



CUSTOMER:
Civic Assurance



INDUSTRY:
Local Government Insurance



LOCATION:
Wellington, New Zealand



PRODUCT:
Greentree

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CAROLINE BEDFORD, INVESTMENT ACCOUNTANT, CIVIC ASSURANCE

THE SCENARIO

Civic pioneered specialist insurance agency services to local government in New Zealand, with the original company beginning in 1941. Civic continues to provide trusted services to local government, aiming to maximise efficiency so that overheads are kept to a minimum. In the catastrophic earthquake in the Christchurch area, Civic paid to Christchurch City Council what is thought to be the largest insurance claim ever made to a single policyholder in New Zealand history.

It is a complex business comprising numerous entities, with a range of different funds to administer, and stakeholders in local government across the country. These numerous entities all need to have their diverse funds managed separately and with the added complication of having pooled bank accounts.

Civic Assurance had installed Greentree Accounting in 2001 to modernise their accounting solution. It had proven a perfect fit: a robust, reliable and secure financial system that works on Microsoft Windows.

THE REQUIREMENT

“We have a number of separate services that have different funds,” says Civic Investment Accountant, Caroline Bedford. “This is similar to other operations which have different cost centres but need to manage accounts as a whole. We have some shared bank accounts, and some schemes sharing a single account. All of this was getting beyond the range of most accounting solutions.”

The separation between funds was being handled manually with spreadsheets. But Civic had grown in size. This manual processing was appropriate for a simple organisation but had become a tedious process, prone to inefficiencies and leaving room for error. The job also grew in complexity, with additional challenges such as the extra work required for KiwiSaver, the government-lead savings initiative. It was clear that a better way needed to be found.

Greentree provided the essential accounting functions and could easily create a variety of sophisticated financial reports. Now it was necessary to enhance that solution by adding software that could bring the diverse funds into the system in an integrated way. Or did Civic have to change to something new?

ABOUT CIVIC ASSURANCE

Civic Assurance is the trading name of the New Zealand Local Government Insurance Corporation Ltd. It is owned by local government, and dedicated to serving their needs. Civic Assurance offers councils and CCOs (Council Controlled Organisations) financial and insurance services. Civic also administers SuperEasy and SuperEasy KiwiSaver Superannuation Scheme, as well as LAPP – insuring below ground infrastructure, such as river control systems, and flood protection schemes. Civic is also the Fund Manager for Riskpool – providing liability insurance, and a 25-percent shareholder in Local Government Online Ltd.

ABOUT ENABLING

Enabling is the recognised leader in the provision and support of business management applications throughout Australia and New Zealand, especially in the areas of technical and development expertise, solution design and long-term customer service. With offices in Melbourne, Sydney, Brisbane, Auckland, Wellington and Christchurch, we have both strength in numbers and depth of expertise to support organisations of all sizes and with a multitude of requirements. Enabling is one of the largest installers of the Greentree system, and offers a total service solution.

ABOUT GREENTREE

Greentree International is a New Zealand company that specialises in developing effective financial and business management software for medium sized enterprises. For over 20 years, Greentree products have been implemented by the company's extensive Business Partner Network, enhancing the operations of more than 10,000 organisations. The Greentree solution is a powerful yet simple, easily customised, cost-effective business system that is flexible enough to grow. It is a real-time, modular, integrated business management suite, purpose-built and well-matched for Australasian small to midsize businesses. With a Windows-based user interface, Greentree provides seamless integration with Microsoft Office, delivering comprehensive functionality within a familiar operating environment.

SOFTWARE CHOICE

- Greentree Business Software

THE SOLUTION

To solve the diffused accounts problem, Civic's Finance Manager, Roger Gyles, began considering the best approach. He discussed this with Enabling, who had been supporting Civic's Greentree system long term. Enabling's consultant, Philip Morgan advised that Greentree had a solution which appeared suitable: the Quad Accounting module. The module is specifically for organisations with a number of smaller entities that are not set up as separate companies, but must report separately – such as where each branch of a business operates independently. Civic made a more detailed investigation and had a look at the module in action. Civic were very satisfied with their Greentree system, just needing some extra functionality. The Quad module met the requirements, and was easy to use and cost effective, allowing them to stay with Greentree.

Enabling was asked to put the solution into place. "It has been a positive story with Enabling all the way through," says Gyles. "They have been most helpful, including implementing additional Greentree modules as our needs changed."

Implementation was on budget and within the time guidelines, though the complexities of the distributed accounting situation were risking a delay. Implementation began on December 8th, and was completed just after Christmas in 2010.

THE RESULTS

Quad Accounting is used to automatically create journals between "logical companies." Journals are created between borrowed accounts whenever that information is used on a transaction line in a General Ledger account. This avoids the need to establish extra companies and administer intercompany journals, making the process much more efficient.

"I can get a report out now within five minutes, whereas previously it might have taken three days," says Bedford. "It takes a lot less time, provides a lot more accuracy and is more efficient and less prone to error. The information can be sent immediately to our administrative software, making the process significantly more effective."

Improved efficiency makes it possible to reconcile accounts much faster and the task of preparing annual reports is greatly reduced. These elements are important, because the managed investment schemes are growing larger every year, and new legislation continues to add to the reporting load – a situation familiar to many businesses that must comply with regulations.

THE FUTURE

Enabling has begun installing a further module to integrate a specialist insurance software package with the Greentree solution, while allowing for the multiple entities involved. This has Enabling busy writing routines to facilitate the process and automatically transfer data.

"We're not really talking about the future yet," says Bedford. "But there are a few things that we have in mind. We would like to add Payables, for example, though this is difficult with the shared bank accounts."

As the organisation continues to develop and respond to business growth and expanded reporting requirements, Enabling will be there to help them along the way, and Civic Insurance continuing its important role in another 70 years or more.

"We have been extremely satisfied with the implementation, we just love it. I thought Enabling were great. They did what we needed and it was one hundred percent."

CAROLINE BEDFORD, INVESTMENT ACCOUNTANT, CIVIC ASSURANCE

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