



# WORKSMART®

## User Onboarding IT Checklist

### DATA COLLECTION FROM SUPERVISOR OR HR

Information needed to set up workstation and employee access

#### User Information:

- Employee name and job title
- Department and supervisor
- Office location
- Start Date

#### Systems & Data Access:

- Network access and permissions
- Data access and permissions
- Applications
- Remote (VPN) access

#### Equipment:

- Laptop or desktop
- Docking station for laptop
- Phone handset and headset
- Company-owned mobile device
- Printers, scanners
- Other items

#### Email:

- Access to shared mailboxes
- Access to employee's mailbox
- Access to former employee's mailbox
- Distribution groups
- Shared calendars

### IT CONFIGURATION

After hardware/software procurement or allocation

#### Set up accounts:

- Domain account (username and password) & permissions
- Applications (line-of-business, conferencing, internal collaboration, etc.)
- Email & distribution lists, additional mailboxes, shared calendars
- Phone number & voicemail
- Document credentials in password management tool

#### Set up computer

- Network shares
- Wireless
- Printers, scanners, fax,
- Microsoft Office
- Adobe Reader (or Acrobat)
- Configure Outlook
- Business applications
- Standard browser
- Internal communication tools
- Remote access
- Mobile device configuration

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## User Onboarding IT Checklist

### IT CONFIGURATION

After hardware/software procurement or allocation

#### Set up desk phone

- Assign phone number / extension
- Setup conference features
- Configure telephone handset

#### Set up workstation on desk

- Computer
- Monitor
- Keyboard / mouse
- Handset

### NEW HIRE TECH REVIEW

In-person meeting to help get them started

#### Review:

- Password management tool
- Wireless networks
- Security best practices (sharing sensitive data, password complexity, etc.)
- Office equipment (printers, fax, projectors, video conference tools)
- Internal collaboration tools
- 3rd party applications and any training/documentation
- How to contact technical support
- Email setup and best practices (email signature)
- Data storage and backups
- Remote access
- Follow up in one week to answer any questions

**Remember that personal connections matter.**  
Creating connections helps the new user feel supported.  
People come first, technology second!

