



## Microsoft Dynamics Customer Solution Case Study



### Overview

**Country or Region:** United States

**Industry:** Government

### Customer Profile

With approximately 110 employees, the government of the Village of Pinehurst, North Carolina, serves its 10,200 residents and administers every aspect of municipal finances.

### Business Situation

For general ledger management, the village's finance department relied on a legacy application that was outdated and too rudimentary to support many required functions.

### Solution

Working with Microsoft® Business Solutions and IDS Scheer SME, the village deployed Microsoft Business Solutions–Great Plains®, which supports all required functions within a single system.

### Benefits

- One integrated solution for all financial functions
- Enhanced access to financial data
- Off-the-shelf capabilities ease maintenance and updating
- Ability to extend advanced functionality to other government areas
- Improved constituent and employee services

## Village Government Unifies Financial Management within a Single Solution

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*Natalie Dean, Assistant Village Manager, Village of Pinehurst, North Carolina*

At the offices of the Village of Pinehurst, North Carolina, the finance department is responsible for preparing and tracking financial plans, such as budgets, capital improvements, and financial projections. With a new Microsoft® Business Solutions–Great Plains® (now part of Microsoft Dynamics™) solution implemented by IDS Scheer, a Microsoft Gold Certified Partner, the finance department now administers financial operations using a single, automated, and integrated system, which has dramatically improved the village's control over financial activities with enhanced reporting abilities, as well as greater accuracy and efficiency.



“A big positive is the fact that our Great Plains software is so flexible that we can perform all of our government functions while keeping it as off-the-shelf as possible.”

Becky Jensen, Financial Analyst, Village of Pinehurst, North Carolina

## Situation

In 2004, the municipal government of the Village of Pinehurst, North Carolina, planned to purchase a local water and sewer utility operation. As a result, the finance department needed to implement a billing system for the utility’s customers. “We knew that we would need to start billing our customers. However, the accounting software we had at the time didn’t have an invoicing functionality,” recalls Natalie Dean, Assistant Village Manager.

For years, the finance department’s staff had relied on a legacy application that was not only cumbersome to use, but lacked the functionality to support many of the department’s data processing and analysis needs. Consequently, the department had developed a separate system of records and reports using Microsoft® Office Excel spreadsheets that were manually maintained. “We were doing invoicing, account balance management, aging—all of that in Excel. Our old system could not do any of those things,” Dean recalls.

Their legacy application also could not fulfill the department’s reporting requirements, so many of its quarterly and yearly reports had to be produced outside the system entirely by hand. “We couldn’t customize reports. We only had some very basic, canned reports that were not very detailed,” Dean adds. “We also didn’t have the ability to easily research deeper into the information like you can with Great Plains. All we had was a financial statement with four columns and that was it.”

Furthermore, the legacy general ledger system could only maintain two years of financial history, Dean points out. “If you needed more history than that, you had to look through these 2,000-page trial balances that we printed each year and kept on shelves. You can imagine how long that took.”

Finally, the village wanted a system that would run on Microsoft Windows® operating system with the rest of its software. “Our vendors were working to make that old software run on Windows, but it was really going to be just a Windows-based front end,” Dean explains. “We wanted to implement a true Windows-based solution.”

## Solution

Working with Microsoft Business Solutions and IDS Scheer Small and Medium Enterprises, the village’s finance department rolled out its new Microsoft Business Solutions–Great Plains® software in July 2004. Now, every transaction—every dollar spent or collected by the village government—is tracked within a single unified environment.

With a back-end database running on Microsoft SQL Server™ 2000 Enterprise Edition, the village’s new solution maintains all financial data within a single repository. This represents a major improvement, Dean explains, because it allows staff to manage data and perform all of their tasks directly through the Microsoft Great Plains software, instead of relying on separate, ad-hoc records that were maintained manually on Microsoft Office Excel spreadsheets.

“Now, we have one place to look at for all our information,” she says. “If we want to know whether a purchase order was issued for a particular vendor, we can go online and find that information much more easily than before. With our old system, we had to constantly pull data from different spreadsheets and put it all together by hand. With Microsoft Great Plains, we work with only one data source. And it’s intuitively easy to use.”

“We’ve made a great start in the finance department, and this software will definitely allow us to deploy new functionality to many other parts of the village government.”

Natalie Dean, Assistant Village Manager,  
Village of Pinehurst, North Carolina

Unlike its legacy system, the village’s new Great Plains solution allows users to navigate freely from one data item to another without having to change application screens. This capability makes Microsoft Great Plains dramatically easier to use. For example, users viewing a particular check can use on-screen menus to pull up the invoice or general ledger posting for that check.

“As a user, you can’t tell that you’re moving from one module to another, because you’re just looking at related, underlying information within the one system,” explains Becky Jensen, a Financial Analyst at the Village of Pinehurst. “On our old system, navigating through information like that meant having to close one screen and open another. It was very time consuming to look for the data that you needed.”

In addition to serving as the village’s core financial environment, Great Plains also incorporates an array of functions designed specifically for government agencies and other public-sector organizations, which manage functions such as fund management, grant management, budgeting, encumbrance accounting, and others. Thus, by taking advantage of the mix of government-specific components within Great Plains to meet different functional requirements, the village has been able to cost-effectively implement an integrated enterprise resource planning solution to run practically every aspect of its financial operations.

To complement the strong functionality of Great Plains, IDS Scheer was also able to provide customized features for the village. One such specialized function allows the finance department to track and document budget amendments as they occur during the year.

“As our budget gets changed, we need some way for our auditors to track those budget amendments, and make sure that they were approved by the elected board, as appropriate, and in accordance with the budget ordinance that our council adopts,” Dean explains. “IDS Scheer was able to create a script to maintain that audit trail for us, so that during our encumbrance process when we’re trying to draw purchase orders, we can easily see when and how our budget was amended. That’s probably the most customization that we’ve had so far, but I think from a local government standpoint, that’s absolutely critical.”

## Benefits

By allowing the finance department staff to monitor financial data more easily and with more detail, the new system’s ease of navigation not only boosts productivity, but also enhances the accuracy of the village’s financial records. The ability to easily review all background data for a particular check, for example, helps the finance department to monitor disbursements more closely and even pinpoint opportunities where spending could be optimized.

Another advantage of the new Microsoft Great Plains software is that it required very little customization to meet the village’s specialized government requirements. The village was able to easily take advantage of Great Plains functionality that has been designed specifically for city governments and other public-sector/not-for-profit organizations, such as Interfund Accounting, which enables agencies to keep multiple funds balanced continuously and automatically, Encumbrance Management for monitoring purchases that will be made for each fund, and Grant Management to improve accountability of specific granted funds.

## For More Information

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For more information about IDS Scheer products and services, call (800) 810-2747 or visit the Web site at: [www.ids-scheer.com/sme](http://www.ids-scheer.com/sme)

For more information about Village of Pinehurst, North Carolina products and services, call (910) 295-1900 or visit the Web site at: [www.villageofpinehurst.org](http://www.villageofpinehurst.org)

Avoiding customized features means that IT staff won't need to redevelop them—or at least retest them—every time a new upgrade is released for other elements of the system. “We tried very hard not to customize this system, because the more you customize an off-the-shelf product, the more expensive it becomes,” Jensen explains. “We want to be able to easily keep up with any upgrades as they come out, and customization gets in the way of that. A big positive is the fact that our Great Plains software is so flexible that we can perform all of our government functions while keeping it as off-the-shelf as possible.”

The village began by deploying Microsoft Great Plains within its finance department, but as time goes on, the government will be able to extend the solution's functionality to other parts of their enterprise, notes Dean. Those areas where the Microsoft Great Plains software could potentially integrate to help streamline business processes and boost productivity include human resources, licensing and permitting, and vehicle maintenance.

“We want to leverage the technology that we purchased. Our providers are helping us to do that in a number of ways,” she says. “We've made a great start in the finance department, and this software will definitely allow us to deploy new functionality to many other parts of the village government.”

## 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 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: [www.microsoft.com/dynamics](http://www.microsoft.com/dynamics)



### Software and Services

- Microsoft Dynamics
  - Microsoft Business Solutions - Great Plains version 7.5
- Microsoft Windows Server System
  - Microsoft SQL Server 2000 Enterprise Edition

### Hardware

- Dell PowerEdge 2600 (2.8 GHz/512 KB)
- 1 GB DDR SDRAM 266 MHZ (4x256 MB)
- 36 GB 10,000 RPM Ultra 320 SCSI Hard Drive

### Partners

- IDS Scheer SME

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Document published February 2005

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