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Baptist Health Maintains Continuity During ERP Migration With Spreadsheet Server

Spreadsheet Server
from insightsoftware

Background

Baptist Health began serving Arkansas in 1921 and has grown and thrived for more than a century. Today, the Baptist Health healthcare system includes 13 hospitals and more than 200 clinics. Its mission is to provide innovative, exceptional care that makes it a leader not just in medicine but also in community service.

ERP Migration is a Time-Consuming and Disruptive Process

Rolling out a new ERP system can be highly disruptive. It usually involves reworking business processes to match the new system, retraining staff to use the new ERP, and asking IT teams to spend weeks reformatting or recreating data for reporting. Under the best of circumstances, ERP migration is a bit unpleasant and an operational nightmare under the worst.

Baptist Health

- › **Name:** Darla Cruz, Accounting Manager
- › **ERP:** Infor Financials & Supply Management
- › **Role:** Finance
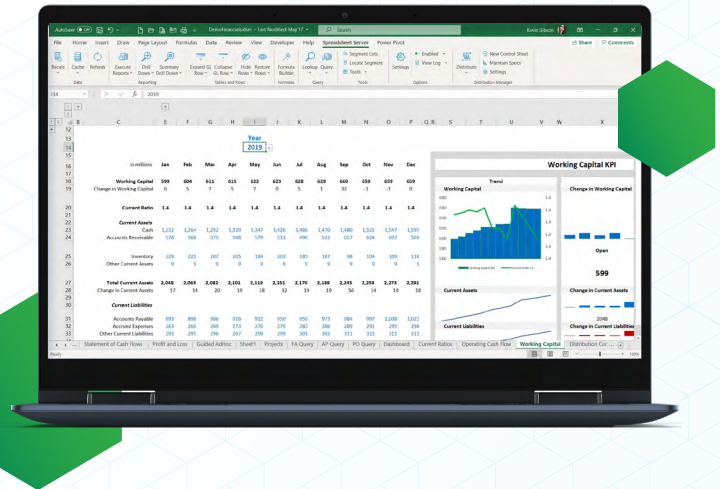- › **Industry:** Health Care & Social Assistance

But thanks to **Spreadsheet Server** from insightsoftware, Baptist Health didn't experience the headaches so commonly associated with ERP migration. The organization moved from Lawson to Infor FSM last year and, as Accounting Manager Darla Cruz recalled, "I think it went pretty smoothly. Of course, with any migration, you will run into a few snags here and there. But," she continued, "overall, I think the migration to Infor FSM was very successful."

Leveraging Spreadsheet Server for a Smooth ERP Transition

Spreadsheet Server is an intuitive Microsoft Excel add-in that integrates with 140+ on-premises and cloud-based data sources to provide users with access to their live data, directly in Excel for reporting and analysis. Because it could integrate with both Lawson and Infor FSM simultaneously, Baptist Health was able to move from the legacy ERP to the new without any disruption to its finance operations.

Without the burdensome need to design and develop new reports or to train personnel in the use of new reporting software Cruz's team could support business as usual without committing the time, expense, and risk typically associated with ERP migration. Spreadsheet Server provided a strong sense of continuity during an otherwise disruptive process.

How Spreadsheet Server simplified Baptist Health's ERP migration:

> **Seamless Data Access:** With near-real-time data access, data is updated in a one- to three-hour window rather than once daily, significantly speeding up the reporting process.
> **Native Excel Integration:** Financial and operational reporting is done within the familiar Excel environment, eliminating the need for extensive product training.
> **Reusable Reports:** Reports automatically roll forward to the next reporting period, making it easy to maintain and update reports without time-consuming copying and pasting.

"We didn't run into any delays in terms of our month-end close and being able to get our files out in a timely manner," Cruz said. "The migration didn't slow us down at all."

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Streamlined Reporting

One of the greatest advantages of using Spreadsheet Server—especially during ERP migration—is its direct ERP connection. By pulling data directly from the ERP, Cruz's team is spared the time-consuming and error-prone process of manually downloading data from Lawson or Infor FSM and reformatting it for Excel. This gives them the agility to create more reports, more often.

"Instead of waiting for data to update once daily, when someone makes a journal entry then transaction data updates within a one- to three-hour window, so we know we have the most current data. That's particularly important at month-end when we're in a time crunch," Cruz said.

Flexibility and Agility

With its sprawling network of hospitals and hundreds of clinics, Baptiste Health generates a huge number of internal transactions every month. Spreadsheet Server's adaptability has become a cornerstone of its operational efficiency. The ability to pull data at a high, organization-wide level or narrow parameters to a single clinic within the system is incredibly useful—it empowers Cruz's team to see the bigger picture and get a stronger grasp of the organization's financial health.

"The way we're structured, there are a lot of moving parts between these different organizations. So, that level of detail is very important," Cruz explained. "Spreadsheet Server helps us narrow it down to the details that we need."

Comprehensive Product Support

Cruz rarely needs to contact Spreadsheet Server support for serious issues; usually support calls are to add or remove users in Baptist Health's internship program. Whether managing user access or getting answers to software functionality questions, Cruz describes her support experiences as "simply amazing," with highlights like:

› Prompt response times
› Helpful suggestions
› Outstanding product knowledge

"We get a resolution to our questions and issues very quickly."
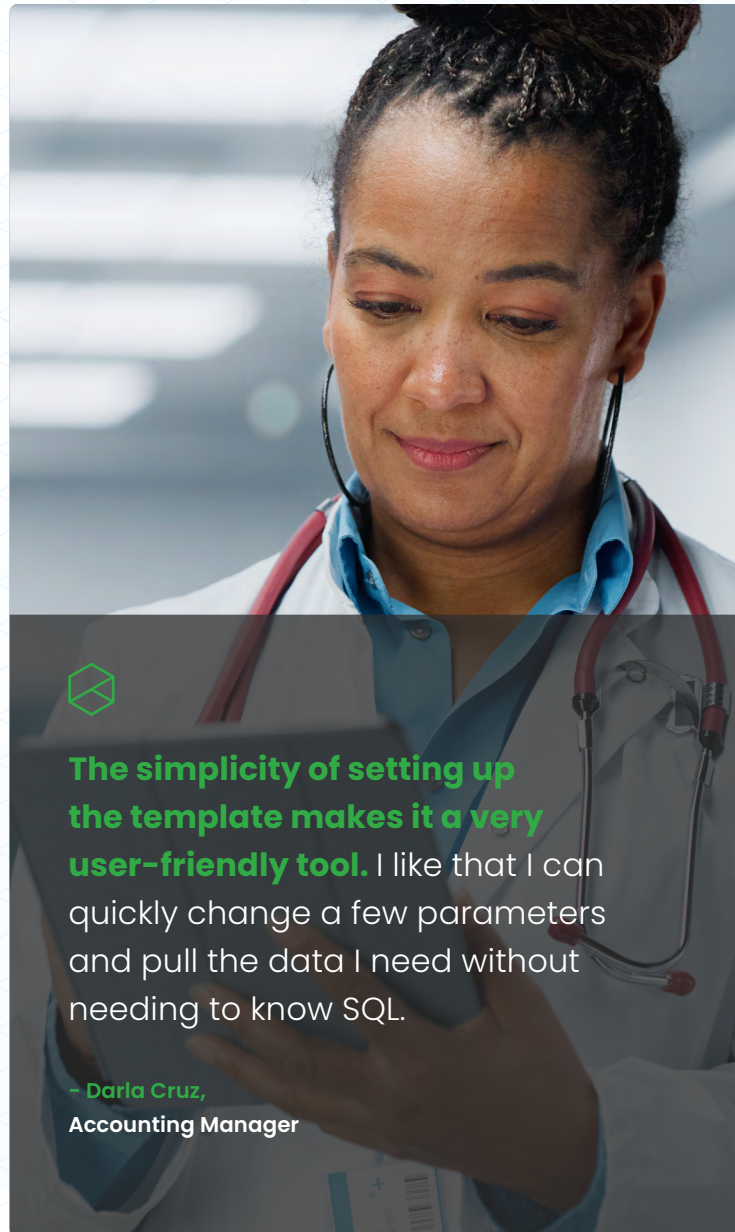
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What's Next for Baptist Health

Cruz noted that Spreadsheet Server is used much more by managers like herself than by frontline accounting staff and that training more members of her team in the software is a goal. "I probably use Spreadsheet Server more than anyone else. My goal is to bring everybody up to speed before the end of the year," Cruz said. "It's a very powerful tool and there is an opportunity to utilize the functionality of Spreadsheet Server so much more going forward. I want to show my team how to use it to their advantage."

She's particularly keen to train her team how to use Query Designer, Spreadsheet Server's drag-and-drop tool for creating custom Excel formulas without coding knowledge. "It would be helpful to create additional queries, especially for ad hoc reporting purposes," Cruz said.

To see how Spreadsheet Server can help your organization experience a seamless ERP migration, **schedule a demo** today.

> **The simplicity of setting up the template makes it a very user-friendly tool.** I like that I can quickly change a few parameters and pull the data I need without needing to know SQL.
>
> – Darla Cruz,
> **Accounting Manager**

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