INFO-EXPLORER HELPS RWC TO FOCUS ON HELPING THOSE IN NEED

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>
> FATIMA FILIPPI – EXECUTIVE DIRECTOR, RWC

Company

The Rexdale Women's Centre (RWC) is an independent, not-for-profit, voluntary agency serving high-need women, including immigrants and refugees, in the Greater Toronto area. They help clients and their families access services and find employment, allowing them to settle, integrate into the local community, and fully participate in Canadian society.
(www.rexdalewomen.org)

Challenge

RWC run many programs simultaneously. They also have multiple funders, who in turn have ever more stringent requirements for transparency, accuracy and timeliness when it comes to reporting.

Accountants spent much of their time manually maintaining the Contract-related expenditures and Program Budget Variance data in Excel.

The old processes for updating budgets, preparing claims and producing financial reports were no longer sustainable.

RWC's solution provider, BAASS, was asked to review their systems and processes, and make recommendations.

Solution

BAASS helped RWC to implement the Sage 300 Project and Job Costing (PJC) module. They also recommended Orchid's **Info-Explorer** product. Using Info-Explorer as a Business Intelligence analysis tool, Program Managers could interrogate PJC to confirm the quality of data, and check for variances to contracts.

While the combination of PJC and Info-Explorer would dramatically improve their ability to manage and report on individual programs, other challenges remained, e.g.:

- Maintaining highly granular budgets within PJC was still an onerous task.

- Consolidated program/project level data still needed to be reflected within Sage 300 GL Budget tables to support financial reporting to RWC's board, as well as for audit and external reporting purposes.

Future Plans

BAASS realised that Info-Explorer's powerful budgeting, roll-up and writeback capabilities had the potential to take the solution to another level, providing a budgeting and forecasting solution that is fully integrated with PJC. They have been working with Orchid to make this a reality:

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- After reviewing and adjusting program budgets within a purpose-built Info-Explorer cube, Project Managers would be able to write the revised budgets back to Sage 300 PJC at the push of a button, rather than having to make manual, cell-by-cell changes.

- Info-Explorer could also be used to import detailed budget data from PJC, perform a roll-up, then write consolidated program-level totals back to the Sage 300 GL Budget table.

Result

Using Orchid Info-Explorer as a BI tool, RWC's Program Managers can now perform self-service queries on their Sage 300 data whenever they wish. They have access to live data, and no longer need to rely on the assistance of their Accountant, or wait for month-end reports.

Fatima Filippi, Executive Director at RWC, was impressed by the benefits:

"We now have live data on actual revenues and costs in any given day and we are better able to track trends and variances."

Once the full solution is implemented, the way they manage program and project budgets will have been radically transformed.

"Info-Explorer will allow us to streamline our financial processes dramatically," continued Fatima.

"That means more of our funders' money can go towards helping our clients, rather than paying for our overheads."

Why Orchid?

Orchid Systems, a global Sage Endorsed and Gold Development Partner, has been part of the Sage community for over 25 years. We develop innovative Add-ons to enhance the functionality of Sage 300 (formerly Accpac).

We are a winner of multiple awards from Sage, including International Development Partner of the Year. All our Add-ons are developed within the Sage Software Development Kit (SDK), so they look and feel like other Sage 300 modules.

Visit our website anytime, or contact us to find out why over 5,000 Sage 300 sites worldwide rely on Orchid Add-ons every day to help their businesses work smarter.

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