

ITWorks Managed Services



SmartPath
TECHNOLOGIES
Business Computer and Network Specialists

ITWORKS GOLD
STARTUP AND
ONBOARDING
DOCUMENT



{welcome}

By choosing to utilize the ITWorks system management program, you're making a forward thinking investment in the single thing that your business relies on – technology. Let's face it – without functional technology you can't work. ITWorks is a proactive system developed by SmartPath Technologies that allows us to better manage your network by being alerted *proactively* to problems and allowing us to *proactively* perform maintenance and updates on all of your computers and servers.

Does utilizing ITWorks and performing proactive maintenance on computers mean they won't break, have problems, and need service? Not at all – computers, much like the starter on your vehicle, are mechanical pieces of equipment that oftentimes have a mind of their own. What it does mean is that when problems exist, we are often times proactively notified of those problems before they cause a work stoppage. It also allows us to develop automated routines over time to automatically address and fix repeat problems, and perform normal maintenance that previously had to be done manually, requiring a lot of time and money.

This document will explain from the user perspective how ITWorks functions, and contains important information users of technology in your office should all be aware of. Therefore, **please make sure all of your staff receives a copy of this document.**

{what does ITWorks do?}

On an ongoing basis, ITWorks monitors your computer and server for routine notices about things that may cause a problem – a document repeatedly doesn't print, or the power to the computer unexpectedly shuts off. Over time, we also configure it to let us know about certain things pertaining to your day to day functions - an example is medical billing software. If your office were to utilize a certain medical billing software, and we are able to see a trend in issues that are happening with that software, and we configure ITWorks to notify us and take certain steps automatically to resolve the issue. This is just an example – we massage and customize ITWorks for each client's individual needs over time - **it's an always evolving process.** ITWorks also notifies us when certain things happen on your network – for instance wireless quits working or a printer is running out of ink. Our abilities are limitless – this is where it is beneficial for YOU, the client, to let us know over time certain things that you want to make sure are always working – for example, you may want to be notified every time a certain printer has less than 10% of ink left in its toner cartridge. If you can imagine it, we can probably monitor it.



As an ITWorks clients, we also automatically install all Microsoft Updates – often containing patches for security and functionality improvements in Microsoft Windows and other Microsoft applications. On the flip side, it also allows us to NOT install certain updates that may interfere with your day to day applications.

ITWorks also allows us to perform a number of proactive maintenance procedures on all computers and servers on a weekly basis. Our proactive maintenance procedures include performing hard disk defragmentation, deleting of temporary unneeded files, adjust certain settings automatically related to memory usage to improve PC speed, and at least 15 other maintenance procedures on a weekly basis. It also allows us to control PC bootups and shut downs.

The real power of ITWorks comes as a mix of the monitoring and maintenance procedures. As we see, or you notice, certain repetitive things happening, we are able to examine those things and write automation procedures to fix it. For example, if our monitoring tells us your printer jobs are backing up and not printing, we automatically go out on the network, make sure the printer is on, and if so, clears the document queue. This is just an example – and this is also where your input is helpful. Think of it like this: If X happens, we need to automatically do Y. We notice these things by examining tickets regularly for the same type of problems – but if you notice something you think is a repeated problem – let us know you'd like us to see if we can come up with a way to automatically fix it. In addition, we can leverage this benefit for you to automatically perform certain tasks you are manually doing every day – for example, running a certain report, or checking to see if a folder has all of the required files you need inside of it. It's virtually limitless what ITWorks allows us to do – but we have to have your input to better tailor the system to fit your needs.

We also then produce a monthly executive summary report that shows how healthy your network is. The proof that ITWorks is reducing the amount of network issues is provided in written form once a month.

{what do I need to do?}

As an ITWorks participant, we have some certain things you and your staff need to perform on a regular basis.

1. **Leave your computers logged off but turned on daily** – We will manage shutting down, restarting, and starting your computer. We schedule reboots around the times proactive maintenance takes place. As a standard, we normally reboot your PC's at least once a week. If you'd like us to shut down your computers more often – semiweekly or even daily, we can do that – we just need that information beforehand.



2. We may need to login to your account to troubleshoot issues. For security reasons, we don't want to know your password. In the event we have to perform routine maintenance, we may change your password for you. If we change your password, we will typically change it to the user's first and last name in the following format: Capital 1st initial, lowercase last initial, lowercase last initial, lowercase first initial, 4 digit year (Jane Doe would be Jddj2013 for example) . If you can't login, please try using this email password format. You can then change your password back to whatever you want by hitting CTRL+ALT+DEL and clicking Change Password. We will always attempt to notify your office manager or ITWorks contact person after we change a password, but that person may be unavailable from time to time.
3. Please inform us of any tasks you may need to use your computer for after business hours. We will then temporarily halt maintenance procedures from taking place during that time. If your computer always is in use at a certain day or time after hours, please let us know that and we will reschedule our maintenance procedures around this time.
4. We have the option to chat with you on your computer. When we do this, an Internet Browser window will open. You will have a box at the top you can chat with us with. It's important to not just close the chat window when we start a chat – if we want to talk to you, it's probably for an important reason. If chatting through another medium is better, like MSN messenger for example, please let us know that and we will utilize that form of communication.
5. We will install patches and Windows updates either once or twice monthly. A patch is a piece of software that is released to fix a problem. If a critical patch has been released, we will install it at the time it becomes available. We will install all updates once monthly – if no critical updates have been released, all patches will be processed during the last week of the month. We will attempt to always e-mail or call your office manager or ITWorks contact person prior to performing patching.
6. We understand if technology isn't working, you aren't working. Our ITWorks clients receive priority service. It is important to understand the ITWorks priority system so that both you and we can properly gauge the severity of the problem. We utilize a four level priority system. When submitting a ticket or calling us with a problem, please note what you feel the priority level is. While we understand every issue you have is a big deal, we must prioritize the problem. Our priority system is as follows:
 - a) Critical – Over 90% of your office is unable to work at all. Examples of Emergency priority: Network and/or Wireless outage, server failure, or all users are unable to work in software packages your office utilizes on a regular basis. When you have an emergency, you are our top priority and we focus all efforts necessary to get you back to normal functionality as soon as possible.
 - b) High – Defined as 10-40% of the users/computers being totally unable to work, internet outage, retrieving lost files from backup, a printer not working for an internal deadline you have such as meeting, a single PC has a virus or spyware infection, or a single component of a software package you utilize regularly is unable to work.



- c) Medium – Can be defined as one computer/user unable to perform one function but is able to continue working in other applications or by using an alternate computer. Problems with certain programs on one computer is generally classified as high priority.
 - d) Low– General questions, problems that don't affect users ability to work. Configuring your application to print to a different printer, setting up a scanner, or application issues such as using a webcam to take patient pictures or being able to put a scanned picture into a document. **If it doesn't affect your ability to keep working, it's probably normal priority.**
7. We have guaranteed response times to Emergency, Urgent, and High priority tickets. It's important to understand our response time guarantees do **not** guarantee the issue will be resolved in the allotted time period. It would be impossible for us to guarantee this, as often time we are at the mercy of others – software vendors, internet providers, etc. and their time schedule. It **DOES** guarantee that we will begin working on the issue within the allotted time period during business hours. Over 85% of the time, we are able to correct the issue within our guaranteed time frame. We ask for your reasonable understanding that we can't control the hours/availability of software support, or vendors of technology services and products. *We reserve the right to assign your support request to what we feel the appropriate priority level is.* We guarantee we will begin working on Emergency priority tickets – something causing a complete work stoppage – within 3 hours. Urgent priority tickets will be addressed within 5 hours, high priority tickets will receive attention within three business day. Your understanding of our priority triaging system will help us perform better service.
 8. We ask you to use our online ticketing system whenever possible for submitting issues and questions to us. A separate document will be sent to you on how to use our online portal. That being said, please call if you feel you have an emergency or urgent issue. If you call our office after business hours or on the weekend, you will be prompted to leave a voicemail. On call technicians and management personnel are immediately notified of your message automatically. Our office number is 270-205-4709, and you may always text message 270-883-1053. Please note that number only receives text messages – it is not for voice calls.
 9. Over time, you'll see us less and less in your office. This **isn't** an indication of you needing less service, but it **is** an indication that our proactive monitoring and maintenance is doing what it's supposed to – making you have fewer problems. The second reason you see less of us is because we are able to fix a number of problems remotely by connecting into your computer. This allows us to fix your issues quicker, and is better for our staff because more can be accomplished in a day than would otherwise be accomplished if they had to spend hours of drive time daily. We will always attempt to call or display a message on your screen before we connect in.
 10. We have a confidentiality agreement in place between our staff members and your company. Therefore, you don't need to be concerned about having files or documents open containing private information when we connect in.



11. Occasionally, we will simulate problems unannounced. We do this for dual purposes: one, to test our response time, and two – to test your backups and make sure we are able to successfully restore files. We will not simulate problems that would affect your work flow.

{creating a service ticket (I HAVE A PROBLEM! HELP!)}

You may create a service ticket one of several ways when you have a problem.

1. Phone – Call our office at **270-205-4709**. A live person will pick up during business hours. After hours, you will receive an automated voicemail message. *Please leave a message – it will be sent to an on-call technical staff member and/or an administrative staff member who can notify an on-call technician.*
2. Text – We have a dedicated text number. You may text our office any time with a problem, question, or any other need. The office text number is **270-883-1053**. We encourage you to save this number in your mobile device. This is a text only number, it does not receive voice calls. Texts are received by all administrative and service management staff.
3. E-Mail: You may e-mail support@smartpathtech.com with your question or problem. A ticket will be created based off of your e-mail.
4. The client portal, available at <http://www.smartpathsupport.com/>. You will receive your own dedicated login name and password to the client portal. **We heavily recommend utilizing the portal to submit service requests.** Doing so not only allows you to submit problems, but also allows you to see the resolution of previous problems and track the current status of open tickets and issues you may have. *If you do not have a portal login yet, contact our office and one will be created for you.*

{t h a n k s}

We know that our ITWorks proactive maintenance program will allow your technology to work together more cohesively, resulting in you having fewer noticeable IT and technology issues. We understand this is a totally different way of thinking from the old school “break/fix mentality” – where things break, then we reactively fix them.

We will regularly schedule meetings with you to discuss trends and noticeable things we see in regards to your technology and network. We intend to be your “trusted advisor” for all things technology – and we do request your active participation to attend scheduled meetings and help us by pointing out your pain spots – things that cause you problems – to us. While we work magic with computers and networks, we aren’t psychic and don’t know issues you have that cause you problems and delay without you point them out to us.

We look forward to providing the best technology and network services available anywhere in the United States.

We make your network work.

