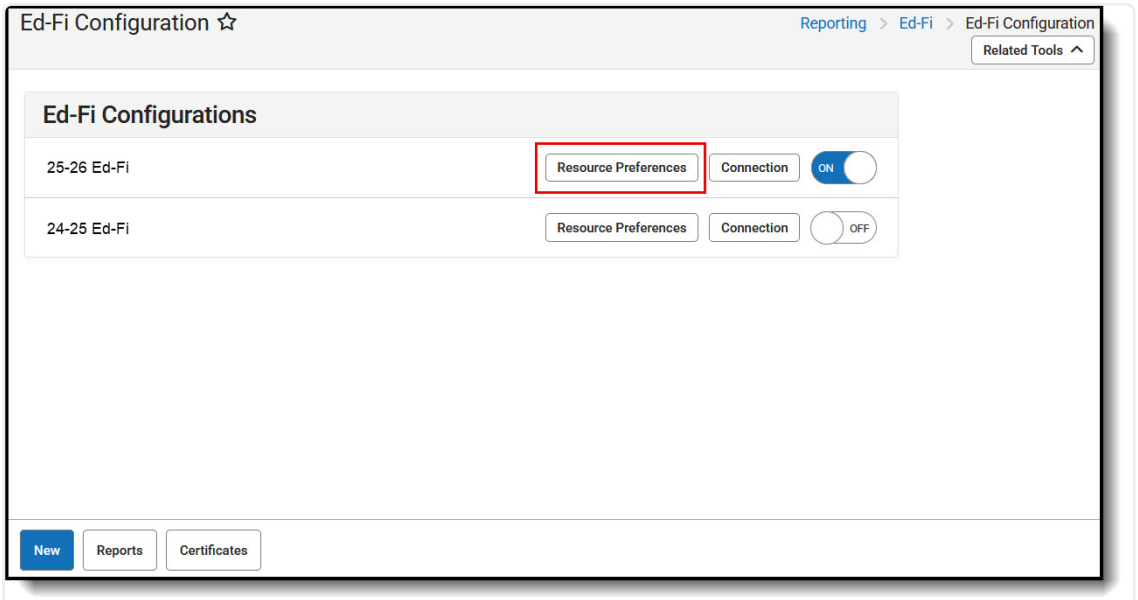
Ed-Fi v3.X - Set Resource Preferences

Last Modified on 10/14/2026 1:03 pm CDT

Tool Search: Ed-Fi Configuration

Resource Preferences determine which information is sent to Ed-Fi. These options apply to all schools within the district. If the state did not request a resource, it does not appear in this list, meaning different options may be available for different states. Some mapping screens may be 'read only' if specific business rules are required by your state.

Once Resource Preferences have been selected, a valid configuration is made and Ed-Fi ID's are assigned to users, data will flow properly from Campus to Ed-Fi.



Ed-Fi Configurations

For more information about Ed-Fi Configuration Tool Rights and how they function, see this Ed-Fi Tool Rights article.

Prerequisites

- Ed-Fi functionality must be enabled via the Enable Ed-Fi System Preference.
- Ed-Fi should be properly configured via the Ed-Fi Configuration tool.

Ed-Fi Mapping Management tool for Resource

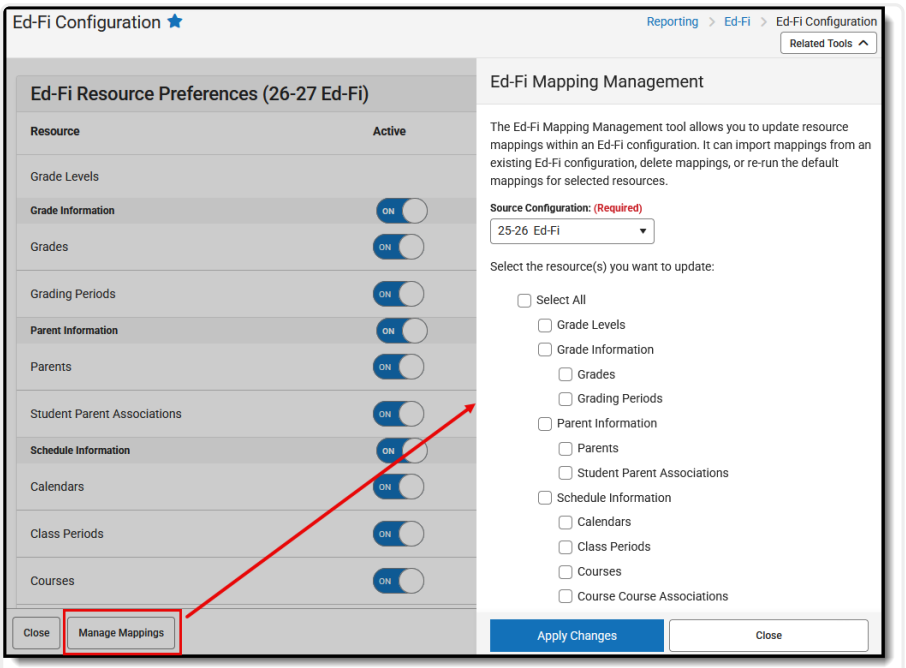
Preferences

The Ed-Fi Mapping Management tool allows you to update resource mappings within an Ed-Fi configuration. It can import mappings from an existing Ed-Fi configuration, delete mappings, or restore the default mappings for selected resources.

Note: For mappings of the following resources, the general rule to roll forward these mappings is that the 'rolled forward' data must be 1:1 with the previous year:

- Calendars
- Class Periods
- Grades
- Grading Periods
- Graduation Plans
- Sessions
- Student Assessments

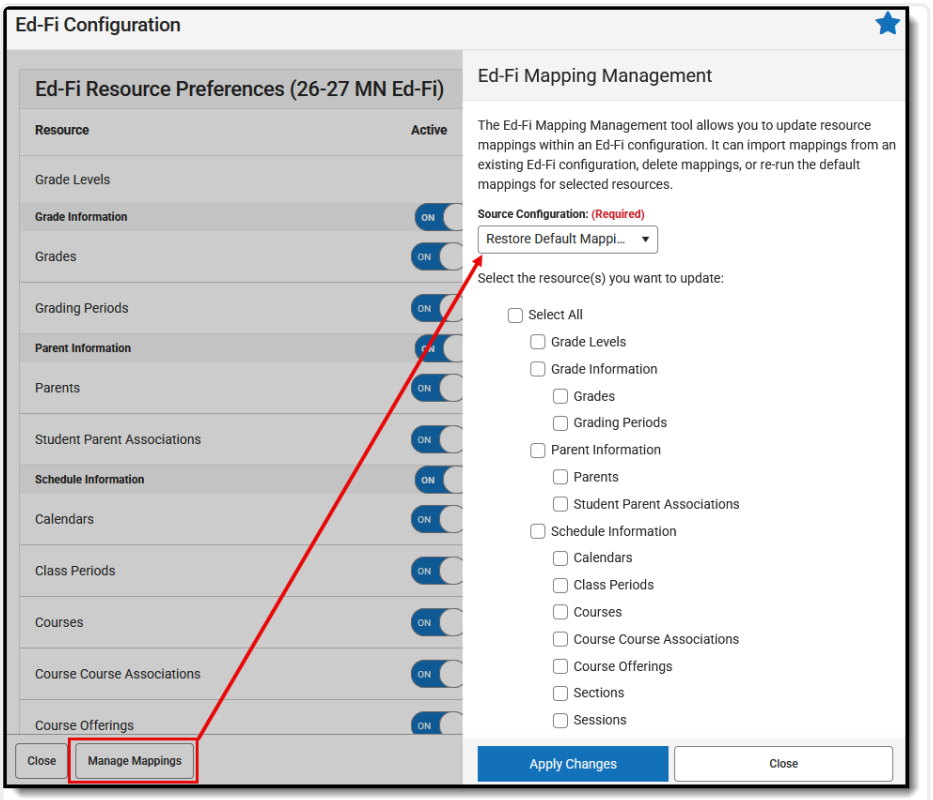
To import mappings from an existing Ed-Fi configuration:



Import Mappings

1. Navigate to the Resource Preferences for the configuration in which the mappings will be imported.
2. Click the **Manage Mappings** button.
3. Select the **Source Configuration** from which mappings will be imported.
4. Select the **Resources** to import mappings from.
5. Click **Apply Changes.** This action overwrites any existing Resource Preferences mappings entered in the current configuration for the selected resources**.**
6. The imported mappings can be viewed by selecting the **Edit** or **Config** button next to the resource.
7. Resources should be toggled off until all data setup is complete and the district is ready to send data to Ed-Fi.

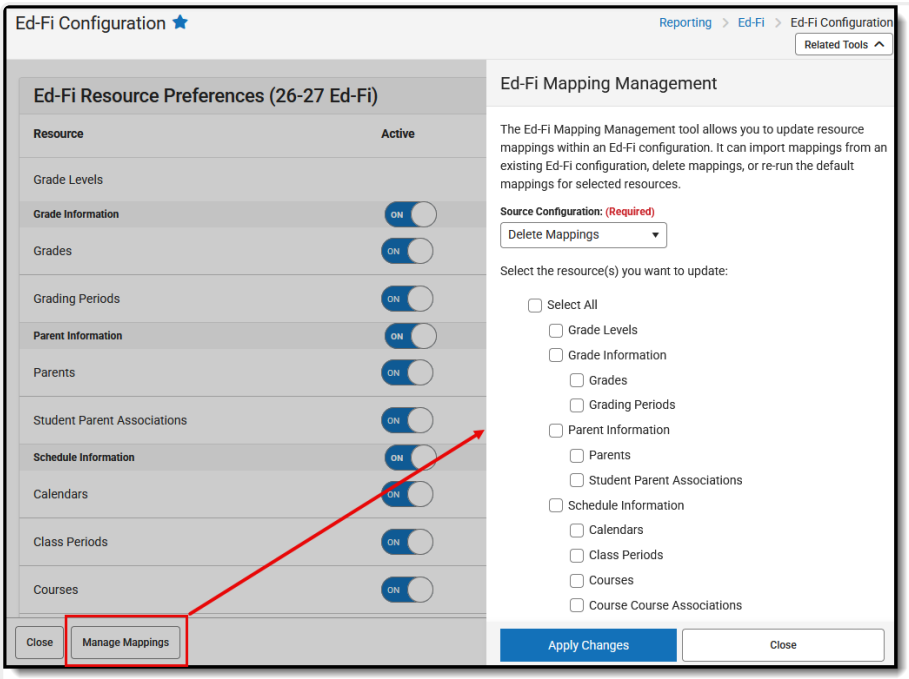
To restore the default mappings for an Ed-Fi configuration:



Restore Default Mappings

1. Navigate to the Resource Preferences for the configuration in which the mappings will be restored.
2. Click the **Manage Mappings** button.
3. In the **Source Configuration** droplist, select **Restore Default Mappings**.
4. Select the **Resources** for which the mappings will be restored.
5. Click **Apply Changes.** This action overwrites any existing Resource Preferences mappings entered in the current configuration for the selected resources**.**
6. The updated mappings can be viewed by selecting the **Edit** or **Config** button next to the resource.

To delete resource mappings:



Delete Mappings

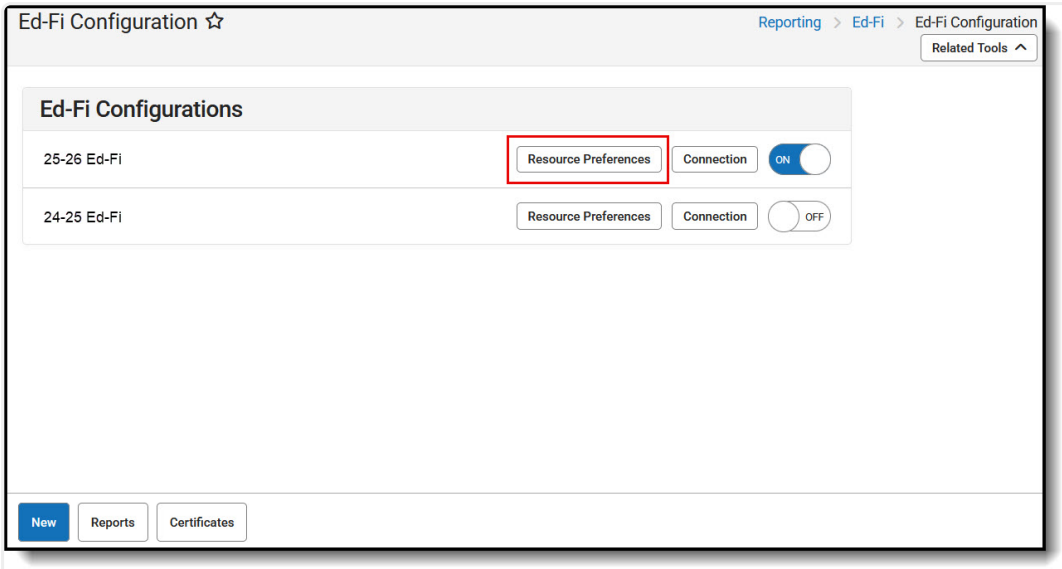
1. Navigate to the Resource Preferences for the configuration in which the mappings will be deleted.
2. Click the **Manage Mappings** button.
3. Select **Delete Mappings** in the **Source Configuration** field.
4. Select the **Resources** to delete mappings from.
5. Click **Apply Changes.** This action deletes all mappings from the database for the selected resource(s).

Manually Set Resource Preferences

To manually set Resource Preferences:

> Resources should be toggled off until all data setup is complete and the district is ready to send data to Ed-Fi.

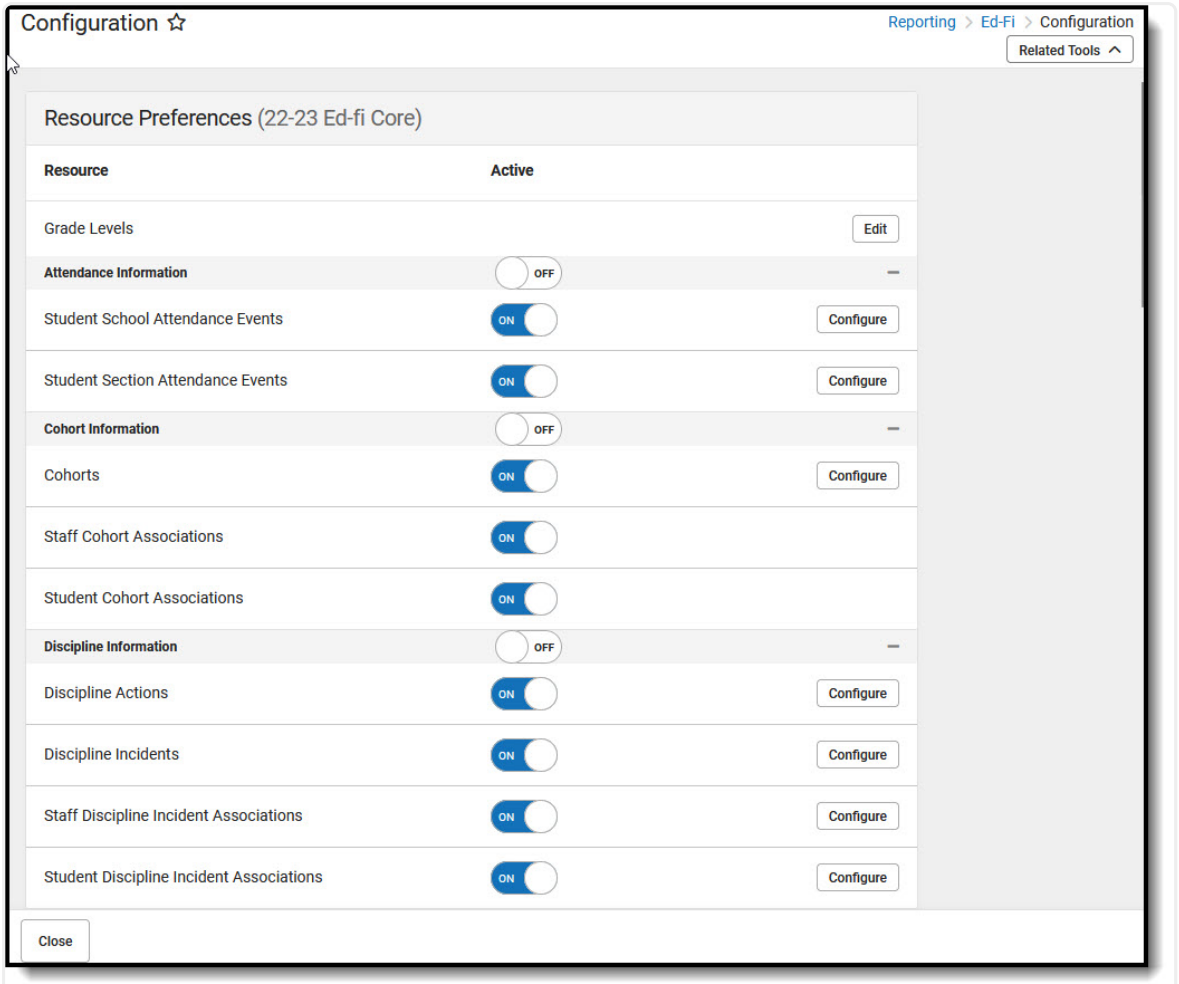
1. Select the **Resource Preferences** button.



Ed-Fi Resource Preferences

2. Click the **Edit** or **Configure** button to modify the resource preferences. Configure displays if preferences have not previously been saved. Edit displays when preferences have already been set and saved. Resources can be expanded by clicking the "+" sign or collapsed by clicking the " - " sign.

   If the Configure or Edit button do not display, then the resource does not need to be mapped and the toggle button can be used to turn the resource on or off.



Resource Preferences

3. Set the mappings for the appropriate Resource Preferences.
   Note: Resources will vary by state.
4. Resources should be toggled off until all data setup is complete and the district is ready to send data to Ed-Fi.