

Baker Tilly Revas Enhances Client Portal with Logi Analytics

AT A GLANCE

The Customer

- Revas is the outsourcing arm of Baker Tilly, a UK independent firm of chartered accountants and business advisers

The Challenge

- Previously used platforms were inadequate for Revas' client-facing portal

The Solution

- Logi Info

The Results

- Significant timesaving in client take-on costs
- Enhanced functionality for clients
- Won "Best Use of Internet" Accountancy Age Award

THE CUSTOMER

Baker Tilly is an independent firm of chartered accountants and business advisers. Based in the UK, the firm has more than 1,600 employees and more than 250 partners generating a fee income of £190 million positioning the firm as one of the leading mid-tier accountancy firms.

"Logi Info is very intuitive and enabled us to go to market quickly at a fair cost. None of the things we are doing now could be done with products we were using previously."

Kevin Dodson
Associate Director, Baker Tilly Revas Limited

Revas (Results and Value Added Service) is the outsourcing arm of Baker Tilly. It provides a full range of outsourced accounting, payroll, billing, time recording, and corporate secretariat services for organizations which need a cost-effective, tailored alternative to managing their pivotal back office functions in-house.

Revas was using a combination of Microsoft Reporting Services and Crystal Reports with separate ASP.NET framework applications to deliver its client reporting requirements, via its client-facing portal.

THE CHALLENGE

Revas was using a number of reporting platforms in support of its client portal but found the technology inadequate for a variety of reasons.

"We needed to upgrade and enhance the existing reporting platforms, as it was looking dated and had no customization capability. We wanted to replace the framework and mirror our corporate image. There were also usability problems. Once you had run a report, it was a hassle to run it again for a different set of parameters.

"We also had problems with consistency in views between the Web view and PDF exports. Additionally, we had added costs from employing expensive report developers and contractors."

"We sought a solution that would allow us to provide consistent output with minimum hassle, whilst also enabling us to launch quickly," stated Kevin Dodson, Associate Director, Baker Tilly Revas Limited.

THE SOLUTION

"We continued to look at a number of possible solutions including Cognos and BIRT as well as Logi. However, Logi stood out as it was a true Web-based product and could be implemented at a reasonable cost, without us needing to invest significantly in training for our developers.

"With Logi Info, we could leverage our existing staff with limited Web and SQL experience to write reports. The Logi Info development tools are very intuitive and enabled us to go to market quickly and at a fair cost," stated Mr. Dodson.

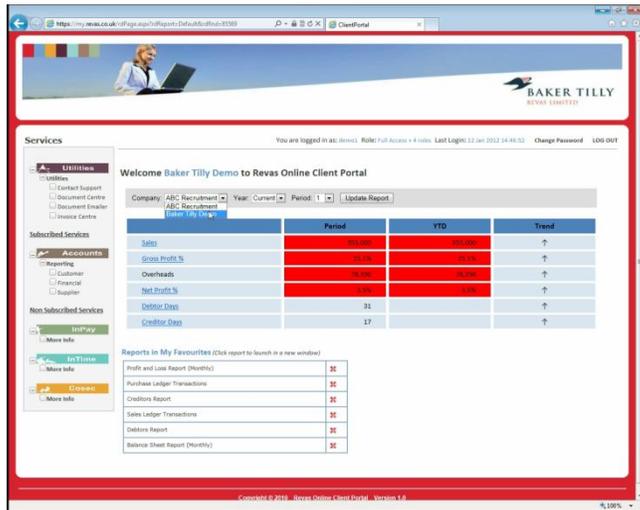
THE RESULTS

Dashboards

"We were able to pilot our client portal within 90 days. We established a standard, data-driven dashboard with various key indicators, and drill down capabilities. We also

customized the look and feel by rebranding the log-in page and embedding jQuery.

“Unlike our previous solutions, these reports are data driven with output from the database. There is nothing hard-coded in the reports. Users select from a drop down and filters are dynamically displayed from the financial system.



The screenshot shows the Baker Tilly Revas Online Client Portal. The main content area features a table with the following data:

	Period	YTD	Trend
Sales	20,000	20,000	↑
Gross Profit %	33.3%	33.3%	↑
Overheads	10,000	10,000	↑
Net Profit %	16.7%	16.7%	↑
Debtors Days	31	31	↑
Creditors Days	17	17	↑

Below the table is a section titled "Reports in My Favourites" with a list of reports and their status:

Report Name	Status
Profit and Loss Report (Monthly)	OK
Purchase Ledger Transactions	OK
Creditors Report	OK
Sales Ledger Transactions	OK
Debtors Report	OK
Balance Sheet Report (Monthly)	OK

Expand Access to Data with Dashboards

“Only members of clients’ financial teams have access to the financial system. However, with the new dashboards, senior executives are now able to see details without needing to understand or learn how to use the financial system.

“Clients can also have customized dashboards. Depending on which client logs in, they are presented with the standard dashboard or their custom, dynamic one. Reporting is more interactive, and customers love it,” stated Mr. Dodson.

Timesaving

“The development of reporting packs for clients is now a database configuration dependent process, as the reports are a single layout across all the clients and are data driven. This provides significant timesaving in our client take-on costs.

“Previously, reports had to be hard-coded. We couldn’t pass parameters in or manipulate the data in transit dynamically to a different database. Database configuration settings alone would have taken two to three days, and we required a week to write a report. Now

deployment takes a fraction of the time,” asserted Mr. Dodson.

Single Development Environment

“The entire application is written with Logi Info, so we no longer need to manage multiple applications. With the old environment, the reporting framework and the report delivery software were two different applications and the link between the two was tough to maintain. None of the things we are doing now could be done with our previous platforms,” recounted Mr. Dodson.

Password Management

“We had, historically, a problem with support staff managing client passwords in multiple places on multiple third party applications, and they had to do all this manually. This was complicated by some of the applications requiring Active Directory authentication.

“The Logi framework now allows clients themselves to manage passwords. By using a combination of plug-ins, Web service calls, and SQL scripts, we were able to change the passwords in all of the applications including Active Directory. The flexibility of Logi enabled us to overcome a lack of flexibility in these other systems. This new feature was built in only three days, with another two days for testing,” explained Mr. Dodson.

Automated Email

For security reasons Revas does not allow email facilities in the terminal services environment. With no way to send an email within that environment, users previously had to export to PDF, copy to a local machine, and then email.

“We wrote a process and a Logi report that was able to deliver purchase orders by email and write back to the purchase order system that the email had been set. Users can also review their remittance advices, and send directly to suppliers from there. They can decide what documents to email and when, which saves clients time,” stated Mr. Dodson.

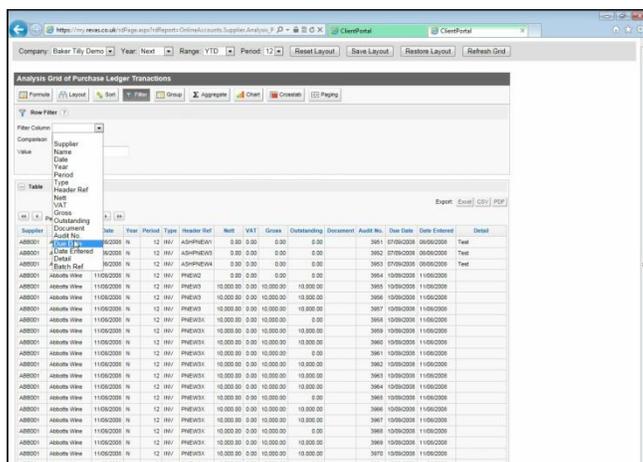
Document Management

“We wanted documentation to be visible through the reports within the client portal. This was to overcome limitations where clients would want to see a document we had or vice versa. The use of plug-ins, Web integration, and reporting enhancements meant we were able to deliver this elegantly with little custom development on our part. We were able to use an OCR application we already had,” stated Mr. Dodson.

Analysis Grid

“The use of analysis grids allowed us to not have to send data to clients by spreadsheet. They could actually filter, export, and present the data in the way they wanted to themselves, which is very powerful,” stated Mr. Dodson.

The Logi Analytics Analysis Grid enables Revas to provide clients with extensive data analysis capabilities in a single visual element. Clients are able to analyze and query data in multiple, powerful ways without the company having to provide custom reports. Using the Analysis Grid, Revas’ clients can view purchase ledger transactions, as well as images of uploaded documents and invoices including barcodes.



The screenshot displays the 'Analysis Grid of Purchase Ledger Transactions' interface. It includes a top navigation bar with options like 'Company', 'Baker Tilly Demo', and 'Year: Next'. Below this is a 'Filter' section with various controls. The main area is a table with columns for Supplier, Document, Date, Year, Period, Type, Header Ref, Net, VAT, Gross, Outstanding, Document, Audit No., Due Date, Date Entered, and Detail. The table contains multiple rows of transaction data, including entries for 'Absolute Wine' and 'Absolute Vodka'.

Supplier	Document	Date	Year	Period	Type	Header Ref	Net	VAT	Gross	Outstanding	Document	Audit No.	Due Date	Date Entered	Detail
AB8001	110902008	11/09/2008	N	12	INV	ASHPIED04	0.00	0.00	0.00	0.00	3861	12/18/2008	20/09/2008		Test
AB8001	110902009	11/09/2009	N	12	INV	ASHPIED03	0.00	0.00	0.00	0.00	3862	12/18/2008	20/09/2008		Test
AB8001	110902010	11/09/2010	N	12	INV	ASHPIED04	0.00	0.00	0.00	0.00	3863	12/18/2008	20/09/2008		Test
AB8001	Absolute Wine	11/09/2008	N	12	INV	PNEWEX	0.00	0.00	0.00	0.00	3864	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2009	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	10,000.00	3865	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2008	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	10,000.00	3867	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2009	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	0.00	3868	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2009	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	10,000.00	3869	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2009	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	0.00	3870	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2008	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	10,000.00	3871	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2009	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	0.00	3872	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2009	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	10,000.00	3873	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2009	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	0.00	3874	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2009	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	10,000.00	3875	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2009	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	0.00	3876	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2009	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	10,000.00	3877	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2009	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	0.00	3878	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2009	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	10,000.00	3879	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2009	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	0.00	3880	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2009	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	10,000.00	3881	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2009	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	0.00	3882	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2009	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	10,000.00	3883	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2009	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	0.00	3884	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2009	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	10,000.00	3885	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2009	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	0.00	3886	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2009	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	10,000.00	3887	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2009	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	0.00	3888	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2009	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	10,000.00	3889	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2009	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	0.00	3890	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2009	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	10,000.00	3891	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2009	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	0.00	3892	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2009	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	10,000.00	3893	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2009	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	0.00	3894	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2009	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	10,000.00	3895	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2009	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	0.00	3896	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2009	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	10,000.00	3897	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2009	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	0.00	3898	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2009	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	10,000.00	3899	12/18/2008	11/09/2008		
AB8001	Absolute Wine	11/09/2009	N	12	INV	PNEWEX	10,000.00	0.00	10,000.00	0.00	3900	12/18/2008	11/09/2008		

“We would never have been able to deliver any of this with the previous platforms. Development took us only four days and ordinarily it would have taken months,” concluded Mr. Dodson.