

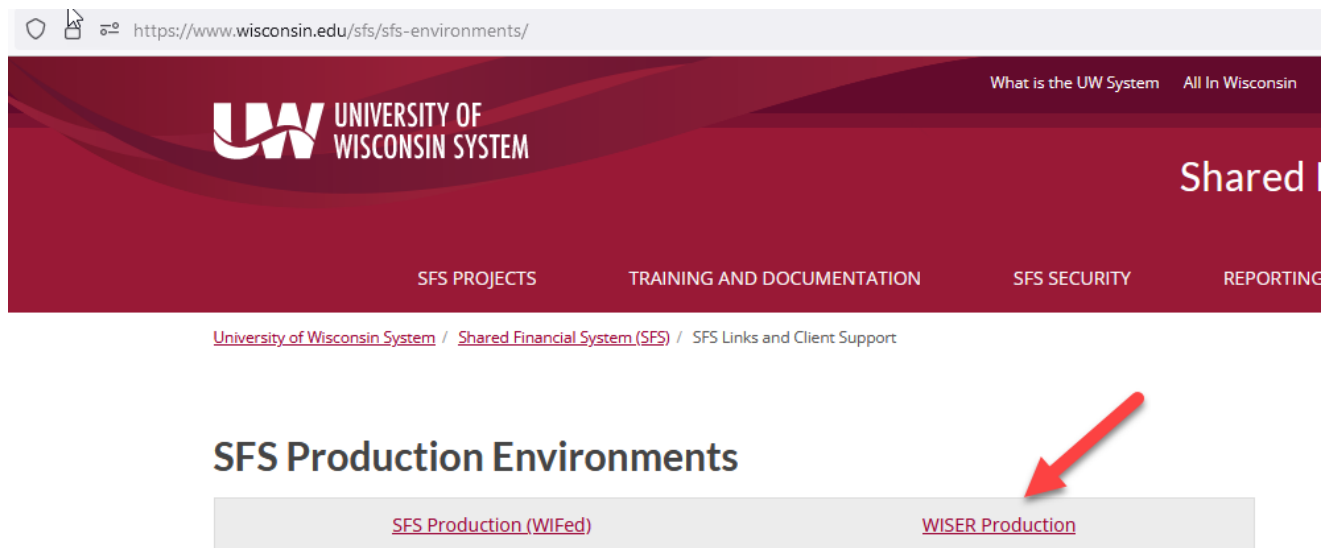
How To Look up Travel Expenses in WISER

WISER Expense Reporting Phase 1

WISER is a reporting tool that is designed to modify and modernize your current data warehousing, retrieval and reporting requirements. In the future, you will see WISDM reporting options migrate over to the WISER application.

WISER displays only fully approved and paid expense reports submitted through e- Reimbursement and includes personal, My Corporate Card and University Prepaid payment types. Prepaid items will display in WISER only if the items were entered into the expense report.

WISER Access Procedure

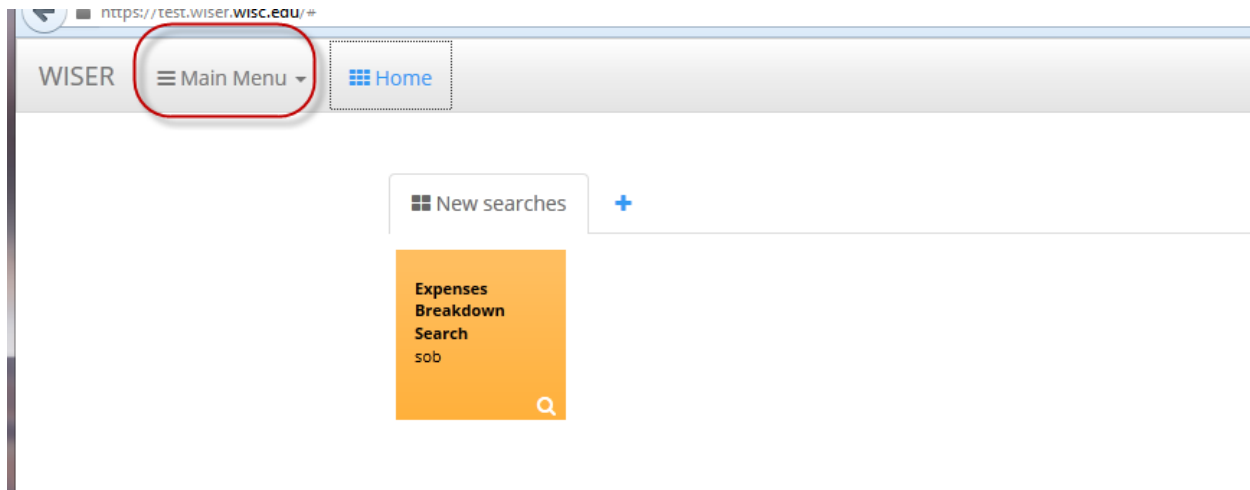


The screenshot shows a web browser window with the URL <https://www.wisconsin.edu/sfs/sfs-environments/>. The page header includes the University of Wisconsin System logo and navigation links for "What is the UW System" and "All In Wisconsin". The main navigation bar contains "SFS PROJECTS", "TRAINING AND DOCUMENTATION", "SFS SECURITY", and "REPORTING". Below the navigation bar, the breadcrumb trail reads "University of Wisconsin System / Shared Financial System (SFS) / SFS Links and Client Support". The main content area is titled "SFS Production Environments" and contains two links: "SFS Production (WIFed)" and "WISER Production". A red arrow points to the "WISER Production" link.

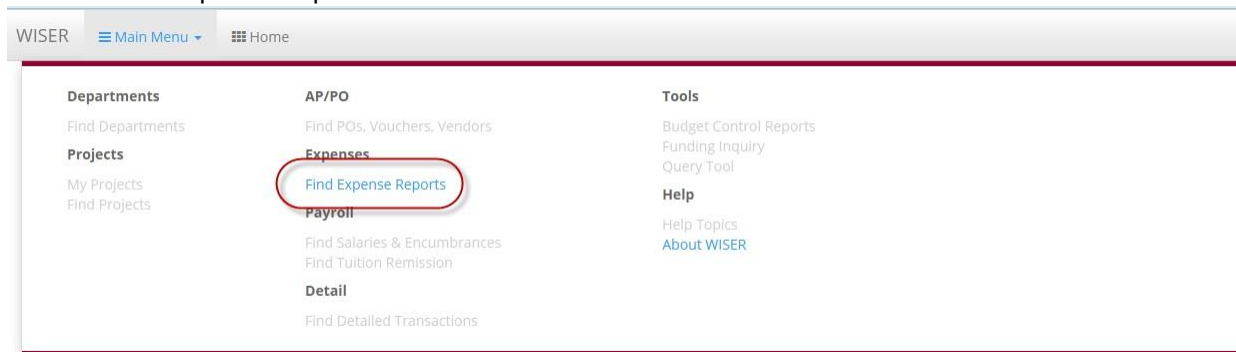
This action will bring you to the WISER application.

How To Look up Travel Expenses in WISER

To start a new search – select Main Menu



Select – Find Expense Reports



How To Look up Travel Expenses in WISER

There are 2 options in the Find Expense Reports Option - **Expenses Breakdown** or **Find a Report**

WISER Main Menu Home

Find Expenses Discover expenses data from e-Reimbursement.

Choose a search below.

Expenses Breakdown

Explore e-Reimbursement data by department, person, and/or project to get totals by department and expense type analysis.

[Pin to Dashboard](#)

Find a Report

Find a single expense report by its Sheet ID or GET ID. View detail on the report such as comments, travel dates, traveler, expense lines, and accounting.

[Pin to Dashboard](#)

Expenses Breakdown brings you to a search page where you can select your criteria. Search by:

- Employee – Retrieves all reports submitted by an individual.
- Department – Ability to search on Business Unit, Division, Department or Sub-Department. An icon is available to help with this search.
- Project – Retrieves all expenses relating to a particular project.
- Dates – Defaults to current fiscal year, but provides the option to select any desired date range.

How To Look up Travel Expenses in WISER

Expenses Breakdown Discover expenses data from e-Reimbursemen

The diagram shows a search form with the following fields and callouts:

- Employee:** A text input field with the placeholder "start typing last name". A blue arrow points to this field.
- Department:** A text input field with the placeholder "e.g. 062020" and a tree icon. A red-bordered callout box says: "Use icon to search BU Tree for Division or department".
- Project:** A text input field with the placeholder "e.g. PRJ21AB".
- Dates:** Two date input fields. The first has "07/02/2013" and the second has "06/30/2014" with a gear icon. A red-bordered callout box says: "Defaults to current Fiscal Year but can be changed to any date range".
- Search:** A blue button labeled "Search".

The screenshot shows the WISER interface with the search form. A dropdown menu is open for the Department field, titled "Pick a Department". The dropdown contains the following options:

- ALL - All Organizations
- + PRESIDENT - Total President
- + EXEC VICE PRESIDENT - SVP for Admin & Fiscal Affairs
- + ACADEMIC AFFAIRS - Total Academic Affairs
- + BOARD OF REGENTS - Total Board of Regents Office
- + FINANCE - Total Finance
- + SW CLEARING - Total SW Clearing Accounts
- + UNITWIDE ADMIN - Total Unitwide Admin
- + UNITWIDE - Total Unitwide

A "Cancel" button is located at the bottom right of the dropdown menu.

How To Look up Travel Expenses in WISER

Expenses Breakdown Discover exp

Employee Q
start typing last name

Department
e.g. 062020 ⌵

Project
e.g. PRJ21AB

Dates
07/02/2013 06/30/2014 ⌵

- Last 30 days
- Last month
- This Fiscal Year
- Last Fiscal Year
- Clear

Or select dates

Data will be returned depending on your search criteria.

The data can be exported to Excel or pinned to your WISER homepage dashboard. If a search is pinned to your dashboard, the search will reside on your WISER 'Home' page. The pinned search results will be updated each time the search is opened in your WISER homepage. Pinning preferred searches is one of the advantages you will see in WISER. The Pin option enables you, the user, to easily pin your expense reimbursement searches to the WISER home page dashboard for easy access and up to date results.

How To Look up Travel Expenses in WISER

WISER Scoping Technique

By using the 'Scoping' icon you can drill down into more detail.

Expenses Breakdown Search Results

[Export to Excel](#)
[Pin to Dashboard](#)

Department 03 - BUSINESS SERVICES	Total Reports 73	Total Amount \$57,505.81
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Departments

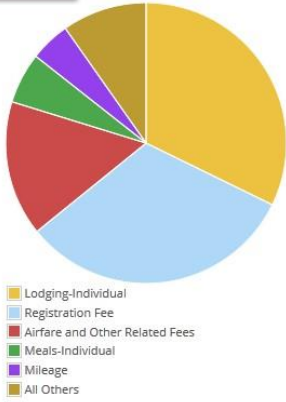
Department	Total Reports	Total Amount	%	
0301 ADMINISTRATION	1	\$793.15	1.38%	
0305 ACCOUNTING SERVICES	24	\$19,493.69	33.9%	
0306 PERSONNEL	1	\$8,940.47	15.55%	
0335 INTERNAL AUDIT	6	\$10,299.36	17.91%	

Use scoping to get to further detail

Under 'Expense Type' you can sort by Expense Type or Amount.

Sort by Expense Type

Expense Type	Amount	%
Air-Baggage Fees	\$752.00	1.31%
Air-Travel Agency Service Fee	\$43.50	0.08%
Airfare and Other Related Fees	\$8,965.95	15.59%
Gasoline	\$10.12	0.02%
Internet Fee	\$10.95	0.02%
Lodging-Individual	\$18,534.90	32.23%
Meals-Hosted	\$85.37	0.15%
Meals-Individual	\$3,370.03	5.86%
Meals-NoOvernight Stay	\$24.00	0.04%
Mileage	\$2,658.04	4.62%
Misc-Purchases/Supplies	\$689.15	1.2%
Parking	\$1,063.75	1.85%
Registration Fee	\$18,364.00	31.93%
Relocation-Stipend	\$1,000.00	1.74%
Taxi/Subway/City Bus, etc.	\$961.18	1.67%
Train/Bus/Other Long Distance	\$104.00	0.18%
Travel Incidentals	\$226.90	0.39%
Vehicle Rental	\$641.97	1.12%
Total	\$57,505.81	



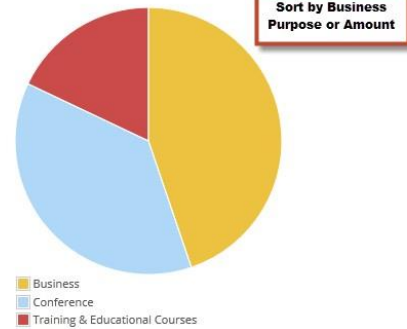
- Lodging-Individual
- Registration Fee
- Airfare and Other Related Fees
- Meals-Individual
- Mileage
- All Others

How To Look up Travel Expenses in WISER

Under 'Business Purposes' you can sort by Business Purpose or Amount.
By selecting a Report ID, you can drill into a particular report.

Business Purposes

Business Purpose	Amount	%
Business	\$14,622.74	44.79%
Conference	\$12,160.28	37.25%
Training & Educational Courses	\$5,865.19	17.96%
Total	\$32,648.21	



Reports 86 found.

Drill into an individual Expense Report

By selecting the check mark you can drill into additional detail for any expense line

Expense Lines

	Expense Type	Date	Amount	Billing Type	Payment Method	Description
<input checked="" type="checkbox"/>	Airfare and Other Related Fees	01/31/2013	\$474.80	Out-of-State	University Prepaid	Depart MSN on 2/23 @ 10:56 AM Return MSN on 3/1 @ 12:22 PM
<input checked="" type="checkbox"/>	Registration Fee	12/11/2013	\$1,000.00	Out-of-State	University Prepaid	1) NextLevel Conference Registration; \$650.00 2) Course fee; \$350.00
<input checked="" type="checkbox"/>	Lodging-Individual	02/26/2014	\$469.98	Out-of-State	University Prepaid	room = \$209.00 each night tax = \$27.17 each night
<input checked="" type="checkbox"/>	Air-Baggage Fees	02/23/2014	\$25.00	Out-of-State	Personal Funds	One bag to Orlando.
<input checked="" type="checkbox"/>	Air-Baggage Fees	02/28/2014	\$25.00	Out-of-State	Personal Funds	One bag on return trip.
<input checked="" type="checkbox"/>	Meals-Individual	02/23/2014	\$8.48	Out-of-State	Personal Funds	lunch
<input checked="" type="checkbox"/>	Meals-Individual	02/24/2014	\$25.00	Out-of-State	Personal Funds	Dinner; Receipt total went over allowed amount for reimbursement.
<input checked="" type="checkbox"/>	Meals-Individual	02/25/2014	\$25.00	Out-of-State	Personal Funds	Dinner; Receipt total went over allowed amount for reimbursement.
<input checked="" type="checkbox"/>	Travel Incidentals	02/26/2014	\$8.00	Out-of-State	Personal Funds	Hotel tips: 6 Porter tips: \$1 per bag x 2 (departure and arrival days) = \$2 \$2 per day x 3 days = \$
	Total		\$2,061.26			
	To Employee		\$116.48			

How To Look up Travel Expenses in WISER

Expense Line 1 Detail

Expense Type Airfare and Other Related Fees
Date 01/31/2013
Amount \$474.80
Billing Type Out-of-State
Payment Method University Prepaid
Description Depart MSN on 2/23 @ 10:56 AM Return MSN on 3/1 @ 12:22 PM
Non-reimbursable No
Approved Yes
Location N/A
Merchant DELTA
Airfare Receipt Nbr 0067343881507
Number of Nights N/A
Number of Passengers N/A
Travel From N/A
Transport Type N/A
Distance N/A

Close

If attachments have been added to a report, you can drill in and view these attachments.

Attachments

The Accounting Summary and Funding Strings used in each report are detailed.

Accounting Summary

Account	Department	Fund	Program	Project	Class	Amount
2860: Meals - In State	075291	136	5	-	-	\$56.00
2870: Incidentals - In State	075291	136	5	-	-	\$15.00

Funding Strings

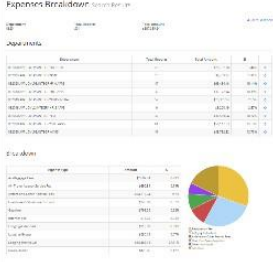
Department	Fund	Program	Project	Class	Amount
075291	136	5	-	-	\$71.00

Returning to the Main Menu - Select "Find a Report" to search for an individual expense report.

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Find Expenses Discover expenses data from e-Reimbursement.

Choose a search below.

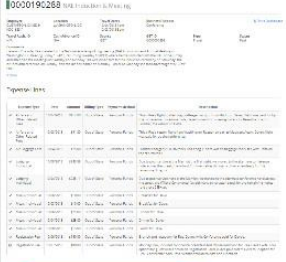


Expenses Breakdown

Explore e-Reimbursement data by department, person, and/or project to get totals by department and expense type analysis.

[Pin to Dashboard](#)

The screenshot shows a table with columns for Department, Balance, and Budget. Below the table is a pie chart and a smaller table with columns for Department, Balance, and Budget.



Find a Report

Find a single expense report by its Sheet ID or GET ID. View detail on the report such as comments, travel dates, traveler, expense lines, and accounting.

[Pin to Dashboard](#)

The screenshot shows a detailed view of an expense report with a table of expense lines and a 'Comments' section.

If the expense report number is known, the report can be found without having to go through the search features.

Find Expense Report Identify a single expense report and see its detail

Report ID

[Search](#)