Highlights of WISER Projects for Grants Management

- Access WISER
  - Through WISDM (WISER Projects menu option)
  - https://www.rsp.wisc.edu/, Electronic Tools list on the right side of the page
  - Directly: https://wiser.wisc.edu/
- Overall Software Changes
  - Ability to create home screen groups and pin menu options (Find Awards/Projects, AR Search, etc.)
  - Individual searches with criteria can be pinned for recurring runs
  - Quick Search (search for project id, name of PI, etc.)
- My Projects/My Awards
  - My Projects Expanded to also include My Awards
  - Options added to "Add All" to My Projects/My Awards
  - Filter option at Fund, Sponsor, Dept, Investigator, Status
- Award Level Financials
  - Financial Data can be viewed as a summary for an award (multiple projects) as well as by project
  - Details are drillable at both levels (award level and project level)
  - The Period dropdown for awards can be changed on both the start and end period of interest
  - Project Inclusion: Award view offers selection of projects to be included in summary (can choose specific projects to include/exclude from review)
  - Period Summary under Award level view allows drillable breakdown by month of budget changes, direct expenses, F&A expenses and cost share expenses. AR information is also included, but is not drillable.
- Accounts Receivable
  - Accounts Receivable (AR) data can be viewed for any award through the new AR tab
  - Data can be filtered to include only Open AR, only Closed AR, or to include both statuses
  - All columns are clickable to sort by any headings
- Documents
  - Award Documents after mid November 2018 are available through a link to Perceptive Experience
  - Older Award documents will remain only as attachments in WISER
- Project Level View
  - Account codes that are not included in the F&A calculation are highlighted in yellow (use highest level detail)
  - Calculator function allows selection of transactions for sum, count and average calculations on page
  - Transaction counts available from project view
- Accounts Receivable Search (replaces WISDM Grants Payment Activity Search)
  - Includes all accounts receivable, not just paid AR
  - Search includes more criteria (AR status is open and/ or closed, accountant name, department ID, etc.)
  - Results can be sorted by any column heading
- Transaction Detail
  - Use customize columns to look for data, data structure is different than WISDM
  - Application Connections on transaction detail lines from 🔍 (Cost Transfer Tool & Expense Report)
- Cost Share under Award level as well as Project level (WISDM only has this under the project level)
- Calculator Feature at Project Level and on the AR tab at the Award Level
- Searches include Type assist for PI/Co-Inv and Sponsor criteria
- Future – Users may see changes as requests are reviewed and prioritized