Incoming User Process

01/05/2024 6:13 pm EST

New Employee Access Request

1. Make sure you get a filled out, New User Form from new users manager
    a. This has information of what department user will be in, software they will need and groups they will have to be associated with.

Create a Sheet in OneNote Notebook

1. In the OneNote notebook, create a new page with the users info. You will be referencing this sheet throughout this process.
    a. Include the user's name in the title (Last, First)
    b. The date that you created the sheet
    c. Extension
    d. Computer name
    e. Computer Service tag number (found on computer)
    f. Computer's MAC address
        i. Found by running CMD > ipconfig /all

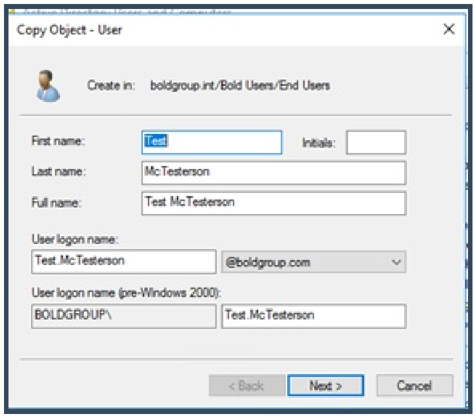
Local Domain: Create a user profile

1. Using the MRemoteConfig, log in to DOM-05, listed under Domain Controllers
2. Open Active Directory Users and Computers
3. Expand int > Bold Users > End Users
4. Find an existing user that will have similar permissions as the new user
    a. The similar user should be specified on the New Employee Access Request sheet

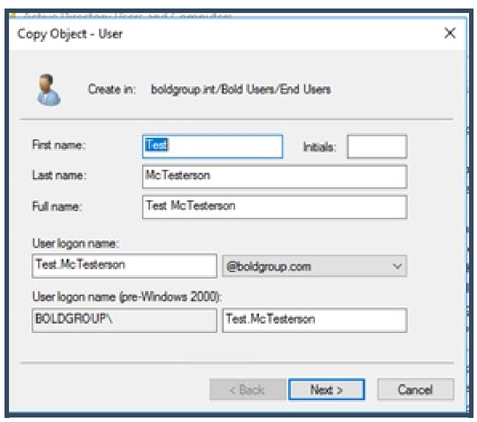
5. Right click existing user > Copy

    a. Enter the name of the new user and their email address

        i. Email address should be [first].[lastname]@boldgroup.com

            i. 

            ii. Create a temporary password for the user. Be sure to mix in upper and lowercase letters, numbers and symbols and make sure to document the temporary password on the users

                i. 

                ii. Make sure "User must change password at next logon" is checked.

        ii. Once user profile is created, right click user and select Properties

            i. Under General, enter the following info in their respective fields

                i. Office – enter users extension number (You may have to enter after setting up phone for the user

                ii. Telephone number - (719) 593-2829

                iii. Email – ensure that their proper email is entered here

    ii. Next, go to Organization

        i. Job Title – enter title listed under New Employee Access Request sheet

        ii. Department – Be sure the new user is listed under proper department

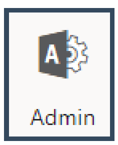
    iii. Click Apply and OK

iii. If Powershell is open, tap the up arrow to bring up the command Start-ADSyncSyncCycle

    i. If Powershell is not open, open it and manually enter command

    ii. This command will Sync our local AD with the cloud AD

Cloud Domain: Add Groups and licenses

1. Login to Portal.office.com
2. Select the Admin panel 

3. On the left-hand side, select Users > Active Users and select the new user
4. In the Product Licenses section, click Edit
    a. Check the New Employee Access Request Sheet to see what licenses the user will need

    ccclxv. You can add Office365, Dynamics 365.
5. Next we can add the user to additional groups.
    a. Before we edit these, we will check an existing user that the new employee will be similar to. Find that user, check their Group memberships and take a screen grab and return to the new user

    b. In the new users account, Edit the Group Memberships similar to the existing, similar user.

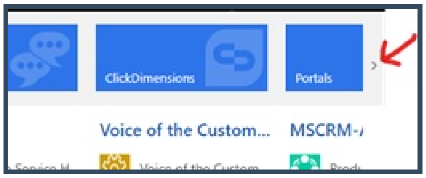
    c. All users should have SignatureCodeTwoConnector group associated with them

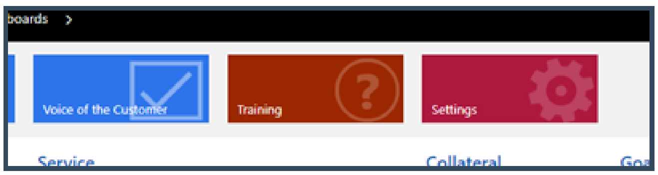
CRM Permissions

1. Log in to portal.office.com

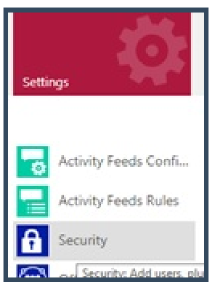
2. Click the Dynamics 365 tile

3. Click the drop down next to Service then click the right arrow to get to Settings

    a. 

    b. 

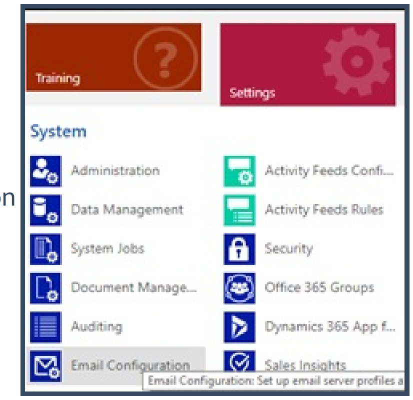
4. On the drop down, select Security then Users

5. 

6. Search for the new user

7. On the right side of the page, under the tile labeled Teams add the proper Teams and permissions that the user will need. You may need to check a similar team member to see what Teams they are assigned. You can find the similar user on the New_Employee_Form Rev03 document.

8. Be sure to save.

9. Go back to the Settings tile and in the drop down, select Email Configuration 

10. Click Mailboxes

11. Search for user

12. In the top ribbon, click Test & Enable Mailbox 

13. Give it a minute to run the tests, then close the users mailbox window.

14. Reopen the user again. If you see "Success" under "Incoming Email Status", "Appointments, Contacts, and Tasks Status", and "Outgoing Email Status" then you may click Approve Email.

15. If you see Failure in any of those fields, Click Test & Enable Mailbox

16. NOTE: You need to add security permissions from Step 4 and on in order for Mailbox to test successfully.

Key Card Setup

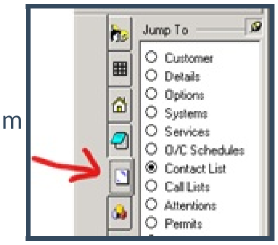
1. First, grab a keyfob. Do not pull one out of the bag that is labeled, "Pre-Programmed Temporary HID Keys". Instead pull out a round one with the purple rubber face and make sure the back has a clear, readable numeric code.

2. To set up a badge for the user, login to the bold-vertx server (172.16.143.47) as mailadmin

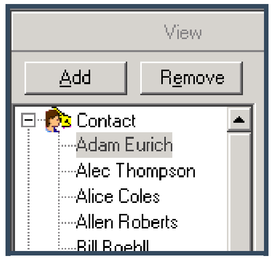
3. If Operator Workstation sis not open, open it and use default credentials to log in

4. On the left-hand pane, select HID-074B – Bold Technologies

5. In the Jump To panel on the right-hand side, select Contact List

6. Next, click the Access Cards button on the right side of the program 

7. Click the Edit button toward the top of the program, then OK

8. On the top of the Contact List, click Add 

9. In the Add Keyholder popup, enter the name of the user, then click

10. After the user is created, highlight the users name, then click Add

11. The Add Access Control Card popup will appear. Under Card Set, select FAC148.

12. For Card Number enter the first set of digits, without the first 0.

    a. If the card reads 01234, then just enter 1234.

13. Click OK

14. Next, under Access Levels, click the 24 Hour Access

15. Next hit save at the top

    a. 

16. Last, check the badge to ensure it works and attach a retractor to the badge.

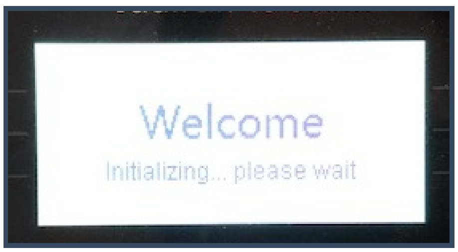
    a. Retractors are located in the same drawer as the key badges, located in a plastic bag.

Aeonix Phone System

1. Each user will need a phone. The current phones we use are either Tadiran or Yealink phones. Phones can be found in the storage closet next to Dan's office. The phones do not include a power brick in the box and have to be

ordered separately. They should be kept in the same general location.

2. First thing to do is unbox the phone and connect all cables necessary.
    a. For the handle, the end with the longer straight side goes in the back of the base, while the shorter side goes into the handle.

3. Plug in the phone to power. Upon powering the phone, there will be a splash screen.
    a. IMPORTANT: Do not unplug the phone while it is initializing! This will brick the phone and make it inoperable.
    b. 

4. After the Initializing screen has gone away, we can press the "OK" button in the middle of the arrows to get the MAC address and IPv4 address. These will be important for later on, so keep these within reach.

5. Open the shared BOLD DID 2019.xls file located in the shared OneDrive folder
    a. Look through the BOLD DID 2019.xls document to find an available phone extension after extension 4709
    b. The lines before are reserved for service numbers, scripts, conference lines, etc…

6. Log in to the Aeonix Administration portal using credentials in LastPass
    a. http://172.16.142.92:8080/aeonix/mainForm.jsf

7. Locate the open extension that you found in the BOLD DID 2019.xls sheet. It should be empty. If it is not empty, the user either was not added to the DID sheet, or that user was never removed from the Aeonix portal.

8. In the row above or below the empty extension, click the icon to clone settings.
    a. NOTE: Make sure what you are highlighting is a user and not a service, conference line,

9. You will be brought to a new page that says, "New User" in the top left of the main panel, and the "Login name" will be [cloned extension] _1

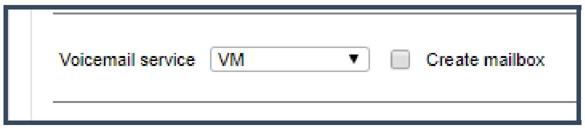
10. For the Login Name field, Enter the user's new extension

11. For the Display Name field, enter the user's First and Last name

12. In identity, Enter their First Name, Last Name and in Description, Enter Both First and Last Name.

13. If this extension has not been used before, there will be an option to Create a Mailbox. Be sure to click Create Mailbox

    a. Note: If a mailbox is already created, we will need to reset the users voicemailbox password.

    b. 

14. If the user is in Support

    a. In the section where it says, "Aeonix Contact Center agent number (for PC-less agent only)"

        i. Enter their extension number

15. Next, on the main tabs, select Phones

    a. 

16. Click where it says, New Phone Configuration. More fields will drop down.

    a. Under Phone Type select SIP Terminal

    b. Enter the MAC Address of the phone

    c. In the Phone ID field, enter the extension that you selected.

    d. Click Save

17. If you have not done so yet, plug in the new users phone into a network switch, and allow it to connect. Do not unplug during this process.

18. Once the phone is connected to the network, enter the IP address of the phone into the address bar of your browser.

19. On the login page, enter these credentials
    a. Username: admin
    b. Password: admin
20. On the top tab, click Features
21. On the left navigation pane, click General Information and change the following settings
    a. "Use Logo"
        i. Turn to "Off"
    b. "BLF LED Mode"
        i. 0
22. Next, on the left navigation pane, click Audio
    a. Headset send Volume
        i. 20
23. On the top Navigation pane, select Settings
24. On the left Navigation pane, select Auto Provision
    a. IF THE USER IS ON-PREM FOLLOW BELOW, IF REMOTE SKIP TO C
    b. Server URL (On-Prem)
        clxxii. https://172.16.142.92:8443/aeonix/Provisioning/
    c. Server URL (Remote)
        clxxiii. https://173.227.172.195:8443/aeonix/Provisioning/
25. Scroll down and click Confirm
26. Next, click, Auto Provision Now
27. The phone will go through a few steps.

28. IF THE USER IS A REMOTE USER
    a. If the user is remote, go back to Aeonix Administration Portal (http://172.16.142.92:8080/aeonix/mainForm.jsf)
    b. Go to Users > Users List
        i. Select the remote user.
        ii. Click Phones, then click the sip phone that is under that users name
        iii. Click the Provisioning tab
        iv. Under “Profile Name”, make sure, “New_Remote” is selected.
29. Test dial the new user’s extension to verify the system is working.

User Computer

1. Locate a computer for the user and hook up the necessary equipment (monitor, keyboard, mouse, and any other peripherals the user may need)
2. If windows 10 Pro or Enterprise is not installed, install via USB installer
    a. You can find a Windows 10 Enterprise USB in the binder of install media
    b. License is located on the back of the DVD Sleeve
3. If installing a fresh version of Windows, create a local admin, named sysadmin
    a. For security questions, use “Colorado” for each question
4. Get the Mac Address and put it in the users OneNote Page
5. Install all available updates
6. Navigate to \\fileserver01\Support and copy over the Cylance zip file (DO NOT RUN FROM FILESERVER01)
    a. Unzip to the desktop
    b. Run the batch file. The batch file will insert the product key.
7. Update the BIOS if one is available

8. Rename the machine and add to the domain. The machine name will be the users department and their extension
    a. Ex: IT-4981
    b. As a similar user for their computer name.
    c. Domain name is boldgroup.com
9. Add Icons to users desktop
    a. Right click desktop
    b. Click Personalize
    c. Go to Themes
    d. To the right, click Desktop Icon Settings
    e. Make sure Icons, Computer, Network, Recycle Bin and Control Panel are clicked.
    f. On the desktop, My PC icon, right click and rename to machine name.
10. Enable Remote Desktop for the user
    a. On desktop or File Explorer, right click users computer and select Properties
    b. To the left of the window that pops up, Select Remote Settings
    c. Enter NA credentials if prompted
    d. Make sure “Allow remote connections to this computer” is checked
    e. Next, click Select Users
    f. Add users name to field.
11. Uninstall the following software
    a. Uninstall any default office apps. You may have to do this in the new Windows 10 “Add or Remove Programs” window
    b. Remove any antivirus that is not Cylance

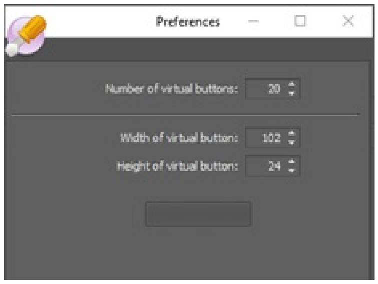
        i. Trend micro may still be on some computers

12. Install the following software
    a. Google Chrome
    b. Install Microsoft Office 365 from Users Portal.office.com page
    c. Microsoft Teams
    d. Notepad++
    e. Dynamics365 (Use the new version installed from CRM)
    f. CutePDF
    g. Sonicwall Client (If Necessary)

13. SeaNavigator
    a. Found in \\fileserver01\Support
    b. When installing SeaNavigator
        i. When asked for primary and secondary IP
            clxxii. 16.142.92
            clxxiii. 16.142.94
        ii. Username 4757
        iii. Password: 1721614292+_)
            i. If that doesn't work, try 1721614285+_)
        iv. Next, click the compass at the top-left corner of the program then click Preferences
            i. Under General
                i. Click, "Use attendant ribbon layout"
            ii. Under Alerts

i. Make sure “Display alert when an incoming call is received” is the only one checked

iii. Under Virtual Buttons

iv. 

c. Lastly, go to C:\Users\<username>\AppData\Roaming\Tadiran\Sea Navigator\

i. Right click and edit _SeaNavigator.xml in notepad++

ii. Look for AeonixMonitor, and change the value from “False” to “True”

iii. `AeonixMonitor</ConfigName><ConfigValue>True`

iv. This will let the user know in SeaNavigator if a user is on the phone or not.

Security Alarm System

1. Ask the new user for 3 4-digit keycodes on a handwritten piece of paper

2. When you get the numbers in open up the Copy of Security Central Bold User Codes_2019.xlsx sheet located in OneDrive

3. Search each number and determine if one of the users codes are available.

4. In the first tab, labeled CREATED 09-2014, Find an empty row and put the new user in there with their new code and the date they were added.

   a. Make note of the row number user was assigned to. This will be important for when we add user to the panel

5. In the second tab, labeled Used Numbers, enter the users number at the bottom of the sheet

6. Next, head over to the security panel next to the stairs leading down to support

7. We will enter the users info with a special code.

8. To enter the user, use the following code:

    a. #3396 8 [Users row number, 3-digit] [User code]

    b. It will now ask you what zones you want to provide access, select Yes (1) for all

    c. It should step you through 3 zones. If you don't go through 3 zones- remove the user and add again

9. Ex: We have a new user, named Timmy TwoTacos. Timmy gives us the code 1234

    a. For the love of god, do not let a user use this code.

    b. We look through the sheet and determine that code is not in use and assign him to an empty row of 65.

        i. NOTE: The code requires a 3-number digit. If user is in row 65, the code we enter in the panel will be 065

    c. We go to the panel and enter the code:

        i. #3396 8 065 1234