



## What is WISEdata Finance?

**WISEdata Finance** is Wisconsin's next-generation financial reporting system for school districts and other local education agencies (LEAs). Through WISEdata Finance, financial data flows directly from financial software systems to DPI, as is currently done for WISEdata student data reporting.

To get started using WISEdata Finance, you'll need to **request access to the application** through WISEhome. Then, users can **add a financial management system subscription** in Ed-Fi Credential.



### ➤ Request Access to WISE Applications in WISEsecure

You need to request access to both Ed-Fi Credential Application and WISEdata Finance.

1. Log into **WISEhome** using your WAMS ID or a district or agency email account.
2. In WISEhome, select **Request Access** at the top of the screen.
3. On the Customer Request Access form, fill out the required fields, including your **District**, which schools within that district you need access for, **Job Title**, and the **Applications** you're requesting access to. You can also include **Comments** to explain why you need access. Once you fill out the form, click **Request Access**.
4. Once you've submitted an access request, you can check the status of your request by going to the **App Request Status** page. Search for pending access requests by **Request Date, Organization / Suborganization, Application, or Role**. You'll be notified by email and on the App Request Status page when your request is approved or denied.

The screenshot shows the 'Customer Request Access' form in WISEhome. The form includes fields for District, School Name, City, Job Title, and Applications. The Applications list includes Classroom Data Tool, CTE Skills, CTE Technical Incentive Grant, Ed-Fi Credential, School Directory, Finance Portal, and IEP Postsecondary Transition Plan (PTP). The Ed-Fi Credential and Finance Portal options are highlighted with red boxes.

For more information about WISEsecure, visit <https://dpi.wi.gov/wise/wiseshome-info#info-for-app-admins>

### ➤ Add a Financial Management System Subscription

The Ed-Fi Credential application generates encryption keys and secrets that are used to establish a secure connection between the vendor system and DPI.

To add a vendor subscription for your financial management system, please follow the below steps:

1. Log into **WISEhome** and open the **Ed-Fi Credential** application.
2. Under **All Schools**, click the **Add** button to add a new vendor subscription.
3. In the **New Subscription** window, fill out the following fields:
  - **Vendor Name:** Select your vendor from the drop-down list.
  - **Resource Access:** For your financial management system vendor, choose 'Write on local account, budget and actuals'.
4. Once you're done, click **Save Changes** at the bottom of the window to add the vendor subscription.
5. Once your vendor is added, back on the main page, you will see them listed along with security credentials (API key and secret). Your security credentials (API key and secret) should be kept private and should not be shared.

The screenshot shows the 'Vendor Subscription' page in Ed-Fi Credential. A table lists vendors with columns for Type, Resource Access, Vendor Name, Credentials, and Year Cut-offs. The 'All Schools' dropdown is highlighted with a red box, and the 'Add' button is highlighted with a red arrow.

The screenshot shows the 'New Subscription' window. The 'Resource Access' dropdown is set to 'Write on local account, budget and actuals', which is highlighted with a red box. Other fields include Vendor Name, Access Level, and Read Only Prior To School Year.

By subscribing, you are agreeing to the following:  
1. District data is required to be collected and then housed at the Department of Public Instruction through the Wisconsin Information System for Education. This agreement will authorize...