The Do's, Don'ts, and Realities of Moving to Qmlativ

February 2026

Presented by : Courtney Makowski

EMPOWERING LEARNERS. BUILDING COMMUNITY. INSPIRING FUTURES.

The Goal vs the Reality

”Lift & Shift”
Migrate with your exact same processes

Streamline
Using this time to change and improve processes

- This conversion is a massive project - don't underestimate it!
- It's not just about “surviving”; it’s about improving

Build Your Foundation

- **Form a Good, Solid Team**
  - Cross-departmental is non-negotiable (HR, Payroll, Finance, Employee, IT)
  - These are your Subject Matter Experts
- **Know your Capacity**
  - Be realistic on your capacity
  - This is a second job – not a side job
  - Plan for temporary backfill or off-loading of daily duties
- **Assign Lead & Decision-Makers**
  - Each area needs a single “Lead’ empowered to make decision
  - Avoid “analysis paralysis”



Garbage in, Garbage out

- Qmlativ will not magically fix broken data; it will only make it more obvious
- Start now -
  - Find and clean up old codes
  - inactivate vendors/employees
  - test data before you migrate



The Challenge: HR & Payroll

- High-stakes area - people with forgive a missing report, they will not forgive a missing paycheck
- Ask all the questions -
  - No question is too small!
    - How are deductions calculated?
    - Where does benefit data live?
    - How do stipends *really* work?
  - Test, Test, and Test Again
  - Test scenarios -
    - don't just run “normal” payrolls
    - Test your exceptions!



The “R” Word

- Your reports are not coming with you - Reports do not migrate from SMS
- You will be building your critical reports from scratch
- This will be a major pain point for your end-users
- Start Planning NOW
  - Prioritize your “mission critical” reports
- Don’t Reinvent the Wheel
  - Use the “File Sharing” in Community

Managing the “Firehose”





- You and your team ***will*** feel overwhelmed - this is normal
- Designate one Point Person to communicate with skyward conversion specialist
- Utilize a shared document to track questions/answers

Use Your Lifelines



- **Lean on other districts**
- **Use skyward resources**
- **Submit tickets**

Oxford Team:

- **Courtney Makowski - Conversion**
  courtney.makowski@oxfordschools.org
- **Meg Nicholson - Payroll**
  meg.nicholson@oxfordschools.org
- **Cissie Patterson - HR**
  cissie.patterson@oxfordschools.org

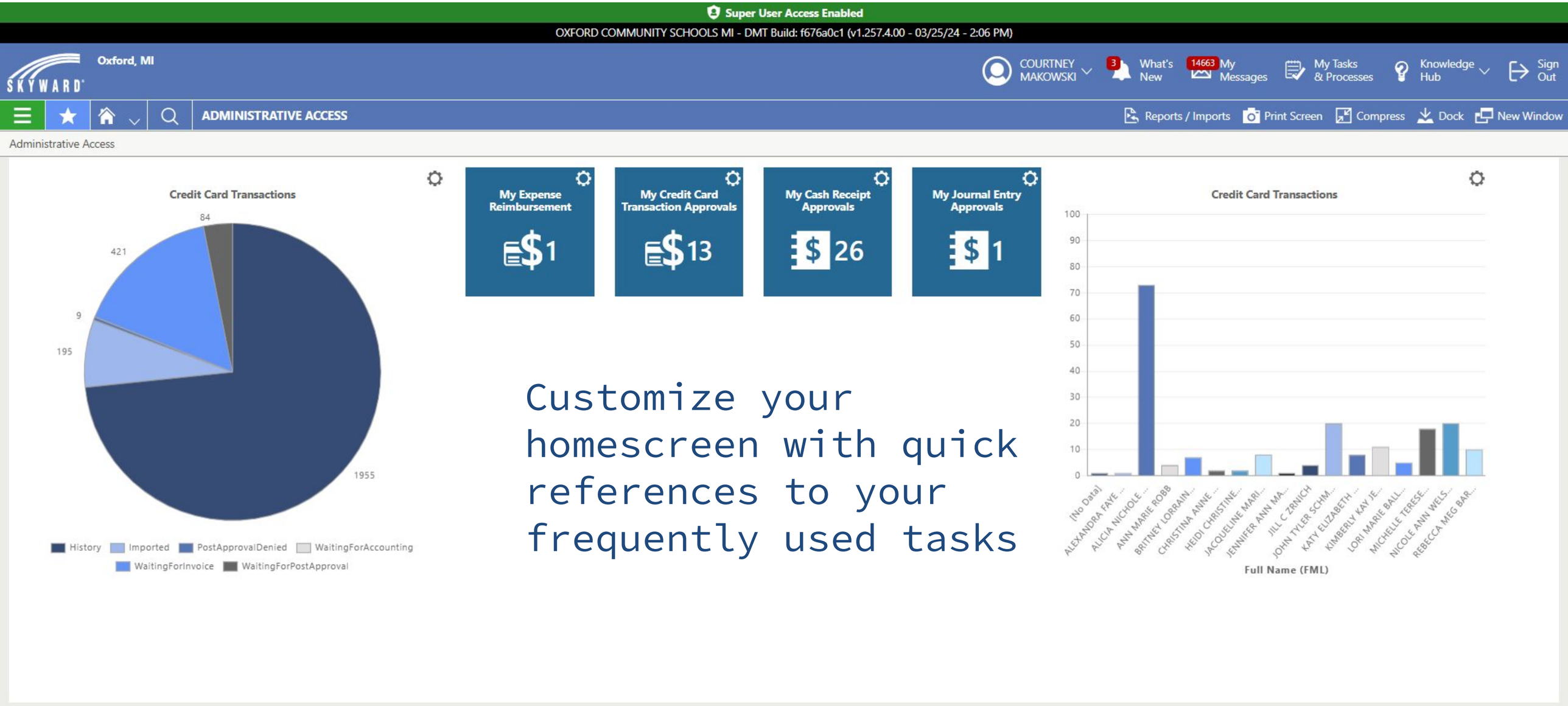
18 Months later...We Thrived!

- The first 6 months were tough
  - All the firsts were scary
    - payroll
    - summer spread
    - audit
- 18 months in, it's the “new normal”
- It’s hard work, but it is worth it



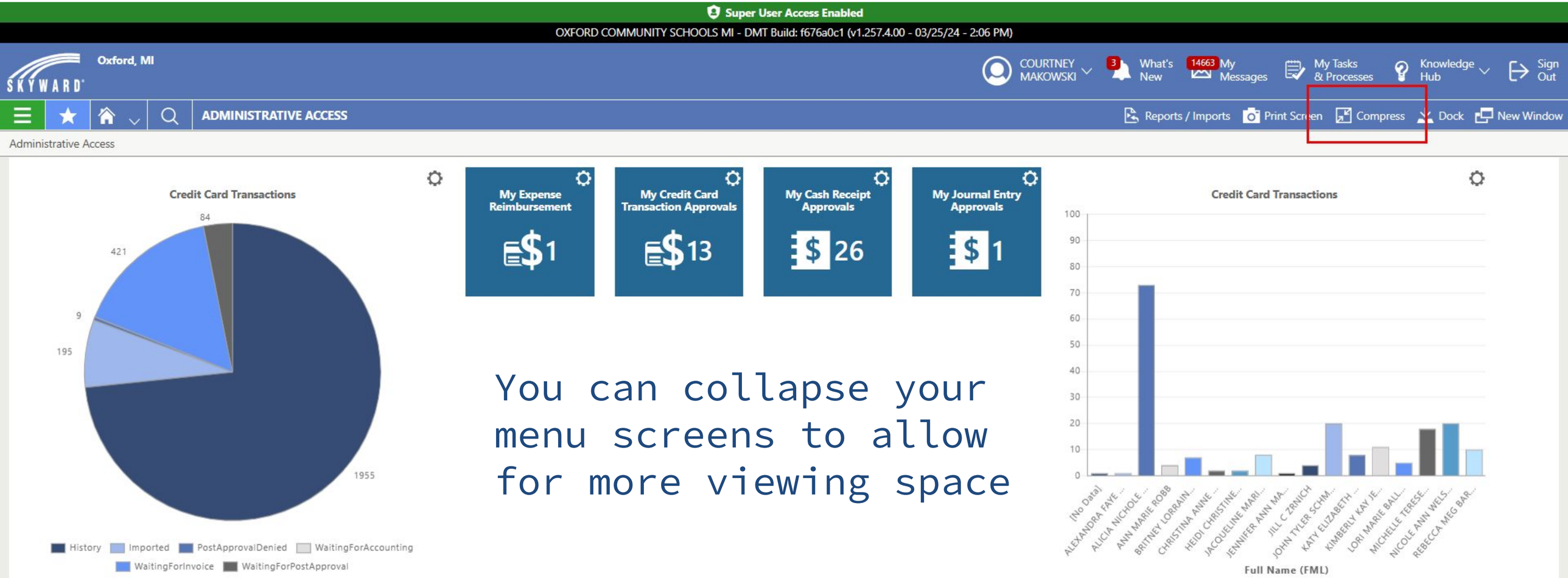


Live Tiles



Customize your homescreen with quick references to your frequently used tasks

Compress / Expand



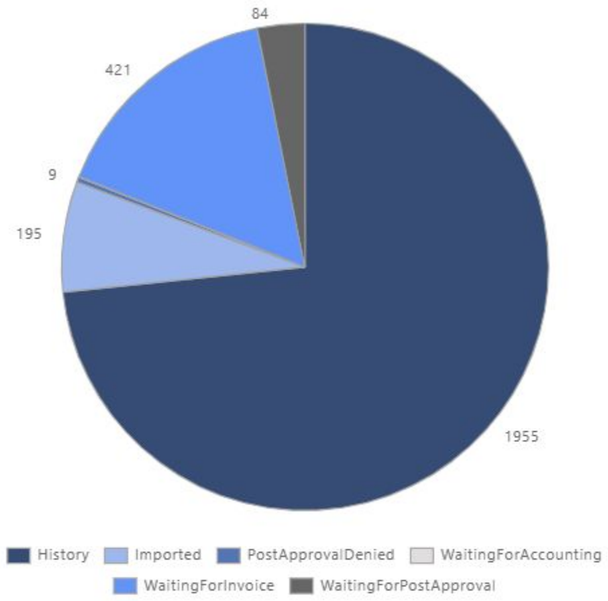
Super User Access Enabled

OXFORD COMMUNITY SCHOOLS MI - DMT Build: f676a0c1 (v1.257.4.00 - 03/25/24 - 2:06 PM)

Oxford, MI

COURTNEY MAKOWSKI

Credit Card Transactions



My Expense Reimbursement

$1

My Credit Card Transaction Approvals

$13

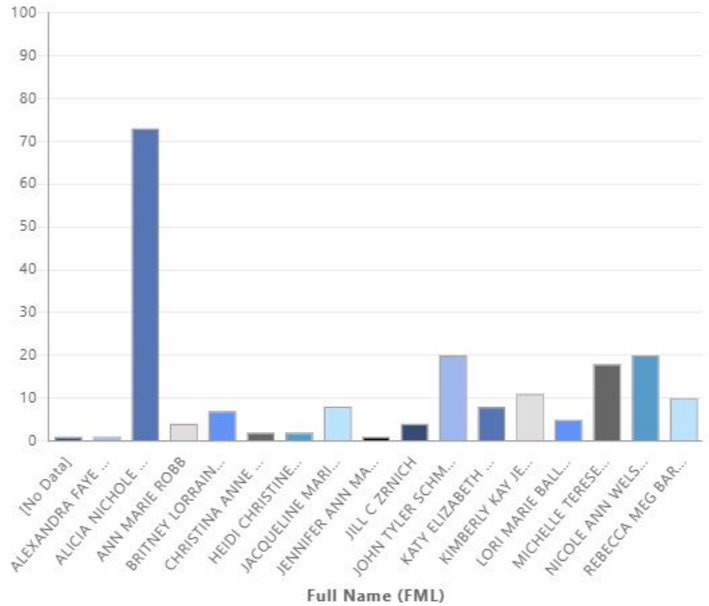
My Cash Receipt Approvals

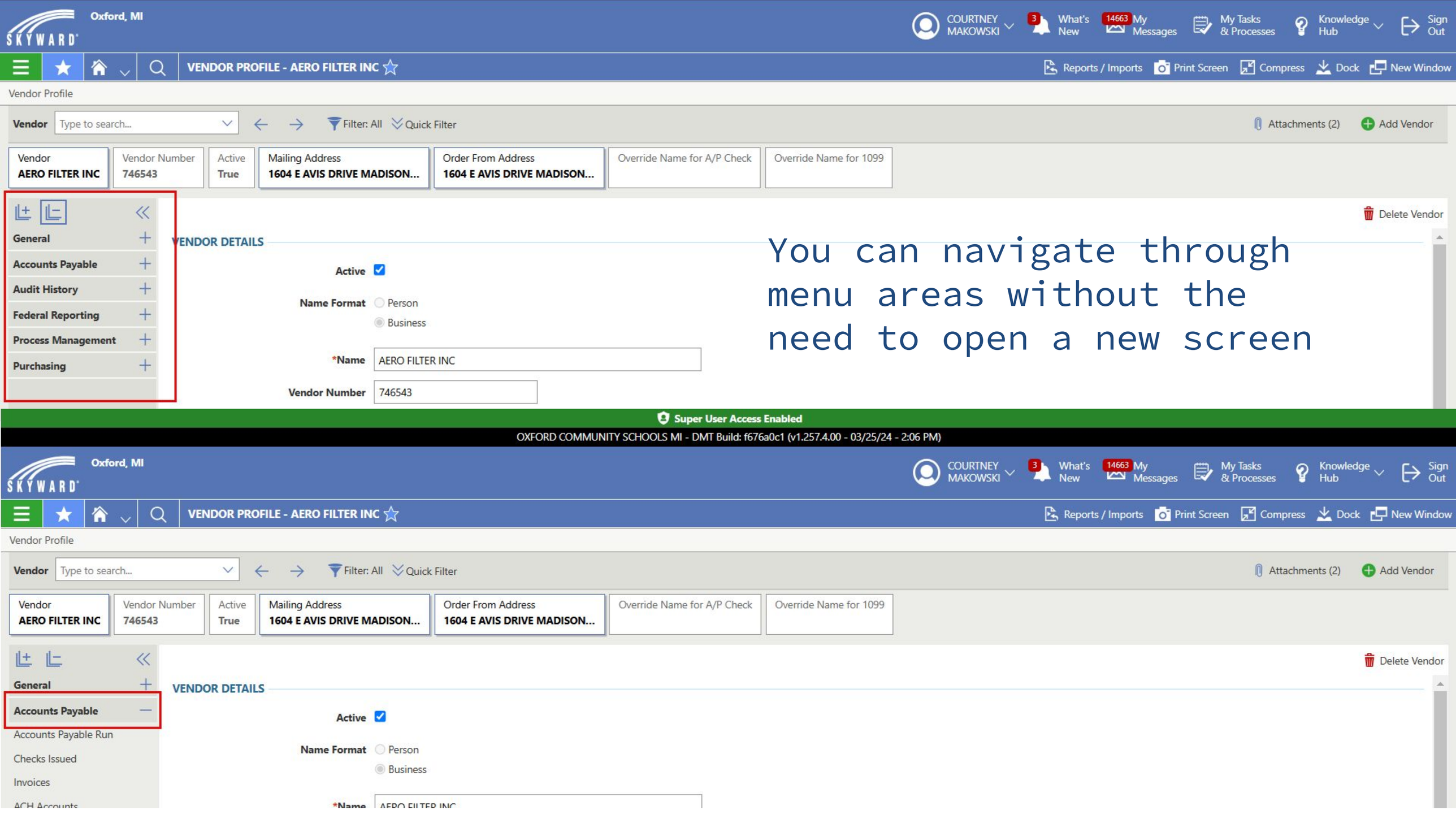
$26

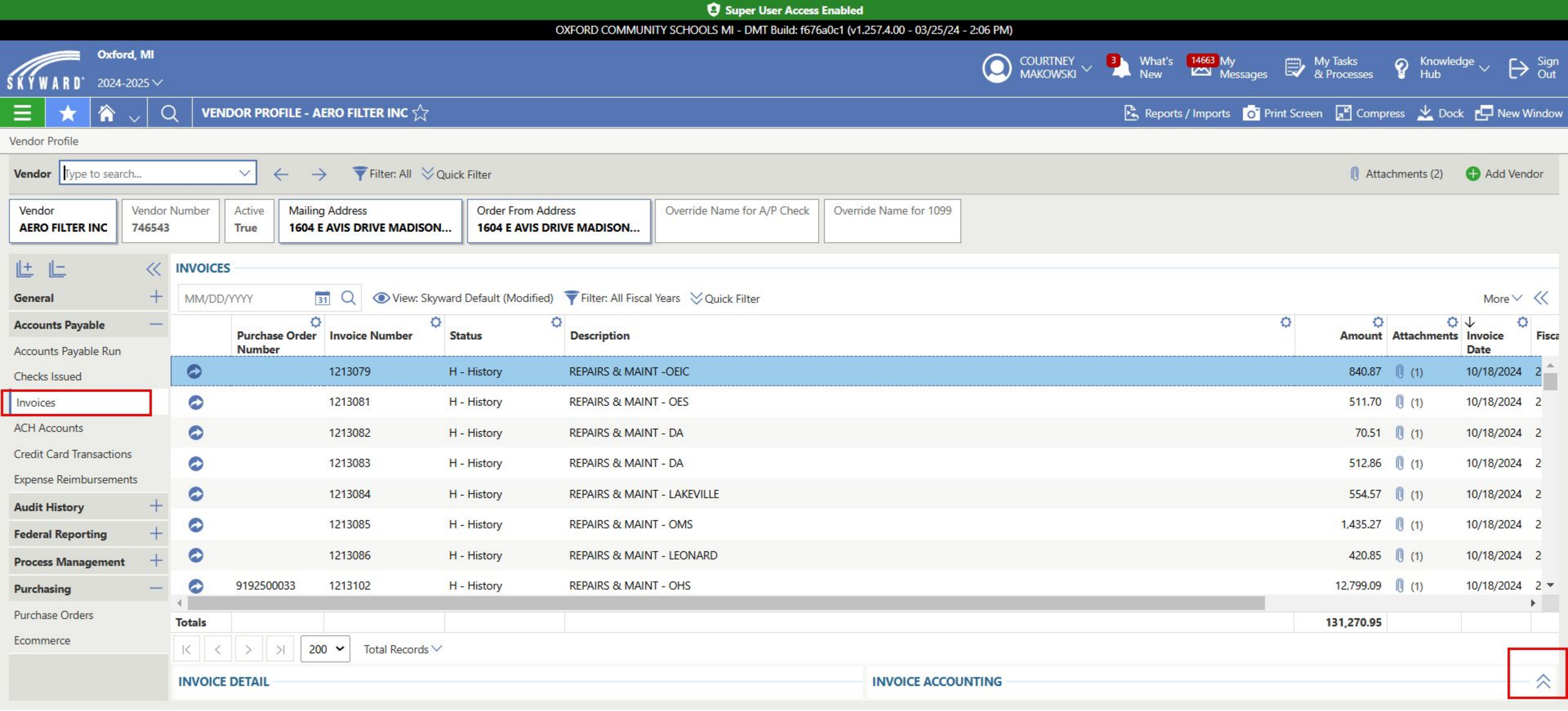
My Journal Entry Approvals

$1

Credit Card Transactions




Oxford, MI
COURTNEY MAKOWSKI
3 What's New
14663 My Messages
My Tasks & Processes
Knowledge Hub
Sign Out
VENDOR PROFILE - AERO FILTER INC
Reports / Imports
Print Screen
Compress
Dock
New Window
Vendor Profile
Vendor
Type to search...
Filter: All
Quick Filter
Attachments (2)
Add Vendor
Vendor AERO FILTER INC
Vendor Number 746543
Active True
Mailing Address 1604 E AVIS DRIVE MADISON...
Order From Address 1604 E AVIS DRIVE MADISON...
Override Name for A/P Check
Override Name for 1099
Delete Vendor
General
Accounts Payable
Audit History
Federal Reporting
Process Management
Purchasing
VENDOR DETAILS
Active
Name Format
Person
Business
*Name
AERO FILTER INC
Vendor Number
746543
You can navigate through menu areas without the need to open a new screen
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Mailing Address 1604 E AVIS DRIVE MADISON...
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Override Name for A/P Check
Override Name for 1099
Delete Vendor
General
Accounts Payable
Accounts Payable Run
Checks Issued
Invoices
ACH Accounts
VENDOR DETAILS
Active
Name Format
Person
Business
*Name
AERO FILTER INC



By clicking the arrow in bottom right corner it will display detail information for the line you have selected

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Oxford, MI

2024-2025

COURTNEY MAKOWSKI | 3 What's New | 14663 My Messages | My Tasks & Processes | Knowledge Hub | Sign Out

VENDOR PROFILE - AERO FILTER INC

Reports / Imports | Print Screen | Compress | Dock | New Window

Vendor Profile

Vendor: Type to search... | Filter: All | Quick Filter | Attachments (2) | Add Vendor

Vendor	Vendor Number	Active	Mailing Address	Order From Address	Override Name for A/P Check	Override Name for 1099
AERO FILTER INC	746543	True	1604 E AVIS DRIVE MADISON...	1604 E AVIS DRIVE MADISON...		

- General
- Accounts Payable
  - Accounts Payable Run
  - Checks Issued
  - Invoices
  - ACH Accounts
  - Credit Card Transactions
  - Expense Reimbursements
- Audit History
- Federal Reporting
- Process Management
- Purchasing
  - Purchase Orders
  - Ecommerce

INVOICES

MM/DD/YYYY | View: Skyward Default (Modified) | Filter: All Fiscal Years | Quick Filter | More

Purchase Order Number	Invoice Number	Status	Description	Amount	Attachments	Invoice Date	Fisca
	1213079	H - History	REPAIRS & MAINT -OEIC	840.87	(1)	10/18/2024	2
	1213081	H - History	REPAIRS & MAINT - OES	511.70	(1)	10/18/2024	2
Totals				131,270.95			

200 | Total Records

INVOICE DETAIL

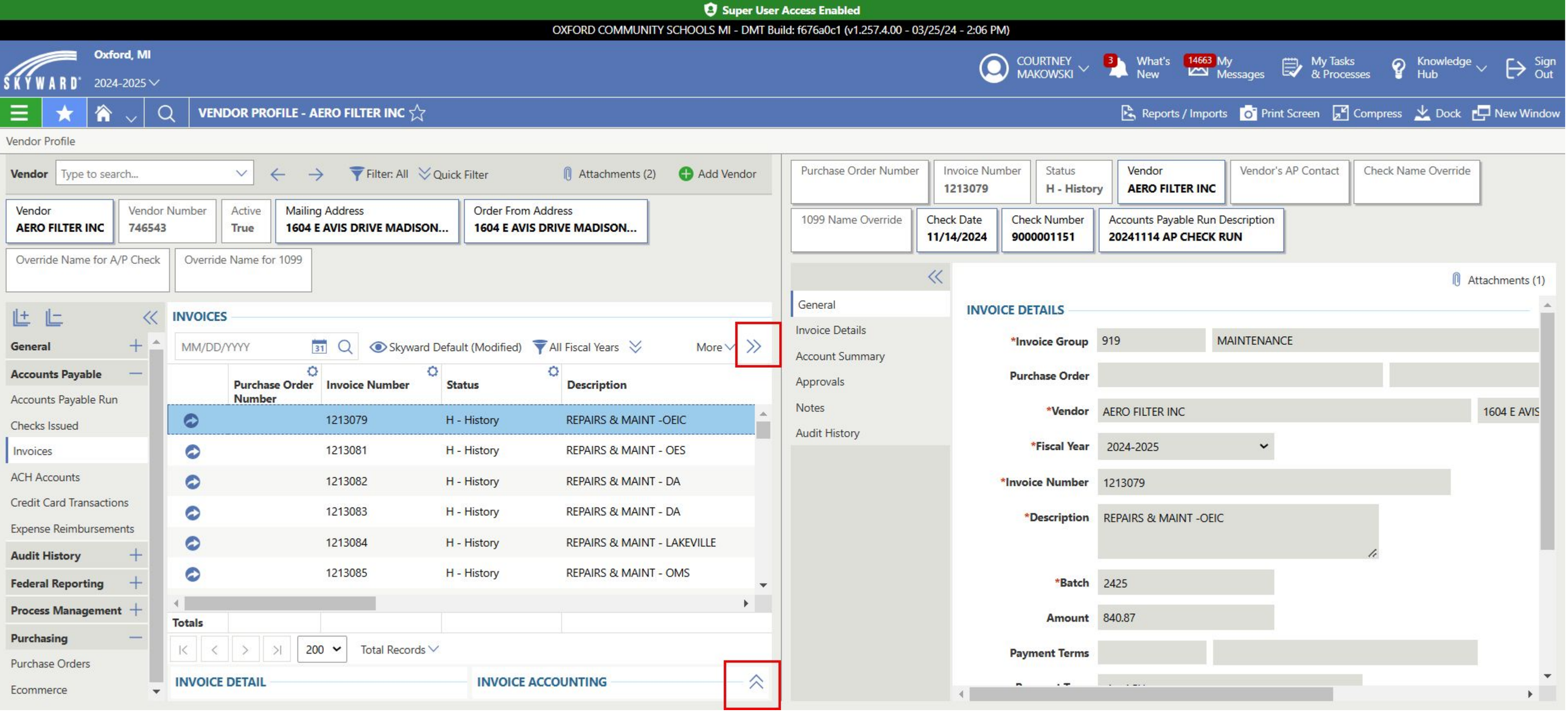
Search Display Order | View: Skyward Default | Filter: Skyward Default | More

Display Order	Catalog Item	Quantity	Unit Cost	Amount	Description	On Purchase Order
1		1.00000	840.87000	840.87	REPAIRS & MAINT - OEIC	

INVOICE ACCOUNTING

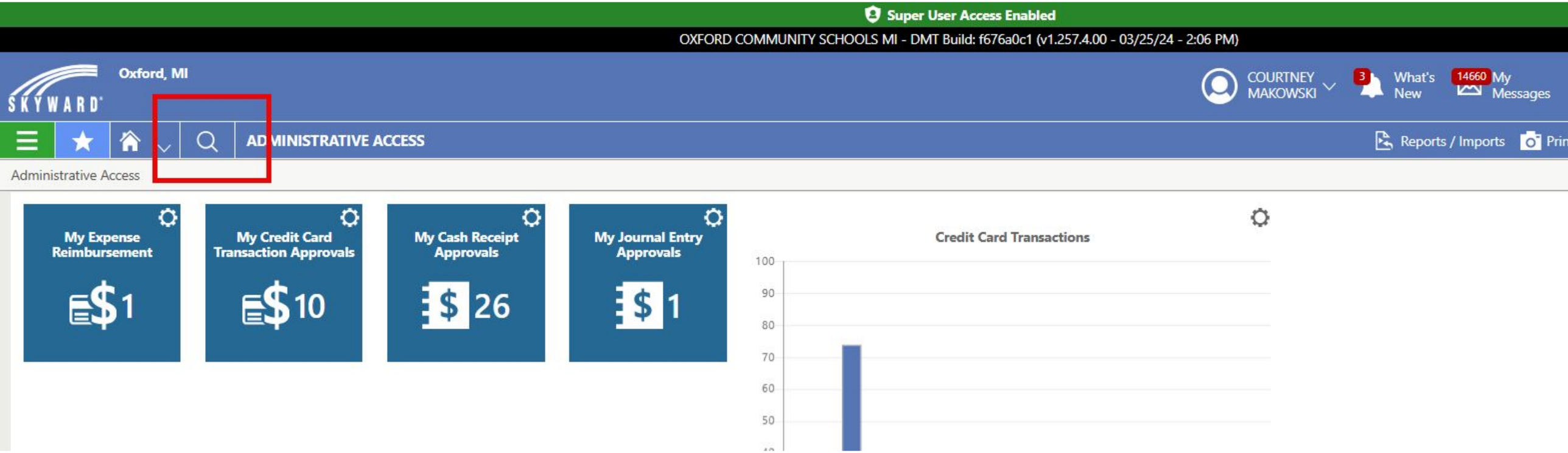
Search Account | View: Skyward Default | Filter: Skyward Default | More

Account	Amount
11 E 261 4110 63110 000 0000 0775	840.87

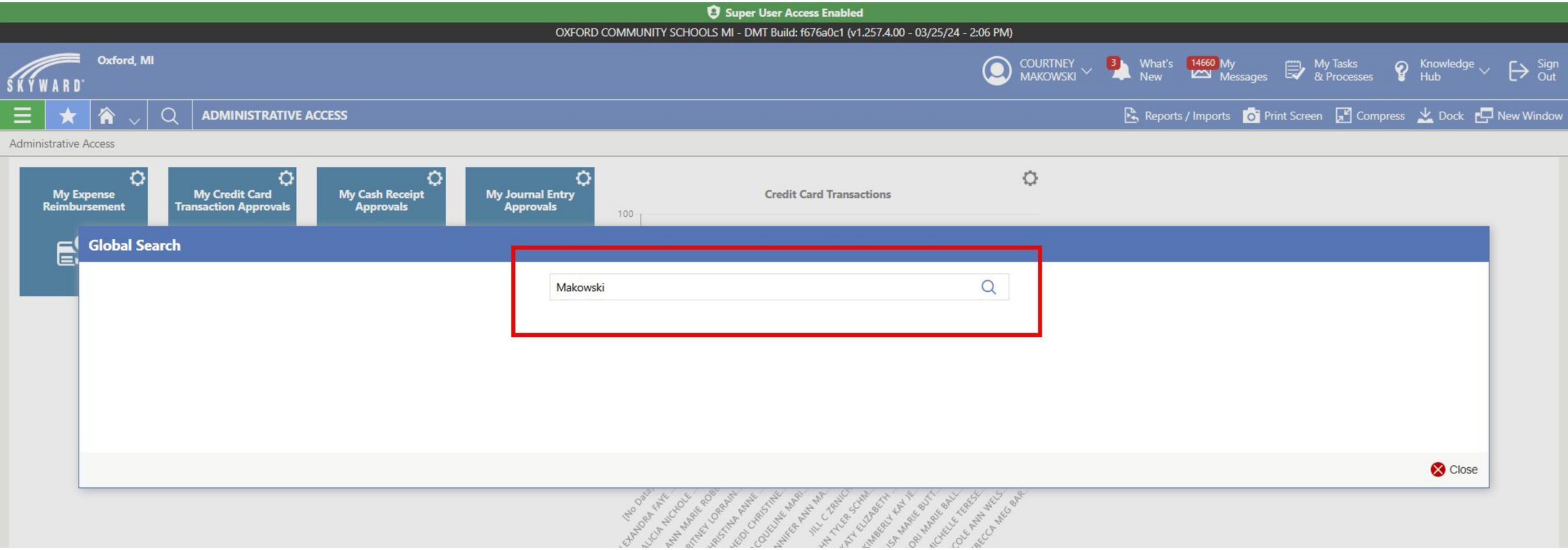


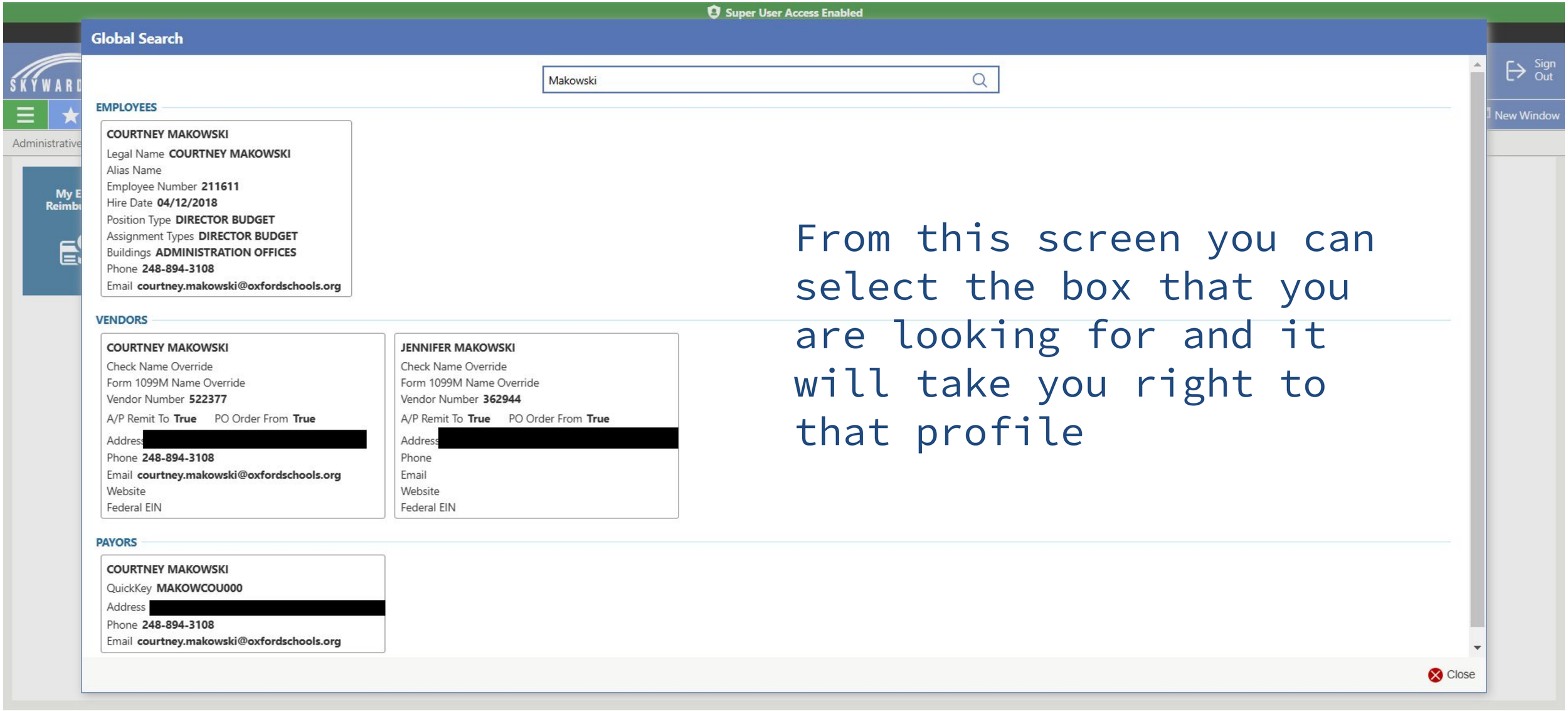
By selecting the arrow in the middle right of the screen you can open up the line and navigate through different menu options

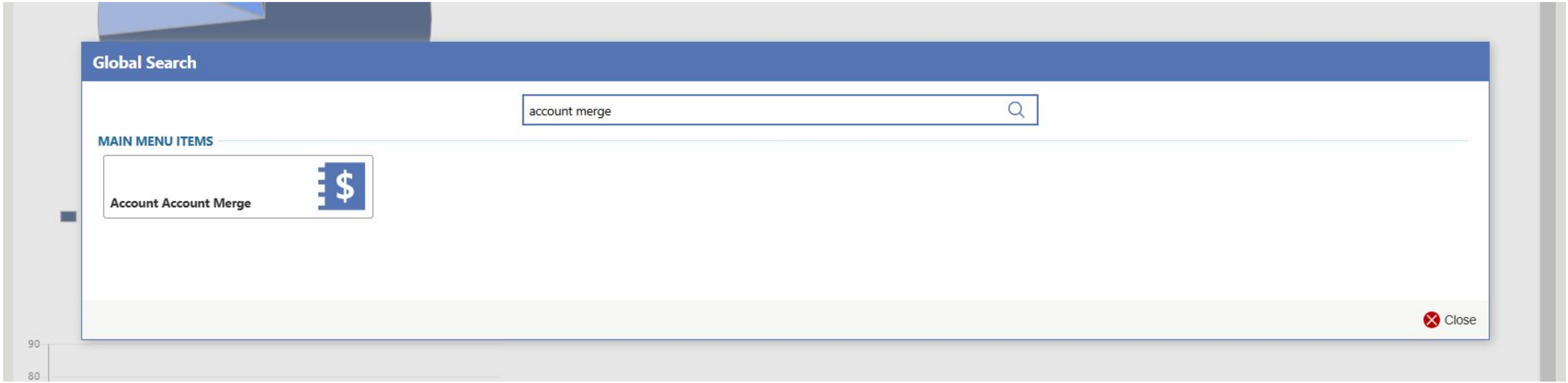
Global Search

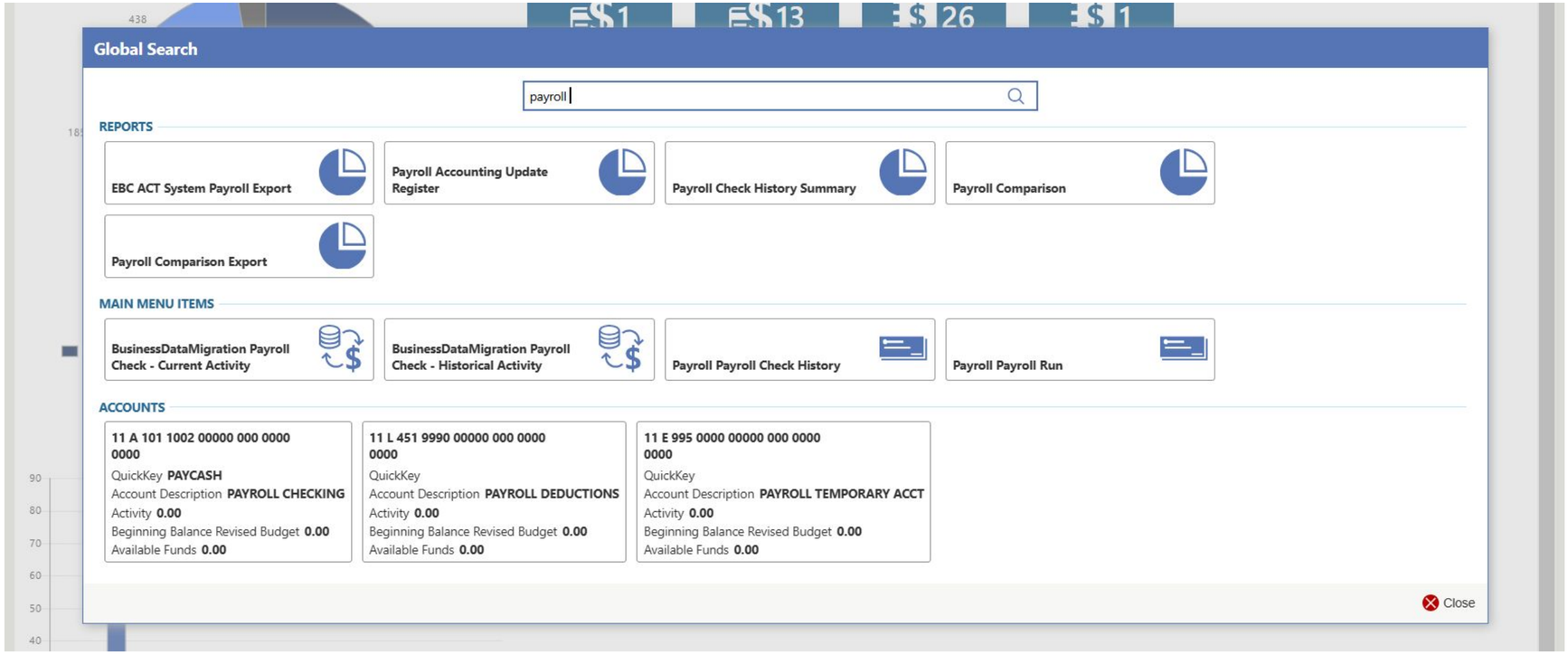


By selecting the magnifying glass on the menu bar you are able to search all areas of the system for a name

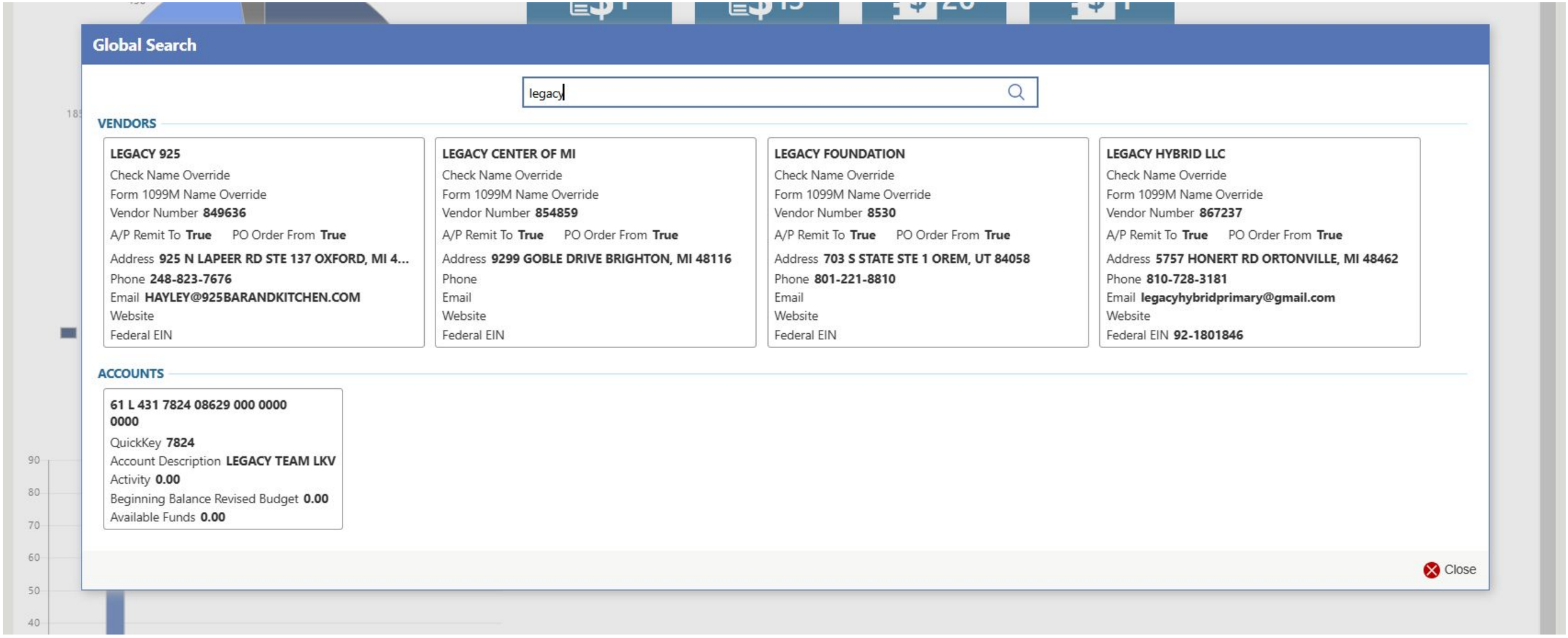

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Administrative Access
My Expense Reimbursement
My Credit Card Transaction Approvals
My Cash Receipt Approvals
My Journal Entry Approvals
Credit Card Transactions
100
Global Search
Makowski
Close


Super User Access Enabled
Global Search
Makowski
EMPLOYEES
COURTNEY MAKOWSKI
Legal Name COURTNEY MAKOWSKI
Alias Name
Employee Number 211611
Hire Date 04/12/2018
Position Type DIRECTOR BUDGET
Assignment Types DIRECTOR BUDGET
Buildings ADMINISTRATION OFFICES
Phone 248-894-3108
Email courtney.makowski@oxfordschools.org
VENDORS
COURTNEY MAKOWSKI
Check Name Override
Form 1099M Name Override
Vendor Number 522377
A/P Remit To True PO Order From True
Address [redacted]
Phone 248-894-3108
Email courtney.makowski@oxfordschools.org
Website
Federal EIN
JENNIFER MAKOWSKI
Check Name Override
Form 1099M Name Override
Vendor Number 362944
A/P Remit To True PO Order From True
Address [redacted]
Phone
Email
Website
Federal EIN
PAYORS
COURTNEY MAKOWSKI
QuickKey MAKOWCOU000
Address [redacted]
Phone 248-894-3108
Email courtney.makowski@oxfordschools.org
Close
From this screen you can select the box that you are looking for and it will take you right to that profile

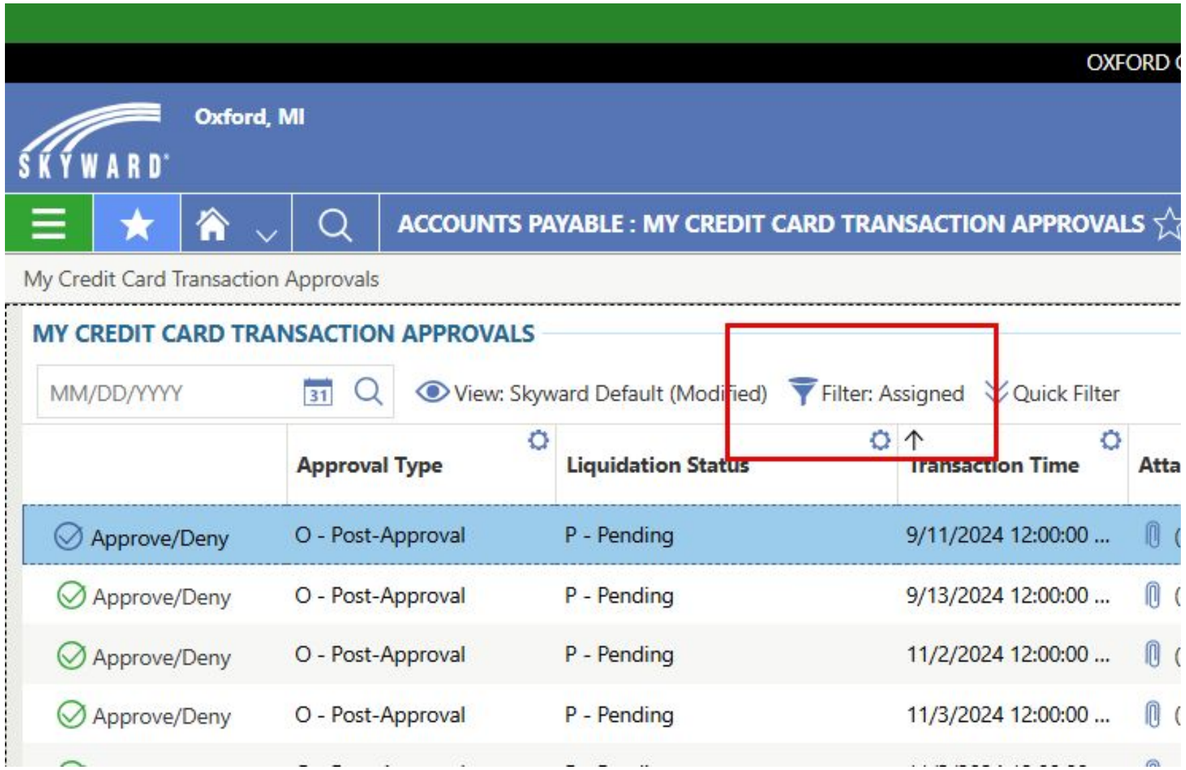




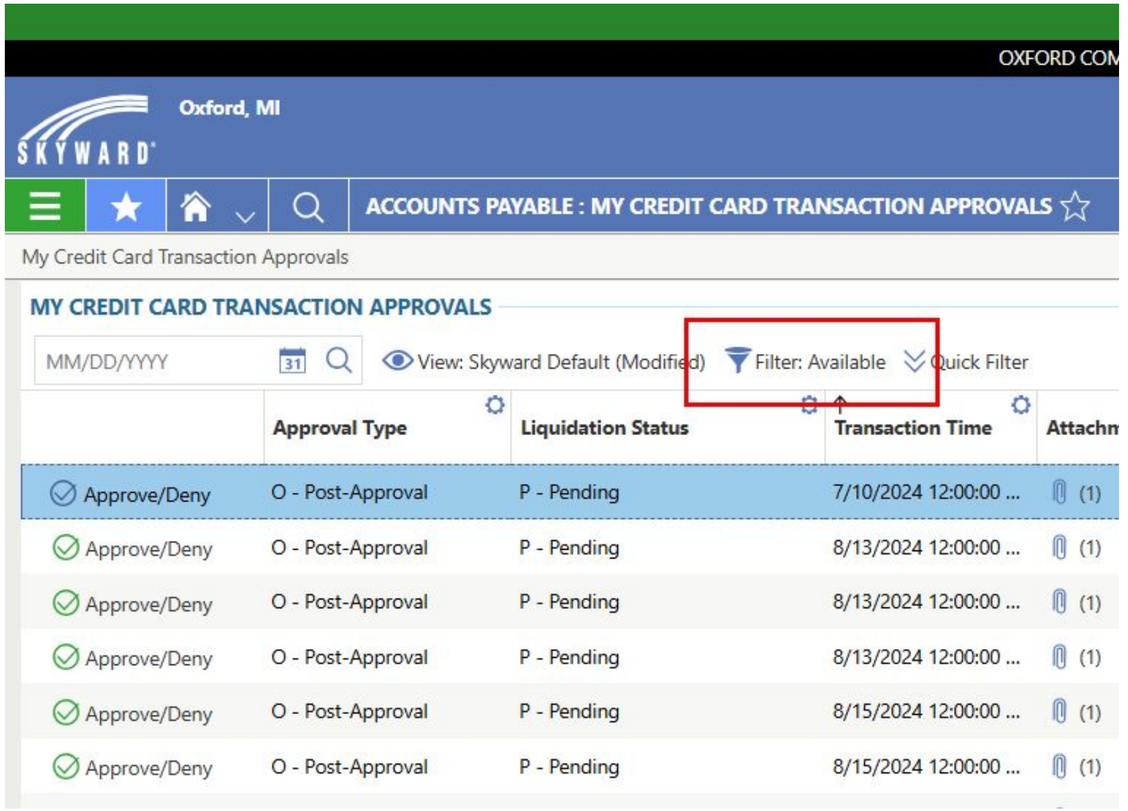
This feature can also be used to search other keywords such as utilities, reports, accounts, etc.


Global Search
legacy
VENDORS
LEGACY 925
Check Name Override
Form 1099M Name Override
Vendor Number 849636
A/P Remit To True PO Order From True
Address 925 N LAPEER RD STE 137 OXFORD, MI 4...
Phone 248-823-7676
Email HAYLEY@925BARANDKITCHEN.COM
Website
Federal EIN
LEGACY CENTER OF MI
Check Name Override
Form 1099M Name Override
Vendor Number 854859
A/P Remit To True PO Order From True
Address 9299 GOBLE DRIVE BRIGHTON, MI 48116
Phone
Email
Website
Federal EIN
LEGACY FOUNDATION
Check Name Override
Form 1099M Name Override
Vendor Number 8530
A/P Remit To True PO Order From True
Address 703 S STATE STE 1 OREM, UT 84058
Phone 801-221-8810
Email
Website
Federal EIN
LEGACY HYBRID LLC
Check Name Override
Form 1099M Name Override
Vendor Number 867237
A/P Remit To True PO Order From True
Address 5757 HONERT RD ORTONVILLE, MI 48462
Phone 810-728-3181
Email legacyhybridprimary@gmail.com
Website
Federal EIN 92-1801846
ACCOUNTS
61 L 431 7824 08629 000 0000 0000
QuickKey 7824
Account Description LEGACY TEAM LKV
Activity 0.00
Beginning Balance Revised Budget 0.00
Available Funds 0.00
Close

Assigned vs Available

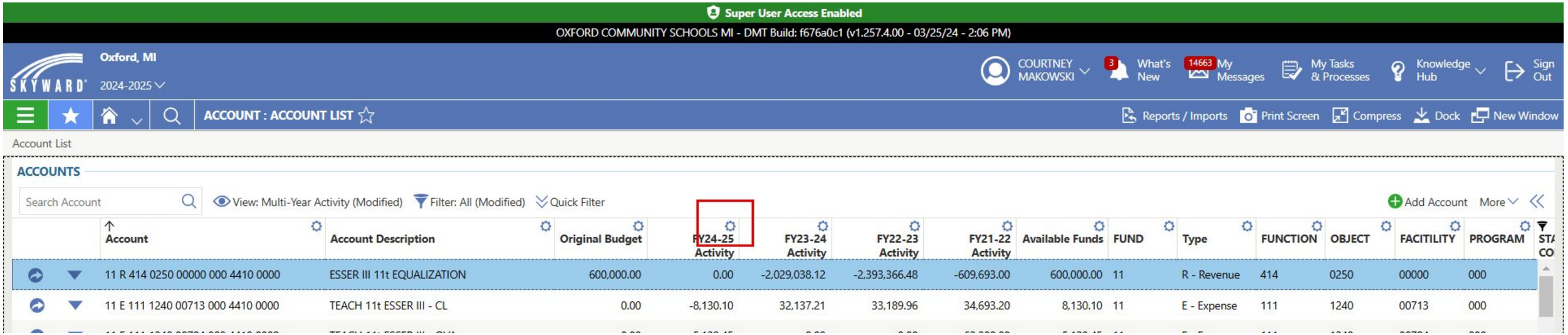


Assigned = Waiting for your level of approval



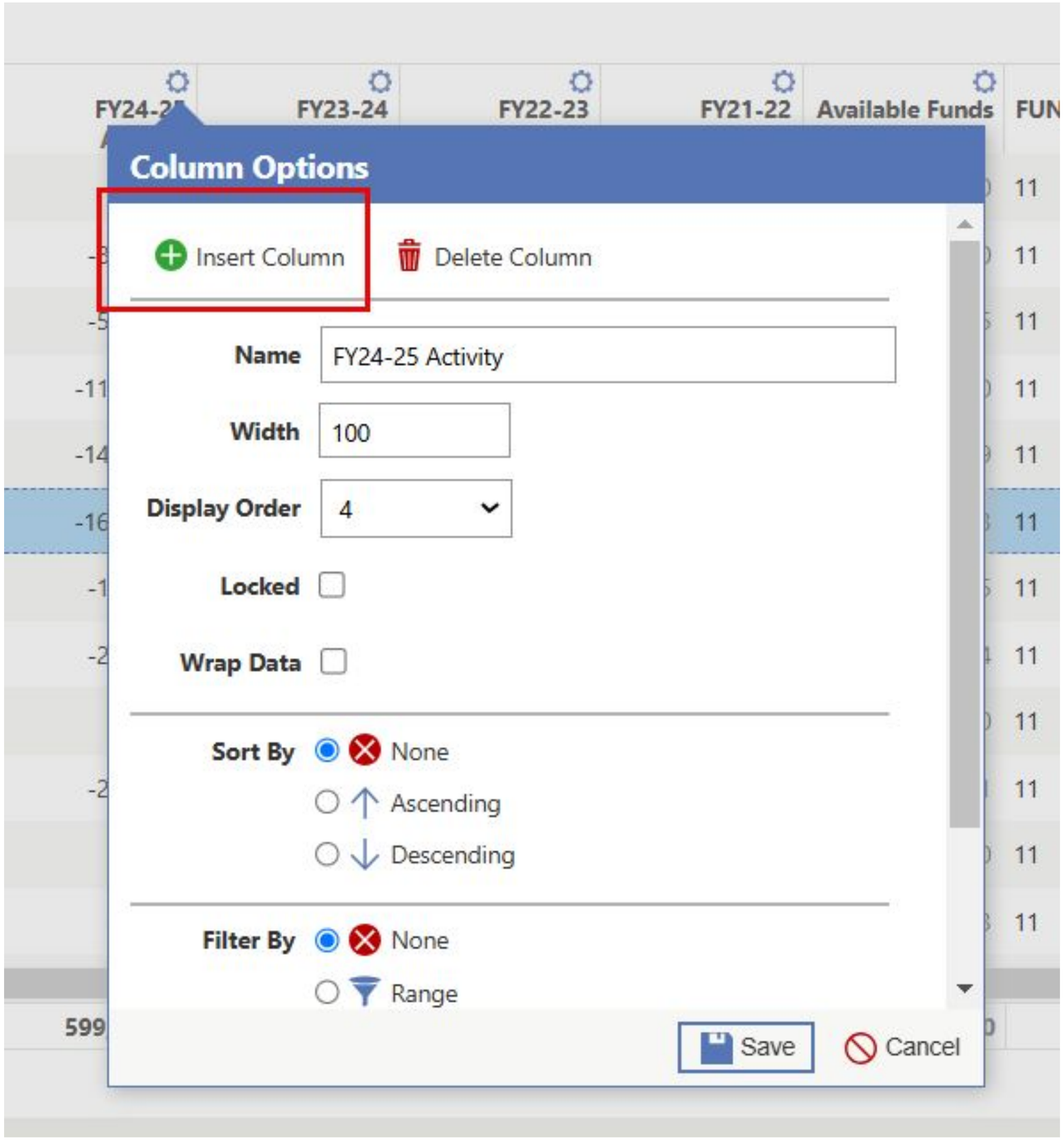
Available = Waiting on a lower level of approval

Customize list screens



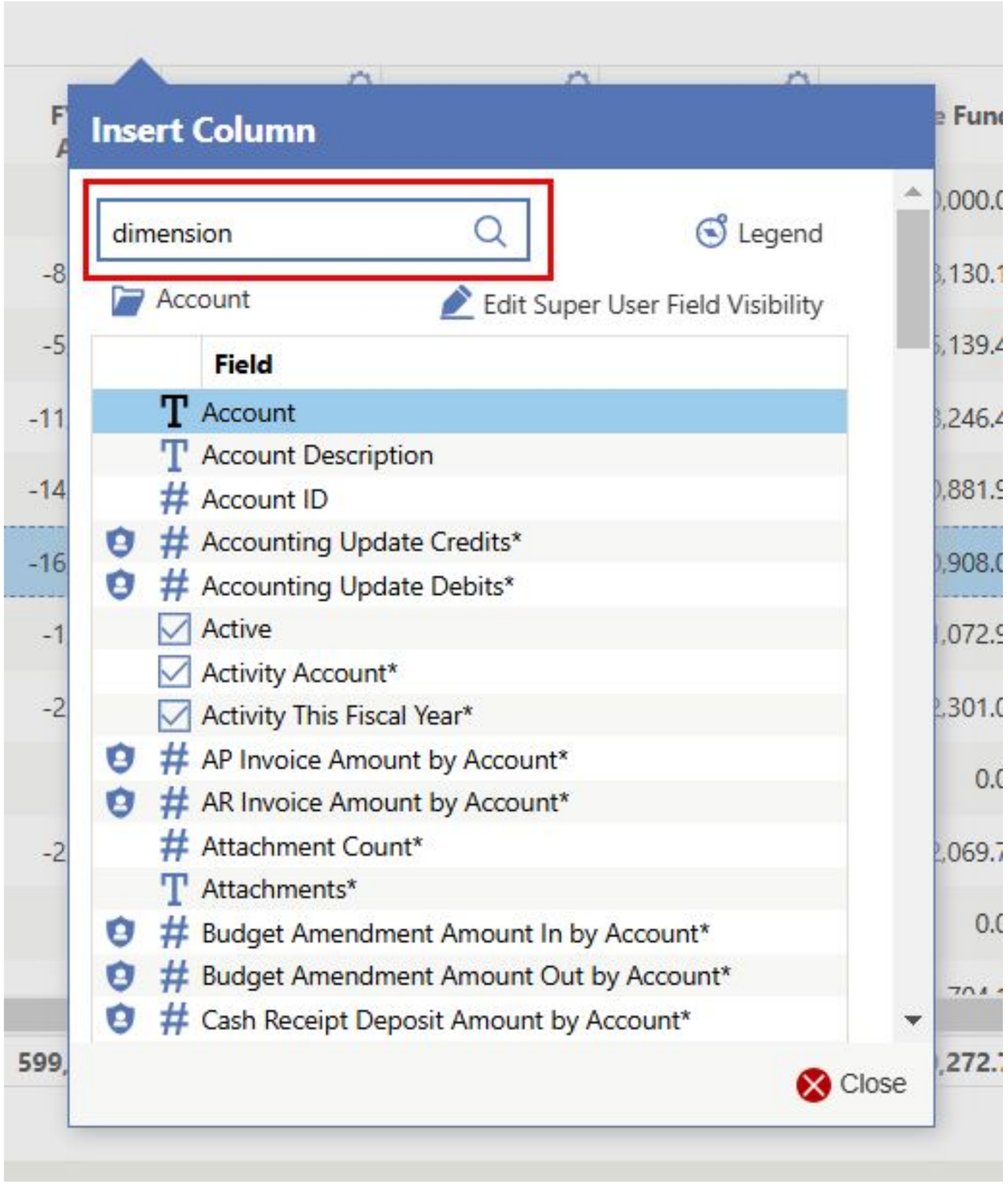
Customizing list screens allows you to have quick access to different data sets

Select the “wheel” on any column

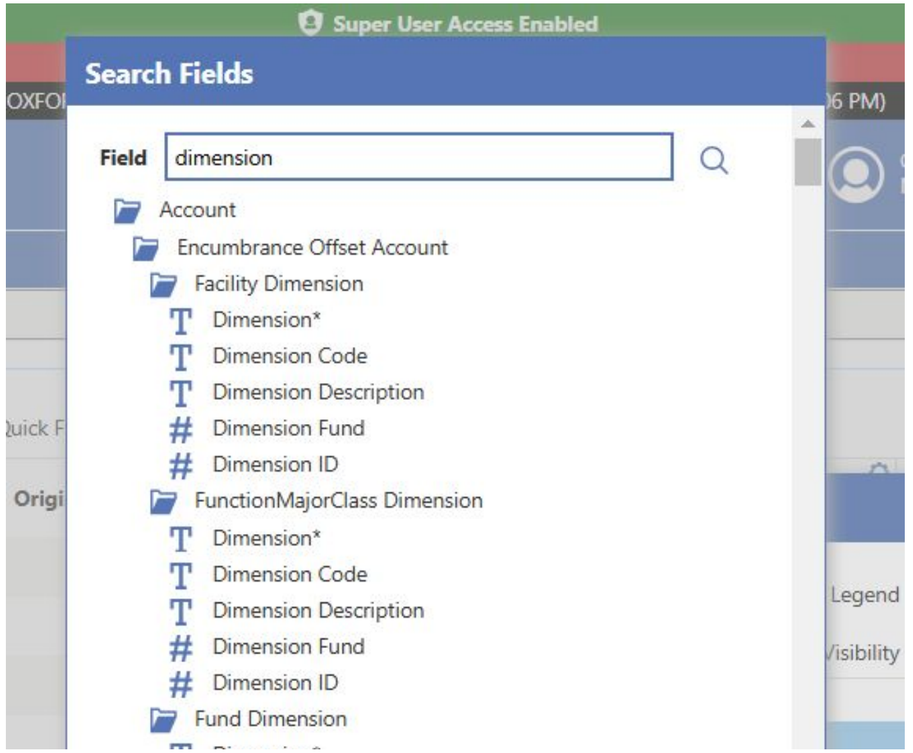


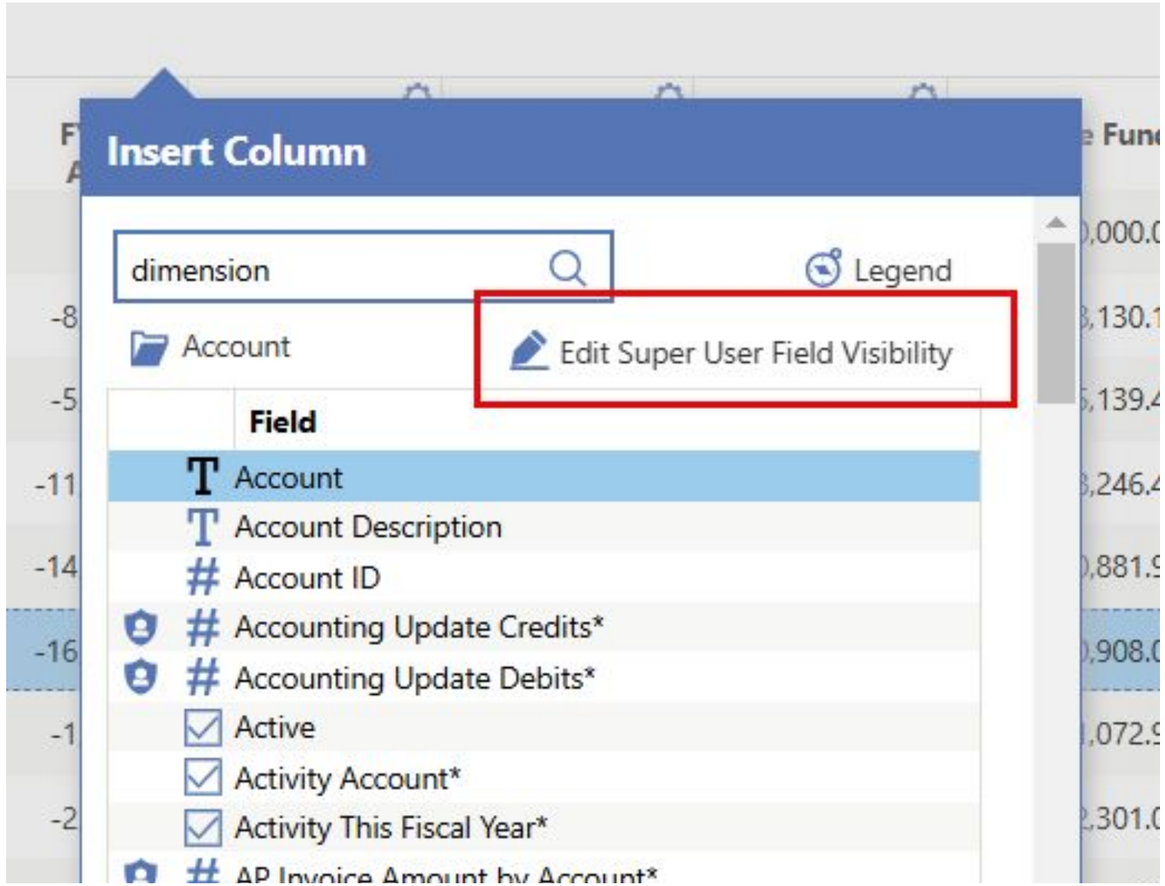
Select “Insert Column” to pull up a list of options.

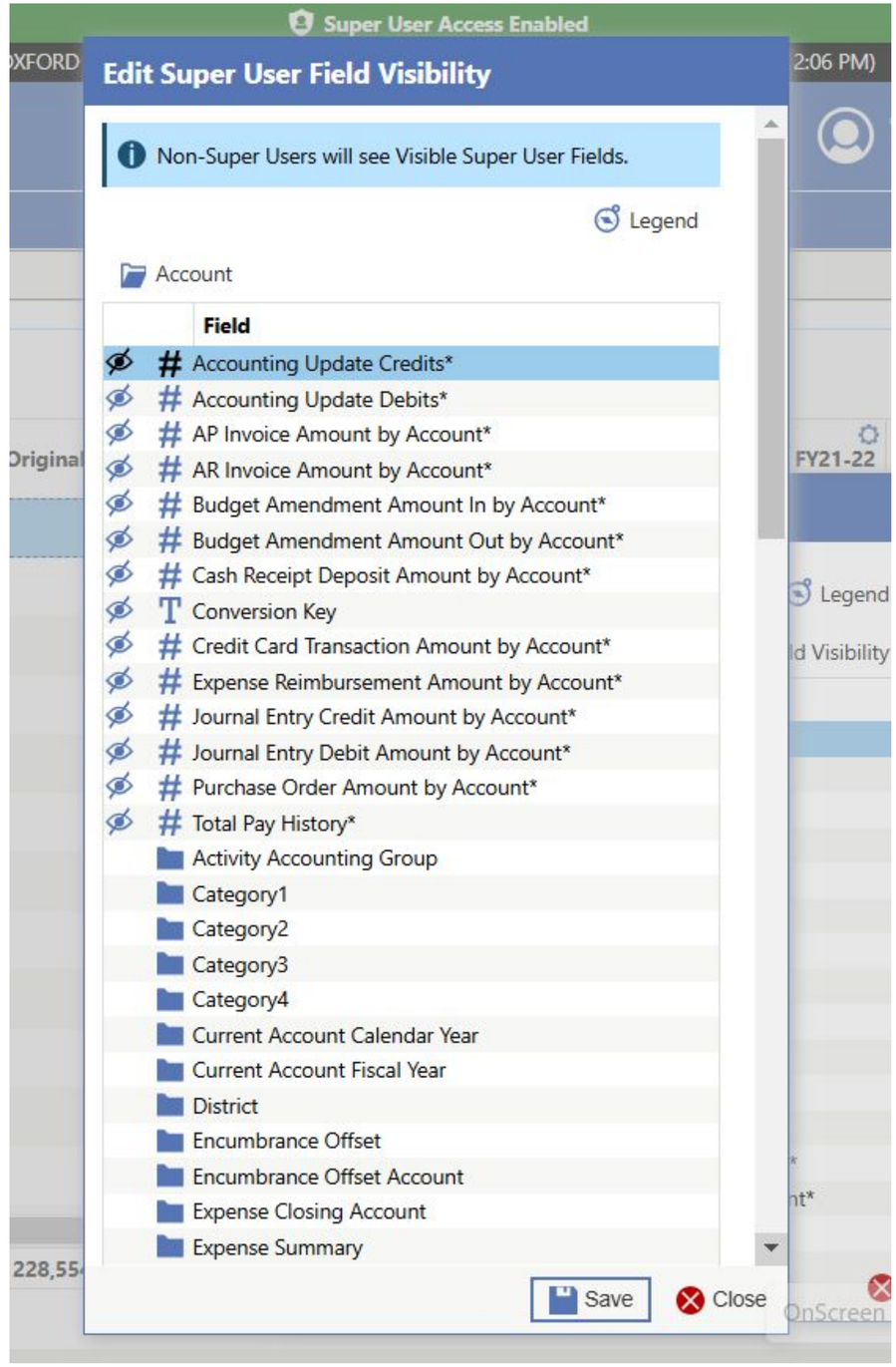
This screen also allows you to customize a field already included. You can rename, adjust width, change sort order, etc



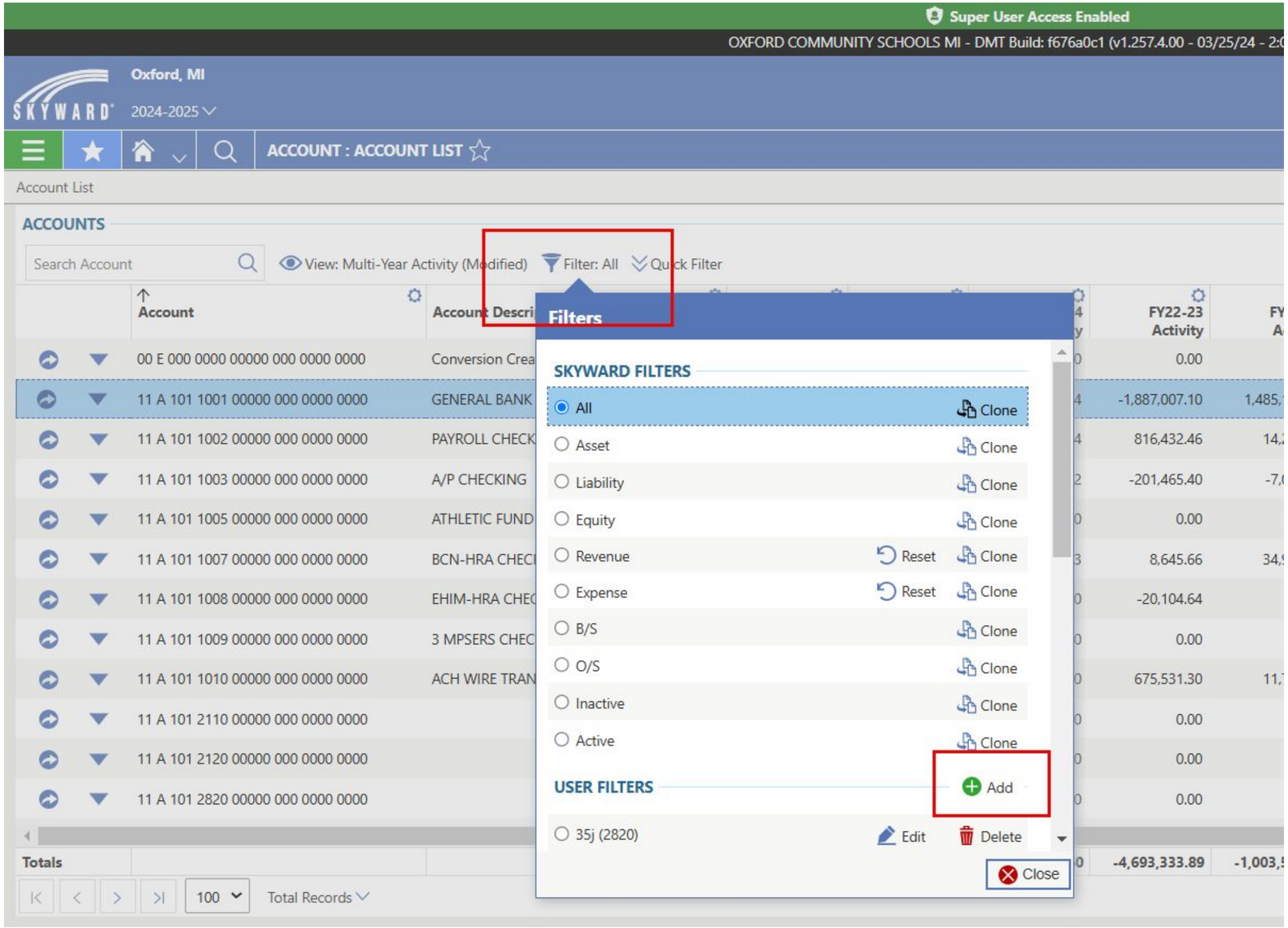
You can either search to open options based on a key word - **OR** - Select from the list/folders provided



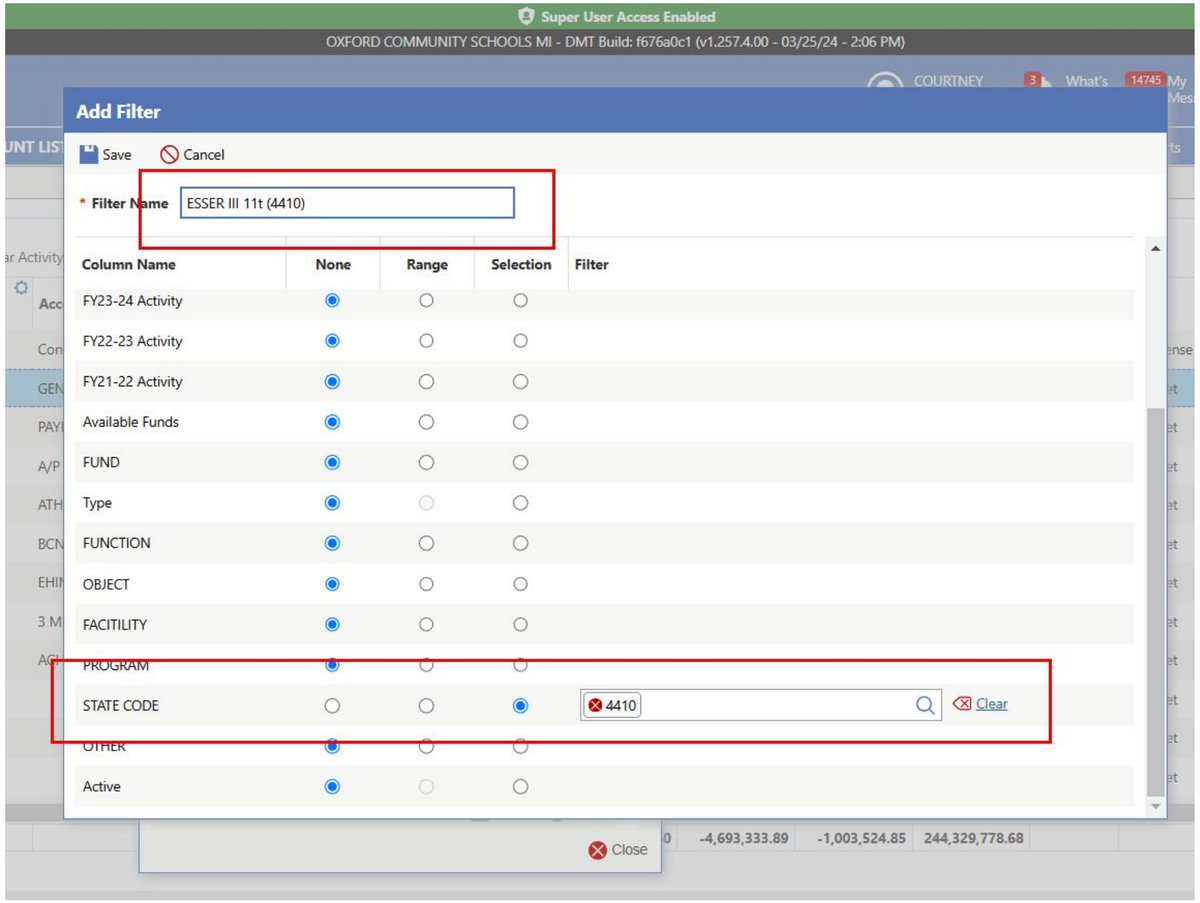


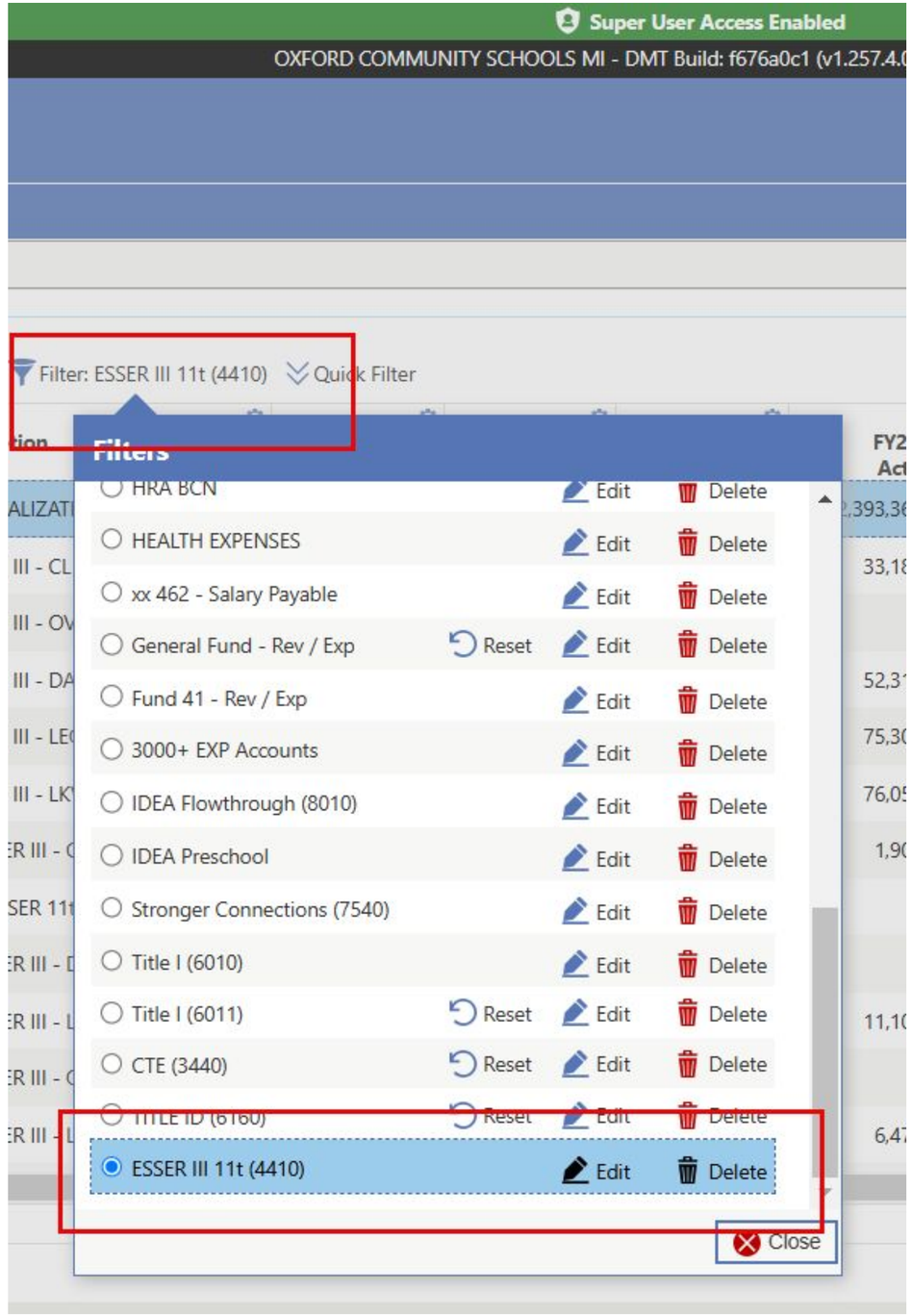


Some fields are only viewed by Super Users. To allow non-super users to view those restricted fields you must select in this window.

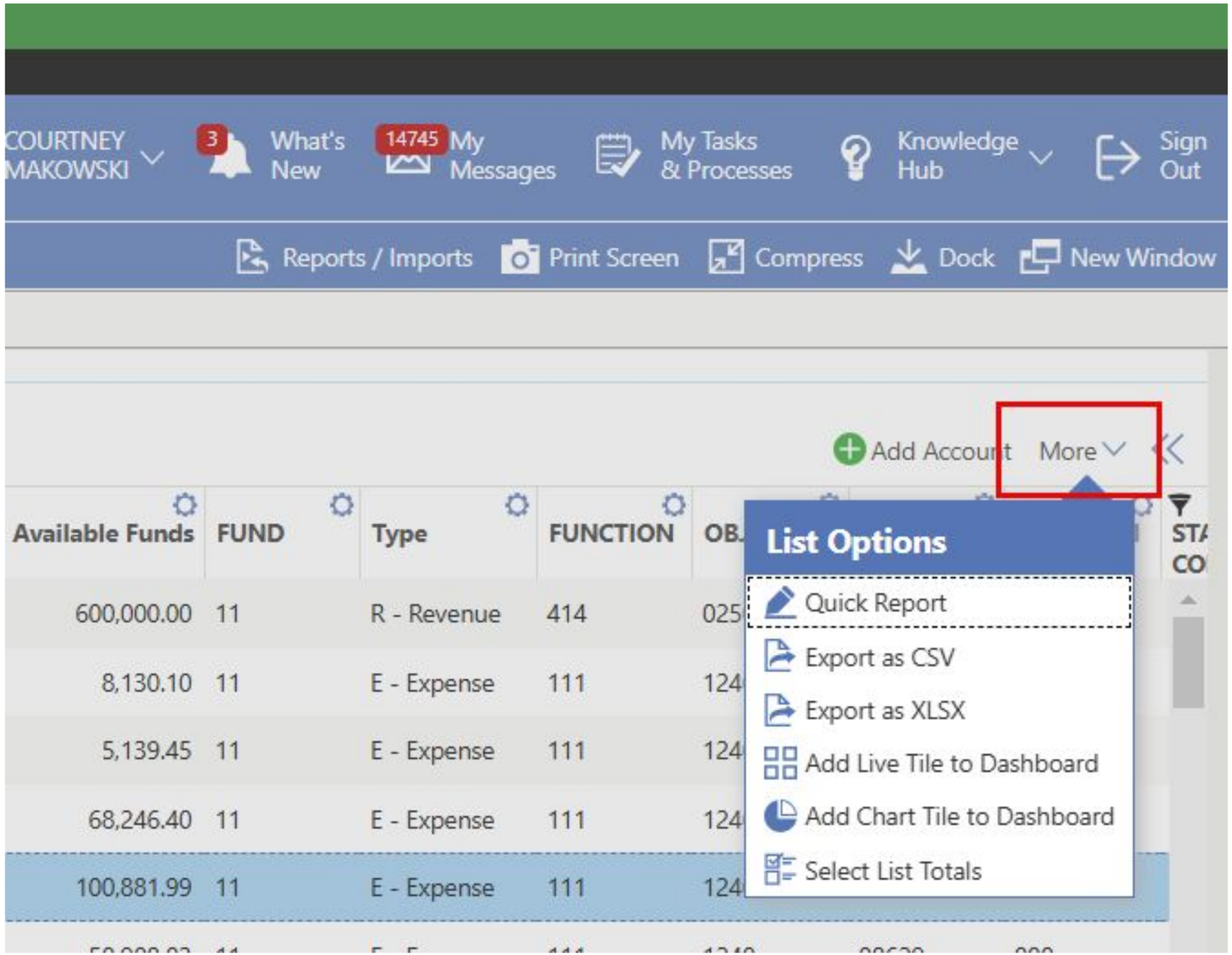


You can set up quick filters based on different parameters such as account type, fund, grant, etc



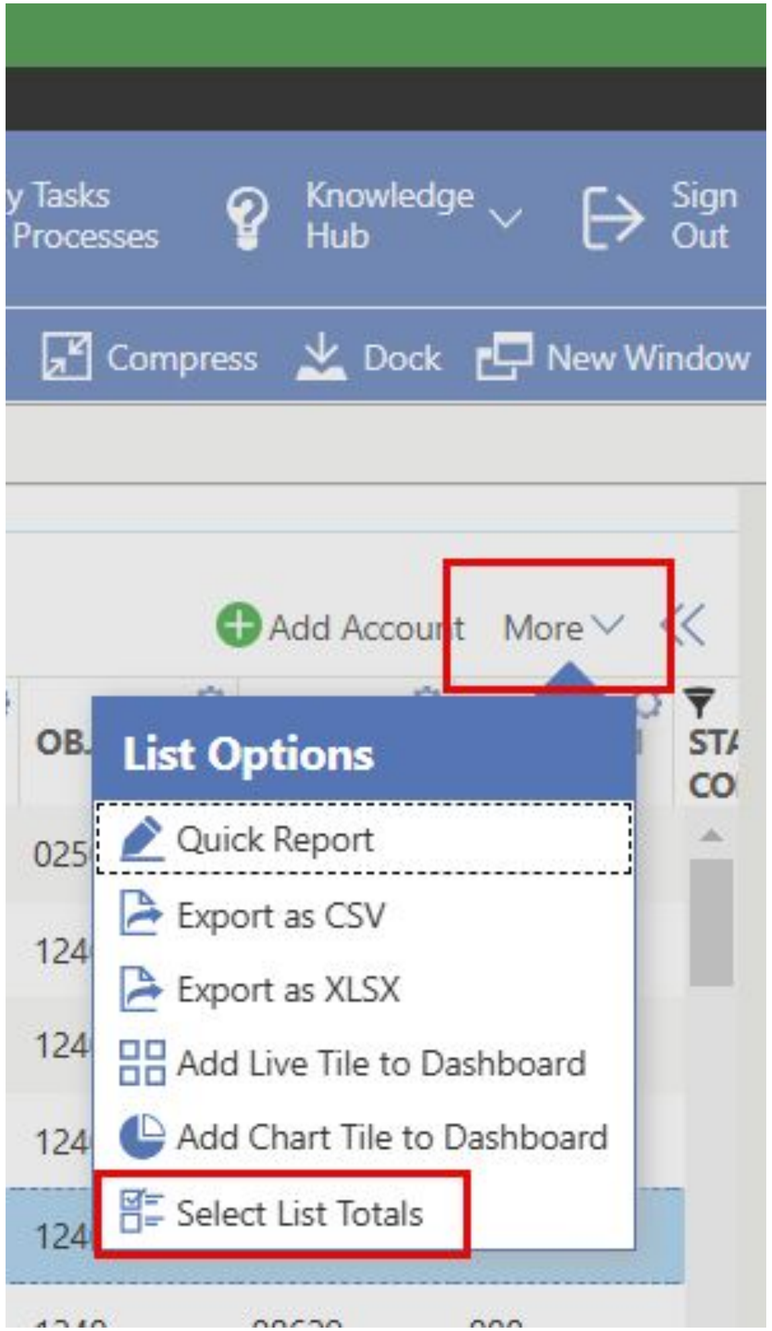


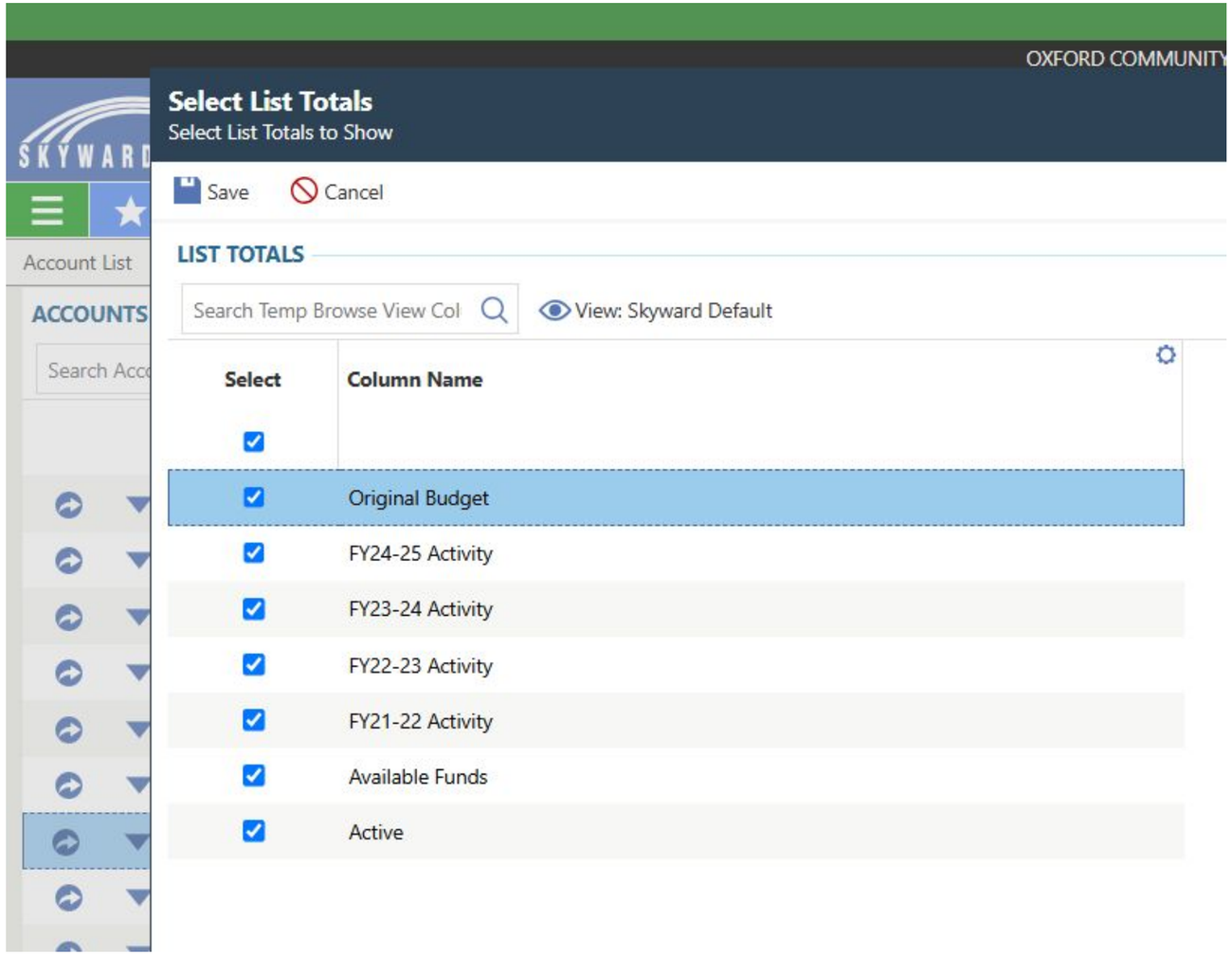
Set the desired parameters and name the filter. It will be found in your filter list after you save.

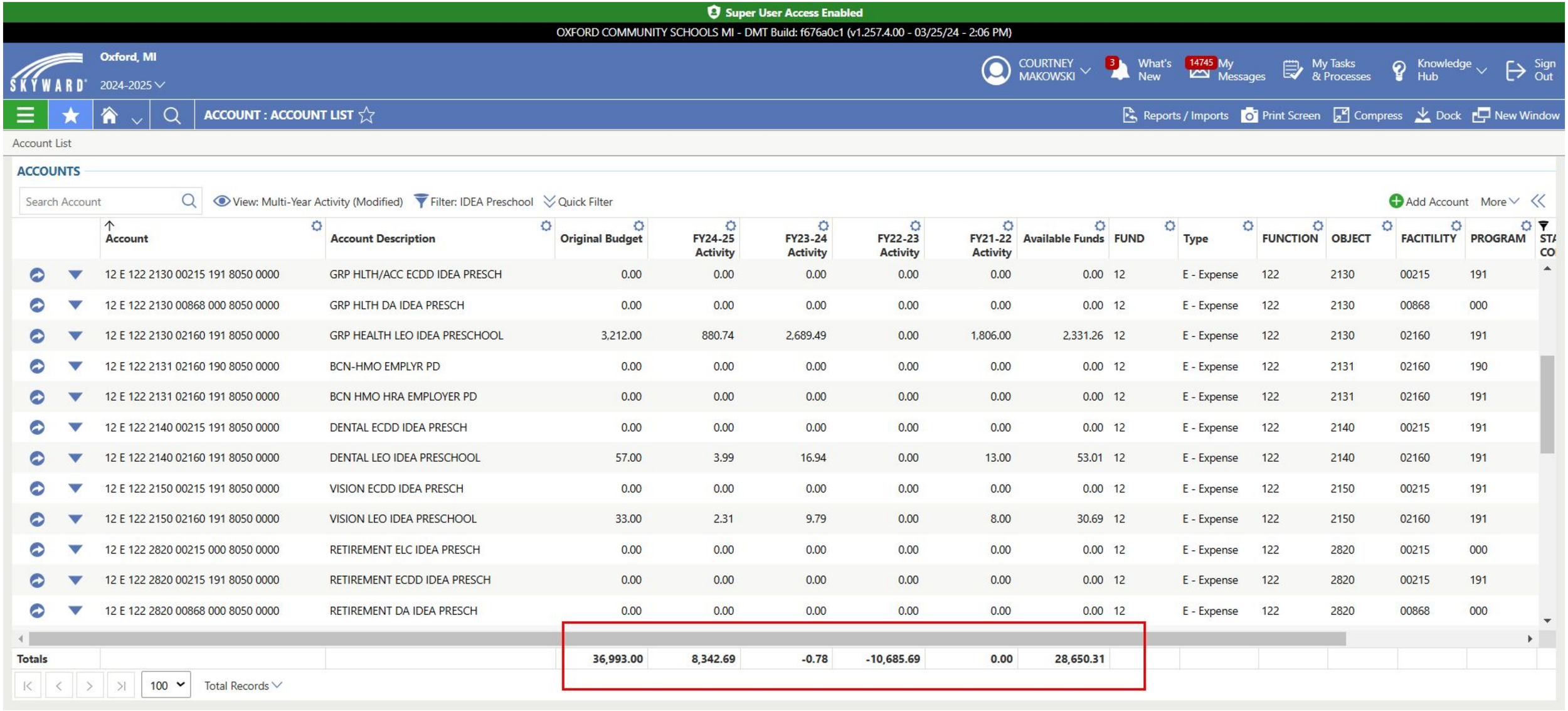


Selecting the “More” button gives you options on how you can extract the data (ex. Quick report, excel, or add to a live tile)

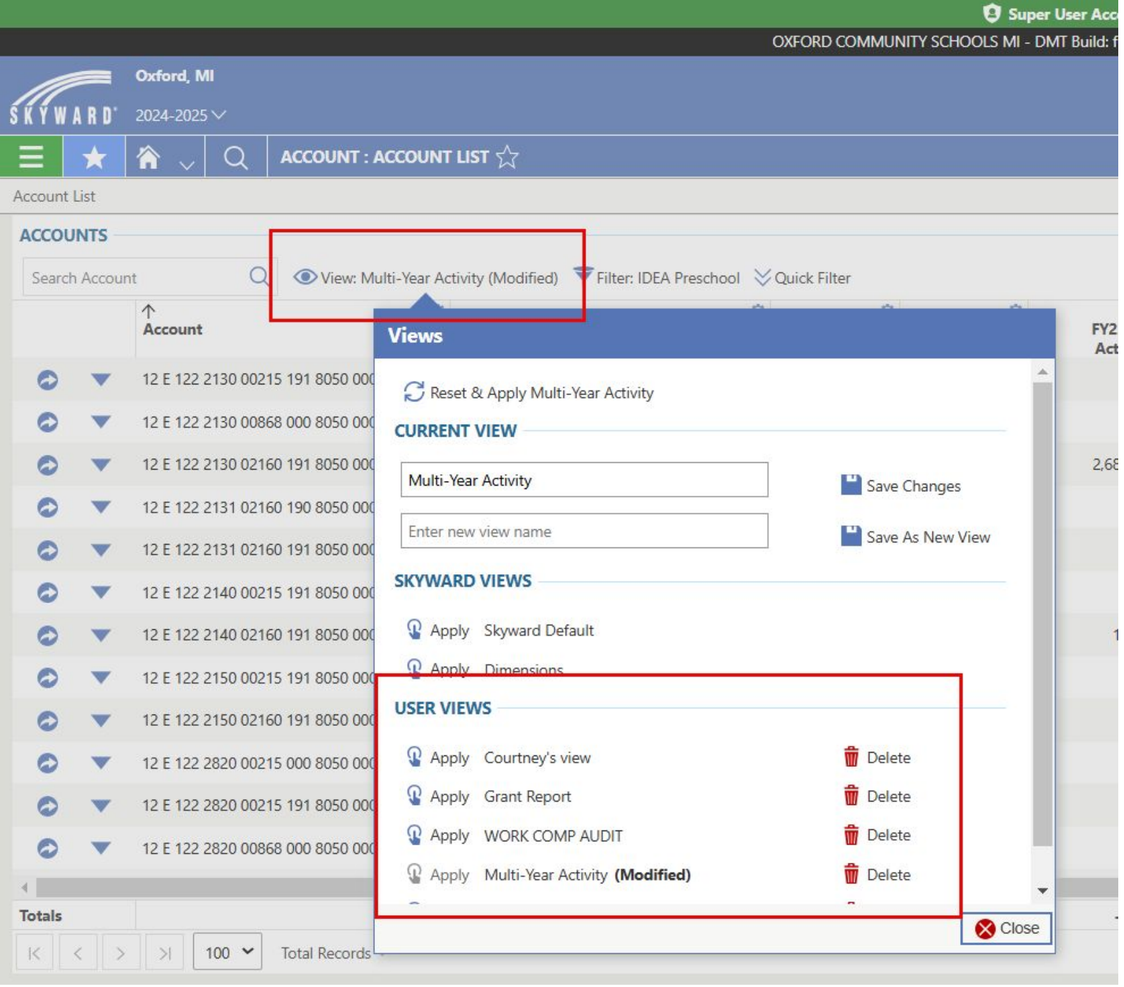
Also found in the “More” button is the List Totals



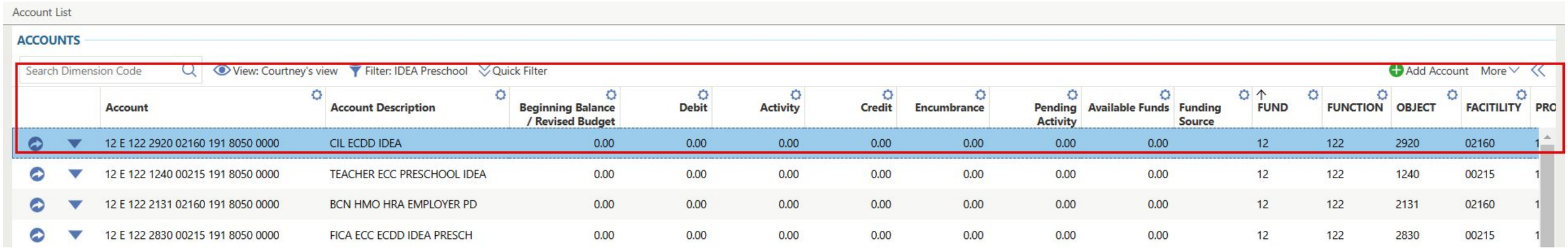




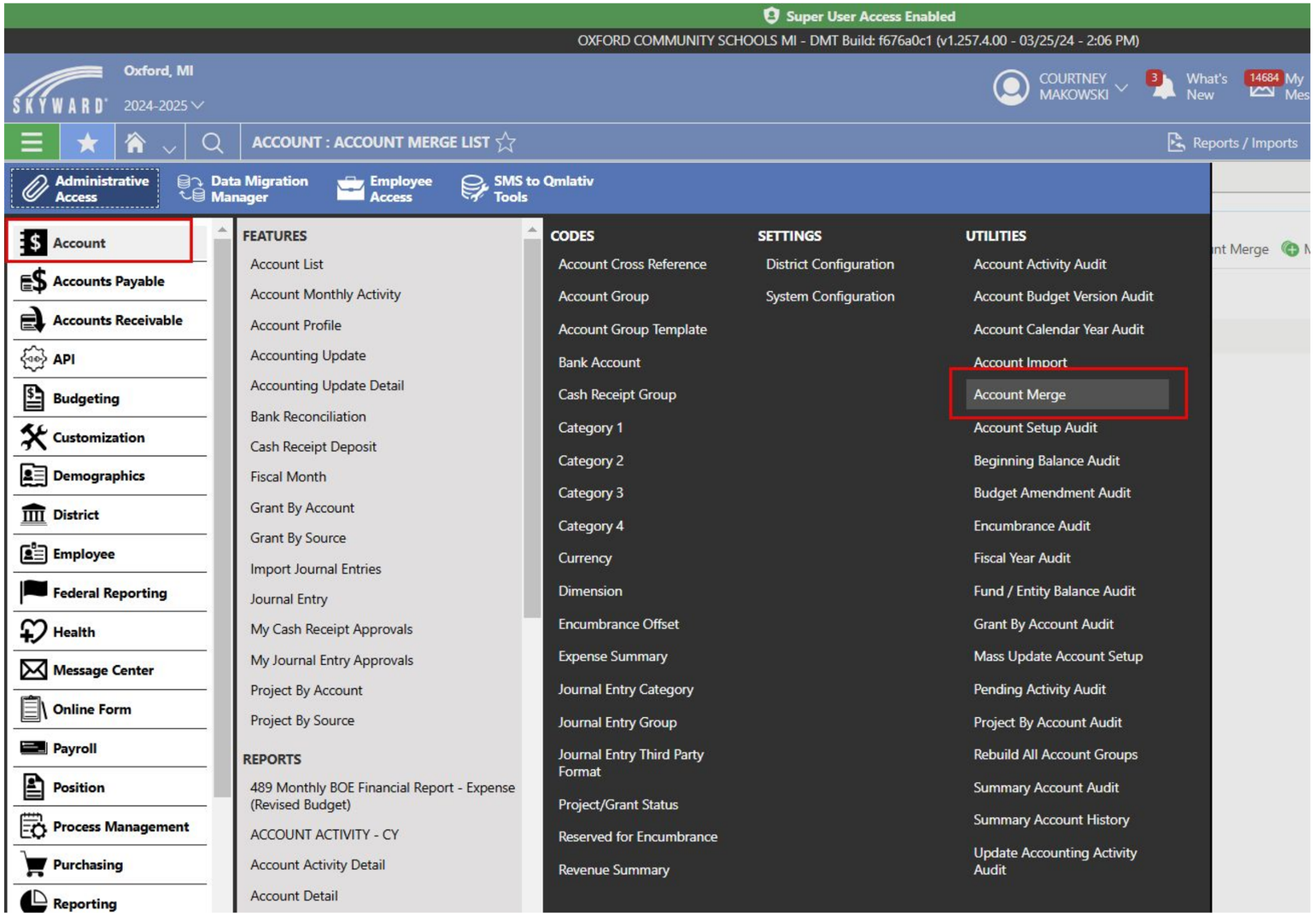
This gives real time data totals to each column on the list screen.



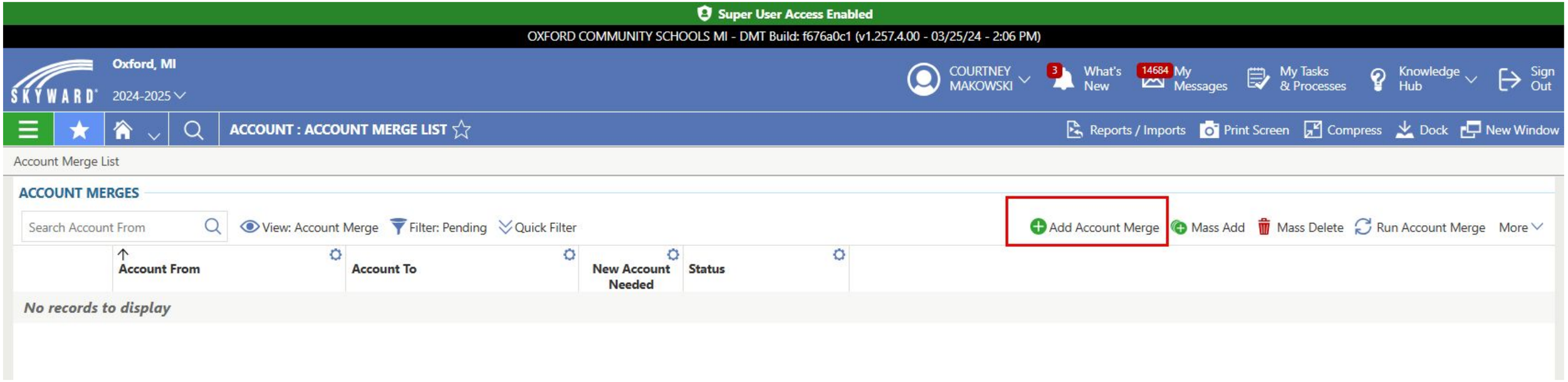
You can also customize the “View” which will change the columns shown on the list screen.

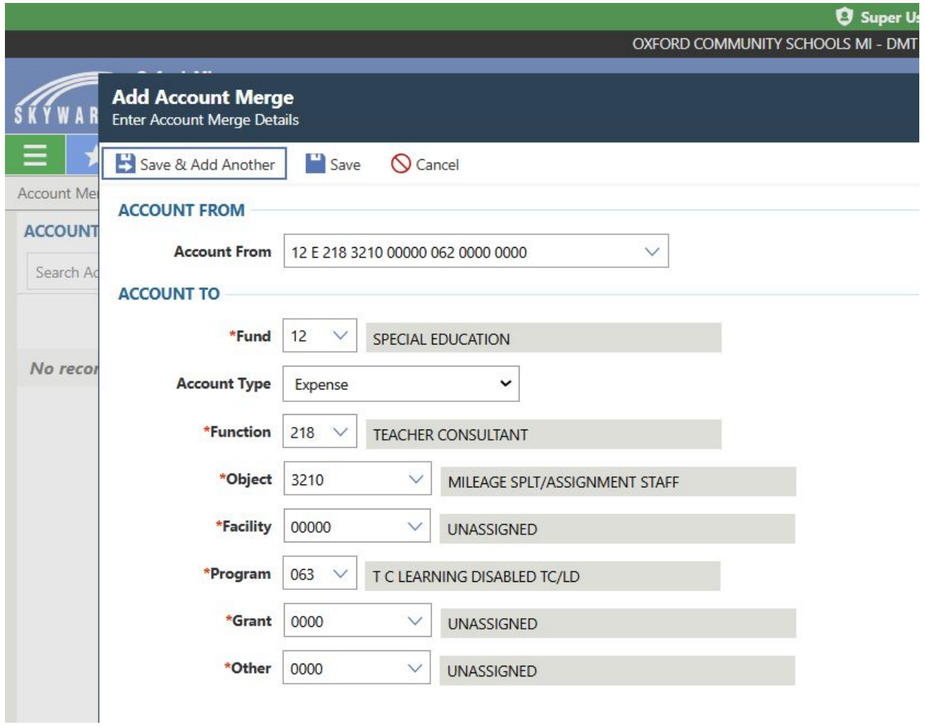


Account Merge

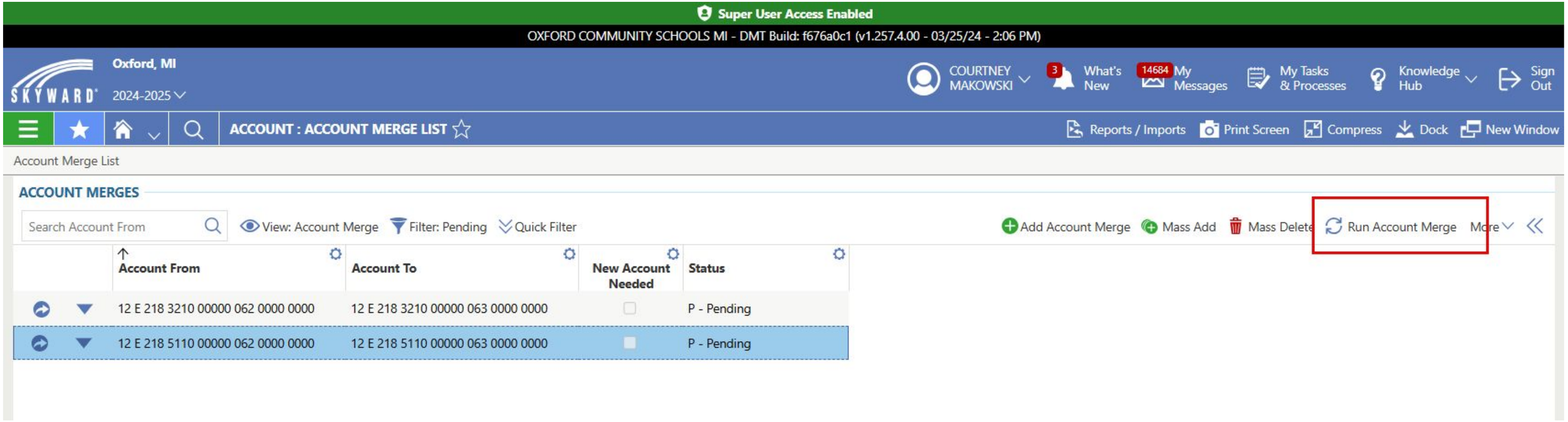


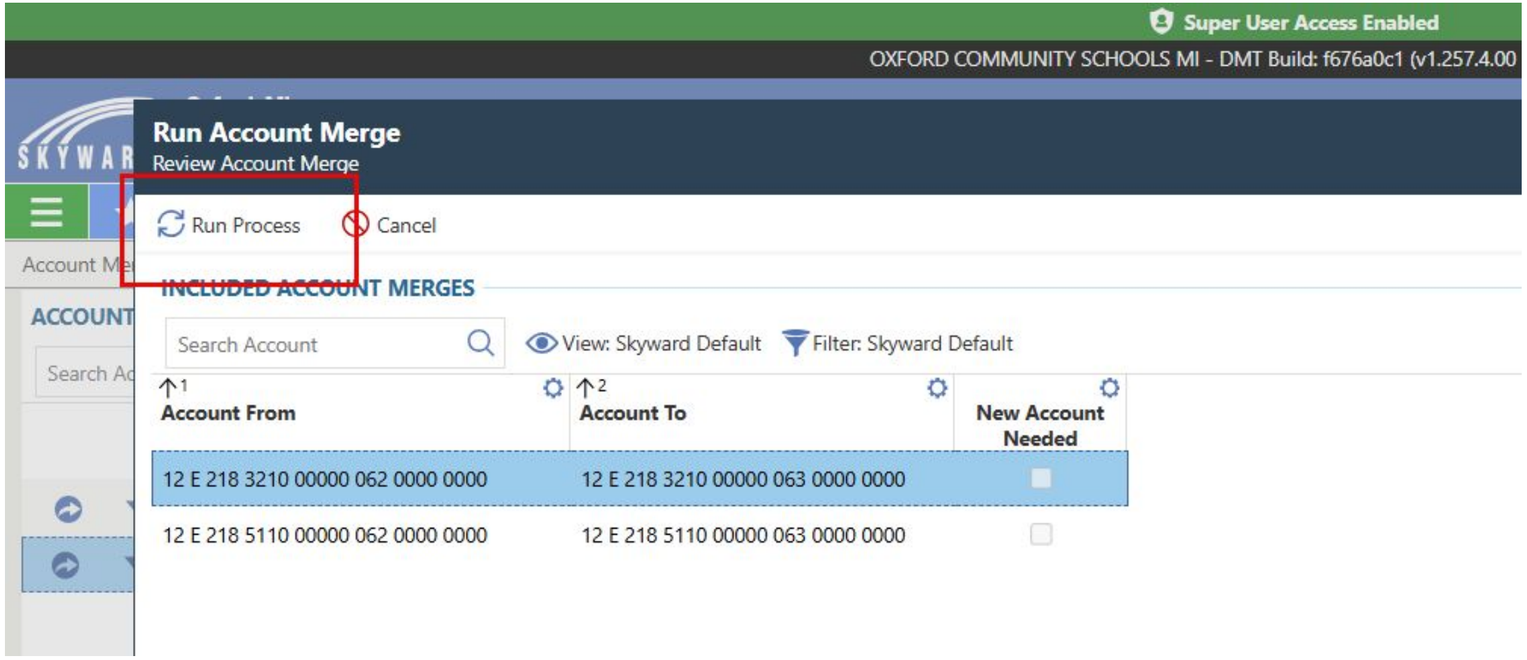
This feature is used when you need to move history from one account to another



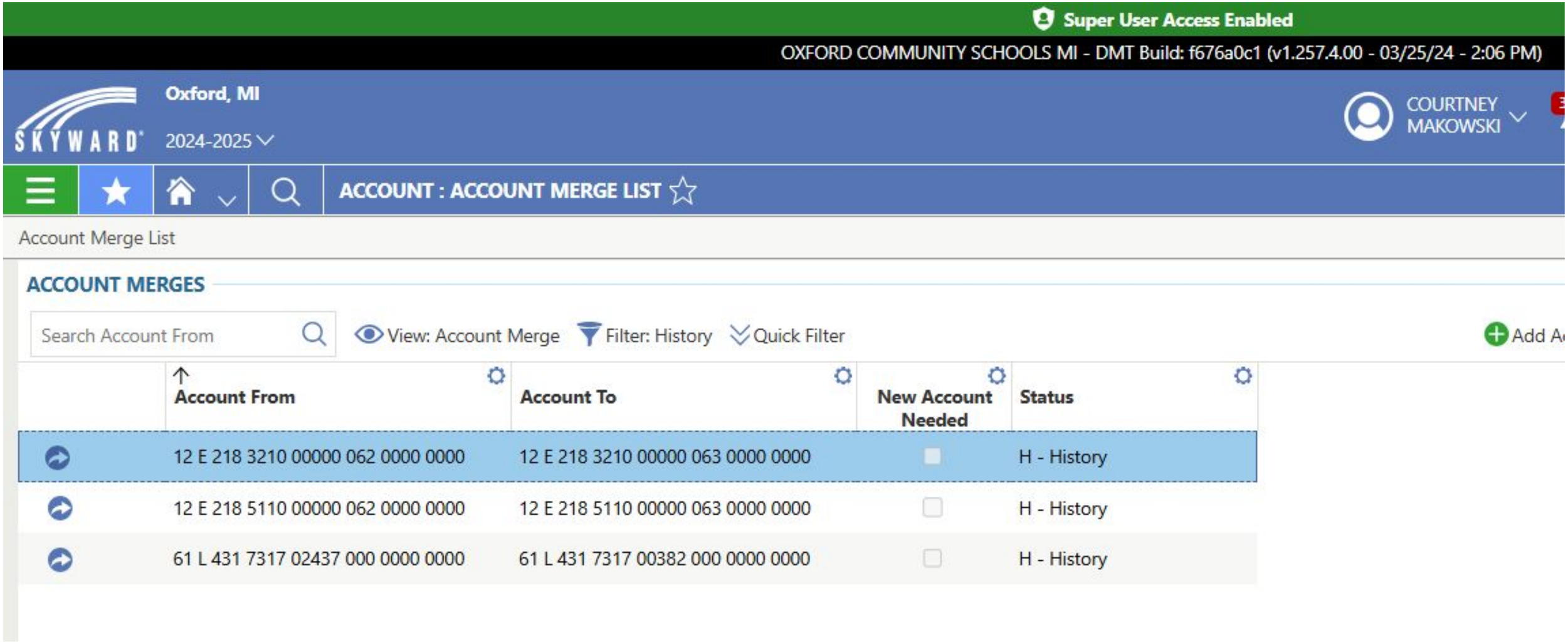


This process will also create new accounts if they are not already made before running the utility.





Be sure to review accounts for accuracy before selecting “Run Process”



You can see a list of all accounts that have been merged if you change filter to “History”

Skyward Videos for SMS to Q

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