



Roytman
Information Services

Overview

Customer: Roytman Information Services
Countries: United States and Moldova
Headquarters: Dayton, OH
Industry: IT Career Placement Services and Consulting

Customer Profile

Roytman Information Services (“Roytman”) specializes in a full-range of Consulting and Career Placement services in the Information Technology industry.

Business Situation

Roytman used QuickBooks and a multitude of Excel spreadsheets to manage its internal accounting and payroll transactions. After implementing Microsoft Dynamics AX 2012, they standardized processes and procedures and now operate with a single view of the entire enterprise.

Solution

- Microsoft Dynamics AX:
 - Accounts Payable
 - Accounts Receivable
 - Cash and Bank Management
 - Commissions for AX (Future)
 - General Ledger
 - Human Resources
 - Payroll
 - Procurement and Sourcing
 - Project Management and Accounting
 - Sales and Marketing
 - Travel and Expense

Benefits

- Elimination of disparate systems and spreadsheets for a single source of the truth.
- Consolidation of the infrastructure into a single Microsoft solution.
- Standardized and improved business processes across the company.
- Reporting fully integrated with Microsoft Office.
- Expedited automated process workflows.
- Consolidated view of financials and project controls.
- Free automated tax updates.

Professional Service Organization Realizes Huge Returns from Process Automation in Microsoft Dynamics AX 2012

Business Needs

Roytman Information Services (“Roytman”) was founded in 1995 as a privately held global corporation specializing in a full-range of Consulting and Career Placement services in the Information Technology industry.



Since that time, the company has continued to grow and expand, including diversifying into other industries. Today, the total enterprise consists of five legal entities. Although the total employee count for the enterprise is fairly small, there are still a variety of complexities to manage. In addition to multiple companies, there are international operations, employees in several states, cross-company employees, various sales commission plans, multi-currency, international employee relocations, etc.

Situation

Throughout the growth of the Roytman enterprise, the business operations were managed through an older version of QuickBooks. Items like the payroll tax tables and forms in QuickBooks were not automatically updated. As a workaround, the accounting team manually calculated a lot of transactions in spreadsheets and then synchronized with QuickBooks.

Managing timesheets was also time-consuming. Once the staff submitted their hours and projects in a Word document, the rest of the process to review, code, approve, and coordinate with payroll was mostly manual.

Invoicing was also handled manually using data from the timekeeping spreadsheets and Microsoft Word.

In the end, QuickBooks simply became a repository for storing and reporting purposes, supplemented with silos of data in spreadsheets, Word documents, and filing cabinets. Although the overall process was manageable, it was cumbersome and inefficient, and there was an increased risk for inconsistencies and errors.

In addition, due to the absence of a single system to manage the overall enterprise, each company was managed as a single entity. This limitation meant management had a limited view of the overall organization.

“Switching over to the AX timekeeping system from our old paper system was a little hard because we hadn’t used AX before. But once we got in and started using it, it was love at first sight. It made our job so much easier.”

*Rebecca Scarberry
Office Manager*



It was increasingly evident the Company needed to replace their disparate systems with a single enterprise solution that would help them more efficiently manage the business, and provide a single source of the truth for well-informed decision making.

Selection Process

Based on Roytman’s experience with ERP implementations through its primary services, and the Dynamics AX expertise of one of its subsidiaries, Ellipse Solutions, Microsoft Dynamics AX was the clear choice for the company. Not only from a functionality standpoint, but also from a financial standpoint since project management and accounting and payroll modules were now included out-of-the-box and without an additional charge. This served to further extend the company’s overall Microsoft Dynamics AX ROI.

The management team knew Microsoft Dynamics AX offered the functionality they needed to support their business processes, and was cost effective in meeting their licensing and implementation budget. It also provided the ability to scale and handle the multiple entities with one technology stack and provide a single view of the entire Roytman Information Services enterprise.

They also believed Microsoft Dynamics AX’s user interface would be familiar and intuitive for their internal staff, making the implementation quicker and more seamless than switching to another system that would look and function so much different.

The Implementation Process

Roytman chose one of its subsidiary companies, Microsoft Dynamics AX Gold Partner Ellipse Solutions to implement their solution due to their experience within the Professional Services industry, as well as their long history of successfully working with Microsoft Dynamics AX. The implementation team included a Project Manager, Architect, Business Analysts and the support staff of Software Developers, Infrastructure and Database specialists. Each Business Analyst served as the subject matter expert for specific processes, such as payroll, A/R, A/P, project management, etc.

Due to the limited number of resources at Roytman dedicated to the implementation, a decision was made to follow a phased approach, which included:

- Phase 1 – Replacement of QuickBooks.
- Phase 2 – Additional transactional automation.
- Phase 3 – Advanced features.

With the phases identified, the first step for the implementation team was to evaluate and plan for the conversion following Microsoft’s best practices. This included evaluating the current processes to identify where processes were lacking and had to be addressed.

“Following a phased approach to the implementation allowed for a smoother transition without negatively affecting the daily operations.”

*Rebecca Scarberry
Office Manager*



“Working in the test environment helped us become comfortable with the system and more confident.”

*Alex Mokrycki
IT/Accounting Coordinator*

Next, implementation procedures were drafted, documented, developed, tested, and validated for each process. Roytman’s users were trained on how to configure the system, load data, and perform their functions. The training was conducted in a test environment by the Business Analysts so the users could become more familiar with Microsoft Dynamics AX before they started working in the live production system.

“Working in the test environment helped us become comfortable with the system and more confident,” said Alex Mokrycki, IT/Accounting Coordinator.

“Switching over to the AX timekeeping system from our old paper system was a little hard because we hadn’t used AX before,” said Office Manager, Rebecca Scarberry. “But once we got in and started using it, it was love at first sight. It made our job so much easier.”

Following a phased approach for the implementation allowed Roytman to manage the business with minimal disruption, as well as realize increases in efficiencies throughout the implementation process.

Although Phases 3 is yet to be implemented, Roytman has already achieved their main objectives:

- Implement a new solution to manage financials, project management and accounting, human resources maintenance and payroll operations.
- Automate internal processes to increase efficiencies.
- Setup internal procedures and the system to facilitate the company growth.

They are looking forward to achieving additional efficiencies and process improvements when the next phase is implemented.

Benefits of Microsoft Dynamics AX 2012

When they obtained Microsoft Dynamics AX 2012, Roytman expected to see improvements in automation, efficiency, and accuracy in their business processes. They didn’t realize how quickly this could be achieved. For example:

- **Accounting** – The data for all entities is now available in real-time and in one system. Previously, the Management team had to ask Accounting for the information. Now, the data is online and in a common format with options to view one entity or all entities combined. This allows for better informed management and decision making.

“Before we started using the Payroll function in AX 2012, it took almost 12 hours to complete payroll. Now, it takes 2-3 hours to complete the same process.”

*Alex Mokrycki
IT/Accounting Coordinator*



“Setting up the Greenshades service was simple and only took a few hours with minimal testing, which allowed for a quick turnaround to implement into our production environment”

*Rene Ernst
Business Analyst*

- **Payroll** – The once cumbersome and time-consuming process is now fully automated and more efficient. The integrity of the data and risks for human errors has also been minimized. “Before we started using the Payroll function in AX 2012, it took almost 12 hours to complete payroll,” said Alex Mokrycki, IT/Accounting Coordinator. “Now, it takes 2-3 hours to complete the same process.” That’s a huge savings in time for the Accounting Department that can now be allocated to other duties.

Ellipse Solutions took Roytman’s payroll process one step farther with the implementation of the payroll tax filing solution from Greenshades, a Microsoft Dynamics ISV. Greenshades’ solution provides easy and secure database integration to pull payroll data for filing Federal and State employee withholdings electronically. The integration requires minimal setup and provides electronic notification for acceptance of data from the Federal and State agencies.

“Setting up the Greenshades service was simple and only took a few hours with minimal testing, which allowed for a quick turnaround to implement into their production environment,” said Rene Ernst, Ellipse Solutions Business Analyst. Greenshades is the perfect complement to the AX 2012 Payroll process. It provided Roytman with a full solution that includes everything from employee payments to government filings for processing their internal payroll.

- **Human Resources** – The implemented components of the Human Resources module allowed the organization to lay the solid foundation for structured controls and automation of the HR rules and procedures, such as benefits eligibility, employee training management, recruiting, as well as other important features.
- **Project Management** - The biggest advantage realized in project management was in financial project controls and the timekeeping system. It’s easier for employees, as well as the Accounting Department. “The list of valid projects, activities, and categories is in the system. This prevents the employees from using invalid entries and means the Accounting Department no longer has to track down the data,” said Managing Partner, Jena Roytman.

Key improvements realized include:

- **Automated data tracking, analysis and reporting** – With all of the information in one system, data across the entire enterprise is now available in real-time for management review and more confident evaluation and decision making.
- **More timely and accurate financial management** – Previously, data could be pulled from QuickBooks for financial analysis and management, but it was a cumbersome and time-consuming process to complete. Today, the data is literally available at the push of a button, resulting in increased productivity and efficiency.

For More Information

Many enterprise resource planning (ERP) systems have never moved beyond managing the administration dimension of your business, tracking general ledger, payroll, and HR, while the real operation of the business is managed elsewhere. Microsoft Dynamics AX 2012 is different, covering both the administrative and operational requirements. To do this, Microsoft Dynamics AX 2012 delivers rich, prebuilt, industry-operational functionality out of the box, with proven functionality for manufacturing (process, discrete, and lean).

For more information about Microsoft Dynamics AX, go to:
<http://www.microsoft.com/en-us/dynamics/erp-ax-overview.aspx>.

- **Accuracy and data integrity improvements** – By eliminating the disparate systems that required manual data entry, the risk of human error and silos of data were virtually eliminated.
- **Increased productivity and cost savings** – During the implementation, processes such as payroll and timekeeping that were previously performed manually were automated within Microsoft Dynamics AX. This eliminated the need to input data into multiple systems, freeing up time and resources for more effective time allocation.

The Result

Microsoft Dynamics AX 2012 R2 is now implemented at Roytman Information Services. The architecture not only supports their current operations with improved business process efficiencies, it provides Management with a single view of the entire organization, strong reporting capabilities, and provides a real-time singular view of the enterprise's data for execution of daily operations.

“Every day we realize more benefits from our Microsoft Dynamics AX solution and are looking forward to realizing the value of additional modules and functionality, such as project forecasting and budgeting, automation of our help desk operations, and Commissions for AX,” said Managing Partner, Jena Roytman.

About Ellipse Solutions

Ellipse Solutions is a global Microsoft Dynamics AX Gold ERP Partner specializing in business solutions, software development, implementation consulting and help desk support for manufacturing, distribution, and professional service companies.

Their experience with ERP solutions dates back to the beginning of Axapta (now known as Microsoft Dynamics AX) as a product in the U.S. marketplace, and includes successful implementations and upgrades of all Microsoft Dynamics AX versions, releases and hotfixes. Ellipse Solutions team offers expertise in business operations, analysis, process reengineering, custom software development, software testing, implementation services, and maintenance/help desk support services.

For more information about Ellipse Solutions, call (937) 312-1547, email solutions@ellipsesolutions.com or visit www.ellipsesolutions.com.