

TLC Customer Checklist

Preparation prior to appointment:

- Confirm hardware selection.
- Confirm appointment time and location.
- Send a confirmation email to the customer the day before.
- Confirm surplus responsibility.
- Pull the equipment.
- Log the equipment into the CMDB.

Deskside with Customer:

- Confirm with the customer that all their data from their old computer has been transferred.
- Confirm with the customer what equipment is being removed.
- Set up new equipment.
- Confirm with the customer that the equipment and monitor displays are properly placed.
- Boot up new device and have customer log in.
- Confirm that WS1 and the HUB are on the device.
- Confirm the customer can connect to both UAWifi and Edurom.
- Confirm the customer can connect to VPN.
- Confirm the customer can elevate using Admin by Request.
- Provide examples to customers of when they would use it.

Install the following applications:

- Install Outlook

- Confirm that the customer can access folders.
- Confirm that the customer can access their calendar.
- Confirm that the customer can access shared calendars.
- Send a test email.
- Install Teams
- Explain the difference between the two versions of Teams on the start menu.
- Confirm that the customer can access all their Teams channels.
- Confirm that the customer can access SharePoint.
- Sent a test message.
- Install Office Suite
- Confirm that the customer can access Word.
- Confirm that the customer can access Excel.
- Confirm that the customer can access PowerPoint.

Confirm if needed:

- Confirm if the customer needs MS Project or Visio
- Help customer submit form in the Service Catalog to request license.
- Confirm the customer can access Project.
- Confirm the customer can access Visio.
- Install Zoom
- Confirm that the customer can access Zoom.
- Confirm that the customer can schedule a meeting in Zoom.
- Confirm that the customer can access Zoom phone.
- Start a test Zoom.
- Confirm microphone works.

- Confirm the camera works.
- Install Adobe
- Confirm that the customer can access Acrobat.
- Confirm that the customer can access other needed Adobe software.
- Browser
- Confirm that the customer can access their browser of choice.
- Confirm that the customer can access their bookmarks.
- Confirm that the customer browser settings are correct.
- Sophos
- Confirm that the customer can access Sophos.
- Confirm Sophos is active and scanning.
- WorkspaceONE Intelligent Hub.
- Confirm that the customer can access the application catalog.
- Confirm the customer knows how to download the software from the application catalog.
- Confirm the customer can access the support tab.
- Review how to contact support using WorkspaceONE.
- Confirm WorkspaceONE assist is working.
- Box Drive
- Confirm that the customer can access Box Drive.
- Confirm that the customer can access their Box folders.
- Other
- Confirm that the customer can access any additional application they may need.
- Confirm additional applications are in working order.
- Printing

- Confirm that the customer can access and connect to their printer.
- Print a test page.
- Transfer Data from the previous device.
- Confirm that the customer can access their transferred data.
- Confirm the customer has all their data.
- Check for additional Windows updates.
- Recap what was done with the customer and confirm completion.

End of Interaction

- Collect all boxes.
- Collect all additional cables.
- Remove old hardware for surplus.
- Remove any trash.

Upon return to office:

- Dispose of boxes.
- Place extra cables in the corresponding bin.
- Bring old equipment into the surplus staging room.
- Update the CMDB to reflect surplus equipment.
- Note and close the ticket.
- Send a follow-up email.