IT onboarding checklist | Workable

Use this checklist to organize effective IT onboarding sessions for your new hires:

Before your new hire’s first day

* Coordinate with the hiring manager and the HR department to collect information that will help you prep IT setup. Make sure you have new hires’:
  + Names
  + Contact details
  + Job titles
  + Departments
  + Starting dates
  + Software they’ll need for their jobs
* Order equipment new hires will need, including:
  + Laptop
  + Monitor
  + Mouse
  + Keyboard
  + Cables
  + USB sticks
  + Phone
* Determine which software, tools and access rights new hires need. This can include:
  + Company email
  + Internal messaging
  + Productivity tools (e.g. Trello, ToDoist, Asana)
  + Analytics (Tableau, Google Analytics)
  + Spreadsheets
* Get approval from the senior management team to set up new accounts.
* Invite new hires to join corporate accounts and send them setup guidelines.
* If applicable, contact new hires or their hiring managers to learn their preferred tech equipment.

On your new hire’s first day

* Prepare new hires’ desk with necessary hardware, like:
  + Computer
  + Phone
  + Printer
  + Notepads
  + Pens
  + Paper
* Schedule 1:1 meetings to help new hires properly:
  + Set up company accounts, if they haven’t already:
    - Email
    - Company messaging
    - Password security (e.g. LastPass)
  + Configure WLAN connection settings (computer and mobile)
  + Install anti-virus software
* Provide digital or physical copies of manuals for hardware and software so that new employees can reference them when needed.
* Explain how to use corporate office equipment, like:
  + Projectors
  + Video conference tools
  + Printers
  + Fax machines
* Ensure all new hires understand and sign data privacy agreements.
* Describe visitors policy.
* Train new hires on how to secure their workstations. For example, make sure they know:
  + How to store physical and digital files
  + How to share sensitive data
  + How to lock their computer and desk
* Explain how new hires should reach you if they have any technical issues. Include your:
  + Location
  + Email and phone
  + Username, if you communicate via a messaging application
  + Formal procedure to request technical assistance

During new employee’s first week or month

* Check in with new hires to see if they’ve properly installed all software.
* If necessary, schedule trainings on:
  + Security policies
  + Best practices when using office equipment
  + Productivity tips for commonly used tools
* Answer specific questions new hires may have after using tools for a while.
* Sign new hires up for routine security training exercises.