

9 November 2021

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**Phone and Tablet Setup Checklist**

|  |  |
| --- | --- |
| **Date:** |  |
| **User’s Name:** |  | **Ticket Number:** |  |
| **User’s Username:** |  | **IMEI:** |  |
| **User’s Password:** |  | **Serial Number:** |  |
| **Job Title:** |  | **Old Serial (If applicable)** |  |

# Setup for Technicians

|  |  |
| --- | --- |
|  | Task |
|  | Set pin as 1234 (User can change it when they receive the device) |
|  | Install CAT Apps |
|  | Install Microsoft Teams app |
|  | Install Microsoft Word, PowerPoint, Excel (This is so the user can open attachments from emails) |
|  | Graphical user interface  Description automatically generatedHome screen apps:   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 |
|  | Set up Microsoft Authenticator by going to <https://aka.ms/mfasetup>  (This needs to be done first to be able to set up InService, InForms and Outlook)  *New employees: can login to their account in an incognito browser when their account has been set up*  *Current employees: You will need to use the Temporary Access Pass as the password* |
|  | Set Chrome as default browser (This is especially for the apps InService and InForms)  *Settings > Apps > Chrome > Browser app > Select Chrome* |
|  | Log in to InService (using the login with Office 365 button) – Only if you know their password |
|  | Log in to InForms (Using the login with oauth2 button) – Only if you know their password |
|  | Setup emails in Outlook (If you know their password) |
|  | Turn on “Sync Contacts” in Outlook |
|  | Turn on “Sync Calendar” in Outlook |
|  | Check for phone update and action |
|  | Check for app updates in play store and action |
|  | Set screen timeout to 5 mins |
|  | Change side key setting back to “Power Off” (Android seems to default it to Bixby)  *Settings > Advanced Features > Side Key > Select Power Off Menu* |

# 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 |
|  | Set pin as 1234 (User can change it when they receive the device) |
|  | Install Microsoft Teams app |
|  | Install Microsoft Word, PowerPoint, Excel (This is so the user can open attachments from emails) |
|  | Graphical user interface, application, website  Description automatically generatedHome screen apps:   1. Authenticator 2. Outlook 3. Teams 4. Chrome 5. Settings 6. Contacts (Orange) 7. Play Store 8. Camera 9. Gallery 10. Phone 11. Messages |
|  | Set up Microsoft Authenticator by going to <https://aka.ms/mfasetup>  (This needs to be done first to be able to set up InService, InForms and Outlook)  *New employees: can login to their account in an incognito browser when their account has been set up*  *Current employees: You will need to use the Temporary Access Pass as the password* |
|  | Set Chrome as default browser  *Settings > Apps > Chrome > Browser app > Select chrome* |
|  | Setup emails in Outlook (If you know their password) |
|  | Turn on “Sync Contacts” in Outlook |
|  | Turn on “Sync Calendar” in Outlook |
|  | Check for phone update and action |
|  | Check for app updates in Play Store and action |
|  | Set screen timeout to 1 mins |
|  | Change side key setting back to “Power Off” (Android seems to default it to Bixby)  *Settings > Advanced Features > Side Key > Select Power Off Menu* |