

# New Software Check-in Checklist

As soon as new software arrives, set aside enough time to complete all of the following steps:

- ☐ 1. Open the package, review the invoice and check off each item on the invoice that is present in the package. If an item is missing from the package but listed on the invoice, contact the company from which the items were ordered.
- ☐ 2. Record the date the package was received on the invoice.
- ☐ 3. Sign and print your name on the invoice.
- ☐ 4. Photocopy the invoice and file the copy in a fireproof, waterproof, lockable cabinet.

## **For each item received:**

- ☐ 1. Open each item.
- ☐ 2. Examine the software documentation.
- ☐ 3. Discard any unnecessary advertising materials.
- ☐ 4. Label the documentation with the software title name (if not present), date of receipt, and your name and signature.
- ☐ 5. File user manuals and documentation in a central location for user access.
- ☐ 6. Make photocopies of all proof of license documentation (End User License Agreements, License Certificates, Certificates of Ownership, receipt or invoices, etc.).
- ☐ 7. Flatten the product boxes.
- ☐ 8. Place the flattened product box and original documentation in a manila envelope. Label the envelope with the software title name, version, date of receipt, and your name and signature. Keep the documentation copies separate.
- ☐ 9. File the envelope in the fireproof, waterproof, lockable cabinet. Ideally this cabinet should be located off-site, or have limited access by specific employees.
- ☐ 10. File documentation copies in an accessible location to assist in software audits.
- ☐ 11. Update the software inventory database.
- ☐ 12. Verify that there is a backup copy of the software media in the backup storage area. This media should preferably be kept off-site.
- ☐ 13. Schedule the software installation with the requesting department. Provide the requesting department the copies of the software documentation.