

CASE STUDY

SATTERFIELD & PONTIKES CONSTRUCTION

HOW S&P INTEGRATED ITS FIELD PROCESSES
WITH ITS BACK-OFFICE ERP



VIEWPOINT
A TRIMBLE COMPANY

S&P

SATTERFIELD & PONTIKES
CONSTRUCTION, INC.

HOW S & P INTEGRATED ITS FIELD PROCESSES WITH ITS BACK-OFFICE ERP

Satterfield & Pontikes (S&P) is a Texas based general contractor that provides a range of preconstruction, construction and consulting services to public and private clients. S&P is proficient in a number of delivery methods, including general contracting, construction management and design-build, and utilizes advanced technologies to maximize value for clients.

BEFORE:

- Paper based practices drained efficiency from thorough and well-reinforced safety processes
- Double handling and manual rekeying of safety data into non-integrated ERP and project management software
- Decreased data accuracy from missing information fields and “fat finger” entries
- Inefficient email based notification and communication
- Data latency in reporting impacted ability to spot trends and analyze compliance

AFTER:

- Elimination of double work and manual entry
- More accurate and consistent digital form data that’s integrated with the ERP
- Fast flowing field data for richer reporting
- Quickly identify and address issues
- Reduced operational costs and project risks
- Increased transparency and collaboration



CHALLENGE

Jobsite safety is core to S&P culture. A dedicated team of highly-trained safety professionals leads S&P's safety program by establishing best practices and constantly reinforcing safe practice and a safety culture. This team regularly visits jobsites to audit practices, preempt hazards and ensure regulatory compliance. The team is augmented by the onsite project team who document safety observations in real-time.

Although S&P safety processes are thorough and well reinforced, they lacked efficiency. Paper-based forms for both safety audits and safety observations created tremendous redundancy by requiring write-ups in the field, manually keyed-in documentation into the ERP and in the case of safety observations, manually entering data again into Procore® (which is not integrated with its back-office ERP, Vista). Missing information fields and "fat finger" entries decreased data accuracy while inefficient email traffic to notify managers that submissions were made, further drained efficiency.

In this process, forms were compiled and manually entered in batches at week's end. As a result, risks increased when reporting from the ERP because it did not contain the most up-to-date information, which is used to spot trends, analyze compliance, flag where root cause analysis is needed and report on incidents. Data trapped on a paper form or sitting on someone's desk or simply in a vehicle while being delivered is wasted and the full value cannot be realized.

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Integration reduced the number of applications in use and resulted in efficiency improvements by eliminating double work and manual entry.

—Kym Livingston, Corporate Trainer



SOLUTION

S&P evaluated many field solutions over the years but could not find the right fit. S&P knew integration could bring significant benefit and having been a Viewpoint Vista ERP customer for over a decade, it was decided to try an integration between Viewpoint Field View's browser and offline capable iOS and Android mobile solution.

Using Vista's user data, which enables custom database table creation, the solution was selected to eliminate paper, data silos and the double work that was required to manually enter paper form data into both Vista and Procore.

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Captured data flows quickly from mobile devices in the field to the ERP, and is more accurate and consistent.

— Joe Hacking, Database Manger





RESULTS

Viewpoint Field View's custom form designer enabled S&P to create digital forms that replicate the more familiar paper versions. "Integration reduced the number of applications in use and resulted in efficiency improvements by eliminating double work and manual entry," said Kym Livingston, corporate trainer for S&P.

Digital forms enforce mandatory fields, pre-populate data like default dates and allow users to select pick-list values such as employee or phase from table data that's synced to the mobile device, from Vista.

"Captured data flows quickly from mobile devices in the field to the ERP and is more accurate and consistent," said S&P Database Manager Joe Hacking.

Excuses for not submitting forms are virtually eliminated when every person on site has a tablet or phone in their pocket. Risk is reduced and reporting is richer when data flows daily into Vista, instead of days or weeks later, as was the case with paper. Additionally, back office ERP users can analyze reports containing field data in Vista, instead of having to login to a separate application.

Near real-time data allows safety and project management leaders like S&P's safety director to quickly identify and address issues such as unsafe work practices by a subcontractor. Browser dashboards increase visibility for the office and trailer, as they can quickly see what has not been submitted at a glance then create tasks, follow up and track to close.

While currently just being used for more timely safety reporting and analysis, S&P has begun using Field View for meetings, quality control and project progress photos. Already, S&P has seen the benefit of digitizing paper forms and integrating mobile devices with the back office ERP. The robust data and associated analytics are helping drive down costs and reduce risks. And this increasing transparency, collaboration and efficiency continues to drive more value for clients.



ABOUT VIEWPOINT

Viewpoint, a Trimble Company, is a leading global provider of integrated software solutions for the construction industry. Viewpoint software enables customers to integrate operations across the office, team and field to improve project profitability, enhance productivity, manage risk and effectively collaborate across the broad construction ecosystem. With nearly 8,000 clients, including more than 40 percent of the ENR 400, Viewpoint's innovations are transforming the construction industry by fully integrating operations across financial and HR systems, project management tools and mobile field solutions.



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