



CATHOLIC EDUCATION
WESTERN AUSTRALIA

ADMINISTRATION OF SCHOOLS DEPLOYMENT GUIDE

A HANDBOOK FOR PRINCIPALS, FINANCE AND ADMINISTRATION MANAGERS

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AUDIENCE

Principals, Finance and
Administration Managers

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Document Control and Review

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Welcome to AoS

The Administration of Schools (AoS) platform is designed to bring together each school's core administrative capabilities into a single, user-friendly platform that's constantly maintained. Built on Dynamics 365, AoS integrates specialised capabilities for finance and student management - with the tools you use every day.

This allows for simplified interfaces, automated workflows and reduces the burden of manual tasks. AoS provides centralised capabilities with local flexibility, so schools can benefit from continual updates and improvements.

The outcome is a highly secure and configurable administration hub, built for a truly connected Catholic Education Western Australia (CEWA) community.

For more information about the individual AoS Modules head to our dedicated website with all of the latest information and resources – aos.cewa.edu.au

Security and Privacy

CEWA is committed to the security, safety and privacy of all staff and students. The LEADing Lights platform has been built with security as a central priority and is compliant with all relevant government and CECWA policy. The platform is cloud-based and stored on secure systems, using best-in-class digital information protection. In addition, Microsoft cloud solutions has been assessed against the Australian Government Information Security Registered Assessors Program (IRAP), which ensures your school has appropriate and effective security controls built into the LEADing Lights platform.

As part of the migration, you will be required to make and send copies of your existing financial and administrative data. We understand that this data is highly sensitive and confidential, and the data will not be used or viewed in any capacity not related to your school's migration to the Admin of Schools platform. All data will be communicated through secure and privatised channels, with permissions and access strictly limited and based solely on necessity.

No-one from CEWA will be reviewing the data for any other purpose, and hands-on contact will be minimal due to process automation, and most prepared data will be directly imported into the AoS system.

Your school will be supported by an AoS migration team member through your adoption journey. As you progress through each phase of preparing your data to full implementation, we will ensure your specific needs are met and questions answered along the way.

Our AoS migration team will do most of the heavy lifting of migrating your data across to the new AoS system. Only a handful of staff at your school will be impacted by the migration, and there are clear checklists of what has to be done by when in order to ensure a smooth and successful transition.

Roles and Responsibilities

What do my teams need to do?

These key staff will be responsible for driving AoS adoption within the school, undertaking the critical tasks of cleansing financial and administrative data, and completing the School Readiness Checklist.

Principal

Role: Lead by example, support the rollout plan however possible

Key Tasks: Coordinate migration dates with CEWA and school leadership teams, allocate AoS 'champions', assign roles and ensure accountability. Review each step of the transition and participate in go/no-go checkpoint sessions

Admin Leader

Role: Manage the administrative side of the adoption phases

Key Tasks: Preparing and cleansing administrative data, carrying out post-migration checks and completing all assigned tasks on each checklist

Finance Manager

Role: Manage all financial aspects of the adoption phases

Key Tasks: Preparing and cleansing financial data (i.e. running checks and balances), carrying out post-migration checks and completing all assigned tasks on each checklist

IT Leader

Role: Delivering backed-up data to CEWA, supporting Admin and Finance Managers where required

Key Tasks: Coordinating with AoS migration team to ensure a smooth transition, creating and sending data backups, providing further support after migration as required

What will CEWA teams do?

CEWA representatives will aid and support to staff in order to prepare you for migration and adoption, including coordinating training and providing resources and guides.

AoS Liaison

The key touchpoint between CEWA and school migration teams. A CEWA representative will undertake an initial meeting to guide you through the adoption journey and provide you with important documents and resources. This may be in-person or via a dedicated Teams channel.

AoS Training Teams

A team of AoS experts have created online and offline training resources for each user group. Training will include webinars, online resources, in-person tutorials, small group virtual sessions (Teams, Skype) and more. It will be delivered in 'learning clusters' based on a specific users' role within each school. Advanced guides and topic-specific tutorials (ie EOFY reporting) will be made available throughout the year. Some examples of training resources are already available for review on aos.cewa.edu.au.

Resource & Support Channels

(R) – Resource

All documents, resources and training materials can be accessed via our AoS transition portal aos.cewa.edu.au

(S) - Support

We'll try to have as many resources as possible available for you to manage the adoption journey yourselves, but there's also plenty of ways to get in touch with the LEADing Lights team throughout when you need some additional support.

Microsoft Teams (S) (R)

A dedicated *AoS Migration Team* will be created for each school in order to coordinate and communicate with their school-side adoption team and AoS liaison. In addition, the *IT Community Team* will be able to share resources, advice and learnings from early migrations in order to refine process for later schools.

On-site visits (S) (R)

Depending on when your school is migrating and the size of your finance and administration database, your AoS Liaison will visit your school to meet with the leadership team and plan your adoption.

Service Now (S)

This is an online *IT support portal* to log technical queries if you're unable to find the answers online. Using a ticketed system, your query will be logged and answered as soon as possible.

AoS website (R)

An online resource centre for the latest news, updates and guides. There will also be a series of searchable FAQs housed here, which will continue to be updated during the rollout.

Claned (R)

Digital training modules and resources will be shared on Claned and other channels, so staff can learn more about the adoption process.

Adoption Journey

The Admin of Schools Adoption is broken up into four distinct phases, describing the key activities your school will need to undertake; **Plan, Prepare, Migrate and Enable** (see Appendix A).

During the **Plan** phase, each school receives a set of resources to begin planning for their migration approach, commence early training phases and begin interacting with a test platform. This stage is estimated to last 2-4 weeks, though the timeframe may vary by school. This can also start at any time, regardless of when your migration date is set.

Within 4 weeks of your migration date, you will need to commence the **Prepare** phase. This is where the critical data and planning preparations for migration begin. Your school adoption team will be responsible for completing the *School Readiness* and *Data Cleanse Checklists* which will ready your school's administrative and financial data for migration. This phase is expected to take 4-8 weeks, depending on the complexity and scale of pre-AoS systems. It is also important not to start this phase until you're within the recommended 4-6 week window away from migration, to save you needing to repeat any tasks.

We next commence the **Migrate** phase. With the assistance of your IT Leaders, the AoS Migration team will extract data from your current systems through an automated process – transitioning it to a secure ‘intermediary’ platform. This data will then be thoroughly checked and validated, before final system checks are undertaken (by both CEWA and your teams) and deployed.

From here, your school proceeds to the **Enable** phase where Maze date will be set to ‘read only’ and you’re underway in Dynamics 365. Your staff will have access to a range of support channels, resources, and searchable documentation to help them adjust to the new platform. Schools will also be able to access more advanced Admin of Schools training, empowering staff to get the most out of the new system.

Checkpoint

Throughout the adoption journey, there will be several Checkpoints where LEADing Lights requires confirmation that a specific task has been completed. The migration process cannot process until all checkpoints have been signed off by the relevant school leader/Principal.

1. Plan

1.1 Planning for your migration date

The AoS Migration team will reach out to your school leadership team to begin walking you through the process. This will be an in-person meeting, via phone, or through your AoS Team. Your liaison will explain what the migration process will look like for you – including the estimated timeframes, important procedural shifts to consider and who should be included in your school’s deployment team. They’ll explain the resources and documents that will guide you (particularly in the preparation phase) and recommend available support channels so you can begin assigning tasks and preparing to migrate right away.

The CEWA team will be migrating schools in 'clusters' based on their location. This will allow a staggered rollout by each school, so individual data can be closely monitored during every migration stage. Your AoS liaison will advise you of your recommended migration date when you meet with them. They will also discuss any potential migration barriers or 'exclusion dates'. These are dates or events where you're most reliant on your pre-AoS systems (such as parent-teacher conference time, budget planning period or new enrolments). The preparation phase is critical to the success of the rollout – so you will so you will have the chance to review and confirm any potential exclusion dates before proceeding to the migration phase.

Key Action – Select your potential migration dates and inform all relevant staff.

1.2 Program Cost & Resourcing

Your Migration team will provide you with a transition plan and a *School Readiness Checklist* to brief you on migration requirements and required planning. Depending on the size and complexity of your school's pre-AoS systems, the time required of your staff will depend on the volume and 'cleanness' of your current data – as well as the familiarity of your staff with these preparation processes.

Smaller schools may have less data, therefore requiring less time to get it ready to migrate. However, Administration and Finance leaders within each school will still need to dedicate time in addition to business-as-usual activities in order to adequately prepare and receive training. If these roles are filled by part-time staff (or staff are filling more than one role within your school) leadership may need to increase the allocated preparation time, particularly in the data cleansing and de-duplication stages.

On the IT side, the time commitment will be relatively low, and your school's IT team or partner will simply need to be briefed on the required work in advance. Their main role is to work with the CEWA AoS migration team as we transition your data. Their main role is to perform the backup and transfer of data to CEWA's secure server, as we check your data is working in the new system as expected.

Key Action – Ensure your existing teams are aware of the time they will need to allocate to perform their adoption tasks.

1.3 Finance and Administration Audit

Your school will need to conduct a thorough audit of your current finance and administration configurations. Different schools will have varied combinations of infrastructure, such as uniform shop or canteen Point-of-Sale systems. The Migration team will then review this audit and identify any additional planning required for systems which may be impacted.

1.4 Lock-in Migration Dates

Having now considered the resource and business requirements of your school's migration process, you will now need to confirm when you will commence preparation - including system lock-downs and final migration date.

If your school's schedule and anticipated preparation processes cannot be viably completed by the elected date, you may need to consider an alternative migration date as required. In order to provide every school with the attention to detail required for successful migration, there is a limit to how many schools can be migrated in certain timeframes, so you will need to consult your CEWA liaison to determine your next viable migration date.

Key Action – Select your migration date and inform you internal teams and AoS liaison.

Checkpoint

Once your plan is confirmed, it's time to commence the preparation stage.

2. Prepare

2.1 Introduction to Admin of Schools – Training

Training will be made available in multiple platforms and formats, including webinars, online resources, in-person tutorials, small group virtual sessions (i.e. Teams, Skype) and more. Training will be delivered in 'learning clusters' based on a specific users' role (i.e. Finance Manager) within each school, ensuring they'll be able to understand how to perform their daily tasks.

Training will be phased so you aren't overloaded with too much information upfront. Advanced, seasonal (i.e. EOFY reporting) and topic-based training will also be rolled out over the year, so users can select training options best suited to their needs at a specific time of year - once they're familiar with the basics.

More detail on your school's training plan will be made available once your migration date is secured. In the meantime, resources will continue to be uploaded to the *AoS website*, *LEADing Lights website* and via your AoS Microsoft Team.

Key Action – All relevant team members need to complete the 'Intro to AoS' training at a minimum.

2.2 Role Group Definition

As part of the migration plan, a key part will be to work with you to determine key roles in your school, access rights and permissions. This will need to be tailored to each school, pending your organisational structure, roles and resources. Key considerations will be enhanced collaboration and productivity balanced with privacy, risks and best practice models being adopted across the CEWA network.

Key Action – The leadership team of each school will need to define key roles, access rules and permissions for the new platform with guidance from your AoS liaison and IT.

2.3 AoS System Preview & Testing

Following introductory AoS training, Finance and Administration staff will gain access to an interactive AoS test environment loaded with 'dummy' content. Users can begin to familiarise and experiment with the platform, understand how to interact with the systems, and update any existing business process documentation or technical documents accordingly. You will also receive a *comprehensive list of testing tasks* or 'scripts' to complete. This will help to familiarise users with the execution of a variety of common administrative and financial processes – and ensure the platform is working as expected.

Once these tasks have been completed, staff should be familiar with the new functions and steps to complete tasks.

Key Action – Complete System Preview Checklist and inform your AoS Liaison

2.4 Data Cleanse and De-Duplication

Many schools are using different systems and methods to store their financial data.

For example, the AoS platform requires a basic class student list - including a students' first name, last name, date of birth, emergency contact number and relationship. However, this information may exist in multiple or disparate locations within a school's current database. The data cleanse is one of the most important steps in the preparation phase, where data is 'cleaned', exported and organised into a format (such as excel / CSV) that can be imported directly into the AoS system. It's really important to get the column structure correct – to ensure you have a clear, accessible set of data when you start working on your new system.

Depending on the size of your school and the complexity of the systems currently in use, the length of this process will vary.

We will provide a comprehensive checklist and *step-by-step guide* to the data cleanse and de-duplication process. The guide will provide specific instructions on how to extract key information, where it should be migrated - and what to do if support is required. The responsible staff need to ensure each step is followed closely and data is completely cleansed and de-duplicated. This will save a lot of time and effort for everyone involved in the process. You may want to consider enlisting a third party (ie your IT lead) to review and verify the completion of each step of the data cleanse checklist.

Once the data cleanse and de-duplication process is complete, your school's IT lead will package up your data for LEADing Lights to ensure it's been accurately cleansed. A migration and integration expert from LEADing Lights will be assigned to each school to oversee the migration process and review your 'ready to go' data.

Key Action – Complete *Data Cleanse & De-Duplication Checklist* and inform your AoS Liaison

2.5 Finalise School Readiness Checklist

The *School Readiness Checklist* is designed to ensure you've completed all the tasks required to move on to the migration stage. Some tasks will be very simple, while others will require more time and resources to finalise.

2.6 Complete User Testing Review Checklist

The User Testing review checklist ensures that your school's key staff are able to complete their essential duties at an acceptable standard using the new system. A preliminary test migration will allow you to continue testing and exploring the new system using your school's data.

2.7 Choose Portal Rollout Approach

As part of the Admin of Schools rollout and associated change management process, your school will also need to think about the launch of the Teacher Portal. This is where student data from the new AoS system will surface, simplifying student management and admin tasks for teachers through easy access to tools for marking, attendance and reporting.

As the Portal functionality depends on the data within your Admin of Schools platform, you will have the option of switching to both systems at the same time, or staging your Portal's rollout to later in the year.

Rolling out both simultaneously will allow your school to immediately access the full benefits of the complete LEADing Lights platform. While some internal change management will be required to adjust to two new systems in a short time frame, a dual rollout will simplify your transition plans, and allow you to retire older platforms such as SEQTA earlier.

You will be able to discuss your options with your CEWA liaison, and how each approach may fit with your school's strategy.

Checkpoint

The following checklists must be completed before moving to the next phase,

- System Preview
- Data Cleanse
- School Readiness

When these steps are complete, your school should now be ready for migration. Once the Readiness Checklist has been signed off by school leaders and sent to your AoS liaison – they will reconfirm your migration time and approach for your elected date. They will also document any opinions and feedback you may have had about the process, so we can continue to improve the process for others.

At this stage, your IT leader will assemble and compress backups of your financial and administrative databases, as well as the cleansed and de-duplicated data. This is transferred digitally to CEWA, where the AoS migration team will process the data into the new AoS platform.

Key Action – IT lead backs up all MAZE (or other relevant system) data and sends it to LEADing Lights.

3. Migrate

3.1 Reconfirm Migration Timeframe

Reconfirm your migration date and time with your Migration team and map out your school's lockdown period with all impacted team members. As your existing system cannot be used during this time, you will need to prepare for a system lockdown with no further data being entered. The CEWA IT team will (either remotely or in-person) manage your data migration. Depending on your school's data and the volume of schools transitioning at the same time. Your school Finance and Admin teams will also need to be on standby during the time of migration to help manage potential data queries.

3.2 Go Live

AoS is now live and accessible! Once the CEWA IT teams have loaded your school data into the new platform and your permissions are set up, you can start using the system right away. It's important to start the post-migration checks as soon as possible once AoS is live.

3.3 Post Migration Checks

CEWA will provide you with a series of post-migration tasks / checks to ensure data migration was successful and the AoS system is performing as expected. Any issues will need to be reported to your AoS liaison as soon as possible, so CEWA's IT team can determine the cause of the discrepancy.

Checkpoint

Once you have verified school data has been migrated, you are free to begin using the Admin of Schools platform in your school and proceed to the **Enable** stage.

4. Enable

4.1 Advanced AoS Training

Advanced AoS training will be available for specific functions and tools, as well as seasonal activities. The advanced training will allow you to explore some of the deeper functionality of Admin of Schools, including the intelligent analytics and custom reporting features.

Appendix A

ADOPTION JOURNEY for Administration of Schools (AoS)

While everyone's AoS adoption journey will look different depending on their existing systems, finance and administration data and internal resources - there's some key steps that most schools will need to complete in order to transition seamlessly and successfully to the new AoS system. This guide below is for Principals, Finance and Administration leaders.

