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.