WISDM is NOT Going Away Yet!

- WISDM and WISER will both be active and run parallel
- There is no definitive date for the retirement of WISDM
- We will be monitoring opinions and usage to determine when WISDM will be fully phased out
What is WISER?

• WISER is the next evolution of WISDM

• If you have access to WISDM, you will automatically have equivalent access to available functionality in WISER

• Department Search, Transaction Search, and Payroll Reports will be live by 8:00 AM on December 12th

• WISER, like WISDM, contains financial and demographic data from SFS, HRS and certain legacy transactions – in other words, the source of the data has not changed
Timeline

Upcoming Features and rollout estimates:

December 2017
• Department, Payroll, and Transaction Search go live

February 2018
• AP/PO Search go live

April 2018
• Project Search go live

To be Announced...
• Tuition Remission
• Budget Control Reports
• Query Tool
WISDM vs WISER

WISER offers a toned down, sleek, more user friendly interface for reporting and transactional data searches.
Getting to WISER

You can use the navigation from the WISDM main menu, or you can go directly to https://wiser.wisc.edu/#

There is no link to WISER Transaction search in WISDM
• Only the layout differs, all search and reporting options will be retained, although some modules are not yet rolled out

• *Department Search* and *Department Rollup* have been combined under *Find Departments*

• *Journal Search* and *Transaction Search* are combined under *Find Detailed Transactions*

• *Salary/Fringe Search* and *Encumbrance Search* are combined under *Find Salaries & Encumbrances*
WISER gives users the ability to add tiles to the home screen and create tabs to group tiles for quick and easy saved searches requiring fewer clicks to navigate.
To add a tile to your home screen, run the query you want to pin, then find the “Pin to Dashboard” link in the upper right hand corner of the results.

- The pop up box to the right will appear
- Enter a description for the tile
- You can also define a new group, or add it to the default group

Select [New Group] from the drop down

Then choose a name for the new tab

Once your tab is created, you will see it at the top of the home screen.
Some tiles can provide summary information upon sign in:
- Department Search Tiles can show 3 levels of detail
- Adjust the detail level by hovering over the tile and clicking on the up and down arrows
- The half tile shown at right, will switch between YTD Expense and Current Month Expense
- The quarter tile size shows no detail

- The full size tile contains additional details which do no alternate
- The information on the tile is not configurable at this time
- Tiles only retain the department and fund selection
- You cannot link to a multi-year department search

A tile linked to a single expense report can display detail

Transaction Search tiles will show the funding string, but no detail

- Expense Report Breakdown and Payroll Data tiles don’t show detail on the homepage
WISER now allows users to filter funds by GPR and Non-GPR funding

- Choose GPR, non-GPR, or all
- This selection will be retained when pinned to the home screen
- As previously mentioned, Department Search and Department Rollup are combined into a single search
What’s New?

- Streamlined look and feel
- Multi-year searches display up to five years of expenses
- Expense Categories: Financials Summary, Personnel, Purchasing, and Expense Reports
- Improved drill down functionality uses a slider to adjust the transaction detail level
- Scope Up feature allows users to jump up one level or straight to the Division level when they select the Department Tree
WISER includes Multi Year reporting capabilities for Department Searches.
WISER Department Search

WISER provides quick access to detail behind departmental personnel, purchasing, and Expense Reports

### Personnel

<table>
<thead>
<tr>
<th>Name</th>
<th>Empl ID</th>
<th>Original Encumb.</th>
<th>Paid</th>
<th>Encumb. Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>$0.00</td>
<td>$2,200.00</td>
<td>-2,200.00</td>
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<tr>
<td></td>
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<td>$0.00</td>
<td>$2,672.50</td>
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<td>$3,594.00</td>
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<td>$0.00</td>
<td>$3,049.36</td>
<td>-3,049.36</td>
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<tr>
<td></td>
<td>$60,519.20</td>
<td>$11,706.42</td>
<td>$48,812.78</td>
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<tr>
<td></td>
<td>$64,344.00</td>
<td>$16,220.00</td>
<td>$66,124.00</td>
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</table>

### Purchasing

<table>
<thead>
<tr>
<th>PO ID</th>
<th>PO Date</th>
<th>Vendor</th>
<th>Status</th>
<th>PO Amount</th>
<th>Paid</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>BB33283001</td>
<td>07/02/2016</td>
<td>RICOH USA INC</td>
<td>Dispatched</td>
<td>$1,500.00</td>
<td>$235.73</td>
<td>$1,264.27</td>
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<tr>
<td>732K933001</td>
<td>04/03/2017</td>
<td>THIеллЕНS</td>
<td>Dispatched</td>
<td>$1.00</td>
<td>$28,107.00</td>
<td>$28,106.00</td>
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</table>

### Expense Reports

<table>
<thead>
<tr>
<th>Report ID</th>
<th>Employee</th>
<th>Title</th>
<th>Travel Dates</th>
<th>Business Purpose</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>0000407993</td>
<td></td>
<td>UWSA Fall Travel Meeting</td>
<td>11/08/2016 6:00 AM - 11/16/2016 6:00 PM</td>
<td>Business</td>
<td>$19.17</td>
</tr>
</tbody>
</table>
The scope up option allows you to jump up to the next department level.

From this ...

030501 ACCOUNTING SVCS*ACCTG

To this ...

0305 ACCOUNTING SERVICES

To this ...

03 BUSINESS SERVICES

And even this!

ALL_MSN_DEPTIDS ALL OF UWMSN DEPARTMENT IDS
WISDM’s Salary/Fringe and Encumbrance Searches are combined in WISER’s Find Salaries & Encumbrances Search

- Legacy Appt ID is no longer a search option
- SFD Transaction Search no longer separate
- Addition of more fields
**WISER Payroll Search**

- WISDM provided only PMT Total
- WISER, in addition, provides beginning and ending encumbrance dates, Fiscal Year, Original Encumbrance, Liquidated Amount and remaining Encumbrance Balance.

### Find Payroll Data Search Results

<table>
<thead>
<tr>
<th>Empl ID/Rec. No</th>
<th>Job Title</th>
<th>Empl Name</th>
<th>Fund</th>
<th>Dept</th>
<th>Project</th>
<th>Program</th>
<th>Account</th>
<th>Total Paid</th>
<th>Begin</th>
<th>End</th>
<th>Pay Year</th>
<th>Orig. Encumb.</th>
<th>Liquidated Amt</th>
<th>Encumb. Balance</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>1521: Group Heath - ER</td>
<td>$2,262.04</td>
<td>2018</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>1510: Medicare - ER</td>
<td>$212.40</td>
<td>2018</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td></td>
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</tr>
<tr>
<td>1</td>
<td>1519: Social Security - ER</td>
<td>$968.21</td>
<td>2018</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td></td>
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</tr>
<tr>
<td>1</td>
<td>1531: Univ Staff - Hourly</td>
<td>$15,134.00</td>
<td>09/29/2017</td>
<td>09/30/2017</td>
<td>2018</td>
<td>$78,707.20</td>
<td>$15,134.00</td>
<td>$63,571.20</td>
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<td>1</td>
<td>1542: Univ Staff - Retirement</td>
<td>$1,717.90</td>
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<td>1543: Univ Staff - Income Continuation</td>
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<tr>
<td>1</td>
<td>1510: Medicare - ER</td>
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<td>$0.00</td>
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<tr>
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<td>1519: Social Security - ER</td>
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</tr>
</tbody>
</table>
To get to Payroll Journal Detail from your payroll search, click on any of the blue numbers which will open Transaction Detail at the bottom of the page. Then click on the Journal ID which takes you to the Journal page. Note that attachments will now be located in the new Attachments section.
• The search screen has been simplified by storing some of the lesser used search functions in a More Options section
Pick Custom Columns has changed names and has different navigation.
Additional Training Options

WISER training has replaced WISDM training beginning January 2018
• Departments can request a training for their area as needed
• A new WISER section is being built on the Accounting Services website with materials, information, and links to outside resources
• Additional information will be added to the site as available

Call or e-mail us if you have any questions or comments!

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