



Cabarrus County Information Technology Services

Developing Enterprise ERP Using Existing Resources

Cabarrus invested in Tyler MUNIS financials over 14 years ago as part of the year 2000 conversion for core financial and payroll functions. As the county's technology computing environment developed the UNIX Informix system no longer was in line with the County's standardized Windows and SQL server environment. In 2007 the county began exploring enterprise ERP options that would improve processes, increase functionality and operate in our standardized environment. The County was willing to make the large economic investment in a new enterprise ERP system to expand functionality, automate county processes and improve disaster recovery. During the requirements gather phase for the new ERP system the economic downturn hit and tighter budgets eliminated funds for the new ERP project. The economic downturn also increased the necessity for an enterprise ERP, as all budgets were reduced it became crucial for all departments to operate as efficiently and effectively as possible. The ITS department began focusing on our existing Tyler MUNIS system and discovered as the product had developed over the years staff continued to use the system as it was implemented in 1999. The Tyler MUNIS system capabilities had developed into a fully functional enterprise ERP system however we were only using the core financial and payroll functionality. As a result of this discovery we began a concerted effort to meet the enterprise ERP scope requirements by using the capabilities of our existing system. Through process review and automation, staff training, implementation of new ERP modules, and creation of integration points with other enterprise systems we implemented an enterprise ERP system at a fraction of the cost for ERP replacement.

Our strategic plan to establish a comprehensive high availability and disaster resilience strategy required us to migrate Tyler MUNIS from the UNIX Informix to the Windows SQL platform. The migration from an end of life UNIX server to virtualized Windows servers and SAN technology improved operational processes, allowed us to increase overall resilience and reduce the business downtime of our Enterprise ERP system. Transition to the Windows and SQL server platforms more effectively aligns the Tyler MUNIS application with the County's overall technology footprint and the technology staff expertise. In house database administration ensures maintenance operations are performed after business hours. In house programming and utilization of enterprise reporting tool, SQL Reporting Services, integrated with the enterprise SharePoint solution provides additional features that make data more accessible to decision makers.

Tyler MUNIS Laserfiche integration allows us to use the County's Enterprise Content Management system to store invoices, contracts, checks, advices, and reports. Items can be scanned into Laserfiche or created in Tyler MUNIS and stored directly into Laserfiche. Items are accessible using the Laserfiche client or from Tyler MUNIS screens. ERP integration with ECM reduces our paper usage, physical paper storage requirements and increases document accessibility.

Import of data from external systems reduces data entry helps automate processes for bank reconciliation, purchase cards, and tax refunds. Import of invoice data from Bank of America Works, reduces manual entry of invoices and provides payment history in MUNIS for purchases made on P-cards. Import of data from our Enterprise Tax system to create tax refund checks makes use of the One-Time Vendor functionality to create an Accounts Payable check with a correct name and address using one vendor account number. Import of tax refund data eliminated data entry for tax refunds and use of One Time Vendor reduces required maintenance by producing a significantly less numbers of vendor records.



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Tylerforms GoDocs provides the flexibility to email, fax and electronically archive forms to our ECM. With these options we have reduced printing of purchase orders, invoices, and checks, reduced postage requirements, eliminated the purchase of costly multipart forms and reduced the need for expensive check stock. Payroll and AP direct deposit advices are securely emailed and archived in Lasaerfiche. Saved valuable staff time previously dedicated to printing and sorting paper AP and payroll direct deposit advices.

Implementation of MUNIS Self-Service provided the gateway for web-based access to MUNIS data that previously was only available through the MUNIS application. MSS provides secure and customizable websites for use by employees, citizens and vendors. Employee Self-Services provides a portal for current employees and job applicants. ESS accesses information from and stores information in the MUNIS HR/Payroll systems. Employees can access personal information, pay and tax information. A Pay Check Simulator allows employees to simulate adjustments to their pay, tax, or deductions in order to see how the changes would affect their total pay. ESS provides applicants with current job opportunities list, ability to apply for positions and manage their applicant profile online. The Applicant Tracking module is integrated with ESS and automates HR hiring process. Potential employees apply using customized online applications through Self-Service website, applications are processed using workflow; from initial screening through the interview and approval process. Data in applicant tracking is used to build personnel records in the HR and Payroll systems when an applicant is hired. Vendors can access and maintain their data via the web using Vendor Self-Service. After registration vendors have the ability to check on current and past purchase orders, maintain their profile, search POs / checks / invoices, and access vendor documents. MSS has reduced staff time spent maintaining vendor and personnel information, fielding vendor and employee inquiries, reduced printing requirements, and provided an easy secure way for vendors and employees to access and maintain their information.

Contract Management module provides workflow to create and approve contracts for purchases and encumbers funds in advance. Later you can create requisitions, purchase orders, and invoices that refer to the contract to avoid re-encumbering the same funds. Key milestones and dates trigger alert notifications to the appropriate staff. Activities tied to the contract are tracked including pending payments. The contract management improves the contract process and reduces double data entry. It is fully integrated with GL, Requisitions, POs, AP, and Workflow.

Use of the substance testing module assists in random selection, scheduling, recording and reporting of drug testing. Automates the random selection of a defined percentage from a pool of regulated employees from the employee master records. Use of this module eliminated a standalone system written for random selection, and improves accuracy, tracking and reporting processes.

Fleet Management provides an integrated solution for maintenance of county owned vehicles; cars, transportation vans, ems trucks, patrol cars, general service trucks. This module allows us to manage our fleet inventory, monitor and schedule preventative maintenance, track warranties, repairs, fuel, and parts inventory. Reporting assists in identifying vehicles that may be in need of replacement. Integration with fixed assets, financial modules and workflow allow for reduced paper work and double data entry for inventory.



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Cabarrus County continues to enhance the use of our ERP system with upgrades, training, and implementation of new modules and integration of enterprise data for improved management of core functions, streamlined processes and increased productivity.

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