# New Hire Checklist

Name/Office/Title/Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| **How to Login** |  |
| Provide Password |  |
| **Intranet** |  |
| Employee Directory |  |
| PG, Dept, Committees |  |
| New Hire Diversity Video |  |
| HIPAA/HITECH Video |  |
| Launch List |  |
| Ethical Screens |  |
| Anatomy of a Large Claim |  |
| Cyber Security Policy / Phishing / DL Security Office |  |
| **LMS** |  |
| Log in |  |
| Searching for Courseware |  |
| Registering for Classes |  |
| Ask about adding to Training Department Newletter |  |
| **Outlook** |  |
| Verify Signature |  |
| Outlook Options |  |
| DL lists Review |  |
| Scheduling Meeting and Checking Availability |  |
| Retention Policy |  |
| Adding a Contact from email |  |
| Internal Email i.e. SMCGI |  |
| Secure Email |  |
| Metadata Assistant |  |
| **Mimecast** |  |
| Search |  |
| Spam Folder |  |
| How to Whitelist and Blacklist |  |
| **Word** |  |
| Paste Options |  |
| Format Painter |  |
| **Firm Ribbon** |  |
| Templates & Wizards |  |
| **Numbering Assistant** |  |
| Selecting a Style |  |
| Numbering a Document |  |
| Generating a TOC |  |
| Inserting Style Separator |  |
| **FileSite** |  |
| **Matter Centricity** |  |
| Interface – Checked Out Document, Worklist, My Matters |  |
| Personal Workspace |  |
| Workspace items – Saved Search, Tabs, Folders |  |
| Creating folders & tabs |  |
| Toolbar – Right to Left stop and EMM pieces |  |
| Adding a Workspace |  |
| Creating Sub folders |  |
| What is a Category |  |
| Document Searching |  |
| Right Click Menu |  |
| Document Properties |  |
| Document Security |  |
| Saving a Document |  |
| Save vs Save As |  |
| Emailing Attachments – Right Click, From Word, From Outlook |  |
| **EMM** |  |
| Email Retention Policy |  |
| Filing Toolbar |  |
| Filing Folders |  |
| Drag & Drop |  |
| **Phones** |  |
| How to Call Local & Long Distance |  |
| Transfer & Conference |  |
| Set up Voice Mail |  |
| Checking Voice Mail |  |
| Using the Directory |  |
| **Copiers** |  |
| Login |  |
| Copy |  |
| Scanning |  |
| **INTAPP TIME** |  |
| Login |  |
| Different Types of Time |  |
| Goal Tracker |  |
| Create an Entry |  |
| Edit old entries |  |
| Release |  |
| Grid Mode – Sort & Filter, Views, |  |
| Fix Spell Check |  |
| Timesaver |  |
| TImeBuilder – ATTY only Passive Activity Capture System |  |
| Mobile App – ATTY only – Help Desk |  |
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| **ATTY Only** |  |
| Finance Inquiry tool, allows to see client/matter billing information. Working Timekeeper Stats. Training Dept will follow up within 60 days for training. |  |
| **Remote Access – Access systems from outside the firm (limited by title)** |  |
| VPN (anyone with a firm issued laptop) |  |
| OWA (2 factor) |  |
| VDI (attorneys, paralegals, LAAs with temporary access at request of attorney, IS Staff, Marketing staff) |  |
| **Conferencing Platform** |  |
| Email and Welcome Packet |  |
| **SmartPhones** |  |
| Review Available Mobile Apps |  |
| **Paperless Proforma** |  |
| Schedule follow-up once proformas are generated |  |
| **Hourly Staff** |  |
| Time Clock |  |
| **Optional Software** |  |
| Workshare Compare |  |
| Adobe Acrobat |  |
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