

Office Admin - 1st Month Objectives

Mentor's Name: _____ Employees Name: _____

Hire Date: _____ Title: _____

Training Requirement	Initials or (N/A)
Completed Office Tour	
Show employee locations of timeclocks and set up employee with timeclock use as needed	
Show employee location of all restrooms	
Show employee location of break room and supplies (tea, coffee, water, utensils etc.)	
Show employee the location of each department	
Show employee location of supplies room	
Show employee location of C train and which supplies are stored	
Show employee location of copy machines	
Show employee location of the yard (816 26 th street)	
Ability to Answer Phone Calls	
Train employee on MGE locations and contact info	
Train employee on employee directory/numbers	
Train employee on how to transfer calls	
Have employee demonstrate 3 transfer calls:	
Transfer 1:	
Transfer 2:	
Transfer 3:	
Train employee on customer service etiquette.	
Provide 3 scenarios of common customer interactions and have employee demonstrate customer service etiquette.	
Scenario 1:	
Scenario 2:	
Scenario 3:	
Train employee on taking messages and transferring information to necessary contact.	
Ability to Greet Persons Entering the Office	
Train employee on how to inquire about the nature of the persons visit	
Train employee on how to escort visiting persons to correct location.	
Provide 2 scenarios of visiting persons and have employee demonstrate ability to greet and direct persons.	
Scenario 1:	

Scenario 2:	
Completed Keycard Training	
Train employee on how to use a keycard and the times that their card will work.	
Completed Company Credit Card Training	
Train employee on what items can be purchased with the credit card	
Train employee on credit card policy	
Train employee on the process of submitting receipts to AP.	
Ability to Handle Mail	
Have employee join on the collection of mail to the post office, physical mailbox, and PO Box	
Train employee on how to sort/scan, email and hand-deliver mail to correct personnel by shadowing.	
Train employee on sorting and delivering faxes.	
Ability to Maintain a Clean and Safe Environment for Office Spaces	
Provide examples of common workplace hazards (leaks, appliances stop working)	
Train employee on the process of reporting workplace hazards	
Train employee of storage locations of safe work tools (step stool, dolly)	
Train employee on importance of ensuring clear walkways and how to remove hazards	
Train employee on common office hazards (extension cords, open drawers, trip hazards) and provide opportunity on communicating the hazard.	
Provide 3 hazard scenario examples and have employee demonstrate ability to locate and communicate.	
Scenario 1:	
Scenario 2:	
Scenario3:	
Train employee on different requirements for communicating adverse situations to employees. (Water off, bathroom not working, no hot water, ac/heat not working)	
Ability to Maintain Cleanliness of Building	
Train employee on which supplies and location to maintain bathroom supplies	
Train employee on requirements/schedule for wiping down bathroom mirrors and counters and kitchen counters.	
Train employee to refill supplies as required (soap, paper towels, toilet paper)	
Train employee on which supplies and location to maintain kitchen supplies.	
Ability to Manage Conference Rooms	
Train employee on how to located all resources of conference room materials/furniture	
Provide 2 examples of training room set ups.	
Set up 1:	
Set up 2:	

Ability to Order Office Supplies	
Train employee storage locations for supplies and how to maintain inventory levels.	
Train employee on how to set up new hire workstations	
Ability to Handle Driver Complaints	
Train employee of the driver complaint process.	
Have employee shadow 2 driver complaint processes.	
Complaint 1:	
Complaint 2:	
Ability to Assist Other Departments with Admin Tasks	
Train employee on process of obtaining signatures for vendor checks and when the signatures are necessary.	
Train employee on the process for folding, stuffing envelope, stamping and mailing vendor checks	
Train employee on the timing requirements for sending vendor checks.	
Ability to navigate Viewpoint	
Train employee on basic set up and location of different resources.	
Ability to navigate time clock punches and timesheets	
Train employee on the basic layout of time clock time punch requirements and timesheets.	
Ability to navigate Keystyle	
Train employee on how to access keystyle	
Train employee on how to approve invoices (if applicable)	
Train employee on how to run basic reports.	
Ability to locate resources in the MGE Portal	
Train employee on how to access and navigate the MGE portal	
Train employee on how to locate and save documents and forms	
Ability to locate resources in the One drive.	
Train employee on how to locate the One drive and what information can be found	
Ability to locate resources in SharePoint.	
Train employee on SharePoint and how to locate and store information	
Ability to navigate and locate resources in Teams	
Train employee on how to create and join calendar events in Teams	
Train employee on how to create a chat and video call in Teams	
Train employee on how to store and locate documents in Teams	
Ability to navigate Outlook	
Train employee how to locate personnel through Outlook	
Train employee on creating signature in Outlook	
Train employee on creating inbox folders and rules in Outlook	
Train employee on creating calendar events in Outlook	
Train employee on archiving and email management	
Ability to complete Weekly Safety Meetings	
Train employee on how to locate and complete weekly safety meetings and the requirement to complete them	
Ability to Update Employee information (I.E. Address, phone number etc.)	

Train employee on how to update employee information	
Ability to request time off/sick time	
Train employee on how to request time off/submit for sick time	
Ability to request resources (Keyboards, monitors, etc.)	
Train employee on how to request asset resources.	
Additional Training Provided:	
1.	
2.	
3.	
4.	
5.	