

New Employee Technology Set Up

When a new employee joins the organization, there is more to do than welcome them in and get the paperwork filled out. In a work environment where so many people work to some degree on a computer, have a phone and need access to specific technology or accounts, there is a degree of set-up that must happen before that person can begin to function in their job. If you have a very small organization, this may be a simple task but as you add new systems, it becomes a good idea to develop a checklist to make onboarding go smoothly.

This is a general list of questions/suggestions designed to help you create a checklist that is specific to your organization. It may also be a good idea to include with the checklist procedures for tasks that you may only do on the occasion of a new hire. At the end of this document, there is a sample of the checklist that the NH Center for Nonprofits uses.

Workstation

Account creation

- If you do not have a server, you may need to set up a username and password within the operating system.
- If you have an on-site server, the username and password are usually set there.
- If you have a cloud-based server like Google Apps or Office 365, you will need to log in as the administrator and create the account there.

Set up

- Log in as the new user on their workstation.
- Are there links to frequently accessed locations like a shared drive that you want to create a shortcut to?
- Are you running Outlook or another email client? Sign in.
 - Are there shared calendars to set up?
 - Set the sharing permissions for the user's calendar. Who can see it? Who can add things to it?
 - Are there shared contact lists to set up?
 - Make sure the address book points to the appropriate contact list
- Do you have scanning, fax or other software that needs to be set up for this user?



Phone

- If you have a phone system that has dial by name directory, you'll need to make that change.
- If the person's name displays on calls to other phones in the system, you'll need to change that.
- Will the person set up their own voice mail greeting, or will you? Are there instructions that you can give them?
- Do your phones have an insert to identify who is at which extension? Update that.

Database

- Will this person need access to data that you store in a database?
- What permissions should they have in the database? Read only, add, delete?

Online

- Do they need an account on your website?
- What are their permissions on the website? Can they add content, delete content?
- Are there other online accounts that they will need access to? Social Media, marketing, purchasing?

Miscellaneous

- Do you need to add the person's email to any distribution lists? All staff, program department, etc.
- Send an email out to all staff giving them the new user's email address.
- Email account considerations:
 - Does the user need permission to send mail on behalf of anyone else?
 - Do others need permission to send mail on the user's behalf?
- How will you communicate account information to the new user securely?

