

## MYOB Greentree

Client General Practice Training Tasmania Inc. | Location Australia |  
Product MYOB Greentree | Industry Not For Profit



### ERP makes practice almost perfect

General Practice Training Tasmania (GPTT) is a not-for-profit organisation that draws most of its funding from the Department of Health to train general practitioners in the island state. At any time it can be responsible for around 150 doctors training to be GPs, running workshops that provide the non-clinical element of their training.

#### Problem

##### Tricky cost centres, labour-heavy reporting

"I have to deliver monthly reports to our board, as well as regular reports to the Department and other funding providers," explains Tricia Minck, Director Corporate Services. "We have to manage numerous cost centres and we also needed to improve our approvals system. MYOB Greentree offered the solution to these and other issues."

When Tricia joined GPTT, it was working around its cost centre management problems by listing each centre as a job, in order to keep them separate. However, that part of the legacy system wasn't designed for that role; it was creating extra work and paper, requiring too much manual entry to keep figures up to date.

"We have to be able to report to the Department on the direct and indirect costs of training, general administration and programme administration, the cost of running our training workshops, and more," says Tricia. "Our board of directors is another cost centre and we have to report on them separately."

Tricia was spending too much time extracting data from the system and manipulating it to compile the budgets. This manual work on spreadsheets brought a risk of errors, and then she'd have to spend more time examining the budgets line by line when the figures didn't reconcile.

The approvals process for expenditure was another heavy user of time and paper. Documents would be printed, the code written on them, and then sent to the various cost-centre owners for approval before being entered manually into the system.

"We needed to lift our game and find a system that could automate processes and reduce paperwork," Tricia says.

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#### Solution

##### Integration and streamlined reporting

GPTT assessed its needs: integration, reporting, and electronic data management that any approved person in the organisation could access. A list of specifications was sent out to four software vendors and three were invited to demonstrate: Microsoft Dynamics NAV, Sybiz Vision, and MYOB Greentree.

“Greentree really appealed to me because of its FREE reporting engine,” says Tricia. “The Workflow live desktops and the WebView electronic viewing module were also major points for us, along with having integrated Fixed Assets.”

Today, GPTT is gaining more and more efficiency all the time. Tricia is saving hours of work through being able to drill down into the database to get just what she needs for a regular or ad hoc report. Using FREE, she just updates the data and the reports are generated on the spot. Reconciliations are quickly and easily resolved. The integration of Fixed Assets has removed the need to run depreciation manually and to search for paper invoices.

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## Outcome

### Seamless flow of information, approvals a breeze

“WebView delivers amazing benefits,” she says. “Being able to send reports to the budget centre managers with comments added makes life so much easier. Before we’d have to extract and print them, then circulate the paperwork. Now they just log into WebView, they can see any comments I might have, and add their own for instant sharing. WebView also lets our managers access information themselves, rather than having to ask my staff to do it for them.”

Rules in Workflow Approvals & Alerts send invoices via email for approval, with automatic escalation for approvals of expenditure above a certain limit. Managers also get an automatic email reminder if an approval isn’t returned within three days.

“We don’t have to chase people around for approvals anymore. Everything is being approved before the button is pressed, so we’re eliminating the risk of human error at the data entry point. We’ve already saved ourselves a bundle of paperwork and we’ll save even more as we learn Greentree’s full capabilities.

“MYOB Greentree has improved the standard of our reports considerably. It’s made the running of reports and access to reports so much easier for everyone – that was always my focus and I’m delighted with what it’s helped us to achieve.”

Before	After
+ Reports took too long to extract	+ Reports simple to extract
+ Excessive paperwork	+ Paperwork slashed
+ Cumbersome approvals process	+ Processes automated
+ Cost centre management slow and difficult	+ All cost centres easily updated
+ Unable to budget at cost centre level	