



Board Agenda Item #	Agenda #IID
Date:	11.15.2017
To:	Magnolia Board of Directors- Academic Committee
From:	Caprice Young, Ed.D., CEO & Superintendent
Staff Lead:	David Yilmaz, Chief Accountability Officer
RE:	Illuminate Transition Plan (School Information System)

Proposed Board Recommendation

This is an information item.

Background

On May 20, 2017 the MPS board of directors approved a transition plan for Magnolia's Student Information System (SIS), i.e., from CoolSIS to Illuminate. MPS has already been using Illuminate's Data and Assessment (DnA) module since 2016-17 and is now excited to use its SIS in conjunction with the DnA to increase effective use of the program.

Attached are Illuminate's proposal for 2017-18 and beyond and a transition plan that addresses set-up, data migration, admin bootcamp, and train-the-trainer local bootcamps to ensure successful transition into the new SIS.

Our data manager and SIS coordinator Mr. Ozkay oversees the transition plan. Please see the attached project plans for further details.

Budget Implications

- Amounts/ Funding Source
- CFO Review

This SIS transition has been budgeted and approved by the board at their meeting on 05.20.2017. *Copied here from the board cover page of that meeting:*

Illuminate SIS and transition cost based on an estimate of 3,800 students:

- FY 2017-18 (TRANSITION YEAR): \$27,500 (Setup & Admin Bootcamp, Data Migration, Train-The-Trainer Local Bootcamps)

FY 2017-18 cost will be covered by the MERF Home Office. (BUDGETED)

- FY 2018-19: \$40,100 (FULL IMPLEMENTATION) (\$13,800 for 9 days of BootCamp and \$7 per student license for 3,800 students)

FY 2018-19 cost will be covered by the schools. (WILL BE BUDGETED FOR 2018-19)

- FY 2019-20+: \$7 per student license fee; \$26,600 for 3,800 students

FY 2018-19 and on, schools will incur the cost.

How Does This Action Relate/Affect/Benefit All MSAs?

Illuminate SIS has been approved by our board and it is important that we have a plan for successful transition to this new SIS.

Name of Staff Originator:

David Yilmaz (Chief Accountability Officer) and Ismail Ozkay (Data Manager & SIS Coordinator)

Exhibits (attachments):

- Illuminate Education Proposal
- MPS ISI Implementation Project Plan Key Dates
- MPS ISI Implementation Project Plan Timeline

Proposal

Magnolia Public Schools - ISI

Prepared For:

Magnolia Public Schools
Westminster, California

Prepared On:

1/28/2017

Prepared By:

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1. COMPANY VISION

Illuminate Education exists to create tools, services and training to promote educator and student success. By building a vibrant team, making technology useful in districts and classrooms, and investing in local communities, we look to empower people from all backgrounds to reach their full potential in school and career achievement.

At the heart of Illuminate are educators just like you: we are a team of former school administrators, teachers, district technologists, instructional coaches, special education instructors and curriculum directors. We are also seasoned designers and engineers who are passionate about building products to make your lives easier.

We have reached over 5 million users across 43 states including students, parents, teachers and administrators. We are proud to have partnered up with over 14,000 schools and 1,600 districts including Boston Public Schools, San Diego Unified, Denver Public Schools, Caddo Public Schools, Newton Public Schools, and Salt Lake City School District.

Illuminate Education is committed to equipping our communities to flourish in the school and workplaces. Together, we believe we can change the world of education.

2. PROPOSAL

Illuminate Education proposes a contract with Magnolia Public Schools. Although a contract may span multiple years, Magnolia Public Schools retains the right to opt out each year at no financial penalty. The proposal includes data import support, system maintenance, system support, and user support for the length of the contract. It also includes ongoing system upgrades at no additional cost to Magnolia Public Schools.

3. PRODUCT OVERVIEW

Illuminate Education is proud to offer Illuminate Student Information System (ISI), a platform that provides all school-site staff a single, web-based point of access to attendance, scheduling, grades, reporting and more. ISI anticipates the needs of all educators and removes the boundaries of the traditional student information system.

With our system, districts and educators can focus not just on compliance but student growth. Employing Web 2.0 technologies and a user-friendly interface, ISI supports all aspects of the education process: from district-level educators who need to analyze sweeping patterns and trends, to instructional leaders who require fast, flexible reports to shape curriculum and instruction in the classroom.

ISI is focused on being dynamic and providing all-around student data, which allows educators to leverage all available information to truly educate the whole child. Educators will have an all-in-one solution to support streamlined operations and effective decision-making at all levels.

4. PRICING

student count numbers provided in this quote are estimated. The contract will use the prior fiscal year's Fall student count from the appropriate California state website. This proposal was created using the dates of 7/1/2017 through 6/30/2021. Illuminate recommends the following model for Magnolia Public Schools:

Implementation Phase

QTY	PRODUCT	DESCRIPTION	LIST	UNIT	TOTAL PRICE
3,800	ISI - Licenses	Per Student Licenses - Illuminate Student Information™ (ISI)	\$7.00	\$0.00	\$0.00
1	ISI Setup & Admin Bootcamp - Flat Rate	4-day bootcamp including pre & post-bootcamp implementation web support, guided system setup and configuration, and ISI System Admin training. Hosted at Illuminate HQ (Irvine, CA). Client responsible for travel & hotel accommodations.	\$4,000.00	\$4,000.00	\$4,000.00
1	ISI Data Migration Bootcamp - Flat Rate	4-day bootcamp including pre & post-bootcamp implementation web support, the data migration process, and training on ISI data tools and validation logs. Hosted at Illuminate HQ (Irvine, CA). Client responsible for travel & hotel accommodations.	\$1,000.00	\$1,000.00	\$1,000.00
5	ISI Train-the-Trainer Local (Full Day)	Full Day Train-the-Trainer On-site Training - Illuminate Student Information™ (ISI)	\$1,500.00	\$1,500.00	\$7,500.00
1	ISI Data Migration - Additional Support		\$15,000.00	\$15,000.00	\$15,000.00
				Total	\$27,500.00

Year 1

QTY	PRODUCT	DESCRIPTION	LIST	UNIT	TOTAL PRICE
3,800	ISI - Licenses	Per Student Licenses - Illuminate Student Information™ (ISI)	\$7.00	\$7.00	\$26,600.00
9	ISI Master Schedule Bootcamp (Per Site)	3-day bootcamp that guides site leaders through the data-informed process of collecting course requests, building the master schedule, and scheduling students. Hosted at Illuminate HQ (Irvine, CA). Client responsible for travel & hotel accommodations.	\$1,500.00	\$1,500.00	\$13,500.00
				Total	\$40,100.00

Year 2

QTY	PRODUCT	DESCRIPTION	LIST	UNIT	TOTAL PRICE
3,800	ISI - Licenses	Per Student Licenses - Illuminate Student Information™ (ISI)	\$7.00	\$7.00	\$26,600.00
				Total	\$26,600.00

Year 3

QTY	PRODUCT	DESCRIPTION	LIST	UNIT	TOTAL PRICE
3,800	ISI - Licenses	Per Student Licenses - Illuminate Student Information™ (ISI)	\$7.00	\$7.00	\$26,600.00
				Total	\$26,600.00

STUDENT INFORMATION SYSTEM



"When I walk into a classroom or visit a school a teacher always approaches me and says something like, 'Wow!! Illuminate is so user friendly. I love the reports, or I love the gradebook, or I love how easy report cards are now, or that assessment stuff is really cool! I can't wait to use it more.' Illuminate really is changing the face of education through technology."

Rufus Thompson
(Technology
Coordinator, Mountain
View School District)

Illuminate Student Information™ is the "next generation" Student Information System (SIS) that provides all district and school site staff with a single, web-based point of access to student demographics, attendance, scheduling, discipline, grades, assessment history, state reporting mandates, report cards, parent portal, student portal, gradebook, reporting, and more.

User-personalized **dashboards** with any data.

Create **custom reports/forms/letters/labels** with simple point-&-click/drag-&-drop (no queries).

Powerful and easy-to-use **master scheduler, walk-in scheduler**, and tools to give students exactly what they need.

Reduce data entry: **parent and student portals** communicate information and facilitate data entry and data validation.

Most common educator feedback: "It's just **so fast and easy to use.**"

Everything you need in an SIS, **simply and effectively.**

FEATURES

Attendance

- By Roster
- By Seating Chart
- Robust Attendance Reporting
- Notifications/Attendance Letters

Scheduling

- Walk-In Scheduler
- Advanced Master Scheduler
- Robust Scheduling Reports

Grades

- Notifications
- Reporting
- Incident Tracking Management
- Graduation Requirement Tracking
- Gradebook
- A-G reporting
- Customizable GPA Management
- Customizable Transcripts

Powerful Reporting

- Charting and Graphing Capabilities
- Custom Label Design and Generation
- Customizable Dashboard
- Customizable Student Profiles
- Sortable Prebuilt Reports
- Drag and Drop Customizable Form Letters
- Complete State Data and Reporting

Discipline

- Notifications
- Reporting
- Incident Tracking Management

Health

- Customizable Student Health Profiles
- Complete Immunizations Tracking and Reporting
- Blue Card
- Auditing
- Student Screening
- Mass Screening
- Health Plans

Parent & Student Portals

- Includes Parent and Student Messaging
- Includes Links to Curriculum Resources
- On-line Student Registration

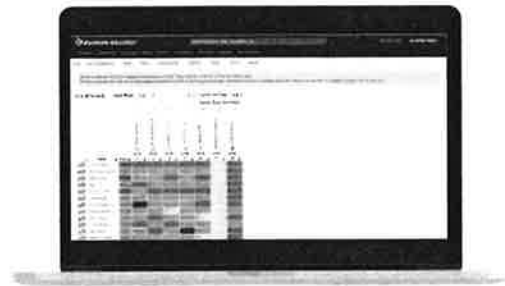
Report Cards

- Standards-based/Common Core

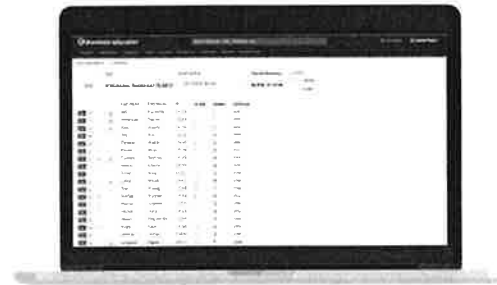
And ...

- Program and Intervention Management
- Custom Alerts and Notifications
- Early Warning Identification System (On Track)
- Complete RTI Functionality and Reporting
- Direct Links to Curriculum Resources
- Customizable Student Demographics Profile
- Create Unlimited Custom Demographic Data Elements
- Mass Email Notifications
- Customizable Student Registration
- Counselor Log
- Student Notes

GradeBook Module



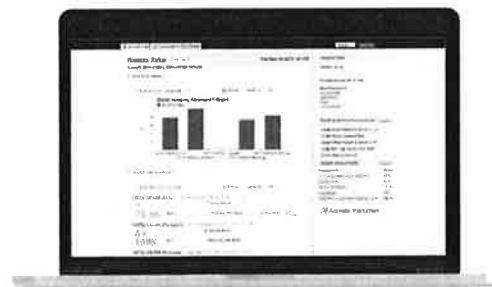
Attendance Module



Scheduling Tool



Student Portal



DATE	EVENT	PARTICIPANTS	TIME/LOCATION
10/31/2017 - 11/2/2017	Data Bootcamp	Data Team	Illuminate Office - Irvine
11/28/2017 - 12/1/2017	System Admin Bootcamp	System Admin Team	Illuminate Office - Irvine
2/27/2018	ISI Training	System admin (half day)	9am-12pm MPS Home Office
3/9/2018	ISI Training	Office Managers - AM Teachers - PM (gradebook, attendance, minor behavior, general student searching)	MSA-8
3/13/2018	ISI Training	Dean of Students (Behavior, Point tracking, Chronic Absentee, Contacts, Health & Wellness)	Home Office
TBD	ISI Training	Office Managers - AM	TBD
4/5/2018	ISI Training	Dean of Academics (Scheduling, Basic student information, Student population groups, interventions) College Counselors (graduation, transcripts, A-G, 4	Home Office
4/19/2018	ISI Training	AP/Principals - PM (Reports for Gradebooks, Attendance, Behavior, Transcripts/Report Cards)	Home Office
5/1/2018	ISI Training	System admin (half day)	MPS Home Office
6/15/2018	Last day of school 2017-18		
8/14/2018	First day of school 2018-19		

Student Information System Implementation Timeline

Date	Activity Title	Description	Time & Location
Sept 12, 2017	ISI implementation kick off webinar	Introductory web meeting to discuss initial implementation plan for ISI	9-10am GoToMeeting
Oct 12, 2017	ISI onsite implementation meeting	In-depth planning meeting for 18-19 roll out of Illuminate Student Information (ISI)	9am-12pm 250 E. 1st St. Ste 1500, Los Angeles, CA 90012
Oct-2017	MPS Leadership Team, First Meeting	During an implementation, Illuminate Education recommends MPS have a Leadership Team. This is typically comprised of MPS leadership staff from the Executive Director to MPS school admin. The purpose of the team is to provide high level leadership, support for the implementation, and policy support as needed. Add as an agenda item Wednesday academic team meeting.	
Oct-2017	MPS IT Team, first data migration meeting	Phone conference with MPG IT Team and Illuminate Education's migration team.	
Nov-2017	Board Update	At it's regular Board Meeting, the Board heard an update related to the implementation of Illuminate Education as the district's next SIS.	Start with Academic Team Committee and provide written update for November Board member and inform Dr. Young at C-Team meetings
Dec-2017	Exploring Scheduling in Illuminate ISI	A meeting to begin exploring the possibility of doing master scheduling in ISI.	
Oct 31 - Nov 2, 2017	Data Bootcamp	IT Data Team to Illuminate Education's headquarters in Irvine for a two day Data Bootcamp.	9am-4pm 6531 Irvine Center Dr Suite 100 Irvine CA 92618
Nov 14-15, 2017	Elementary Report Card Workshop		9am-3pm 6531 Irvine Center Dr Suite 100 Irvine CA 92618
TBD	Elementary Report Card Standard Meeting	First in a series of meetings to review past standards work and establish the new form and content for elementary report cards. The committee is targeted for 3 staff per grade level with every site represented.	
Nov 28 - Dec 1, 2017	ISI System Admin Bootcamp	MPS Team to Illuminate Education's headquarters in Irvine for a four day System Admin Bootcamp.	9am-4pm 6531 Irvine Center Dr Suite 100 Irvine CA 92618
Dec 5, 2017	Data & System evaluation	Data & system setup check-in to evaluate the feasibility of master scheduling for 18-19	10-11am Web?
Dec 7, 2017	Magnolia Public Schools 18-19 Master Scheduling (Dean of Academics meeting)		10-11am Web?
Mid February	CALPADS data checks	Run Fall 1 & Fall 2 extracts and do comparisons between CoolSIS & ISI	

Mar 20, 2018	Master Schedule Bootcamp: Course Requests	Session 1 of master scheduling bootcamp focuses on methods to collect course requests.	9am-3pm 6531 Irvine Center Dr Suite 100 Irvine CA 92618
Apr 17, 2018	Master Schedule Bootcamp: Building the Board	Session 2 of master schedule bootcamp focuses on using Illuminate tools to build a draft scheduling board.	9am-3pm 6531 Irvine Center Dr Suite 100 Irvine CA 92618
May 15, 2018	Master Schedule Bootcamp: Scheduling Students	Session 3 of master schedule bootcamp focuses on scheduling students to sections.	9am-3pm 6531 Irvine Center Dr Suite 100 Irvine CA 92618
	Cohort Google Hangout	This is the first in the bi-weekly Google Hangouts with our cohort. This is to further the training of the System Admins as we continue the transition work.	
	Trainer of Trainers Training	Training over four days for various trainers of trainers. Details for this training will be determined by the ISI Implementation Team	
	Custom Reports Practice	An open session for interested subcommittee members to practice and get help on Custom Reports	
	Re-Training	Various training options for all staff. Topics established by MPS Implementation Team.	
	Go Live	This is the day that Illuminate Education's ISI becomes the authoratative system for all student records	
Aug 14, 2018	First Day of School	First day of school!	



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ISI System Admin Setup Bootcamp

DAY ONE: Jumping into ISI!

Introductions, Accomplishments & Anticipations

Bootcamp Goals

- Post-its parking lot
- Continue to build cohort support network
- Meet the Illuminate team who will be supporting you throughout your implementation
- ISI system configuration & setup – Individualized and hands-on with ISI support experts
- Learn basic system administrator functions after core system setup (group training)
- Track progress & notes on your **ISI Implementation Project Plan**
- Illuminate Zendesk Community
- Bootcamp structure - Overview, Give it a Try!, Plan it (we do, you do, follow-up)



Group Training

- Big Picture System Overview
- Login and Navigation - Regional Network Meetings, status page, social media
- Overview:** [Big Picture Overview](#)
- Customization of Tiles
- Give it a try!**
 - In your **live site:**
 - Open up your Control Panel and practice changing site and dates.
 - Click on Lessons & Videos and navigate around a bit. Read help



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ISI System Admin Setup Bootcamp

documents about features you are most interested in.

- Sign up for Illuminate Help Center if you have not done so already.
- Resources:** [Illuminate Overview](#), [Control Panel](#), [Student Groups](#)
- Plan it:** Open up Project Plans to keep track of notes and completed tasks. Additionally, use your project plan to jot down great ideas and best practices. These Project Plans are yours - make them so! Add tabs as needed.

10 minute break



Breakout Session

System Setup

1. Setup your 16-17 school year so that you can start running comparison reports. Begin to setup the 17-18 school year for Go Live.

Setup/verify the following system areas from the ISI Project Plan (System Setup tab):

Admin Gear

CALENDAR

- Verify Sessions
- Verify Terms in Term Manager
- Day Types
- Calendar - populate the calendar with the Day Types you created
- Attendance Month Reporting Periods (*Interactive Guide*)

SCHOOL

- Site Management
- Timeblocks and Timeblock Occurrences
- Room Management
- Departments



ISI System Admin Setup Bootcamp

Illuminate Student Information

- Setup Registration Builder

OTHER

- Create Student Custom Fields
 - Sample custom fields: Tshirt size, Locker Number, Back to School Forms Submitted, Resident District Student ID, Walk Release, Off Campus Lunch Permission, Parent Service Commitment Form, Field Trip Permission Form, etc.

**IM refresh metadata*

Students tab

GENERAL

- Create custom Demographic Details page layouts (ex: CALPADS, office, teacher)
 - Add custom fields as necessary
 - Duplicate & share layouts by role

Working lunch to finish up System Setup above



Group Training

USERS

- Overview:** [Users Overview](#)
- Give it a Try:**
 - In your **sandbox:**
 - Look at your current Roles. Check to see if each Role has been completely setup
 - Go into Permissions and practice copying permissions over to another Role
 - Become Another User and use the Check Permissions feature on



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several pages

- ❑ Try running the List User's Permissions report

- ❑ **Resources:** [Create Role](#), [Manage Users](#), [Manage Permissions](#), [Copy Permissions](#), [List User's Permissions report](#), [Mass Password Reset](#)
- ❑ **Plan it:** Identify which roles are going to be kept (from DnA) and which roles will need to have the new ISI starter roles copied over to them. Using your project plan, indicate which individual will be in charge of managing and sharing out roles.

Note: Best practice recommendations:

#1 Setup users.txt on automation in the sandbox now. Make any necessary changes to the file so that it is ready to import into live. Then during the summer import your final users.txt file into the live site.

#2 Take a firm stance on password security. If your organization does not utilize Google SSO or Active Directory then set up minimum password requirements for your users and communicate these requirements and their importance to them.



Continue Breakout Session for System Setup

Setup the following system areas from the ISI Project Plan (System Setup tab):

Admin Gear

USERS

- ❑ Role Management
 - ❑ Verify and add all roles that will be assigned to end-users

Note: Illuminate pre-installed sets ("ISI: _____" roles) are starter templates to copy permissions to the roles you create. This should only be completed in Live after final closeout of outgoing SIS.

- ❑ Permissions
 - ❑ Copy pre-installed ISI roles to instances



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- <http://help-isi.illuminateed.com/m/8504/l/22815-copy-permissions>
 - User Management
 - Verify/edit users (including site & role affiliations)
 - Spot-check an office manager's permissions using either Become Another User or your preferred permission verification tool from above
- Note:** Permissions will need to be adjusted based on the specific needs of your organization.

ATTENDANCE

- Verify Attendance Flags (order, category)
- Ignore Attendance Letter section (deprecating - new option will be shown at a later date)
- Share out with the **appropriate roles** (always share with Illuminate Admin!)

Schedule Staff Trainings

- Illuminate implementation team members will work with you to schedule Train-the-Trainer sessions as well as any additional requested training after discussing individual training needs.
 - See sample training schedule and course descriptions
- Schedule ISI confirmations web session (May, June, July)
- Schedule post go-live check-in meeting (mid September)

Daily Wrap-up

- Revisit Project Plan
- Post-its Parking lot entries

Day 1 Homework/Review

- Finish any setup on today's agenda that has not been completed
- Data Logs - Ticket submissions
- Review Train-the-Trainer courses and confirm date options

Sandboxes will be refreshed tonight. Notify your implementation manager if your site needs to be excluded from the refresh process for any reason.



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ISI System Admin Setup Bootcamp

DAY TWO: Keep on keepin' on!

Discussion Question

- What were your big take-aways and challenges from yesterday?
- Additions to <http://process.illuminateed.com/charter/>
- Revisit users.txt



Group Training

Registration and Enrollment

Let's do it together!

- Create a New Student (*Interactive Guide*)
- Demographic Details
 - Switch to one of the layouts created yesterday
- Schedule 2.0
 - Overview:** [Schedule 2.0 PPT](#)
 - Give it a try!**

But first, here's some help: [Click Here!](#)

In the **sandbox:**

1. For the student you created above: Use Schedule 2.0 to give the student a new class with a start date of today



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Illuminate Student Information

2. Print a locator for the student
 3. Edit the class start date to be next Monday
 4. Drop the student from the class as of next Friday
 5. Brainstorm with your partner as to when to use the delete option and when to use the end date option.
- Plan it:** Appropriate district users will need to be trained on Schedule 2.0 after 17-18 master schedule has been imported to make individual scheduling changes as needed. They will also need to be able to use Schedule 2.0 when creating brand new students in Illuminate over the summer (post system go-live).

Contacts

- Overview:** [Contact PPT](#)
- Give it a try!:**

But first, here's some help: [Click Here!](#)

In the **sandbox:**

- Enter a contact for a student
 - Run Duplicate Contact Finder, Dwelling Merger, Household Merger
 - Have you implementation manager run the one time merge script to see how many duplicates can be removed.
 - Plan it:** Based on the number of duplicates that are left indicate on your project plan how much time you will need for the actual contact cleanup project to be done after the last day of school. Consider setting a calendar reminder for yourself for this.
- Health Profile
 - Overview:** [Health 101 PPT](#)
 - Give it a try!:**

But first, here's some help: [Click Here!](#)

Complete the following [health scenarios](#) in the **sandbox:**
 - Plan it:** On your project plan spreadsheet, note your district's plan for



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[importing](#) or manually entering health data. Be sure to backwards plan from your health staff training date!

❑ Student Programs

❑ **Overview:** [Student Programs PPT](#)

❑ **Give it a try!** In the **sandbox**:

But first, here's some help: [Click Here!](#)

1. For the student you created above: Add a Student Program for Free & Reduced Lunch (status is free)
2. Change the program exit date to next Friday
3. For the same student, add a Student Program for Gifted and Talented

❑ **Plan it:** In your project plan spreadsheet, document the plan for importing programs.txt data. Keep in mind any updates to code management that will be needed to successfully import student programs.

❑ Language

❑ **Overview:** [Language PPT](#)

❑ **Give it a try!:** In the **sandbox**:

For the student you created above:

1. Update English Proficiency to be EL
2. Update EL Setting to be Alternative English Immersion
3. Update Home Language Survey information to indicate First Language = Spanish
4. Update Home Language Completion Date to be today's date
5. Add an EL Setting Waiver that was approved for the 17-18 school year (make up start and end dates)
6. Add a Language Comment indicating that the student will be CELDT tested in the summer

❑ **Plan it:** In your project plan spreadsheet, document the plan for importing language.txt data.

❑ Special Ed

❑ **Overview:** [Special Education PPT](#)



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Give it a try! In the **sandbox:**

For the student you created above:

1. Give the student a primary disability
2. Indicate the Plan Type as IEP
3. Initial Assessment Date = today's date
4. Add Bus Information data starting on 8/1/17 and ending on 6/1/18
5. Add a special education comment indicating that the counselor needs to review the student's IEP

Plan it: In your project plan spreadsheet, document the plan for importing specialed.txt data.

Enrollment History

Overview: [Enrollment History PPT](#)

Give it a try!: In the **sandbox:**

1. Change enrollment start date
2. Add a show show record
3. Change student grade level

Plan it: In your project plan spreadsheet, document the plan for importing enrollment.txt data.

- Exiting a student, no show, delete
- Change grade/program
- Transfer students for reporting/authorizing school district
- Primary enrollment
 - Non-Primary Enrollment report

Return to Code Management

- Transfer Districts: create a code for your authorizing district

10 minute break



Breakout Session



ISI System Admin Setup Bootcamp

Illuminate Student Information

Practice time! Use sample registration packets to complete the process to enroll/register a new student in your live site or sandbox site (if setup on automation)

Working Lunch

Additional Site Configurations

Use the project plan column D of System Setup Tab for guidance

- Additional known state data imports
- Student Photos
- Banner Blasts
- Widget Management
- Student Alerts
- Code Management for Comments
-

Documentation Discussion

Reports Crosswalk Planning (IM to install any known crosswalks to project plans)

Who at the district will be responsible for creating additional district specific documentation and crosswalks?

Daily Wrap-up

- Revisit Project Plan
- Post-its parking lot entries

Day 2 Homework/Review

- Finish any setup on today's agenda that have not been completed
- Make sure that all Attendance Letters are installed
- Sandboxes will be refreshed tonight. Notify your implementation manager if your site needs to be excluded from the refresh process for any reason.



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DAY THREE: The end is near!

Discussion Question

- ❑ What are your top priorities for ISI for the start of the 17-18 school year?



Group Training

CALPADS Best Practices

- ❑ **Overview:** [CALPADS Overview](#)
- ❑ **Give it a Try!:** Go to Reports>>State Reporting, and select SENR or SPRG. Run 1 extract and review existing data errors
- ❑ **Plan it:** In your project plan, designate the individual who will be responsible for ensuring appropriate CALPADS setup. If new to CALPADS, this user should sign up for CALPADS training webinars. Additionally, at least 1 person should be registered to attend each of the following:
 - ❑ Register for the [September/Fall 01](#) training
 - ❑ Sign up for the Illuminate [CALPADS Users Mailing List](#) for information about future Illuminate workshops, webinars, and trainings!
 - ❑ Register for [Illuminate CALPADS and Coffee/Cookies Calls](#) (starting in August)
 - ❑ Register for [CALPADS Training Webinars](#) (for new CALPAD users)
 - ❑ Register for [CALPADS Q/A](#)
 - ❑ Sign up for [ListServe](#)



ISI System Admin Setup Bootcamp

Illuminate Student Information

10 minute break

Introduction to Reports and Custom Reporting

Overview:

- ❑ How reports are laid out in Illuminate
 - ❑ Module reports, pre-built reports, custom reports
 - ❑ [Custom report data](#)
 - ❑ Custom reports for data validation & other cool places they work in the system
 - ❑ Starting point for custom reports **Search 2.0**
 - ❑ Adding columns – how do I find and add columns?
 - ❑ Filtering
 - ❑ Sorting
 - ❑ Title

Give it a Try! Custom Report Practice

- ❑ Build custom reports from [scenarios](#) provided
- ❑ Run custom reports & pre-built or modular reports to validate core data
- ❑ Resources: [Custom Report Quick Guide](#)

Plan it:

- ❑ What reports does your staff need day one? Custom or pre-built?
- ❑ Which reports should be Favorites? Tiles?
- ❑ Which custom reports should be built and shared with users prior to the first day of school? Who will be the report creators?

Working lunch



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Custom Reports Continued – Intro to some advanced features

What else can custom reports do?

- Form letters
- Labels
- Grouping



Group Training

Attendance Overview

- Overview:** [Attendance Overview](#)
- Give it a try!:**
 - In your live site,
 - Check your current Attendance Program settings at the Session level.
 - For homework tonight, create an inventory of attendance programs currently being used. Work with your IM to create any new attendance programs.
 - In your **sandbox:**
 - Add an attendance program to a Course, Section, and Student.
- Resources: [Attendance Manual](#), [Attendance Setup](#), [How Attendance Works](#)
- Plan it:** Using your project plan, identify any non-seat based or alternate attendance programs used at your sites, identify the best way to track attendance programs (Course, Section, Student), and ensure you have a plan to ensure accurate reporting. Pull in your Business Office Manager to help with setup and to identify any discrepancies.

Take Attendance

- Overview:** [Attendance Entry](#)
- Give it a try!:**
 - In your **sandbox:**
 - Take Attendance by Class Roster
 - Try adjusting dates and changing between classes
 - Mark at least 2 students as absent
 - Take Attendance by Student
 - Mass Attendance Updates



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- Clear any absences - Absence Reconciliation
- Take attendance for a class
- Take attendance for a student for a week
- Resources: [Attendance Taking Practices](#)
- Plan it:** Using your project plan, make sure Attendance Flags have been shared out appropriately to all roles; specifically, make sure the teacher role has only been given a maximum of three flags. Begin developing your Crosswalk Documentation for taking attendance methods.

Attendance Reports

- Overview:** [Attendance Reports](#)
- Give it a try!** If you have brought over sample attendance data and finished basic system setup, you can practice running these reports!
 - In your **sandbox**:
 - Run the ADA Checker, Daily ADA Report, and Cumulative Attendance
 - Run the Student Summary, Missing Attendance, and Absence Reconciliation Report
- Resources: [Attendance Reports Help](#)
- Plan it:** Discuss with your team and decide which folk will be in charge of creating Attendance Crosswalk Documentation. Add a new tab to the Project Plan including all currently used Attendance reports and their Illuminate counterparts

Attendance Letters

- Overview:** [Attendance Overview PPT](#)
- Locate the PDFs of your current attendance letters so that you can overlay fields onto it in the break out session.
- Configurations & PDF overlay [Attendance Letter PPT](#)
 - [Functionality and Set-Up \(Permissions and Location\)](#)
 - [Manage Attendance Letter Configurations](#)
 - [Templates and Template Linking](#)

What is learned here will also apply later to the following letters/functions.

- Behavior/Suspension Letters
- Secondary Report Cards
- Elementary Report Cards
- Custom Report Form Letter



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- ❑ **Give it a Try!:**
- ❑ In your **sandbox:**
 - ❑ Create configurations & complete PDF overlay (if other team members are present, divide and conquer by also completing Behavior/Suspension letters).
 - ❑ Generate trial letters with imported attendance data or switch to the sandbox and enter attendance data there.
- ❑ Update your project plan to reflect completion of this task.

Daily Wrap-up

- ❑ Revisit Project Plan
- ❑ Post-its parking lot entries

Day 3 Homework/Review

- ❑ Finish any setup on today's agenda that have not been completed
- ❑ Sandboxes will be refreshed tonight. Notify your implementation manager if your site needs to be excluded from the refresh process for any reason.



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DAY FOUR: Home stretch, you're gonna make it!

Regularly Scheduled Web Meetings for ISI Support

- Bootcamp participants & System Admin team will be expected join weekly ISI "hangouts" to ask questions and get support from ISI implementation team
- Hangouts occur every Thursday from 9-10am throughout the first year of implementation.
- System admin will receive a calendar invite for the hangout session offered through GoToMeeting
- System admin is to see the [calendar of topics](#) and invite district participants to attend relevant sessions or watch the recordings

Documentation Discussion

- Reports Crosswalk Planning - prepare a list of reports needed (add to crosswalk tab on project plan)
- Who at the charter organization will be responsible for creating additional charter specific documentation and crosswalks?

Important Extras

- Plan for 3rd party vendor extracts (i.e. Meal system, notification system, etc.)
 - Identify each vendor that will need a data extract
 - Vendor specification should include file formats, required fields, and applicable field level notes see [Sample vendor specification](#)
- Subscribe to our enhancement request tracking system: [Aha!](#)
- Subscribe to the [Illuminate Status](#) page

Post-bootcamp Required Trainings

Required: See the [Training Resources Tab](#) on the Cohort Information Page for additional trainings related to [implementation](#).



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Required: CALPADS [September/Fall01](#), January, May (dates TBD)

Optional: [General Illuminate trainings](#)

Optional but recommended if report cards are needed: [Elementary Report Card Building Workshops](#)

Additional Professional Development Opportunities

- [Regional Network Meetings \(1 day, no cost\)](#)
- [BI \(Business Intelligence\) Tool Workshops](#)
- [Illuminate Education User Conference 2/1/18 to 2/2/18 San Diego](#)

Master Schedule Accuracy

- View imported master schedule and make necessary adjustments to the following:
 - The Board views and filters
 - Job share teachers
 - Double blocked classes
 - Independent study/virtual campus schools (scheduled a student to multiples of the same period??)
 - Verify section and student total accuracy (The Board - see Totals tab)

Course Setup

- Overview:** Course Details [Help Doc](#)
 - Critical fields:
 - Transcript/GPA areas
 - Credits
 - Repeat
 - Applicable Grades
 - Points
 - Scheduling Information

- Critical Tabs



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- Course Grade Levels
- Course Site Affiliations
- Course Teacher Affiliations
- Give it a Try!:** Select one course and click the edit icon. Note which fields are not populated.
- Plan it:** In your project plan indicate if you will adjust your courses.txt file and reimport with additional necessary fields or manually enter and the target completion date.
 - IMPORTANT:** Prior to making any manual adjustments to courses.txt will need to be removed from automation.

Grades tab

SETUP

- Overview:** [Grading Periods](#)
- Give it a Try!:** Create grading periods for the upcoming school year. If next year's grading calendars are not finalized at this point, create grading periods for this year's secondary sites. Work with your implementation manager to make sure that all grading periods have been setup properly for progress and final grades.
- Plan it:** Work with your district team to finalize the grading period calendar for the upcoming school year if necessary.

- Overview:** Grade List [Help Doc](#)
- Give it a Try!:** During data bootcamp you should have worked with the data team to get the basic grade list populated so that transcripts.txt could be imported.
- Edit each grade in the list and set them appropriately.
- Verify all necessary secondary grades are in the list and add any additional grades needed for things such as citizenship and work habits that may not have been part of the transcripts.txt import.
- Plan it:** Note any questions you may have for your secondary education



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department team.

Secondary Report Cards

[Secondary Report Card Help Docs](#)
[Templates](#)

Overview: [Secondary Report Card PPT](#)

Give it a Try!: Tonight for homework upload a sample PDF and see how it works for yourself.

Plan it: Who can you delegate this task to? It's a pretty easy one. Indicate this in your project plan and let them know that they have been "voluntold."

GPA Calculations

Overview: [GPA Overview](#)

Give it a Try!: Create a basic GPA calculation in the Live site.

Plan it: Identify other GPA calculations that need to be created and identify who will be creating these and indicate this on your project plan.

Grad/Course Requirements

Overview: [Course Requirement PPT](#)

Give it a Try!:

- Create one basic requirement in the Live site
- Add categories
- Link to GPA (if applicable)

Plan it:

- Determine what Course Requirements are needed and list them in your project plan
- Determine if you will be importing the course requirements or manually creating them
- Focus only on requirement for the current year (once those are perfect you can easily duplicate and tweak all other years)

Lunch

Transcript Configuration

6531 Irvine Center Dr. | Suite 100 | Irvine, CA 92618

Phone: 949-242-0343 | Fax: 909-266-1935

help@illuminateED.com | illuminateeducation.com





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Overview: [How to create a transcript](#)

Give it a Try!:

- Setup configurations per site if applicable (district wide transcript recommended)
- Individual student transcript
- Mass transcript generation
- Run Requirement Credit Check report and compare to current SIS grad requirement credits

Plan it:

- Discuss site transcript verification plan with counselors and site admin. Note that this is one of the most important steps that cannot be skipped. There is no easy way to do this except to do it.

Daily Wrap-up

- Revisit Project Plan
- Post-its Parking Lot entries

Day 4 Homework/Review

- Go home and relax. You've earned it!