

RSM accelerates complex Dynamics 365 implementation for Tyler Technologies

Industry-tailored advice brings advanced reporting and decision making

To deliver maximum value, technology solutions must be modern, properly integrated and aligned to specific industry demands. Any misalignment can pose significant challenges to overall efficiency and productivity within a business. This is especially true for larger enterprises, which may struggle with limited visibility across the organization and, consequently, experience difficulties with reporting and decision making.

Headquartered in Plano, Texas, Tyler Technologies is a leading provider of integrated software and technology solutions to the public sector, delivering innovative services to entities ranging from small rural counties and metropolitan cities to federal agencies and school districts. With over 7,000 employees and 40 locations across the U.S., Tyler is dedicated to empowering the public sector with transformative technology and comprehensive support, inspiring long-term operational success and better outcomes for residents.

Implementing an integrated technology strategy

Tyler is committed to continuous improvement through their "One Tyler" initiative aimed at consolidating foundational technology systems across their organization, streamlining operations, promoting greater efficiency and establishing a single source of truth across the business. The initial phase of the project culminated with Tyler's corporate division

successfully implementing Microsoft Dynamics 365 Finance and Supply Chain Management (D365 F&SC) with support from RSM US LLP. For the second phase, the company focused on working with RSM to extend D365 F&SC to their Platform Solutions Division (PSD), which provides comprehensive software solutions to streamline operations for federal and state governments.

PSD was still operating on a Microsoft Dynamics SL enterprise resource planning (ERP) system, limiting leadership's visibility into operations and transactions. In addition, the system required manual processes to flow data for functions such as client invoicing, accounts receivable, labor distribution and reporting. Tyler's commitment to streamlining processes included establishing a single source of truth under one ERP.

"Our primary goals for the D365 F&SC implementation within the PSD were to continue consolidating and streamlining technology under our 'One Tyler' vision and to transition from Dynamics SL, which was going out of service," says Tyler PSD Controller Michelle Palmer.



Accelerating value creation

RSM initially conducted a deep review of PSD's business processes and then determined how to translate them into D365 F&SC to make them more efficient. This discovery process enabled RSM and Tyler to align on scope, resource needs and timeline. United in working toward a common goal, few scope changes occurred because of the effort made and details defined up front.

The teams leveraged the RSM GovCon Accelerator, which provides tools and features to support the unique needs of organizations serving the public sector, delivering an efficient and compliant platform.

"We all ran in the same direction with little distraction," says RSM Director Mathias Quandt. "The GovCon Accelerator has provided a significant number of features that D365 F&SC does not provide outside of the box, and it has enabled Tyler to stick with a shortened timeline and reduce customizations, simplifying the implementation."

Palmer also emphasized the benefits of the GovCon Accelerator. "We can automate the running of recurring revenue, which previously took a second setup," she says. "In addition, timesheet corrections can be handled by individuals with no specific interface for timekeeping and we have more visibility into financial dimensions in the general ledger."

The assessment also determined that PSD manages contracts involving controlled unclassified information (CUI). Therefore, measures were implemented to mask CUI data so that no sensitive information would transfer from the secure enclave into D365 F&SC. By collaborating with RSM's cybersecurity team, Tyler established an approach that complied with government regulations and standards.

We all ran in the same direction with little distraction. The GovCon Accelerator has provided a significant number of features that D365 F&SC does not provide outside of the box, and it has enabled Tyler to stick with a shortened timeline and reduce customizations, simplifying the implementation.

Mathias Quandt, Director, RSM US LLP

Keys to successful implementation

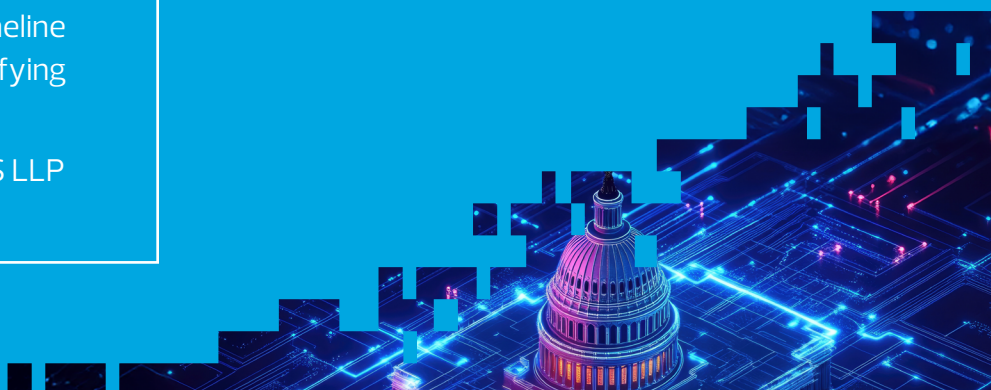
With their mutual deep experience in and appreciation for complex technology implementations, Tyler and RSM were committed to achieving a high level of coordination and success.

"Tyler does software implementations as a company—with that, they have vast knowledge and a very strong user base for how these projects are run," says RSM Manager Erica Periolat. "In addition, they have a strong finance team that is very capable. With those factors, the bar is set really high for the resources we bring in. Our experience and our best practices approach—along with our very open, collaborative and highly consultative relationship with Tyler—have been critical to this project's success."

In addition to RSM's deep technical and government contracting experience, several factors strengthened the D365 F&SC implementation process for the PSD team. Tyler dedicated full-time staff to the project, and the company and RSM took a one-team approach, maintaining open lines of communication, detailing project progress and decisions, and providing frequent and detailed status reports to align both parties on key milestones and upcoming tasks. These processes increased efficiency and confirmed the project was delivering its intended outcomes.

We can automate the running of recurring revenue, which previously took a second setup. In addition, timesheet corrections can be handled by individuals with no specific interface for timekeeping and we have more visibility into financial dimensions in the general ledger.

Michelle Palmer, Tyler Technologies Platform Solutions Division Controller



Of course, every project can face unexpected challenges—and the Tyler and RSM teams worked closely to quickly identify and address them. When the project encountered obstacles or identified evolving business needs, the teams collaborated to pivot and redirect efforts as needed. By addressing issues early and establishing a flexible implementation approach, the teams minimized disruptions and kept the project on course.

Transforming efficiency, integration and compliance

The RSM and Tyler teams successfully met the goals for the PSD D365 F&SC project, taking the next step toward unifying key processes into one ERP solution and moving Tyler closer to achieving the One Tyler vision. With a modern, aligned ERP solution in place, Tyler has eliminated dual entries and several manual processes—strengthening contract project management while enhancing compliance with the Federal Acquisition Regulation (FAR) and Cost Accounting Standards (CAS) and maintaining compliance with the Defense Contract Audit Agency (DCAA).

Experience the RSM difference

Ready to elevate your efficiency and insight while strengthening reporting and compliance? RSM's comprehensive Microsoft solutions for government contractors deliver the visibility and data you need to make better decisions and address evolving business challenges.

Contact our team to learn more.

+1 800 274 3978

rsmus.com

This document contains general information, may be based on authorities that are subject to change, and is not a substitute for professional advice or services. This document does not constitute assurance, tax, consulting, business, financial, investment, legal or other professional advice, and you should consult a qualified professional advisor before taking any action based on the information herein. RSM US LLP, its affiliates and related entities are not responsible for any loss resulting from or relating to reliance on this document by any person. Internal Revenue Service rules require us to inform you that this communication may be deemed a solicitation to provide tax services. This communication is being sent to individuals who have subscribed to receive it or who we believe would have an interest in the topics discussed. RSM US LLP is a limited liability partnership and the U.S. member firm of RSM International, a global network of independent assurance, tax and consulting firms. The member firms of RSM International collaborate to provide services to global clients, but are separate and distinct legal entities that cannot obligate each other. Each member firm is responsible only for its own acts and omissions, and not those of any other party. Visit rsmus.com/aboutus for more information regarding RSM US LLP and RSM International. RSM, the RSM logo and the power of being understood are registered trademarks of RSM International Association.