



Track-It!

Case Study

Gaining Control Over IT Infrastructure at an Multi-location Insurance Company

Northern Insuring Agency, Inc. is the largest locally-owned independent insurance agency covering the Northern New York region. The agency does business from its three satellite locations in Whitehall, Massena and AuSable Forks, and from a main office in Plattsburgh. It is a full-service insurance agency, writing policies for personal, life and group benefits as well as business insurance.

Overview

Industry

- Insurance

Challenge

- Implement an affordable solution to automate work orders, manage IT inventory and update software across a multi-location infrastructure

Solutions

- Numara® Track-It!®
- Numara Deploy

Business Application

- Help Desk Management

Key Features

- Easy installation in under an hour
- Fast importing of client data
- Automatic creation of tickets from emails
- Searchable knowledge bases for fast resolution
- Real time audits of inventory
- Ability to push software packages to remote PCs

Benefits

- No lost tickets
- Lower call volume allowing time for other tasks
- Better budgeting process through inventory management
- Time saved through remote deployment of software
- Easy access to metrics through robust reporting

The Challenge: Find an automated system to manage IT inventory and deploy software remotely

David Scott, Northern Insuring's IT Director, was busy. He was both the one-man IT department and help desk for the 40-employees of Northern Insuring. David was responsible for managing the company infrastructure, which consisted of 50 PCs used in over four locations, four servers at the main Plattsburgh office, and networking devices – routers, switches, and firewalls – linking all the offices together. As the manager of the help desk, he had the additional task of handling daily support.

When David came to Northern Insuring in 2004, there was no real help desk solution. "We were using Microsoft Outlook," recalled David. "I was really looking for a help desk automation solution that would allow me to track work and do documentation, instead of entering data in Outlook tasks."

His challenge became even greater with his first assignment; David was asked to upgrade hardware to support a new information management system. Unfortunately, Northern Insuring didn't maintain an up-to-date data inventory that David could use for his purchasing decision. "I could either do a time-consuming spot-check, or I can get something that automatically inventories everything," said David.

With multiple locations, David was also concerned with the amount of time he'd be away from the main office manually installing new software and upgrading existing machines. David needed a low-cost help desk software solution that would automate basic request processing, manage hardware and software inventory, and provide tools to update software on its geographically distributed IT infrastructure.

The Solution: Replace a cumbersome database system with a solution that automatically tracks work orders

On his own accord, David went to management to ask for an automated help desk solution that would "track all his work and documentation" in a central location. He had used Numara Track-It! on his previous job and was familiar with its capabilities. He knew that Numara Track-It! was a cost-effective, integrated help desk and asset management solution. "I went right to Numara Track-It!," said David. "Why shop around when I knew that Numara Track-It! worked?"

Key Features: Rapid implementation, two way email, and robust inventory capabilities

Fast installation and data import

Installation was quick – "less than an hour." For David, the LDAP Directory Importer feature removed an important bottleneck to quickly deploying Numara Track-It! Instead of manually entering the user account information into Numara Track-It! – and then manage two separate lists – David pulled existing Active Directory (Microsoft's implementation of LDAP) contact data into Numara Track-It! "I'm already managing contact information in Active Directory, so I might as well have it synch with what's in Numara Track-It!," noted David.

Two way email for better customer service

Without dedicated Tier-1 agents to answer phones, the email features in Numara Track-It! were especially attractive to David. According to David, about 75% of requests come to Numara Track-It! via email. Numara Track-It! allows users to automatically create a ticket by sending an email to a special address. Instead of being tied to the phone, David is free to tackle IT, his other job function, and review support requests when it is more convenient.

David also likes the fact that he can email the user directly from the work order. "I tend to email requesters right from the work order," said David. "It's very useful and I use this feature a lot now."

Knowledgebase for faster issue resolution

David also relies on the Numara Track-It! knowledgebase to speed up the resolution process. After David enters a resolution into a work order, Numara Track-It! automatically saves the text into the knowledgebase. When a similar problem arises later, David can search the knowledgebase and bring up a solution he had previously worked out. "It builds an answer database as part of the work order entry process," said David. "I don't have to really think about it."

"The biggest benefit for me is that Numara Track-It! helps me keep my work organized. Nothing falls through the cracks."

– David Scott,
IT Director

Automatic inventory creates better control

Besides help desk functions, asset management was very important to David. “Before I started, my predecessor would have to make a manual check to learn about available hardware and software,” said David “That’s crazy! I can’t spend my time doing that.” The integrated audit function in Numara Track-It! automatically discovers a networked device, storing workstation information (make, model, CPU, RAM) and software data into an internal database.

David can query the database to produce highly targeted reports – e.g., “all Dell computers with less than 1MB of RAM.” David uses the audit function for multiple purposes. “As an insurance agency, we’re well aware of the value of having a current inventory of our physical devices,” explained David. He also examines the audit information to keep track of the age of the computer in his inventory. Each year David tries to upgrade the oldest computers in his inventory. Numara Track-It! lets him quickly find these machines, allowing him to purchase computers for those users who need it most.

Easy software upgrades and consistent desktops

With multiple sites, managing software upgrades manually is a time-consuming process. “I really didn’t want to spend my time doing repetitive tasks, like installing software,” said David. “My time would be better served doing other things.”

Based on his positive experience with Numara Track-It!, David decided to demo Numara Deploy. As a test, he rolled out a corporate instant messaging system onto a few machines. David quickly saw that Numara Deploy’s simple, effective “drag-and-drop” interface would make short work of a much larger deployment.

In 2007, Northern Insuring purchased Numara Deploy. David began using Numara Deploy for more advanced operations. Numara Deploy has the ability to take a snapshot of a PC – recording the complete set of software that’s been installed.

To get lots of machines to look the same way – e.g., all insurance agents should have Microsoft Word, Netscape browsers, Eudora for email, but Microsoft Outlook should be removed –David takes a snapshot of the initial configuration, adds and removes software as necessary, and then takes a second snapshot. Numara Deploy figures out what’s different and builds a “package” based on those differences.

David can then use Numara Deploy to push the package out to those machines that he wants to share the same software image. After the package is deployed, David refers to Numara Deploy’s reporting function to learn the results. “It will tell you whether the deployment completed successfully or failed, and it tells me if the machine is offline,” said David. “If the machine is down when the deployment occurs, Numara Deploy automatically retries when the PC comes back online.”

Results: Up-to-date asset inventory information and faster software deployment

Easy installation – Northern Insuring was able to complete the installation of Numara Track-It! in under an hour.

Help desk management – For David, having all the work orders in a central database and being able to generate reports was a key consideration: “I wanted a database of my work and be able to produce reports on various metrics.”

Integrated asset management – To have up-to-date hardware and software information, David uses the integrated asset management function to retrieve PC information. The ability of Numara Track-It! to automatically discover networked devices and audit hardware and software enabled David to devote more time to his IT manager tasks.

Automated software deployment – When David has to upgrade the software on many PCs, he depends on Numara Deploy to automatically and reliably deliver software modules. From his office in Plattsburgh, he can push out software packages to machines anywhere on the network. For more complex upgrades, he uses Numara Script, a command language that can run on users’ machines – for example, copy files or edit configuration information.

Excellent service and support – “The Numara Track-It! support has been excellent,” said David.

Track-It!

"The biggest benefit for me is that Numara Track-It! helps me keep my work organized," said David. "Nothing falls through the cracks."

The exciting future for Northern Insuring

"I may look at purchasing Numara Network Monitor," said David. "I do have eight or nine servers, some of them are providing multiple services. I don't like having to manually check the event logs on the servers. I don't have the time. Numara Network Monitor will automatically alert me when a drive is full or network performance degrades."

About Numara Software, Inc.

Serving over 50,000 customer sites worldwide, Numara Software is a global leader in providing practical software solutions for service management to IT professionals. From a single technician running a help desk to 1000 technicians managing a complex service desk, IT organizations of all sizes trust our award-winning solutions, featuring Numara Track-It! and Numara FootPrints, to track requests, automate workflows and support internal and external customers.

Unlike other complex, difficult-to-implement, and costly products, we offer robust, affordable and easy-to-use solutions that can be quickly deployed without disruption to your business. Our flexible solutions can be implemented right out of the box or configured to match your unique IT environment and business processes. They can also be leveraged to support non-IT operations, such as human resources and facilities, allowing you to optimize your investments in licensing, maintenance, training, and support.

We're passionate about helping people successfully manage their IT environments. Find out how we can help you by visiting: www.numarasoftware.com.