

# On-boarding Document



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## About



### **Purpose and Benefits of Technology Audit**

The aim of this document is to help us understand your current situation, identify your needs and challenges, and propose the best solutions for you.



### **Completing the Document**

To do this, we have prepared a document that contains a series of questions related to your technology infrastructure, systems, and security.



### **Additional Information**

If you have any additional documents or information that you think are relevant for the technology audit, please feel free to send them over along with the document. We will review them and incorporate them into our analysis.

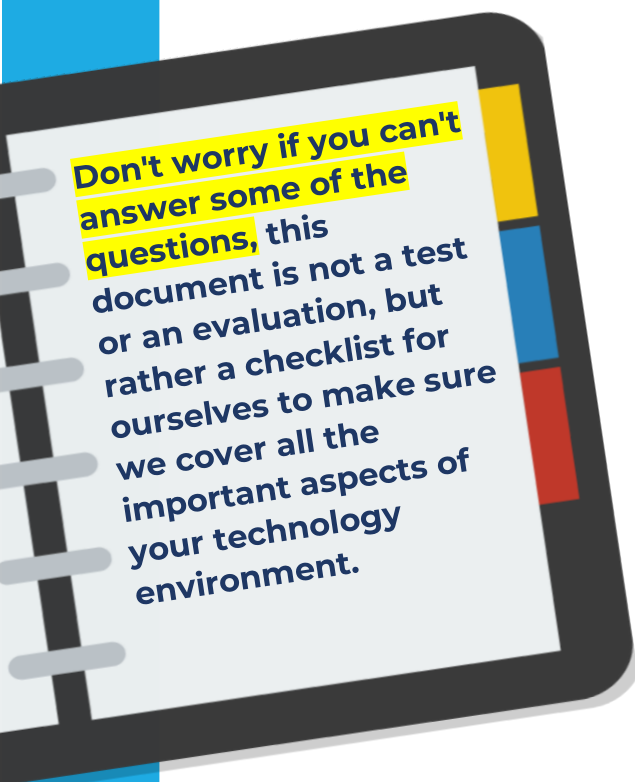


### **Contact**

We appreciate your cooperation and trust in us. If you have any questions or concerns, please do not hesitate to contact us.

We look forward to hearing from you soon.

[helpdesk@dunedinit.co.uk](mailto:helpdesk@dunedinit.co.uk) - 0330 058 1701



## General Questions

### 1. Access and Credentials:

Can you provide a comprehensive list of all usernames, passwords and access credentials for systems, applications, cloud portals and services currently used by the business.

Are there any privileged accounts or administrative access credentials that need to be transferred.

### 2. Documentation:

Do you have up-to-date documentation or an inventory of the IT infrastructure, including hardware, software, and network configurations.

Can you provide details about network topology, IP addresses, and domain configurations that the current IT Provider provides support for.

What pain points or challenges are you currently facing with your current IT support and systems.

### 3. Service Contracts and Agreements:

Are there any existing service contracts, agreements, or licenses related to software, hardware, or services that we need to be aware of during the transition.

### 4. Supplier Contacts and Relationships:

Can you share contact information for key vendors and suppliers the client has relationships with (E.g. Software providers, hardware manufacturers).

### 5. Security and Compliance:

Can you ask current IT provider to describe how they manage your business data security and what security software is in place to provide end point device protection.

Are there any specific security requirements or compliance regulations that your business needs to adhere to.

### 6. System Monitoring and Alerts:

Are there any monitoring tools or systems in place to track the health and performance of the IT environment.

How are alerts and notifications managed for potential issues or incidents.

### 7. Scalability and Growth:

We understand that your business will grow in the near future. If so, do you have any plans to scale your IT infrastructure.

### 8. User Needs and Preferences:

Are there any specific software applications or tools that the business relies on.

### 9. Disaster Recovery and Backup:

What is your current disaster recovery plan and how often is it tested.

Do you have a backup strategy in place for critical data.

**10. Communication and Support:**

Would your business have a preference to communicate with Dunedin IT Helpdesk (E.g. Email, phone) allowing staff to directly raise helpdesk tickets or do you wish to internally filter the tickets via a nominated member of staff before contacting Dunedin IT.

What are your expectations regarding response times for support requests. We will need to discuss SLA in further detail.

**11. Domain Ownership and Registration:**

Can you confirm ownership and where the business Domain/s is currently registered/hosted. Can you organise access to the domain registrar account for Dunedin IT. Does the business have any other domains in operation.

**12. Website Hosting:**

Can you confirm if your website is hosted along with the domain. Is your current Web Developer responsible for maintaining and securing your Web Site.

**13. Email Hosting:**

Can you please ask current IT provider to give Dunedin IT access to the business Office 365 tenancy and any services associated with your business.

**14. DNS Management:**

Can you please confirm if your current IT provider manages your DNS settings, or do you prefer to manage them yourself.

**15. Transfer and Migration:**

If we were to find that your current domain hosting provider is “not fit for purpose” or we have concerns around security, would you object to transferring it to a different domain registrar or hosting provider.

**16. Security and Privacy:**

Do you have any security requirements for your domain, such as SSL certificates for secure connections.

**17. Renewal and Billing:**

Can you confirm how long your current domain is registered for and when it is due for renewal. We will also confirm this service for you.

**18. Domain Management Access:**

Internally within the business who will be responsible for managing the domain and making updates to its settings or will this be wholly managed by Dunedin IT.

**19. Supplier Relationships:**

Are you currently working with any other IT vendors or service providers that may have an impact on our support or product services.

**20. Transition and Onboarding:**

Can you confirm your preferred timeline for transitioning to Dunedin IT services. We will provide you with an onboarding plan once confirmation and agreed transfer of services from current IT provider.

Are there any specific concerns or requirements you have for the onboarding process.

# Technology

## Internet & Web Services

### Service Provider

Please list all Internet Services Providers

Vendor	Account Number	Primary Contact	Agreement Expiry

Please list all credentials for accounts used to access the web portal of the ISP?

Vendor	Portal URL	Username	Password

Please list credentials for the WAN connections programmed on the router/s?

Vendor	Static IP	Username	Password

Notes



## Backup internet provider

Please list all Backup Internet Services Providers

Vendor	Account Number	Primary Contact	Agreement Expiry

Please list all credentials for accounts used to access the web portal of the ISP?

Vendor	Portal URL	Username	Password

Please list credentials for the WAN connections programmed on the router/s?

Vendor	Static IP	Username	Password

Notes

## Website Hosting

Please list all websites

Hosting Vendor			
Primary Domain Name			
cPanel Username			
cPanel Password			
cPanel URL			
WordPress Username			
WordPress Password			
WordPress Admin URL			

Notes (Web Designer Details, SEO Supplier Details etc)

## Domain Management

Please list all domain names along with registrar details.

Domain Name	Registrar	Registrar Admin URL	Admin Username	Admin Password

Notes

## Telephone

### VoIP / Phone System

Please list all VOIP / Hosted PABX & Phone Systems

Manufacturer / Model	Serial Number	Location	Admin URL	Admin Username	Admin Password

Notes (Call Routing, Customized Items, Extension List etc)

### Telephony Vendor

Please list all Telephony vendors (including Desk Phones & Mobiles etc)

Vendor	Account Number	Primary Contact	Support Phone	Purpose?

Notes (Specific Configurations etc)

## Mobile phone solution

Please list all Telephony vendors (including Desk Phones & Mobiles etc)

Vendor	Account Number	Primary Contact	Support Phone	Purpose?

Notes (Specific Configurations etc)

### Device Management for Mobiles

Please list device management used for mobile devices (Android, Apple phones and tablets)

Vendor	Account Number	Primary Contact	Support Phone	Purpose?

Notes

## Print Management

Please list how Printers, Network Scanners and MFC Units

Manufacturer / Model	Serial Number	Location	Admin URL	Admin Username	Admin Password

Notes (Supplier Contracts, Agreement Terms etc)

## Remote Access VPN

Please list all VPN's & Remote Access Details

Type (User / Point to Point etc)	Public IP Address	Firewall / Router Name	Passphrase	Purpose?

Notes

# Wireless Networks

Please list all Wireless Access Point (including at remote sites)

Manufacturer / Model	Serial Number	Location	Admin URL	Admin Username	Admin Password

Please list all Wireless Networks in use (including at remote sites)

IP Address	SSID	Passphrase / Key	Purpose?

[illegible]

## Network & Devices

### Routers / Firewalls

Please list all Routers & Firewalls (including at remote sites)

Manufacturer / Model	Serial Number	Location	Admin URL	Admin Username	Admin Password

Additional Notes

### Switches

Please list all switches (including at remote sites)

Manufacturer / Model	Serial Number	Location	Admin URL	Admin Username	Admin Password

Notes

### NAS & SAN

Please list all Network Attached Storage and Storage Area Networks

Manufacturer / Model	Serial Number	Location	Warranty Expiry	Server Name	Purpose

Notes (Supplier Contracts, Warranty / Care Pack Details etc)

### Uninterruptable Power Supplies

Please list all Uninterruptable Power Supplies and their details

Manufacturer / Model	Serial Number	Location	IP Address: Port	Username	Password

Notes (Devices Protected, Admin Software Locations, Additional Warranties etc)



## Security Packages Used

Please list all Anti-Virus, Anti-Malware, Anti-Spam and Spyware Protection Software.

Vendor	Account Number	Admin URL: Port	Admin Username	Admin Password

### Notes (License Details, Unique Configuration Details, Removal Details etc)

## Backup and Recovery

### On-site backups

Please list all On-Site Backup Solutions in use

Vendor	Admin URL	Admin Username	Admin Password	Admin Username	Purpose

Notes (Backup Schedules, Rotation Details, Retention Details etc)

### Cloud / Off-site Backups

Please list all Cloud / Off-Site Backup solutions in use.

Vendor	Admin URL	Admin Username	Admin Password	Purpose?

Notes (Backup Schedules, Rotation Details, Retention Details etc)

## Remote Management

Please list any remote management software used.

Vendor	Account Number	Primary Contact	Support Phone	Purpose?

Notes

## Helpdesks Software

Please list any helpdesk software used.

Vendor	Account Number	Primary Contact	Support Phone	Purpose?

Notes

## Email Setup

Please list the Email Provider/s

Vendor	Control Panel / Portal / Admin URL	Admin Username	Admin Password

[illegible]

## Servers

### Physical Servers

Please list all Physical Servers (including in Data-Centres)

Manufacturer / Model	Serial Number	Location	Warranty Expiry	Server Name	Purpose

Notes (Supplier Contacts, Warranty / Care Pack Details etc)

### Virtualization Hosts

Please list all Virtual Hosts (e.g. VMWare / Hyper-V etc)

Type (e.g. VMWare / Hyper-V)	Admin URL: Port	Admin Username	Admin Password

Notes (Configurations /Failovers etc)

## Credentials

### Domain Administrator Credentials

Please list all Domain Administrator Credentials

Domain Name (i.e. COMPANY.LOCAL)	Username	Password

### Local Admin Details

Please provide any Local Admin Credentials (for Servers & Computers). If there are standard Local Admin Credentials across ALL desktops, please list this here.

Device Name	Local Admin Username	Local Admin Password	Purpose?

### SQL Credentials

Please list all SQL Server / SA Credentials

Server Name	Username	Password

### Software

#### Cloud / SaaS Vendors

Please list all Cloud & SaaS Vendors (including any G-Suite / Office365).

Vendor	Account Number	Admin URL:Port	Admin Username	Admin Password
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### Applications / Lob Vendors

Please list all Application / Line of Business (LOB) Vendors being used.

Software Name	Vendor	Vendor Contact	Support Number	Purpose?

### Notes (License Details, Account Managers etc)


### Computers

#### Inventory

Please list all Computers & Laptops. Attached a separate list of needed.

Manufacturer / Model	Serial Number	Location	Warranty Expiry	Primary User	Device Name





## Additional Notes

Are there any other items which we may need to be aware of to aid in a speedy, safe and smooth transition for the client and their team?

[illegible]

## Notes continued...