

Flynn Sprake Financial Planning – IT Procedures

- **Xplan**- Lonsdale is our support network – any issues email the Lonsdale Xplan contact found in GoldMine.
- **Server / Computer / scanner/ Projector issues / Ricoh MP C307 printer**– dealt with via Microtech
SERVERS
 - We have 2 servers– **SBSERVER**- (smaller server)was originally purchased to host the Microsoft exchange server for email hosting and to be able to access email on mobile devices but when we trialled this with Microsoft Outlook it did not suit Goldmine and link all emails which were received and sent so we decided we did not need this. This server runs user accounts and user shared folders (H:\ drive) + some printing – this server was purchased on 31/10/2011. Currently running Office 2003 software which is no longer supported by Microsoft .
SERVER- (main server) runs goldmine and all the goldmine data and data folders + some printing. Unsure when this server was purchased. Currently running Office 2003 software which is no longer supported by Microsoft .
If we upgrade the server this will all be combined onto one server
There are a couple of spare computers in the office and can be switched around if necessary (if one breaks)
- **Goldmine** – support is 3cubed – email or call - emails need also to be linked so we can find any correspondence.
- **Xerox V2275** – support is Viatek

IT Support package (Microtech)

Flynn Sprake have pre-paid service agreement with Microtech it began on 10/09/2012 for 50 hours of support. When a service request is completed the units will come off this agreement. We receive monthly updates on usage and pre-paid hours remaining.

Computers, Server and internal support

Microtech –

If there is an issue with the server - call Justin Crook and he can remotely access computers and generally fix issues at the time. If a restart needs to occur there is a power button on the right hand side of the server – hold in for 5 sec and it will turn off – then restart the same way when completely shut down.

Quotes for new equipment and support are requested through microtech office

HP 4730 Printer, Scanner and Projector

Microtech – call and log maintenance call and they will send someone to have a look

Xerox printer

Viatek

Issues – call and log a support request

Quote no on top of the machine and they will get someone to have a look at it for us

Xplan Support

Lonsdale – email Lonsdale Xplan support for help

Wireless network connection

We have a wireless router – installed and serviced via microtech – call Justin to log issues.

Internal Network – Name: FlynnSprake – Pword:/ Key: F1ynnSpr4ke123!@#

External Network – Name :FlynnSprake-Ext – Pword:/ Key: Ext3rnal4FlynnSprake!

Emails and Website

Emails and Website are administered through Plannerweb (Peter Graham) and are paid for together. The domains – **flynnsprake.com.au** and **fsfp.com.au** are purchased through Melbourne IT on a 2 yr renewal basis last purchased in Oct 2014. Refer to contact on Goldmine.

The email hosting is completed through Plannerweb and they can be contacted for support.

The website is administered through Plannerweb also and they give us content and support.

Back up

Currently Flynn Sprake is using an External Hard Drive back up system which is monitored by our IT service providers – Microtech - The equipment is a Buffalo terra station. We use a separate hard drive for each day of the working week and is changed each day by the receptionist. It is to be taken offsite in case of emergency each day by the Office Manager.

The individual drives hold 2 weeks' worth of data and the Buffalo terra Station holds 3 months' worth of data which is taken in snapshots every hour on each work day.

We also do a monthly back up which is taken off site by the office Manager or a Director for a year in case a client file is accidentally deleted we can get back the data from last year. The monthly back up tape is to be changed on the first day of the month.

Restore

The process to follow if you have an issue with lost data would be to discuss it with the Office manager and contact Microtech. You will need to be able to tell them the file path and from which date you need a file restored.

Hardware

- Maintain Register of Equipment on the Office Furniture & Equipment Listing
<S:\ADMINISTRATION\Furniture Equipment & Stationery register\Office Furniture- Equipment Register>

Computers

Computers were last updated in Oct 2011. Generally these are updated when the warranty runs out (3 yearly)– It may be a possibility to update the hard drives in the current computers and keep them running for a lot longer. Microtech would do the updates. Call them for quotes and information / and shop around for other deals.

Printers – HP 4730

Serviced through Microtech – not on contract

Xerox C2275

Serviced through Viatek – On monthly contract

Scanner

Serviced through Microtech – not on contract

Projector

Serviced through Microtech – not on contract

Software

Upgrades

Generally done as necessary

Software can be updated through microtech if you need their help

Goldmine updated through 3 cubed and are advised of when new releases come out – we tend to only update when we start to have issues or a new feature is available.

Xplan is online so updates will happen a Lonsdale request and they will notify us via email.

Telephone System

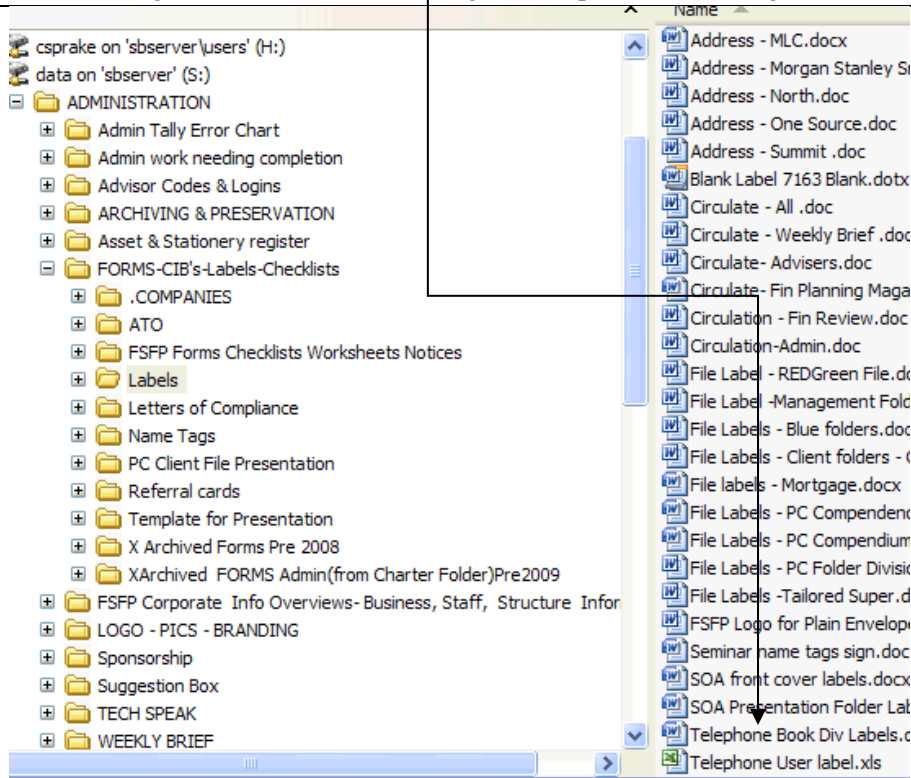
The Telephone System is Panasonic Hybrid IP PBX. It was installed by RIC Electric. The maintenance for it was done by RIC Electric but we are moving over to Advanced Communications. Their contact details are on GOLDMINE. The User manual is stored in the small safe along with software discs.

<i>Accessing the Software on Server</i>	<ul style="list-style-type: none"> • Go to Green Screened Server • Click on Panasonic folder • Double Click PBXUnified • Click on Connect – making sure USB is checked • The password is saved but it is 1234 • There are 3 sections to this <p>+2 System</p> <p>+4 Extension</p> <p>+6 Feature</p>
+2 System	<p>Contains</p> <ol style="list-style-type: none"> 1. Date\Time\Daylight Savings # 2. PBX Operator
+4 Extension	<p>1. Wired Extensions</p> <p>Contains :</p> <ol style="list-style-type: none"> 1 <u>Extension Settings</u> * 2 <u>FWD/DND</u> 3 <u>Speed Dial</u> (This is for personal speed dials (i.e. per telephone handset)) 4 <u>Flexible Key</u> 5 <u>PF Key</u>
	<p>2. Portable Station</p> <p>Contains :</p> <ol style="list-style-type: none"> 1 <u>Extension Setting</u> 2 <u>FWD/DND</u> 3 <u>Flexible Key</u>
	<p>3. DSS Console</p> <p>Contains :</p> <ol style="list-style-type: none"> 1 <u>Main</u> 2 <u>Flexible Key</u>
+6 Feature	<p>Contains</p>

	1 Speed Dial ** 2 Absent Message 3 Charge
To change Time Date on the system##	If you need to get accurate time to update the system call 1194 and it will give you the exact time.
To update User Details on Panasonic System *	This is where you alter the Extension #'s for users based on desk locations. NB Staff info book will also need updating.
To update System Speed Dial **	This is the location for whole system based speed dials and Staff info book will also need updating. The Flynn Sprake listings for Speed dial begin at 300.

Labelling the phones:

- Go to S:\ADMINISTRATION\FORMS-CIB's-Labels-Checklists\Labels
- Click on Telephone User Labels
- Edit details as to seating position or extension
- Print and replace on each handset
- These changes will also need recording in the Speed Dial Listing for Staff Info Booklet



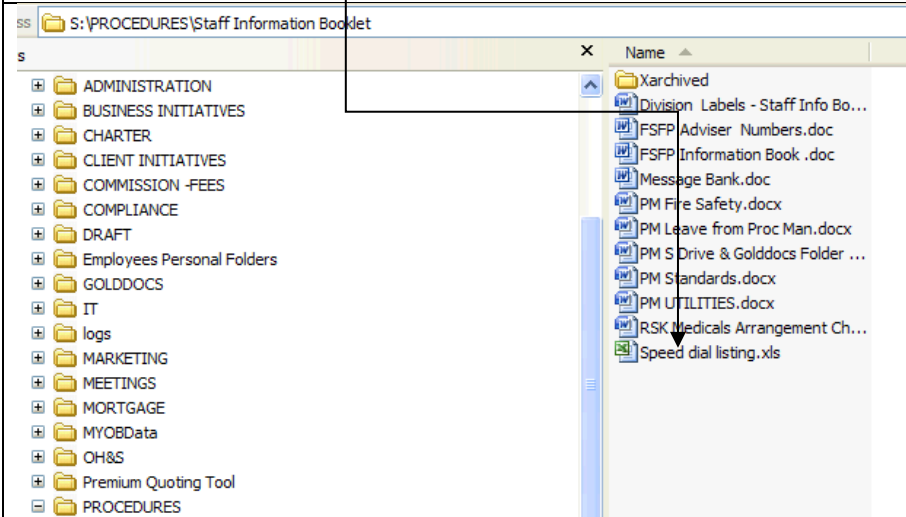
Updating Speed Dial Listing in Staff Information Booklet

-Go to S:\PROCEDURES\Staff Information Booklet

-Open Speed Dial Listing .xls

-Edit any changes needing to be made

-Make sure you highlight what you have change on a hard copy as you will need to go to the system and update it at the same time



Website

Website Editing (Seminars & Latest News Only)

Following this note is a list of SoW ID numbers followed by instructions on how to start using the new more powerful SoW module connected to your new Web Site. This means you now have the ability to add articles, pictures, links, etc, easily, simply and in a timely manner sections of your new web site so that clients are better informed and most current costs of information distribution are saved. To access the SoW module for editing purposes and look at the results of your work you need the following information.

SoW #1 ID: 726 (Latest Financial Planning News)
Password: wagga (this can be changed to anything you want)

SoW #1 ID: 727 (Seminars)
Password: wagga (this can be changed to anything you want)

Site Address: <http://www.flynnsprake.com.au>

You'll find using SoW very easy and the results, including better informed customers and the chance to minimise costs currently associated with things like Flyers etc., well worth the effort.

Adding articles to your Latest News Site using AcctWeb's new and unique SoW technology.

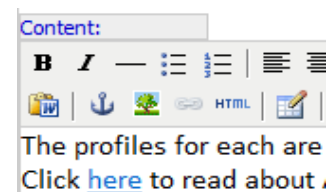
1. Using your Browser go to the URL: <http://sow.acctweb.com.au/articles/manager.php>
2. At the SoW Articles Administrator login screen type in your ID number and Password (supplied in the covering letter).
3. You will now see a screen titled Create New Article and are asked for Article Title and Article Description. The first is what the client sees on your Site in a list of articles, while the second is the description used in the article's header. They are usually the same but can be whatever you want.

4. Following is where you enter the body of the article. For this you can type information in directly or cut and past from another document. The latter, for example, could be an article or piece of information a Partner wrote last night and sent to you via e-mail. If necessary adjust for formatting.
5. Tip: Keep the articles on the short side as it enhances reader acceptance, though you can add huge amounts of information if you like. Each article is added separately and can be done hourly, daily, weekly, monthly, whenever. What you add here can be seen immediately on your Latest News Site after you've clicked on Add Article (see below).
6. Next choose to nominate if the article is a 'Hot' issue or not by answering Yes or No at the next window. If 'Yes' then a separate Group of articles is added to your Site titled 'Hot Issues'.
7. Finally change the date if need be or accept it as it is, then click on Add Article. After a few seconds the article is added to the list at the bottom of the screen and is from then on able to be viewed on your Site as well.
8. If you wish to edit, display or delete an article simply log back onto the SoW Articles Administrator and choose the article you want to amend from the list provided.
9. Do some testing to ensure you understand the above. Anything you add during this process can be deleted again just as easily.
10. Adding an Article is half the battle as the purpose of adding the information is to advise your clients of something they should know. To do this you need to tell them what you've done and, in turn, to do that you need to use your e-mail system in the following way.
11. Firstly though, read the 12 page document from AcctWeb covering how to integrate a Latest News site into your Practice as this sets out several tasks and roles that need to be completed to ensure your SoW begins to generate the results it should. This document will have been sent soon after your placed your initial order but if a copy is not at hand we can forward another.
12. However to précis this document: you need to establish a group, groups eventually, that encompasses your clients' e-mail addresses. After adding one or more articles you will go to your e-mail program and generate a small 2-3 line e-mail. This is then forwarded to all members of your mail group 'clients'.
13. Within an hour or so clients will have begun reading what you, as their Accountant, know they should be aware of.
14. Over time you might start adding information for particular sets of clients so add an article for them and e-mail only them. You will also add information about things such as the need to get Tax Returns in (perhaps as a Hot Issue) or the dates for important Seminar you are running. There is no limit to what you can add and always your clients will be aware of it soon after.
15. Finally, all articles added will be Archived automatically after one month (you can have a three month period if preferred) but will still be displayed for clients to view.

SoW begins to make your Web Site the great marketing and business tool it will become.

To Attach Documents to Website

1. Sign in to **SoW** (*details above*)
2. Click on '**File Uploader**' in the top left hand corner →
3. Browse to find the file needing uploading
4. Once uploaded, copy the link to the file at the bottom of the page, <http://flynnsprake.com.au//docs/filename>
5. Go back to the SoW content page
6. Within the content section right click the word '**here**', → then click the chain link icon '🔗'
7. Paste the copied link to **Link URL** and delete the file name and put in the actual file name of the document saved.



8. Change to open new window
9. Change the title to the name of the document

Website Hits and Manage Email Accounts etc

You can view all the site information if you log onto your C panel. This feature can be found in the "logs" menu under the AWstats Icon. AWstats produces visual statistics about Visiplantors of your site.

To manage a number areas of this domain such as e-mails then use the following Cpanel logon information:

Go to: www.flynnsprake.com.au/cpanel
Username: fly33187
Password: gurw00d

Email Address Creation

Log into the C Panel using the log on information as above. On the front page under the subsection: **Mail**

- Click on "Email Accounts"
- Up the very top of this page you will see a grey box. This is where you create your new email address
- Under Email, enter the email address you would like to create. Here at Flynn Sprake we use first initial and last name for the email address e.g. rsmith@flynnsprake.com.au.
- For the password, it is always gurw00d. Enter again to confirm.
- The default MB size of 250, change this to 30MB. This is the minimum for a new email account. If it is being used with high traffic, you can increase the size. But start with 30MB.
- Click on "Create Account".
- Your email address is now created. Please refer to GOLDMINE email procedures on how to set it up in Goldmine.

Spam Inbox Clearing

You can view the spam inbox by logging onto the Cpanel using the log on information as above.

- click on "Email Accounts"
- Then scroll down and click to go to next page
- Scroll down and find spam@flynnsprake
- Click on "more"
- It will drop down with a menu, click "Access Webmail"
- It will then open with a new window and ask for a password
- Type in "gurw00d"
- It will then prompt you which system you would like to open in
- Click "read using squirrelmail"
- The inbox will then be shown
- Click "show all"
- When all spam has been checked click "Select All"
- Click "Delete"

The spam inbox has now been cleared.

Updates to Web Page

Periodically PlannerWeb send through emails notifying us of changes or updates to the website. Treatment of these emails and their linking are described in the following location:..[\Duty Statements\DUTIES - Reception Daily Checklist.docx](#)