

Education Analytics Streamlines Financial Reporting and Improves Efficiency with Solver

Education Analytics is a mission-driven organization that partners with state education agencies, school districts, and education nonprofits to transform data into actionable insights. The organization helps education leaders make evidence-based decisions to improve student outcomes through sophisticated data analysis and reporting solutions.



INDUSTRY

Education / Nonprofit

ERP

Multiple Systems

“ Solver does exactly what it says it can do – it makes it easy to edit reports, allows users to display the reports in their desired format, and it is Excel-based. Our users are already familiar with the design capabilities and can get quickly up to speed using it. ”

– **Eric Cramer**, Finance Manager

THE CHALLENGE

Education Analytics leveraged Adaptive to manage their financial planning and reporting, but the system proved to be bulky and cumbersome for their needs. The organization had resorted to home-built reporting using custom code and Excel spreadsheets. The available financial reports were just too restrictive and limited primarily to the finance department, making it difficult to share insights across the broader organization.



The team didn't have the ability to design their own reports or create comparative ones, which extended the amount of time needed to produce reports. As a workaround, they continued relying on manual Excel processes whenever they needed additional reports. Education Analytics needed a more flexible, intuitive solution that could aggregate data across multiple dimensions from their ERP while providing accessible reporting to users beyond the finance team.

THE SOLUTION

Education Analytics selected Solver to replace their existing Adaptive system and consolidate their financial reporting infrastructure. The decision was based on several key factors: Solver's Data Warehouse would allow the organization to aggregate data across dimensions that come from their ERP, and the Excel-based reporting interface would provide the familiarity and flexibility that users needed. Eric Cramer states that Solver performs very well when it comes to managing Education Analytics' critical financial processes. Specifically, the organization uses Solver to manage their financial data, reporting across different fields and data sources. What they really like about the whole new process is that data retrieval is quick and efficient. Solver can pull the data as a whole whenever they run reports, he explains.



The transition to Solver gave the team the flexibility to create customized reports quickly while maintaining the familiar Excel environment that users were already comfortable with. The increased flexibility to design their own reports has been a key factor in user satisfaction. Users can now choose how they want to display their data based on the audience type that will view it.

THE RESULTS

The benefits Education Analytics has experienced since implementing Solver have been significant. Solver has done a lot to improve efficiency both inside the finance department and more broadly across the organization. It has really improved the organization's ability to share key data with leadership and management teams.

The Excel-based reporting interface allowed Education Analytics to expand financial reporting beyond the finance department. Reports that were previously limited to finance team members could now be shared with stakeholders throughout the organization, improving transparency and enabling better decision-making.

The team no longer fills out manual spreadsheets, and reporting times have been significantly reduced.

Solver's ability to aggregate across multiple dimensions and integrate various data sources provided Education Analytics with unprecedented flexibility in how they analyze and report on financial data. The team can now create customized reports across different fields and data sources with ease.



Overall, the results have been well worth the investment. Education Analytics has saved both time and resources, improved efficiency, and provided impactful results that support their mission-driven work. The migration from Adaptive to Solver eliminated time-consuming manual reporting processes, allowing the finance team to focus on higher-value analysis and strategic initiatives.

"I describe Solver as both flexible and intuitive," shares Eric. The organization plans to continue expanding their use of Solver to even more reporting capabilities in the coming year.

