



Skyward Tips & Tricks

WISEdata Finance (Qmlativ & SMS)

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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.

The screenshot shows the '2023-24 Ed-Fi Setups (225)' page in a web browser. The top table lists the setup details:

Order	ID	Name	Profile	URL
1	15	WISEdata Finance Test 23-24	Wisconsin State Reporting - Finance	https://uaapps.dpi.wi.gov/EdFiWebApiV6/data/v3

The detailed view for the selected setup shows the following configuration sections:

- Ed-Fi Tables to Send:** 3 Ed-Fi Tables (LocalAccount, LocalActual, LocalBudget)
- Ed-Fi Schools:** This Ed-Fi Profile does not use Ed-Fi Schools
- Descriptor and Code Setup:**
 - Non-Descriptor Codes:**

Ed-Fi Table	Download All	Browse All
School	Download	Browse
 - Descriptors with No Crosswalk:**

Descriptor	Codes	Download All Descriptors
AccountTypeDescriptor	3	Download
AddressTypeDescriptor	3	Download
CharterStatusDescriptor	0	Download
CountryDescriptor	249	Download
EducationOrganizationCategoryDescriptor	0	Download

SMS

- 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.

Ed-Fi Application

ED-FI APPLICATIONS

Search Numeric Year View: Skyward Default Filter: Skyward Default Quick Filter

Name	Numeric Year	Reporting Type	District Type	Enabled	Retain Message Queue Records For
Ed-Fi Finance 2023-2024	2024	State Reporting	Send as Public District	<input checked="" type="checkbox"/>	90 Days
Ed-Fi Finance 2022-2023	2023	State Reporting	Send as Public District	<input checked="" type="checkbox"/>	90 Days
Ed-Fi Finance 2021-2022	2022	State Reporting	Send as Public District	<input checked="" type="checkbox"/>	90 Days
Ed-Fi Setup 2020-2021	2021	State Reporting	Send as Public District	<input checked="" type="checkbox"/>	90 Days

QMLATIV

- 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.

SMS

- 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.

The top screenshot shows a table of Ed-Fi Setups with the following data:

Order	ID	Name	Profile	URL
1	15	WISEdata Finance Test 23-24	Wisconsin State Reporting - Finance	https://uaapps.dpi.wi.gov/EdFiWebApiV6/data/v3

The bottom screenshot shows the 'Get Data from Ed-Fi Database' tool with the following configuration:

Ed-Fi Table: Limit: Pages:

Param 1: =

Param 2: =

Param 3: =

Param 4: =

The Result section shows the following command line and response:

```
Command Line: \\10.64.83.37\d\skyward\v11.7\05.24.02-release\run\ocx\curl.exe https://uaapps.dpi.wi.gov/EdFiWebApiV6/oauth/token -H "Expect:" --data-binary "@C:\v117dir\stg_niz1kWsJikjJdhZ\cf0b586e-e4e4-93b2-bf14-4617b84ae6d113.snd" --user "Public Finance - Wausau School Test:85765fa8-93cd-4d7a-acae-15f6d1b6c2cb" -s -i -v -X POST -H "Content-Type: application/json" --stderr "C:\v117dir\stg_niz1kWsJikjJdhZ\cf0b586e-e4e4-93b2-bf14-4617305ce9d188.err" -o "C:\v117dir\stg_niz1kWsJikjJdhZ\cf0b586e-e4e4-93b2-bf14-4617305ce9d188.rec"
```

Response Code: 200

Response Data: {
 "access_token": "1ceb4cb779784af78023ace66d591889",
 "expires_in": 1800,
 "token_type": "bearer"
}

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

QMLATIV

- 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.

Orbit City District North
SKYWARD
API : ED-FI APPLICATION DETAILS

Ed-Fi Application > Ed-Fi Application

Name: Ed-Fi Finance 2023-2024
Numeric Year: 2024
Reporting Type: State Reporting

ED-FI APPLICATION DETAILS

*District: Orbit City District North
*Name: Ed-Fi Finance 2023-2024
*Numeric Year: 2024
Reporting Type: State Reporting
Sandbox Base URL: ✓
*Key: Public Finance - Menasha Joint T
Secret:
Enabled:
Retain Message Queue Records For: 30 Days

LOCAL EDUCATION AGENCY
*Local Education Agency Id: 17965

Orbit City District North
SKYWARD
API : ED-FI APPLICATION DETAILS

Ed-Fi Application > Ed-Fi Application

Name: Ed-Fi Finance 2022-2023
Numeric Year: 2023
Reporting Type: State Reporting

ED-FI APPLICATION DETAILS

*District: Orbit City District North
*Name: Ed-Fi Finance 2022-2023
*Numeric Year: 2023
Reporting Type: State Reporting
Sandbox Base URL: ⚠
Token request failed: { "error": "invalid_client" }
*Key: Public Finance - Menasha Joint Test
Secret:
Enabled:
Retain Message Queue Records For: 90 Days

LOCAL EDUCATION AGENCY
*Local Education Agency Id: 17965

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

The screenshot shows a web browser window with the URL `skydevappprog2/scripts11/cgiip.exe/WService=64510web/sedfiapibrws001.w?isPopup=true`. The page title is "2023-24 Ed-Fi Setups (225)". Below the title, there are "Views" and "Filters" dropdowns. A table lists various descriptors with columns for "Order", "ID", "Name", "Profile", "Download", and "Browse". Below the table is a "Profile-Specific Setup" panel with several expandable sections. The "Chart of Accounts" section is expanded, and the "Download Chart of Accounts" link is highlighted with a red box. Other sections include "Reporting Tags Assigned to Projects", "Reporting Tags Assigned to Accounts", "Local Dimensions Mapped to Chart Of Accounts", "Account Locations Mapped to Schools", and "Account Name Overrides".

Order	ID	Name	Profile	Download	Browse
		AddressTypeDescriptor	0	Download	Browse
		CharterStatusDescriptor	0	Download	Browse
		CountryDescriptor	249	Download	Browse
		EducationOrganizationCategoryDescriptor	0	Download	Browse
		EducationOrganizationIdentificationSystemDescriptor	14	Download	Browse
		FinancialCollectionDescriptor	0	Download	Browse
		GradeLevelDescriptor	16	Download	Browse
		InstitutionTelephoneNumberTypeDescriptor	1	Download	Browse
		ReportingTagDescriptor	11	Download	Browse
		SchoolCategoryDescriptor	5	Download	Browse
		SchoolTypeDescriptor	7	Download	Browse
		StateAbbreviationDescriptor	65	Download	Browse

Profile-Specific Setup

- ▶ Chart of Accounts **Download Chart of Accounts** Browse Downloaded Codes
- ▶ Reporting Tags Assigned to Projects Add Load State Defaults
- ▶ Reporting Tags Assigned to Accounts Add
- ▶ Local Dimensions Mapped to Chart Of Accounts Add Account Map Add Object Map Add Function Map Add Project Map
- ▶ Account Locations Mapped to Schools Add Account Location Map
- ▶ Account Name Overrides Add

20 records displayed

SMS

- 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.

The screenshot shows the Skyward administrative interface for Orbit City District North. The top navigation bar includes 'Activity Access', 'Administrative Access', 'Applicant Access', 'Data Migration Manager', 'Employee Access', 'Family Access', 'New Student Enrollment', 'SMS to Qmlativ Tools', and 'Student Access'. The left sidebar lists various modules, with 'State Reporting' highlighted. The main content area is divided into 'FEATURES', 'CODES', 'SETTINGS', and 'UTILITIES'. The 'UTILITIES' section contains the 'Load Ed-Fi Codes from API' link, which is highlighted with a red box. Below this, a modal window titled 'Load Ed-Fi Codes from API' is displayed, showing a 'Run Process' button and a 'Cancel' button. The modal also contains a form with three fields: 'District' (Orbit City District North), 'School Year' (2023-2024), and 'Fiscal Year' (2023-2024), all of which are highlighted with red boxes.

QMLATIV

- 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 re-run 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.

SMS

- 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.

2023-24 Ed-Fi Setups - WF\SR\WI\EF\PS\ES - 34081 - 05.24.02.00.04 - Google Chrome

Not secure | skydevappprog2/scripts11/cgiip.exe/WService=64510web/sedfiapibrws001.w?isPopup=true

2023-24 Ed-Fi Setups (225)

Views: General Filters: *Skyward Default

Order	ID	Name	Profile	URL
		EducationOrganizationIdentificationSystemDescriptor	14	Download Browse
		FinancialCollectionDescriptor	0	Download Browse
		GradeLevelDescriptor	16	Download Browse
		InstitutionTelephoneNumberTypeDescriptor	1	Download Browse
		ReportingTagDescriptor	11	Download Browse
		SchoolCategoryDescriptor	5	Download Browse
		SchoolTypeDescriptor	7	Download Browse
		StateAbbreviationDescriptor	65	Download Browse

▼ Profile-Specific Setup

- ▶ Chart of Accounts Download Chart of Accounts Browse Downloaded Codes
- ▶ Reporting Tags Assigned to Projects Add Load State Defaults
- ▶ Reporting Tags Assigned to Accounts Add
- ▼ Local Dimensions Mapped to Chart Of Accounts Add Account Map Add Object Map Add Function Map Add Project Map
 - Edit Delete Dimension Type Local Map To
 - Function 120000 120100
- ▶ Account Locations Mapped to Schools Add Account Location Map
- ▶ Account Name Overrides Add

20 1 records displayed Order:

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

QMLATIV

- 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.

Orbit City District North
2023-2024
ACCOUNT STRUCTURE : DIMENSION GROUP LIST

Dimension Group List

DIMENSION GROUPS

Display Order	Dimension Group Code	Dimension Group Description	Dimension Description Required
1	Fund	Fund	<input type="checkbox"/>
2	Location	Location	<input type="checkbox"/>
3	Object	Object	<input type="checkbox"/>
4	Source	Source	<input type="checkbox"/>
5	Function	Function	<input type="checkbox"/>
6	Project	Project	<input type="checkbox"/>

DIMENSIONS

Dimension Code	Dimension Description	Active	Ed-Fi Dimension Code Override
07	Fixed Assets	<input checked="" type="checkbox"/>	
10	General	<input checked="" type="checkbox"/>	
11	Grants	<input checked="" type="checkbox"/>	
24	Special Education	<input checked="" type="checkbox"/>	
30	Debt Services	<input checked="" type="checkbox"/>	
40	Capital Project	<input checked="" type="checkbox"/>	

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

The top screenshot shows a table with the following data:

Order	ID	Name	Profile	URL
1	15	WISEdata Finance Test 23-24	Wisconsin State Reporting - Finance	https://uaapps.dpi.wi.gov/EdFiWebApV6/data/v3

The bottom screenshot shows the 'Profile-Specific Setup' section with the following options:

- Chart of Accounts
- Reporting Tags Assigned to Projects
- Reporting Tags Assigned to Accounts
- Local Dimensions Mapped to Chart Of Accounts
- Account Locations Mapped to Schools
- Account Name Overrides

SMS

- 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.

Orbit City District North

SKYWARD

API : ED-FI APPLICATION CLONE RUN HISTORY

Activity Access | Administrative Access | Applicant Access | Data Migration Manager | Employee Access | Family Access | New Student Enrollment | SMS to Qmlativ Tools | Student Access

Account | Accounts Payable | Accounts Receivable | Activity | API | Applicant Tracking | Asset | Attendance | Benefit Management

FEATURES

- Account List
- Account Monthly Activity
- Account Profile
- Accounting Update
- Accounting Update Detail
- Bank Reconciliation
- Cash Receipt Deposit
- Fiscal Month
- Grant By Account
- Grant By Source
- Import Journal Entries

CODES

- Account Cross Reference
- Account Group
- Account Group Template
- Bank Account
- Cash Receipt Group
- Category 1
- Category 2
- Category 3
- Category 4
- Currency

SETTINGS

- District Configuration
- System Configuration

UTILITIES

- Account Activity Audit
- Account Budget Version Audit
- Account Calendar Year Audit
- Account Import
- Account Merge
- Account Setup Audit
- Beginning Balance Audit
- Budget Amendment Audit
- Clone Ed-Fi Dimensions**
- Encumbrance Audit

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.

Orbit City District North

SKYWARD

API : ED-FI APPLICATION CLONE RUN HISTORY

Ed-Fi Application Clone Run History

MM/DD/YYYY | View: Skyward Default | Filter: Skyward Default | Quick Filter

Clone Ed-Fi Applications | Clone Descriptor Crosswalks

Clone Type	Date/Time Run Started	Date/Time Run Ended	Run By	Type	Status	File Name	Canceled By
Ed-Fi Application	03/13/2024 11:23 AM	03/13/2024 11:23 AM	Smith, Gena	Clone	Complete		
Ed-Fi Application	10/06/2023 11:05 AM	10/06/2023 11:05 AM	Smith, Gena	Clone	Complete		
Ed-Fi Application	10/05/2023 02:30 PM	10/05/2023 02:30 PM	Smith, Gena	Clone	Complete		
Ed-Fi Application	10/05/2023 02:29 PM	10/05/2023 02:29 PM	Smith, Gena	Clone	Complete		

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.

SMS

- 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.

The screenshot displays two browser windows from the Skyward School District system. The left window shows the navigation menu with 'Ed-Fi' selected, and 'Mass Send to API Tasks - MT' highlighted in a red box. The right window shows the configuration page for 'Ed-Fi Mass Send to API (215)'. The 'Scheduled Task' section includes a description 'Ed-Fi Mass Send 2023-24', task status 'Active', start time '09:00 PM', start date '03/13/2024', end date '12/31/2024', and days of the week 'Mon, Tue, Wed, Thu, Fri, Sat, Sun'. The 'API Setup' section shows '15 - 2024 WISEdata Finance Test 23-24'. The 'Options' section has 'Sync and Delete Mode' selected. The 'Ed-Fi Tables to Process' section has 'Send All Tables (including tables that become available after template is saved)' checked. The 'Other Tables' section includes 'LocalAccount', 'LocalActual', and 'LocalBudget'.

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

Orbit City District North

SKYWARD 2023-2024

STATE REPORTING: ED-FI FINANCE LOCAL ACCOUNTS

Ed-Fi Finance Local Accounts

ED-FI LOCAL ACCOUNTS

Search Local Account Ed-Fi ID View: Skyward Default (Modified) Filter: Skyward Default Quick Filter

Local Account Ed-Fi ID	Source Accounts with Description	Chart of Account Ed-Fi ID	Education Organization ID	Modified Time	Local Actual Amount	Local Budget Amount	Reporting Tag Count
10B000000711000000	10 A 000 000 711000 000 (Acct: 10 A 000 000 711000 000)	10B000000711000000	17965	10/5/2023 5:17:01 PM	-86,239.64	0.00	0
10B000000713200000	10 A 000 000 713200 000 (Acct: 10 A 000 000 713200 000)	10B000000713200000	17965	10/5/2023 5:17:01 PM	0.00	0.00	0
10B000000811100000	10 L 000 000 811100 000 (Acct: 10 L 000 000 811100 000)	10B000000811100000	17965	10/5/2023 5:17:01 PM	4,019.42	0.00	0
10B000000811200000	10 L 000 000 811200 000 (Acct: 10 L 000 000 811200 000)	10B000000811200000	17965	10/5/2023 5:17:01 PM	0.00	0.00	0
10B000000811600000	10 L 000 000 811600 000 (Acct: 10 L 000 000 811600 000)	10B000000811600000	17965	10/5/2023 5:17:01 PM	0.00	0.00	0
10B000000811611000	10 L 000 000 811611 000 (Acct: 10 L 000 000 811611 000)						
10B000000811612000	10 L 000 000 811612 000 (Acct: 10 L 000 000 811612 000)						
10B000000811613000	10 L 000 000 811613 000 ()						

Update Ed-Fi Local Accounts

Update Ed-Fi Local Accounts

Run Update Schedule Task Cancel

District: Orbit City District North Fiscal Year: 2023-2024

Run Update or Create Scheduled Task

Add Scheduled Task

Scheduled Task Details

Save Cancel

SCHEDULED TASK DETAILS

*Name: Update Ed-Fi Local Accounts 2023-24

*Workflow: StateReporting.EdFiLocalAccount.Update

Frequency: Monthly

* Day of the Month: 28

Run on Live Database Only:

*Start Date: 03/13/2024 Wednesday

*End Date: 12/31/2024 Tuesday

*Start Time: 09:00 PM

Repeats during the day:

QMLATIV

- 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.

The screenshot shows the Skyward School District interface. In the left sidebar, the 'Account Mapping Report - AR' is highlighted. The main window displays the 'Account Mapping Report (200)' setup screen. The 'Accounts to Print' section has the 'Not Sent' radio button selected. The 'API Setup' dropdown is set to '15 - 2024 WISEdata Finance Test 23-24'. A note at the bottom states: 'Asterisk (*) denotes a required field'.

SMS

- 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.

ledfirprt008.p 01-4
05.24.02.00.00

SCRAMBLED DATABASE 03/13/24 Page:1
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	Yes		
01 A 100 229 100000 100	Yes		
01 L 000 000 000070 000	Yes		
01 L 000 000 811100 000	Yes		

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

Run Report
Enter Report Details

Report: Ed-Fi Finance Not Reported Accounts
 Primary Module: State Reporting
 Owner: SKYWARD
 Report Type: Excel
 Fiscal Year: 2023-2024

PROMPT TEMPLATE

Prompt Template: Save As New

PROMPTS

*Fiscal Year:

Ed-Fi Finance Not Reported Accounts.xlsx

Account	Type	Fiscal Year	Active	Actual Amount	Budget Amount
07 A 000 000 711000 000	A - Asset	2023-2024	True	-25,117.43	0.00
07 A 000 000 713200 000	A - Asset	2023-2024	True	-750.00	0.00
07 L 000 000 212000 000	L - Liability	2023-2024	True	789.39	0.00
07 L 000 000 811100 000	L - Liability	2023-2024	True	2,647.77	0.00
07 L 000 000 811200 000	L - Liability	2023-2024	True	0.00	0.00
07 L 000 000 811600 000	L - Liability	2023-2024	True	0.00	0.00
07 L 000 000 811611 000	L - Liability	2023-2024	True	3,886.33	0.00
07 L 000 000 811612 000	L - Liability	2023-2024	True	1,462.16	0.00
07 L 000 000 811800 000	L - Liability	2023-2024	True	-5,391.90	0.00
07 L 100 411 811800 328	L - Liability	2023-2024	True	1,800.02	0.00
07 L 200 411 811800 328	L - Liability	2023-2024	True	3,488.38	0.00
07 L 400 411 811800 328	L - Liability	2023-2024	True	0.00	0.00
07 L 401 411 811800 328	L - Liability	2023-2024	True	1,211.00	0.00
07 L 500 411 811800 328	L - Liability	2023-2024	True	1,167.56	0.00
07 L 800 411 811800 328	L - Liability	2023-2024	True	9,120.60	0.00
07 Q 000 000 932000 000	Q - Equity	2023-2024	True	9,729.43	0.00

QMLATIV

- 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.

SMS

- 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.

The screenshot displays the Skyward School District software interface. The top window shows the navigation menu with 'Data by Subject - DS' highlighted. The bottom window shows the 'Ed-Fi Data by Subject (223)' search interface. The search options are:

- API Setup: 15 - 2024 WISEdata Finance Test 23-24
- Subject: Account
- Account: 10B000000711110000
- Ed-Fi Table: LocalAccount
- Left Side: Data in Skyward Database
- Right Side: Live API Data

The table below shows the search results for the account 10B000000711110000:

accountIdentifier	educationOrganizationId	chartOfAccountIdentifier	chartOfAccountEducati
10B000000711110000	12296	10B000000711000000	48856

The details for the account 10B000000711110000 are:

accountIdentifier: 10B000000711110000

educationOrganizationReference
educationOrganizationId: 12296

chartOfAccountReference
accountIdentifier: 10B000000711000000
educationOrganizationId: 48856
fiscalYear: 2024

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

QMLATIV

- 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.

The screenshot displays the Skyward QMLATIV interface. The top navigation bar includes the Skyward logo, user profile (Gena Smith), and various utility icons. The main content area is titled 'API : DATA BY SUBJECT DETAILS (ED-FI FINANCE 2023-2024)'. A sidebar on the left lists subject categories: Student, Course, Section, Incident, Staff, Entity, District, and Finance. The 'Finance' category is selected and expanded, showing sub-items: Local Accounts, Local Actuals, and Local Budgets. The main panel shows 'DATA-BY-SUBJECT: LOCAL ACCOUNTS' with a search filter for 'Finance' set to '10800000711000000'. Below this, there are sections for 'DATA IN SKYWARD' (showing 'No records to display') and 'DATA IN ED-FI ODS' (showing one record). The 'DATA IN ED-FI ODS' table has columns for 'Local Account Ed-Fi ID', 'Chart of Account Ed-Fi ID', and 'Id'. The record shown is: Local Account Ed-Fi ID: 10800000711000000, Chart of Account Ed-Fi ID: 10800000711000000, Id: 609555f2ea8749818562ff9ae019849d. Below the table is a 'DATA IN ED-FI ODS DETAILS' section with a 'Delete from ODS' button. The details include: accountIdentifier: 10800000711000000, accountName: PR CASH, chartOfAccountReference: accountIdentifier: 10800000711000000, educationOrganizationId: 48856, fiscalYear: 2024, educationOrganizationReference: educationOrganizationId: 17965, fiscalYear: 2024, and _lastModifiedDate: 2024-02-07 11:36:23.

THANK YOU FOR ATTENDING
Questions?