

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](#)
- Roster non-teaching staff**, such as administrators or counselors who need access to Wayfinder, using one of the three options:
 - [Manually invite](#) them via the User Administration Portal
 - [Fill out this sheet](#) and send it to support@withwayfinder.com with editing permissions
 - If you use Clever or ClassLink, see the "Role Mappings" sections in our [Clever](#) or [ClassLink](#) guides to automate staff rostering

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 in Wayfinder?
- Review our [Rostering Methods](#) and choose the best fit for your school:**

Manual Rostering

- See our [Manual + Class Code Rostering](#) guide (includes QR codes and [Google Classroom](#))

Flat Files + SFTP Rostering

- See our [Flat File Rostering](#) guide and/or 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**