Administrative Professional Checklist

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

☐ Review information in AAASAC Welcome Packet.

☐ Request access to the Academic Resources Hub. Academic Resources, on behalf of all Academic Affairs departments, is involved with many of the processes that are managed by campus partners throughout JMU. This internal SharePoint site serves as an information and educational resource for administrative and fiscal staff across Academic Affairs, providing additional context and support for these processes.

When eID becomes available:

☐ Email ASACHelpLine@jmu.edu to receive these documents electronically with active links.

☐ Get JAC Card (with photo) – from Card Services (located in the Student Success Center (SSC).

☐ Pick up keys from Lock Shop (located in University Services Building) JAC Card and Work Order required at pickup; Building Coordinator must place the request.

☐ 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/email-faculty-staff-affiliate.shtml You must first be granted permission by the owner of the mailbox.

☐ Sign up for Trainings 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.

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

☐ 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 Everfi and Kognito training (in My Madison) – REQUIRED of all employees. https://www.jmu.edu/hrcompliance/index.shtml

First Month:

- ☐ Pick up your SPCC.
- ☐ Sign into Bank of America. 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 – take trainings that apply to your area.
- ☐ Check out the Libraries and all they have to offer – Rose Library on East Campus and Carrier Library on Main Campus JMU Libraries and Staff Services : JMU Libraries
- ☐ Check out University Recreation Facilities UREC Orientation   Link for into for full-time staff.

Helpful tips:

- • Take lots of notes! You may do a task only once a month or once or twice a year. For efficiency, take 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.