Core Ed-Fi v2.0 Setup Checklist [.2231 - .2327]

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Tool Search: Ed-Fi

Use this checklist of Ed-Fi tasks to verify you have entered, selected and saved appropriate options for reporting data through Ed-Fi.

Done	Task	UI Location
	Turn Ed-Fi 'ON' via the Enable Ed-Fi system preference.	System Administration > Preferences > System Preferences > Enable Ed-Fi
	Set tool rights for Ed-Fi.	System Administration > User Security > Users/User Groups > Tool Rights
	Make a valid connection to Ed-Fi via the Connection Configuration tool.	System Administration> Ed-Fi> Tools> Ed-Fi Configuration
	Set all Resources to 'Off' and map the Ed-Fi Codes to Campus Codes via the Resource Preferences.	System Administration> Ed-Fi> Tools> Ed-Fi Configuration
	Add a Room to all Course Sections for state-reporting courses.	Scheduling > Courses > Course > Sections > Sections
	Set the Title, Type and Assignment Code fields for all school staff that need to report.	Census > People > District Assignments
	Add a Teacher Role on Staff History for teachers who need to report to Ed-Fi.	Scheduling > Courses > Course > Section > Section Staff History
	Assign Ed-Fi IDs.	Census > People > Demographics > Person Identifiers
	Toggle Resources to 'On' in Resource Preferences. once all data setup is complete.	System Administration> Ed-Fi> Tools> Ed-Fi Configuration
	Resync Ed-Fi Data (see the Recommended Sync Order section for guidance on when to sync which resource)	System Administration > Ed-Fi > Ed-Fi Tools

Recommended Sync Order v2.0

#	Category	Resources
1	Education Organization Information	Schools
2	Grade Information	Grading Periods
	Schedule Information	Calendar Date
		Class Periods
		Locations
		Sessions
3	Schedule Information	Courses
		Course Offerings
		Sections
	Staff Information	Staffs
		Staff Education Organization Assignment Associations
		Staff School Associations
	Student Information	Students
		Graduation Plans
		Student Education Organization Associations
		Student School Associations
		Assessments
		Student Assessments
		Programs
		Student Program Association
		Student Special Education Program Association
		Student Title I TAS Program Association
4	Parent Information	Parents
		Student Parent Association
	Schedule Information	Staff Section Associations
		Student Section Associations

#	Category	Resources
5	Attendance Information	Student School Attendance Events
		Student Section Attendance Events
	Grade Information	Course Transcripts
		Student Academic Records
		Grades
	Discipline Information	Discipline Incident
		Student Discipline Incident Association
		Discipline Action
	Cohort Information	Cohorts
		Student Cohort Associations
		Staff Cohort Associations