Idea\*Tech Off-Boarding Process

Get the following information from client

1. Automatic reply they want applied to account
2. Whose outlook profile should the former employee’s mailbox be added to (read/manage permissions)
3. Who if anyone should mail be forwarded to

For Technicians

* 1. Convert ProofPoint user account to a functional account to continue mail flow
  2. Change O365 license type from A3/E3 to A1/E1, or convert mailbox to a shared mailbox
  3. Add client provided Out of Office message and give client-specified user read/manage permission for off-boarded user’s mailbox
  4. Remove user from helpdesk client user list and move user access info to archived users' section of HelpDesk
  5. Change user password in Active Directory, disable sign-in, and sync to 365
  6. Create entry on ITA Calendar 90days (about 3 months) in future to follow-up with client for permission to get rid of the account permanently