

# 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 has to 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?



# New Employee Setup

(use for workstation changes also)

Name \_\_\_\_\_ Start Date: \_\_\_\_\_

Set up Network UserID/Password

Server (Active Directory User)

Office 365 User/email

Log in to both to test

Set up workstation

Add link to shared drive to  
desktop

Add as administrator \*

Add Shared Contacts to Address  
Book \*

Add Shared Calendars

Add to website

Create Drupal Account

Assign Permissions

Set as Center Staff in Civi

Get Photo

Phone

Set up Extension \*

Change Display Name \*

Email all staff with new email and phone extension.

Add to "Center Staff" Distribution  
Group

Set Calendar to Shared

Set up Sharp Scanner folder \*

Print Voice mail Set up  
Instructions

**Make sure Workstation  
is up to date**

- Browser versions
- Java
- Flash
- Adobe Reader

---

**|** \* Indicates instructions are provided