

CUSTOMER CONNECTIONS



SCHOOL DISTRICT PROFILE

- » Public school district located in eastern Pennsylvania
- » Rural and suburban area
- » About 7,200 total students
- » 26 schools including:
 - 1 high school
 - 2 middle schools
 - 7 elementary schools

BENEFITS

- Flexible. Allows the district to generate its own budget unit numbers and control the ways users interact with the system.
- Easy to use. Intuitive interface offers access from any computer. New users can be trained rapidly by Boyertown staff.
- Secure. Controls allow authorized employees to access as many or few functions as necessary.
- Powerful reporting. Accurate and timely reports give district leaders more involvement in—and responsibility for—their budgets.

eFinancePLUS SOLUTION

- Accounting and Procurement
- Payroll & Personnel
- Employee Access
- Miscellaneous Billing
- Dashboards
- Integrated Reporting

Boyertown Area School District Upgrades its Financial Information System

Boyertown Area School District needed a more reliable way to account for its budget and personnel. But when they implemented **eFinancePLUS** from SunGard K-12 Education, they got a whole lot more than an accurate set of books. The customizable account structures, powerful reporting tools, and secure, intuitive interface in **eFinancePLUS** allowed educators to gain a better understanding of their departments' funds.

"**eFinancePLUS** has made our financial information more accessible throughout the district," said Dave Szablowski, Boyertown's Assistant to the Superintendent for Business Affairs, "so managers have begun to take ownership of their own budgets."

Choosing a financial system to meet the district's needs

On his first day as Assistant to the Superintendent for Business Affairs, David Szablowski knew Boyertown Area School District needed to upgrade its financial system. "I asked my assistant to print out a trial balance," Szablowski recalled, "And the report was marked with hand-written edits." The very first line item, cash, was crossed out and different number was penciled into the column. When he inquired about the correction, he received the reply, "Well, the system we're using can't calculate cash properly."

Szablowski and his team soon began a search for a new financial management system. After reviewing about a dozen competing products, Boyertown selected **eFinancePLUS** from SunGard K-12 Education. **eFinancePLUS** is an enterprise-wide financial and human resources solution that leverages a single, district-wide database.

Szablowski's team chose **eFinancePLUS** because it offers both flexibility and precision. "We were able to design a custom account structure that makes sense to the people who use it," said Szablowski. "And it has powerful controls for keeping our funds straight."

"**eFinancePLUS** has made our financial information more accessible throughout the district."

DAVE SZABLOWSKI
Assistant to the Superintendent for Business Affairs,
Boyertown Area School District

Helping the whole district become aware of finance

Szablowski sought a system with good workflow logic because he wanted more people in the district to be aware of how their budgets are being used. Finances play an important role in every department of the school district, Szablowski believes. For example, facilities managers must monitor heating costs. Academic departments must budget for teacher training. The healthcare staff needs to track the cost of supplies. And principals have to account for all of the money going into and out of their schools.

In most districts, however, few people outside of the finance department have a close familiarity with fiscal resources, projections, and trends. After all, their primary goal is educational, not financial. School employees don't often have time to pore over balance sheets and purchase orders.

Financial reports that actually get read

But in Boyertown, educators are presented with convenient, easy-to-read financial reports created using **eFinancePLUS**. Those convenient reports allow educators to begin to see the relationship between their budgets and their scholastic objectives. The information has helped the educators make decisions that are financially—as well as pedagogically—sound. "Every principal, department director, and supervisor gets information delivered right to them that shows them what they're responsible for, and that's made them much more conscientious," said Szablowski.

WHAT OUR CUSTOMERS ARE SAYING

Watch our SunGard K-12 Education customer testimonials here:
youtube.com/user/SunGardK12Education



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The **eFinancePLUS** monthly reports have raised the financial awareness of Dan Goffredo, Principal at Boyertown Area Senior High School. "When he first started receiving the reports, he was amazed to learn where the money was going," said Szablowski. "Now he looks at the reports every month and they've become an important factor in his decision-making."

Informative data categories

eFinancePLUS helps Boyertown create informative financial statements because of the effective ways the system allows users to enter the information in the first place. "Logic in, logic out," said Szablowski. He and his team created a detailed yet straightforward system of account numbers, or ASN numbers, that describes and categorizes each transaction.

The Boyertown ASN numbers (which can also be called budget unit numbers) effectively describe a whole range of attributes. ASN numbers in other systems may track schools, departments, and funding sources. But the ASN numbers at Boyertown go beyond that to define grade levels, subject matter, and even the title of the person requesting the funds. This coding system allows district employees to track, monitor, and review their finances in greater detail than ever before.

Logical ASN numbers

With so many layers of information embedded in each ASN number, one might think the system is complex to use. But Szablowski reports that the SunGard K-12 Education system is actually significantly more user friendly. "Before, everyone had to know fifty to a hundred different ASN numbers," said Szablowski. What's more, those numbers were virtually random, so they carried little meaning. Users simply had to memorize by rote the codes they used on a regular basis.

"The **eFinancePLUS** system has logic built into it," said Szablowski. "Now, to use the system, we only have to know about

twenty numbers." And those numbers are no longer arbitrary. "The first two digits signify the building, the next four represent the department, such as regular instruction, facilities, the principal's fund, or special ed," explained Szablowski. The rest of the digits signify other details that classify each item.

District staff can access ASN numbers through a convenient table lookup, but because Boyertown designed the numbering system to be easy to decipher, many people have memorized the numbers they use most often. Others have learned to identify an item's attributes simply by reading the ASN number. "It's easy to learn," said Szablowski. "Four or five people originally received training from Public Sector. Now they just turn around and show the new people how to use the system."

Convenience and speed

Conveniences such as wizards help walk users through more complicated tasks. District administrators can easily monitor daily fiscal performance and human resources information since data that was once buried in filing cabinets now appears on computer screens throughout the district.

eFinancePLUS also automates purchasing and bidding, which greatly speeds up the process. "Before, reqs were done manually and printed on NCR paper," said Szablowski. The requisition packets had to be physically passed from desk to desk for signatures. Now, requisitions and proposals are all sent electronically through the **eFinancePLUS** system in a fraction of the time. "If we have an immediate need," said Szablowski, "I can log on right away, approve it, forward it on to the purchasing clerk for an OK, and it's done in five minutes."

About Us

SunGard K-12 Education is a leader in the K-12 Education Industry, providing secure, web-based, and reliable software solutions for student management, financial and human resources, learning management, and special education in K-12 schools.

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DAVE SZABLOWSKI
Assistant to the Superintendent for
Business Affairs,
Boyertown Area School District

SunGard K-12 Education currently works with over 1,500 school districts around the country to deliver K-12 software solutions, designed specifically to support student achievement.

To learn more:

Visit: sungard.com/K-12

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