

Exit Staff - Entire Process

These steps of exiting staff are recorded and also outlined on the GraceLink proccess page here: [People | Grace Church \(ccbchurch.com\)](#) (Weblinks don't work on GraceLink descriptions currently). Notes can also be added on there as well.

This book helps document the way IT cleans up the tech for exiting staff, and aims to streamline this process as efficiently and accurately as possible. It is important to keep this book up to date as much as possible since it ties in several sub processes. It gives a list of each sub process of the Exit Staff process and gives links to the pages that describe each sub process more in detail. Each link opens a new tab that you can close once you are done with a sub process.

Exit Staff Member

When a person is marked as "Done", they will be automatically placed into HR's Offboarding "IT Complete" Queue to let them know that IT has finished the off boarding process for this employee.

- Lock account (<https://admin.microsoft.com/Adminportal/Home?#/users>)
- Append " - Archived" to User's Display Name in Admin Portal. Remove Office string to remove them from Dynamic Endpoint Groups.
- Convert mailbox to shared. ([Active groups - Exchange admin center \(microsoft.com\)](#))
 - If requested, give Mailbox access to manager ([Give Access to Employee... | Grace Church KB \(gracechurches.org\)](#))
 - If requested, give Manager access to OneDrive files ([Give Access to Employee... | Grace Church KB \(gracechurches.org\)](#))
- Remove licenses
- Remove them from groups
- Delete phone account: [Users - Telzio](#)
- Remove access to Adobe (if licensed) (<https://adminconsole.adobe.com/>)

- Collect laptop, Clean and update Lease Spreadsheet if applicable ([Leased Equipment.xlsx \(sharepoint.com\)](#)).
- What to do with Equipment release form? ([Policies](#))
- Update entry in Lansweeper ([Main page - Lansweeper \(graceohio.org\)](#))
- Update User Info in the License Charges Distribution Excel Sheet ([Grace IT - Chargeback - All Documents \(sharepoint.com\)](#))
 - Refer to [Procedure to Update Li... | Grace Church KB \(gracechurches.org\)](#) for importing Microsoft reported / Adobe reported licensing info.
- Remove from Wordpress Sites
- Remove from Uniflow Online User list. (<https://kb.gracechurches.org/books/user-management/page/manage-uniflow-online-users#bkmrk-manage-offboarded-st>)
- Remove access Wordpress.
- Remove access to Ubiquiti UniFi Protect / Network Dashboards.
- Remove access from Canva
- Push to Archive Exited Staff Member Queue

Archive Exited Staff Member

- Archive user's OneDrive files (using User Archive account *user_archive@graceohio.org*)
 - Follow ([Give Access to Employe... | Grace Church KB \(gracechurches.org\)](#)) to give the User Archive Account access to the Exited Staff account.
 - Login to [User_Archive@graceohio.org](#) (credentials in Keepass) and Open up Onedrive.
 - Just dump contents of Exited Staff User's OneDrive into a new folder, named after the User, in the User Archive OneDrive. ([My files - OneDrive \(sharepoint.com\)](#))
 - Upload offline Laptop files if necessary as well.
 - Autopilot-Reset / Wipe the laptop afterwards
- Push to Cleanup Queue

Cleanup Exited Staff Member

- After 60 days being in the Cleanup queue:
- Archive Mailbox (upon request from Manager)
- Delete Microsoft Account (<https://admin.microsoft.com/Adminportal/Home?#/users>)
 - 99% we always do this. There are and may be a few exceptions where certain emails will be potentially be called upon (i.e. Kevin Root) which we want to hang on to for

longer.

- Etc.
- Update User Info in the License Charges Distribution Excel Sheet: [Grace IT - Chargeback - All Documents \(sharepoint.com\)](#)

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