



HOW-TO GUIDE

Passportal + Documentation Manager

Quick Start Guide for MSPs

Steps to begin the documentation journey.

MSPs lack standard practice related to documentation and how to capture internal data and customer information. This often leads to inaccessible and out-of-date data. As a result, IT technicians can waste significant time looking for information needed for their daily job, which is spread across various different devices and channels.

Additionally, leaving client data in the hands of specific employees can lead to considerable pain when the employee is unavailable or leaves the company. Client knowledge walks out the door— not documented and unavailable to the remaining techs who need to continue supporting clients.

Find things faster and decrease wasted time: A documentation management system helps reduce time searching for client knowledge. Regardless of primary technician availability or turnover, your team should be able to maintain consistent service delivery for your entire client base.

SolarWinds® Passportal + Documentation Manager lets you manage documentation with pre-built templates. It helps lower efficiency costs, enhance collaboration and productivity, and scale for profitable growth.

STANDARDIZE DOCUMENTATION PRACTICES

THE BASIC INFORMATION TO CAPTURE

- » Managed assets, devices, and systems. Connect assets to the clients they are deployed at, their location, and context.
- » Domain registrations, MX records settings, aliases for email, and SSL certificates for clients.
- » Applications and services, such as Active Directory® (or directory service), line of business applications and their licenses, system backups, email configurations, file sharing and collaboration, internet/WAN, LAN/VLAN, printing, voice/PBX, and wireless.
- » Passwords and credentials are required to manage those applications and services, the assets/devices that host them, and the vendors who manufacture and support them.

STRUCTURE YOUR STANDARD OPERATING PROCEDURES

- » Define the scope in the SOP and describe what needs to happen for an outcome.
- » Include detailed steps and information on who, when, and where.
- » Document all relevant details, such as new user setup, new workstation setup, firewall firmware update, system or data recovery, etc.
- » Test the SOP step-by-step to ensure clarity and accuracy.
- » Make “updating documentation” a final step in every SOP, related to system update process, new user setup, test data recovery, new server deployment, monthly checkup, quarterly business review, etc.

CENTRALIZE AND MAKE DOCUMENTATION EASILY AVAILABLE

- » Designate information as internal or external (client-facing) SOPs.
- » Tie documentation to credentials management and key files for efficiency gains.
- » Use templates, organize articles, and group them for easy access.

ALLEVIATE SUPPORT LOAD

- » Publish self-help articles on how clients can solve their own issues: for example, set up a new smartphone for email, connect to the IT system from home, how to change the printer toner, etc.
- » Make documentation easy to export, publish online, and/or send to customers.

ENSURE ONGOING MANAGEMENT OF DOCUMENTATION

- » Ensure client information is fully documented, safeguarded, and always accessible to the rest of the team.
- » Leverage version control for an understanding of what has changed over time, and get access to latest updated version.
- » Gamification: offer prizes for data entry.

30-day free trial and no term contracts

Want to learn more?

Email passportal@solarwinds.com or call us +1-888-870-7840 today.