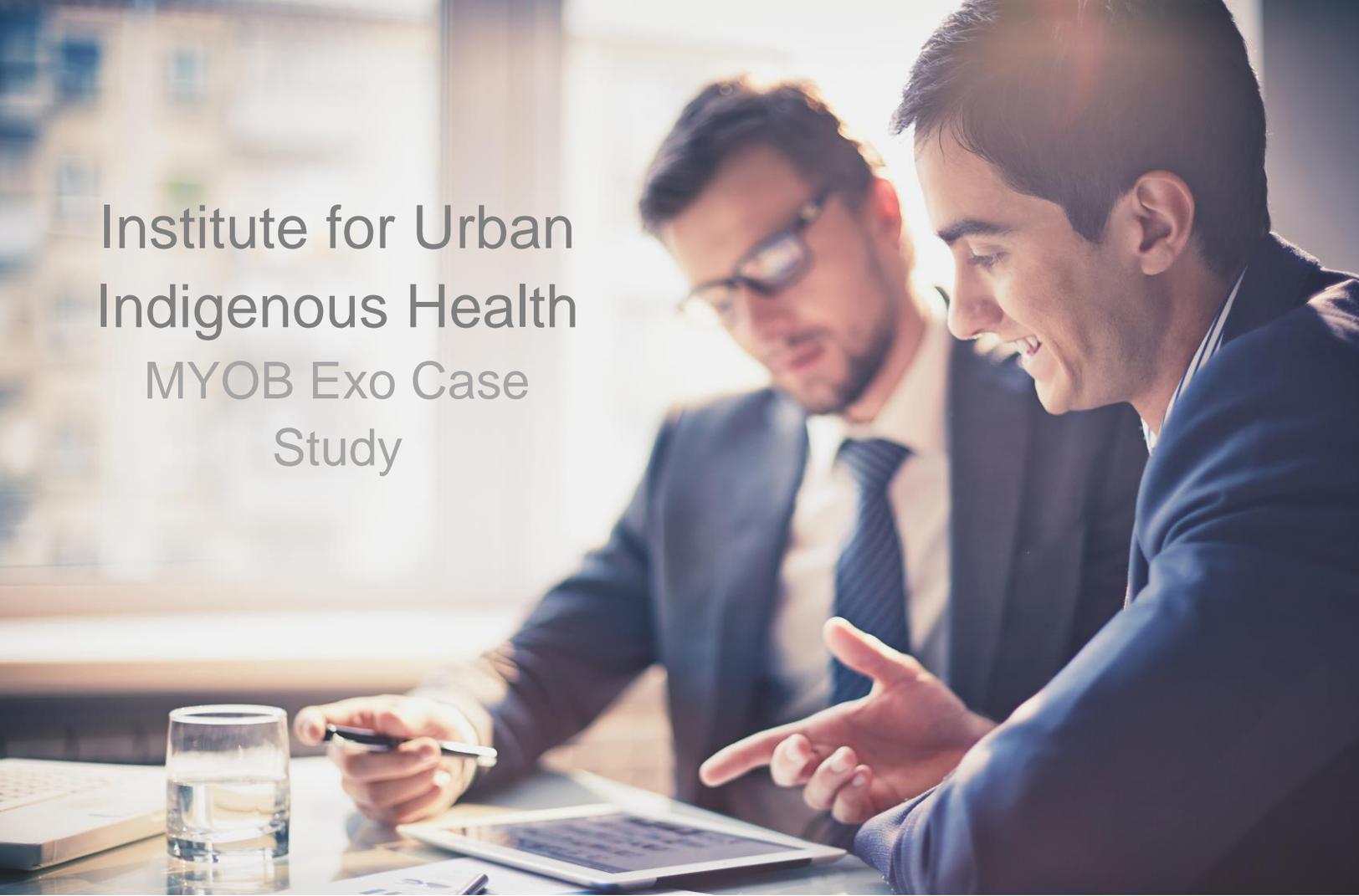


# Institute for Urban Indigenous Health MYOB Exo Case Study



Not for Profit Community Health



**myob**

Exo  
Platinum  
Partner



***'Branch Reports developed using the Clarity Reporting function are generated directly out of MYOB Exo in minutes.'***

**Melanie - IUIH Finance Manager**

## Summary

The Institute for Urban Indigenous Health (IUIH) leads the planning, development and delivery of comprehensive primary health care services to the Indigenous population of South East Queensland (SEQ).

The Institute was established in 2009 and has since rapidly grown with staff numbers steadily increasing from 50 to over 400. With such rapid growth, IUIH organically outgrew their accounting system, MYOB AccountRight Premier (MYOB AR), and looked to ERP solutions to meet their evolving business and government reporting requirements.

Reporting was a key driver for the change to MYOB Exo Business with the ability to manage their funding programs as Branches and the potential to reduce the extensive amount of time spent on reporting. The implementation of MYOB Exo has seen that potential become reality and has resulted in great outcomes for IUIH.

## Challenges – Funding and Budget analysis

IUIH’s reporting needs required them to rely extensively on the Job Codes function in MYOB AR so they could track the performance of over 100 funding programs. Limitations of the system meant that they could not enter individual budgets and other key information relating to each funding program in MYOB AR. As a result, they could not report on their funding programs within MYOB AR leading to the management of all finance reporting in Microsoft Excel.

To produce their reports, all financial data had to be manually rekeyed into Excel. IUIH’S Finance Manager, Melanie, said that *“as a smaller organisation this process was inefficient, but manageable. However, with the growth in the number of programs IUIH is delivering, it was taking two full days of data entry to produce our finance reports, which is not sustainable long term.”*

With such huge growth in staff, IUIH also struggled to manage their payroll in MYOB AR and sourced MicroPay as their new payroll solution. Integration between the two systems was proposed to post payroll journals into MYOB EXO to provide a complete solution.



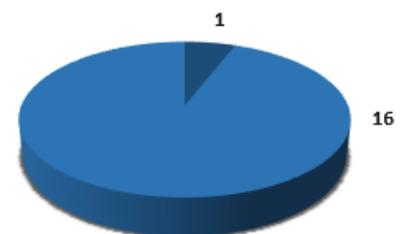
## Outcomes – Customised reporting on show

The key focus of the MYOB EXO implementation for IUIH was the ability to quickly produce reports on their funding programs without additional data entry. We were able to achieve this through the use of Branches in MYOB EXO which allowed them to specify whole transactions and/or lines of transactions against the correct funding program Branch, effectively replacing the Job Code function of MYOB AR.

The standard Branches function was further enhanced by adding additional fields to the Branches table so IUIH could add extra information about each funding program for use on their reports. Additionally, IUIH could store multiple budgets against their funding programs where previously in MYOB AR they could not store budget data at all. Having all of the data available in MYOB EXO gave EXOBIZ the flexibility to write the reports as requested.

IUIH’s reporting required specific formatting and output to PDF resulting in the use of custom clarity reports for various Profit and Loss statements (P&Ls). Reports could be generated per individual funding

**Hours Required for Reporting**



■ EXO Monthly Reports ■ AR Monthly Reports

**Time saving of 15 hours per month**

program as well as various consolidated P&Ls for particular funding bodies. EXOBIZ wrote custom SQL queries to extract actual and budget data required for the reports, as well as the option to select which budget IUIH wanted to display on the report.

The custom reports for IUIH have provided excellent outcomes. Melanie reported that *“Branch Reports developed using the Clarity Reporting function and are generated directly out of MYOB Exo in minutes”* and that a complete set of Finance Reports now takes only an hour. This is a process that previously required two days of effort to produce.

IUIH’s simultaneous implementation of MicroPay was a great success. Initially the two systems were to be integrated however IUIH soon found that the copy and paste General Journal feature of MYOB EXO would be a more efficient solution. The accounting journals are now simply extracted from MicroPay and copied into EXO for posting, a process that takes minutes to complete.

## IUIH’s Implementation Experience

*“Our EXOBIZ Implementation team were great to work with. We had specific outputs that we required from the new system and through discussion and training we were able to have the majority of our requirements (e.g. custom reports, branch budgets) in place for when we went live. Following our go live, there were a few refinements that we needed to make so that our reporting could be as automated as possible and the Implementation team were quick to respond and provide guidance.*

*Our downtime during the conversion process was minimal and we structured our go live with our consultants to minimise the amount of parallel data entry. The ongoing support we have received has been great – any issues were quickly rectified and the Clarity Reports have been so good, that we developed a whole heap more and will continue to build exception reports to assist in the end of month review process.”*

See the excellent work that IUIH are doing for the indigenous community of SEQ at their website

<http://www.iuih.org.au/>

