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# User Onboarding Procedure Guide for New Employees

Purpose:  
This guide outlines the process for onboarding a new employee, setting up their BanQsi IT peripherals, and ensuring that their device is properly configured and enrolled in the BanQsi systems.

## Step 1: Initial Preparation (IT Support)

### Ensure Sufficient M365 Premium Licences :

* + Verify that there are enough M365 Premium licenses available to allocate to the new employee.
  + If needed, purchase additional licenses through the Microsoft 365 Admin Center or through the designated purchasing process.

### Create an Email Account:

* + Create a new user account in the BanQsi domain.
    - Access the **BanQsi Admin Portal** ( <https://portal.office.com> ).
    - Set up the new employee’s **email account** (e.g., [firstname.lastname@banqsi.com](mailto:firstname.lastname@banqsi.com)).
    - Ensure that the email is associated with the appropriate groups and permissions for access to shared resources and internal communications.
  + Set the default language (English) and region in Microsoft 365 for the new user based on their location.
  + Enable MFA (Multi-Factor Authentication) for security.
  + Assign the appropriate M365 license (e.g., Microsoft 365 Premium).

### Provision and Prepare the Device:

* + Prepare a Surface Laptop for the new employee, ensuring that it is configured for M365 auto-enrollment and Intune management.
  + Make sure that Windows Autopilot is set up for automatic device provisioning.
  + Verify that the **Windows Autopilot Profile** is created in the **Intune Admin Console** for the new user’s device.

### Ensure Intune Auto Enrollment Setup:

* + Verify that **Azure AD Join** and **Intune auto-enrollment** policies are properly configured in the **Microsoft Endpoint Manager** console.
  + Ensure the new device is registered to automatically join the organization’s M365 tenant upon first login.

### Ship the Device:

* + Arrange to ship the pre-configured Surface Laptop to the new employee’s address.
  + Include clear instructions in the package on how to set up and power on the device.

## Step 2: User Receives the Device

### Device Unboxing and Initial Setup:

* + Upon receiving the Surface Laptop, the new employee should follow the initial setup prompts.
  + The user is required to acknowledge receipt of the Surface Laptop and confirm with the IT support.
  + IT support will send the user’s temporary login credentials through a text message to their mobile phone
  + Connect the device to the internet (Wi-Fi or Ethernet).
  + At the login screen, the employee should enter their **BanQsi domain email address** and **password**.

### Device Auto Enrollment:

* + Upon successful login, the **Windows Auto Enrollment** process will automatically trigger.
    - The device will connect to the **Intune** server, and the employee will be prompted to provide additional authentication details (e.g., MFA).
    - The device will be registered and joined to the **organization’s Azure Active Directory**.

### Profile and Settings Sync:

* + The employee’s device will sync settings such as **desktop configuration**, **OneDrive**, **Outlook**, and other applications set up in the organization’s environment.
  + The device will automatically download required software applications, including any company-specific apps, and deploy security policies such as encryption, antivirus, and device management settings.

### End-User Training (Optional):

* + Provide the new employee with basic training on how to use the Surface Laptop, access Microsoft 365 applications, and access internal resources (email, SharePoint, Teams, etc.).

## Step 3: IT Support Post-Deployment

### Verify Device Enrollment:

* + Once the employee has logged in, verify the device is enrolled in **Intune**.
    - Go to the **Microsoft Endpoint Manager Admin Center**.
    - Check the **Device Compliance** and **Device Inventory** to confirm the device has successfully enrolled and complies with organizational security policies.

### License Confirmation:

* + Ensure that the new employee has the correct Microsoft 365 license assigned.
  + Verify that the license is active and fully assigned in the **Microsoft 365 Admin Center**.

### Confirm Device Compliance:

* + Ensure that the device complies with organization security policies (e.g., BitLocker encryption, antivirus software, etc.) in **Intune**.

### Finalize the User Setup:

* + Confirm that the new employee has access to required shared resources (files, networks, applications).
  + Test email functionality, Microsoft Teams, and any other communication tools to ensure they are working correctly.
  + Confirm that the new employee is able to access their **OneDrive** and **SharePoint** environments.

## Step 4: Ongoing Support (IT Support)

### Monitor Device Health:

* + Regularly monitor device health and compliance through the **Microsoft Endpoint Manager** console.
  + Address any non-compliance issues (e.g., outdated software, missing policies).

### Provide Ongoing Assistance:

* + If the new employee encounters issues with their device, provide technical support through the IT helpdesk.
  + Troubleshoot any software or device-related issues, escalating as necessary.

### Training and Resources:

* + Provide training resources on security best practices, software usage, and collaboration tools (e.g., Microsoft Teams, Outlook).
  + Share internal documentation on how to access IT support, manage personal devices, and request additional resources.

## Step 5: User Confirmation and Feedback

### Confirm Setup Completion:

* + Ensure the new employee confirms that the device setup is complete and that they have all the access they need.
  + Have the employee acknowledge receipt of the device and successful setup.

### Request Feedback:

* + After a few days, ask for feedback on the onboarding experience to identify any potential improvements.

## Notes for IT Support:

* Always have a contingency plan in case of issues with Intune enrollment or device provisioning.
* Keep communication open with the new employee to ensure they feel supported during the onboarding process.