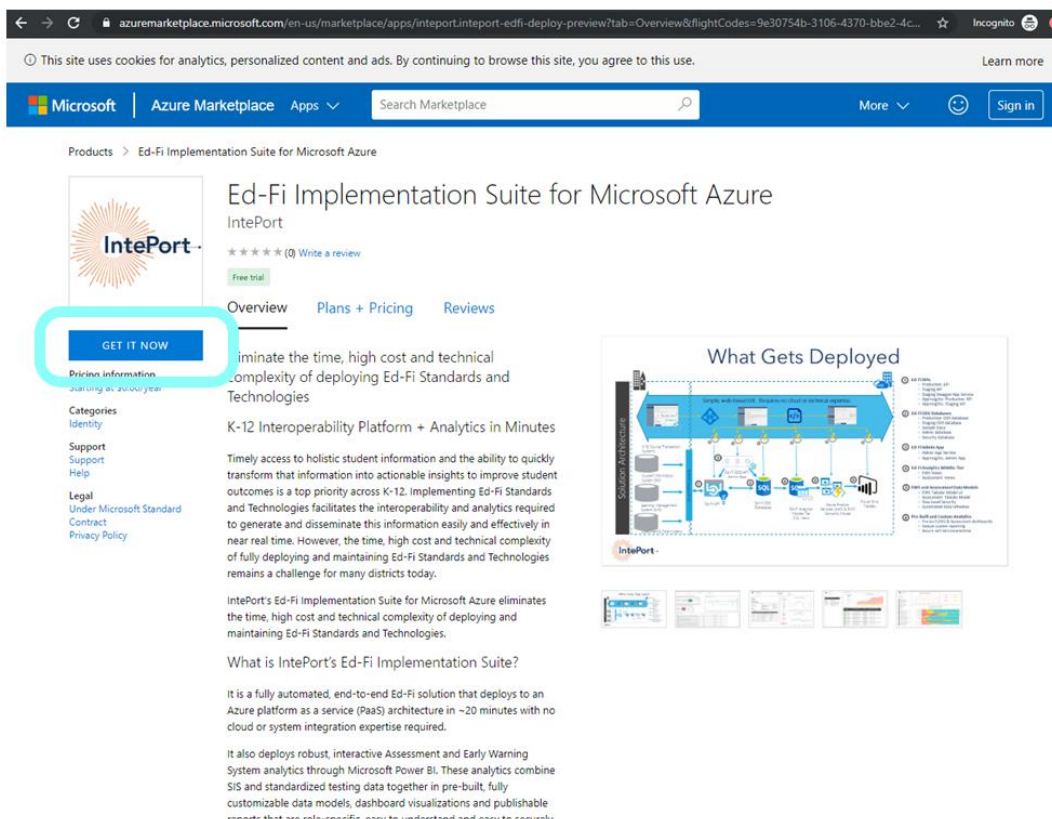# IntePort's Ed-Fi Implementation Suite

## Step-by-Step Deployment Instructions with Screenshots:

1. Navigate to Microsoft's Azure Marketplace in your browser. Search for IntePort. Choose the Ed-Fi Implementation Suite. Click the blue "Get It Now" button:

2. Azure will ask you to sign in (unless your browser is already signed in): Make certain you sign in with the account to be used for deploying the solution.

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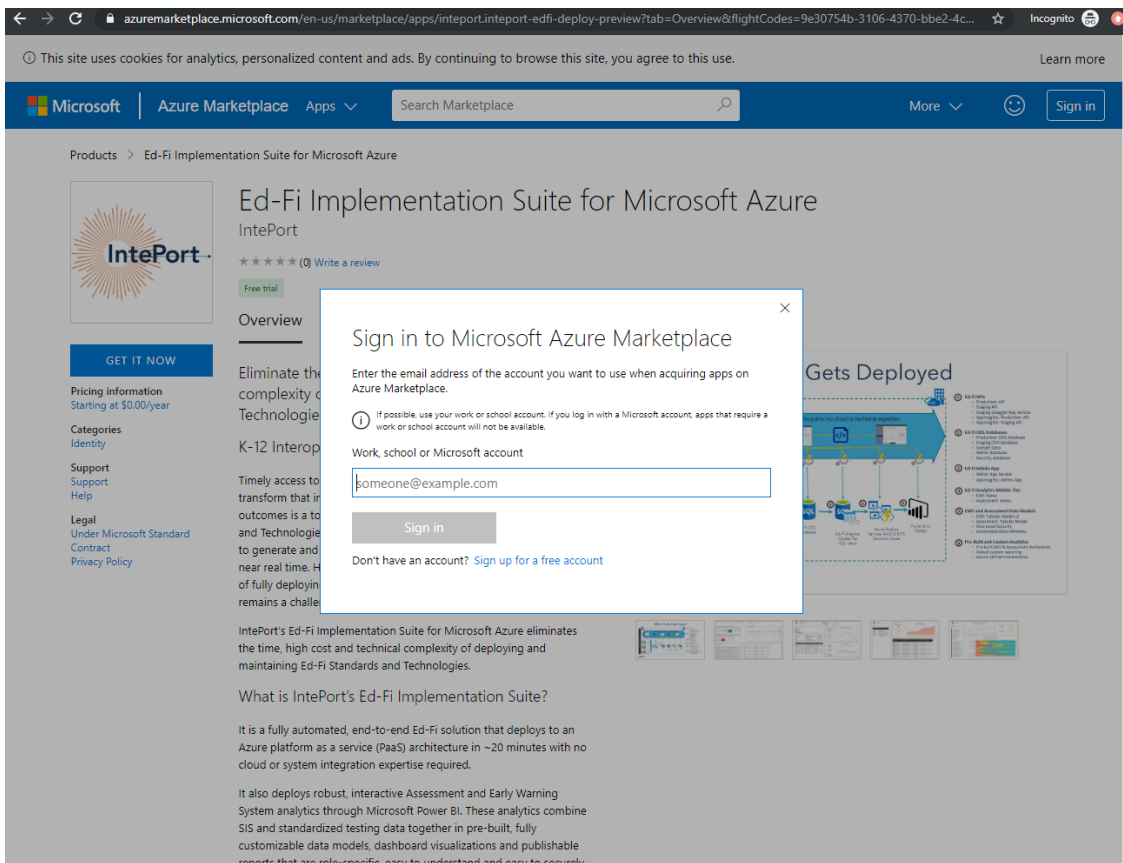
3. If your Azure subscription has not been fully populated with your info you may see the following screen:
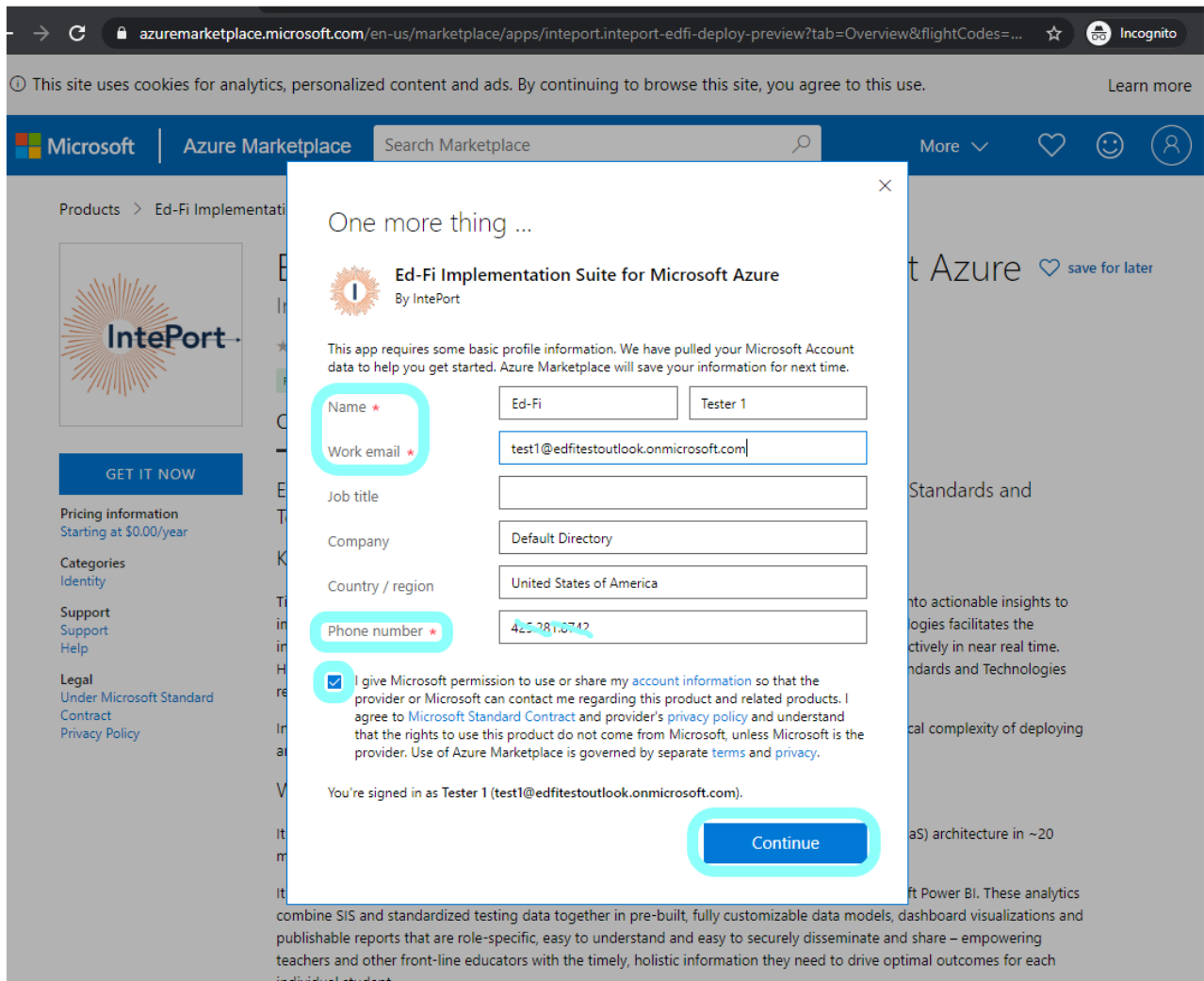

5a. Fill out any missing info, click the consent box and click the blue "**Continue**" button.

4. Azure then requests permission to access account info and confirms your sign-in account. Check the box and click the blue "**Continue**" button as shown below (**this pop-up may take up to a minute to appear**):
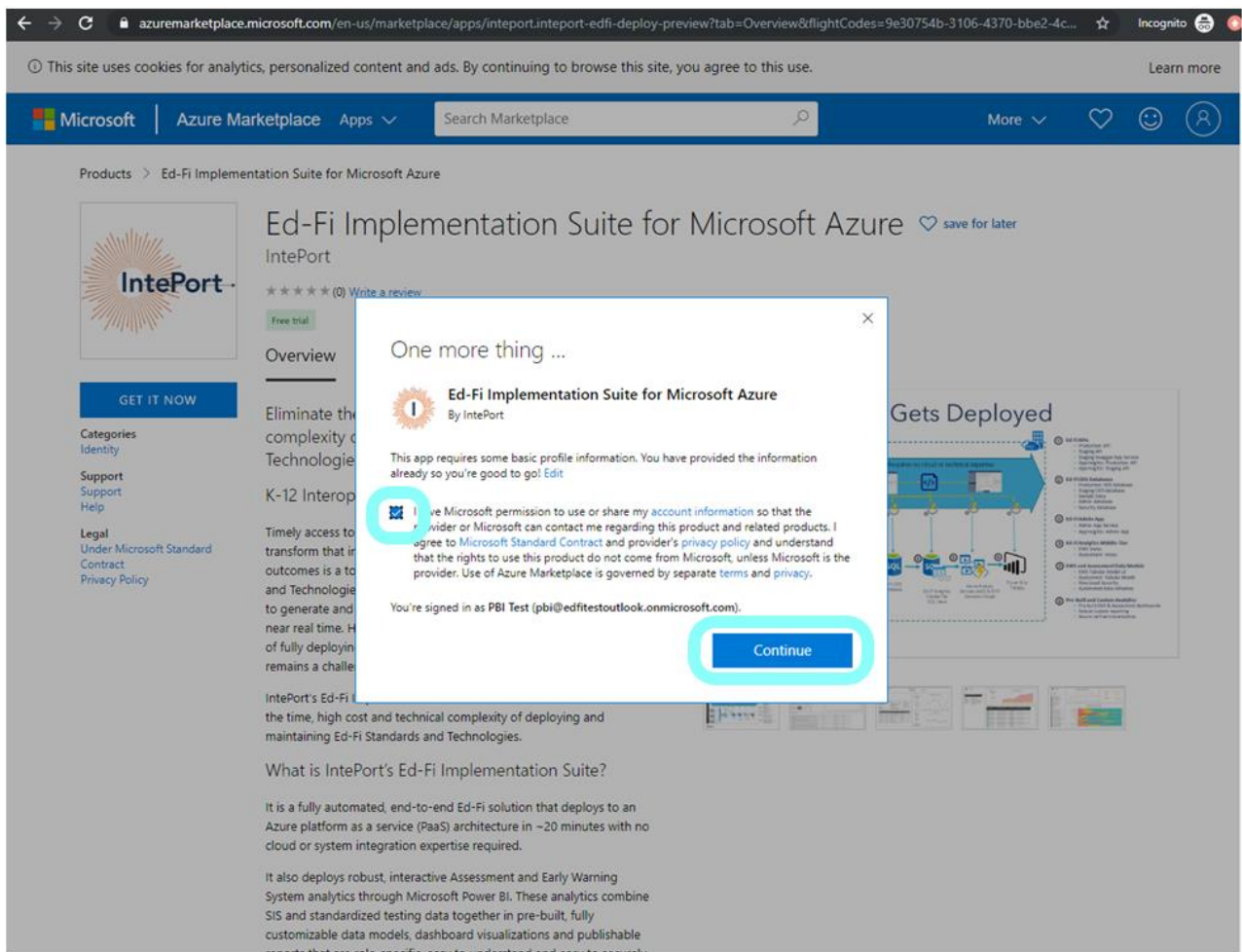
5. Azure will provide a new screen and ask you to select a software plan from the drop-down menu. Choose "**Ed-Fi Implementation Suite Deployment**" and then click the blue "**Create**" button:
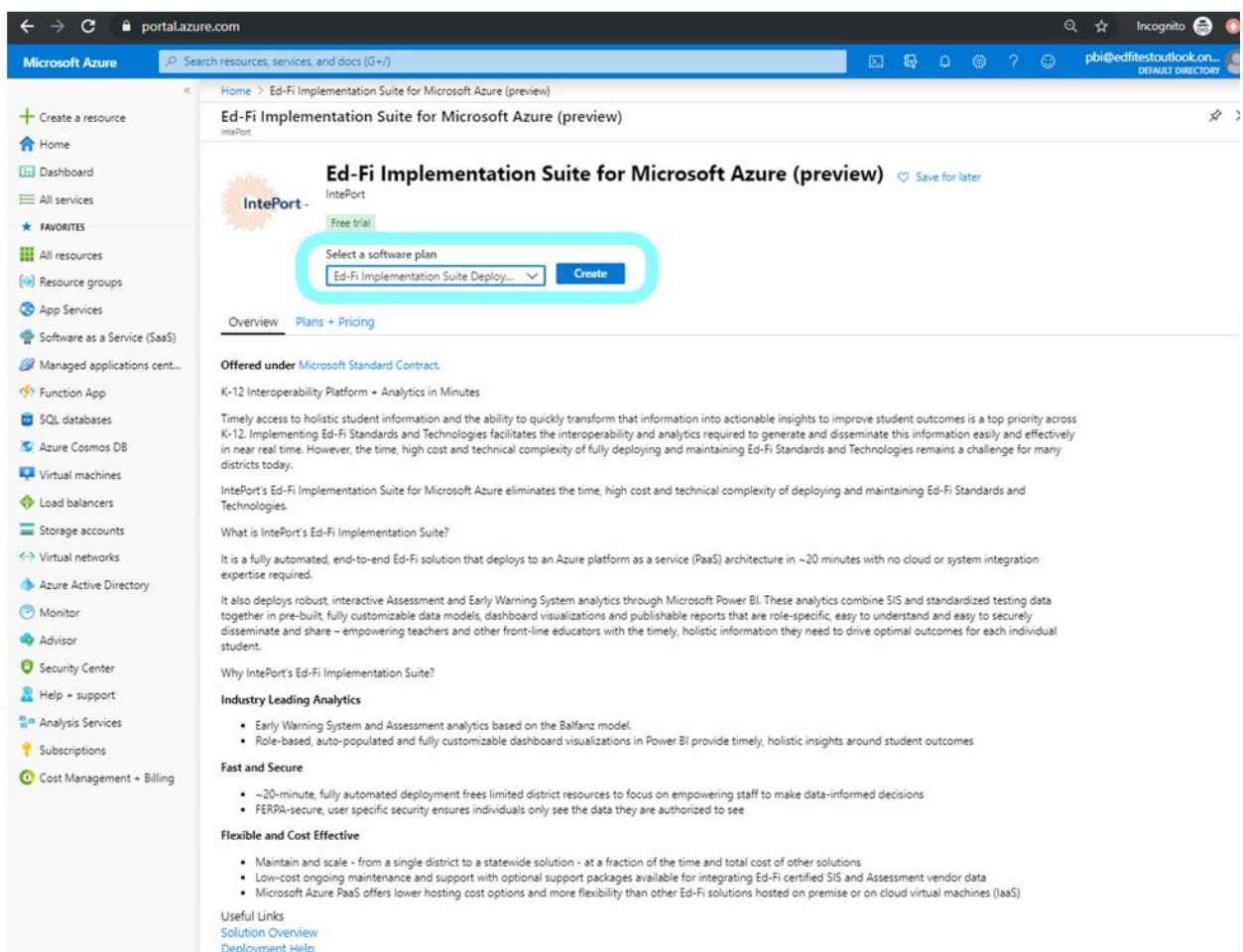
6. Azure then asks you to name your subscription and confirms your email address, phone number and your subscription. YOU WILL NEED ACCESS TO THIS EMAIL ADDRESS TO COMPLETE THE DEPLOYMENT STEPS.

8a. Name your subscription (ie) "**Test Ed-Fi Deployment"**, make certain the Billing Term is on Yearly, confirm your email address and phone number are correct and click the blue "**Subscribe**" button at the bottom of the screen:
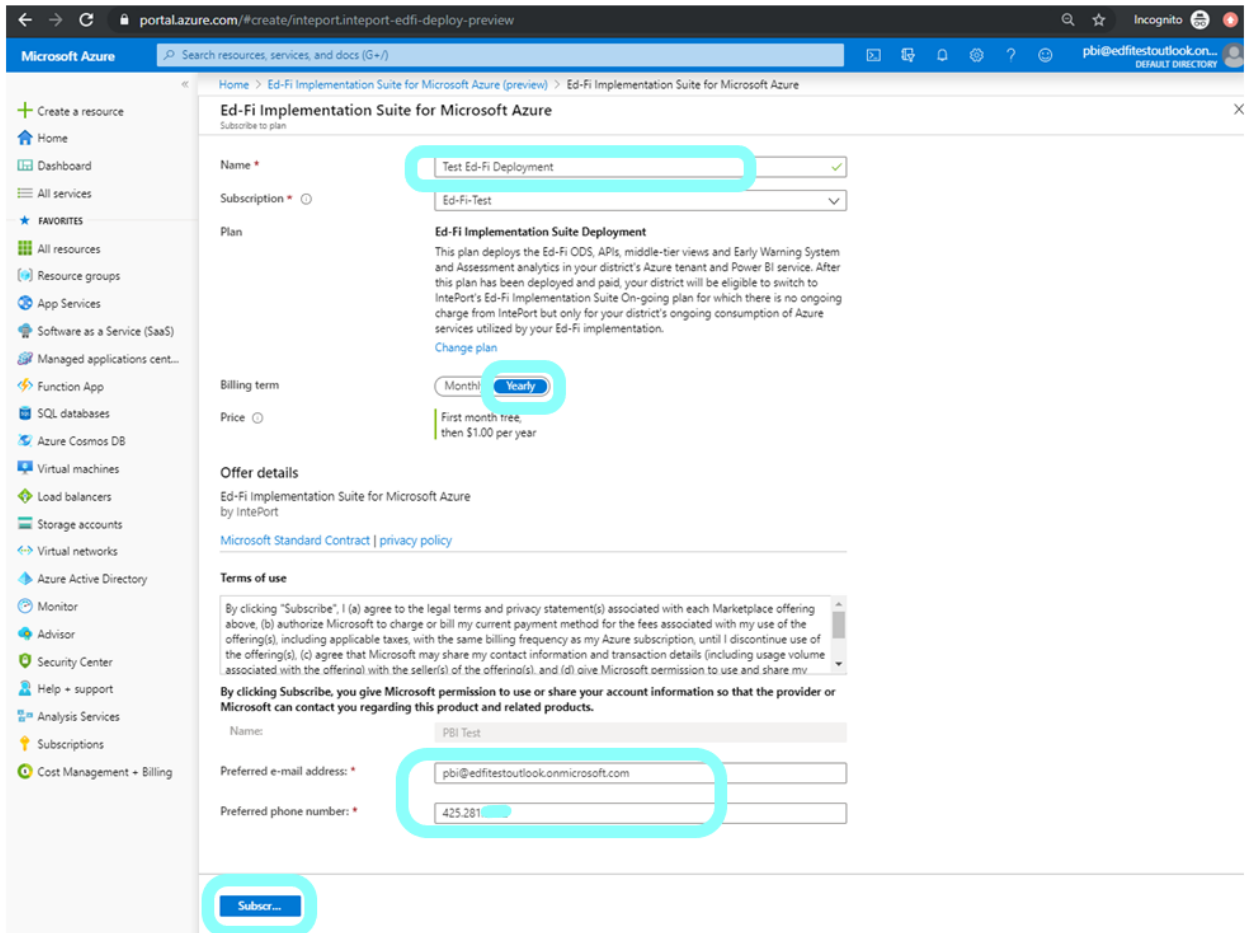
7. Azure kicks off the deployment provisioning and will automatically send you an email within a few minutes when provisioning is complete. Meanwhile, you will see this screen:
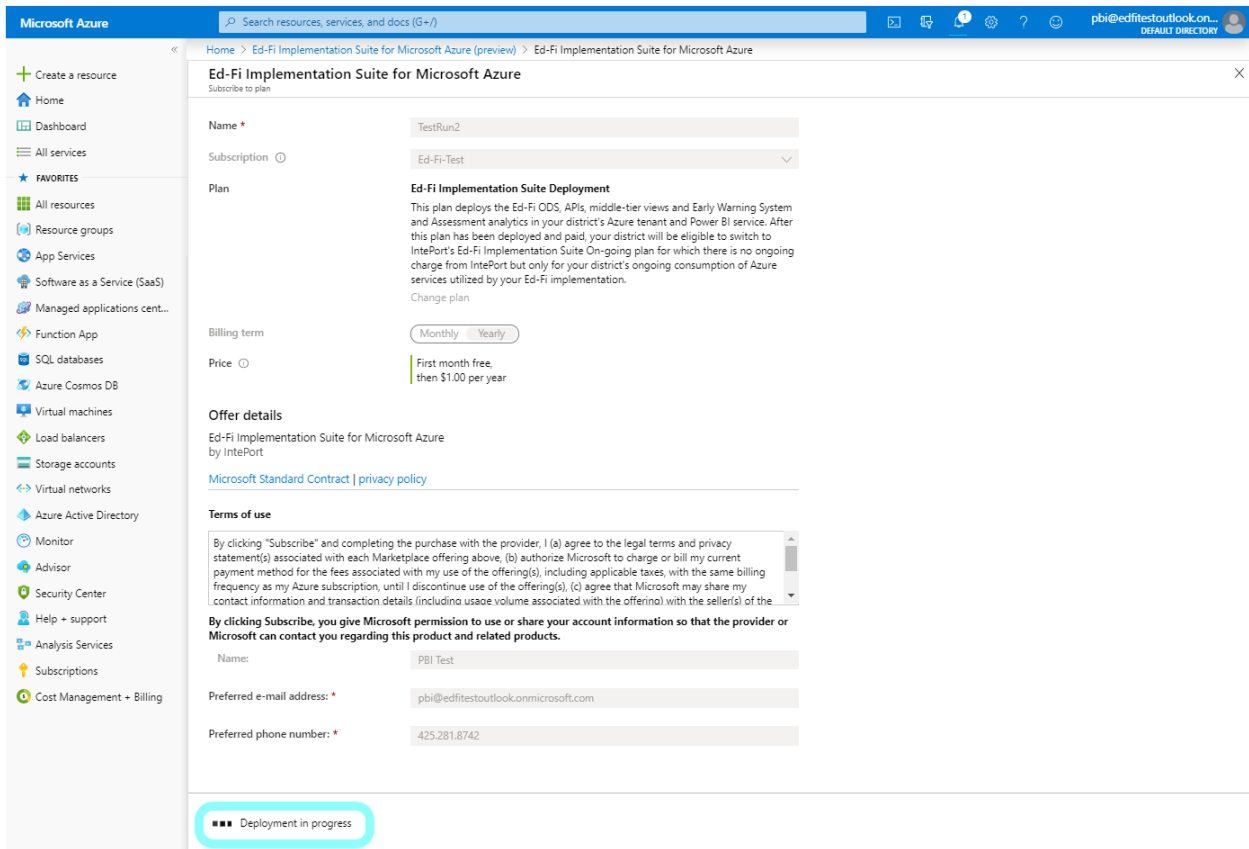
When provisioning is complete, the screen may change back to this:

8. Now, please check the email associated with this subscription for a configuration email from Azure:

This email can take 3-15 minutes to arrive. (If you use Outlook as your email client, please make certain to check your "Other" email folder).
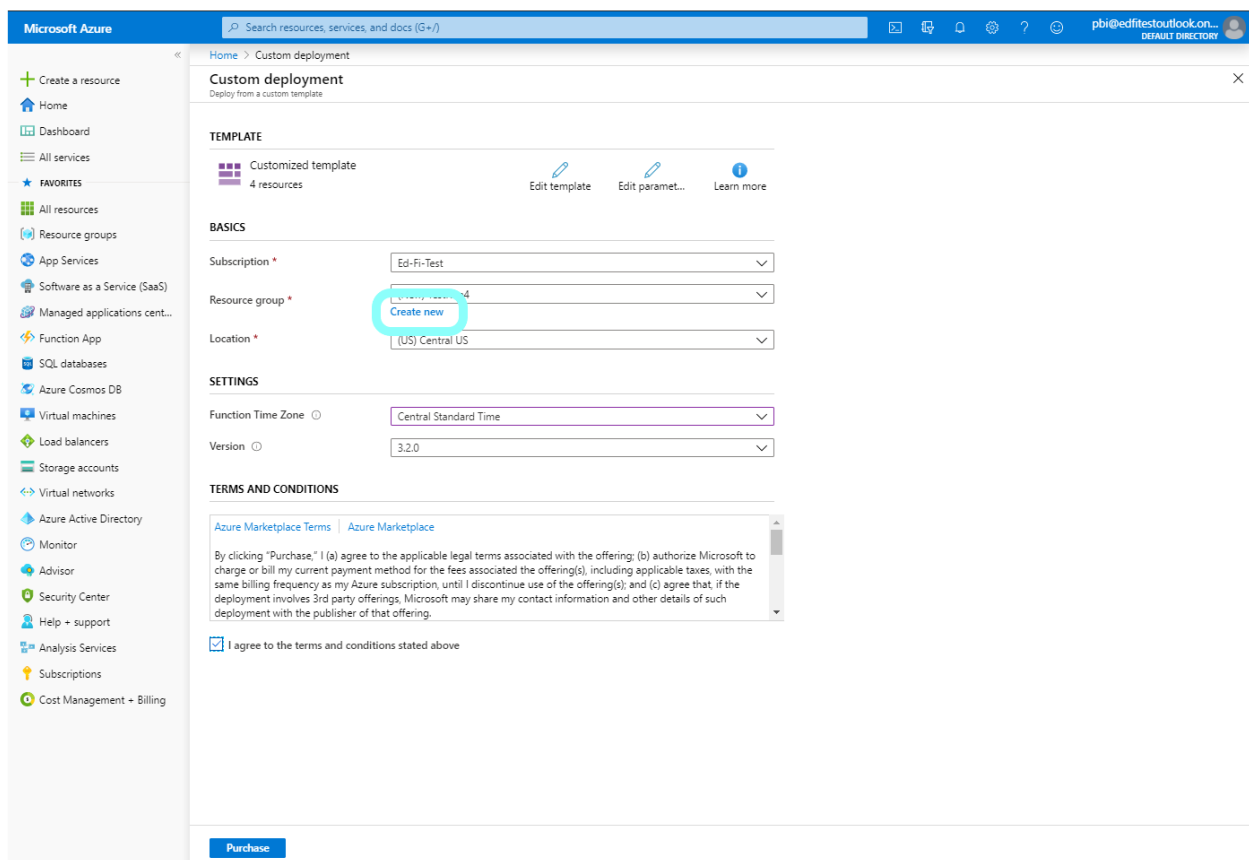

9. Click the blue "**Configure Now**" button.

Azure may ask for permissions; click the consent box and click the blue "**Accept**" button as circled below:
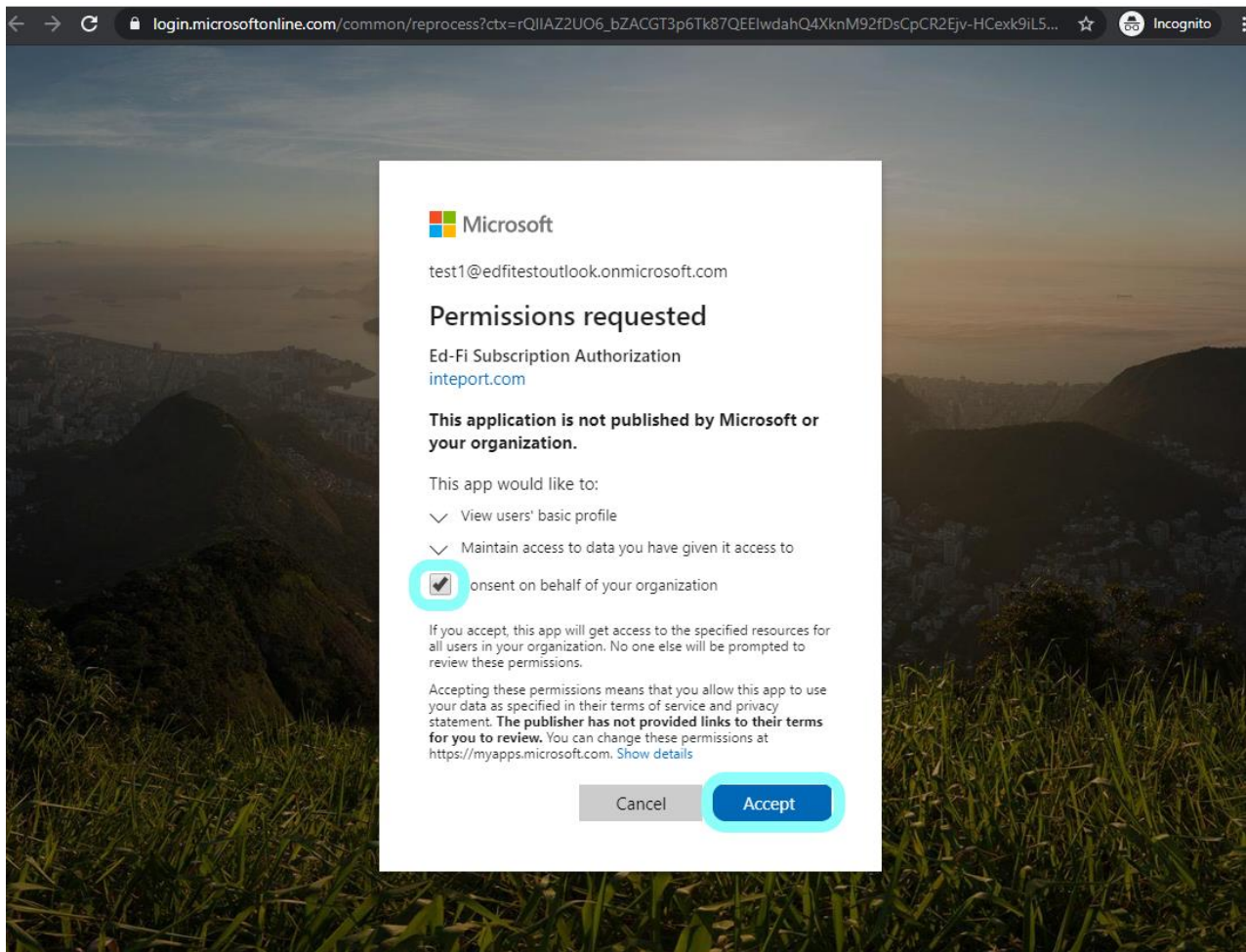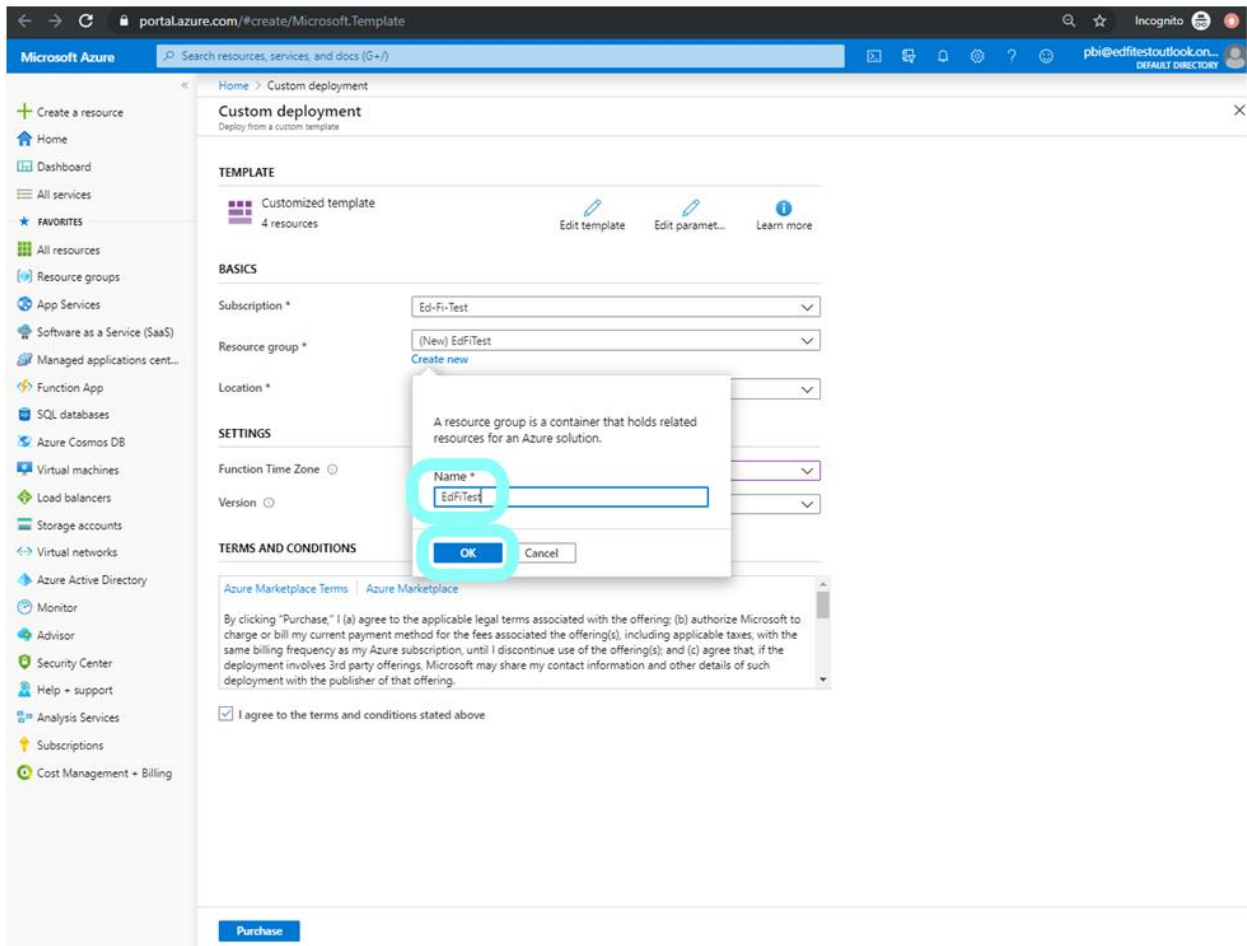
10. Azure opens a new browser window to create a new resource group and adjust settings, as seen here:

12a. Click the blue "**Create new**" link circled above to create a new resource group, name it (ie) "**EdFiTest**" and click the blue "**OK**" button:

11. Choose the closest match to your Location and your Time Zone, the Version of Ed-Fi you'd like, click the box to agree to the standard Azure Marketplace Terms and click the blue "**Purchase**" button to continue:
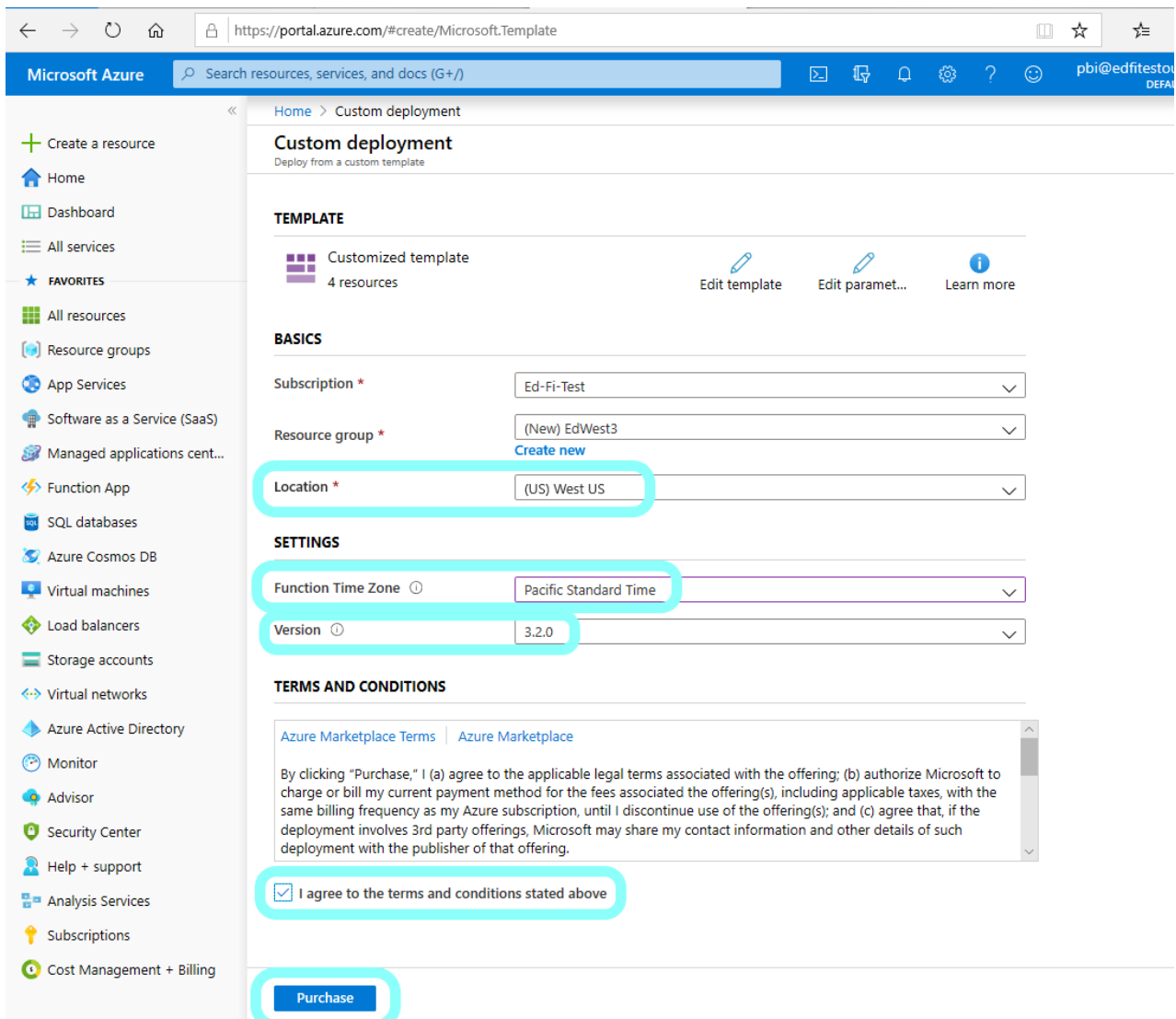

12. **Azure will automatically continue the deployment in the background while showing you this screen**:
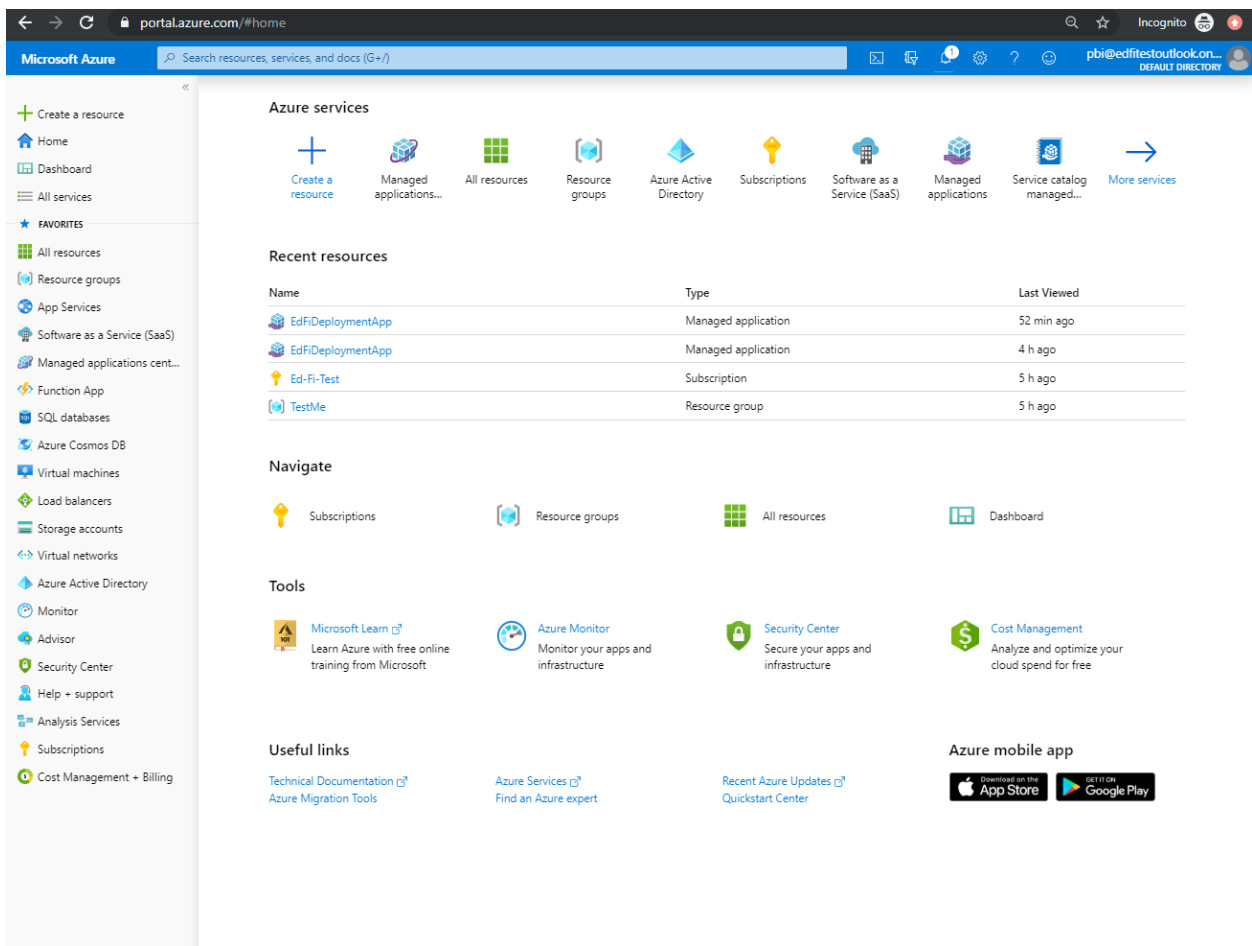
Please allow 20-40 minutes for the deployment to complete and check the email account associated with this subscription (same as the previous email a few steps ago).

13. Azure automatically sends a completion email upon conclusion of deployment:

(if you're using Outlook as your email client, <u>please make certain to also check your "Other" email folder)</u>
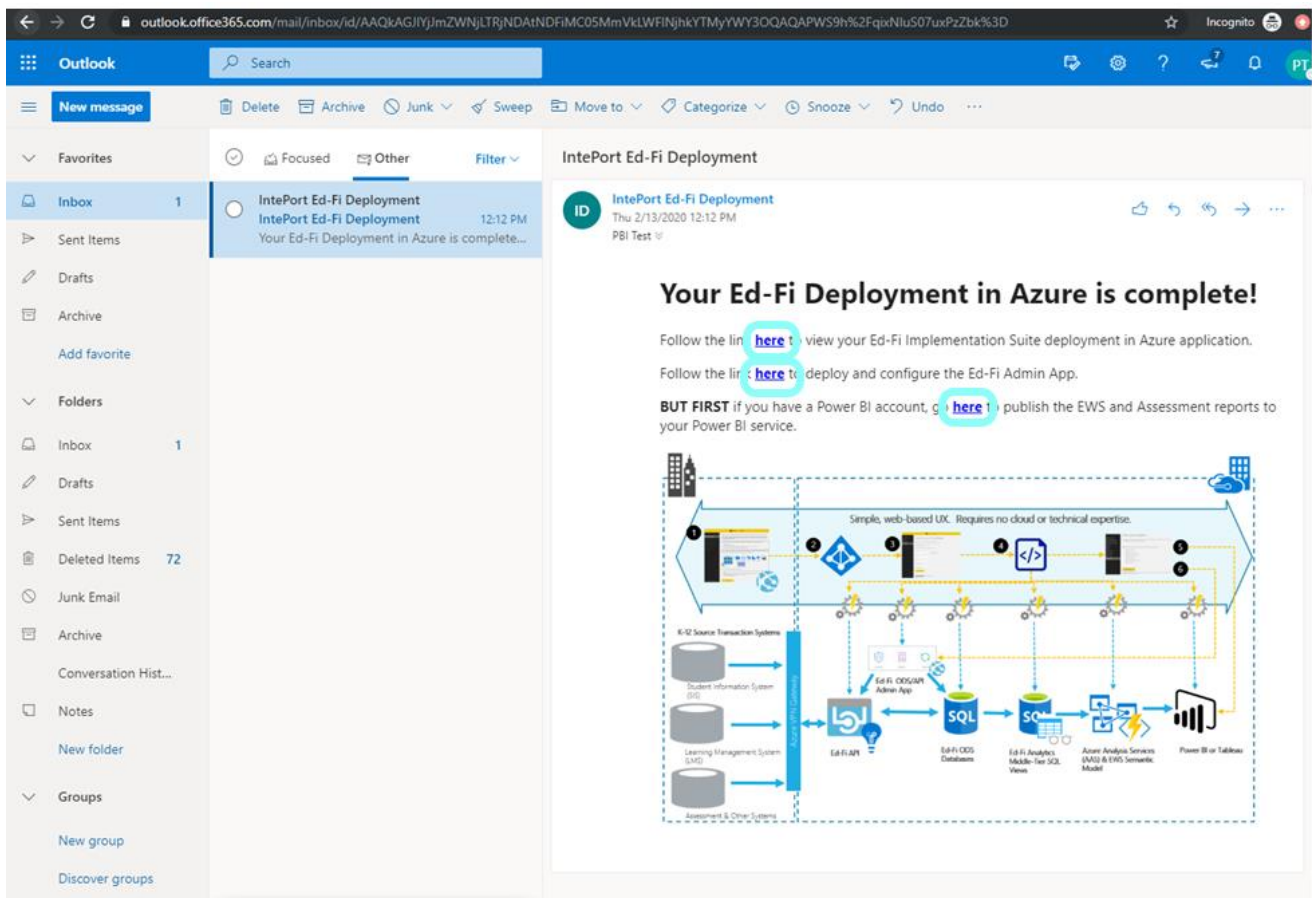
This deployment email has **three links** embedded:

- one for viewing the Power BI reports and analytics,
- one for viewing the deployment in Azure,
- and one link for deploying and configuring the Admin App.

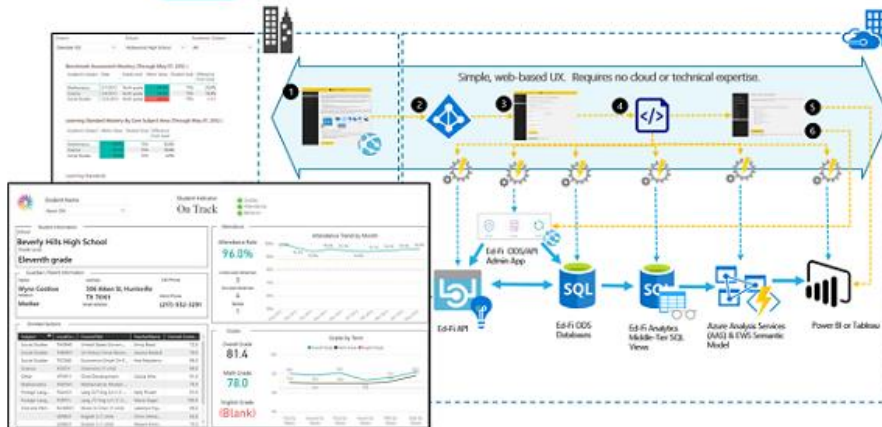Steps for utilizing each link are below:

Link #1: Power BI:

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If you are using Power BI to surface your data, please click that link in the email. The Implementation Suite opens a new browser window and automatically publishes the EWS and Assessment starting reports to your Power BI service:
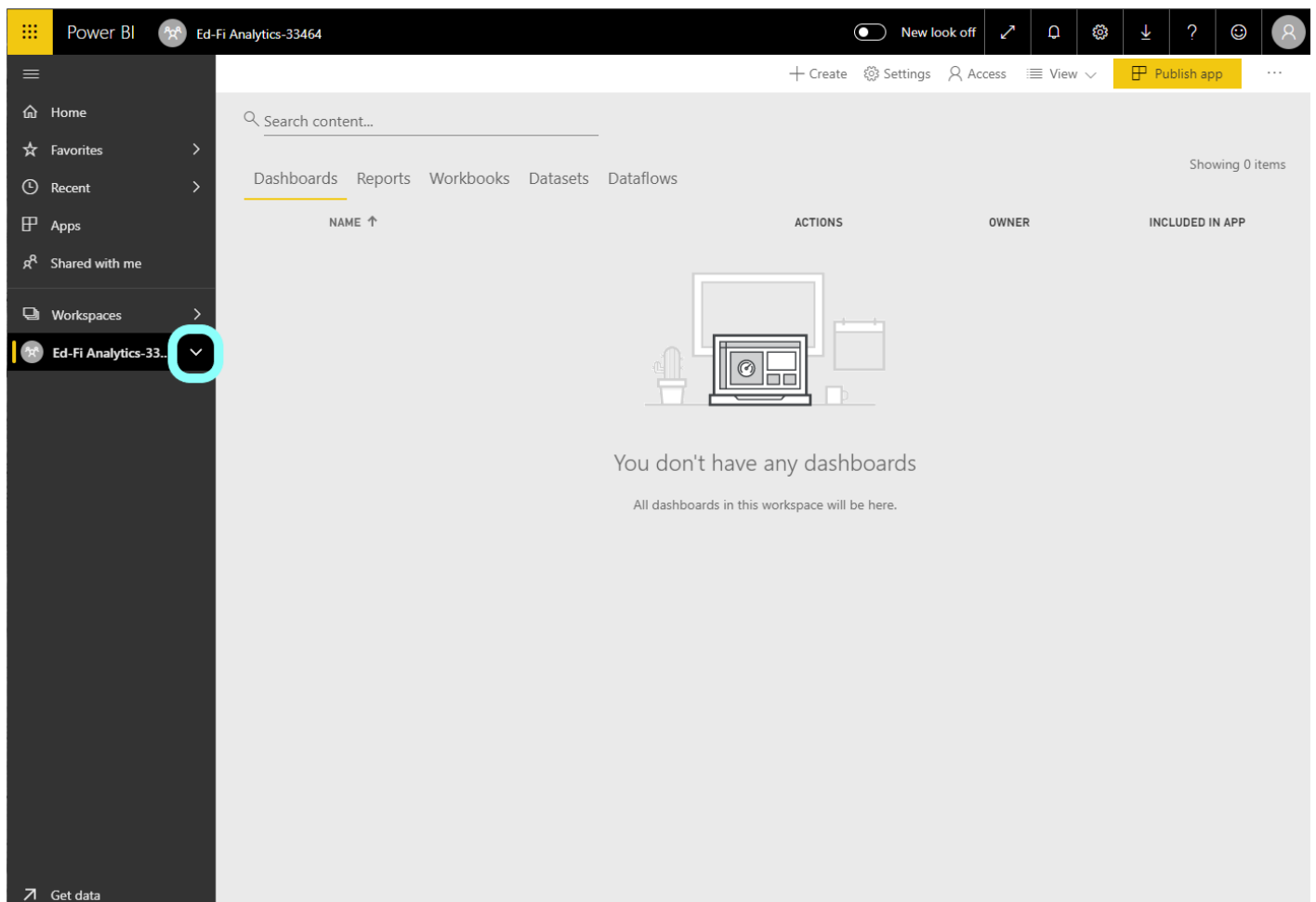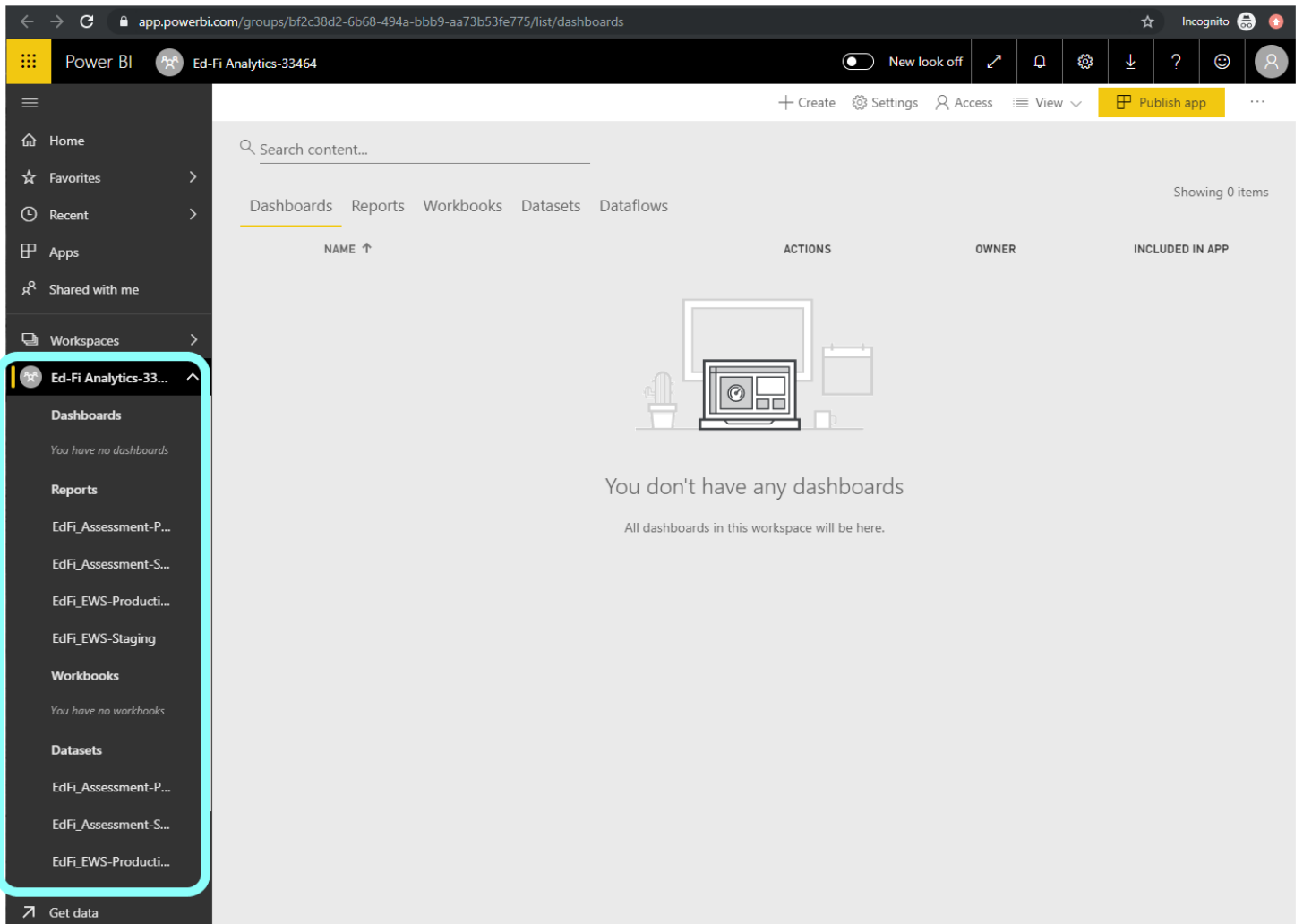

Click the **blue** link circled above to continue to Power BI. Power BI will ask for consent and then ask you to sign into Power BI.

After signing in, Power BI opens to this screen:

Click the arrow circled above to drop down the list of Reports and Datasets on the left pane:

Choose any Report to view the pre-populated dashboards. Click through the tabs along the bottom of each Report to see more.
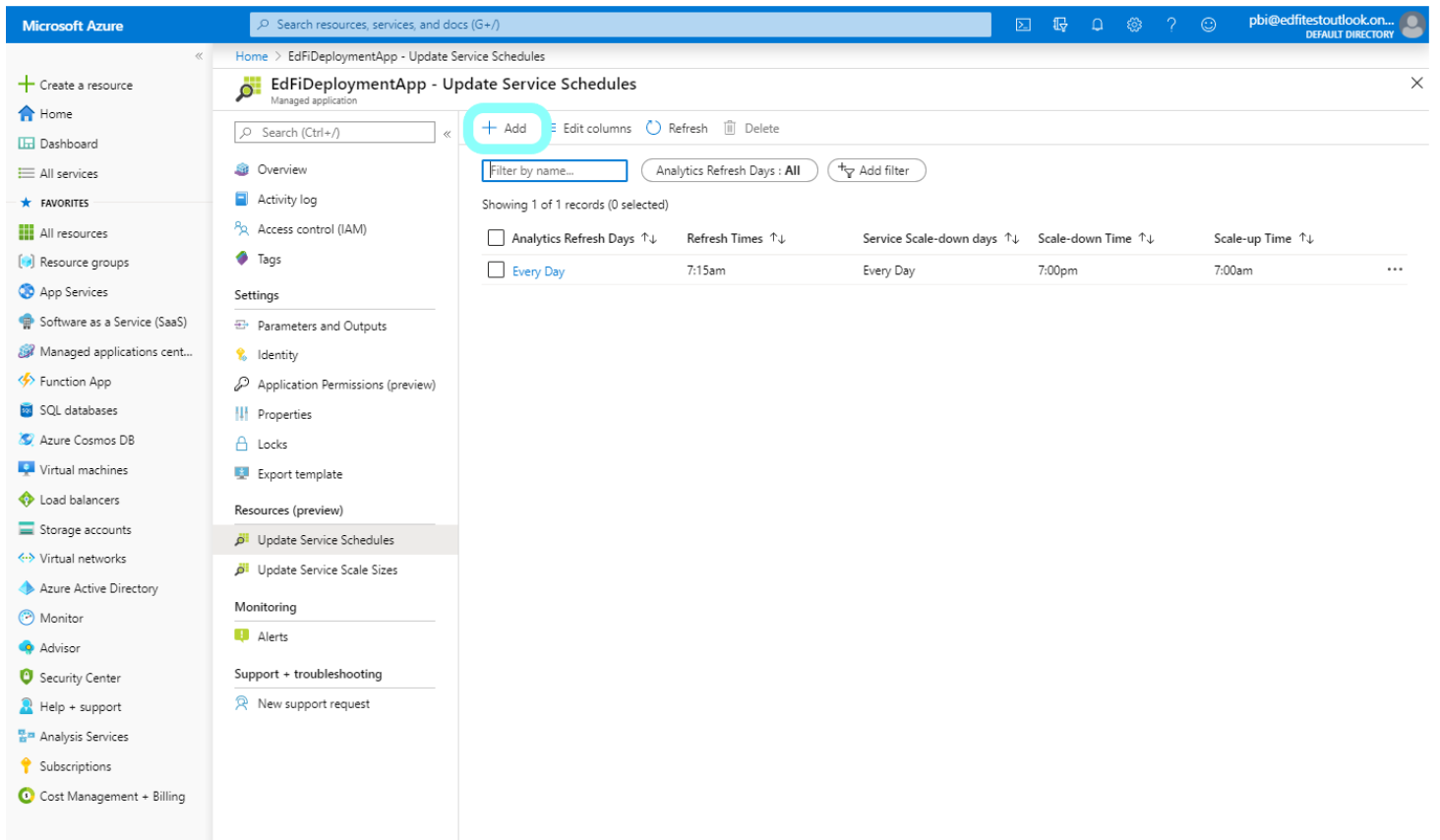
Link #2: View Deployment in Azure:

Click the link in your deployment email. A new browser will automatically open to this screen:
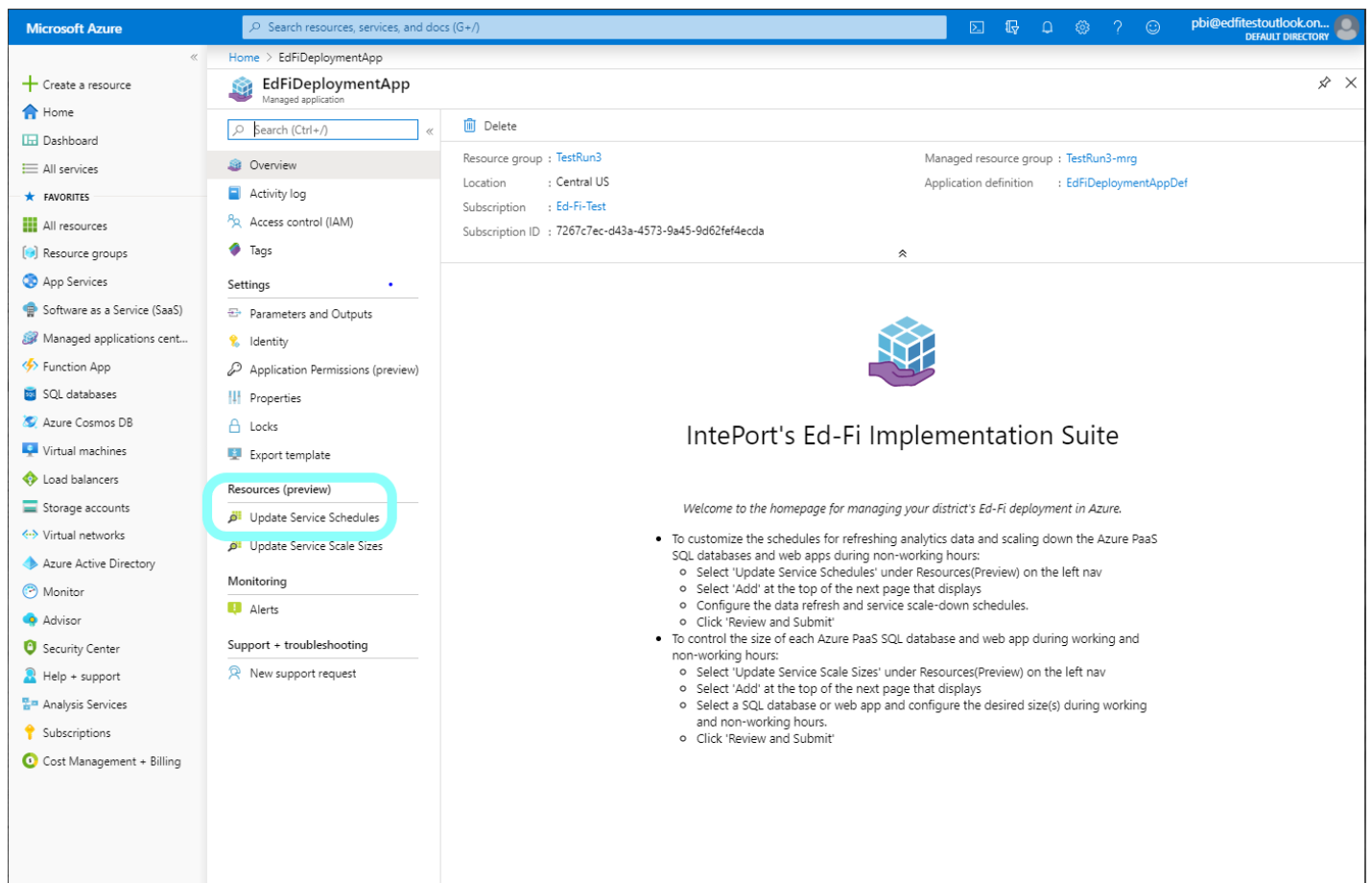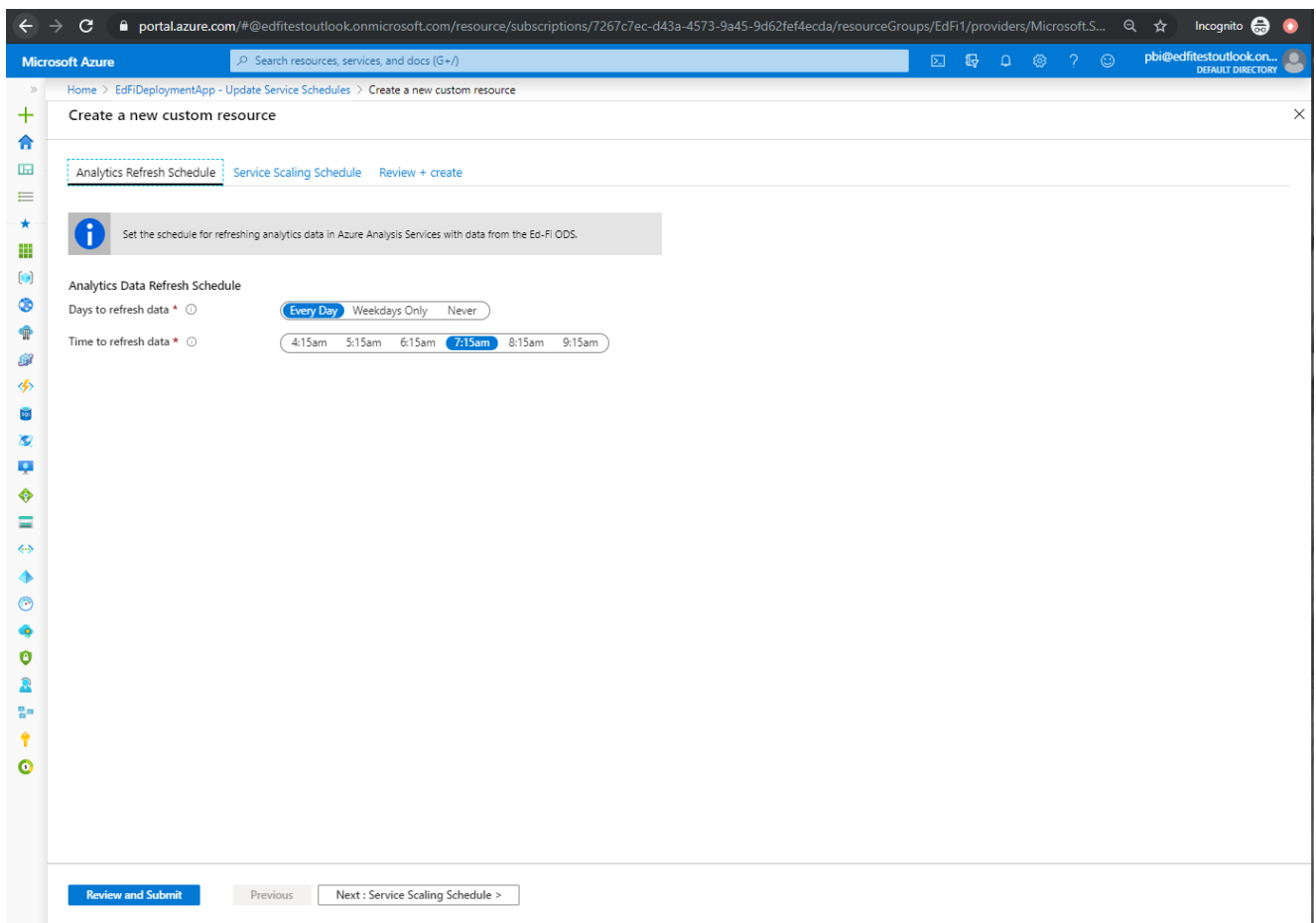

Click on the "Update Service Schedules" option circled above in blue, which takes you to this screen:

Click the "Add" button circled above to get to this screen:

Choose which days and times of day you'd like to set your data refresh schedule. If you'd like your data to update 7 days a week, click on **"Every Day"**. For most districts, **"Weekdays Only"** will be appropriate.

Then, choose the time of day you'd like your refresh to kick off by clicking on that time as shown below, and click "Next: Service Scaling Schedule" button circled below:

(Note: The days and times bubbles change from blue to purple to show they've been adjusted from the starting settings.)

This takes you to the Scale Up/Scale Down page:

Here you choose when to turn down services and when to start them back up.

For example, if your school's work day ends at 5pm and everyone has gone home by 6pm, setting your schedule to scale down at 7pm would be logical as no one is using the service until the next school day.

Then choose an appropriate time for the services to scale back up the next day and allow your data refresh to kick off. Since our example is set to kick off a data refresh at 5:15am, we set the scale up time to 5am, as shown above.

You must choose a scale-up time at least 15 minutes prior to your data refresh time or Azure will give you an error message and ask you to choose a different time.

Click "Next: Review + Create" as circled above, which takes you to the confirmation screen:
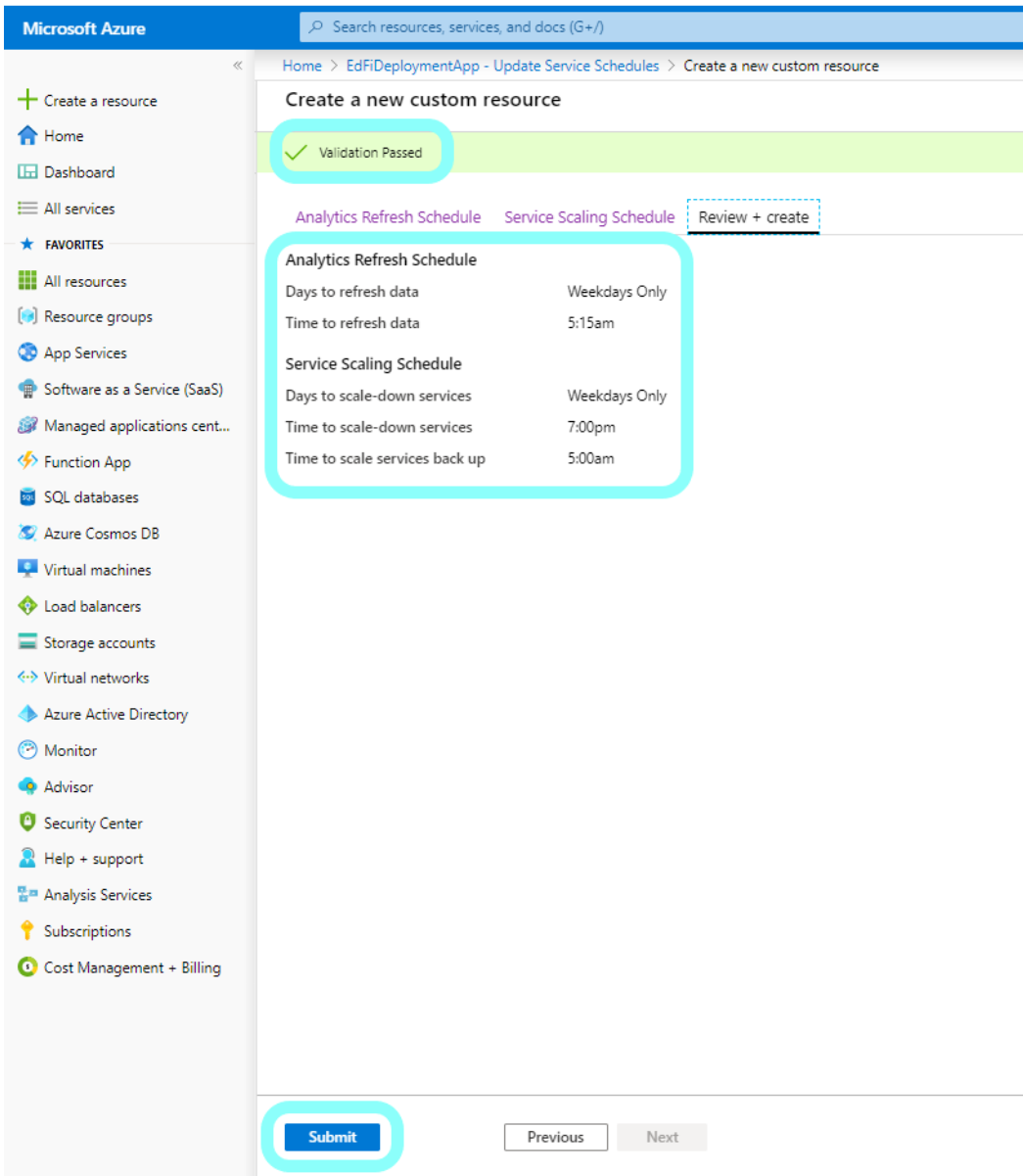
Azure confirms that your scale up/scale down times work with your data refresh time by showing a "Validation Passed" message with a green highlight as circled above and shows your current schedule. Click the blue "**Submit**" button to confirm the schedule.

Azure takes you back to the Deployment App page and creates the custom resource schedule:
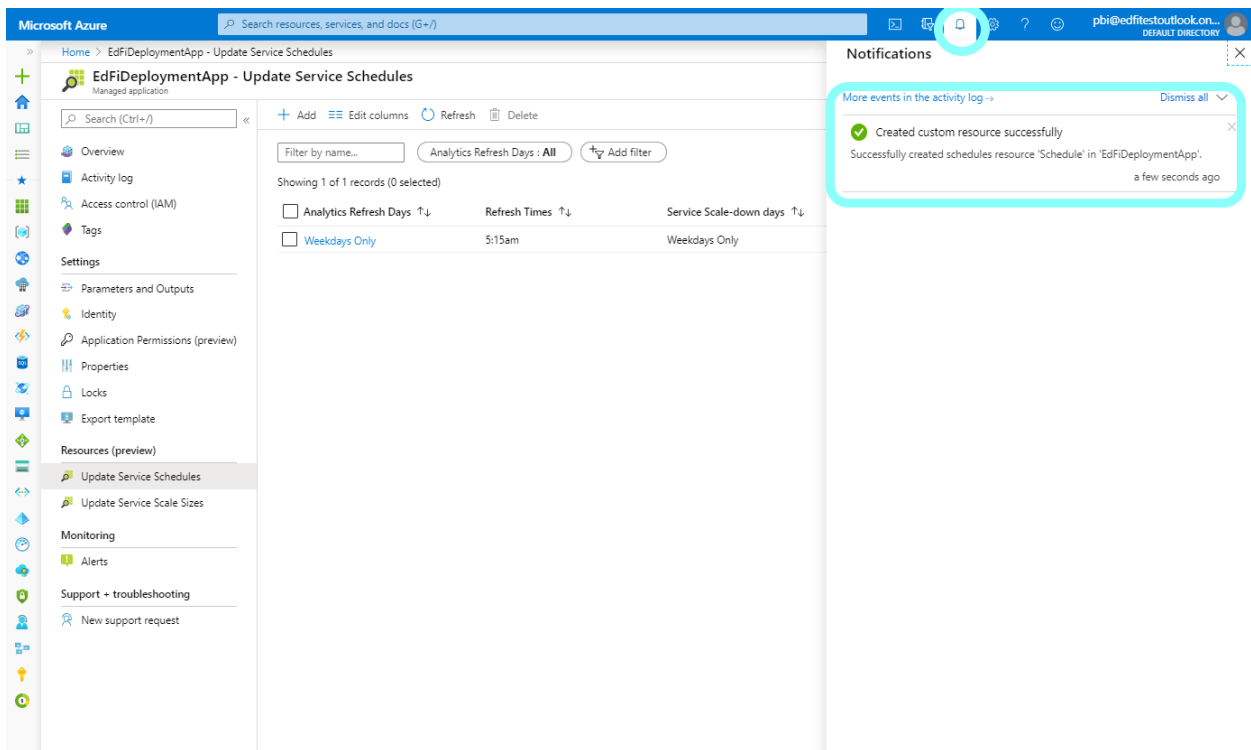
This alert sometimes will flash briefly and then close itself; if you click on the bell icon circled above, the alert will open and show you that the resource schedule is being or has been created. You can adjust these scale up/scale down/data refresh settings as needed.

Link #3: Deploy & Configure the Admin App:

Click on Admin App link in follow up email. A new browser window will open to Azure and a pop-up will ask for consent:
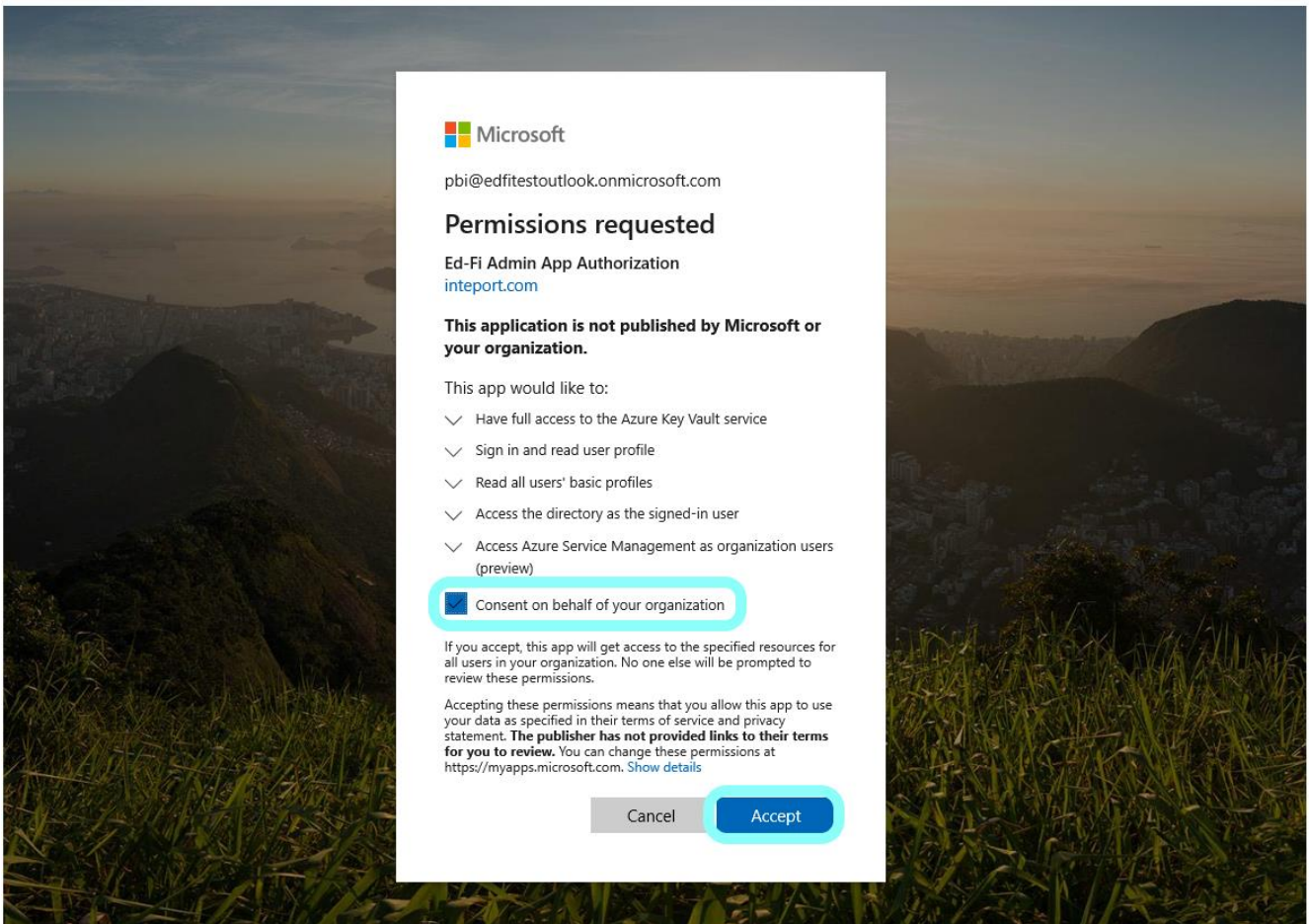

Click the consent box as circled above and click on the blue "**Accept**" button.

Azure will redirect to the Admin App deployment screen. On the Resource Group drop-down menu, choose the RG name used in the initial deployment plus "**-mrg**" as circled below:
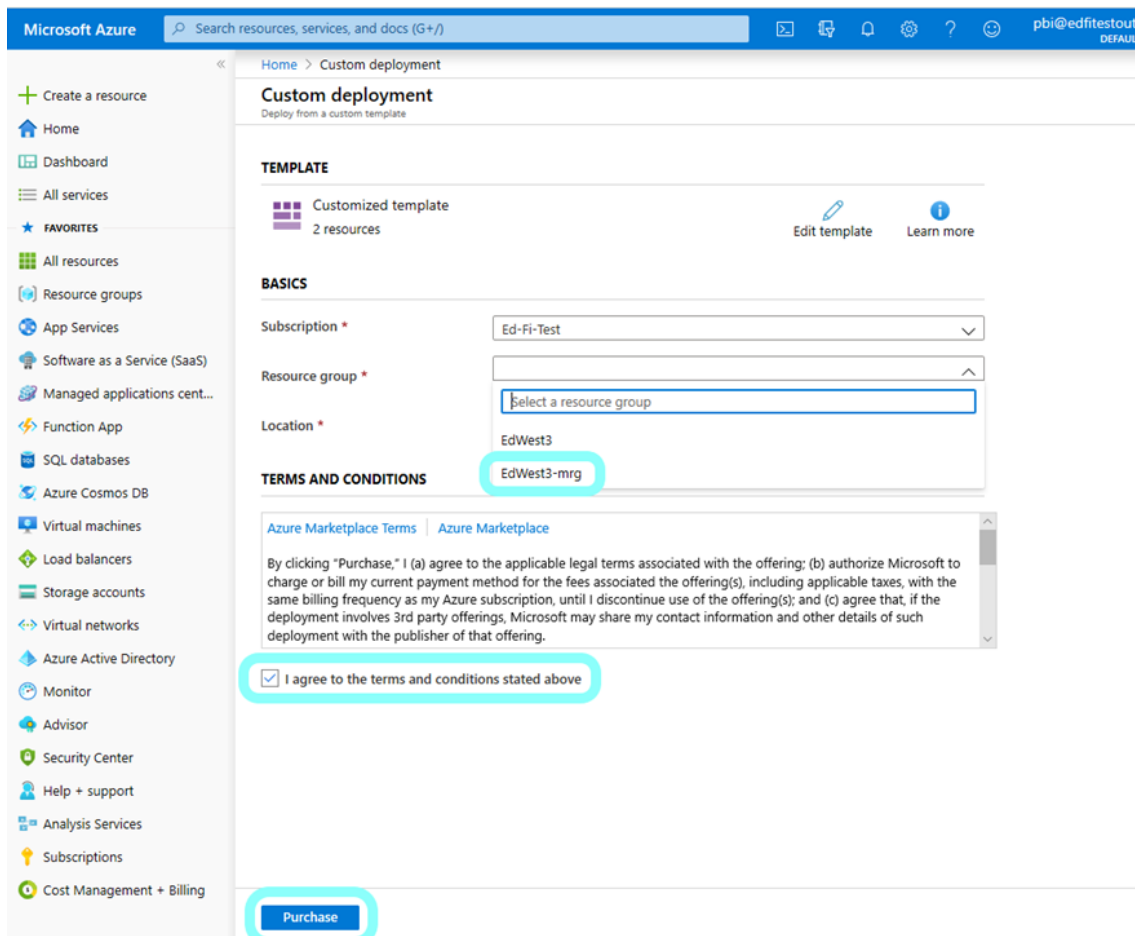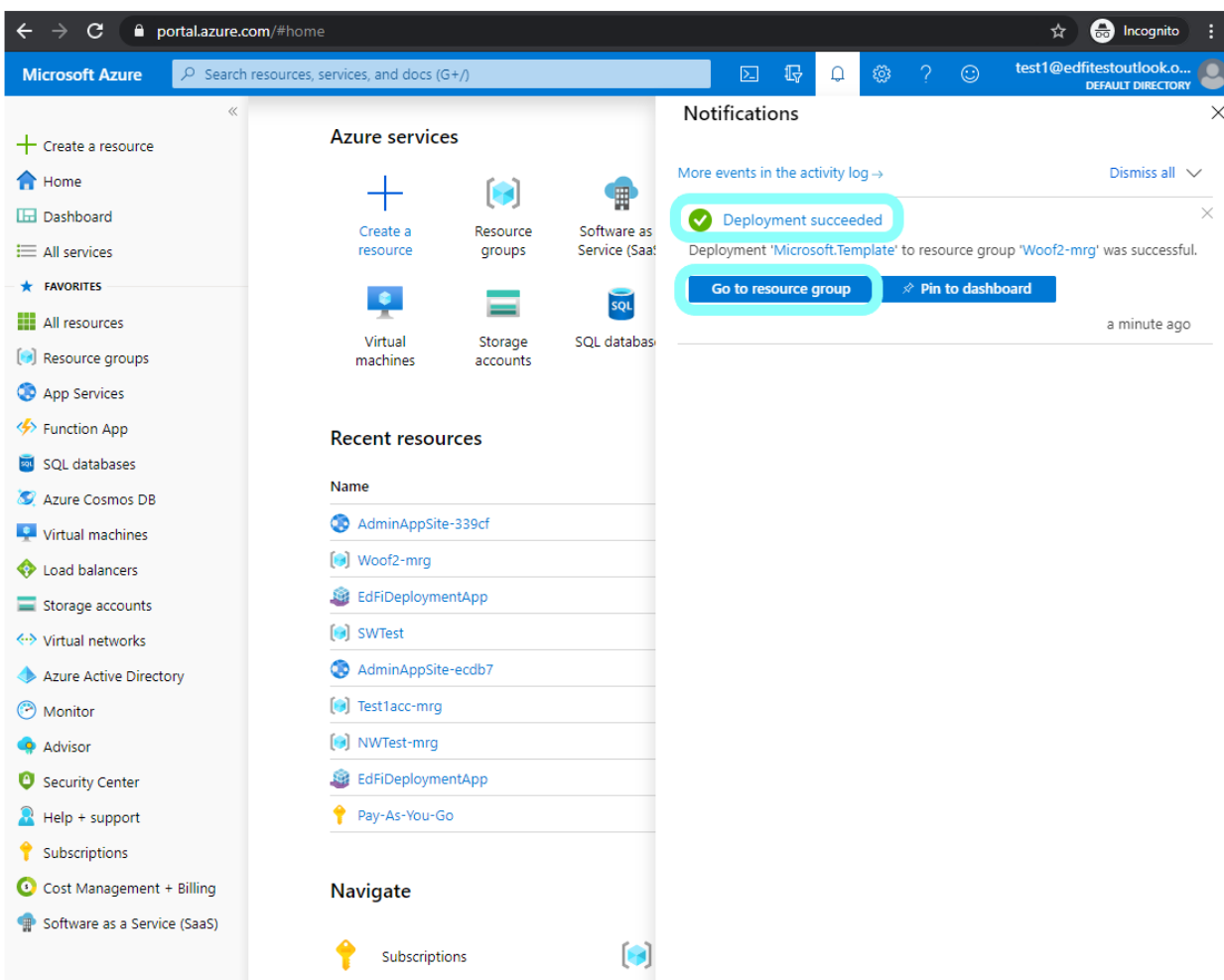

Click the "I agree…" box and click the blue "**Purchase**" button as circled above.

Azure changes to this screen and begins deploying the resource group:
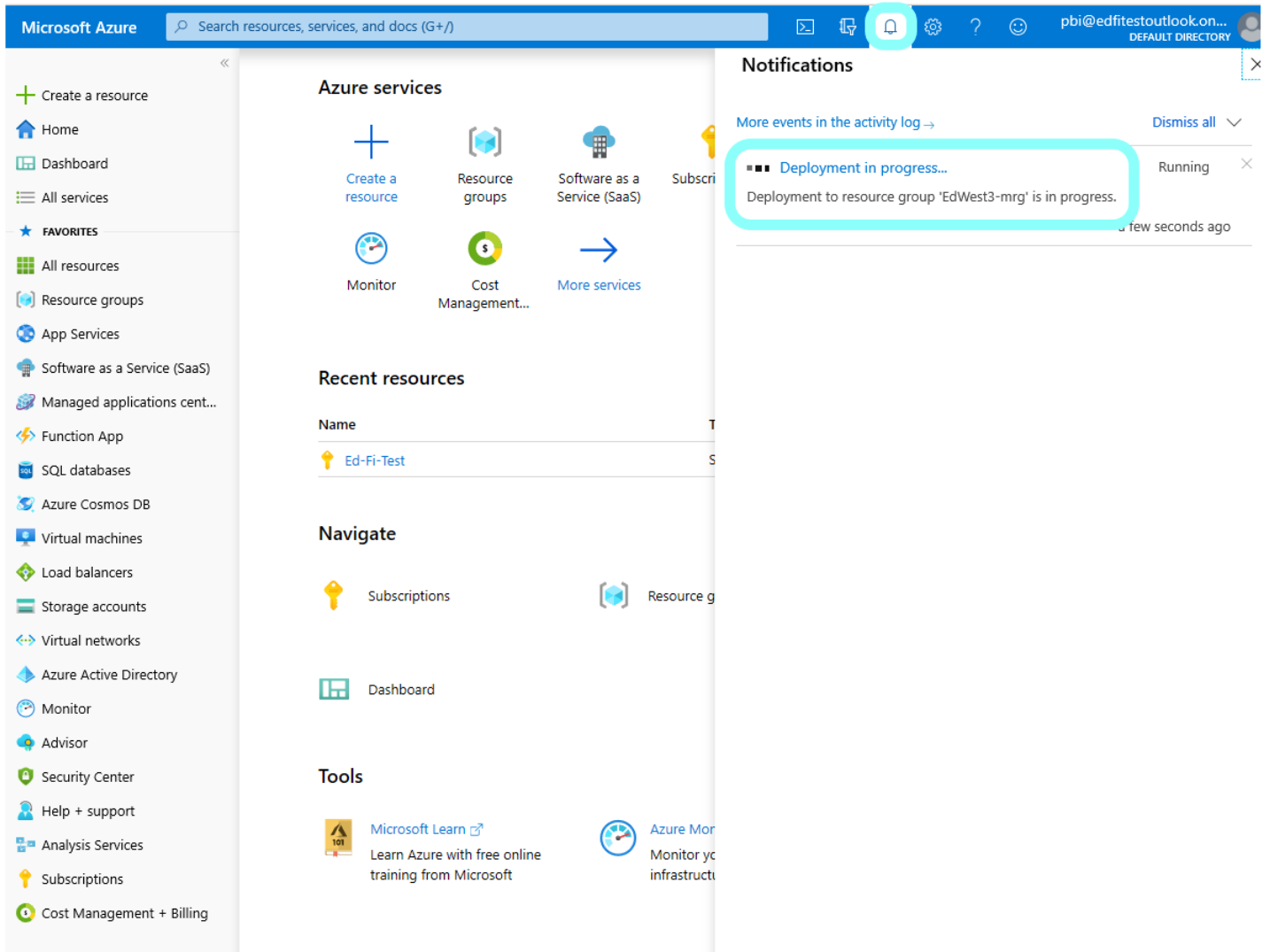
Click the bell icon circled above to keep the "Notifications" pane open and see the deployment progress display and update.


When deployment has finished, a green circle and check mark appear in the "Notifications" window, and "Deployment Succeeded" displays. Click on the blue "Go To Resource Group" button as circled above.

Azure redirects to the RG page and lists the contents of the RG. Find and click the "AdminAppSite" name-link as circled below:
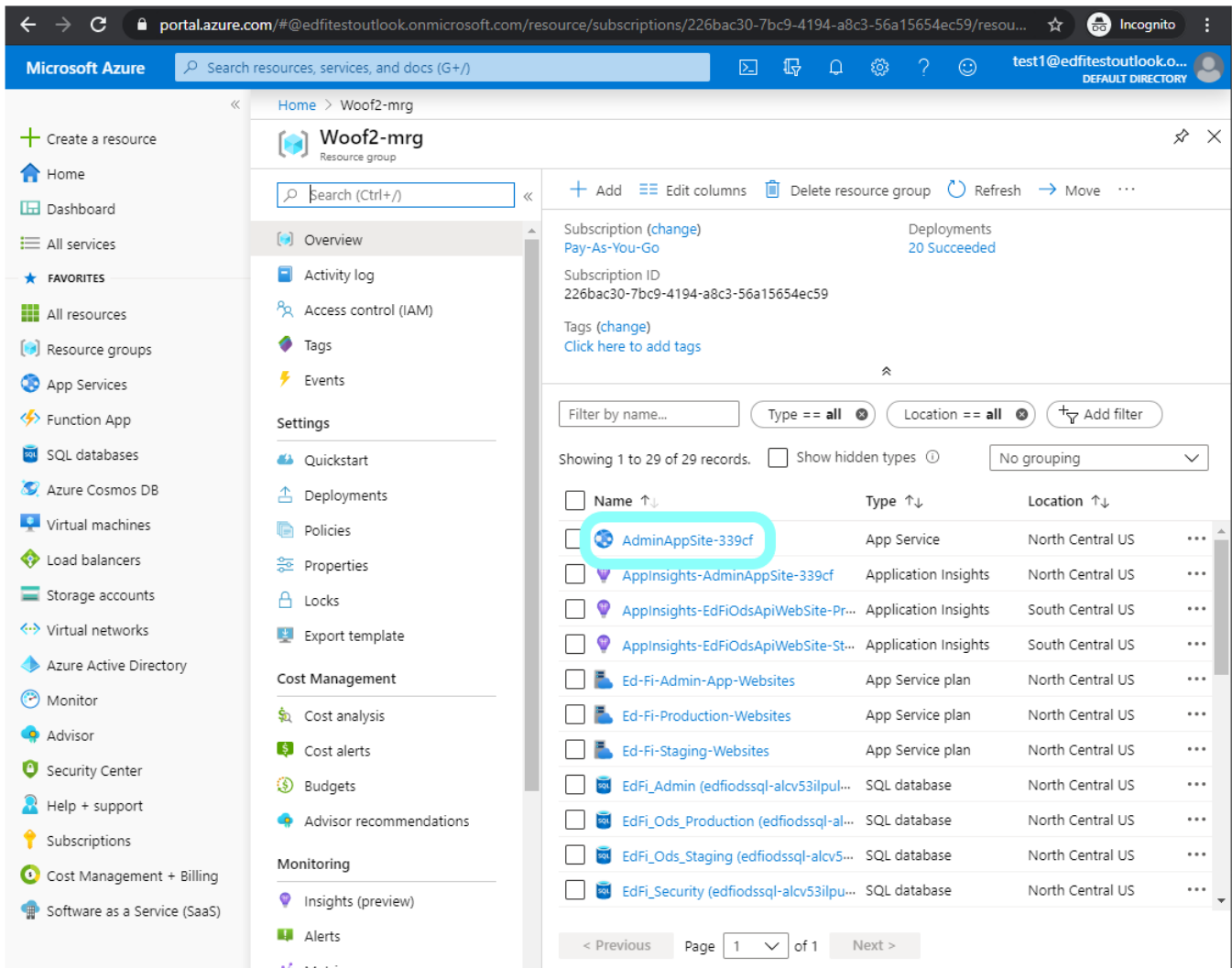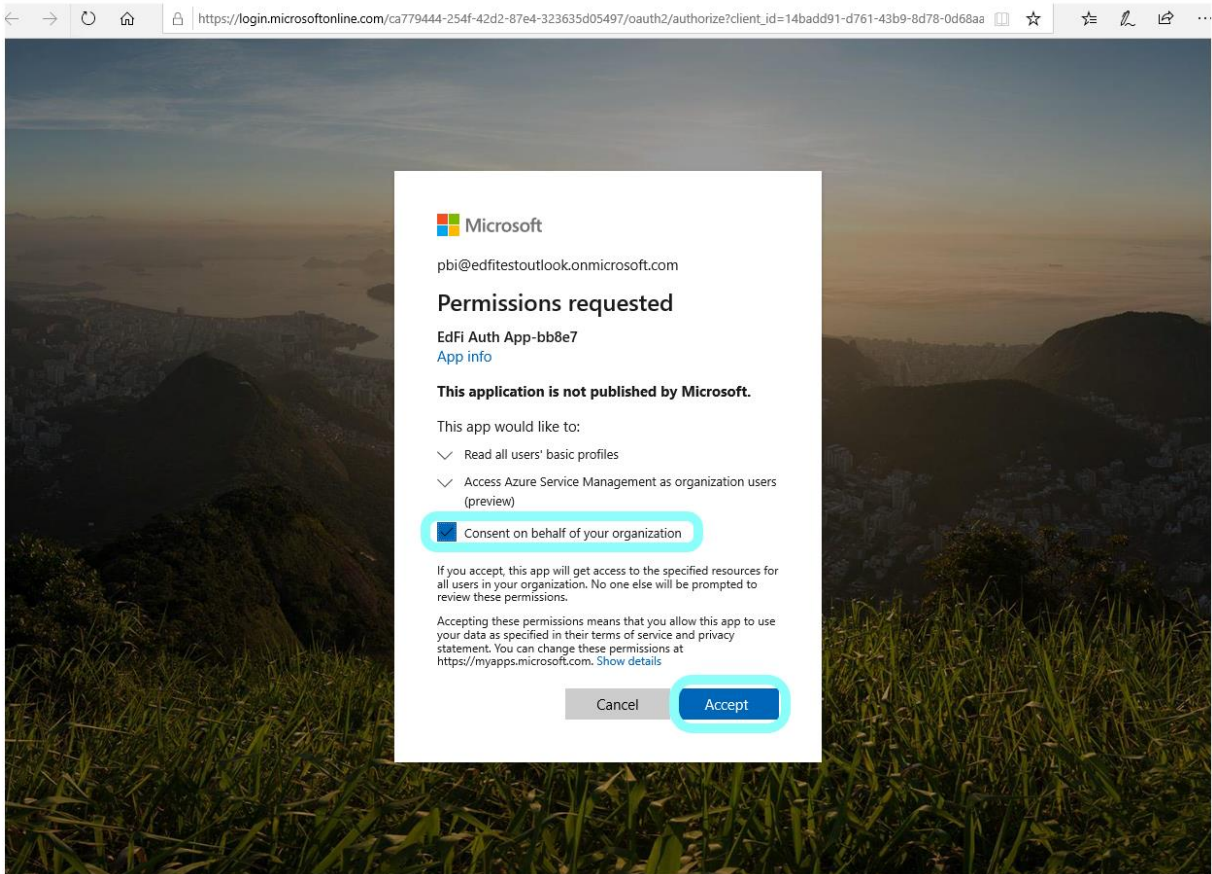
Azure redirects to the AdminAppSite page and shows the details of the page. In the upper left area of the details screen is the URL link to the Admin App site, as circled below. Click the link.
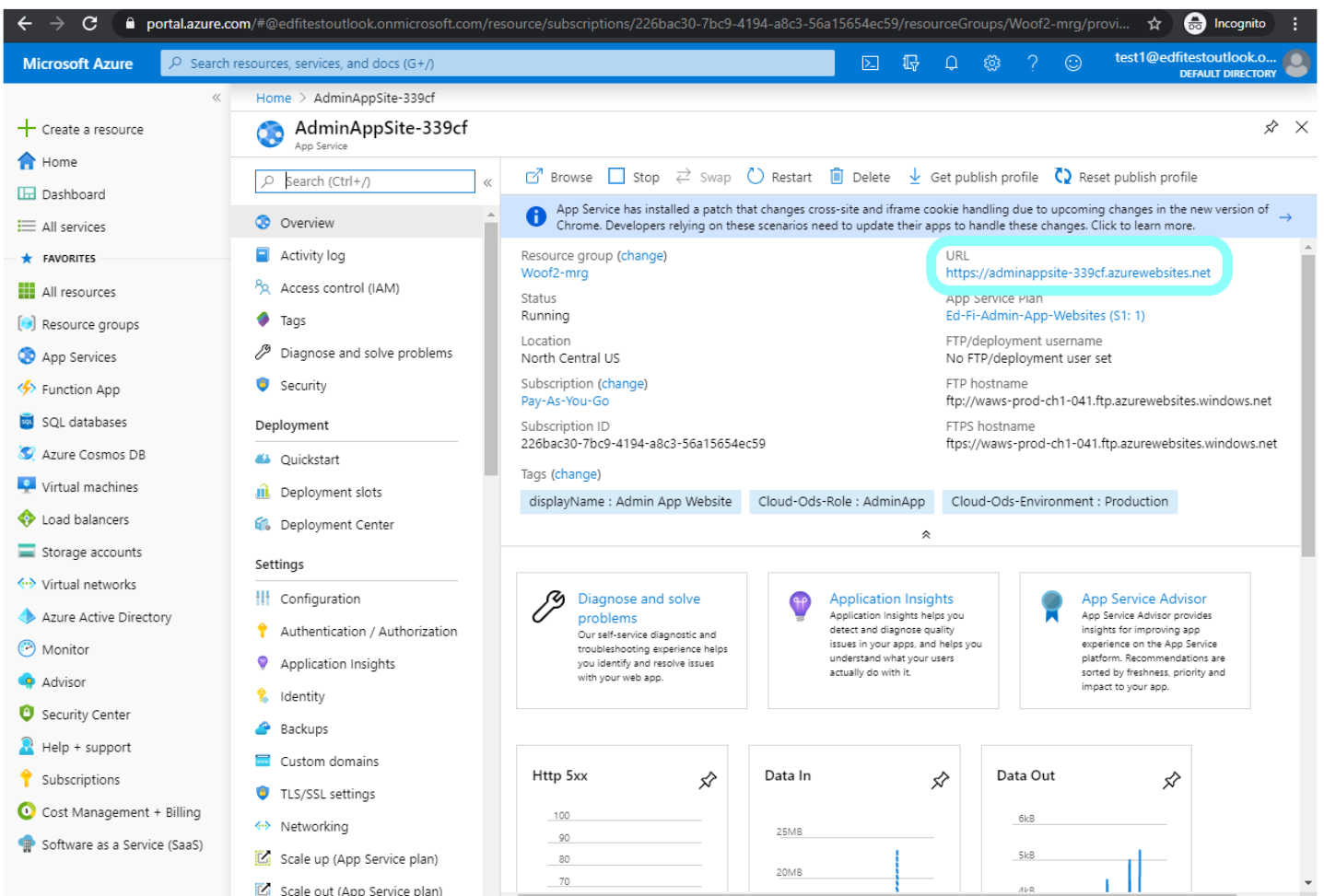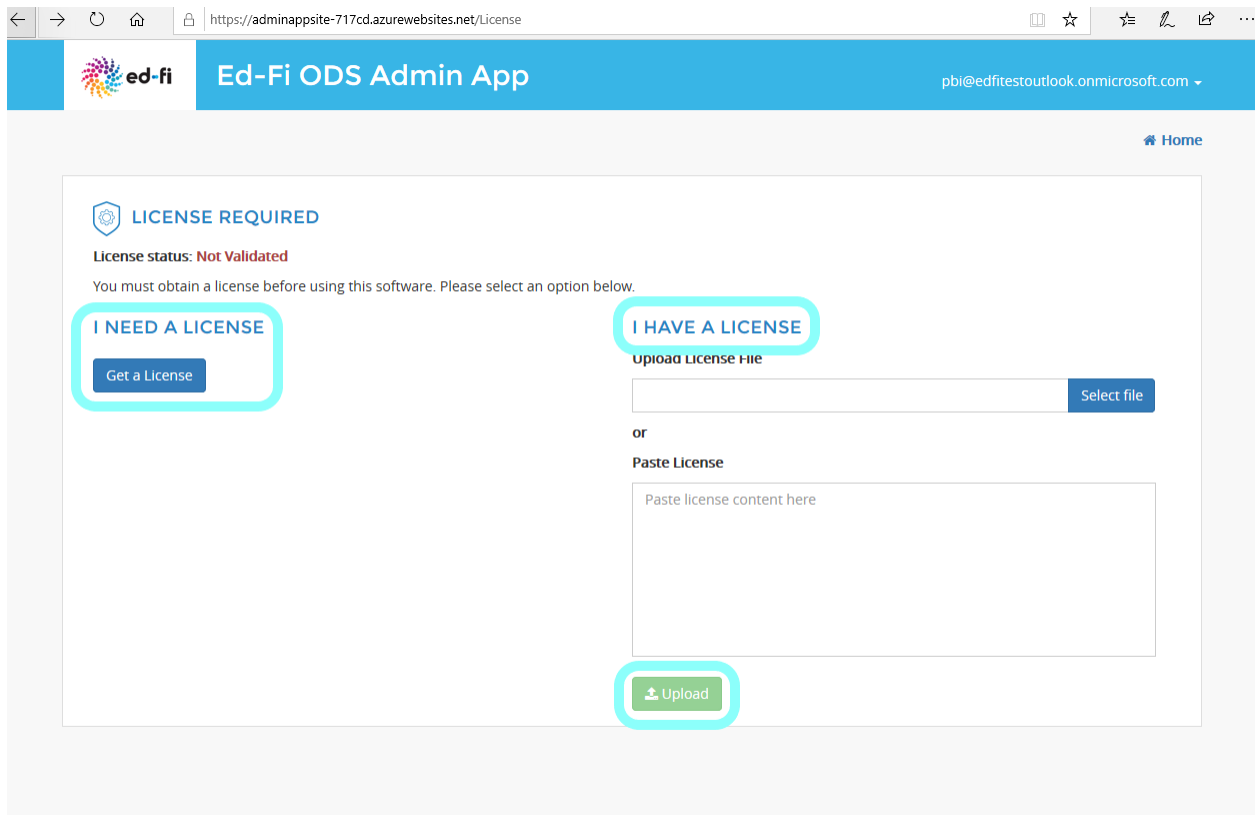

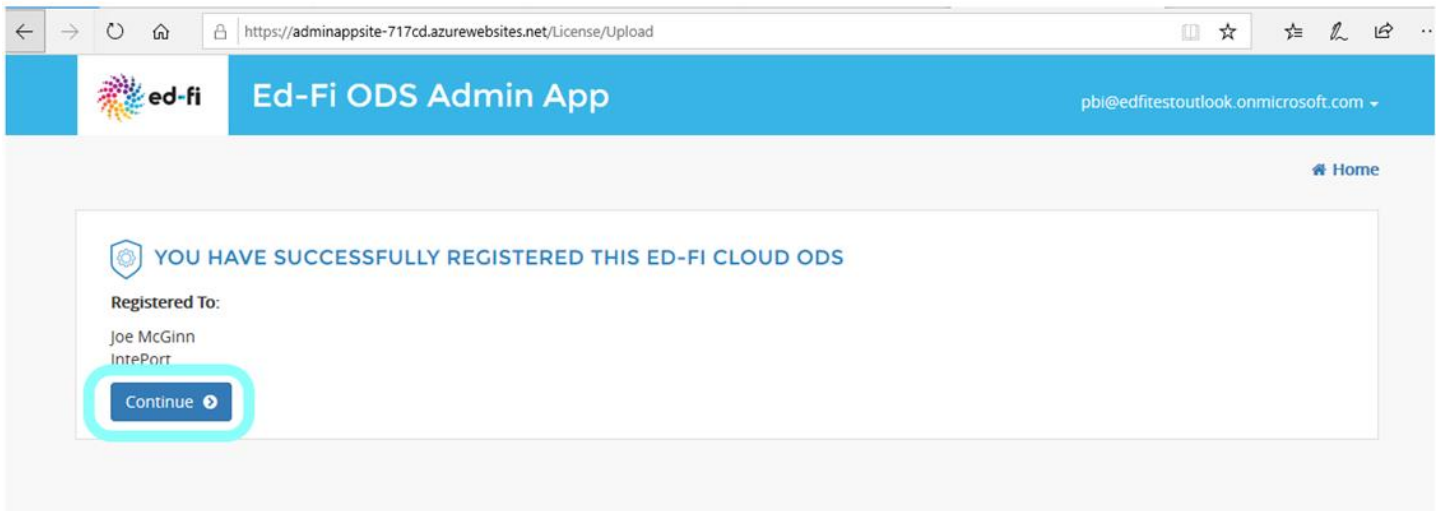A new browser window will open and take you to this screen:

Click the box to accept the consent and click the blue "**Accept**" button, as circled above.
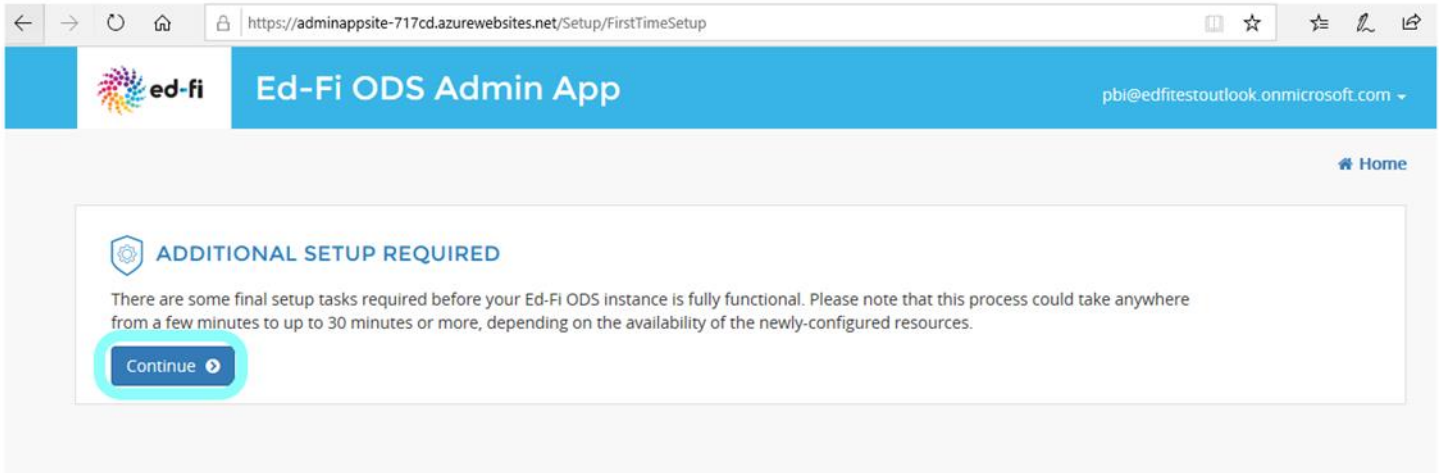
The browser will redirect to the Ed-Fi ODS Admin App page and asks for a license key. Obtain and upload your license and then click the green "**Upload**" button:

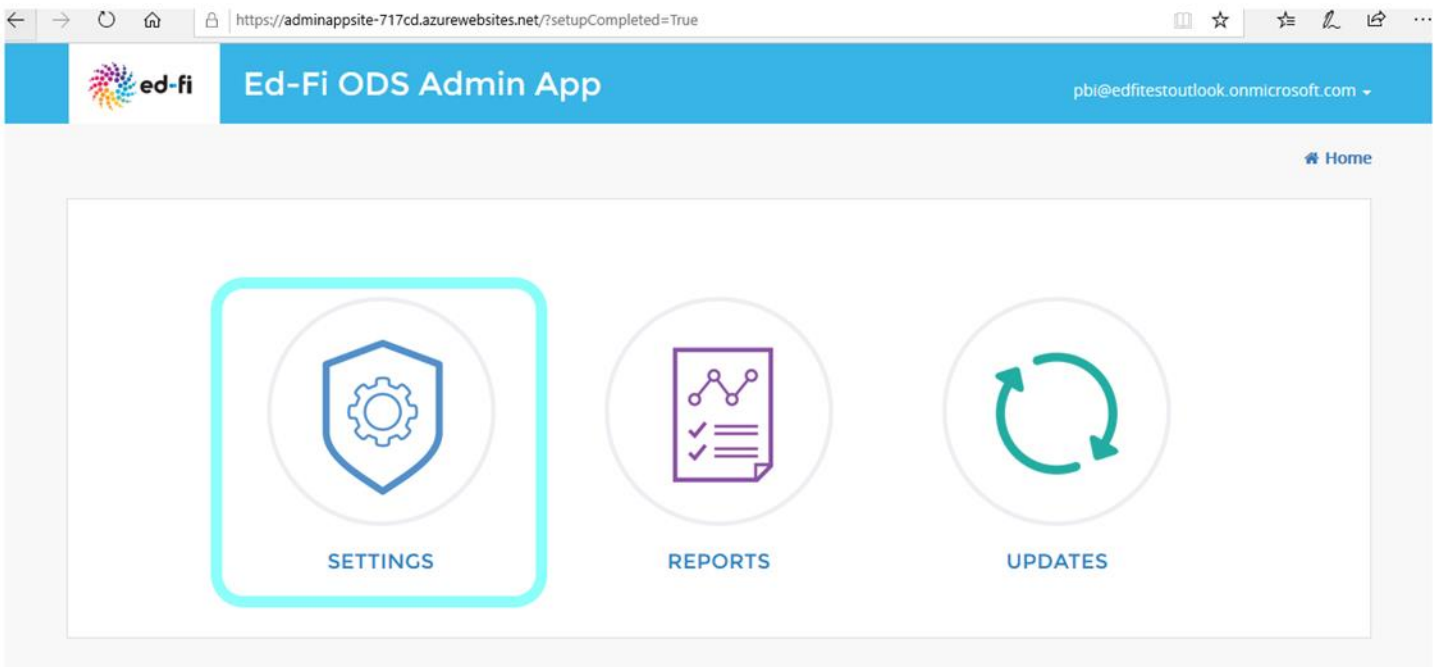Upon successful upload, you'll see this screen:

Click the blue "**Continue**" button circled above. This takes you to this screen:
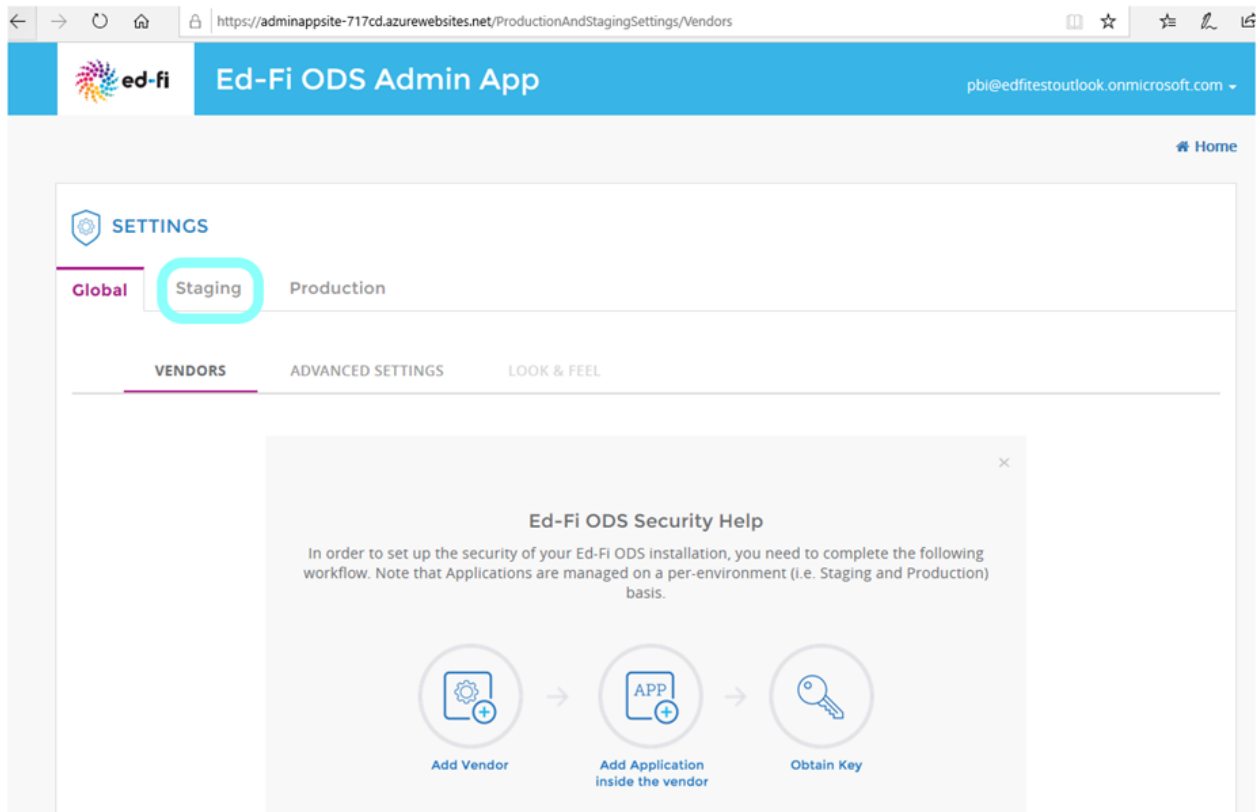

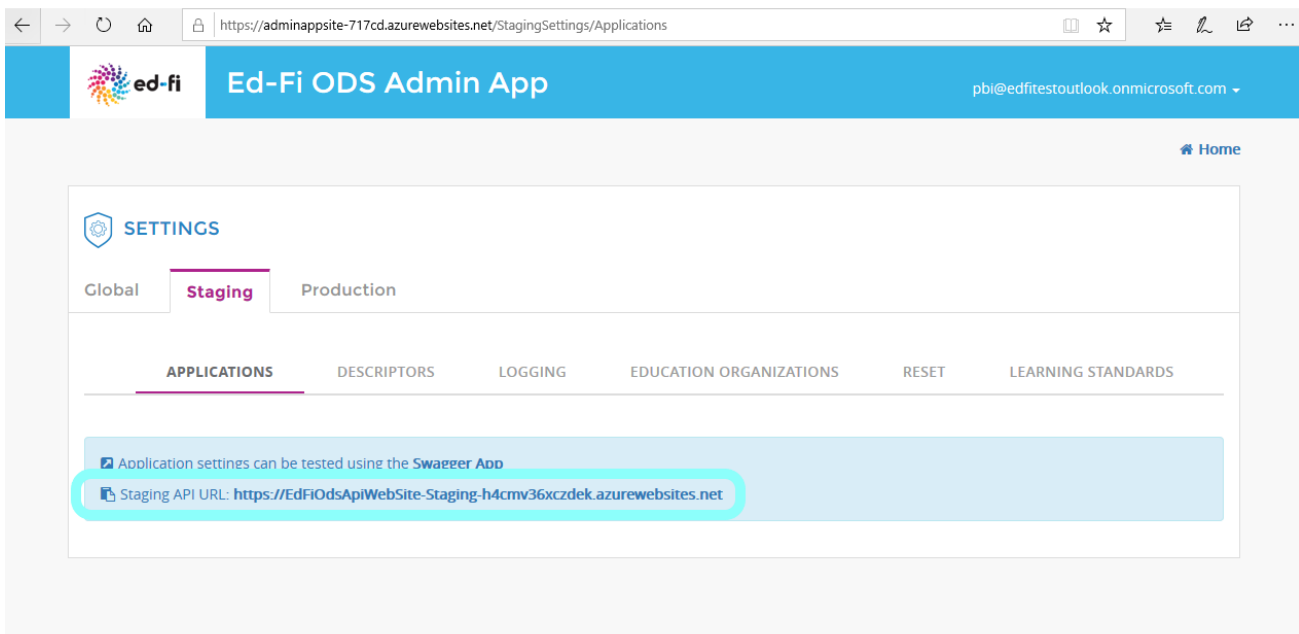Click the blue "**Continue**" button and wait for the process to complete.

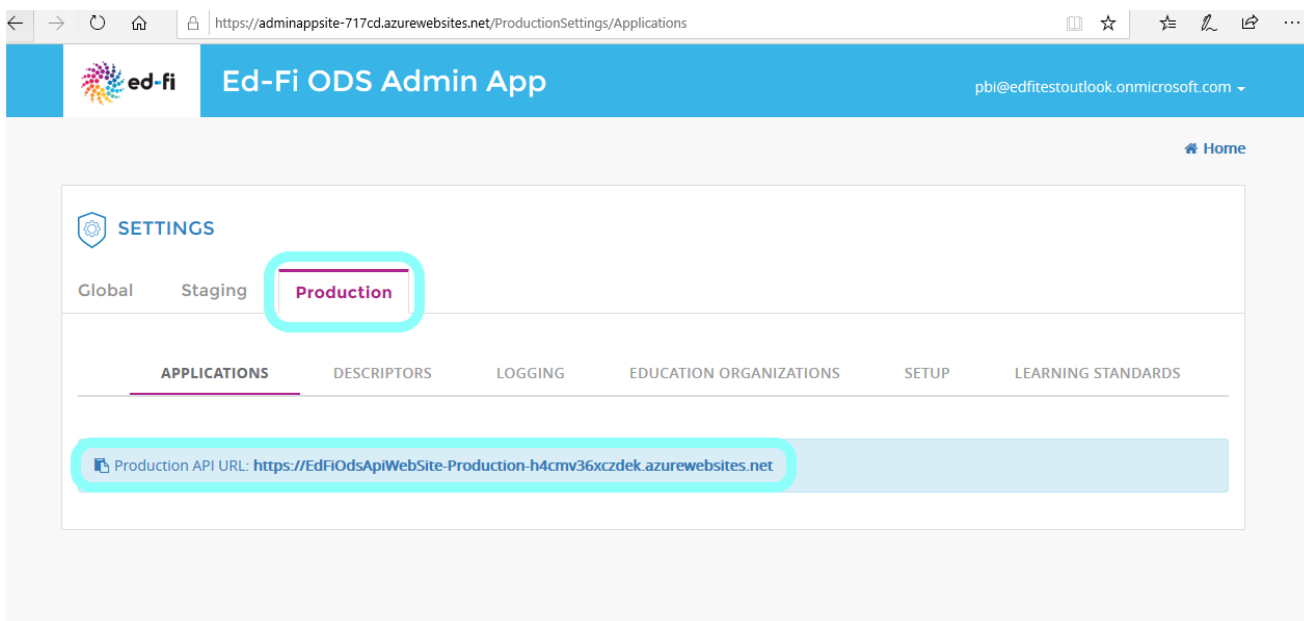Upon completion, you will see this screen:

Click the "Settings" circled above, which takes you to the screen below, then click on the "Staging" tab circled below:

Make certain the Staging tab looks like this circled below:

Then click on the "Production" tab and do the same:

Your deployment of IntePort's Ed-Fi Implementation Suite is complete.