

IT Glue



Quick Reference Guide for MSP Vendors

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Purpose of this Guide

The intent of this guide is to provide step-by-step instructions on how ABC's vendors should document information within IT Glue, throughout the pre-assessment, post-assessment, deployment, and completion phases at each site.

As a result of comprehensive and concise vendor documentation, ABCs' internal Support and Systems teams will be able to access necessary data to sustain optimal support and service to each site onboarding the MSP platform.

Overview of IT Glue

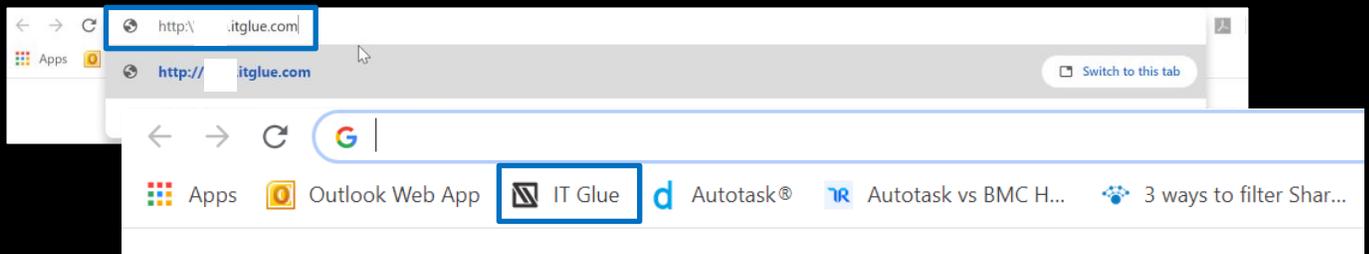
The company uses IT Glue, a cloud-based documentation platform to document, organize, and facilitate quick access to information and ensure internal Support and Systems teams can operate efficiently while providing optimal levels of IT services across all sites.

Features and benefits include:

IT Glue Key Features & Benefits	
Centralized Documentation	All-inclusive documentation specific to each site is housed within a single repository and readily available to Support, Services, and Systems teams in fulfillment of client needs during and after the MSP onboarding process.
Standardized Workflows	Granular control over notifications enables decision-making on which events trigger specific workflows.
Accredited Security	SOC 2 compliant and its infrastructure and application security are regularly audited and verified by third parties.
3rd-Party Integrations	Boasts over 30 native integrations plus an open API to help build our own.
Password Management	Enables the power to create ironclad passwords as its Chrome Extension pulls this information directly into login fields.
Enhanced Productivity	A SaaS-based platform enabling access across devices and their mobile app and ensuring ideal user experience while on the road.

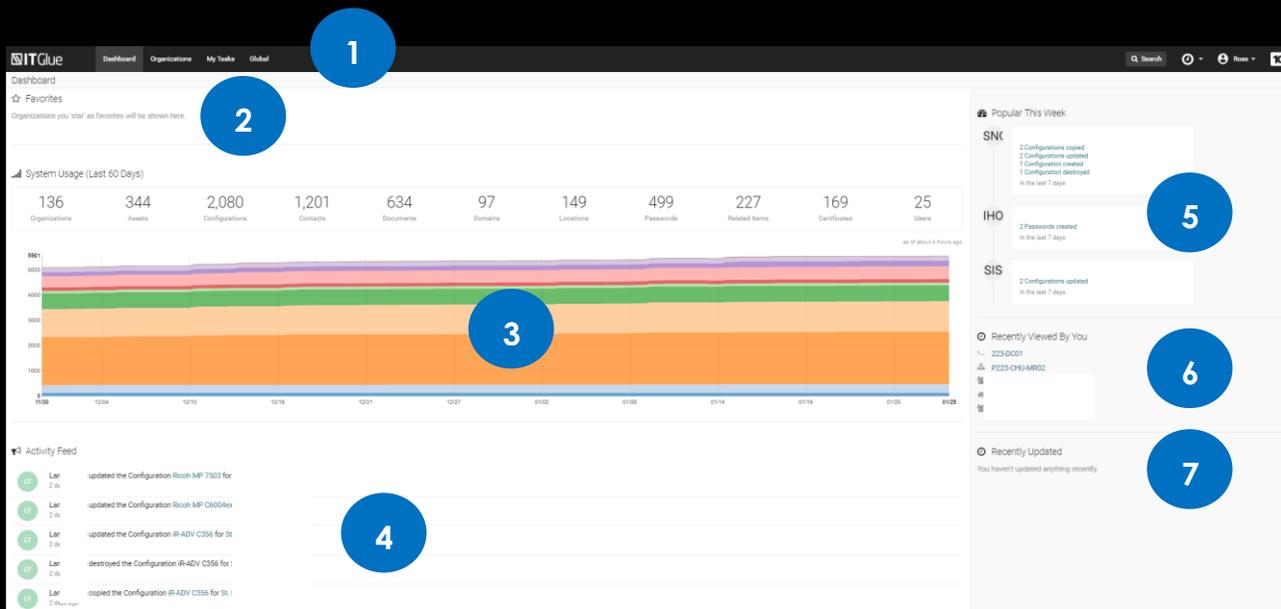
Accessing IT Glue

To access IT Glue, enter <https://abc.itglue.com> or click the **IT Glue** icon.



Navigating the Dashboard Tab

Once logged into IT Glue, the **Dashboard** screen displays. (See table below for an explanation of each feature and function).



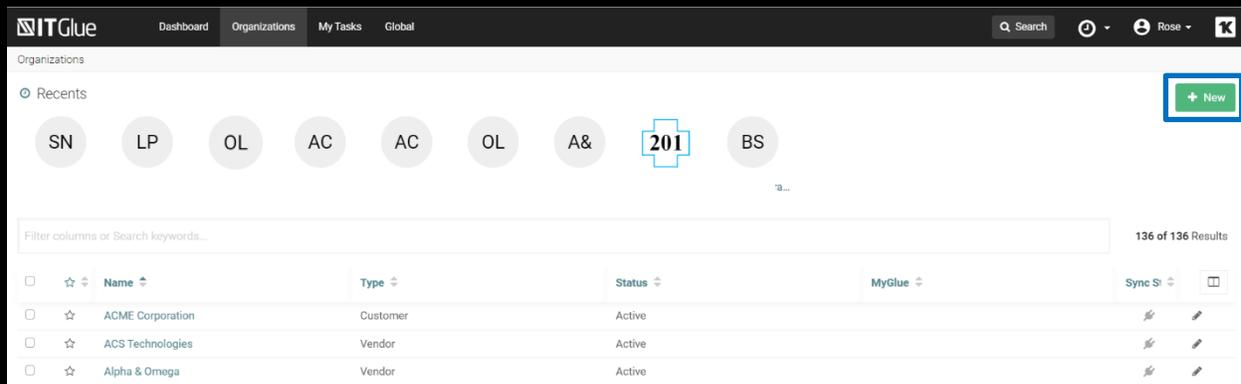
Dashboard Functions		
1.	Menu Bar	Contains Dashboard, Organizations, My Tasks, and Global tabs.
2.	Favorites	Displays organizations commonly accessed.
3.	System Usage	Provides graphical and numerical representation of all organizations, assets, etc.
4.	Activity Feed	Displays activities of all IT Glue users.
5.	Popular This Week	Provides a snapshot of activities within the past seven (7) days.
6.	Recently Viewed By You	Lists recently viewed organizations, screens, etc.
7.	Recently Updated	Displays core assets recently updated.

Navigating the Organizations Tab

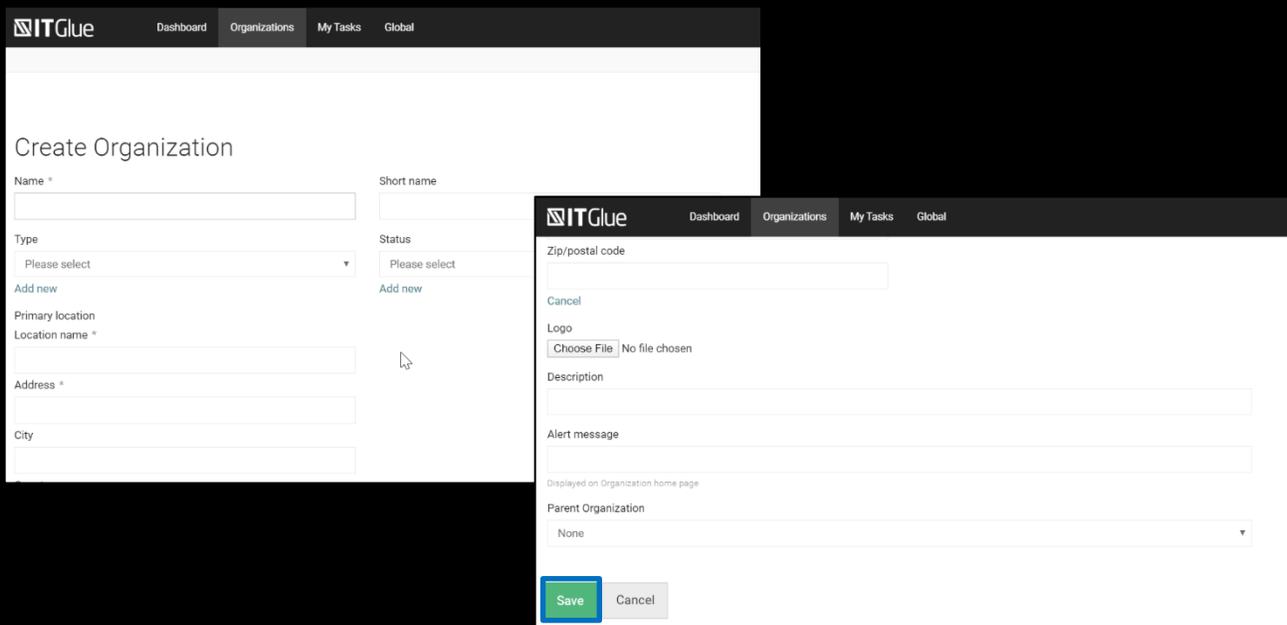
The **Organizations** tab displays recently accessed organizations as well as an exhaustive list of organizations.

Note: Although creating new organizations is commonly performed by ABC's Support team, occasionally, vendors may need to perform this function.

1. To create a new organization, click **New**.



2. On the **Create Organization** screen, enter required information and click **Save**.



LAN

Responsible Group (Onboarding Team/Infrastructure Team)

- All LAN Network Info
- Network Diagrams
- Site IP Addressing Spreadsheet
- Updating the IP Addressing Spreadsheet With Network Devices/IPs

Responsible Group (Onboarding Team/Systems Team)

- DHCP – Related Info
- Server Rack Pictures
- MDF/IDF Closet Pics
- Updating the IP Addressing Spreadsheet with Server/Printer/Storage/etc.
- Create 1 LAN entry per location
- Attach the Site IP Addressing spreadsheet containing IP addresses, VLANs, etc.
- Ensure all servers/printers/devices are associated with their IPs in the spreadsheet and name the document **IP Addressing.xlsx**

Ensure the following entries are defined:

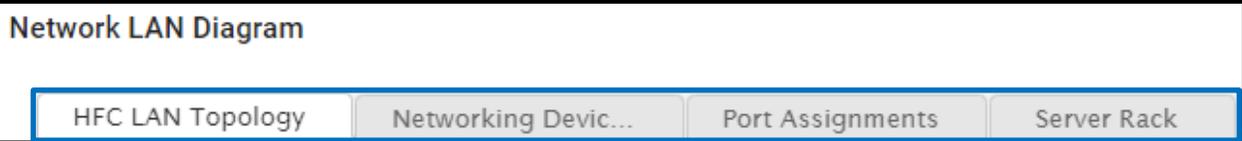
- Name
- Location
- Subnet
- Default Gateway
- DHCP Scope
- Firewall
- DHCP Server
- Switches
- Servers

Note: Pictures and diagrams can be converted into dynamic images using **LucidChart**. This feature also allows the creation of links from represented devices to corresponding IT Configurations or Locations. While desirable, this functionality is optional.

Diagrams and pictures are required and additional diagrams or pictures are highly recommended.

Required Diagrams

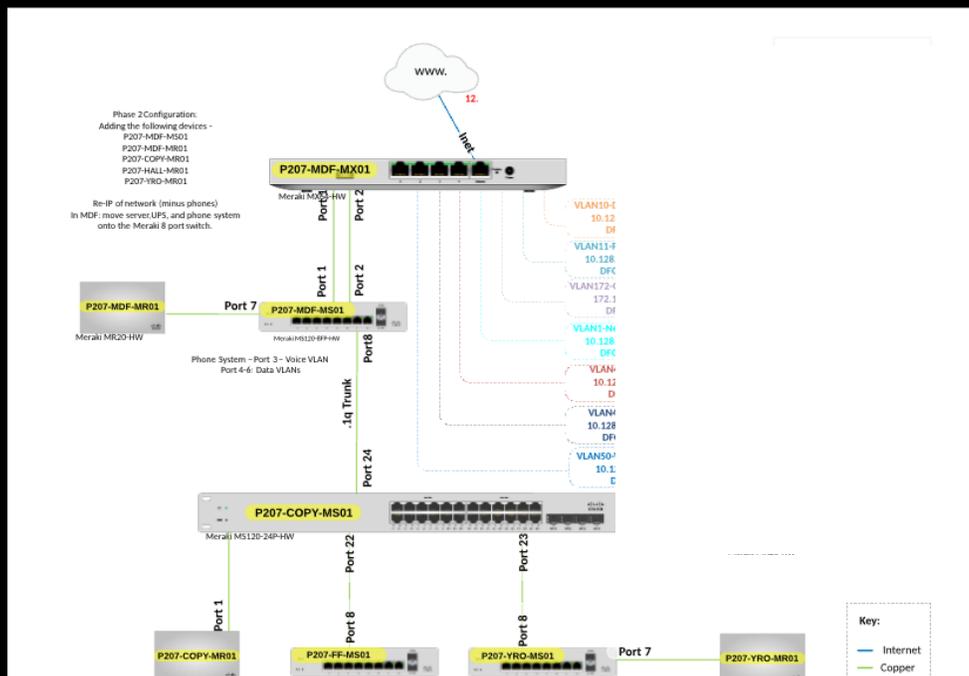
Utilize **Tags** in LucidChart to keep all diagrams/pictures together for easy reference. Below is a sample of standard tags used at ABC and add additional tags, as necessary.



Note: When adding diagrams in LucidChart, be sure to activate **Embedded Code**, otherwise viewing diagrams may be problematic.

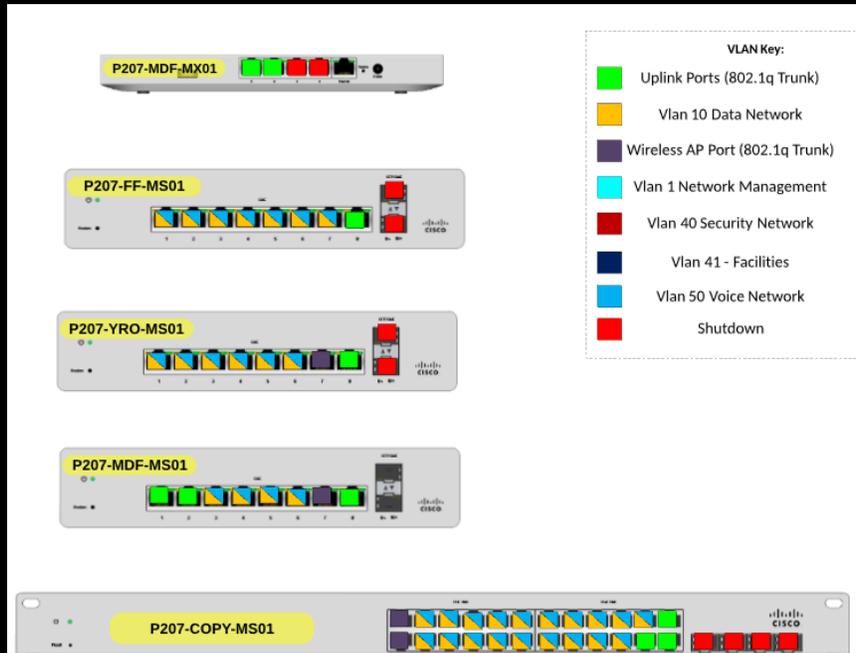
Local Area Network

This drawing shows all network devices, connections, and VLANs for a site/location.



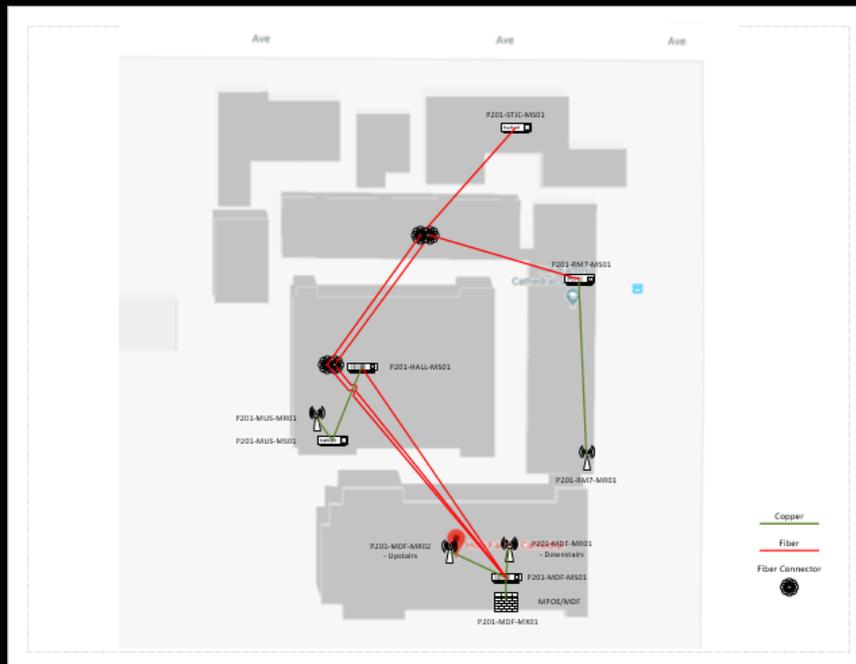
Switch Port Assignment Diagram

This diagram shows all switches and port configurations.



Site LAN Topography

This diagram shows a site's LAN topography.



Required Pictures

Attach pictures for all network equipment, servers, printers, power devices, etc. and name pictures according to what they depict, prior to uploading.

Server Rack Picture

Take one or more pictures of the server rack and label key pieces of equipment, as below. **Note:** IT Glue's **Server Rack Template** can be used.



IDF Closets

Take pictures of equipment in each IDF closet and append descriptive labels to each device—like Server Rack pictures.

Licensing

Responsible Group (Onboarding Team/Support Team)

- Desktop Apps/Devices

Responsible Group (Onboarding Team/Infrastructure Team)

- Network Apps/Devices

Responsible Group (Onboarding Team/Systems Team)

- Server Apps/Devices

Ensure the following items are entered for each license:

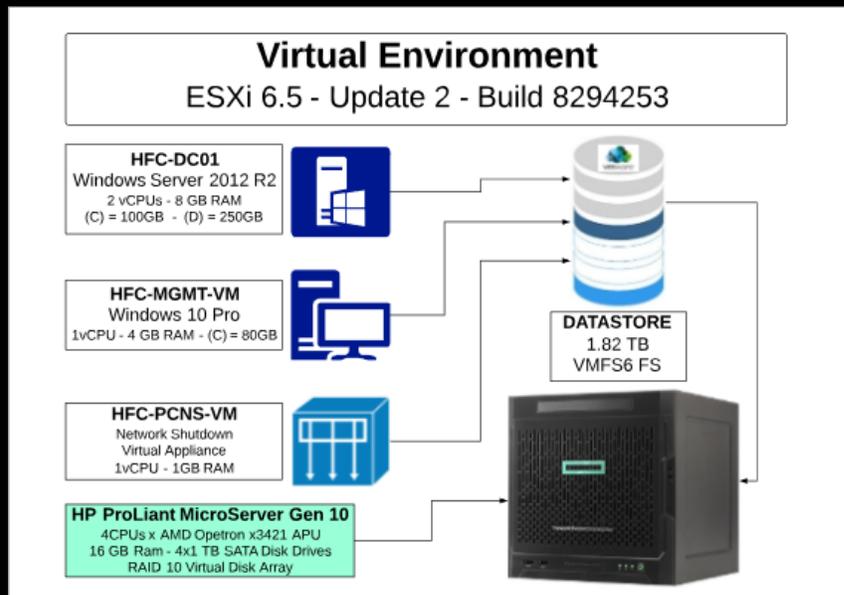
- Name
- Version
- Seats – if applicable
- License Key(s) – if licenses are used by specific users (i.e. Acrobat Pro), list users with license keys
- Purchase Date (if known)
- Renewal Date (if known)
- Vendor (purchased from) – Optional
- Account rep/Point of Contact – Optional
- Owning Host/Server/Device
- Path to install files – Where installation files are located
- Ensure any users/passwords for associated web portals are listed in the passwords section

Virtualization

Configure the following for each virtualization entry:

- Virtualization Friendly Name – Optional for locations with only 1 host
- Office Location
- Virtualization Technology
- Version
- Storage Technology
- Storage Connection Type
- Storage Device
- Virtualization Hosts
- Virtual Machines
- Virtualization Management Server – if applicable
- Ensure admin user account credentials in Passwords section and link to it under Related Items
 - Ensure linking to the password entry and not some other area (i.e. licensing or the server configuration)
- Virtualization diagrams are optional at smaller locations with only 1 host and local storage. **Note:** If a site has multiple hosts and network-based storage, a diagram should be included.

Use the **Virtual Environment** template within LucidChart to include a diagram, as below:



Wireless

1. Create wireless entries for each SSID in use and name each entry to match SSID name.
2. Ensure all wireless entries have the following fields configured:
 - Wireless Type
 - SSID Name
 - SSID Description
 - SSID VLAN – if applicable
 - Physical Location
 - Encryption Type
 - Enter any Wi-Fi pre-shared keys in the Passwords section, then link the entry back to the appropriate Wireless network under Related Items. When naming entries, use the following format: SSID-<SSID name>
 - Access Points
 - Wireless Controller(s) – if applicable
 - Management URL/IP Address/Server
 - **Note:** Include any additional information that could be useful from a Support standpoint that may not be identified above.
 - Wireless Diagram – Create a Google Map image of the site and note the different access point locations with WIFI icons. Annotate each entry with the device name and its location.

Printing

- All initial printer documentation
- Ongoing printer documentation

Required fields:

- Print Server(s)
 - Printer(s)
 - SNMP Community – RO
 - SNMP Community – RW
 - Utilize the **Note** field for any other Support-related information not identified elsewhere
1. Create a table, as below, in the **Printing Inventory List** section and ensure headers are in the first row.

HOST NAME	MAKE/MODEL	PRINTER TYPE	DEPLOYMENT METHOD	IP	DRIVER TYPE	LOCATION
KM2	Kyocera/CS 60002i	Network	Manual	10.	PCL6 Class Driver	Copy Room
HF-I-M28	HP Color LaserJet MFP M281fdw	Network	Manual	10.	PCL6 Class Driver	Front Desk
HFC-M75i	HP Color LaserJet M750	Network	Manual	10.	PCL6 Class Driver	Formation Office

2. Fill in all applicable cells in the table using the guidelines below. **Note:** Use one row for each printer.
 - Name – List Printer's Hostname
 - Make/Model
 - Printer Type – Local or Network
 - Deployment Method
 - GPO
 - Login script
 - Manual
 - USB
 - Wireless
 - Other
 - IP – if applicable
 - Driver Type – PCL <version>/PostScript/Universal/Open
 - Location