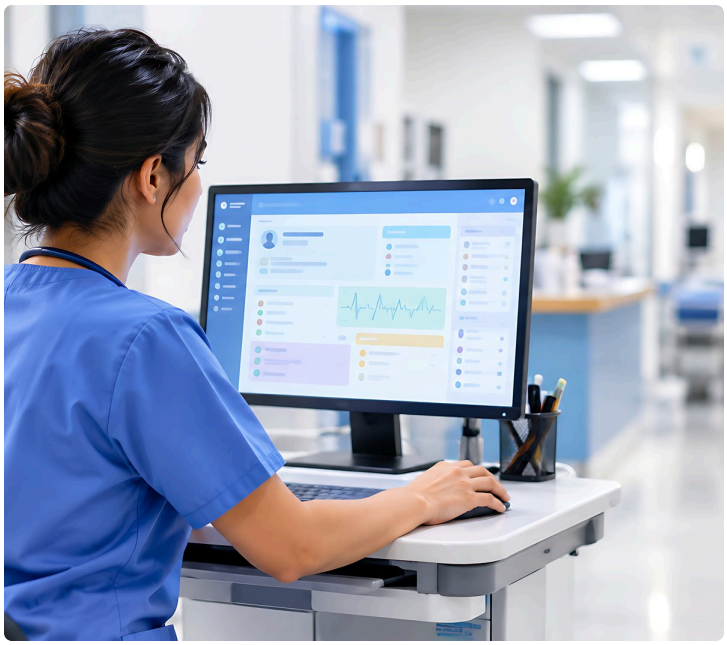
CASE STUDY

Harrogate and District NHS Brings Clarity to EPR Testing and Reporting

An NHS trust consolidating legacy systems onto a new electronic patient record replaces Excel tracking with clear testing status reports the whole project team understands.

Harrogate and District NHS Foundation Trust, North Yorkshire



CYMETRYC

EXECUTIVE SUMMARY

From Excel Chaos to Clear Status Reporting

Harrogate and District NHS Foundation Trust is implementing a new electronic patient record (EPR) that replaces paper-based processes and brings many disparate systems, each previously tested locally by its own team, onto one platform. To secure EPR funding from central NHS bodies, the Trust had to explain how it would manage software testing on a much larger, consolidated clinical project.

Daniel Carter, Patient Systems Operational Manager, knew from his time in banking that hundreds of test cases could not be managed in Excel. After seeing Cymetryc used by pathology teams on a LIMS implementation across the West Yorkshire pathology network, the Trust built Cymetryc into its use case and business case.

The team now documents testing and logs incidents in Cymetryc. Daniel can see run rate, incidents and work in flight at a click, and a Cymetryc summary report with his own narrative has replaced the multiple reports he used to prepare. Now in phase two, the wider EPR team receives his reports without question.

One New EPR

Multiple legacy systems consolidated onto a single electronic patient record

Testing Scale

Hundreds of test cases in phase one, across several workstreams

Reporting Outcome

Status reports the wider project team understands without question

> **“Cymetryc has done what I needed it to do. It's fulfilled the core aim, which for me was clear testing status reporting, clear progress, clear tracking and clear incident reporting. We are now able to do that quickly.”**
>
> **— Daniel Carter, Patient Systems Operational Manager, Harrogate and District NHS Foundation Trust**

THE CHALLENGE

Many Systems, Many Teams, One EPR

Until now, separate teams managed separate systems and handled their own software testing locally. Bringing those systems onto one EPR meant one much larger testing effort, and the Trust's business case to central NHS bodies had to explain how it would be managed.

Testing Done Locally

Each team tested its own system its own way, with no shared view across the project.

Hundreds of Test Cases

Phase one alone would run to hundreds of test cases, too many to track in spreadsheets.

No Clear Status

Excel couldn't show run rate, open incidents or what each workstream was doing without manual digging.

Avoiding Chaos

Before joining the Trust, Daniel worked in banking, where a dedicated testing platform recorded issues and tracked progress. He knew what the EPR project would look like without one.

> *"For the first phase of the Trust's EPR project, I knew the number of test cases would number in the hundreds and that would not be manageable on Excel. We would not be able to say what our run rate is, what our incidents are, what different workstreams are doing. It would have become chaos, and I'd be going through Excel sheets manually getting the information out."*
> *— Daniel Carter*

The Trust needed testing status it could report at a glance, to the project team and to the bodies funding the EPR.

THE PROJECT

How Cymetryc Supports Harrogate's EPR Testing

The Trust learned that its pathology teams were already using Cymetryc to centralise user acceptance testing for a laboratory information management system (LIMS) implementation across the West Yorkshire pathology network. After reviewing the platform and speaking with those pathology teams, the Trust prepared the use case and business case and submitted them for approval.

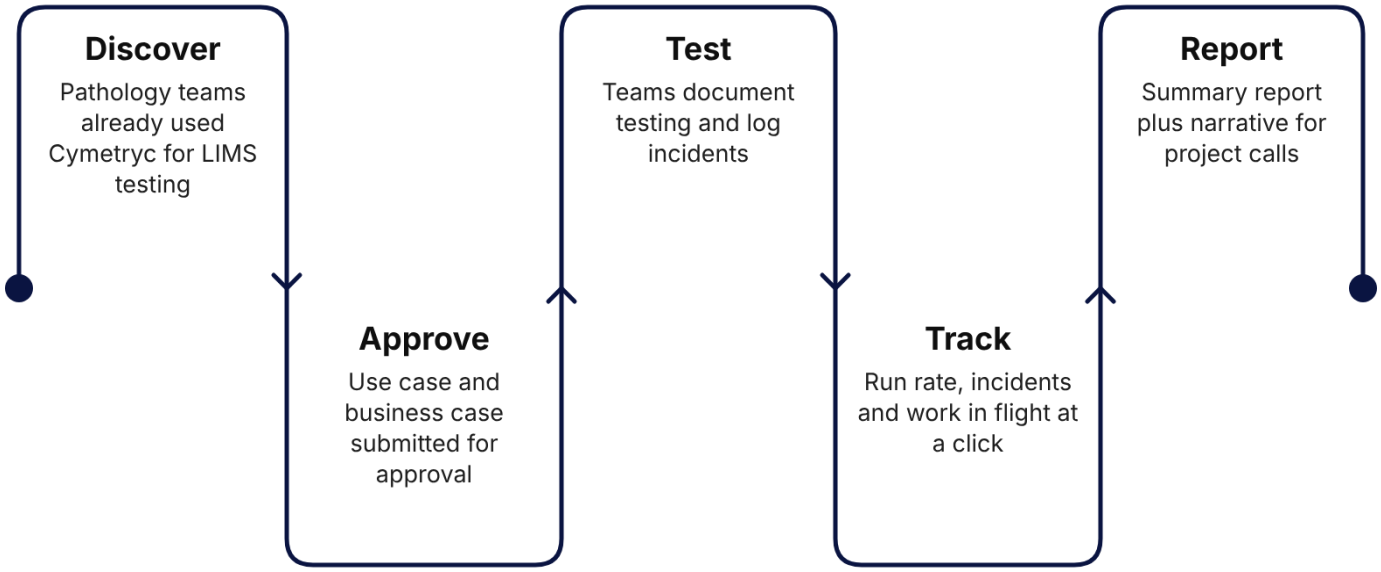
> *"I knew, based on my experience with other tools that Cymetryc would work for us."*
> *— Daniel Carter*

Testers document their work and log incidents in Cymetryc, giving Daniel one place to see progress across every workstream. Many of the team were new to this kind of testing platform, and the feedback has been positive.

> *"They find Cymetryc easy to use. More people are getting used to how it works and can do their own thing with it without any guidance."*
> *— Daniel Carter*

Lessons from phase one shaped how the team set up phase two, which has made status and progress reporting easier still. Cymetryc reporting now supports the project calls held twice a week with the supplier, the clinicians and the team.

Run rate, incidents and work in flight are a click away, not buried in Excel sheets.



RESULTS & IMPACT

Clear Status, Less Effort, No Questions

100s

Test Cases in Phase One

Documented and tracked in Cymetryc instead of spreadsheets

3

Test Reports, No Queries

Three status reports sent in the current testing cycle, understood without question

1

Summary Report

One Cymetryc summary report plus narrative replaces the multiple reports Daniel used to build

2x

Project Calls a Week

Twice-weekly calls with the supplier, clinicians and team, supported by Cymetryc status reporting

✓ Core Aim Met

Clear testing status, progress, tracking and incident reporting, available quickly.

✓ Fewer Reports to Build

A Cymetryc summary report plus narrative replaces multiple manually prepared reports.

✓ Reports People Trust

The wider EPR team understands the reports and knows exactly where each workstream stands.

✓ Easy Adoption

Team members new to testing platforms find Cymetryc easy to use and work in it without guidance.

> **“I've sent out three test reports now in this testing cycle and no one's questioning them, they understand them. I can provide them with the data and they know exactly where we are in our work stream.”**
>
> **— Daniel Carter, Patient Systems Operational Manager, Harrogate and District NHS Foundation Trust**

NEXT PHASE

Into Phase Two

The Trust is now in the second phase of its EPR implementation. Daniel has changed how the team works based on what phase one taught them, and the wider project team has come to expect status reports generated from Cymetryc.

“I used to prepare multiple reports. Now, I can use a Cymetryc summary report to which I add some narrative, and it’s much easier,” he said.

> ***“I can click and see where the incidents are, what the run rate is, what’s in flight, etc. It’s easy for me to pull that information together from Cymetryc rather than dig through Excel sheets. And that’s really what it’s all about. It’s ease of reporting, ease of managing our progress.”***
>
> **— Daniel Carter, Patient Systems Operational Manager, Harrogate and District NHS Foundation Trust**

Lessons Applied

Phase-one learning reshaped how testing is set up for phase two, making reporting easier.

Growing Self-Sufficiency

More of the team now works in Cymetryc on their own, without guidance.

Reports the Team Expects

The wider EPR team now expects Cymetryc status reports and understands them at a glance.

Ready to Simplify Your Validation Process?

See how Cymetryc can help your team organize testing, capture evidence and produce inspection-ready reports.

Learn More

cymetryc.com

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Schedule a Demo

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