

## Wetaskiwin Regional Division No.11, Wetaskiwin, AB

“Before TeamBudget software our budgeting process extensively utilized Excel spreadsheets, which required versions of files to be emailed back and forth between the budget creator and the budget administrator. It was time consuming and prone to human error. TeamBudget reduces the possibility of error, streamlines the budget consolidation process, saving a significant amount of time, and provides real-time access to budget information. .”

Sherri Senger, Associate Superintendant: Business

### Customer Overview

Wetaskiwin Regional Division No.11 is situated in central Alberta, approximately one hour south of Edmonton.

The school division serves the city and county of Wetaskiwin, operating 18 public schools in Wetaskiwin, Millet, Gwynne, Alder Flats, Pigeon Lake, and surrounding areas.



### Business Challenge

Wetaskiwin prepares two budgets annually. The first is developed in the spring, and is based on projected student enrollment, addressing staffing and other budgetary needs. Once the student enrollment is finalized in September, the second budget iteration is prepared and submitted to the government at the end of November.

The budget was compiled in Excel and included approximately 50 worksheets for each of the various departments involved. Once the revenue figures were established, individual budget sheets were sent to the managers to fill in the details of their budget. Completed budgets were sent back to finance individually. The finance team then undertook the long process of manually entering the budget data from these 50 worksheets, compiling the information in order to forward a consolidated budget to government.

While entering the budget data into Excel is a straightforward process, there are many difficulties with this approach. Manually entering the data leaves a lot of room for human error, through incorrect keystrokes and missed links.

It is also very time consuming, preventing resources from working on other initiatives.

Spreadsheets are a static method of storing budget information that lacks the history of how it evolved, who participated in the process and why it was approved. There is no mechanism to track changes or budget amendments and discover why changes were made—the context or impact of many budget changes made under a single initiative aren't available.

Additionally, there is no method in Excel for tracking historical data, to understand why certain amounts were established, by whom and when. The process of justifying dollar allocations can be time consuming. The ability to include this information for reference, both in the current budget year and in future years, saves time and resources later on.

### Solution

Wetaskiwin Regional Division No.11 knew they needed a solution that provided them with a more dynamic approach to budgeting. Bellamy Software presented the TeamBudget solution, and they realized it had many of the elements they required, and that the ongoing evolution of the product meant that they would be able to further leverage the solution in future.

### Overview:

#### Student Population

3,900

#### Financial System

Bellamy

#### TeamBudget Capital and Operating

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#### Business Challenge

Wetaskiwin knew they needed a solution that provided them with a more dynamic approach to budgeting.

#### Solution

Wetaskiwin realized TeamBudget offered many of the elements they required and the ongoing evolution of the product would bring more benefits as they continued to use it.

#### Business Benefits

- Real Time Budget Information
- Time Savings
- Accuracy of Data
- Easy to Use
- Customer Support

#### For More Information

Further information on the TeamBudget Suite can be obtained at [www.teambudget.com](http://www.teambudget.com)

## Business Benefits

Wetaskiwin prepared its 2010 budgets using TeamBudget, and enjoyed numerous benefits.

In the next phase, they are planning to leverage the first year of their budget activity and use TeamBudget to refine the accuracy of their future budget forecasts.

“TeamBudget is user-friendly and easy to learn. It only took six days to train 25 hands-on users.”

Sherri Senger

### Real Time Budget Information

Budget data is stored in TeamBudget’s database, integrating with Bellamy’s financial system. The result is immediate, up to date budget data.

This allows users access to immediate, up to date budget data. The process of updating their actual costs is as easy as the click of a button.

TeamBudget pulls budget data from the financial system nightly, making the process of understanding your variances (actual vs. budget) simple—it’s all right there.

### Time Savings

Typically, budgets compiled in Excel need to be recreated from near-scratch each year. TeamBudget allows you to roll the current budget forward into the new year, which eliminates a great deal of the data entry. Associated documents and links are automatically rolled forward as well.

At any point in the budget process, changes can be made, without the back and forth typically required with a paper or Excel based system. Budgets can be locked down from unapproved changes, but when “unlocked”, managers can make adjustments to their own budgets as needed.

The double entry process of manually compiling all 50 budget sheets again into one master file is eliminated.

Immediately, a huge times savings can be seen.

### Accuracy of Data

Because the budget data is stored in a database, linked or associated figures are automatically updated, and when a change is made to the data, all dependent data is automatically updated too. Validating the data is no longer a manual process of searching all Excel spreadsheets to make sure links are also updated.

### Easy to Use

TeamBudget was designed to mimic the look of Microsoft software, which immediately gives users a sense of comfort. The software is intuitive so the process of training users is very straightforward— TeamBudget was rolled out to all 18 Wetaskiwin schools in just six days.

The reaction of the users has been positive and they’ve indicated they like using it.

TeamBudget provides over 75 out of the box reports, eliminating the skills, knowledge and upkeep typically required with running reports in Excel. TeamBudget automatically compiles the data to run any chosen report, and allows users to decide which data to capture in the report..

### Customer Support

Wetaskiwin has been pleased with the level of support provided. With any implementation, issues came up, but the teams at Questica and Bellamy have been quick to respond and work through a solution with the school district.

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## For More Information

TeamBudget Suite is a secure web-based solution structured on a proven capital and operating budgeting model.

Working in conjunction with the public sector, **TeamBudget Capital** and **Operating** were designed to solve the cumbersome process of assembling, tracking, analyzing and reporting of capital and operating budgets.

Further information on Questica's **TeamBudget Suite** of products can be obtained at [questica.com](http://questica.com)