



**TECHNOLOGY THAT
GROWS WITH YOU**

ONBOARDING PACK



INTRODUCTION

George here, I'm with **ABM Integrated Solutions**, and as you probably know, we're ramping up to support the IT needs of **Enaimco**.

During the assessment process, we will be respectful of your time and appreciate your assistance.

We know as much as you do that it's never a fun time to end a relationship with an existing IT service provider. However, it's a natural part of doing business, and we work hard to ensure that our prospective clients are well taken care of throughout the transition, regardless of which side we are on. Please see the next section, "Managing Your Existing Provider," for tips on how to navigate the transition.

To help us kick things off, please send us all the information you have on the items included in the following pages. While you may not have information on everything, we would appreciate as much as possible to ensure an accurate estimate and ultimately a smooth onboarding. Please attach separate lists where there isn't enough space.

If you need to get in touch with me at all for any reason, please don't hesitate to call me at **647-280-3705** or shoot me an email at gcolwell@abmis.ca.

All the best, and thank you for considering ABM as your new Managed Service Partner and for your assistance throughout this process.

Regards,

A handwritten signature in blue ink, appearing to read 'G. Colwell'.

George Colwell

Email: gcolwell@abmis.ca

Phone: **647-280-3705**



MANAGING YOUR EXISTING PROVIDER

Not all MSPs are the same. ABM believes that your business is your business. This means we never hold a client hostage. We welcome open and candid discussions about how we can consistently improve our service and offerings to help your business grow. We also understand that there are instances when the right decision for your business might be to move your managed services to another provider. This, unfortunately, is not the case across the whole industry.

If you believe that there may be issues as you exit a relationship with your current provider, ABM suggests the following:

1. Review your existing contract and understand your rights and obligations related to the termination of your agreement.
 - a. We can help by reviewing this with you and creating an exit strategy and time line.
2. Be prepared to pay your current service provider during the transition. This can mean a couple of months of additional cost but will reduce the number of issues during the transition.
3. If required, we can provide a different format of this questionnaire for your existing provider where we:
 - a. Remove the front cover
 - b. Remove the introduction
 - c. Remove all branding

Then, you send this unbranded document to your existing IT provider directly and explain that you are updating your cyber insurance and that the insurer has asked you to gather this information.

- d. Be ready to pay an additional fee for the completion of this document from your current provider.

In any event we are happy to lead the transition for you and deal with your existing provider however you see fit.



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GENERAL ITEMS

SERVICE REQUESTS

- Not Available/Not Applicable
- Please attach the most recent 12 months of Service Requests / Support Tickets, including all Notes and Resolutions
- Please attach a list of all open Service Requests / Support Tickets that are currently **Outstanding** or **In Progress**, including any existing notes
- Please attach a list of all Recurring Tasks required to manage the Systems / Network

BUSINESS CONTINUITY & DISASTER RECOVERY PLANS

- Not Available/Not Applicable
- Please attach the Business Continuity & Disaster Recovery Plans

COMPANY POLICIES

- Not Available/Not Applicable
- Please attach any Policies (including BYOD / Mobile Device / Computer / Internet & Privacy Policies)

WARRANTIES / CARE-PACKS

- Not Available/Not Applicable
- Please attach any Warranty / Care-Pack information across all devices

NETWORK DIAGRAMS

- Not Available/Not Applicable
- Please attach the Network Diagrams

USER MANUALS

- Not Available/Not Applicable
- Please attach any User Manuals

LICENSES

- Not Available/Not Applicable
- Please attach any License Certificates



NETWORKING & DEVICES

ROUTERS / FIREWALLS

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

Not Available/Not Applicable

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

Additional Notes

NETWORK SWITCHES

Please list all switches (including at remote sites)

Not Available/Not Applicable

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

Notes



VPN / REMOTE ACCESS

Please list all VPN's & Remote Access Details

Not Available/Not Applicable

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

Notes

PRINTING & SCANNING

Please list how Printers, Network Scanners and MFC Units

Not Available/Not Applicable

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

Notes (Supplier Contracts, Agreement Terms etc)



NAS & SAN

Please list all Network Attached Storage and Storage Area Networks

Not Available/Not Applicable

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

Not Available/Not Applicable

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

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



INTERNET & WEB SERVICES

INTERNET SERVICE PROVIDER

Please list all Internet Services Providers

Not Available/Not Applicable

Vendor	Account Number	Primary Contact	Agreement Expiry

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

Not Available/Not Applicable

Vendor	Portal URL	Username	Password

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

Not Available/Not Applicable

Vendor	Static IP	Username	Password

Notes



WEB SITES & HOSTING

Please list all websites

Not Available/Not Applicable

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)

SSL CERTIFICATES

Please list all SSL Certificates

Not Available/Not Applicable

Issuer	Certificate URL	Wildcard?	Expiry Date	Purpose?

Notes



DOMAIN NAMES

Please list all domain names along with registrar details.

Not Available/Not Applicable

Domain Name	Registrar	Registrar Admin URL	Admin Username	Admin Password

Notes

EMAIL SETUP

Please list the Email Provider/s

Not Available/Not Applicable

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

Notes (Specific Customization etc)



SERVERS

PHYSICAL SERVERS

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

Not Available/Not Applicable

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)

Not Available/Not Applicable

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

Notes (Configurations /Failovers etc)



LOGICAL SERVER INSTANCES

Please list all Physical Server & Virtual Server Instances (including in Data-Centres)

Not Available/Not Applicable

Server Name	Primary IP Address	Location	Serial Number (if Physical)	Virtual Host (if Virtual)	Purpose?

Notes (Specific Configurations, etc)

CREDENTIALS

DOMAIN ADMINISTRATOR CREDENTIALS

Please list all Domain Administrator Credentials

Not Available/Not Applicable

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.

Not Available/Not Applicable

Device Name	Local Admin Username	Local Admin Password	Purpose?

DSRM CREDENTIALS

Please list all Directory Service Restore Mode Passwords for all Domain Controllers.

Not Available/Not Applicable

Server Name	Password

SQL CREDENTIALS

Please list all SQL Server / SA Credentials

Not Available/Not Applicable

Server Name	Username	Password



BACKUPS

ON-SITE BACKUPS

Please list all On-Site Backup Solutions in use

Not Available/Not Applicable

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.

Not Available/Not Applicable

Vendor	Admin URL	Admin Username	Admin Password	Purpose?

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



TELEPHONY

VOIP / PHONE SYSTEM

Please list all VOIP / Hosted PABX & Phone Systems

Not Available/Not Applicable

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)

Not Available/Not Applicable

Vendor	Account Number	Primary Contact	Support Phone	Purpose?

Notes (Specific Configurations etc)

Notes continued...

This section of the page is a large, vertical rectangular area designed for taking notes. It features a light gray background with horizontal white lines spaced evenly down the page, creating a series of writing rows. The top of this area is defined by a solid blue header bar containing the text 'Notes continued...'. The lines extend from just below the header bar to just above the bottom edge of the page.



THANK YOU