AUTOMATING PROCESSES FOR FINANCIAL REPORTING NEEDS SAVES TIME AND MONEY

Southwest Texas Junior College (SWTJC) is a regional, two-year institution serving an eleven county area that stretches from the Texas Hill Country to the US-Mexican border. The main campus is located in Uvalde, a city of 15,000 located in the foothills of the Texas Hill Country. Including four additional campuses and instructional facilities, SWTJC has more than 5,600 students.

Before adopting Synoptix, SWTJC was creating its financial reports by querying the information from the database and then manually creating and maintaining them in spreadsheets. But because of the manual nature of spreadsheet reporting, as well as the many errors to which spreadsheets are prone, SWTJC determined they needed a different reporting method.

According to Anne Tarski, associate dean of Finance, the institution couldn't just set up their reports and save them once, and then not have to do it again. "We tried to make macros, among other things, but it just wouldn't work," she says.

In an effort to extend the benefits gained from implementing their ERP system, SWTJC chose Synoptix as their financial reporting solution to streamline their reporting processes, and create greater organizational efficiency. Tarski says that before Synoptix a board report would take a day-and-a-half every month. With Synoptix the process has been completely automated. "Now I can just tell Synoptix to go in and automatically generate the

PROFILE:

- Uvalde, Texas
- Enrollment: 5,600
- www.swtjc.edu

CHALLENGES:

- Streamline reporting processes
- Create greater organizational efficiency
- Reduce errors and redundancies

SOLUTION:

- Synoptix

RESULTS:

- Replace manual processes with automation to save time
- Access the details of the general ledger easily with extensive drill down features
- Create a daily cash report in addition to monthly reports
- Run reports by department, fund, and individual

> ## "Now I can just tell Synoptix to go in and **automatically** generate the board reports for me. The **time savings** have been **huge**."

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Associate Dean of Finance
Southwest Texas Junior College

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In addition, Synoptix has made getting into the details of the general ledger easy with its extensive drill down features. "The drill down feature has really been helpful, especially when I have someone in my office with a question on their expenses or accounts. I can quickly drill down and say, 'This is what happened'."

Running all the monthly reports everyone needs at SWTJC has been greatly simplified with Synoptix. Tarski notes that once the reports have been written, she can now easily run them by department, fund, individual, or whatever else is necessary, all without having to re-write each report. "If you have to set it up every time, that's not helpful. The great thing about Synoptix is that it eliminates this hassle completely." So when there's a meeting with a division chair, for example, she knows the appropriate reports are already written and available for use. "All I need to do is run and print the reports before I head into the meeting," she explains.

In addition to her monthly reports, Tarski has been able to create a daily cash report. With so many banking accounts, SWTJC needs to know who paid what bills, how much came out of the payroll, and what was going where. "That report is extremely helpful to me," she says. "I can come in in the morning and say, 'OK, this is what happened yesterday'. It's been such a huge help."

Commenting about the Synoptix training, Tarski points out that the trainer was "absolutely fabulous. We had our training one day, and the very next day we were writing our own reports, which allowed us to actually start using them immediately after." SWTJC was able to jump right in and enjoy the benefits of Synoptix almost immediately. "I would whole-heartedly recommend Synoptix for an institution's financial reporting needs, as well as the training that Synoptix provides," she says.

ABOUT COMPUSOFT DEVELOPMENT

CompuSoft Development, makers of Synoptix, is a leading developer of enterprise reporting software for the ERP, financial, distribution and accounting sectors. Our products allow accountants and managers to maximize productivity through reporting tools that are easy to use, and provide quick access to the necessary data they need to make critical business decisions.