SOP Template: System and Account Setup for Client Access

This SOP details the **system and account setup for client access**, covering user account creation, access permission configuration, security protocols implementation, password management guidelines, and client onboarding procedures. The goal is to ensure secure, efficient, and consistent access for clients while protecting system integrity and data privacy.

1. Purpose

To define the standardized process for setting up system and account access for clients, ensuring security, compliance, and consistency during onboarding.

2. Scope

This procedure applies to all IT and support staff responsible for client onboarding and account management.

3. Responsibilities

- **IT Administrator:** Responsible for account creation, permission setup, and ensuring security policies are applied.
- **Client Onboarding Team:** Coordinates with IT to ensure timely setup and guides clients through accessing the system.
- **Security Officer:** Conducts regular audits and monitors compliance with security protocols.

4. Procedure

1. **Receive Onboarding Request**
   - Obtain necessary client information (e.g., company name, authorized user details, contact info).
   - Validate the request with relevant documentation and internal approval.

2. **Create User Account**
   - Access the account management system and initiate "Create New User".
   - Input user details as per the information provided.
   - Assign username following naming conventions.

3. **Configure Access Permissions**
   - Assign appropriate user roles and permissions based on client requirements.
   - Apply access controls using the principle of least privilege.

4. **Implement Security Protocols**
   - Enable multi-factor authentication (MFA) where applicable.
   - Set session timeout and monitor access logs.

5. **Set Up Initial Password**
   - Generate a strong, temporary password meeting company policy requirements.
   - Communicate password securely to the authorized client contact.

6. **Password Management Guidelines**
   - Instruct client to change the initial password upon first login.
   - Enforce password complexity requirements and regular password changes (e.g., every 90 days).

7. **Client Onboarding and Access Verification**
   - Provide new user with access instructions and user documentation.
   - Guide client through first login and verify system access.
   - Offer support for any account issues during first access.

8. **Document and Confirm Setup**
   - Update internal records to reflect account creation and permissions granted.
   - Send onboarding confirmation to the client and relevant internal stakeholders.

5. Security and Compliance

- Ensure all activities comply with organizational security policies and regulatory requirements.

- Log and monitor all account access and changes.
- Review and update permissions periodically.

6. Revision and Review

- This SOP will be reviewed annually or as needed based on changes in security policies or technology.
- Feedback from users and incidents will be used to enhance procedures.