

SAMPLE RESOURCE / IT ONBOARDING

Begin with a shared inventory.

Use this template to prepare scope, access, responsibilities and service acceptance before operations begin.

Customer / engagement

Service start target

Onboarding owner

1. Covered environment

Inventory area	Reference / location	Owner / dependency
Users and locations		
Devices and servers		
Network and connectivity		
Microsoft 365 / cloud		
Applications and vendors		
Backup / recovery scope		

2. Access readiness

- ☐ Agree delegated access and least-privilege responsibilities.
- ☐ Use an approved secure route for credentials and recovery information.
- ☐ Document emergency access ownership and approval.
- ☐ Identify licensing, vendor and connectivity prerequisites.

Reference where approved access records are held. Do not place passwords, recovery codes or private keys in this checklist.

ILLUSTRATIVE TEMPLATE - NO CLIENT DATA

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Make the handoff explicit.

Confirm operating contacts, escalation paths and remaining gaps before accepting the service.

3. Contacts and authority

Role / escalation level	Named contact / route	Authority / handoff
Customer service owner		
Operational contact		
Security / emergency approver		
Vendor / third-party support		

4. Acceptance checklist

- ☐ Covered inventory and exclusions have been reviewed.
- ☐ Request channels and escalation routes are documented.
- ☐ Maintenance, reporting and review arrangements are agreed.
- ☐ Recovery responsibilities and required tests are understood.
- ☐ Open risks and outstanding onboarding work have owners.

5. Carry-forward items

Outstanding item	Owner	Target / acceptance

Customer acceptance

Service owner

Acceptance date

Record conditional acceptance and unresolved dependencies explicitly. An unchecked item remains a follow-up action.

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