

Monitor

Start of Year Maintenance Checklist



School / Organization

Name

Date



*Mark the action as “Not Applicable (N/A) if a checklist item doesn’t apply.

1. Check all devices

Note: This section is to be completed by a [Safeguarding Contact or IT Contact](#).

#	Action	Description	Done*	Notes
1.1	Check for inactive devices	<p>Check the number of Devices in Monitor against the number of Devices you expect to see.</p> <p>Sum the number of Devices running Monitor:</p> <ul style="list-style-type: none">• 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. <p>Alternatively, multiply the number of full pages by 20 Devices, then add the number of Devices on the last page.</p>		

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#	Action	Description	Done*	Notes
1.2	Check if Monitor is monitoring devices	<ol style="list-style-type: none">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, and operating system for each missing or inactive device.		
1.3	Remove unused devices	<ol style="list-style-type: none">1. Uninstall Monitor from relevant devices.2. Remove unmonitored devices from the Devices page by selecting Remove Devices.		
1.4	Update devices to the latest version of Monitor	<ol style="list-style-type: none">1. Filter the list by selecting Devices are not on the latest version.2. Clear all other filters.3. Connect Devices running older versions of Monitor to your network and install the latest version of Monitor.		

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2. Check Contact Roles

Note: This section is to be completed by a [Safeguarding Contact](#) in Monitor, or a [Monitor Admin](#) or [User Access Admin](#) in User Access Management.

#	Action	Description	Done*	Notes
2.1	Assign Safeguarding Contact roles	<ul style="list-style-type: none">• Safeguarding Contacts can assign Contact Roles, receive notifications and calls from Moderators, review all Events, and manage Alerting Profiles.• Limited Safeguarding Contacts can receive notifications and calls from Moderators and view Events for students in their Alerting Profiles.		
2.2	Check Safeguarding and Limited Safeguarding Contacts details	Check that Safeguarding and Limited Safeguarding Contacts have correct email and phone numbers. If needed, update the following: <ul style="list-style-type: none">• Name or phone number.• Contact Role.• Add or delete them as Safeguarding or Limited Safeguarding Contacts.		
2.3	Check IT Contacts	Ensure users who need to install Monitor on devices, add or manage other IT Contacts are assigned as IT Contacts . Add or edit IT Contacts if needed.		
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.		

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3. Check Event settings and Alerting Profiles

Note: This section is to be completed by a [Safeguarding Contact](#).

#	Action	Description	Done*	Notes
3.1	Check Events	<ol style="list-style-type: none">1. Investigate outstanding Events from the past year.2. Resolve and close Events before the new school year starts.		
3.2	Set up custom Alerting Profiles for certain groups	<ol style="list-style-type: none">1. Identify student groups that need different Monitor Alert settings. See Guidelines for Custom Alerting Profiles in Monitor for details.2. Ask your Directory Admin to create these groups.3. Create custom Alerting Profiles for these groups and assign the responsible Safeguarding Contacts.		
3.3	Check Email Alert Levels in Alerting Profiles	Ensure Email Alert Levels appropriately trigger notifications to the Safeguarding and Limited Safeguarding Contacts assigned to the profile. Set the Event Alert levels as necessary.		
3.4	(UK schools only) Check the UK Integration Alert Levels in Alerting Profiles	Check the levels of the Integration Alerts are appropriate to log Monitor Events in your connected record-keeping system. For more information: <ul style="list-style-type: none">• Troubleshooting Record Manager• Troubleshooting CPOMS• Set Monitor Event Alert levels		

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4. Check directories

Note: This section is to be completed by a [Directory Admin](#).

#	Action	Description	Done*	Notes
4.1	Check synced directories	1. Check that you have all the Directories you need. Add or delete the Directories, as required.		
4.2	Sync inactive directories	Manually sync Directories with last sync dates older than seven days. <ul style="list-style-type: none">• Sync Azure Directory• Sync Google Directory• Sync Windows AD		
4.3	Check User Groups in the Admin Panel	1. Ensure current Groups have the required user types for Alerting Profiles. 2. Add new year Groups or new Groups. Your Safeguarding Contact may need to update the Target Groups in their Alerting Profiles.		

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5. Check integrations

Note: This section is to be completed by an [Integration Admin](#).

#	Action	Description	Done*	Notes
5.1	Check cloud integration	Access the Admin Panel > Cloud Storage Integration page and set up the Cloud Scan integration for Microsoft or Google (if included in your licence package).		
5.2	Manage cloud integrations	Edit or turn integrations off or on as needed.		