

Case Study

Scenario

The **Owen J. Roberts School District** (OJR) is comprised of seven townships covering 100 square miles and is located in Northern Chester County, Pennsylvania. The District enrolls approximately 4,500 students from kindergarten through twelfth grade in one high school, one middle school, and four elementary schools. The district employs over 1,200 staff members and continues to grow.

In 2004, Owen J. Roberts began the search for a new financial management system. Historically, the district used financial management systems that were specifically created for school districts and the public sector. The downfall to these systems is that they lack the features, structure, and robustness of a system developed for the corporate world. Owen J. Roberts wanted a system developed with the best practices used by financial professionals world-wide.

Their selection criteria included:

- A trustworthy product with a proven best practices model for business financials
- SQL based to facilitate connectivity to OJR's other applications
- Accommodate 4,000 chart of accounts
- PO module with approval and workflow routing schemes
- Scalable for hundreds of users
- Payroll for 1,200 W-2's annually and direct deposit
- Fund accounting
- Encumbrances tracking
- Budgeting: Cost center/departmental budgeting
- Budget vs. actual variance reporting
- Able to connect web-portals such as budget and purchase portals
- Easy reporting tools

Owen J. Roberts selected Microsoft Dynamics-Navision and chose to work with AVF Consulting.

"We use SQL as the foundation layer of our network architecture and require all of our applications to run on SQL," says **John Zook, Technology Director of Owen J. Roberts**. "Microsoft Navision was an easy choice for us because it is a Microsoft product used by tens of thousands of finance professionals worldwide. It easily connects with our other applications and web portals, greatly simplifying our reporting procedures."

Owen J. Roberts chose AVF Consulting to implement their project. They implemented Navision in phases, focusing first on payroll.

"AVF's consultants had the expertise in accounting and payroll to configure our detailed payroll needs into a flexible application, allowing for proper allocations and both internal and external reporting."

*Beth Radford, Accountant
Owen J. Roberts School District*

Case Study

“Implementing payroll for a school district requires comprehensive set-up,” says Beth Radford, accountant for Owen J. Roberts School District. “AVF’s consultants were able to accommodate our broad, detailed chart of accounts and build allocation features to facilitate any combination of payroll allocations.”

Thanks to Navision’s flexible architecture, AVF was able to provide key customizations for Owen J.’s specific requirements, including having checks printed and automatically sealed in self-sealing envelopes. Because AVF has such a strong expertise in Navision, they were able to limit these customizations to 20% of the overall project.

Benefits

Owen J. Roberts directors cite specific areas where Microsoft Navision has increased the efficiency and productivity of their staff:

- **Reports.** “The finance department has much greater access to the reports that we need on a daily, weekly, or monthly basis. We can easily retrieve many reports directly from Navision that we could not get from our previous systems. We’ve significantly decreased the number of reports we request from the IT department, saving everyone time.”
- **Ease of Data Manipulation.** “We can easily transfer data from Navision into Excel with a simple cut and paste. Pulling GL transactions for specific date or account ranges is quick and painless. We can then sort the information any way we need to.”
- **Filtering Capabilities.** “Data is much easier to retrieve and analyze using the filtering capabilities in Navision. We can now pull data on the fly for instant reports, whether it’s for auditors, school administrators, or our department. Verifying data such as an employee’s current check deduction is easily accomplished by going directly into the General Ledger and utilizing filters.”
- **Payroll.** “AVF’s consultants have the expertise to accurately set up the chart of accounts to handle the complex pay structures of school districts. Navision allows teachers’ pay to be coded to multiple accounts very easily.”

About AVF Consulting

As one of the Mid-Atlantic's leading information technology firms, AVF Consulting has been a reseller of Microsoft Navision since 1996. The firm offers a unique blend of products and services, including fully integrated financial management solutions and technology consultation. AVF's hands-on approach ensures that every engagement receives the highest level of customer service and that each customer receives the individual attention they deserve.

The firm's professional staff provides a complete range of software and services to clientele located throughout the Mid-Atlantic region. Whether clients need a comprehensive, enterprise wide business management solution, or assistance with the design, implementation, and maintenance of their information technology infrastructure, AVF Consulting has the products and the professionals to handle the most challenging demands. Learn more about us at www.avfconsulting.com.

AVF Consulting
1220-C East Joppa Road, Suite 514
Towson, MD 21286
Phone: 410-296-5100
Fax: 410-296-5330
E-mail: jfass@avfconsulting.com