

ConnectWise Automate Administration

One-Time Environment Assessment & Optimization

PREREQUISITES*

To ensure that the on-boarding process goes as quickly and smoothly as possible, we require the following prerequisites are met:

- Current year Automate Server Version*
- MySQL Version 5.6.39
- Current year ConnectWise Control Version*
- Provide remote access to the Automate Server for the ProVal team (on-premise partners)

*We are happy to assist with updating the environment to meet these prerequisites. However, this process will increase the time needed to complete the on-boarding process and may increase the onboarding fee.

CONNECTWISE AUTOMATE

Server

- ConnectWise Automate hardware configuration based on vendor recommendation*
- Adjust SQL database my.ini file for appropriate RAM allocation and performance tweaks*
- Review of top ten database tables by size
- Automate branding including title, control center icon, splash picture tray text, service display name, and custom tray icon
- SSL configuration*
- Check nightly database backup*
- List of scripts scheduled to run/backlog and impact in environment
- Commands scheduled to run/backlog and impact in environment
- Applied Desktop/Laptop/Server Schedules for irregularities
- Failed emails review
- Active plugins and available solution center updates
- Perform a patch update to the Automate Server***
- Active Directory Plugin integration and training
- Active Directory LDAP configuration or SSO
- Onboarding and offboarding consulting (Process and customization)
- Provide access to the ProVal custom content library

* On Premise partners only

** Please review Prerequisite information above.

Environment Cleanup

- Report of missing drive count and automated removal via script
- Report of not currently detected roles and automated removal via script
- Cleanup and recommendations on removal of unused:
 - Groups
 - Searches
 - Scripts
 - Monitors

Users & Security

- List of users in Automate
- Last login date by user
- List of user classes assigned by user and users with Super Admin
- Current auditing taking place and audit level assigned by user
- 2-factor / multi-factor authentication audit / implementation
- LDAP/SSO Audit

Tickets

- Ticket Volume History
- Ticket Noise Analysis (recurring patterns, trends, duplicates)
- Automate to PSA integration (Syncing, category mapping, etc.)
- Best-practice ticket category mapping
- Old ticket removal from Automate database via script

MONITORING AND AUTOMATION

Workstations

- List of monitors which are enabled and actively monitoring workstations via Service Plan
- Configuration of best-practice monitors
- Review and removal of duplicate monitors
- Review of disabled & custom monitors
- Time sync to ConnectWise Manage on ~Autofix Monitors upon request

Servers

- List of monitors which are enabled and actively monitoring servers
- Configuration of best-practice monitors

- Removal of duplicate monitors
- Configuration of the Offline Server monitor
- Review of disabled & custom monitors
- Time sync to ConnectWise Manage on ~Autofix Monitors upon request

Global

- Review of existing global monitors
- Implementation of ProVal best-practice global monitors

Ignite Manager

- Implementation of the Ignite Manager plugin
- Configuration of the below management packs:
 - Core Services
 - Messaging
 - Network Port
 - Web/Proxy
 - Databases
- Configuration of management pack monitors based on best practices

Physical Servers (Dell and HP)

- Custom monitor to check for OEM server management software installation
- Custom monitor for Dell servers
- Custom monitor for HP Servers

Virtual Hosts (Virtualization Manager Plugin)

- Virtualization Manager Plugin is implemented and functional
- Configuration of Best-practice monitors with custom alert messaging
- Memory Usage
- Disk Space
- Disk Failures and Resets
- Power Failures and Restarts
- Network probe review to ensure that the probe will detect the ESXi host

Network Device Monitoring

- Network device detection implementation including Firewalls, Printers, Router/Bridge (Switch) Devices, Storage Devices, and UPS devices. (Client to provide object identifiers / management information base to ProVal Technologies)
- Network device up/down alerting configuration training
- Review of Network probes:
 - Deployment check and implementation (Client must provide necessary details)
 - Probe version check and upgrade, if necessary

WINDOWS PATCHING

- Review of existing patching metrics
- Report of existing patching configuration across clients
- Report of clients/agents with patching disabled
- Report of agents with number of missing patches
- Report of Patches Missing across agents and clients
- Report of patch counts in Approved/Denied/Not Set Statuses (Patch Manager)
- Implementation plan for patching strategy
- Windows 10 and 11 feature upgrade strategy review
- Configuration of Patch Manager
- Third Party Patching Configuration (currently supported solutions include ConnectWise and Ninite Solution)

ANTIVIRUS

- List of agents with or without antivirus installed
- List of agents with outdated antivirus definitions
- Check if Antivirus plugin is installed if available
- Configuration of officially supported AV plugins
- Update Automate antivirus definitions from the Solution Center

TRAINING

One training session, up to two-hours, recorded for technicians covering the following:

- Tips & tricks on how to avoid end-user interruption using Automate
 - ConnectWise Automate Control Center & Computer Management screen
 - Automate & Control web-portal training
 - Training on ProVal content loaded in environment

CONNECTWISE CONTROL

Server and Configuration

Review, remediation, and/or implementation of the following:

- Review current patch version and update if necessary*
- SSL Configuration*
- Best-practice extensions
- User account review
- Permission review and adjustments
- ConnectWise Home SSO Integration
- Session group creation
- Best-practice configuration options:
 - Disable technician surveys on disconnect
 - Idle-time lockouts
 - Auto-consent time
 - Stale connection clean-up
 - 2 FA audit
 - Branding review and implementation

* On Premise partners only

Control Integration (with Automate)

Review, remediation, and/or implementation of the following:

- ConnectWise Control Dashboard plugin is functional and connected
- Update plugin to the newest version

PROVAL CUSTOM CONTENT (SCRIPTS, MONITORS, DATAVIEWS, & OTHER)

As part of this on-boarding deliverable, the client is entitled to pre-developed scripts, monitors, dataviews, roles, and other CW Automate related content. This content is imported into the customer environment during on-boarding; ProVal will not change/remove/support any of this content in the case our partnership is discontinued.

Additional Notes:

Monthly ConnectWise Automate Administration (On-going)

PROVAL RESPONSIBILITIES

- Perform Microsoft patch approval / denial as per ProVal Tech standard policy
- RMM Software Patch Installation and Upgrades
- Plugin / Extension Updates
- Add/Change/Delete and troubleshooting/support requests related to RMM
 - Control Center
 - Network Probe
 - Monitor Sets / Alerting and Ticketing
 - Application Whitelisting / Blacklisting
 - User / Group / Searches / Computer Management
 - Patch Manager Adjustments
 - ConnectWise Manage and Control Plugins
 - ConnectWise Control Portal
 - Official Product integration support
- Monthly Consulting Call
- RMM Training
- Custom Development Requests:
 - RMM Script development
 - PowerShell development
 - SQL Development relating to the RMM
 - Dataview Development
 - End-client on-boarding / off-boarding

RMM APPLICATION / DATABASE MONITORING*

As part of our offering, the ProVal Centralized Services platform monitors the client RMM application for critical events. This does require installation / communication of our monitoring agent on the client RMM server(s) or an available device that can effectively run the server monitoring.

PSA/Ticketing System Integration

Our monitor will check once a day to confirm that API keys and integration users are set up as well as confirm that data is flowing by scanning the settings and logs contained in the database. If we receive

an alert, it will be routed to our RMM Admin Team where settings will be confirmed, and the client will be contacted if any assistance is needed for remediation. (Note: if there are no plugin tables found we will assume the plugin is not installed).

RMM Web Portal

Our monitor will check every 15 minutes the status of the web portal for your RMM and confirm that its up and not reporting any errors. Any errors here will quickly indicate an issue with web server which would cause problems with agent check ins. These alerts will be routed to our RMM Admin Team where they will connect to your server and investigate any issues with web server. If we are unable to restore services, we will alert the client as well as start a support case at the highest priority as this would fall under server down.

Database Backups

Our Monitor will check once a day and confirm the location of the RMM database and that it is backing up. It will then determine if the backup is recent. If a backup is not found or the backup is older than 24 hours an alert will be generated for our RMM Admin Team to review.

Disabled Monitors

Our Monitor will check once a day in the database for internal monitors that have timed out and been disabled. Disabled monitors can lead to missed alerts. If troublesome monitors are found an alert will be generated for our RMM Admin Team to review.

Failed Emails

Our Monitor will check once a day to confirm that your RMM has not stopped sending emails. If failed emails are found an alert will be generated for our RMM Admin Team to review.

Available Licenses

Our monitor checks at the start of each week and will alert if your available licenses are getting too low.

Additional Notes:

- ProVal will begin billing for support services 30 days after the service start date. ProVal will be unable to support any new requests until the onboarding project is complete.
- Custom development requests are performed at the ProVal team's discretion and may require a separate scope of work and fee depending on complexity. All custom requests submitted to ProVal Tech will be analyzed by the primary consultant and put into development queue. ProVal Tech is unable to provide a defined SLA on completion of custom requests. The primary consultant can provide a timeline based on the complexity of the request.

- Any custom development request estimated to take longer than 10 hours to deliver will be considered out of scope and may be billed separately.
- ProVal's service team members are full-time company employees located in the US and India. Support requests are handled by the global team based on availability, skillsets, and business requirements. Any client-specific compliance requirements should be communicated with our services teams at commencement of engagement.

Your Investment

DESCRIPTION	SUBTOTAL
ConnectWise Automate Administration Onboarding (One Time)	\$5,000
ConnectWise Automate Administration Services (Monthly)	\$2,750

Secondary RMM Instance: If your organization has multiple instances of CW Automate, an additional charge of \$1,000 per month applies for the management of each additional instance

Payment & agreement schedule shall be as follows:

Onboarding Fee: One-time fee due in full at contract signing.

Monthly Charges: Billed on the 1st of every month in advance and payable in 7 days via ACH. Prior to the start of service, ProVal Tech requires client to complete an ACH Authorization form for recurring monthly charges. If client is unwilling/unable to provide a completed ACH form, ProVal Tech requires client to provide payment / deposit for the last month of service prior to initiating services.

Agreement Terms: 3 months from service start date, renewed automatically in 30-day increments. Client can cancel with a 30-day written notice at any time after the initial commitment.

All fees not paid by the applicable due date shall be subject to a monthly service charge of 1.5% of the unpaid balance of the outstanding invoice. In the event that ProVal shall be forced to incur fees in the collection of an unpaid balance, ProVal shall be entitled to reimbursement of its costs and attorney’s fees from the Client. ProVal maintains the right to suspend service to the client in case any invoice is unpaid for more than 30 days.

Monthly service fees are subject to revision after completion of every 12 months of service.

Monthly service fees are subject to revision if ConnectWise Automate endpoint count exceeds 5,000 endpoints.

30-Day Money Back Guarantee: If client is dissatisfied with the program for reasons related to ProVal's quality of service, the client may terminate the agreement and obtain a refund of the amount paid for the program, provided that client notifies ProVal Tech within 30 days of service start date. ProVal Technologies reserves the right to request reasonable evidence of dissatisfaction (Customer Satisfaction Surveys, email communications between ProVal and the client, etc) to process the request.

Credit card payment are subject to additional 3% processing fee.