



Overview

Country or Region: United States

Industry: Not-for-Profit Organization

Customer Profile

The Denver Zoological Foundation is one of the largest and most popular zoos in the United States. With more than 1.7 million visitors each year, it is the most popular attraction in Colorado.

Business Situation

Denver Zoo used disparate financial IT systems, making it hard for employees to access the up-to-date view of the business needed to run operations effectively.

Solution

Denver Zoo decided to implement Serenic Navigator, a financial management solution based on Microsoft Dynamics™ NAV business management software.

Benefits

- Improved drill-down capabilities make business analysis easier.
- Access to real-time data boosts forecasting.
- Fast reconciliation improves view of business.
- Users no longer have to re-enter data.
- Improved reporting helps managers

U.S. Zoo Improves Financial Control and Forecasting with Integrated IT Solution

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Donna Driscoll, Chief Financial Officer, Denver Zoo

Denver Zoo, one of the largest and most popular zoos in the United States, had an IT infrastructure made up of disparate financial systems. This made it difficult for employees to access the financial data they needed to operate effectively. Wanting to take advantage of a fully integrated system, the IT team decided to implement a solution by Microsoft® Certified Partner Serenic Corporation, called Serenic Navigator. This is a financial management software solution based on the Microsoft Dynamics™ NAV business-management solution. Since going live in April 2006, Serenic Navigator has already provided Denver Zoo employees with faster and easier access to real-time financial data. Denver Zoo is now looking at additional online projects to make further improvements to the running of its organization.



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Denver Zoo

Situation

Denver Zoo is one of the largest and most popular zoos in the United States. The zoo has more than 1.7 million visitors each year, making it the most popular cultural attraction in Colorado. It is a not-for-profit organization that manages an annual income of more than U.S.\$24 million.

Financial operations at the zoo were supported by an IT infrastructure made up of a number of disparate financial systems. As a result, Denver Zoo employees found the process of extracting financial information time-consuming and cumbersome.

Donna Driscoll, Chief Financial Officer, Denver Zoo, says: “There was no integration between our financial systems, which made it difficult to get to the information we needed to manage our finances. It also involved a lot of time wasting because everything from the purchase order system had to be re-keyed into the accounts payable system.”

One of the challenges for Denver Zoo is managing multiple grants and funds. This can be a complicated process because the grants often run for different time periods and each bill needs to be associated back to the right grant. Indirect and direct costs must also be tracked.

Driscoll says: “Our financial management requirements are complex, and we needed a system that was more flexible and would help us reconcile fast. We also wanted integrated modules to manage different operations, such as inventory and grants. To put it simply, we wanted to stop using a highlighter pen to make sure everything matched up and was accounted for. When our existing system ran out of account numbers and couldn’t introduce new ones, we knew we could no longer carry on with the situation.”

Solution

The Denver Zoo technical team put together a comprehensive prerequisite outlining everything users needed in a new solution, with flexibility as the top priority. Driscoll’s review of the market revealed Serenic Navigator from Serenic Corporation, a Microsoft® Certified Partner. This solution is built on the Microsoft Dynamics™ NAV business-management solution. Using this technology, Serenic developed specific applications to meet the vertical needs of not-for-profit organizations, such as compliance requirements.

Driscoll says: “The final decision came down to SunSystems and Serenic, running on Microsoft Dynamics NAV. But the drill-down capabilities and the flexibility to navigate easily in Serenic Navigator were impressive. The Serenic team members were straight-talking, which we liked. They were also local to us and really understood the requirements of not-for-profit organizations.”

Denver Zoo chose Microsoft SQL 2000 Server™ as the centralized database for the solution. This offers tight integration with the organization’s other SQL Server databases, which handle admissions and fund raising. SQL Server acts as a secure platform for transactions, ensuring power failures don’t corrupt the system and providing peace of mind that data is always secure.

Seric was able to meet tight time constraints for implementation at Denver Zoo, carrying out all training, setting up vendor checks, and building specific reports.

Steve Glauber, Director of Product Marketing, Serenic Corporation, says: “Denver Zoo required considerable customization of the solution, such as creating shortcuts in the data for automating processes. Account numbers were added to

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support specific accounting needs. We also set up business rules to automatically send out e-mail messages for permissions to control budgets and prevent overspend. Microsoft Dynamics NAV is very flexible and efficient to customize, which meant we could deliver exactly what the customer wanted.”

Denver Zoo currently has a seven-user license, with four people using the solution in accounts and three working on purchase orders. The system went fully live in April 2006.

Benefits

Microsoft Dynamics NAV technology can be integrated into organizations quickly and easily and integrate seamlessly with existing IT infrastructures, minimizing development costs and ensuring fast time to market. With little training, employees can take advantage of familiar, easy-to-use tools that enhance productivity from the start.

Drill-Down Capabilities Enhance Financial Management for Managers

Denver Zoo employees are already enjoying the benefits of the solution’s drill-down functionality. Serenic Navigator takes advantage of the flexibility of the Microsoft Dynamics NAV architecture to break down data into different views of financial information. Users can also drill down to all levels of financial detail.

This degree of flexibility means managers are now able to see exactly what they are spending their budgets on—and in great detail. They can also compare their own budget spend to allocated grants and funds quickly and easily. Users can balance all 70 funds and run them as separate companies for accounting purposes.

Driscoll says: “Departments are beginning to realize the extent to which they can analyze their budgets, and we’re pretty excited about

this. The level of detail that can be accessed helps us report back on how funds are being spent. The ability to drill down against each line item to show how funds are being used is extremely valuable. For example, we can show the world how our elephant fund is supporting us in helping elephants.”

Integration of Systems Helps Users Analyze Financial Data

With all financial information fully integrated, employees can gain a complete picture of operations. They can begin to introduce new areas of analysis, such as cross-referencing budgets against activities and between departments.

For example, each department has its own set of expenses. Now that the system is completely integrated, users can cross-check budgets and more effectively allocate spend against the right budget holder.

Driscoll says: “Being able to cross-reference budgets is powerful. It may be the horticultural department that buys plants and the marketing department that carries out events. But then you need to consider which plants were used at a particular event, who owns the budget, and who needs to account for it. It is impossible to get a meaningful view of our financial operations without an integrated and flexible solution. It is the first time ever that we can manage this depth of business analysis.”

Real-Time Data Access Helps Employees Accelerate Accounting and Forecasting

With greater management of budgets and the ability to forecast critical areas of activity, Denver Zoo employees can already see the advantages of having an up-to-date view of activity across the organization. Dean Paulson, Director of Information Systems, Denver Zoo, says: “Real-time access to data for managing budgets is a great feature. We often have budgets that are committed, but

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not yet spent. Being able to manage this information in real time helps us know exactly where we are with our budgets. This means we can forecast more effectively.

“Certain departments such as marketing now know exactly what they are going to spend and by what date. By managing budget codes on a real-time basis, departments can be in control immediately and plan accordingly.”

With more detailed information available, Denver Zoo managers are also beginning to see the benefits of more timely reports. Users can go directly from the report summaries to identify what is happening at a more fundamental level.

Driscoll says: “Reporting is the most critical part of the system. It is useless to put information into the system if you can’t get it out in the way you want it. It is important to spend valuable time on actual accounting and forecasting, rather than the reporting process.”

Reconciliations Reduced to One Week

One of the criteria for the new Denver Zoo system was the ability to achieve faster reconciliations. Denver Zoo has realized significant improvements in this process now that information is easily accessible and available in one place. Driscoll says:

“Reconciliations are working really well. We used to have to wait two weeks after month end before reconciliation could be done. We can now do this on a weekly basis. We’re looking to do this on a daily basis soon.”

Productivity Improvements Deliver Return on Investment within One Year

Once Denver Zoo integrated purchase orders with accounts, it was able to reduce multiple data entry, which has saved time and reduced the need for paper-based systems. Now that specific notes can be added to

purchase-order transactions using the Microsoft Dynamics NAV notes functionality, users are better informed, which saves time sourcing relevant information.

Denver Zoo is now working with Serenic Corporation to create an online portal system that will automate the organization’s requisition process. The portal system will be based on Microsoft Windows® SharePoint® Services and integrated with Serenic Navigator.

Paulson says: “Currently, we have two users who enter the purchase orders on the system. Once the purchase order is created, we print it and sign it manually. Using Windows SharePoint Services, we will be able to fully automate the entire requisition process, removing the need for inefficient paper-based systems.”

Driscoll continues: “Every day we are seeing continual improvements. Not only are we expecting to see a return on investment on the complete system within one year, but we’re pretty excited about the changes we are making to the way we run our business.”

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For more information about Serenic Corporation products and services, visit the Web site at:

www.serenic.com

For more information about Denver Zoo products and services, visit the Web site at:

www.denverzoo.org

Microsoft Dynamics

Microsoft Dynamics™ is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems your company already has implemented. By automating and streamlining financial, customer relationship and supply chain processes, Microsoft Dynamics brings together people, processes and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

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