Missoula's Secret to
Faster Management Reporting

workiva®

As Financial Reporting Supervisor and Budget Manager for the city of Missoula, Scott Paasch wanted to modernize the Montana city's old way of creating financial reports. For Scott, the old way involved copying and pasting 50,000 to 60,000 lines of data from the enterprise resource planning (ERP) system and asking departments to hand check data against the general ledger.

"It was a very time-consuming process of extracting all of our information out of our ERP into spreadsheets," Scott said. "We'd spend a great deal of time manipulating the spreadsheets just to make it consumable. Every time we'd have to update or change our data, we'd have to go through that process all over again. It was a lot of waste and a lot of version control issues. We never knew which one was the most current or correct version."

Scott also knew the city might switch ERPs at some point, so any financial reporting solution needed to be flexible enough for the future.

"When we started looking at Workiva, one of the biggest draws was being able to connect to any kind of data source to pull the information in," Scott said. "It couldn't be matched by anybody else."

Connected data is trusted data

With Wdata, users can pull information from multiple software applications and connect it directly to reports within Wdesk. Scott's team set up Wdata to automatically pull fresh data nightly, replacing manual processes.

"We don't worry about data integrity anymore, and our analysts have more confidence in what they are reporting," Scott said.

Implementing Wdata did not take long. "Within the first month, I had three management reports created. So it was pretty streamlined. It was very intuitive, very straightforward," Scott said.

Management reports in weeks instead of months

Thanks to Wdata, Scott's team no longer spends the first 40 minutes of each day pulling in numbers.

They also have fully integrated Wdata throughout the budgeting process. Before Wdata, they would get baseline budget numbers by pulling information out of their ERP into traditional spreadsheets. Then they'd take into account new budget requests, compile data, get city council approval, adopt templates, and key data back into the ERP by hand. Scott figured out how to use Wdata to populate dashboards he built in Wdesk to provide greater transparency and show potential effects of budget decisions. Wdata streamlined the process so much that the first budget import into the ERP happened three months earlier than the previous year.

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CITY OF
MISSOULA

Organization:

City of Missoula

Situation:

Rather than copying and pasting 50,000 to 60,000 lines of data to create city reports and asking departments to hand check data against the general ledger, the financial reporting supervisor wanted an efficient way to pull and refresh data.

Solution:

The city selected the Workiva connected reporting and compliance platform, including Wdata, a game changer for orchestrating how data flows from multiple systems and applications to dashboards and reports.

Results:

- Eliminated the need to spend 40 minutes each day manually pulling in numbers

- Saved months of time in creating budgets and management reports

- Increased level of trust in reporting by both analysts and auditors

- Reduced the risk of error from copying and pasting

Why the company chose Workiva:

- Ability to connect to any kind of data source

- Complete confidence in data integrity

- No long, drawn-out RFP process necessary

It's a fantastic tool. I didn't realize the extent of it until I actually started using it. Then I thought about what else can you put in there—essentially any dataset that you can come up with.

—SCOTT **PAASCH,** *Budget Manager, City of Missoula*

Connecting more data from more departments

Up next, Scott would like to look at marrying the financial data his team uses with datasets from other departments that use programs outside the ERP to create additional reports—from the utilities commission to recreation programs. For Missoula, the sky's the limit.

"It's a fantastic tool," Scott said of Wdata. "I didn't realize the extent of it until I actually started using it. Then I thought about what else can you put in there—essentially any dataset that you can come up with."

"I would highly recommend Workiva," Scott said. "It's a wonderful product, wonderful platform. I would say look at what you're doing, and ask how can you do it better. This can be a tool that can make it a lot easier."

"We've saved so much time in our processes by implementing Workiva," Scott said.

See what Workiva can do for you. Visit **workiva.com/request-demo**

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