



IT Onboarding Checklist



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Preparation

- **Equipment Readiness**
Ensure all necessary hardware (laptops, desktops, monitors, peripherals) are available and tested.
- **Software Licenses**
Verify that all required software licenses are procured and ready for installation.
- **Access Permissions**
Confirm that access permissions for required systems and platforms are approved and ready for provisioning.

Hardware Setup

- **Workstation Setup:**
 1. Connect peripherals (monitor, keyboard, mouse).
 2. Set up docking stations (if applicable).
 3. Test hardware for functionality.
- **Network Configuration:**
 1. Connect the workstation to the network (wired/wireless).
 2. Ensure VPN setup if remote access is required.

Software Installation

- **Essential Software:**
 1. Install the operating system and ensure it is up-to-date.
 2. Productivity tools (e.g., Microsoft Office, Google Workspace).
 3. Communication software (e.g., Slack, Teams, Zoom).
 4. Specialized applications relevant to the role (e.g., Adobe Creative Suite, development tools).
- **Security Software:**
 1. Install antivirus and anti-malware software.
 2. Encrypt the hard drive if necessary.
 3. Install VPN software for remote access.

Account Provisioning

- **User Accounts:**
 1. Create email accounts.
 2. Set up network accounts.
 3. Provision access to cloud services (e.g., AWS, Azure).
 4. Grant access to internal databases and applications.
- **Multi-Factor Authentication (MFA):**
- Set up MFA for all critical systems.

Security Measures

- **Security Training:**
 1. Educate about password policies (e.g., complexity, expiration).
 2. Provide training on data protection practices.
 3. Raise awareness about cybersecurity hygiene (e.g., phishing, secure browsing).
- **Compliance Training:**
- Provide training on relevant compliance requirements (e.g., GDPR, HIPAA, CCPA).

Training and Onboarding Sessions

- **IT Orientation:**
 1. Schedule an IT orientation session to cover IT policies and procedures.
 2. Introduce available support resources and how to access them.
- **Role-Specific Training:**
- Provide training on specialized software/tools relevant to the employee's role.

Access and Permissions

- **Access Provisioning:**
 1. Ensure appropriate access to necessary systems, files, and resources.
 2. Adhere to the principle of least privilege.
- **Review Access:**
- Regularly review and update access permissions as needed.

Documentation and Resources

- **IT Documentation:**
 1. Provide access to IT documentation and knowledge base articles.
 2. Share guides on troubleshooting common issues.
- **Support Resources:**
 1. Provide contact information for IT support.
 2. Share links to online resources and FAQs.

Feedback and Follow-up

- **Solicit Feedback:**
 1. Collect feedback from the new employee about their IT onboarding experience.
 2. Address any issues or concerns promptly.
- **Continuous Improvement:**
 - Use feedback to improve the onboarding process for future employees.

Post-Onboarding Support

- **Ongoing IT Support:**
 - Offer continuous IT support as the new employee settles into their role.
 - Address any additional software or hardware needs that may arise.
- **Regular Check-ins:**
 - Schedule regular check-ins to ensure the new employee has all necessary IT resources and support.

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