

Every help desk should have a clearly defined process through which end users can request the purchase and installation of software and through which the IT department will complete that installation. A critical component of such a process should be either a paper or online form that the support department can use to ensure that all appropriate steps are taken prior to installation. To help you develop such a form for your help desk, we've created a sample software installation checklist based on a submission from TechRepublic member Julie O'Reilly.

Designed to be used alone or in conjunction with our [Software purchase/installation approval form](#), this software installation checklist tracks several important bits of information, including:

- Software type (new/existing)
- Availability of test sample of software
- Completion of software testing on standard client build
- Compatibility with standard client build
- Purchase order approval status
- Communication with requestor
- Posting of software to the network
- Assigning of installation ticket to filed tech
- Filing of forms

The purpose of this form is to aid the software request process. It should be attached to all request forms.

1. New software
 Existing software (see sub items)
 - License available (proceed to item 11)
 - License **NOT** available (proceed to item 7)

2. Software sample provided
 Software sample **NOT** provided (see sub items)
 - Sample attainable
 - Sample **NOT** attainable (proceed to item 7)

3. Test software on standard client build

4. Software compatible with standard load
 Software **NOT** compatible with standard load (see sub item)
 - Complete software incompatibility form (proceed to item 12)

5. Create installation guide

6. Communicate to requesting department (see sub items)
 - Approved (proceed to item 8)
 - NOT** approved (proceed to item 12)

7. Request purchase order

8. Purchase order approved by requesting department
 Purchase order **NOT** approved by requesting department (see sub item)
 - Fill out and attach Purchase Order Refusal form (proceed to item 12)

9. Post software to network (*For new software **only***)

10. Post software install guide and data sheet to network (*For new software **only***)

11. Assign ticket to installation tech

12. Close request—file ALL forms