# New Employee Workstation Setup

This new-employee workstation guideline steers network administrators through all of the phases of new-employee workstation setup. Setup tasks include (1) assessment of hardware, software, and network requirements, (2) acquisition of hardware and software, (3) installation and configuration of workstations, (4) environment testing, (5) workstation implementation, and (6) new employee training.

To do these tasks, network administrators must be familiar with the operating systems supporting our network. If you need assistance with a software installation procedure, refer to the appropriate software installation guide.

If you follow the tasks, outlined below, workstation setup will be a one-time instance. Keep the user away from the help desk. Set up the workstation correctly the first time. Have fun!

Note: Do not perform any workstation-setup tasks without an approved requisition form. Use our electronic purchasing approval system to obtain requisition approval. If you need help using the purchasing system, contact your immediate supervisor.

## Assessment of Hardware, Software, and Network Requirements

Identify and document all workstation requirements before any workstation setup begins. Use the Workstation Setup Assessment form to document all requirements. Blank assessment forms are accessible through our intranet in the \\Library\forms folder.

### Determine employee hardware and software requirements

Discuss hardware and software requirements with the new employee's departmental manager. If you have trouble assessing requirements, consult with your immediate supervisor.

Do not forget to document the following:

* Identify employee permissions, including (a) software, (b) workstations and servers, (c) devices, and (d) computer rooms.
* Note if the workstation setup is a clone of an existing one.
* Agree with the new employee's departmental manager on timeframes for completion of the project.
* List all hardware and software that you will need to purchase or lease.

### Confirm adequate network infrastructure for network expansion

Make sure your network infrastructure can accommodate the addition of another workstation. Cover the following points to ensure the new employee is equipped with the requested network access.

Cover the following questions in your infrastructure assessment.

* Remote access. Does the new employee need remote access peripherals?
* Phone line. Does the new employee need or have an internal/external phone line in his/her workstation area? Are phones in inventory? Is there an active phone connection in the workstation area?
* Network. If needed, can the network support additional ports on the available hubs/switches? Does the available network port work? Are CAT-5 cables in inventory?

## Acquisition of Hardware and Software

Make sure you purchase what is required. Get the specifications correct during the assessment. Whatever purchase method is used, shop and purchase wisely!

### Acquire hardware

If hardware acquisition is required, use our business partner, Dell. The web-based purchasing system is accessible at www.dell.com. If you do not have access to our online Dell account, contact your immediate supervisor.

### Acquire software

If software acquisition is required, use our vendor database to aid in vendor selection. We have credit accounts with all vendors in our vendor database. Our vendor database is accessible through our intranet in the \\Library\vendors folder. If you cannot access an account, contact your immediate supervisor.

Note: If no vendors in our database can meet the acquisition requirements, obtain three vendor bids and submit a bid fulfillment request to your immediate supervisor for review and vendor selection. Your supervisor will respond within 48 hours. If you need to fulfill an acquisition in less than 48 hours, indicate the turnaround time on your bid fulfillment request. Bid request forms are accessible through our intranet in the \\Library\forms folder.

## Installation and Configuration of Workstations

Based on the requirements found during the needs' assessment, install and configure the new employee's workstation. In addition, do it right the first time. If you have difficulty with any procedure, ask for help.

### Configure hardware

Make sure you have all hardware before you begin to configure it. If you have difficulty with a configuration, refer to the guide appropriate to the challenge at hand.

### Install software

Some software installations are based on prerequisite installation routines.

Note: Install unlisted software in any sequence.

## Environment Testing

Test all hardware and software before releasing the workstation to the new employee. Test, test, and retest. Test until all software and hardware are bug-free.

### Test hardware and software

Test all hardware devices such as floppy drives, DVDs, tape units, zip drives, modems, LAN connections, and remote access lines. Test all Software to make sure they load and execute.

Do not forget to test the following:

* Workstation access using the new employee's username and password combination
* Program logon and exit routines
* Basic operational functions as described in the operational guides

### Debug

If you find any problem, debug it. If you run into a problem you cannot resolve, ask for help. Ask coworkers, internal support desk staff, software support staff, and your immediate supervisor. Ask, ask, and ask! Whatever it takes, do not leave a problem unresolved.

## Workstation Implementation

Once all testing is successful, it is time to install the workstation. Again, make sure all hardware and software are working as expected.

### Set up the new employee’s work area

Arrange a convenient time to set up the workstation in the new employee's work area. Install network infrastructure, if needed, and install hardware.

Test all network-related functionality. Make sure you perform testing in the following environments and more, if needed:

* Network and remote access privileges
* Intranet and Internet accessibility
* Client/server applications

### Notify the new employee of usernames/passwords

Provide access codes to new employees in person. Make sure the new employee is aware of all assigned usernames and passwords, not just the operating system login code. Instruct the new employee to:

* Memorize the access codes.
* Never give out or write down access codes.
* Call the help desk to report forgotten access codes and user lockouts.

## New Employee Training

Conduct a training class with new employees to make sure they can operate the workstation. We provide basic training on operation of (a) off-the-shelf software packages, (b) operating system usage, and (c) hardware devices.

Note: The new employee's departmental manager arranges training classes outside of our training realm.

### Schedule a training class

A class must be set up ahead of time. You will be teaching the new employee basic hardware and software operation.

Follow the steps below when setting up a training class:

* Contact the new employee and schedule a training class.
* Inform the user of the 3-hour training window.
* Provide the new employee with the class location, date, and time.
* Give new employees a telephone number to call if they must reschedule the training class.

### Conduct a training class

Conduct the training class using (a) survey forms, (b) electronic quizzes, and (c) training outline guides. If you require assistance, consult with your immediate supervisor.

Use the following to get you through the class:

* Give the new employee a Software Survey form to select all software for which he/she has experience. The survey is accessible through our intranet in the \\Library\forms folder.
* Based on the software selected on the software survey, give the new employee electronic quizzes. The quizzes are accessible through our intranet in the \\Library\Quizzes folder.
* Note: The new employee takes quizzes on all software areas he/she checked on the software survey.
* Based on quiz results, administer a basic training class. Reference to the company training outline guides if you need guidance. The training outline guides are accessible through our intranet in the \\Library\Training folder.