In this issue

Page 2/3
- Live on COINS OA - R.H. White
- Hooper looks to the future with COINS

Page 4/5
- Cloud lets you focus on core business - not IT
- mGRN: Paper-free app improves receipt-invoice matching
- Crew daily report eases foreman’s job

Page 6/7
- COINS works with Autodesk on its cloud pilot program
- Integrated CRM, greater accuracy

Page 8/9
- Progress PR campaign features COINS
- Where we’re at...
- How To... Use Column Sets in COINS OA

Page 10/11
- Construction Executive interview: Derek Leaver
- Q & A with... Brian Drumm, Delivery and Product Director

Page 12
- COINS Supports CFMA Amazing Chase Las Vegas
- COINS supports inclusive child development center
Congratulations to the R.H. White Companies on their successful implementation of COINS OA. Comprised of four operating companies R.H. White has grown successfully over its 100 years of construction operations. When they embarked on selecting software for an improved ERP with additional functionality and modern technology, it resulted in the selection of COINS OA.

Modules implemented included Client Relationship Management (CRM), Financials, Job Cost, Service Management, Equipment Management, and Human Resources. Document Management and Workflow are also in place. Ninety concurrent users and 140 mobile field users access COINS each day.

"The installation has involved an extremely complex system being implemented over four distinct and differing companies. Making this happen has been a major accomplishment, in my view. The COINS team is very responsive and works hard. We are always confident that if there is an issue, COINS will respond in a timely manner. The integration between COINS and R.H. White has been very good, and the relationship developed is one I’m very comfortable with," states Jim McCarthy, COO R.H. White Companies.

Part of the implementation included development of new features in COINS OA designed for contractors doing unit price work with crews in the field. Having a streamlined and efficient way to establish crews and charge time for labor, equipment, quantities installed, and inventory was the key business driver for this project.

"We were looking for a strategic partner, one that we could work with for years to come, so we didn’t take our choice lightly. We also wanted a company whose software was not only capable of catering for our needs now, but that was scalable for our future growth," said Jim McCarthy, COO R.H. White Companies.

Located in Auburn, MA, R.H. White Companies specializes in the energy, water & wastewater, industrial, corporate, and institutional markets. Employing over 500 people, it is the largest natural gas contractor in the Northeastern United States.
Full service electrical power and mechanical contractor Hooper Corporation (www.hoopercorp.com) celebrated its centennial in 2013 looking at the past and planning for the future.

Hooper, headquartered in Madison, Wisconsin, has extensive experience in completing large and complex projects throughout the continental USA and Canada. A privately held company, it has grown from a small heating/piping company to today’s diversified mechanical and electric power contractor under the leadership of several generations of hands-on professional owner-operators.

With 100 years of success behind it, Hooper is planning ahead for continued growth and expansion over the next hundred. With its ambitious goals, Hooper needed to ensure that the right systems are in place to support this growth. In early 2014, with due diligence and after performing a complete ERP software evaluation, Hooper selected COINS.

Michael Blaschka, Hooper’s Director of Information Technology, commented, “We conducted an extensive search and looked diligently at a variety of options. We decided that COINS offered the most comprehensive solution for our needs, combining both construction and service. The COINS Open Architecture (OA) platform with its modern web browser interface and mobile capabilities offer the flexibility to get information into the field and to the most appropriate device.”

Over the next 12 months, Hooper will implement COINS OA including modules for Financials, Job Costing, Service Management, Schedule & Dispatch, Mobile Technician, Customer Relationship Management (CRM), Payroll, Human Resources, Purchasing Cards (Pcards) and Tableau for business intelligence.

The multi-currency and multi-lingual capabilities that Hooper required are standard features of COINS and as a self-perform business, support for certified payroll across multiple states, localities, and unions was essential.

“COINS has a proven track record and extensive experience working in the construction and service sector. This gives us great confidence in the COINS team and their ability to deliver a successful solution.” concluded Michael. “We know COINS cares about our outcomes and as an organization their culture and values are aligned with ours which is an ideal foundation for a long term business partnership.”
Cloud computing has already impacted the business use of IT and is positioned to change the face of the world economy.

Cloud computing can be defined as a set of hardware, networks, storage, services, and interfaces that combine to deliver aspects of computing as a service. It provides the means through which everything - from computing power to IT infrastructure, from applications and business processes to personal collaboration - can be delivered as a service wherever and whenever needed.

Organizations are attracted to cloud computing by the desire for a secure, resilient and scalable IT infrastructure that lets them focus on running their core business, with predictable IT costs and minimal capital expense and without having to worry about the underlying architecture. Statistics show that up to 80% of IT budgets are tied up in routine maintenance - cloud frees up IT executives to think and act strategically.

COINSCloud

COINSCloud is an enterprise-class cloud computing platform that offers a wide range of solutions to companies which are ready to explore the advantages of cloud computing such as pricing, resilience, scalability, security, accessibility and more.

Through COINS’ established AllianceOne partnership with Hewlett-Packard and strategic affiliations with Equinix and VMware, the COINSCloud platform incorporates all aspects of the infrastructure, resilience, scalability, agility and on-going IT management and administration required to support business-critical IT systems.

COINSCloud offers a wide range of solutions ranging from the familiar COINS OA applications, to COINSCloud DR-on-Demand, to client-specific private cloud/IT platform solutions designed to deliver all of a client’s strategic business needs. As a Microsoft partner, COINS can provide a range of Microsoft solutions as part of a broad solution portfolio that offers greater collaboration and integration for COINS clients.

5-Step approach to cloud adoption

A structured migration approach can help meet the high expectations regarding cloud computing’s ability to deliver business value while reducing operating costs. COINS takes a 5-step approach to cloud adoption, based on understanding the client’s requirements, selecting the right cloud services, and clearly mapping out the migration. These five steps can help clients capitalize on the best of what cloud computing has to offer while minimizing risks.

Step 1: Strategic Review – gain a comprehensive understanding of the client’s business goals and objectives and how its IT strategy is aligned with those goals.

Step 2: Evaluate Current State – analyze current processes and evaluate the existing IT architecture, flexibility, resilience and capacity to meet anticipated demand.

Step 3: Cloud Readiness Assessment – gain an understanding of what and how to migrate and the value associated with such changes to derive clearly defined objectives for the cloud strategy.

Step 4: Define Roadmap – outline the incremental steps to deploy or migrate target applications to a cloud-based service.

Step 5: Communicate – define the communication plan, content and distribution to ensure successful adoption of the changes across the organization.

If you use or are considering COINS OA and would like to find out more about COINSCloud and how to gain competitive advantage by adopting cloud technologies, please visit www.coins-global.com/cloud or contact your account manager.
mGRN: Paper-free app improves receipt-invoice matching

Achieving a full three-way match between invoice, PO and goods received is a challenge when using paper-based documents that can be misplaced or lost. mGRN, a new mobile app from COINS, enables site-based personnel to record goods received in near real time and link the information directly to the office procurement system.

When finished, mGRN generates an electronic GRN; the data stored on the mobile device is sent back to COINS and recorded against PO line items as soon as a mobile signal is established.

Better quality data and service delivery insight
Implementing mGRN helps improve the efficiency of the invoice matching process and also helps reduce administration costs. No more typos, wrong allocations, handling exceptions, or paying suppliers based on trust. Since receipts are logged against specific POs, actual costs are attributed to jobs automatically.

The GRN information from the field links directly into the office procurement system. The app’s automated process ensures the integrity of the data in the office procurement system and eliminates rekeying from paper documents.

Better supplier and client relationships
The better quality of data enabled by mGRN helps minimize the amount of time spent chasing deliveries, resolving queries, and settling disputes. Problems can be resolved quickly with evidence at hand; signatures, date-stamped photos and even GPS coordinates of where the delivery was received.

Access to electronic copies of GRNs is often an audit requirement and can make a difference in the bid and contractor selection process. By using mGRN technology to streamline the procurement process, COINS clients can demonstrate innovation and service quality to both their suppliers and customers.

Crew daily report eases foreman’s job

It can be difficult to get current day information from the job site for labor and equipment hours, inventory, quantities installed or other charges. The information may be tracked daily, but getting it into the back office system for processing and reporting can be impacted by delays in receiving the reports, poor handwriting, inaccurate coding and redundant data entry.

What if the foreman could fill in the daily report online, instead of on paper, and automatically update COINS? That is exactly the purpose of the COINS Crew Daily Report (a.k.a. the CDR or Daily Report), which is available as a web application within the COINS OA browser (listed under both Job Status and Project Management) and as a tablet-based mobile app.

Using the Daily Report, a foreman can easily record information by day for a job: labor hours, equipment hours, inventory transfers, quantities installed and miscellaneous charges. As much information as possible pre-populates the Daily Report and then costing elements, labor or equipment records can be added or updated as needed. In many cases, the user can copy the previous day’s report, which brings over the labor, equipment and costing elements of the job.

The completed Daily Report is submitted for review and approval, typically to the project manager, at the end of the day. Upon approval, the charges are created and approved labor hours can be pulled into the Payroll module.

R.H. White Companies partnered with COINS in the development of the Crew Daily Report and began using the new function when they went live on January 1, 2014. Since January, over 7000 daily reports have been processed in COINS OA. As a Unit Price contractor, the ability to efficiently capture installed quantities on a daily basis is crucial in providing timely and accurate billings to their customers and productivity reporting to their project managers.
The partnership between Autodesk and COINS continues, most recently seeing COINS work with Autodesk 360 and Autodesk BIM 360™ Glue to link design and BIM with COINS Open Architecture.

Building Information Modeling (BIM) is important for any construction firm, with its ability to digitally construct the building to resolve issues cheaply from the office before they turn into expensive on-site changes. BIM is being mandated on more and more projects - both for public contracts and by private contractors and owners, while companies that embrace BIM are seeing cost-savings. In addition, as BIM contains a wealth of additional information, the information can flow into the rest of the business, where COINS is in a prime position to help.

COINS has been working on linking documents on the Autodesk 360 cloud with the COINS Document Management system. This allows COINS users to view construction documents (including redlined DWG and DWF files) from within COINS in a browser, without any additional plugins or downloads.

In December, COINS was invited to showcase this functionality in Autodesk’s Cloud Pavilion at Autodesk University 2013 in Las Vegas, which is Autodesk’s big annual user event.

BIM markups and clashes within COINS Project Management
Autodesk BIM 360 Glue is an online BIM coordination and management service that provides anytime, anywhere access to connected project information.

Cloud-based BIM with Autodesk BIM 360 Glue simplifies coordination and clash detection between building disciplines, as well as providing a powerful cloud-based collaboration tool. The COINS/BIM 360 Glue project links views, markups, and clash detections created in Glue with issues in the COINS Project Management module. Rather than a static image, the live model can be seen in Glue through the COINS OA page, allowing navigation using a lightweight browser plugin.

In December, COINS was invited to showcase this functionality in Autodesk’s Cloud Pavilion at Autodesk University 2013 in Las Vegas, which is Autodesk’s big annual user event.

Updated COINS BIM Apps
COINS has released new versions of its successful Revit and AutoCAD apps on the Autodesk Exchange Apps store. These apps are some of the most popular and highly-rated on the site. This work showcases the types of tools that COINS can develop for you to improve your productivity and reduce overhead when working in your design software. Visit apps.exchange.autodesk.com to download or find out more.
Among construction companies, the strategy for handling customer interactions often revolves around a standalone customer relationship management system. It might be cloud based, it might be on-premise, but rarely is it fully integrated into the company’s ERP system or designed for construction business processes. These drawbacks are resolved with COINS Client Relationship Management (CRM).

As a fully integrated component of the COINS system, CRM can link up information about projects, companies, people, and outcomes with construction processes, so the company can stay up to date from lead through contract completion. With one central location, one shared database, there is no need to re-enter company information, contacts, or personnel. CRM helps eliminate the problem of chasing down information for past jobs and projects; costs, personnel and other data will always be available within COINS. Reports in CRM can link projects to current information in Job Status.

User-friendly workbenches and “My CRM” streamline tracking opportunities and outcomes, people, and companies throughout the often lengthy bid-to-win cycle.

RH White (www.rhwhite.com) is one of the newest users of COINS CRM. Lisa Russo, RH White’s Business Development Administrator, says: “COINS CRM covers the key marketing processes like recording companies and contacts, and tracking project opportunities. We are excited that our company will now be able to track a project from the opportunity status to final billed in one system. Previously we had many shadow systems running, which made it difficult to track a project.”

Development in partnership

COINS is keeping to its core principle of “working in partnership” while improving CRM’s functionality and ease of use. Input from CRM adopters like Southland Industries, RH White, and others are leading to continued improvement of the module.

For example, Projects Workbench enhancements in v11.01 are improving ease of use with one-page creation of new projects and a tab-free layout that uses standard and user-definable column sets instead of tabs. Projects can be linked to Job Status jobs. Also included are greater filtering capabilities, additional fields (dates, personnel), improved duplicate checking, and new parameters for setting dates for displaying amber or red alert color coding. Smaller changes are also improving usability: an “auto-fill” quick search functionality was added to lookups throughout the module.

Ryan Nagle, Senior ERP Business Analyst at Southland Industries (www.southlandind.com), says: “When making the decision whether to implement the COINS CRM module across our company or stay with our current independent CRM system, it was a no brainer. An integrated system linking our Sales and Job Cost Management functions was the obvious answer. This integration has not only streamlined our operations, but has also allowed us to focus our energy on defining what data we want to capture rather than focusing on the more mundane tasks that are required when integrating data from two separate sources. After a simple implementation process, COINS helped us configure the module based on what we need now as well as what we may want to use in the future. To further streamline our process, we implemented a workflow that eliminates our offline proposal approval process and allows us to capture even more data in the system. Essentially, we have created a single source for our company’s most sought after and highest valued information.”
Progress Software featured COINS in a recent press release and case study. As a global leader in enterprise software for the construction industry, COINS is using the data integration capabilities of the Progress® platform to share application data with third party BI tools.

The result is improved insight into construction projects (and potentially improved profitability) by rapidly and easily connecting raw information with the business intelligence tool of the client’s choice.

Tim Armitage, technical director at COINS, said, “Success in the construction business is dependent on mastering information. Ensuring complicated and varied construction projects are profitable as well as safe requires a company to have an absolutely crystal clear view of its data. With the Progress DataDirect® product, we enable our clients to use their choice of business intelligence tool to view, explore and analyze their financial and commercial data - allowing them to spot trends and patterns and maximize profitability.”

Mark Armstrong, vice president and managing director, EMEA at Progress, stated, “In the highly competitive construction industry, companies cannot afford to make a wrong decision. Measuring the right data at key points in the building process is the difference between success and failure.”

The case study, titled “COINS: Improving Customer Insight,” is available on the Progress website at http://www.progress.com/customers/coins

Success in the construction business is dependent on mastering information.

Look for COINS at these industry events in 2014:

**CFMA Annual Conference & Exhibition 2014**
June 7-11, 2014
Caesar’s Palace
Las Vegas, NV

**MSCA 2014 Educational Conference**
September 28 to October 1, 2014
Hyatt Regency Huntington Beach Resort & Spa
Huntington Beach, CA

**ENR FutureTech 2014**
December 10, 2014
Georgia Tech Conference Center
Atlanta, GA
How to: Use Column Sets in COINS OA

Column sets enable users to display different columns of data in many COINS OA browse screens. Column sets can be very useful for users who frequently need to browse lengthy lists and use multiple entries, such as finance and accounting personnel.

When column sets are available for a function, a Column Set selector appears at the top right of the screen so the user can choose which column set to display. COINS remembers which column set the user chose and the same columns will show the next time the user accesses that screen.

Starting with v11.01 of COINS, it is possible to set up frozen and scrolling columns. The person who defines the column set can choose how many columns are frozen (i.e., always remain on the screen) while the remaining columns scroll left and right.

Column sets are typically pre-defined by the system administrator but configuration and user security can be set to enable users to define column sets for personal and potentially global use.

Please review the COINS online documentation for details about defining column sets and configuration, by using the [Help] icons and then selecting User Guide > Browse Screens > Column Sets.

Notes:
Column sets are available on screens set up by COINS to allow them, and only using the columns defined by COINS. The SY/COLSETS parameter controls whether users are able to use column sets. To allow some users to use column sets and not others, use the Column Sets field in System > User Maintenance.

New in the COINS 11.01 release

- Combined Aging Reports allow you to run a single report that includes both Accounts Payable and Subcontract Ledger aging data.
- New Jobs Report provides information about “Jobs in Process” or “Completed Jobs” created in CRM.
- The Equipment module can now record the person responsible for equipment that is issued or dispatched.
- New reports in HR include a Contact/Dependent Report and an Employer Sponsored Group Health Plan Coverage Report.
- In Job Contract Manager, clients can restrict anything that updates budgets so that budgets only exist for categories that can accept costs.
- In Job Contract Manager, the user can include attachments when emailing change requests or subcontract change requests from the print functionality. Data Marts have been added to COINS OA to capture Change Request Data, Subcontract Change Request Data, and Job Cost and Revenue Data.
- Archive/Reinstate Daily Reports function was added to Job Status.
- The ability to store “snapshot” commitment and accrual values each fiscal period in COINS OA has been expanded so they be used on existing Job Status Inquiries.
- In Payroll, a new field in Tax Authority Configuration allows you to define whether the State should calculate SUTA wages from all other states when applying the SUTA limit.
- Employee Self Service (ESS) timesheet entry lets you enter timesheets directly into a Future Period without going through an approval process or other intermediary processes. See OA_CE-PR034 for details.
- New Project Management Documents Received log stores information about documents received.
- User-defined menus have been extended to allow functions to be appended to standard “%” menus, including tab menus and option menus.
- A new button is available on the Report Status workbench to re-run a report.
- There is a new utility to configure and define email templates for use in COINS.
Many companies embark on a new technology implementation without considering whether they are ready and without truly identifying what outcomes (other than just faster/cheaper) they should be benefitting from as a result of their investment. Making that readiness assessment upfront can have a significant impact on the success of the project.

Construction Executive asks: **What are the best ways to assess whether a company is financially and operationally ready to invest in a new technology?**

Derek Leaver answers

As the company embarks on a new technology, ask questions regarding how it is deployed and the options available for purchasing or licensing it.

Struggle with duplicate entry and replicating information to stakeholders?

COINS Portal framework allows users of COINS to create their own secure portal and define what the stakeholder has access to on the portal. Simplifying how data is entered and accessed is a key component to managing today’s information.

Hiring a third party to create a portal can be costly. COINS Portal framework allows you to build off the data already entered in COINS and grant access via a secure portal. Providing access to information to your customers, subcontractors and employees can save time and money compared to traditional methods.

www.coins-global.com
(518) 242-7200
Q: How long have you been with COINS?
A: I’ve been with COINS for nearly 18 years, starting as a consultant. The first 16 years of my COINS career were spent on site directly with clients, and I’ve had the pleasure of working with some of COINS’ largest clients on strategic projects. In the past two years, I’ve been very involved in shaping the COINS OA product for the US market, working to combine COINS knowledge of the industry with the latest technology to deliver the best product.

Q: Is this a new role within COINS?
A: It’s not so much a new role as an evolution. My implementation experience prepared me for a director role overseeing COINS project managers, business analysts and consultants. The recent appointment of Chris Condiles as delivery manager frees me to focus on strategic improvements to the COINS delivery process and to the COINS product as a whole.

Q: Could you explain a bit about how the interests of US clients are represented in global development?
A: COINS global development is headed up by Steve Jones and a team of Regional Product Directors, of which I am one. Together we are working to develop the product as a global solution while ensuring that it meets the unique requirements of each region. I represent the US, to ensure the needs of the existing US client base and construction market at large are being met.

Q: What do you bring to your role?
A: Having spent the first 16 years at COINS working directly on-site with clients, I have a good perspective on the requirements of existing clients and market demands in general. I also understand the day-to-day challenges of users, especially project managers and other people on the operations side.

Q: What will be your priorities in terms of product development?
A: First, a very big focus on user experience, to make using COINS easier and more intuitive for users: pushing data to the user; incorporating notifications for the completion of specific tasks. I also want COINS to be more usable and valuable for project managers and operations people, for example making it easier to manage change orders on a job. Another initiative is the Crew Daily Report (available as both an OA web application and a mobile app) which facilitates field capture of employee time cards, equipment time cards, etc.; see page 5 in this issue. We will also continue and expand on existing integrations with BIM (see page 6).

Q: Is there a plan for a global development of mobile products?
A: Yes, COINS is actively working on a number of mobile offerings. Mobility offers a huge opportunity for the construction sector and COINS to provide needed information to remote and field employees and to early and accurately capture data. Our current and in development apps include Mobile Technician for Service, a mobile material receipts app, the mobile Crew Daily time capture mentioned above, and COINS on an iPad with key performance indicators (KPIs) for executives.

Q: What do you do to relax?
A: I try to spend every winter weekend on the slopes skiing, either in Vermont or out West, depending on where business takes me. In the summer, it’s the beach and baseball. And let me tell you, it’s a challenge to live in Boston and be a die-hard Yankees fan!
COINS is pleased to announce the opening of the first Widad Inclusion Initiative’s facility in Dubai, the Widad Center, an accredited, alternative educational program supported by COINS Middle East and the COINS Foundation, with the objective of achieving charitable status and self-sustainability by 2015.

Widad is a female Arabic name encompassing love, family, relationships and affection. The Widad Inclusion Initiative is a collaboration of ideas between co-founders Jasmine Swiel and Nicole Fiorentino. The Widad Center aims to provide an affordable, quality, inclusive, community, pre-vocational and vocational learning and working environment for children of all abilities, including those with special needs. This method of inclusion ensures that all children and their parents gain a greater understanding of the issues surrounding special needs and, in doing so, encourages a more inclusive and supportive society.

COINS Middle East became involved when COINS Global Group Chairman, Larry Sullivan and Nigel Cope, CEO Emerging Markets, met Nicole during Larry’s first lecture tour of the UAE when Larry talked about the work COINS Foundation was doing in inclusive education in the UK and the establishment of Cookie Bars as a social enterprise. Nicole was looking to create her own education initiative and wanted to have a Cookie Bar as part of the program.

The Widad Center will initially take children from early years through to Grade 5 and can accommodate up to 120 children in class sizes of 10 or less. Children will also participate in running the on-site Cookie Bar when it opens early next year.

Nigel Cope said, “COINS Middle East was actively engaged in developing the business plan for the Widad Inclusion Initiative and supported Nicole, Jasmine and their team in gaining a license from the Ministry of Social Affairs [MOSA]. We also helped in the negotiations for the property and the provision of furniture. We were also delighted to introduce Walid Al Hashimi, CEO of Sharjah Holding (COINS’ first local customer in the UAE back in 2009) to Nicole and Jasmine; he has since become the Widad Inclusion Initiative’s leading local sponsor.”

COINS Middle staff was also keen to help. Many rolled up their sleeves to help renovate and clean the building, assemble furniture and help Jasmine’s husband Justin and other parents to construct the indoor playground.