



Microsoft® Dynamics Customer Solution Case Study

Saskatchewan School Boards Score Top Marks in Efficiency with New Financial Management System

Overview

Country: Canada

Industry: Education

Customer Profile

Saskatchewan Learning provides funding to school divisions across the province.

Business Situation

Without a common financial management system in place, Saskatchewan Learning had no easy way to assemble data and reports. This hindered information sharing across the 82 school divisions.

Solution

Saskatchewan Learning enlisted the aid of Open Door Technology to deploy the Education Suite, which is based on Microsoft Dynamics™ NAV, formerly Microsoft® Business Solutions – Navision®.

Benefits

- Reduced licensing fees
- Standardized reporting
- Improved efficiencies
- Real-time financial information
- Empowered employees

“We can basically cover the entire province with fewer than 300 licenses. We’re expecting to save around \$300,000 a year in annual licensing and maintenance with Microsoft Dynamics™ NAV.”

Roy Chursinoff, Director, Education Technology Consortium, Saskatchewan Learning

Education has two main goals: to give individuals the opportunity to develop themselves, and to provide society with the skills it needs to evolve in its best interests. Canada's educational system reflects the belief in the importance of education. In December 2000, Saskatchewan Learning formed the Education Technology Consortium (ETC); one of its goals was to boost efficiency across school divisions by finding a common financial management system. At the time, each school division had a different financial management system which barred information sharing, hindered standardized reporting, and slowed processing times. ETC chose to standardize on Open Door Technology's Education Suite, which is based on Microsoft Business Solutions-Navision®, now part of Microsoft Dynamics™. The solution provides a fully integrated environment for human resources, payroll and financials. Since the deployment, school divisions have become more efficient while reducing administration costs, and empowering employees with greater access to information.



Situation

According to a 2003 survey by Statistics Canada, literacy skills in the province of Saskatchewan are among the highest in Canada. Clearly, education is a top priority in the province, thanks in part to the efforts of provincial government department Saskatchewan Learning. The provincial government funds about 60 per cent of education in the province, and school divisions provide the remainder through their local tax base.

In December 2000, Saskatchewan Learning created the Saskatchewan Education Technology Consortium (ETC) – a partnership between all major educational institutions in the province’s K-12 sector. The initiative aimed to develop a vision for e-learning, expand e-learning resources, support and improve e-business requirements, and provide professional development opportunities for all school division staff.

The ETC decided to take the funding that goes out to school divisions and spend a small portion of it on their behalf to improve operational efficiency across the board. “Our goal was to get savings on the business side and redirect those funds and resources to the classroom,” says Roy Chursinoff, Director, Education Technology Consortium, Saskatchewan Learning. “Ultimately, e-business would make room for e-learning.”

In 2002, the ETC partnered with the Secretary’s Treasurer’s Association (SASBO) to develop a vision for e-business. Following a study of the existing technology conditions, the Consortium discovered that divisions were using as many as 12 different financial applications for payroll, accounting and human resources management. Some small school divisions even continued to use paper or spreadsheet-based solutions. The ETC considered standardizing on some of the existing systems, but none had the scalability

to be deployed province-wide. Moreover, integrating and enhancing existing applications would be difficult, expensive and time-consuming.

“We knew many of the smaller systems being used wouldn’t work in a larger school division since they lacked proper HR or payroll. Some schools did their books on spreadsheets, while others used Oracle. We saw quite a cross section,” says Dr. Donald Lloyd, Superintendent of Administrative Services, Greater Saskatoon Catholic Schools Chief Financial Officer, Saskatoon Catholic, one of the school divisions that pilot-tested the solution. “We wanted one common solution to serve the needs of all school divisions.”

Without a common financial management system in place, Saskatchewan Learning had no easy way to assemble data and reports, or share information across the 82 school divisions. The ETC decided it was time to remove these barriers which hindered cross-division collaboration by standardizing on a common financial management system.

Solution

In the spring of 2004, the ETC’s E-Business Committee initiated an RFP process to find the right service provider. After reviewing a number of submissions, the committee chose to work with Gold Certified Microsoft® Business Solutions Partner Open Door Technology, and deploy the company’s Education Suite. Based on Microsoft Dynamics™ NAV, the Education Suite offers Saskatchewan K-12 school boards a fully integrated human resources, financials and payroll solution.

“At the time, there was no midmarket software for school divisions. Solutions were either very small or very large,” says Lloyd. “But we couldn’t spend tens of millions of dollars on solutions like Oracle or SAP. We needed an affordable solution that worked in

an education setting. That's why Microsoft Dynamics™ NAV fits in so nicely for what we need."

Soon after the decision had been made, the project scope changed. That fall, the provincial government mandated the amalgamation of the 82 small school divisions into 28 larger bodies. The changes were slotted to take effect on January 1, 2006.

The ETC solicited support from the ETC's board of directors and Saskatchewan Learning to do a capital cost purchase on behalf of all school divisions, and purchase user licenses for conducting pilot projects to test the solution. The committee selected two school divisions for the pilot project from those already eager to implement the Education Suite: Saskatoon Catholic, a large urban division; and Saskatchewan Valley, a rural school division that would be amalgamating with other rural school divisions with different systems. The pilots commenced January 1, 2005.

"The intent of these pilots was to verify the Education Suite with Microsoft Dynamics™ NAV would match the functionality of the existing systems, and provides the additional functionality they were lacking such as HR and payroll," says Chursinoff.

Over the next year, Open Door Technology deployed HR, payroll, accounts payable, accounts receivable and general ledger components of the Education Suite to the pilot divisions. Open Door Technology also installed an Employee Portal, a feature of Microsoft Dynamics™ NAV that integrates the software with Microsoft SharePoint® Portal Services. The goal of the Employee Portal was to give staff members a self-serve option for finding information about payroll, vacation time, scheduling, and contacts. As well, Microsoft .NET portals were used to develop a

financial manager budget portal and an advanced HR portal.

"The budget portal allows school principals and superintendents to analyze their budget information in real time. They can review purchase orders, costs, and even original invoices," says Malcolm Roach, President, Open Door Technology. "In addition, the self-serve HR portal allows staff to access their own employment history or payroll information online. This has helped save a significant amount of administration time."

Benefits

Open Door Technology facilitated a rapid, seamless deployment of the Education Suite, based on Microsoft Dynamics™ NAV at 13 school divisions by January 2006. As the Education Suite is rolled out across the province, Saskatchewan Learning sees major gains on the horizon. In fact, the Education Technology Consortium has been so pleased it has committed \$200,000 a year for enhancements to the solution.

An A+ for better licensing

In 2003, Saskatoon Learning had 82 divisions. The amalgamation raised questions about the number of user licenses Saskatchewan Learning would actually need. The ETC reasoned it would need around 350 for the province, with 10 to 20 users in each division.

At the time, the ETC estimated that with the exception of one large urban division, school divisions spent around \$500,000 a year in annual licensing and maintenance, excluding regular upgrades to the product. Following the pilot projects, however, the committee discovered remote users did not require a license for the Web portal.

"Initially, we thought a rural division, for example, would require about 10 user licenses. But since remote users do not need

a user license, we can get away with as little as six or eight,” says Chursinoff. “In our opinion, other systems we reviewed were much more expensive in comparison to Microsoft Dynamics™ NAV. For example with Oracle, a school division with 2,000 employees would need 2,000 licenses – even remote users. We simply could not afford it.”

The ETC purchased 220 Microsoft Dynamics™ NAV licenses after estimating that 14 school boards would voluntarily implement the system. Even though 18 divisions came on board to date, the ETC still had 20 or 30 licenses left over.

“We can basically cover the entire province with fewer than 300 licenses,” says Chursinoff. “We’re expecting to save around \$300,000 a year in annual licensing and maintenance with Microsoft Dynamics™ NAV.”

Top marks for time savings

Previously, school divisions printed out budget reports and mailed them to each of their schools for their review. Until school principals received the reports, they had no idea of their actual budget commitments. By the time schools received the reports, the information was already a month or two late.

With the new Employee Portal in place, school principals have access to a secure, live listing of their expenditures and budgets. Principals can check the Web portal for outstanding invoices or purchase orders, and verify their available funds. Since everything is posted to the budget portal in real time, all records are current as the last investment.

“We first realized the benefits at Saskatoon Catholic, which has over 50 schools. With the Web Portal, school principals no longer need to print out reports, verify that schools received them or answer any follow-up inquiries,” says Chursinoff. “The Web portal

alone has probably helped that school division free up time for two people.”

Standardized reporting makes the grade

When the provincial government announced its school division amalgamation plans, it meant as many as seven divisions would come together, each with different personnel, accounting practices and systems. Microsoft Dynamics™ NAV enabled Open Door Technology to embed a Standard Chart of Accounts directly into the Education Suite, which has helped Saskatchewan Learning cope with the amalgamation by streamlining the way all school divisions do business.

“Previously, each division used its own Chart of Accounts which made it impossible to compare expenditures – it was like comparing apples, oranges and peanuts,” says Chursinoff. “All school divisions now use the same Chart of Accounts, which means we can actually draw budget comparisons across the province.”

Working smarter with the self-service portal

Payroll in school divisions tends to be complicated. For example, a teacher might work in four different roles in a week. She might perform noon-hour supervision one day, teach Special Education students another, and teach Geography and Math the rest of the week. Each role might command different pay, vacation, or pension rates. To complicate matters further, many of the larger systems do not have the flexibility to manage these rates without some manual intervention.

With Microsoft Dynamics™ NAV, the Education Suite is designed to handle these complications. In fact, the Web portal feature has helped to empower employees and save administration time. Staff members now use the portal to apply for competitions, review their pay stubs and employment history, check for vacation days, edit their personal

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and contact information, and send updates to HR. Since the HR system integrates with Microsoft Office, Secretary Treasurers can transfer employee information into a Microsoft Excel® spreadsheet and conduct standard reporting.

“The Employee Portal is one of the most powerful pieces of this whole project,” says Lloyd. “With the portal, employees can enter their timesheets just as they would enter e-mail, and away they go.”

Microsoft Dynamics

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For more information about Microsoft Dynamics, go to:

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