

xassets

Discovery & Full Lifecycle IT Asset Management

The Success Story of Andersen Tax

The Company

Andersen Tax, formerly WTAS, was founded in 2002 by 23 former Arthur Andersen partners. Working globally, Andersen Tax is completely owned by its partners and is one of the largest independent tax firms in the United States. The firm is unaffiliated with any financial institution or audit practice, and therefore not restricted in its ability to provide a full range of tax and financial services for individuals and businesses. The company is expanding in the United States and Europe in the near term, with expectations for future growth in Asia and Latin America.

The Existing Systems

Andersen Tax used WASP Barcode Technologies, and they wanted to phase out the system. The company utilized Excel spreadsheets to manage and track hardware and software assets. Maintained manually, the spreadsheets required constant input and updating, and moreover, limited the firm's ability to acquire a comprehensive inventory of deployed IT assets.

Additionally, the existing procurement processes consisted primarily of email and phone communication, without the benefit of a configuration management database (CMDB), where all the specifics of an asset, including status and associated data, could be stored and maintained.

The firm estimated that it had 100 servers (the majority of which were virtualized) and 800 workstations connected to the network.



xAssets worked with Andersen Tax to develop a system that offers full visibility of IT assets and confidence in the integrity of asset identification and registration.

The solution includes:

Efficient generation of assets inherently and via third-party data source integration

Value-added reports and notifications for exceptions of assets outside of their assigned locations

Enhancement of existing procurement lifecycle processes



The Challenge

In October 2013, Andersen Tax sought to implement an asset management software tool that would automate discovery, integration and tracking of its information technology (IT) assets across domestic operations.

The firm established a comprehensive set of objectives for an IT asset management (ITAM) solution, including:

- Ability to import and track all hardware and software assets
- Barcode scanning and importing of data into the ITAM tool
- Support for processing purchase requests, purchase orders and purchase approvals
- A full suite of flexible reporting and output options
- Fully configurable workflow type processes
- Ability to track assets via serial number
- Support for mobile device management
- Datasets that allowed easy manipulation and updating
- A set of predefined, easily compiled reports
- Locally installed toolset, behind the corporate firewall, to facilitate control of database construct and maintenance to minimize impact on their team.

The Test

xAssets conducted a software solution demonstration and presented the flexibility and capabilities to Andersen Tax stakeholders, the technology manager and the managing director of technology services. The xAssets team performed a proof of concept (POC), which included a preliminary scan and analysis of the Andersen Tax IT environment. The POC also encompassed discovering a pilot group of computers and reporting the group's deployed hardware and software. The initial trial indicated that a higher number of IT assets existed than the company anticipated from its records.

The Implementation

Following the successful POC deployment, Andersen Tax chose to implement the full IT asset management suite of xAssets products, including software and services for fixed asset management and financials, IT asset management, service management and help desk, network discovery, barcoding, alerts, asset life cycle and procurement.

The Results—Inventory & Tracking

Within a few months of implementation, Andersen Tax achieved a more in-depth understanding of their IT asset management environment, including an enhanced and current auditable inventory of IT assets:

- Workstations (desktops and laptops)
- Servers (physical and virtual)
- Other network devices (e.g., switches, routers)
- Non-networked devices (e.g., contracts, monitors, software licenses)

In addition to accessing a more precise inventory, the firm can track relationships, locations and ownership of assets. Using xAssets Active Directory integration, Andersen Tax identifies location hierarchy based on the organizational unit (OU) structure throughout the network.

The xAssets ITAM tool also enables the firm to track:

- Parent-child relationships
- Location exceptions – assets outside of their assigned locations
- Ownership changes for assets

In addition to accessing a more precise inventory, the firm can track relationships, locations and ownership of assets.





Software recognition database updates from xAssets ensure that software titles are normalized and newly marketed software or proprietary software is recognized and categorized in appropriate classes.

The Results—Compliance

Software asset management (SAM) processes also improved. Using the xAssets software, Andersen Tax generates license compliancy reports by correlating Microsoft licensing statement (MLS) with records of discovered software installations. A similar process was implemented for Adobe software and customized imports from a third-party data source. Software recognition database updates from xAssets ensure that software titles are normalized and newly marketed software or proprietary software is recognized and categorized in appropriate classes.

The Results—Reporting

The flexible and customizable reporting features of xAssets software enable Andersen Tax to access information on both a scheduled and on-demand basis. Using exception reports, color-coded reports and other value-added custom reports, firm management can make informed decisions when governing their IT asset environment. Reports include timely alerts and notifications for asset warranties and contract expiration.

Integration of the xAssets IT asset management and procurement solution streamlined and improved the process for purchasing assets. First, data is collected from barcode inputs and bulk imports. Next, a copy-and-paste method simplifies and speeds the bulk import process for updating all record types. Email notifications provide immediate feedback of these procurement processes. Imports that include critical data (e.g., purchase and invoice values) are performed weekly to streamline the process of updating assets. These processes keep the ITAM CMDB updated and synchronized.

The combination of vision and objectives by Andersen Tax plus software solutions and services from xAssets resulted in giving the firm full visibility, control and compliance in their IT asset management. The firm, working from an accurate and comprehensive view of the IT asset environment, can make planned, intentional—rather than reactionary—decisions for future acquisitions and allocations.

READY FOR YOUR SUCCESS STORY?

If you are ready to turn your IT asset management into a success story, xAssets can help. You can start by visiting our website and getting a **free trial** of our software asset management solution. Or, feel free to contact me with any questions.

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