

SPREADSHEET SERVER CASE STUDY

BSK Associates

BSK Associates saved hours reporting out of their Deltek Vision ERP by automating reports, combining data from multiple sources, and reducing IT dependency

California-based BSK Associates has been in business for over 54 years, providing consulting engineering and analytical testing for its customers, operating out of seven locations across the West Coast.

The Challenge

BSK Associates is split into two divisions, each using a separate ERP system. One division uses Deltek Vision SaaS (on the cloud) and the other an on-premise ERP based on an on-premise, Microsoft SQL Server database.

BSK was using a mix of Crystal Reports and Microsoft SQL Server Reporting Services (SSRS) to provide information to stakeholders. However, BSK found SSRS to be a complex, technical reporting product that required the use of external consultants every time a new report was required. Since this was an additional cost and

had to be scheduled, it meant stakeholders were waiting for a long time before being able to conduct their analysis. Within the business, there was also a lack of trust in the data produced by Crystal Reports and SSRS, because it was not clear that data was being pulled from the right tables. Because BSK had to merge the two ERPs, and Accounting needed to see the numbers, Accounting found themselves consistently using their preferred tool of Microsoft Excel to manually merge and review BSK financial data.



“Accounting knows what they want, and doesn't have the time to explain every report to IT.”

Around two years ago, BSK moved to Deltek Vision on the cloud, which meant the Accounting team at BSK had to evaluate alternative means of generating reports. Since IT was now in charge of report generation, this meant that the CIO, Kris Morton, and his employees in IT were having to put a lot of time into helping the Accounting department generate reports. Morton recalls



CASE STUDY

CLIENT



BSK Associates: Engineering Consultancy

PRODUCT



Spreadsheet Server

BSK Associates



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“some of the IT staff didn’t have the deep financial knowledge that would be required for these reports, so there ended up being a lot of guessing.” This guessing could led to errors in the reports, and with every error that occurred, more time would have to be spent by both departments fixing the issue and re-running reports.

Server could connect to multiple data sources was an immediate win for BSK, and was what ultimately made Morton think “this is the solution we need.”

The move over to Spreadsheet Server saw immediate benefits for BSK, with Morton noting that the product had “taken a lot of work away from IT staff,” and it was “nice to watch Accounting take over.” The ability to switch over this responsibility saved both Accounting and IT departments so much time because “Accounting knows what they want, and doesn’t have to explain every report to IT.”

“Our stakeholders now have full confidence in the data they are using, as they now have one source of truth.”

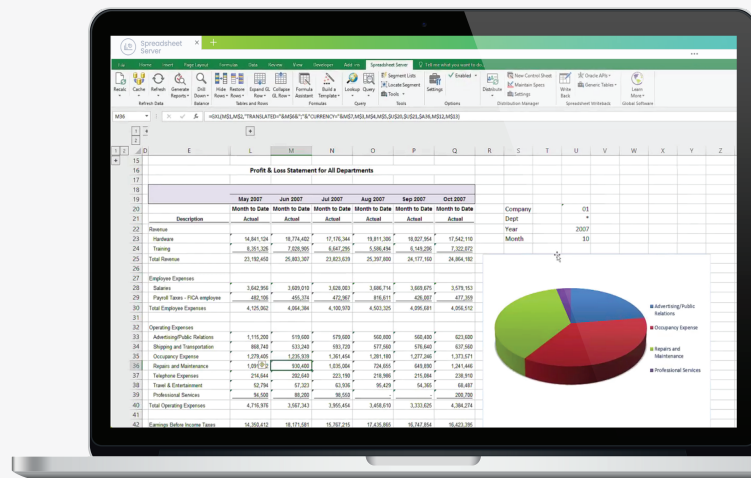
Prior to using Spreadsheet Server, it would take Accountants hours each month to generate reports, which often involved manually rekeying data. This was especially true when combining data from both Deltek Vision and their SQL Server-based ERP into one report, for which they ended up manually dumping the data into Excel. These manual data dumps increased the potential for error, and also took significant time away from the actual analysis of the reports they were attempting to generate.

“Spreadsheet Server solved some of our biggest data challenges by simplifying the reporting process and bringing everything together in one place,” added Morton. “Our stakeholders now have full confidence in the data they are using, as they now have one source of truth.”

BSK began using Spreadsheet Server during the COVID-19 pandemic, insightsoftware was able to provide “top notch” virtual training, answering any

Building Success with Spreadsheet Server

Spreadsheet Server has the advantage of being based on the Accountant’s tool of choice: Excel. This meant that the team at BSK had a short learning curve after implementing the product. No one had to learn how to code, and with Excel being “native” to most Accountants, it was easy for IT to hand over responsibility to them. The fact that Spreadsheet



questions that arose during the adoption process. Morton mentions that, without this training “we wouldn’t be where we were as a company.”

In addition to this, Spreadsheet Server allowed BSK Accountants to shave time off their report generation almost immediately. Report automation meant that they didn’t have to spend hours creating reports, and the platform allowed them to “borrow” from other reports, rather than having to recreate them.

For example:

- One report that used to be keyed manually for 5 cost centers, which took 20 minutes to recreate in Spreadsheet Server, can now be refreshed instantly with the latest data available, at any time
- Their Laboratory Supplies Report had to be produced weekly and was also keyed manually as it pulled data from both ERP systems. This report is now automated and requires no intervention from end-users

BSK has seen substantial time savings and increased trust in data as a result of implementing Spreadsheet Server. Some reasons for this are:



Reports that **once took hours** to generate at the end of each period are **now completely automated**



“Cut out the middle man” - Handing responsibility over to power users has reduced the time spent by IT generating reports



Staff now have access to **live data across multiple data sources**, and can be assured that their reports are **up to date** with accurate figures



Everyone was already copying data into Excel, but it was static data; Spreadsheet Server provides access to live data in Excel, which **eliminates data dumping** and manual manipulation, and means **fewer errors** as a result

Navigating Success

“All the math Accounting would usually do is automatically done for them without ever having to leave Excel. Live data can be refreshed if they want to see what’s happening today.”

-Kris Morton, CIO, BSK Associates.

To learn more about Spreadsheet Server visit [insightsoftware.com](https://www.insightsoftware.com)