

# IT Portal

## IT PORTAL ONBOARDING GUIDE

## Introduction

This document was modelled after a discovery done by an MSP to onboard a new customer. All aspects of the infrastructure was documented by the onboarding team to ensure the helpdesk will have all they need to support the new customer. The next pages has a listing of items that are generally collected doing documentation. Though the thought here is to show you how we document using the IT Portal, you can always leverage this document to assist with your current documentation processes.

- **Company Synopsis**

The IT Portal will start you out with your company and a test company. If you have multiple companies to support, you will want to add additional companies for each of them. This will allow you to view information relating to these companies under their sections of the IT Portal. Once you have companies and contacts defined, you can then proceed to start adding additional users. User accounts must have contacts assigned to them for naming and addressing purposes.

- Who the Customer is and their line of business (Company Synopsis Page, Options Menu)
- Physical location(s) (Add Menu → Sites)
- Hours of Operation (Company Synopsis Page, Notes )
- Primary Contacts and Stakeholders (Company Synopsis Page, Options Menu to select an existing contact)
  - Email
  - Phone
- After hours Contacts and IT Contacts (Company Synopsis Page, Notes )
  - Email
  - Phone
  - When to contact and Severity
- General Remote Access Information (Company Synopsis Page, Remote Access Notes )
- [Import from ConnectWise KB](#)
- [Import from AutoTask KB](#)
- [Import from CommitCRM KB](#)
- [Import Companies and Contacts from a text file](#)

5

Synopsis > Handover Mgmt Corp

**Handover Mgmt Corp**

Options ▾

Managing each property as if it was our own!

3978 Broadway Ave  
Suite 129  
New York , NY 10018  
 Business Phone: 212-555-1234  
 **3 Account Expirations**  
 **1 Agreement Expiration**  
 **1 Device Warranty Expiration**

Active - Start Date: 3/4/2015  
 Engineer: Jim Jenkins  
 Team: Network Engineers  
 Manager: Jim Jenkins  
 Contact: James Dowell  
 james.dowell@hmc.local  
 212-555-1212 x123

**Notes**

Jim Jenkins - 6/1/2015 2:11:03 PM

During business hours speak with Mike. Contact James after hours. Virtualization project under way!

**Remote Access**

Jim Jenkins - 3/4/2015 10:25:14 AM

Remote in via citrix.hmc.local

Citrix Receiver or client us the ip address 204.39.28.13

**General**

|            |               |             |         |
|------------|---------------|-------------|---------|
| 6 Accounts | 3 Agreements  | 1 Contact   | 2 Sites |
| 1 List     | 1 IP Networks | 40 PC Users |         |

**29 Devices**

|                 |                 |            |            |
|-----------------|-----------------|------------|------------|
| 1 Backup Device | 1 Blade Chassis | 1 Firewall | 23 Servers |
| 3 Switches      |                 |            |            |

**23 Services**

|           |            |                  |           |
|-----------|------------|------------------|-----------|
| 1 BackEnd | 4 Citrix   | 3 DC             | 2 DHCP    |
| 3 DNS     | 2 Exchange | 1 File           | 3 Print   |
| 1 SAV     | 1 SQL      | 1 Virtualization | 1 vSphere |

**5 Documents**

|               |             |
|---------------|-------------|
| 4 Install Doc | 1 Site Pics |
|---------------|-------------|

**20 Configuration Items**

|                |             |         |             |
|----------------|-------------|---------|-------------|
| 3 Applications | 2 Databases | 1 DCs   | 8 Disks     |
| 1 LUNs         | 2 Software  | 1 SSIDs | 2 Web Sites |

- **Logical Groupings**

You should consider documenting the sites and facilities. Facilities are groupings of devices that exist in a site. If a site was considered a campus, a facility can be a building in that site, a floor, a suite, etc. Also consider creating IP Networks that correspond to these sites. Viewing your customers in one of these three views will give you a good understanding of their network environments. You can alternatively upload network diagrams and attach them to Sites, Facilities, and IP Networks for a more visual representation of the environment.

- Sites (Add Menu → Sites)
- Facilities within sites (Add Menu → Facilities)
- IP Networks (Add Menu → IP Networks)
- Network diagrams if applicable (Add Menu → Documents)

| Network LAN   |                 |           |                |                                       |                           |                      |
|---|-----------------|-----------|----------------|---------------------------------------|---------------------------|----------------------|
| Core VLAN for infrastructure.   |                 |           |                |                                       |                           |                      |
| <div> <div> <div>Network: 192.168.59.0</div> <div>Subnet Size: 255.255.255.0/24</div> <div>DHCP Server: hmc-ASA01 - 172.16.0.27</div> <div>Default Gateway: hmc-ASA01 - 172.16.0.27</div> <div>VLAN ID: 1</div> </div> <div> <div>Total IPs: 256</div> <div>Usable IPs: 254</div> <div>DNS Server 1: hmc-ad02 - 192.168.59.232</div> <div>DNS Server 2: hmc-ad02 - 192.168.59.232</div> </div> </div> |                 |           |                |                                       |                           |                      |
| Devices in IP Network   |                 |           |                |                                       |                           |                      |
| DeviceType  | Device          | Site      |                | Description                           | Make                      | Model                |
| Backup Devices  | HCM-UNT-R833    | Main Site | 192.168.58.111 | New Unitrends Appliance               | Unitrends                 | Recovery-833         |
| Blade Chassis   | Dell-VRTX       | Main Site | 192.168.59.212 | Blade Chassis for Servers and Storage | Dell Computer Corporation | OptiPlex GX1 450MTbr |
| Blade Chassis   | Dell-VRTX       | Main Site | 192.168.59.251 | Blade Chassis for Servers and Storage | Dell Computer Corporation | OptiPlex GX1 450MTbr |
| Servers   | exchange-server | Main Site | 192.168.59.245 | Exchange 2003 Server                  | Dell Inc.                 | PowerEdge 1900       |
| Servers   | acct-server     | Main Site | 192.168.59.204 | Accounting Server                     | Dell Inc.                 | PowerEdge 2900       |
| Servers   | adp-server      | Main Site | 192.168.59.244 | Payroll Server                        | Dell Inc.                 | PowerEdge 1900       |
| Servers   | citrix-server   | Main Site | 192.168.59.248 | Old Citrix Metaframe Server           | Dell Inc.                 | PowerEdge 1900       |
| Servers   | ad-server2008   | Main Site | 192.168.59.254 | 2008 Domain Controller                | Dell Inc.                 | PowerEdge R710       |

- **Vendor Information, Licensing, and Agreements**

Document agreements expiration, software subscription dates, domain names, SSL certificates, warranties, and licenses. Additional information you can document include license keys and support information like account numbers. Login accounts should be documented under accounts discussed further below and a relationship should exist between the account and agreement.

(Add Menu → Agreements)

Licenses - VMware vSphere Standard
 

Options ▾

Notes

VMware Service Activation/Renewal Confirmation

Dear VMware Customer,

Thank you for renewing your Support and Subscription (SnS) from VMware. This email is a confirmation of your SnS renewal for your records.

Account Number

 : 141266363
 

Account Name

 : HANDOVER MANAGEMENT CORPORATION
 

Procurement Contact

 : James Dowell
 

Customer Email

 : jamesd@hmc-local.com,
 

Contract Renewal Number #

 : 30213251 [R:1U:10MAY15 23:27:27]
 

PO #

 : 70-MER69
 

Reseller PO #

 : 16-2031

Quick Links

- Support Process & Policies
- Online Support
- Technical Support
- Support Contracts

Relationships

Related Devices

|                                     | Name        | Type    | Description            | Relationship |
|-------------------------------------|-------------|---------|------------------------|--------------|
| <input checked="" type="checkbox"/> | HMC-ESXi01  | Servers | First ESXi M620 Blade  |              |
| <input checked="" type="checkbox"/> | HMC-ESXi02  | Servers | Second ESXi M620 Blade |              |
| <input checked="" type="checkbox"/> | HMC-vSphere | Servers | New vSphere Server     |              |

- **Device Management**

Document servers, routers, firewalls, and switches. Customers also have custom devices like phone systems, KVM, backup drives, active directory, and UPS systems. Store vital information on these devices. Track information like configuration, running services, IP addressing, switch ports, passwords, hardware information, and applications. For smaller networks you can define the PCs, but you can also set a number of PCs when editing a site. Do document important high powered workstations with custom configurations as well.

(Add Menu → Devices)

Options

General

Relationships
Notes (3)
Config Items (10)
Switch Ports
Changes (5)

General

|                  |                                       |               |                     |
|------------------|---------------------------------------|---------------|---------------------|
| Site             | <a href="#">Main Site</a>             |               |                     |
| Description      | Blade Chassis for Servers and Storage | Device Type   | Blade Chassis       |
| Rack/Cabinet     | <a href="#">Server Rack</a>           | Location      | U23-U26 of Rack 1B  |
| Manufacturer     | Dell Computer Corporation             | Make/Model    | <b>DELL</b>         |
| Tag              | CompanyID002                          | Serial        | 7GQLF22 <b>DELL</b> |
|                  |                                       | Install Date  | 3/1/2015            |
| Warranty Expires | 2/1/2018                              | Purchase Date | 2/1/2015            |

Local Login Account

|          |  |
|----------|--|
| UserName | <a href="#">Click To Display Onscreen</a>  |
| Password | <a href="#">Click To Copy to Clipboard</a> |

Management

|                  |  |
|------------------|--|
| Preferred Access | <a href="#">SSH://192.168.59.212:445</a> |
| Alternative Link | <a href="#">Use the Console Screen</a>   |

Network Interfaces

| IP Address     | IP Network                  | Subnet Mask      | Description                 | Mac Address       | Switch Port                            |
|----------------|-----------------------------|------------------|-----------------------------|-------------------|--|
| 192.168.59.212 | <a href="#">Network LAN</a> | 255.255.255.0/24 | Management IP               | 00:05:06:8A:5F:11 | <a href="#">HP Switch 2 - HP2 - 1</a>  |
| 192.168.59.251 | <a href="#">Network LAN</a> | 255.255.255.0/24 | Network I/O Module (switch) | 00:05:06:8A:5F:12 | <a href="#">HP Switch 2 - HP2 - 24</a> |

General

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Related Accounts

|                                     | Name   | Type           | Description                          | Relationship |
|-------------------------------------|--|----------------|--------------------------------------|--------------|
| <input checked="" type="checkbox"/> |  Dell iDRAC Login | Login Accounts | Account used for all Dell Management |              |


Related Contacts

|                                     | Name   | Type     | Description  | Relationship                        |
|-------------------------------------|--|----------|--------------|-------------------------------------|
| <input checked="" type="checkbox"/> |  James Dowell | IT Staff | Main Contact | Data Center Contact for hard resets |

Related Devices

|                                     | Name   | Type    | Description            | Relationship |
|-------------------------------------|--|---------|------------------------|--------------|
| <input checked="" type="checkbox"/> |  HMC-ESXi01 | Servers | First ESXi M620 Blade  | Blade Slot 0 |
| <input checked="" type="checkbox"/> |  HMC-ESXi02 | Servers | Second ESXi M620 Blade | Blade Slot 1 |

Related Documents

|                                     | Name  | Type      | Description                  | Relationship |
|-------------------------------------|---|-----------|------------------------------|--------------|
| <input checked="" type="checkbox"/> |  Server Room | Site Pics | Pictures of the Rack Cabinet |              |

● General

🔗 Relationships

📝 Notes (3)

🔧 Config Items (10)

Switch Ports

☰ Changes (5)

Switch Port Ranges

| Port Range Name           | Description                               | FPC Number | Slot Number | Starting Port # | Ending Port # |
|---------------------------|---|------------|-------------|-----------------|---------------|
| 8 External Ethernet Ports | Chassis Ports for built in 24 Port Switch | 1          | 0           | 1               | 8             |

8 External Ethernet Ports

| Device       | IP Network  | IP Address     | IP Description              | Port Number |
|--------------|-------------|----------------|-----------------------------|-------------|
| HP Switch 1  | Network LAN | 192.168.59.2   | VLAN 1 Management Interface | 1/0/1       |
| HP Switch 2  | Network LAN | 192.168.59.1   | VLAN 1 Management Interface | 1/0/2       |
| Dell Switch1 | Network LAN | 192.168.59.3   | VLAN 1 Management Interface | 1/0/3       |
| HCM-UNT-R833 | Network LAN | 192.168.58.111 | Backup Interface            | 1/0/4       |
| adserver     | Network LAN | 192.168.59.253 |                             | 1/0/5       |



General

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Notes

Jim Jenkins

5/11/2015

Chassis Hardware (External & Internal)

Front view

Rear view

Jim Jenkins

3/11/2015

Switch Module

R1-2401 VRTX 1Gb Switch Module

Port Legend: Up Down Disabled

External Ports

Internal Ports

Server slot 1

Server slot 2

Server slot 3

Server slot 4

Jim Jenkins

3/5/2015

Storage Overview

Summary

Physical Disks Overview

| State   | Number of Disks |
|---------|-----------------|
| Online  | 15              |
| Ready   | 1               |
| Failed  | 0               |
| Foreign | 0               |
| Blocked | 0               |
| Offline | 0               |

Summary of Disks

Controllers

Physical Disks

Virtual Disks

Global Hotspares

Dedicated Hotspares

2

16

1

1

0

Storage Capacity Reserved for Virtual Disks

Used Capacity: 12.27TB (93%) / 13.09TB

Does not indicate actual storage utilized

● General Relationships Notes (2) **Configuration (5)** Config Items (1) Work History (4) Changes (19)

| Configuration File                 | Date                 | Uploaded By |
|------------------------------------|----------------------|-------------|
| 🔗 2015-02-Backup-Config.bin (22KB) | 9/14/2015 7:24:43 PM | Jim Jenkins |

### Configuration Text [Compare Revisions](#)

Last modified by: Jim Jenkins - 2/12/2015 4:09:04 PM

```
: Saved
: Written by enable_15 at 04:28:19.239 UTC Fri Aug 13 2009
PIX Version 6.3(4)
interface ethernet0 10full
interface ethernet1 100full
nameif ethernet0 outside security0
nameif ethernet1 inside security100
enable password zD3puuZYDzsD3DR encrypted
passwd s0kDuZ0kYpuPJPDOR encrypted
hostname ACMEPix1
domain-name ACME.lan
fixup protocol dns maximum-length 512
fixup protocol 21
fixup protocol h323 h225 1720
fixup protocol h323 ras 1718-1718
fixup protocol http 80
fixup protocol rsh 514
fixup protocol sip 5060
fixup protocol sip udp 5060
fixup protocol skinny 2000
no fixup protocol smtp 25
fixup protocol sqlnet 1521
fixup protocol 69
names
name 172.16.4.133 ACMEServer2
access-list acl_in permit icmp any any
access-list acl_in permit tcp any host 172.16.4.132 eq smtp
access-list acl_in permit tcp any host 172.16.4.132 eq 3389
access-list acl_in permit tcp host apriverldap host 172.16.4.132 eq ldap
access-list acl_in permit tcp any host 172.16.4.132 eq www
access-list acl_in permit tcp any host Server1 eq www
access-list acl_in permit udp any host 172.16.4.132 eq t
access-list acl_in permit tcp any host 172.16.4.130 eq 3389
access-list acl_in permit tcp any host 172.16.4.130 eq smtp
access-list acl_in permit tcp any host 172.16.4.130 eq www
access-list acl_in permit tcp any host 172.16.4.130 eq https
access-list acl_in permit tcp any host 172.16.4.130 eq 3388
access-list acl_nonat permit ip 10.10.0.0 255.255.255.0 172.16.1.0 255.255.255.0
access-list VPNACL permit ip 10.10.0.0 255.255.255.0 172.16.1.0 255.255.255.0
pager lines 24
logging on
logging standby
logging buffered debugging
mtu outside 1500
mtu inside 1500
ip address outside 172.16.4.130 255.255.255.248
ip address inside 10.10.0.254 255.255.255.0
ip audit info action alarm
ip audit attack action alarm
ip local pool ACMETank 172.16.1.1-172.16.1.254
pdm logging informational 100
pdm history enable
arp timeout 14400
global (outside) 1 interface
nat (inside) 0 access-list acl_nonat
nat (inside) 1 0.0.0.0 0.0.0.0 0 0
static (inside,outside) tcp interface smtp 10.10.0.8 smtp netmask 255.255.255.255 0 0
static (inside,outside) tcp interface 3389 10.10.0.4 3389 netmask 255.255.255.255 0 0
static (inside,outside) tcp interface www 10.10.0.8 www netmask 255.255.255.255 0 0
static (inside,outside) tcp interface https 10.10.0.8 https netmask 255.255.255.255 0 0
static (inside,outside) tcp interface 3388 10.10.0.126 3389 netmask 255.255.255.255 0 0
```

- **Documentation**

Save important files, images, and notes about your environment as documents and relate them to devices and other objects. Sample documents include build books, diagrams, check lists, forms, DR documentation, image libraries, policies and procedures regarding your customers. For products you support, save items as KBs.

- (Add Menu → Documents)
- (Add Menu → KBs)

**Site Pics - Server Room**  
Pictures of the Rack Cabinet

Options ▾

Relationships Folders

**Related Devices**

|                                     | Name | Type | Description | Relationship |
|-------------------------------------|------|------|-------------|--------------|
| <input checked="" type="checkbox"/> | Dell |      |             |              |
| <input checked="" type="checkbox"/> | HCM  |      |             |              |
| <input checked="" type="checkbox"/> | hmc  |      |             |              |
| <input checked="" type="checkbox"/> | HP S |      |             |              |
| <input checked="" type="checkbox"/> | HP S |      |             |              |

**SI PORTAL**

Synopsis > Knowledge Base

connectwise

**Knowledge Base Articles**

Filter 100

| Category    | Subcategory | Knowledge Base Article   | Modified By | Modified Date        |
|-------------|-------------|--|-------------|----------------------|
| Integration | ConnectWise | <b>Add New Company</b><br>Process to Add a CW Company that does not exist in the SI Portal                     | Support     | 7/10/2015 4:53:50 PM |
| Integration | ConnectWise | <b>Importing Configurations</b><br>Process to import CW Configurations as Devices into the SI Portal           | Support     | 9/8/2015 11:58:24 AM |
| Integration | ConnectWise | <b>Initial Setup</b><br>Describes how to configure SI Portal to Sync with ConnectWise                          | Support     | 8/14/2015 2:33:53 PM |
| Integration | ConnectWise | <b>Update Existing Portal Company</b><br>Explains how to update an existing Portal company with CW information | Support     | 8/15/2015 8:01:54 AM |

Showing 1 to 4 of 4 entries

First Previous 1 Next Last



32

Command Line Interface...

Q

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Q

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Synopsis > Handover Mgmt Corp > Document List > Document Gallery

Server Room > District Office









- **Accounts**

Document accounts used for credential logins, subscription, and support accounts. When editing a device, you have the option to add a username and password for managing that single device. But, if multiple devices share the same credentials, create an account and link the account to the devices. Some example accounts include service accounts, ad accounts, administrator accounts, registrar logins, and cloud services logins.

(Add/Import Menu → Accounts)

| Accounts                            |                             |   |       |           |  |
|-------------------------------------|-----------------------------|---|-------|-----------|--|
| <input type="text" value="Filter"/> |                             | <input type="button" value="Copy"/> <input type="button" value="Print"/> <input type="button" value="Save"/> <input type="text" value="100"/> |       |           |  |
| AccountType                         | Account                     | Company   | Login | Expires   | Description  |
| AD Logins                           | AD Domain Login             | ACME  | False |           | Login used to support servers and workstations   |
| AD Logins                           | AD Login                    | Yogurt Factory  | True  |           | Active Directory Account   |
| AD Logins                           | AD Login                    | Vista Windows Mfr.  | True  |           | Active Directory Account   |
| AD Logins                           | ITPortalConsultingID        | Handover Mgmt Corp  | True  | 3/31/2015 | Account use by IT Portal Consulting during project deployment                                    |
| AD Logins                           | test                        | ACME  | False |           |  |
| Cloud Services                      | Appraver                    | ACME  | True  |           | Spam Filtering   |
| Login Accounts                      | AD Login3                   | Carter Engineering  | True  | 1/1/2009  | Active Directory Account   |
| Login Accounts                      | Admin Portal                | ACME  | True  |           | Portal for managing website  |
| Login Accounts                      | administrator@vsphere.local | Handover Mgmt Corp  | True  |           | Local account for login to vSphere configuration and if AD is unavailable                        |
| Login Accounts                      | APC                         | Yogurt Factory  | True  |           | Used to register network shutdown  |
| Login Accounts                      | EarthMail                   | Carter Engineering  | True  |           | ISP Email Account Management   |
| Login Accounts                      | EarthMail                   | Yogurt Factory  | True  |           | ISP Email Account Management   |
| Login Accounts                      | ESXi Root                   | Handover Mgmt Corp  | True  | 7/9/2015  | ESXi account used for SSH access   |
| Login Accounts                      | Local Server Admin          | Handover Mgmt Corp  | True  |           | Account used for Local Server Administrator, Active Directory Restore Mode, and the HMC-Template |
| Login Accounts                      | Network Solutions           | Yogurt Factory  | True  |           | Registrar for acny.info  |

- **Configuration Items**

Configuration Items are objects that are typically associated as being an attribute of a device or a physical peripheral attached to a device. Examples provided below.

(Add/Import Menu → Config Items)

| 🔧 1985 Configuration Items |                         |                               |                      |
|----------------------------|-------------------------|-------------------------------|----------------------|
| 📁 28 Active Directory      | 📁 249 Application       | 🔧 19 Backup                   | 📁 2 Backup Folder    |
| 🔧 3 Circuit ID             | 💿 2 Cluster             | 🔧 7 Configuration             | 💿 209 Database       |
| 🔧 5 Database Connection    | 📁 1 Desktop Application | 📁 7 DHCP                      | 💿 58 Disk            |
| 💿 3 Disk Enclosure         | 🔧 1 Distribution Group  | 💿 4 DNS Name                  | 🔧 22 Driver          |
| 📁 2 Email                  | 💿 37 ExchangeDB         | 💿 4 Ext-Drive                 | 🔧 7 FTPsite          |
| 🔧 23 Group Policy          | 🔧 2 Host File           | 💿 1 LeftHand Management Group | 💿 135 LUN            |
| 📁 8 Mapped Drive           | 📁 2 Monitor             | 🔧 21 Port                     | 📁 112 Scheduled Task |
| 🔧 24 Script                | 📁 310 Service           | 🔧 461 Shared Folder           | 📁 2 SharePoint       |
| 📁 5 Software               | 💿 8 SQL Instance        | 🔧 12 SSID                     | 🔧 4 SSL Certificate  |
| 🔧 1 vCenter                | 🌐 161 Website           | 🔧 3 Wireless Key              |                      |