

# CASE STUDY:

## Microsoft Excel Automation Gate Petroleum Company



As a non-profit 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, and 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.

**1 COMPANY SNAPSHOT**  
Customer Since : 2004  
Users : 49  
ERP System : Infinium & JD Edwards

"Our operations use Spreadsheet Server to a great extent. It's convenient and being able to report on live data allows store managers, resort managers to see what they need based on input data... We feel like Spreadsheet Server is just an approachable and user-friendly business tool that everyone, without IT knowledge can use."

Charles Wilson  
VP, Information Systems  
Gate Petroleum Co.

**2 SITUATION & STRATEGY**  
Prior to the deployment of Spreadsheet Server, Gate was wrestling with its current financial management and a complicated monthly reporting process. In 2004, Gate integrated Spreadsheet Server into their financial operations. In 2015, Gate added JD Edwards as component to their data storage. Managing the general ledger became instantaneously simplified. Spreadsheet Server allows Gate to generate reports and directly extract the information they need faster and at less cost than previously.

**3 RESULTS**  
Time Expended to Produce Monthly Reports

1.5 DAYS → <30 min

### WHAT GATE HAS TO SAY

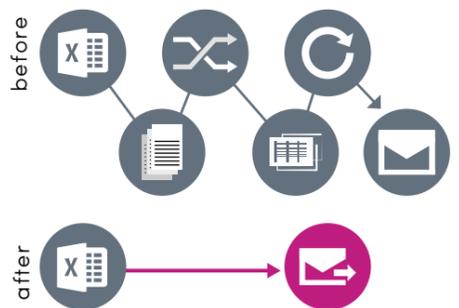
**4**

**Spreadsheet Server** converts Excel into a tightly integrated analytical tool for any ERP system. Users can leverage the strength of their spreadsheets with seamless dynamic integration to their information, along with powerful drill-down capability to the lowest level of detail. It allows users to build a range of reports from simple ad hoc workbooks to complex dashboard-type views of critical business data.

**Budget Accelerator** allows your organization to streamline and control your budgeting process, ensuring timeliness, accuracy, and consistency of your budgets. Leveraging the popularity of the Microsoft® Excel spreadsheet as a budget building tool, Enterprise Budgeting requires less time accumulating your budget detail meaning more time for analysis and strategic planning.

**Distribution Manager** automates the distribution of reports from Excel.

**5 RESULTS**  
Report Distribution Efficiency:  
from multi-step process to one click



Less reliance on internal IT, unlimited access to Global Software support

**6 RESULTS**

**7 PLATFORMS FOR SUCCESS**

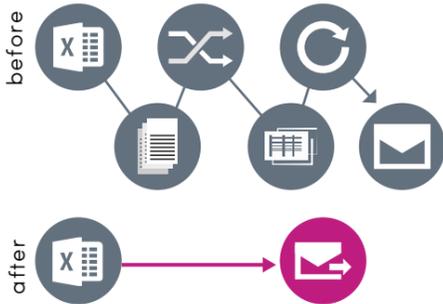
**8 IN A NUTSHELL**  
Encouraged by being able to work in Excel without IT assistance, people started generating their own reports with a newfound creativity. By maximizing the user field in Infinium, Gate extended reporting down to the supervisor level which resulted in fast and accurate, daily business decisions.

# 2016 Case Study: General Elements

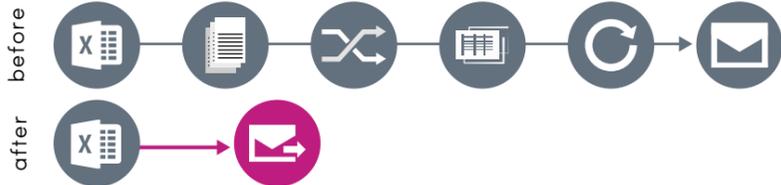
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**RESULTS**

Report Distribution Efficiency:  
from multi-step process to one click



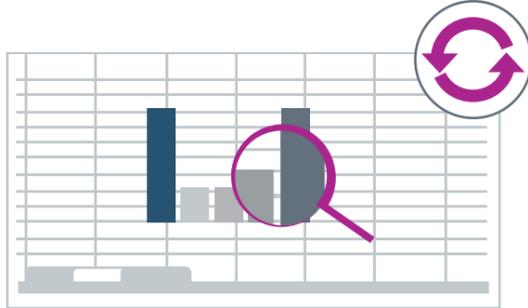
or  
(depending on layout)



X

**RESULTS**

Increased accuracy and flexibility for  
on-the-fly reporting



X

**RESULTS**

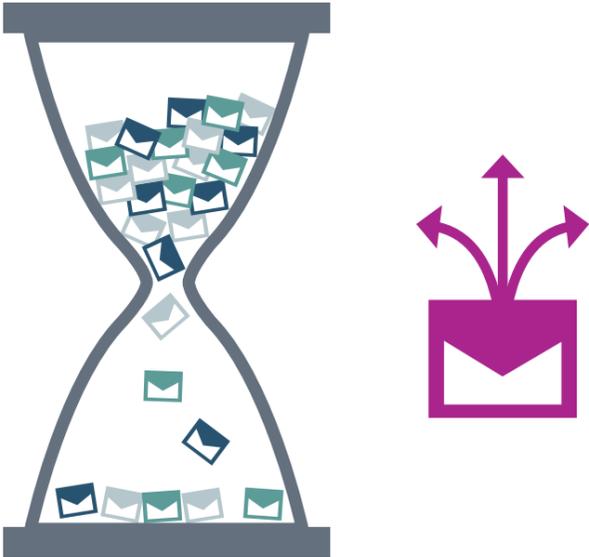
Data Security



X

**RESULTS**

From manual, time-consuming report generation  
and to automated reporting and distribution



X

**RESULTS**

Less reliance on internal IT, unlimited  
access to Global Software support



X

**RESULTS**

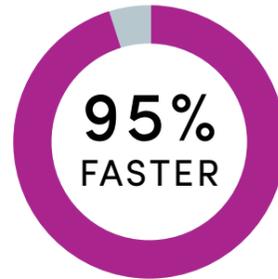
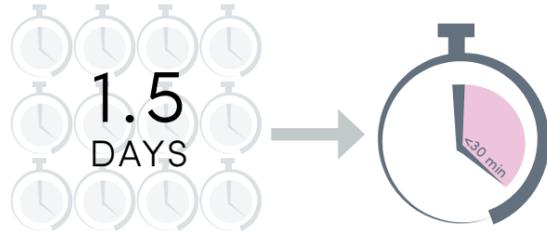
Fast Implementation and Training  
for intuitive, user-friendly products



# 2016 Case Study: Data Elements

## X RESULTS

Time Expended to Produce Monthly Reports



## X RESULTS

Cost Analysis



or  
(depending on data)



"Our operations use Spreadsheet Server to a great extent. It's **convenient** and being able to report on **live data** allows store managers, resort managers to see what they need based on input data... We feel like Spreadsheet Server is just an **approachable** and **user-friendly** business tool that everyone, without IT knowledge can use."

First, Last  
Title at company  
Company Name

## WHAT ... HAS TO SAY



Converts Excel into a tightly integrated analytical tool for any ERP system. Users can leverage the strength of their spreadsheets with seamless dynamic integration to their information, along with powerful drill-down capability to the lowest level of detail. It allows users to build a range of reports from simple ad hoc workbooks to complex dashboard-type views of critical business data.

spreadsheet server

Automates the distribution of reports from Excel.

distribution manager

Allows your organization to streamline and control your budgeting process, ensuring timeliness, accuracy, and consistency of your budgets. Leveraging the popularity of the Microsoft® Excel spreadsheet as a budget building tool, Enterprise Budgeting requires less time accumulating your budget detail meaning more time for analysis and strategic planning.

budget accelerator

or  
(depending on space)



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**Distribution Manager** automates the distribution of reports from Excel.

## X PRODUCTS TO SUCCESS