Device Setup and Configuration SOP

Purpose

To establish a standardized and secure procedure for setting up and configuring new laptops and desktops. This SOP ensures consistency, compliance with IT policies, and user readiness across all departments. Applies to all IT personnel responsible for configuring Windows and macOS laptops and desktops for employees, contractors, and interns.

1. Verify purchase order and match device serial number to inventory list. Assign asset tag and record the asset in InvGate.
2. Operating System Imaging
3. Windows:

* Boot to recovery or setup and install latest Windows OS.
* Install InvGate Agent and enroll device.
* Apply latest OS updates and security patches.

1. macOS:

* Boot into macOS Setup Assistant.
* Install InvGate Agent and enroll device.
* Update to the latest macOS version and security patches.

1. Create a local admin account for IT use and a standard user profile for the assigned employee.
2. Set initial password and require reset on first login.
3. Configure user settings.
4. Install and configure the following based on employee role and department:

* Microsoft 365
* Web browsers
* Security software
* Adobe Reader, Zoom, PDF tools, or others as specified by the role
* Department-specific software

1. Connect to networked or local printers. Install drivers and test print.
2. Configure additional peripherals as needed, such as webcam, headset, scanner, etc.
3. Connect to organization Wi-Fi.
4. Ensure device firewall and endpoint protection are active.
5. Verify VPN client installation and connection (if remote access to resources is required).
6. Configure BitLocker/FileVault encryption and verify recovery keys are backed up.
7. Log in as user and validate access to Microsoft 365 apps, printer connectivity, network and internet access, and InvGate enrollment and policy compliance.
8. Document successful setup in the ticketing system and close the setup ticket.
9. Provide user with device, power supply, and other peripherals, deliver a quick orientation, and require signature on Device Receipt Acknowledgement Form.
10. Update inventory records with assigned user name and email, device serial number and asset tag, date of setup and name of technician.

This SOP should be reviewed every six months or following major changes to IT infrastructure, software stack, or onboarding workflows.