

Organisation: _____ Date: _____

Name: _____

#	Action	Navigation	Description	Done	Not Required	Notes
1	Check your Devices 	Organisation > Devices	Check the number of Devices in Monitor against the number of Devices you expect to see. Get the <i>total number</i> of Devices running Monitor clients by adding Devices not connected in over 5 days or sent data in over 7 days + Devices not connected in over 1 day or sent data in over 2 days + Devices connected in the last day and sent data in the last 2 days Alternatively, get the <i>total number</i> of devices by multiplying the number of full pages by 20 Devices and adding the number of Devices on the last page.			

#	Action	Navigation	Description	Done	Not Required	Notes
2	Check if Monitor is monitoring Devices 	Devices > Devices not connected in over 5 days or sent data in over 7 days	Create a list of the Device Name/ Serial Number and the Operating System for missing Devices. Find Devices that have not come back online.			
3	Remove unused Devices 	Devices > Remove Devices	Remove any Devices that do not need to be monitored.			
4	Check if your devices are running the latest version of the Monitor client. 	Devices > Devices are not the latest version	Check if devices are running the latest Monitor Client. Connect Devices running old versions of Monitor Client to your network. Install the current Monitor Client.			

Additional information:

Need help?
[Monitor Support](#)



(Login required)

Organisation: _____ Date: _____

Name: _____

Note: This section is optional and only recommended for schools with Cloud/Tech Administrators.

#	Action	Navigation	Description	Done	Not Required	Notes
5	Check Contact Roles 	(Organisation Name > Edit	Users are the correct contact roles: <ul style="list-style-type: none"> • Users who need to receive alerts, investigate all Events, and manage Alerting Profiles are Safeguarding Contacts. • Users who need alerts for certain groups are Limited Safeguarding Contacts. 			
6	Check or manage Contacts 	(Organisation Name) > Edit > Safeguarding Contacts Limited Safeguarding Contacts	Verify users are listed who need access to: <ul style="list-style-type: none"> • check users and update phone numbers. • add users who need access. • remove users who do not need access. 			

#	Action	Navigation	Description	Done	Not Required	Notes
7	Check IT Contacts 	(Organisation Name) > Edit > IT Contacts	Verify users who need to install Monitor clients on users' Devices are IT Contacts.			
8	Check Reporting Contacts 	(Organisation Name) > Edit > Reporting Contacts	Verify users who only need summaries of Monitor activity are Reporting Contacts.			
9	Check for old Events 	Events	Investigate any Events that occurred after school ended. Resolve and close Events before the new school year starts.			

#	Action	Navigation	Description	Done	Not Required	Notes
10	Check Email Alert Levels in Alerting Profiles 	(Organisation Name) > Edit > Alerting Profiles > (open a profile) > Edit Profile	Check the Email Alert Levels are appropriate to trigger notifications to the Safeguarding and Limited Safeguarding Contacts assigned to the profile. Increase or decrease the Risk Level by Event Type (Risk Category) .			
11	Check UK Integration Alert Levels in Alerting Profiles 	(Organisation Name) > Edit > Alerting Profiles > (open a profile) > Edit Profile	If you are a UK School 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. More information: <ul style="list-style-type: none"> • Troubleshooting CPOMS • Troubleshooting Record Manager 			

Additional Information:

Need help?
[Monitor Support](#)



(Login required)

Organisation: _____

Date: _____

Name: _____

#	Action	Navigation	Description	Done	Not Required	Notes
12	Check your synced Directories 	Admin Panel > Directories	Check you have all of the Directories you need. Add Directories if you need to access the users. Delete Directories you do not need.			
13	Sync inactive Directories 	Admin Panel > Directories	Manually sync any Directories with a Last Sync date older than 7 days. Allow up to 2 hours to sync directories with large numbers of users. Continue to the next step if the sync is successful. If you get an error message, check the Domain. Contact the Monitor Support Team if you cannot sync your directory.			

#	Action	Navigation	Description	Done	Not Required	Notes
14	Check your Monitor Groups in Admin Panel 	Admin panel > Linewize Groups or Admin panel > Smoothwall Groups	Check the current Groups contain the types of users needed for Alerting Profiles. Add new year Groups or new logical Groups. Remove unneeded Groups. Communicate any changes to the Groups to your Safeguarding Contact. Your Safeguarding Contact may need to update the Target Groups in their Alerting Profiles.			
15	Check the Target Groups in Alerting Profiles 	(Organisation Name) > Edit > Alerting Profiles	Check all Target Groups are assigned to at least one Alerting Profile. Check the Safeguarding or Limited Safeguarding Contacts are assigned to the Target Groups they are responsible for.			

#	Action	Navigation	Description	Done	Not Required	Notes
16	Check your Monitor Groups in Admin Panel 	Admin panel > Linewize Groups or Admin panel > Smoothwall Groups	Check the current Groups contain the types of users needed for Alerting Profiles. Add new year Groups or new logical Groups. Remove unneeded Groups. Communicate any changes to the Groups to your Safeguarding Contact. Your Safeguarding Contact may need to update the Target Groups in their Alerting Profiles. Contact Monitor Support for changes to groups/directories			

Additional information:



Need help?
[Monitor Support](#)



(Login required)