workplace wealth_

THE SECURE DIGITAL HUB FOR FINANCIAL PROFESSIONALS

EXTERNAL IT

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Aggregates your IT — all your apps and data — in a centralized cloud where they can be secured and controlled, while providing employees the flexibility to access all their tools and information from any device, anywhere.

FEATURES	COMPONENTS	
Storage & Applications All of your business applications, files & emails hosted in our cloud	• Standard Business Apps • Microsoft Office 365 • 50 GB File Storage per User	• 25 GB Mailbox per User • Application Updates
Security & Backup Benefit from the highest levels of security and features that exceed regulatory requirements and keep your data safe	• Tier 3/4 Data Centers • 2 Factor Authentication • Secure Single Sign On for Web Apps • 30 Day Rolling Backup	• 7 Year File Retention • Secure File Sharing • Device Access Management • Web Filtering
Disaster Recovery All of your email, files and application data running in 2 data centers, simultaneously	• Hot/Hot Failover • Immediate Access to Email, Files & Standard Business Apps	• Custom Application Support Available • DR Testing
Devices & Local Services Management of your local environment and network	• Desktop & Laptop Management • Anti Virus, Patching & OS Updates	• Management of Connectivity, Routers & Firewall • Mobile Device Support • Printer Support
Helpdesk Support Premium dedicated support team who understands your business and your apps	• 24 x 7 x 365 Support • U.S. Based Helpdesk • Dedicated Client Relationship Manager	• Dedicated Team Offering Individualized Support

LOCAL SERVICES

ON-SITE SUPPORT

Local Laptop & Desktop Management

- Automated Windows & MS Office Patch Management
- Health and Performance Monitoring
- Active Device Validation & Management
- Anti-Malware & Anti-Virus Protection

Proactive Local Network Management

- Local Device Installed Onsite
- Firewall / Router / Switch Management
- Equipment Troubleshooting
- Proactive Monitoring & Reporting
- ISP Management

ADDITIONAL SERVICES

Security Awareness Training

A highly effective way to educate employees using realistic phishing simulations and both required and on-demand interactive security awareness training sessions.
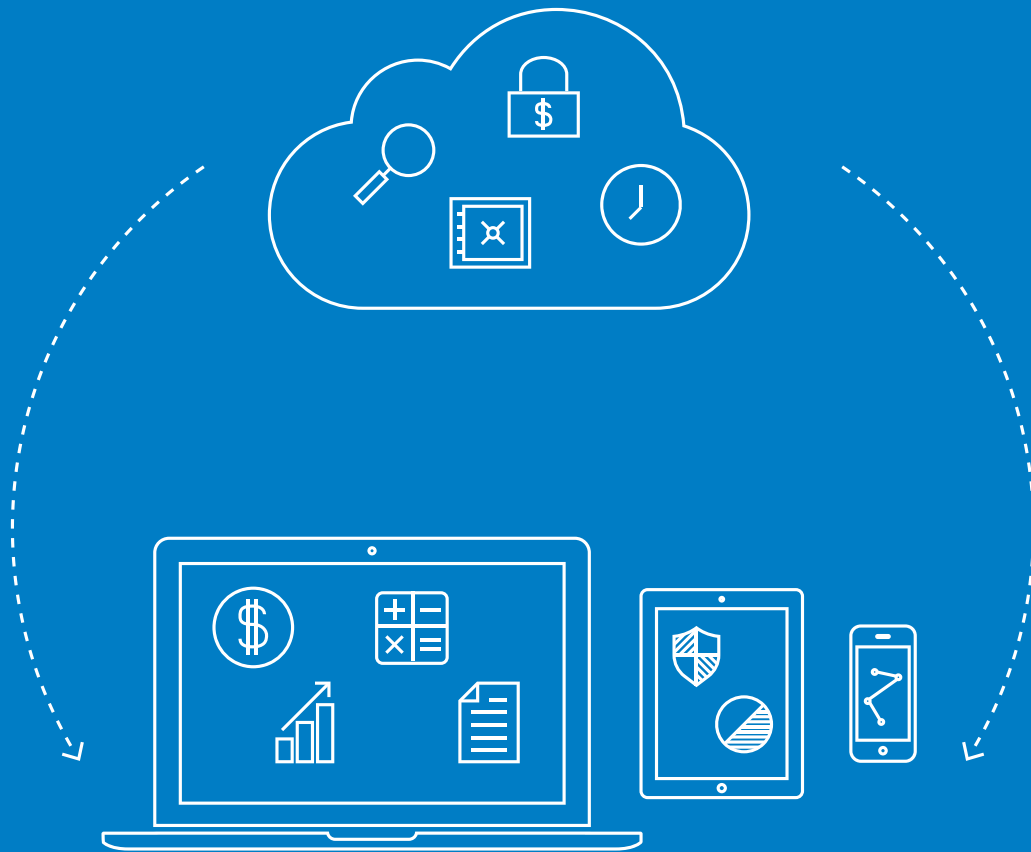
IT Policy Composition & Annual Review

Development of a comprehensive IT policy for the firm, as well as annual review of the policy.

IT Governance

Design and implement operating models that minimize technology risk.

NOTABLE FEATURES

Login with Authentication

Single Sign-On to Web Apps

24 x 7 Network Operations Center (NOC)

Data Backup & Replication to Secondary Site(s)

Live US-based Technical Support for All Users

Integration with Microsoft Office 365

Host Any Business Application(s)

EMAIL US
SALES@EXTERNALIT.COM

CALL US
800 646 0700

VISIT US
EXTERNALIT.COM