Architecture Firm Strengthens Project Management with Integrated Solution

Overview

Country or Region: United States
Industry: Professional services—
Architecture, engineering, and related
services

Customer Profile

EwingCole is a premier architecture,
engineering, and design firm with over 300
employees that serves clients throughout
the United States.

Business Situation

When support for its Deltek Sema4 system
was discontinued, EwingCole needed to
find a new business management solution
that would help streamline workflows and
increase visibility.

Solution

The company worked with Microsoft® Gold
Certified Partner Computer Generated
Solutions to implement Microsoft
Dynamics® AX and integrate that system
with Microsoft Office SharePoint® Server
2007.

Benefits

- Greater control over cash flow
- Increased productivity
- Improved project performance tracking
- Solid technology foundation

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>
> Jim McAleer, Controller, EwingCole

EwingCole provides design, architectural, and engineering services to clients throughout the United States. When Deltek discontinued support for its Sema4 system, EwingCole evaluated options for a more modern business management solution that would help eliminate duplicate data entry and provide employees with direct, secure access to project accounting. EwingCole chose Microsoft Dynamics® AX over the new product from Deltek because of the seamless integration between the solution and other Microsoft® products and technologies, including Microsoft Office SharePoint® Server 2007. The company worked with Microsoft Gold Certified Partner Computer Generated Solutions to configure the system and build workflows to support unique business processes. Now, EwingCole employees have the information and tools they need to maximize cash flow, control project costs, and bolster profitability.

Situation

EwingCole is a nationally recognized architecture, engineering, and design firm with more than 300 employees located in four regional offices. In 2007, the firm brought in roughly U.S.$60 million in annual revenue. At any time, the company's 50 project managers handle roughly 450 projects, including the new Meadowlands Stadium, future home of the New York Giants and New York Jets.

As with other project-based firms, EwingCole is continually trying to improve its ability to manage time and expenses. "We sell the time of our architects, engineers, and designers," says Jim McAleer, Controller at EwingCole. "To gauge and manage our performance, we need to be able to get project details recorded and distributed to our project managers as soon as possible. Without this vigilance, even a small project that veers off track can become a big problem for our profitability." The numbers that EwingCole project managers must watch include overall

EwingCole designed Citizens Bank Park in Philadelphia.

profitability, what consultants are charging to the project, outstanding receivables, and updated budgets.

When EwingCole learned its project accounting software vendor was discontinuing support for its system, the company decided to evaluate its options for a new business management solution. "One of our guiding principles for the new solution was that information should only have to be entered once," says Beth Carroll, Database Administrator at EwingCole. With the existing system, employees in the accounting department frequently had to reenter data into the system, such as when creating new projects on behalf of project managers.

EwingCole also wanted to improve project managers' and executives' ability to access project accounting information. Project managers received static reports once a week and executives had to go to the accounting department to request custom reports. "To ensure the security of the system, we could not allow anyone outside the accounting department to access the database," explains McAleer.

Solution

After evaluating several options, including a newer solution from its existing software vendor, EwingCole chose Microsoft Dynamics® AX. The company was especially impressed with the solution's excellent project billing capabilities, reporting functions available through Microsoft® SQL Server®, and opportunities to empower project managers with online access to the system.

"With Microsoft Dynamics AX, we were able to address a lot of the requests that we could not with our old system. It's much more flexible," says Carroll. "By using Microsoft Office SharePoint® Server 2007 as the interface, we easily created a powerful solution that helps EwingCole employees

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complete critical tasks, like expense reporting, faster and make well-informed decisions."

EwingCole worked with Microsoft Gold Certified Partner Computer Generated Solutions to implement and configure the system to fit EwingCole's unique business processes, and create a customized portal for project managers and management. Built on Office SharePoint Server 2007 using HTML and standard Web parts from Enterprise Portal, the portal helps streamline a variety of tasks for project managers and other EwingCole employees who do not need direct access to the business management system.

The EwingCole Employee Portal provides easy access to a number of key resources and functions, including submitting expense reports and timesheets. In addition to tabs for employee services and project resources, a project management tab caters to the needs of project managers. Shown in Figure 1, the portal feature, called Project Wizard, lets project managers:

- Open, update, and close projects.
- Edit work orders.
- Create a request-for-proposal (RFP) project.
- Convert an RFP project into a live project.

EwingCole took advantage of the portal to streamline processes and ensure that employees only entered information once, wherever possible. Now, employees can enter expense reports and timesheets online, and the information will flow directly into the accounting system. And, when creating new project accounts, project managers can enter that information online and immediately route the form to the accounting department for approval. Previously, project managers created a draft spreadsheet and someone in the accounting department would create the project account in the system.

From the portal, project managers can also access a range of reports that pull up-to-date information from the accounting system, including:

- Accounts receivable aging reports showing outstanding receivables by customer and due date.
- Project burn-down reports showing progress and work left to be completed on a project.
- Project summary reports in overview, detailed, and for-print versions.

Figure 1. EwingCole built a project management portal that integrates with its project accounting system.
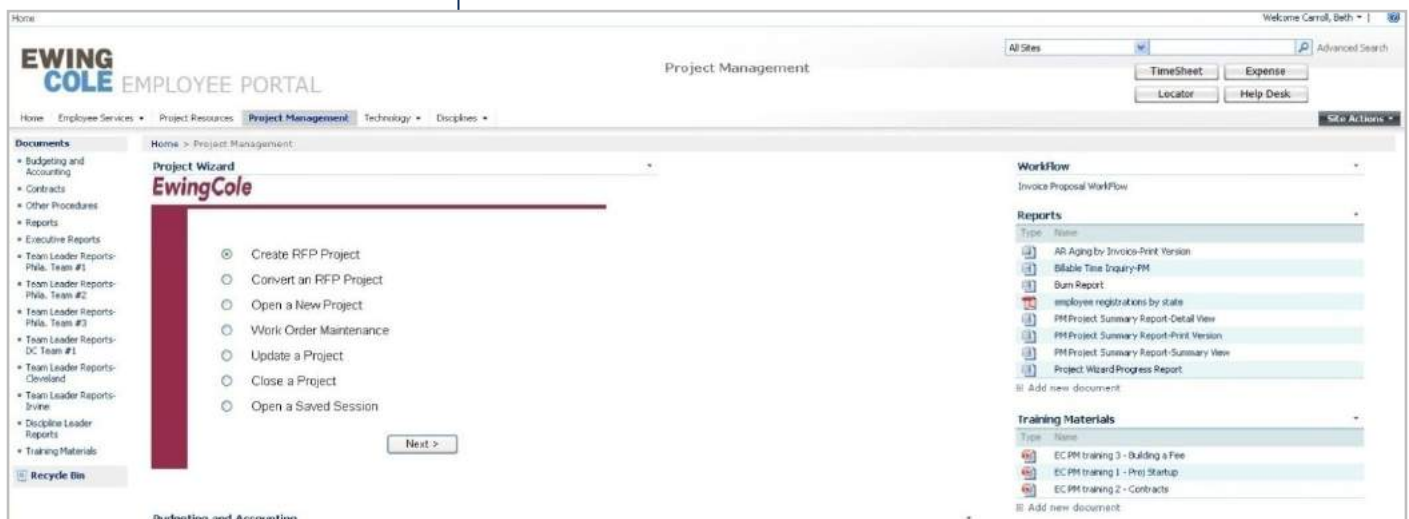
These reports provide project managers at EwingCole with much more timely project accounting information and the ability to act on that information. "Previously, when someone charged time against a project, the project manager wouldn't know of that until all the timesheets were entered at the end of the week," explains McAleer. "Now, project managers receive an alert when someone charges time against their project and can reject or move that charge to another project. In addition, they all can run reports themselves at any time and receive the most up-to-date information from the accounting system."

Benefits

EwingCole has improved core business processes so that employees spend less time on clerical tasks and make decisions based on the latest data. The new project management portals let managers enter information and access data themselves instead of working through the accounting department. And because these tools are integrated seamlessly with the project accounting system, updates are automatically reflected in self-service reports so that project managers and company executives have the insight they need to optimize business performance.

"Now, our project managers have the tools they need to improve cash flow and make projects more profitable," says McAleer. "At the same time, our people in the field and in the accounting department spend less time on routine data entry so that they can focus on their core responsibilities."

Greater Control over Cash Flow

With project accounting information and functionality available any time and any place, EwingCole project managers have greater control over cash flow. Managers now have insight into their most up-to-date project accounting in Microsoft Dynamics AX, and

they can see the impact of expenses on profitability through the solution's integration with Microsoft Office Excel® and Microsoft SQL Server Reporting Services. Managers also have the most current view of receivables so that they can pursue outstanding bills and improve cash flow.

"Previously, the information we provided to project managers often came too late and was static, so they couldn't easily see the implications of that information," says McAleer. "Now, with Microsoft Dynamics AX, our project managers are equipped to improve cash flow and control costs. These capabilities are critical to keeping the firm vibrant and healthy in the current economic environment."

Executive management at EwingCole uses the increased visibility into operations and accounting to better manage the business. "Our Director of Operations has been the most enthusiastic about the reporting and project management capabilities available online," says McAleer.

Access to historical and the most recent information helps managers verify expenses and time spent on projects in any office or team. "The system allows us to review custom reports and find specific information quickly and efficiently," says Jared Loos, Director of Operations at EwingCole. "We are able to look up information on older projects for comparative purposes as well as track new data in a more consistent and meaningful way. Having real-time access to critical data is crucial in today's economic climate."

Increased Productivity

With the new system, EwingCole has made progress in its goal of eliminating duplicate data entry. Instead of submitting timesheets, expense forms, and new project requests to the accounting department to enter into the

system—as was required with the previous system—employees now can enter that information themselves online. In addition, employees spend less time in back-and-forth communication because EwingCole took advantage of built-in workflow technology to automate notifications and requests for approval.

"With our new Project Wizard system, we can create a budget for a new project in just one-tenth of the time it took us previously. Microsoft Dynamics AX and Office SharePoint Server 2007 work together to eliminate many of the inefficiencies in our processes so that people can focus on tasks that add value to the business," says McAleer.

EwingCole continues to investigate opportunities to further streamline workflows for its employees, such as distributing draft invoices to project managers electronically so that they can more quickly view and approve them.

For its accounting department, EwingCole has alleviated the burden of having to create as-needed reports for management. "We spent at least four hours each week helping management find the information they needed," says McAleer. "Now, executives have immediate access to dynamic reports that we set up for them. That saves us time and provides management with improved access to information."

Improved Project Performance Tracking

As an architecture, engineering, and design firm working on extremely sophisticated projects, EwingCole has very specific requirements in how it bills work orders to projects. This specificity helps EwingCole carefully track the performance of its projects in regards to costs—and is critical in preserving profitability for project-oriented firms.

"One of the challenges with our previous system was that it had limited billing capability, which meant that we often lacked deep insight into our project expenses," says McAleer. "In contrast, the solution's billing capability is fantastic and one of the greatest strengths of the system for architecture and engineering firms like us. Now, we can bill work orders to projects exactly how we track them. We can bill two work orders together, a subgroup of work orders together, or an entire project together. There's a great deal of flexibility that helps us better monitor project costs."

Solid Technology Foundation

After switching from a system that was discontinued by its vendor, EwingCole appreciates the stability of its new management solution from Microsoft, which benefits from ongoing investment to strengthen the product. EwingCole continues to investigate opportunities to build on Microsoft Dynamics AX. For example, the company is investigating Microsoft Dynamics CRM for its sales teams, which would work together with its business management system.

"One of the primary strengths of the solution is that it builds on a solid portfolio of other Microsoft products and technologies," says McAleer. "For example, having our business management solution take advantage of single sign-on through Active Directory® lets us grant managers throughout the company access to vital business information without compromising security. I feel confident knowing that we have access to the latest technology from Microsoft—we do not have to worry about being left behind."

EwingCole intends to take full advantage of the smooth integration between Microsoft Dynamics AX and other business technology from Microsoft. "Together, Microsoft Dynamics AX and Office SharePoint Server

For More Information

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www.ewingcole.com

For more information about Computer Generated Solutions products and services, call (800) 247-0684 or visit the Web site at:
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2007 offer us virtually limitless possibilities," says Carroll. "Right now, we're targeting the projects with the biggest payback, like integration with project accounting. Going forward, we plan on launching team sites for internal and external stakeholders to share photos, drawings, and documentation. In contrast, many other architecture and engineering firms that use other project management systems would like to implement Office SharePoint Server 2007, but have a hard time doing that because of technology integration issues."

Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems that your company already has implemented. By automating and streamlining financial, customer relationship, and supply chain processes, Microsoft Dynamics brings together people, processes, and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

For more information about Microsoft Dynamics, go to:
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