

IT Portal

IT PORTAL ONBOARDING GUIDE

IT Portal 3.0 | support@it-portal.com

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](#)

< Synopsis > Handover Mgmt Corp

Q

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
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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)

The screenshot shows a 'Network LAN' configuration page. At the top, it displays 'Core VLAN for infrastructure.' Below this, there are several key-value pairs for network configuration:

- Network: 192.168.59.0
- Subnet Size: 255.255.255.0/24
- DHCP Server: hmc-ASA01 - 172.16.0.27
- Default Gateway: hmc-ASA01 - 172.16.0.27
- VLAN ID: 1
- Total IPs: 256
- Usable IPs: 254
- DNS Server 1: hmc-ad02 - 192.168.59.232
- DNS Server 2: hmc-ad02 - 192.168.59.232

Below the configuration is a section titled 'Devices in IP Network' which contains a table with the following columns: DeviceType, Device, Site, Description, Make, and Model.

DeviceType	Device	Site	Description	Make	Model
Backup Devices	HCM-UNT-R833	Main Site	New Unitrends Appliance	Unitrends	Recovery-833
Blade Chassis	Dell-VRTX	Main Site	Blade Chassis for Servers and Storage	Dell Computer Corporation	OptiPlex GX1 450MTbr
Blade Chassis	Dell-VRTX	Main Site	Blade Chassis for Servers and Storage	Dell Computer Corporation	OptiPlex GX1 450MTbr
Servers	exchange-server	Main Site	Exchange 2003 Server	Dell Inc.	PowerEdge 1900
Servers	acct-server	Main Site	Accounting Server	Dell Inc.	PowerEdge 2900
Servers	adp-server	Main Site	Payroll Server	Dell Inc.	PowerEdge 1900
Servers	citrix-server	Main Site	Old Citrix Metaframe Server	Dell Inc.	PowerEdge 1900
Servers	ad-server2008	Main Site	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)

Blade Chassis - Dell-VRTX Options ▾

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

General

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

Local Login Account

UserName	Click To Display Onscreen
Password	Click To Copy to Clipboard

Management

Preferred Access	SSH://192.168.59.212:445
Alternative Link	Use the Console Screen

Network Interfaces

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

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

Notes

Jim Jenkins 5/11/2015 Chassis Hardware (External & Internal)

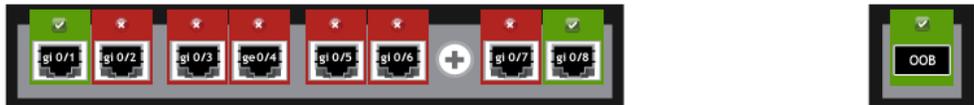


Jim Jenkins 3/11/2015 Switch Module

R1-2401 VRTX 1Gb Switch Module

Port Legend: Up Down Disabled

External Ports



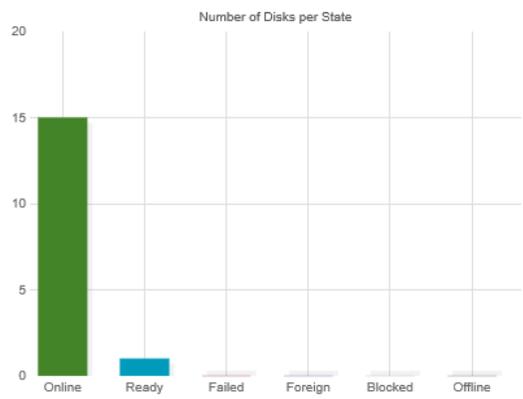
Internal Ports



Jim Jenkins 3/5/2015 Storage Overview

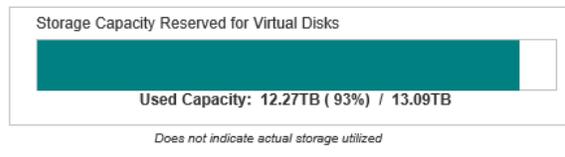
Summary

Physical Disks Overview



Summary of Disks

Controllers	2
Physical Disks	16
Virtual Disks	1
Global Hotspares	1
Dedicated Hotspares	0



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 zJ03puuZYDzsD3DR encrypted
passwd s0kDuZ0kYpuPJpDR 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
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)

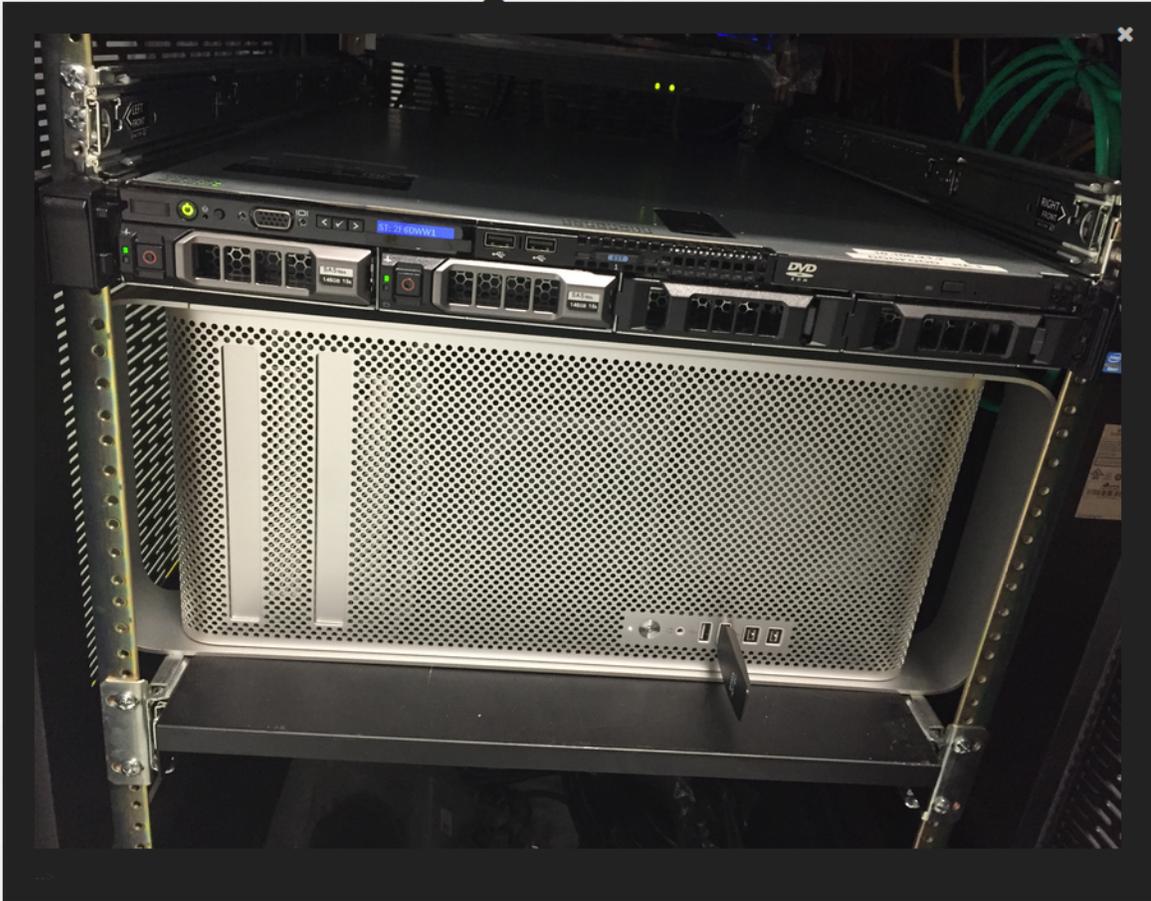
The screenshot displays the SI PORTAL interface. At the top, there's a header for 'Site Pics - Server Room' with an 'Options' dropdown. Below this, there are tabs for 'Relationships' and 'Folders'. A 'Related Devices' table is visible, listing various devices. Overlaid on this is a 'Knowledge Base' window with a search bar containing 'connectwise'. The KB window shows a list of articles under the 'Integration' category and 'ConnectWise' subcategory. The articles are:

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

The KB window also includes a search filter, a page size dropdown set to 100, and pagination controls at the bottom showing 'Showing 1 to 4 of 4 entries' and buttons for 'First', 'Previous', '1', 'Next', and 'Last'.



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	