IC 360

# Your Virtual IT Department

Cloud Managed Services Manual

IC 360 Solutions 6/26/23

# How to Reach Us

## Email
help@ic360.ca

## Phone
English: 613-702-9449
French: 613-702-9448

## Escalations
escalations@ic360.ca

## Feedback
feedback@ic360.ca

# Table of Contents

# Introduction

Your organization has subscribed to "Managed Services". Managed Services is a term used to describe the outsourcing of your IT department.

We will manage, monitor, and support your IT systems, specifically:

- Microsoft accounts and data (e.g., Outlook, Teams, OneDrive, etc.)
- Corporate computers and phones (device management)
- Network equipment and configuration

## We use Microsoft 365

Your workplace is set up to be cloud-first, which means your computers are managed over the internet. We will provide an email address and password for your Microsoft 365 account. This is used to access all of the apps at www.office.com, and/or log in to your corporate Windows computer.

## Help Us Help You!

We aim to eliminate the need for support as much as possible and need your help. Instead of tolerating issues, let us know when something is wrong and we will fix it and figure out if and how to prevent it next time.

We believe in the good governance of systems and getting ahead of issues. The only way to improve is if we hear about problems.

## We look forward to working with you and your team!

- The IC 360 Team

# Our Services

## IC 360 Portal

See tickets, projects, and/or invoices, depending on how you interact with our services. You can request access by emailing help@ic360.ca.

## Ordering Equipment

Our online store offers various business technologies with easy search and filter options. Place orders directly, shop for options, or request quotes. Please follow your company's specific purchasing policies.

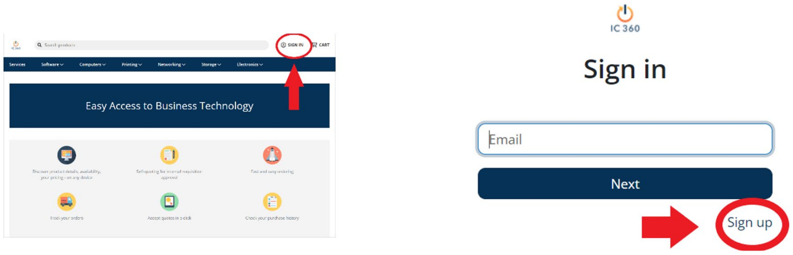
Register for an IC 360 online store account:

**https://shop.ic360.ca**

*Figure 1*

Step 1: Sign into the Store

Step 2: Sign up for an account



Please review any purchases with us to ensure they achieve your plans for security, compatibility, and ongoing support requirements. Kindly reach out to your Account Manager or email help@ic360.ca.

***Please advise your Account Manager on who has the authority to place orders for new hardware and software.***

## Microsoft 365 Training

Microsoft has excellent, free online training resources.

We partnered with Microsoft to offer dedicated training sessions for groups of 30 or more. If interested, kindly email us at help@ic360.ca.

To access Microsoft training:

**https://support.Microsoft.com/en-us/training**

# Our Policies

## Policies Overview

Our standard practices intend to meet the following objectives:

1. Consistent and positive user experience
2. Optimized security
3. Minimal need to log helpdesk tickets
4. Efficient use of staff time

## Managing User Accounts

We strive for a few best user accounts practices:

### *No Shared Accounts*

Since we require Multifactor Authentication (MFA), shared accounts are not possible. If multiple people require access to one email address, we will create a Shared Inbox. This is much simpler for everyone and does not require a license.

### *No Recycling of Accounts*

Every individual should have a fresh account when starting. If previous data is needed, that data should reside in a Teams/SharePoint and/or a Shared Inbox. Recycling accounts creates privacy and security risks and makes onboarding more difficult.

### *One Account per Person*

Except for Global Administrators, each employee should have a **single** account. If multiple email addresses are required, this can be accomplished with Shared Inboxes and/or email aliases (alternate addresses).

### *Global Administrator Accounts*

Global Administrator permissions should not be assigned to daily use accounts. This greatly reduces risk as the accounts are not being exposed to email and web activity that regular use entails.

### *Changing Permissions*

We often receive additional access requests, such as delegating access to another email inbox or being added to a shared inbox or team. For such changes involving permissions, we need written approval from the Site Lead on the support request / ticket.

### *Onboarding Users*

Email help@ic360.ca and provide the following details (ideally at least a week before they start):

- Full name
- Title
- Phone number
- Desired email address
- Any Teams or Groups to join them to
- Who they report to (their Manager/Supervisor)
- Start date
- Do they require any hardware to be ordered?

### *Offboarding Users*

Email help@ic360.ca and provide the following details (ideally at least a week before they depart):

- End date
- Do we wipe/reset any devices? If so, we need the computer name or the serial number of those devices.
- Do we reassign their OneDrive data to anyone or just delete it?
- Do we convert their mailbox to Shared Inbox and reassign or just delete it?

### *End-User Contact Information*

- We require an email and phone number for all users. When we create a ticket, the automatic response will share what we have on file.

## Third-Party Application and Hardware Support

Typically, this is done by the vendor. For example, if you pay a subscription fee for a medical database or design software, you should have technical support within that agreement.

## Patching

We have policies to automate the patching of corporate computers. Computers must be rebooted at least once per week and left on and connected to power overnight as much as possible. If computers are not being rebooted, we may need to force a reboot to ensure patches are being completed and devices are kept secure from known vulnerabilities.

**Regularly rebooting is critical to computer performance and security.**

## Browser Support

We support the Microsoft Edge browser. You may use other browsers, but they may expose computers to security risks. Additionally, we cannot backup browser data from other browsers. If you use Chrome, log in to it with your Google/Gmail account to sync the browser data.

*Figure 2*

## Troubleshooting Limits / Computer Resets

If we are experiencing an intermittent issue or unknown bug/error message, this can often be due to a corrupt installation of Windows. If we cannot resolve the issue within one (1) hour of troubleshooting, we may reset the computer, ensuring a clean operating system installation.

## Exclusions from Regular Support

Anything that represents an Add, Move, or Change, is outside the scope of regular support. This is not to be restrictive but to ensure the sustainability of our services. We can help with the full range of IT issues and projects but cannot work them into a fixed support budget, as it is dedicated to addressing regular support requests only.

Examples of exclusions include but are not limited to:

- Deploying a new application
- Designing new Teams or SharePoint structures
- Moving to or opening a new office
- Redesigning security protocols
- Changing your email address/primary domain
- Upgrading from Windows 10 Home to Pro

Other support exclusions:

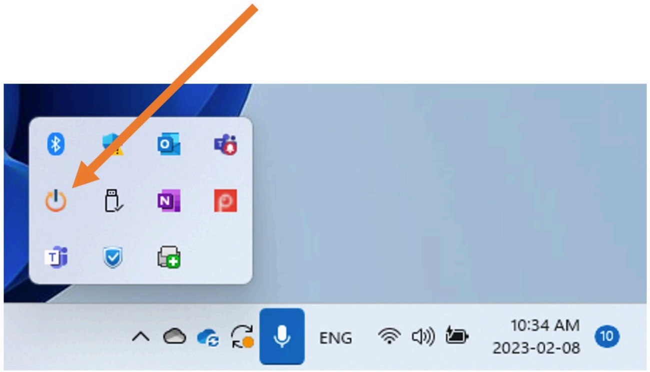
- Support of out of warranty equipment
- Personal device support, aside from accessing web-based resources (e.g., www.office.com)
- Personal internet connections: performance and settings are to be supported by the Internet Service Provider
- Home network configuration, performance or troubleshooting
- Smart devices (e.g., smart speakers, lights, etc.)

## Remote Monitoring and Management Software (RMM)

## *What is it?*

We use the Datto RMM Agent to manage and monitor corporate computers. It gathers real-time information about the devices' health and status.

You may notice it running on your computer



**RMM is <u>only</u> for corporate computers, not personal ones.**

## *Why do we need it?*

The RMM provides the same level of access a traditional IT department would have, but over the internet. This enables faster remote support.

It can proactively monitor a device, deploy patches and policies, create alerts, execute scripts, run scheduled jobs, or enable a remote connection to the device. It grants IC 360 remote control access as well. We will always ask for permission before taking over a device. There is also an audit log of all technician access of devices.

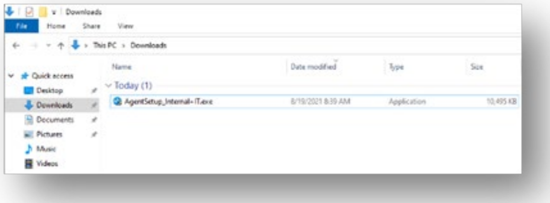
## *How to install the RMM?*

If you need to manually install the RMM, we will email you a link to the file. The installation is quick and does not provide much feedback or confirmation post-installation. (It will just start running in the background.) You will see an icon in the system tray (down by the clock on Windows or along the top menu bar on Mac).

## *Windows Installation (If received by email)*

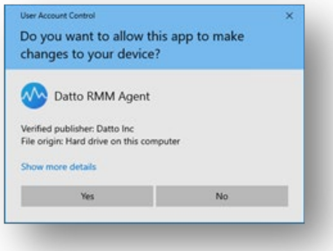
1. Download the agent by clicking the link provided in your email.

2. Go to the “Downloads” folder and double click on the downloaded “.exe” file.



| Name | Date modified | Type | Size |
|---|---|---|---|
| Today (1) | | | |
| AgentSetup_Internal+IT.exe | 8/19/2021 8:39 AM | Application | 10,495 KB |

3. Click on “Yes” to continue, and the agent will be installed automatically.



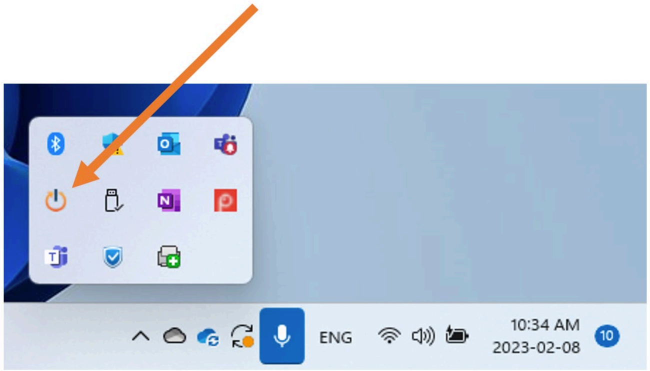
User Account Control

Do you want to allow this app to make changes to your device?

Datto RMM Agent

Verified publisher: Datto Inc
File origin: Hard drive on this computer

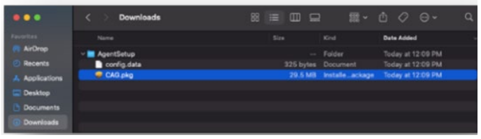
4. To verify, click on “^” at the bottom right corner of the screen and look for this icon (it will be blued briefly, and after a few minutes it will display our icon).



## *MacOS Installation*

1. Download the agent by clicking on the link provided in your email.
2. Go to the “Downloads” folder and double click on the downloaded “.pkg” file *(Figure 7).*

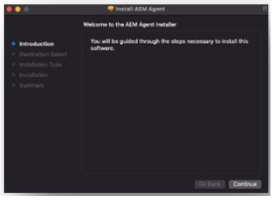
Figure 3



| Name | Size | Kind | Date Added |
|---|---|---|---|
| AgentSetup | -- | Folder | Today at 12:09 PM |
| config.data | 325 bytes | Document | Today at 12:09 PM |
| CAG.pkg | 29.5 MB | Installe...ackage | Today at 12:09 PM |

3. Click on “Continue” *(Figure 8).*

Figure 4

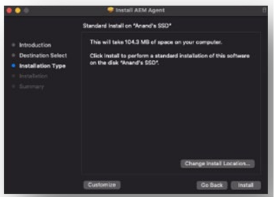


Welcome to the AEM Agent installer

You will be guided through the steps necessary to install this software.

4. Click on “Install” *(Figure 9).*

Figure 5



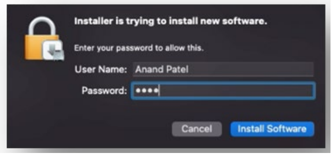
Standard Install on "Anand's SSD"

This will take 104.3 MB of space on your computer.

Click Install to perform a standard installation of this software on the disk "Anand's SSD".

5. Enter your passcode if it asks, click on “Install Software” *(Figure 10).*

Figure 6



Installer is trying to install new software.

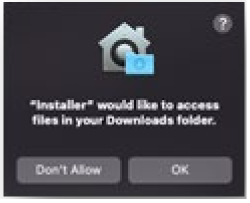
Enter your password to allow this.

User Name: Anand Patel

Password: ••••

6. If it asks, click on “OK” *(Figure 11).*

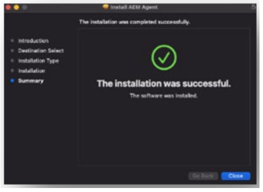
Figure 7



“Installer” would like to access files in your Downloads folder.

7. Once the agent has been installed, click on “Close” *(Figure 12).*

Figure 8



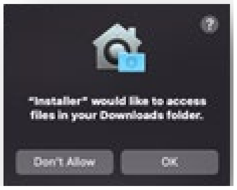
The installation was completed successfully.

The installation was successful.

The software was installed.

8. If it asks again, click on “OK” *(Figure 13).*

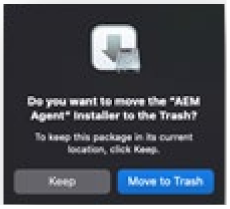
Figure 9



“Installer” would like to access files in your Downloads folder.

9. Click on “Move to Trash” *(Figure 14).*

Figure 10

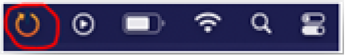


Do you want to move the “AEM Agent” Installer to the Trash?

To keep this package in its current location, click Keep.

10. To verify, check the top right corner of the screen *(Figure 15).*

Figure 11



# Defined Roles

We have created roles that are to be **filled on your side.** (These are documented in our contacts list for internal reference.)

| Role | Function | Tech Working Group? | Special IC 360 Portal Access? |
|---|---|---|---|
| Site Lead | A role within the client that is the overall decision-maker. | Recommended | Full access to all data on the IC 360 Client Portal (invoicing, projects, assets, etc.) |
| Technical Account Coordinator (TAC) | Your lead contact at IC 360. When you need to reach out to us, they are dedicated to your account and will lead quarterly planning sessions. They are an escalation point for support issues. | Required | |
| Reports Recipient | Any number of people that should be receiving monthly status reports of computers and network equipment. | Optional | Regular access |
| Alerts Recipient | We will configure a shared mailbox on your system and assign one or more people to it to receive any relevant alerts, such as network down, virus detected or domain name expiration alerts. | Optional | Regular access |
| Information Management Lead | A role that we rely on when discussing questions about how to manage data in systems such as SharePoint. | Optional | Regular access |
| Telephone Lead | Responsible for telephones. | Optional | Regular access |
| Power Users | One or more technology champions person(s) at the client organization. Typically, they can help with the planning or adoption of technology. | Required | Regular access to portal + Microsoft Teams Shared Portal |
| Billing Lead | For invoicing or other billing matters | Optional | Access to invoices |

| Role | Function | Tech Working Group? | Special IC 360 Portal Access? |
|---|---|---|---|
| Purchasing Leads | People with authority to make purchases | Optional | |
| Service Desk Subscriber | We closely track contacts in our service desk database, so we have their full and correct contact information and title. We use this information to enable us to provide support, send important email updates, and arrange for training when required. | No | Regular access |

## Tech Working Group (TWG)

The TWG is made up of select representatives who meet quarterly (at minimum) to address systemic issues. (We will review any current issues and act on the Technology Work Plan.)

# New Computer Setup Steps

## Need Help?

If you are experiencing **any** issues, contact us at help@ic360.ca.

If you need assistance with following our instructions, we can arrange a call.

## Step 1: Set up your Microsoft 365 Account

On any computer, go to www.office.com and log in with your new password. It will force you to choose a new password, as well as follow steps to set up multi-factor authentication (MFA).

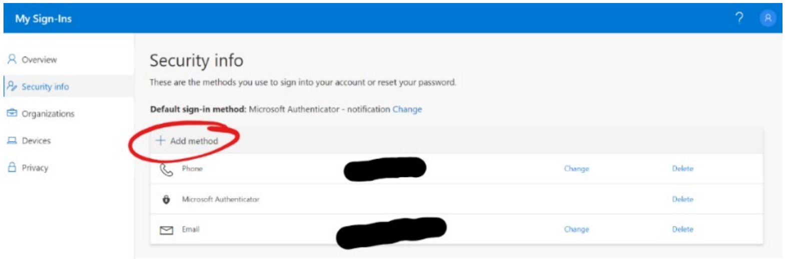
## Step 2: Setting up Multifactor Authentication (MFA)

### *What is Multifactor Authentication (MFA)?*

*MFA is a standard practice to secure all your accounts. Without MFA, the only thing between the internet and your data is your password. Enabling MFA improves your security by over 99.9% by adding a layer of protection to the sign-in process. It serves as a secondary method to confirm your identity, such as a text message or phone notification. This way, you need to know your password, but also have your phone with you.*

### *Steps to set up MFA:*

1. Install Microsoft Authenticator on your phone. (iPhone / Android)
2. Go to https://mysignins.microsoft.com/security-info and set up at least two (2) alternate methods as illustrated in Figure 12.
3. We recommend the Microsoft Authenticator app as the primary method.
4. Figure 12



Security info

These are the methods you use to sign into your account or reset your password.

**Default sign-in method:** Microsoft Authenticator - notification Change

Phone [redacted]

Microsoft Authenticator

Email [redacted]

5.

6. Open the Microsoft Authenticator app (Figure 13) on your phone.
7. If you see a login prompt when you start the app, cancel it.
8. Tap the **+** > **Work or school account** as shown in *Figure 18.*
9. Click **Scan a QR code** *(Figure 19).*
10. Use your phone to scan the QR square that is on your computer screen.
11. Once you see the account on your phone screen with your company name, switch back to your computer and click next.
12. Add your phone number as a secondary method by clicking **Add Method**.
13. Add any additional methods, if required.

### *Resetting Your Password*

*Your Microsoft account should allow for a self-reset. If you are trying to log into any Microsoft services and receive an incorrect password notice, look for the password reset or forgot password option. It should walk you through a quick reset. If not, ask your manager to email help@ic360.ca to request a reset.*

## Step 3: Setting up your Corporate Windows Computer

If you receive a new computer with a login prompt after turning it on, sign in using your work email and password.

***If it asks you to set up for personal use or work, choose "Work".***

It will then ask you to log in with your **work** email and password.

By following this step, you will join the computer to your work's "Cloud" network. It will automatically install any automated applications, such as Microsoft Outlook and other Office apps, and apply the necessary policies. (This will depend on your employer's settings.)

***The process above is called Autopilot. It can take up to 2–3 hours depending on the applications and settings and may reboot a couple of times. This is normal.***

### *What is Autopilot?*

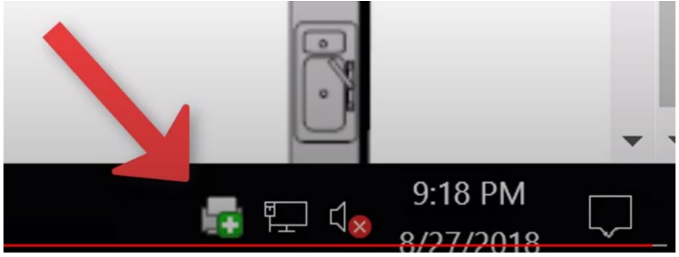
Autopilot makes it a breeze for new users to set up company-issued computers. The computer automatically installs the required applications, settings, and policies. (The IT team handles all else, and you do not need to physically bring the computer to a technician.)

## Step 4: Manual App Installations

You may have applications that do not automatically install. Discuss with your internal IT lead (if applicable) or email help@ic360.ca for assistance with any such installations.

## Step 5: Printers

If you have “Managed” Printers, you will see the printer’s name with “**Managed”** beside them. Those printers are automatically deployed through our policies. Other printers are manually installed.



## Step 6: Microsoft Teams

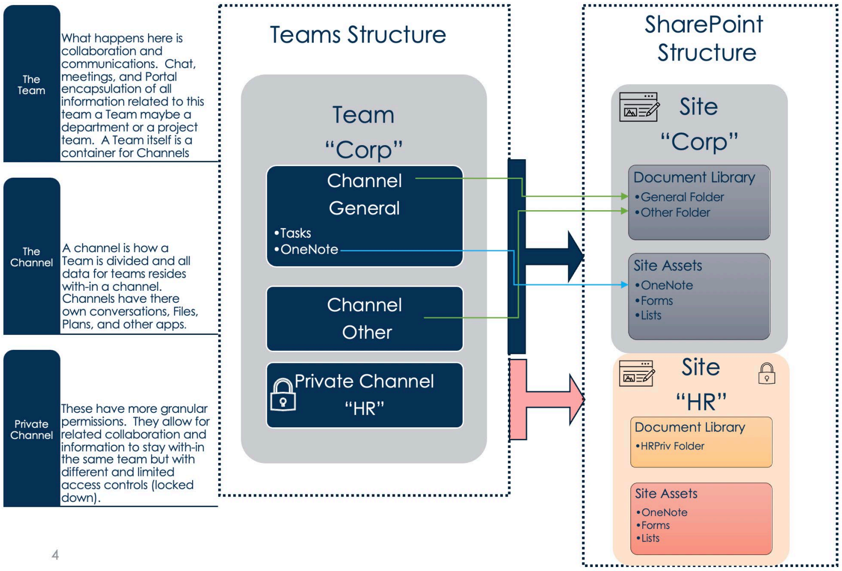
When your account was created, you should have been added to the correct Teams. They will appear when you sign into Teams on your computer or phone. If you are missing any, ask your manager to review first. If you still do not have the right access, email help@ic360.ca.

## Step 7: Sync Teams and SharePoint

It is important to understand that Teams and SharePoint are linked. Teams allows you to work with your team. It is the hub for teamwork. SharePoint allows you to work across your organization. It is known as the intelligent intranet. Teams sits “on top” of SharePoint.

When you create a Team, a SharePoint site is created in the background to store the data. This also happens if you create a “Private Channel” within a Team (see Figure 20).

*Figure 20*



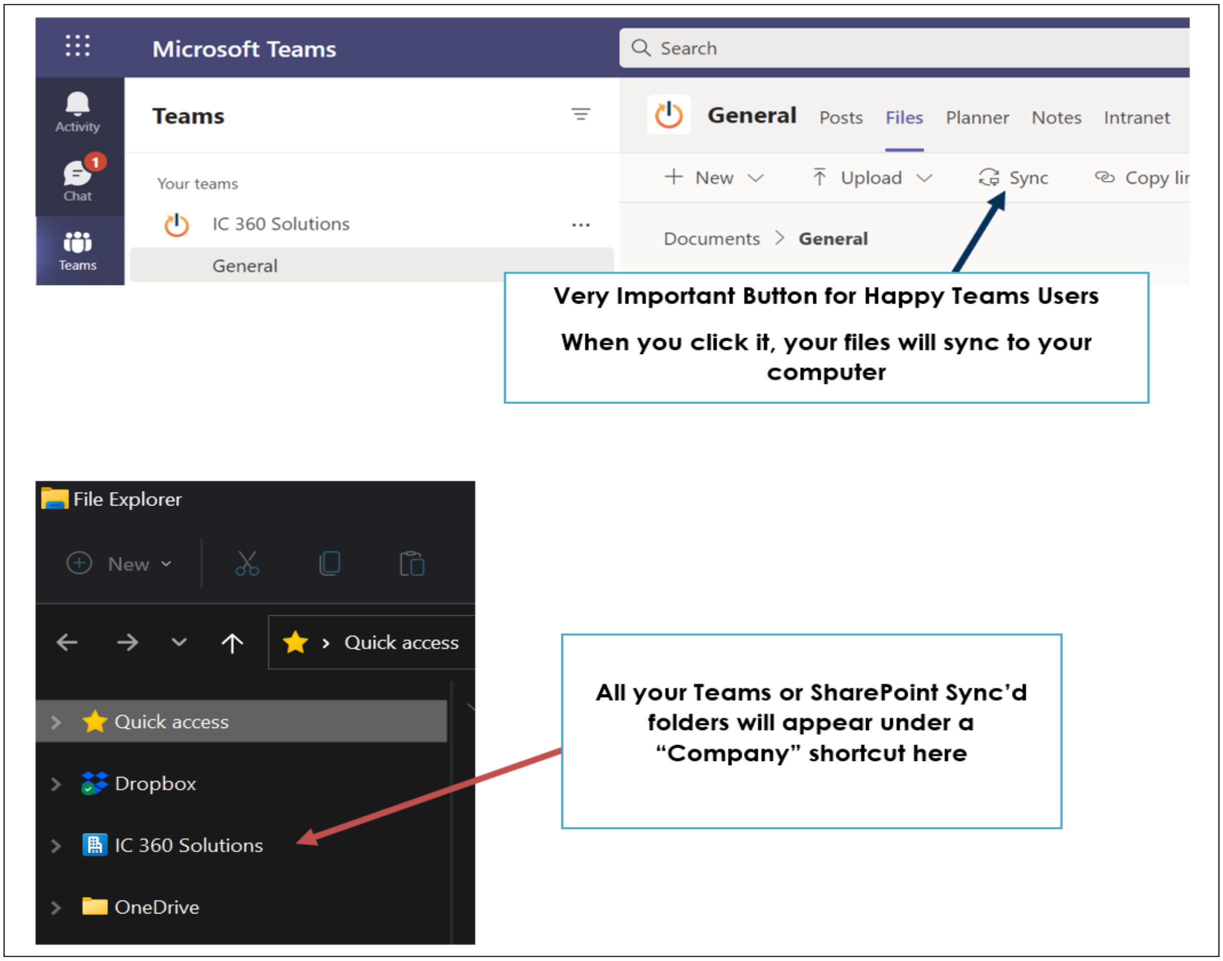
What happens here is collaboration and communications. Chat, meetings, and Portal encapsulation of all information related to this team a Team maybe a department or a project team. A Team itself is a container for Channels

A channel is how a Team is divided and all data for teams resides with-in a channel. Channels have there own conversations, Files, Plans, and other apps.

These have more granular permissions. They allow for related collaboration and information to stay with-in the same team but with different and limited access controls (locked down).

Syncing Teams and SharePoint is often the difference between hating Teams and loving it! To access files directly, make sure you are first logged into your OneDrive work account, then click the Sync button on the folder you want to sync *(Figure 21).* All your Teams and SharePoint synced folders will appear under a Company shortcut in File Explorer.

*Figure 21*



**Very Important Button for Happy Teams Users**

**When you click it, your files will sync to your computer**

**All your Teams or SharePoint Sync'd folders will appear under a "Company" shortcut here**

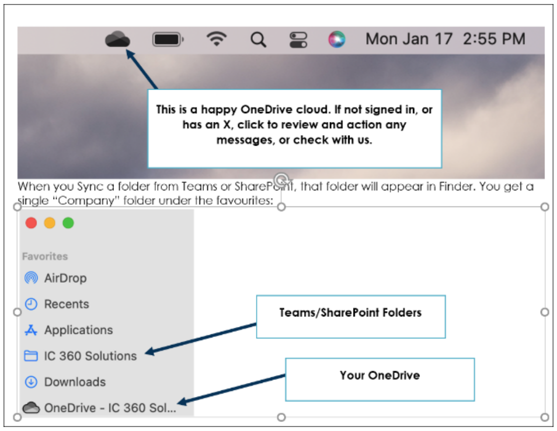
# Teams Tips for Macs

## *Accessing Synchronized Teams and SharePoint Folders*

First, make sure you’re logged into OneDrive (Download here).

When you Sync a folder from Teams or SharePoint, that folder will appear in Finder. You get a single “Company” folder under the favourites *(Figure 22).*

*Figure 22*



This is a happy OneDrive cloud. If not signed in, or has an X, click to review and action any messages, or check with us.

When you Sync a folder from Teams or SharePoint, that folder will appear in Finder. You get a single “Company” folder under the favourites:

Teams/SharePoint Folders

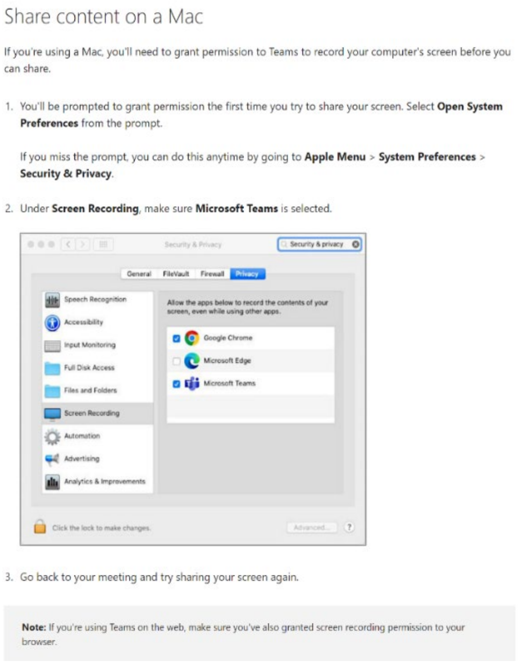
Your OneDrive

## *Allow Teams Screen Sharing on Mac*

Teams will work, but if you want to share your screen, you must grant it “Screen recording” permissions.

*Figure 23* is copied from this page: [Share content in a meeting in Teams (microsoft.com)]()

*Figure 23*



Share content on a Mac

If you're using a Mac, you'll need to grant permission to Teams to record your computer's screen before you can share.

1. You'll be prompted to grant permission the first time you try to share your screen. Select **Open System Preferences** from the prompt.

   If you miss the prompt, you can do this anytime by going to **Apple Menu** > **System Preferences** > **Security & Privacy**.

2. Under **Screen Recording**, make sure **Microsoft Teams** is selected.

Allow the apps below to record the contents of your screen, even while using other apps.

☑ Google Chrome
□ Microsoft Edge
☑ Microsoft Teams

3. Go back to your meeting and try sharing your screen again.

**Note:** If you're using Teams on the web, make sure you've also granted screen recording permission to your browser.

# Phone Set-Up: Steps for Employees

There are the apps that should be downloaded on your phone:

**iPhone**

- Microsoft Authenticator (Required)
- Microsoft Outlook (Required)
- Microsoft Office
- Microsoft OneDrive

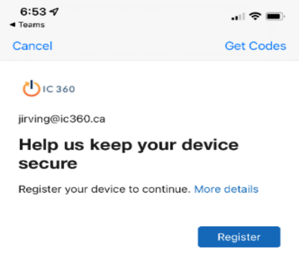
**Android**

- Microsoft Authenticator – Apps on Google Play
- Microsoft Outlook – Apps on Google Play
- Microsoft OneDrive – Apps on Google Play
- Microsoft Office: Word, Excel, PowerPoint & More – Apps on Google Play

## iOS Instructions

1) Opening Outlook for the first time on your device, you will receive a prompt to register your device *(Figure 24)*.
2) Click **registe**r.
3) You will receive a notification that your IT administrator is helping you protect work in the app *(Figure 25)*. Click **ok**.
4) Proceed to set a PIN *(Figure 26)*. This PIN is different from your phone PIN and will be used to access your company resources.

*Figure 24*

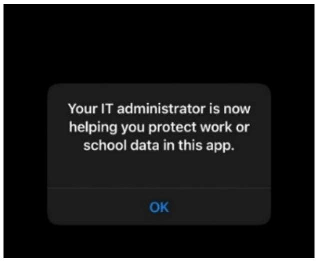


jirving@ic360.ca

**Help us keep your device secure**

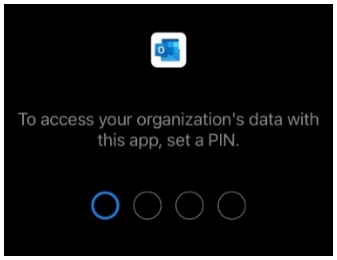
Register your device to continue. More details

*Figure 25*



Your IT administrator is now helping you protect work or school data in this app.

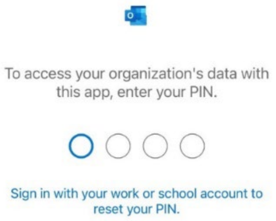
*Figure 26*



To access your organization's data with this app, set a PIN.

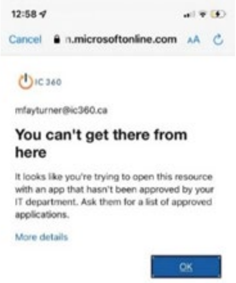
5) After setting the PIN, you can use it to sign in and access your email *(Figure 27)*.
6) If you try to access your email with any other application besides Outlook, you will receive the message that "*You can't get them from here*" as shown in *Figure 28.*

*Figure 27*



To access your organization's data with this app, enter your PIN.

*Figure 28*



mfayturner@ic360.ca

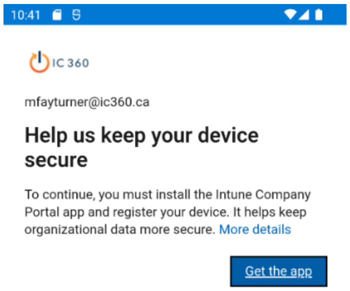
You can't get there from here

It looks like you're trying to open this resource with an app that hasn't been approved by your IT department. Ask them for a list of approved applications.

# Android Instructions

1) After downloading Outlook on your Android device, you will receive a prompt to get an additional application *(Figure 29).*
2) Click 'Get the app' and install the Intune Company Portal *(Figure 30).*
3) Follow prompts to configure the application *(Figure 31).*

*Figure 29*



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Help us keep your device secure

To continue, you must install the Intune Company Portal app and register your device. It helps keep organizational data more secure. More details

*Figure 30*

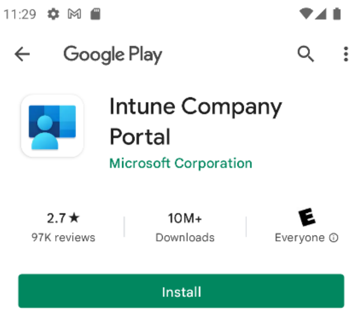
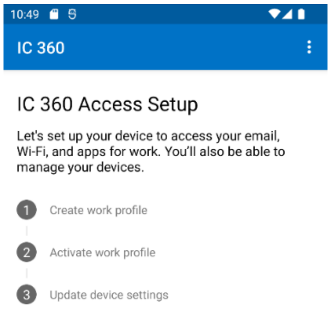


*Figure 31*



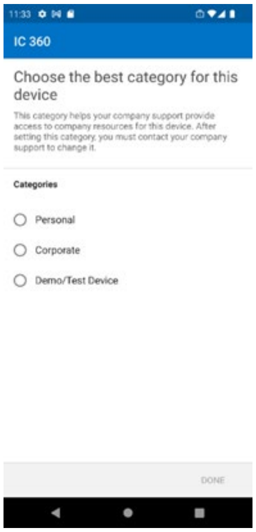
IC 360 Access Setup

Let's set up your device to access your email, Wi-Fi, and apps for work. You'll also be able to manage your devices.

1. Create work profile
2. Activate work profile
3. Update device settings

4) Choose the category for this device *(Figure 32)* and continue following the prompts *(Figure 33)* until you reach the 'Your new network setup' screen *(Figure 34*). You have successfully installed the Company Portal.

*Figure 32*



11:33

IC 360

Choose the best category for this device

This category helps your company support provide access to company resources for this device. After setting this category, you must contact your company support to change it.

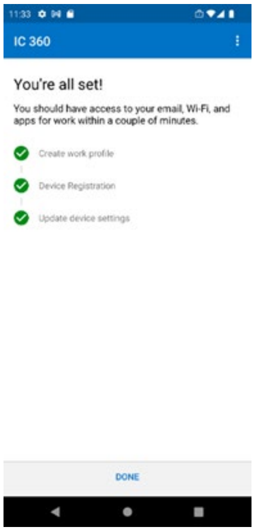
**Categories**

○ Personal

○ Corporate

○ Demo/Test Device

*Figure 33*



11:33

IC 360

You're all set!

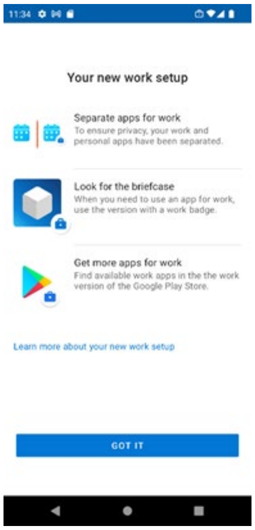
You should have access to your email, Wi-Fi, and apps for work within a couple of minutes.

✓ Create work profile

✓ Device Registration

✓ Update device settings

*Figure 34*



11:34

Your new work setup

Separate apps for work
To ensure privacy, your work and personal apps have been separated.

Look for the briefcase
When you need to use an app for work, use the version with a work badge.

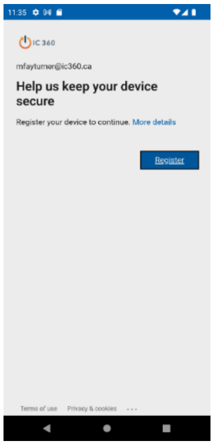
Get more apps for work
Find available work apps in the the work version of the Google Play Store.

Learn more about your new work setup

5) Reopen Outlook, and it will prompt you to register your device *(Figure 35).*

6) **Click register** and set a PIN *(Figures 36& 37)*. This PIN is different from your phone PIN and will be used to access your company resources.

*Figure 35*



11:35

IC 360

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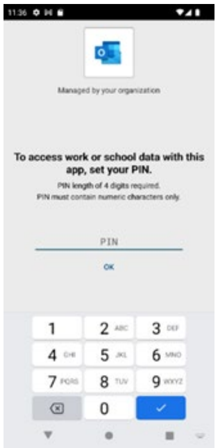
**Help us keep your device secure**

Register your device to continue. More details

*Figure 36*



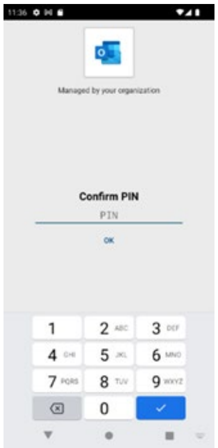
11:36

Managed by your organization

**To access work or school data with this app, set your PIN.**

PIN length of 4 digits required.
PIN must contain numeric characters only.

*Figure 37*



11:36

Managed by your organization

**Confirm PIN**