Wisconsin General Ed-Fi Setup Checklist

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[General Ed-Fi Checklist](#)

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General Ed-Fi Checklist

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
	Enable Ed-Fi functionality via the Enable Ed-Fi system preference.	System Settings > System Preferences > Enable Ed-Fi
	Enter Connection Configuration, and ensure a **Profile** value is selected.	Reporting > Ed-Fi > Configuration > Connection
	Set tool rights for Ed-Fi.	User Management > User Groups > Tool Rights
	Set all Resources to 'Off' and map the Ed-Fi Codes to Campus Codes via the Resource Preferences. For the 2020-21 school year, do not configure the Course Transcripts resource until a notification has been sent to configure it.	Reporting > Ed-Fi > Configuration > Connection Config
	Assign Ed-Fi IDs.	Demographics > Person Identifiers
	Enter District Agency Key for reporting Ed-Fi District Numbers.	School & District Settings > District Information
	Enter School Agency Key for reporting Ed-Fi School Numbers on the School Editor.	School & District Settings > School Information

Done	Task	UI Location
	Toggle Resources to 'On' in Resource Preferences once all data setup is complete. For the 2020-21 school year, do not turn on the Course Transcripts resource until a notification has been sent to turn it on.	Reporting > Ed-Fi > Configuration > Connection Config
	Resync Ed-Fi Data (see the Recommended Sync Order for guidance on when to sync which resource).	Reporting > Ed-Fi > Resync