
How to Enroll
Consultant Owned
Mobile Devices in
Intune



DIVISION OF
CONSTRUCTION
CALIFORNIA DEPARTMENT OF TRANSPORTATION

User Guide

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Use this guide for the enrollment of consultant owned iPads into Intune. This will allow access to applications behind the Caltrans firewall to perform contract administration. Please ensure that only one mobile device per consultant is enrolled. It's critical that all steps are followed correctly. **Be sure that consultants are issued a P Number before starting iPad enrollment into Intune. Guidance has been provided in this document on how to request a P Number.**

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Enrollment Quick Guide Step Reference

Below is a list of the steps that will be necessary to enroll a consultant owned device in Intune to access Caltrans applications. Each step below has additional guidance within the document to help you navigate through the enrollment process. Clicking on any of the steps below will take you to that part of this document for more detailed step-by-step information on the process.

Step 1 (Caltrans Senior): Ensure that the consultant has already obtained a P Number. An active P number will be required before enrollment in Intune can begin. To request a new P Number please refer to section, [“Creating New Partner Account ADM-2025P and ADM-3028 and ADM-3011”](#). If they already have a P number, please ensure that it’s active and not expired since it expires in 1 year. If P number is expired and needs to be renewed, please refer to section, [“Annual Renewal of Partner Account”](#).

Step 2 (Caltrans Senior): Submit a SNOW Ticket requesting the consultant (include P number) be added to the Intune “IntuneMDM-ConsultantDeviceDOC” group. Be sure to also request additional district “groups” if there are specific applications that download on those devices. For example, District 4 has an MCIN application available. You can also request multiple consultants on the same SNOW ticket, if necessary. Please refer to Section, [“SNOW Ticket Procedure to add Consultant to Intune Group”](#).

Step 3 (Caltrans IT): Add the consultant to the Intune specific “IntuneMDM-ConsultantDeviceDOC” group along with other requested district specific profile groups upon receipt of the SNOW Ticket.

Step 4 (Caltrans Senior): Notify consultants that they can proceed with enrollment in Intune with their company owned devices once the snow ticket has been fulfilled.

Step 5 (Consultant): Proceed with device enrollment in Intune by following the directions in the preceding sections of this document. Please refer to section, [“Procedure to Enroll Consultant owned iPhone or iPad into Caltrans Network”](#).

Step 1: Assigning or Updating P Numbers to Students or Consultants

Creating New Partner Account ADM-2025P and ADM-3028 and ADM-3011

1. Work with partner to fill out [ADM-2025P, "Partner Photo ID Badge Building Access Control Card Request,"](#) and provide a photo of their driver's license or passport and a headshot with a solid background wearing no hats or glasses (religious or cultural head dressers are ok).
2. When ADM-2025P is filled out route for appropriate signatures in Adobe Sign.
3. Send the ADM-2025P to hq.security.operations@dot.ca.gov or the Local District Office Management to have the P number assigned and Partner ID issued
4. When new P number is issued, work with partner to fill out forms [ADM-3028, "Non- Employee Network Account Request,"](#) to set up their network access.
 - a. If the partner employee will not be provided a state mobile device they will also need to fill out [ADM-3011, "Employee Email Multi-Factor Authentication Agreement,"](#) to get approval to have MFA-Authenticator installed on a personal phone.
5. When ADM-3028 and ADM-3011 are filled out, route them for appropriate signatures in Adobe Sign.
6. When all forms are signed, submit a SNOW Ticket to set up their user accounts.
 - a. In the SNOW service portal select > Request for Service > Account Services > Create or Update Account > Then fill in the appropriate fields for the network access being established.
 - (1) Forms ADM-2025P, ADM-3028, and ADM-3011 will need to be attached to this SNOW ticket.
7. Once SNOW ticket is submitted the process will shift to working with the partners and IT to ensure appropriate access is granted.

Annual Renewal of Partner Account

1. Work with partner to fill out [ADM-2025P, "Partner Photo ID Badge Building Access Control Card Request,"](#) for account renewal.
2. When ADM-2025P is filled out route for appropriate signatures in Adobe Sign.
3. Send the ADM-2025P to hq.security.operations@dot.ca.gov to have the P number renewed.
4. When HQ Security Operations replies with P number renewal confirmation, work with partner to complete [ADM-3028, "Non-Employee Network Account Request,"](#) to renew their network access.
 - a. If the partner employee will not be provided a state mobile device they will also need to fill out [ADM-3011, "Employee Email Multi-Factor Authentication Agreement,"](#) to renew access to MFA-Authenticator on their personal phone.
5. When ADM-3028 and ADM-3011 are filled out, route them for appropriate signatures in Adobe Sign.
6. When all forms are signed submit a SNOW Ticket to set up their user accounts.
 - a. In the SNOW service portal select > Request for Service > Account Services > Create or

Update Account > Then fill in the appropriate fields for the network access being established.

(1) Forms ADM-2025P, ADM-3028, and ADM-3011 will need to be attached to this SNOW ticket.

7. Once SNOW ticket is submitted the process will shift to working with the partners and IT to ensure appropriate access is granted

Step 2: SNOW Ticket Procedure to add Consultant to Intune Group

Before you begin the process:

1. Please ensure that the consultant that you will be requesting Intune access for has an active P number.
2. You have received the serial number of the company owned iPad that is assigned to the consultant.

SNOW Ticket Request process:

1 **caltrans** SNOW Quick Start Guide Request for Service Find Answers My Requests 1 System Status

IT Service Management Portal

How can we help?

Request for Service
Browse the catalog for services you need

Find Answers
Search for knowledge articles

Report a Problem
Submit a form to create an incident

Current Status
No system is reporting an issue
[More information...](#)

Announcements
No information available

My Open Incidents/Requests/Interactions
Business Application Ad Hoc Service Request
RITM0291280 - about a month ago
[View Historical/Closed Incidents/Requests](#)

Open SNOW Service Portal and click on “Request for Service”

2 Home > Service Catalog > All Categories

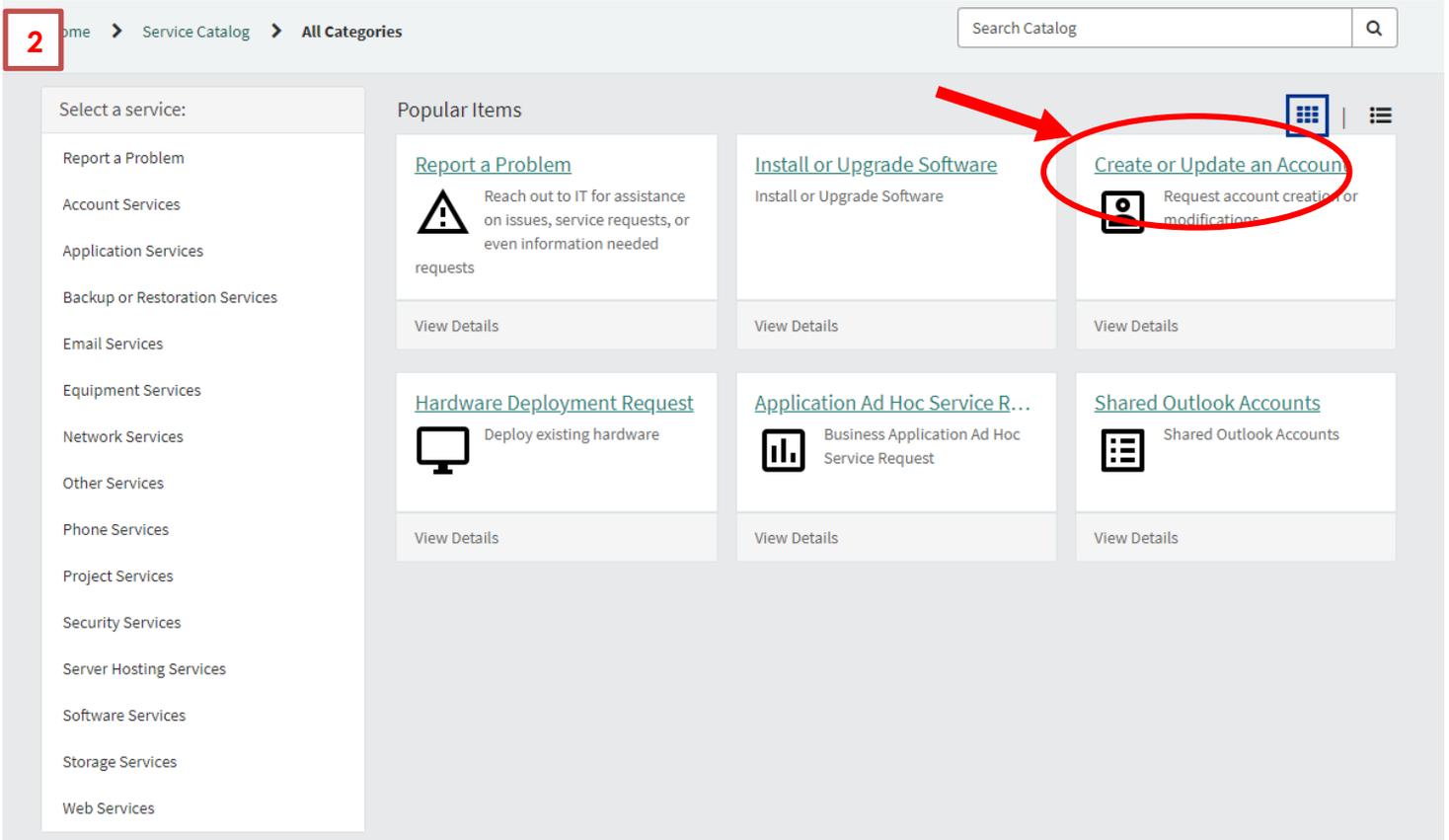
Search Catalog

Select a service:

- Report a Problem
- Account Services
- Application Services
- Backup or Restoration Services
- Email Services
- Equipment Services
- Network Services
- Other Services
- Phone Services
- Project Services
- Security Services
- Server Hosting Services
- Software Services
- Storage Services
- Web Services

Popular Items

- [Report a Problem](#)
Reach out to IT for assistance on issues, service requests, or even information needed requests
View Details
- [Install or Upgrade Software](#)
Install or Upgrade Software
View Details
- [Create or Update an Account](#)
Request account creation or modifications
View Details
- [Hardware Deployment Request](#)
Deploy existing hardware
View Details
- [Application Ad Hoc Service R...](#)
Business Application Ad Hoc Service Request
View Details
- [Shared Outlook Accounts](#)
Shared Outlook Accounts
View Details



Click on “Create or Update an Account”

3 Home > Service Catalog > Account Services > Create or Update an Account Search Catalog

Requester Details a

* Requested for Requested by

* Primary Contact for Request * Preferred Method of Contact

Email * Requested For District

Request Information b

* Request Type

Account Type (Select All that apply)

* Options

- Network Accounts
- Microsoft Outlook (include email groups you need the individual to be added to in the Additional Comments)
- Mainframe Account
- EPO
- VPN
- MFA-Authenticator
- Intune - Mobile Access (iPhone/iPad) c
- Other

* Please provide additional details d

Additional Comments e

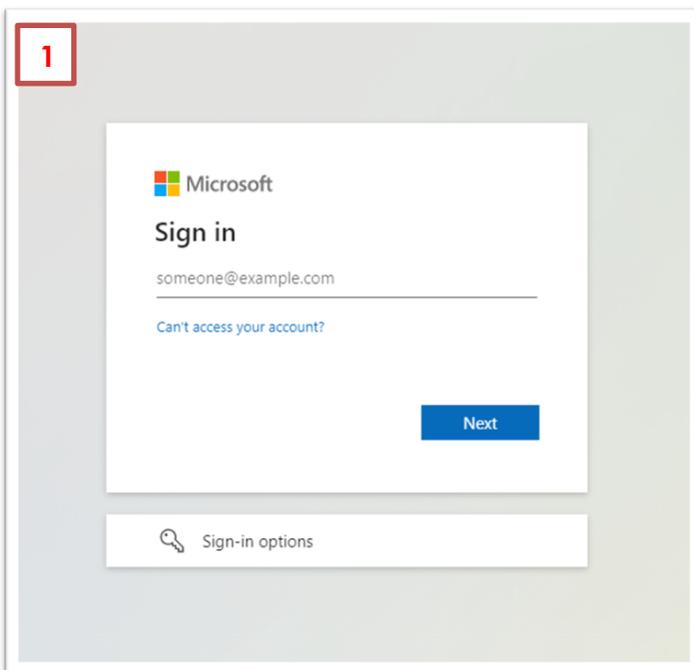
f

- a. In the "Requestor Details" section – Leave/Insert **YOUR INFORMATION** in the "Requested for" and "Requested by" fields.
- b. Under the "Request Type" select "**Modify**"
- c. Under the Account Type select the **Intune-Mobile Access (iPhone/iPad)** Option
- d. In the "Please Provide additional detail" field, Add the following information: **Please add Construction Consultant(s) to Intune Group – "IntuneMDM-ConsultantDeviceDOC"**
- e. In the "Additional Comments" field, Add the **Consultant Name, P Number, and iPad Serial Number**. Multiple Consultants can be added per SNOW Ticket, if needed. See example format above.
- f. Once all required information has been added to the fields, as shown above, click on the submit button.

Step 3: Procedure to Enroll Consultant owned iPhone or iPad into Caltrans Network

Before you begin the process:

1. Please ensure that your device has the latest iOS version, currently 17.0.3 as of the posting of this document.
2. During enrollment you may need to use your laptop/PC to set up the authenticator application (<aka.ms/mfasetup>).
3. On your laptop/PC go to <aka.ms/mfasetup> and sign in with your Caltrans credentials. Please ensure that your device is connected to the Caltrans network (or VPN). This will be used later when setting up Microsoft Authenticator



Step 4: Setup Your Device

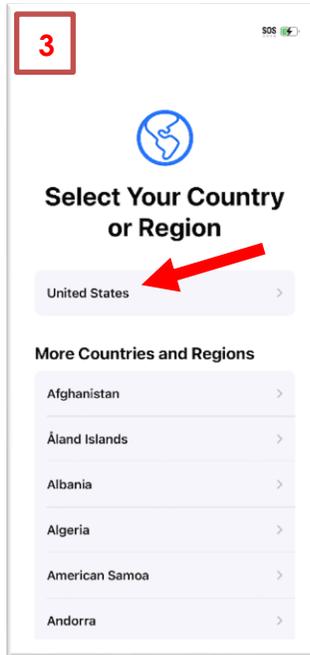
Enroll into Intune > Setup Assistant



Swipe Up



Tap "English"



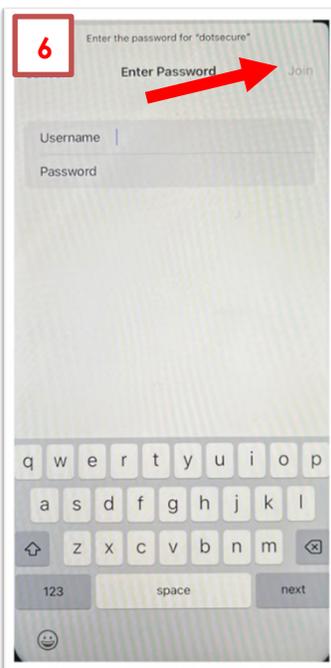
Tap "United States"



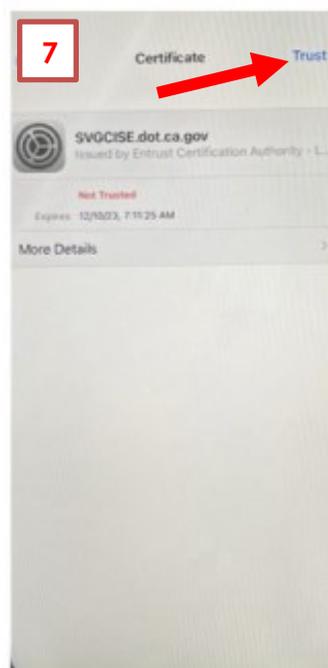
Tap "Set Up Manually"



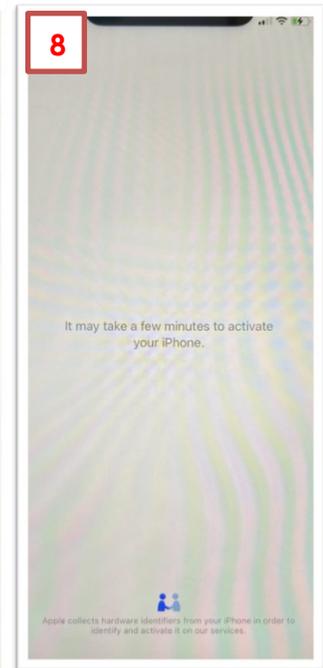
Choose connection type Wi-Fi or Cellular (Continue without Wi-Fi)



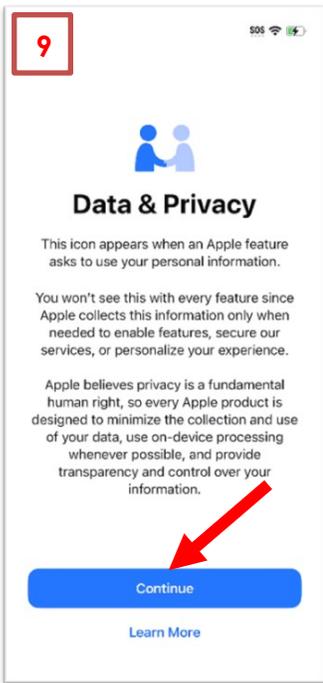
Enter your Wi-Fi credentials and press join



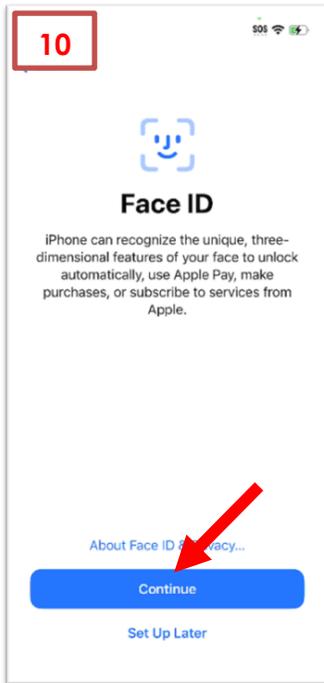
If you are using DOT Secure tap trust



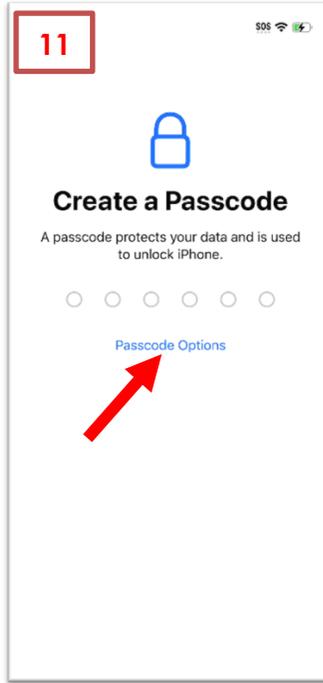
Wait for activation from Apple



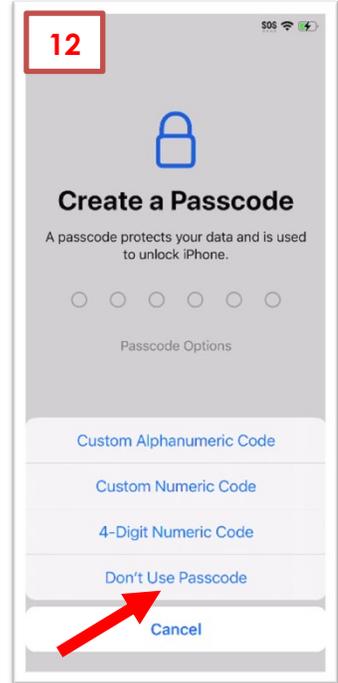
Tap Continue



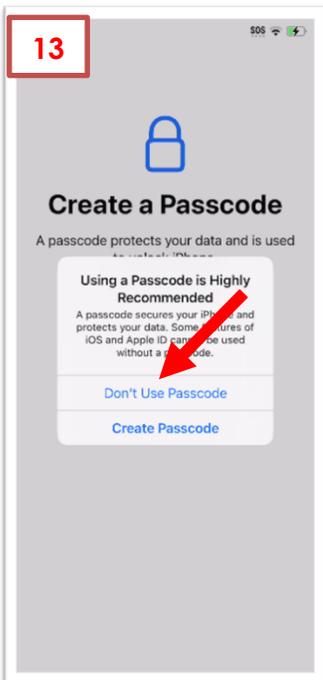
Face ID is Recommended to be setup but is optional



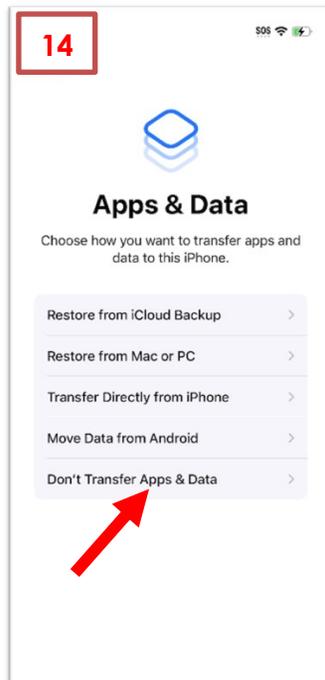
Tap Passcode Options



Tap Don't Use Passcode (Passcode will be created later)



Tap Don't Use Passcode (Passcode will be created later)



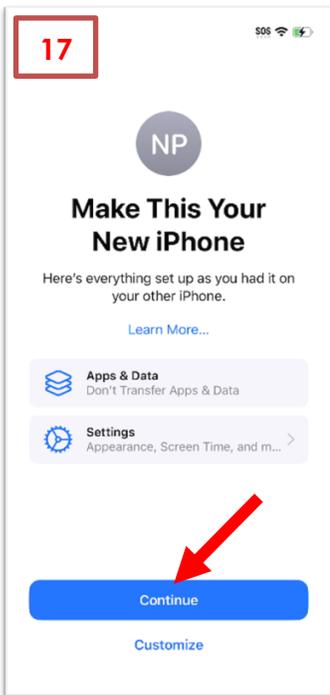
Tap Don't transfer Apps & Data



Sign in with or create an Apple ID (follow prompts as they appear)



Wait for Apple ID to be set up



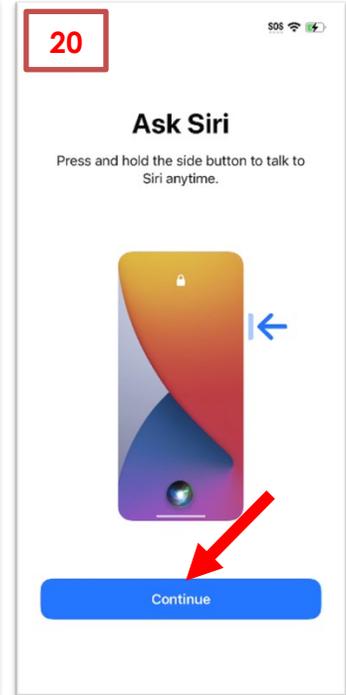
Tap Continue



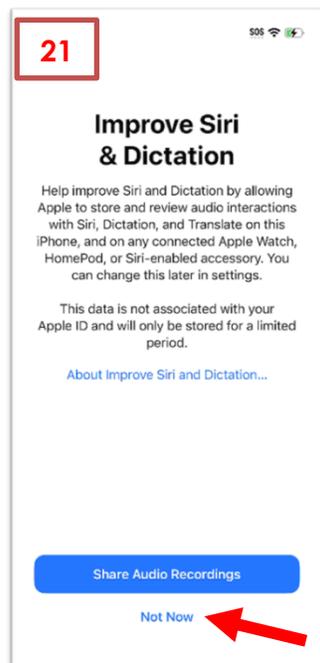
Tap Continue



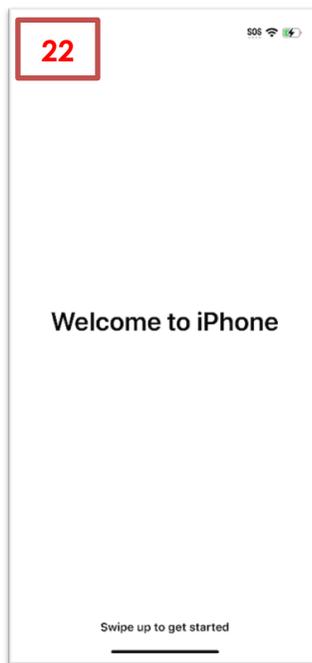
Follow Prompts as they appear or tap Set Up "Hey Siri" later



Tap Continue



Tap Not Now

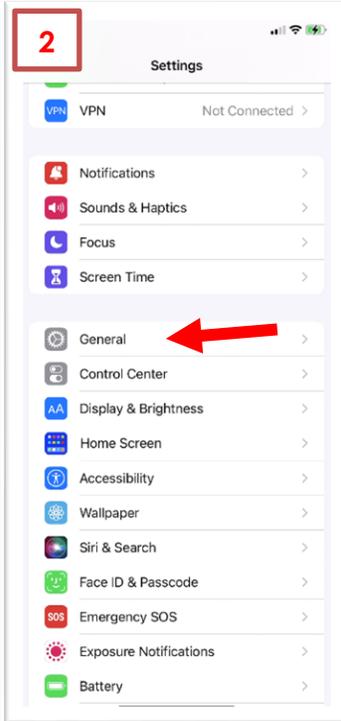


Swipe Up

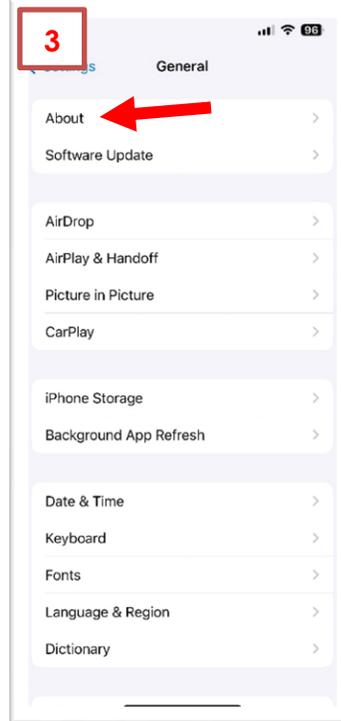
Conventional Device Name for Intune Reporting



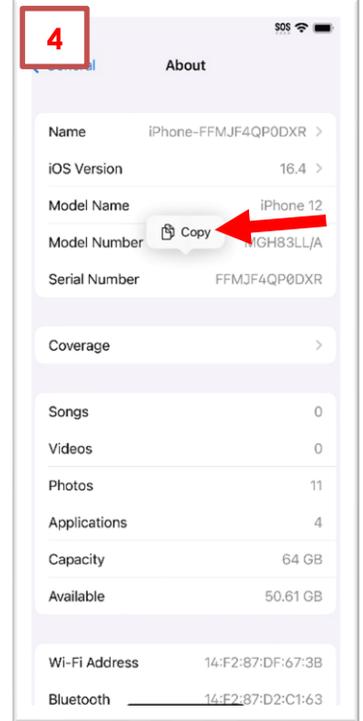
Open the “Settings” app



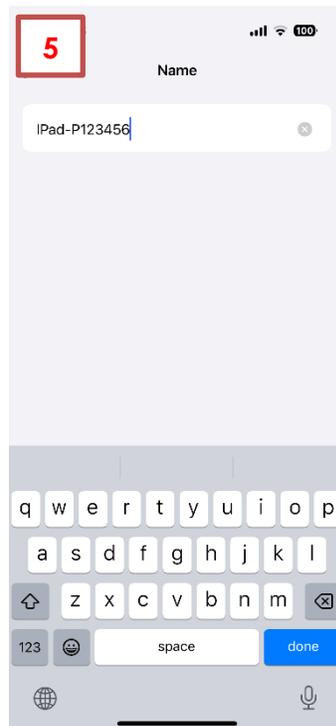
Tap on “General”



Tap “About”



Copy the serial number by pressing down on it and then tapping “Copy”



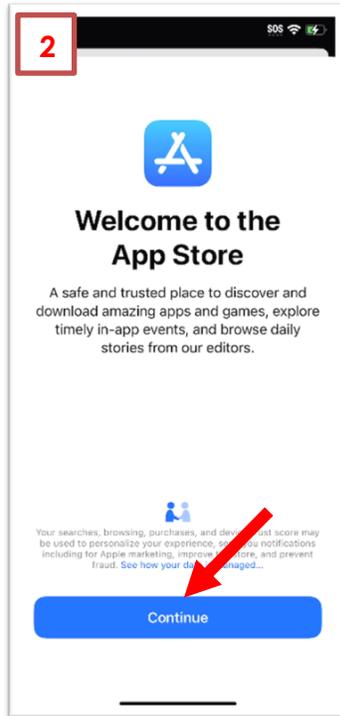
Rename the device following the format “iPad-P Number”

Step 5: Enroll Device in Intune

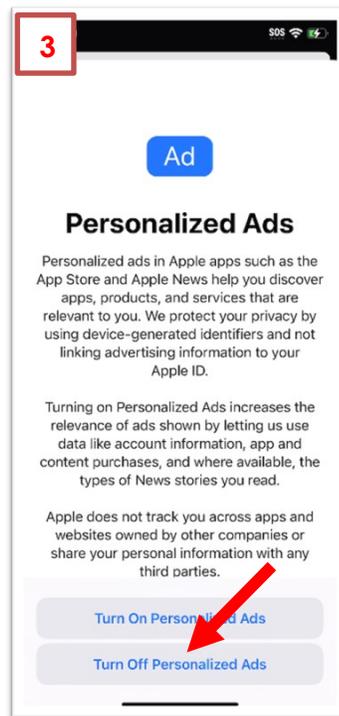
Download Company Portal



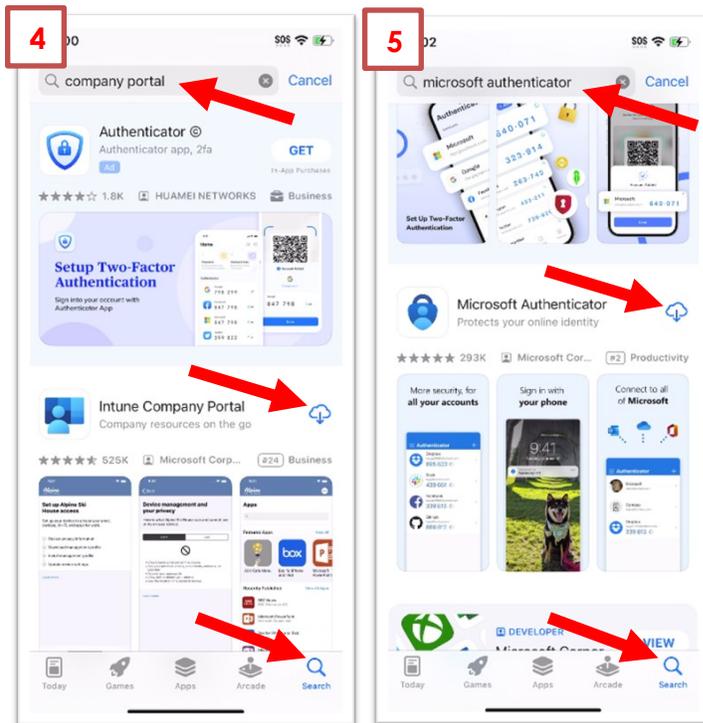
Open the App Store



Tap "Continue"

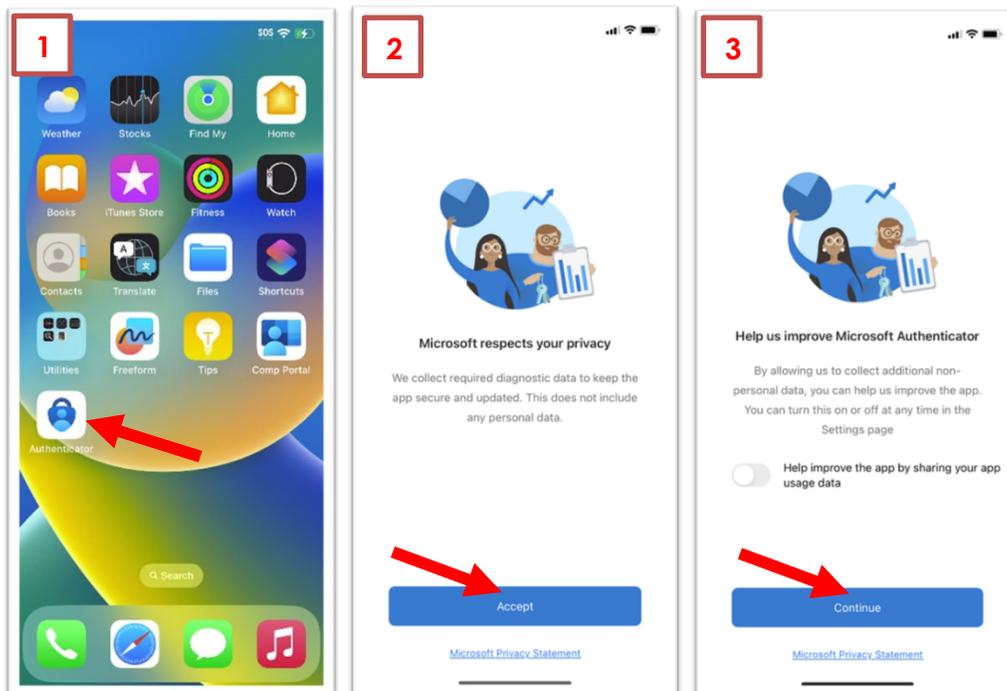


Tap "Turn Off Personalized Ads"



Search for and Install the “Company Portal” and “Microsoft Authenticator” Apps

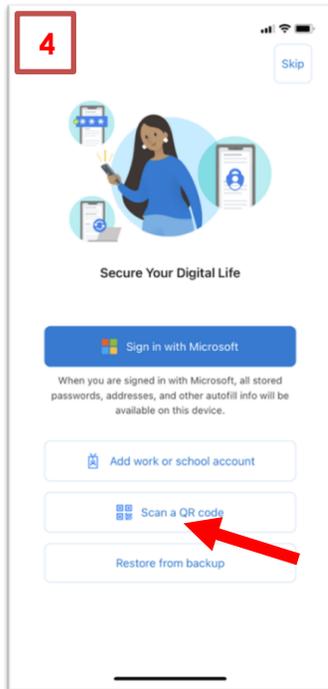
Setup Microsoft Authenticator



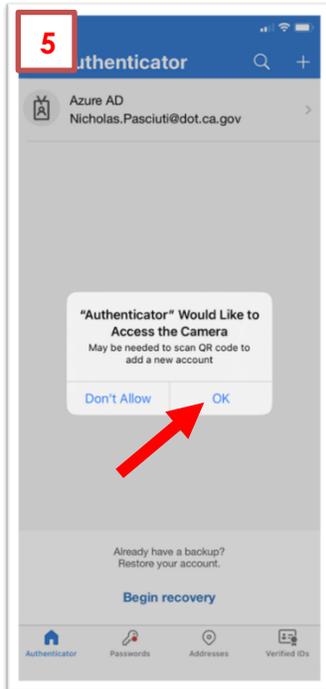
Open Authenticator

Tap “Accept”

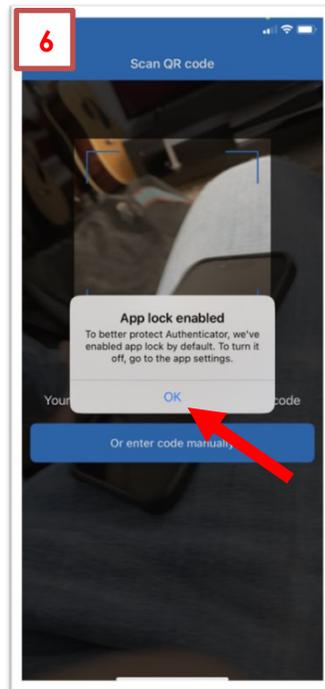
Tap “Continue”



Tap "Scan a QR code"

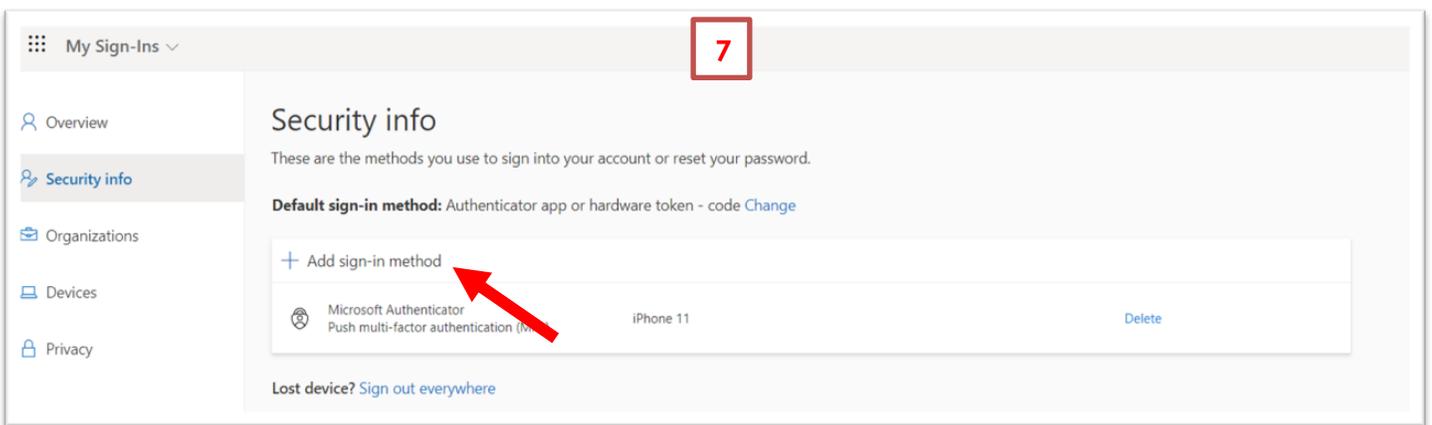


Tap "OK"

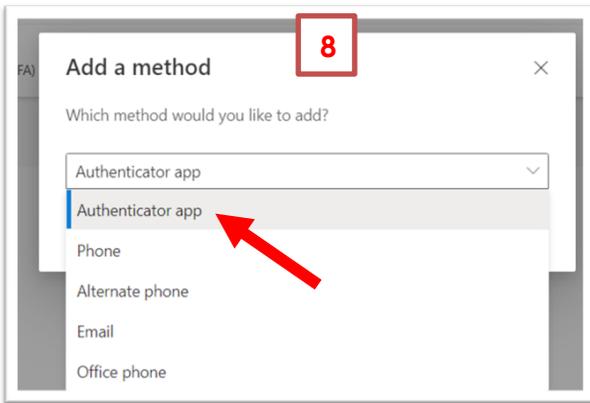


Tap "OK" if this prompt appears

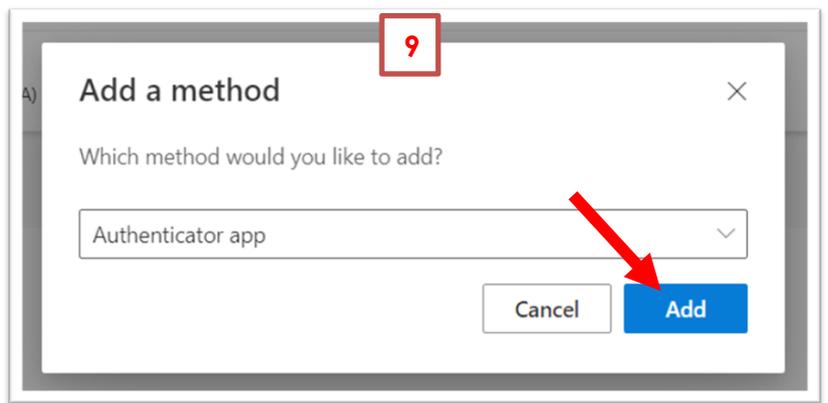
Microsoft Authenticator – Laptop/PC



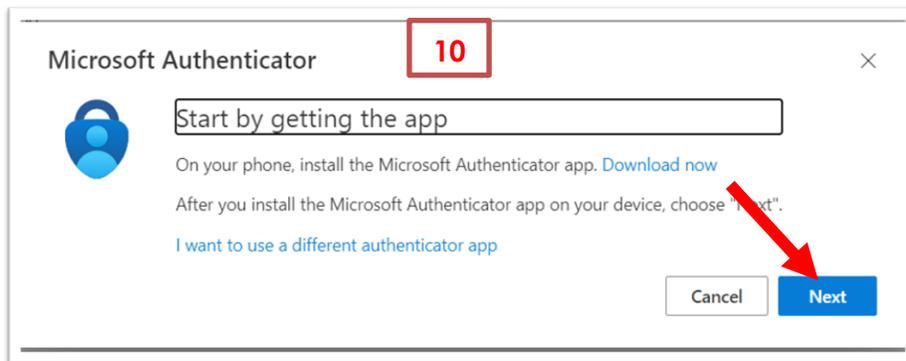
On your laptop/PC Refresh the page, then tap the "Add Sign-in Method button" on the aka.ms/mfasetup page opened earlier in the process



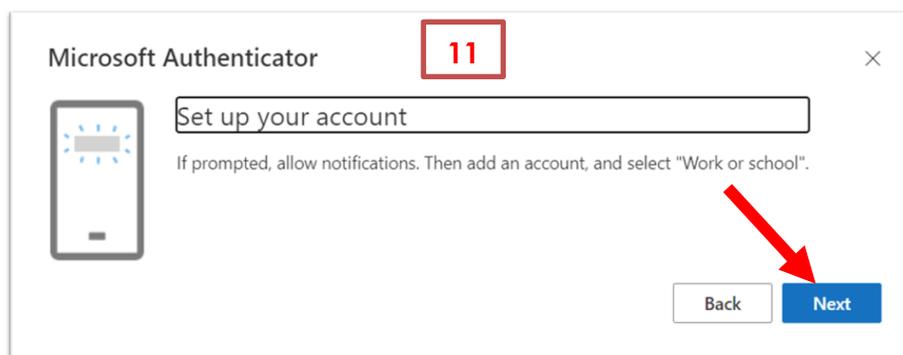
Click the drop-down menu and choose "Authenticator App"



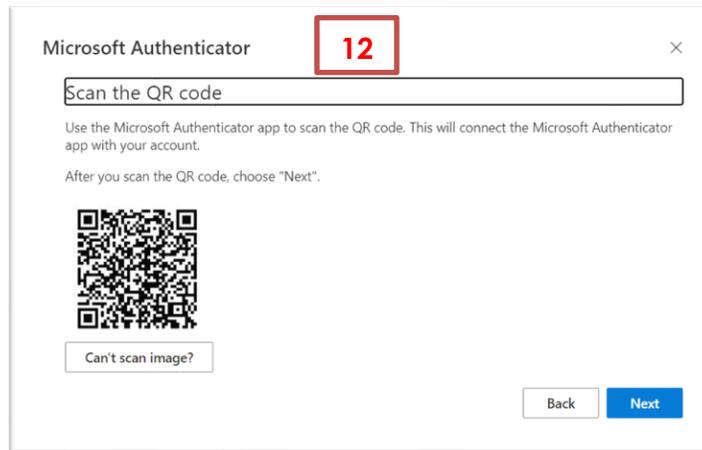
Click "Add"



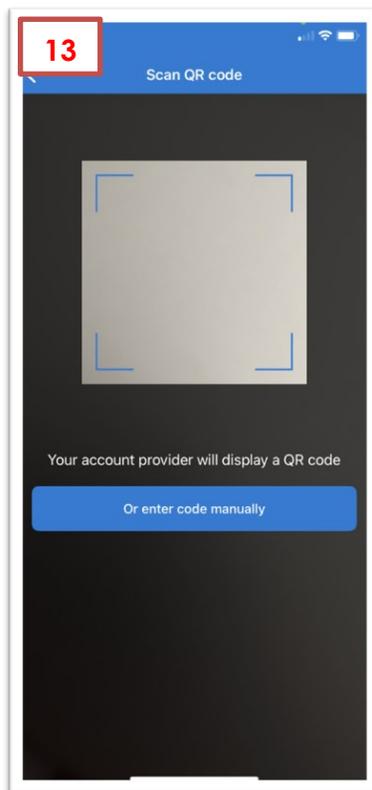
Click "Next"



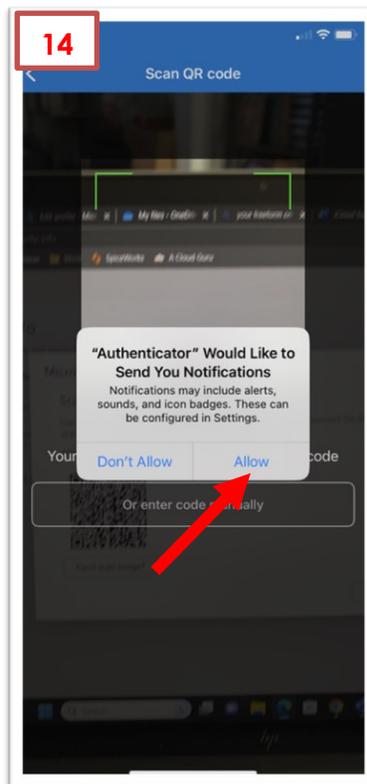
Click "Next"



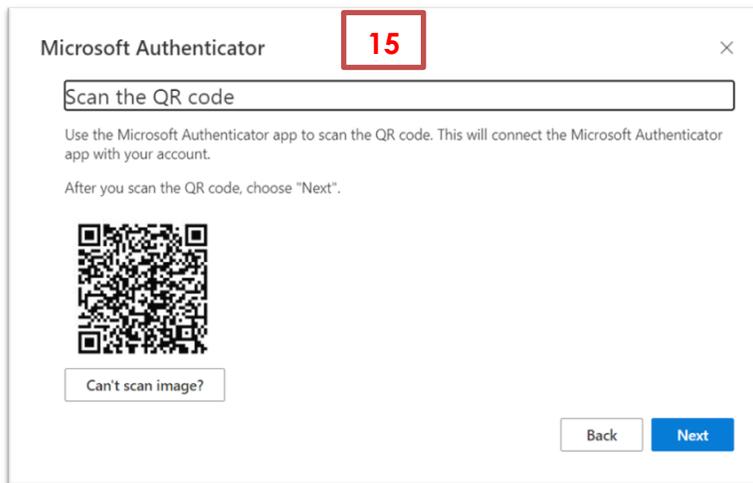
Have **this** screen ready to scan



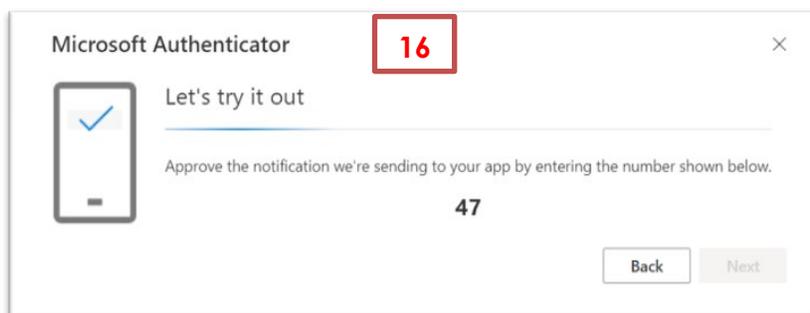
Scan the QR Code from
your Phone



Tap "Allow"

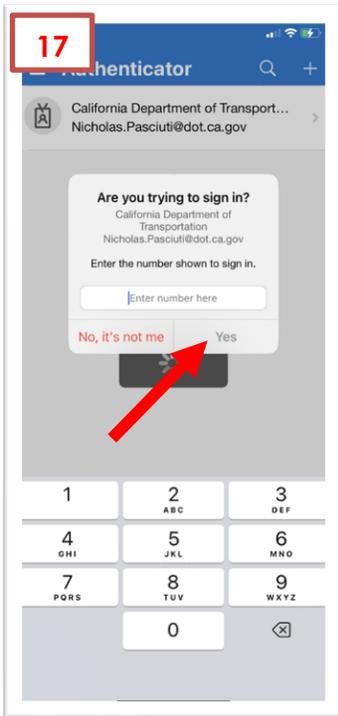


On your Laptop/PC Click "Next"

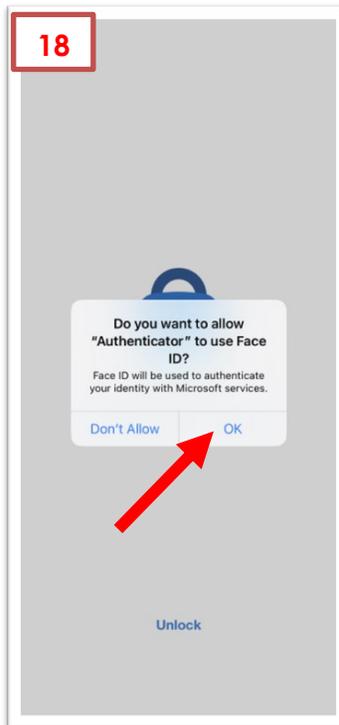


On your State Issued Laptop/PC

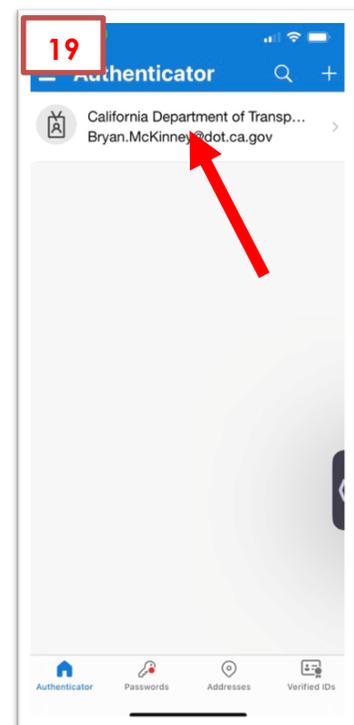
Note: the number after entering the number into the app you can click next to close this screen



**Enter the number and then tap "Yes"
Authenticator is now setup**



**If you have set up Face ID
tap "OK"**

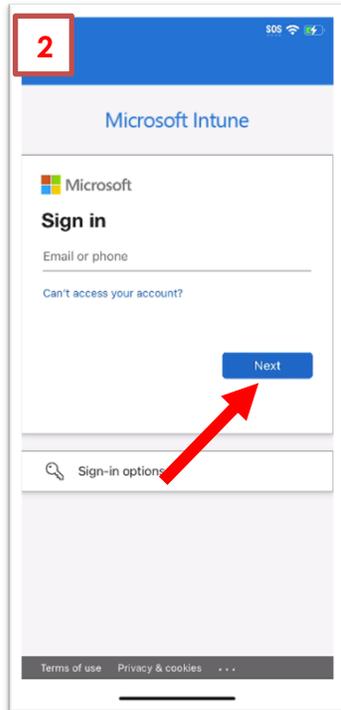


**If California Department of
Transportation appears,
Authenticator is set up**

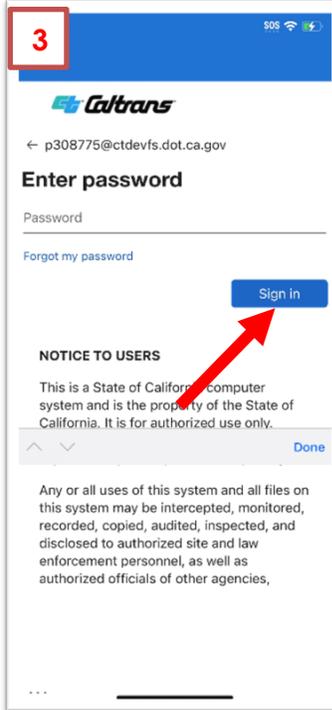
Enroll Device in Intune



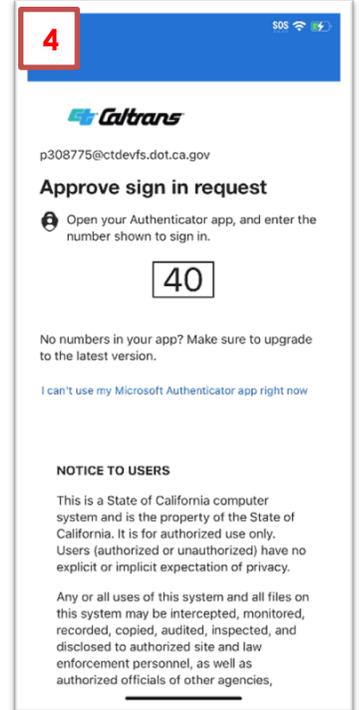
Open the Company Portal App



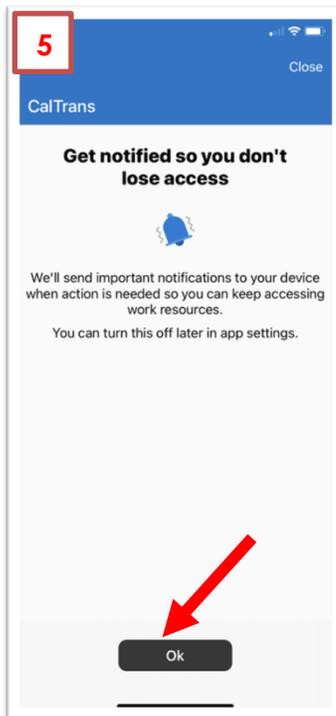
Enter your Caltrans email and tap "Next"



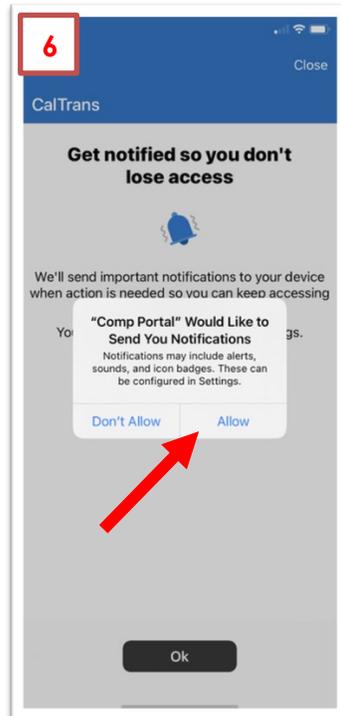
Enter your password and tap "Sign in"



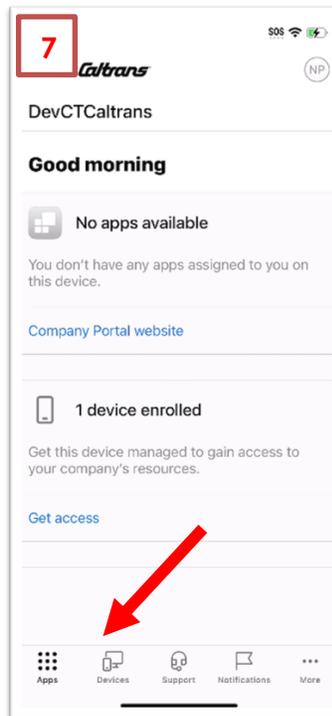
Complete the request for Authenticator as it appears



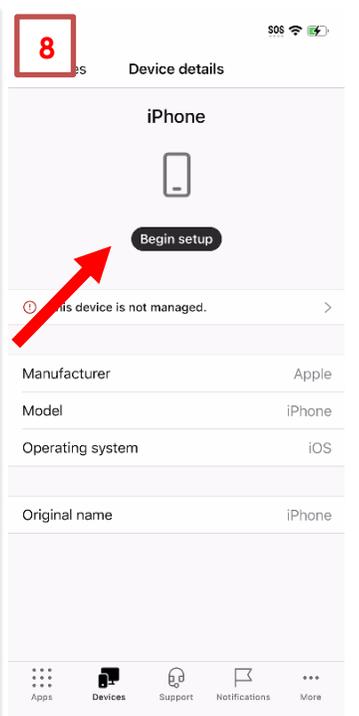
Tap "Ok"



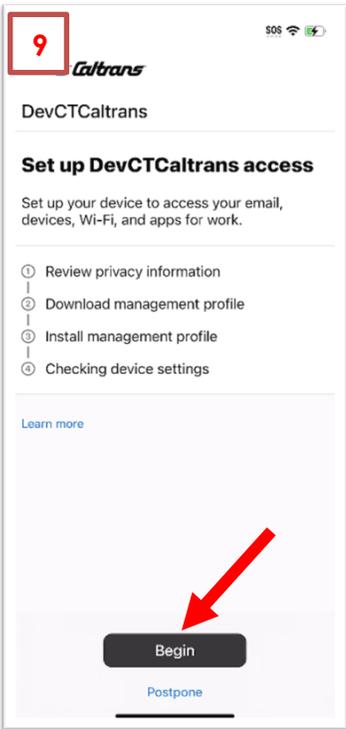
Tap "Allow"



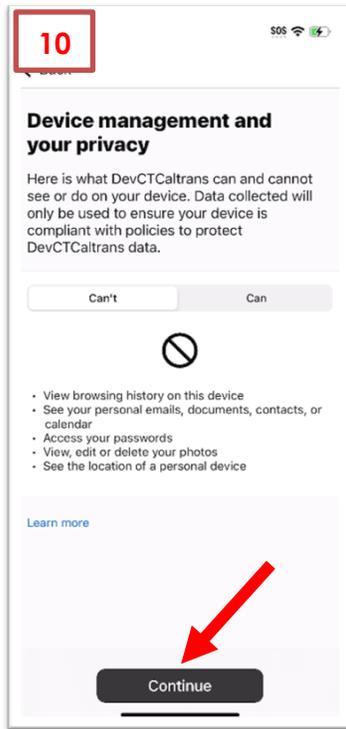
Tap "Devices"



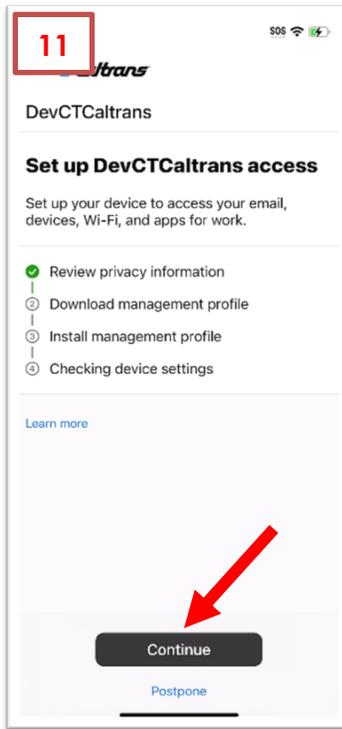
Tap "Begin setup"



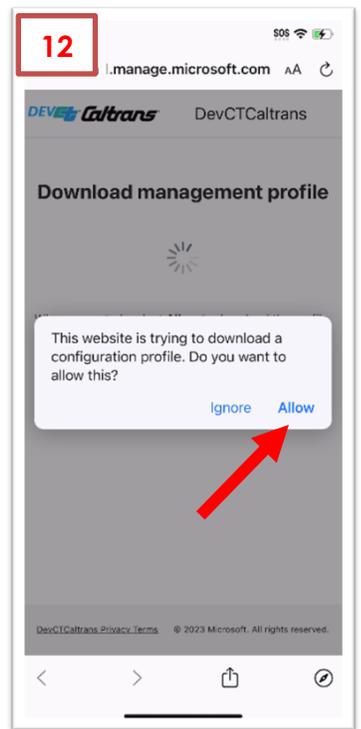
Tap "Begin"



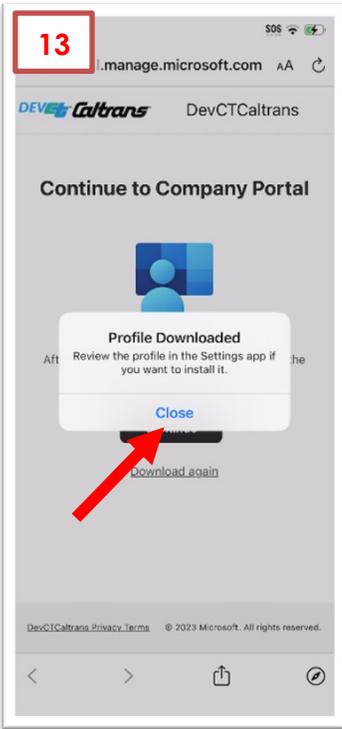
Tap "Continue"



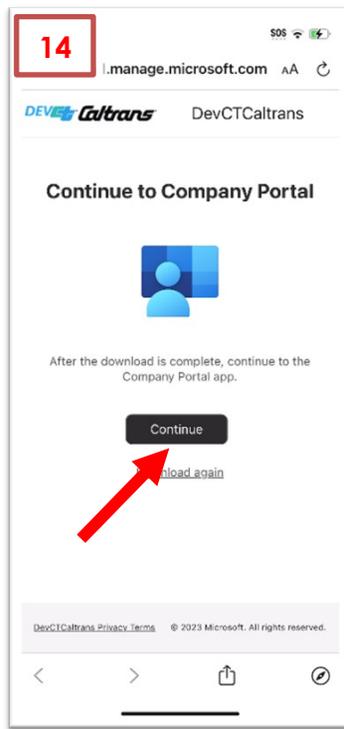
Tap "Continue"



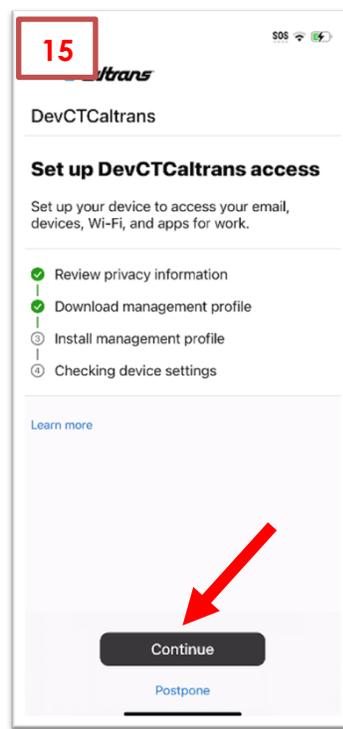
Tap "Allow"



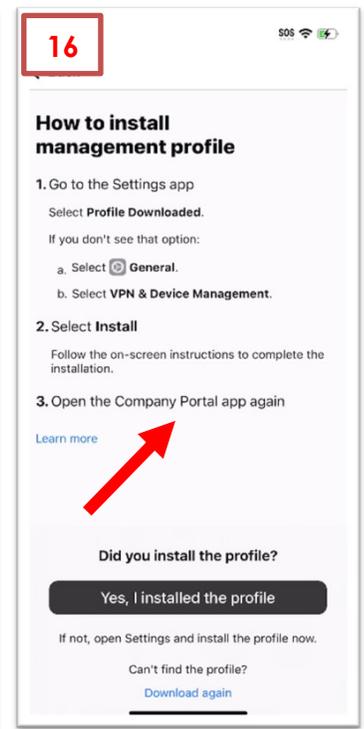
Tap "Close"



Tap "Continue"



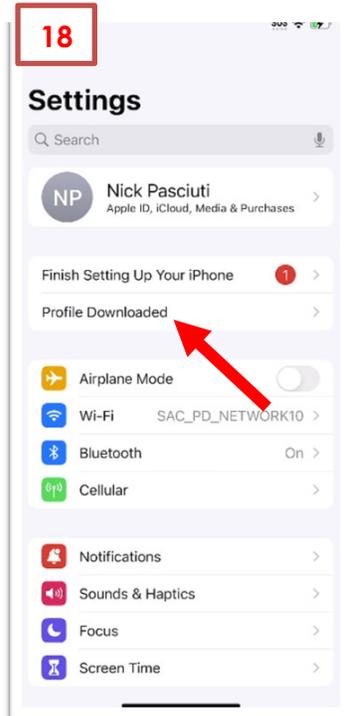
Tap "Continue"



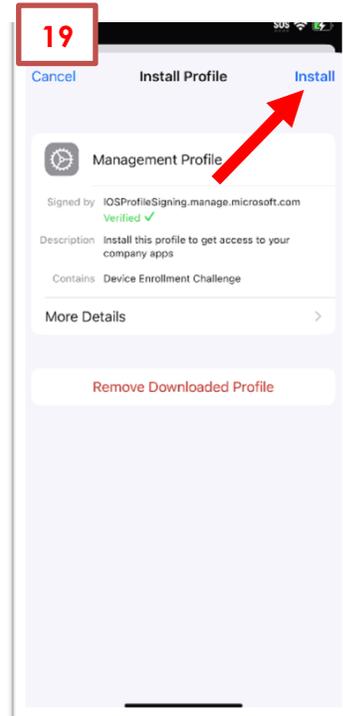
Take note of and follow the steps on screen



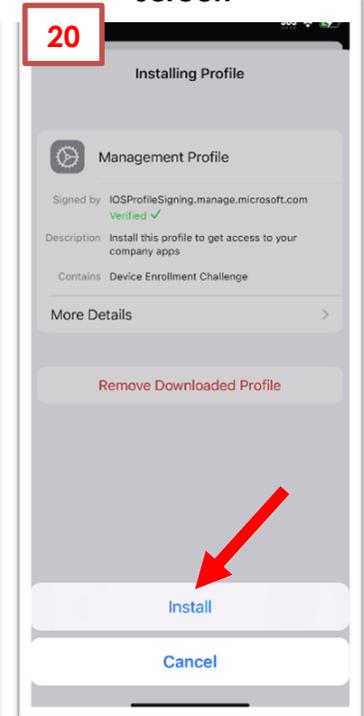
Open the settings app



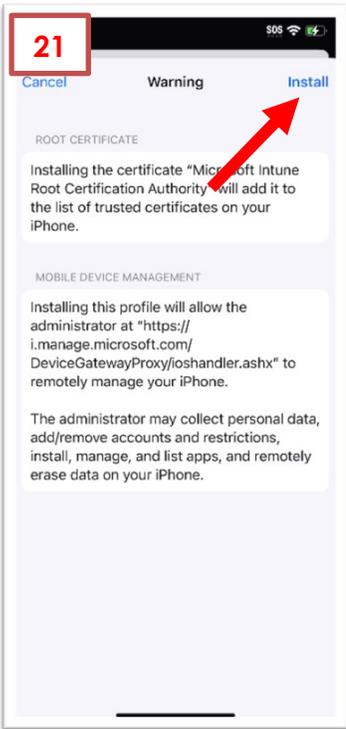
Tap "Profile Downloaded"



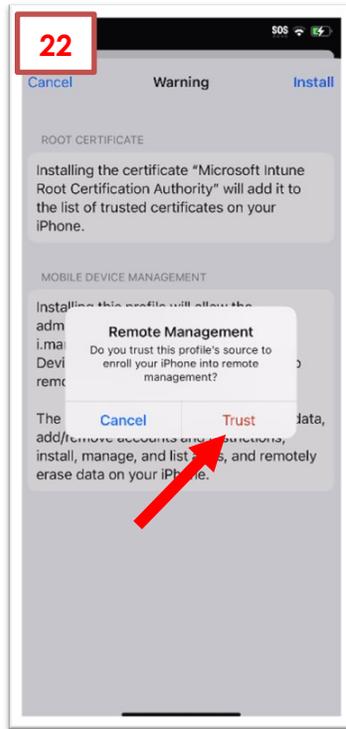
Tap "Install"



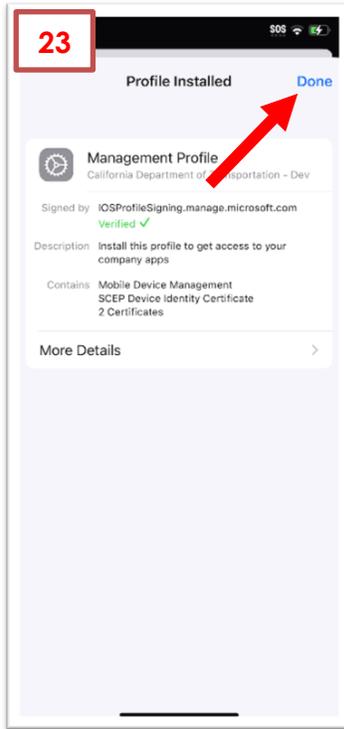
Tap "Install"



Tap "Install"



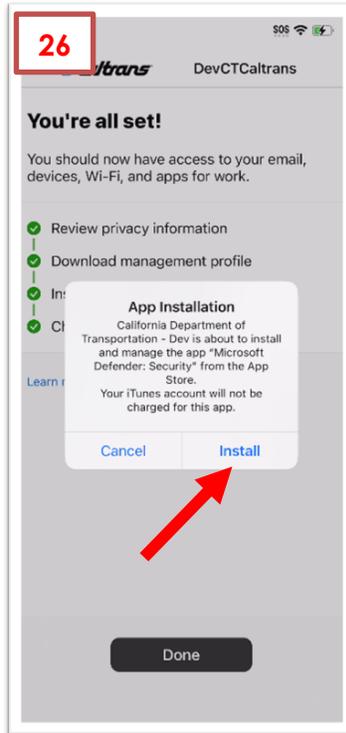
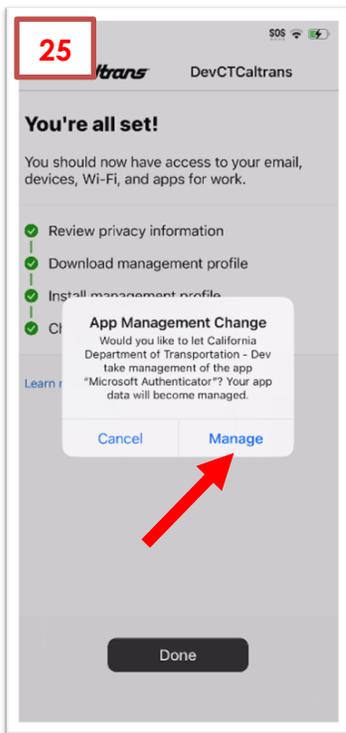
Tap "Trust"



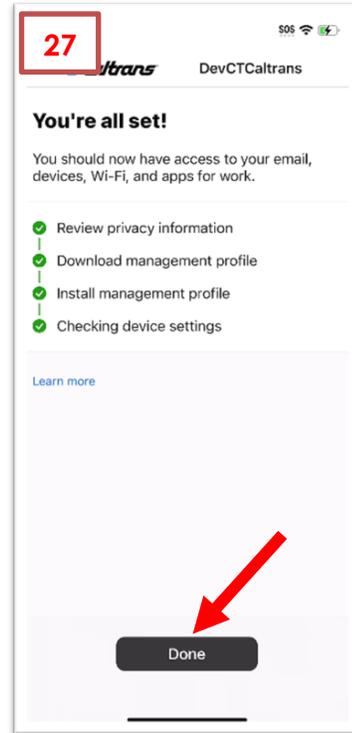
Tap "Done"



Close Settings and Open the Company Portal App

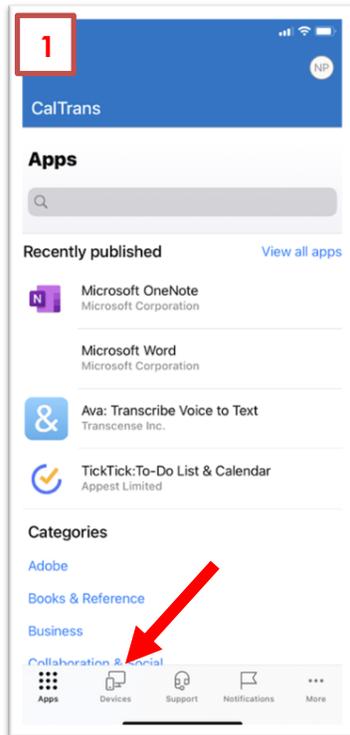


Once these prompts appear tap "Manage/Install" until all are gone

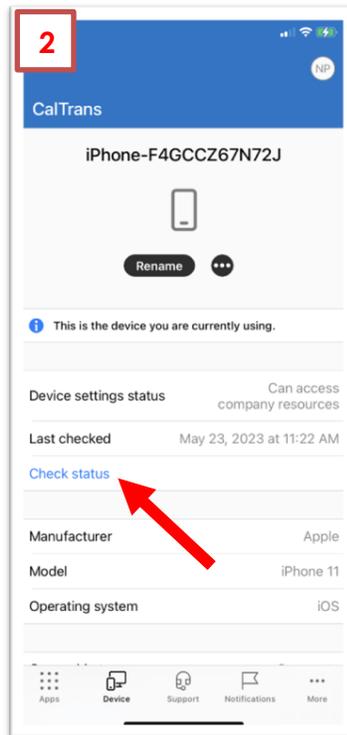


Tap "Done"

Company Portal – Sync your Device

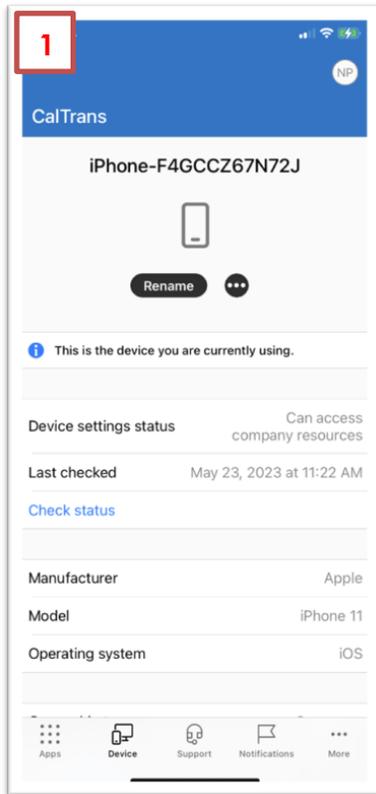


Tap "Devices"

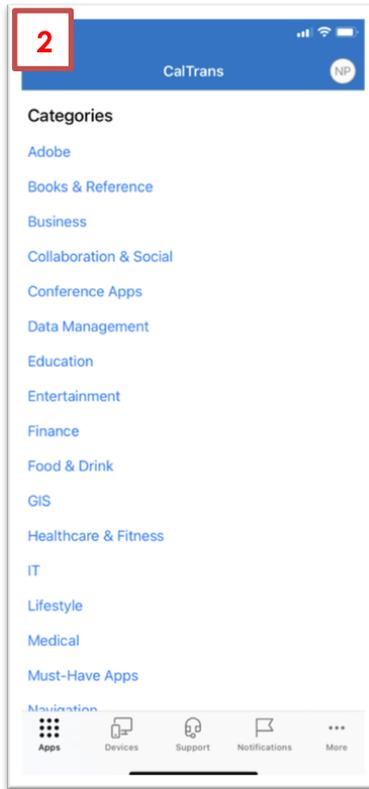


Tap "Check Status" and wait for Sync

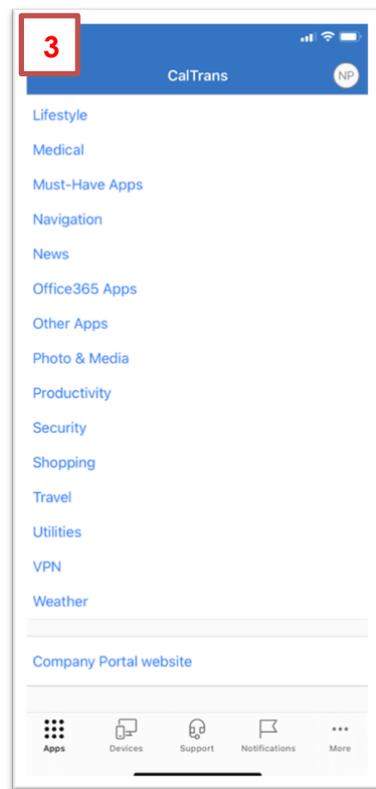
Company Portal – Verify Applications are available



Applications can be found via search



Or can be found through the app categories above



Setup Passcode

NOTE: The order and time boxed slides appear may vary with connection speed if they do not appear as shown move on and complete when they appear.

1 Tap "Dismiss"

2 If this prompt appears tap "Change Now"

3 Enter new passcode and tap "Continue"

4 Re-enter Passcode and tap "Set-passcode"

General Guidance

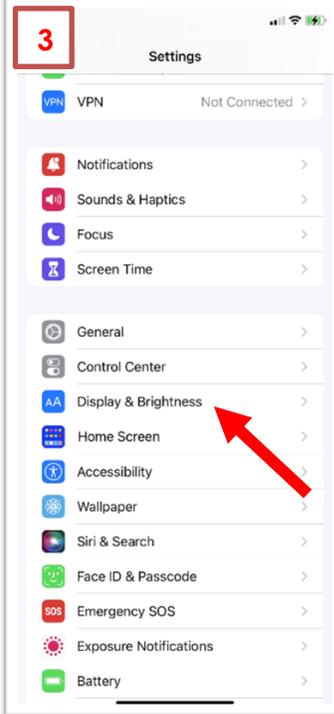
NOTE: Boxed Steps are Optional



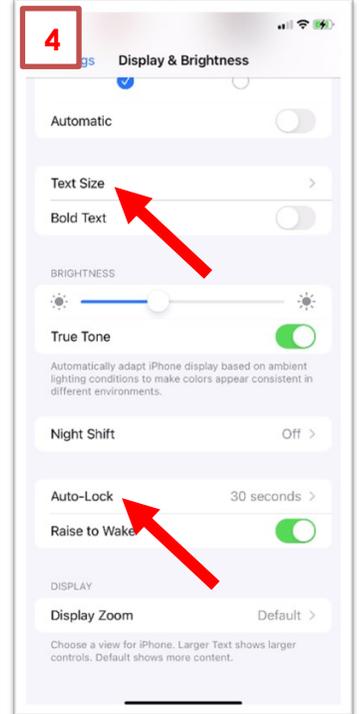
When this prompt appears tap "Cancel"



To change Text Size/Auto-Lock, Open the Settings App



Tap "Display & Brightness"



Edit "Text Size" and "Auto-Lock" as needed

Step 6: Configuring Applications

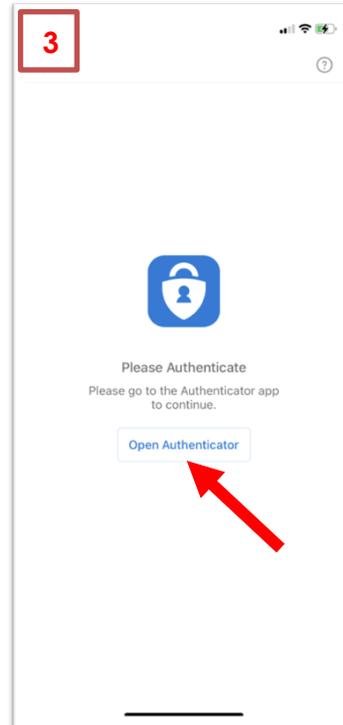
Access Email using Microsoft Outlook



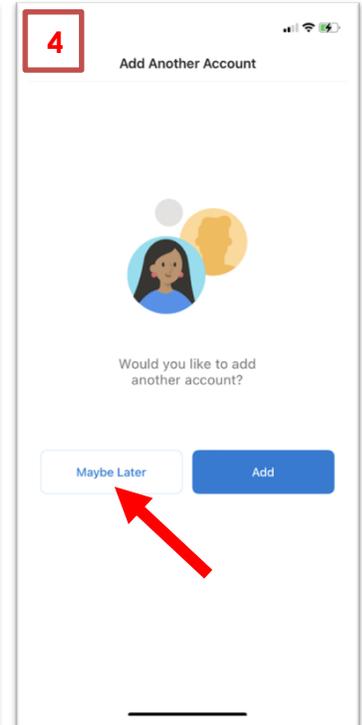
Open "Outlook"



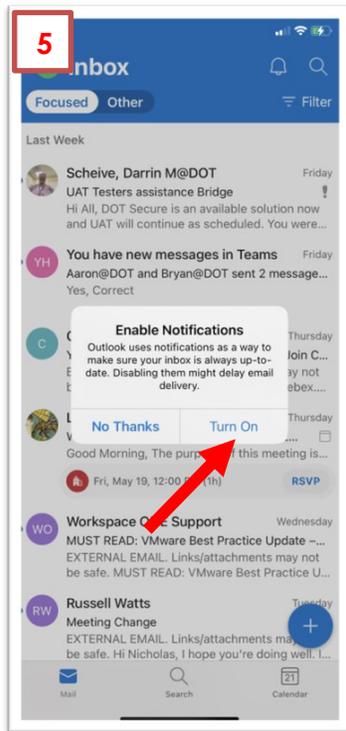
Tap "Add Account"



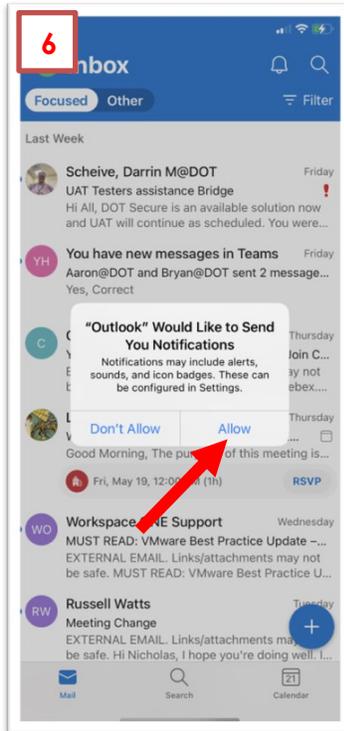
If this slide appears,
Tap "Open
Authenticator"



Tap "Maybe Later"



Tap "Turn On"



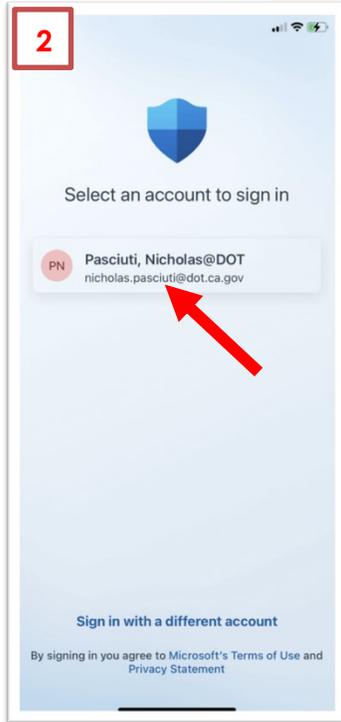
Tap "Allow"

Setup Microsoft Defender

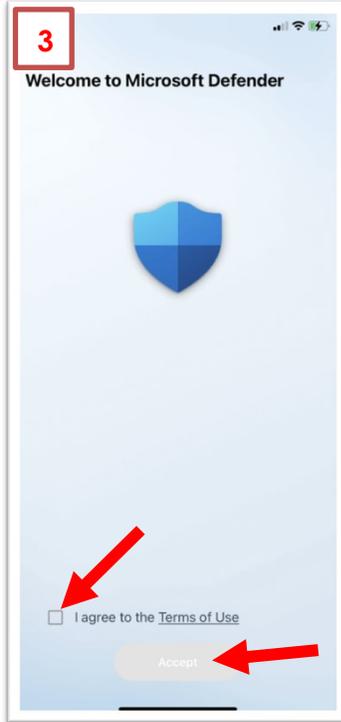
NOTE: Not Connected status is expected. This will update after Defender uses the VPN to access Caltrans resources such as Onramp.



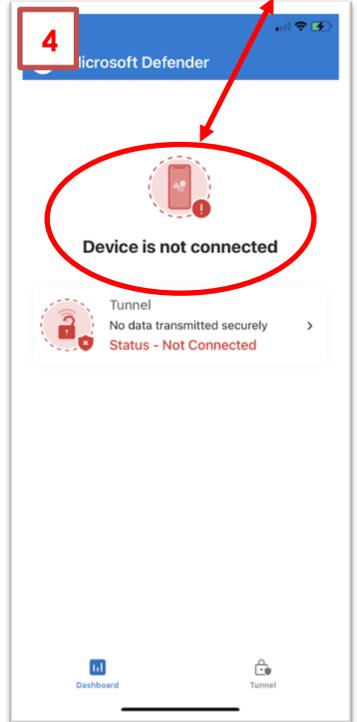
Open "MS Defender"



Tap on Your Account

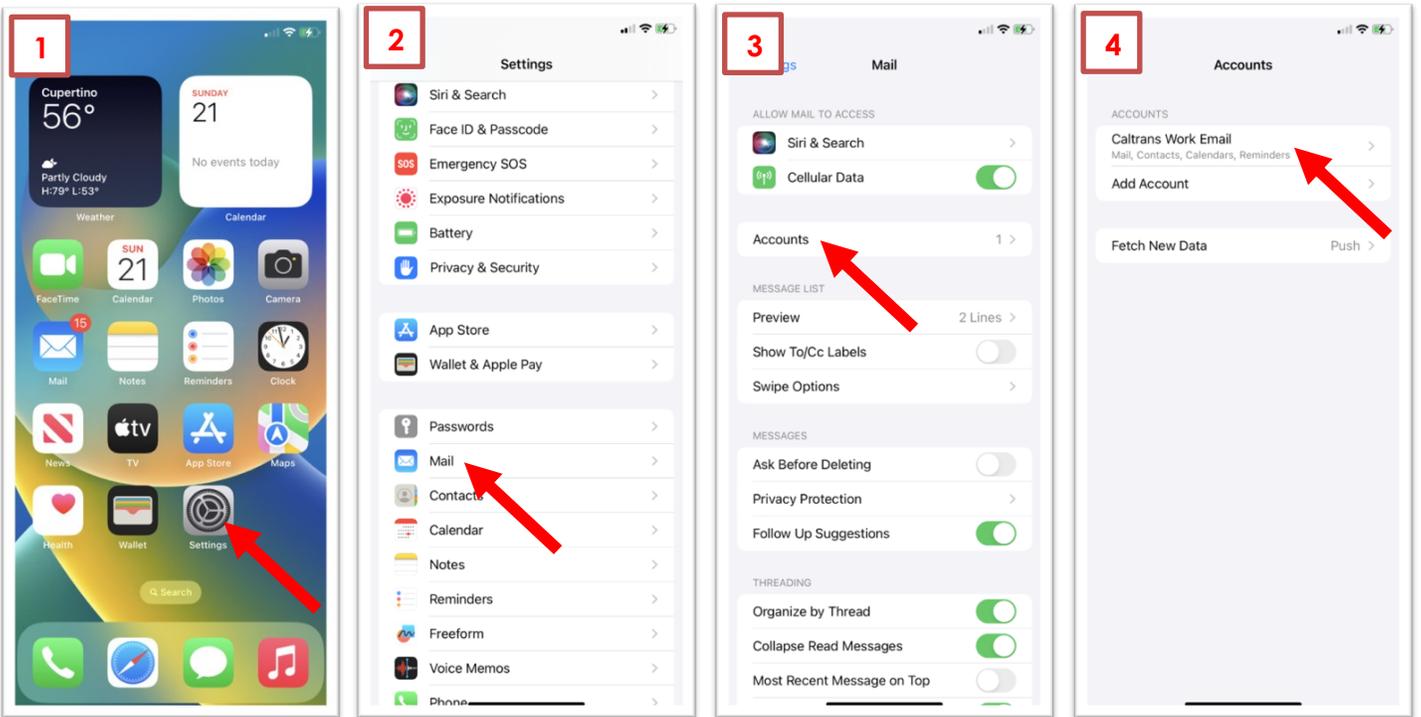


Check the box to agree to Terms of Use, tap "accept"

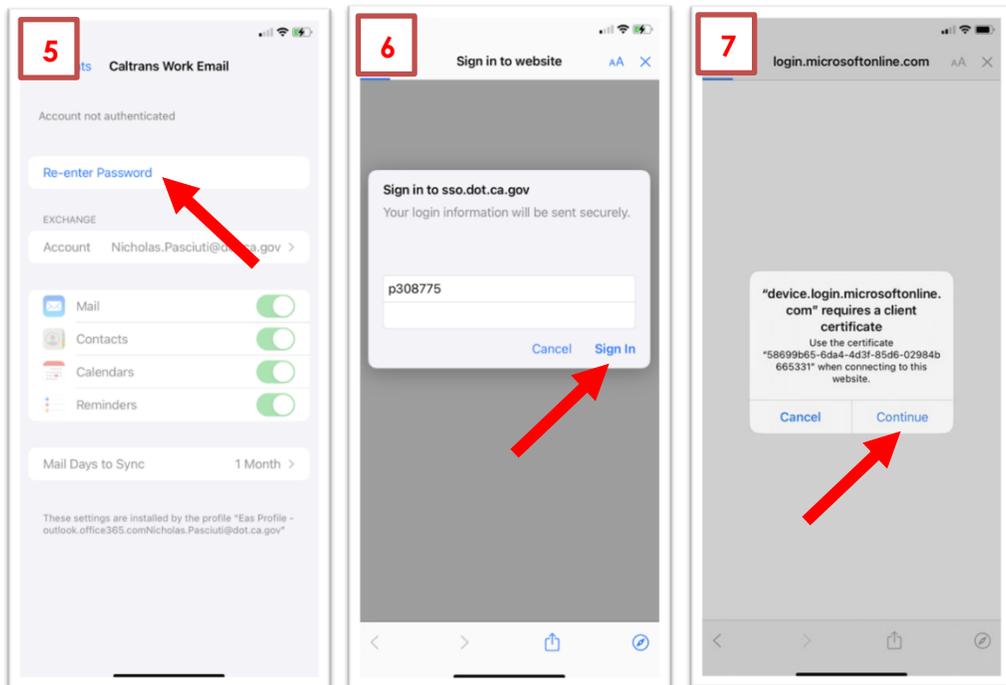


MS Defender is now setup

Access email using iOS Native Email App



Open Settings app Scroll down and tap "Mail" Tap "Accounts" Tap "Caltrans Work Email"



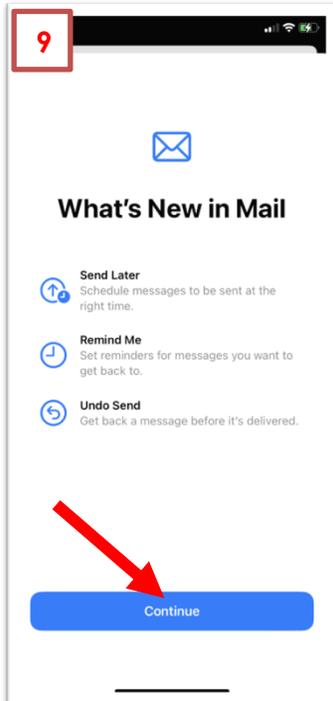
Tap "Re-enter Password"

Enter S-number/Email Address and Tap "Sign in"

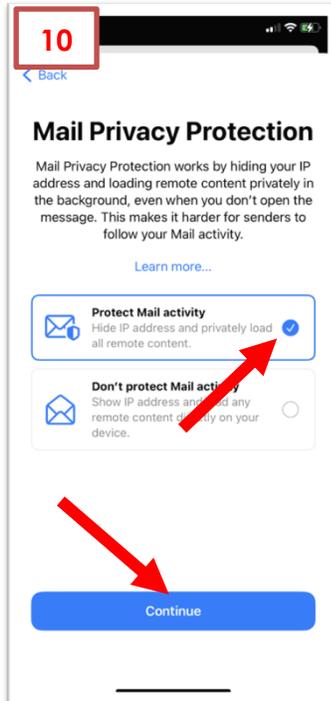
If this prompt appears, tap "Continue"



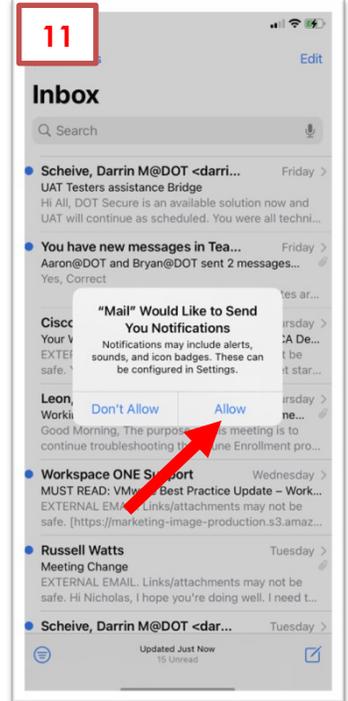
Open the native "Mail" app



Tap "Continue"



Select "Protect Mail activity" then tap "Continue"

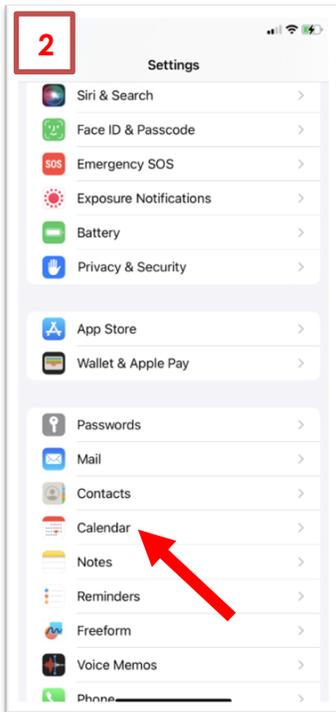


Tap "Allow"

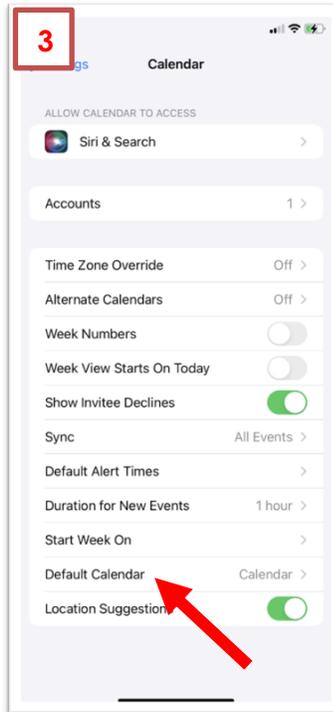
Set Default Calendar for Calendar App



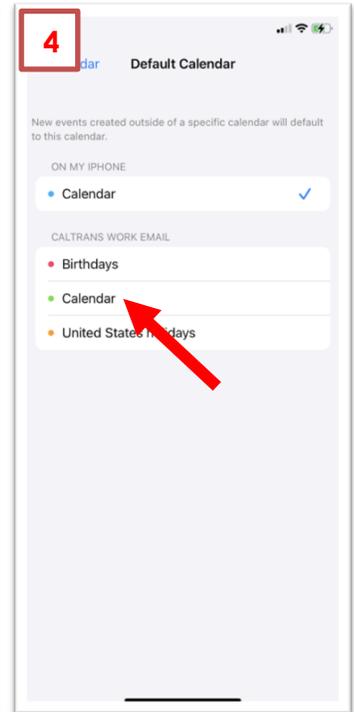
Open the "Settings" app



Scroll down and tap "Calendar"



Tap "Default Calendar"



Select the "Caltrans Work Email Calendar"

Set Photo Format to Most Compatible

This is an optional configuration if HEIC format is not desirable.

1 Open the "Settings" app

2 Scroll down and tap "Camera"

3 Tap "Formats"

4 Select "Most Compatible"



For further instruction, on how to download apps, reset your passcode, and access other required applications. Please refer to the [Caltrans – End User Guide – Microsoft Intune](#)