

# Executive Reporting Example

## Fish & Richardson P.C.

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August 19, 2013



# F&R Profile

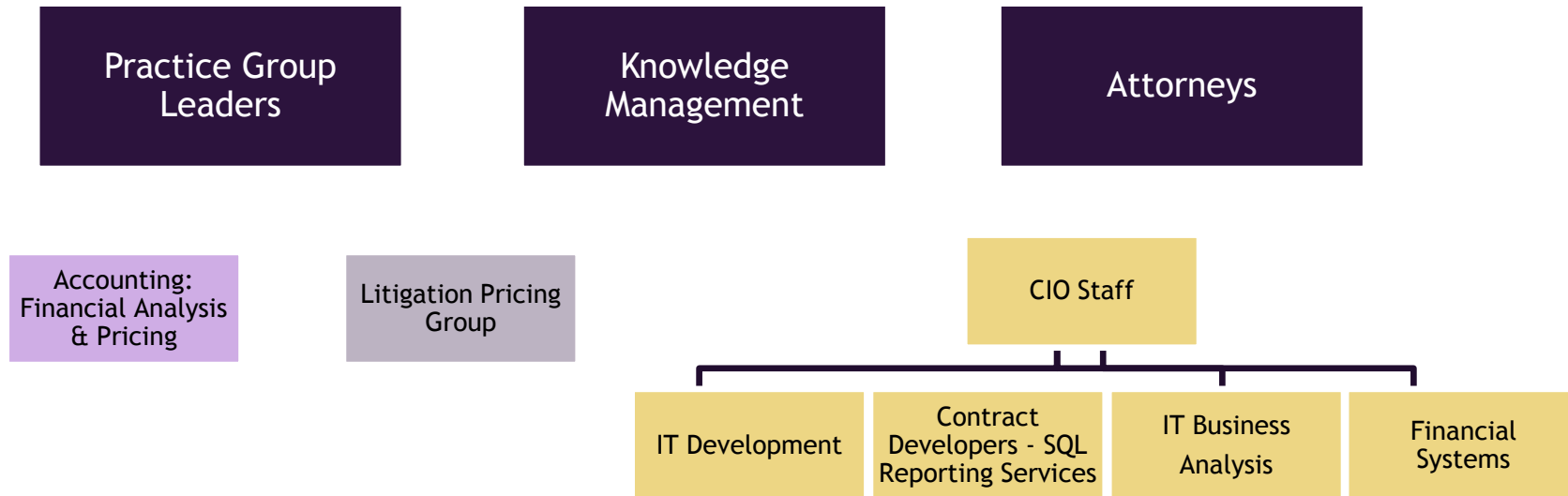
- ◆ 11 offices (US & Abroad)
- ◆ 450 Lawyers
- ◆ 1100 Users
- ◆ Primary Focus - Intellectual Property and IP Litigation

# Business Need: Enterprise Reporting

**Needed fast, easy and regular provisioning of meaningful data to our business leaders and attorneys**

- Challenges:
  - Data housed in various disparate systems
  - Report requests were largely handled manually
  - Reports were static and outdated quickly
  - Reports were request specific and were not broadly applicable
  - Supplement current BI and Scorecard tools

# Collaboration



# Solution Requirements

## Access & Presentation

Reporting HOME  
Single Point of Entry

On Demand Access

Canned Reports

Custom Report Creator

Security  
Roles

## Data

Paired from multiple  
systems

Real-time  
(or as close as possible)

Accurate

Historical comparison

Security

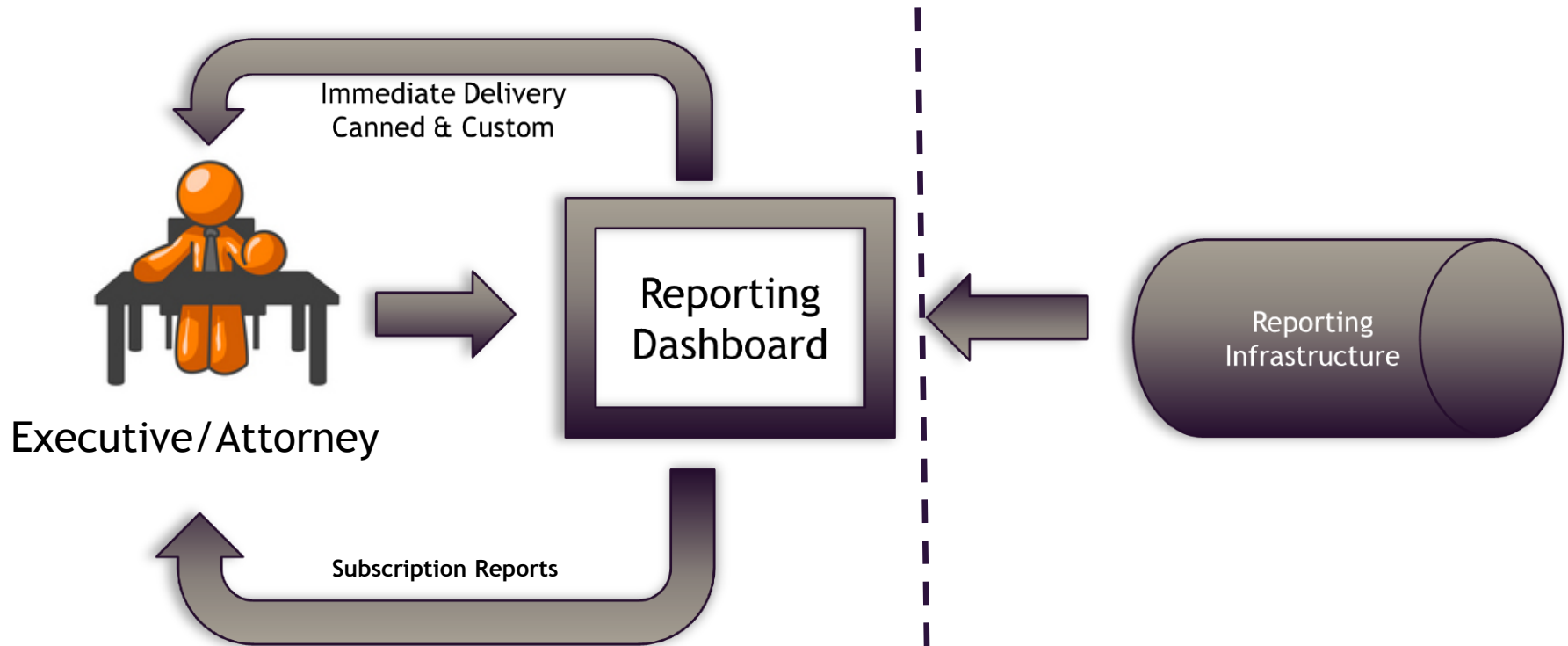
## Usability Features

Subscription Services

Custom Reports must  
be savable and easy to  
re-access

Downloadable to Excel  
for native program  
manipulation

# Solution Overview



# Technical Challenges

- ◆ Data Residence (multiple locations, data overlap)
- ◆ Data Integrity
- ◆ Data Validity (context of time entry, etc.)
- ◆ Security
  - ◆ Report Level
  - ◆ Field Level

# Solution Architecture

## Presentation

- SQL Reports
- Dashboard for accessing and generating reports
- Ability to download to Excel for individual manipulation

## Middle Tier

- SQL Reporting Services

## Data

- Identification of desired data points from various systems (Financial, Docketing, DMS, Case Management, Custom Apps)
- Creation of a centralized reporting database consisting of nightly pulls



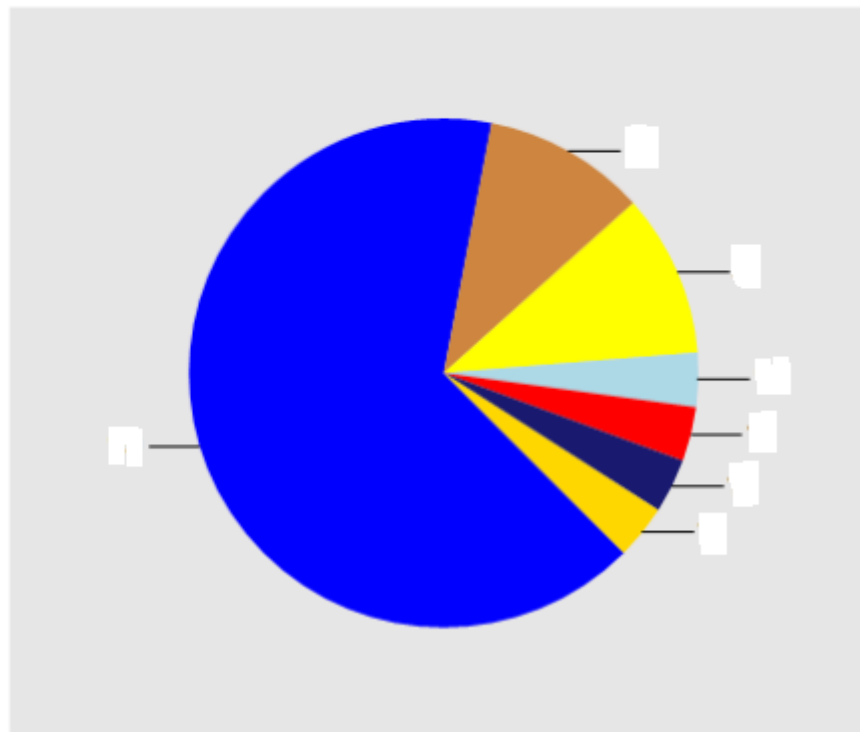
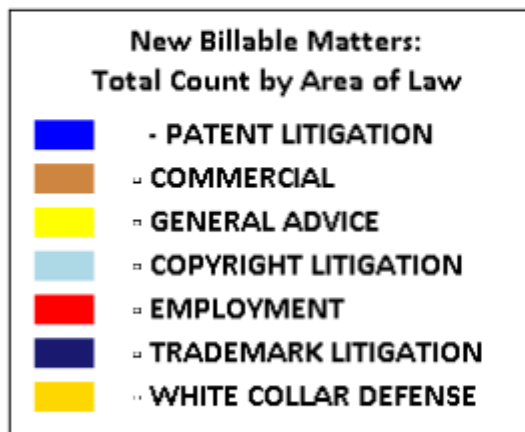
# Visuals

## New Matter Dashboard

Date Updated: Aug 4 2013 8:00AM

From: [redacted] To: [redacted]

□ **New Billable Matters by Area of Law - Total Matters: 29**



# Reporting Framework

- SQL Queries/Stored Procedures
- SQL Server Integration Services (SSIS) used to pull data

SQL Reporting Services



- Power Pivot
- Pivot Table connected to a SQL Server Analysis Services Cube

MS Excel 2010



- Custom ASP.NET 4.5 (SSIS Consolidation)
- Report interface integrated into desktop + VSTO integration apps
- Some Silverlight and HTML5 for charting and graphing

Web-based

