

GENESEE & WYOMING INC.

Solution Overview

Industry

Transportation/Communications/Utilities
Tools

Scenario

As a part of the conversion from a previous accounting system, Genesee & Wyoming Inc. decided to update their chart of accounts for each of the 20 companies they had. The new structure resulted in accounts that exceeded 4000 for some companies placing a big burden on Dynamics users to get up and running.

Company Profile

Genesee & Wyoming Inc. is a holding company whose subsidiaries operate a short-line and regional freight railroads and provide rail services.

Situation

Using Modifier with VBA, Genesee & Wyoming Inc. along with their partner developed "the Account Entry Helper". The Account Entry Helper consists of a new form designed using VBA, and also integrated with Microsoft Access database to retrieve detailed account segment information not stored in Dynamics, making the learning process easier for new users, and navigation through the system easier for experienced users.

Software Used

Microsoft Great Plains Dynamics
Financial Series
Distribution Series
Fixed Assets
Human Resources
Payroll
Multicurrency
Tools - Modifier
Microsoft SQL Server

Genesee & Wyoming Inc. is a holding company who subsidiaries operate short-line and regional freight railroads. As a part of a conversion from their previous accounting system to Dynamics, Genesee & Wyoming Inc. decided to change their chart of accounts. This change presented a stumbling block to users, so Genesee & Wyoming Inc. turned to their partner and Dynamics Modifier with VBA for resolution.

Genesee & Wyoming Inc.: Improving Dynamics using the Modifier with VBA

Genesee & Wyoming Inc. (GWI) is a holding company whose subsidiaries operate short-line and regional freight railroads and provide rail services. The company's trains run in four US regions (western New York and Pennsylvania, Illinois, Louisiana and Texas, and Oregon) and Australia; affiliated companies operate in Canada and Mexico. This includes working with the movement of freight over 3,700 miles of track owned or operated by GWI railroads. The firm also provides railcar leasing, repair, switching, and storage along its lines.

As part of the conversion from their previous accounting software to Dynamics, GWI decided to update the chart of accounts used for each of the 20 companies to be tracked in the new Dynamics system. In doing so, they developed a new account structure, which better represented their business model.

According to Mark Occhioni, Business Systems Manager at GWI, this presented a big stumbling block. The new structure resulted in accounts that exceeded 4000 for some companies, placing a big burden on Dynamics users to get up and running right away. "We just thought it would take some time for our data entry personnel to be productive while trying to learn Genesee and Wyoming's new account structure," Mark explains.

To address these challenges, GWI worked with their authorized Partner, Schiesser-Copeland Consulting, to develop a Modifier with VBA customization they've termed "the Account Entry Helper." The Account Entry Helper consists of a new form designed using VBA, and also integrates with a Microsoft Access database to retrieve detailed account segment information not stored in Dynamics.

"The design of the Account Entry Helper was extremely important in getting users up to speed," explains Steve Copeland, Director of Technical Services at Schiesser-Copeland Consulting. "Our goals were twofold: make the process of learning the account structure easier for the new user, and make navigation through the system easier for experienced users. There's just no way we could've done this without the use of the Modifier with VBA."

To help users learn and navigate through the new account structure, the Account Entry Helper automatically appears each time a user's cursor enters an account number field in Dynamics. The user has several drop-down lists of choices for each of the 5 account segments. Each option in the list displays the numeric values for the segment along with a text description of each value. The text descriptions are retrieved from files generated using a Microsoft Access database and ODBC data access technologies:

As the user makes a selection, all subsequent account segments are filtered to display only valid options for the account number the user is building. Once the account number is built using the Account Entry Helper, the user can return to the Dynamics window, where the account is now displayed. For Mark, the best news is that users can find the correct account information using descriptive names for each account segment not normally stored in Dynamics:

Steve worked closely with the staff from Genesee and Wyoming to provide the Account Entry Helper, and it was clear that the VBA environment was delivering exactly what they needed. "My part in helping with the design was 'it would be nice if it would do this,'" Mark explained. "And the next day, Steve had it working exactly like we wanted."

According to Mark, the Account Entry Helper has drastically decreased the time it took for data entry personnel to learn the new account structure. "Without the Account Entry Helper, users would have had to retrieve account information from account list reports. We probably saved about 10 to 20 man-hours per week just by not having to wade through paper. An even bigger benefit is that this customization helps keep the frustration levels lower than trying to look up the accounts on paper."

For more information about Microsoft Great Plains Business Solutions, visit www.greatplains.com

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