Request AWS Server Spin Up

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Purpose

The purpose of this document is to provide resources with the steps to request the spin-up of a new AWS server for new customer implementation projects, or on-prem to cloud migrations.

The Infrastructure team will spin up all AWS servers, however, these resources may not have access to TaskRay to schedule tasks or track time. Therefore, a case is created to request the server.

Once the server is spun up, a Professional Services Technician is then scheduled to install the Bold Group application on the new server.

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Prerequisites

Before requesting the server spin-up, the customer should have returned the appropriate SedonaOffice New User Listing template populated with their specific user information. This template should have been sent as part of the project kick-off call recap for the customer to populate and return.

The project should have the following tasks

- Confirm TSPlus and Advanced Security items purchased align with user counts
  - See TSPlus License Request
- Request AWS Server Spin Up
  - Project step to schedule and track requesting the server by the PM and any related notes/time required to request it
  - Resource: PM
- AWS Server Spin Up
  - Project step to schedule and track the work to spin up the server and any related notes/time required to complete the setup
  - Resource: PM

- Duration:
    - Communal - 4 to 6 hours
        - Typically, under 50 users
    - Dedicated - 12-16 hours
        - Customers with 50 or more concurrent users
- Timeline: same-day turnaround

- Request User Setup from the Cloud IT team
    - Project step to schedule and track work to create user accounts and DUO enrollments for customer's users
    - Resource: PM
    - Duration: 4 hrs
    - Attachment: Customer's user listing
    - Timeline: Depends on the caseload of the Cloud IT team

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TSPlus License

Before the server for a SedonaOffice customer can be fully spun up, a TSPlus License is required to be installed. SedonaOffice cannot run in a virtual environment on its own, it requires an additional solution, TSPlus. It is sold with an unlimited user count and requires the Advanced Security module purchase as well. This module allows the customer admin to whitelist their own users.

PM's will confirm the OAF/SOW include the correct number of server licenses based on the customers user count. Then Infrastructure will use the vendor website to procure the license.

See TSPlus License Request for more information on TSPlus licensing counts and ordering process.

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Requesting Server Spin Up

To request a new server, follow the steps below:

1. From the customer's account card, click Cases

2. Click New from the top right of the screen

3. Update the following fields:

    1. Secondary Case Owner = yourself

    2. Account Name = Enter the customer's name

    3. Contact Name = customer's contact person

    4. Case Origin = Support Center

5. Priority = Critical
6. Impact = Critical
7. Subject = Spin Up AWS Server for Product X User Count X (Total CountX)
    1. Where Product X = Bold Group application to be installed
    2. Where User Count X = Bold Group application user license count sold
    3. Where Total Count X = total customer should have after installing the newly purchased licenses
8. Description = Copy the Subject field and add the following notes
    1. TSPlus Advanced Security – Case for PO = (Case number for the PO where you requested the TSPlus advanced license)
    2. Update Secondary Case Owner by @mention
        1. When case closed
        2. Actual hours spent

4. Save the case
5. Open the case
    1. In the Related section, select Files and upload:
        1. The customer's User List to be whitelisted
    2. Change the case Owner
        1. Select Queues from the drop-down
        2. Select Infrastructure
        3. Click Change Owner
6. Copy the case number, adding it to the project task for the AWS Spin Up task to track progress

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Requesting User Setup

To request the user setup, follow the steps below:

1. From the customer's account card, click Cases

2. Click New from the top right of the screen
3. Update the following fields:
    1. Secondary Case Owner = yourself
    2. Contact Name = Customer's contact person
    3. Case Origin = Support Center
    4. Priority = Critical
    5. Impact = Critical
    6. Subject = Create user accounts and Duo Enrollment
        1. Where Product X = Bold Group application to be installed
        2. Where User Count X = Bold Group application user license count sold
    7. Description = Copy the Subject field and add the following notes
        1. User list in excel format attached with full name, email address, IP for whitelist, and IT/Admin users is attached
        2. AWS server spin up case # XXXX (from the previous task)
        3. Update Secondary Case Owner by @mention
            1. When case closed
            2. Actual hours spent
4. Save the case
5. Open the case
    1. In the Related section, select Files and upload the customer's User List to be whitelisted
    2. Change the case Owner
        1. Select Queues from the drop-down
        2. Select Cloud IT
        3. Click Change Owner
6. Copy the case number, adding it to the project task for the AWS Spin Up task to track progress

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Processing Server Spin-up and User Setup Cases

The following documents how the Infrastructure and Cloud IT teams will provide data to the PM to complete the project task within the case and the PM will transfer the information to the project task:

1. All comments and issues will be tracked within the case by the Infrastructure resource

2. Infrastructure resource will track actual time and @mention Secondary Case Owner (project PM) upon completion with the actual time required to complete the task

    1. This is for project budget tracking

3. PM will update the project task upon case closure:

    1. Enter the timecard for the resource that delivered the work

    2. Close the project task

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