# SWK and Acumatica Enable Performance Validation to Streamline Project Accounting

**SWK TECHNOLOGIES**

## About Performance Validation, Inc.

Founded in 1988, Performance Validation (PV) is headquartered in Indianapolis, IN, and has offices in Michigan, Illinois and Kansas. PV delivers commissioning, qualification, validation, and quality services to pharmaceutical, biotechnology and medical device manufacturers.

PV's core services assist these FDA regulated companies in meeting the current Good Manufacturing Practices and Quality System Regulations required by the agency. PV enables their customers to verify that their facilities, equipment, and systems are suitable to meet their intended purpose, are installed and operate correctly and that the processes used to manufacture the product results in a consistent high-quality output.

CGMP and quality system regulations create a large volume of regulations that require significant effort to demonstrate compliance. FDA-regulated life science businesses require specific controls and best practices to be exhibited at every stage of the regulated process, including manufacturing, quality, sanitation, electronic documentation and critical airflow control.

## Why PV's services are essential to companies with strong regulatory compliance requirements

This regulatory reality makes consultant groups such as PV valuable in assuring systems are validated per FDA and internal regulatory requirements. Performance Validation recognizes this, and ensures that all consultants are familiar with and prepared to advise on industry standards and the FDA regulations their clients are expected to follow. This level of immersion affords PV consultants firsthand knowledge of the regulations they focus on so that they may lend this expertise to the manufacturers they serve without allowing any gaps to form.

A project by PV includes guidance as well as resources devoted to allowing clients to achieve compliance for equipment and facility factors under the commissioning, qualification and validation umbrellas. This includes training as well as advisement that enables personnel to fulfill those regulations at the individual level, and repeat those processes consistently from there forward.

## Why PV's services are essential to companies with strong regulatory compliance requirements (cont'd)

PV's validation project involvement typically revolves around developing and facilitating execution of compliance deliverables. Often Performance Validation will help organizations establish new documentation methods based off of templates and firsthand knowledge PV's consultants provide that comply with requirements such as Part 11 of the Code of Regulations Title 21 (21 CFR Part 11), CGMPs (21 CFR 210/211) and the Quality System Regulation (21 CFR 820). At other times, PV will aid clients in adjusting their existing processes to incorporate that documentation and allow for testing of the equipment being used.

Performance Validation's services cover a wide range of areas including temperature and humidity mapping, pharmaceutical and medical device equipment validation/qualification, critical airflow visualization, building commissioning, and computer system validation. In addition to physical equipment assessments, PV also provides validation for computer systems such as Enterprise Resource Planning (ERP), Laboratory Information Management Systems (LIMS), electronic quality management systems (eQMS), spreadsheets, data analytics, automation (SCADA), and laboratory systems. This gives PV firsthand knowledge of the limits of enterprise software systems and of the modern requirements a solution must fulfill for project management functionality.

Operating within this environment demands a certain level of experience and understanding before a project even begins, but once a proposal has been accepted, PV's consultants require a full picture of what that project will entail and who will be involved. Above all, the project must have controls in place before commencement, but the biggest challenge is to ensure that the solutions provided are cost-effective.

## The need to integrate and automate

With all of this mind, Performance Validation has made a concentrated effort to adopt better technology as



Performance Validation CFO Phillip Burns

the times have changed. Just as many of their clients have done to optimize documentation compliance, PV has migrated from paper-based systems to MAS 90, then to MAS 500, and currently Acumatica, a state-of-the art, cloud-based software solution for their accounting and project management data needs.

Performance Validation CFO Phil Burns led the charge in 2016 to begin searching for a new solution that would enable them to leverage the cloud. They relied on a traditional MAS 500 (now Sage 500) system that did not provide the type of data management they wanted,

and created siloes across their server. Additionally, they were afraid the legacy solution was in danger of being discontinued and they would stop receiving support.

The PV accounting team decided it was time to move on from Sage to find a modern ERP solution that would grant them more comprehensive visibility into their processes, and consolidate that information into a single version of truth. They also wanted to move away from relying on traditional technology and wanted a system that was browser-accessible. PV began searching for a cloud solution that would fulfill these needs.
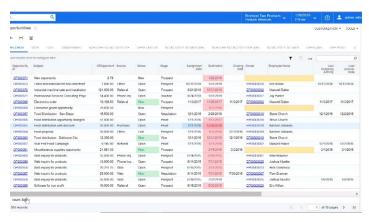
## What Performance Validation discovered

Their search eventually led them to Acumatica Cloud ERP after Burns had caught glimpses of the name from professional contacts and publications. Digging deeper into the software and taking a look at Acumatica Partners, they became convinced that the solution would fulfill the roles they needed and that SWK Technologies was the provided best suited to implement.

The implementation team on SWK's side included Michael Schmitt, who helped oversee the first ever integration of the Acumatica Project Accounting module by SWK. Mike stayed on with PV for two weeks to provide training and custom report writing. After just over three weeks of working with SWK, Performance Validation's Acumatica implementation went live.

After deploying the solution, Acumatica exceeded expectations and was able to fulfill the accounting functionality they sought. "We found that Acumatica did exactly what we were looking for," said Burns. "I don't think we have any regrets." The cloud solution quickly became a "one stop shop" for all of PV's data and has provided a cost-effective solution to all of their previous information management issues.
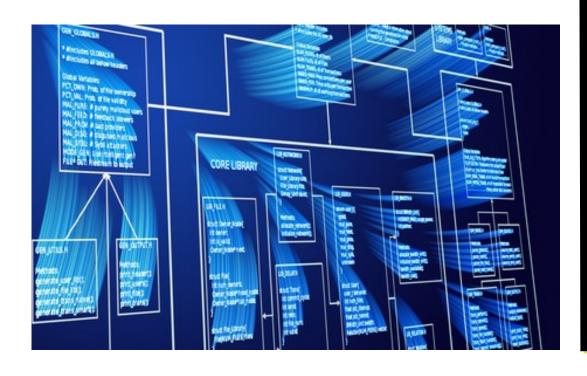
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## What Performance Validation discovered (cont'd)

SWK's implementation of Acumatica has afforded PV increased visibility for their project accounting data and the cloud ERP is progressively being adopted for individual project management functions. The native flexibility of the solution is being leveraged by Project Leads for reporting using internally customized queries. CSV Manager and Project Specialist at PV, Kevin Marcial, has expressed interest in expanding usage of Acumatica's project management capabilities as they continue to learn the extent of its features for data consolidation.

Performance Validation's accounting team similarly expects even better returns from their solution as they continue to dig into the functionality. Currently, their biggest challenge is matching the software's speed to take full advantage of upgrades to the technology, but Phil Burns proclaims he is confident that Acumatica will meet all of their needs as PV realizes the full range of the cloud ERP software's benefits. For any questions that do arise, they reach out to SWK for support and work closely to rectify any situation.

**If you want to learn more about how SWK can help you with your business process challenges, and how the latest software and technologies can help you integrate, automate, and secure your systems, contact us today.**

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