

New Hire Training Checklist (name _____)

| Functions & Tasks | Responsibility | Assigned to | Status |
|--|----------------|-------------|--------|
| Administrative, Basic | | | |
| Make sure has RU or RM privileges on ARM. | RMD | | |
| Tour of EDC | RMD | | |
| Security | RMD | | |
| HR | RMD | | |
| Restrooms and access codes | RMD | | |
| Coffee machines and pantries/lunch rooms | RMD | | |
| Add to group email account (Help Desk) | MIS | | |
| Access to the Group Calendar | MIS | | |
| Administrative privileges to the FBTS | MIS | | |
| Access to Project Central Archive | MIS | | |
| Access the Compliance Dashboard (<i>Compliance may need to intervene</i>) | MIS | | |
| New ID Card; check that security includes access to the Records Management work area | Security | | |
| eTime (cloud) | Payroll | | |
| Employee Self Service (cloud) | Payroll | | |
| New employee orientation | HR | | |
| Benefits | HR | | |
| Administrative, Departmental | | | |
| Provide new employee with departmental policy and documentation (Training Syllabus, Principles, Patterns, SOPs, Terms & Definitions, Research Reference Sources) | RMD | | |
| Iron Mountain account login and password. | Iron Mountain | | |
| How to enter events on the Group Calendar. | RMD | | |
| How to sign up for TREND classes. | RMD | | |
| How to access publications library. | RMD | | |
| Autonomy Records Manager (ARM), part I | | | |
| How to enter boxes (create boxes, folders, projects, assign and change status; assign a location). | RMD | | |
| How to enter weekly production statistics into RMD tracking report. | RMD | | |
| How to add users. | RMD | | |
| How to update room information (includes Visual Directory | RMD | | |

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| and Project Central training). | | | |
| How to print out labels (and reload labels and ribbon into label printers). | RMD | | |
| Autonomy Records Manager (ARM), part II | | | |
| The Web Client: how to conduct searches and create reports of the search results. | RMD | | |
| The Web Client: how to access electronic documents. | RMD | | |
| Autonomy Records Manager (ARM), part III | | | |
| How to upload electronic documents, including quality control (includes Compliance DASH training). | RMD | | |
| Copying data from Legal Closing report to RMD tracking report, and following up with Bond Counsel firms. | RMD | | |
| Help Desk, part I | | | |
| The Help Desk schedule. | RMD | | |
| Pick-ups and Deliveries. | RMD | | |
| EDC Visual Directory. | RMD | | |
| Help Desk, part II | | | |
| File Box Tracking System: how to review submissions. | RMD | | |
| How to assign numbers. | RMD | | |
| How to reject boxes and request resubmission. | RMD | | |
| Help Desk, part III | | | |
| Standard Email Replies: how to respond to user requests. | RMD | | |
| Standard Email Replies: how to reply to box requests. | RMD | | |
| Help Desk, part IV | | | |
| How to deal with restricted access departments. | RMD | | |
| How to deal with litigations holds. | RMD | | |
| IM deliveries and where to place different types of boxes in 2 nd floor storage area. | RMD | | |
| How to operate portable bar code scanners. | RMD | | |
| Truck inspection. | RMD | | |
| Off-site storage, part I | | | |
| How to order boxes. | RMD | | |
| Off-site storage, part II | | | |
| How to place large orders or pickups. | RMD | | |
| How to check inventory at the warehouse. | RMD | | |

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|---|-----------------------|--------------------|---------------|
| How to order supplies | RMD | | |
| Circulation, part I | | | |
| How to review boxes. | RMD | | |
| How to notify users of missing folders. | RMD | | |
| How to circulate boxes on ARM (change status; change warehouse; change spaces). | RMD | | |
| How to review return boxes and return to warehouse. | RMD | | |
| Circulation, part II | | | |
| How to retrieve circulation information and how to send circulation reminder emails | RMD | | |
| Destruction, part I | | | |
| How to look up retention schedules. | RMD | | |
| How to update inventory data using patterns document. | RMD | | |
| How to review destruction eligible materials. | RMD | | |
| Destruction, part II | | | |
| How to look up Folder Event Dates for event-based retention rules. | RMD | | |
| How to compile review assignments. | RMD | | |