Arizona Ed-Fi Setup Checklist

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Classic View: System Administration > Ed-Fi

Search Terms: 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.

> For more information about setting up Special Ed Plans so that they properly report to Ed-Fi, see the Setting Up Arizona SPED Plans for Use in Ed-Fi article.

> As of Release Pack .1749, students are no longer required to have an Ed-Fi ID in order for new enrollment records to be created.

Task	UI Location
Enable Ed-Fi functionality via the Enable Ed-Fi system preference.	System Administration > Preferences > System Preferences > Enable Ed-Fi
Enter Connection Configuration.	System Administration > Ed-Fi > 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 > Ed-Fi Configuration > Resource Preferences
Set tool rights for Ed-Fi.	System Administration > User Security > Users/User Groups > Tool Rights
Set Days Per Week value on all reportable calendars.	System Administration > Calendar > Calendar > Calendar
Set Calendar Dates on all reportable calendars • Instructional Days report based on the Instruction checkbox on each date; all other events report from the Day Events droplist dictionary values	System Administration > Calendar > Calendar > Days
Set Term Descriptor Override on Course Sections.	Scheduling > Courses > Course > Sections > Sections

Task	UI Location
Set the Ed-Fi Relation Type.	System Administration > Census > Relationship Type
Set the Ed-Fi Transcript Term Override for all manually added transcripts.	Student Information > General > Transcripts > New > Ed-Fi Transcript Term Override
Add a Room to all Course Sections for state-reporting courses.	Scheduling > Courses > Course > Sections > Sections
Add an Instruction Setting on Course Sections.	Scheduling > Courses > Course > Sections > Sections
Add a Level to a Course, if applicable.	Scheduling > Courses > Course
Assign Ed-Fi IDs.	Census > People > Demographics > Person Identifiers
Add a Teacher Role on Staff History for teachers who need to report to Ed-Fi.	Scheduling > Courses > Course > Section > Section Staff History
Toggle Resources to 'On' in Resource Preferences once all data setup is complete	System Administration > Ed-Fi > Ed-Fi Configuration > Resource Preferences

Recommended Sync Order

Ed-Fi v3.X

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.

#	Category	Resources
1	Schedule Information	Calendars
2	Schedule Information	Class Periods
		Locations
		Sessions
		Calendar Dates

#	Category	Resources
3	Schedule Information	Course Offerings
		Sections
	Staff Information	Staffs
		Staff Education Organization Assignment Associations
	Student Information	Students
		Student School Associations
		Student Education Organization Associations
		Student Education Organization Responsibility Associations
		Student Needs
		Student Program Associations
		Student Special Education Program Associations
4	Parent Information	Parents
		Student Parent Associations
	Schedule Information	Staff Section Associations
		Student Section Associations
	Grade Information	Course Transcripts
		Student Academic Record
5	Attendance Information	Student School Attendance Events
		Student Program Attendance Events
6	Discipline Information **Note:** The Discipline resources are only available in Ed-Fi version 3.5.3 and beyond.	Discipline Actions
		Discipline Incidents
		Student Discipline Incidents Associations
		Student Discipline Incident Behavior Associations

Ed-Fi v2.0

#	Category	Resources
1	Schedule Information	Tracks

#	Category	Resources
2	Grade Information	Grading Periods
	Schedule Information	Class Periods
		Locations
		Sessions
		Calendar Date Track Events
3	Schedule Information	Course Offerings
		Sections
	Staff Information	Staffs
		Staff Education Organization Assignment Associations
		Staff Education Organization Employment Associations
	Student Information	Students
		Student School Associations
		Student Education Organization Associations
		Student Needs
		Student Program Associations
		Student School Association Membership FTEs
		Student School Association Special Enrollments
		Student School Association Tuition Payers
		Student Special Education Program Associations
4	Parent Information	Parents
		Student Parent Associations
	Schedule Information	Staff Section Associations
		Student Section Associations
	Grade Information	Course Transcripts
		Student Academic Record
5	Attendance Information	Student School Attendance Events
		Student Program Attendance Events