

# IT Support Daily Checklist

The hallmark of good technology support involves routine. It is too easy to become enamored with technology for technology sake, making changes for personal preferences and other bureaucratic behaviors. This sample daily weekly checklist can assist you in making sure general maintenance activities are occurring regularly. Here are also some caveats.

Owners and managers can take this and share with their IT person and ask additional questions to create a dialog. Possible questions when discussing include:

- what tasks from list are they are doing today?
- what things do we do above the list?
- what are our most important assets?
- what other tasks are you doing unrelated to technology that I may not be aware of?

You might want to adjust the cycles or recurrence timing for you manpower and capabilities,

Some tasks might be automated with tools and should be stricken from list.

This is a partial list of activities that go into managing your technology. You will want to customize or add to this list for your specific environment and needs.

You might need to be more specific on events and certain tasks.

Routine maintenance requires discipline but is a key component of avoiding emergencies. You never have computer issues at a good time



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Date: \_\_\_\_\_ Assigned to: \_\_\_\_\_

DAILY/WEEKLY RITUALS		
Tasks	Complete?	Comments
Check servers for core four performance issues (CPU, memory, disk space, network)		
Check servers and services for availability (are domain controllers up, are mail servers/cloud email receiving properly, main application working)		
Check network devices for availability or performance issues (firewall, router, switches)		
Check Windows domain controllers for system log issues (restarts, stalled services, DHCP handing out addresses, Group Policy working, etc.)		
Check Windows domain controllers for security log issues (policy changes, intruder lockouts, unauthorized user creations)		
Check Windows application server application log issues (varies by application such as MS Exchange, MS SQL/MySQL, QuickBooks, Peachtree, other line of business applications)?		
Are remote access tools working for users (site to site connections working, remote laptops able to securely access files, terminal servers operational)?		
Check prior night's data back and make sure successful? Offsite a copy of backup data.		
Review security logs of key network elements for possible compromise or tuning (email filtering, web filtering, intrusion prevention systems, physical access).		
Disable employee accounts/email/permissions for separated team members		
Track all incoming user support requests and send notification of completion		
Update anti-virus signatures on all Windows and Mac devices on network		

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OTHER RECURRING TASKS				
Monthly Tasks	M1	M2	M3	Comments
Label new network equipment with hostname and IP address				
Conduct "amber walk" of technology areas, make sure no amber lights noting hardware issues for servers, switches, firewalls, wireless devices, UPS batteries, phone systems, ISP connections, etc.				
Review adequate UPS loads for desired runtime for power outages				
Test Windows patches on limited number of devices to check for potential issues from patching servers and workstations				
Deploy Windows patches to servers and workstations on network and reboot				
Test MS Office patches on limited number of devices to check for potential issues from patching workstations				
Deploy MS Office patches to workstations on network and reboot				
Inspect and audit Windows/MS Office patching for missing patches				
Review backup configuration to make sure desired servers and workstations being properly protected, adequate space to hold backup per retention cycle				
Organize operating systems (server, workstations) and application license keys and media of software for ongoing support				
Document new and changed network and system passwords for ongoing management				
Check for available anti-virus engine updates, download, update console and push out to users if needed				
Check firewall to make sure any licensed security features current and active				
Review outstanding tickets and projects to update progress				

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OTHER RECURRING TASKS					
Quarterly Tasks	Q1	Q2	Q3	Q4	Comments
Conduct server capacity trend analysis of core four resources to ensure adequate disk space, CPU, memory and network speed for key resources					
Meet with management team and discuss corporate goals, priorities and how technology is aligned with them (what new capabilities are possible)					
Rename and readdress devices to match corporate standard					
Audit disabled user accounts and archive off user email and data per IT policies (delete account when completed)					
Create configuration backups of devices such as firewall, switches, routers, wireless and other for quicker recovery in case of a failure					
Update firmware of devices such as firewall, switches, routers, wireless and other for security fixes, better stability and performance enhancements					
Semi-annual/Annual Tasks	Q1	Q2	Q3	Q4	Comments
Conduct backup testing- attempt test restore of select data to target location					
Review and update entire system documentation, password list, logical network map, special installation instructions					
Review major applications to consider for updating					
Create complete list of assets and review age for annual budgeting					
Pull previous year expenses and create budget for the year					
Evaluate security status and possible improvements for compliance					