Administrative Professional Checklist

This checklist will help guide you through the process joining your new team and office at JMU. Please note that not everything on this list will pertain to every administrative position.

FIRST WEEK

Meet with supervisor to review work hours, attendance expectations, submitting time off requests, answering office phone, etc.

Download Time and Attendance Record (current year) from HR website and save to desktop https://www.jmu.edu/humanresources/benefits/leave/time-attendance.shtml

Set voicemail greeting.

Meet team members and building coordinator (if applicable). Note their names, email, office locations and telephone numbers.

Review information on the Administrative Professional Welcome Program website.

Meet your housekeeper; get to know them on a first name basis. They are essential to the function of your building and you will rely on them for questions about trash, recycling, cleaning supplies, etc.

WHEN eID BECOMES AVAILABLE

Get JACard (with photo) from Card Services, located in the Student Success Center (SSC).

Pick up keys from Lock Shop (located in University Services Building). Your Building Coordinator must place the request. Your JACard and Work Order are required at pickup.

Complete Signature Authority for access to budget(s), org. codes, etc.

Sign into Outlook.

Set email signature.

Obtain access to calendars for team members you will support.

Request access to shared mailboxes that you will monitor. https://www.jmu.edu/computing/communication-and-collaboration/outlook-accessing-shared-mailbox-windows.shtml. You must first be granted permission by the owner of the mailbox.

Sign up in MyMadison for professional development through IT Training and Talent Development.

Add name/email address to office copier for printing/scanning.

Get access to N drive and SharePoint; a team member will put in a ticket with the IT help desk.

Take SPCC training and apply for card.

Log in to the JMU Zoom account; set name and picture.

Log in to the JMU Teams account; set name and picture.

Create Doodle, When Is Good, etc. account for assistance in scheduling meetings for large groups. You can also utilize Scheduling Assistant within Outlook.

Complete required Human Resources compliance training – https://www.jmu.edu/hrcompliance/index.shtml

FIRST MONTH

Pick up your SPCC.

Sign into Bank of America site and review reconciliation instructions.

Meet with supervisor for a thorough overview of your department's budget. Discuss annual and upcoming expenses, expectations, etc.

Create tracking system for all expenses (SPCC, departmental, foundation).

Order business cards from Madison Print Services.

Order a JMU name badge from Signs USA.

Set up Question Pro or Qualtrics account to send out surveys.

Take Chrome River Online Training (for processing travel approvals and reimbursements).

Take Cascade training (for website edits).

Consider joining networks (Safe Zone, etc.) or affinity groups (walking groups, tennis, crochet, new moms, etc.).

Consider/discuss with supervisor pursuing Administrative Assistant Certificate Program (AACP).

Consider a dining plan.

Explore LinkedIn Learning so you can take trainings that apply to your area.

Check out the JMU Libraries and all they have to offer: JMU Libraries and Staff Services

Check out University Recreation Facilities: UREC Orientation. Link for full-time faculty/staff memberships.

HELPFUL TIPS

Take lots of notes! You may do a task only once a month or once or twice a year. Make detailed notes on how you completed the task.

Create mailbox folders – lots of them. This will help you stay organized.

Create folders on your N drive – again, lots of them!

Keep a list of helpful people you meet and their areas of expertise. Call/email/message on Teams when you need assistance.

Keep all your training materials. You will reach for them often.