Pearson System of Courses

Self Service Implementation Checklist

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Implementation Overview

The purpose of this document is to guide your district, who is new to Pearson System of Courses, through the process of implementing this software product with minimal assistance from Pearson. This guide is intended to be used as a high level resource in the form of a checklist of activities, that are either required or optional, in order to deploy the product.

The following pages contain a checklist of items that need to be considered and/or completed to ensure that the product is deployed properly. This will help guide the district towards a successful start to using this digital curriculum for their teachers and students. In addition to the checklist, there is a more detailed listing of each checklist item to explain the purpose of these activities, why they are required or recommended, and what impact they may have if not completed.

Please review this guide as you begin your implementation of Pearson System of Courses.We hope you will find it helpful when using the **Self Service** implementation. If you have any feedback on this document, please send that to our team at psctech@pearson.com.

Thanks and welcome to Pearson System of Courses!

Implementation Checklist

The following checklist items are a high-level list of tasks that are required or recommended to complete the Pearson System of Courses (PSC) implementation with success. The district can print this page or copy this list to another shared document to help their team track the status of these items.

If additional details or explanations are needed as to the purpose and/or impact of any specific item, please see the Implementation Checklist Detailed section later in this document that explains each of these items with additional information.

☑	District has received and reviewed the feedback from the Technical Readiness Assessments, and is aware of any potential areas that need to be monitored or action taken.
☑	District has reviewed and meets the PSC Technical Requirements.
☑	District has clearly provided a list of PSC content/curriculum (subjects and grades) they plan to use with PSC.
☑	District has reviewed and implemented the whitelist of PSC URLs, if applicable to their network infrastructure, as detailed in the PSC Whitelist URLs.
☑	District has completed the one-time Kick Off meeting with the Pearson PSC Implementation team to review the planned implementation, team contacts, and technical information.
☑	District has completed the roster data discovery meeting with the Pearson team, and received the needed data specifications and sample roster files.
☑	District has provided their initial Student Information System rostering files to Pearson.
☑	District has completed the setup and automation of sending their Student Information System rostering files to Pearson on a daily basis.
☑	District has worked with the Pearson team to understand and select one of the available authentication methods to be used with PSC.
☑	District has been provided access to the App and Content for PSC by Pearson.
☑	District has received their customer Configuration Code for PSC from Pearson.
☑	District has selected a process to deploy the PSC App, Content, and Configuration Code by reviewing the high-level Provision and Deployment overview and the Deployment Matrix.
☑	District has selected and reviewed a specific and detailed Deployment Guide for their device-specific operating system(s).
☑	District has completed a test deployment of the PSC App, Content, and Configuration Code to a sample number of devices.
☑	District has completed **Device Validation** for a sample of devices per the Validation Guide.

✅	District has fully deployed the PSC App, Content, and Configuration Code to all planned PSC user devices.
✅	District has completed their New Year Rollover (NYR) Process in the Student Information System and informed Pearson of this change (if applicable at the time of implementation).
✅	District curriculum administrator or teachers have worked with Pearson to identify Courses and their matching Curriculum that will need to be configured by Pearson for their PSC classes.
✅	District has completed **User Validation** for a sample of devices per the [Validation Guide]().
✅	District has allocated and tested devices in advance of any on-site Professional Development training being provided by Pearson or the District.
✅	District has reviewed the end-user PSC app startup and login process, and is prepared to provide guidance or instructions to users in regards to what actions or expectations they should have when using the PSC app for the first time.
✅	District has provided user credentials, or has a process to have these provided to users, so they will be ready to log in to PSC.
✅	District has a schedule and plan for all schools and classrooms that will be using PSC for the first time, and is ready to support their users.
✅	District has reviewed the [Day In the Life](), [User Guides](), and [Release Notes]() documents, and made these available to all of the district and school curriculum, teacher, and support staff as needed.
✅	District has received contact information from Pearson for obtaining support for PSC during the initial implementation from the PSC Implementation team, and beyond from the Pearson Technical Support group.

Implementation Checklist Detailed

The checklist below is an identical list of the activities in the above checklist for implementing Pearson System of Courses (PSC). The difference here is additional information is provided for each checklist item. These additional details will provide more information regarding the purpose of each item, why it is needed, and the impact of the item if it is not completed.

☑	**Activity:** District has received and reviewed the feedback from the Technical Readiness Assessments, and is aware of any potential areas that need to be monitored or action taken. **Purpose:** This activity is needed to ensure all of the technical readiness concerns (if any) are known to the district. These items may require action or monitoring so they do not impact the user experience for deploying or using PSC. **Impact:** For items that do not meet the PSC technical standards, the district may not be able to proceed with implementing PSC. For items that are partially met, considerations may need to be taken during deployment to accommodate any items identified. For example, if peak bandwidth is limited, then concurrent device downloading of content may need to be limited to a smaller number of devices.
☑	**Activity:** District has reviewed and meets the PSC <u>Technical Requirements</u>. **Purpose:** This activity is needed to ensure that the district is aware of and has reviewed the technical requirements for the initial implementation and any future device or infrastructure changes. **Impact:** For items that do not meet the PSC technical requirements, the district may not be able to proceed with implementing PSC or may need to adjust their plans. For example, obtaining the compatible client devices or adjusting their network to ensure a good experience for device deployment and day to day use of PSC.
☑	**Activity:** District has clearly provided a list of PSC content/curriculum (subjects and grades) they plan to use with PSC. **Purpose:** This activity is needed to ensure that Pearson will provide all of the Grade and Subject content that will be needed by the district for all planned PSC classrooms, including any needs for students who may access content for lower/higher grade levels outside of the scheduled PSC class. **Impact:** For any grades or subjects that are needed but not initially requested by the district, these can be added later, but there could be a delay of 1-2 weeks to get those in place.
☑	**Activity:** District has reviewed and implemented the whitelist of PSC URLs, if applicable to their network infrastructure, as detailed in the <u>PSC Whitelist URLs</u>. **Purpose:** This activity is needed to ensure that all functionality in the PSC app will work as expected. **Impact:** If the district is filtering websites and the needed PSC URLs are not whitelisted, access may be prevented for some functions in the PSC app. Features that may not work if URLs are blocked when users begin to use the app are: log in, content download, notebook sharing, exercises, assessments or reports.
☑	**Activity:** District has completed the one-time Kick Off meeting with the Pearson PSC Implementation team to review the planned implementation, team contacts, and technical information.

	Purpose: This activity is needed to introduce and document the District and Pearson team members who will be involved in the implementation. Also, an overview of the implementation and other technical information will be provided to kick-off the implementation tasks needed to be completed by both teams. **Impact:** This meeting is needed to relay contact points and implementation details for the deployment of PSC and will help get the implementation off to a quick start. If this meeting is not completed, there may be confusion with the people or tasks involved to move the implementation forward quickly.
✔	**Activity:** District has completed the roster data discovery meeting with the Pearson team, and received the needed data specifications and sample roster files. **Purpose:** This activity is needed to ensure that Pearson reviews the required data needed from the Student Information System with the district, and has time to answer any questions for the customer so they can proceed with the data extract setup and delivery. **Impact:** This meeting reviews the detailed requirements of the needed roster data files and format in order to kick start the process of providing the data to Pearson. This meeting can be skipped if the district is familiar with these processes and has no questions on the process.
✔	**Activity:** District has provided their initial Student Information System rostering files to Pearson. **Purpose:** This activity is needed to ensure that Pearson received the required Student Information System roster data so it can be validated and loaded well before the district plans to start using PSC. **Impact:** Since this data is needed to create the roster database for students, teachers, and classes, it is an important and required element for PSC. Without this data provided in the correct format, users will not be able to log in or may not be associated with sectioned classes.
✔	**Activity:** District has completed the setup and automation of sending their Student Information System rostering files to Pearson on a daily basis. **Purpose:** This activity is needed to ensure that new teachers, new students, and schedule changes are provided to the PSC roster database so that new users can log in and that class enrollment changes are reflected for the teachers and students on future log ins. **Impact:** If regular roster updates are not provided, then Student Information System data will become stale over time, prevent access for new users, and cause students to appear in incorrect classes as student movements occur in the district.
✔	**Activity:** District has worked with the Pearson team to understand and select one of the available authentication methods to be used with PSC. **Purpose:** This activity is needed to ensure that the district is aware of the options available and has made a selection of an authentication method. Once this activity is completed Pearson will move forward with the setup and configuration of the authentication process. **Impact:** If an authentication selection is not made or delayed, users will not be able to log in to PSC once all components are in place, or the ability to log in may be delayed.
✔	**Activity:** District has been provided access to the App and Content for PSC by Pearson. **Purpose:** This activity is needed to ensure that the district can move forward with the automated or manual setup of PSC devices. **Impact:** Like the Configuration Code, these components are also required items for any district device to use of PSC. Pearson will work to coordinate their efforts to ensure all of these components are provided to the district on or around the same time.
✔	**Activity:** District has received their customer Configuration Code for PSC from Pearson.

	Purpose: This activity is needed to ensure that the district can move forward with the automated or manual setup of PSC devices. **Impact:** The Configuration Code is a required configuration for any district device to allow the user to log in and use PSC. Deployment should be not tested or initiated without this code.
☑	**Activity:** District has selected a process to deploy the PSC App, Content, and Configuration Code by reviewing the high-level [Provision and Deployment](#) overview and the [Deployment Matrix](#). **Purpose:** This activity is needed to ensure that the district is aware of the documentation Pearson has created to inform them of the high-level and summary processes that they need to plan for deployment of the PSC components. **Impact:** If the district is not familiar with the options available for deploying PSC to devices, they may not select the best deployment method for their district based on devices, platforms, or tools, and the deployment process may take longer to complete.
☑	**Activity:** District has selected and reviewed a specific and detailed [Deployment Guide](#) for their device-specific operating system(s). **Purpose:** This activity is needed to ensure that the district is aware of the documentation Pearson has created to guide them through a detailed deployment process for the most common tools and deployment methods, to plan for deployment of the PSC components. **Impact:** If the district is not familiar with the detailed process for deploying PSC to devices, they may miss or skip some of the steps that help make the process as simple and error free as possible. Any issues that arise may need additional time or effort to resolve, if devices need to be redeployed or touched again.
☑	**Activity:** District has completed a test deployment of the PSC App, Content, and Configuration Code to a sample number of devices. **Purpose:** This activity is needed to ensure that the district is able to deploy the three main components of PSC, and test their tools and processes before deploying to all users and devices. **Impact:** This process is a practice run to ensure the district has a chance to become familiar with the PSC components and work through any issues with deployment. If this process is not completed, the district may not be aware of any potential issues or concerns when completing a larger deployment, which may cost additional time or effort if devices need to be redeployed or touched again.
☑	**Activity:** District has completed **Device Validation** for a sample of devices per the [Validation Guide](#). **Purpose:** This activity is needed to ensure that the district has completed the device deployment process successfully. This will also inform the district on how to check and verify a number of PSC components that can be useful in later support efforts. **Impact:** This process is a check to ensure the deployment of the planned PSC components is successful and that the expected items are in place prior to user access. If this process is not completed, the district may not be aware of any potential issues or concerns when completing a larger deployment, which may cost additional time or effort if devices need to be redeployed or touched again.
☑	**Activity:** District has fully deployed the PSC App, Content, and Configuration Code to all planned PSC user devices. **Purpose:** This activity is needed to ensure that all devices have been identified, configured, and are ready for users to access PSC. **Impact:** If the deployment is not completed for all devices, users may struggle when attempting to use PSC for the first time if some devices in a classroom or in a school are not available or were not considered during the deployment process.

☑	**Activity:** District has completed their New Year Rollover (NYR) Process in the Student Information System and informed Pearson of this change (if applicable at the time of implementation). **Purpose:** This activity is needed to ensure that Pearson is aware of the standard NYR process and when this will happen for the district, typically between school years. During this time, the regular data loading process is paused to perform additional data validation for the change in the data set of the new school year, and to ensure that any issues are resolved before moving to the new school year in PSC. **Impact:** This process is needed to ensure a clean transition from one school year to another. If Pearson is not aware of this change, data issues may arise that could delay implementation. Additionally, Pearson will need to complete a similar NYR process in the roster database and will need to coordinate this change after the district NYR process.
☑	**Activity:** District curriculum administrator or teachers have worked with Pearson to identify Courses and their matching Curriculum that will need to be configured by Pearson for their PSC classes. **Purpose:** This activity is needed to ensure that district courses identified to be used with PSC are configured by the Pearson team. Pearson will initiate this process with the district and ask them to specify which courses they will be using with PSC, and which subject and grade level content will be provided to the users of that course. **Impact:** If this process is not completed, PSC teachers and students will be able to log in, but they will not receive the normal Dashboard landing page, and will not be able to function as a classroom. Pearson will typically make a default assignment for pertinent courses, and in this situation, users may function normally, but may not have the correct or preferred grade level content.
☑	**Activity:** District has completed **User Validation** for a sample of devices per the [Validation Guide](). **Purpose:** This activity is needed to ensure that the district and Pearson have completed the data loading and NYR processes successfully. This validation process will help to ensure devices are ready, users are able to log in, and users are able to see their Dashboard, which indicates they are properly rostered in the correct classes. **Impact:** This process is a check to ensure once again that the deployment is successful, and more importantly that all of the data setup and NYR processes are complete, and that the users will be successful when they attempt to log in and use PSC for the first time. If this process is not completed, the district may not be aware of any potential issues or concerns when students and teachers begin using PSC, which may cost additional time or effort if login or data issues need to be resolved during class time.
☑	**Activity:** District has allocated and tested devices in advance of any on-site Professional Development training being provided by Pearson or the District. **Purpose:** This activity is needed to ensure that district devices planned to be used during any on-site training events are allocated, prepared, and tested in advance of a scheduled training event. **Impact:** If devices are not allocated or prepared in advance, users that plan to attend class with the assumption that they will be provided a device may not have one during training, or they may plan to bring their own device, which may not be set up properly (incorrect app version, Configuration Code, or content). Any of these issues may cause delays in users being able to access PSC and follow along with the training class.
☑	**Activity:** District has reviewed the end-user PSC app startup and login process, and is prepared to provide guidance or instructions to users in regards to what actions or expectations they should have when using the PSC app for the first time. **Purpose**: This activity is needed to ensure that teachers and students are aware of any

actions they will need to complete when starting the PSC app for the first time. For example, users may need to select the content directory (Windows), or users may need to install the app manually from the App Store, or they may be required by the district to download content during and after log in.

Impact: If users are not aware of the actions they need to take when starting the app for the first time, this could result in users selecting the wrong option or not being able to get started with PSC, which may result in support calls in order to get them started.

✅	**Activity:** District has provided user credentials, or has a process to have these provided to users, so they will be ready to log in to PSC. **Purpose**: This activity is needed to ensure that users have been provided their username and password in order to log in to PSC. There are different options for how PSC users can authenticate, so it is best to plan ahead and be sure they know what credentials they will be using. **Impact**: If users are not provided credentials or are using the wrong login information, they will not be able to log in and access PSC.
✅	**Activity:** District has a schedule and plan for all schools and classrooms that will be using PSC for the first time, and is ready to support their users. **Purpose**: This activity is needed to ensure that the district support staff is ready for the initial usage of PSC by students and teachers, and that a plan is in place for how teachers will receive support, and how the district and Pearson will work together to quickly resolve issues if they arise. **Impact**: If there is no plan for how users will be supported, they will typically follow the usual district process, which may be insufficient. With PSC, the device and curriculum may be the core material of the class, so resolving hardware, configuration, or data issues quickly is desired to ensure all users have a good experience and make the most efficient use of class time.
✅	**Activity:** District has reviewed the [Day In the Life](#), [User Guides](#), and [Release Notes](#) documents, and made these available to all of the district and school curriculum, teacher, and support staff as needed. **Purpose**: This activity is needed to ensure that the district is aware of these user documents, and that they are empowering their users by making them available to all PSC users as needed, in addition to their support staff. **Impact**: These documents will provide and inform users with a high-level overview of the PSC app usage, how to navigate and use all functions in the app, and provide a list of changes and features from the latest app release. By using these documents, users will become familiar with and better able to use the PSC app, and reduce the number of support calls needed to the district support team.
✅	**Activity:** District has received contact information from Pearson for obtaining support for PSC during the initial implementation from the PSC Implementation team, and beyond from the Pearson Technical Support group. **Purpose**: This activity is needed to ensure that the district has clear contacts for obtaining support. During the implementation window, the PSC implementation team will be the primary contacts for providing support or answering questions. After this window, the PSC implementation team will provide the district with contacts for the Pearson Technical Support team. **Impact**: This activity is important so that the district has a clear path of communication to Pearson, to ensure that they are able to make contact, to work through any issues during implementation, and resolve any problems that arise in the future.