



# SERENIC SOFTWARE CASE STUDY

## SERENIC NAVIGATOR 2009 GIVES USERS INTUITIVE SYSTEM NAVIGATION AND TASK MANAGEMENT TOOLS

### Serenic Navigator 2009 Features

- **Role Centers** present specific information based on employees' job functions to help easily prioritize tasks and make quick business decisions.
- **Personalization** of Role Centers accommodates organization-specific requirements to share Business Intelligence.
- The familiar **User Interface** offers intuitive navigation and makes it easy to find information, helping to minimize training time.
- A three-tier architecture provides **better remote access** to data and simplifies Business Intelligence processes.
- A visual map with elements specific to employees' own jobs takes complexity away from the system's **user experience** and leads to faster adoption.

**"We captured what people do most often, so they can go to their home pages and have a queue of items that are updated. It gives you a shortcut to what needs to be done each day. Users are really excited about this feature..."**

— REBECCA NEWTON — MANAGER OF SYSTEMS AND OPERATION, RSF SOCIAL FINANCE

### NEW ROLE-TAILORED USER INTERFACE AND WEB SERVICES FEATURES PROVIDE PARADIGM SHIFT FOR NONPROFIT ORGANIZATION

RSF Social Finance, based in San Francisco, offers investing, lending and giving services that generate positive social and environmental impact while fostering community and collaboration among participants. Since 1984, RSF has made over \$200 million in loans and over \$90 million in grants to nonprofit and for-profit social enterprises in the areas of Food & Agriculture, Education and the Arts, and Ecological Stewardship. Today RSF has more than 1,000 clients helping to create a shift from financial transactions that are complex, opaque and anonymous to those that are direct, transparent and personal, based on long-term relationships.

RSF first implemented Serenic Navigator in 2004, allowing the organization to better track and manage its diverse funds – from its planned giving programs to investment vehicles. The following year, Serenic DonorVision was added to provide a more comprehensive contact management system than what RSF had previously used to track and manage its important donor relationships.

RSF was the first organization to install Serenic Navigator 2009 and benefit from its enhancements. The updated software system applies Microsoft Dynamics NAV 2009 technology and functionality to Navigator's core features. Navigator 2009 includes a new User Interface (UI) and User Experience (UX) through the use of Role Centers that leverage productivity features within the newest Dynamics NAV platform. Within days of implementing Navigator 2009, RSF's employees were benefitting from the system's great simplicity and new features.



**“Users are finding the new UI is a lot more intuitive. It has the navigation feel of many websites with tool bars in action panes.”**

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## CUSTOMIZED ROLE CENTERS TRANSFORM USER EXPERIENCE

Within Serenic Navigator 2009, Role Centers present specific information based on employees' job functions to help people easily prioritize tasks and make quick business decisions. With an intuitive user interface similar to that of the Microsoft Office system, Role Centers help users navigate quickly to the information, reports and actions they need. Navigator 2009 has content specific to its customers' organizational requirements, and employees can easily personalize their Role Centers to fit their own unique work styles and information needs.

For example, a Role Center for a typical accounts payable clerk includes visual cues of the work she needs to perform, giving the individual user a single, integrated view of the job-specific information and tasks she can see right on her desktop. Notifications and alerts initiated by automated workflows are displayed in each Role Center to keep critical tasks and projects on track. A link for a "new vendor" takes the clerk straight to what she needs to enter for a new vendor relationship and becomes part of a managed list of vendors she is responsible for in her Role Center. An alert saying "28 invoices due today" helps prioritize tasks and manage deadlines.

When Navigator 2009 was installed, RSF created seven different roles defined by groups of employees and their main activities. "We captured what people do most often, so they can go to their home pages and have a queue of items that are updated," said Rebecca Newton, RSF's manager of systems and operation. "It gives you a shortcut to what needs to be done each day. Users are really excited about this feature and that it incorporates Outlook. One user used to keep her task list on an Excel spreadsheet, but she moved it into Outlook so she can see her to-do list in her Role Center and check off tasks as she completes them."

RSF created Role Centers in Navigator 2009 including:

- Accounting Manager
- Client Development
- Controller
- Junior Accountant
- Philanthropic Services
- Staff Accountant
- Strategic Development

Personalization of Role Centers accommodates organization-specific functions. For example, RSF's Philanthropic Services Role Center automatically queues up the week's pending grants to be reviewed and processed, making this weekly task much more efficient. Philanthropic Services also created saved views to quickly display the information required to answer frequently asked questions— providing easier "at-your-fingertips" access to information. Views are created by utilizing multiple filter levels to display only the data a user wants to see. The filter settings used to create the view are then saved for future access. This allows the user to return to an updated pre-filtered view of the data at any time by accessing the saved view. Data is automatically refreshed to show only current information each time the view is accessed.

**“I was surprised at how easy this transition to the new UI was... Everyone is having a good time with it!”**

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Personalization also allowed RSF’s Strategic Development role to be shared by its CEO and Strategic Development Manager to enable easier access to information they both need, including links to prospects’ websites and custom reports residing on internal servers.

### **EASY-TO-USE INTERFACE IS FAMILIAR**

Typically, changing an organization’s UI results in down time and lost productivity among frustrated users who have to change everyday work habits. At RSF, however, users have found 2009’s UI very easy to use, and the new look and feel of Navigator 2009 has helped them get up to speed quickly.

The familiar UI offers intuitive navigation and makes it easy to find information, helping to minimize training time. Even RSF employees who weren’t able to attend training sessions prior to the system going live, have had few questions about how to use the UI, which is more visually appealing as a result of the extensive research and development that Microsoft built into the underlying framework. They have used 2009’s navigation lists to find information and readily answer their own questions.

“The UI lets you use a search box to find what you need, so you don’t have to know where information lives within the system,” Newton said. “Users are finding the new UI is a lot more intuitive. It has the navigation feel of many websites with tool bars in action panes. Since all of us are hooked on the Internet, it feels more familiar.”

### **IMPROVED REMOTE ACCESS PROVIDES REAL-TIME UPDATES**

Serenic Navigator 2009 provides RoleTailored access to real-time, integrated data and analysis tools that can help individuals make fast, informed decisions. Role Centers give people visibility into relevant business activities, such as tasks, notifications, lists, key performance indicators (KPIs), and reports. Thanks to a new three-tier thin-client architecture and the use of industry-standard Web services, information stored in Navigator is more accessible through a Web browser, thereby enhancing accessibility, availability, and performance.

RSF plans for its CEO to access Navigator remotely through his Role Center to stay current on constituents’ needs in real time.

“We are creating his dashboard to include what he needs to look at, such as the people he needs to call before an event, so he doesn’t have to navigate through the system and just gets what he needs,” Newton said. “Previously, we would have to email data to him or compile information in a spreadsheet. Now his tasks outside the office can be more integrated with the tasks he’s doing while in the office and he can access by simply connecting to our SQL Server via VPN and launching the RoleTailored Client from his desktop.”

Basically, the user connects to the server via VPN and then launches the RoleTailored Client from his or her laptop (stored locally) and connects to the server by specifying the IP address. The remote user connects the same way as someone in the office, via the RTC, with the exception of having to establish a connection to the SQL Server via VPN.

## 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](http://www.serenic.com).

## SIMPLIFIED USER EXPERIENCE SAVES TIME

RSF employees saw the value of working from their Role Centers right away. Having a visual map with elements specific to their own job has taken the complexity away – providing the power of an ERP system without the sometimes overwhelming sense of difficulty. Fields and functions not required by a specific role can simply be hidden. This has made user adoption fast, as Role Centers simplified tasks across the organization.

“Before, you could get into the database and still have to navigate to get what you want,” Newton said. “Now, you’ll get a robust list of what you use most often in the system. So people like our CEO can be more informed and not have to wait for others to look information up for him. This will encourage folks who used to use our system just a few times a month to get info they need more often. They will eliminate a lot of back-and-forth in their days.”

Newton notes that for RSF’s accounting team, there is a lot of opportunity to save time with reports they used to print out. With Navigator 2009, “pending” information is much more visible in the system. RSF’s accounting manager can look at her dashboard to see what’s not posted yet and can easily review and post.

“Everyone is taking ownership and making it their own,” Newton said. “I was surprised at how easy this transition to the new UI was – everyone was using the new system and finding the information they need with very few questions. It was business as usual, and it’s really fun to use. Everyone is having a good time with it!”



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