

New Mexico Ed-Fi Checklist for Starting the 2023-2024 School Year

Last Modified on 01/22/2026 3:43 pm CST

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Tool Search: Ed-Fi

This article describes the steps you should take in order to properly move Ed-Fi to the 2023-2024 school year. This article also contains general recommendations for processes to complete at the end of the school year and beginning of the school year.

Step 1. Update to the most recent version of Campus

In order to have the schema and logic in place, it is critical you update to the most recent version of Campus. **Failure to do this will result in an inability to properly report data for the current school year.**

Step 2. Enable Ed-Fi functionality

Enable Ed-Fi functionality via the Enable Ed-Fi system preference in System Preferences > Enable Ed-Fi.

- **Yes** = Ed-Fi functionality is enabled and Ed-Fi data will sync from Campus to the Ed-Fi system (if properly enabled via Ed-Fi Configuration tools).
- **Tools Only** = You are able to fill out Ed-Fi fields (such as Ed-Fi ID) within Campus but this data will not sync to the Ed-Fi system until this field is set to Yes. This is especially useful when setting up Ed-Fi IDs for students within a school or district so that data properly syncs between Campus and Ed-Fi prior to enabling it.
- **No** = Ed-Fi functionality is not enabled for the district and users cannot access Ed-Fi tools within Campus.

System Preferences ☆
System Settings > System Preferences > System Preferences

Save

Assignment

Batch Queue Expiration Days
5
Automatically delete batch queue jobs older than this many days or leave blank to never delete.

Autopay Fees with Surplus Balance
Yes

Auto Post Course Fees
Yes

Days to Flag Roster Additions
5
Students added to a section will appear on rosters in green text for the specified number of days.

NGA Cohort Years after NCLB
1

Enable Ed-Fi
Yes

User access to the new look of Campus (Try New Look)
All Users

Display Fifth Year EL Monitoring
Yes

Cascade Enrollment End Date to Blended Learning Group Assignment End Date
Yes

Birth Date required for Student Locator
No

System Preferences

Step 3. Create a New Ed-Fi Configuration for 2023-2024

You will need to create a new Ed-Fi configuration for the 2023-2024 school year.

Connection Detail (23-24)

Ed-Fi Connection Type *

State

Connection Name *

23-24

School Year *

23-24 ▼

OAuth URL *

https://edfi.ped.state.nm.us/v5.3.0_NM_Production/api

API URL *

https://edfi.ped.state.nm.us/v5.3.0_NM_Production/api

Post-Amble *

/data/v3/

Timeout in Seconds *

60

Connection Credentials

Add Multiple Credentials

Turn this feature on if more than 1 Key and Secret is required for this School Year.

☐ OFF

Client Key *

Client Secret *

Test Connection

Ed-Fi Configuration

To do this:

1. Navigate to the Ed-Fi Connection Configuration tool (Ed-Fi > Configuration > Connection).
2. Select **New**.
3. Select the **Connection Type**, options are Core or State.
4. Enter a **Connection Name**.
5. Select a **School Year**.
6. Enter the following values:

Field	Value
Ed-Fi Connection Type	State
O-Auth URL	https://edfi.ped.state.nm.us/v5.3.0_NM_Production/api
API URL	https://edfi.ped.state.nm.us/v5.3.0_NM_Production/api
Post-Amble	/data/v3/
Timeout in Seconds	This field defaults to a value of 60 seconds and determines (in seconds) the amount of time allowed to pass before the connection between Campus and Ed-Fi is considered timed out and Ed-Fi events are not processed. These Ed-Fi events are then re-processed the next time a quartz job runs.
Client Key	The Client Key will be provided by the New Mexico Department of Education.
Client Secret	The Client Secret will be provided by the New Mexico Department of Education.

7. If desired, a certificate can be imported for the Ed-Fi configuration. For more information, please see the **'Import Certificates'** section of the [Ed-Fi Configuration article](#).
8. Click the **Save** button.

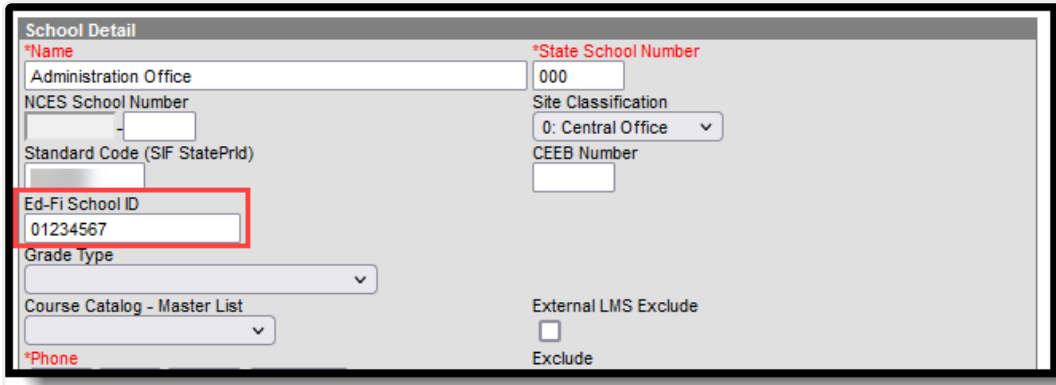
Step 4. Set Ed-Fi Tool Rights

Set the Ed-Fi Tool Rights via User Management > User Accounts > Tool Rights.

Review the [Ed-Fi Tool Rights article](#) for more information.

Step 5. Add Ed-Fi School ID

In order to send data in Ed-Fi, the 'School' needs an Ed-Fi School ID. For the Administration Office, enter the District Entity ID in the Ed-Fi School ID field if not previously done.



School Detail

*Name: Administration Office

*State School Number: 000

NCES School Number: [empty]

Site Classification: 0: Central Office

Standard Code (SIF StatePrid): [empty]

CEEB Number: [empty]

Ed-Fi School ID: 01234567

Grade Type: [empty]

Course Catalog - Master List: [empty]

*Phone: [empty]

External LMS Exclude: ☐

Exclude: [empty]

School Detail

Step 6. Set Resource Preferences

Set all Resources to 'Off' and map the Ed-Fi Codes to Campus Codes via the Resource Preferences in Ed-Fi > Configuration > Resource Preferences. Some Resource Preferences are auto-mapped and do not need to be set. For more information on Resource Preferences, please see the [Resource Preferences article](#).

Step 7. Toggle Resource Preferences to On


Toggle Resources to 'On' in Resource Preferences in Ed-Fi > Configuration > Resource Preferences once all data setup is complete. For more information, please see the [Resource Preferences article](#).

Step 8. Perform an Ed-Fi Resync for the Scope Year

Now that the Ed-Fi configuration is in place and data has been properly reviewed, an ordered resync should be completed as the first resync of the year. This is completed using the Resync tool.

For detailed information about this process, please see the [Resync \(Ed-Fi\) article](#). Resyncing will generate a large volume of items in your event queue, so it may be helpful to plan your resync for an off-peak time period and resync in groups of calendars rather than all calendars.

Resync ☆
Reporting > Ed-Fi > Resync
Related Tools ^


Start Resync

Select an Ed-Fi Configuration and Schools to resync data. If a resync is needed for specific people, enter the Campus Person ID's of the records to resync. When more than one person's records should be resynced, separate the ID's with a line break, comma or space. If running for specific people, non-person-related resources and attendance will not resync. **Warning**For best performance, run one school at a time as running the Resync Tool sends large amounts of data.

Ed-Fi Configuration
23-24 School Year

School(s)
Choose School(s)

All Schools
☐

Campus Person ID(s)

All People
☒

Campus Course ID(s)

All Courses
☒

Campus Section ID(s)

All Sections
☒

☐ Select Dependencies

☐ Attendance Information

☐ Discipline Information

☐ Grade Information

☐ Parent Information

☐ Schedule Information

☐ Staff Information

☐ Student Information

Grayed out resource checkboxes indicate a resync is already in progress for that School & Resource Combination.

Resync

To do this:

1. Navigate to the Resync tool (*Reporting > Ed-Fi > Resync*).
2. Select the appropriate **Configuration**.
3. Select the resources to resync.

Campus highly recommends using the order of resync detailed on the [New Mexico Recommended Resync Page](#).

4. Once data sets have been marked and you are ready to resync, select the **Start Resync** button.

Step 9. Review the Event Queue.

Navigate to the Event Queue (*Reporting > Ed-Fi > Event Queue*). Wait until all records have processed in the Event Queue (when it reads "0 records total" as seen below). Once there are no events in the Event Queue, turn off all Resource Preferences.

Event Queue ☆ Reporting > Ed-Fi > Event Queue Related Tools ^

Refresh Process Now

Event Queue (0 records total)					
Queue Order	Action Type	Campus Table / Resource Name	Old Data	New Data	Currently Processing
<div> « 1 / 1 » </div>					

Ed-Fi Event Queue

Step 10. Review the Error Log

Navigate to the Error Log ([Reporting > Ed-Fi > Error Log](#)). Review the Error Log and note any errors that exist. When you feel like you've addressed all of the underlying causes for the errors, click "Archive All Entries" on the Error Log tab (which will remove them from the list) and return to **Step 8**, retrying the resync of data.

Error Log ☆ Reporting > Ed-Fi > Error Log

Filter

Resource/Table Error Type Person School Configuration Details

Resource Name / Campus Table Name	Count
No records available.	

Archive Selected Entries
Retry Selected Entries
Export to CSV

Ed-Fi Error Log.

Beginning of New School Year

For a general (not Ed-Fi specific) checklist of activities that should be performed within Campus at the beginning of a new school year, please see the [Beginning of School Year Process article](#).