

PHYLOS, INC.

Solution Overview

Industry

Biopharmaceutical Research and Development

Scenario

Phylos needed a customizable purchase requisition system that is user friendly and integrates seamlessly with Microsoft Business Solutions.

Company Profile

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

Benefits

Using a custom Web-based requisition program created with Microsoft SQL Server and Microsoft Business Solutions, purchase requisition data integrates seamlessly into the Purchase Order module, reducing data-entry time, increasing purchase-order efficiency and providing an integrated data loop for tracking transactions.

Software Used

Microsoft Business Solutions—Great Plains

- Financial Management
- Supply Chain Management
- Analytics
- Customization Tools

Microsoft SQL Server

Demographic Information

Number of Employees: 105
Number of Users: 5
Number of Sites: 2

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 would seamlessly integrate with the company's new business management application. Microsoft SQL Server and Microsoft Business Solutions 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 their cutting-edge drug discovery platform to develop novel products for improving human health. The company has operations in the United States and Europe, with a 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 Microsoft® Business Solutions—Great Plains®. The company also needed to transform their Microsoft Excel-based purchase requisitioning program so that requisitions, order management and accounting could work together seamlessly. The challenge for Phylos and Microsoft Business Solutions reselling partner, DataSys Corporation, was to create a solution that would provide optimal ease of use for scientists, with full integration to Microsoft Business Solutions—at minimal cost.

Wanted: Ease of Use and Integration

The requisition solution was needed by the Phylos staff 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 scientists," says Christine Clinton, Phylos controller. Meeting that goal meant the requisition solution needed to mimic the Excel-based program in functionality but be more user friendly and fully integrate with Microsoft Business Solutions. 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 imported into Microsoft Business Solutions 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 helps the scientists save time when placing reorders, 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 Microsoft Business Solutions and created a general ledger account structure to support those reporting requirements.

The data entry and integration functionality also provides scientists with 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, eliminating the need for the accounting staff to manually code purchases, hiding the complexity of accounting from the scientists.

Key: Affordable and Easily Customizable

Although the company saw the need for an integrated system shortly after Phylos was launched in 1997, they thought that a Microsoft Business Solutions product would be too costly and complicated. Four years later, as technology advanced, a flexible solution at the right price was found using Microsoft SQL Server™.

“Over the past few years, Microsoft Business Solutions has increasingly become the standard financial system for emerging life science companies such as Phylos,” says David Merberg, Phylos Director of Bioinformatics.

Return on Investment

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.

The new solution has also resulted in a savings of time and money. Clinton says, “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. In addition, the efficiencies gained in purchasing have allowed us to increase the number of scientists by more than 40 percent without needing to hire another purchaser.”

For more information about Microsoft Business Solutions, visit www.microsoft.com/BusinessSolutions

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