

# SOP A — New-Hire IT Setup (10-20 minutes)

## *ToroTek LLC — Standard Operating Procedure*

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Set up a new staff member with secure defaults: standard user access, encryption, MFA, password manager, and monitoring. Keep it quick; keep it clean.

### Before You Start

- Windows 10/11 Pro device (or macOS if applicable).
- The employee's name, role, and manager; start date/time.
- Assigned email address and licensing available (M365/Google).
- Authenticator app installed on an employee's phone (Microsoft/Google Authenticator).
- Password manager seats available and a Shared Vault created.
- Access groups decided (matters/practice areas).

### Step-by-Step

1. **Step 1.** Create the user account in your email/identity system; assign a standard (non-admin) role.
2. **Step 2.** Add the user to the correct access groups/folders; deny access to matters they do not need.
3. **Step 3.** Turn on full-disk encryption (BitLocker or Device Encryption) and save the recovery key to the firm's secure location.
4. **Step 4.** Enroll and enforce MFA on email, practice management, e-signature, and the password manager.
5. **Step 5.** Connect to the secure office Wi-Fi (WPA3/WPA2-AES).
6. **Step 6.** Ensure automatic updates are enabled.
7. **Step 7.** If applicable, enable backups (OneDrive/Google Drive) and confirm first backup completes.

### Done-Right Checklist

- BitLocker/Device Encryption shows 'On' and recovery key stored.
- MFA enabled across email and key apps; test a login with MFA.
- Users can access only the folders/cases they need.
- First backup completed successfully or is scheduled within 24 hours.

### When to Call ToroTek

- BitLocker/Device Encryption not available or failing.
- MFA enrollment issues or the user has a lost/stolen phone.

- Licensing conflicts or access exceptions requested by the manager.

### Pro Tips

- Use a long passphrase for the user's master password (e.g., four random words).
- Store the BitLocker recovery key where only owners/managers can access it.
- Create role-based Shared Vaults (Admin, Intake, Finance) to limit exposure.

Need help? ToroTek is here.

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