CaseWare Cuts One Month Off Greenville County’s Reporting Cycle

Located along the northern border of the state, Greenville is South Carolina’s largest county, with a population approaching 500,000. The county has seen tremendous growth over the last decade, and is now home to international companies including Michelin and 3M.

With an annual budget in excess of $132 million, the county is categorized as a Phase 1 government entity for financial reporting. The County takes its financial reporting responsibilities seriously. Not only does it maintain an AAA credit rating, it has received the Certificate of Achievement from the Government Finance Officers Association (GFOA) for 21 consecutive years. To keep its financial reporting accurate, efficient, and transparent, the financial reporting solution Greenville County selected is CaseWare Government Reporting.

Saving One Full Month

“We are charged with ensuring our reporting is accurate, complete, and compliant—which is a big task with a lean staff,” explains Angela Roache, Director of Financial Operations for Greenville County. “CaseWare has made this task much easier. In fact, we shaved a full month off our reporting cycle in the very first year of using CaseWare.”

Out With Spreadsheets

Like many organizations, the County had been using a complex array of spreadsheets and text documents to compile both its Comprehensive Annual Financial Report (CAFR) andPopular Annual Financial Report (PAFR). The CAFR alone is more than 200 pages long, making the effort involved in its production significant.

“Year end is already an extremely busy time for us, but each year we had to rework each spreadsheet and every Word document,” recalls Roache. “And one simple change meant we had to revisit every page.”

Even seemingly simple aspects of creating the reports, such as page numbering, spacing, and font consistency were a challenge when assembling the pages that combined data from multiple sources.
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Angela Roache
Director, Financial Operations
Greenville County

About CaseWare International Inc.

Accountants and auditors in practices large and small, in corporations, and government recognize CaseWare International as the premier creator of assurance, reporting and analysis tools. In over 130 countries, the CaseWare family of products helps accounting professionals perform their work more easily and efficiently.

and individuals. “We knew there had to be a better solution,” says Roache. “And we found that solution in CaseWare.”

The company received marketing material in the mail from CaseWare and decided to give the company a call. “We had a list of what we wanted the application to do, but were skeptical that any one software product could handle it all,” Roache recalls. “However, CaseWare had answers for every item on our list. After that one call, we were convinced.”

Immediate Time Savings

Roache notes that the initial setup and import of data into CaseWare took time, but the rewards are worth it.

Immediately, Greenville County found that CaseWare saved time, effort, and frustration. “One simple change might take us half of day with our old way of doing things. In CaseWare, it is instantaneous. The numbers flow to the correct places automatically,” says Roache. “We have cut our financial reporting time in half and are easily saving a month of effort each cycle.”

In second and subsequent years, the time savings grow. “We save another week by not having to manually roll forward our data to the new year,” explains Roache. “CaseWare does it for us automatically.”

Optimize Reporting Accuracy

The accuracy for which Greenville County’s financial reports are known required an excess of due diligence with the old system. “Numbers from one spreadsheet flowed into the others, but if we missed just one update, our numbers could be wrong and we would need to spend hours researching to find and correct the error,” says Roache.

By eliminating the need to make data changes in multiple places, the opportunity for error is greatly reduced. “No more hand calculations,” Roache notes. “We put our formulas in CaseWare and it performs the calculations and comparisons.”

Professional Support

Roache praises the support the County has received both directly from CaseWare and through Gray & Associates, CaseWare Certified Consultants and Trainers, who helped with the initial template setup and training. “Since then, we have required very little support,” she says. “We got it set up correctly from the start and it works beautifully.”

Increased Efficiency

By utilizing CaseWare to streamline and automate its annual reporting tasks, Roache says that her team now has more time to spend analyzing and comparing the data and looking for even more efficiencies. “We did not have the luxury of this type of analysis before,” she says. “CaseWare buys us the time to look beyond the numbers and make better financial decisions.”

She concludes, “We are always looking for ways to increase our effectiveness and our efficiency. We need to remain lean and work smart. CaseWare is a big contributor in this initiative. It is definitely the way to go.”