

PHYLOS, INC.

Solution Overview

Industry

Biopharmaceutical Research and Development

Microsoft Great Plains Business Solutions Partner

DataSys Corporation

Scenario

Phylos needed a customizable purchase requisition system that was easy for scientists to learn and that integrated seamlessly with Microsoft Great Plains Dynamics.

Company Profile

Phylos uses its cutting-edge drug discovery platform to develop products for improving human health.

Benefits

With a custom Web-based requisition program created with Microsoft SQL Server and the Microsoft Great Plains Dynamics Integration Manager, purchase requisition data integrates seamlessly into the Dynamics purchase order module, reducing data entry time, increasing purchase efficiency, and providing an integrated data loop for tracking transactions.

Software Used

Microsoft Great Plains Dynamics
 Financial Series
 Distribution Series
 General Ledger
 Payables Management
 Receivables Management
 Bank Req
 FRx
 POP
 Integration Manager

Microsoft SQL Server

Demographic Information

Annual Revenue: \$6.2 million USD
 Number of Employees: 105
 Number of Users: 5
 Number of Sites: 2

Transaction Volume: The company processes approximately 500 different items each month; the different items drive the number of requisitions, purchase orders, receipts and invoices.

Migrated from Quickbooks and a Microsoft Excel-based custom requisition program

With more than 70 scientists requisitioning hundreds of different materials every day, Phylos needed a purchase requisition program that integrated seamlessly with the company's new Microsoft Great Plains Dynamics business management application. Microsoft SQL Server and Dynamics technology yielded a custom Web-based solution that requires little training and promises to pay for itself.

Formed in 1997, Phylos is a biopharmaceutical company focused on using its cutting-edge drug discovery platform to develop novel products for improving human health. The company now has operations in the United States and Europe, with an outstanding team of more than 100 scientists, management, and support personnel.

As part of a long-term business strategy, Phylos migrated from a QuickBooks accounting system to the more robust Dynamics suite. The company also needed to transform its Microsoft Excel-based purchase requisitioning program so that requisitions, order management, and accounting worked together seamlessly. The challenge for Phylos and Microsoft Great Plains Business Solutions partner DataSys Corporation: create a solution that would provide optimal ease of use for scientists, with full integration with Dynamics— at minimal cost.

Wanted: Ease of Use and Integration

The requisition solution was needed by the Phylos staff of scientists for frequent purchasing of a wide array of materials for projects. "Our initial goal was to create an integrated system that would provide the necessary information to purchasing and accounting, with little impact on the requisitioners (scientists)," says Christine Clinton, Phylos controller. Meeting that goal meant that the requisition solution needed to mimic the Excel-based program but provide easier use, and become a more robust solution that fully integrated with Dynamics. The solution also had to support both Macintosh and PC Web browsers.

Easier to Use—and More

In response, DataSys designed a Web-based program that allows users to requisition materials with a template similar to the Excel program. The requisition is then submitted to the purchaser, consolidated, modified as necessary, and integrated into Dynamics using Integration Manager's SQL Optimized Object for Purchase Orders. Customized reports allow the receiver to determine which scientist should get the delivery. A daily receiving report is also created and posted on the Phylos intranet to allow scientists to quickly see each day's deliveries.

In addition, the new program allows sorting of individual line items by numerous categories, such as due date, suggested vendor, or item number, thereby maximizing purchasing efficiencies. Scientists can review previous orders, convert old requisitions into

new ones or build new requisitions by selecting individual items from a history report by vendor. The added functionality allows scientists to save time when placing re-orders minimizing data entry and the time required to look up catalog numbers, prices, and other information.

A Solution that Makes Everyone Happy

Phylos also needed to be able to track costs on a project and program basis and submit periodic financial reports. Working with DataSys, the company took advantage of the flexibility of Dynamics and created a general ledger account structure to support those reporting requirements. The data entry and integration functionality also gave scientists an easy way to code their purchases to the appropriate account number. The scientists enter a project code and the integration associates that code with the appropriate general ledger account number. This eliminates the need for the accounting staff to manually code the purchases, hiding the complexity of accounting from the scientists.

Key: Affordable and Easily Customizable

Although Anne Baia, vice president of finance and administration, saw the need for an integrated system shortly after Phylos was launched in 1997, she thought that a Microsoft Great Plains solution would be too costly and complicated. Four years later, as the company matured and technology advanced, a flexible solution at the right price was found using SQL Server with Integration Manager.

“Over the past few years, Microsoft Great Plains has increasingly become the standard for emerging life science companies such as Phylos,” Baia says. “However, using the Microsoft Great Plains requisitioning module would have required Microsoft Great Plains eEnterprise user licensing, which would have made the project cost prohibitive for Phylos, and we would have had to customize that requisition to fit our specific needs. The customized, Web-based application changed that and became the means for realizing our vision. “

Return on Investment

One welcome surprise: the integrated requisition and accounting program has worked so well that it was adopted for the weekly stockroom inventory ordering for several departments, in addition to individual and departmental ordering.

As far as savings of time and money go: “We estimate that the time savings alone in being able to track items ordered and deliver them to the appropriate scientist or location will pay for the software program in less than one year,” says Clinton. “In addition, the efficiencies gained in purchasing have allowed us to increase the number of scientists by more than 40%, without needing to hire another purchaser.” For Phylos, that means the company found the best solution on the market.

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