Combining Viewpoint and Global Software Inc.’s Spreadsheet Server as an integrated technology platform delivers efficiencies and exceptional reporting for one Michigan contractor.

A major challenge that many contractors face when it comes to their technology platform is achieving a seamless integration or “partnership” between two different software systems. When partnering an ERP software suite that contains all of a business’s critical project and financial data with a reporting, estimating or other management tool, serious problems can occur if the two systems aren’t talking. Detroit area Ready-Mix concrete supplier, McCoig Materials has discovered a perfect synergy between Vista™ by Viewpoint, and Global Software Inc.’s Spreadsheet Server. McCoig Senior Accountant, Nancy Skaggs took some time to explain how her organization has achieved great success by integrating these two important software systems.

Quick results

McCoig had deployed Oracle as their company’s accounting software suite prior to switching to Viewpoint in 2012. With Oracle supplying the data, they quickly discovered that writing a useful report was nearly impossible. That’s when the decision was made to add Global Software’s Spreadsheet Server to Oracle Financials for creating financial reports. Over time however, Oracle continued to be cumbersome from a training and usability standpoint so the decision to go with Viewpoint was made. “When we left Oracle to move to Viewpoint, Spreadsheet Server’s adaptable capabilities were employed so we could continue to reap the value that Spreadsheet Server offers,” Skaggs explained. “By combining Vista with Spreadsheet Server we were able to gain some significant benefits. Spreadsheet Server provides us with a reporting tool that leverages all the functionality of Excel, enabling us to ease the process of complex reporting, make changes on the fly, create ‘what if’ scenarios and get granular in the details we need to report on.” She summarized, “We’re pleased because Spreadsheet Server pulls the data from Vista seamlessly creating accurate and insightful reports for our managers.”

Efficiencies gained

Having Vista and Spreadsheet Servers Dynamic Spreadsheet Methodology (DSM) working together as the components of the McCoig technology platform has also brought some new efficiencies to the organization that didn’t exist before. “For starters, learning to write a report with Spreadsheet Server only takes minutes and hours as opposed to the days and weeks it used to take,” Skaggs said. “It’s an Excel add-in product which makes training new users a lot easier.” When it comes to getting reports out to the respective managers, even more
time savings has been found. Skaggs declared, “We can get comprehensive reports featuring data from Vista to the plant managers in about 15 minutes. Before this, the process would take significantly longer.” Regarding the ease-of-use for time savings, Skaggs described the versatility of Spreadsheet Server and how it integrates with Vista. “We use the functionality of Spreadsheet Server to reconcile our accounts as well. The drill downs and ability to expand to new users as we grow make it so easy. We’re constantly modifying our reports and the two software products work so well together – making our job that much simpler.”

A recommended technology pairing

When asked about her overall experience using the combined software products and her experience with customer support from both organizations, Skaggs had some encouraging words for anyone considering this technology combination. “I would tell any Viewpoint user to add Global Software Inc.’s Spreadsheet Server to their technology platform. Spreadsheet Server is so intuitive – we save ourselves tons of time and that’s important to our small accounting department.” Regarding customer support, Skaggs added, “Both Global Software, Inc. and Viewpoint have been great to work with. Their customer support is excellent and whenever there’s an issue, both support teams work hard to solve it.” She concluded, “Viewpoint has been great about adjusting things to the way we work and Global Software, Inc. always responds to any issue quickly. This combination has been great for us.”

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