



CLIENT SOLUTION CASE STUDY

# JG Management Systems Finds Efficiencies in the Cloud with Microsoft Dynamics 365 Business Central and Progressus

MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

## Background

The J.G. Management Systems (JGMS) team works shoulder-to-shoulder with some of the world’s most respected government organizations such as Department of Energy, Department of Commerce, Department of Homeland Security, Department of Defense, Department of the Interior, Department of Agriculture—and excels at tackling the most difficult projects. A national award-winning firm, JGMS has over 20 years of experience and a project portfolio that spans the nation. They strive to provide clients with more innovative and sustainable ways to achieve their goals.



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A long-time user of Microsoft Dynamics SL, JGMS knew it was time to upgrade to a more robust, end-to-end system to manage federal and state projects. The team at JGMS wanted to leverage cloud technology, improve system benefits, and integrate payroll. Velosio supported SL at JGMS for many years through several versions of the system - 2007, 2011, and 2015.

Velosio recommended JGMS upgrade to Microsoft Dynamics 365 Business Central, along with Progressus Project Accounting. JGMS also selected Payroll NOW from Integrity Data to keep payroll management in-house. “This was my third big implementation,” says Kim Kelley, senior financial advisor for JGMS. “We started on QuickBooks and upgraded to Deltek, then moved from Deltek to Microsoft Dynamics SL. And now we’ve upgraded SL to Microsoft Dynamics 365 Business Central (BC) with Progressus. Once learned, this system is the easiest to use on the projects (Progressus) side,” continues Kelley.

## OVERVIEW

### Software Solutions:

- Dynamics 365 Business Central
- Progressus Project Accounting

### Challenges:

- Manual Processes
- Disconnected Systems
- Insight Constraints

### Benefits:

- Better Project Management
- Improved Efficiencies

### Company Overview:

J.G. Management Systems, Inc. provides applied engineering, applied science, applied technology, and management services to some of the world’s most distinguished private and public organizations.

**Industry:** Professional Services

**Employees:** 93

**Headquarters:** Grand Junction, CO

**Annual Revenue:** \$17.7M+

## Implementation

After implementation, JGMS has six accounting team members who use the system daily or weekly. 100 total employees enter and submit their timesheets on a weekly basis in the system. Subcontractors submit monthly invoices to JGMS Accounting who then enters the information into the system.

During the implementation, JGMS did have challenges with its payroll process based on unique requirements. “We have a few employees that have alternate work schedules,” says Kelley. “They work from noon on Friday to 11:59 am the following Friday. The system couldn’t account for that split in the day because each timesheet would need to have eight days on it instead of seven. Now, the employees enter their time in Excel and email it to us. We enter their time directly into the time journal. We did the same thing in SL so it’s not a huge deal, but we were hoping to get away from it in BC,” continues Kelley. JGMS continues to work to streamline more of the processes between Progressus and Integrity Data Payroll NOW/HR Now.

## Ease of Use

JGMS is taking advantage of the integration of Microsoft Dynamics 365 BC with Progressus. “We use the [Progressus] system daily, and I personally think it’s easy to use,” says Kelley. “Sales invoices are much faster than SL, and timesheets and approvals are pretty simple. I love invoice suggestions; it makes the invoicing process go very quickly. Getting in and out of timesheets and expense sheets are easy, as well as entering the time and expenses. The project wizard used in conjunction with the project/task templates is a game changer.

What used to take about 30 minutes now takes just five. There are a few fields I would add to the wizard but still love it,” adds Kelley. Using the project wizard, which has a lot of information auto-populated, means there are also fewer mistakes made when setting up a new project. “In the past, if the team didn’t have the best notes, or if instructions on project setup weren’t followed, there were errors, which created a lot of clean-up work afterwards, but project entry is now much more accurate,” says Kelley.

“Printing sales invoices is way faster than in SL,” says Kelley. “Overall, our work is more efficient,” says Kelley. “We are still learning and trying to get our processes down, but I think overall we have seen efficiencies and the more we use it the better it will be.” Kelley reports on some growing pains in the new system but is honored to be a part of the Progressus Customer Advisory Committee to provide feedback to the team. “I’ve never had the opportunity to give feedback to our software providers, although I had feedback to give,” laughs Kelley. “They are actually listening to my feedback and working on the tweaks that I’ve suggested. It’s great,” continues Kelley.

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- Kim Kelley

Senior Financial Advisor

JGMS

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## System Support

JGMS reports that it has always received great support from the Velosio team. “When we had SL, I would email my favorite person at Velosio, and she would find an answer for me,” says Kelley. “She was always great and friendly, and we actually became friends.” For the upgrade to BC and Progressus, JGMS had a positive experience with the implementation team. “Our implementation team was awesome,” says Kelley. “We spent hours on the phone together, and they were very knowledgeable. I can still email them with questions, and they help right away. They track system updates and give me a heads up if it will affect something I’m doing in the system. Another consultant helped with our custom reports, and he was great – really responsive and quick. He let us know when the reports were ready for testing, and they were pretty perfect. He customized some sales invoices for us and wrote an aged AR report. When I put in a request for an additional field on the screen, the consultants are quick to comply. For example, we needed to build a bridge between resource cost and resource price. They created that bridge in the form of a new screen called the ‘timesheet work type setup list’ and it works perfectly,” continues Kelley.

## Cloud Benefits

By moving its system to the cloud, JGMS reports that the system is easier to use. “I like having the ability to open multiple tabs for the same company and show

them on different screens – everyone on the team likes that,” says Kelley. “The auto-updates are working well – we haven’t run into trouble with that. It’s great to be able to access the system from anywhere, and the autosave feature is nice,” continues Kelley. The cloud has also reduced the time it takes to back up the system and provides a secure data environment for the heavily regulated government contractors.

Next up for the system, JGMS is looking at Microsoft Dynamics 365 Customer Engagement for bids and proposals. The team also wants to start creating reports in Power BI.

“We initially looked at budgeting through Solver, but pushed that project out to Phase 2,” says Kelley. “We plan on picking up that project again.”

## System Benefits

“The new system checks all the boxes for us, and I would be very likely to recommend BC and Progressus to a colleague,” says Kelley. Key system benefits include:

- Integrated ERP, Projects, and Payroll system
- Reduced manual, error-prone processes
- Improved efficiency
- 83% reduction in the time to enter new projects
- Quicker sales invoicing
- Easy user interface
- Flexible Cloud solution accessible from any device, with automatic updates

 Discover how Velosio can help your business with Microsoft Dynamics 365 business applications.

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