

Welcome Packet

Our group welcomes you to TAG's IT Service Group as a valued customer! We look forward to providing you with quality IT Services. This packet will provide you with answers to many of your questions as you start using our program.

Key Information:

Customer Care:	Our Customer Care Center is available from 7:00am to 5:00pm EST, Monday through Friday except major holidays. These are our operating hours if you have customer service questions.
How to Open a Support Request Ticket:	For IT Services Support, the best way to get a hold of us is by creating a support request in our automated system. To do so, email us your support request at support@tagnational.com. You can also phone our Customer Care Center during business hours at 858-946-2100.
Recognized Holidays:	It is standard for TAG to recognize the following holidays. New Year's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving (2 days) and Christmas (2 days). Our office will be closed on these days and our IT Services Group will operate in after-hours mode.
24/7 Programs:	We monitor critical servers 24/7 and will remediate issues in a manner that is consistent with the client's expected up time.
After Hours Requests:	Most other requests will be handled during our Customer Care Center Hours as listed above. If you have a request that cannot wait, <u>please make sure your email indicates that you would like an emergency response</u> , otherwise we will assume that you intend for us to work on your request on the next business day.
Sales and Consultation:	As your need for technology changes, we hope you'll consider us as your advisor for your technology needs. Your IT Sales Consultant's name is: _____ My Phone Number is: _____
Billing Questions:	If you have billing questions, the best way to have them addressed is to email your question to billing@tagnational.com .
Manager:	Your satisfaction is important to us. With this in mind, you should know that you can call us if you are ever questioning the quality of our service. Please call me if I can ever be of assistance: [Name and Phone] .

IT Service Support Requests:



itsupport@tagnational.com

First Steps:

As a new customer, we want to hit the ground running and make a great first impression. With this in mind, we'd like to request some information from you that will allow us to serve you better.

Passwords: An accurate password list is critical in order to maintain the continuity of your systems. We would like to help collect and maintain this list with you. Please consider these potential accounts so we can determine which ones you have.

- Windows Active Directory Domain Administrator
- Firewall Administration Passwords for Switches, Routers and Wireless Access Points
- Any Site Applications with Administrative Credentials
- Turnkey devices such as web content filters, spam filters and backup archivers'
- Backup Software
- Database Server Administrative Credentials
- Domain Name Registrar and Certificate Authority
- Phone System Administrative Credentials
- VPN Concentrator Administrative Credentials
- Email System Centralized Administrative Credentials

Key Contact Information: From time-to-time we will need to talk to you after-hours. Perhaps we've detected a power outage or that your email is not working. Let us know who the decision maker is for this capacity. Usually, its best to have info for someone that can authorize expenditures in the event a part must be purchased.

User and Computers: We'll need to take an inventory of who works for you and the devices they have. Sometimes it's best to start with your Corporate Phone Extension List. From there we can create the rest!

Wide Area Network Diagram: When we troubleshoot Telecom problems, we'll need to know how your Network was designed. If someone created a Wide Area Network Diagram for you in the past, this would be good for us to have!

Weak Points: If you're having problems, we'd like to create a punch-list so we can start to address these things. Let us know which system issues your having so we can address them.

Anti-virus If we're deploying our Anti-virus program, we'll get started with the removal of your existing programs and start deploying our centrally managed software.

Backups We want to get a handle on your backups. We'd like to spend some time reviewing this with you so we can help maintain that they are happening correctly and on schedule.

Monitoring: We'll be deploying our monitoring software on your system so we can be notified when you have issues like virus's, low disk space or problematic services. This service will give us key metrics that will help you make decisions about your technology investment.

Assessing Your Needs:

We can help you determine which IT functions we should focus on by completing this checklist.

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| ☐ Network Infrastructure | Do you have problems with the speed and or reliability of your local area network?
Do you have devices that should be connected but are not because of a lack of ports? |
| ☐ Network Infrastructure | Is your wireless network slow or do you have concerns about the security of your wireless network? Are there dead-spots? |
| ☐ Network Infrastructure | Are you planning an expansion that will require a change to your network infrastructure? |
| ☐ Network Infrastructure | Is your firewall sufficient for your business and security needs? |
| ☐ Network Infrastructure | Do you have problems with your VPN solution? |
| ☐ Network Infrastructure | Do you have any other Internet bandwidth related issues such as Internet latency, site-to-site connectivity problems or up time issues? |
| ☐ Host Servers | Do you have servers that are inefficient for the tasks you require or failing frequently? |
| ☐ Host Servers | Do you find yourself buying servers frequently or low on disk space? |
| ☐ Desktops & Applications | Do you have any end-user operating systems older than Windows 7? |
| ☐ Desktops & Applications | If running Microsoft Office, do you have Microsoft Office versions older than Office 2010? Do you have a variety of different versions of Office? |
| ☐ Desktops & Applications | What would you say the previous response time is for general user related issues? Is this sufficient? |
| ☐ Desktops & Applications | Has your business lost user data due to a problem with a server, desktop or laptop? |
| ☐ Desktops & Applications | Do you struggle to track licensing, or are you slow to rebuild computers or come up with a replacement when a user is without a computer? |
| ☐ Desktops & Applications | Do you have a hard time finding documents, records and other important information when you need it? |
| ☐ Business Continuity & Compliance | Are you confident that you are backing up all important data to an off-site location nightly? Are you confident in your plan to restore critical business systems within your Recovery Time Objective? |
| ☐ Business Continuity & Compliance | Are you archiving email to a centralized system that allows you to preserve and restore important emails without a complete restore of your email database? |

Assessing Your Needs (Page 2):

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| ☐ Business Continuity & Compliance | Are you confident that you are able to restore your line-of-business database to specific point-in-time? |
| ☐ Business Continuity & Compliance | Do you use a single virus protection solution that can be managed and deployed centrally to all computers? Is your anti-virus out of date? Do you have issues with malware? |
| ☐ Business Continuity & Compliance | Are you in need of a web content filter in order to keep people productive and avoid human resource issues? |
| ☐ Business Continuity & Compliance | Are your servers and network systems in a secure, temperature-controlled location? |
| ☐ Business Continuity & Compliance | Does your computer room have an uninterruptable power source, such as UPS equipment, that is sufficient to maintain power for all equipment in the room for at least one hour in the event of a blackout to the facility and to protect equipment in the event of a brownout? |
| ☐ Business Continuity & Compliance | Does your company maintain written policies for internet usage, corporate email policy and IT security that employees must sign? |
| ☐ Telecommunications & Messaging | Are you running an internal Exchange email server with software older than Exchange 2010? Are you satisfied with your email solution? Are you able to keep or archive all of the received and sent email that you need? |
| ☐ Telecommunications & Messaging | Is your company able to limit email spam effectively? |
| ☐ Telecommunications & Messaging | Does your company's corporate web and/or mobile email work sufficiently? |
| ☐ Web Hosting & Application Development | Are you happy with your company's web site and/or applications? Are they out of date and need to be updated? |
| ☐ Web Hosting & Application Development | Are you able to maintain and modify your internal reports and create new line-of-business reports when required? |
| ☐ Hosting & Professional Services | Do you utilize an outsourced data center for disaster recovery and/or business continuity or other services? |
| ☐ Connected Devices | Do you have printing requirements such and color or quality issues that need to be addressed? |
| ☐ Connected Devices | Do you have volume scanning requirements that are not efficient, too expensive or unproductive? |

Other TAG Solutions:

Did you know we can provide all these solutions as well? Any of our employees can help you line up the right resource if you need additional information.

Information Technology	
☐	Network Switched Topologies
☐	Wireless Networks & Mobility Solutions
☐	Security Firewalls & Virtual Private Networks
☐	Servers & Storage Platforms
☐	Windows Server Deployments
☐	Power/UPS Solutions and Rack Systems
☐	Virtual Server Platforms & VDI
☐	Data Protection & Disaster Recovery
☐	Web Filtering Solutions
☐	Virus Protection
☐	Spam Filtering
☐	eMail Archival
☐	Desktops & Applications
☐	SQL Server Databases
☐	eMail Server Solutions
Content Management	
☐	Document Management Solutions
☐	Document Scanners
☐	Forms Processing and OCR Solutions
☐	CD/DVD Duplication Systems
☐	Large Format Scanners
☐	Document Workflow Solutions
☐	Document Capture & Routing

Document Printing Solutions	
☐	Black & White Printers/Copiers
☐	Color Printers/Copiers
☐	Multi-function Devices and Facsimile
☐	Wide Format Printing
☐	Production Printing
☐	Document Shredders
☐	Facilities Management
☐	Managed Print Services
☐	Mail Center Services
☐	Document Scanning Service Bureau
☐	Production Printing Software
☐	Print Accounting Software
Dictation & Transcription	
☐	Digital Dictation Solutions
☐	Voice Recognition Solutions
☐	Mobile Dictation
☐	Medical Transcription
☐	Legal Dictation
☐	Outsourced Transcription
Telecommunication & Unified Communications	
☐	Voice & Data Circuits
☐	VoIP Solutions
☐	Unified Messaging