



## CaseWare Is The Firm-Wide Solution For Meyers Norris Penny

### CUSTOMER

Meyers Norris Penny LLP

### HEADQUARTERS

Calgary, Alberta

### Number of Locations

75

### Number of Employees

2,200

Meyers Norris Penny LLP (MNP) is the seventh largest chartered accountancy and business advisory firm serving Canada's mid-market enterprises. The firm has 75 offices from British Columbia to Ontario and more than 2,200 employees. The integrated, electronic working papers solution MNP relies on is Working Papers, the award-winning engagement software from CaseWare.

### Invest In A Scalable Solution

When Heather Lajeunesse, technology department manager, joined the firm, MNP was embarking on a comprehensive plan to move to a paperless digital office and Working Papers was proving to be a key player in that initiative.

The firm had been using a homegrown system for managing client audits, financial statement generation, and communications. "We had outgrown that system," says Lajeunesse. "It no longer had the power, functionality, or scalability MNP needs."

Lajeunesse had used Working Papers at another firm, so she was enlisted to help with the conversion to the new solution.

Today, more than 1,700 individuals across the firm use Working Papers. "By using



the same system in all of our offices, we're better able to leverage our talent," explains Lajeunesse. "Staff can move from one office to another to meet an unexpected demand and immediately be productive."

### Ensure Consistent Quality

The firm has an internal "CaseWare Team" that generates templates for the firm's Assurance, Tax, and Advisory Services Lines. "Working Papers is the tool we use to manage documents for each service line," says Lajeunesse. "The templates ensure consistency in the firm's communications and dramatically reduce the time our team members spend setting up a file."

Templates also ensure that the firm's professional standards are met, since they provide the underlying architecture for letters, checklists, financial statements, and analytical review documents. Once

### CHALLENGE

Meyers Norris Penny required a powerful and scalable electronic working papers solution that it could implement across all of its 75 offices.

### SOLUTION

CaseWare Working Papers and the CaseView report writer are used in all offices by more than 1,700 staff members.

### RESULTS

With a single firm-wide solution, staff resources can be shared where needed across offices. Customer-facing documents have a consistent appearance with less effort.

*"Working Papers is the tool we use to manage documents for each service line. The templates ensure consistency in the firm's communications and dramatically reduce the time our team members spend setting up a file."*

Heather Lajeunesse  
Manager, Technology Department

### **About CaseWare International Inc.**

Accountants and auditors in practices large and small, in corporations, and government recognize CaseWare International as the premier creator of assurance, reporting and analysis tools. In over 130 countries, the CaseWare family of products helps accounting professionals perform their work more easily and efficiently.

set up for a client, the templates link, in real time, to the data in the Working Papers trial balance, helping to automate the entire audit process. When a change is warranted, it can be made to the template and the updated information will flow to each new file established.

"Working Papers ensures that a financial statement generated in our Calgary office has the same professional look as one generated by our Winnipeg office," says Lajeunesse.

### **Streamline Workflows**

Lajeunesse praises CaseView, the powerful report writer included with Working Papers. Real-time linkages to account properties and amounts in Working Papers are incorporated, so that when staff adjusts a journal entry it immediately updates any amount.

MNP's in-house technology team takes advantage of the scripting capabilities inherent in CaseView to automatically update an SQL data warehouse each time an engagement is saved anywhere in the firm. This allows the firm to manage client service standards and effortlessly compile comprehensive bench-marking information for their clients.

Scripting also is used to build industry-specific audit programs that staff members use to ensure that they are collecting the appropriate data required for an audit of a health care organization, for example. "We're taking advantage of the tools within CaseView to streamline processes and save our staff time and effort," says Lajeunesse.

### **Securely Access Anytime-Anywhere**

Working Papers serves as a centralized document management system for MNP. Staff can organize all documents—including Working Papers, Word, Excel, PDF, or scanned correspondence—related to each engagement in one area. "It's a very clean and organized view of our clients' files," says Lajeunesse. "The interface is similar to Windows Explorer, so it's familiar and easy to navigate. We can even compress files to save storage space."

With the software's flexible database system, Working Papers can be accessed over the firm's wide-area network and from a client location, with many users sharing one engagement file. Document and record locking ensure that sensitive data is secure while being updated and maintained within the entire organization. "We can sign-out the engagement documents we need, work on those on our laptops in the office or remotely, and then check them back in with the updates," explains Lajeunesse. "We might even have two office locations working on different aspects of an engagement, and each office can check out just the files they need."

Meyers Norris Penny's investment in Working Papers has proven to be a wise one. The solution's flexibility and scalability deliver efficiencies, time savings, and promote the professional service mission of the firm.

United States

CaseWare International Inc.  
2425B Channing Way, Suite 590  
Berkeley, CA 94704  
Phone: 1 800 267 1317  
Fax: +416 867 1906  
www.caseware.com

Canada

CaseWare International Inc.  
469 King Street West, 2nd Floor  
Toronto, Ontario M5V 1K4  
Phone: +416 867 9504  
Fax: +416 867 1906  
www.caseware.com

