



Introduction

This case study of LegalShield® is based on a September 2016 survey of Global Software, Inc. customers by TechValidate, a 3rd-party research service.

LegalShield saved over 300 hours in one year
with Spreadsheet Server.

300h

Challenges

The business challenges that led the profiled company to evaluate and ultimately select Global Software, Inc.'s Spreadsheet Server:

- Rekeying data from the ERP system into spreadsheets
- Manual, multi-step reporting processes
- Creating reports in a timely manner
- Lack of ability to quickly analyze account activity

Use Case

- Evaluated the following reporting tools before choosing Spreadsheet Server:
 - None.... fell in love with this product as soon as I saw it.
- Selected Spreadsheet Server over the competition because of the following
 - Capability to drill down to sub-ledger details
 - Excel-based interface

Company Profile

Company:
LegalShield
Company Size:
Medium Enterprise
Industry:
Insurance
ERP Platform:
JD Edwards



- Pricing
- Quick implementation time
- Uses Spreadsheet Server for Financial / General Ledger reporting and the following module:
 - Fixed Asset Subledger

Results

- Benefits received from Spreadsheet Server:
 - Removal of disparate static Excel sheets
 - Faster, streamlined report creation
 - Improved data accuracy
 - Faster access to live data to make strategic decisions
 - Empowers users to create their own reports with less dependency on IT
 - Greater visibility into the overall business strategy
- Reporting processes streamlined with Spreadsheet Server:
 - Data extraction from an ERP or relational database
 - Automated distribution of reports to management & other departments
 - Month-end close and management/board reporting packages
 - Auditing and tax schedules
 - Budgeting/forecasting processes
- Actions or business insights gained using Spreadsheet Server:
 - Centralized reporting practices
 - Validated data
 - Increased ability to complete tactical and complex analysis
- Saved over 300 hours in one year with Spreadsheet Server.

Source: Twila Shelton, Controller, LegalShield

About Global Software, Inc.

Global Software, Inc. is the leading provider of Microsoft Excel-based automation & reporting solutions to enhance the world's foremost Business Intelligence (BI), Enterprise Resource Planning (ERP) including: SAP®, Oracle®, JD Edwards, Microsoft®, Infor®, Viewpoint® and other operational platforms. Global's tools enable spreadsheet users to gain live access to ERP data within Excel for secure financial and operational reporting, budgeting, and automated report delivery.

“With the ability to do more in less time, we can now accomplish more with fewer resources. Spreadsheet Server also allows us to perform reporting that we could not do in a timely manner before the software installation.”