



Elsinore Valley Municipal Water District migrates to Infor CloudSuite Financials for more actionable analytics

Elsinore Valley Municipal Water District (EVMWD) is a public, nonprofit entity that oversees water supply, treatment, disposal, and recycling in Lake Elsinore, CA. The public organization recently decided to migrate its Infor Lawson GL system to Infor CloudSuite™ Financials. The result is a complete transformation in how EVMWD works, analyzes, and makes financial decisions for more than 44,500 water connections.



HEADQUARTERS
Lake Elsinore, CA

OPERATING REVENUE
\$55 million

INDUSTRY
Nonprofit

INFOR PRODUCT
Infor® CloudSuite Financials

WEB SITE
evmwd.com

“As long-term Infor customers, we relied on their team even before we decided to migrate to Infor CloudSuite Financials. They were integral in planning what our optimum system would look like, long before anything was built.”

James Ollerton
Director of Information Technology
Elsinore Valley Municipal Water District

Transcending the traditional GL

Time to evolve

EVMWD signed on as an Infor CloudSuite Financials early adopter in 2014. The district already had a long-standing relationship with Infor, had been using Lawson Supply Chain and Financials for years, and was ready to evolve to a next-generation financials suite.

Its former general ledger system, running on premise, wasn't providing the support for decision-making EVMWD needed to run its business. Its existing GL was effectively restricted to only three buckets of information—company, accounting unit, and account. For every fund, department, and cost center combination, EVMWD had to create an accounting unit, and set up a new rule. Even when existing funds and cost centers that hadn't previously done business together did so, a new concatenated member had to be created. With 70 funds, 1,010 accounts, 2,454 accounting units, and 6,301 activities, it was a maintenance nightmare.

“Infor did the ‘deep dive’ with us before we migrated to Infor CloudSuite Financials. We had numerous discussions so staff were fully aware of the opportunities we had with Global Ledger.”

James Ollerton

Director of Information Technology
Elsinore Valley Municipal Water District

Business results and efficiencies



Consolidated funds from 70 to 8



42,000 water connections managed



Doubled number of EVMWD information repositories

Preemptive planning

The Infor CloudSuite Financials project was viewed as an essential piece in helping the district use its financial data to remain successful as a publicly financed, nonprofit entity. With Infor CloudSuite Financials, the district could streamline key processes such as project cost accounting and grant management, which is key for an entity that regularly receives six-figure grants. A move to the cloud would also provide the opportunity to enable mobile capabilities.

The district team worked closely with Infor to envision what they wanted the system to look like. They started at the end, looking at the reporting, and analytic capabilities they wanted to achieve, and worked backward from there. To accelerate the project, the Infor/EVMWD team developed a conceptual design within Infor CloudSuite's Global Ledger that would provide unprecedented analytics and data insights.

An easy adoption

To phase, or not to phase

The final design enabled transactions to be spread across eight levels of detail—company, fund, department, program, project, phase, account, and funding. This enabled EVMWD to perform analytics that previously would have had to occur between four data repositories. EVMWD's team also weighed whether to do a straight migration of its General Ledger, or to conduct it in phases.

"With our migration to Infor CloudSuite Financials, we have a system that is both modern, yet familiar. That has allowed us to achieve our return on investment quickly and easily."

James Ollerton
Director of Information Technology
Elsinore Valley Municipal Water District

EVMWD chose the robust, detailed approach, and did so via a single migration process from Lawson. The accounting unit concept was broken out into the separate dimensions, while the business users consolidated 70 funds into 8. In conjunction with Infor's solution architects, EVMWD also found more efficient alternate ways to track revenue expenses, for example, by using a phase dimension in combination with projects, rather than creating individual activity and project placeholders.

Front end work pays off

User adoption of Infor CloudSuite Financials and the newly designed Global Ledger has been very positive. Users describe their experience as more intuitive, and similar to what they are accustomed to when using the internet to check the weather or pay bills. There are no more function codes, nor the need to jump from form to form as they are automatically combined via delivered workflows. Structure maintenance has been notably streamlined, with noticeable improvements from the consolidation of Global Ledger and Projects into one module. With better, easier analytics, EVMWD can create new dollar and resource efficiencies.

For others migrating to Infor CloudSuite Financials from Lawson, the EVMWD team recommends performing a pre-project review of the accounting unit structure with Infor. By leveraging its existing structure and applying the business' management reporting and analytical needs to it, EVMWD efficiently migrated from Lawson to Infor CloudSuite Financials, and brought the organization up to 2017's standards.

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