

How to Use WISDM to Print out Monthly Reports

There are two types of monthly reports: Project reports and fund-department reports.

How to Print a List of Monthly Project Reports

There are two steps involve in this. First is to create a list of projects by using My Projects feature. Once the list is created, you don't need to recreate them every month unless you have new projects to add to or old projects to delete from your list. Second step is to go to your "My Projects" and print out the reports.

Step 1: To Add A Project to "My Projects"

From project search screen (navigation: Projects -> Project Search), enter the project fund code and your department ID (division code, department code or sub-department code) and click "Submit". A list of projects for the project fund and your department will be listed at the bottom of the screen.

SEARCH CRITERIA

Fund

Project ID

Award ID

Department ID

Department Name

PI* or Co-PI Name

Sponsor Name

Reference Award Nbr

Project Description

Project Status

Project Fund Balance \$

Project End Date

Balance Type: <input type="text" value="Budget"/>		Financials as of: <input type="text" value="OCT - 2008"/>							
Fund & Proj	Award ID	Description	Sponsor Name	Ref Award Nbr	Dept	PI* and Co-PIs	Start Dt	End Dt	Status
144 144K1MCR	MSN105379	ENEDIYNE ANTITUMOR ANTIBIOTIC	DHHS, PHS, NATIONAL INSTITUTES OF	5 K02 AI051689- 02	561000 PHARMACY/PHARMACY	Shen, Ben*	9/1/2001	2/28/2007	1-Open

Scroll down and select the project by clicking on the project ID on the left. This will bring you to the project summary screen.

Proj	PROJECT ID	PROJECT NAME	SPONSOR NAME	SPONSOR PROJ	PI	PI TITLE	START DATE	END DATE	ST	
144 144KN58	MSN105379	ENEDIYNE ANTITUMOR ANTIBIOTIC	DHHS, PHS, NATIONAL INSTITUTES OF HEALTH	5 K02 AI051689-05	561000	PHARMACY*PHARMACY	Shen, Ben*	9/1/2001	2/28/2007	1-4
144 144KU68	MSN100147	SEA GRANT FY2002	COMM. NATIONAL OCEANIC & ATMOSPHERIC ADM	NA16RG2257	561000	PHARMACY*PHARMACY	Andren, Anders* Heideman, Warren*	3/1/2002	2/28/2003	1-4
144 144KU69	MSN100147	SEA GRANT FY2002	COMM. NATIONAL OCEANIC & ATMOSPHERIC ADM	NA16RG2257	561000	PHARMACY*PHARMACY	Andren, Anders* Peterson, Richard*	3/1/2002	5/31/2007	1-4
144 144KW39	MSN103118	TRANSCRIPTIONAL CONTROL OF ANT	DHHS, PHS, NATIONAL INSTITUTES OF HEALTH	5 R01 ES008089-10	561000	PHARMACY*PHARMACY	Johnson, Jeffrey*	2/1/2002	11/30/2007	1-4
144 144LB73	MSN105293	IN VITRO GLYCORANDOMIZATION OF	DHHS, PHS, NATIONAL INSTITUTES OF HEALTH	5 R01 AI052218-05	561000	PHARMACY*PHARMACY	Thorsen, Jon*	6/3/2002	5/31/2007	1-4
144 144LF30	MSN106416	PRESSURE EFFECTS ON THE KINETI	NATIONAL SCIENCE FOUNDATION	MCB-0211290	561000	PHARMACY*PHARMACY	Cnv001.*	8/1/2002	7/31/2008	1-4
144 144LN59	MSN103092	BIOSYNTHESIS OF HYBRID PEPTIDE	DHHS, PHS, NATIONAL INSTITUTES OF HEALTH	5 R01 CA094426-10	561000	PHARMACY*PHARMACY	Shen, Ben*	1/1/2003	12/31/2008	1-4
144 144LQ81	MSN100147	SEA GRANT FY 2003	COMM. NATIONAL OCEANIC & ATMOSPHERIC ADM	NA16RG2257	561000	PHARMACY*PHARMACY	Andren, Anders* Heideman, Warren*	3/1/2003	2/28/2007	1-4

Once you get to the project summary screen below, click on “Add to My Projects” link on the upper left corner of the screen. The project will be added to My Projects. Go back to the previous project list screen and continue selecting the projects until you are done.

[Add to My Projects](#)

Fund-Project: **144.144KN58** Project Description: **ENEDIYNE ANTITUMOR ANTIBIOTIC SYNTHESIS-STREPTOMYCES** View as:

UW Project Type: **Research Career Award** Project PI: **[Shen, Ben:](#)**

Project Budget: **\$534,600.00** Project Co-PI:

Project Dates: **9/1/2001 - 2/28/2007** Project Status: **Open**

F&A Base (Rate): **TDC (8%)** Project Department: **561000: PHARMACY*PHARMACY**

▶ Award ID: **[MSN105379](#)** Award Sponsor: **DHHS, PHS, NATIONAL INSTITUTES OF HEALTH**

Financials | Personnel | Funding Actions | Requirements | Edits | Cost Share Schedule | Cost Share Expenditures | Associated Docs | WISPER

To access project summary from before July 2006 click [here](#)

Balance Type: Period: thru

Account Tree: Summary Level: Program:

Account	Budget	MTD	Actuals	Encumbrances	Balance
EXPENSES					
Expenses					
-- Direct Expenses					
---- Salaries	0.00	0.00	372,129.26	0.00	-372,129.26
---- Fringe Benefits	0.00	0.00	122,778.94	0.00	-122,778.94
---- Other Expenditures	0.00	0.00	0.00	0.00	0.00
---- [ZDIRECT] All Direct Costs Projbud	495,000.00	0.00	0.00	0.00	495,000.00
---- [ZLUMP] Lump Sum Budgets-prjbud	0.00	0.00	0.00	0.00	0.00
SUBTOTAL DIRECT AVAILABLE BALANCE	495,000.00	0.00	494,908.20	0.00	91.80
Indirect Costs					
-- F&A	39,600.00	0.00	39,691.80	0.00	-91.80
TOTAL INCLUDING F&A	534,600.00	0.00	534,600.00	0.00	0.00

Step 2: Print Project Reports from "My Projects"

Go to My Projects (navigation: Projects -> My Projects) screen. You will see the list of projects you have created from Step 1 above. Select the reporting month as you wish and click on the project ID. This will bring you to the financial summary page.

Balance Type: Budget		Financials as of: OCT - 2008									
Fund & Proj	Award ID	Description	Sponsor Name	Ref Award Nbr	Dept	PI* and Co-PIs	Start Dt	End Dt	Status	MTD Exp	Budget
144 144LQ81	MSN100147	SEA GRANT FY 2003	COMM, NATIONAL OCEANIC & ATMOSPHERIC ADM	NA16RG2257	561000: PHARMACY*PHARMACY	Andren Anders* Heideman Warren*	3/1/2003	2/28/2007	1-Open	0.00	220,958.38
144 144KU68	MSN100147	SEA GRANT FY 2002	COMM, NATIONAL OCEANIC & ATMOSPHERIC ADM	NA16RG2257	561000: PHARMACY*PHARMACY	Andren Anders* Heideman Warren*	3/1/2002	2/28/2003	1-Open	0.00	22,047.34
144 144KN58	MSN105379	ENEDIYNE ANTITUMOR ANTIBIOTIC	DHHS, PHS, NATIONAL INSTITUTES OF HEALTH	5 K02 AI051689-05	561000: PHARMACY*PHARMACY	Shen Ben*	9/1/2001	2/28/2007	1-Open	0.00	534,600.00
144 144QT11	MSN106347	EFFECTIVE OUTREACH FOR A NEW W	UNIVERSITY OF MINNESOTA	Q4089053123	076100: ENVIR RSRCs CTR*ENV RES CT	Lezberg Sharon*	9/1/2007	8/31/2009	1-Open	156.55	129,997.00
144 144QE67	MSN103183	THE NANO-MECHANICAL COMPUTER	DOD, DEFENSE ADVANCED RESEARCH PROJECTS	N66001-07-1-2046	192500: ELEC & COM ENGR*ELEC&COMP	Blick Robert*	6/27/2007	6/26/2009	1-Open	558.74	267,336.00
144		FULBRIGHT-BAVE	US DEPARTMENT		104000:						

From the financial summary page, do File and Print. The report will be printed out. If you want to print out more reports, go back to My Project screen and select another project ID to print. Continue the process until you are done.

Account	Budget	MTD	Actuals	Encumbrances	Balance
EXPENSES					
Expenses					
-- Direct Expenses					
---- Salaries	0.00	0.00	65,056.49	0.00	-65,056.49
---- Fringe Benefits	0.00	0.00	12,962.30	0.00	-12,962.30
---- Supplies	0.00	0.00	56,179.87	0.00	-56,179.87
---- Domestic Travel	0.00	0.00	8,559.05	0.00	-8,559.05
---- Tuition and Fees	0.00	0.00	5,300.60	0.00	-5,300.60
---- Other Expenditures	0.00	0.00	5,460.76	0.00	-5,460.76
---- [ZDIRECT] All Direct Costs Projbud	152,670.84	0.00	0.00	0.00	152,670.84
---- [ZLUMP] Lump Sum Budgets-pjrbud	0.00	0.00	0.00	0.00	0.00
SUBTOTAL DIRECT AVAILABLE BALANCE	152,670.84	0.00	153,519.07	0.00	-848.23
Indirect Costs					
-- F&A	68,287.54	0.00	67,439.31	0.00	848.23
TOTAL INCLUDING F&A	220,958.38	0.00	220,958.38	0.00	0.00

How to Print out a List of Monthly Fund-Department Reports

There are two steps involve in this. First is to create a list of fund-department list by using My Favorite feature. Once the list is created, you don't need to recreate them every month unless you have new ones to add to your list. Second step is to go to your "My Projects" and print out the reports.

Step 1: Create a List of Fund-Department Reports in My Favorite

From WISDM main menu, do Departments -> Search. Enter fund and department and click Submit. When you are at the summary screen (shown below), click on "Add to Favorites".

UNIVERSITY OF WISCONSIN SYSTEM WISDM
Wisconsin Data Mart for PeopleSoft Financials

SUMMARY REPORT

Main Menu Comment Test **Add to Favorites** UV/MSN - 2009

[View GPR Report](#)
[View Program Revenue - Standard Report](#)
[View Program Revenue - Financial Report](#)
[View Project/Grant Report](#)

REPORT OPTIONS:

Project Option: Only Department
 Time Period: YTD through 5 (NOV) [Advanced](#)
 Account Tree: MSN_GPR_DFLT (DEFAULT)
 Drilldown Level: (3)_MAJOR_CATEGORY_SUMMARY (DEFAULT)
 Program: All
 View: Figures

FUND(S):
101

DEPARTMENT(S):
030500 ACCOUNTING SVCS*ACCTG SVCS
 Excluding Projects
[Rollup](#)

Account	Budget	MTD	Expenses	Encumbrances	Balance	% Budget Used
EXPENSES						
Expenses						
-- All Salaries	2,119,849.00	0.00	746,264.11	0.00	1,373,584.89	35
-- Services & Supplies	1,704.00	0.00	35,450.61	6,302.12	-40,048.73	2450
TOTAL	2,121,553.00	0.00	781,714.72	6,302.12	1,333,536.16	37

In the next screen below, type in a report name in the Name field and click on "Save". You can repeat the process until you have added all your fund-department reports.

Save Favorite As

Save in: [Home]
My Departments
My Project List

Name:

Description:

Step 2: Print out Fund-Department Reports from My Favorite

From WISDM main menu, go to "My Favorites". The reports you created will be listed there. Click on the reports to bring up the report page. You can select the month you want to print. Then do File -> Print.

MAIN MENU

rt for PeopleSoft Financials

nt Test Help UWMSN 2009

MY FAVORITES [User: hjramer]

Location: [Home] Up New Folder Move Copy Share Delete

<input type="checkbox"/>	Name	Description
<input type="checkbox"/>	My Departments	[Folder]
<input type="checkbox"/>	My Project List	[Folder]
<input type="checkbox"/>	101-030500	
<input type="checkbox"/>	All Funds 030500	

Click on the report you want to print.

Change/Select the month, and then do File -> Print from the browser menu.

[View Program Revenue - Standard Report](#)
[View Program Revenue - Financial Report](#)
[View Project/Grant Report](#)

REPORT OPTIONS:				FUND(S):	
Project Option:	Only Department			101	
Time Period:	YTD through	5 (NOV)	Advanced	DEPARTMENT(S):	
Account Tree:	MSN_GPR_DFL	1 (JUL)		030500 ACCOUNTING SVCS*ACCTG SVCS	
Drilldown Level:	(3)_MAJOR_CAT	2 (AUG)		Excluding Projects	
Program:	All	3 (SEP)		Rollup	
View:	Figures	4 (OCT)			
		5 (NOV)			
		6 (DEC)			
		7 (JAN)			
		8 (FEB)			
		9 (MAR)			
		10 (APR)			
		11 (MAY)			
		12 (JUN)			
		13 (CLOSE)			

Account	Bu	Expenses	Encumbrances	Balance	% Budget Used
EXPENSES					
Expenses					
-- All Salaries	2,119,849.00	0.00	746,264.11	0.00	1,373,584.89
-- Services & Supplies	1,704.00	0.00	35,450.61	6,302.12	-40,048.73
TOTAL	2,121,553.00	0.00	781,714.72	6,302.12	1,333,536.16