**SERENIC®**
**SOFTWARE**

# Serenic® Navigator Creates Efficiencies For American Urological Association

*"Serenic Navigator for Microsoft Dynamics NAV solved our reconciliation challenge. Our old system didn't have the flexibility to get to the data we needed. Now we can easily access data and provide reports to management and the executive team. They can easily drill down into the data to get to the information they want. Our entire team is much more efficient."*

— **BARBARA HARTFORD,**
**AUA FINANCE DIRECTOR**

According to the American Urological Association (AUA), every physicians' specialty group needs a support system to allow doctors to network, collaborate and increase educational opportunities. Urologists in the United States and around the world recognize the AUA as that system.

Based in Linthicum, MD, just outside of Baltimore, with 120 employees and $33 million in annual revenue, the AUA was founded in 1902 as the premier professional association for the advancement of urologic patient care. The association works to ensure that its more than 16,000 members are current on the latest research and practices in urology. The AUA also pursues its mission of fostering the highest standards of urologic care by providing a wide range of services, including publications, research, continuing medical education, an annual meeting and the formulation of health policy.

## Scenario

The AUA has three groups under its organizational umbrella:

- **AUA Inc. - Memberships** – Provides a portion of annual revenue

- **AUA Education and Research, Inc.** – Organizes the group's annual meeting as well as provides continuing medical education (CME) courses for physicians' certifications and publishes multiple publications, including The Journal of Urology and AUANews

- **AUA Foundation, Inc.** – Receives individual and corporate financial contributions and grants to enhance the Foundation's mission and fund research scholarships

The AUA's nine-person accounting staff is challenged with overseeing the financial activity of these three diverse groups structured around more than 300 programs that operate as separate profit and loss centers. The accounting and finance department reports data back to all of the AUA departments – tracking revenue and expenses in comparison to budgets.

"The accounting system we were using had outlived its lifecycle," said Mark Welsh, regulatory and reporting manager. "The product was discontinued, so there were no enhancements and it didn't keep up with the technology of Windows. We needed a solution that was flexible enough to grow with us and was more up to date."

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> **REGULATORY AND REPORTING MANAGER**

The AUA had lots of add-ons and disparate systems. "We were using a patchwork quilt that had been pulled together and didn't always jive," said Barbara Hartford, finance director. "When management asked for a report, accounting had to pull the data and then recreate it in Excel – a cumbersome process that led to reconciliation problems."

A key feature that the AUA was seeking in a new financial management system was deferred accounting. In its search, the AUA found that Serenic Navigator was the only software that demonstrated the ability to provide this feature. The AUA was also impressed with Serenic's partner, AVF Consulting. "AVF brought its implementation consultant on the sales call to make sure the company had a full understanding of AUA's deferred accounting needs before we bought," said Hartford. "We were impressed and felt assured that AVF could follow through with what we were told."

# Benefits

Since going live with Serenic Navigator in January 2007, the AUA has seen productive results:

**Time Saved**. "Ultimately, we're saving lots of time," said Hartford, who estimates the AUA accounting team saves a day's time each month to run nearly 300 monthly P&L reports. They can now schedule to run the reports overnight. It takes only an hour to an hour and a half to send them out with  notes. Another day is saved producing company-wide monthly reports. Serenic Navigator's Business Rules feature has enabled fewer mis-matched codes, saving time that used to be spent reclassifying entries. And they save time for reconciliation with Serenic Navigator's search capabilities, which they name as one of its greatest strengths.

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**Functionality.** One of the most important functions that the AUA needed in its system was fully integrated deferred accounting. The AUA manages more than 100 events annually, including its annual conference. Payments for attendance to these events are often received months in advance, but must be deferred to the date of the event and still allow interim reporting (by ultimate revenue/expense account) of the activities leading up to the event. Serenic Navigator for Microsoft Dynamics NAV was the only system reviewed by the AUA that easily provided deferred accounting functionality.

**Data Easily Transferred.** Serenic Navigator for Microsoft Dynamics NAV easily interfaces with TIMSS, the AUA's membership management system, to transfer data between TIMSS and the organization's bank. Serenic Navigator accepts positive pay and cleared check bank files. It also accepts general ledger and refund  files from TIMSS and passes the check data back to TIMSS.

**Fund Accounting.**  Through the AUA Foundation, there are various named scholarship funds that were previously tracked in Excel spreadsheets. Now, the individual funds are set up and donations and payments are tracked using Serenic Navigator's fund accounting feature.

**Users Empowered.** Accessibility to data exceeded the AUA's expectations. Core users and non-core users alike can get to any data they need and drill down to see details. "There is intrinsic value in accessing the data electronically," Welsh said. "Our associate executive director of IT was the first to rave about Serenic Navigator, calling it 'the best thing since sliced bread.'"

**Value.** The total cost was under the AUA's projected budget and less than what it paid for its previous system.

## About Our Partner

AVF Consulting, Inc. is a full-service Microsoft Gold Certified Partner providing Serenic Navigator for Microsoft Dynamics NAV to nonprofits throughout the U.S. AVF provides companies with a system for success through customer-specific systems design, analysis, development, implementation, training and support. AVF has been offering business solutions since 1986 and was named Serenic's Partner of the Year in 2007. AVF's clients include the Carnegie Institution for Science, Gifts In Kind International, Habitat for Humanity, International Planned Parenthood and many others. For more information, please visit www.avfconsulting.com.

## About Serenic Software

Serenic Software develops and delivers mission-critical ERP software solutions for public service organizations including: K-12 school districts/boards, public sector, nonprofits (NPOs), and international non-governmental organizations (NGOs). Serenic is a Gold ERP and ISV vendor and a development partner for Microsoft. Serenic public service solutions are trusted by over 1,000 organizations around the globe. You can learn more about Serenic Software at www.serenic.com.

SERENIC® SOFTWARE

USA | Canada | UK
marketing@serenic.com
www.serenic.com

**TF:** 877.737.3642
**TEL:** 303.980.6007

Microsoft Partner
Gold Enterprise Resource Planning