



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