

New Starter Onboarding Document

Introduction

We would like to formally welcome you to Fortra and hope you enjoy your first day. This document will provide you with some basic information to get you started.

If at any point you are having technical difficulties, please reach out to IT by either of the following methods:

- Email: itservicedesk@fortra.com
- Visit our new customer portal: [Fortra Help Center - Jira Service Management \(atlassian.net\)](https://atlassian.net/jira/servicedesk/customer/portal/1)
- Contact us on +1952-563-1666

Alternatively, you can reach out to HR by emailing px@fortra.com to ask for them to pass a message to IT for someone to contact you.

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Prerequisites

Before getting started, confirm you have the following:

- The laptop was shipped to you, or we have set you up on a Virtual Desktop Infrastructure (VDI) environment
- The secure email with your initial Fortra* password (also known as HelpSystems/Fortra credentials)
- Internet access – note that for a home system, we recommend confirming you are using at least WPA2 and have a router whose password is NOT the vendor's default. It is recommended to use a network cable for a more stable and faster throughput and to provide a more secure connection.
- An hour for setup time
- If you are part of the Offensive Security (OffSec) team, please review the OffSec Device Setup and Usage section before beginning device setup.

Once you are signed in, please follow the steps below to get started.

- Ensure Microsoft Office Apps are installed, such as Outlook, Word, Excel, etc.
- Sign in to OneDrive to start syncing your data.
- Check for Windows Updates and complete all updates. You may need to reboot a few times to ensure all updates have been completed.
- Sign in to the Company Portal and perform a Sync under settings. Note: Check the Company Portal for any required apps.

*What is HelpSystems? Fortra changed its name from HelpSystems in 2022. Many systems had previously been created as HelpSystems, and you have both HelpSystems.com and Fortra.com versions of your email address – those both refer to the same account.

Pre-Laptop Deployment Accessibilities

If you are still waiting for your laptop to be delivered, or if your work computer has stopped working or is inaccessible, this section will cover what services you can access using your personal computer.

MyApps

Most applications can now be found within your [MyApps](#) section of your Microsoft account. Alternatively, I have provided instructions below on accessing the basic applications directly.

Accessing Cloud Services

You have access to all our critical cloud-based tools and services. Whether you're using a temporary computer, your personal device, or even a smartphone or tablet, all you need is an internet connection to reach these services. Here's how you can access each one:

Microsoft 365 Applications and Services

The entire suite of Microsoft Office products, including Word, Excel, and PowerPoint, is available via a browser. This allows you to create, edit, and share documents, spreadsheets, and presentations from anywhere. Access the Office Online portal via [My Apps](#), using your username (generally first.last@helpsystems.com) and password.

The following enterprise applications are also available through the Office portal:

Email - Your Fortra email and calendar. (For direct Webmail access, visit: <https://outlook.office.com/mail/>)

Teams - Collaboration, IM and video calling (For direct access to Teams, visit: <https://teams.office.com/>)

SharePoint - Hub for team sites, document libraries, and more. (For direct access to SharePoint, visit: <https://helpsystemsllc.sharepoint.com/>)

Personal User Files - Your personal user files are stored securely in the cloud via Microsoft OneDrive. This means you can access your documents, photos, and other files from any device, and you can also share files with colleagues. (For direct access to OneDrive via your browser, visit: [Microsoft OneDrive](#))

Yammer and more!

Jira

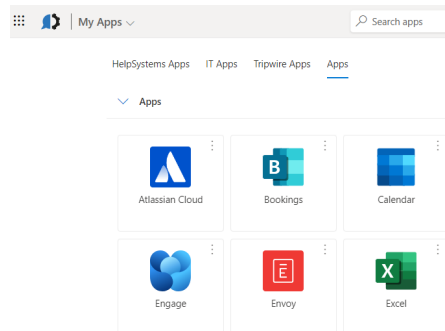
Atlassian provides us with two main platforms, Jira and Confluence. Jira is our main ticketing system for each department, and Confluence is our knowledge-based system.

On your first day, you should have been provided with basic access to Confluence. Confluence is where you will find many FAQs and directions for how the Fortra environments function.

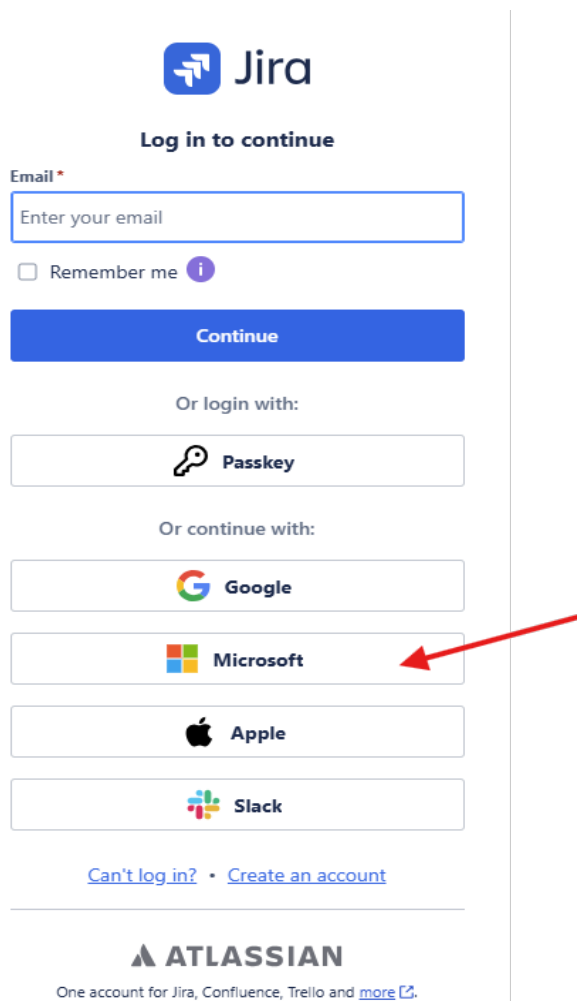
Many users also have Jira immediately – if you need Jira but don't have access, please contact the IT Service Desk.

Atlassian has a lot of built-in “request access” or “request add-on” tools. As this is not the preferred method to request access, we encourage you to skip these and log a service desk ticket.

You can access these applications by navigating to [My Apps \(microsoft.com\)](https://myapps.microsoft.com) on your browser. You’ll log in with your Fortra/HelpSystems credentials when prompted and find a variety of applications you have access to in the launcher. To access your Atlassian account, locate Apps > Atlassian Cloud and click to open.

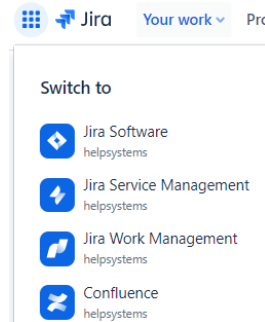


You will then be presented with the following login screen. Please use the Microsoft Link as shown:



Please make sure you select the Microsoft link in order to sign in with your Fortra/HelpSystems Office 365 account.

Atlassian apps have a 9-square icon in the upper left corner that allows you to switch between their apps.



Confluence

The Fortra Knowledge Zone Wiki called Confluence, is a centralised repository for company knowledge, containing everything from departmental procedures to technical documentation. You can use the Wiki to find information, contribute your expertise, or collaborate on documents. Visit the Wiki at <https://helpsystems.atlassian.net/wiki/home> and log in with your username (generally first.last@helpsystems.com) and password to log in.

IT Service Desk Portal

If you encounter any IT issues or require technical support, the HelpSystems Helpdesk Portal is your first point of contact. Here, you can report problems, track the status of your tickets, and communicate with our IT team. Access the Helpdesk Portal at [the IT Service Desk](#) or generate a ticket via email: itservicedesk@fortra.com.

It's important to remember that our IT team is available to support you. If you have any difficulties accessing these resources or need other IT assistance, please submit a Service Desk ticket.

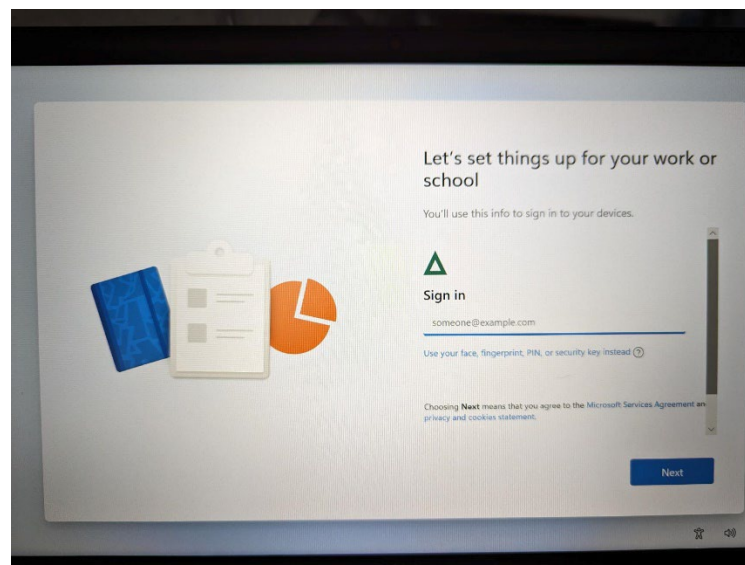
Sales CRM Systems

Microsoft Dynamics 365 and Salesforce are also available via browser. If you need to utilise this in your role, contact your manager for the details that apply specifically to your job role and brand.

Autopilot Deployment Process for Windows

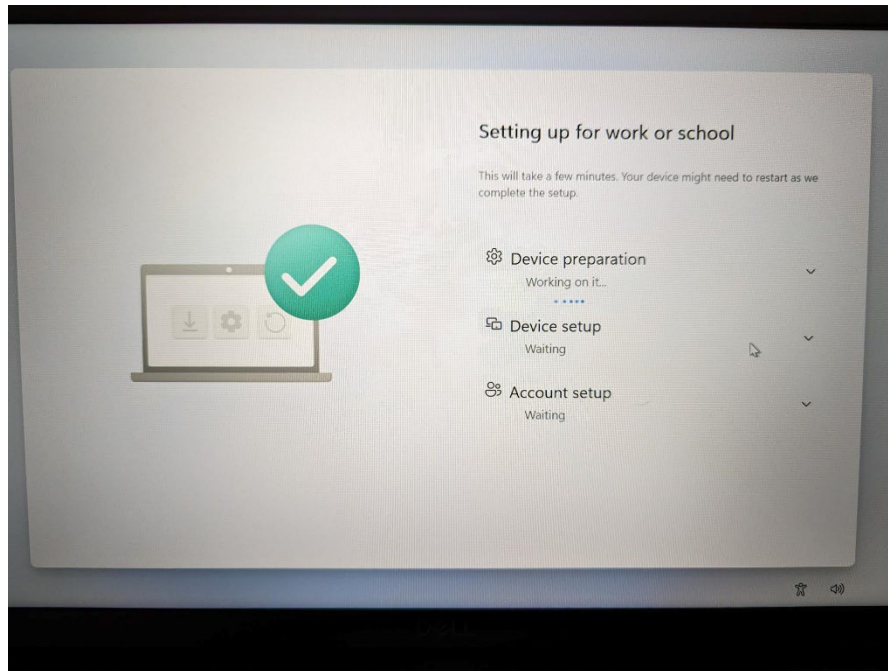
When you receive your device, please follow the steps below to get started and log in. If you do not get the Welcome to HelpSystems window once you have connected to your network, please follow the next step for the [Non-Autopilot Deployment Process](#)

1. Power on the machine and begin with the computer setup.
2. Select the correct region of where you are located, choose the right keyboard layout, and answer the Keyboard layout option by "skipping."
3. Connect to your internet by choosing the correct network listed. (Please do not skip connecting to your internet. This step is crucial to connecting to the HelpSystems account that you will be needing.)
4. Once you connect to your Wi-Fi, you might come to the HelpSystems welcome page. If it does, please insert your HelpSystems email address. If not, please proceed to the [Non-Autopilot Deployment Process](#).



5. As per the below screenshot, it will demonstrate how the necessary applications are being installed. Once it has been completed (should take no more than 60 minutes), your home screen will show up, and you can begin to log in to your Outlook, Teams, and other desktop applications as needed.

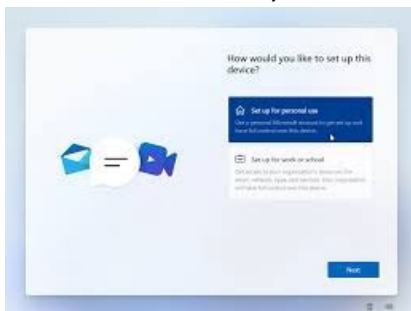
If it takes longer than 60 minutes, please reboot your machine, and it should sign you in. If not, please contact IT.



Non-Autopilot Deployment Process for Windows

If you receive a device and it does not ask you to sign in with your HelpSystems/Fortra account as per the above, please follow these steps to get you set up.

1. Power on your machine and enter your 'regional language and keyboard layout' when requested.
2. Once you have entered your regional language and keyboard settings, it will ask you to connect to the network. Please either connect to your Wi-Fi or insert a network cable.
3. At the "How would you like to set up?" screen, select 'Set up for Work or School':



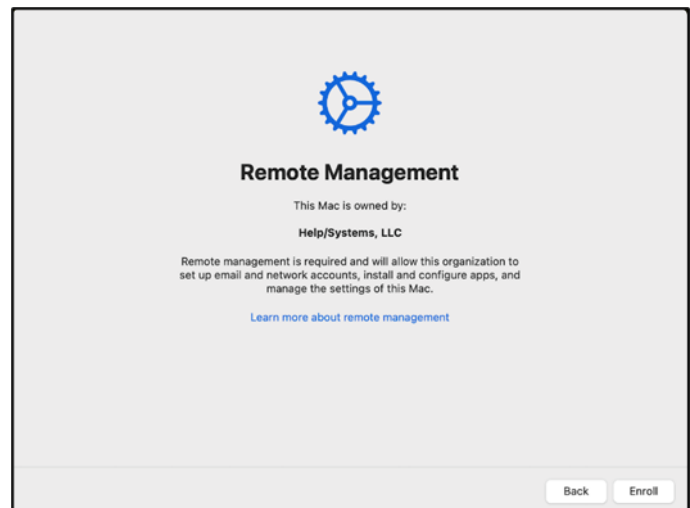
4. It will then ask you to enter a Microsoft account, enter your Fortra/HS credentials, and it should then join you to our tenant.
5. If you encounter any issues, don't hesitate to get in touch with IT.

Apple Device Enrollment

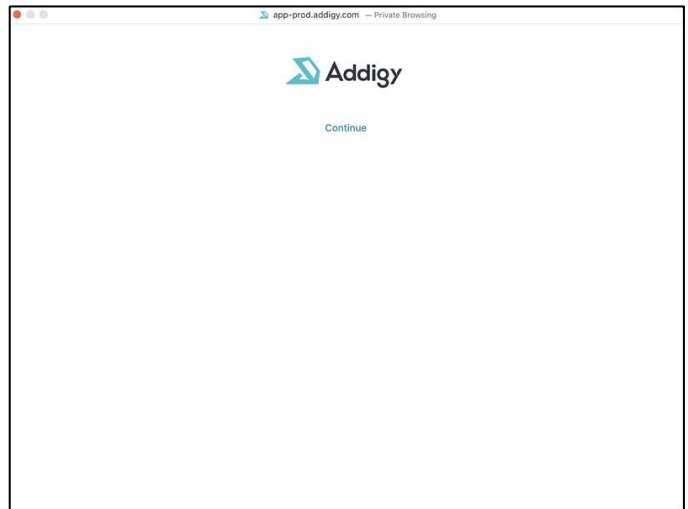
When opening your MacBook, it will automatically start and will show you the “Hello” screen. Press “Continue.”

1. **Choose your language.** This sets the language for your Mac.
2. **Set your country or region.** This sets the format of dates, currencies, temperature, and more for your Mac.
3. **Transfer Your Data to This Mac.** Please choose the option “**Set up as new**”
4. **Written and Spoken Languages.** You can add/remove Preferred Language, keyboard input source and dictation language. You can either choose “**Customize Settings**” or just “**Continue**”
5. **Turn on Accessibility features.** View accessibility options for Vision, Motor, Hearing, and Cognitive abilities, or click “**Not Now**”.
6. **Connect to a Wi-Fi network.** Choose your Wi-Fi network and enter the password.

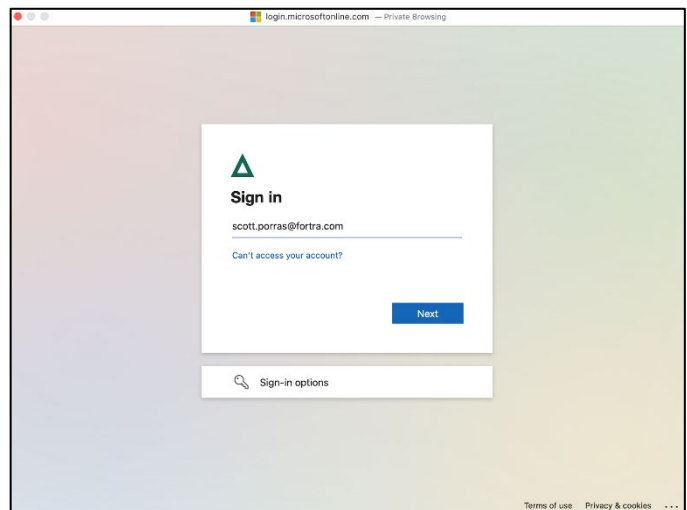
7. **Remote Management.** Automatic device enrollment will start, and this will add the Fortra Addigy profile on the Mac. Click “**Enroll**”



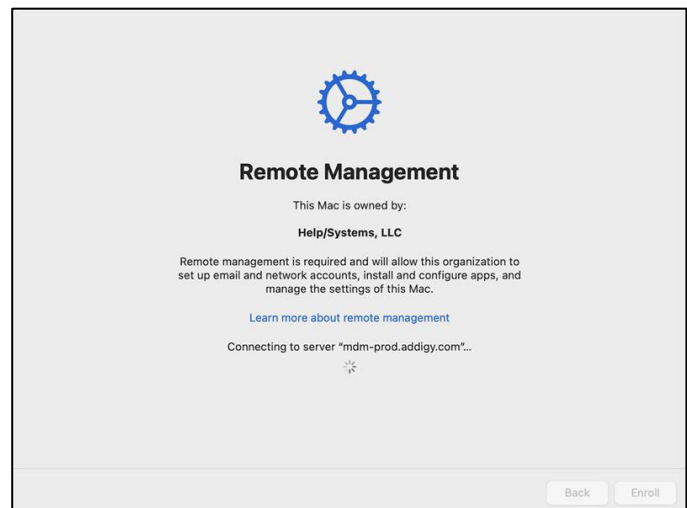
8. Addigy. You will get the Addigy screen to continue with the enrollment. Click **“Continue”**



9. Microsoft Login. You will get a Microsoft login screen, you can use Fortra or Helpsystems email address, type your password and authenticate your login.



10. Remote Management. You will be taken back to the remote management screen. Please let it load the profile for a few minutes. No action needs to be taken at this point; wait a few minutes.



11. Data & Privacy. This is just Apple’s policy information. You can click “Learn More” or just click “Continue”

12. Create a Mac Account. Add your name, then create an account name and password, which can later be used to unlock your MacBook Air or approve other actions. You can add an optional hint to help retrieve your computer account’s password if you forget it. To change your account’s login picture, click it, then choose an option. Click “Continue”

13. Terms and Conditions. You will be prompted to accept Apple’s terms and conditions. Click “Agree”. You will then get a pop-up to confirm you’ve agreed to the terms and conditions. Click “Agree” again.

14. Select your Time Zone. You can choose from the drop-down your closest city, or you can check the box “Set time zone automatically using current location”. If you check the box, you’ll get a pop-up asking to “Turn On Location Services”. You can then click “Continue”

15. Analytics. This is optional, so you can check or uncheck the boxes. Click “Continue”

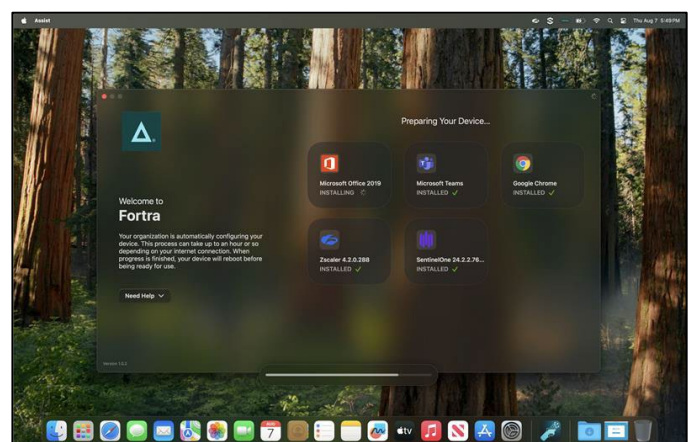
16. Screen Time. You can click either “Set Up Later” or “Continue”

17. Touch ID. Start by placing your finger or thumb on Touch ID to start the setup. You can also click “Set Up Touch ID Later”

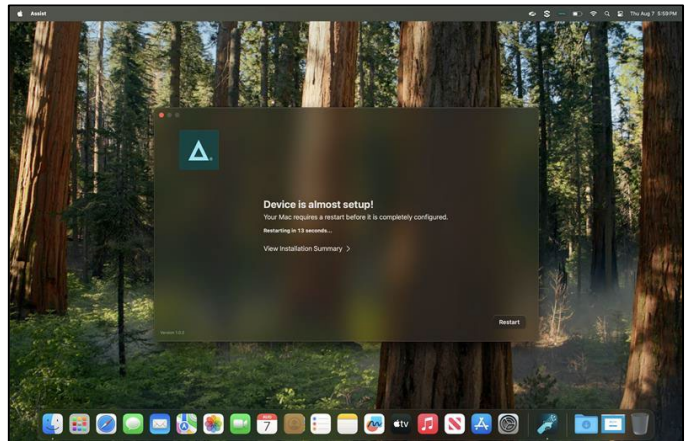
18. Choose Your Look. You can choose the appearance of your dock, menus and buttons. Choose your preference and click “Continue”.

19. Update Mac Automatically. You will be prompted with Automatic Update, and you will just need to click “Continue”. The Mac **Welcome** screen will come up, you can press any key, and it will get you logged in.

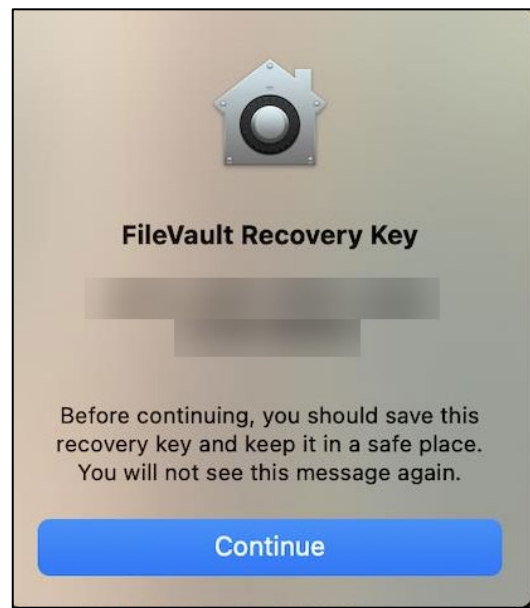
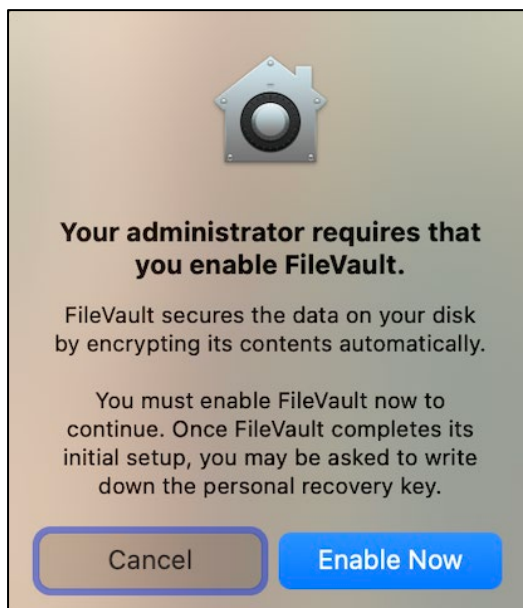
20. Addigy Assist. Once you access the Mac desktop, you will get the “Addigy Assist” screen, which will show you the apps getting installed and the device doing the final Addigy Profile Setup. This part takes time, so you can minimise and work on other things in the meantime.



21. Device is Almost Set up. Once all apps are installed from Addigy Assist, you will get a message saying that the computer requires a restart. You can let the countdown go or click **“Restart”**



22. Enable FileVault. Once the computer restarts, you will get a pop-up asking you to enable FileVault. Click **“Enable Now”**. You will then get your FileVault key, which you can take note of it. Click **“Continue”**

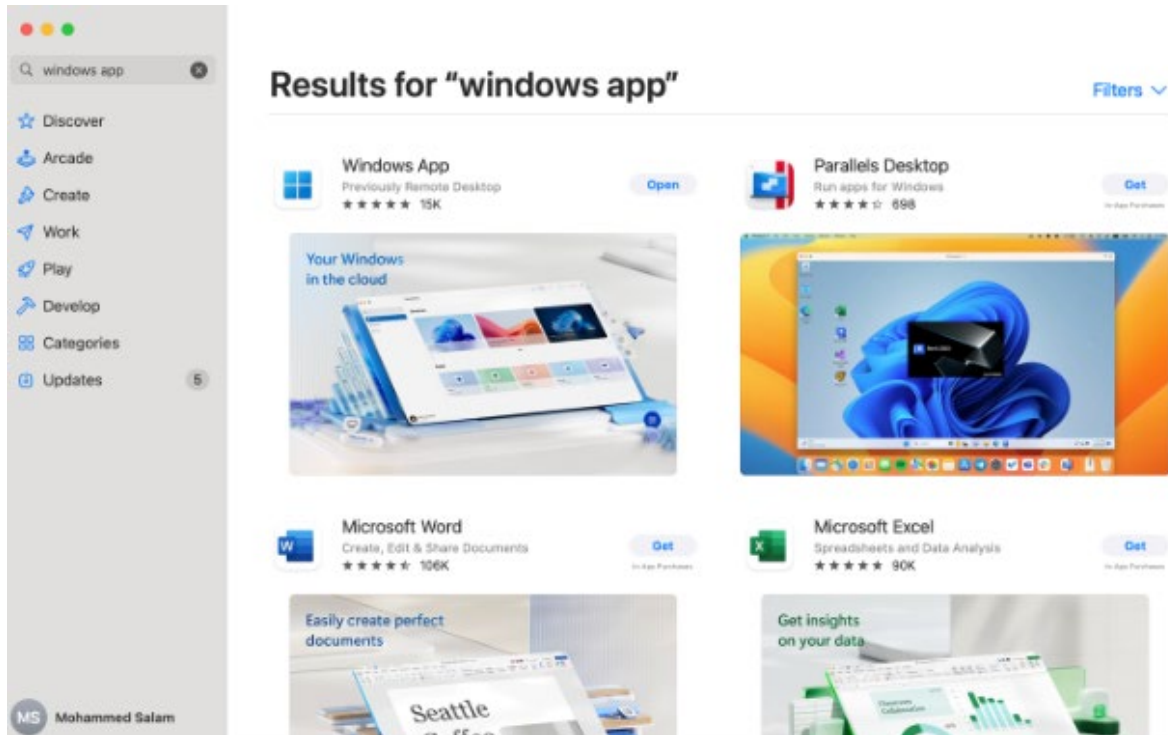


Setup is now complete, and no other steps are required. You can personalized and change settings as needed.

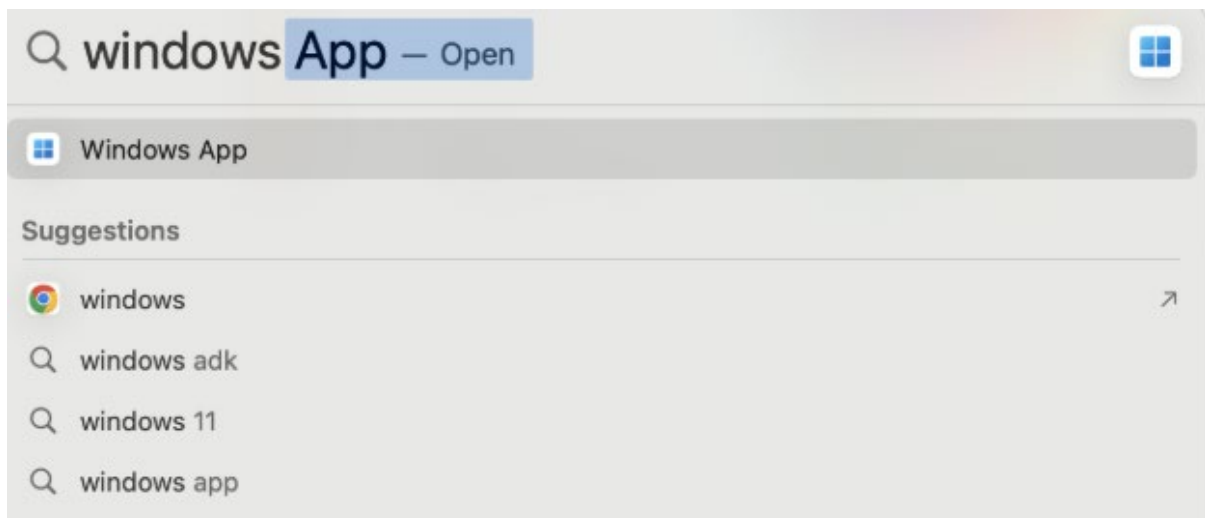
VDI Setup

Please follow the steps below to connect to the VDI provided to you for your daily work.

1. Go to the Apple App Store, search for Windows App and install it



2. Once the Windows App is installed, search for it and open it.



3. Once you open it, at the top right right-click on the '+' icon and select "Add work or School account", when prompted, input your HelpSystems credentials

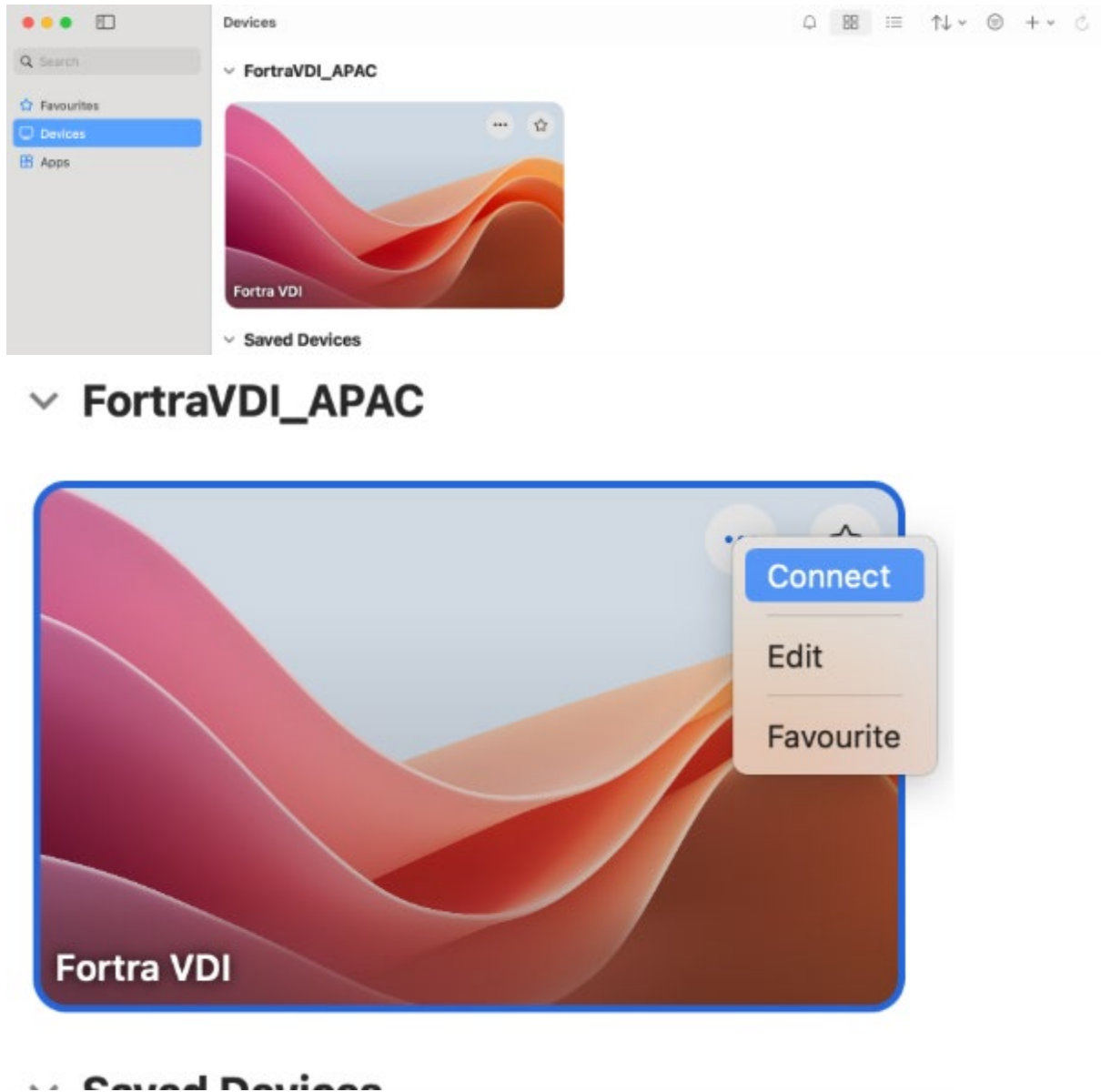


Sign in

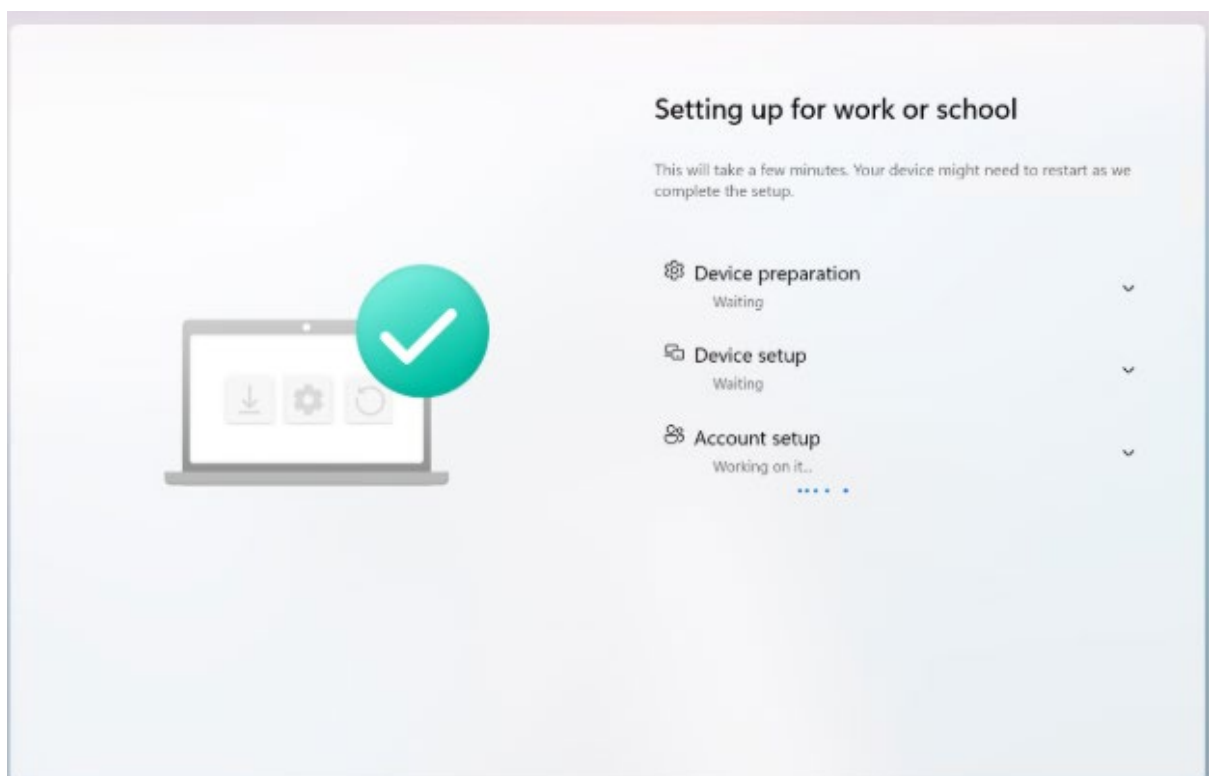
mohammed.salam@helpsystems.com|

Next

- Once you sign in you will see the Fortra VDI Azure Desktop inside the Windows App. Click connect and then sign in to the VDI:

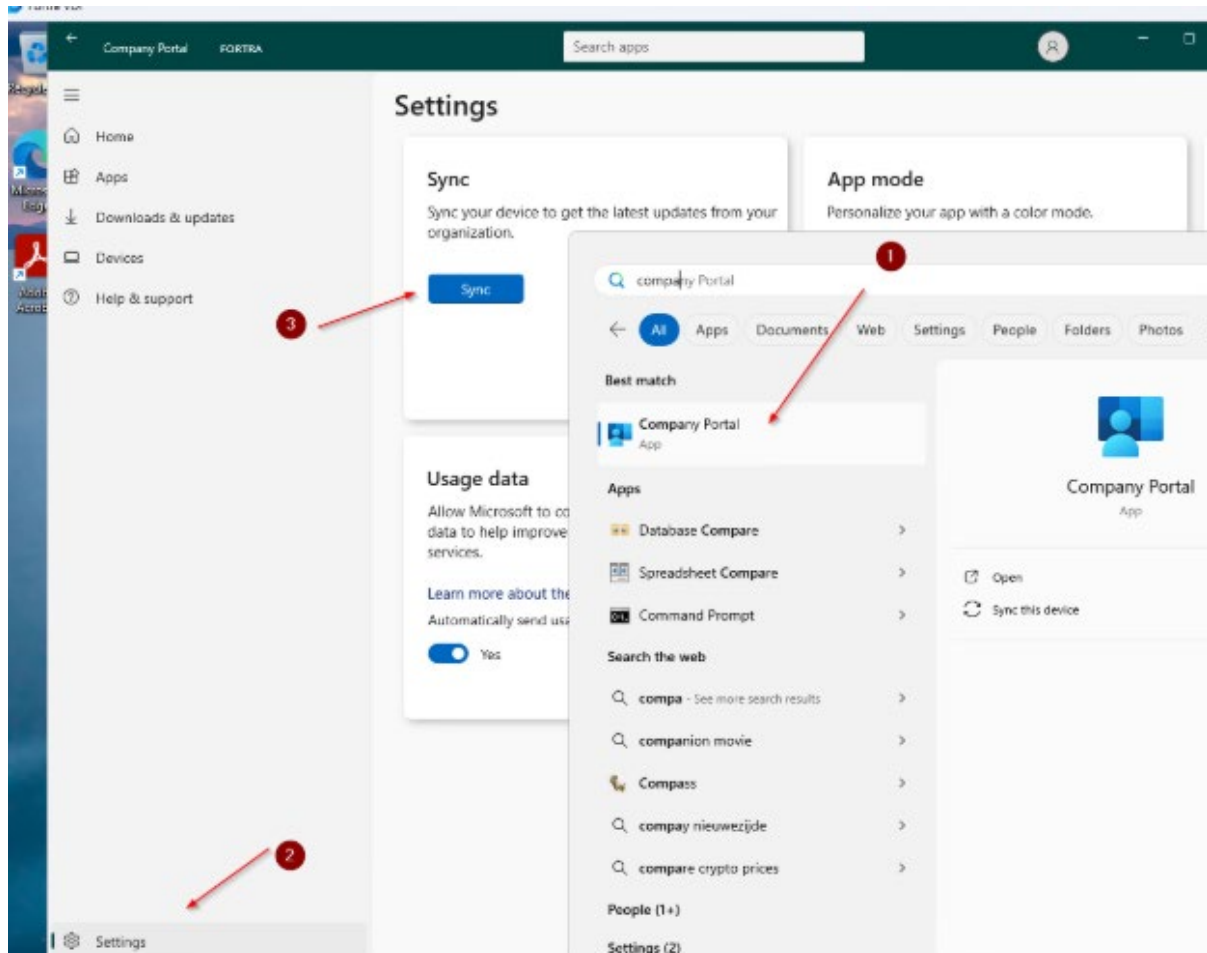


5. Once logged in you will see the following screen of the VDI:



Wait until all the deployment is completed and you will see the working Desktop screen after.

- Now please open the Start menu in VDi and search for Company Portal application. Open it and navigate to Settings icon on the left side, click on it and then select Sync on the opened Window.



After Sync is completed, you will get all security required applications and basic applications deployed. Now you can start working using VDI.

Frequently Asked Questions

- Will all applications needed for Fortra work be provided via the VDI environment?
Yes, all necessary applications for Fortra-related work will be accessible through the VDI (Virtual Desktop Infrastructure) environment.
- Will any Fortra applications or information be available outside of the VDI environment?
No, Fortra applications and information will not be available outside of the VDI environment to maintain security and compliance standards.

3. Should development work be done within the VDI environment?

No. A separate solution will be provided specifically for software developers and other engineers, outside of the VDI environment.

For any issues regarding your IT setup, please contact the IT service Desk via the [portal](#) or email itservicedesk@fortra.com

Offensive Security (OffSec) Device Setup and Usage

Overview

If you are part of the Offensive Security (OffSec) team, you will be issued a dedicated device used for security testing, research, and tooling.

This device operates in an isolated environment and must be used in accordance with the security requirements outlined below.

Device Usage Model

OffSec Device (Testing Environment)

Use this device for the following activities:

- Offensive security tooling
- Research and exploitation tasks
- Lab environments and simulations
- Red team and penetration testing activities

This device must remain logically separated from corporate systems at all times.

Critical Account Guidance (Mandatory)

To maintain security and compliance, the following controls must always be followed.

Do Not:

- Log into the OffSec device using your corporate account
- Sync corporate credentials, passwords, or authentication tokens
- Access corporate email or internal applications from the OffSec device

Required:

- Create and use a local or isolated account on the device
 - Use dedicated credentials for tooling and lab access
 - Store credentials securely using approved methods
-

OffSec Device Setup – Local Account Creation (Windows 11 Pro)

Follow the steps below to configure your device using a local account.

Primary Method (Recommended):

1. Power on the device and connect to a network

2. Proceed through setup until the “Sign in with Microsoft” screen appears
3. Select **Set up for work or school**
4. Click **Sign-in options**
5. Select **Domain join instead**
6. Create a local account:
 - Enter a non-corporate username
 - Set a strong password
 - Configure security questions if prompted
7. Complete the remaining setup steps

Result:

- The device is configured using a local account
- No corporate or Microsoft account is used

Security Rules for OffSec Work

Allowed Activities:

- Offensive tooling within approved scopes
- Exploit development in isolated environments
- Lab testing and simulations

Prohibited Activities:

- Connecting the OffSec device to the corporate network
- Storing corporate data on the OffSec device
- Using corporate credentials in testing environments

Best Practices

Identity and Access:

- Use separate identities for each engagement
- Rotate credentials regularly
- Never reuse corporate passwords

Tooling:

- Install only approved or vetted tools

- Keep all tools up to date

Data Handling:

- Store sensitive findings only in approved corporate systems
 - Do not retain sensitive data locally on the device
-

Support

If you experience any issues with your OffSec device, please contact the IT Service Desk.

Summary

- Use the OffSec device only for approved testing activities
- Never use corporate credentials on the device
- Ensure the device is configured with a local account

Changing your password

Once you have signed into your machine, it is required for you to change your password to ensure your account is secure and safe.

To do this, please follow these simple instructions:

1. Access your Office 365 account by going to <https://portal.office.com> and signing in with the credentials you have been provided.
2. Then, click on your name towards the bottom left corner of the screen and click on View account.
3. Click on the Change Password link, which should then allow you to enter the old password and choose a new one.
4. Keep in mind that your password must contain at least 14 characters, from three of the following four categories:
 - Uppercase characters: (A through Z)
 - Lowercase characters: (a through z)
 - Base 10 digits: (0 through 9)
 - Non-alphanumeric characters: [~!@#\\$%^&* -+=`\|{}\[\];:'"<>.,?/](#)

We would also like to advise the following:

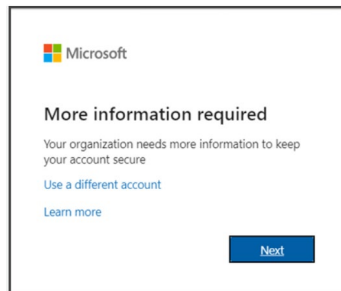
- Encourage the passphrase concept for passwords (no single words or common names).
- Passwords cannot be reused until 20 unique passwords have been cycled through.
- Once a new password is set, the password cannot be changed again for 24 hours. If you need to make a change, please contact IT.
- Accounts will be locked after 5 invalid logon attempts for 1 hour.
- Please feel free to contact IT if you need your account to be unlocked.
- We encourage the use of password vaults, except for this passphrase. Please memorise your chosen passphrase.
- This Passphrase will need to be changed regularly per the company security policy.

If you experience any issues after changing your password, please contact IT, and they will be able to help.

Microsoft Multifactor Authentication (MFA)

We use Microsoft's Multifactor Authentication (MFA) to provide an additional verification method to log into Microsoft Office 365 applications such as Teams, Outlook, OneDrive, SharePoint, etc.

Once you have signed in for the first time, you will be presented with a More Information Required box such as the following:



The preferred method of verification is via the Microsoft Authentication app (mobile app) that you will need to install on your mobile device.

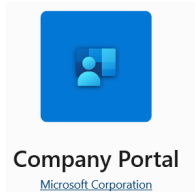
Please, simply click next to the above dialogue box and follow the instructions on how to set up the authentication.

Installing Basic Application

Now that you have successfully logged onto your machine, we will show you how to install some basic applications.

We are going to use an application called Company Portal. If this has not yet been installed, please follow the steps below. If it is already installed, continue to step 5 below.

1. Search for the Microsoft Store by clicking in the Windows Search box towards the bottom left corner.
2. Once it is open, search for Company Portal as below:



3. Then click on Get.
4. Once it has been installed, open it up and continue to the next steps.
5. Now you have it opened, you will be asked to sign in. Please sign in with your Fortra credentials.
6. Once signed in, it will ask you to choose from a few options; you want to select User Workstation.
7. Once you are fully signed in, you should be able to see all available apps you can download and install without admin consent.

If you do not see an application there that you need to install, please contact itservicedesk@helpsystems.com, and we will either push the installation to the Company Portal or provide you with the install file.

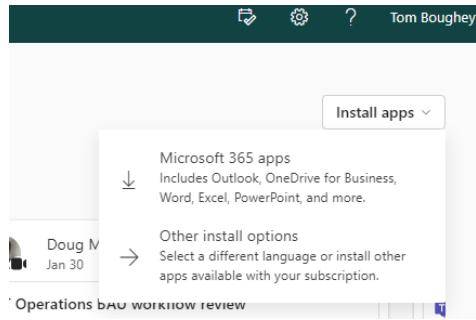
Manually Installing a Microsoft Application

If, for some reason, Microsoft Office applications, such as Outlook and Teams, have not been installed, you can use the following links to manually install these applications.

Teams: <https://www.microsoft.com/en-gb/microsoft-teams/download-app>

Office Suite: <https://portal.office.com>

You will need to sign into the Office portal using your HS/Fortra credentials, then simply click on Install apps, then Microsoft 365 apps, and it should download the full Office suite.



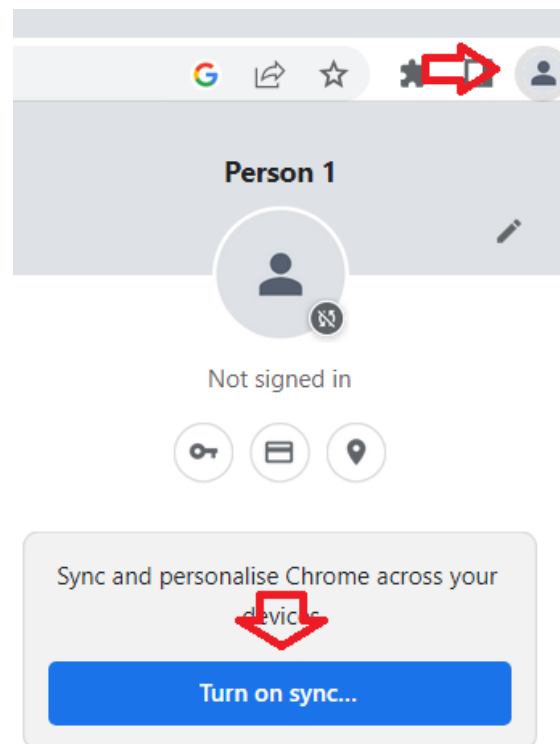
Syncing browser bookmarks and saved passwords

This will show you how to sync your bookmarks and saved passwords. It will cover how to do this on both Chrome and Edge. If you use any other browser, such as Firefox, then I would simply replicate the steps shown below for Chrome.

Chrome

Unlike Edge, Chrome does not sign you in with your Fortra/HelpSystems account. Instead, we will create a Gmail account purely for work purposes. If you want to use your personal Gmail account, then feel free to sign in with your personal Gmail account and start syncing with that account. If not, please follow the steps below.

1. Open Chrome, click on the people icon towards the top right corner of the page, and select Turn on sync.



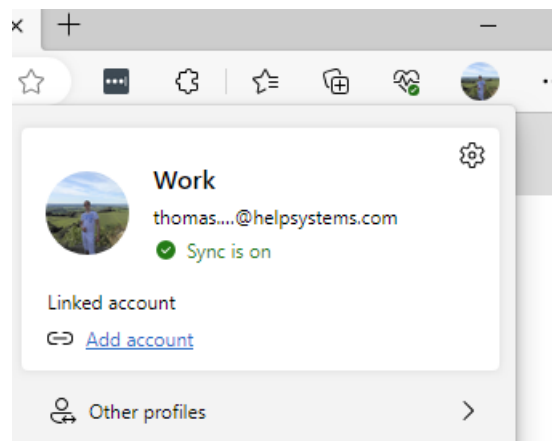
2. This will then open a new tab where it asks you to sign in. There will be a link to create an account. click on this link and choose For Work or My Business.
3. Enter your first name and last name (optional), and then Next.
4. Enter your D.O.B. and gender, then Next
5. You can choose one of the pre-populated email addresses, but as this is for work, I would suggest maybe creating an email address such as tom.fortra@gmail.com, but this is totally up to you.
6. Create a memorable password and then Next.
7. Now, for the recovery, this again is up to you, which one you use, but I'd suggest using your Fortra/HS address. Alternatively, you can skip this if you'd like.

8. Next, it offers to add a phone number, again, this is optional, so you can skip this if you'd like.
9. Now, review your account info and click Next.
10. Then, scroll to the bottom of the screen and click I agree and then confirm.
11. Finally, it asks you to set up your business. Just click Not Now.
12. It should then ask if you want to turn on sync, and you want to select Yes, I'm in.
13. You should now be all done, and all your bookmarks and saved passwords should be synced to your new Gmail account.

Edge

With Edge, as long as it is a Fortra-deployed machine, it should automatically sign you in with your Fortra/HelpSystems account. Below is how to check and make sure it is syncing.

1. Open Edge, and you should see your account towards the top right corner of the page.



This is what it should look like.

2. If you are not signed in, simply click on the link that says Sign in to sync data.
3. If it asks for an email address and password, this will be the same as what you sign into your Microsoft account.