

Resource

ITworks Managed Services

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IT WORKS

STARTUP AND
ONBOARDING
DOCUMENT





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 IS THE ITWORKS PROGRAM? }

On an ongoing basis, ITWorks monitors your computers and server for issues 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 a piece of software that everyone at your company uses. If your office were to utilize a certain line of business application, and we are able to see a trend in issues that are happening with that software or problems you report about the software, 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. This monitoring allows us to perform service faster – for example, we can call your internet provider as soon as the internet connection goes down, because we are alerted to the fact your office is offline.

As an ITWorks client, 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. We also automatically install updates to other common applications like Acrobat Reader, Java, Google Chrome, etc. as needed.

ITWorks also allows us to perform a number of proactive maintenance procedures on all computers and servers on a daily, weekly, and monthly basis. Our proactive maintenance procedures include keeping your hard drive organized, deleting of temporary unneeded files, adjusting certain settings automatically related to memory usage to improve PC speed, and at numerous other maintenance procedures on a weekly basis. It also allows us to control PC start up's 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 perform asset auditing and management on a daily basis of the network and all connected devices. This allows us to have daily updated information about all of the technology devices in your office. Having this information allows us to serve you quicker, and provides your company with detailed information about all equipment should it be needed for theft, insurance, or other purposes.

We then produce a monthly executive summary report that shows the health of the network, antivirus logs, firewall logs, a listing of all issues over the past month and our response time to



those issues, and more. The proof that ITWorks is reducing the amount of network issues is provided in written form once a month. This report is distributed to our primary contact and/or management.

{WHAT DO I NEED TO DO?}

As an ITWorks partner, we have certain information and tasks that you need to know about.

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 once daily in the overnight. Please contact us if this doesn't work for you so we can schedule maintenance and updates at a time that does work. If you are a traveling laptop user, your laptop simply needs to be connected to WiFi (at work, at home, or anywhere) at night as much as possible. We understand leaving traveling devices on is not always possible. Security updates and maintenance will catch up the next time it's on in the evening, but we don't want to let it get too far behind.

Security and Passwords is very important. We may need to login to your computer/user account to troubleshoot issues. For security reasons, we don't want to know your password. In the event we have to perform routine maintenance or access your computer to work on an issue, 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 and ! mark (Jane Doe would be Jddj2017! for example).** We will always attempt to notify you or our primary contact if we change your password via e-mail, phone, etc. *If you can't login, please try using this password format.* You can then change your password back to whatever you want by hitting CTRL+ALT+DEL and clicking Change Password. **Always change your password after we reset it to the default password described above (initials + year).** 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. *Important: Sometimes, we may have to login to your computer using an administrative account. If you can't get logged in, make sure that the username you are logging in as is indeed your username.* If for some reason we do need your password, we will ask you to call us back at our main office number with it – 270-205-4709. Please do NOT give your password out to anyone – including us – without calling us back. **We take security very seriously.** If, for some reason, the primary contact needs an administrative password they do not know, we will not give it out over the phone without hanging up and calling them back



2. at a number known to us. We can not give out any password without the dual call system, and you should not provide us with any passwords without the dual call system. ***Remember, if you can't login, try the initials + year combination described above.***
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, a chat window will pop up, and often times, we'll just use a blank notepad window to leave you a message.
5. We track every issue that you have and any interaction that we have with you in a ticketing system. We understand our ticketing system can generate a lot of e-mails and they become easy to ignore. We attempt to have a delicate balance, but have to favor over-communicating and opposed to under-communicating based on extensive client feedback. Our ticketing system will typically generate e-mails to you with updates when you have a problem unless your company has opted out of receiving them. Complicated or detailed problems may generate multiple e-mails to you. We understand the volume of e-mails you receive can be inundating, and it becomes easy to ignore ticket based emails, however, these e-mails keep you informed about where we are in the resolution of your issue. Typically, the following are e-mails you would receive when you have a problem.
 - a) An e-mail when a ticket is created that includes a ticket number and summary of the issue. *The ticket number is useful to us in order to quickly reference your issue.*
 - b) An e-mail each time an engineer or staff member does work related to your problem. Often times, a single ticket may get worked on multiple times until it is resolved. Each time work is performed, you'll get an e-mail with the engineer's notes about what they have done.
 - c) An e-mail anytime we have questions or comments about your ticket that may not be directly related to performing work on the ticket.
 - d) A summary e-mail when the issue is resolved that contains the full engineering notes about what was done to resolve the issue.

You can always reply directly to a ticketing e-mail. Doing so will place the contents of your e-mail into the ticket and notify the assigned SmartPath team member on your ticket. *If you want your organization to opt out of all e-mail notices, please send a request to support@smartpatbtech.com. Even if you opt out, you can still see the status of all issues in the client portal.*



6. We will install patches and Windows on a routine basis daily as they are released. 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. Occasionally updates can affect usability, change the way something looks, or break something. This is a rarity, and when it occurs, we can resolve the issue quickly.
7. 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 work.
 - d) Low – General questions, problems that don't affect users ability to work or that can be worked around. 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 low priority.**

We have guaranteed response times to both regular and emergency 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 90% of the time, we are able to correct the issue within our guaranteed time frame, and we are able to begin to work on your problem within the time frame 98% of the time. 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



8. stoppage – within as immediate of urgency as we can. Urgent and high priority tickets will be addressed as quickly as we can divert resources to them. Your understanding of our priority triaging system will help us perform better service. **All ITWorks clients receive priority response over reactive support clients.**
9. **We ask you to use our client portal system whenever possible for submitting issues and questions to us at www.smartpathsupport.com.** We are including a guide on how to access the portal, but if you have problems or don't know/forget your password, please e-mail or call us and we will resolve the issue and get you logged in. You can email support@smartpathtech.com with client portal requests.

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 and will respond as soon as possible. We are available 24/7/365. Our office number is 270-205-4709. You can also e-mail support@smartpathtech.com with any support request.

The client portal system also lets you see the current status and notes regarding any open tickets that you have, and lets you reference all past tickets so you can have a knowledge base to refer to of how we've resolved an issue in the past.

10. 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.
11. 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.
12. One of our most valuable roles to you is one of a consultant. If you have a manual process that you'd like to automate using technology, if you need help evaluating software, or if you want to develop ways to become more productive or solve a business problem using technology, please let us know! We work with hundreds of other offices and know what works and what doesn't. We know what questions to ask of vendors. Bring your thoughts to our attention and let us help you.
13. 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.

14. If desired, we'll perform vendor liaison services for you. This means that we'll handle working with your business machine vendor, software company, internet provider, etc. for you. We track your vendor issues in our ticketing system just as we track problems, which means we have a complete record of all of your interactions with the vendor, and we have historical data to reference when there is a problem. If you would like for us to perform these services, you may have to sign a letter authorizing us to work on your behalf. We have this form letter available and it just requires your signature.

{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.*
2. 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.
3. The client portal, available at <http://www.smartpathsupport.com/>. A client portal guide is attached to this document. 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 at support@smartpathtech.com and one will be created for you.*
4. There is an agent icon on your desktop that you can use to create new tickets directly from your computer without requiring any kind of login. Instructions are provided below for it.

{THANKS}

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 reactive “break/fix mentality” – where things break, then we reactively fix them.





We appreciate your understanding that technology does have issues from time to time – while we wish we had magical IT powers, Murphy’s law sometimes comes into play. Please know that your problem is our problem, and we will always work as quickly as possible to resolve it.

We will schedule meetings with your company throughout the year 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.

270-205-4709



www.smartpathtech.com



SmartPath Technologies, LLC



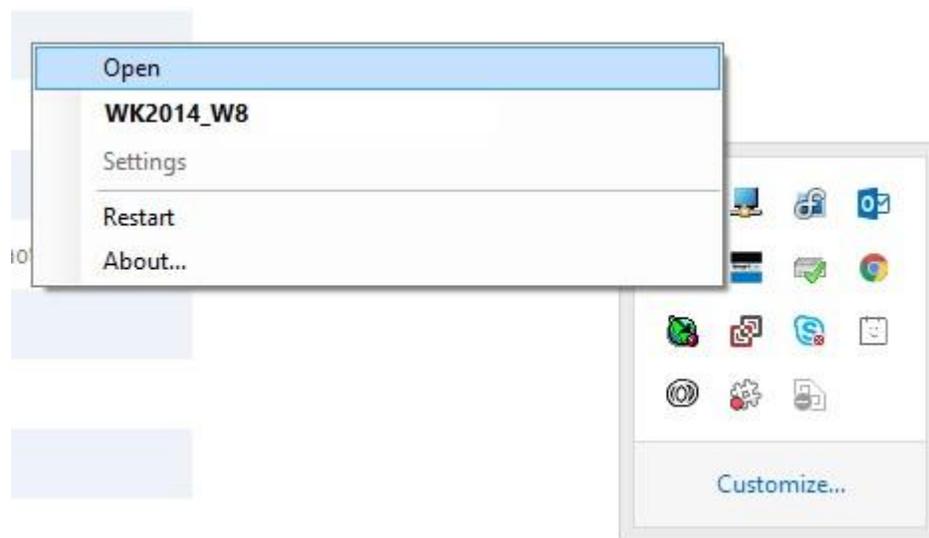
CREATING A TICKET DIRECTLY FROM YOUR COMPUTER

It's quick and easy to submit a ticket directly from your computer. Here's how:

- 1) Look down in the tray of icons next to your clock for the SmartPath agent icon (you may have to click the up arrow-head to see all of the icons). It looks like this:



- 2) Right click the icon. You'll see a menu of options that look similar to below. Click the open option with your left mouse button.



- 3) Click the tab at the top of the window that opens up that says tickets. Click the button that says New Ticket.



- 4) You'll be prompted to enter the title (subject) of your ticket and the description of your issue. Please be as specific as you can! Click submit – that's it!

You'll also notice a close button – this button let's you close any existing ticket you may have open. Doing so will complete it in our system and should only be used when you are certain a ticket no longer needs to be open.



CLIENT PORTAL INSTRUCTIONS

The client portal is designed so you can inform SmartPath of technical problems, track the resolution of those issues, and see the history of past problems you have encountered and how they have been solved.

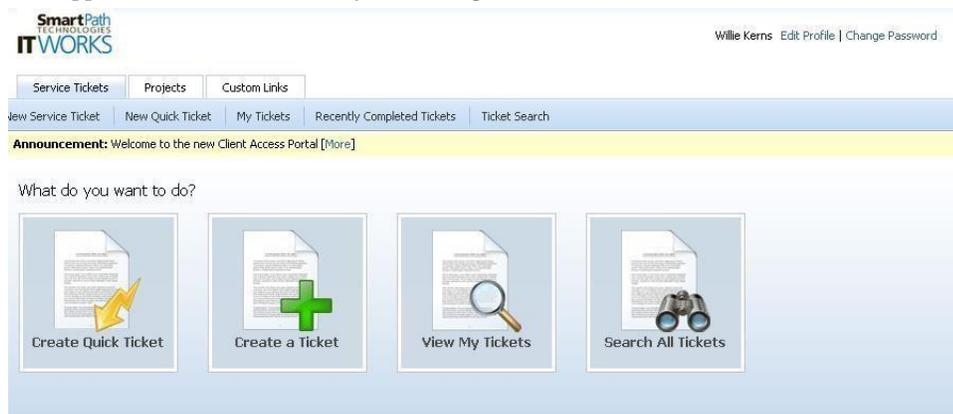
Accessing the Portal

The portal is also available directly at www.smartpathsupport.com

Feel free to bookmark the link for easy reference.

Creating a Ticket

1. Use your provided username and password to login to the portal. The username will be your email address. If you don't have or forgot your password, call SmartPath at (270) 205-4709 for assistance.
2. Once you have logged into the Client Portal, you will be presented with a screen like this:



Click on the “Create a ticket” button. The Quick Ticket button works as well, but does not allow you to provide as complete details, which can hamper the speed of repairs.

3. Drop down under Request Type, and pick the type of problem you are having. If none of the options look correct, pick “General Request”. Then, select the priority of the ticket:
 - 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.

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



- b. 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 work.
- d. Low – General questions, problems that don't affect users ability to work or that can be worked around. 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 low priority.**

This is just a guide. We give you the ability to judge the level of your problem. However, when we get the ticket, we can change the priority if we deem it categorized incorrectly. Keep in mind all tickets submitted, regardless of priority, will be addressed within the timeframe defined by your agreement level.

4. In the ticket title field, put in a brief summary of the issue, for example, "Can't print to the LaserJet 4050." In the description field, put a detailed description of the issue you are having, for example, "When I try to print to the printer from Microsoft Word, I get an error message saying the printer is offline. I can print to the copier with no problem."
5. In the next section, your name will be the default selection and doesn't have to be changed. If you are reporting the problem for someone else in your organization, you can drop down and pick the name of the person for whom you are submitting a service request for.
6. Next, choose a configuration item if possible. A configuration item is SmartPath's way of documenting information about a piece of hardware or software, such as a computer or printer. Selecting the appropriate configuration item can save the technician time instead of calling and asking which device is having the problem. You do not have to select a configuration item. To do so, click the button that says "Associated With" and pick your name or the name of the person who is having the issue. The last box in that section says "Configuration Item".
7. The last section, Follow-on questions, will provide valuable information to that will allow us to troubleshoot and resolve the issue much quicker. The follow on questions will be specific to the type of request you indicated at the top. For example, if you pick "Printer Problems" at the top, the Follow-On questions will be things like, "What printer and where is its location? Can anyone else print to the printer? Does printing to an alternate printer work?" These questions will allow us to handle the issue much quicker than having to call and ask you the introductory questions to begin working on your problem.

Viewing and Editing Your Existing Tickets

From the main login page, click the "View My Tickets" button. Clicking on this button will allow you to view all the tickets you have open. When you click on the button, you will



1. see a ticket number, the title of the ticket, and the date the ticket was created. Click on the ticket number and you'll be taken to a screen that shows all of the information about this support request, what work has been done on the ticket, and where the ticket currently stands.
2. You will notice at the top of the screen an “Add Note” and “Add Attachment” button. While we are working on an issue and have your ticket open, you can use the “Add Note” to submit additional information to us regarding the ticket. If you click the add attachment button, it will allow you to upload an attachment – for example a word document with a screenshot of an error message you are receiving, or a copy of a file you are having a problem with.

Viewing Past Tickets

Often it's desirable to reference past tickets to see how a problem was solved or what course of action was taken with a certain issue. The Search All Tickets button will allow you to see and search all closed and completed tickets.

Viewing All Tickets

If you have been given manager level permission in the portal, the “Search All Tickets” button gives you access to all tickets for your organization.

If you have any questions or require assistance, please contact SmartPath by email or calling 270-205-4709.

Screenshots

It often times helps us to be able to see an error message or what is on your screen at the time you have a problem. You can take a screenshot of your monitor quite easily and attach it to your ticket or e-mail it to us. There are two quick and easy ways to take screenshots.

1. Hit the Print Screen button (at the top of the keyboard above the arrow keys). Then, launch Microsoft Word or Microsoft Paint and paste the screenshot either by hitting the CTRL+V keys together, right clicking and choosing paste, or going to the Edit menu at the top and then clicking paste. Then save the document and attach it to your ticket or email it to us.
2. Use the snipping tool built into Windows. Hit the Windows key on your keyboard, and type the word snip – you'll see the snipping tool pop up. Click on it. The snipping tool allows you to use your mouse to draw a box around an area on your screen to capture it. Click the Save button, and save the screenshot. You can then attach that screenshot to your ticket or e-mail it to us.



Important Information to Print and Keep Handy

SmartPath Support – 270-205-4709 or support@smartpathtech.com

SmartPath Support Portal – www.smartpathtech.com

After Hours Support – 270-205-4709, and dial ext. 501 to leave an emergency voicemail.

Can't login?

- 1) Try using the password we typically will reset accounts to – Capital first initial, lowercase second initial, lowercase second initial, lowercase first initial, the current year, and a !.
For example, John Doe's reset password would be Jddj2017!
- 2) Make sure the username is your username and not administrator or another username.

Please leave your computer logged off but turned on at the end of each day!

Thank You!

