

School/District: _____ Date: _____

Name: _____

* Mark the action as Not Required if a checklist item is not used or applicable at your school. Please contact Linewize support if your school is making changes to network hardware or configuration.

#	Action	Navigation	Description	Done	Not Required *	Notes
1	Review Permissions	Debugging > Permissions	Review role allocation and update Permissions to reflect any changes with staff, including associated student year groups.	<input type="checkbox"/>	<input type="checkbox"/>	
2	(Appliance only) Check the School Manager Device firmware is current	Debugging > Device Updates	Ensure the School Manager appliance has been updated to the latest version and that automatic updates are enabled. Please contact Linewize Support if you require further assistance.	<input type="checkbox"/>	<input type="checkbox"/>	

#	Action	Navigation	Description	Done	Not Required *	Notes
3	Update the Calendar	Configuration > Calendar	<ul style="list-style-type: none"> Review the operating days and times for your school Update your non-school days (including Public Holidays) 	<input type="checkbox"/>	<input type="checkbox"/>	
4	Validate Time Periods	Configuration > Objects > Time Periods	Review the Time Periods to ensure they are current. Review Time-Based Filtering Policies for guidance, or contact Linewize Support for help.	<input type="checkbox"/>	<input type="checkbox"/>	
5	(Community Customers Only) Upload new Parent Data	Configuration > Community > Parent Data Upload (CSV Upload)	Upload new Parent data for the year via CSV export or sync with your SIS to allow new parents to access Qustodio features.	<input type="checkbox"/>	<input type="checkbox"/>	
6	Check the Content Filtering Policies	Filtering > Content Filtering	Review your Content Filtering Policies to ensure they are current. Review the Content Filtering Policy examples for guidance, or contact Linewize Support for help.	<input type="checkbox"/>	<input type="checkbox"/>	

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7	Review Content Modifications	Filtering > Content Modification	Review your Content Modification Policies to ensure they are current.	<input type="checkbox"/>	<input type="checkbox"/>	
8	Check Safe Search settings	Filtering > Safe Search	Review and test safe search settings for Connect and, if used, the School Manager Appliance.	<input type="checkbox"/>	<input type="checkbox"/>	
9	Update your Reports and Alerts	Filtering > Reports and Alerts	<ul style="list-style-type: none"> Review reports and alerts settings. Ensure reports go to the correct users and are segmented by the student groups most relevant to each user. 	<input type="checkbox"/>	<input type="checkbox"/>	
10	Review Realtime alerts (email notifications)	Filtering > Reports and Alerts	Review Realtime Red Flags and Filtering Alerts for staff with Reporting/Pastoral Care permissions.	<input type="checkbox"/>	<input type="checkbox"/>	

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11	(If enabled) Check your Bypass Codes	Filtering > Bypass Codes	Expire any unnecessary Bypass Codes and generate new ones if needed.	<input type="checkbox"/>	<input type="checkbox"/>	
12	Check Guests	Configuration > Users and Groups > Guests	Remove any old Guest Tokens and generate new ones if needed.	<input type="checkbox"/>	<input type="checkbox"/>	
13	Update Groups	Configuration > Users and Groups > Groups	Update your source of truth (user data) and either sync it with School Manager (SIS or directory service) or manually add, edit or remove Groups.	<input type="checkbox"/>	<input type="checkbox"/>	
14	Check Network credentials and syncing	Configuration > Authentication	Ensure your network authentication credentials are current, and that the last sync was performed successfully without errors. Ensure your integrations have synced.	<input type="checkbox"/>	<input type="checkbox"/>	

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15	(Captive Portal enabled) Test the Captive Portal	Configuration > Authentication > Captive Portal	Review and test Captive Portal settings (if required) by attempting to connect to your school's network with an unauthenticated device.	<input type="checkbox"/>	<input type="checkbox"/>	
16	(Captive Portal enabled) Check Associations	Configuration > Users and Groups > Associations	Remove or purge any unnecessary associations.	<input type="checkbox"/>	<input type="checkbox"/>	
17	Check the Objects	Configuration > Objects	Review and refresh your Objects and Object Pools. Pay particular attention to any Pools that affect or are used for content filtering, including Pools that block or allow keywords, sites or URLs, and Pools that exclude your school's IT infrastructure from filtering.	<input type="checkbox"/>	<input type="checkbox"/>	
18	(Walled Garden enabled) Check Walled Garden	Configuration > Walled Garden	Review and test Walled Garden settings by connecting to your school's network using a device without <i>Linewize Connect</i> installed on it.	<input type="checkbox"/>	<input type="checkbox"/>	

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19	(Mobile Agent enabled) Review Mobile Agent configuration	Configuration > Mobile Agent	Your mobile agent configuration determines what, when and how Connect filters and monitors student devices. Contact Linewize support if you want to make changes to your Mobile Agent configuration.	<input type="checkbox"/>	<input type="checkbox"/>	
20	Check the Block Page	Configuration > Block Page	Ensure the block page logo, block message and policy links are correct. Review logout permissions.	<input type="checkbox"/>	<input type="checkbox"/>	

Additional Info: