Onboarding Process

Checklist New Clients

aim
I.T. Services

Required Docs

Checklist New Clients

PASSWORDS

Required Documents

- Windows AD Admin
- Local Machine Passwords (if no Domain)
- Network Equipment
  - Router
  - Switches / APs
- Application Passwords
  - Databases
  - Backup Software/Appliance
  - Quickbooks Files (or any application with internal auth)
- 3rd Party
  - Hosting Companies
    - Azure / Office 365
    - AWS
    - Google
  - DNS / Domain Name
    - Cloudflare
    - GoDaddy
    - EasyDNSbody

Initial Reviews

Checklist New Clients

Onboarding Process

NETWORK

Initial Reviews

- Check ISP/Internet
- Make sure we have account / PIN for all ISPs
- Document Static IPs
- Primary Information for Network
- Default Gateway
- DNS Servers
- DHCP Range(s)
- VLANs
- Wireless
- SSIDs / Passwords
- Router(s)
- Confirm access and check config
- Document any open ports, check for remote access (RDP, VNC, SSH, etc..). Remove any that are not required.
- Confirm any VPN access and who/what is setup, remove any that should not be there.
  - ▪

ACCOUNT STAFF LIST

Initial Reviews

- Get Current list of staff members
- Add to ATMS (Name, Email, Title, and Phone)
- Send out Welcome Emails / Support Portal Information / AIM Contact Info
- Active Directory
- Compare to Staff List
- Review Accounts that have not logged in for 180 days
- Compare Staff List of Office 365/Google
- Compare to Staff List
- Review Accounts that have not logged in for 180 days
- Disable accounts not need/old
- Review current list of users with client to make sure they should all have access
  - ▪

BACKUPS

Initial Reviews

- Check existing backups, ensure they are good, if not High Priority
- Simple restore test check integrity
- If backups are tied to old IT/Employees they need to be migrated to new system
- Find out if any staff members have backups at home
- MGMT should be made aware and approve of Company data off site
- Make sure they are encrypted

SOFTWARE

Initial Reviews

- Document Primary Applications on workstations
- Document LOB (Line of Business) Applications
  - Quickbooks
  - Shelby
  - Sage
  - etc.

- Support Agreements
  - Confirm any active support agreements for LOB

- Databases
  - Identify any Database in play and used by software
  - MS SQL
  - MySQL
  - Oracle
  - Paradox
  - Validate getting backed up (or the server they are on is backed up)

AIM SUPPORT SOFTWARE

Initial Reviews

- Install Remote Access on Servers
- Push out Check IN Script to all devices
- Review Machines
  - OCS Installed / Working (Inventory)
  - Eset Installed / Working (AV)
  - Zabbix Installed / Working (Monitoring)
  - WinLogBeat Installed / Working (Log Aggregation)
  - ScreenConnect Installed / Working (Remote Access / Support)

REMOTE ACCESS

Initial Reviews

- Check for remote access on machine/workstations (LMI, SC, TeamViewer, etc..)

- Confirm if still needed by users/vendors, if not remove

- Ask/Review any current company policy about remote access, VPN, and work from home.
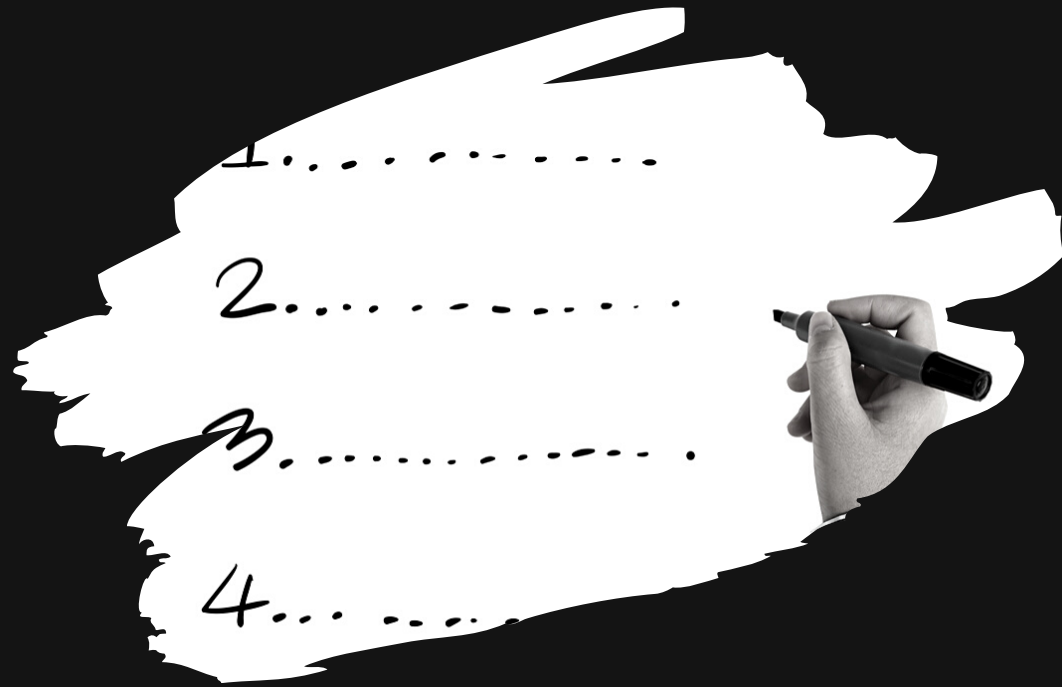
OPEN ISSUES

Initial Reviews

- Interview staff for open issues - **create tickets** for:
  - Issues that were said to be "unfixable" but we can help
  - Recurring tickets/issues previously fixed, but continuing (only fixed the symptom, not the problem)
  - Performance issues (server or workstation)
  - Tasks or Processes that the client thinks could be optimized. We might not be able to help, but good to know about.

- Projects
  - Get a high level view of any planned projects to review
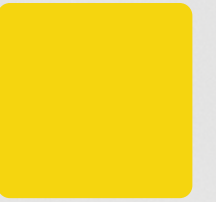
- Any current projects that need to be finished?
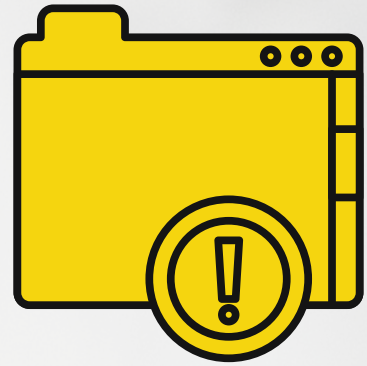
Thank You

Onboarding
Process

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