System Admin Checklist

Welcome to Wayfinder! Use the checklist below to complete the technical setup and onboarding process for your school/district.

- If you are a school leader, see our Tech Set-Up for School Leaders guide.
- For info on privacy and data, see our Data + Privacy Overview.
- Need a breakdown of account roles? See our Account Types Overview.

1. Getting Started

- ☐ **Designate a technical contact** to manage rostering. If you're reading this, that's likely you!
- ☐ **If you have not already connected with Wayfinder Support**, email us at **support@withwayfinder.com** to start the rostering process.
- ☐ **Accept your email invitation to access Wayfinder as a System Admin.**
- ☐ **Log in** to the Wayfinder Web App
- ☐ **Invite your administrator users** (principals, school admins, counselors, etc.)

2. Technical Setup

- ☐ ⚠️ **Allowlist Wayfinder at these web addresses, or provide a network contact**⚠️
- ☐ **Decide on a login method for your users** (manual username + password, Google SSO, Clever SSO, ClassLink SSO, or Microsoft Azure)
- ☐ **(If using Google SSO)** Approve Wayfinder in your Google Admin Console
- ☐ **(Optional)** To enforce SSO-only logins, email support@withwayfinder.com to disable username/password access

3. Rostering Setup

- ☐ **Confirm student rostering plans** with Wayfinder. How will you be rostering? Which courses need to be rostered Wayfinder?
- ☐ **Review our Rostering Methods and choose the best fit for your school:**

Manual Rostering

☐ Watch our 3 -minute manual rostering video (includes QR codes and Google Classroom)

Flat Files + SFTP Rostering

☐ Watch our 7-minute flat file video or see our SFTP guidelines

Clever Rostering

☐ Be a District Administrator in Clever, or put us in touch with one
☐ Review our Clever Rostering guide
☐ Request our "Wayfinder Rostering" and "Wayfinder SSO" applications in Clever (Step 2)
☐ Wait for Wayfinder to approve your connection request (12-24 hrs)
☐ Set up your sharing rules for both applications (Step 4)
☐ Push your sync through to Wayfinder (Step 5)

ClassLink Rostering

☐ Review our ClassLink API guide
☐ Add the Wayfinder app in your Roster Server & toggle it on (Step 2)
☐ Set up your sharing rules (Step 3)
☐ Wait for Wayfinder to confirm the connection (12-24 hrs) (Step 4)
☐ Push your sync through to Wayfinder (Step 5)
☐ Set up ClassLink SSO

☐ ⚠️ **Don't forget to invite your administrator users** ⚠️
  - Administrator users are often left out of the rostering methods above. If you do not include administrator users when rostering teachers and students, please make sure to roster them manually.

4. Final Checks

☐ **Connect with Wayfinder Support (*support@withwayfinder.com*)** to confirm that onboarding is complete and set a "Go Live" date.
☐ **Send your teachers and/or students the appropriate login instructions**