# Monitor Start of Year Checklist

**Qoria**

| School/District: | |
|---|---|
| **Name:** | **Date:** |

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

Mark the action as **Not Required** if a checklist item is not used or applicable at your school.

| # | What | Navigation | Details | Done | Not Required | Notes |
|---|---|---|---|---|---|---|
| 1 | Check for inactive Devices | Devices > Devices not connected in over 5 days or sent data in over 7 days | Check the number of Devices in Monitor against the number of Devices you expect to see.<br><br>Get the total number of Devices running Monitor clients by adding:<br><br>Devices not connected in over five days or sent data in over seven days<br>+<br>Devices not connected in over one day or sent data in over two days<br>+<br>Devices connected on the last day and sent data in the last two days.<br><br>Alternatively, get the total number of devices by multiplying the number of full pages by 20 Devices and adding the number of Devices on the last page. | | | |

| # | What | Navigation | Details | 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 missing devices, including the **device name**, **serial number**, and the **operating system** of each missing device.<br><br>Find devices that have not come back online in over five days or sent data in over seven days. | | | |
| 3 | Remove unused Devices | Devices > Remove Devices | Remove devices that don't need to be monitored. | | | |
| 4 | Check the Monitor version | Devices > Devices are not the latest version | Check if devices are running the latest version of the Monitor client.<br><br>Connect Devices running old versions of Monitor Client to your network and install the latest Monitor client. | | | |

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

*Mark the action as **Not Required** if a checklist item is not used or applicable at your school.

| # | What | Navigation | Details | Done | Not Required* | Notes |
|---|------|-----------|---------|------|---------------|-------|
| 5 | Check Contact Roles | Organizations > Organisation > Edit | Check that users have the correct contact roles:<br>● Users who need to receive alerts, investigate Events, and manage Alerting Profiles are **Safeguarding Contacts**.<br>● Users who need alerts for specific groups are **Limited Safeguarding Contacts**. | | | |

| # | What | Navigation | Details | Done | Not Required* | Notes |
|---|------|-----------|---------|------|---------------|-------|
| 6 | Check or manage Safeguarding Contacts or Limited Safeguarding Contacts | Organizations > Your Organization > Edit > <br><br>Safeguarding Contacts <br><br>or <br><br>Limited Safeguarding Contacts | Check that **Safeguarding** and **Limited Safeguarding Contacts** have updated or correct email and phone numbers. If needed, you can: <br><br>• Change their name, email or phone number. <br>• Change their Contact Role. <br>• Add or delete them as Safeguarding or Limited Safeguarding Contacts. | | | |
| 7 | Check IT Contacts | Organizations > Your Organization > Edit > IT Contacts | Ensure users who need to install Monitor clients on devices, view alerting profiles, and manage other IT contacts are **IT Contacts**. <br><br>Add or edit IT contacts if needed. | | | |
| 8 | Check Reporting Contacts | Organizations > Your Organization > Edit > Reporting Contacts | Verify users who only need summaries of Monitor activity are Reporting Contacts. <br><br>Add or edit Reporting Contacts if needed. | | | |
| 9 | Check Events | Organizations > Your Organization > Events | Investigate any Events that occurred in the past year. <br><br>Resolve and close Events before the new school year starts. | | | |
| 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 | | | |

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|---|------|------------|---------|------|---------------|-------|
|  |  |  | Limited Safeguarding Contacts assigned to the profile.<br><br>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.<br><br>More information:<br><br>● Troubleshooting CPOMS<br><br>● Troubleshooting Record Manager |  |  |  |

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

*Mark the action as **Not Required** if a checklist item is not used or applicable at your school.

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|---|------|------------|---------|------|---------------|-------|
| 12 | Check your synced directories | Smoothwall/Linewize Portal > Admin Panel > Directories | Check that you have all of the Directories you need. Add or delete the Directories, as required. |  |  |  |

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|---|------|-----------|---------|------|---------------|-------|
| 13 | Sync inactive directories | Smoothwall/Linewize Portal > Admin Panel > Directories | Manually sync Directories with last sync dates older than 7 days.<br><br>Sync Monitor with Azure Directory<br><br>Sync Monitor with Google Directory<br><br>Sync Monitor with an on-premises Windows AD (No Smoothwall Appliance or Linewize Gateway)<br><br>Contact the Monitor Support Team if you can't sync your directory. | | | |
| 15 | Check the Target Groups in Alerting Profiles | Organizations > Your Organization > Edit > Alerting Profiles | Check that all Target Groups are assigned to at least one Alerting Profile.<br><br>Check if the Safeguarding or Limited Safeguarding Contacts are assigned to the Target Groups for which they are responsible. | | | |
| 16 | Check your Monitor Groups in the Admin Panel | Admin Panel > Smoothwall/Linewize Groups | Check the current Groups have the types of users needed for Alerting Profiles.<br><br>Add new year Groups or new logical Groups.<br><br>Inform the Groups of any changes to your Safeguarding Contact. Your Safeguarding Contact may need to update the Target Groups in their Alerting Profiles.<br><br>Contact Monitor Support for changes to groups/directories | | | |

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|---|------|-----------|---------|------|---------------|-------|
| 17 | Check your Cloud Scan integration | Admin Panel > Cloud Scan > Integration | Check that your Microsoft 365 or Google Workspace integration is working. | | | |
| 18 | Manage cloud integrations | Admin Panel > Cloud Scan > Integration | Edit, deactivate, or reactivate integrations as needed. | | | |

## Additional information