

# SPREADSHEET AUTOMATION SOLUTIONS

## Gate Petroleum Company Case Study

**“Gate Petroleum has reduced their workload and simplified their reporting process by utilizing Global Software, Inc.’s Spreadsheet Server application.”**



### USER QUICK FACTS

**Customer since:** 2004

**Users:** 50

**ERP System:** Infinium®

**Products:**

- Spreadsheet Server
- Budget Manager
- Distribution Manager

***“My team realized that Spreadsheet Server was indispensable within a day of installation. Global Software, Inc.’s reliable customer support operation reaches up to senior leadership, ensuring that our needs are heard and responded to quickly.”***

**Barbara Peck  
VP, Information  
Systems  
Gate Petroleum  
Company**

### **Introduction**

Founded in 1960, Gate Petroleum Company began as a single service station in Florida and later diversified into construction materials, manufacturing plants, clubs and resorts, real estate, land development, and various other enterprises. Gate operates eight precast concrete plants, four private clubs and several real estate holdings throughout the Southeast. In addition, the company operates 225 state-of-the-art service stations which is still their core business. Gate has consistently been able to outperform larger, stronger companies with its sophistication and automation.

### **Situation & Strategy**

Prior to the deployment of Spreadsheet Server, Gate was wrestling with its current financial management and a complicated monthly report process. After learning about Global Software, Inc.’s tools, Gate executives arranged a demonstration to better understand their features and functionality. Shortly after Gate completed a trial of Spreadsheet Server for use with Infinium, the team was immediately impressed by its outstanding capabilities. In May 2004, Gate integrated Spreadsheet Server into their financial operation. Managing the general ledger became easier almost instantly. Barbara Peck, Vice President of Information Systems, stated, “Spreadsheet Server is a valuable tool for Gate Petroleum Company. It has completely changed the way we utilize and manage our general ledger; our workload is reduced; and the complicated process of maintaining accuracy in our numbers has been simplified. The turnaround time in our financial reporting has been incredible. What once took days to complete, can now be done in a matter of minutes. Resources, including time, paper and other materials are minimized.”

### **Results**

Gate’s implementation of Spreadsheet Server produced impressive results. The time expended to produce monthly reports was reduced from 1.5 days to less than thirty minutes. Due to Spreadsheet Server’s dynamic nature, balances can be refreshed within seconds. Previously, executing simple functions was extremely cumbersome. For example, report distribution used to be a multi-step process. It was never a simple task to distribute financial reports to the right people at the right time. Now, because of Spreadsheet Server, the company has streamlined their report distribution process with the click of a mouse, saving significant amounts of time and money. According to Barbara Peck, her staff’s favorite feature of Spreadsheet Server is its ease-of-use and its drill-down capabilities. The simplicity permits employees to stay focused and produce high quality results. Barbara adds, “We can not imagine our operation without Spreadsheet Server.”

## Spreadsheet Automation Tools Utilized by Gate



Spreadsheet Server is a Microsoft® Excel add-in that allows users to access 'live' data within Excel, while maintaining the ability to drill down to supporting details. Leverage the familiarity of Microsoft Excel as a reporting and analysis tool while providing up-to-the-minute dynamic data. Users of Spreadsheet Server can simply open a spreadsheet and watch the balances of their spreadsheet populate with dynamic financial balances. The unique drill down capability takes the tool to a new level of detail by allowing individual transactions to be monitored.



Budget Manager transforms your budgeting process into a dynamic, flexible, and responsive system. Leveraging the popularity of Excel as a budget- building tool, Budget Manager extracts budget data from spreadsheets into a central database. The time your business will save accumulating static budget detail will translate quickly into time spent on analysis and strategic planning. Additionally, all Budget Manager formats and layouts are completely user-defined, resulting in a streamlined interface for your managers.



Distribution Manager for use with Excel automates the delivery of key business information to your critical users. Eliminate unnecessary printing, copying and e-mail attachments. Empower your users with a tool that delivers this business-critical information in an easy and efficient manner. Benefits include automated, full delivery of reports and files through e-mail, printing, and archiving, unlimited file attachments of all types, ability to define key variables available to all spreadsheets, ability to provide custom parameters to spreadsheets prior to re-calculating, and much more ...

*Global Software, Inc. supports more than 4,000 customers in 40 countries across a variety of ERP platforms. Global is a proud supporter of the Infinium® user community.*

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