

Quick Reference Guide

Onboarding New Clients—For Service Providers

This guide provides an overview of the tasks that you need to complete when you onboard a new client. It explains how to establish a unique identifier for each new client and apply it consistently across configurations, which is essential to successfully search and manage your client's data.

Before you Begin

Assign a unique identifier to each client. You will use this identifier for:

- The Robot Manager alias
- The Vantage DX Diagnostics Site Group name
- The Microsoft Teams CQD integration name
- The Vantage DX Diagnostics integration name
- The Microsoft 365 integration name



In this document, the unique identifier is referred to as <clientname>.

For more information about how to establish a naming convention, see [Naming Conventions](#).

Onboarding Process

Step	Module	Description	More Information . . .
1	Vantage DX Monitoring	Deploy one or more Robot Managers. In the Vantage DX Monitoring interface, enter the following information in the Alias field: <clientname> - <city> - <machinename>	Edit Monitoring Credentials

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Step	Module	Description	More Information ...
2	Vantage DX Diagnostics	<p>Configure a site group for the new customer and enter the <clientname> in the Name field.</p> <div style="border: 1px solid black; padding: 10px; margin-top: 10px;">  <p>Note: You must configure a site group in Vantage DX Diagnostics for each customer.</p> </div>	<p>Configure a Site Group</p>
3	VDX Analytics	<p>Add the following integrations and specify the <clientname> as the integration name:</p> <ul style="list-style-type: none"> • Microsoft Teams CQD • Vantage DX Diagnostics • Microsoft 365 <div style="border: 1px solid black; padding: 10px; margin-top: 10px;">  <p>Note: You must add an integration for each customer.</p> </div>	<p>Add an Integration</p>
4	VDX Analytics	<p>Create any boards or business services required for the client.</p>	<p>Create a Board and Create a Business Service</p>
5	Martello Delivery Engineer	<p>Request a new client from Martello. Martello will create a new claim and group in Identity Access Management (IAM).</p>	<p>—</p>

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Step	Module	Description	More Information ...
6	VDX Analytics	Create a role for the client and enter the <clientname> in the Claim Value field.	Create a Role
7	VDX Analytics	Configure the client's access to boards, business services, and dashboards.	Add Boards or Business Services to a Role and Add Dashboards to a Role

Searching for Client Data

You will use the unique identifier that you assigned to a client when you search for data in VDX Analytics. For this reason, it is important that you use the identifier consistently.

You can use the search function to find components, alerts, and incidents related to boards and business services. This section provides some examples of searches that Martello has deployed with several partners for their clients. For more information about searches and search operators, see [Perform a Search](#).

Description	Search String
Microsoft 365 Service Health	
Service Health for all workloads	source.Office365.Service:* AND sourceName:CLIENTNAME
Service Health for a specific workload	source.Office365.Service:Exchange AND sourceName:CLIENTNAME
Vantage DX Monitoring	
All Robot results	source.Gizmo.appAlias:* AND CLIENTNAME
Robot health	source.Gizmo.alias:CLIENTNAME

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Description	Search String
Robot Results for one workload (Exchange)	source.Gizmo.appAlias:Exchange AND NOT (source.Gizmo.appAlias:Network) AND CLIENTNAME
Vantage DX Diagnostics	
All Probes results	source.NPV.service:* AND sourceName:CLIENTNAME
Probes result for Teams only (if other endpoints are monitored)	source.NPV.type:MicrosoftTeamsInstance AND sourceName:CLIENTNAME
Probe health	source.NPV.nodeType:Probe AND sourceName:CLIENTNAME
Microsoft Teams CQD	
Dynamic Offices	source.Office365CQD.groupType:OfficeGroup AND source.Office365CQD.NumberOfDevices:>3 AND sourceName:CLIENTNAME
Large meetings	source.Office365CQD.groupType:Meeting AND source.Office365CQD.Number\ Of\ Attendees:>=10 AND sourceName:CLIENTNAME
By country	source.Office365CQD.groupType:Country AND sourceName:CLIENTNAME
Poor WiFi strength	source.Office365CQD.groupType:PoorWifiStrength AND sourceName:CLIENTNAME
Non-certified devices	source.Office365CQD.AudioDevices:(* AND NOT "Logitech" AND NOT "Yealink" AND NOT "Jabra" AND NOT "Senheiser" AND NOT "Microsoft" AND NOT "Poly" AND NOT "Bose" AND NOT "EPOS" AND NOT "RealWear" AND NOT "BlueParrot" AND NOT "Realtek (R) Audio" AND NOT "Built-In input" AND NOT "Default input device") AND sourceName:CLIENTNAME
Main ISPs (>1000 calls)	source.Office365CQD.groupType:ISP AND source.Office365CQD.NumberOfCalls:>1000 AND sourceName:CLIENTNAME