



Email: support@simplybetterit.co.uk

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Simply Better IT

Onboarding Questionnaire

The aim of this onboarding process is to assess the scope of support required, determine responsibilities, and set expectations on both sides. This will begin the process of collecting the information needed about the IT setup and infrastructure to be supported, and who within the business is responsible to progressing.

- Auditing the infrastructure
- Assessing what needs to be supported
- Windows & 3rd Party patching, anti-virus and anti-malware infrastructure
- Approach towards documentation of IT infrastructure
- Data storage, backup and access
- Policies for Windows devices like encryption and admin rights
- Password Management – policy on complexity, training for staff
- Network infrastructure
- Cyber Essentials via CyberSmart
- Telephony Services
- Domain Name management
- Email arrangements
- Website Hosting
- Profile scanning with ID Agent for Domain
- Ticketing for helpdesk support and out of hours

Auditing the infrastructure

Recommended approach: install a Remote Monitoring agent to audit hardware and software installed on each PC or Laptop in scope. The time taken to audit and report will be chargeable (approximately 1 hour per device). User info, printers and other equipment requiring auditing for scope will be charged additionally.	Agreed? Yes or No
Responsible business contact and/or suggested alternative:	



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Assessing what needs to be supported

<p>The scope of hardware requiring support needs to be outlined, as does the people side of liaison, preferred lines of communication and decision-making authority. Need to determine an all you can eat Managed Service or other offering. Staff structure and outline of this can be developed on an hourly chargeable basis, recouped by 50% clawback over first 3 months of a Managed Service contract.</p>	<p>Agreed?</p> <p>Yes or No</p>
<p>Responsible business contact and/or suggested alternative:</p>	

Windows & 3rd Party patching, anti-virus and anti-malware infrastructure

<p>Determine the current approach towards Microsoft & 3rd Party application patching, application version management, and requirements for anti-virus and anti-malware. What approach is currently taken and required for training on IT security regarding malicious email activity like phishing emails. This can be developed on an hourly chargeable basis.</p>	<p>Agreed?</p> <p>Yes or No</p>
<p>Details below:</p> <p>Confirm what approach is to be taken to configuring the Heimdal Policies for the customer – rely on Simply Better IT and discuss amendments as situations arise? By default the Modules installed are DarkLayerGuard, VectoreN, ThirdPartyApps and Antivirus – that ok?</p>	

Approach towards documentation of IT infrastructure

<p>How the IT infrastructure is currently documented and information stored and updated needs to be clarified, including the boundaries and responsibilities of different elements. For example, if broadband exits, who has the account details, who has the login passwords for software subscriptions, email etc. This can be developed on an hourly chargeable basis. Proposal going forward it to centralise all documentation in IT Glue, with client access.</p>	<p>Agreed?</p> <p>Yes or No</p>
<p>Details below:</p>	



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Data storage, backup and access

Need to capture how organisation and personal data is stored across all devices and users. Where data is centralised, what are the current and preferred future access rights to that data? How is this data backed up and how should the data storage be managed in future, including backup and disaster recovery options. This can be developed on an hourly chargeable basis.	Agreed? Yes or No
If alternative suggested, please outline here:	

Policies for Windows devices like encryption and admin rights

Windows devices can have policies centrally and remotely managed, so clarity required on what approach is currently taken and what approach should be taken when supported by Simply Better IT. Things like encryption of devices can cause problems if hardware changed without the encryption key being available. Some businesses may not want users to have local admin rights to the devices so need to assess current and determine future approach. If Office 365 is used then devices could be joined to Azure Active Directory – should they? This can be developed on an hourly chargeable basis.	Agreed? Yes or No
If alternative suggested, please outline here:	

Password Management – policy on complexity, training for staff

Beyond login details for devices, a great deal of modern work requires login to websites for various services. As these logins can be compromised and misused, what is the current approach towards managing these login details and what should the approach be going forward, including	Agreed? Yes or No
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<p>centralisation of those details. What training should be in hand to ensure the approach is consistent and checked with testing and training. Should IT glue be used for password management? What is the current and future approach towards Multi-Factor Authentication? This can be developed on an hourly chargeable basis.</p>	
<p>If alternative suggested, please outline here:</p>	

Network infrastructure

<p>All network infrastructure needs to be assessed for what it is and determine plans for future improvements. This will include configuration aspects of internet connections (also redundant connections), firewalls, network switches, arrangements for IP telephony. This can be developed on an hourly chargeable basis.</p>	<p>Agreed? Yes or No</p>
<p>If alternative suggested, please outline here:</p>	

Cyber Essentials via CyberSmart

<p>As an ongoing mark of the basics of network security being in place, the government have introduced a Cyber Essentials accreditation. This is a requirement for businesses doing work with some government agencies already and will increasingly be a requirement to work for the likes of the NHS and local councils. It is recommended that Cyber Essentials accreditation is strived for through the CyberSmart tool. This can be developed on certification fee and ongoing hourly chargeable basis.</p>	<p>Agreed? Yes or No</p>
<p>If alternative suggested, please outline here:</p>	



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Telephony Services

Assessment of existing arrangements for telephony services, be that using PSTN, ISDN or IP based phone services is needed. This may involve 3 rd Party suppliers, though as they likely utilise some other IT infrastructure configuration info and responsibilities need to be defined and documented. It is recommended to move to fully hosted IP telephony services if not already used. This can be developed on an hourly chargeable basis.	Agreed? Yes or No
If alternative suggested, please outline here:	

Domain Name management

As control of Domain Names is very important for managing the services used around the Domain Name, clarification of ownership and management is required. What is and should be the approach going forward, minimising the risk of impersonation? This can be developed on an hourly chargeable basis.	Agreed? Yes or No
If alternative suggested, please outline here:	

Email arrangements

What are current Email arrangements - Office 365, IMAP, POP3, Domain based of the likes of Gmail or Outlook.com? How should these be improved and managed going forward, which probably needs to be in line with organisation structures and marketing plans. Recommendation is for Office 365 for a fuller collaborative and messaging experience. Given the importance of Email, is 3 rd party scanning required for AI based spam / impersonation scanning, backup and retention for legal reasons. Office 365 managed via Giacom and 3 rd party backup via Barracuda? What Email naming policy exists, or should be adopted? This can be developed on an hourly chargeable basis.	Agreed? Yes or No
If alternative suggested, please outline here:	



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Website Hosting

As promotion of services and reputation is presented online via company websites is increasingly important for businesses, so the management of websites increases in importance. The current and future arrangements need to be determined. Recommendation is that if no solid arrangements are in place, WordPress is used for presenting and maintaining a website presence. Hosting with 34sp can be arranged and managed on rental basis and development of website offered as a service on an ad-hoc basis.	Agreed? Yes or No
Details below:	

Profile scanning with ID Agent for Domain

As more elements of IT infrastructure are tightened, attacks on businesses via impersonation emails is rapidly rising in effectiveness. Compromised credentials from hacked services are usually made available on the dark web. It's recommended that credentials of staff and business owner details are scanned for on the Dark Web to alert to compromised info being more widely available. This ID Agent scan provides daily reports or can be one-off scans.	Agreed? Yes or No
Details below:	

Ticketing for helpdesk support and out of hours

The process of providing IT support can be done through telephone support, email or chat support, and onsite support initiated via a ticketing system. The scope of support and arrangements for call out needs to be determined and formalised. Out of hours support can be provided will access to a 3 rd party helpdesk that can also be first contact point.	Agreed? Yes or No
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