



# ED-FI SETUP FOR 2018

2018 USER GROUP

# CHECKLIST – COURSE LENGTH SETS

- Any Take Subset – Yes & any Type – Normal need a State Term Code attached.
- Needs to be done per ENTITY

The screenshot shows the 'Course Length Sets (137)' interface. It includes a 'Course Length Set Details' section with the following information:

- Default Earned Credits: 1.000
- Default GPA Credits: 1.000
- Default Academic Hours: 1.000
- Use Control Set Dates in place of Grading Period dates in Gradebook: No
- Use Cumulative Grading in Gradebook: No

Below this is a 'Class Control Sets' table with the following columns: Dep Lit, Description, State Term Code, Type, Terms, Take Subset, Start and End Dates, Add Subset, T1, T2, T3, T4. The 'Type', 'Terms', and 'Take Subset' columns are highlighted with red boxes in the original image.

Dep Lit	Description	State Term Code	Type	Terms	Take Subset	Start and End Dates	Add Subset	T1	T2	T3	T4
Edit Delete	YR YEAR	YR	Normal	01-04		07/24/17-05/24/18	Add Subset	1	1	2	2
Edit Delete	S1Y SEMESTER 1	S1	Subset	01-02	Yes	07/24/17-12/15/17		1	1		
Edit Delete	S2Y SEMESTER 2	S2	Subset	03-04	Yes	01/03/18-05/24/18				2	2
Edit Delete	T1Y TERM 1	Q1	Subset	01-01	Yes	07/24/17-09/29/17		1			
Edit Delete	T2Y TERM 2	Q2	Subset	02-02	Yes	10/16/17-12/15/17			1		
Edit Delete	T3Y TERM 3	Q3	Subset	03-03	Yes	01/03/18-03/09/18				2	
Edit Delete	T4Y TERM 4	Q4	Subset	04-04	Yes	03/26/18-05/24/18					2

# CHECKLIST – RELATIONSHIP CODES

- Edit the Relationship Code to assign the Ed-Fi Relationship Type
- Or use the Auto Assign Ed-Fi Codes
  - Any Relationship Code that already has an Ed-Fi code will not be modified.
  - The export will pull 'Other' if no Relation Type exists



Relationship Codes (142)

Views: General Filters: \*Skyward Default

Code	ST Code	Short Description	Long Description	Ed-Fi Relation Type
A	10	AUNT	AUNT	Aunt
AP	01	ADOPTIVE PARENT	ADOPTIVE PARENTS	
BRO	08	BROTHER	BROTHER	Brother
C	10	COUSIN	COUSIN	Cousin
DCS		Case Manager	DCS Case Manager	
F	03	FATHER	FATHER	Father
FOS	07	FOSTER PARENT(S)	FOSTER PARENT(S)	Foster parent
FRI	11	FRIEND(S)	FRIEND(S)	Friend
FSM	14	FATHER AND STEP	FATHER AND STEP MOTHER	
G	06	GRANDPARENTS	GRANDPARENTS	
GF	06	GRANDFATHER	GRANDFATHER	Grandfather
GM	06	GRANDMOTHER	GRANDMOTHER	Grandmother
GP	06	GRANDPARENTS	GRANDPARENTS	
GUA	39	GUARDIAN(S)	GUARDIAN(S)	
M	02	MOTHER	MOTHER	Mother
MSF	15	MOTHER AND STEP	MOTHER AND STEP FATHER	
OR		DoNotUse	Do Not Use	
OTH		OTHER RELATIVE	OTHER RELATIVE	
P	01	PARENTS	PARENTS	
PF	03	PARENT-FATHER	PARENT-FATHER	Father

Auto Assign Ed-Fi Codes

20 records displayed

# CHECKLIST – ENTRY CODES

- This will pull as the Entry Type in the StudentEnrollment Interchange.
- This is a district wide code table and only needs to be done once.
- The Ed-Fi Entry Types match the State Enrollment Reasons.
- These will clone year to year, but if you add new codes these will need to be crosswalked

Entry Codes (132)

Views: General Filters: \*Active Entry Codes

Code	Short Description	Long Description	Entry Type	Status*	State Enrollment Reason	Ed-Fi Entry
E	Entry Code (E)	Entry Code (E)	F = First Time	Active	E	E
E1	Entry Code (E1)	Entry Code (E1)		Active	E1	E1
ECV	Entry Code (ECV)	Entry Code (ECV)		Active	EC	EC
IE	Entry Code (IE)	Entry Code (IE)		Active		
TC	Transfer to Ano	Transfer to Another School Due		Active	TR	TR
TR	Entry Code (TR)	Entry Code (TR)		Active	TR	TR

Entry Code Maintenance (119)

Entry Code:

\* Short Description:

\* Long Description:

Entry Type:

**Ed-Fi Entry Type:**

State Enrollment Reason:

Status:

# CHECKLIST – WITHDRAWAL CODES

- Can use the Auto Assign Ed-Fi Code Button to assign these codes.
- This will pull as the ExitWithdrawalType in the StudentEnrollment Interchange.
- Please note there are no Ed-Fi Withdrawal Codes for 16 or 17, but there are Promoted, Detained & Retained.

The screenshot displays two windows from a software application. The top window, titled "Withdrawal Codes (169)", shows a table of active withdrawal codes. The bottom window, titled "Withdrawal Code Maintenance (155)", shows the configuration for a specific withdrawal code (00).

Code	Short Description	Long Description	Status*	Start Year	Stop Year	State Withdrawal Reason	Type	Ed-Fi Type
00	Withdrawal Code	Withdrawal Code (00)	Active	0000	0000	00	O	00
01	Withdrawal Code	Withdrawal Code (01)	Active	0000	0000	01	O	01
02	Withdrawal Code	Withdrawal Code (02)	Active	0000	0000	02	O	02
03	Withdrawal Code	Withdrawal Code (03)	Active	0000	0000	03	O	03

The "Withdrawal Code Maintenance (155)" window shows the following fields:

- Withdrawal Code: 00
- \* Short Description: Withdrawal Code (00)
- \* Long Description: Withdrawal Code (00)
- Withdrawal Type: 0 - Out of District
- Ed-Fi Withdrawal Type: 00 - Dropout, under 18
- State Withdrawal Reason: 00 - Dropout, under 18
- Status: 01 - Dropout, 18 and over
- Start Year: 02 - Withdrawn to state
- Stop Year: 03 - Transferred to other Tennessee school system, 04 - Transferred to other school in same system, 05 - Transferred out of state, 06 - Transferred to non-public school in Tennessee, 07 - Doctor certified withdrawal, 08 - Deceased, 09 - Deleted, 10 - Withdrawn to a home school; Pre-K withdrawn per parent request, 11 - Court Order, 12 - Graduation prior to spring, 13 - Permanent dismissal from Tennessee's voluntary pre-k program, 15 - TEIS transition, not eligible for special education services, D - Demoted, P - Promoted, R - Retained

# CHECKLIST – OFFENSE CODES

- Crosswalk the Ed-Fi Behavior Codes
- If the Ed-Fi Code is blank, the correct value will be send based on the State Offence Code, where possible
- State Codes 17-20, 35 = Ed-Fi Code 01
- State Codes 21-34 = Ed-Fi Code 02

Offense Codes (182)

Views: General Filters: \*Active Offense Codes

Code ▲	Long Description	Status*	Severity	Default Action	State Code	Ed-Fi Behavior
▶ 001	Cell Phone violation		1		24	02
▶ 17	Drugs - Zero Tolerance		1		17	01
▶ 18	Handgun - Zero Tolerance		1		18	01
▶ 19	Rifle/shotgun - Zero Tolerance		1		19	01

Offense Codes (124)

Offense Code: 001

\* Short Description: Cell Phone

\* Long Description: Cell Phone violation

Severity: 1

Status:  Active  Inactive

Default Action: [Dropdown]

Drug Related  Weapon Related  Injury Threat

State Offense Code: 24 Violation of School Rules

**Ed-Fi Behavior: 02**

01 [State Offense] in State Offense Code

Asterisk (\*) denotes a

02 [School Violation]

03 [Other]

04 [School Code of Conduct]

06 [Abuse Of Volatile Chemical]

09 [Abuse Of Volatile Chemical]

21 [Violation Of Student Code Of Conduct]

46 [Aggravated Robbery]

# CHECKLIST – LOCATION CODES

- Location Code Maintenance
- Crosswalk to the appropriate Ed-Fi Location Code
- These are the Discipline Location Codes, where did the incident occur.

Location Codes (159)

Views: General Filters: \*Active Location Codes

Code	Short Description	Long Description	Status*	Ed-Fi Location
101	Location (101)	Location (101)	Active	Classroom
1100	Location (1100)	Location (1100)	Active	Administrative offices area
1101	Location (1101)	Location (1101)	Active	Administrative offices area
1106	Location (1106)	Location (1106)	Active	Administrative offices area
1108	Location (1108)	Location (1108)	Active	Administrative offices area

Location Codes (136)

Location Code: 101

\* Short Description: Location (101)

\* Long Description: Location (101)

Address Type:  Select address  Enter freeform address

Address: \_\_\_\_\_

**Ed-Fi Location:** Classroom

Status:  Active  Inactive

# CHECKLIST – DIFFERENCE REASON CODES

- Crosswalk to the appropriate Ed-Fi Reason Code
- If this is not used, these can be left blank.
- Difference Reason codes are used to explain why an action was more/less severe than the standard action.

Code ▲	Short Description	Long Description	Ed-Fi Reason
SP	Special Ed Stud	Special Ed Student	Other

Difference Reason Code: SP

\* Short Description: Special Ed Stud

\* Long Description: Special Ed Student

Ed-Fi Reason: Other

Asterisk (\*) denotes a requirement

- Continuation of Previous Year's Disciplinary Action Assignment
- No Difference
- Other
- School Year Ended
- Student Completed Term Requirements Sooner Than Expected
- Student Incarcerated
- Student Withdrew From School
- Term Decreased Due To Extenuating Health-Related Circumstances
- Term Modified By Court Order
- Term Modified By District
- Term Modified By Mutual Agreement
- Term Modified By Placement Program Due To Student Behavior While In The Placement

# CHECKLIST – ABSENCE TYPE CODE

- Ed-Fi Codes only need to be added if the state code is different than the Ed-Fi Code.
- Codes for Tardy and Left Early should have a BLANK State Code but the correct Ed-Fi Code entered.

Absence Type Codes (140)

Absence Type Codes for Entity (012) Grades 3 to 5 (012), School Year 2017-18

Type Code	Short Description	Long Description	Category	Count in Truancy	Disciplinary Action	Include in Total Attendance	Allow Overwrite by Pos Atnd	Ed-Fi Code
A	Ex Early Out	Ex Early Check Out	Excused	N	Absence	Y	N	E
B	Unex Early Out	Unex Early Check Out	Unexcused	N	Absence	Y	N	G
C	Classroom Absen	Classroom Absence	Other	N	Absence	N	N	
E	Excused Absence	Excused Absence	Excused	N	Absence	Y	N	

Absence Type Code Maintenance (118)

**Absence Type Codes**

Entity ID: 012  
Entity Name: Entity (012) Grades 3 to 5  
School Year: 2017-18  
Type Code: A

\* Short Description: Ex Early Out  
\* Long Description: Ex Early Check Out  
Absence Category: Excused  
Disciplinary Action: Absence

Count in Truancy  
 Include in Total Attendance ?  
 Do not display in Family/Student Access  
 Do not include in Auto Email  
 Allow overwrite by Positive Attendance ?

State Code: A Excluded Absence  
**Ed-Fi Code: E** Excluded Left Early

# CHECKLIST – TENNESSEE BUTTON

- Tennessee Button Section Screen Maintenance
- Will default to Regular Student
- Will only need to fill in when one of the other Codes applies

Tennessee Class Information Maintenance (129)

Course Key: 00300 3rd Learning Goals

Section: 001

Service District ID: 51

Service School ID: 12

Class Type: T - Traditional

Teaching Method: T - Traditional

Quality Points:   Federally Funded

**Population Served:**

- Adult Basic Education Students
- Bilingual Students
- Career and Technical Education Students
- Compensatory/Remedial Education Students
- Economic Disadvantaged
- ESL Students
- Gifted and Talented Students
- Honors Students
- Migrant Students
- Regular Students**
- Special Education Students

Instruction Method:

Post-Secondary Institution:

Test Admin Window:

State Dual Credit

Teacher History [?](#)

Start Date:  End Date:

There are no records to display

0 records displayed Start Date:

Add Edit Delete

# CHECKLIST – COURSE MASTER

- **Course Master:** If you have a Course that isn't reported to the State, doesn't have a State Course Code assigned to it or no students enrolled, please check the Do Not Send to Ed-Fi.
- Courses set to Inactive will also not be sent to Ed-Fi

**Edit Course (398)**

Entity: 010 Entity (010) Grades 9 to 12 School Year: 2017-18 Curriculum: 09305 (000) Study Hall

\* Course Key: 09305 \* Short Description: Study Hall \* Long Description: Study Hall

**General Properties**

**Section Defaults**

**Tennessee State Specific**

Honors Indicator

State Code Override: [dropdown]

Do Not Send to ED-FI

**End of Course (EOC)**

# CHECKLIST – STAFF ASSIGNMENTS

- Staff members such as Teachers, Assistant Principals, Counselors need a current year Staff Assignment Record.
- For Staff such as EIS/SIS leads, data coaches etc who typically don't have a staff assignment, assign a lead role of XD (District Level Leader) or XS (School Level Leader).
- Please note that the Staff classification code of XD and XS should only be used for Ed-Fi.

The screenshot shows the 'Staff Browse' interface for a district with 630 staff members. The view is set to 'General' and filtered to '\*All Staff'. The staff member 'Amorscr, Fiona' is selected, showing her details and a table of her assignments.

Last Name	First	Middle	Staff Key	A	I	Emp. ID
Amorscr	Fiona	G	AMORSFI0000	A		514252

Expand All Collapse All Modify Details (displaying 10 of 10) View Printable Details

General Edit General

Address Edit Address Edit Mailing Address

Assignments Add Assignment

		Code	Assignment	Start Date	End Date
Edit	Delete	DS	Superintendent / Director	05/05/2014	
Edit	Delete	XD	District Level Leader	05/23/2016	

# CHECKLIST – STAFF INFORMATION

- Ensure the Staff members have an active Entity
- Staff Email: Staff Work Email  
Address is a required field for both EIS & Ed-Fi.

The screenshot displays the Skyward Staff Browse interface for Entity (000) (000). The staff member Fiona G. is selected, showing details such as Staff Key AMORSF10000, Emp. ID 514252, and Primary Phone (555) 238-3459. The email address Scramble1907@start.com is highlighted. Below the details, the Entity table shows two entries: one with Entity ID 000 (Inactive) and one with Entity ID 005 (Active).

Last Name	First	Middle	Staff Key	A	I	Emp. ID	Primary Phone	Email
Amorscr	Fiona	G	AMORSF10000	A	I	514252	(555) 238-3459	Scramble1907@start.com

Entity ID	CY Status	NY Status	Grade	Bldg ID	Room #	Room Ext	Default
000	Inactive	Inactive					
005	Active	Active					

# CHECKLIST – STAFF INFORMATION

- Staff Type: Ensure employment status (Full Time/ Part Time) is filled in
- Staff Record: If you have a Staff Member that isn't reported to the State, please check the Do Not Include for Ed-Fi.

▼ Staff Types ? Add Staff Types				
Type ID	Description	Primary?		
<a href="#">Edit</a>	<a href="#">Delete</a>	F	Full Time	Yes

**Staff Information (106)**

Staff Information

**Name Information**

Name:   [Edit Name](#)

SSN:  Employee ID:

Comment:

Title:  Initials:

\* Long Name:  \* Short Name:

License Number:  TN Unique ID:  [SI](#)

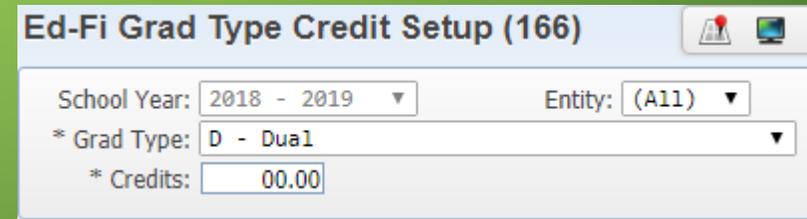
Primary Endorsement Code:

Do Not Include For Ed-Fi

Discipline Officer  Teacher  Substitute  Counselor

# CHECKLIST – GRAD TYPE CREDIT

- Ed-Fi Grad Type Credit Setup
- This is found under Ed-Fi Configuration
- This needs to be done per entity, you can create for all entities from the District Entity.
- This will need to be setup each school year.
- The export will pull 28 credits as a default.

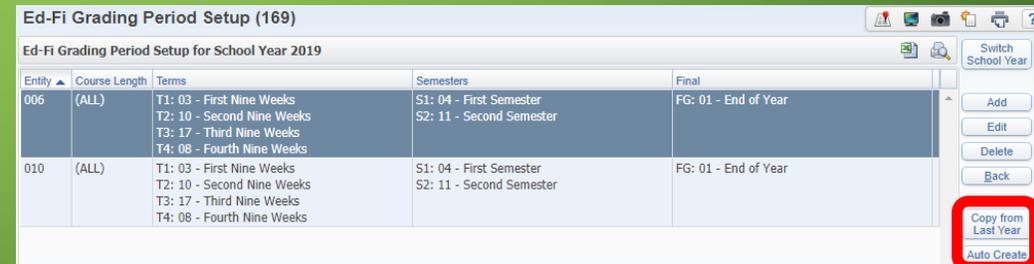


The screenshot shows a software window titled "Ed-Fi Grad Type Credit Setup (166)". It contains the following fields:

School Year:	2018 - 2019	Entity:	(A11)
* Grad Type:	D - Dua1		
* Credits:	00.00		

# CHECKLIST – GRADING PERIOD SETUP

- Ed-Fi Grading Period Setup
- This is found under Ed-Fi Configuration
- This area controls what Grade Buckets will be pulled
- This can be Auto Created or Copied from Last Year do this from the 000 entity.



Ed-Fi Grading Period Setup (169)

Ed-Fi Grading Period Setup for School Year 2019

Entity	Course Length	Terms	Semesters	Final
006	(ALL)	T1: 03 - First Nine Weeks T2: 10 - Second Nine Weeks T3: 17 - Third Nine Weeks T4: 08 - Fourth Nine Weeks	S1: 04 - First Semester S2: 11 - Second Semester	FG: 01 - End of Year
010	(ALL)	T1: 03 - First Nine Weeks T2: 10 - Second Nine Weeks T3: 17 - Third Nine Weeks T4: 08 - Fourth Nine Weeks	S1: 04 - First Semester S2: 11 - Second Semester	FG: 01 - End of Year

Switch School Year

Add

Edit

Delete

Back

Copy from Last Year

Auto Create

# CHECKLIST – ENTITIES TO PROCESS

- Entities to Process
- This is found under Ed-Fi Configuration
- Uncheck the entities that should not be sent to Ed-Fi (unused or census entities)

Entities to Process (132)

Entity	Type	2017	2018
<input checked="" type="checkbox"/> 003 - Entity (003)	Regular	No	Yes
<input type="checkbox"/> 004 - Entity (004)	Regular	No	No
<input checked="" type="checkbox"/> 005 - Entity (005)	Regular	Yes	Yes
<input checked="" type="checkbox"/> 006 - Entity (006) Grades 6 to 8	Regular	Yes	Yes
<input checked="" type="checkbox"/> 010 - Entity (010) Grades 9 to 12	Regular	Yes	Yes
<input checked="" type="checkbox"/> 012 - Entity (012) Grades 3 to 5	Regular	Yes	Yes
<input type="checkbox"/> 900 - Entity (900)	Regular	No	No

Save  
Back  
Select All  
Unselect All

# ASSIGN STUDENT/STAFF IDS

Identity Lookup (328)

View: General Filters: \*Skyward Default

Name	First	Middle	Name Key	TN ID	DOB	Gender	Status
dvark media ltdscr			AARDVARK000				N/A
onsonscr	Leda	J	AARONLED000				N/A
escr	Elisa	O	AASESELI000				N/A
AG			AATG 001				N/A
cus software ltd t/a ab			ABACUS 5000				N/A
discr	Kyoko	R	ABADIKYO000				N/A
irscr	Ramonita	E	ABAIRRAM000				N/A
rescr	Jerri	O	ABAREJER000				N/A
stascr	Alona	E	ABASTALO000				N/A
xisscr			ABAXISSC000				N/A
amontescr	Sarina	X	ABBAMSAR000				N/A
escr	Francisco	L	ABBESFRA000			Male	N/A
ittscr	Maia	E	ABBITMAI000				N/A
oudscr	Katharina	G	ABBOUKAT000				N/A
ruzzesescr	Cyndy	V	ABBRUCYN000				N/A
allascr	Alexander	L	ABDALALE000			Female	N/A
allascr	Taneka	K	ABDALTAN000	1001238728	06/02/2007	Female	N/A
elhamidscr	Portia	B	ABDELPOR000				N/A
oolscr	Hailey	H	ABDOOHAI000				N/A
escr	Kristie	D	ABEESKRI000				N/A

20 records displayed Last Name:

- View/Assign Individual Identities located under TN SR > Ed-Fi > Identities.
- Change Views from General to Staff or Student

# SET THE FILTER TO VIEW STAFF WITH NO TN ID ASSIGNED

- Click on the blue Quick Filter Button on the top right to open the Filter Browse.
- Remove all the Z's from the TN ID field.
- Add an A in the Status field high and low values.
- Click Apply Filter

TN Identity Lookup (328)

Views:  Filters:

Last Name ▲	First	Middle	Name Key	TN ID	DOB	Gender	Status
							A
????????????????	????????	????????	????????????		????????	??????	A

Reset

Apply Filter Hide Filter

# ASSIGN THE ID

- Highlight the staff member or student and click Assign ID.
- Click Search Identities.

### Assign ID (139)

[Back](#)

#### Name Information

First Name:

Middle Name:

Last Name:

Name Key:

#### Search

First Name:

Last Name:

Gender:  Blank  Male  Female

Date of Birth:

#### Search Results

# SEARCH RESULTS

## Assign ID (108)

### Name Information

First Name:   
Middle Name:   
Last Name:   
Name Key:

### Search

First Name:    
Last Name:   
Gender:  Blank  Male  Female   
Date of Birth:

### Search Results

	Unique ID	First Name	Last Name	Gen.	Birth Date	Weight
<a href="#">Select</a>	123456789	Elisa	Aasescr	F	01/01/1900	0
<a href="#">Select</a>	999999999	Elisa	Aasescr	F	01/02/1900	0
<a href="#">Select</a>	111111111	Elisa	Aaseccr	F	01/03/1900	0

\*Your screen will look a little different since Skyward's database is not connected to the API

- Once the search completes, check the results and determine if any are a match.
- If there is a match, click Select next to the matching record to assign that ID to the staff member or student.
- If none of the results are a match, click on Create New Identity
- Repeat those steps until all staff and students have an ID assigned.

# VALIDATION REPORT

The screenshot shows a web browser window with the title "Ed-Fi Validation Report - Entity 000 - WS\SR\TN\EF\ED - 31960 - 05.18.02.00.09 - Google Chro...". The address bar shows "localhost/scripts/cgiip.exe/WService=wsStu/ssredfiedit011.w?isPopup=true". The main content area is titled "Ed-Fi Validation Report" and contains three sections:

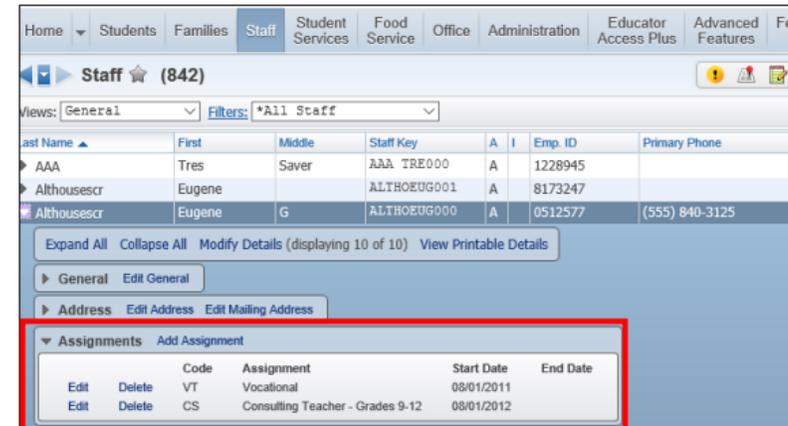
- Template Settings:** Includes a "Back" button, a "Template Description" dropdown set to "2017 - All Options", and two checkboxes: "Share with other users in entity 000" (unchecked) and "Print Greenbar" (unchecked).
- Ranges:** Includes a "School Year" dropdown set to "2016-17" and a list of entities with checkboxes:
  - 100 - Entity (100)
  - 200 - Entity (200) Grades 5 to 8
  - 210 - Entity (210) Grades 5 to 8
  - 300 - Entity (300) Grades 9 to 12
  - 310 - Entity (310) Grades 9 to 12
- Options:** Includes several checkboxes and input fields:
  - Validate Students: Student Key: [ ] Low High [ zzzzzzzzzzzz ]
  - List Students without a TN Unique ID
  - Validate Staff: Staff Key: [ ] [ zzzzzzzzzzzz ]
  - List Staff without a TN Unique ID
  - Validate Courses: Course Key: [ ] [ zzzzzzz ]
  - List Courses without a State Course Code
  - Include Courses with No Meets
  - Include Prior Year Courses: Start Year: [ 2011 ]
  - Validate Other Codes and Setup

- Located under TN SR > Ed-Fi
- Skydoc – common errors/warnings and possible fixes.
- This should be completed and all errors/warnings cleared before beginning the Bulk Load process.

# SkyDoc Validation Report Guide

Example: Staff Member  
with no open Staff  
Assignment for current  
School Year

**Warning Failure: The following Staff Members are active but have no open Staff Assignments for current School Year.**



The screenshot shows the SkyDoc interface for a staff member's record. The staff member is Eugene Althousescr, with Staff Key ALTHROEUG000 and Emp. ID 0512577. The record is expanded to show the Assignments section, which is highlighted with a red box. The Assignments table shows two entries: Vocational (VT) and Consulting Teacher - Grades 9-12 (CS), both with a start date of 08/01/2011 and no end date.

Last Name	First	Middle	Staff Key	A	I	Emp. ID	Primary Phone
AAA	Tres	Saver	AAA TRE000	A		1228945	
Althousescr	Eugene		ALTHROEUG001	A		8173247	
Althousescr	Eugene	G	ALTHROEUG000	A		0512577	(555) 840-3125

		Code	Assignment	Start Date	End Date
Edit	Delete	VT	Vocational	08/01/2011	
Edit	Delete	CS	Consulting Teacher - Grades 9-12	08/01/2012	

Navigate to the Staff record and expand the record. Assign the appropriate code for the current year. If the staff member is someone that wouldn't need an assignment like a Food Service staff member or a Bus Driver, then ignore the error.



# BULK LOAD VS TRANSACTIONAL UPDATES

- **Bulk Load**
  - Used initially to load data into the Ed-Fi Dashboard.
  - The data is sent in groups and the errors must be cleared for each group.
  - Once the initial loads are completed and the errors are cleared, Bulk Load will not be used for the remainder of the school year.
- **Transactional Updates**
  - Turned on after the Bulk Load Process is completed.
  - Once turned on, the changes are sent automatically.
  - Typically only turned on for the current school year.

# BULK LOAD

- Export Ed-Fi XML located under TN SR > Ed-Fi
- Can be run from individual Entity, but typically run from District.
- **Must be run in the following order:**
  - EdOrg, EdOrgCalendar, and Master Schedule.
  - StudentParent and Student Enrollment.
  - StaffAssociation, StudentAttendance, StudentCohort, StudentDiscipline, StudentGrade, StudentPrgm & StudTrans
  - Process will run in Print Queue, check to make sure individual files have completed before running another interchange.

# EXPORT ED-FI XML

**Export Ed-Fi Files**

**Template Settings**

\* Template Description:

Share with other users in entity 000

Print Greenbar

**Ranges**

\* School Year:

All Schools

**Entity Selection**

100 - Entity (100)

200 - Entity (200) Grades 5 to 8

210 - Entity (210) Grades 5 to 8

300 - Entity (300) Grades 9 to 12

**Interchanges to Export**

EducationOrganization

EducationOrgCalendar

MasterSchedule

StaffAssociation

StudentAttendance

StudentCohort

StudentDiscipline

StudentEnrollment

StudentGrade

StudentParent

StudentProgram

StudentTranscript

**Options**

Run StudentParent again after StudentEnrollment

Run StaffAssociation Twice

- Select the Interchanges on the template.
- Options - These take care of problems associated with data in one Interchange validating off information in another Interchange. Check these when available.
  - Run StudentParent again after Student Enrollment
  - Run StaffAssociation twice

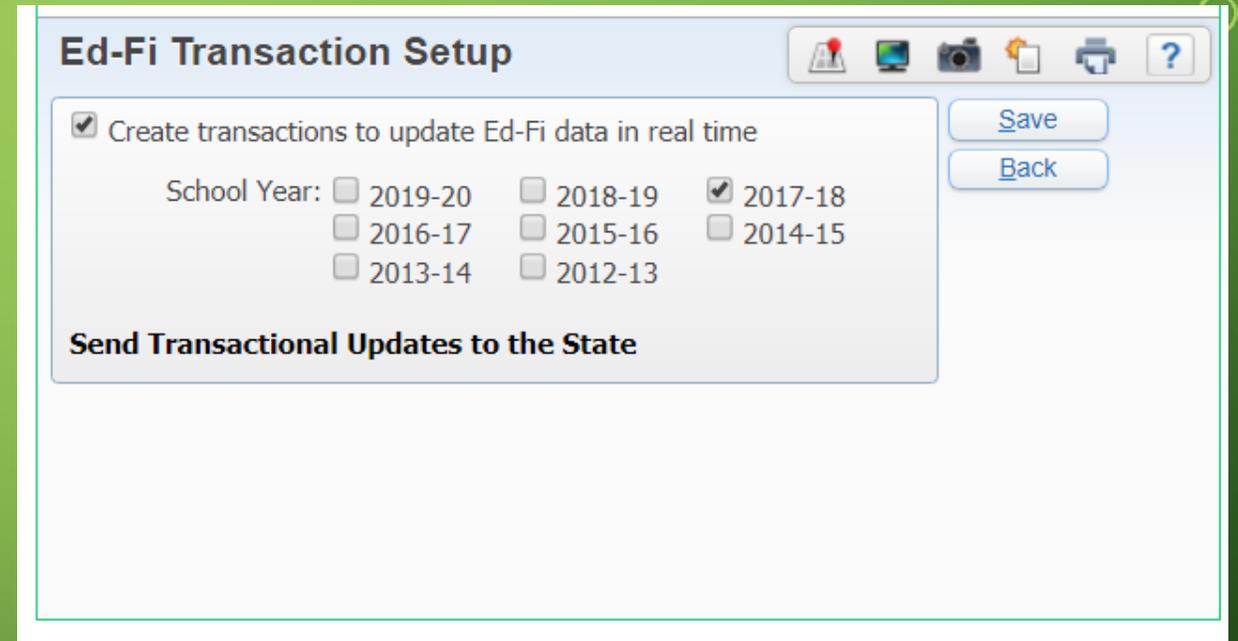


# VIEW EXPORTED FILES

- Located under TN SR > Ed-Fi
- If successful, Batch Status will be set to Success.
- If Batch Status is set to Error, click on Review Errors button on the right.
- Only 500 errors will display at a time.
- There will be a clickable '?' that will provide information on possible fixes.
- Once errors are cleared, run the Export Ed-Fi XML again.
- Once all errors are cleared and Batch Status shows Success, move on to the next group of Interchanges.

# TRANSACTIONAL UPDATES

- Ed-Fi Transactional Setup, located under TN SR > Ed-Fi > Setup > Configuration – turn on Transactional Updates



The screenshot shows a web application window titled "Ed-Fi Transaction Setup". The window has a light blue header with standard icons (home, refresh, camera, print, help). The main content area is white and contains the following elements:

- A checked checkbox labeled "Create transactions to update Ed-Fi data in real time".
- A "School Year:" label followed by a grid of checkboxes for the years 2019-20, 2018-19, 2017-18, 2016-17, 2015-16, 2014-15, 2013-14, and 2012-13. The 2017-18 checkbox is checked.
- A "Send Transactional Updates to the State" section, which is currently empty.
- Two buttons on the right side: "Save" and "Back".

# ED-FI ERROR REPORT

## Ed-Fi Error Report

### Template Settings

\* Template Description:

Share with other users in entity 000

Print Greenbar

### General Options

*If creating a Scheduled Task, be sure to choose Ed-Fi Error Report and not Email Ed-Fi Errors.*

Method:  Bulk  Events  Both

Date Range:  Yesterday  Last Weekday  Today  Specific Dates

Email Errors To:

### Event Error Options

Max Event Errors:  

Only Print Students Active in Entity 

Sort By:  Date/Time  Student, Date/Time  Hide Not Found Errors for Delete Requests 

Hide Notes at Top of Report

Complexes to Include:  All  Selected

- Validation errors for both Bulk and Transactional data.
- Can be created as a Scheduled Task.
- Documentation in SkyDoc

# ED-FI DATA SENT TO STATE

- On the right, click on Check ExComm Event
- Search using either the ExComm ID or Ed-Fi ID from the Ed-Fi Error Report.

Check Event Status - Entity 000 - WS\SR\TN\EF\EF\DS - 32780 - 05.18.02.00.09 - Google Chrome

localhost/scripts/cgiip.exe/WService=wsStu/ssredfiedit019.w?isPopup=true

### Check Event Status

Search by ExComm ID

Search by Ed-Fi ID

Search ExComm ID

Search Ed-Fi ID

Back



QUESTIONS?