



**Technology Business  
Review**

**Prepared for**

**ABC Wealth**

**March 1, 2024**



## Technology Business Review for ABC Wealth

Prepared by: David Kakish

Date: March 1, 2024

Category	!	Comments
<b>Cloud Platform</b>		
Summary	☑	Overall Good Health.
Platform	☑	On RIA Workspace with Advance Security Platform powered by Microsoft
Secure Single Sign On	!	You currently using SSO to access your cloud applications in a secure and compliant way
Data - Retention	!	You are currently using Retention Policy with 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 on the same document?
<b>Email Infrastructure</b>		
Mail Server/Email	☑	Hosted Microsoft Exchange in good working order.
Email - Multi-factor Authentication	☑	Multi-factor Authentication is turned on
Email - Antivirus and Antispam Standard	☑	Email system has antivirus and antispam in place
Email - Advanced Threats	!	Microsoft Defender For Office 365 in place.
Email - Encryption	!	Encrypting emails that contain sensitive information in the environment
Email - Retention	!	You are currently using Retention Policy with Keep Content Forever with Preservation Lock on
Email Auditing	!	it is active and functional with Microsoft
Email - Data Loss Prevention (DLP)	!	Data Loss Prevention is in place for U.S. Financial Data & U.S. Personally Identifiable Information (PII) Data
Instant Messaging - Retention	!	You are currently using Retention Policy with Keep Content Forever with Preservation Lock on
<b>Wide Area Network</b>		
Internet Access	☑	No Information Available
ISP Failover	!	No Failover line is configured
Firewall	☑	In place using Microsoft Defender for Endpoint
Network Security	☑	Firewall Security Services are in place using Microsoft Defender for Endpoint
Modern Remote Access	☑	Uses the Microsoft Active Directory Services so Team is able to work and be fully productive when outside the office



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	!	Comments
<b>Local Area Network</b>		
Patch Status	✓	Over 90% Patched
Desktops	✓	All computers are running the latest version of windows
Computer encryption	✓	All computers are encrypted especially now that employees are working from home
Virus Protection	✓	Fully Synced & Updated by Windows 10 Defender
Endpoint Protection	!	Microsoft Defender For Endpoint in place
Switches	✓	Good Health
Wireless Access Points	✓	No Information on File.
Internet Filtering/Reporting	!	Internet filtering is in place using Microsoft Defender for Endpoint
Security Best Practices	!	For password policy, internet policy and more <a href="#">Click Here for Templates</a>
<b>Back Up &amp; Disaster Recovery</b>		
Written Plan	✓	<a href="#">Appendix A - Click Here</a>
Communication	✓	<a href="#">Appendix B - Click Here</a>
Automate Backups	✓	All backups are automated to minimize human error. RIA WorkSpace 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
<b>Business Issues</b>		
Network Documentation	✓	Documented by InhouseCIO. Can provide a copy to key contacts
Expansion/Growth	!	How to easily add other smaller or independent advisors to your team
External Penetration Test	!	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 <a href="#">Click here for more information</a>



### Technology Business Review for ABC Wealth

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Comments		
Client Relationship		
"ABC Wealth" 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

<b>Computer Name</b>	<b>User</b>	<b>OS</b>
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

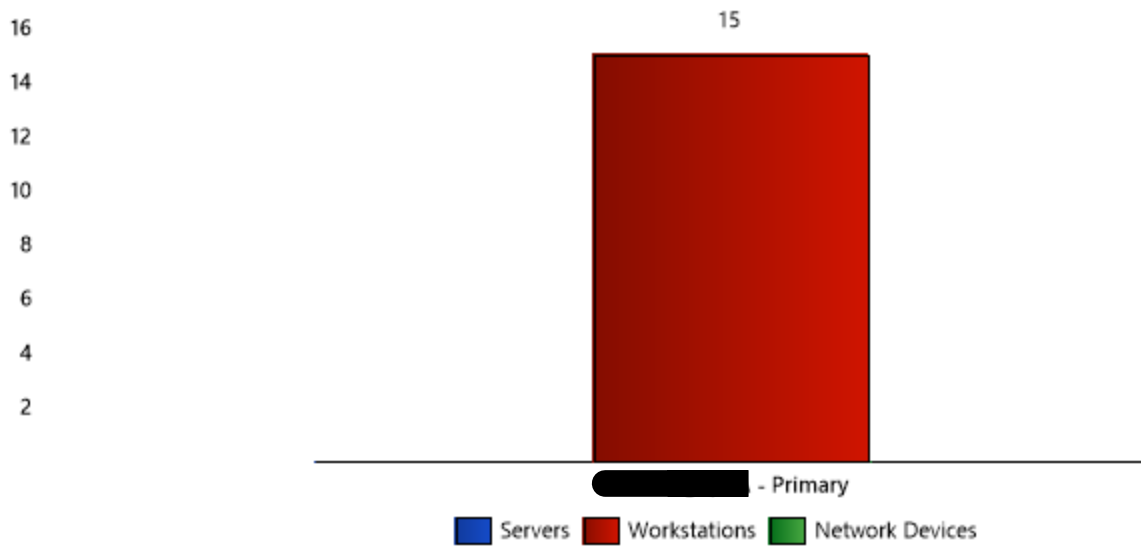
## ABC Wealth

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

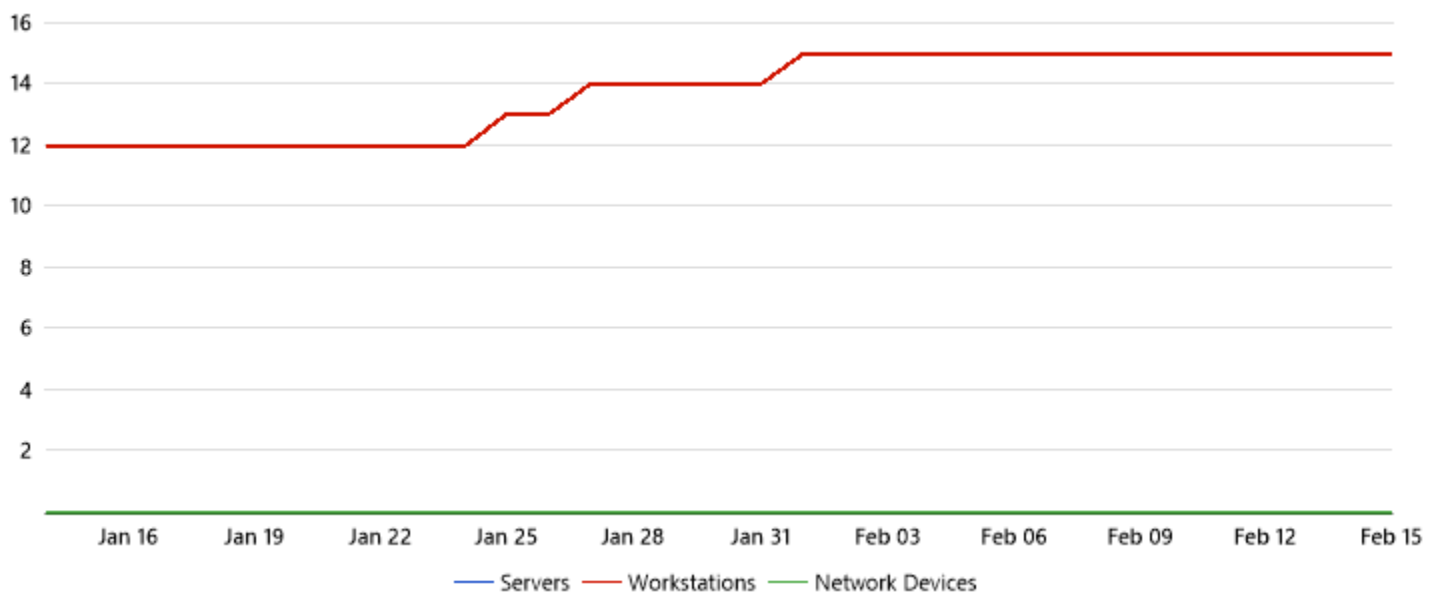
## Asset Analysis

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

## Devices By Location



## Asset Deployment History



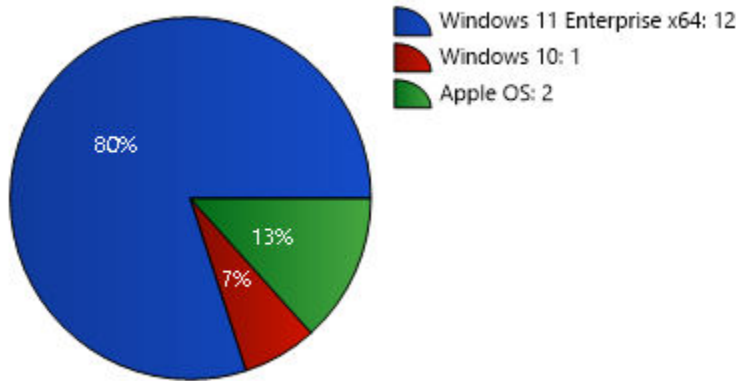


# Asset Summary Report

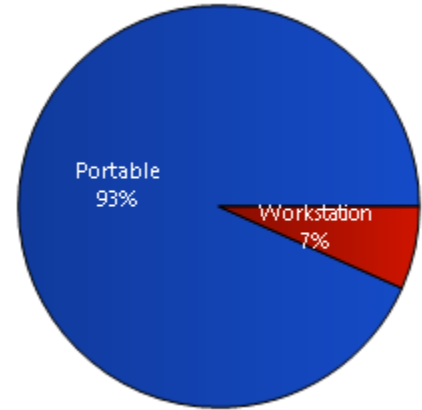
February 15, 2024

## Workstation Assets

### Workstations by Operating Systems



### Workstation Form Factor



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

# Asset Summary Report



February 15, 2024



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

# Asset Summary Report




February 15, 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

## Patch Compliance

 **100.00%**

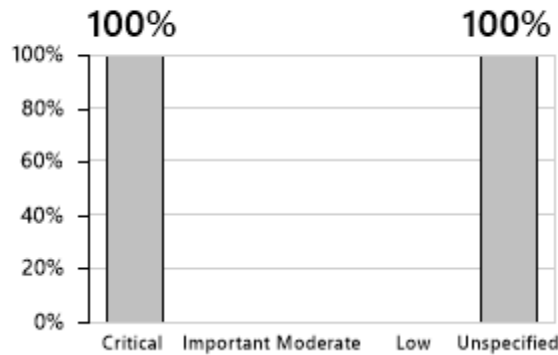
Patch Compliance Calculation

25 Installed / 25 Approved

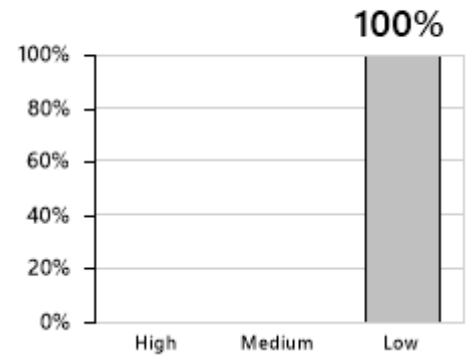
Total Managed Windows Assets

0 Servers / 13 Workstations

## Compliance by Severity



## Compliance by CVSS



## Non-Compliant Devices

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

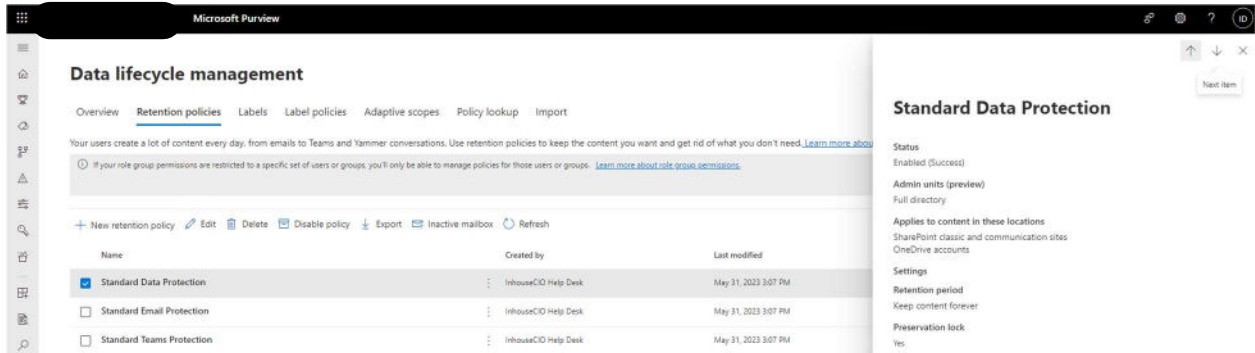
- If the data is deleted or modified:
  - A copy of the data will be placed on the Preservation Hold Library
  - A timer job that runs periodically will identify which files/folder retention period has expired.
  - Files/Folders are permanently deleted within seven days at the end of the retention period.
- 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



**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

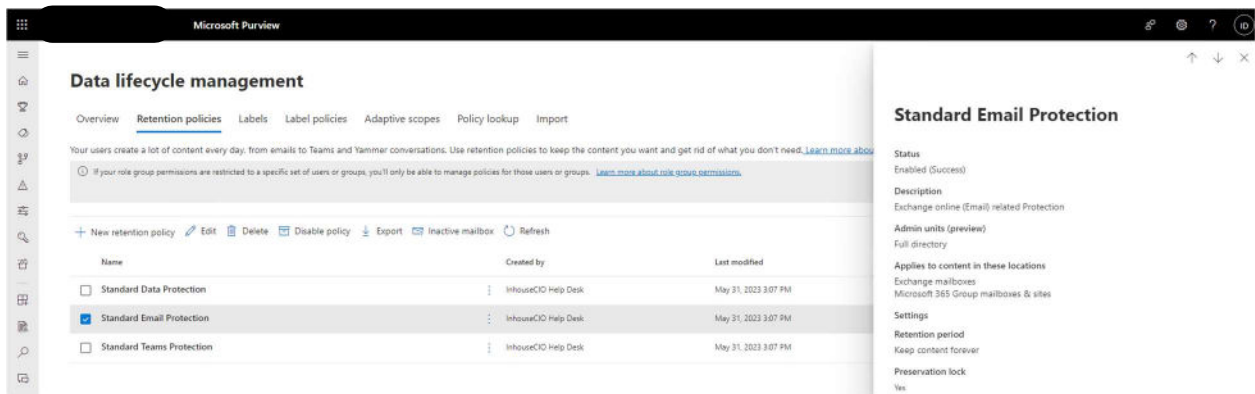
**Standard Data Protection**

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



**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**

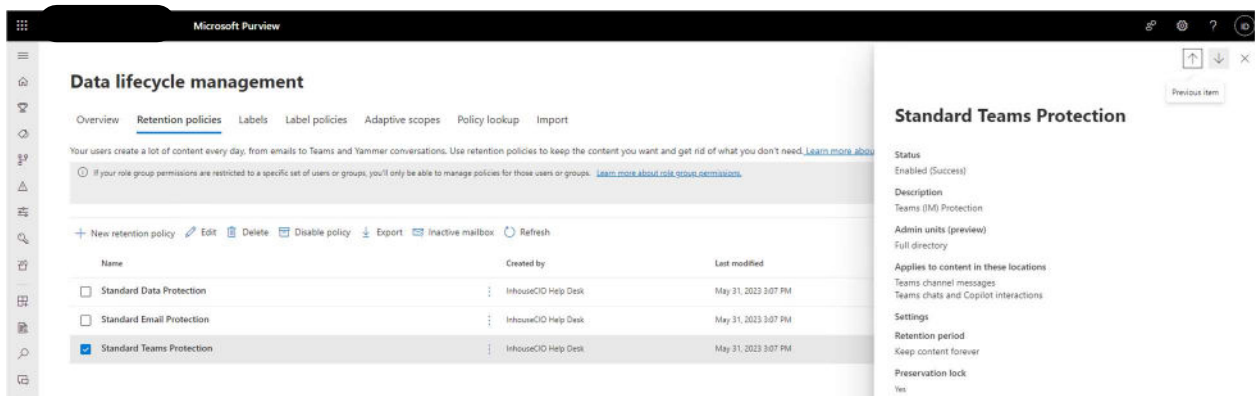
Status: Enabled (Success)

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



**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)

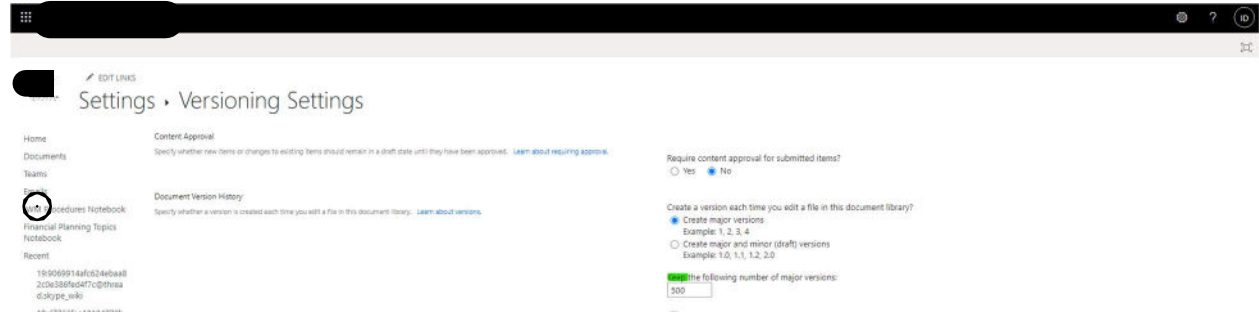
Description: Teams (IM) Protection

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**

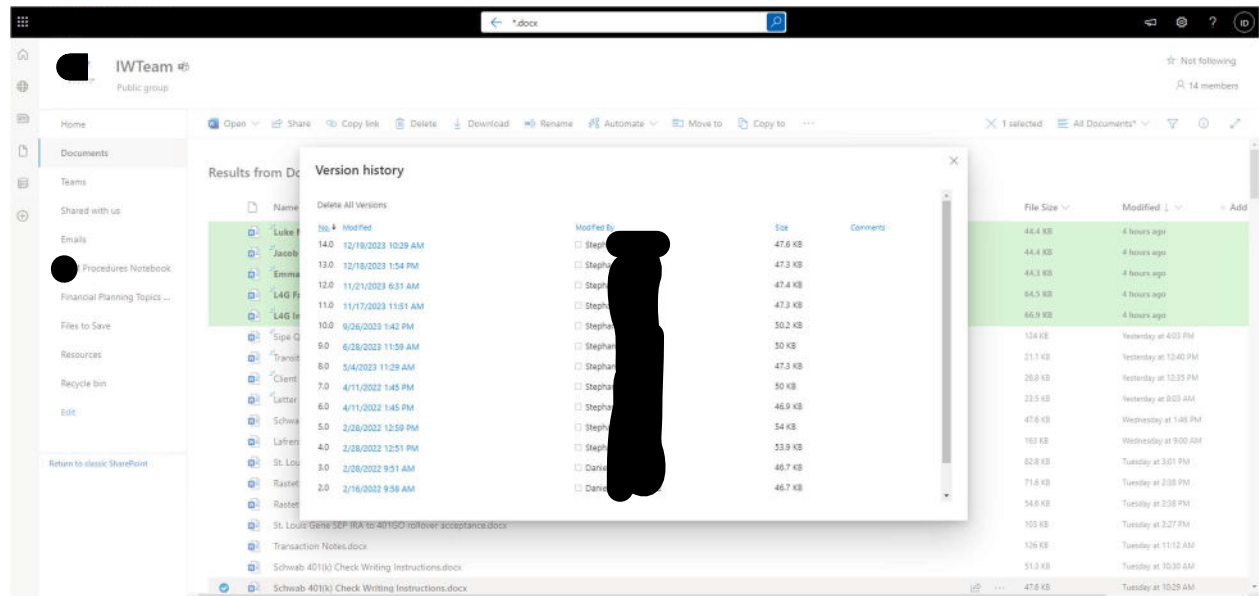
**Content Approval**  
Specify whether new items or changes to existing items should remain in a draft state until they have been approved. [Learn about requiring approval.](#)

Require content approval for submitted items?  
 Yes  No

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

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:



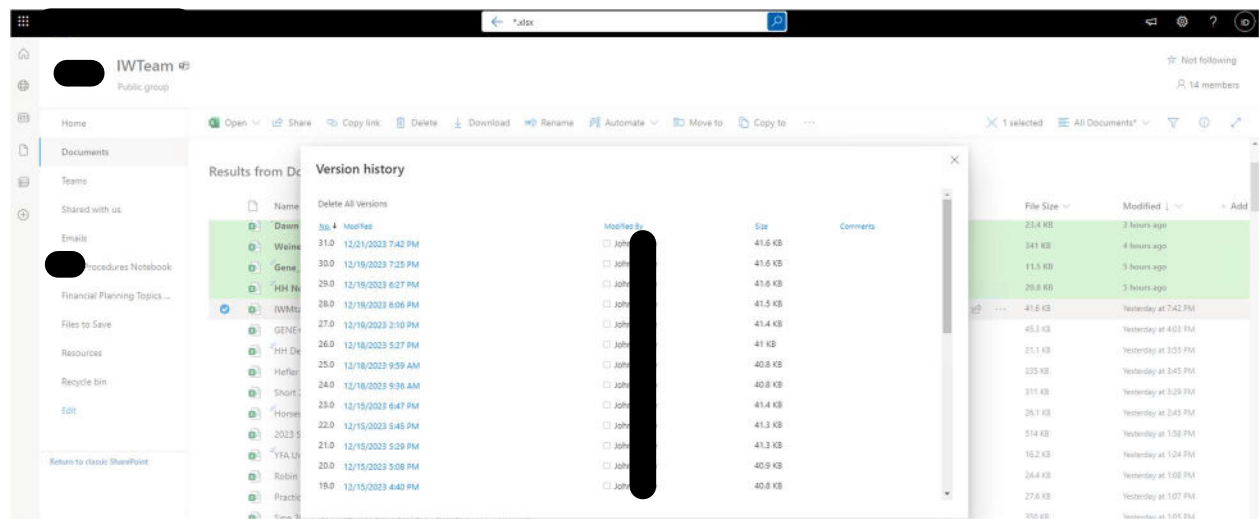
**Results from Document Library: door**

**Version history**

Name	Delete All Versions	Modified	Size	Comments
Luke F	36.4	Modified		
Jacob	14.0	12/18/2023 10:29 AM	47.6 KB	
Emma	13.0	12/18/2023 1:54 PM	47.3 KB	
LAG F	12.0	11/21/2023 8:31 AM	47.4 KB	
LAG F	11.0	11/17/2023 11:51 AM	47.3 KB	
Sipe Q	10.0	9/26/2023 1:42 PM	50.2 KB	
Transit	9.0	6/28/2023 11:59 AM	50 KB	
Client	8.0	5/4/2023 11:29 AM	47.3 KB	
Letter	7.0	4/11/2022 1:45 PM	50 KB	
Schwa	6.0	4/11/2022 1:45 PM	46.9 KB	
Lafren	5.0	2/28/2022 12:59 PM	54 KB	
St. Lou	4.0	2/28/2022 12:51 PM	53.9 KB	
Raster	3.0	2/28/2022 9:51 AM	46.7 KB	
Raster	2.0	2/16/2022 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
- 64.3 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
- 28.0 KB Yesterday at 12:25 PM
- 23.0 KB Yesterday at 8:03 AM
- 47.6 KB Wednesday at 1:48 PM
- 103 KB Wednesday at 9:00 AM
- 62.8 KB Tuesday at 3:01 PM
- 71.6 KB Tuesday at 2:08 PM
- 54.0 KB Tuesday at 2:08 PM
- 100 KB Tuesday at 3:27 PM
- 126 KB Tuesday at 11:52 AM
- 51.0 KB Tuesday at 10:30 AM
- 47.6 KB Tuesday at 10:25 AM



**Results from Document Library: xlsx**

**Version history**

Name	Delete All Versions	Modified	Size	Comments
Dawn	36.4	Modified		
Weine	31.0	12/21/2023 7:42 PM	41.6 KB	
Gene	30.0	12/19/2023 7:25 PM	41.6 KB	
HH R	29.0	12/19/2023 6:27 PM	41.6 KB	
IWMU	28.0	12/19/2023 6:06 PM	41.5 KB	
GENE	27.0	12/19/2023 2:10 PM	41.4 KB	
HH De	26.0	12/18/2023 5:27 PM	41 KB	
HH De	25.0	12/18/2023 9:59 AM	40.8 KB	
Haffer	24.0	12/18/2023 9:36 AM	40.8 KB	
Short	23.0	12/15/2023 6:47 PM	41.4 KB	
Horse	22.0	12/15/2023 8:45 PM	41.3 KB	
2023 S	21.0	12/15/2023 5:29 PM	41.3 KB	
YFA Li	20.0	12/15/2023 5:08 PM	40.9 KB	
Rubin	19.0	12/15/2023 4:40 PM	40.8 KB	

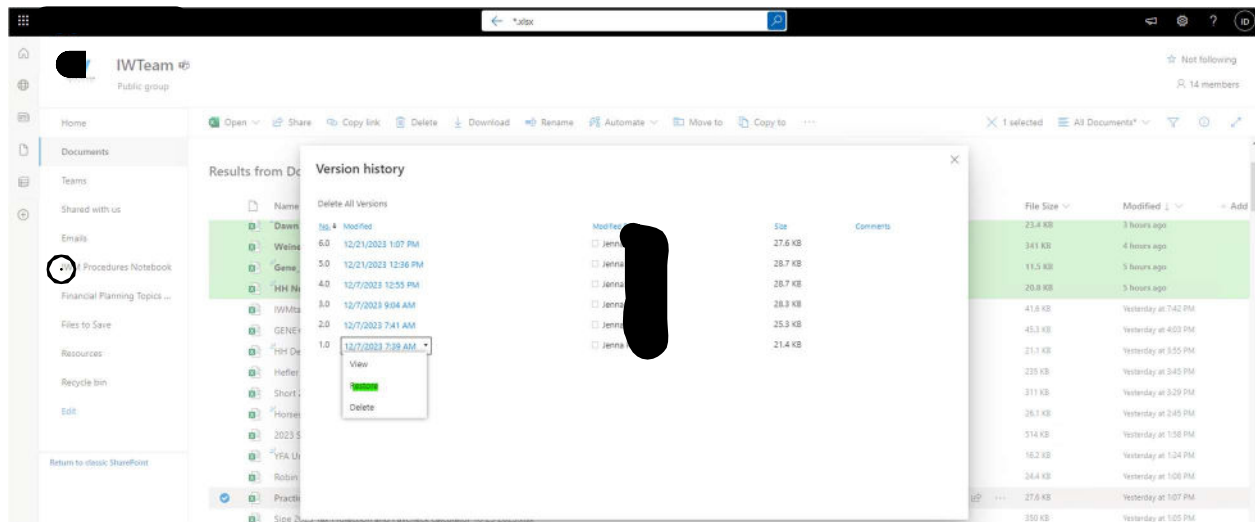
File Size Modified Add

- 23.4 KB 3 hours ago
- 34.1 KB 4 hours ago
- 11.5 KB 5 hours ago
- 20.8 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
- 22.0 KB Yesterday at 3:43 PM
- 31.1 KB Yesterday at 3:29 PM
- 28.1 KB Yesterday at 3:45 PM
- 314 KB Yesterday at 1:58 PM
- 16.2 KB Yesterday at 1:54 PM
- 24.4 KB Yesterday at 1:08 PM
- 27.6 KB Yesterday at 1:07 PM
- 39.0 KB Yesterday at 1:05 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.



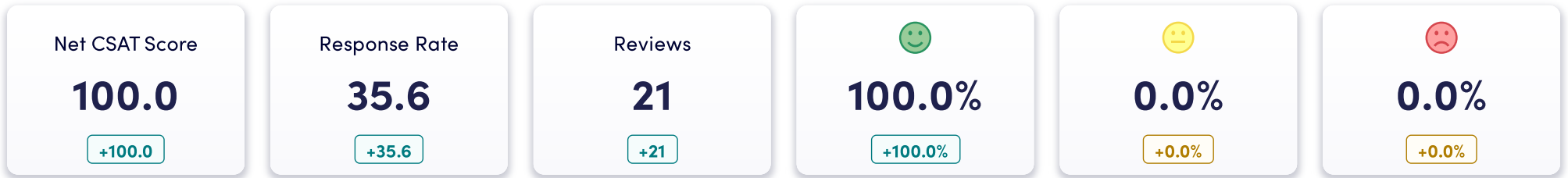
The screenshot shows the SharePoint Online interface for the 'IWTeam' public group. A 'Version history' dialog is open, displaying a table of document versions. The table has columns for Name, Deleted, Modified, Modified By, Size, and Comments. A dropdown menu is open over the 'Modified' column, showing 'View' and 'Delete' options. The background shows a list of documents with columns for File Size and Modified.

Name	Deleted	Modified	Modified By	Size	Comments
Dawn	10.0	12/21/2023 1:07 PM	Jenny	27.6 KB	
Wein	6.0	12/21/2023 12:36 PM	Jenny	28.7 KB	
Gene	5.0	12/7/2023 12:36 PM	Jenny	28.7 KB	
HH N	4.0	12/7/2023 12:55 PM	Jenny	28.9 KB	
IWM	3.0	12/7/2023 9:04 AM	Jenny	25.3 KB	
GENE	2.0	12/7/2023 7:41 AM	Jenny	21.4 KB	
HH De	1.0	12/7/2023 7:38 AM	Jenny		






### Professional Services (Past 6 Months)

ABC Wealth	<b>Service Type:</b>	Request	<b># of Tickets:</b>	11
Managed Services			<b># of Tickets:</b>	11
ABC Wealth	<b>Service Type:</b>	Incident	<b># of Tickets:</b>	11
Managed Services			<b># of Tickets:</b>	11
ABC Wealth	<b>Service Type:</b>	Audit	<b># of Tickets:</b>	1
Managed Services			<b># of Tickets:</b>	1
ABC Wealth	<b>Service Type:</b>	Problem	<b># of Tickets:</b>	2
Managed Services			<b># of Tickets:</b>	2
ABC Wealth	<b>Service Type:</b>		<b># of Tickets:</b>	3
Managed Services			<b># of Tickets:</b>	3
			<b>Total Tickets:</b>	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.

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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.

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

**Heidi** Persistently pursued and repaired the problem! Thank you!

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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.

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

**Heidi** We ask/request and InhouseCIO makes it happen!

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

**Heidi** Always timely and always solves the problem!

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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.

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

**Tania** : Mark has been FANTASTIC!

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