ITARIAN

Technology Assessment Platform

User Guide

Technology Assessment Platform – User Guide

The technology assessment platform (TAP) is an intelligence gathering tool that helps MSPs audit their client's network infrastructure, and create a forward-looking plan to address their needs.

MSPs will work with their customers to complete a questionnaire of in-depth questions about their customer's environment. The questionnaire has hundreds of built-in questions covering all aspects of network setup, security, and composition. You can also create custom questions if required. Once complete, the platform generates a report which grades the customer on each aspect of their set-up, and provides an action-plan for you to address gaps in their coverage.

This tutorial explains how an MSP admin can create a questionnaire and generate reports:

- **Login / The TAP dashboard**
- **Customize the questionnaire (optional)**
- **Create a questionnaire**
- **Complete and submit the questionnaire**
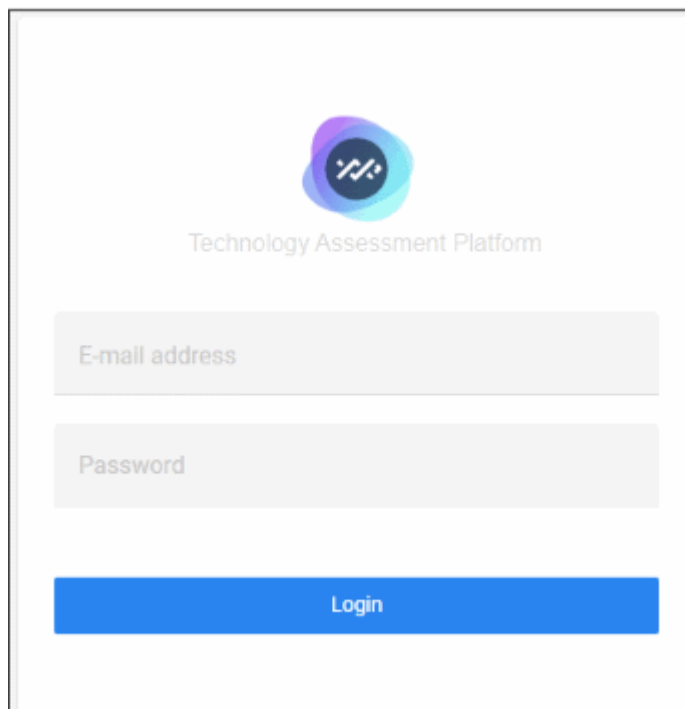- **View reports**

Login / The TAP dashboard

- Login to your MSP account at **https://www.itarian.com/app/login**

After logging in, click 'Applications' > 'Technology Assessment Platform'

This opens the TAP login page at **https://tap.itarian.com/**

- Login here with the same UN/PW you use for ITarian

The app opens at the dashboard:
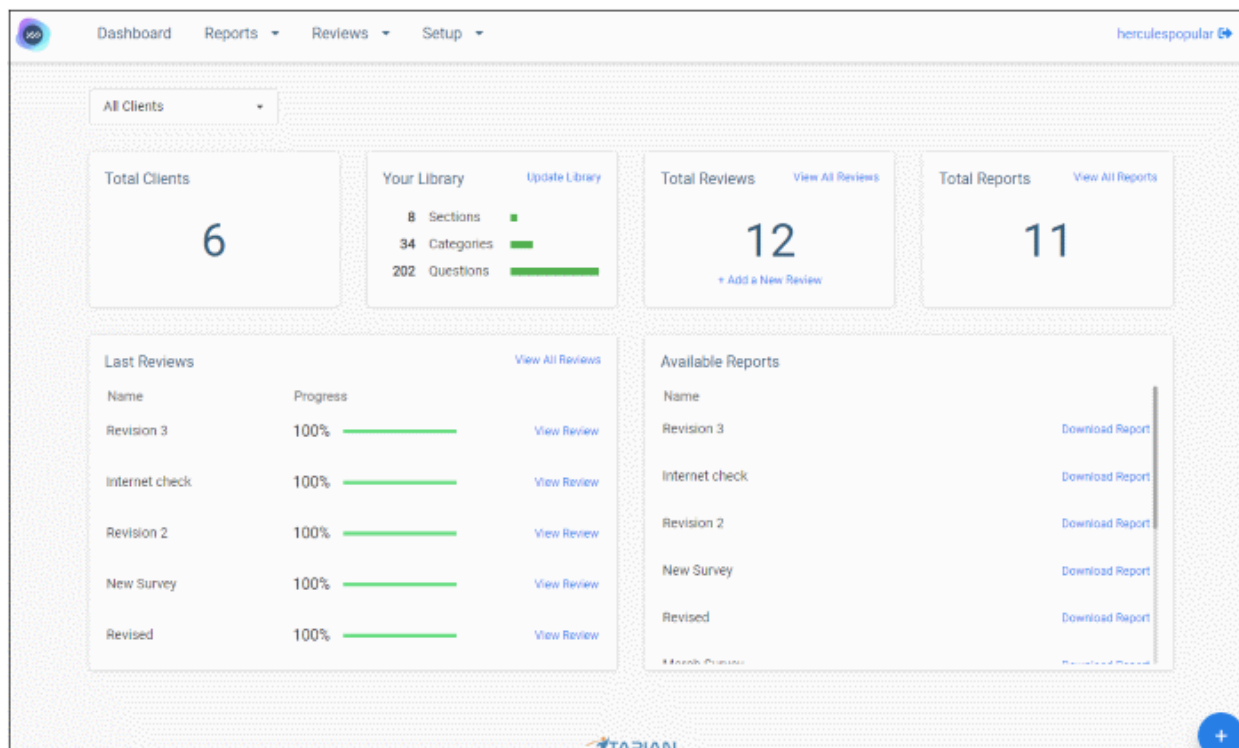
Top Menu

- **Dashboard** - Shows summary data for your clients, reviews (questionnaires), and reports

- **Reports** - You can generate a report after you have submitted a review (see next point). The report summarizes all the answers provided to your questions, gives your customer an overall grade, and contains advice on how to address issues.

  Client progress reports are a comparison between the two most recent reports for a specific customer. Ideally, the customer will have completed tasks between the two reports.

- **Reviews** - A 'review' is a questionnaire that you have created for a customer. Once all questions in the review have been answered, you can click 'Submit' to generate a report. You can also create a create new questionnaire from here.

- **Setup** - Customize your questionnaire. You can accept the default questionnaire, which includes all available questions, or create a custom questionnaire with only the questions you want.

Tiles

- **Total Clients** - The number of customers in your ITarian account

- **Your Library** – The library is your store of questionnaire sections, categories and individual questions. Choose a customer from the drop-down at upper-left to view the library items for that customer.

- **Total Reviews** - The number of questionnaires you have created. This includes questionnaires that you have already submitted to create a report.

- **Total Reports** - The total number of reports you have generated. You can create a report after completing all questions in a review (questionnaire) then clicking 'Submit'.

- **Last Reviews** - The last five questionnaires you created. This list includes 'in-progress' questionnaires, and questionnaires that you have submitted to generate a report.

- **Available Reports** - A list of all reports you have created Click 'Download Report' to view the report in .pdf format.

The default view shows details for all your customers.

- Click 'All Clients' at top-left then select a customer to view their details

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- Click '+' at bottom-right to start creating a new questionnaire

Customize the questionnaire (optional)

Click 'Setup' > 'Library'

- TAP has a set of built-in standard questions that you can use in your survey. You can use the default questions or create your own, tailored to your customer.

- The default is for the survey to use all questions in all categories.

- You can create a custom questionnaire by removing or editing sections, categories and questions. You can also create new sections/categories/questions from scratch.

Click 'Setup' > 'Library' to open the library screen:
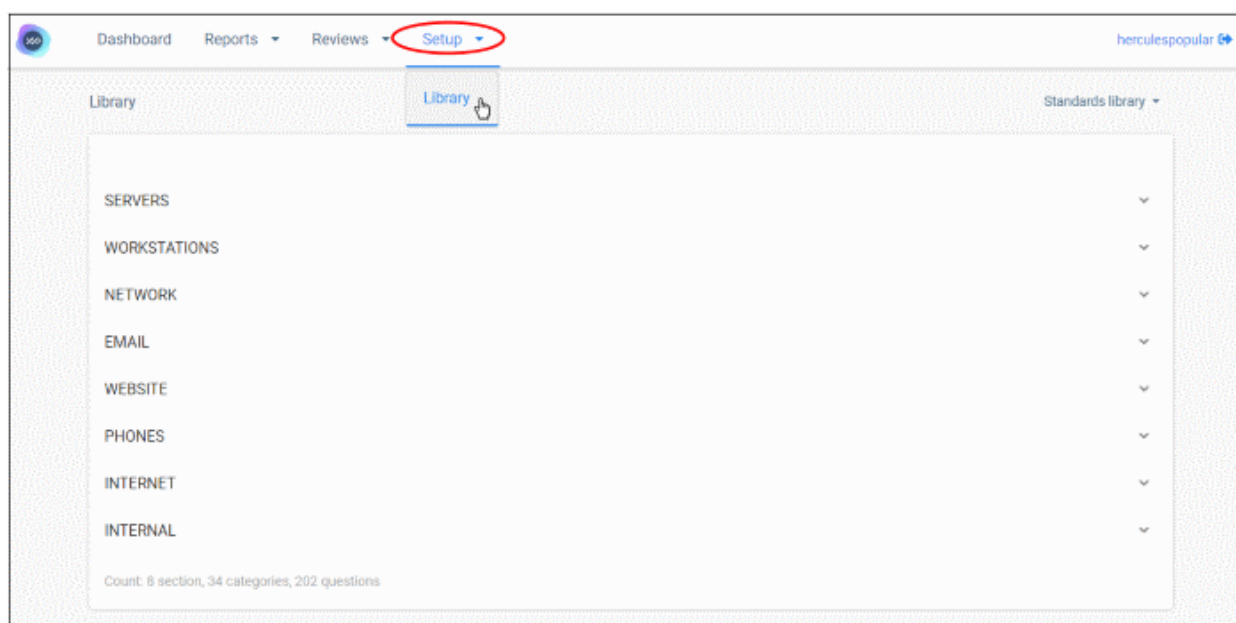
The survey is divided into three parts:

- **Section** – Broad, high-level topic under which you will place categories and individual questions. For example, 'Website' is a section under which you might have categories for 'Security', 'Backup', 'Management' etc.

- **Category** – An area of concern, or topic, under the main section mentioned above. You can have multiple categories in each section, and each category can house multiple questions.

   For example, if the section is 'Websites', and the category is 'Security', then one of your questions might be 'Have you installed a trusted SSL certificate on all publicly-facing websites?'

- **Question** – An individual question belonging to the category mentioned above. You can add multiple questions to each category.

Customize your survey

- Click 'Setup' > 'Library'
- Click the drop-down at the top-right
- Select the target customer:
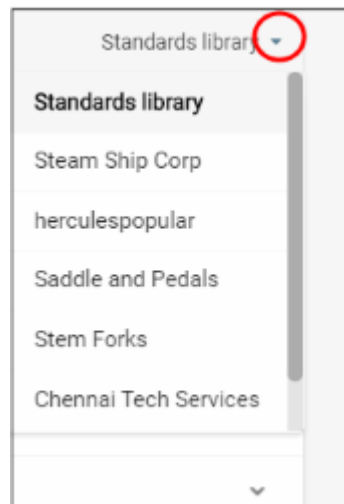
A plus sign appears at the top-right, indicating you can edit the built-in questionnaire for the customer.

- **Create a new section**
- **Create a new category**
- **Create a new question**
- **Edit a section name**
- **Edit a category name**
- **Update a question**

Create a new section

If the default topics do not address the questions you want to ask, then you can create an entirely new section:

- Click 'Setup' > 'Library' > select your customer from the drop-down at top-right
- Click the '+' button:
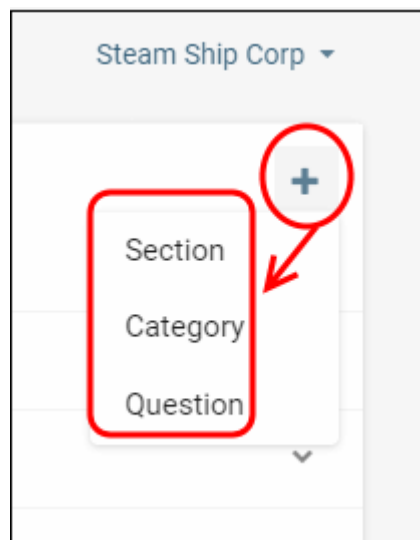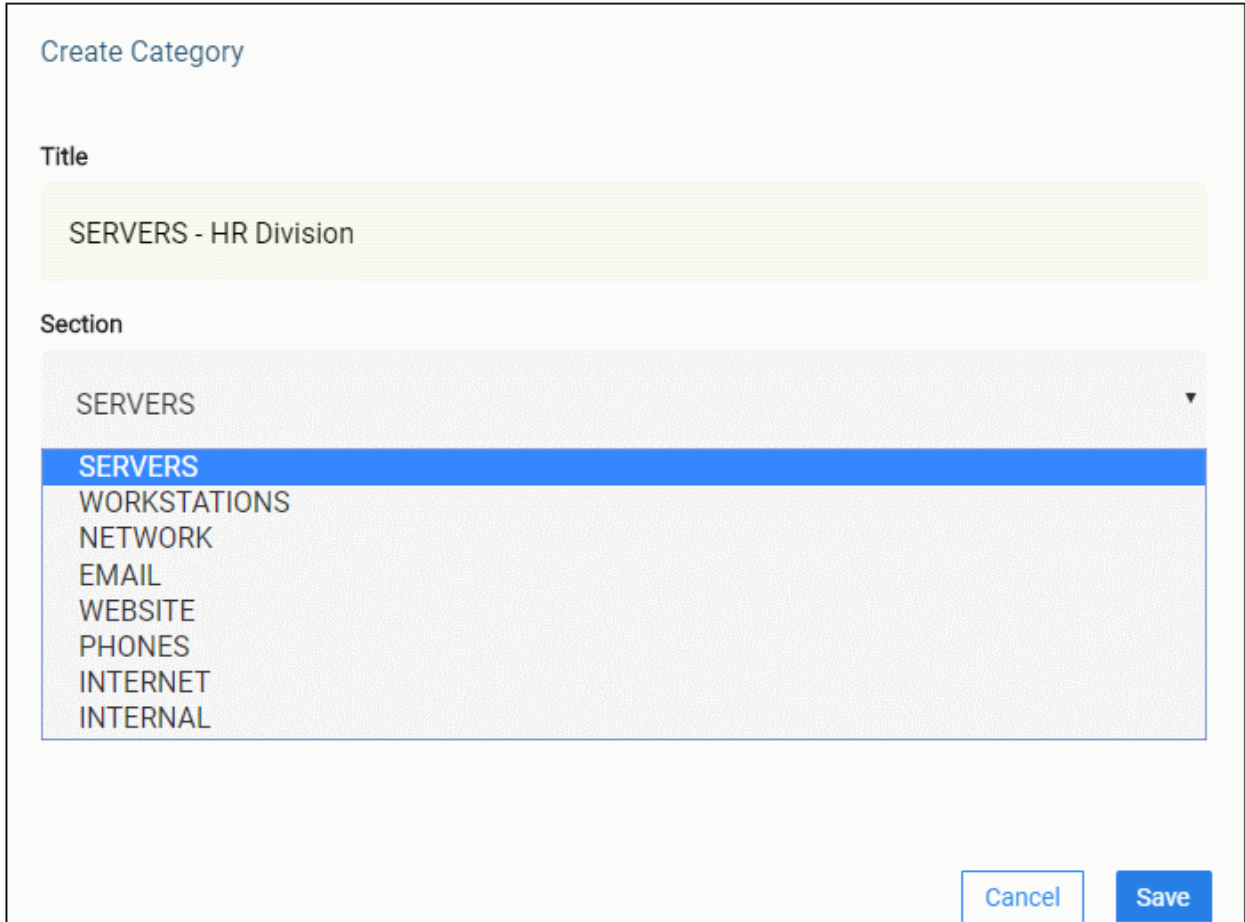
- Click 'Section'
- Enter a new name in the 'Create Section' dialog and click Save'

Your new section appears on the library home-screen. You can now add categories and questions to the section.

Create a new category

A category is an area of interest underneath a broad topic/section. For example, the section 'Workstations' may have sub-sections (categories) for 'Data Backups', 'Encryption', 'Patching' and 'Security'. Each category can contain multiple questions.

- Click 'Setup' > 'Library' > select your customer from the drop-down at top-right

- Click the '+' button

- Click 'Category'

- Type a name for your category.

- Select the section under which the category should be placed:

Create Category

Title

SERVERS - HR Division

Section

SERVERS ▾

| SERVERS |
| WORKSTATIONS |
| NETWORK |
| EMAIL |
| WEBSITE |
| PHONES |
| INTERNET |
| INTERNAL |

Cancel   **Save**

- Click 'Save' to apply your changes

Create a new question

- Click 'Setup' > 'Library' > select your customer from the drop-down at top-right

- Click the '+' button

- Click 'Question':

Name - The question prefix. The name appears just before the question itself to set the topic of the question. Example question 'names' are shown in bold below:

- **Storage** - Is the current storage capacity sufficient for future growth?
- **Database size** - Are the Exchange databases below the limit set by Microsoft?
- **Hot spare** - Does the client have a Hot Spare workstation?
- **Backup encryption** – Do workstation backups use 256 bit AES encryption?

Priority - Select the importance of the question.

Section - Choose the section under which the question belongs

**Category -** Choose the category under which the question belongs

Question - Type the question that you want to ask your customer.

Why we are asking? - Explain why it is important that the customer addresses this area of concern.

- Click 'Save' to apply your changes

Edit a section name

- Place the mouse in section row and click the edit button

- Update the section name as required and click 'Save' below:

- For example, you can update the name as 'Servers – HR department'
- Click the trash can to remove a section

Edit a category name

- Click the arrow at the end of a section to expand it
- Click the edit icon in the category row that you want to update

- Update the category name and click 'Save' below

- Click the trash can to remove a category

Update a question

- Click the arrow at the end of a category to expand it

- Click the edit icon in the question row that you want to update

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Edit Question

Title

Offsite Backups

Priority

High   ▾

Section

SERVERS   ▾

Category

Data Backups   ▾

Question

Are backups secured offsite?

Why we are asking?

Offsite backups help mitigate many things like disaster, theft, hardware failure, valuable

Cancel   **Save**

Name – The question prefix. The name appears just before the question itself to set the topic of the question. Example question 'names' are shown in bold below:

- **Storage** – Is the current storage capacity sufficient for future growth?

- **Database size** – Are the Exchange databases below the limit set by Microsoft?

- **Hot spare** – Does the client have a Hot Spare workstation?

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Priority – Select the importance of the question.

Section – Choose the section under which the question belongs

Category – Choose the category under which the question belongs

Question – Type the question that you want to ask your customer.

Why we are asking? - Explain why it is important that the customer addresses this area of concern.

- Click 'Save' to apply your changes

Create a questionnaire

- Click 'Reviews' > 'Add New Review'
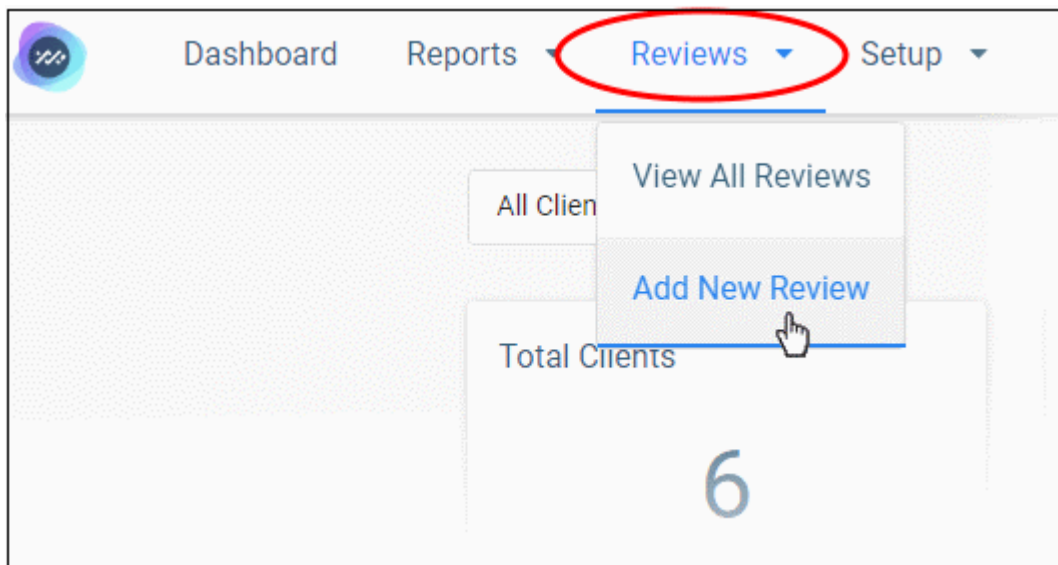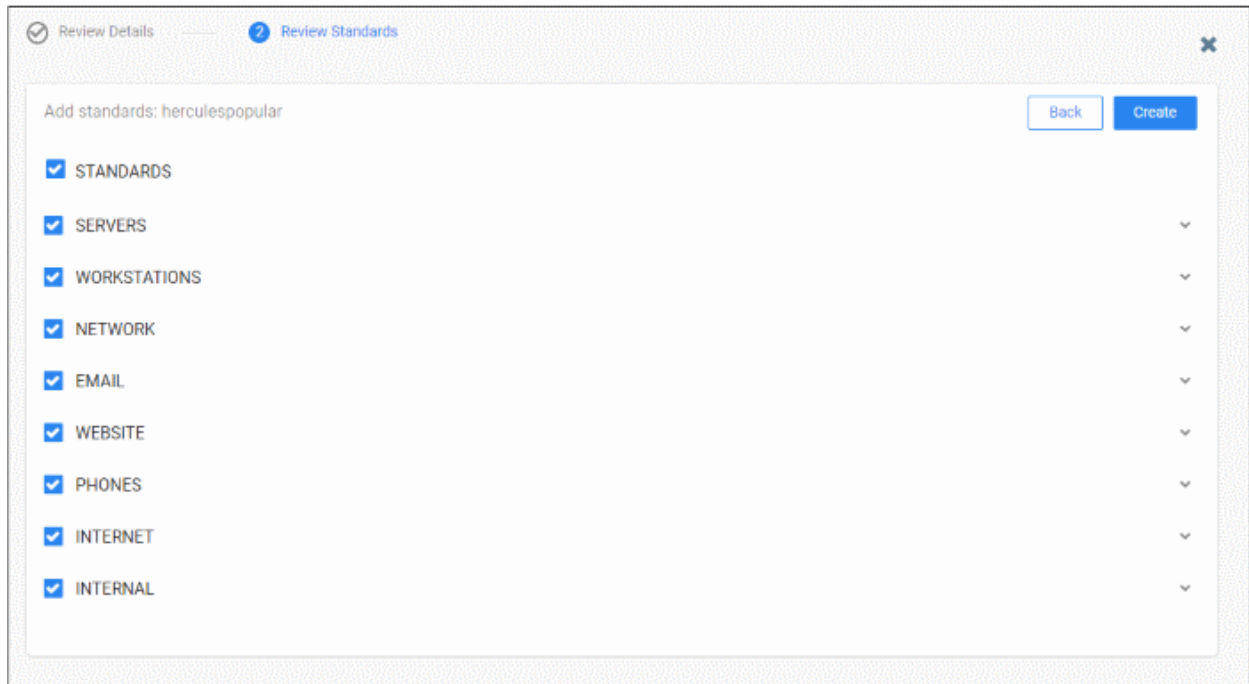
- Select your customer and create a name for your questionnaire:

- **Client** – Your customers are listed here. Click anywhere in the row and select the customer concerned.
- **Review title** – Create a name for your questionnaire.
- Click 'Next'

The standards screen is a list of topics that you can cover in the questionnaire.
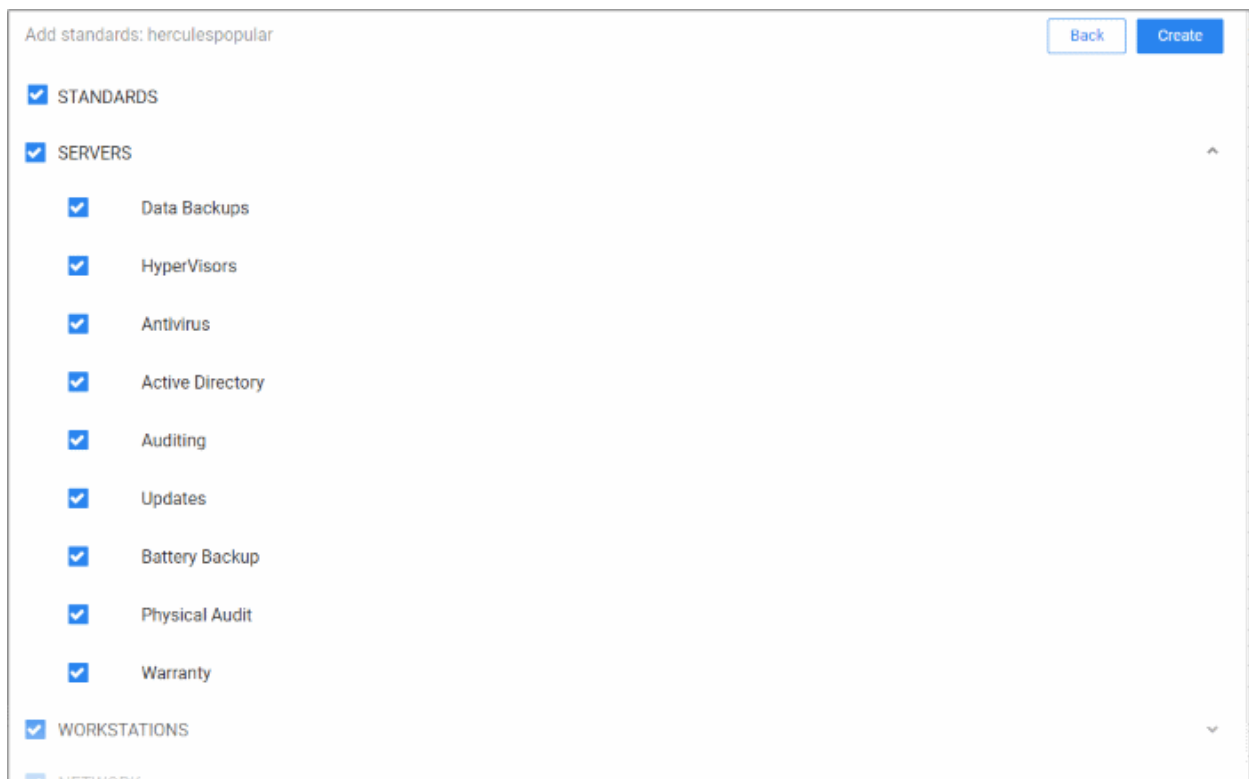
The survey lists the sections, categories and questions that you have **prepared for the customer**. If none are prepared then it shows the default questionnaire, which includes all questions.

- Expand any row to view its sub-categories. Select all items that apply to your customer:

- Disable 'Standards' to deselect all items.
- Click 'Create' when you are happy with your selection

Complete and submit the questionnaire

The review screen opens automatically after you finish choosing your topics. You can also open this screen from the top-menu:

- Click 'Reviews' > 'View All Reviews'
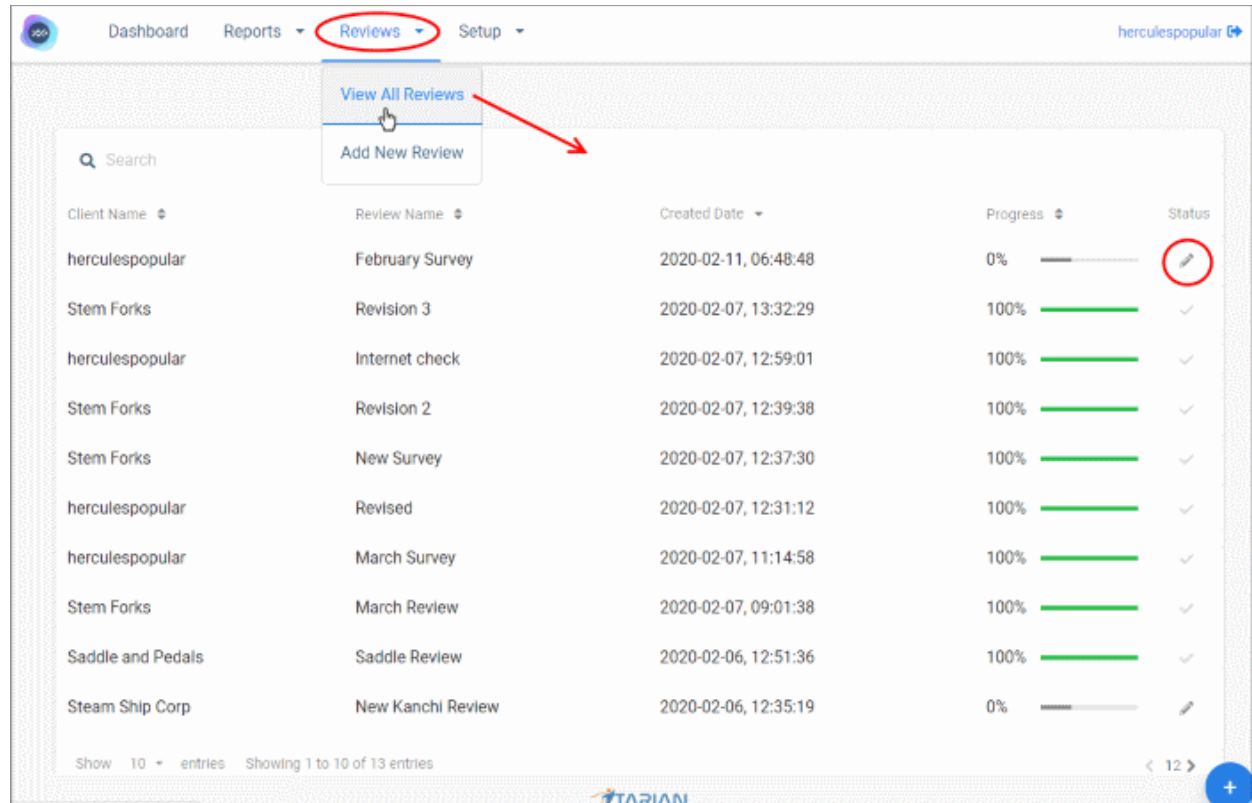
- You will next go through the questionnaire, answering the questions from knowledge provided by your customer or from your existing knowledge of their network.
- You can save at any time and resume later from where you left-off.
- When you have answered all questions, click 'Submit Review' to generate your report/action-plan.
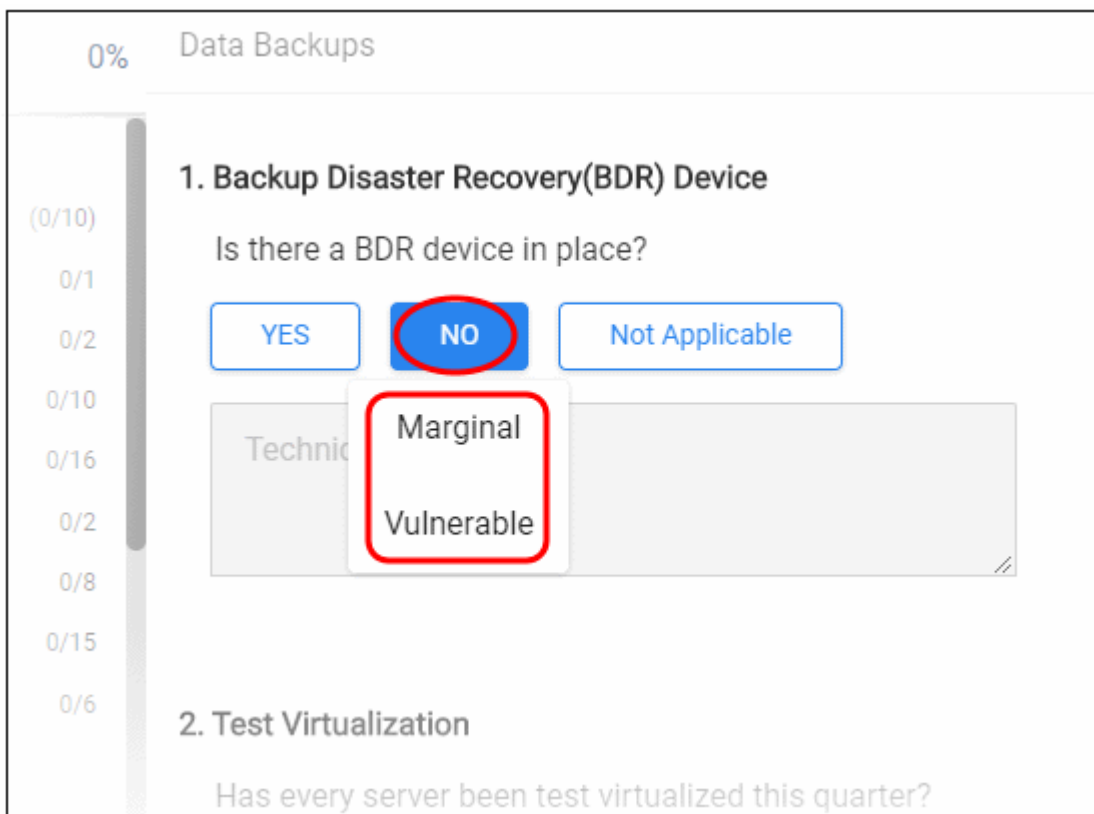
The pencil icon indicates the survey is not complete, or that it is complete but hasn't been submitted.

- Click the pencil icon to get started:
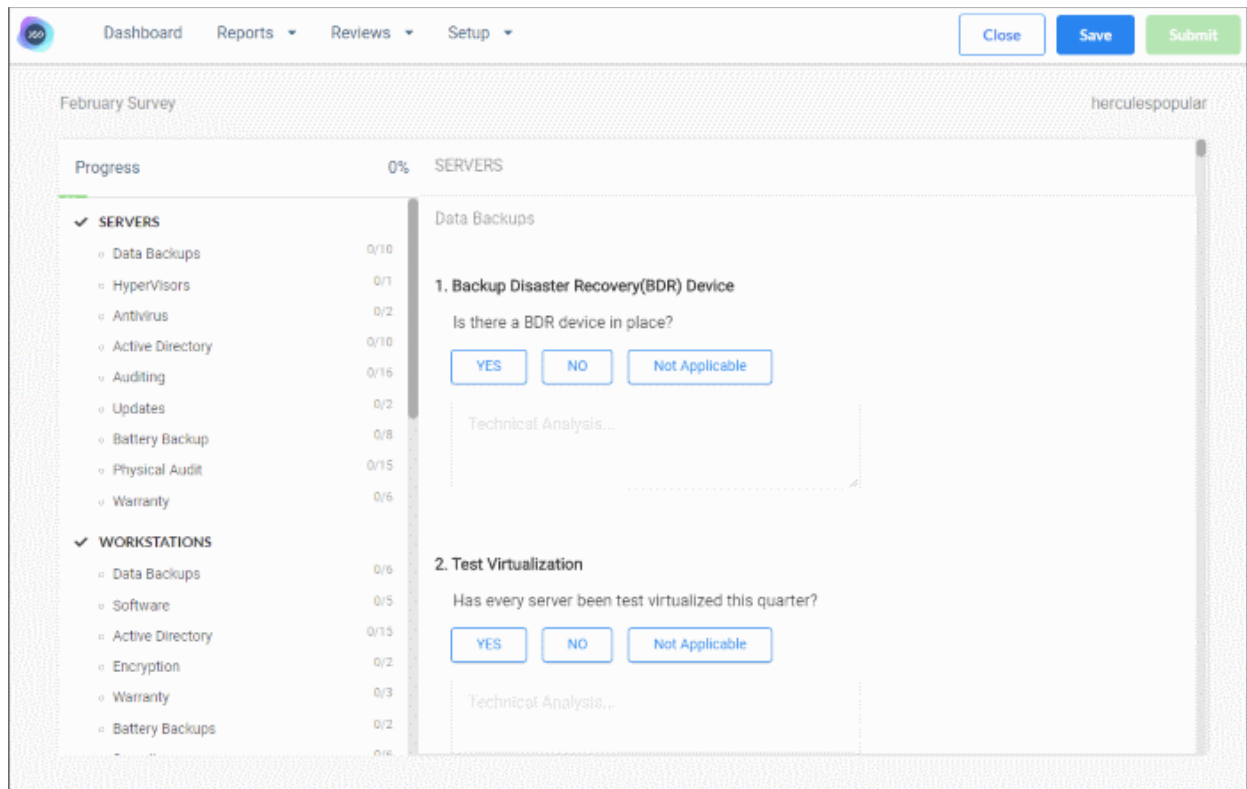
The column on the left shows the components you added to the survey.

- Select a component on the left to view its questions on the right

- Consult with your customer on each question and select the appropriate answer. There are four options:

    - **Yes** - The client has implemented measures that satisfy the requirements of the question. No action is necessary.
    - **No - Marginal Impact** - The client has not implemented the required measures, but the MSP feels there is little risk to the organization because of this.
    - **No - Major Impact** - The client has not implemented the required measures, and this represents a significant risk to the organization. MSPs are encouraged to prioritize these items.
    - **N / A** - The question is not relevant to the customers network.

Save - Saves the questionnaire with your answers so far. Click 'Review' > 'View all Reviews' to access and update the questionnaire in future.

Submit - If you have completed all questions to your satisfaction then click 'Submit'. This generates a report from the questionnaire. Click 'Reports' > 'Technology Assessment Report' to view it.

View reports

After completing your review (questionnaire) and clicking 'Submit', TAP prepares a report based on the answers provided. The report summarizes your answers, identifies action-areas, and provides risk mitigation advice.

You can download the report and pass to your customer for their review.

There are two kinds of report:

- **Technology Assessment Report** – Download the action-plan for a particular client.
- **Client Progress Report** – Compares the last two questionnaires.

Technology Assessment Report

- Click 'Reports' > 'Technology Assessment Reports'
- Select your client from the drop-down menu
- Click 'View Reports'
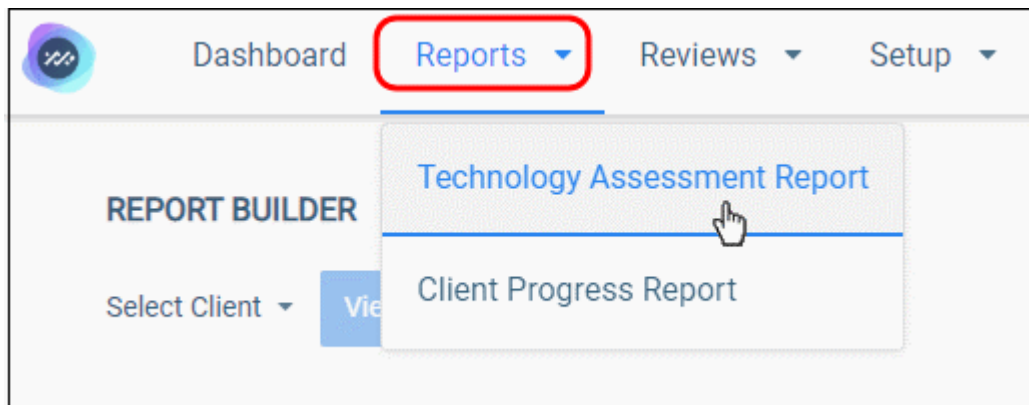
- Click the download icon next to the report you want to save:
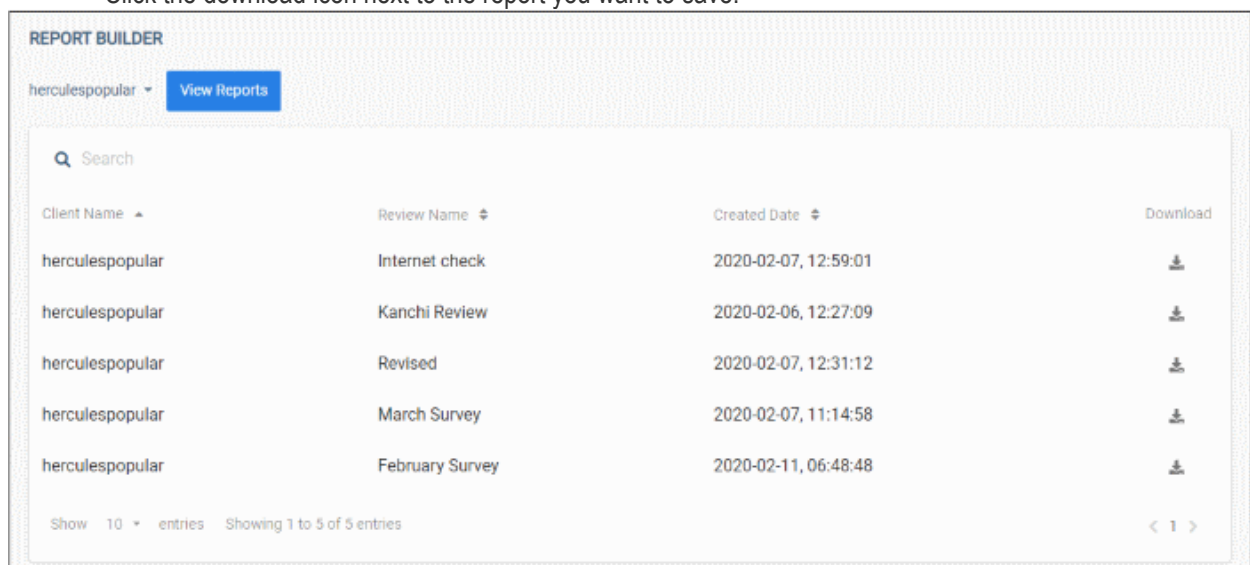
- The report opens in PDF format.
- The overall score for the client is shown on page 1. This is a weighted calculation from the scores for the individual sections. The lower the score, the higher the risk.

Technology Assessment Report

February Survey

Report Card Summary

Technology Summary Score

87%

👍 Positive Impacts [Answer - Yes]

🟠 Marginal Impacts [Answer - No/Marginal]

🔥 Major Risk Impacts [Answer - No/Vulnerable]

Total

173

24

1

SERVERS	WORKSTATIONS	NETWORK	EMAIL
👍 53	👍 34	👍 55	👍 18
🟠 15	🟠 5	🟠 2	🟠 0
🔥 1	🔥 0	🔥 0	🔥 0

WEBSITE	PHONES	INTERNET	INTERNAL
👍 0	👍 3	👍 1	👍 9
🟠 1	🟠 0	🟠 0	🟠 1
🔥 0	🔥 0	🔥 0	🔥 0

Prepared by herculespopular

2020-02-10   Page: 1

- Each section lists the individual questions in the survey, the responses, and the risk associated with the response. Scroll down the report to view each section:
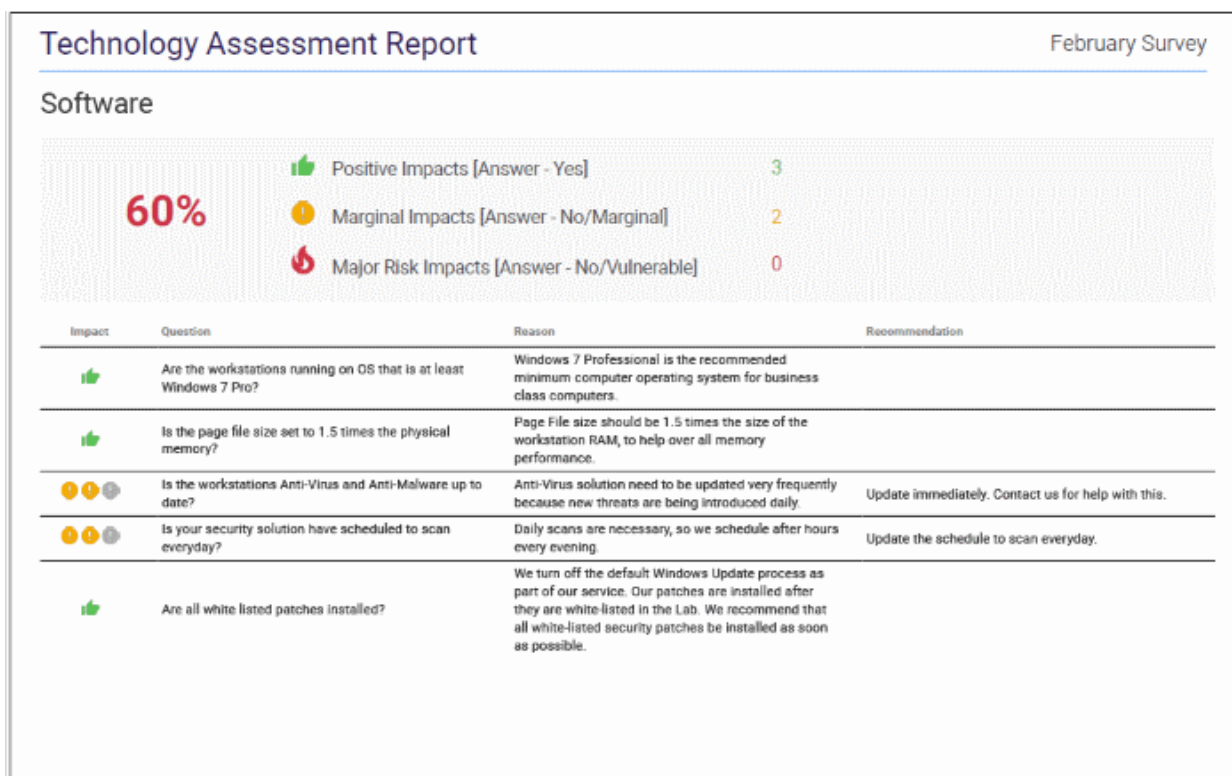
Impact – The type of answer provided. This can be:

- **Yes - Positive** – The client has implemented measures that satisfy the requirements of the question
- **No - Marginal Impact** – The client has not implemented the required measures, but the MSP feels there is little risk to the organization because of this.
- **No – Major Impact** – The client has not implemented the required measures, and this represents a significant risk to the organization. MSPs are encouraged to prioritize these items.

Question – The question that was asked of the customer about their network.

Reason – Explains why it is important that the customer addresses this area of concern.

Recommendation – The comments you provided in the questionnaire regarding this question. For example, you could write your initial thoughts on how to remediate a major issue, or explain why you assigned a 'Marginal Impact' verdict on an item.
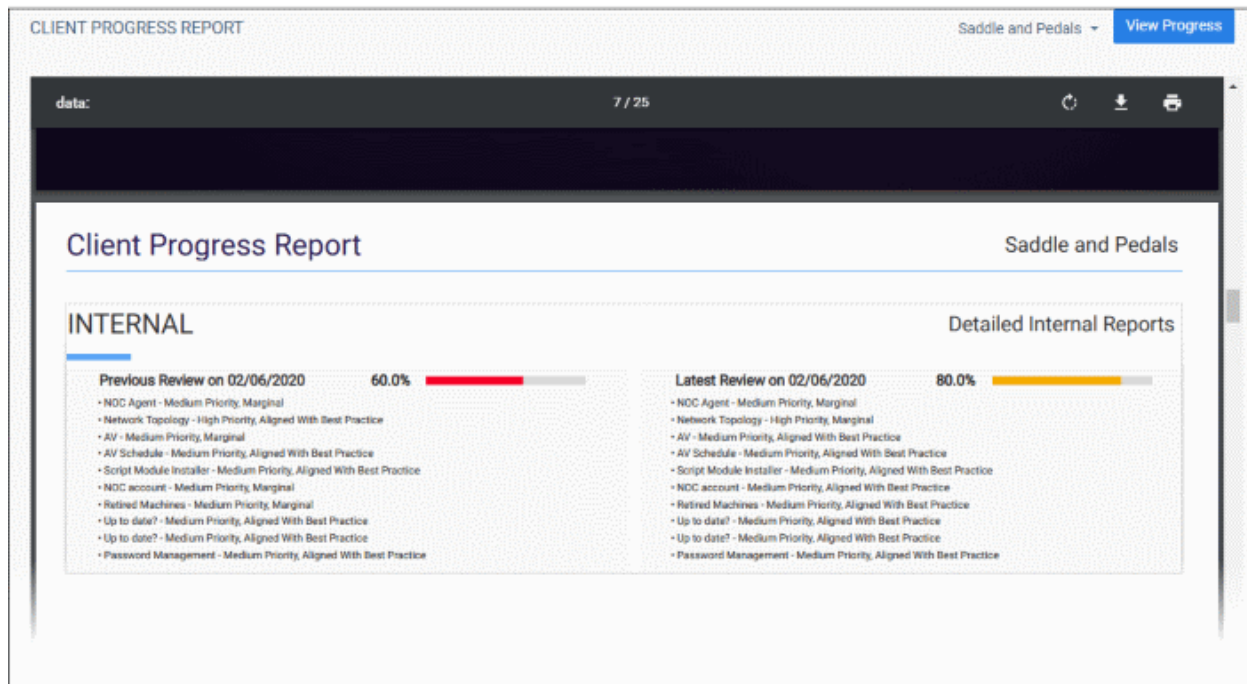
Client Progress Report

The progress report shows the differences between the two most recent reports for a particular client. This, for example, helps you to see how many 'No' answers have been resolved in the time between the reports.

- Click 'Reports' > 'Client Progress Reports'

- **Select Client** – Select the target customer.
- Click 'View Progress'

- Last review is shown on the left side and the latest one on the right
- Scroll down the report to view all sections
- Click the download / printer icon to save the last two comparison reports

Example workflow:

- Click 'Reports' > 'Technology Assessment Report'
- Select your customer that you want to check
- Click 'View Reports'
- Download and open the latest report
- Check the items that require attention

- Create a new review (questionnaire) for the customer, using the same library of questions as last time.
- Update the answers as required. For example, because your client has completed certain tasks.
- Save and submit the new questionnaire.
- Click 'Reports' > 'Client Progress Report'.
- Select the client and click 'View Progress'.
- This generates a comparison of the last two surveys:

- The older review is shown on the left, the most recent on the right.