WISER

Navigation and Use Training for the
WISER Dashboard, Department Search,
and Project Search Features

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What is WISER?

- WISER is the accounting database that is replacing WISDM across all of UW-System.

- WISER takes expense and revenue data generated in other systems (i.e. purchase order, p-card, payroll) and organizes it in ways that meet the needs of the end user.

- WISER includes all of the financial records included in WISDM and will track all records going forward.

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Basic Navigation: Landing Page

- Links to the WISER Landing page are available through the Business Services webpage. Links will be posted in the same location the WISDM links currently reside on the UWL Webpage.

- When logging into WISER, you are always brought to your Dashboard (also known as your Tile Screen or Home Screen).

- When logging in for the first time, you should see a 'Welcome to WISER' notification. This screen will change once you start to set up your tiles.

- The Dashboard replaces the Favorites Function that is available in WISDM.

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Dashboard: Creating a Tile

- Also referred to as 'Pin to Dashboard'
- The blue link which looks like the following is available when you are searching accounts or transactions: · 📌 Pin to Dashboard
- The Pin to Dashboard function is essentially a bookmark of search. Use this function to quickly navigate to heavily visited accounts.
- When selecting the function, you will be asked what tile group to put it in. The first time you do this, you will need to create and name a group to organize it.

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Dashboard: Creating a Tile Continued

- Once you have added your first tile and created a group, your dashboard shows the tiles that you have pinned. Once you have an initial group set up, you can quickly create additional groupings (hit blue '+') or add tiles for webpage links outside of WISER (select gear on right and hit 'New tile Link'):
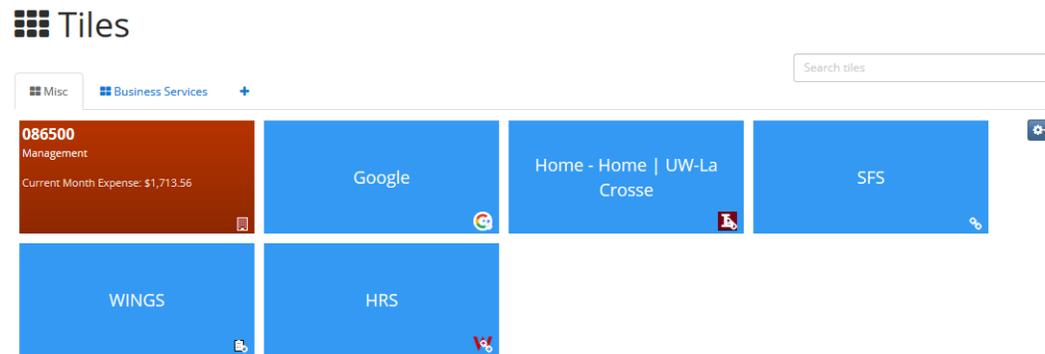
Dashboard: Tile Functions

- Tiles can be:
  - **Selected** to navigate to the page/item they represent.
  - **Dragged & dropped** to change displayed order.
  - **Unpinned** (deleted) by selecting the X that appears when hovering on a tile.
  - **Resized** by selecting the up or down arrow that appears (if option is available) when hovering on a tile.
  - **Searched** for by entering text in the *Search Tiles* textbox (all tabs are searched, and results displayed).

Dashboard: Side Bar Menu

- The side bar is only visible when you are looking at the dashboard, and it indicates the current running status of WISER. It also allows you to view announcements on the database performance in the 'Messages' tab.
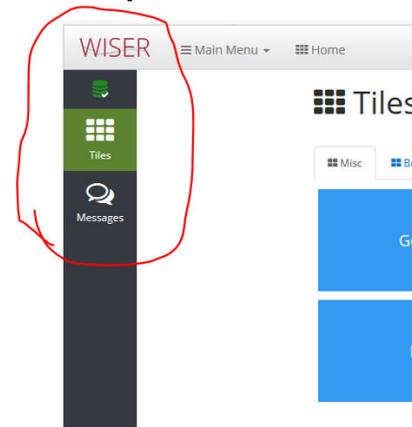
Basic Navigation: Top Menu Bar
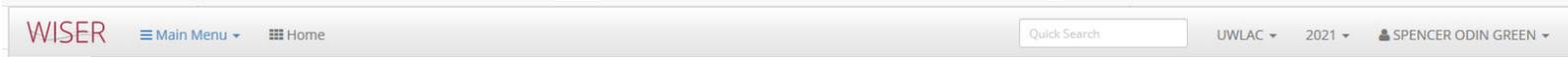
- The Top Menu Bar is always visible when you are moving throughout WISER.

- The red 'WISER' tag will immediately bring you back to your dashboard.

- The 'Main Menu' dropdown allows you to see all the areas that you can run various searches in the WISER Database. There will be more on this later.

- The 'Home' button also brings you back to your dashboard.

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Basic Navigation: Top Menu Bar Continued

- **Quicksearch box:** allows you to enter a piece of information (Dept/Project/text) for which WISER will create a listing of occurrences found. The displayed items are selectable and will navigate you to that page.

- **Business Unit:** This will always stay as UWLAC for all UWL Employees.

- **Fiscal Year:** Select this dropdown to choose a year to look into.

- As a user, your name appears as the final item on the top bar. Selecting 'Settings' from the user pulldown allows you the ability to change the background color of WISER. The Datamart tab in settings provides information on accessing the WISDM Database. Selecting Sign out will close the WISER application.

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Basic Navigation: Main Menu Pulldown

- The Main Menu pulldown lists all the pages/functions that you, as a user, have permission to utilize.
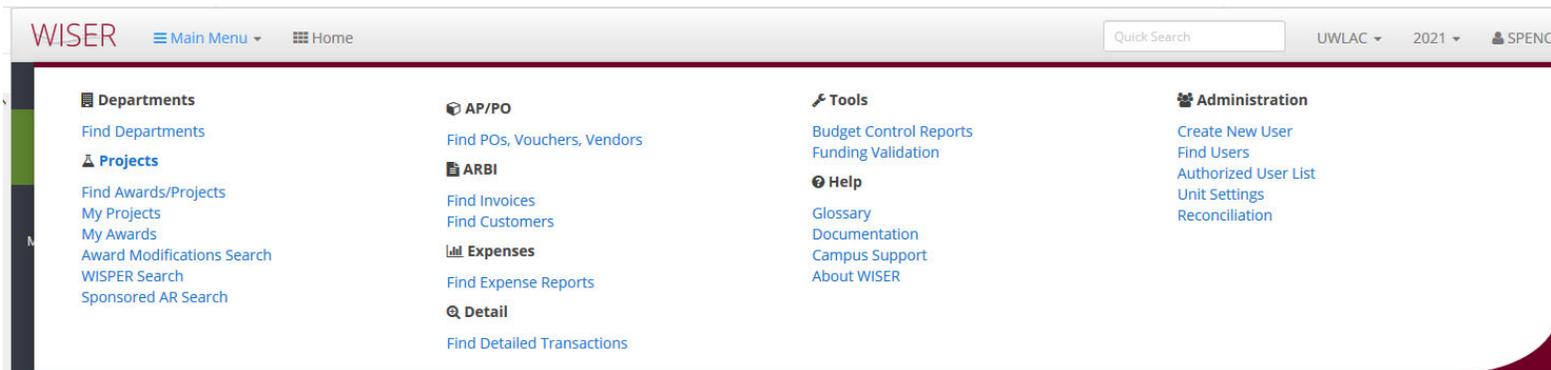
Finding Departments

- The search function allows you to search by Department ID, department description, or WISER Manger Name.

Find Departments Identify department entities for financial detail

A Note on UW System Account Organization (Funding Strings)

- Funding Strings contain 4 or 5 different numbers. Knowing what each of these numbers means is important to grasping navigation in WISER. The 4 numbers that every account has is as follows:
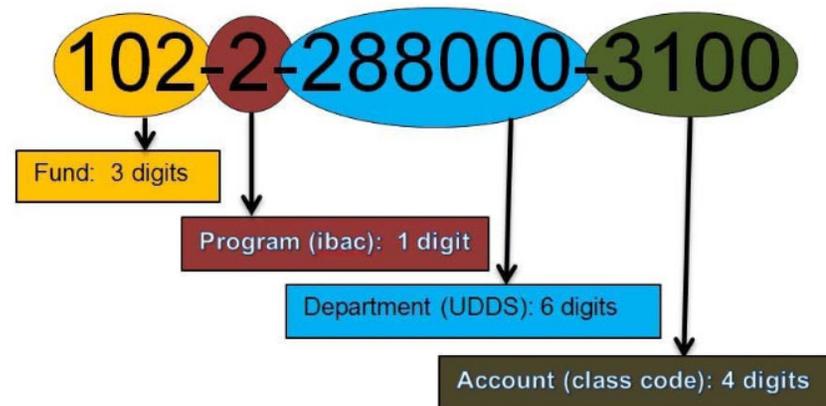
A Note on UW System Account Organization (Funding Strings): (cont.)

- **Funds:** Funds are three digits numbers that classify the source of the funding. Different funds place different restrictions on the use of the funds by the resource providers.

- **Example:** Fund 102 account are General program Revenue accounts that receive funding from tuition or the state of Wisconsin General Fund. Fund 144 funds come from the Federal Government.

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A Note on UW System Account Organization (Funding Strings): (cont.)

- **Program:** Program Codes (also known as Activity Codes) are single digits 0-9 and they classify the function of the department. This allows us to compare data between UW institutions. It is not uncommon for there to be multiple program codes within a department.

- **Example:** a code of 9 signifies that the department issues financial aid. A code of 2 indicates that the department function is Instruction related.

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A Note on UW System Account Organization (Funding Strings): (cont.)

- **The Department is 6 digits.** The first two Digits indicate the division or college, the middle two digits indicate the department within that division, and the last two digits are indicate a sub department.

- **Example: Department 282200.** 28 indicates it's the College of Liberal Studies, 22 is the art department, and 00 is the sub department.

- Note that departments that have sub department digits of 99 are external grant departments and departments that end in 98 are internal grant departments.

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A Note on UW System Account Organization (Funding Strings): (cont.)

- Revenues and expenditures are classified within departments using 4-digit class codes which are also referred to accounts.

- **Examples:** Office supply purchases would go in account 3101 and Maintenance/Operational supplies would be classified as account 3120. Out of state airfare is 2801.

- A list of all account codes can be accessed by going to the following link: https://www.wisconsin.edu/financial-administration/account-codes/

A Note on UW System Account Organization (Funding Strings): (cont.)

- **Fund, Program Code, Department, and Account** make up the 4 main numbers every funding string should have. The 5th number is called a Project ID and this is mostly applied to grant accounts.

- **Project IDs** are 7-digit alphanumeric numbers consisting of three letters and 4 numbers.

- **An example would be AAH4567.** There is no specific meaning to the letters or numbers like there is for departments or funds, the next number in the sequence is assigned as project ID's are requested.

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Finding Departments Continued

- 1. Search by Department ID, Description, or Manager name
- 2. Expand, collapse or select
- 3. Department Options
  - Check All children
  - Locate in Tree
  - Remove
- 4. Select Funds by Group
- 5. Options for Fund selection
- 6. Run Query with parameters selected

Find Departments Identify department entities for financial detail

enter dept id or partial dept id/descr. or manager name   Search

36 - Staff
▶ ☐ 36-01 - Dean S&H
▶ ☐ 36-16 - Biology
▶ ☐ 36-17 - Biology Grants
▶ ☐ 36-18 - Microbiology
▶ ☐ 36-21 - Chemistry
▼ ☑ 36-25 - Computer Science
    ☐ 362500 - Computer Science
    ☐ 362501 - Micro Computer Laboratory
    ☐ 362502 - Computer Engineering Prog Fee
    ☐ 362503 - First Logic, Inc
    ☐ 362504 - Wing Project C-S Equipment
    ☐ 362505 - Credit by Exam-CS
    ☐ 362506 - Pronto Progress Contract
    ☐ 362507 - First Logic Contract
    ☐ 362508 - CS 101 Special Course Fee
    ☐ 362509 - Lab for Advanced Comp & Visual
    ☐ 362510 - FY20 Startup Wang
    ☐ 362511 - David Mathias IC
    ☐ 362512 - Computer Science Gifts
    ☐ 362513 - Graduate Research
    ☐ 362514 - FY15 CPIG Hursey
    ☐ 362515 - FY20 Fac Dev Forbes
    ☐ 362516 - Undergraduate Research
    ☐ 362517 - SIGCSE Foley/Hursey FY15-16
    ☐ 362518 - Fy20 Fac Res Mathias
    ☐ 362519 - Distinguished Lecturers
    ☐ 362520 - Chinese MSE
    ☐ 362521 - J Term Computer Science

Selected Departments 1 selected

36-25 - Computer Science

Funds check all | check GPRs check non-GPRs

☑ 102 ☐ 128 ☐ 131 ☐ 136 ☐ 144 ☐ 145 ☐ 233

→ Run Query

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Department Summary Report

- The summary report gives you a broad picture view of revenue and expenses among the account(s) that you selected.
- The very top of the report gives the description of the account group you are viewing and an option to export the report to excel or .pdf.
- In addition, the Pin to Dashboard option is available to create a tile for your dashboard. This is helpful if you find yourself needed to access a specific search repeatedly.
- Below the group description is a grey box where you can modify the search criteria within the account group by Fund, Period, Program, or Project.

Department Summary Report (cont.)

- For the Period selection you have one box that indicates length of time to view and a box to look at individual months.
  - **YTD – Is Year to date.** The start of the year is July 1st. For example, if October is selected, the period being viewed is July 1st-Sept 30th.
  - **ITD – Inception to date.** Looks back to previous fiscal years. Note of caution: Due to limitations in the departments strings, some department numbers have been recycled. So a sub-department may have changed it's purpose if you go back far enough. Sticking to YTD is preferred and should give you all the information you need to know.
  - **Period only** – Looks at a single month.
  - **Quarter only** – Looks at 3 month periods ending September, December, March, & June.

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Department Summary Report (cont.)

- Projects pulldown allows you to include, exclude, or search only project ID's. Hitting the 'All Projects' hyperlink allows you to select individual projects to view.

Department Summary Report (cont.)

- Below the search criteria, there is an option to view the summary in single year view or multi year view.
- Note that if you would like to look at the single year view of a previous fiscal year, you can do so by adjusting the fiscal year in the upper right hand corner next to your user ID.
- Under the year selector is the detail view slider. By moving it back and forth, you can indicate how much detail you would like to see.

Financials Summary   Single Year   Multi Year

Least Detail   ☐ Include Period 998   ⚙▾

Account	Budget	Oct	Actuals	Encumbrances	Balance
REVENUE					
Total Revenue & Sales Credits					
Revenue (Non Sales Credit)	$570,912.59	$0.00	$539,273.41	$0.00	$31,639.18

Department Summary Report (cont.)

- In single year view, you are able to see the following headings:
  - **Account:** Gives description of the revenue or expense line.
  - **Budget:** Indicates the budget for the group you are looking at.
  - **Month:** Gives you the expenses in the current month selected.
  - **Actual:** Gives the year to date totals.
  - **Encumbrances:** Indicates money that has not been spent but is reserved for a specific purchase. This is typically seen with salary or items purchased via a purchase order.
  - **Balance:** This is what is left after taking the budget total and subtracting actuals and encumbrances. Shows amount of funds that have not been spoken for.
- Clicking any of the blue links within the financial summary table will bring up the Department Detail view of that revenue or expense group.

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Department Detail Report

- The Detail Report will give you a detailed look at the revenue and expense items that make up a total from the summary view.

- A major difference between WISDM and WISER is that the detail view in WISDM brought up a new page whereas in WISER, the detail view initially splits the screen in half allowing you to look at the detail and summary pages at the same time. You can hit the 'Maximize' indicator on the blue Transaction Detail bar to expand the detail screen to take up the whole screen.

- Some columns in the detail screen will include hyperlinks where you can click on to dig down deeper and get more detail about a particular transaction.

- By hitting the gear cog pulldown in the upper right, you can export that data to Excel or as a PDF, customize the columns that you look at, and look at the records available per page.

Department Detail Report (Cont.)

- **Pro Tip:** Exporting the expense line items to excel allows you to more easily sort through expense detail than reviewing it within WISER.

- When you first look at the detail screen, it is suggested that you hit the blue gear cog and go to 'Customize…' This will allow you to choose the columns that you will need to use most often for your job.

- **Pro Tip:** With the new search capabilities in WISER, several of the fields you can search by will be the same fields you can choose from in the Column Customization screen.

- Example: If you have a payment on a purchase order, having the column 'PO Id' and 'PO Vendor Name' will give you the name of the vendor and PO number. If you wanted more detail on those transactions, you could use the information provided on the detail screen in a PO Search. Using the PO Id you can look at the detail of that particular Purchase order, using the PO Vendor name in the search would return results for every PO that we have with that vendor.

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Project Search

- Project Accounts are mostly reserved for internal and external grant projects.

- There are several options to pick when searching for a project. In a majority of the cases, you will use the 'Find Awards/Projects' screen or the 'My Projects' screen.

WISER ☰ Main Menu ▾ ⦂⦂⦂ Home

🏢 **Departments**
Find Departments

⚗ **Projects**
Find Awards/Projects
My Projects
My Awards
Award Modifications Search
WISPER Search
Sponsored AR Search

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Find Awards/Projects

- 'Find Awards/Projects' is a screen that allows you to search using various criteria.
- If you know the Project ID, that is the fastest way to get to the account you are looking for.
- Searching PI Name or by Dept ID would also narrow your search down to a manageable list to sort through. Note the gray button next to Dept ID. This will bring up a department tree similar to the department search tree.
- You can use this tree to select an account to view.

Find Awards/Projects

Find Awards/Projects (cont.)

- The results of a search will give you all of the accounts that met the search criteria.
- To access the Project Summary view of a project, select the blue hyperlink in the 'Fund & Proj' column.
- Selecting the hyperlink in the 'Dept' column will bring you to a search that shows all awards assigned to that department.
- Similarly, clicking the link of the PI in the 'Investigator(s)' column will bring you results for every project ID, that PI
- If you click the box in the 'In My Projects' column, the project will be saved in your 'My Projects' page where you can quickly navigate between your projects.

My Projects

- The My Projects screen is a list of projects that you have favorited.
- There are multiple sections that are split by Fund.
- You can reorganize your list by hovering over a project line. On the left hand column, you are given an up arrow, down arrow, or X which allows you to change the project order or remove a project from your list of favorites.
- You can also clear your entire list by selecting the 'remove all from My Projects' button.

Project Summary View

- The Project Summary View is similar to the Department Summary View.
- Project information is displayed at the top.
- The Project Summary view gives a few more tabs of information (e.g. 'Financials', 'Personnel', and 'Funding Actions' tabs). The two tabs that will be mostly used are 'Financials' and 'Documents'
- The Documents tab will generally contain important documents that are received by Business Services throughout the life of the project including, ORSP Approval Documents, Budget Submissions, Grant Award Notifications, and Grant Extension notifications.

Project Summary View (cont.)

- An important item to note is that with projects, the Period Search function 'ITD thru' is very significantly more helpful in the Project Summary view than in the Department view. ITD or Inception to Date gives you all of the financial transactions that have occurred since the account was set up.