# KACE SYSTEM MANAGEMENT APPLIANCE (SMA) ONSITE QUICKSTART (5 DAYS)

The KACE SMA ONSITE QUICKSTART consists of all the Activities below:

## Planned Activities

The QuickStart Onsite service includes the core features plus up to four (4) optional features.

| KACE SMA QuickStart – Core Features | |
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| Initial Setup Configuration | ● |
| Product overview | ● |
| Agent provisioning | ● |
| Custom Inventory | ● |
| Intro to Self-Paced Training Library | ● |

| KACE SMA QuickStart – Optional Features | |
|---|---|
| Software Distribution | ○ |
| Patch Management | ○ |
| Scripting | ○ |
| Software Management | ○ |
| Assets | ○ |
| Server Monitoring & Agentless Inventory | ○ |
| Reporting (includes email notifications) | ○ |
| User Portal | ○ |

● = **core** ○ = **optional**

| Activity | Contains |
|---|---|
| Pre-Onsite On-Boarding session | 1. Quest will conduct one (1) onboarding session to:<br>   a. Plan and schedule the onsite week.<br>   b. Verify pre-requisites are completed before the onsite week begins. |
| *Planned Activities* | To complete Pre-Onsite On-Boarding session, Quest anticipates that it will:<br><br>1. Schedule and Perform a 1-hour WebEx meeting covering the following items:<br>   a. Define the up to four (4) optional features of interest and prioritize them in order of importance.<br>   b. Review the dependencies to complete the activities of both the core features as well as the optional features selected by the customer.<br>   c. Identify and schedule an agreed upon on-site week.<br>   d. Validation that the virtual KACE Appliance is powered up and accessible via a web browser |

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| *Dependencies* | 1. Virtual KACE Appliance imported and powered up using a supported virtual host such as VMWare or Hyper-V<br>2. Resource(s) with decision-making capabilities to define agreed upon onsite week and optional feature. |

| Feature | Contains |
| --- | --- |
| Initial Setup Configuration (Core Feature) | 1. We will assist with the initial setup configuration of the KACE SMA for the following general settings:<br>    a. Appliance settings<br>    b. System maintenance<br>    c. User Roles (up to 3)<br>    d. Basic LDAP Configuration (up to 3)<br>    e. Organizations (up to 2, if applicable) |
| *Planned Activities* | 1. To complete Initial Setup Configuration activity, Quest anticipates that it will:<br>    a. Assist with completing the initial setup wizard<br>    b. Assist with configuring the KACE Appliance to meet the security needs while following KACE best practices such as:<br>        i. Enabling LDAP Authentication<br>        ii. Enabling SSL<br>        iii. Configuring KACE Backup<br>        iv. Configuring User Roles |
| *Dependencies* | 1. Resource(s) with the decision-making capabilities as it pertains to completing the initial setup and configuration wizard as well as the appropriate rights/access such as:<br>    a. LDAP Credentials<br>    b. Ability to create/upload an official SSL Certificate (If Desired)<br>    c. Define User Role access rights |
| Product Overview and Discovery (Core Feature) | 1. We will provide a product overview of the KACE SMA user interface and the following general features:<br>    a. Organizations (if applicable)<br>    b. Security/Patching<br>    c. Reporting<br>    d. Service Desk<br>    e. Scripting<br>    f. Distribution<br>    g. Asset Management<br>    h. Monitoring<br>    i. Inventory<br>    j. Labels |
| *Planned Activities* | 1. To complete the Product Overview and Discovery activity, Quest anticipates that it will:<br>    a. Provide a general overview of all the capabilities of the KACE SMA<br>    b. Validate the desired Optional Features, and complete initial discover for each feature |
| *Dependencies* | 1. Resource(s) that will be acting as KACE admin |

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| Agent provisioning (Core Feature) | 1. We will provide an introduction around the KACE Agent<br>2. We will provide recommendations based upon best practices regarding agent provisioning strategy within your network<br>3. We will assist in the deployment of up to twenty-five (25) agents. The task can be completed via:<br>    a. IP range<br>    b. GPO<br>    c. Scripted agent installer | |
| *Planned Activities* | 1. To complete the Agent provisioning activity, Quest anticipates that it will:<br>    a. Provide a technical overview of agent functionality and environment requirements such as network ports<br>    b. Review KACE Agent provisioning options and define the best method<br>    c. Assist with enabling/configuring Agent Provisioning for the customer preferred method | |
| *Dependencies* | 1. Resource(s) with the decision-making capabilities as it pertains to how agent provisioning will be accomplished<br>2. Resource(s) with the appropriate rights to third-party solutions if the preferred provisioning method is GPO or 3$^{rd}$ party scripting | |
| Custom Inventory (Core Feature) | 1. We will provide an introduction to what Custom Inventory is and how to leverage it<br>2. We will assist with identifying software that might benefit from the creation of a custom inventory record<br>3. We will provide up to ten (10) pre-configured custom<br>    a. inventory objects useful for most environments | |
| *Planned Activities* | 1. Review what a custom inventory item is, when to use them, as well as how to create<br>2. Import the desired pre-configured custom inventory records selected by the customer | |
| *Dependencies* | 1. Resource(s) that will be acting as KACE admin | |
| Intro to Self-Paced Training Library (Core Feature) | 1. Access to the Self-Paced Training Library is included as part of your ongoing support subscription<br>2. We will provide an introduction of how to access the online library<br>3. With library content including training materials for all 'core' and 'optional' features listed within this QuickStart service offering, you will be able to:<br>    a. Learn and receive training on any 'optional' features not selected with your service<br>    b. Refresh and expand your knowledge on any 'core' or optional' features selected within your service | |
| *Planned Activities* | 1. Demonstrate the following to at least one resource who will be acting as a KACE admin<br>    a. How to find/access the training library<br>    b. How to launch/consume the training content | |
| *Dependencies* | 1. Resource(s) with Quest support credentials<br>2. Computer with internet access | |

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| Software Distribution (Optional Feature) | 1. We will provide an introduction to the Software Distribution feature<br>2. We will review your software deployment objectives and provide implementation support based on best practices<br>3. We will assist with the creation, configuration, and testing of the managed install process for up to five (5) standard applications that support enterprise deployment, such as:<br>   a. Techsmith Camtasia Studio™<br>   b. Oracle Java 7/8 Update<br>   c. Microsoft Silverlight<br>   d. Microsoft Visual C++ Redistributables<br>   e. Microsoft Office 2010/2013/2016<br>   f. Mozilla Firefox™<br>   g. Adobe Flash Player™<br>   h. Adobe Acrobat Reader™<br>   i. Adobe Acrobat™<br>   j. SonicWALL VPN Client<br>   k. Cisco VPN Client<br>   l. Autodesk Revit™<br>   m. (Other applications as determined)<br>4. We will demonstrate/provide knowledge transfer to your SMEs about managed installs that support:<br>   a. Windows™ installer<br>   b. Installers supporting scripting<br>   c. Installers supporting command-line switches<br>   d. Multi-file installers (ZIP)<br>5. We will assist with the creation and configuration of one (1) file synchronization<br>6. We will assist with the creation and configuration of one (1) software update processes<br>7. We will assist with the creation and configuration of up to two (2) software uninstallers for software that supports command line uninstalls<br>8. We will explain how Task Chains work and assist with identifying scenarios where this feature might be leveraged |
| *Planned Activities* | 1. Identify the goal and objectives of how your company plans to leverage the Software Distribution feature<br>2. Provide the needed knowledge transfer for how to use the Software Distribution feature both now as well as how to scale moving forward while following best practices<br>3. Complete the creation, configuration, and testing of:<br>   a. Up to five (5) industry standard application that supports enterprise deployment via the managed install process<br>   b. One file synchronization task<br>   c. One software update process<br>   d. Up to two (2) software uninstall task for software that supports command line uninstalls<br>4. Provide an As-Built document for the Software Distribution deliverables listed |
| *Dependencies* | 1. Resource(s) with decision-making capabilities as it pertains to your Software Distribution needs<br>2. Access to desire software media and/or download portal |

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| | 3. License keys and registration information for software titles selected that have said requirement<br>4. Access to either physical or virtual machines for testing purposes |
| Patch Management (Optional Feature) | 1. We will provide an introduction to the Patch Management feature<br>2. We will review current patching practices with your SMEs and provide implementation support based on best practices<br>    a. We will assist with configuration of your Patch subscription<br>    b. We will assist with the creation of up to ten (10) Patch labels<br>3. We will assist with the creation and configuration of up to two (3) patch management schedules<br>4. We will explain how Task Chains work and assist with identifying scenarios where this feature might be leveraged |
| *Planned Activities* | 1. Identify the goal and objectives of how your company plans to leverage the Assets feature<br>2. Provide the needed knowledge transfer for how to use the Assets feature both now as well as how to scale moving forward while following best practices<br>3. Complete the creation, configuration, and testing of:<br>    a. Patch Download<br>    b. Patch Subscription<br>    c. Up to ten (10) patch labels<br>    d. Up to three (3) patching management schedules<br>4. Provide an As-Built document for the Patch Management deliverables listed |
| *Dependencies* | 1. Resource(s) with decision-making capabilities as it pertains to your Patch Management needs |
| Scripting (Optional Feature) | 1. We will provide an introduction to the Scripting feature<br>2. We will review current scripting practices with your SME's and provide an implementation based on best practices.<br>3. We will assist with the creation and configuration of up to three (3) script leveraging the configuration/security policy feature.<br>4. We will assist with the creation and configuration of up to two (2) custom script with up to three (3) tasks, making use of:<br>    a. Verify<br>    b. Success<br>    c. Remediation<br>    d. On Remediation Success<br>    e. On Remediation Failure<br>5. We will explain how Task Chains work and assist with identifying scenarios where this feature might be leveraged |
| *Planned Activities* | 1. Identify the goal and objectives of how your company plans to leverage the Scripting feature<br>2. Provide the needed knowledge transfer for how to use the Scripting feature both now as well as how to scale moving forward while following best practices<br>3. Complete the creation, configuration, and testing of: |

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|  | a. Up to three (3) configuration/security policy feature scripts<br>b. Up to two (2) custom script each with up to 3 tasks<br>4. Provide an As-Built document Provide an As-Built document for the Scripting deliverables listed |
| *Dependencies* | 1. Resource(s) with decision-making capabilities as it pertains to your Scripting needs |
| Software Management (Optional Feature) | 1. We will provide an introduction to the Software Management feature<br>2. We will assist with the configuration of up to five (5) metering titles<br>3. We will assist with configuration of up to ten (10) software titles for typical licensing<br>4. We will assist with the configuration of up to five (5) software titles for application control |
| *Planned Activities* | 1. Identify the goal and objectives of how your company plans to leverage the Software Management feature<br>2. Provide the needed knowledge transfer for how to use the Software Management feature both now as well as how to scale moving forward while following best practices.<br>3. Complete the creation, configuration, and testing of:<br>    a. Up to five (5) meter software titles<br>    b. Up to ten (10) software titles for license compliance<br>    c. Up to ten (10) patch labels<br>    d. Up to five (5) software titles for application control<br>4. Provide an As-Built document Provide an As-Built document for the Software Management deliverables listed |
| *Dependencies* | 1. Resource(s) with decision-making capabilities as it pertains to your Software Management needs<br>2. Software entitlement data (i.e., proof of purchase) |
| Assets (Optional Feature) | 1. We will provide an introduction to the Assets feature<br>2. We will assist with designing and documenting a lifecycle management process which includes:<br>    a. Criteria to justify asset tracking<br>    b. When the lifecycle begins (i.e., cradle)<br>    c. When the lifecycle ends (i.e., grave)<br>    d. What are the require states to support the asset lifecycle<br>    e. What/when are the required touch points<br>3. We will assist with the creation of up to three (3) custom Asset Types each with up to ten (10) custom fields<br>4. We will demonstrate one (1) import asset function from an existing CSV spreadsheet using the Asset import wizard containing up to two thousand (2000) rows of data<br>5. We will review asset import practices with your SME's and provide support during the engagement based on best practices. |
| *Planned Activities* | 1. Identify the goal and objectives of how your company plans to leverage the Assets feature<br>2. Provide the needed knowledge transfer for how to use the Assets feature both now as well as how to |

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| | | scale moving forward while following best practices. |
| | | 3. Complete the creation, configuration, and testing of: |
| | |     a. Asset lifecycle statuses |
| | |     b. Up to three (3) custom asset types each with up to ten (10) custom fields |
| | |     c. Upload of up to two thousand (2000) rows of customer-provided asset info for one (1) Asset Type |
| | | 4. Provide an As-Built document for the Asset deliverables listed |
| | *Dependencies* | 1. Resource(s) with decision-making capabilities as it pertains to your Software Distribution needs |
| | | 2. CSV file containing asset information |
| Server Monitoring & Agentless Inventory (Optional Feature) | | 1. We will provide an introduction to the Server Monitoring and Agentless Inventory feature |
| | | 2. We will assist with the configuration of up to five (5) supported Operating Systems for monitoring using standard Log Enablement Packages (LEPs) |
| | | 3. We will assist with the configuration of up to three (3) devices for agentless inventory. |
| | *Planned Activities* | 1. Identify the goal and objectives of how your company plans to leverage the Server Monitoring and Agentless feature |
| | | 2. Provide the needed knowledge transfer for how to use the Server Monitoring and Agentless feature both now as well as how to scale moving forward while following best practices |
| | | 3. Complete the creation, configuration, and testing of: |
| | |     a. Up to five (5) supported Operating Systems for monitoring using standard Log Enablement Packages (LEPs) |
| | |     b. Up to three (3) devices for agentless inventory |
| | | 4. Provide an As-Built document Provide an As-Built document for the Asset deliverables listed |
| | *Dependencies* | 1. Resource(s) with decision-making capabilities as it pertains to your Server Monitoring & Agentless Inventory needs |
| | | 2. Authentication information for devices you wish to inventory Agentless |
| | | 3. Authentication information and server details for devices you wish to monitor |
| Reporting (Optional Feature) | | 1. We will provide an introduction to the Reporting feature |
| | | 2. We will assist with building up to ten (10) custom reports using the SMA reporting wizard |
| | | 3. We will assist with configuring up to five (5) report email delivery schedules |
| | | 4. We will provide up to five (5) email notifications |
| | *Planned Activities* | 1. Identify the goal and objectives of how your company plans to leverage the Reporting feature |
| | | 2. Provide the needed knowledge transfer for how to use the Reporting feature both now as well as how to scale moving forward while following best practices. |
| | | 3. Complete the creation, configuration, and testing of: |
| | |     a. Up to ten (10) custom reports using the SMA reporting wizard |

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|  | b. Up to five (5) report email delivery schedules<br>c. Up to five (5) email notification<br>4. Provide an As-Built document Provide an As-Built document for the Reporting deliverables listed |
| *Dependencies* | 1. Resource(s) with decision-making capabilities as it pertains to your Reporting needs |
| User Portal (Optional Feature) | 1. We will provide an introduction to the User Portal feature<br>2. We will assist with the creation and configuration of up to five (5) Knowledge Base (KB) articles<br>3. We will assist with the creation and configuration of one (1) of each type of Portal Application:<br>    a. Download<br>    b. Script<br>    c. Software Installer |
| *Planned Activities* | 1. Identify the goal and objectives of how your company plans to leverage the User Portal feature<br>2. Provide the needed knowledge transfer for how to use the User Portal feature both now as well as how to scale moving forward while following best practices.<br>3. Complete the creation, configuration, and testing of:<br>    a. Up to five (5) Knowledge Base (KB) articles<br>    b. One (1) of each type of Portal Application:<br>        i. Download<br>        ii. Script<br>        iii. Software Installer<br>4. Provide an As-Built document Provide an As-Built document for the User Portal deliverables listed |
| *Dependencies* | 1. Resource(s) with decision-making capabilities as it pertains to your User Portal needs |

## Prerequisites and Assumptions

We have made the following specific assumptions while specifying the services detailed in this service description:

- This service description is available is certain countries. Please speak to your account manager for selected countries.
- We consider additional travel to other locations out of scope and such travel will require your approval via the change control process detailed herein.
- We are not responsible for resolving compatibility or other types of issues that cannot be resolved by the manufacturer, or for configuring hardware or software in contradiction to the settings supported by the manufacturer.
- We are not responsible for project or service delivery delays caused by your facility or personnel challenges.
- Completing transition within the agreed timeframe is contingent upon us receiving your necessary information and gaining access to your necessary resources, personnel, and facilities in a timely manner.
- Any timescales or plans presented in this service description assume that you provide any required information and fulfills its other obligations as described herein in a timely manner.
- Your network infrastructure is stable and is the same across all its sites.

Excluded services:

- Both Quest and you acknowledge that the following activities are not included in the scope of this service description:
- Any services or activities other than those specifically noted in this service description
- Complete or 100% configuration of all modules associated with system management and/or deployment

- Configuration of a scripted operating system installation (KACE Systems Deployment Optimized Deployment Consulting Service is available separately)
- Structured query language (SQL) coding to create custom ticket rules
- Complete implementation of a service desk solution
- Complete client agent provisioning
- Installation, set-up, or configuration of Active Directory, mail servers, network devices or other third party applications
- Use of KACE products in conjunction with unsupported version of operating systems, service packs, web browsers, or other third party products
- Configuration and administration of third party virtual infrastructure servers running a virtual KACE appliance
- We are not responsible for application malfunctions or conflicts between your applications

Customer responsibilities:
- You agree generally to cooperate with us in its delivery of these services, and agrees specifically to the following responsibilities:
- According to the project plan and prior to our engagement, you will designate in writing a single point of contact to ensure that all tasks are completed within the specified time. All services communications will be addressed to a Customer Contact.
- Failure to indicate a customer contact may result in an increase in project hours and/or length in schedule.
- You shall provide technical points-of-contact (Technical Contacts) who have a working knowledge of the enterprise components to be considered during the services. We may request meetings with Technical Contacts.
- The Customer Contact will have the authority to act for customer in all aspects of the service including bringing issues to the attention of the appropriate persons within your organization and resolving conflicting requirements.
- The Customer Contact will send any communication between Customer and Quest, including any scope-related questions or requests, through the appropriate Project Manager.
- The Customer Contact will provide timely access to technical and business points of contact and required data/information for matters related to the scope of service.
- Key customer contacts will attend meetings and deliverables presentations.
- The Customer Contact will obtain and provide project requirements, information, data, decisions and approvals within one working day of a request, unless both parties agree in writing to a different response time, and you agree that you are responsible for timeline and cost implications presented by any delays in this regard.
- You may be responsible for developing or providing documentation, materials, and assistance to us, and agrees to do so in a timely manner. We are not be responsible for any delays in completing its assigned tasks to the extent that they result from your failure to provide such timely documentation, materials and assistance.
- You will ensure the services personnel have reasonable and safe access to the project site, a safe working environment, an adequate office space, and parking as required.
- You will inform us of all access issues and security measures, and provide access to all necessary hardware and facilities.
- You are responsible for providing all hardware, software, internet access, and facilities for the successful completion of the services. Facilities and power must meet our requirements for the products and services purchased.
- Prior to our engagement, the following activities must be completed:
  - The Virtual KACE Appliance has been downloaded in imported into a Supported host "Hyper-V or VMware.
  - Your SMEs identified and available to work with the Quest engineer on the start date of the onsite engagement
  - Your SMEs have reviewed KACE administration guides, and taken guided tour of the KACE appliances
  - You have tested PXE and DHCP setup
  - You have procured OS media and product keys
- If you fail to meet its obligations as set forth in this service description, we may adjust the timeline or costs with notice to you to address such delays or failure to meet obligations.