

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
	<p>Toggle Resources to 'On' in Resource Preferences once all data setup is complete.</p> <div style="background-color: #fff9c4; padding: 5px; margin-top: 10px;"> <p>For the 2020-21 school year, do not turn on the Course Transcripts resource until a notification has been sent to turn it on.</p> </div>	<p>Reporting > Ed-Fi > Configuration > Connection Config</p>
	<p>Resync Ed-Fi Data (see the Recommended Sync Order for guidance on when to sync which resource).</p>	<p>Reporting > Ed-Fi > Resync</p>