



**Technology Business
Review**

Prepared for

ABC Wealth

March 1, 2024



Technology Business Review for ABC Advisors

Prepared by: David Kakish

Date: March1, 2024

Category		Comments
Cloud Platform		
Platform	✓	On RIA Workspace Platform with Advance Security powered by Microsoft
Secure Single Sign On (SSO)	✓	Are you currently using SSO to access your cloud applications in a secure and compliant way
Data - Retention	!	Are you currently using any Retention Policy such as Keep Content Forever with Preservation Lock on
Real Time Document Collaboration	!	Do you have the ability for two or more people to collaborate in real time in the same document?
Email Infrastructure		
Mail Server/Email	✓	Hosted Microsoft Exchange in good working order.
Email - Multi-factor Authentication	✓	Is Multi-factor Authentication is turned on?
Email - Antivirus & Antispam Standard	✓	Email system has antivirus and antispam in place
Email - Advanced Threats	!	Microsoft Defender For Office 365 is in place
Email - Encryption	✓	Are you Encrypting emails that contain sensitive information in the environment
Email - DLP	!	Data Loss Prevention is in place for U.S. Financial Data and U.S. Personally Identifiable Information (PII) Data
Email - Retention	!	Are you currently using any Retention Policy such as Keep Content Forever with Preservation Lock on
Email - Auditing	!	Is it active and functional
Email - Simulated Phishing Campaigns	!	Monthly phishing campaigns
Teams Messaging - Retention	!	You are currently using Retention Policy with Keep Content Forever with Preservation Lock on
Network (WAN & LAN)		
Internet Access	✓	Cogent primary internet line
Backup Internet Line	!	Failover line is configured and tested
Switches	✓	Good Health
Wireless Access Points	✓	They have separate Employee and Guest Access
Desktops	✓	All computers are running the latest version of windows
Patch Status	✓	Over 80% Patched



Technology Business Review for ABC Advisors

Prepared by: David Kakish

Date: March 1, 2024

Category		Comments
Cybersecurity & IT Compliance		
Firewall	✓	Good Health
Firewall Warranty	!	Warranty is valid through 12/31/2021
Network Firewall Security	!	Do you have Firewall Security Services?
Modern Remote Access	✓	Uses the Microsoft Active Directory Services so Team is able to work and be fully productive when outside the office
Computer Encryption	✓	All computers are encrypted especially now that employees are working from home
Removable Media Control (USB Block)	!	Is this in place?
Antivirus, Identity & Endpoint Protection	!	Microsoft Defender For Endpoint, Microsoft Defender For Office 365 and Microsoft Defender For Identity is in place
Extended Detection & Response (XDR)	✓	We have Microsoft XDR implemented for your RIA
Mobile Device Compliance	!	Do iPhones and mobile devices meet your RIA's IT and security requirements before accessing company resources?
Internet Filtering/Reporting	✓	Internet filtering is in place using the Microsoft Defender for Endpoint
External Penetration Test & Vulnerability Scan	✓	We test two times per year. Think of it as a semi-annual fire drill
Security Awareness Training	✓	Great you have PII Protect in place to train your staff on best security practices Click here for more information
Templates - IT Policies & Best Practices	!	For New Employee Form, internet policy and more Click Here for Templates
Back Up & Disaster Recovery		
Written Plan	✓	Appendix A - Click Here
Communication	✓	Appendix B - Click Here
Automate Backups	✓	All backups are automated to minimize human error. InhouseCIO gets alerted when there is an error and immediately looks into the issue
Offsite Disaster Recovery/Replication	✓	Your data is being backed up to the data center
Backup/DR Testing	!	We test two times per year. Think of it as a semi-annual fire drill
Business Topics		
Network Documentation	✓	Documented by InhouseCIO. Can provide a copy to key contacts
Expansion / Growth	!	How are you doing, are you looking at adding new people, new companies or new technologies
Other		



Technology Business Review for ABC Advisors

Prepared by: David Kakish

Date: March1, 2024

Comments		
Client Relationship		
"ABC Advisors" News - What's new at your company that we should be aware of or keep in mind?		
If we were meeting one year from today—and you were to look back over that year to today —what has to have happened during that period, from a technology perspective for you to feel happy about your progress?		
What do you like most about our services and what are the biggest benefits received since hiring us?		
Where can we improve?		
Are there other services would you like to see us offer?		
Questions/Comments		
Action Items		

DLP Policies

U.S. Financial Data

Description

Helps detect the presence of information commonly considered to be financial information in United States, including information like credit card, account information, and debit card numbers.

Protects this information:

Credit Card Number

U.S. Bank Account Number

ABA Routing Number

U.S. Personally Identifiable Information (PII) Data

Description

Helps detect the presence of information commonly considered to be personally identifiable information (PII) in the United States, including information like social security numbers or driver's license numbers.

Protects this information:

U.S. Individual Taxpayer Identification Number (ITIN)

U.S. Social Security Number (SSN)

U.S. / U.K. Passport Number

Computer Name	User	OS
Norman's MacBook Pro M1	ABC User - 1	macOS 14.1.0 (Darwin)
Matt's MacBook Pro	ABC User - 2	macOS 13.5.1 (Darwin)
ZIPDEV	ABC User - 3	Microsoft Windows 11 Enterprise x64
ABC-LT013	ABC User - 4	Microsoft Windows 11 Enterprise x64
ABC-LT011	ABC User - 5	Microsoft Windows 11 Enterprise x64
ABC-LT010	ABC User - 6	Microsoft Windows 11 Enterprise x64
ABC-LT009	ABC User - 7	Microsoft Windows 11 Enterprise x64
ABC-LT008	ABC User - 8	Microsoft Windows 11 Enterprise x64
ABC-LT007	ABC User - 9	Microsoft Windows 11 Enterprise x64
ABC-LT006	ABC User - 10	Microsoft Windows 11 Enterprise x64
ABC-LT005	ABC User - 11	Microsoft Windows 11 Enterprise x64
ABC-LT004	ABC User - 12	Microsoft Windows 10 Enterprise x64
ABC-LT003	ABC User - 13	Microsoft Windows 11 Enterprise x64
ABC-LT003	ABC User - 14	Microsoft Windows 11 Enterprise x64
ABC-LT002	ABC User - 15	Microsoft Windows 11 Enterprise x64
ABC-LT001	ABC User - 16	Microsoft Windows 11 Enterprise x64



Asset Summary Report

Displays a summary of all assets for each client, followed by detailed lists grouped by each device type.

Asset Summary Report



February 15, 2024

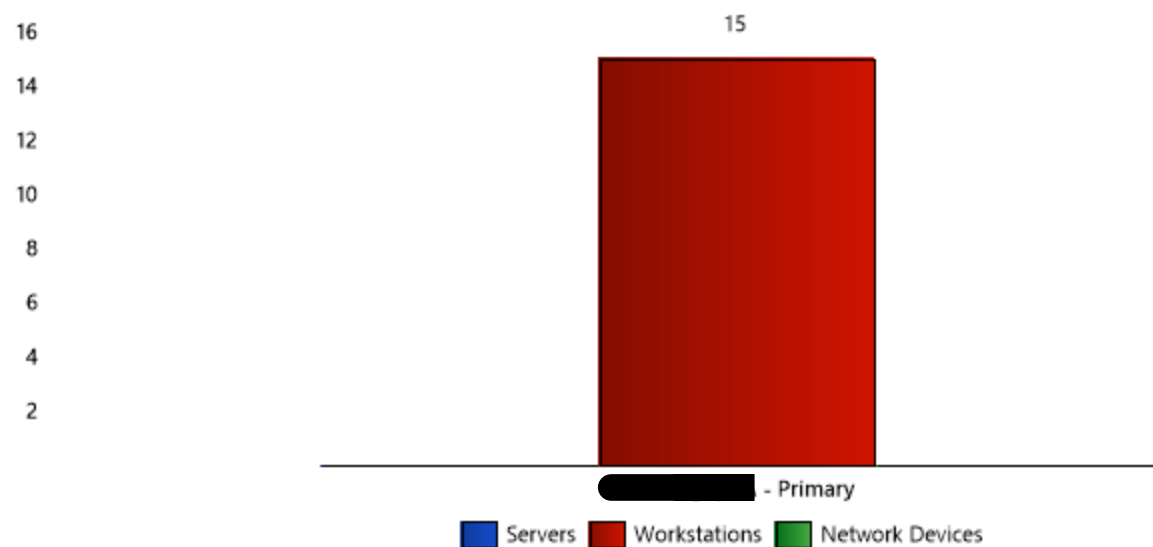
ABC Wealth

Address: 123 Main Street
Anywhere, XO 55555
Country: United States
Phone: 555-555-5555
Fax: 555-555-5555
Locations: 1

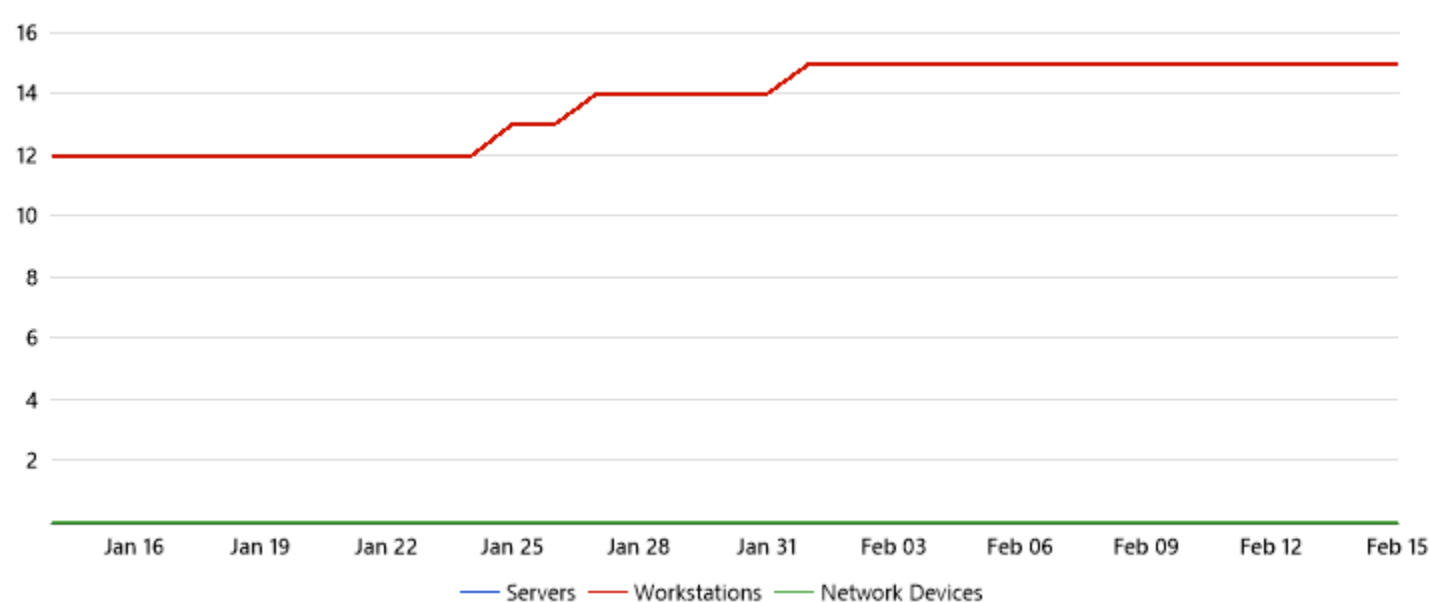
Asset Analysis

Servers	Workstations	Network Devices
0	15	0
Servers	Windows	Other
Workstations	0	0
	13(87%)	2 (13%)

Devices By Location



Asset Deployment History



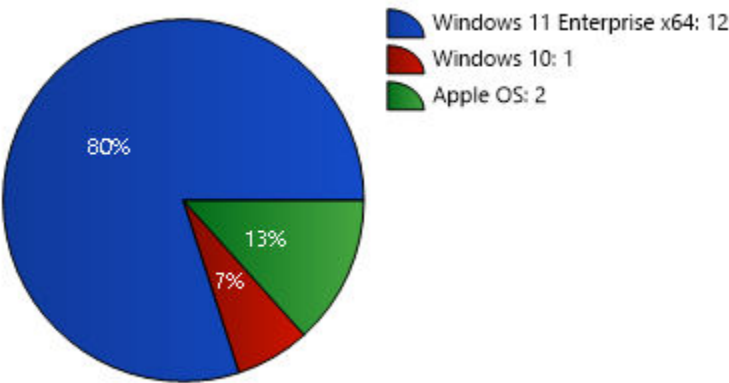
Asset Summary Report



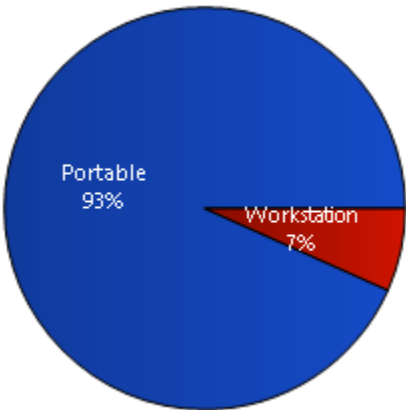
February 15, 2024







Workstation Assets

Workstations by Operating Systems



Workstation Form Factor



Workstation Type/Name		Current Status/Duration		CPU Usage		RAM Usage		HDD Usage	
Location		OS		Local IP					
Manufacturer/Model				Assigned Contact				Date 1st OS Start	
 ABC-LT001		Running for 3h 30m		2.67 GHz		15.8 GB		187 GB / 953 GB	
Anywhere, XO - Primary	Windows 11	10.1.10.193		<div><div></div></div> 7%	<div><div></div></div> 75%	<div><div></div></div> 20%			
Enterprise x64 x64									
ASUSTeK COMPUTER INC. ZenBook UX563FD_Q547FD				John				06-Mar-2023	
 ABC-LT002		Running for 2d 1h		1.98 GHz		15.7 GB		104 GB / 475 GB	
Anywhere, XO - Primary	Windows 11	192.168.1.101		<div><div></div></div> 1%	<div><div></div></div> 61%	<div><div></div></div> 22%			
Enterprise x64 x64									
ASUSTeK COMPUTER INC. ASUS EXPERTBOOK B1500CBA_B1500CBA				Barbara				24-May-2023	
 ABC-LT003		Running for 1d 20h		3.07 GHz		15.8 GB		151 GB / 1.14 TB	
Anywhere, XO - Primary	Windows 11	192.168.1.241		<div><div></div></div> 8%	<div><div></div></div> 97%	<div><div></div></div> 13%			
Enterprise x64 x64									
ASUSTeK COMPUTER INC. ZenBook UX535LH_UX535LH				Stephanie				14-Feb-2023	
 ABC-LT004		Running for 20d 2h		3.07 GHz		15.8 GB		109 GB / 1.14 TB	
Anywhere, XO - Primary	Windows 10 x64	192.168.1.153		<div><div></div></div> 6%	<div><div></div></div> 69%	<div><div></div></div> 9%			
ASUSTeK COMPUTER INC. ZenBook UX535LH_UX535LH				Hannah				27-Sep-2022	
 ABC-LT005		Running for 2h 38m		2.8 GHz		15.7 GB		196 GB / 475 GB	
Anywhere, XO - Primary	Windows 11	192.168.0.23		<div><div></div></div> 7%	<div><div></div></div> 69%	<div><div></div></div> 41%			
Enterprise x64 x64									
ASUSTeK COMPUTER INC. Zenbook UX5400EG_UX5400EG				Jenna				12-Apr-2023	
 ABC-LT006		Running for 4h 31m		2.8 GHz		15.7 GB		198 GB / 475 GB	
Anywhere, XO - Primary	Windows 11	10.0.0.91		<div><div></div></div> 9%	<div><div></div></div> 84%	<div><div></div></div> 42%			
Enterprise x64 x64									
ASUSTeK COMPUTER INC. Zenbook UX5400EG_UX5400EG				Sara				18-Apr-2023	

Asset Summary Report





February 15, 2024




<input type="checkbox"/> Workstation Type/Name	Current Status/Duration		CPU Usage	RAM Usage	HDD Usage
Location	OS	Local IP	Assigned Contact		Date 1st OS Start
Manufacturer/Model					
ABC-LT007	Running for 2h 33m		2.57 GHz	15.8 GB	163 GB / 1.14 TB
Anywhere, XO - Primary	Windows 11	192.168.1.176	<div><div></div></div> 1%	<div><div></div></div> 78%	<div><div></div></div> 14%
Enterprise x64 x64					
ASUSTeK COMPUTER INC. ZenBook UX535LH_UX535LH			Danielle		23-May-2023
ABC-LT008	Running for 13d 20h		3.96 GHz	15.7 GB	84 GB / 475 GB
Anywhere, XO - Primary	Windows 11	172.20.5.177	<div><div></div></div> 3%	<div><div></div></div> 72%	<div><div></div></div> 18%
Enterprise x64 x64					
ASUSTeK COMPUTER INC. ASUS EXPERTBOOK B1500CBA_B1500CBA			Steinar		20-Sep-2023
ABC-LT009	Running for 20d 1h		3.86 GHz	15.7 GB	108 GB / 475 GB
Anywhere, XO - Primary	Windows 11	10.0.0.249	<div><div></div></div> 11%	<div><div></div></div> 78%	<div><div></div></div> 23%
Enterprise x64 x64					
ASUSTeK COMPUTER INC. ASUS EXPERTBOOK B1500CBA_B1500CBA			Nicole		21-Dec-2023
ABC-LT010	Running for 13d 4h		3.07 GHz	15.8 GB	114 GB / 1.14 TB
Anywhere, XO - Primary	Windows 11	192.168.1.8	<div><div></div></div> 13%	<div><div></div></div> 69%	<div><div></div></div> 10%
Enterprise x64 x64					
ASUSTeK COMPUTER INC. ZenBook UX535LH_UX535LH			Christopher		22-Sep-2022
ABC-LT011	Running for 3h 44m		2.47 GHz	15.6 GB	91 GB / 475 GB
Anywhere, XO - Primary	Windows 11	192.168.0.139	<div><div></div></div> 4%	<div><div></div></div> 57%	<div><div></div></div> 19%
Enterprise x64 x64					
ASUSTeK COMPUTER INC. ASUS EXPERTBOOK B1502CBA			Unassigned		25-Jan-2024
ABC-LT-013	Running for 7d 4h		1.98 GHz	15.6 GB	70 GB / 475 GB
Anywhere, XO - Primary	Windows 11	192.168.0.91	<div><div></div></div> 1%	<div><div></div></div> 69%	<div><div></div></div> 15%
Enterprise x64 x64					
ASUSTeK COMPUTER INC. ASUS EXPERTBOOK B1502CBA			Unassigned		01-Feb-2024
Matt's MacBook Pro	Disconnected for 7d 21h		Unknown	33.6 GB	1.96 TB / 3.15 TB
Anywhere, XO - Primary	macOS 13.5.1	192.168.68.117	<div><div></div></div> 58%	<div><div></div></div> 61%	<div><div></div></div> 62%
(Darwin)					
Apple Inc. MacBookPro18,1			Matt		
Norman's MacBook Pro M1	Running for 2h 37m		Unknown	16.8 GB	4.61 TB / 5.41 TB
Anywhere, XO - Primary	macOS 14.3.1	192.168.68.78	<div><div></div></div> 23%	<div><div></div></div> 61%	<div><div></div></div> 85%
(Darwin)					
Apple Inc. MacBookPro18,1			Norman		
ZIPDEV	Running for 6d 22h		3.4 GHz	15.7 GB	59 GB / 476 GB
Anywhere, XO - Primary	Windows 11	192.168.1.24	<div><div></div></div> 4%	<div><div></div></div> 65%	<div><div></div></div> 12%
Enterprise x64 x64					
STRONG TECH N156DRP			Unassigned		26-Jan-2024

Report Legend

Server Type Indicators






-  Server (All types)
-  Virtual Machine (VMWare/VirtualBox)

Workstation Type Indicators







-  Desktop (Tower/Minitower)
-  Portable (Notebook/Netbook)
-  Virtual Machine (VMWare/VirtualBox)

Agent Status Colors

The color of the Agent Status field indicates what type of connection is currently maintained by the server:




-  Running
-  Lost Contact
-  Disconnected
-  Standby / Hibernate
-  Shutdown

Network Device Type Indicators

-  General Network Device
-  Bridge
-  Camera/Scanner
-  Computer (No Agent)
-  Firewall Device
-  Home Automation Device
-  Multimedia Device
-  Network Attached Storage
-  Programmable Logic Controller
-  Printer
-  Router
-  Switch
-  Terminal
-  Uninterruptible Power Supply
-  VoIP Device
-  Wi-Fi Access Point

Resource Usage Indicator

These bars display the percentage of resources used for a given item. To the right is the scale commonly used; note that certain items may have a reversed scale.

-  Low: 0% up to 50%
-  Medium: 50% up to 75%
-  High: 75% up to 100%



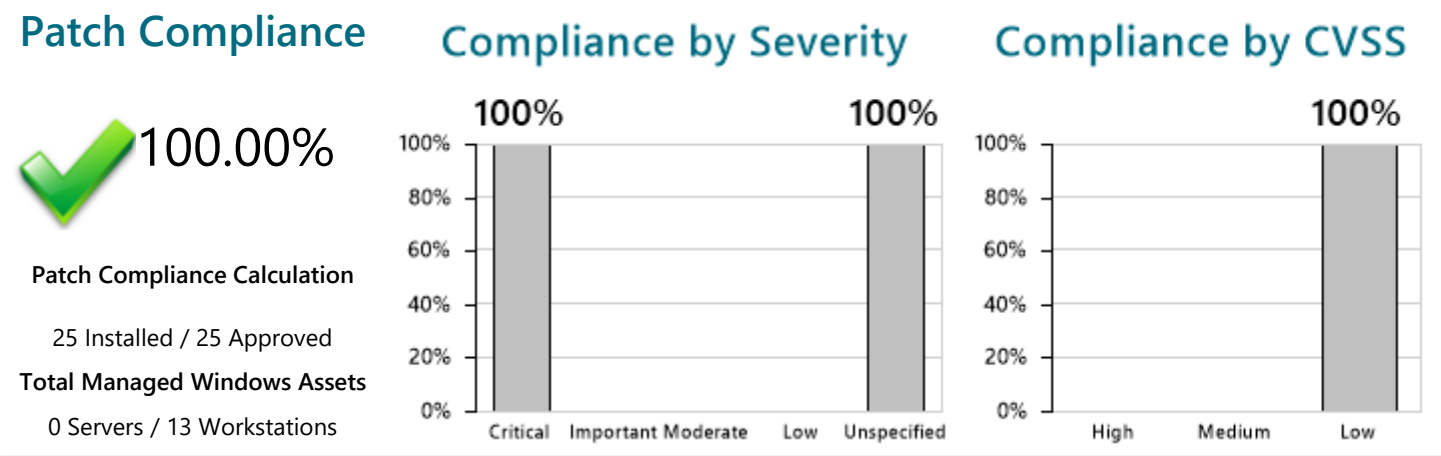
Patch Compliance

Displays the patch compliance of your systems, and details each device and patch that is non-compliant.

Patch Compliance



ABC Wealth; February 15, 2024



Non-Compliant Devices

Location\Computer	Operating System	Patch Compliance	I / NA / F	Last Patched	Last Scanned	Patch Status
-------------------	------------------	------------------	------------	--------------	--------------	--------------

Non-Compliant Patches

Patch Title & KB Article	Operating System	Category	Severity	CVSS	Release Date	F	NA
All Patches are Compliant							

Report Legend

Patch Compliance Indicator

Represents the percentage of the number of patches installed on the system vs. the number of patches approved for installation based on patch policies. The thresholds for the indicator is determined based on the following ranges:



Compliant: 80% to 100%



Needs Review: 60% up to 80%



Not Compliant: 0% up to 60%

Patch Compliance by Severity

This chart displays the percentage of patches that have been successfully installed within the severity level, separated into series of patch severity (as categorized by Microsoft).

Patch Compliance by CVSS Score

This chart displays the percentage of patches that have been successfully installed within each CVSS level, separated into series of CVSS scores (as categorized by NIST).

Non-Compliant Devices

Displays a list of devices that are at risk due to a non-compliant configuration. Each device displays its name and location; operating system installed; percentage of patch compliance (with a bar to visualize the percentage); the number of patches Installed, Not Attempted, and Failed (labelled as I / NA / F); the date the device was last patched; the date the device was last scanned; and current compliance status.

Device Compliance Status

Devices can display different compliance statuses due to the following risks:

Outdated Patch Inventory

The patch inventory has not been updated in the last 30 days.

Pending Reboot

The computer may require a reboot in order to complete installation of patches.

Agent Offline

The computer has not been contacted within the last 15 days and may require patches installed.

Missing Patches

The computer is missing one or more patches due to either a patch that has not yet attempted to install.

Failed Patches

The computer is missing one or more patches due to one or more failed installation attempts.

Non-Compliant Patches

Displays a list of patches that are not fully distributed to approved devices. Each patch displays its title and KB article ID; operating system that the patch applies to; Microsoft's patch category and severity level; NIST's CVSS score level; date patch was released; and number of devices that the patch has not yet attempted to install or failed to install (labelled as NA and F, respectively).



**Backup Audit Report
Prepared by
InhouseCIO for ABC
Wealth
March / 2024**

Contents

Where are backups kept?	3
What is backed up?.....	3
When is it backed up? How often?	3
How many versions/copies of a document are kept?	4
Proof of valid backups.....	5
Proof of Restored Backup Testing.....	7

Where are backups kept?

Microsoft 365 environment

What is backed up?

The following locations are included:

- Exchange mailboxes
- OneDrive accounts
- SharePoint classic and communication sites
- Microsoft 365 Group mailboxes & sites
- Teams channel messages
- Teams chats and Copilot interactions.

When is it backed up? How often?

Several situations generate a backup:

- When a list item or file is first created or when a file is uploaded.
- When a file is uploaded that has the same name as an existing file.
- When the properties of a list item or file are changed.
- When an Office document is opened and saved. After a document is opened again, a new version will be created after an edit is saved.
- Periodically, when editing and saving Office documents. Not all edits and saves create new versions. When saving edits frequently, for example, each new version captures a point in time rather than each individual edit. This is common when autosave is enabled.
- During co-authoring of a document, when a different user begins working on the document or when a user clicks save to upload changes to the library.

How many versions/copies of a document are kept?

- Keep the following number of major versions: 500 versions.
- Retention forever (more details below)

Backup: There are two types of backup running

1. Site Level

- This is called Auto versioning you can store, track, and restore items in a list and files. Versioning, combined with other settings, such as checkout, gives you a lot of control of the content that is posted on your site and can provide real value if you ever need to look at or restore an old version of an item or file.
- You can set unlimited versions that allow you to restore files from last year's deleted versions that will go to the Recycle Bin.

2. Tenant Level:

- Microsoft backup every 12 hours and data is kept for 14 days, and you can request a site to be restored.

Archive: Working as below:

Retention Policy follows two Paths:

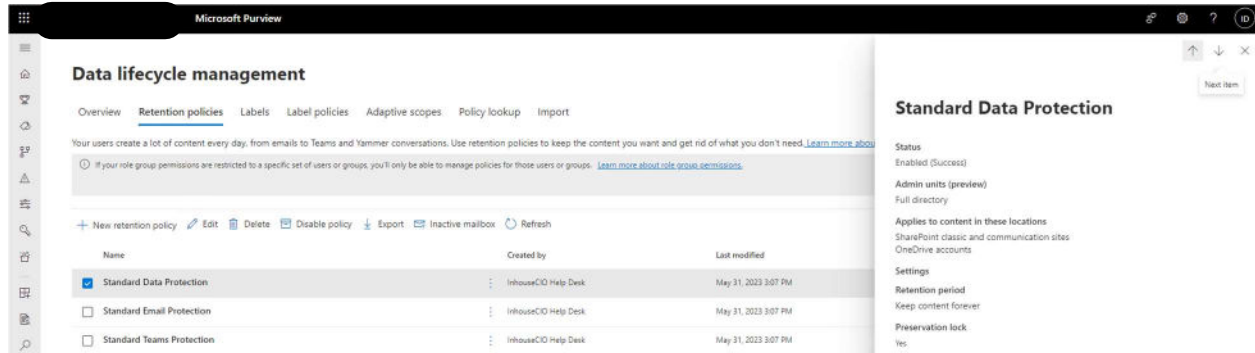
- If the data is deleted or modified:
 - A copy of the data will be placed on the Preservation Hold Library
 - A timer job that runs periodically will identify which files/folder retention period has expired.
 - Files/Folders are permanently deleted within seven days at the end of the retention period.
- If the data is not deleted or modified:
 - Data will move to the First Stage Recycle bin at the end of the retention period.
 - If the data is emptied from the Recycle bin, the Data is moved to the Second Stage Recycle bin.
 - After 93 days data will be permanently deleted

How does versioning work in a SharePoint list or library?

[Click Here](#)

Proof of valid backups

Retention policies



Microsoft Purview

Data lifecycle management

Overview **Retention policies** Labels Label policies Adaptive scopes Policy lookup Import

Your users create a lot of content every day, from emails to Teams and Yammer conversations. Use retention policies to keep the content you want and get rid of what you don't need. [Learn more about...](#)

ⓘ If your role group permissions are restricted to a specific set of users or groups, you'll only be able to manage policies for those users or groups. [Learn more about role group permissions.](#)

+ New retention policy Edit Delete Disable policy Export Inactive mailbox Refresh

Name	Created by	Last modified
<input checked="" type="checkbox"/> Standard Data Protection	InhouseCIO Help Desk	May 31, 2023 3:07 PM
<input type="checkbox"/> Standard Email Protection	InhouseCIO Help Desk	May 31, 2023 3:07 PM
<input type="checkbox"/> Standard Teams Protection	InhouseCIO Help Desk	May 31, 2023 3:07 PM

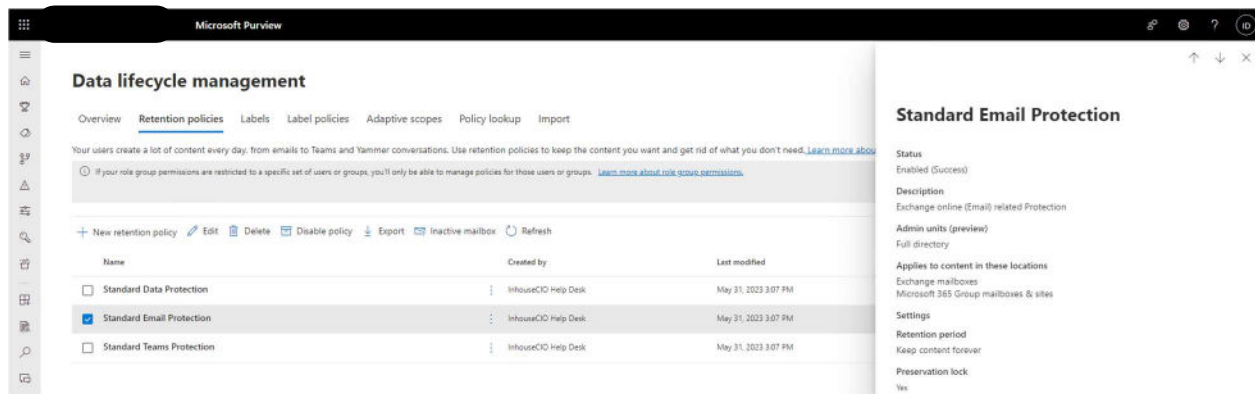
Standard Data Protection

Status: Enabled (Success)

Admin units (preview): Full directory

Applies to content in these locations: SharePoint classic and communication sites, OneDrive accounts

Settings: Retention period: Keep content forever, Preservation lock: Yes



Microsoft Purview

Data lifecycle management

Overview **Retention policies** Labels Label policies Adaptive scopes Policy lookup Import

Your users create a lot of content every day, from emails to Teams and Yammer conversations. Use retention policies to keep the content you want and get rid of what you don't need. [Learn more about...](#)

ⓘ If your role group permissions are restricted to a specific set of users or groups, you'll only be able to manage policies for those users or groups. [Learn more about role group permissions.](#)

+ New retention policy Edit Delete Disable policy Export Inactive mailbox Refresh

Name	Created by	Last modified
<input type="checkbox"/> Standard Data Protection	InhouseCIO Help Desk	May 31, 2023 3:07 PM
<input checked="" type="checkbox"/> Standard Email Protection	InhouseCIO Help Desk	May 31, 2023 3:07 PM
<input type="checkbox"/> Standard Teams Protection	InhouseCIO Help Desk	May 31, 2023 3:07 PM

Standard Email Protection

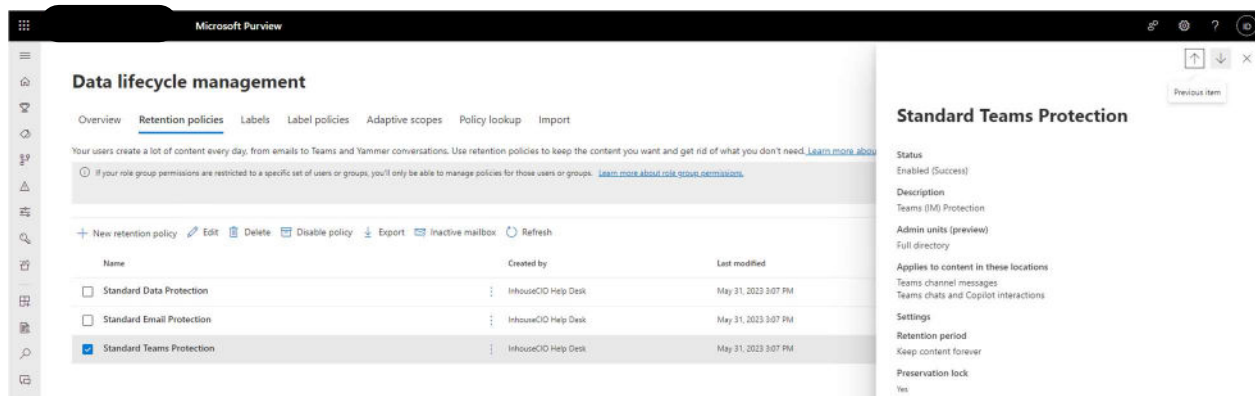
Status: Enabled (Success)

Description: Exchange online (Email) related Protection

Admin units (preview): Full directory

Applies to content in these locations: Exchange mailboxes, Microsoft 365 Group mailboxes & sites

Settings: Retention period: Keep content forever, Preservation lock: Yes



Microsoft Purview

Data lifecycle management

Overview **Retention policies** Labels Label policies Adaptive scopes Policy lookup Import

Your users create a lot of content every day, from emails to Teams and Yammer conversations. Use retention policies to keep the content you want and get rid of what you don't need. [Learn more about...](#)

ⓘ If your role group permissions are restricted to a specific set of users or groups, you'll only be able to manage policies for those users or groups. [Learn more about role group permissions.](#)

+ New retention policy Edit Delete Disable policy Export Inactive mailbox Refresh

Name	Created by	Last modified
<input type="checkbox"/> Standard Data Protection	InhouseCIO Help Desk	May 31, 2023 3:07 PM
<input type="checkbox"/> Standard Email Protection	InhouseCIO Help Desk	May 31, 2023 3:07 PM
<input checked="" type="checkbox"/> Standard Teams Protection	InhouseCIO Help Desk	May 31, 2023 3:07 PM

Standard Teams Protection

Status: Enabled (Success)

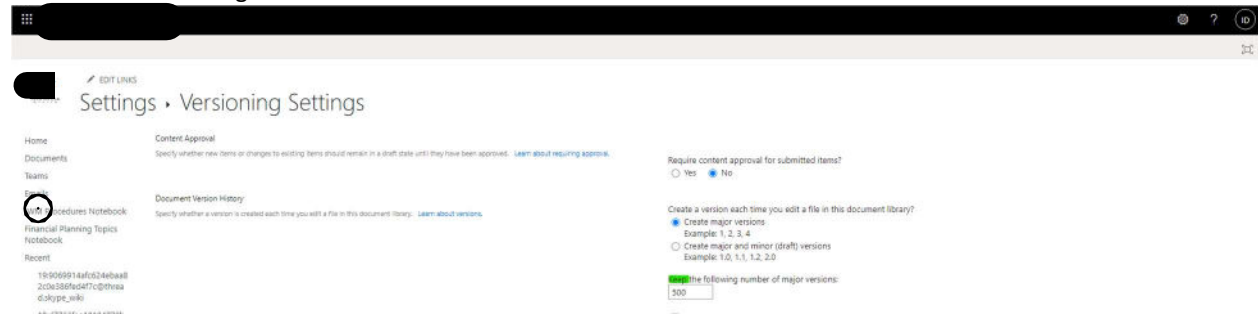
Description: Teams (IM) Protection

Admin units (preview): Full directory

Applies to content in these locations: Teams channel messages, Teams chats and Copilot interactions

Settings: Retention period: Keep content forever, Preservation lock: Yes

SharePoint versioning



Settings • Versioning Settings

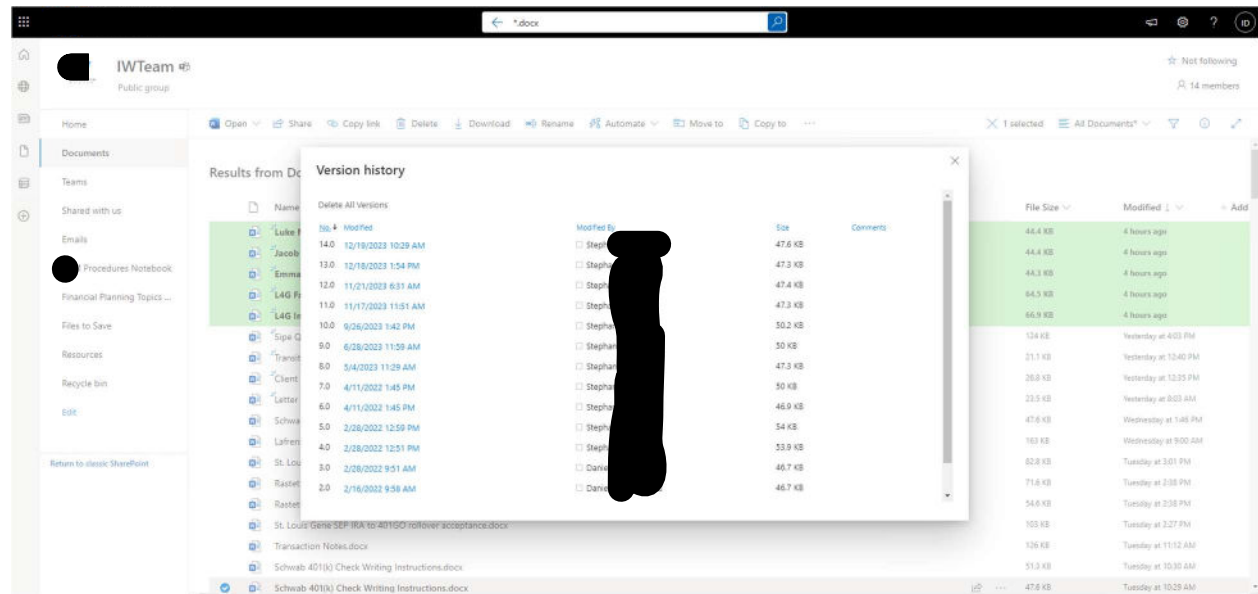
Content Approval
Specify whether new items or changes to existing items should remain in a draft state until they have been approved. [Learn about requiring approval.](#)

Document Version History
Specify whether a version is created each time you edit a file in this document library. [Learn about versions.](#)

Require content approval for submitted items?
☐ Yes ☒ No

Create a version each time you edit a file in this document library?
☒ Create major versions
 Example: 1, 2, 3, 4
☐ Create major and minor (draft) versions
 Example: 1.0, 1.1, 1.2, 2.0

Specify the following number of major versions:



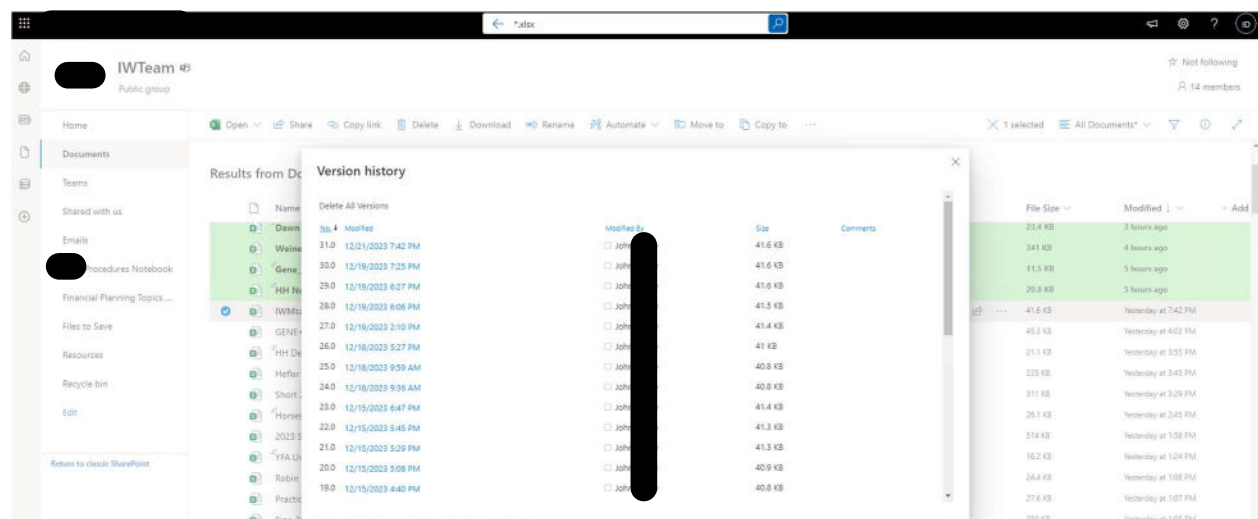
Results from Document Library: door

Version history

Name	Modified	Size	Comments
14.0	12/18/2023 10:29 AM	47.6 KB	
13.0	12/18/2023 1:54 PM	47.3 KB	
12.0	11/21/2023 6:37 AM	47.4 KB	
11.0	11/17/2023 11:51 AM	47.3 KB	
10.0	9/26/2023 1:42 PM	50.2 KB	
9.0	6/26/2023 11:59 AM	50 KB	
8.0	5/4/2023 11:29 AM	47.3 KB	
7.0	4/11/2023 1:45 PM	50 KB	
6.0	4/11/2023 1:45 PM	46.9 KB	
5.0	2/28/2023 12:59 PM	54 KB	
4.0	2/28/2023 12:51 PM	53.9 KB	
3.0	2/28/2023 9:51 AM	46.7 KB	
2.0	2/16/2023 9:58 AM	46.7 KB	

File Size Modified Add

44.4 KB	4 hours ago	
44.4 KB	4 hours ago	
44.3 KB	4 hours ago	
64.5 KB	4 hours ago	
66.9 KB	4 hours ago	
134 KB	Yesterday at 4:03 PM	
21.1 KB	Yesterday at 12:40 PM	
26.8 KB	Yesterday at 12:33 PM	
23.5 KB	Yesterday at 8:03 AM	
47.6 KB	Wednesday at 1:48 PM	
163 KB	Wednesday at 9:00 AM	
62.6 KB	Tuesday at 3:01 PM	
71.6 KB	Tuesday at 2:08 PM	
54.6 KB	Tuesday at 2:08 PM	
105 KB	Tuesday at 3:27 PM	
126 KB	Tuesday at 11:12 AM	
51.3 KB	Tuesday at 10:30 AM	
47.6 KB	Tuesday at 10:25 AM	



Results from Document Library: xlsx

Version history

Name	Modified	Size	Comments
30.4	12/21/2023 7:42 PM	41.6 KB	
31.0	12/19/2023 7:25 PM	41.6 KB	
29.0	12/19/2023 6:27 PM	41.6 KB	
28.0	12/19/2023 6:06 PM	41.5 KB	
27.0	12/19/2023 2:10 PM	41.4 KB	
26.0	12/18/2023 5:27 PM	41 KB	
25.0	12/18/2023 9:59 AM	40.8 KB	
24.0	12/18/2023 9:36 AM	40.8 KB	
23.0	12/15/2023 6:47 PM	41.4 KB	
22.0	12/15/2023 6:45 PM	41.3 KB	
21.0	12/15/2023 5:29 PM	41.3 KB	
20.0	12/15/2023 5:08 PM	40.9 KB	
19.0	12/15/2023 4:40 PM	40.8 KB	

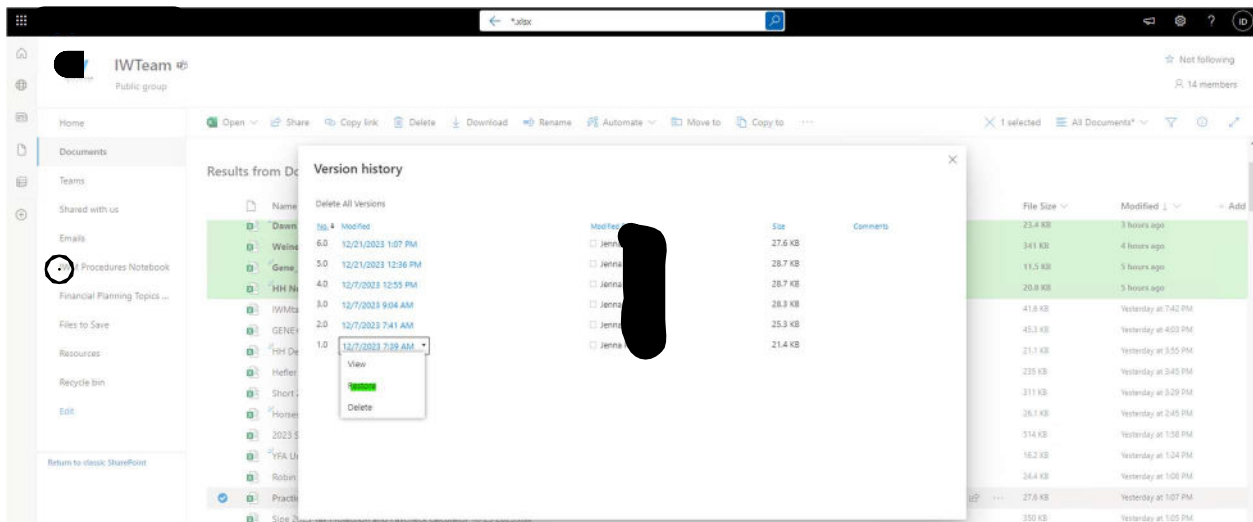
File Size Modified Add

23.4 KB	3 hours ago	
341 KB	4 hours ago	
11.3 KB	5 hours ago	
26.8 KB	5 hours ago	
41.6 KB	Yesterday at 7:42 PM	
45.3 KB	Yesterday at 4:03 PM	
21.1 KB	Yesterday at 3:25 PM	
235 KB	Yesterday at 3:43 PM	
311 KB	Yesterday at 3:29 PM	
26.1 KB	Yesterday at 3:45 PM	
374 KB	Yesterday at 1:58 PM	
16.2 KB	Yesterday at 1:24 PM	
24.4 KB	Yesterday at 1:08 PM	
27.6 KB	Yesterday at 1:07 PM	
350 KB	Yesterday at 1:01 PM	

Proof of Restored Backup Testing

View version history in SharePoint Online:

- 1- Open the list or library from the Quick Launch bar. If the name of your list or library does not appear, click **Site Contents** or **View All Site Content**, and then click the name of your list or library.
- 2- Right-click on the space between the item or document name and date and then click **Version History** from the menu or ellipsis (...). You might need to scroll the menu to see **Version History**.
- 3- In the **Version History** dialog, hover next to the version you want to view and click the down arrow on the right side to get view details or restore.



The screenshot shows the SharePoint Online interface for a site named "IWTeam". The left sidebar shows the "Documents" section with a list of files. The "Procedures Notebook" file is selected, and its version history is displayed in a modal dialog. The dialog shows a table of versions with columns for Name, Modified, Size, and Comments. The version history for "Procedures Notebook" is as follows:

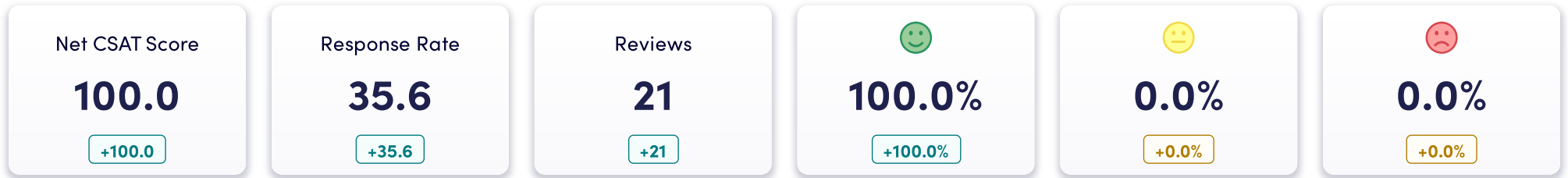
Name	Modified	Size	Comments
Down	12/21/2023 1:07 PM	27.6 KB	
Weine	12/21/2023 12:36 PM	28.7 KB	
Gene	12/7/2023 12:55 PM	28.7 KB	
HH Ne	12/7/2023 9:04 AM	28.3 KB	
IWMa	12/7/2023 7:41 AM	25.3 KB	
GENE	12/7/2023 7:39 AM	21.4 KB	
HH De			
Hefler			
Short			
Horne			
2023 S			
VTA U			
Robyn			
Practi			
Sipe			

The "Version History" dialog is open, showing a list of versions. The version "12/7/2023 7:39 AM" is selected, and a context menu is visible with options "View" and "Delete".

Professional Services (Past 6 Months)

ABC Wealth	Service Type:	Request	# of Tickets:	11
Managed Services			# of Tickets:	11
ABC Wealth	Service Type:	Incident	# of Tickets:	11
Managed Services			# of Tickets:	11
ABC Wealth	Service Type:	Audit	# of Tickets:	1
Managed Services			# of Tickets:	1
ABC Wealth	Service Type:	Problem	# of Tickets:	2
Managed Services			# of Tickets:	2
ABC Wealth	Service Type:		# of Tickets:	3
Managed Services			# of Tickets:	3
			Total Tickets:	28

CSAT KEY METRICS



CSAT REVIEWS WITH COMMENTS



26 Jan 2024 Ticket [672388](#) - Scans are failing - and not coming into our MyScans folder.

Heidi Responsive and always helpful!



10 Jan 2024 Ticket [670214](#) - Adobe PDF

Heidi Always timely and pleasant and gets things fixed right away.



28 Nov 2023 Ticket [663207](#) - Website Hosting Logins- For Sam H

Tania : Sam is always helpful and a pleasure to work with. We feel like we have a true partner.



20 Nov 2023 Ticket [664986](#) - Outlook Issues - Blue Orb Spinning - Cannot use my email. Also possible Adobe issues??

Heidi Zack was very helpful and super fast. He knew exactly what was happening and rectified it quickly. He went through everything with me to make 100% certain all was functioning properly.



26 Oct 2023 Ticket [662300](#) - Password reset

Ernest : Great service...thanks



02 Oct 2023 Ticket [659251](#) - NetDocuments Error/Issue

Heidi Zack Z was helpful and very quick.



19 Jul 2023 Ticket [649991](#) - CRM not opening

Jeffrey : Quick efficient and timely manner in which request was entered and i received a phone call which led to a resolution. Thank you.



22 Jun 2023 Ticket [645118](#) - NEW TICKET REQUEST FOR GUEST WIFI ISSUES

Heidi Persistently pursued and repaired the problem! Thank you!



17 May 2023 Ticket [641334](#) - Possible Compromise- Received a spyware pop-up-EMERGENCY

Heidi : As always Sam is calm and efficient and gets everything checked straight away. Always a pleasure to work with Sam.



26 Apr 2023 Ticket [639175](#) - Update Role in Microsoft Suite/Online

Heidi We ask/request and InhouseCIO makes it happen!



18 Apr 2023 Ticket [638220](#) - RE: InhouseCIO Client Portal Password Setup

Heidi Always timely and always solves the problem!



07 Mar 2023 Ticket [633271](#) - Link Heidi's Computer to Sharepoint scan folder and printer

Heidi Sam is patient and very helpful. He works to make sure I understand all aspects of what we are trying to accomplish.



08 Feb 2023 Ticket [630301](#) - Ticket

Tania : Mark has been FANTASTIC!
