

Increasing Data Accuracy & Integrity for a Multibillion Dollar Company

The Challenge

Ranked among the top construction services providers in the country by *Engineering News Record* (ENR), The Yates Companies, Inc. (Yates) is family owned and provides a wide range of construction and building services. Founded in 1964 by William G. Yates Jr., they have steadily grown to become one of the top construction providers in the nation for both commercial construction and industrial building.

With annual revenues consistently exceeding \$2 billion and nearly 6,000 employees, Yates helps clients achieve their vision by carefully managing the details and complexities of each project and communicating constantly with all team members.

Given the scope and scale of their projects, having disparate technologies, and siloed data presented challenges in being able to provide timely and accurate information to both their finance and project teams. As an ENR Top 30 Company running many projects – and often very complex ones – the optimizing of processes provides both financial and operational benefits. This is especially true with connecting processes that enable field-level information to flow seamlessly to and from the finance system.

Why Morpheus?

Yates is a longtime Viewpoint Vista client and with the adoption of Trimble's ProjectSight (project management) application they now had an end-to-end solution. That is, from the field to accounting. But they lacked an automated way to connect critical data from ProjectSight to Vista.

As is the case for many construction companies, one of the most challenging workflows for Yates is the change management process. Managing change orders and potential change orders in a disconnected environment would have meant project teams entering data in both the project management system (ProjectSight) and in the accounting system (Vista).

For example, to issue a subcontract, Yates wanted to avoid the project managers having to enter the data in ProjectSight and then turn around and do it again in Vista. Similarly, they wanted to have vendors in Vista to automatically be set-up in ProjectSight, so project managers manage projects, not accounting systems and vice versa.

The Solution

The Morpheus integration solution is centered on workflows and business processes. There is no need for coding or custom development – just configuration. For example, having the ability to replicate Yates's change management process within the Morpheus process engine as opposed to "building" a solution.

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We gain better cost control and financial accountability company-wide”

- **David Olivet**, Manager of Software Development

Yates's well documented and defined processes made the discussions quick and efficient to configure the solution. Yates also took the opportunity to refine and streamline their procedures while working out the connections. The financial, operations and IT teams partnered with Morpheus and Trimble to ensure a solution that reflected the way they ran their business. This gave them total control over the way data flowed between ProjectSight and Vista.

As can be expected for a large company, most of their workflows were complex, involved multiple operating units and had to take into account both the revenue side of the business (owner contracts) along with the cost side of the business (commitments). This also included the changes related to owner contracts and commitments (e.g., contracts, PCOs)

With the Morpheus solution, Yates could leverage those familiar and time-tested workflows via the integration for a seamless experience. Additionally, they could easily alter and create new automated workflows as needed with no limitations or constraints on the number they could create. This flexibility and deep level of configurability is crucial to companies like Yates with many multifaceted projects. It works for small projects, mega projects, hard bid, CM at risk, Design Build, Program Management, IPD, and even self-perform projects.

"With the Morpheus platform, I have the ability to easily integrate other applications."

- David Olivet, Manager of Software Development

The Benefits

Accountability. That's one of the key benefits with an integration and in the case of Yates, one of the most important. The accounting system is the source of truth and with an integrated environment you can easily know where those numbers came from since applications are tied together.

According to Benjamin Crosby, Yates's Director of BIM/VDC, "Using ProjectSight modules to track the potential changes, then process them as needed, made it two levels easier for our PM teams to manage their projects. Then Morpheus allowed the tracking and accounting to tie directly together, so it is now easier to do better work. This is one of those elegantly simple things that helps us bring real value to our clients."

Because the data is moving seamlessly and automatically, there's no longer the issue of error-prone manual data entry. Additionally, duplicate data entry – keying in information two or three times – is a thing of the past.

Finally, keeping resources in their "lanes" is critical. The operations team no longer needs to access the accounting system and vice versa.

But it's not only the finance and project teams that see the value in a configured solution. David Olivet, who led the integration initiative, is Yates's Manager of Software Development and he "...loves having an engine that I know is just going to process this stuff and it works."

IT groups have complete control over the solution so they can review the configuration settings and tweak a few queries to make any changes to the workflows or add new ones. No custom coding is required. This ease of configurability frees David and his team up to do other higher- value projects.

WHY MORPHEUS?



**FULLY
AUTOMATED**



**COMPLETE
CONTROL**



**ENDLESSLY
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