

# Steering digital transformation goals for the City of Columbus



## Hurdles that complicated government processes

The City of Columbus (the City) in Ohio, U.S. is the nation's 14<sup>th</sup>-most populous city. It has around 600 finance users, 40 Point of Sale users, and 7,000 vendors utilizing its system. The City was facing slow system performance due to limited analytics, many customizations, and high dependencies on 3rd-party solutions.

In 2019, the City chose OnActuate as its digital transformation partner. In less than 16 months, it upgraded from Microsoft Dynamics AX 2012 R3 to Dynamics 365 for Finance & Operations (D365FO) and implemented our Cashiering and Vendor Collaboration solutions. This migration led the City to greater flexibility, better quality service, and improved decision-making.

Cheryl Reed is the City's Dynamics Solution Manager. When speaking about OnActuate, Cheryl said: *"OnActuate's collaborative nature with us as the customer exceeded our expectations. The OnActuate team was willing to go and beyond to troubleshoot and resolve issues, and to fully meet the City's requirements. We were in continuous communication with OnActuate team members, which aided in moving multiple work efforts forward concurrently. OnActuate continued to work through the pandemic remotely to keep the project moving forward. We were able to implement D365 for the 14th largest city in the United States while team members across the globe also dealt with a pandemic!"*

## Streamlining operations to improve service quality

As the fastest-growing metropolitan area in the Midwest, the City needed to run with operational excellence. Yet it was facing business challenges that impacted efficiencies. We created a clear set of objectives to meet the City's business-critical requirements, including:

- Improve overall system performance and response time, especially for reporting and procurement
- Utilize out-of-the-box D365 Public Sector functionality to limit 3rd-party solution dependencies and reduce customizations
- Leverage task recordings for user training and documentation

Our services positioned the City for growth and agile response to change through:

- A roadmap to an integrated system that allows for flexibility to meet the City's needs and supports operational and strategic goals
- A modern, transparent, and intuitive Vendor Collaboration portal and Cashiering solution that substantially improve the quality of service provided to citizens, vendors, and City end-users, management, and decision-makers
- Better decision-making organization-wide by analyzing and sharing reporting data through Power BI

### **Designing solutions that leverage Microsoft technologies**

Using Microsoft Business Applications in our services and solutions enables transformations from a technical and business perspective. Dynamics 365 is different than other options because it is a single cloud-based platform with built-in public sector functionality. Dynamics 365's continuous update model allows the City to be prepared for any new challenges.

The City processes approximately 12,000 invoices and issues 6,000 checks each month. In the first ever cashiering solution deployment in the public sector, we replaced the City's original cashiering solution with our own. Our Cashiering solution leverages Dynamics 365 Commerce to enhance the execution and central reconciliation of cashiering transactions through features like partial payments on open invoices, fund balancing, check scanner integration, and a one-stop financials workspace. This solution has the potential for broad market adoption.

The City receives an average of 250 request for quotations (RFQs) each month. We replaced its previous enterprise portal with our Vendor Collaboration solution. This is an extension of the Power Portal, Azure Logic Apps and CDS Data Integration to D365FO and can be replicated for any government agency. Its extended features include an anonymous, self-registration portal for vendors, a defined Scoring Panel and auto-suggested RFQs for vendors to bid based on their registered categories, and ready availability of vendor payment information. This helps procurement departments remain fair and compliant. Cheryl shared metrics on how this helped the City meet its top goals:

*"This implementation helped us meet our goal of offering remote accessibility. As DAX2012 customers, users could only access it via the City network. Our primary goal was to provide more accessibility to users, especially when users are working remotely. With this D365 implementation, 500 users can now access D365 from any available browser or network."*

*"This implementation helped us provide a streamlined experience to our vendors who bid to provide services and goods to the City, including an automated registration process for vendors. With the OnActuate-developed registration process, we have registered nearly 3,000 vendors since go-live in January 2021. We also had a goal of providing a public-facing vendor portal to display all RFQs posted for the City without requiring authentication. OnActuate developed a power portal application for vendors to displays all open RFQs, details, and attachments for public consumption."*

Here are additional Microsoft technologies our services utilized to provide value:

- D365FO provides a true cloud experience, with system access to remote workers, without needing to remotely access the City network, as was required previously
- Utilized RSAT to minimize regression testing efforts
- LCS for Project Management & Azure DevOps for agile deployments
- MS Fast Track Program – Deployment Checklist
- Data preparation framework to automate interfaces

### Using a process-centric and people first methodology

At OnActuate, we understand the challenges that government organizations face and how we can work together to overcome them. We have helped multiple clients in the public sector with their digital transformations, including:

- In one of the first D365FO implementations in the U.S. public sector, we helped the Washington State Department of Labor and Industries go live within 7 months.
- We supported the not-for-profit Truckee Meadows Water Authority (TMWA) by upgrading their ERP solution to scale operations, utilize automation, and decrease extension dependencies. Ron Patch is the Senior MIS Analyst for TMWA. After the migration, Ron said:

*“Our initial expectations for a D365 Partner were that the Partner had deep expertise with D365 and the individual modules, and proven experience with success migrating clients from AX2012 to D365. OnActuate met and exceeded these criteria.”*

The process-centric approach, City-in-a-Box, is key to our success providing efficient government digital transformations. It includes catalog of nearly 500 American Productivity & Quality Center (APQC) endorsed public sector processes. We also take pride in our People First philosophy of optimizing customer success and minimizing risk through building relationships and application competency. Cheryl explained the value the City found from this approach:

*“OnActuate consistently lived up to their promises by providing robust support and following their Customer First philosophy. With OnActuate team members located globally, project work continued around the clock. This aided in our compressed implementation project plan, especially when confronted with pandemic. As we are a public sector entity, during the pandemic response, City resources serving on the front line of pandemic response were not always available. OnActuate was flexible with these teams, often meeting with them during off hours to allow City resources to focus on pandemic response.”*

OnActuate catalyzed the digital transformation journey for the City of Columbus, increasing system usability for employees and vendors and improving performance for citizens. We are proud to help government agencies utilize efficient Microsoft cloud technology so they can focus more time on servicing cities.

**Learn More:** [Cashiering Solution](#) | [Vendor Collaboration Solution](#) | [Implementation Services](#)