



Service Plan Creator

Quick Reference Guide

Contents

Purpose of this Guide	2
Service Plan Creator Use Cases	2
Creating Service Plans and Service Catalogs.....	3
Step 1 – Create a New Service Plan	3
Step 2 – Assign Security Policies to Your Service Plan	4
Step 3 – Defining Reports Deliverables to be Included in the Service Plan	5
Step 4 – Creating a Service Catalog	7
Generating a Service Catalog Document	9
Generating a Service Plan Matrix Document.....	11
Generating a Sample Master Services Agreement for a Service Plan	13
Managing Service Plans	16
Modifying a Plan.....	16
Deleting a Plan.....	18
Managing Service Catalogs	20
Modifying a Catalog	20
Deleting (excluding) Service Plans from a Catalog	21
Adding Service Plans to a Catalog.....	22
Removing (deleting) a Service Catalog from the List of Catalogs.....	23

Purpose of this Guide

This guide is designed to provide an overview and specific steps required to use the Network Detective **Service Plan Creator**.

Other supplementary Guides to be referenced along with this guide include the Detector Quick Reference Guide and the Network Detective User Guide available at www.rapidfiretools.com/nd.

Service Plan Creator Use Cases

There are four use cases for the **Service Plan Creator**:

- Create **Service Plans** that are used to offer and deliver one-time Assessment Services
- Create **Service Plans** that leverage the Network Detective Detector to deliver an on-going Security Policy-based Service Offering to your customers using the Detector Appliance
- Create **Service Catalogs** used to produce a **Service Catalog** document in Word format. The purpose of the **Service Catalog** document is to enable you to produce marketing literature, sales proposals, and service agreements. The **Service Catalog** document presents:
 - a **Service Plan Matrix** of the plans you are proposing to a prospective client or customer
 - descriptions of the **Security Policies and Procedures** associated with each **Service Plan**
 - a list of reports deliverables for each of the proposed plans
- Generate a stand-alone **Service Plan Matrix** document in Word format summarizing the **Service Plans** you created

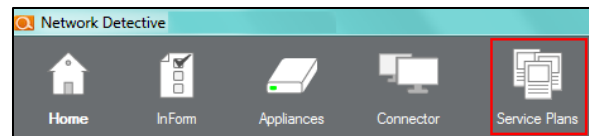
The next section outlines the steps necessary to create **Service Plans** and **Catalogs**.

Creating Service Plans and Service Catalogs

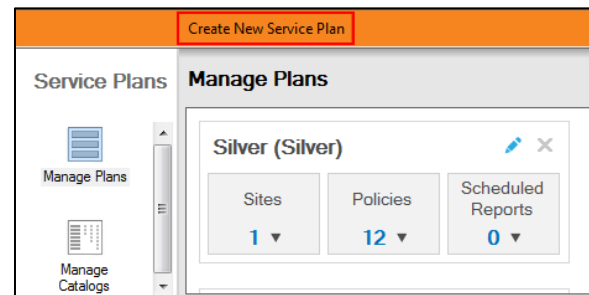
To **create** a new **Service Plan**, follow these steps:

Step 1 – Create a New Service Plan

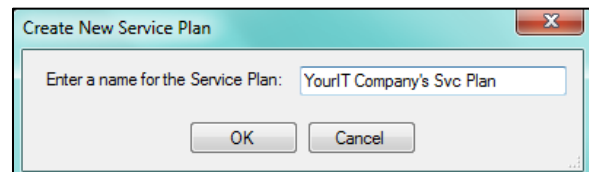
1. After successfully deploying Detector, visit www.rapidfiretools.com/nd to download and install the latest version of the **Network Detective Application**. Then run **Network Detective** and login with your credentials.
2. Select the **Service Plans** icon.



3. Select **Create New Service Plan**.



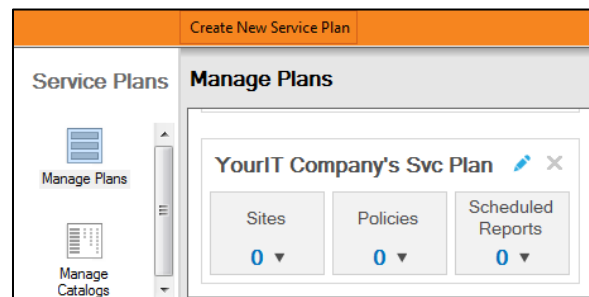
4. Enter the name for your **Service Plan**.



Select **Ok** to generate the basic **Service Plan** template.

Your **Service Plan** template will be displayed within the **Manage Plans** window.

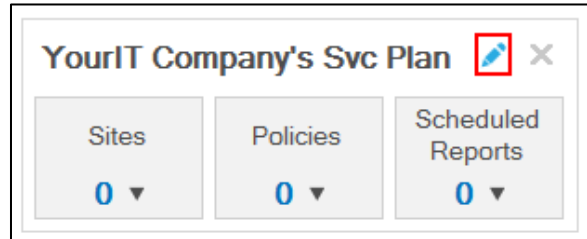
Note that the default **Service Plan** template does not have any Network Detective **Sites**, **Security Policies**, or **Scheduled Reports** specified.



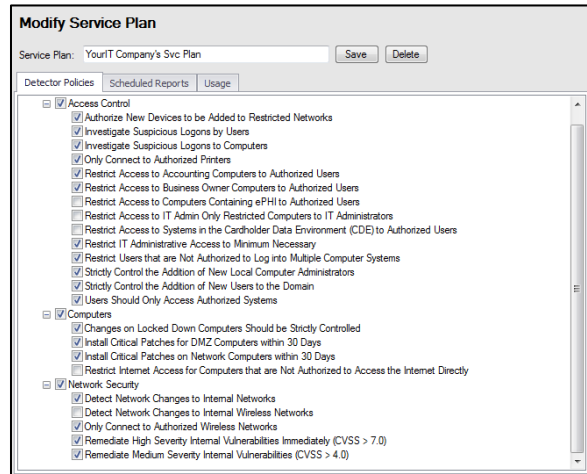
Before assigning the **Service Plan** to a Network Detective **Site** that is associated with a Detector, you will need to specify the **Service Plan's Policies** and **Scheduled Reports** requirements.

Step 2 – Assign Security Policies to Your Service Plan

1. Select the **Edit Service Plan** option to add the **Security Policy** assignments to the newly created plan.

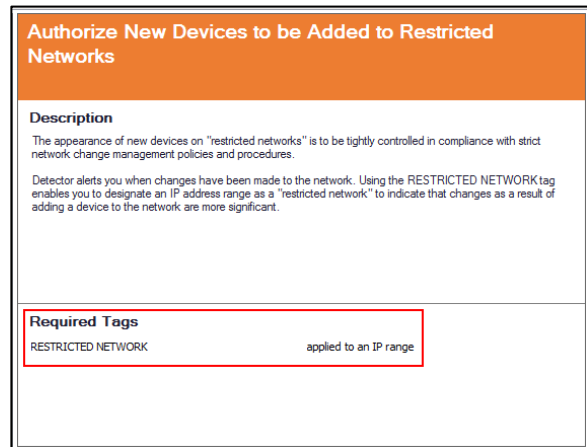


2. Select the **Security Policies** tab and select the policies that you want to assign to your **Service Plan**.

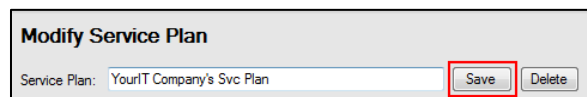


3. As you select the **Policies**, be sure to familiarize yourself with the **Smart Tags** descriptions presented.

For each **Security Policy** that requires a **Smart Tag** set up to be performed, the **Tags** associated with a given security policy will need to be configured to fully enable the Detector's **Security Policy Violation** detection.



4. After completing the selection of the **Policies** that you want associated with your **Service Plan**, select the **Save** button before you proceed to the next step.



Step 3 – Defining Reports Deliverables to be Included in the Service Plan

You have the ability to include references to one or more **Network Assessment** and **Security Assessment Reports** to be included as a part of your **Service Plan deliverables** to your customer.

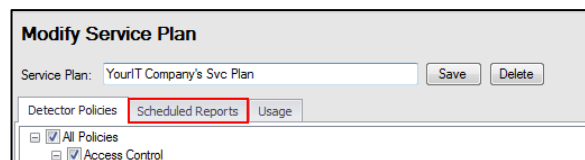
The **Reports** you select to be included in the **Service Plan deliverables** will be referenced in three places within Network Detective:

- the **Service Plan Scheduled Reports** window
- the **Service Catalog*** document generated by Network Detective
- the **Service Plan Matrix** document generated by Network Detective

*Note: The **Service Catalog** document will enable you to present an overview of your company's **Service Plan** to your clients.

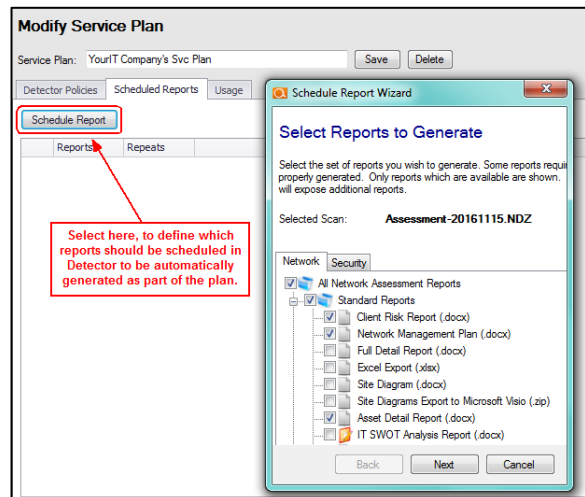
Follow these steps to define the **Reports deliverables** for your **Service Plan**.

1. Select the **Scheduled Reports** tab to plan and document the **Scheduled Report** runs associated with a given **Service Plan**.



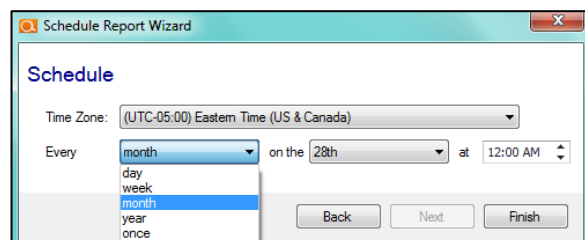
2. Select the **Schedule Report** button to define the **Reports** that should be part of the **Service Plan** you are creating.

You can define which **Reports** should be generated by Detector and at which **Intervals** (daily, weekly, monthly, etc.) the reports are to be generated.



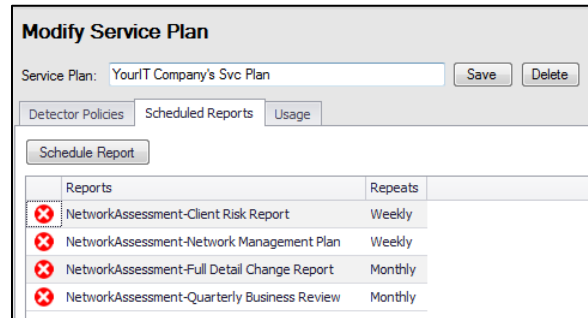
3. Select from the **Network** and **Security Reports** listed in the **Schedule Reports Wizard** window, and select the **Next** button.

4. Using the **Every** list control, select the frequency from the choices available (i.e. **day, week, month, year, or once**). Select the **Finish** button once your selections are complete.



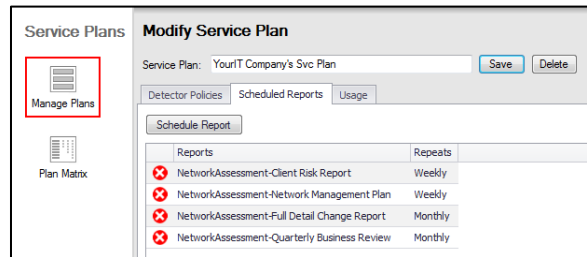
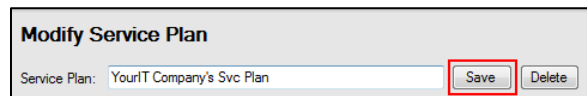
After you have selected the **Reports** that are a part of the **Service Plan**, and have assigned the frequency of **Report** generation, these reports will be listed in the **Scheduled Reports** window.

When a **Service Plan** has been assigned to a **Network Detective Site** used with a **Detector**, you can use the **Reporter Appliance** to schedule the actual automatic **Report** generation tasks to generate the reports deliverables for your service plans.



Note: When selecting a particular **Report**, or a group of **Reports** to be included in a **Service Plan**, you will need to define how frequently that the **Reports** are to be generated by your team as part of delivering your company's security service associated with the **Service Plan**.

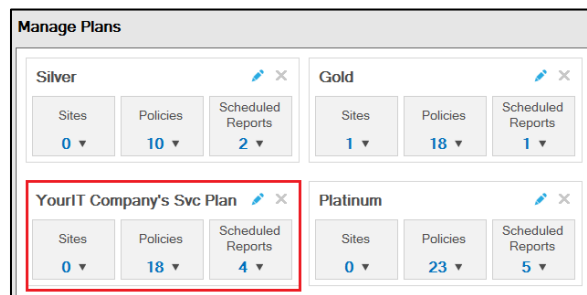
5. Select the **Save** button to save your **Service Plan Reports** selections and configurations.
6. Select the **Manage Plans** options to view a summary of your new **Service Plan**.



The **Manage Plans** window will list your newly created **Service Plan** and present the details associated with the plan.

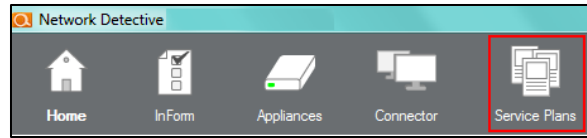
The details include the number of:

- **Network Detective Sites** that use the plan
- **Security Policies** assigned to the plan itself
- **Reports** that are to be generated and delivered to the customer as part of a particular **Service Plan**

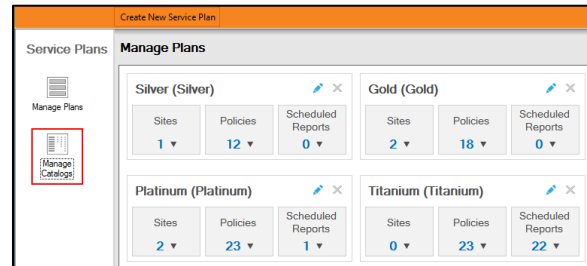


Step 4 – Creating a Service Catalog

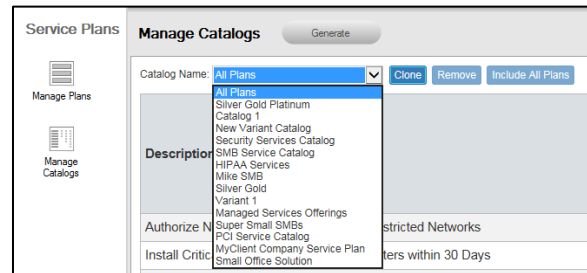
1. Select the **Service Plans** icon.



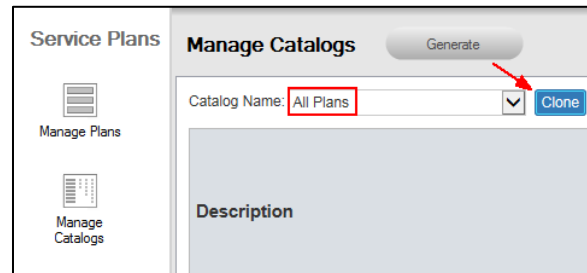
2. Select the **Manage Catalogs** icon.



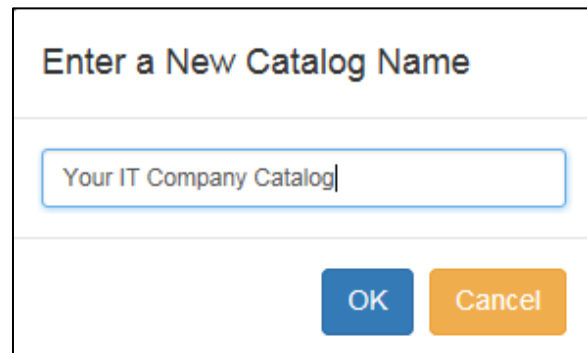
All of the available **Service Catalogs** will be available within the **Catalog Name** drop down list found within the **Service Catalog** window.



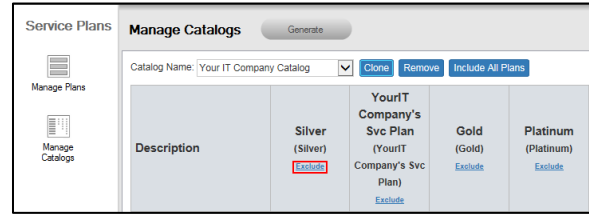
3. To create a new **Service Catalog**, select the default **Catalog** named “**All Plans**” and select the **Clone** button.



4. Enter in the **Catalog Name** and select the **OK** button to create the new catalog.

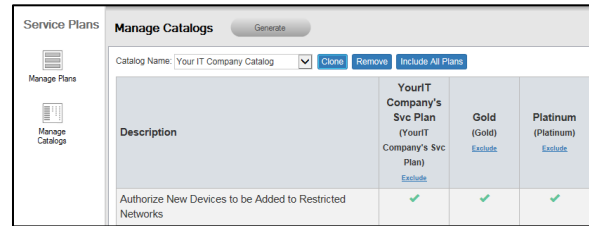


5. Select the **Exclude** option to hide each of the plans you do not want to be included in the **Service Catalog** document to be generated.



6. The remaining **Service Plans** not excluded from your new **Service Catalog** will be contained within the catalog.

The **Service Catalog** you created will be automatically saved for future use.



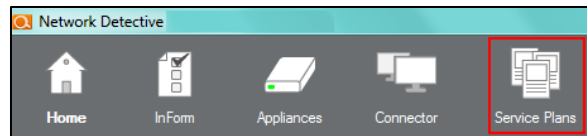
Generating a Service Catalog Document

After you have created a **Service Catalog**, you can use Network Detective to generate a **Service Catalog** document in Microsoft Word format.

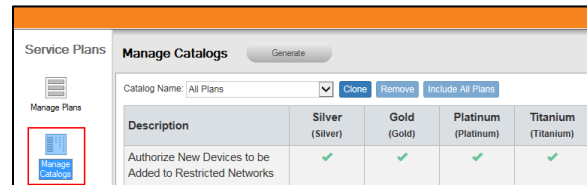
The **Service Catalog** document will contain a list of the **Security Plans** you have assigned to your **Service Catalog(s)** along with an overview of the **Service Plan Security Policies and Procedures**, and a list of **Reports deliverables**.

To generate the **Service Catalog** document, follow these steps:

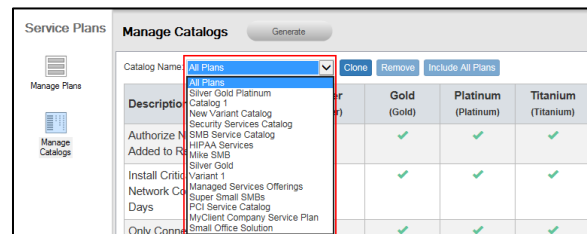
1. Select the **Service Plans** icon.



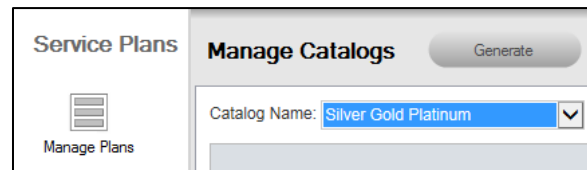
2. Select the **Manage Catalogs** Icon.



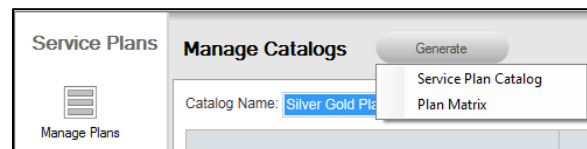
All of the **Catalogs** will be presented in the **Catalog Name** list.



3. To generate the **Service Catalog** document, select the name of the **Catalog** from the **Catalog Name** list.



4. Select the **Generate** and then select the **Service Plan Catalog** menu option to generate the **Service Catalog** document.



5. Network Detective will generate the **Service Catalog** document and open Microsoft Word so that you may edit and print the document.



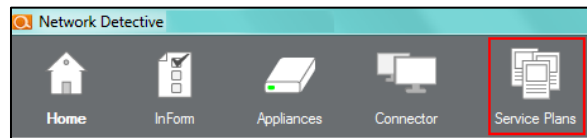
Generating a Service Plan Matrix Document

After you have created a **Service Plan**, you can use Network Detective to generate a **Service Plan Matrix** document in Microsoft Word format.

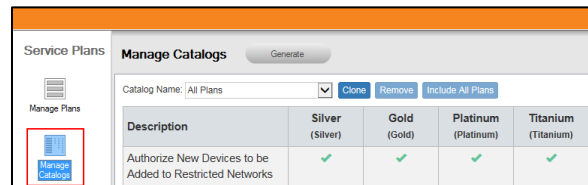
The **Service Plan Matrix** document will contain a list of the **Security Policies** you have assigned to your Service Plan(s) along with a list of **Reports deliverables**.

To generate the **Service Plan Matrix** document, follow these steps:

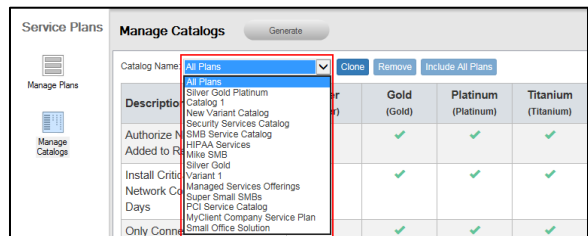
1. Select the **Service Plans** icon.



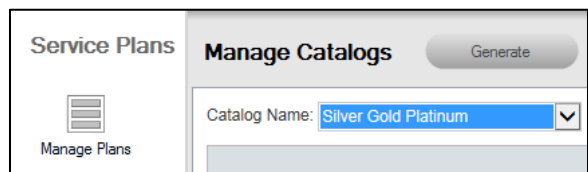
2. Select the **Manage Catalogs** Icon.



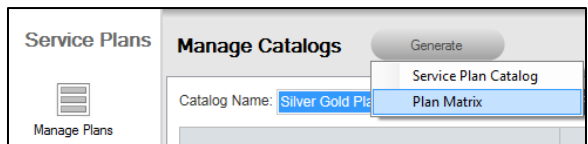
All of the **Catalogs** will be presented in the **Catalog Name** list.



3. To generate the **Service Plan Matrix** document for a specific **Catalog**, select the name of the **Catalog** from the **Catalog Name** list.



4. Select the **Generate** and then select the **Plan Matrix** menu option to generate the **Plan Matrix** document.



- Network Detective will generate the **Plan Matrix** document and open Microsoft Word so that you may edit and print the document.

The **Security Policies** associated with the **Plan** are in the document.

Policies		YourIT Company's Svc Plan
Policy		
Install Critical Patches on Network Computers within 30 Days		✓
Investigate Suspicious Logons by Users		✓
Investigate Suspicious Logons to Computers		✓
Authorize New Devices to be Added to Restricted Networks		✓
Only Connect to Authorized Printers		✓
Remediate High Severity Internal Vulnerabilities Immediately (CVSS > 7.0)		✓
Restrict Access to Accounting Computers to Authorized Users		✓
Restrict Access to IT Admin Only Restricted Computers to IT Administrators		✓
Restrict Access to Business Owner Computers to Authorized Users		✓
Restrict IT Administrative Access to Minimum Necessary		✓
Restrict Users that are Not Authorized to Log into Multiple Computer Systems		✓
Strictly Control the Addition of New Local Computer Administrators		✓
Strictly Control the Addition of New Users to the Domain		✓
Users Should Only Access Authorized Systems		✓
Changes on Locked Down Computers Should be Strictly Controlled		✓
Install Critical Patches for DMZ Computers within 30 Days		✓
Only Connect to Authorized Wireless Networks		✓
Remediate Medium Severity Internal Vulnerabilities (CVSS > 4.0)		✓
Detect Network Changes to Internal Networks		✓
Restrict Access to Computers Containing ePHI to Authorized Users		
Restrict Internet Access for Computers that are Not Authorized to Access the Internet Directly		
Detect Network Changes to Internal Wireless Networks		
Restrict Access to Systems in the Cardholder Data Environment (CDE) to Authorized Users		

And a list of **Reports deliverables** associated with the plan are referenced the **Report Tasks** section of the **Service Plan's Matrix**.

Report Tasks		YourIT Company's Svc Plan
Scheduled Reports		
Weekly	Network Assessment-Client Risk Report	✓
Weekly	Network Assessment-Network Management Plan	✓
Monthly	Network Assessment-Full Detail Change Report	✓
Monthly	Network Assessment-Quarterly Business Review	✓

Generating a Sample Master Services Agreement for a Service Plan

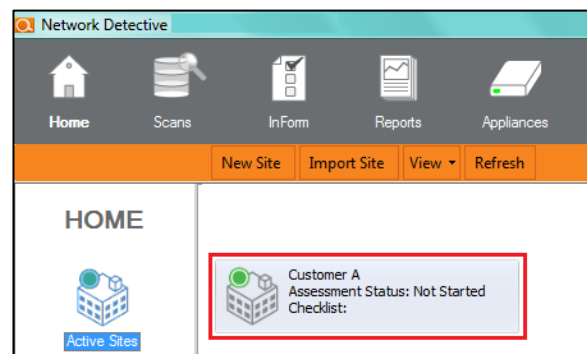
After you have created a **Service Plan**, you can use Network Detective to generate a sample **Master Services Agreement (MSA)** document in Microsoft Word format.

The sample **MSA** document will include an example of terms and conditions for an **MSA** and reference an Exhibit that will present a list of the **Security Policies and Procedures** that reflect the **Service Plan** that will be selected when setting up the Detector for your customer.

To generate the **Sample MSA** document, follow these steps:

Step 1 – Opening Existing Network Detective Site that is Associated with your Detector

1. Start the Network Detective application.
2. Select the **Site** that that is **Associated** with your **Detector Appliance**.
3. To open the **Site**, double-click on the **Site** name.



Step 2 – Access the Detector Settings

After opening the **Site** associated with your Detector Appliance, select the **Detector Settings** icon located on the left side of the Network Detective window to view the **Detector's Settings**.

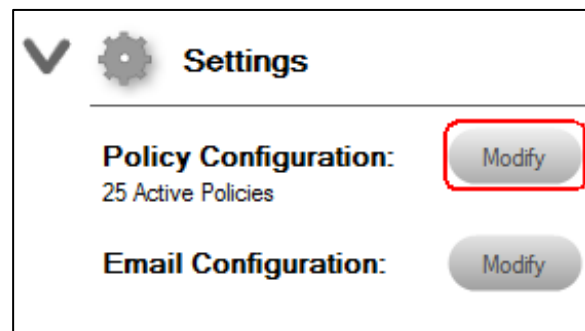


Step 3 – Select the Policy Configuration Option

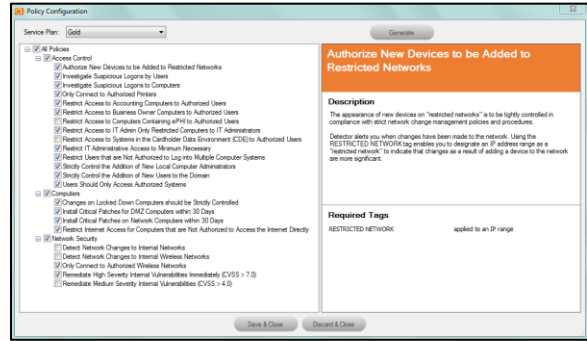
The **Policy Configuration** option enables you to configure Detector to detect violations of **Access Control**, **Computer**, and **Network Security** policies that take place within the network.

Within the **Policy Configuration** window, you have the option to generate the **Sample Master Service Agreement** that is associated with the selected **Service Plan's Security Policies** that you have defined for your Detector.

In the **Detector Settings** window, select the **Policy Configuration Modify** button to access the **Policy Configuration** options window.



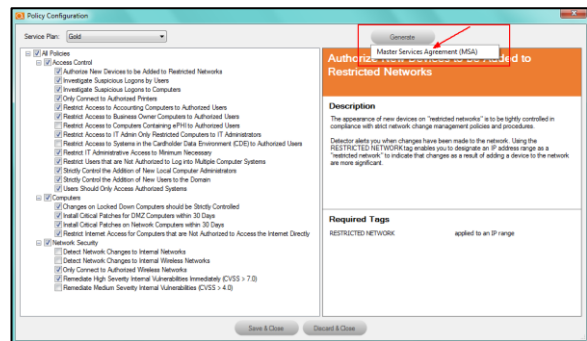
The **Policy Configuration** window will be displayed.



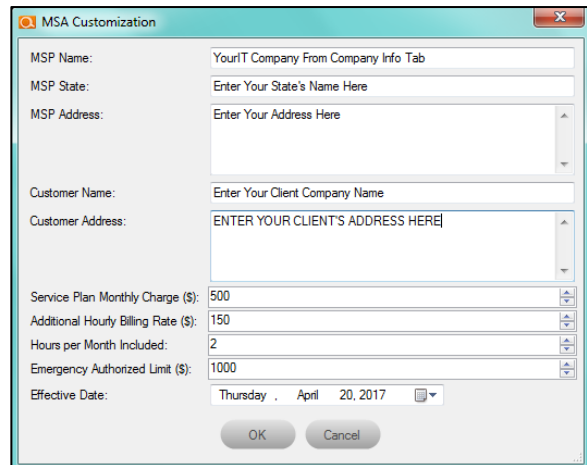
Step 4 – Generate Master Service Agreement Option

Select the **Generate** button in the **Policy Configuration** window.

Next, select the **Master Service Agreement** Option.



The **MSA Customization** window will be displayed



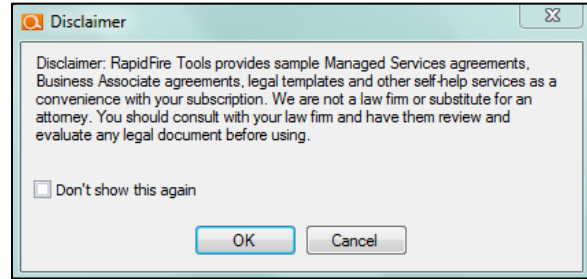
Step 5 – Enter the MSP information, Customer information, and Service Plan Cost Details

In the **MSA Configuration** window, enter the **MSP Name, State, and Address** along with the **Customer Name and Address**.

Next, enter the **Service Plan Monthly Charge, Additional Hourly Billing Rate, Hours per Month Included, Emergency Authorized Limit**, and the **Effective Date** to be referenced in the sample **MSA**.

After entering the **MSA Configuration** information, select the **OK** button.

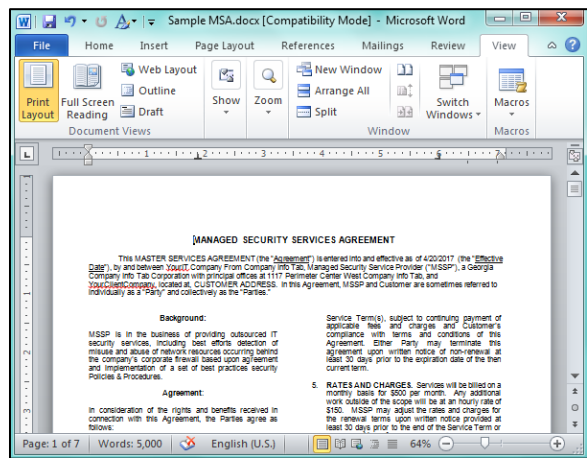
The **Disclaimer** notification and confirmation window will be displayed.



Step 6 – Confirm Acceptance of the Disclaimer and Generate the Sample MSA

Select the OK button in the **Disclaimer** window to generate the **Sample MSA** in Word format.

Network Detective will generate the **Master Services Agreement** document and open Microsoft Word so that you may edit and print the document.




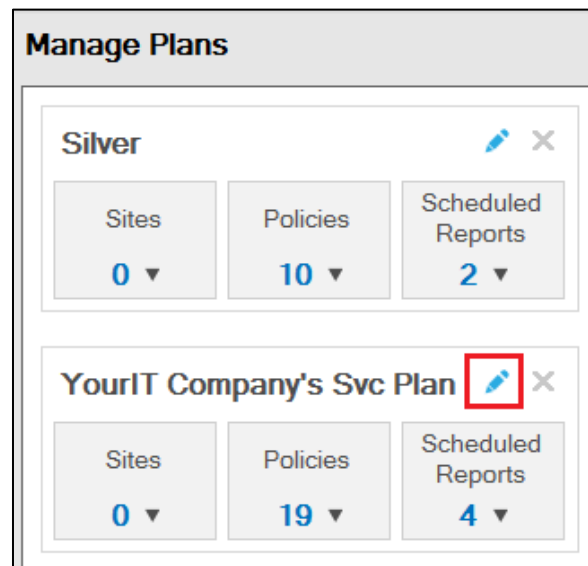
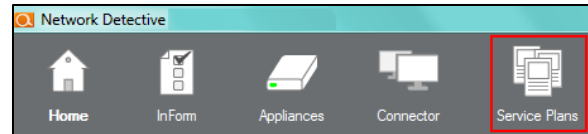
Managing Service Plans

The instructions below detail the processes used to **Modify** and **Delete** Service Plans.

Modifying a Plan

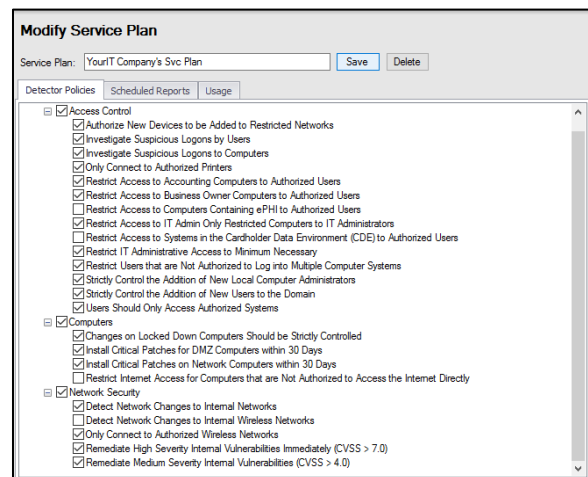
To edit a **Service Plan**, follow these steps:

1. Select the **Service Plans** icon.
2. Select the **Edit**  icon on the **Service Plan** that you would like to edit.



The **Modify Service Plan** window will be displayed.

3. Change the **Detector Security Policies**, the plan's **Scheduled Reports** settings, or the **Name** of the plan, and select the **Save** button.




Impact of Service Plan Changes upon Deployed Detector Service Policy Settings - IMPORTANT

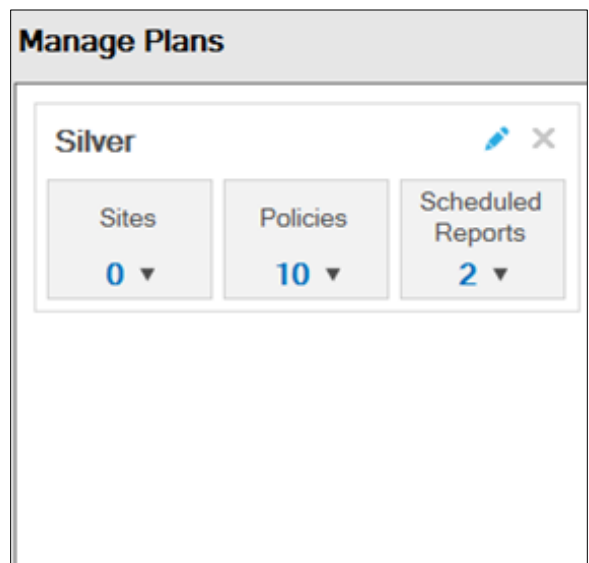
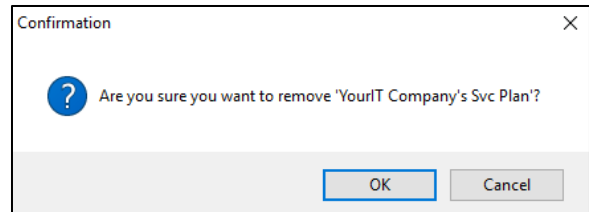
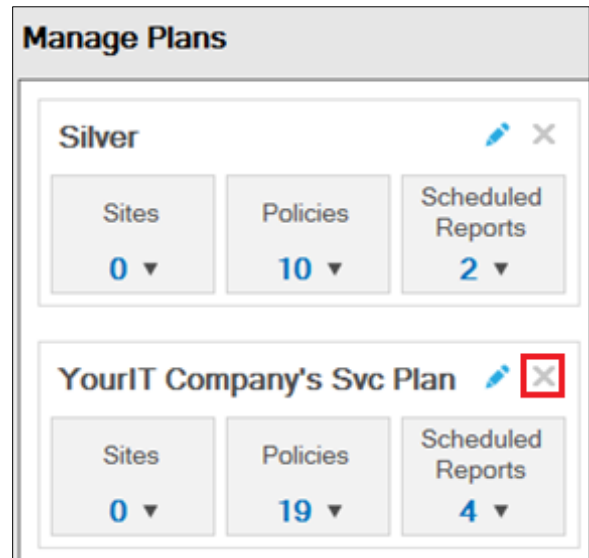
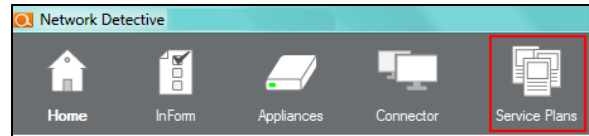
In cases where a **Service Plan** has been previously assigned to one or more Detector Appliances that are deployed, and the **Service Plan** has been updated, this revised **Service Plan** and its new **Detector Policy Settings** must be manually applied to each Detector that will continue to use the plan.

For more information about how to apply the **Security Policies** contained within a **Service Plan** to a Detector Appliance, please refer to the **Detector Quick Start Guide** available at www.rapidfiretools.com/nd.

Deleting a Plan

To **Delete** a **Service Plan**, follow these steps:

1. Select the **Service Plans** icon.
2. Select the **Edit**  icon on the **Service Plan** that you would like to **Delete**.
3. Confirm the deletion of the **Service Plan** you selected.
4. The selected **Service Plan** is deleted and is removed from the **Manage Plans** window.



Impact of Deleting a Service Plan Previously Used to Configure Security Policy Settings - IMPORTANT

In cases where a **Service Plan** has been previously assigned to one or more Detector Appliances that are deployed, and the **Service Plan** has been deleted, a new **Service Plan** and its new **Detector Policy Settings** will need to be associated with these Detectors.

For more information about how to apply the **Security Policies** contained within a **Service Plan** to a Detector Appliance, please refer to the **Detector Quick Start Guide** available at www.rapidfiretools.com/nd.

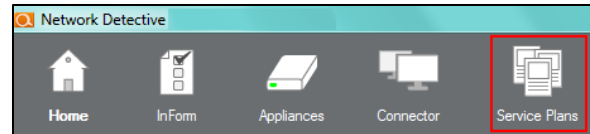
Managing Service Catalogs

The instructions below detail the processes used to **Modify** and **Remove** (i.e. delete) **Service Catalogs**.

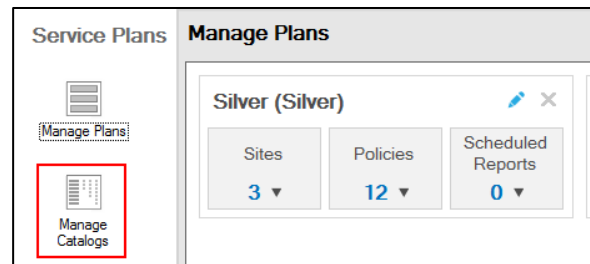
Modifying a Catalog

To edit a **Service Catalog**, follow these steps:

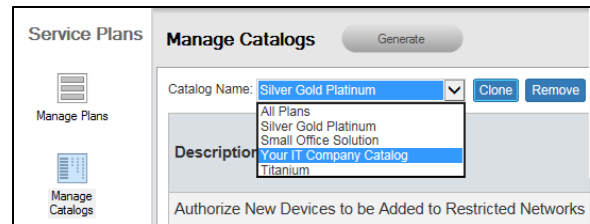
1. Select the **Service Plans** icon.



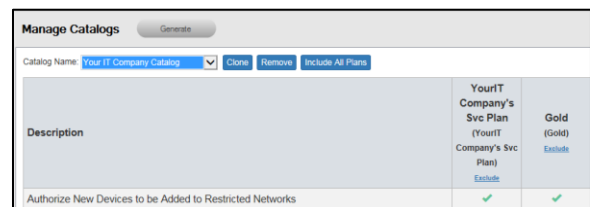
2. Select the **Manage Catalogs** icon.



3. Select **Service Catalog Name** for the **Catalog** that you would like to edit.



The selected **Service Catalog** will be displayed in the **Manage Catalogs** window.



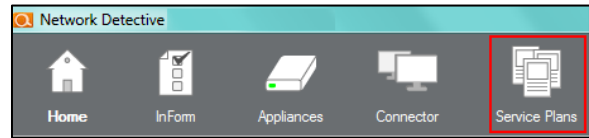
At this point in the process, you may:

- Add **Service Plans** to a **Catalog**
- **Exclude Service Plans** from a **Catalog**
- **Remove** the selected **Catalog** entirely from the **Service Plan Creator**

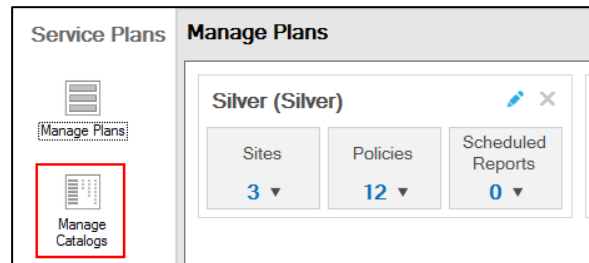
Deleting (excluding) Service Plans from a Catalog

To delete a **Service Plan** from a **Service Catalog**, follow these steps:

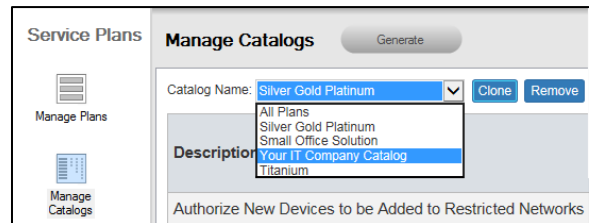
1. Select the **Service Plans** icon.



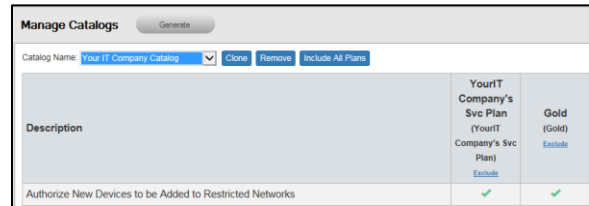
2. Select the **Manage Catalogs** icon.



3. Select **Service Catalog Name** for the **Catalog** that you would like to edit.

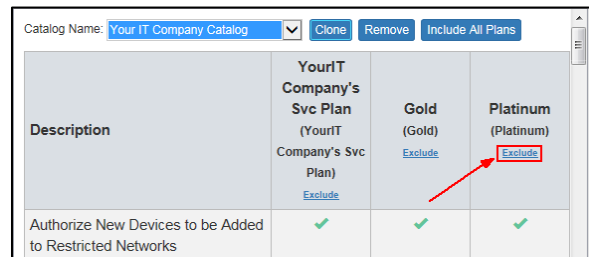


The selected **Service Catalog** will be displayed in the **Manage Catalogs** window. This **Catalog** will include the **Service Plans** previously added to the **Catalog**.



4. Just below the name of each **Service Plan** is a link labeled **Exclude**. The selection of the **Exclude Link** removes the **Service Plan** from the **Catalog**.

Select the **Exclude Link** to remove the specific **Service Plan** selected from the **Service Catalog**.

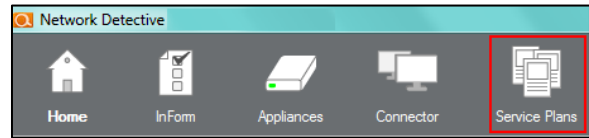


The **Excluded Service Plan** will no longer be listed within the **Service Catalog** user interface unless re-added in the future.

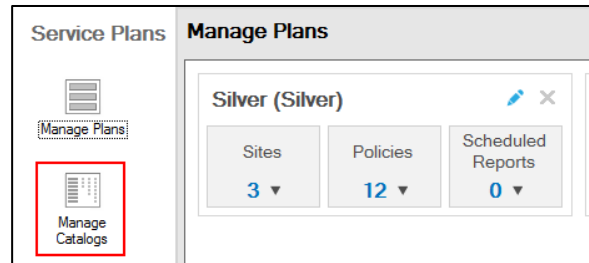
Adding Service Plans to a Catalog

To **Add** a **Service Plan** to a **Service Catalog**, follow these steps:

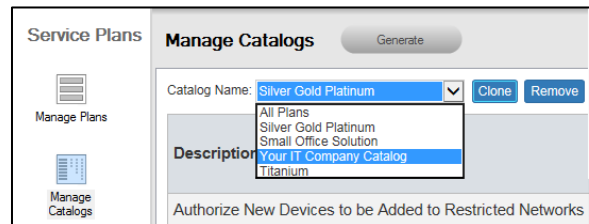
1. Select the **Service Plans** icon.



2. Select the **Manage Catalogs** icon.



3. Select **Service Catalog Name** for the **Catalog** that you would like to edit.

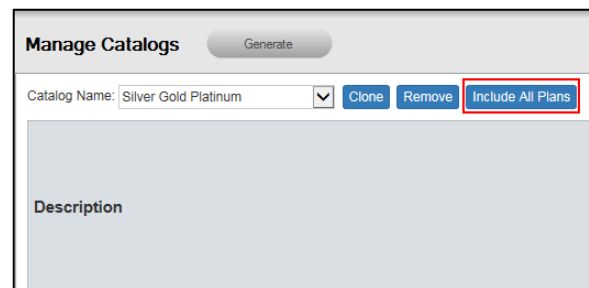


The selected **Service Catalog** will be displayed in the **Manage Catalogs** window. This **Catalog** will include the **Service Plans** previously added to the **Catalog**.



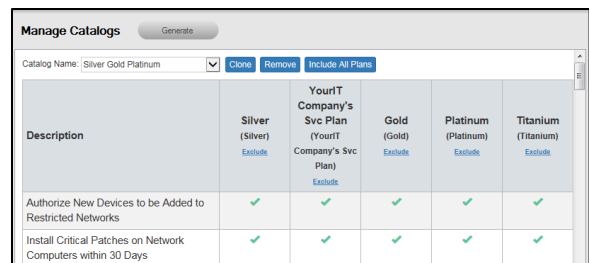
Select the **Include All Plans** button.

This action will add all of the other **Service Plans** that are currently not listed within the **Catalog's Service Plan** list.



4. Just below the name of each **Service Plan** is a link labeled **Exclude**. The selection of the **Exclude Link** removes the **Service Plan** from the **Catalog**.

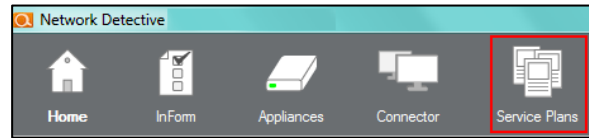
After you have **Excluded** the **Services Plans** that are not required, exit the **Service Plan Creator**.



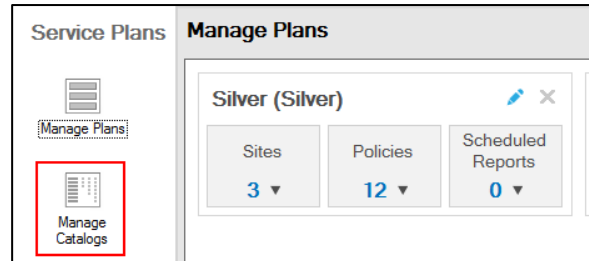
Removing (deleting) a Service Catalog from the List of Catalogs

To **Remove** (delete) an entire **Service Catalog**, follow these steps:

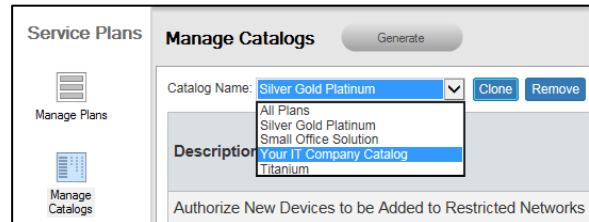
1. Select the **Service Plans** icon.



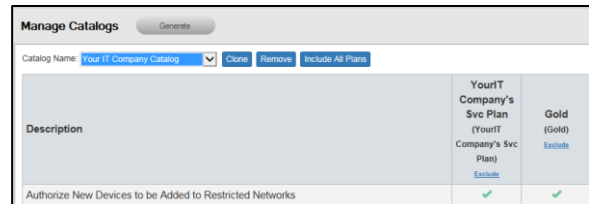
2. Select the **Manage Catalogs** icon.



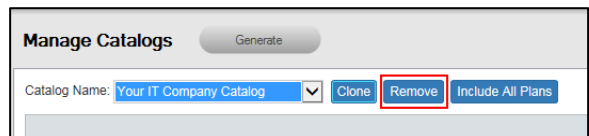
3. Select **Service Catalog Name** for the **Catalog** that you would like to **Remove**.



The selected **Service Catalog** will be displayed in the **Manage Catalogs** window.



4. Select **Remove** button to delete the **Catalog** from the **Service Plan Creator**.



5. The **Catalog** that you **Removed** will no longer be present in the **Catalog Name** list.

