

Skyward Tips & Tricks WISEdata Finance (Qmlativ & SMS) Craig Schafer

State & Federal Compliance Analyst



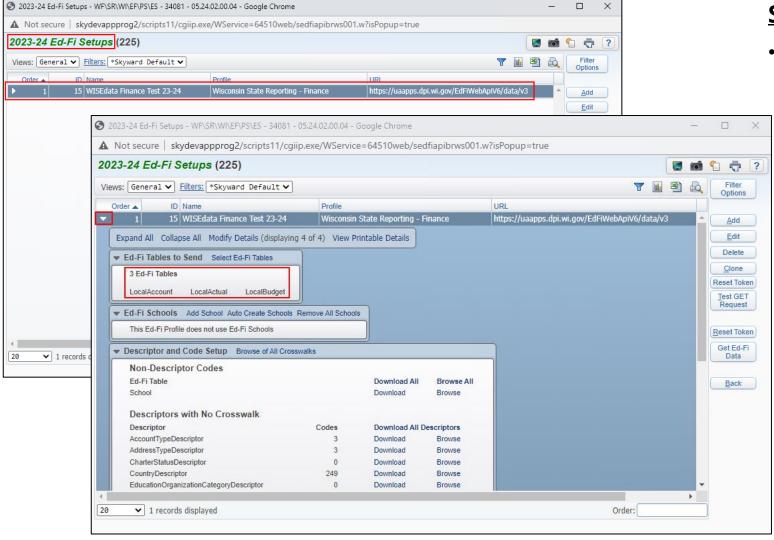
Skyward Tips & Tricks (Qmlativ & SMS)

- Ed-Fi Application Setup
- Test GET Request
- Redownloading the Chart of Accounts
- Using Overrides and Manual Mapping
- Cloning Ed-Fi Applications and Setups
- Utilizing Scheduled Tasks
- Account Mapping/Not Reported Accounts Reports
- Utilizing Data by Subject

Agenda



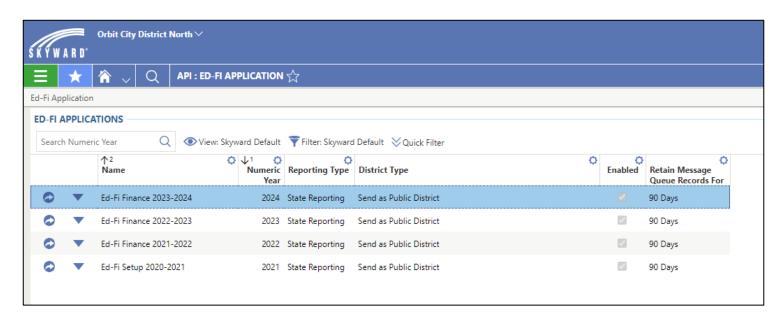
Tip #1: Only create one Ed-Fi Setup or Application per fiscal year.



- Web Financial Management >
 Federal/State Reporting > Wisconsin
 State Reporting > Ed-Fi > Setup > Ed-Fi
 Setup
 - Only one Ed-Fi Setup is required for each fiscal year.
 - Both actual and budget data are sent every time the Mass Send processes are run, so more than one Ed-Fi Setup is not needed.



Tip #1: Only create one Ed-Fi Setup or Application per fiscal year.

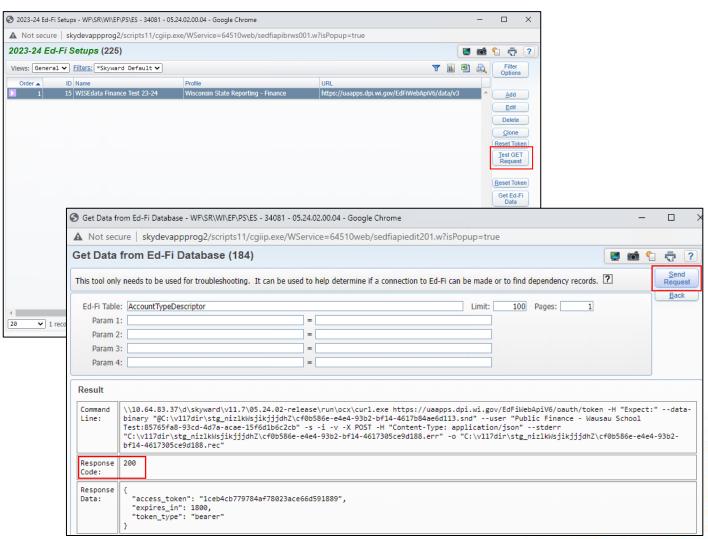


- Menu > Administrative Access > API > Features > Ed-Fi Application
 - Only one Ed-Fi Application is required for each Numeric Year (fiscal year).
 - Both actual and budget data are sent every time the Update Ed-Fi Local Accounts and Mass Send processes are run, so more than one Ed-Fi Application is not needed.



Tip #2: Utilize the Test GET Request and Test Live URL processes to test your connection with DPI's API.

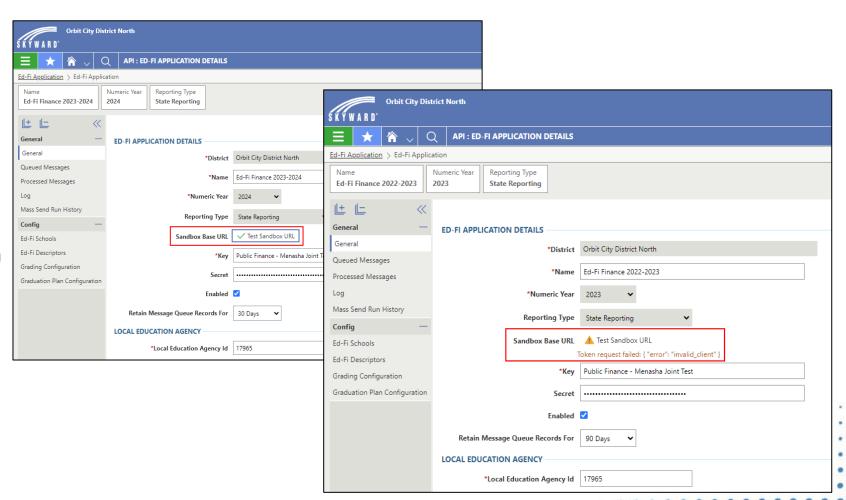
- Web Financial Management >
 Federal/State Reporting > Wisconsin
 State Reporting > Ed-Fi > Setup > Ed-Fi
 Setup
 - If the Response Code is "200," then your connection to DPI's API is good.
 - If the Response Code is anything other than "200," then check your Key, Secret, and Local Education Agency ID within your Ed-Fi Setup to ensure they are correct.





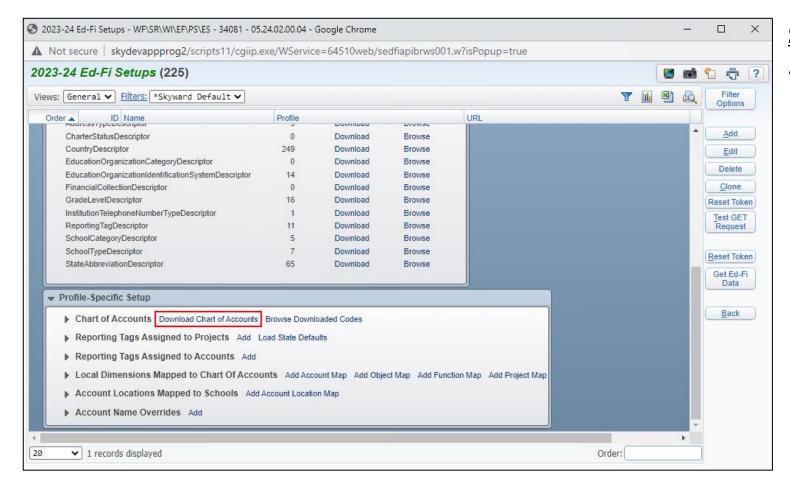
Tip #2: Utilize the Test GET Request and Test Live URL processes to test your connection with DPI's API.

- Menu > Administrative Access > API > Features > Ed-Fi Application
 - If a green checkmark appears, then your connection to DPI's API is good.
 - If a yellow triangle with an exclamation point in it appears, then check your Key, Secret, and Local Education Agency ID within your Ed-Fi Application to ensure they are correct.





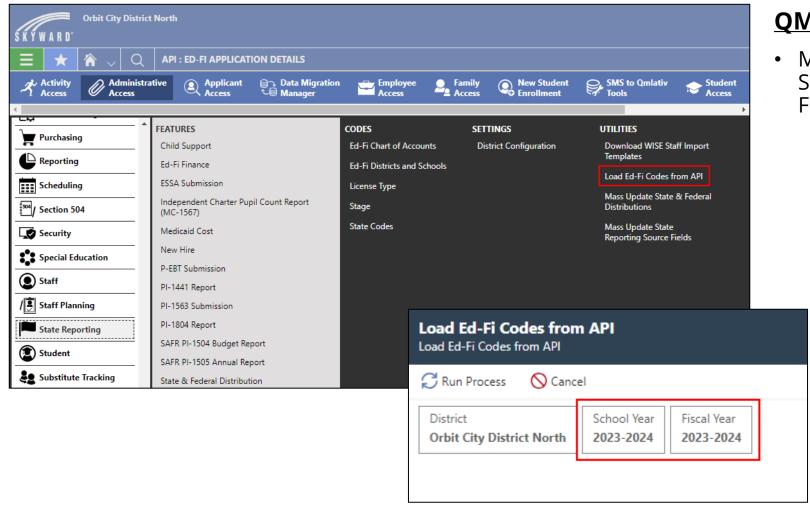
Tip #3: Redownload the state's Chart of Accounts as needed to ensure the correct accounts are being sent.



- Web Financial Management >
 Federal/State Reporting > Wisconsin
 State Reporting > Ed-Fi > Setup > Ed-Fi
 Setup
 - If DPI updates their Chart of Accounts mid-fiscal year or if DPI gives your district access to restricted accounts you did not have access to before, you will need to re-download the Chart of Accounts to ensure the appropriate accounts get sent to the state.



Tip #3: Redownload the state's Chart of Accounts as needed to ensure the correct accounts are being sent.

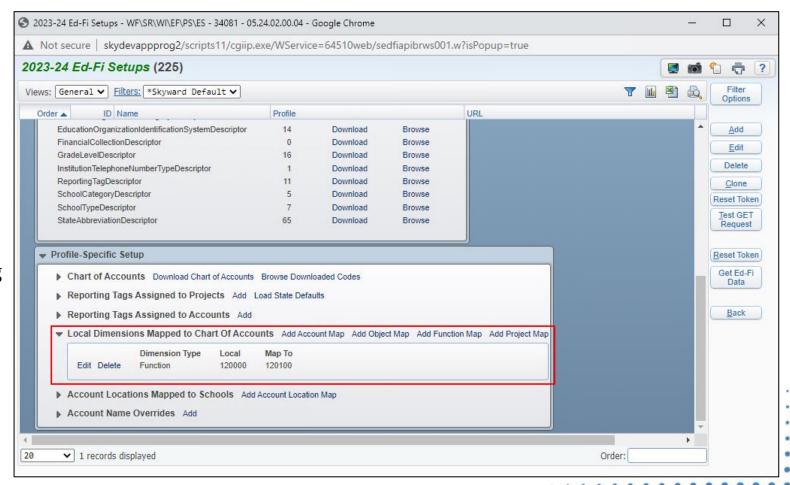


- Menu > Administrative Access >
 State Reporting > Utilities > Load Ed
 Fi Codes from API
 - If DPI updates their Chart of Accounts mid-fiscal year or if DPI gives your district access to restricted accounts you did not have access to before, you will need to rerun the Load Ed-Fi Codes from API utility to ensure the appropriate accounts get sent to the state.



Tip #4: Use Account Mapping and Ed-Fi Dimension Code Overrides sparingly.

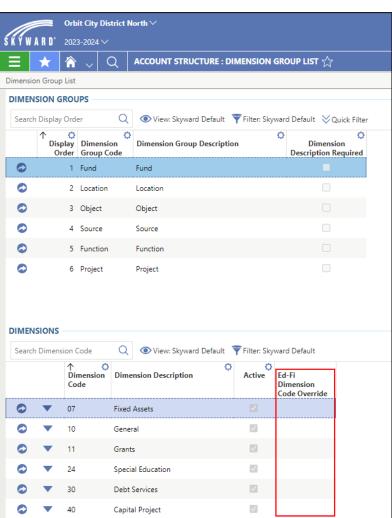
- Web Financial Management >
 Federal/State Reporting > Wisconsin
 State Reporting > Ed-Fi > Setup > Ed-Fi
 Setup
 - Account, Object, Function, and Project Maps should only be used in emergencies or if an Account Merge or Journal Entry cannot be done to fix an account so it sends appropriately.
 - Skyward always recommends updating your Chart of Accounts if accounts you have are not in a proper WUFAR format.





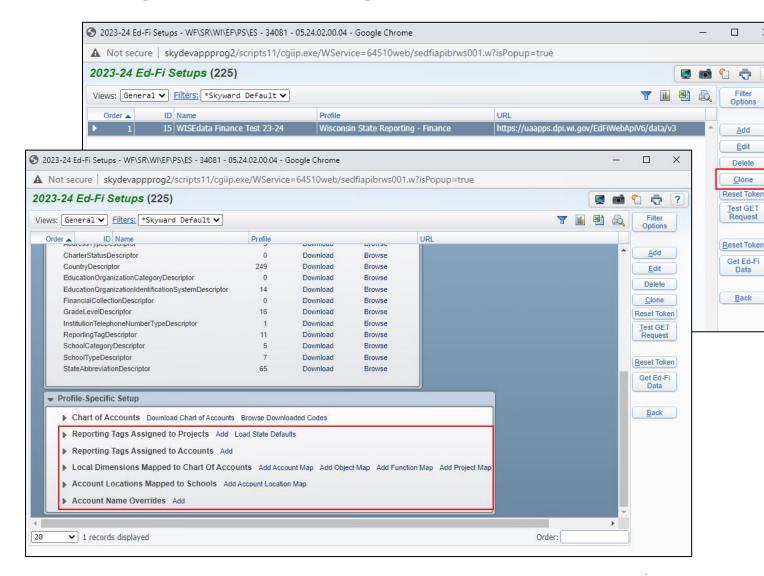
Tip #4: Use Account Mapping and Ed-Fi Dimension Code Overrides sparingly.

- Menu > Administrative Access > Account > Codes > Dimension
 - Fund, Object, Source, and Function Ed-Fi
 Dimension Code Overrides should only be
 used in emergencies or if an Account Merge
 or Journal Entry cannot be done to fix an
 account so it sends appropriately.
 - Skyward always recommends updating your Chart of Accounts if accounts you have are not in a proper WUFAR format.





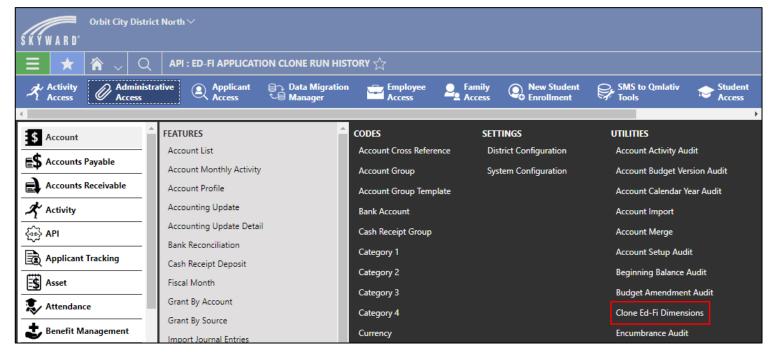
Tip #5: Clone your Ed-Fi Setups and Applications from fiscal year to fiscal year to save time.



- Web Financial Management >
 Federal/State Reporting > Wisconsin
 State Reporting > Ed-Fi > Setup > Ed-Fi
 Setup
 - The Clone process clones your Ed-Fi Setup information (Key, Secret, Local Education Agency ID, etc.) as well as much of the Profile-Specific Setup within your Ed-Fi Setup from one fiscal year to the next.
 - You will still need to download the Non-Descriptor School Codes, Descriptors with No Crosswalk, and Chart of Accounts each fiscal year.



Tip #5: Clone your Ed-Fi Setups and Applications from fiscal year to fiscal year to save time.



QMLATIV

- Menu > Administrative Access > API > Utilities > Clone Ed-Fi Applications
 - This clone process clones your Ed-Fi Application from one fiscal year to the next.
- Web Financial Management >
 Federal/State Reporting > Wisconsin
 State Reporting > Ed-Fi > Setup > Ed Fi Setup
 - This clone process clones the Ed-Fi info attached to your account dimensions from one fiscal year to the next.

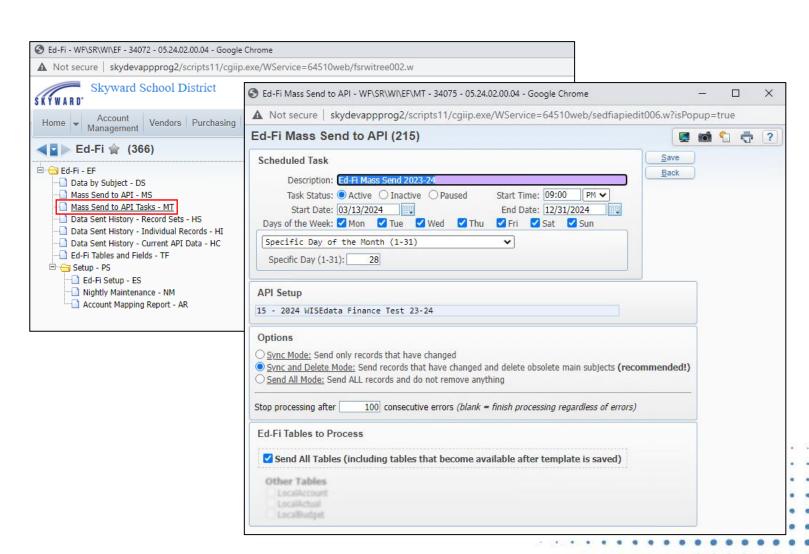


NOTE: You will still need to run the Load Ed-Fi Codes from API utility each fiscal year.



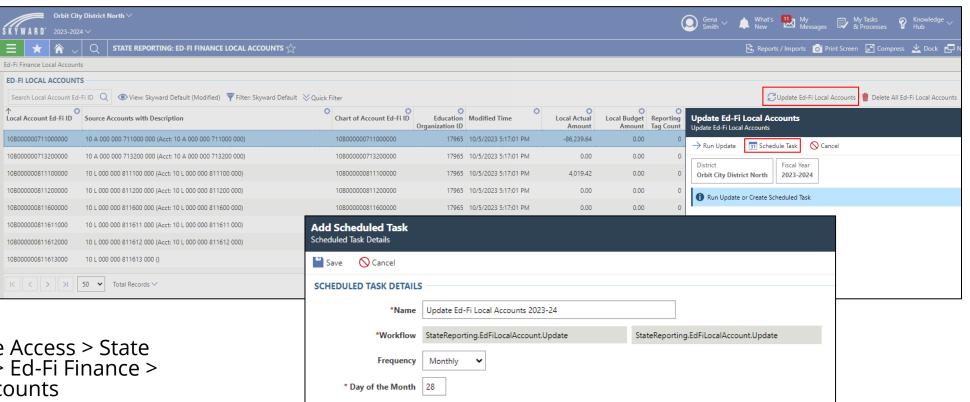
Tip #6: Use Scheduled Tasks to send data for you.

- Web Financial Management >
 Federal/State Reporting > Wisconsin
 State Reporting > Ed-Fi > Ed-Fi > Mass
 Send to API Tasks
 - Mass Send to API Tasks sends Ed-Fi data to DPI automatically at specific intervals.
 - Data needs to be sent to DPI at least once a month after your district's bank reconciliations have been completed for the month.





Tip #6: Use Scheduled Tasks to send data for you.



03/13/2024 Wednesday

12/31/2024 Tuesday

31

(1)

Run on Live Database Only

Repeats during the day

*Start Date

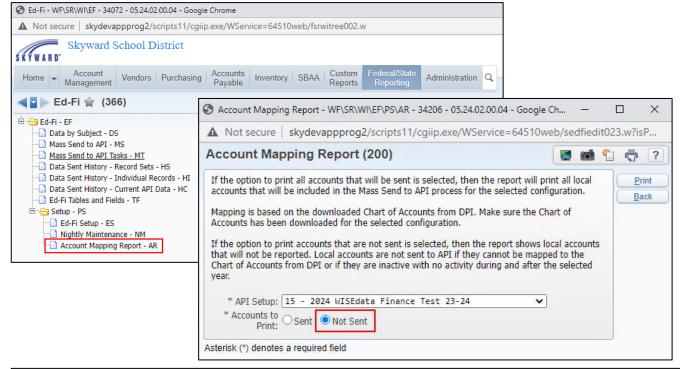
*End Date

*Start Time 09:00 PM

- Menu > Administrative Access > State Reporting > Features > Ed-Fi Finance > Update Ed-Fi Local Accounts
 - The Schedule Task found within the Update Ed-Fi Local Accounts process allows you to set up a schedule task to send Ed-Fi data to DPI automatically at specific intervals.
 - Data needs to be sent to DPI at least once a month after your district's bank reconciliations have been completed for the month.



Tip #7: Use pre-built reports within Skyward to identify accounts that are not in a proper WUFAR format.

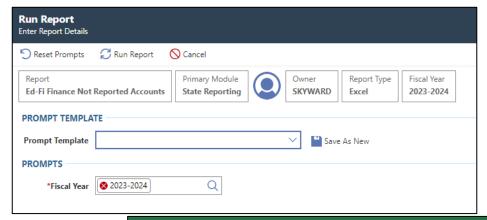


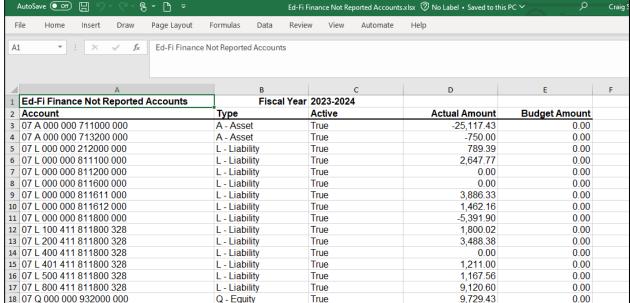
1edfirprt008.p 01-4 03/13/24 SCRAMBLED DATABASE Page:1 05.24.02.00.00 2023-2024 Local Accounts Not Sent to DPI 1:50 PM Local Account Active 2023-2024 Budget 2023-2024 Activity 01 A 000 000 711110 000 Yes 01 A 100 100 100000 100 Yes 01 A 100 222 100000 100 01 A 100 229 100000 100 Yes 01 L 000 000 000070 000 Yes 01 L 000 000 811100 000 Yes

- Web Financial Management >
 Federal/State Reporting > Wisconsin
 State Reporting > Ed-Fi > Setup >
 Account Mapping Report
 - If you select "Not Sent" as the Accounts to Print, this report will show all accounts that will not send as part of the Ed-Fi Finance process for the API (Ed-Fi) Setup you select.
 - The most common reason why accounts will not send is because they are not in a proper WUFAR format.
 - NOTE: You must download the Chart of Accounts from the state for the Ed-Fi Setup you select BEFORE running the Account Mapping Report.



Tip #7: Use pre-built reports within Skyward to identify accounts that are not in a proper WUFAR format.



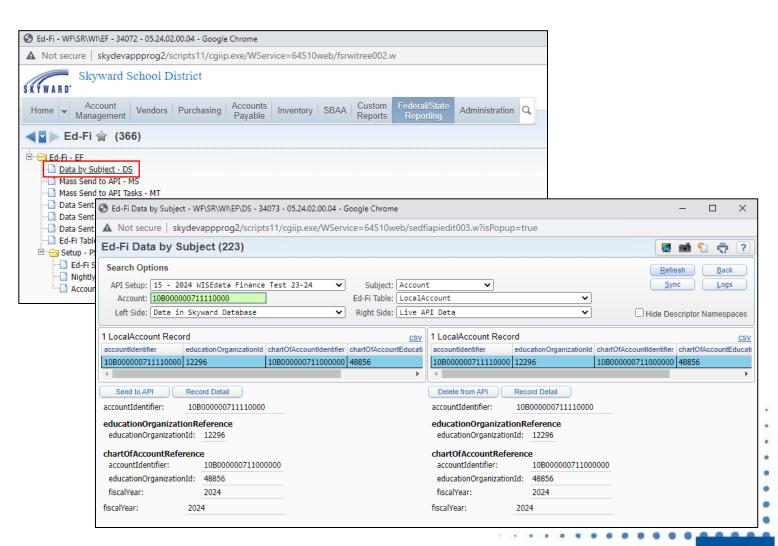


- Menu > Administrative Access > State Reporting > Reports > Ed-Fi Finance Not Reported Accounts
 - This report will show all accounts that will not send as part of the Ed-Fi Finance process for the fiscal year you select.
 - The most common reason why accounts will not send is because they are not in a proper WUFAR format.
 - NOTE: You must run the Load Ed-Fi Codes from API utility for the fiscal year you select BEFORE running the Account Mapping Report. In order to run the Load Ed-Fi Codes from API utility, you must have an Ed-Fi Application created for the fiscal year.



Tip #8: Data by Subject can help troubleshoot issues with specific accounts.

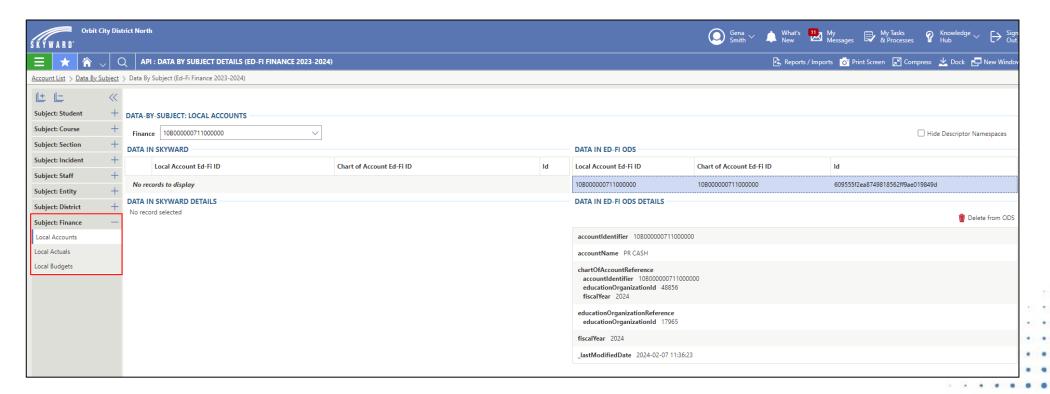
- Web Financial Management >
 Federal/State Reporting > Wisconsin
 State Reporting > Ed-Fi > Ed-Fi > Data
 by Subject
 - Data by Subject allows you to search individual accounts and review what data shows in your database versus what data shows in DPI's API.
 - When typing in account strings, replace A (Asset), L (Liability), and Q (Equity) with B (Balance Sheet) in the account string.





Tip #8: Data by Subject can help troubleshoot issues with specific accounts.

- Menu > Administrative Access > API > Features > Data By Subject
 - Data by Subject allows you to search individual accounts and review what data shows in your database versus what data shows in DPI's API.
 - When searching for accounts, A (Asset), L (Liability), and Q (Equity) will be replaced with B (Balance Sheet) in the account string.





THANK YOU FOR ATTENDING Questions?

