



Waterloo Catholic District School Board Gives Microsoft Dynamics NAV an A+

Overview

Country: Canada

Industry: Education

Customer Profile

The Waterloo Catholic District School Board is the eighth largest Catholic school system in Ontario. Its 2,500 staff promotes educational excellence among 30,000 elementary, secondary and continuing education students.

Business Situation

Waterloo Catholic District School Board was frustrated by its complex and aging business application software and sought a new integrated and easy to use solution.

Solution

Waterloo Catholic District School Board deployed Microsoft Dynamics™ NAV because it offers the ease of use, rich reporting features, integration and stability the college was looking for.

Benefits

- More flexible reporting
- Increased budgeting transparency
- Lower administrative costs
- Higher productivity
- Improved efficiency

“With our new solution, transactional data is easy to read, budgets are easier to monitor and users’ understanding of financial data is increasing across the organization. It’s a huge step for us.”

Shesh Maharaj, Senior Manager of Financial Services, Waterloo Catholic District School Board

The Waterloo Catholic District School Board is the eighth largest Catholic school system in Ontario. Its 2,500 staff members promote a tradition of education excellence among 30,000 elementary, secondary and continuing education students. Faced with increasingly complex financial reporting requirements, the school board struggled with its aging ERP software which its staff found difficult to use. Working with Microsoft® Certified Partner Altus Canada, the organization chose to implement a business application system based on Microsoft Dynamics® NAV, formerly Microsoft® Business Solutions - Navision®. The implementation of Microsoft Dynamics NAV enabled the organization to design a new budgeting process that saves more time and money. Waterloo Catholic deployed Microsoft Dynamics™ NAV because it offers the ease of use, rich reporting features, integration and stability the school board was looking for. Most importantly, the staff loves the ease of use of Microsoft Dynamics NAV which has led to an increase in overall worker productivity.



Situation

One hundred and seventy years ago the Waterloo Catholic District School Board (Waterloo Catholic) was no more than a one room schoolhouse. After guiding children through three centuries of elementary and high school education, the corporate body overseeing Waterloo Region's Catholic schools is the eighth largest Catholic school system in Ontario. Waterloo Catholic oversees 47 elementary schools and five secondary schools. Its 2,500 staff members promote a tradition of education excellence among 30,000 elementary, secondary and continuing education students.

A public sector organization—Waterloo Catholic makes transparency and accountability a high priority. As a result, the organization's demand for financial reports is high. Its reporting needs have also become more complex in recent years due to changing accounting standards and new legislation aiming to promote accountability. Technology tools have played an important role in helping the school board meet these needs, but the aging BAS technology it was leveraging began creating challenges for the organization as it grew.

"We were using technology implemented in 1983. It was functional, but we continually had users complaining about how difficult it was to use," says Shesh Maharaj, Certified General Accountant and Senior Manager of Financial Services, Waterloo Catholic District School Board. "Our users also had difficulty reading the data that was generated by the system. As our reporting needs grew, we found ourselves up against the wall in terms of what our old system could provide. Clearly something had to give."

The school board was also concerned about security issues around its existing solution. The product had been slated for an upgrade for six years and as the upgrade was yet to

materialize, the organization felt the DOS-based solution was not providing the level of security Waterloo Catholic required for its confidential information.

With these needs in mind, the organization decided to seek out a business application solution that would be easy to use, cost effective, and could meet its complex reporting requirements efficiently and securely.

Solution

In 2004 Waterloo Catholic began working with Microsoft® Certified Partner Altus Canada on implementing a business application solution. Formed in 1998, Altus Canada is a top provider of integrated enterprise technology solutions to nonprofit, government and education organizations in Canada. Based on the needs of Waterloo Catholic, Altus Canada recommended the implementation of its specialized solution—Navigator—which is a complete business management solution powered by Microsoft Dynamics™ NAV, formerly Microsoft® Business Solutions - Navision®.

"As is the case with many education organizations, Waterloo Catholic had strict budgetary parameters for its new solution. This only reinforced for us the fit of the Microsoft Dynamics NAV technology to their needs, as the solution is very economical," says Nicola Dickinson, partner, Altus Canada. "With Navigator and Microsoft Dynamics NAV we knew we would be able to streamline the school board's business processes, increase productivity as well as connect its entire staff to an integrated solution."

Custom fit technology

As Microsoft Dynamics NAV is designed to allow extensive customizations from within an integrated development environment, Altus Canada was able to work with Waterloo

Catholic to ensure the solution precisely fit the school board's needs.

"Because of the technology expertise and customer service excellence exhibited by Altus Canada we felt we were in good hands and were comfortable with making such a significant change," says Maharaj.

"Additionally we had great confidence in the Microsoft Dynamics NAV solution. Because it is a Microsoft product, we felt comfortable that we would receive any support we may need. Microsoft's future focused approach to software development, the investment the company makes into R&D to ensure its products effectively and securely meet customer needs gave us additional confidence in the technology."

Reporting never looked this easy

The seamless integration between Microsoft Dynamics NAV and Waterloo Catholic's other IT systems also helps ensure that financial information is easy to access any time.

Drill-down functionality and on-the-fly filters in Microsoft Dynamics NAV help Waterloo Catholic transform budget tracking documents from passive summaries to practical instruments that offer precise statements with fully updated information. The school board now has complete financial insight across the organization so it can make timely and informed decisions—with data from both the current fiscal year and previous years.

But the feature of Microsoft Dynamics NAV that made the solution stand out furthest above competitive products was that it works like other familiar Microsoft products, helping reduce the time required to learn how to use the software and fuel Waterloo Catholic's productivity.

"We use Microsoft® Office throughout our organization for basic processing needs—we would not be as efficient without it. The fact

that Microsoft Dynamics NAV has the familiar look and feel of Microsoft® Outlook was certainly a big part of our decision to choose this solution," says Maharaj. "We knew that the pressure of learning a new system would be mitigated if our staff felt we were providing them with a system that would be easy to learn and use. This was a huge plus."

Benefits

The new business management solution is currently used by Waterloo Catholic's elementary and secondary school administrative teams. Although the organization is still exploring the full possibilities of their Microsoft Dynamics NAV solution, the productivity, efficiency and ease of use benefits they have seen so far are already making the staff of Waterloo Catholic sing the praises of their new technology—particularly on the weekends.

"With the help of Microsoft Dynamics NAV we have revamped our budgeting process. Tasks that used to take days to complete now take only hours," says Maharaj. "The difference is truly amazing. We got our weekends back!"

A solution you can bank on

Budget management is simplified for Waterloo Catholic with the help of Microsoft Dynamics NAV and the cash management features. The solution automates bank account management tasks, as well as the entire check-writing process. The school board now also has more visibility into its budgetary processes with bank reconciliation tools and bank account statistics reports. With the ability to import cleared cheques into the business management system automatically, tracking of budget spending has become easier for the organization while data entry requirements have significantly decreased.

Waterloo Catholic is also now able to email purchase orders, which has allowed it to

eliminate the need for a dedicated fax line, a modem and software which was used to manage the faxing process under its old system. Simplifying the process with the help of Microsoft Dynamics NAV has helped the organization to realize both cost and time savings as administrative staff can now focus on more strategic tasks.

Easy as ABC

The ease of use of the new solution has provided the school board's staff with the ability to not only generate more reports in a significantly streamlined and quicker way, but it is also helping them make sense of the results. Where previously staff members looking for specific types of information would have needed the assistance of an experienced report writer to generate a more complex report, today they are comfortable performing such tasks on their own.

"The user-friendly interface of Microsoft Dynamics NAV is the biggest immediate benefit we've seen," says Maharaj. "With our new system, transactional data is easy to read, budgets are easier to monitor and users' understanding of financial data is increasing across the organization. Our staff is now comfortable generating reports on their own to find the data they need—it's a huge step for us."

Looking to the future

While the organization has been leveraging its new tool for a short time, they are already excited about further business process improvements Waterloo Catholic will be able to implement with help of Microsoft Dynamics NAV.

"Waterloo Catholic is now planning a move to a more focused e-payment approach which would have been close to impossible to consider without this solution. Managing finances this way will reduce their reliance on paper cheques, streamlining the budgetary

process and reducing time and printing costs associated with tracking payments manually," says Dickinson. "They will also be able to move away from relying on mail when it comes to processing payments which will not only help them be more efficient, but will add even further clarity into the budget management process."

"The feedback our new business management solution has received from our staff has been so positive that we are ready and excited to introduce further changes," says Maharaj. "With our new solution the whole organization is seeing a tremendous potential for realizing new efficiencies and productivity levels."

For More Information

For more information about Microsoft products and services, call the Microsoft Sales Information Center at (800) 426-9400. In Canada, call the Microsoft Canada Information Centre at (877) 568-2495. Customers who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234 in the United States or (905) 568-9641 in Canada. Outside the 50 United States and Canada, please contact your local Microsoft subsidiary. To access information using the World Wide Web, go to: www.microsoft.com

For more information about Altus Canada products and services, call (416) 516-0050 or visit the Web site at: www.altuscanada.com

For more information about Waterloo Catholic District School Board products and services, call (519) 578-3660 or visit the Web site at: www.wcdsb.edu.on.ca

Microsoft Dynamics

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