RPC New Brunswick Upgrades to Dynamics 365 Business Central

Case Study

catapult

rpc
SCIENCE & ENGINEERING

RPC is New Brunswick's provincial research organization, a research and technology organization offering contract R&D and technical services at locations in Fredericton, Moncton, and St. George, New Brunswick. RPC's mission is to improve industrial and environmental processes for a broad spectrum of clients from different industry sectors. They are a rapidly growing organization with over 160 scientists, engineers and technologists who are supported by world-class facilities for the development and improvement of products.

RPC partnered with Catapult to implement a modern financial management infrastructure using Microsoft Dynamics 365 Business Central. The new solution is delivering major improvements within the RPC organization that are driving efficiency and supporting business growth.

Stuck in the Past

RPC was an early adopter of Microsoft Dynamics NAV, implementing almost 25 years ago and stabilizing on version 3.7, which has not been supported by Microsoft in well over 15 years. RPC remained on an unsupported version of NAV because they had also built an integrated custom lab management module that would have posed challenges to upgrade.

Timesheet Turmoil

NAV 3.7 had powerful capabilities in it's day but became increasingly difficult to support. IT staff had to downgrade workstation operating systems and software to run NAV. The customizations were unreliable causing a significant amount of aggravation for the team. RPC's financial processes were very manual, and paper based. Over 170 RPC staff members were completing Excel timesheets and submitting to department admins for review, prior to manually entering the data into

NAV. Frequently, admins had to chase individual employees to obtain missing timesheets. The payroll and finance team depended on these disjointed processes for accurate pay runs and invoicing, resulting in frequent errors and wasted time.

> " We did the best we could with what we had, but it was definitely time to move on to something else.
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> **Beverley Corey**
> Financial Controller at RPC

Purchasing Paralysis

Purchase requisitions was also extremely problematic. The process started with a paper form that required physical signatures for approval that were tracked by the purchasing team on an Excel document. Each time an update was made to this Excel document, it would have to get entered through RPC's quality management system and the purchase requisition was often done in duplicate because the end user also kept a copy for their own records. The individual did not have visibility into the purchasing process. The requestor would need to contact purchasing to ask if a product had been ordered. The order for the product itself would take place but the purchase order number could not go into the system until it had been duly authorized and signed. This led to a lot of timing differences with many invoices getting generated for the product before the purchase order had even been entered into the system. It also prevented expediting orders because nothing was received until the invoice was posted.

Mapping Out a Better Future

RPC partnered with Catapult to streamline business processes and implement Dynamics NAV's successor solution, Dynamics 365 Business Central. Beverley said, "In truth, when I looked at the project and what needed to be done, I knew it was well suited to the qualities that Catapult had and could bring to the table."

The implementation of Business Central was no small task, in large part because of the need to replace functionality provided by numerous customizations to the original NAV system. Many of the customizations were undocumented and had been by people who no longer worked at RPC. Beverley emphasized the intense degree of alignment required to move the initiative forward:

> Catapult helped us streamline our business by listening to our needs and delivering scalable recommendations. Both companies delivered the right resources to help with the implementation and the large volumes data—which would have been too hard for either party to do alone.

Beverley Corey
Financial Controller at RPC

Once the scope of the project was defined, Catapult worked closely with RPC to orchestrate a mock-up "dry run" prior to launch. This mimicked the real thing by extracting data and uploading it into the new system. The dry-run allowed both parties to gauge how much time and energy a reimplementation this big would take and helped to redefine the process of doing it later. Training sessions on user testing were held for the whole organization and the Finance department received thorough hands-on training of the new cloud solution.

Over 100 jobs and a vast amount of data (all of which required correct mapping) had to be moved across to the new system. Customizations were retired in favour of standard functionality so that RPC would not have to continuously upgrade. There was a soft go live that started with timesheets followed shortly by purchase quotes, where everything was then moved from the old system.

> The relationship was strong because there was trust in both directions, meaning we got help when needed. It was kind of magical when I think about it.

Beverley Corey
Financial Controller at RPC

Accelerated Efficiency

With the new Dynamics 365 Business Central solution in place, timesheets are now done within Business Central which has led to an incredible surge in efficiency for the RPC team. Business Central has allowed them to save a significant amount of time (and paper!) on what used to be a laborious process back and forth in order to log data into the system.

The process and approval now happen in Business Central (admin review and payroll) and is tied together by creating exception reports for people who do not have the number of hours they should work in a week. The process is much more seamless now that they can enter the timesheets directly into Business Central and have the approval happen there, without multiple copies being made.

New, automated, and technology-enabled financial processes are producing significant gains in time and efficiency for RPC. The availability of a "Team" license type for Dynamics 365 Business Central, along with being cloud-based, means that all 170 RPC employees from across the organization can enter and review information right in the system. It has permitted RPC to move from a handwritten requisition to an automated workflow approval within the purchase quote system in Business Central.

The new process within Business Central facilitates expediting purchasing to payment process, because the expectation is that packing slips will be received into Business Central within three days of receiving orders. Accounts Payable are no longer having to spend their time photocopying invoices or sending physical copies to departments for signature.

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> People are no longer running around the building to get a signature for authorization and mistakes aren't being made!
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> **Beverley Corey**
> Financial Controller at RPC
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Happier Employees

RPC have seen an overall improvement in company culture due to the flexibility of Dynamics 365 Business Central. Prior to the implementation, employees had to be in the office to get their work done because of the manual nature of the job. They could not afford to miss a phone call, or a signature required for approval. With Business Central, they can work from home if they need because they can easily gain access to the system and do approvals on the phone or on the go. Beverley explained, "This is great because it allows our employees the freedom to work from home should they require—i.e. if a child is sick."

A general uplift in morale has been reported as people are no longer wasting their time on photocopying and data entry. Employees can focus on their roles and continue to progress their careers forward which Beverley reported as a hindrance prior to Business Central. As a not-for-profit, RPC's financial data is a key driver for merit pay and now they can set KPIs more efficiently and gather financial data through Business Central to help make informed decisions on behalf of their employees.

Advice for Companies Considering Business Central

Dedicated Resource

RPC feels strongly that having the right team is imperative when taking on a system implementation of this scale. This includes both the internal team and consulting resources. RPC specifically designated an internal subject-matter expert to run with this project full-time, which made a world of difference to the outcome.

> " Having a dedicated resource on this project meant that Catapult were able to work more effectively with the team to ensure that deadlines were met, and the project didn't come to a stand still.
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> **Beverley Corey**
> Financial Controller at RPC "

Base Functionality

A further piece of advice is to know when to adopt best practices embedded in the ERP system functionality versus when to bend the system to meet unique process requirements. At RPC, employees in engineering and analytics would request workarounds for customizations in the new Project Accounting module in Business Central.

> " As Jobs is currently our only revenue stream that lives in Business Central (the rest lives in our Lab Inventory Management System, LIM), it was important that we communicated to the team that the new business processes determine what they can do, and that it is not that we do not trust them as individuals.
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> **Beverley Corey**
> Financial Controller at RPC "

Partner Alignment

RPC's last piece of advice is that it is fundamental to the success of the project that you choose the right partner to help you get the right solutions with Business Central.

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> The core team at Catapult were always flexible and a great partner for us. We can't imagine a better team to have helped us get through it.
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> **Beverley Corey**
> Financial Controller at RPC
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Unify Your Business with Dynamics 365

Catapult is the #1 choice for midsized companies who are ready to digitally transform the way they do business. We offer a fully bundled, subscription-based service that delivers everything companies need to automate business processes and customer engagement with the Microsoft Dynamics 365 cloud platform.

Catapult delivers implementation, training, upgrades, managed services and support for a fixed-monthly fee. Whether you're looking for an all-in-one cloud-based accounting system or a powerful customer engagement solution, Catapult has you covered.

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