ManageEngine
SaaS Manager Plus

CASE STUDY

Patra Corp replaces a manual, multi-team license reconciliation process with SaaS Manager Plus



PATRA

Patra is an agentic AI platform for insurance operations, combining AI agents, human insurance expertise, workflow orchestration, and errors and omissions (E&O) protection. The company supports insurance workflows such as policy checking, certificate processing, endorsement processing, data management, and quote comparison for retail agencies, wholesalers, MGAs and MGUs, and carriers. Patra's platform is built on more than 20 years of insurance operations experience, with 800+ workflows powering the platform and teams across the United States, India, and the Philippines.

Quick facts

COMPANY
Patra Corp

INDUSTRY
Insurance operations technology

LOCATION
El Dorado Hills, California

SOLUTION
SaaS Manager Plus

Background

As Patra's SaaS footprint grew across the organization, the IT team was tracking and reconciling application licenses manually, using spreadsheets and email exchanges across multiple departments. To close the gaps in that process, the team had started building a custom reconciliation system in-house, a development effort expected to take four to five months to complete. This is the point at which Patra adopted SaaS Manager Plus, and the internal build was no longer needed.

Business challenge

- Manual, multi-team SaaS license and user reconciliation
- No centralized view across applications
- Delayed detection of unused licenses after employee offboarding

Most useful features

- Centralized dashboard for integrated applications and users
- Exportable reports in Excel format
- Automatic license and user data sync for connected apps
- Custom App integration for applications without a native connector

Additional benefits

- Described by the customer as an easy, plug-and-play tool to set up
- Extended visibility to AI tool usage and spend
- Reduced back-and-forth across IT, HR, application owners, and finance

Business challenges

Manual, multi-team reconciliation

- License and user tracking was all done manually, with no dedicated tool in place.
- Application owners had to send user lists manually, since some applications contained sensitive data IT couldn't access directly.
- HR provided the active employee list separately, which IT then had to manually cross-reference against the application-level data.
- The process depended on repeated back-and-forth over email and shared files across IT, application owners, HR, and finance.

Delayed detection of unused licenses after offboarding

- Disabling an employee's login in Okta didn't automatically remove the license or subscription seat assigned to them in individual applications.
- Unused seats could continue being paid for until someone noticed the gap manually.
- In at least one case, this resulted in paying for nearly two extra months of an unused subscription.

No centralized view across applications

- There was no single place to see active applications, who held active licenses, and where spend was going.
- Reconciliation had to be rebuilt from scratch each time using disconnected sources.

Earlier, it was all tracked in a spreadsheet that required access from multiple teams, with sensitive data being shared back and forth over email. Now, everything is consolidated in SaaS Manager Plus, and we can access all the data with ease, right from the UI.

Vipul
Automation Engineer, Patra Corp

What changed

Since adopting SaaS Manager Plus, Patra's IT team has been rolling out the platform in stages, with fuller use beginning this past month and continuing to expand. For most integrated applications, license and user data now syncs automatically from the vendor rather than manual collection. The team has found this sync working well across the majority of connected applications, with a small number still going through a reauthorization process. Patra has also used the platform's Custom App integration capability to connect applications without a native integration.

> *It's given us a much better UI. We can see in the live dashboard which applications are integrated and how many active users there are. It's also given us the ability to export reports in Excel, so we can do our reconciliation from there.*
>
> **Vipul**
> Automation Engineer, Patra Corp

Key benefits

Reduced manual effort	The manual, cross-team reconciliation process (and the internal project built to replace it) is no longer needed, freeing the IT team to focus on other priorities.
Fewer manual updates to track	With most applications syncing automatically, license and user counts stay current without someone having to refresh the data manually.
Centralized visibility	A live dashboard shows which applications are integrated and how many active users each has, replacing the earlier process of requesting this information team by team.
Faster detection of unused licenses	Using SaaS Manager Plus, Patra's IT team was able to identify inactive or dormant licenses in applications including ServiceDesk Plus and Lucidchart, allowing seats to be reassigned rather than continuing to be paid for.

Exportable reporting	Reports can be exported in Excel format, and with Okta integrated as a source of truth, the team can compare active licenses against active users directly.
AI usage visibility	SaaS Manager Plus also gives Patra visibility into AI tool usage and spend, extending the same centralized reporting approach to AI-related costs.
Broader team access	Access has been extended beyond the original point of contact to the IT team members who previously ran the process manually, with finance also being given direct access to reports rather than waiting on IT to extract and share them.
Custom App integration for non-native apps	Where a native integration isn't available, Patra has used the Custom App integration feature to bring additional applications, such as Lucidchart, and initially, Okta, into SaaS Manager Plus.
Broad application coverage already in place	Patra has already integrated most of the applications used across the organization, with the ability to add more as future requirements come up.

Patra's rollout is ongoing, with full usage across the IT and finance teams expanding as more applications are brought in and a small number of integrations complete reauthorization.

There aren't a lot of tools out there solving this problem, and mid-size to large companies all run into this issue. It's better to outsource that part of the job to a tool like SaaS Manager Plus rather than build it in-house. When you compare it to the long-term time, effort, and cost of developing something yourself, paying for a tool works out cheaper.

Vipul
Automation Engineer, Patra Corp

About SaaS Manager Plus

SaaS Manager Plus is a SaaS spend and license management platform built to help organizations control SaaS costs, right-size licenses, and cut wasted spend. It gives IT and procurement teams complete visibility into what they're spending, which licenses are actually being used, and when renewals are coming up, so decisions get made on real data instead of guesswork. This is powered by centralized spend and license dashboards, detailed reporting, native app integrations, invoice tracking, and Custom App integration for applications without a native connector. It also tracks usage and spend for AI tools, giving teams visibility into a fast-growing and often unmanaged category of spend.

- Centralized spend and license dashboards
- Detailed reporting
- Native app integrations
- Invoice tracking
- Custom App integration
- Usage and spend for AI tools

About ManageEngine

ManageEngine delivers the IT management tools that empower IT teams to meet organizational needs for real-time services and support. Worldwide, established and emerging enterprises, including more than 60 percent of the Fortune 500, rely on ManageEngine products to ensure optimal performance of their critical IT infrastructure, including networks, servers, applications, desktops, and more. ManageEngine is a division of Zoho Corporation with offices worldwide, including in the United States, India, Singapore, Japan, and China.

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