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Phone and Tablet Setup Checklist

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Setup for Technicians

Date:			
User's Name:		Ticket Number:	
User's Username:		IMEI:	
User's Password:		Serial Number:	
Job Title:		Old Serial (If applicable)	

	Task
<input type="checkbox"/>	Set pin as 1234 (User can change it when they receive the device)
<input type="checkbox"/>	Install CAT Apps
<input type="checkbox"/>	Install Microsoft Teams app
<input type="checkbox"/>	Install Microsoft Word, PowerPoint, Excel (This is so the user can open attachments from emails)
<input type="checkbox"/>	<p>Home screen apps:</p> <ol style="list-style-type: none"> 1. Authenticator 2. InService 3. InForms 4. CAT Apps x6 5. Outlook 6. Vault Check 7. Vault Notify 8. Teams 9. Chrome 10. Settings 11. Contacts (Orange) 12. Play Store 13. Camera 14. Gallery 15. Phone 16. Messages



<input type="checkbox"/>	<p>Set up Microsoft Authenticator by going to https://aka.ms/mfasetup <i>(This needs to be done first to be able to set up InService, InForms and Outlook)</i> <i>New employees: can login to their account in an incognito browser when their account has been set up</i> <i>Current employees: You will need to use the Temporary Access Pass as the password</i></p>
<input type="checkbox"/>	<p>Set Chrome as default browser (This is especially for the apps InService and InForms) <i>Settings > Apps > Chrome > Browser app > Select Chrome</i></p>
<input type="checkbox"/>	<p>Log in to InService (using the login with Office 365 button) – Only if you know their password</p>
<input type="checkbox"/>	<p>Log in to InForms (Using the login with oauth2 button) – Only if you know their password</p>
<input type="checkbox"/>	<p>Setup emails in Outlook (If you know their password)</p>
<input type="checkbox"/>	<p>Turn on “Sync Contacts” in Outlook</p>
<input type="checkbox"/>	<p>Turn on “Sync Calendar” in Outlook</p>
<input type="checkbox"/>	<p>Check for phone update and action</p>
<input type="checkbox"/>	<p>Check for app updates in play store and action</p>
<input type="checkbox"/>	<p>Set screen timeout to 5 mins</p>
<input type="checkbox"/>	<p>Change side key setting back to “Power Off” (Android seems to default it to Bixby) <i>Settings > Advanced Features > Side Key > Select Power Off Menu</i></p>

Setup for General Employees

Date:			
User's Name:		Ticket Number:	
User's Username:		IMEI:	
User's Password:		Serial Number:	
Job Title:		Old Serial (If applicable)	

	Task
<input type="checkbox"/>	Set pin as 1234 (User can change it when they receive the device)
<input type="checkbox"/>	Install Microsoft Teams app
<input type="checkbox"/>	Install Microsoft Word, PowerPoint, Excel (This is so the user can open attachments from emails)
<input type="checkbox"/>	<p>Home screen apps:</p> <ol style="list-style-type: none"> 1. Authenticator 2. Outlook 3. Teams 4. Chrome 5. Settings 6. Contacts (Orange) 7. Play Store 8. Camera 9. Gallery 10. Phone 11. Messages



<input type="checkbox"/>	<p>Set up Microsoft Authenticator by going to https://aka.ms/mfasetup <i>(This needs to be done first to be able to set up InService, InForms and Outlook)</i> <i>New employees: can login to their account in an incognito browser when their account has been set up</i> <i>Current employees: You will need to use the Temporary Access Pass as the password</i></p>
<input type="checkbox"/>	<p>Set Chrome as default browser <i>Settings > Apps > Chrome > Browser app > Select chrome</i></p>
<input type="checkbox"/>	<p>Setup emails in Outlook (If you know their password)</p>
<input type="checkbox"/>	<p>Turn on "Sync Contacts" in Outlook</p>
<input type="checkbox"/>	<p>Turn on "Sync Calendar" in Outlook</p>
<input type="checkbox"/>	<p>Check for phone update and action</p>
<input type="checkbox"/>	<p>Check for app updates in Play Store and action</p>
<input type="checkbox"/>	<p>Set screen timeout to 1 mins</p>
<input type="checkbox"/>	<p>Change side key setting back to "Power Off" (Android seems to default it to Bixby) <i>Settings > Advanced Features > Side Key > Select Power Off Menu</i></p>