

Computer Operations Policy

Prepared by: Max.chan@mediaworld.com.hk

Approved by:

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1. Purpose

This policy defines standard practices for the day-to-day operation of IT systems at Tree (tree.com.hk) to ensure reliability, security, and continuity of business services.

2. Scope

This policy applies to the following systems at Tree (tree.com.hk):

System	Purpose
File Server	Shared file storage and user data
QuickBooks	Accounting, invoicing, and financial reporting
POS System	In-store sales (Visa card payments via payment gateway — not stored locally)
Online Sales System	Online orders and e-commerce (Visa card payments via payment gateway — not stored locally)
Office Users + PCs	Daily office work; local user accounts (no admin rights)

Also covers network devices, backups, and related infrastructure that support these systems.

3. Policy

3.1 System Monitoring

- Critical systems (**file server**, **POS**, **online sales system**) must be monitored for availability.
- **QuickBooks** is an end-user application and is **not** monitored by IT for availability. End users report any failure or issue to **Admin** (Level 1); escalate to outsourced IT if needed.
- Alerts for failures or unusual activity on monitored systems must be reviewed and acted on promptly.
- System logs should be retained for troubleshooting and security review.

3.2 Scheduled Maintenance

- Routine maintenance (updates, patches, backups) should follow a defined schedule.
- **POS** and **online sales** maintenance should be planned to minimize impact on business hours.
- Office users (tree.com.hk) should be notified in advance when maintenance may affect the **file server** or office PCs.

3.3 Job Processing and Batch Operations

- Daily job processing (e.g., **QuickBooks** reports, **POS** end-of-day, **online sales** order handling) is part of the **end-user daily workflow** and is **not** formally documented as IT batch jobs.
- Each **system or software update** must be recorded by **IT or Admin staff** (what was updated, when, and by whom).
- If a daily workflow fails, end users report the issue to **Admin** first (Level 1). If Admin cannot resolve it, the issue is escalated to **outsourced IT** (Level 2).

3.4 Incident Handling

- System outages or errors should be reported to **Admin** first (Level 1 support).
- If the issue cannot be resolved at Level 1, **Admin** escalates to **outsourced IT** (Level 2 support).
- Incidents must be recorded by **IT or Admin staff**, with service restored as quickly as possible and root cause documented where practical.
- Repeat incidents should be reviewed to prevent recurrence.

3.5 Capacity and Performance

- System capacity (storage, memory, network) should be reviewed periodically.
- Resources should be upgraded before they cause service disruption.

3.6 Separation of Environments

- Production, test, and development environments should be kept separate.
- Testing must not be performed on live production data without approval and proper safeguards.

4. End User Guidelines (tree.com.hk)

- Use only approved **office PCs** with your assigned **local user account** (standard user — no admin rights).
- Save files to the **file server personal folder** — not only on local PC storage.
- Report problems with **QuickBooks**, **POS**, **online sales**, or network access to **Admin** first. Escalate to outsourced IT if Admin cannot resolve.
- **End users cannot install software** or change system settings. All software requests must go through **Admin** or **IT**.

5. Responsibilities

- **Admin (Level 1):** First-line support for end users; record updates and incidents where handled at Level 1; escalate unresolved issues to IT.
- **Outsourced IT (Level 2):** Technical support, system maintenance, monitoring, and resolution of escalated issues.
- **System Owners:** Define business requirements and priority for critical services.
- **End Users (tree.com.hk):** Follow guidance and report issues to Admin promptly.

6. Review

This policy will be reviewed at least once per year.