Qoria

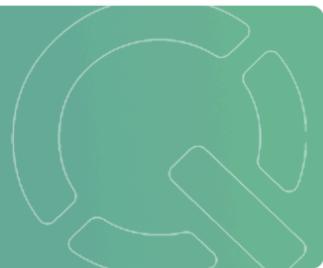| School/Organisation	
Name	Date

Note: This section is to be completed by an **IT Contact**.

1. Check all devices

Enter **N/A** under 'Done' if a checklist item is not applicable at your school.

#	What	Details	Done	Notes
1.1	Check for inactive Devices	Check the number of Devices in Monitor against the number of Devices you expect to see. Add the number of Devices running Monitor clients: **Devices not connected in over five days or sent data in over seven days** **+** **Devices not connected in over one day or sent data in over two days** **+** **Devices connected on the last day and sent data in the last two days.** Alternatively, you can multiply the number of full pages by 20 Devices, then add the number of Devices on the last page.	☐ Done ☐ N/A	

Qoria

#	What	Details	Done	Notes
1.2	Check if Monitor is monitoring devices	1. Select only **Devices not connected in over 5 days or sent data in over 7 days**. 2. Under **Status**, find devices that have been **offline for over five days** or **haven't sent data in over seven days**. 3. Check the **device name**, **serial number**, **operating system** of each missing or inactive device.	☐ Done ☐ N/A	
1.3	Remove unused Devices	1. Select the devices that don't need to be monitored (for example, library or laboratory devices). 2. Select **Remove Devices**.	☐ Done ☐ N/A	
1.4	Update devices to the latest version of Monitor	1. Filter the list by selecting **Devices are not on the latest version**. 2. Deselect all other filters. 3. Connect Devices running old versions of Monitor to your network and install the latest version of Monitor.	☐ Done ☐ N/A	

2. Check Contact Roles

Note: This section is to be completed by a **Safeguarding Contact**.

Select **N/A** if a checklist item is not applicable at your school.

#	What	Details	Done	Notes
2.1	Assign the Safeguarding Contact roles	Ensure Contacts are assigned the right contact roles: ● **Safeguarding Contacts** can assign Contact Roles, receive or investigate alerts, review Events, and manage Alerting Profiles ● **Limited Safeguarding Contacts** can receive notifications and phone calls from Moderators and view the Events for the students in their Alerting Profiles.	☐ Done ☐ N/A	
2.2	Check if Safeguarding and LImited Safeguarding Contacts' details are correct	Check that **Safeguarding** and **Limited Safeguarding Contacts** have updated or correct email and phone numbers. If needed, you can: ● Change their name, email or phone number. ● Change their Contact Role. ● Add or delete them as Safeguarding or Limited Safeguarding Contacts.	☐ Done ☐ N/A	
2.3	Check IT Contacts	Ensure users who need to install Monitor on devices, add or and manage other IT contacts are assigned as **IT Contacts**. Add or edit IT and Safeguarding Contacts if needed.	☐ Done ☐ N/A	

#	What	Details	Done	Notes
2.4	Check Reporting Contacts	Ensure users who only need summaries of Monitor activity are assigned as **Reporting Contacts**. Add or edit Reporting Contacts if needed.	☐ Done ☐ N/A	
2.5	Check Events	Investigate outstanding Events that occurred in the past year. Resolve and close Events before the new school year starts.	☐ Done ☐ N/A	
2.6	Check Email Alert Levels in Alerting Profiles	Ensure Email Alert Levels are appropriate to trigger notifications to the Safeguarding and Limited Safeguarding Contacts assigned to the profile. Set the Event Alert levels as necessary.	☐ Done ☐ N/A	
2.7	(UK schools only) Check the UK Integration Alert Levels in Alerting Profiles	If you are a school in the UK and have integrated Monitor with CPOMS, MyConcern or Record Manager, check the levels of the Integration Alerts are appropriate to log Monitor Events in your connected record keeping system. For more information: ● Troubleshooting CPOMS ● Troubleshooting Record Manager ● Set Monitor Event Alert levels	☐ Done ☐ N/A	

3. Check directories

This section is to be completed by a **Cloud/Tech Admin Contact**.

*Select **N/A** if a checklist item is not applicable at your school.

#	What	Details	Done	Notes
3.1	Check your synced directories	Check that you have all the Directories you need. Add or delete the Directories, as required.	☐ Done ☐ N/A	
3.2	Sync inactive directories	Manually sync Directories with last sync dates older than 7 days. Sync Monitor with Azure Directory Sync Monitor with Google Directory Sync Monitor with an on-premises Windows AD (No Smoothwall Appliance or Linewize Gateway) Contact the Monitor Support Team if you can't sync your directory.	☐ Done ☐ N/A	
3.3	Set up custom Alerting Profiles for certain groups	Where needed, identify or create groups needing specific monitoring. Create custom Alerting Profiles for these groups. Assign the responsible Safeguarding or Limited Safeguarding Contacts to the Alerting Profiles.	☐ Done ☐ N/A	

Qoria

#	What	Details	Done	Notes
3.4	Check your User Groups in the Admin Panel	Ensure the current Groups have the types of users needed for Alerting Profiles. Add new year Groups or new Groups. Inform the Groups of any changes to your Safeguarding Contact. Your Safeguarding Contact may need to update the Target Groups in their Alerting Profiles. Contact Monitor Support for further support when making changes to groups or directories.	☐ Done ☐ N/A	
3.5	Check your cloud integration	Configure your Microsoft 365 or Google Workspace integration for cloud or image scanning.	☐ Done ☐ N/A	
3.6	Manage cloud integrations	Edit, deactivate, or reactivate integrations as needed.	☐ Done ☐ N/A	

Additional information