Thank you for choosing eResources, LLC as your partner in technology!

We are looking forward to addressing your technology needs. Before getting started with our ITonDemand Service, we need your help in gathering some items and information that will help us better serve you.

Included in this document, you will find our Onboarding Procedures (2) and Getting Started Checklist (4). Please review these sections and complete the Getting Started Checklist, obtaining necessary items and information, before our Onboarding visit.

If there are items on the checklist that you are having difficulty identifying, do not hesitate to contact us. We are more than happy to assist you in locating this information, or answer any questions you may have. We will reach out to you shortly to schedule the onsite onboarding visit.

We look forward to meeting with you.

Best Regards,

Nathaniel Breitbach

VP of Operations
eResources, LLC

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ITonDemand Service Onboarding Process

The ITonDemand Onboarding process is quick and simple. The greatest weapon in the IT arsenal is information. Based on the availability of information, the ITonDemand Onboarding process should be expected to take place within a 24 to 48 hour window. Please refer to the outline below for detailed information pertaining to the Onboarding process. Here's what to expect:

1. We install our remote monitoring and management agent
   a. The remote monitoring and management agent is installed on a server within the client environment. From this point, the agent is deployed to all other machines in the environment. This silent process, taking only minutes to enable, causes no disruption to the users, and can be executed remotely – so long as all servers and computers are turned on.
   b. Detailed information about each machine is automatically sent through the monitoring and management tool, and recorded in secure ITonDemand databases. With these agents in place, we will be able to gather important information from each and every computer and server.
   c. Once the agents are installed on the machines, we can immediately begin troubleshooting any basic issues that your users may be experiencing through our Help Desk - even before the Onboarding process is entirely complete.
   d. All additional services will be configured within 48 hours of successful deployment of agents to each machine within the client environment.
2. You complete the Getting Started Checklist (Below)
   a. We encourage you to complete the Getting Started Checklist to the best of your ability. This document will assist you in gathering necessary files, paperwork, and information regarding your current network. Completing the guide is beneficial to all parties and will save a great deal of time during the ITonDemand systems auditing process.
3. eResources onsite visit
   a. The length of the onsite visit greatly depends on the size of your organization, however, is typically completed in one business day or less by our technicians.
   b. Meeting with the Client
      i. Our technicians will sit down with the client liaison(s) to discuss the Getting Started Checklist to obtain the information that was gathered by the client prior to the onsite meeting.
      ii. eResources Technicians will tour of your office so that we can gain an understanding of the floor plan and note specific locations of critical network hardware.

   iii. Throughout the onsite visit, technicians will gain an understanding of the client's common issues or concerns regarding their IT environment.

  c. Additional onsite work and processes

   i. Documentation of all hardware and the physical location of each machine will assist technicians in locating machines when service is required.

   ii. Duplication of all software disks to a server repository, allowing software to be quickly distributed throughout the environment, if necessary.

4. New Client Finalization Process

  a. The remainder of the Onboarding process can be done remotely and behind the scenes.

   i. Documentation of your information in our systems

   ii. Creating administrative accounts for ITonDemand to use in your environment

   iii. Installing various services such as AntiVirus and Remote Backup

   iv. Implementing best practice configurations for existing services that will remain in your environment.

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ITonDemand Service Getting Started Checklist

☐ **Floor Plan of your business suite:**

Please provide a basic floor plan of your business suite, identifying each workstation. We ask you label each workstation with the current user's name. During our onsite audit, we will edit the floor plan to include additional information.

☐ **Access to your office and server room:**

In the event we need to be onsite during non-business hours, we will need access to your office and server room. Please be prepared to provide some method of entry, such as keys, key cards, combinations, or security codes that may be needed to access these areas. You will be notified prior to our entry into a secured area.

☐ **List of employees:**

To streamline communication between our technicians and your users, we request a detailed user list. Please include the following information for each employee that will be supported.

- First and Last Name
- Email Address
- Direct Line or Extension
- Cell Phone Number
- Title
- Location/Workplace Address (Particularly for remote employees)

☐ **Billing and account information for technology services:**

We request a list of service providers, complete with contact information and service account numbers, to increase the efficiency of our troubleshooting process and assist in managing the vendor relationship. Please have a copy of your most recent statements from the following service providers:

- Internet Service
- Domain Name Registrar/Hosting Services
- Email
- AntiSpam
- AntiVirus

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☐**Documentation from previous IT vendor(s):**

Your previous IT vendor(s) should have returned your network documentation. Having this information will give us a head start on our audit. eResources will verify the accuracy of all information provided.

☐**Domain Administrator Account credentials:**

We will need access to your network to create an administrator account. This will allow us to install our software and assist you with your IT needs.

☐**Username and passwords of network devices:**

Please provide us with user names and passwords to your various hardware devices, for the following types of devices:

- ☐ Network Storage Devices
- ☐ Printers
- ☐ Wireless Access Points
- ☐ Firewall
- ☐ Internet Modem or Router
- ☐ Network Switches

☐**Basic workstation configuration:**

In order to successfully manage your network, we need to collect some general information about the computers and preferred settings within your work environment. This will help us in the future when configuring new computers that you may purchase. We understand that various users or departments may have specific configuration needs; but at this time, we are just looking for a generic baseline configuration. Please provide the following information:

- Do your users share a printer?
- What version of Microsoft Office are you currently using?
- Do your users regularly use any programs or applications other than those included in the Microsoft Office Suite?
- Please provide the names, license keys, CDs/DVDs, and any additional information you may have pertaining to each application used within your environment, including your Microsoft Office Suite.

☐**Mobile device information:**

To best serve the needs of users within your environment, we need to know if your employees use phones, tablets, or other portable electronic devices to work remotely or send and receive company email.

- If your employees are currently using mobile technology to access company email, are they using personal or company issued devices?
    - o What types of devices are currently being used by your employees for this purpose?
        - ▪ Blackberry
        - ▪ Android
        - ▪ Apple
- If your company does not currently use mobile technology, please let us know if this is something you would like to implement in the future.

☐**Wireless information:**

Do you have a wireless network in your office? If so, please provide us with the network name and password. This will help our technicians access the internet with our laptops while onsite and help build our documentation on your network for future support.

☐**Remote Access:**

Please let us know if your network is configured to allow users to work from home, or another offsite location.

- If you are able to access your network while away from the office, please let us know the steps you take to do so.
    - o Does your company use Microsoft Terminal Services, VPN Client Software, or something else?
- If you company does not currently have the capability in place to work remotely, please let us know if this is something you would like to implement in the future.

☐**List of common/recurring complaints or issues related to your technology:**

Most companies come to us with a "laundry list" of complaints related to their network, mobile devices, and computers. We encourage you to compile a list of these concerns, identifying the user(s) experiencing the problem, so we can efficiently and effectively address the needs of your employees. Using this list and the results of our initial audit, our technology experts will be able to resolve your noticeable problems with the highest level of priority.