

End of Year Checklist



User Management

- Audit team members ([Add and Manage Users](#))
- Review current users & roles ([User Roles](#))
- Deactivate (or [delete](#)) team members no longer with the district
- Update team members based on next school year positions

Topic and Category Management

- Audit topics ([Dashboard Comparison Reports](#))
- Review the data on ticket count per topic ([Topic Comparison Reports](#))
- Identify topics that can be archived
- Evaluate if additional topics need to be created
- Ensure all topics have a team member working over the summer
- Summer coverage plan
- Add department owner/global user if needed
- Create workflows as needed to ensure summer coverage ([How to Create Workflows in Onflo](#))



Calendar Management

- District calendar
- Ticket Aging: Update calendar for the upcoming school year
- Set district-wide out of office for any summer holidays



Resource Management

- AI Resources
- Audit existing resources ([Resource Management](#))
- Upload new resources for the upcoming school year
- Update response templates & success messages
- [Response Templates](#)
- [Success Messages](#)
- Audit translations ([How to Set Up Translations](#)).



Summer Projects

- Identify summer projects
- Onboard new departments & campuses

- Refresh existing forms ([Form Builder](#))
- Add new forms
- Refresh landing pages ([Topic Planning for Your Team](#)).
- Develop new workflows ([How to Create Workflows in Onflo](#))
- Identify new category owners
- Launch chatbot ([How to Set Up Chatbot](#))



Planning for Next Year

- Identify training needs for upcoming school year ([Onflo Academy](#))
- Update schools as needed
- Set up telephony and texting
- Identify group emails that can be forwarded to Onflo
- Update your SIS and SSO information as needed
- Promote Onflo for back to school