

Edivate Implementation Administration Guide

A Guide to Implementing and Maintaining Edivate

V.2

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Initiation and Setup

Purpose of the Edivate Administration Guide

The purpose of the Edivate Administration Guide is to define and communicate the steps to successfully plan and create goals for Edivate. These goals should align to your school's professional development agenda. This guide provides a proven process for successfully implementing Edivate. The process includes technical implementation steps, utilizing end user training plans and successfully monitoring completion towards end user's Edivate goals. Utilizing the Edivate Administration Guide is the first step to achieving success with Edivate.

Services Description

This services description provided by School Improvement Network, outlines the dated, signed purchase order agreement and the scope of services provided.

Roles and Responsibilities

To implement and sustain effective completion of goals and the technical configuration of the Edivate product, it is recommended the following stakeholders be considered as part of the Edivate administrative and planning team. Please take into consideration specific school instances and understand there may not be a need to employ all the roles listed below, it is only a recommendation.

Consider a diverse group of staff who want to assist in the Edivate implementation. Include those with unique experience and perspectives when it comes to facing the realities in the district/school. This includes the following role recommendations:

- An Edivate System Administrator
- Teachers (new and veteran)
- District/School Leaders/Principals/Instructional Leaders
- Professional Development Representatives
- Human Resources Representatives
- Special Program Representatives (ex: SPED, Gifted and Talented)

School Improvement Network provides technical support for all partners. Utilize one of the avenues listed below to work with one of our technical support representatives to answer Edivate product questions and technical challenges.

Be prepared to provide the following information to the Support Representative:

- District Name
- Building Location
- Point of Contact Name, Email and Telephone Number
- A Brief Description of the Issue, including:
 - Who's experiencing the issue-including username
 - What tool or where in the system the issue is occurring
 - Browser and computer platform information (PC, Mac or Mobile Device)
 - Desired resolution

Technical Support Hours: Mon-Fri 7 AM-5PM MST

Live Chat: help.schoolimprovement.com/support

Phone: 855.337.7500

Mail: support@edivate.com

Technical Specifications

Effective 1/1/16

Edivate and Edivate Observe Online

Desktop/Laptop Computer Requirements

Operating Systems

- Windows 7 — sp1 (or later)
- Mac OS X 10.9 — Mavericks (or later)

Internet Browsers in order of preference

- Google Chrome
- Firefox
- Safari 9 (or later)
- Internet Explorer 11 (or later)

Required Browser Plug-in

- Adobe Flash Player version 13 (or later)
- Download the latest version of [Adobe Flash Player](#)

Mobile Device Technical Requirements

Operating Systems

- iOS 9 (or later)
- Adroid 5.1 (or later)

Hardware

- iPad 2 (or later)
- Android 5.1-compatible mobile device

Internet Browsers

- Safari for iOS 9 (or later)
- Google Chrome for Android 5.1 (or later)

Important: Currently, not all Edivate features are supported on mobile platforms.

Edivate Observe App

Operating Systems

- iOS 9 (or later)

Hardware

- iPad 2 (or later)

Network Access Requirements

The following list must be accessible inside your network to use Edivate. Edivate uses the standard *http* and *https* ports (80, 443). If you are using a proxy server or a content filter, add either a bypass rule or an allow rule for the following:

- schoolimprovement.com
- edivate.com
- pd360.com
- i.pd360.com
- schoolimp-vh.akamaihd.net
- help.schoolimprovement.com
- help.schoolimprovement.com/lib/server/proxy.php

In addition, Edivate uses email to communicate with users. All communication will originate from both the schoolimprovement.com and pd360.com domains. Verify that your email spam filter does not block emails from:

- info@schoolimprovement.com
- schoolimprovement.com
- edivate.com
- pd360.com

Public IP addresses to whitelist

- PD360.com - 192.41.68.105
- Mail.pd360.com - 192.41.68.37
- mail.schoolimprovement.com - 192.41.68.9
- mail.schoolimprovement.com - 64.55.42.190
- edivate.com - 192.41.68.28

Check with your Network Administrator or Internet Service Provider for more information about these network settings.

Media Appliance Requirements

Depending on your organization's Internet connection speed and bandwidth considerations, it may be necessary to install a media appliance inside your organization's network to facilitate Edivate content availability and performance.

A media appliance is an option available to clients for an additional fee. Contact your Strategic Partner Advisor for more information.

- Self-contained streaming media delivery appliance
- 1U rack space
- Ethernet connection (100 Mb or 1 Gb)

Planning (Map)

Implementation Methodology

School Improvement Network's M4 Framework and the Project Management Institute (PMI) Process Phases have been brought together to guide Edivate leaders through the implementation of Edivate.

The M4 Framework including: Map, Model, Motivate and Monitor empowers school and district leaders to fully integrate Edivate into their professional learning plan and school culture. Mapping goals to Edivate feature resources, modeling the use of Edivate for staff, motivating educators to consistently use Edivate to grow and become better educators, and monitoring the usage of Edivate to successfully reach goals.

The PMI Process Phases: Initiation, Planning, Execution, Monitor/Control and Closing are the overarching guide to grouping implementation related tasks and deliverables into sequential groups for consistent, organized implementation strategy.

The Edivate Implementation Guide utilizes both of these methodologies to walk users through, step by step, the recommended implementation process for Edivate.

Key Edivate Implementation Resources

Edivate implementation resources are available to assist in the configuration and deployment of Edivate. These documents and other relevant implementation information can be found by accessing the Edivate Implementation Group found here: <https://www.edivate.com/#groups/320222>

Creating and Documenting Your Edivate Plan

Throughout the process phases of implementing Edivate, it is important to document SMART goals, actions and resource plans to meet defined goals. It is important to keep Edivate stakeholders on track and aware of the timeline of the Edivate implementation. In addition to showing implementation achievements, the Edivate Plan resource is available to capture this implementation record in a single location for easy reference.

Below is an example of how this template can be used to track Edivate incremental implementation progress.

Any School USA Implementation Planning School Year: 2016-2017

Leadership Team Members: *(Assemble your Edivate strategic planning team. Include all stakeholders that will have an impact or influence on planning)*

Team Member Name	Title	Edivate Project Role
Jane Doe	Superintendent	Project Sponsor
John Doe	Director of Professional Development	Project Lead
Cathy Smith	High School Principal	High School Project Lead and Sponsor
Harold Brown	Elementary School Principal	Elementary School Project Lead and Sponsor
Tracy Dunn	Instructional Coach	Support and Reporting
Sharon Peters	High School Teacher	Edivate IT Admin

Project Overview *(Overview on how you will use Edivate to support educator effectiveness)*

Example District is implementing Edivate as a district-wide resource for personalized professional learning. The focus for 2016-17 is on developing and using resources within Edivate to support educator capacity through the use of research-based professional learning, mentoring, and collaboration. Custom observation templates and processes built in Edivate Observe support the district evaluation process.

Priority Edivate Resources *(Identify the Edivate resources you will be utilizing)*

- Video Resources
 Groups
 Catalog
 Focus Objectives
 Learning Progression
 Review
 Collaborative Viewing
 Review
 Courses
 Portfolio
 Edivate Observe
 Processes of Me

Implementation Goals *(SMART is a best practice framework for setting goals. A SMART goal should be Specific, Measurable, Achievable, Realistic and Time-bound)*

1. By Jan 5, 2016, all stakeholders will be provided a training to sign up, cancel, and complete evaluations with fidelity within the Example District. The C&I secretary will send emails to principals of all stakeholders who did not attend the training.
2. By July 1, 2016, a full year of purposeful professional learning courses will be uploaded into Edivate for all stakeholders within the Example District.
 - a. August-October, 2016: New Teacher/Beginning Teacher-Edivate Video (Follow up evaluation)
3. By May 30, 2016, Example District staff will have completed the PLC course with post survey results showing that 75% of staff members will give a 3 or higher on indicators contained in the PLC survey.

Resource Plan and Timeline (Map out your resource plan for Edivate. You can do it quarter by quarter, or for the entire year. This will help easily identify roles and responsibilities related to Edivate features and help assess progress towards SMART goals)



Time Period	Tool	Expectation	Support	Reporting Needs	Progress/Results
Summer	Edivate Observe	Build all observation templates in Edivate Observe and assign user management rights	Edivate Technical Services/John Doe	N/a	Successfully finalized, and shared templates
	Courses	Instructional Coaches will begin training to build courses in Edivate	Instructional Coaches	Edivate Courses Completion Certificate	Created and activated courses
	Courses	Activate and assign facilitators for the following courses: New Teacher/Beginning Teacher, PLC Course	Cathy Smith/Harold Brown, Instructional Coaches, Media Specialists	N/a	
First Quarter- GO LIVE AUGUST 22	Edivate Observe	Begin evaluation process using Edivate Observe templates.	Building Leaders/Edivate Technical Support/Peers	Pull end of quarter Results by Template Report Pull individual observation reports as needed	
	Courses	New Teacher/Beginning Teacher Course Begins, Experience Teachers PD	Course Facilitators/Edivate Technical Support and Help Menu	Bi Weekly Course Progress Report Quarterly Completion Report	Pulled first benchmark report
Second Quarter					
Third Quarter					
Fourth Quarter					



Modeling Edivate: *(In order to ensure that end users are aware of the tools within Edivate, it is necessary for them to see how the tools might be used through modeling)*

How can we model this?

Model each feature during PLC meetings.

Staff Training Needs: *(In order to ensure that end users can navigate the tools within Edivate, it is necessary for them to receive training. They also need a clear understanding of how they will utilize the resource.)*

How can we train staff?

- July 22, 2016 Edivate Admin Edivate Essentials Training
- Classified or Non-Certified Edivate Essentials-1 day (using 17-18 school year)-tentative scheduling October 6th with AM/PM sessions (**Need to reschedule for Jan 30, 2017**)
- District Level Directors-Edivate Essentials/M4-1 day-tentative scheduling Oct 5th-Completed with Kirk Guidry

After Scheduling Oct 5th and 6th, 3 days remain that must be scheduled by 8/31/16

Training Brainstorming:

- New Principal (Admin) Orientation Day-1 day— Completed on July 22
- Connie's Team and Media Specialist/ Course/Catalog Training for Connie--1 day (Date TBD)

Edivate Users

Defining Edivate Users

A critical role, the Edivate System Administrator, is responsible for compiling the requirements for Edivate users. This individual should have the capacity to collect and perform Edivate user management duties. It is recommended this same individual be the point of contact for user management needs related to Edivate, including but not limited to tasks such as, adding and removing users, directing staff password recovery resources, and communicating with School Improvement Network Support as needed.

Determining who will have access to Edivate should directly correlate to who will be responsible for using the system. Typical Edivate users consist of instructional and non-instructional staff, as well as administrative staff members. Using the Edivate User List Template, it is possible to define user accounts, site access requirements, as well as administrative privileges.

Populating the Edivate User List Template

The Edivate User List Template is used to capture user requirements to provide School Improvement Network Technical Support for bulk upload. Create a separate line for each user needing access into Edivate.

Below is a description of each requirement needed to successfully create and Edivate user account and generate login credentials for access.

- Provide the user's **Last Name**.
- Provide the user's **First Name**.
- Provide the user's **Email Address**. *Note: The given email address will be used as the Edivate username.
- **The ID Number** is a unique identifier for each staff member. If using a Student Information System (SIS), it is recommended using the same ID number that is assigned to staff in that system. DO NOT use a SSN.
- The **Admin Tools Privileges** is used to identify the users that will need Admin Tool access in Edivate to assist with configurations and system maintenance. This can be assigned at the district level or at a specific school site level only. You do not want more than a handful of users with this privilege. It is recommended that only leadership staff and project sponsors begin with this access; others can be added later.
- Define the **School Site** or sites the user will be associated with. This can include District Level access. Please include the full name of the site, not an abbreviation.

Submitting the Edivate User List Template

Once the Edivate User List Template has been populated and is ready for upload, email the file to support@edivate.com.

Include the following information in the email:

- Subject Line: Edivate User List
- The name of the district
- The state in which the district is located
- The Edivate System Administrator contact information and name
- The preferred upload date
- The required upload date
- The name, email address and telephone number of the individual responsible for managing Edivate users
- A note indicating Yes or No, for user credentials to be emailed to users directly when the upload is completed

Once the upload request has been submitted, an email confirmation will be sent to the Edivate System Administrator providing a case number for tracking.

A subsequent email will be sent once the upload has been completed.

LDAP User Import Tool or SAML SSO

For the following choices, please contact support@edivate.com indicating what you want to do. Our support services will contact you for the next step. Please work with your technology team to review which option would work best for you.

Edivate Training Services

Edivate Training Services Catalog

To continue to grow Edivate capacity, visit the Edivate Training Services Catalog to find your next Edivate training event.

The Edivate Training Services Catalog can be found in the Resource area of the Edivate Implementation group: <https://www.edivate.com/#groups/320222>

Submitting a Training Request

To submit a request for purchased training, begin by sending an email to Edivate support: support@edivate.com.

Include the following information in the email:

- Subject Line: Edivate Training Request
- The name of the district
- The state in which the district is located
- The Edivate training contact information and name
- The training being requested
- Three potential date options to hold the training

School Improvement Network’s Training Coordinator will respond to the listed primary point of contact to confirm the logistics, assigned facilitator and finalized date for your training event.

Edivate Distance Learning Resources

Edivate offers a variety of on demand distance learning resources, available 24/7, found within the Help Menu in Edivate and in the Edivate Implementation Website. These resources include release notes, user guides, distance learning training resources, as well as access to our support staff.

To access Edivate Help Menu distance learning resources, visit this link:
<http://help.schoolimprovement.com/index.html>

To access the Edivate Implementation Website, visit this link:
[Edivate Implementation Website](#)

Execution (Motivate and Model)

Customizing Edivate Resources

Before rolling Edivate out to users, customizing Edivate tools is required. Utilizing the Edivate Help Menu and the available distance learning resources, can assist in understanding how to configure needed Edivate features.

The Edivate Help Menu User Guide can be found by following this link:
<http://help.schoolimprovement.com/guides/>

Additional customization resources can be found by visiting the Edivate Implementation group found here:
<https://www.edivate.com/#groups/320222>

Communicating Edivate Goals and Creating Incentive

Part of a successful rollout of Edivate involves creating SMART (specific, measurable, attainable, realistic, time bound) goals that align initiatives. Initiatives come from many different sources including, but not limited to: School Improvement Plans, professional growth plans, cumulative data reviews, accreditation/self studies, teacher certification, state/district initiatives and mandates.

Desired outcomes are attained through aligning your Edivate SMART goals with existing initiatives and building in accountability measures. Accountability is an important part of engaging and motivating educators.

Incentive is a major driver in a successful implementation. Aligning Edivate features to overarching initiatives, and creating additional incentive as a part of the Edivate rollout plan will increase Edivate usage totals and successful completion of Edivate SMART goals.

Making Edivate Personal

Part of the technology schema today is personalization for every single user. Edivate's dashboard and profile settings not only allow for personalization, the Edivate system uses the personalization to recommend Edivate video content relevant to the users personal needs, making Edivate even easier to use.

Using the Tell, Show, Do, Apply Model

Using the Tell, Show, Do, Apply model when rolling out Edivate will benefit both the Edivate Admin, as well as the Edivate user. This will ensure proper expectations are communicated and followed as Edivate is implemented.

Tell (Map and Motivate)

Tell users key information as it relates to the Edivate feature they will be using. This would include how to access the feature, the steps they will follow to complete the task, the deadline for completion, and why they need to utilize Edivate and complete the task. Any relevant information associated to the go live of an Edivate resource should be properly communicated to the users. It is good practice to provide a takeaway document users can reference as they begin to utilize Edivate as directed.

Show (Model)

All users learn differently. In addition to verbalizing instructions and other relevant information, it is important to also show users what they are being told. Modeling the steps, in addition to articulating them, will assist in ensuring a majority of users will master the task at hand with ease.

Some ways to model to users include: in person role playing, a modeling presentation, providing a document with screenshots, recording a session where a facilitator is modeling the behaviors required to complete the task.

Do (Monitor)

Equally as important when go live occurs is openly communicating and directing users where they can go to receive assistance if they run into roadblocks, technical or user based, to solve their problem. It is important they are able to complete the resolution quickly and simply, as to get back to the Edivate directive and successfully complete the task.

The desired outcome of this phase in the model, is for the user to complete the given task within Edivate with mastery and on time.

Apply

The application phase is where the user will apply what they have learned using the Edivate platform. As Administrators and leaders, celebrate and acknowledge the accomplishment. Work with those that need additional guidance based on system data and applied application.

Monitor and Control (Monitor)

Edivate Admin Tool Reporting Options

To track progress to completion of Edivate SMART goals, the following is a list of reports available in Edivate:

- *Usage Totals with Graphs* A summary report of usage containing charts and graphs.
- *Users Summary Report* A summary report containing user activity totals. Not displayed in Edivate, but sent to an email address that you supply.
- *Users Detail Report* A detailed report containing all user activity by video segment including answers to reflection and follow-up questions. Not displayed in Edivate, but sent to an email address that you supply.
- *Individual User Detail Report* A report on individual user activity.
- *Comprehensive Usage Report* A summary listing all users within a school and their Edivate activity.
- *User List* Displays a list of login names and email addresses for all users in a location.
- *Schools/Site Usage Totals* A summary list with data of registered users including minutes, programs, and number of segments viewed.
- *Content Summary Report* A summary of video programs and segments viewed.
- *Focus Objectives Report* Displays user data concerning viewing and completion of focus objectives.
- *Credit Report* Displays user's earned credit by video segment.
- *Achievement Summary Report* Displays user's achievement points broken down by category. Note: This is a legacy report displaying data found in PD 360 but not Edivate.
- *Achievement Individual Detail Report* Displays user's achievement points by category. Note: This is a legacy report displaying data found in PD 360 but not Edivate.
- *Training Courses Report* Get the status of training course tasks by school.

To access these reports, the user must be designated as an Edivate Administrator and have access to Edivate's Admin Tool feature.

Edivate Observe Reporting Options

The following is a list of reports available in Edivate Observe:

- The *Observations by Template Report* displays full observations submitted on a given template.
- The *Observation Status Report* displays a summary of all scheduled, in progress, and completed observations as well as educators who have not been observed.
- The *Detailed PD Status Report* displays all professional development assigned as a result of an observation. It also includes the completion status of that professional development.
- The *Proficiency Trend Report* displays, for a given educator, a summary of observed data in completed observations for an overall template and each section.

Edivate Course Reports

The following is a list of Edivate Course reports available:

- *Course Detail Report* This report lists course tasks, task status, and the task completion date for each course participant.
- *Course Summary Report* This report lists all of the participants in the course as well as each participant's school, district, state, course status, and course completion date.
- *Individual Course Report* You select the participant for whom you want to run the report. The report lists all of the tasks, question responses, feedback, task completion status, and task completion date for the participant you select.

To access these reports, the user must be a course facilitator or administrator.

Edivate Group Reports

The following is a list of Edivate Group reports available:

- *Group Summary Report:* This report lists all the members of the group and their membership date, as well as the number of completed tasks, posts, uploads, and resources contributed to the group. In addition, the report lists the group resources and files, and who uploaded them.
- *Individual Task Report:* This report lists the tasks and completion dates for the group member you select.
- *Video Upload Report:* This report lists all of the members of the group who have uploaded videos to Edivate Review. Videos are listed by group member, date uploaded, and title.
- *Video Feedback Report:* This report lists all of the feedback associated with each video, including: video title, group member name, date, and specific feedback.

To access these reports, the user must be a group leader.

Edivate Catalog Reports

The following is a list of Edivate Catalog Transcript reports available:

- *Personal Transcript:* This report lists all completed catalog units. This report can be found in the Personal Reports location of the Homepage.
- *School Transcript:* This reports lists all completed catalog units per user at the school level. This report can be found in Admin Tools dropdown.

Personal Edivate Reports

The following is a list of Edivate Personal reports available:

- *Usage Report:* This report lists all of the content you have viewed by program and segment between the dates you specify. In addition, it also lists the timestamp of how much of the content you have viewed, when you last viewed it, and your answers to the Reflection and Follow-up questions.
- *Course Report:* This report lists your progress in the course for which you run the report. You can generate this report for any courses for which you have registered or been assigned in the system. The report lists the dates you viewed each section of the course, the tasks associated with the course, your current status on each task, as well as the date you completed each task.
- *Catalog Transcript:* This transcript lists all Catalog units (e.g., courses, trainings, etc.) you have registered for and/or completed as well as the credit value associated with each unit. Signature lines are included for providing documentation for professional development credit.
- *Micro-Credential Report:* This report lists all in-progress and completed micro-credentials you have participated in. It also shows the required competencies associated with each micro-credential as well as the date they were completed.

Reflecting on Edivate Goals

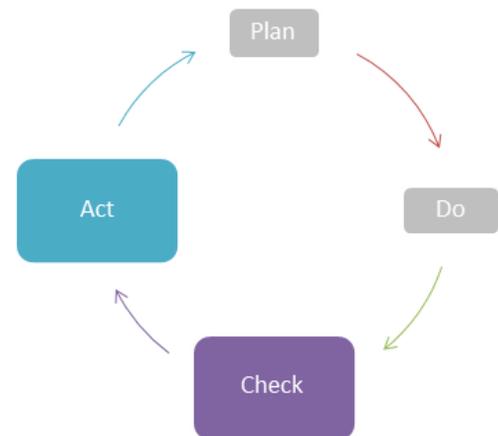
The Cycle of Continuous Improvement

Plan: Create your implementation goals

Do: Go Live with implementation goals

Check: Use data reports to review progress towards goals

Act: Revise goals for continuous implementation progress



Closing

Closing the Year with Edivate

Focus Objectives

- Review active Focus Objective Folders for alignment to upcoming school year objectives
- Toggle off any folders no longer applicable to district initiatives
- Activate new Focus Objectives aligned to upcoming school year objectives

Courses

- Expire all active courses
- Reset course window dates for the upcoming school year

Catalogs

- Archive all school year specific professional development
- Prepare content for the upcoming school year

Observations

- Review templates needing possible adjustment
- Submit template adjustment requests to School Improvement Network
- August-Review and assign template user management privileges based on building assignments

Based on the Edivate license contract end date, contact your Strategic Partner Advisor for a renewal quote. Best practice is to initiate this at least 90 days prior to license expiration.

Upgrading the Edivate Service Package

If during the course of the school year with Edivate, additional services are needed outside of the current contract, contact your Strategic Partner Advisor for a quote and next steps.

To find a list of available Edivate services for purchase, including training, visit the Edivate Implementation Group found here: <https://www.edivate.com/#groups/320222>

Appendix

Edivate Administrator Checklist

Use the following checklist to track progress to completion for all Edivate administrative duties as referenced in the Edivate Administrative Guide.

Initiation and Setup

Suggested timeframe for completion: 10-15 days

- Define and document the Edivate System Administrator and Edivate Project Leads
- Review Edivate technical specifications and insure compliance
- Ensure Network Administrator has:
 - Whitelisted Public IP Addresses
 - Allow access inside your network to provided address
 - Verify email spam filter does not block provided address
- Locate the contact information for Edivate Technical Support

Planning

Suggested timeframe for completion: 10-20 days

- Locate and bookmark in your browser the *Edivate Implementation Group*
- Develop an implementation plan using the *Edivate Implementation Plan* resource
- Complete and submit the *Edivate User List* template to support@edivate.com
- As applicable, complete and submit the *Training Request Form* to support@edivate.com
- Locate *Edivate Distance Learning* resources and include plans for using in your *Edivate Implementation Plan*

Monitoring

Suggested timeframe for completion: Monthly or Quarterly

- Run and analyze select Edivate reports to track Edivate SMART goal progress
- Utilize *The Cycle of Continuous Improvement* to modify your implementation goals and timeline as needed

Closing

Suggested timeframe for completion: In the last 30-60 days of implementation

- Complete Edivate resource yearly closing activities (Focus Objective Folders, Courses, Catalogs, and Observations)
- Review end of year data and develop an implementation plan draft for the new year.
- Contact Strategic Partner Advisor (Sales Representative) for renewal quote