



SERENIC SOFTWARE CASE STUDY

SERENIC NAVIGATOR HELPS PARTNERS IN HEALTH BETTER MANAGE FINANCIAL OPERATIONS TO SUPPORT ITS MISSION

Customer Profile

PIH's mission is to provide a preferential option for the poor in healthcare. Working in 10 countries around the globe, with more than 6,000 employees and a \$65 million annual budget, PIH is able to help more than 2 million patients a year as part of its efforts to break the vicious cycle of poverty and disease.

Business Situation

PIH used disparate financial systems across its six major locations, making fund consolidation and reporting difficult. The organization was searching for a fund accounting system that could provide a common solution across its global locations in multiple currencies and languages.

Solution

PIH implemented Serenic Navigator Advanced Management Edition – certified for Microsoft Dynamics NAV, along with Jet Reports.

Benefits

- Complex fund and project management is simplified by Serenic's Dimensions feature.
- Centralized global system provides view across all languages and currencies.
- Reporting capabilities enhance analysis and save time.

"After reviewing available products for mid-sized organizations, we found that few could handle multiple currencies and languages, but Serenic Navigator could. It also was attractive to us that Serenic understood the developing world and the challenges of working in remote areas better than the other software providers we considered."

— DONELLA RAPIER – PARTNERS IN HEALTH'S CHIEF FINANCIAL OFFICER

Partners In Health (PIH) is a multi-national non-profit organization that seeks to raise the standard of healthcare for the poor everywhere through its service, training, advocacy and research programs. These programs, part of PIH's efforts to break the vicious cycle of poverty and disease, help more than 2 million patients per year.

PIH was founded in 1987 with one clinic in Haiti and a vision to bring the fruits of modern medicine to those who need it most – showing the world that providing comprehensive medical care to entire communities is not just possible, but essential. PIH has three goals: to care for its patients, to alleviate the root causes of disease in their communities, and to share lessons learned around the world. The organization and its founder's story are chronicled in a best-selling book, *Mountains Beyond Mountains: Healing the World: The Quest of Dr. Paul Farmer*.



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DONELLA RAPIER
CFO

SCENARIO

In early 2008, PIH faced business challenges typical of many multi-national nonprofit organizations that have experienced significant growth and need to manage operations across continents. With more than 6,000 employees world-wide, the organization reached a budget level of \$65 million this past year. PIH’s Boston headquarters needed real-time financial information from the field in its major locations – from Haiti and Peru to Russia and Malawi.

“With recent growth, we needed to more efficiently manage donor funds and spending across locations using different languages and currencies,” said Donella Rapier, PIH’s chief financial officer. “Our organization’s reliance on grant funding made real-time reporting absolutely essential, and we needed to significantly improve our systems capabilities.”

PIH wanted to replace multiple financial systems it was using, including a Peachtree solution at its headquarters and a homegrown system in Peru. It was using only Excel at its sites in Africa and at its headquarters to manually consolidate financial information across the organizations. PIH was searching for a fund accounting system that could provide a common solution across all locations and in multiple currencies and languages.

“After reviewing available products for mid-sized organizations, we found that few could handle multiple currencies and languages, but Serenic Navigator could,” said Rapier. “It also was attractive to us that Serenic understood the developing world and the challenges of working in remote areas better than the other software providers we considered.”

BENEFITS

Since mid-2008, PIH has rolled out Navigator in four of its planned six sites, with another office nearly ready to go live. Rapier noted the organization has already seen benefits, which will increase as more offices go through the implementation process.

“Financial operations are a huge part of our organization, so having Serenic Navigator has helped enormously and improved the effectiveness of what PIH is doing,” she said.

Today, more than 64 users across four of its global locations are using Serenic Navigator Advanced Management Edition – certified for Microsoft Dynamics NAV – as well as other applications within the Navigator extended product suite. Benefits PIH cites to date include:



“The flexibility of Serenic’s dimensions feature allows us to organize work in many different ways.”

DONELLA RAPIER
CFO



- **Real-time Reporting**

Serenic’s fully integrated product suite allows PIH to combine financials, procurement and donation management. “Navigator’s capabilities have made our process much simpler and saved a ton of paper and time – removing days of work from our previous process,” Rapier said.

Prior to Serenic, the financial department underwent an arduous procedure to generate monthly reports for managers in hard copies for review. Handwritten notes had to be entered and final copies generated. Now PIH can do all reports electronically with access through a shared server. Managers can make comments online, so reports can be more quickly and easily generated and emailed to recipients.

“It’s a huge advantage to know in real time what’s going on at our international sites by viewing reports from Boston,” Rapier said. “Before – with the variety of systems we had in place – that was impossible.” Once the implementation process is complete in all six planned locations, Rapier looks forward to doing a monthly consolidation across sites.

- **Simplified Fund Management Using Dimensions**

PIH used Navigator’s dimensions feature, which is unique to Serenic Navigator, and standardized around a single chart of accounts across the organization to better understand its financial picture at the top level. A dimension is data that you can add to an entry as a kind of marker so that the program can group entries with similar characteristics and easily retrieve these groups for analysis purposes. Dimensions can be defined by the user and tailored to a company’s needs and business processes. They are used throughout the program on entries in journals and documents, as well as budgets.

PIH has leveraged dimensions to easily report on many elements, such as fund, organizational unit, project, purpose and more, without the need for a complicated chart of accounts or the need for a separate project/grant sub-ledger. The organization also can have a standard chart of accounts globally while having the flexibility for each country office to have several of their own specific reporting dimensions.

“The flexibility of Serenic’s dimensions feature allows us to organize work in many different ways,” Rapier said. “Discrete segments give us a tremendous amount of functionality and the flexibility to define separate dimensions specific to our organization that we can drill down into to see more detail.”

For more information

For more information about Serenic Software products and services, call 877-737-3642, or visit the Web site at: www.serenic.com.



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• Centralized Global System Across All Languages, Currencies and Individual Country Requirements

Centralized access to its international information was critical to PIH. The organization's offices are often required to report locally to their respective countries and donors while also consolidating expenses paid for in Boston. Serenic Navigator's dimensionality and reporting flexibility allows for that, while maintaining a standard chart of accounts globally. In Peru, for example, PIH needs to report on a separate Peruvian chart of accounts mandated by the government there. Serenic's reporting allows that office to map from the PIH chart of accounts to the local reporting requirements.

Navigator's Replicator tool was very attractive to the organization when it selected the product, and it is preparing to implement that feature. Replicator is a data integration solution that offers universal and unique data exchange between two or more Navigator databases. PIH found that it did not have strong enough connectivity in its country offices to work from one common database in Boston. It will use Replicator to allow each country office to work with the software locally. Replicator will then synchronize changed data only between the country office and PIH headquarters to provide everyone with the most up-to-date global reporting information possible.

"We expect Replicator to be a big benefit once it is up and running, helping us to communicate across our remote offices where we need to synchronize data sets and where connectivity issues can create problems," Rapier said. "Certainly, Serenic's multi-languages feature has been extremely helpful for global communication and more accurate accounting. We are currently using Spanish in Peru and will implement the French version in Haiti."

• Serenic Support and Ease-of-Use

PIH was able to implement Serenic Navigator at four sites within six months, in part, because it was very quick for users to get onto the new system. "It's very intuitive for users, because it looks and feels similar to other Microsoft products," Rapier said.

She reported that PIH's program leaders, who are each in charge of operations in a particular country, are very happy with the system. They like the ability to define reports that they can see each month to analyze specific funds and projects.

Another advantage Rapier cites is that Serenic users at multinational non-profit groups can learn from one another. Informal user groups supported by Serenic can share insights among members who share similar challenges. "It's a big advantage to have users' groups forming and to have Serenic prioritizing its product development for the specific needs of those of us with operations overseas," she said.

