



Ai Group reaping the benefits of adopting cloud-based Microsoft Dynamics 365

Ai Group went through a huge overhaul of their internal processes to upgrade their ERP system, taking multi-company entities into one operational database of Dynamics 365 Business Central. The result has transformed their finance department to improve processing and enabling work from anywhere.

The Australian Industry Group (Ai Group®) is a peak national employer organisation representing traditional, innovative and emerging industry sectors. They have been acting on behalf of businesses across Australia for nearly 150 years.

Ai Group is genuinely representative of Australian industry. Along with partner organisations they represent the interests of more than 60,000 businesses employing more than 1 million staff. Their members are small and large businesses in sectors including manufacturing, construction, engineering, transport & logistics, labour hire, mining services, the defence industry, civil airlines and ICT.

With more than 250 staff and networks of relationship their deep experience of industrial relations and workplace law positions Ai Group as Australia's leading industrial advocate. Their subsidiary companies are involved with training in excess of 300 apprentices and trainees across Australia.

The challenge:

NAV was no longer being supported

Ai Group had relied on a fit-for-purpose, highly customised version of Microsoft Navision 2013 (NAV) and Dynamics 365 CRM. In 2019, Microsoft announced support was being wound-up for NAV 2013 prompting Ai Group to re-consider changes in their internal processes along with upgrading their ERP system. EBS were brought in to implement the upgrade to Microsoft Dynamics 365 Business Central along with Continia Document Management.

Given the organisation's size and multi-company entities, the planning involved before embarking on the project was key.

“The complexity of our system is the range of locations and that we had come from a multi-entity NAV system with a consolidation company, and that was time consuming. End-of-month would cost us half a day to do a consolidation process – which was a nightmare. We had a requirement in Business Central to have one operational database and have one of the key dimensions as a legal entity.”

Daryl Lynch,
Financial Controller,
Ai Group

The journey:

The search for a solution and implementation process

Ai Group had conducted a lot of work in discovery and had many discussions with stakeholders that needed to be involved to get the project up and through governance process. Financial Controller, Mr. Daryl Lynch said, "EBS were pretty amazing with the process. There was a lot discussion about the project plan and whether the timelines were achievable."

There were many moving parts to the implementation and involved different vendors. Ai Group choose to upgrade to Dynamics 365 Business Central and Customer Engagement at the same time. Despite best intentions, the implementation crossed over into the new financial year. Mr. Lynch recalled, "In the third week of July, we were finalising the implementation and activity running out of Business Central (BC) into the system that we'd moved across successfully, and we had the auditors all around us in the Melbourne office. It was a relatively new accounting team in Melbourne (the previous team operated out of Sydney). There were processes that were new, we had people that didn't know NAV, didn't know the in-and-outs of the organisation that were learning Business Central, that were trying to deal with the end of year. All in all, it was a bloody amazing effort. There's a lot of hard work by a lot of people and a lot of late nights."

Not only did Ai Group put in a new system, they also changed the entire structure of reporting

and the account numbering systems as part of their planned growth for the future. "We wanted everything to be right. So, we took the opportunity to simplify and if you look deeply and understand what is behind the changes which we simplified, we've made it more organised and structured," said Mr. Lynch.

The outcome:

The results and benefits following implementation

Before using Business Central, Ai Group were spending up to five hours a month to complete month-end tasks and all the users needed to be out of the system for it to be completed. Now using Business Central they have one company with one database system with all the legal entities in real time operations which allows them to do a lot more in the system.

Mr. Lynch said, "We get to a point during the end of month process where all the accounts payable (AP) is in the system and we can check that, post the invoices and then shut AP entry for that month. Then AP just continues working forward, but the accountants can enter their accruals, do their reviews and finalise the appropriate pieces of work. We've changed subtly some of the structures the way we do our fixed assets reporting. We've got a whole process that just rolls up."

The implementation of Continia Document Management with optical character recognition (OCR) invoicing has enabled Ai Group to achieve paperless accounts payable. The changes made to the financial system

have proven effective in the delivery of the OCR system with Mr. Lynch saying, "All of those things have come together, and the OCR system has been an absolute boon. We have managed to move from a couple of staff, to one person managing most of that. AP entry of all invoices into one system is simplified using keywords to identify the legal entities, departments, cost centres and GL accounts. We have regular reviews of the process and we had reports written by EBS. A special report was modified for us, so that I could get the information of the new structures and there was a lot of the checking with the new department codes for any errors. The procure to pay system we are implementing with some special modifications to suit our governance requirements will remove a lot of that process in the future and streamline a paperless style checking process."

This new process has enabled other staff members to be responsible for the tasks that previously fell to Mr. Lynch in his already busy day.

The future:

Moving to a COVID-Normal world

In mid-March 2020 COVID-19 forced Ai Group's financial team to work from home. Mr. Lynch recalls, "It was all pretty quick. We got notification that we had to vacate the office by the following day. We scrambled around, I grabbed multiple screens for the team and fortunately the team had notebooks or Surface Pros. I bought a couple of printers for those that had a need for printer/scanners. Since then, there's been about five days of work in the office done in the past 7 months by the entire team in Melbourne."

"I shudder to think what our process with Navision through a VPN during COVID-19 would have looked like compared to having a cloud-based Business Central system in the process. I don't think we would have been as functional.

"We're finding that in Melbourne in particular, where most of the team is based, that we are quite comfortable to continue working more or less full-time or part-time from home into the future. I think most organisations will be having these discussions. From a finance perspective, there's not a lot of heartache in that decision. The software piece has been positive in allowing the ability to work from home. We can screenshare, make entries and watch the transactions go through. It's worked really well."



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