

# OBS Success Story

## PKF Lynx



### Introduction

PKF Australia Limited (PKF) is a specialist group of chartered accountants and consulting firms that offers a full range of accounting, business advisory and consulting services to clients. PKF's clients are drawn from a wide range of industries including banking, finance and insurance, construction, tourism, government, mining and professional services. A member of PKF International Limited, which has 400 offices in 119 countries, PKF has offices in every state in Australia.

PKF works with businesses and individuals on a path of growth and tailors solutions to ensure its clients grow and succeed in the challenging business environment of today and aims to give the best professional service to its clients.

### Challenge

PKF's client and staff information is stored across multiple systems, which are accessed by employees across various divisions and business units. For example, Finance and HR use the client billing system Advanced Professional Solutions (APS), address verification system QAS and CourseMill (training);

Payroll uses Chris21; and the IT department uses Microsoft Active Directory and Exchange Server 2003.

These systems were updated manually and there was no central, automated process for updating the same information into all systems at the same time. This resulted in poor data quality, costly rework time for each department, significant IT support in maintaining the data in the systems and a lack of visibility between the different business units and divisions for commonly used information.

PKF needed a solution that would integrate all of the systems and provide clear, common workflow processes and a single point of entry for data to improve consistency and quality.



Chartered Accountants  
& Business Advisers

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### Solution

PKF recognised that there was not a suitable 'out-of-the-box' solution on the market to meet its requirements and that a custom solution would need to be built. Based on this, PKF requested three companies, including OBS, to develop a project scope based on its requirements.

"As a professional services firm, we have a very complex model, a large number of employees and a variety of different business units. The developers were able to very quickly grasp and understand the nature of what we do," said CIO Mark Carmichael.

PKF chose OBS to develop and implement a custom system because of the strength of the existing relationship, OBS' understanding of its business model and requirements, and satisfaction with OBS' performance in implementing Cougar.

OBS custom-developed and implemented Lynx, a system based on Microsoft InfoPath forms, SharePoint lists and Nintex Workflow 2007 Enterprise Edition, all sitting on the MOSS platform. As part of the Lynx system, Nintex Workflow 2007 was incorporated into the PKF national electronic document and records management system (EDRMS) to provide functionality for document approval, routing and creating audit trails.

Lynx is an integrated system that provides PKF with a single point of data entry. Staff access systems via a single screen and use Microsoft InfoPath forms to enter new client/staff details or change existing details and all information goes into a single staging area. Notifications are then sent to the relevant person, meaning all data must be approved before being uploaded into the systems. This ensures that all data is consistent and clean as it enters the system.

As an example, when HR enters details of a new employee in a new staff form, which is stored as an item in a SharePoint list, a workflow is commenced to request further information from Payroll, IT, Finance and Administration. This information is used to automatically generate an email address and user name against Microsoft Active Directory, an employee number and record in Chris21 (with pay details), access to APS and a CourseMill student profile for training.

### Outcome

PKF now has an integrated solution that provides a central process to update departmental systems with the same information at the same time. The system cleans information through workflow applied verification checks and logic as well as approval requests to the primary user group.

Lynx has eliminated the problem of multiple entries of client and staff data, improved the quality of data within the systems and has provided improved visibility of information across all departments and business units within PKF.

The benefits from this are noticeable: PKF's data is cleaner; productivity has increased; administrative overhead costs have reduced; and time-savings have been noticed for all staff, particularly the IT department, which now spends significantly less time solving problems.

Within a couple of days of implementing Lynx, a high number of updates, changes and additions were put through the system. CIO Mark Carmichael was surprised by how quickly the system was adopted.

"Implementing Lynx highlighted why PKF had so many inconsistencies in other applications. Now we have a single point of entry and the data is clean as it goes into the system," Mark said.

Mark also praised the OBS team for developing Lynx and for the service they provided PKF across both the Lynx and Cougar projects.

"It has been really easy to engage with OBS, the team is very responsive and it offers a good product. Technically OBS is excellent and it engages top quality developers, who very quickly understood our requirements," Mark said.