



Client Onboarding Guide – Overview of Best Practices

1. **Deploy AutoElevate System Agents.** (see [System Agent Installation](#)).
2. **Evaluate and adjust the environment** - Use the “[Audit Guide](#)” to evaluate the current security disposition of the computer environment and tighten privilege related security settings.
 - Review UAC Settings. Turn UAC on and set the UAC User and Admin levels to 3, 4, or the desired level.
 - Review use of active users permissions and look for machines where users operate with administrator privileges.
 - Enable System Restore.
 - Ensure Computers have Windows Update and Virus protection in alignment with best practice standards.
3. **Make Rules** – Determine if there are any Company specific actions or applications which would be appropriate for users to be able to be able to carry out themselves. Making rules prior to going “Live” will help reduce the number of requests that users may have by completely automating the elevation of commonly requested actions and applications. Here are some ways you can easily build rules:
 1. Set one computer to “Live” mode and launch each software application. When requests come through, use the mobile or web based Notification application to Approve or Deny while making the desired rules for All Companies, Company, Location, or the Computer.
 2. Move or Copy rules from one of your other Companies. (see “[Moving Rules](#)” and “[Copying Rules](#)” in our support site documentation)
 3. After allowing the system to collect information on Agents running in Audit mode for several days examine the Events in the Admin Portal and determine if there are any computers, users, or applications which will require custom rules. Convert events into rules. (see “[Creating Rules From UAC Events](#)” in our support site documentation)
4. **Review** the end user experience with your client so they know what to expect.
5. **Go Live!**