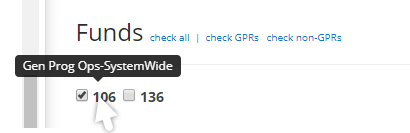
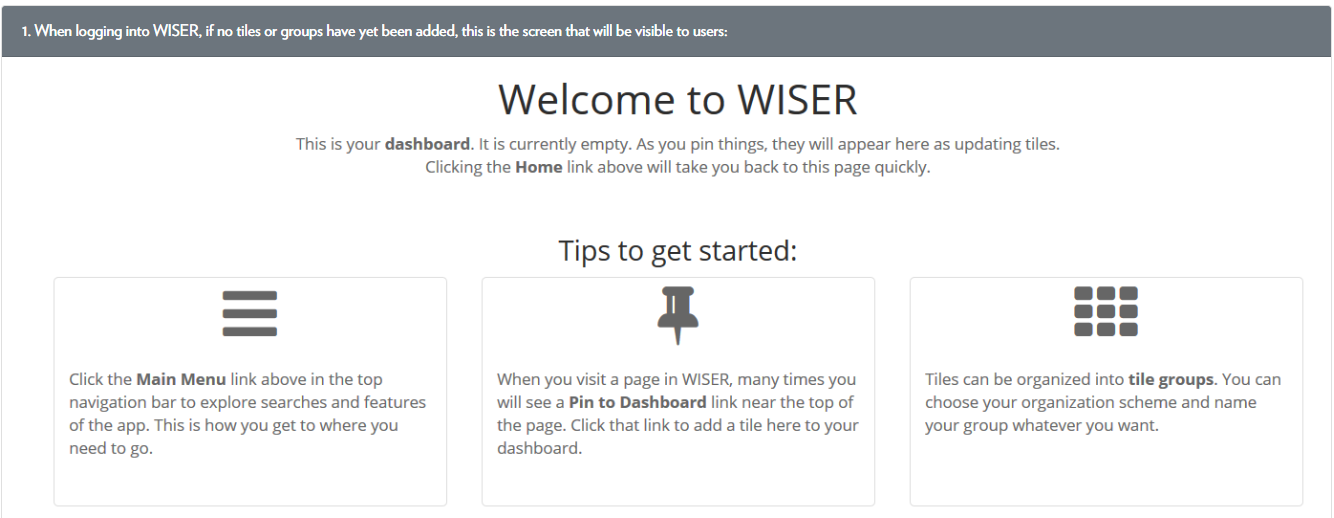
Useful Basics:

* Hover for hints



*  This symbol within WISER toggles between search and result screens
* No more “favorites”, instead use pin tile (to dashboard)
* Items available/viewable are dependent on individual permissions
* Top menu bar is always available during WISER navigation
* WISER is read only – users are not able to permanently change data
*  This symbol (on a screenshot in this document) indicates what was selected to move to the next screenshot shown.

*Initial screen prior to any personalization*



[Home Page](#Home)

[Main Menu](#MainMenu)

[Find Departments](#Department)

[Find Awards/Projects](#Award)

[My Projects](#MyProj)

[Award Modification Search](#AwardMod)

[Wisper – find data](#WISPER)

[AR Search](#AR)

[Find AP/PO](#FindAPPO)

[PO Search](#PO)

[Voucher Search](#Voucher)

[Vendor Search](#Vendor)

[Find Expense Reports](#Expense)

[Find Salaries & Encumbrances](#Payroll)

[Find Detailed Transactions](#Transaction)

Tools

[Budget Control Report](#BudgetControl)

[Funding Validation](#FundValid)

[Help Topics](#Help)

Administration

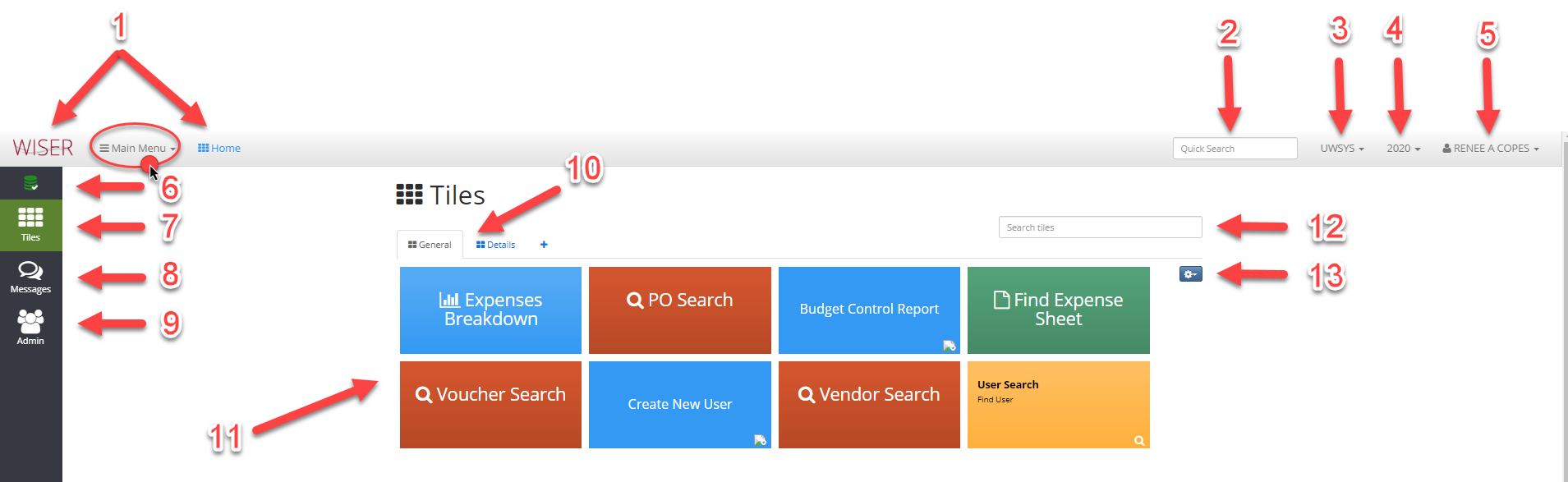
Create New User

[Find Users](#FindUser)

[Authorized User List](#AuthUser)

[Unit Settings](#UnitSettings)

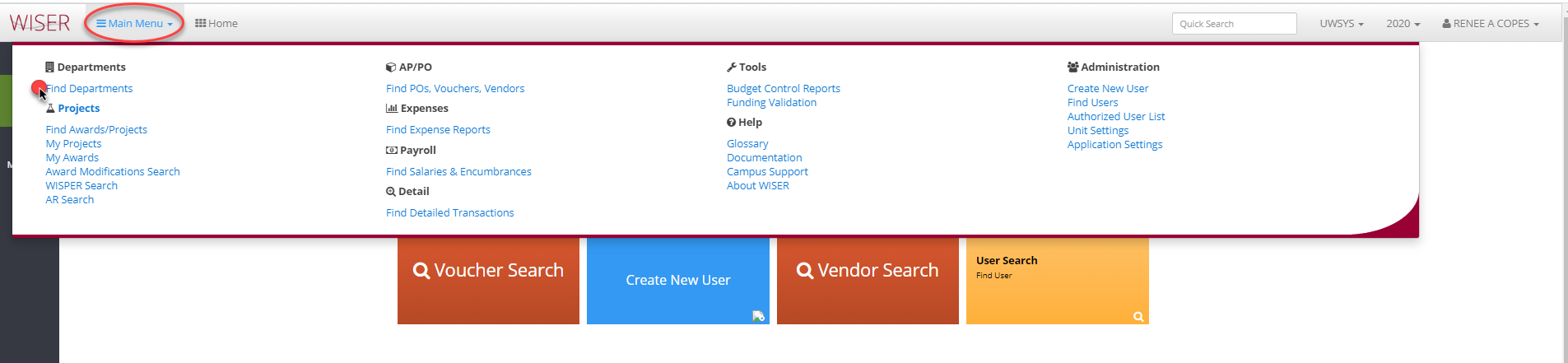
Reconciliation

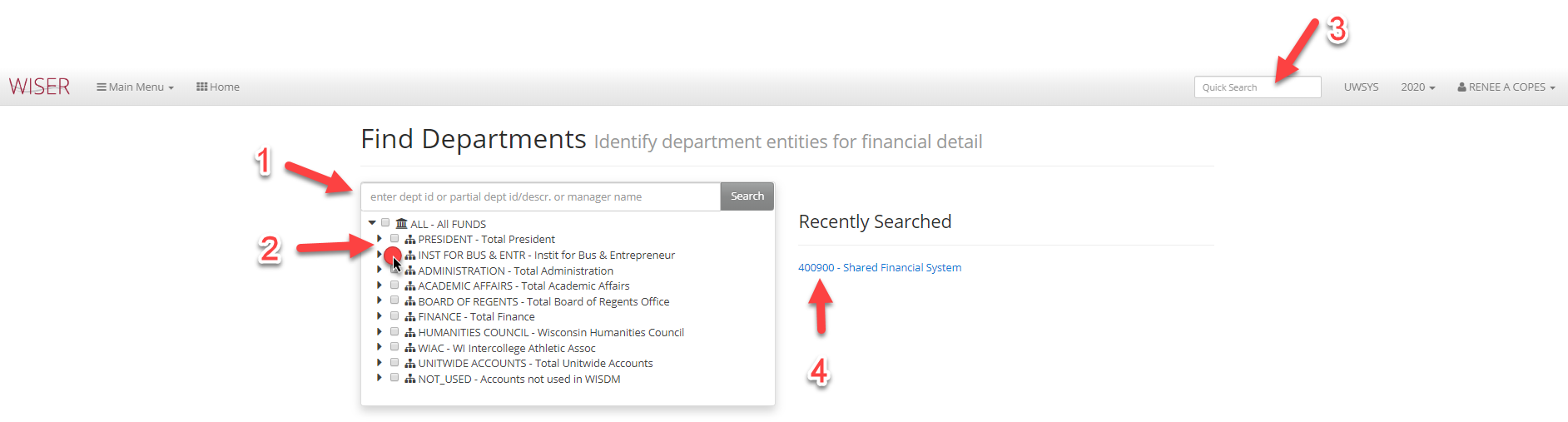
*Home*

1. Home
2. Quick Search
   1. Enter any information you have (example: Dept #, Account #, project #)
3. Business Unit selector
   1. Only available on certain screens (Home or Main Menu) to change selection (if an option)
4. Fiscal Year selector
5. User settings/log out
   1. Color scheme for tiles
   2. Datamart details and documentation
   3. Change password (not used for logging in to WISER, only for datamart access)
6. Database Status
   1. Details – List of processes run during ETL (Extract-Transform-Load, nightly process that imports SFS data into WISER)
   2. Daily Verify – lists journals added in the last ETL
7. Tiles
   1. What tiles you have pinned (option of pinning available on screen when possible)
      1. Delete
      2. Adjust size
      3. Rearrange order
   2. Tab for each group
   3. Add group
8. Messages
   1. Indicator for new messages
9. Admin
   1. Only visible if your permissions are as an Administrator
10. Tile tabs
    1. Navigate between groups of tiles or add group
11. Tiles pinned
    1. select tile to access the function/area
12. Search Tiles
    1. Enter tile name from any group to display
13. Tile Group Tools
    1. Delete
    2. Rename
    3. New (can be added here, or when given the option on location screen)

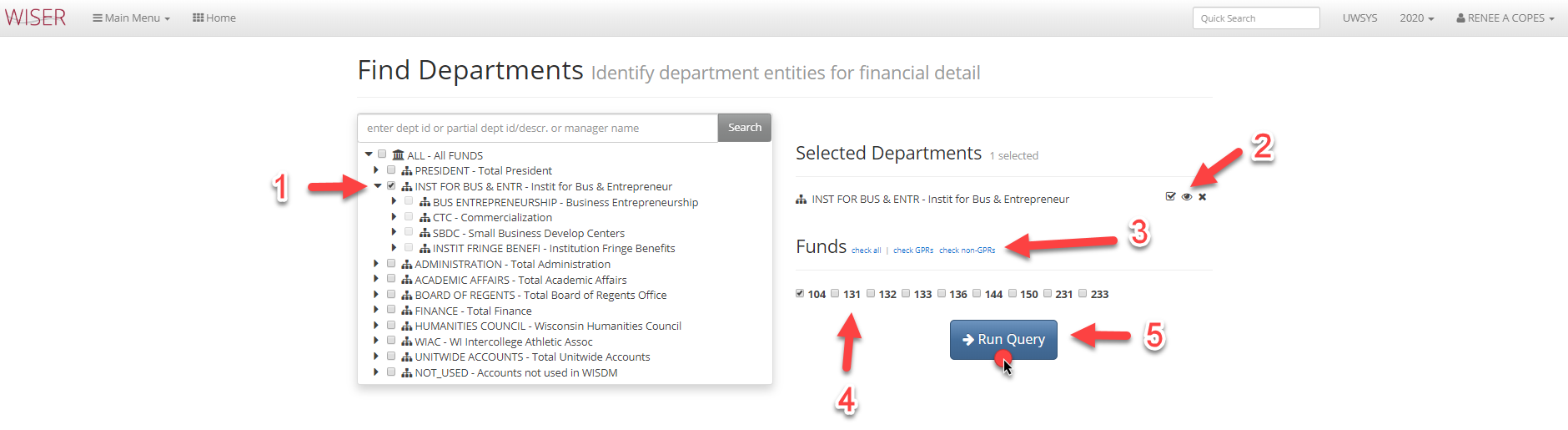
Main Menu

\*Available options dependent on your permissions.

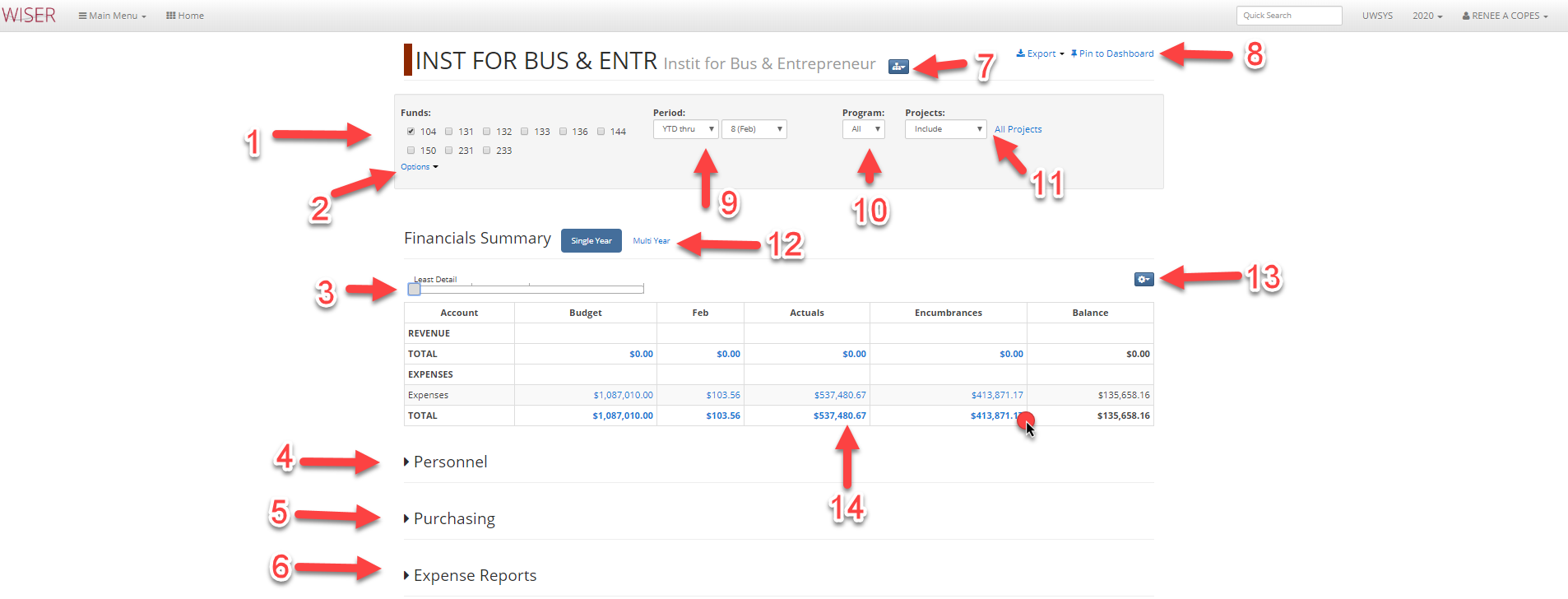
*Main Menu*

*Find Departments*

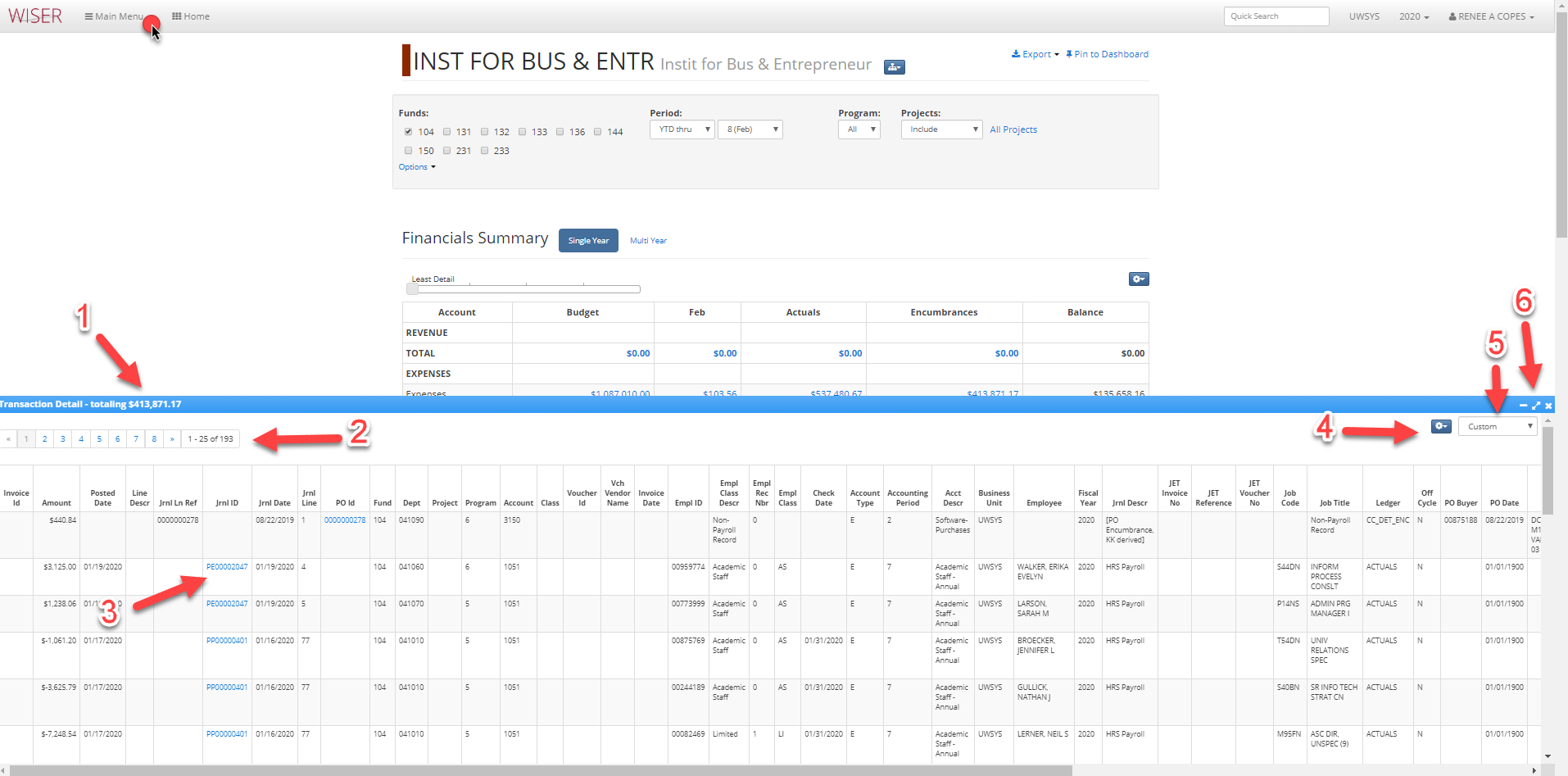
1. Search by department ID, description, or manager name
2. Expand, collapse, or select
3. Quick search still available
4. List of recently searched can be selected

*Find Departments – selection made*

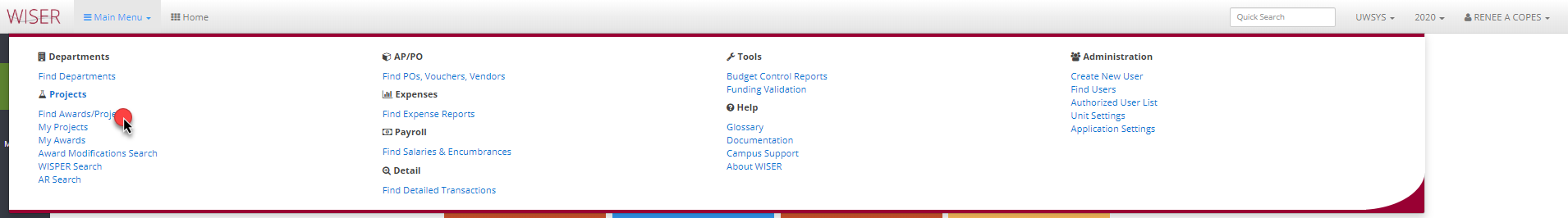
1. Selected
2. Department options
   1. Check all children
   2. Locate in Tree
   3. Remove
3. Select funds by group
   1. Check all
   2. Check GPRs
   3. Check non-GPRs
4. Options for fund selection
   1. Available funds displayed - Toggle/untoggled individual funds
5. Run Query with parameters selected

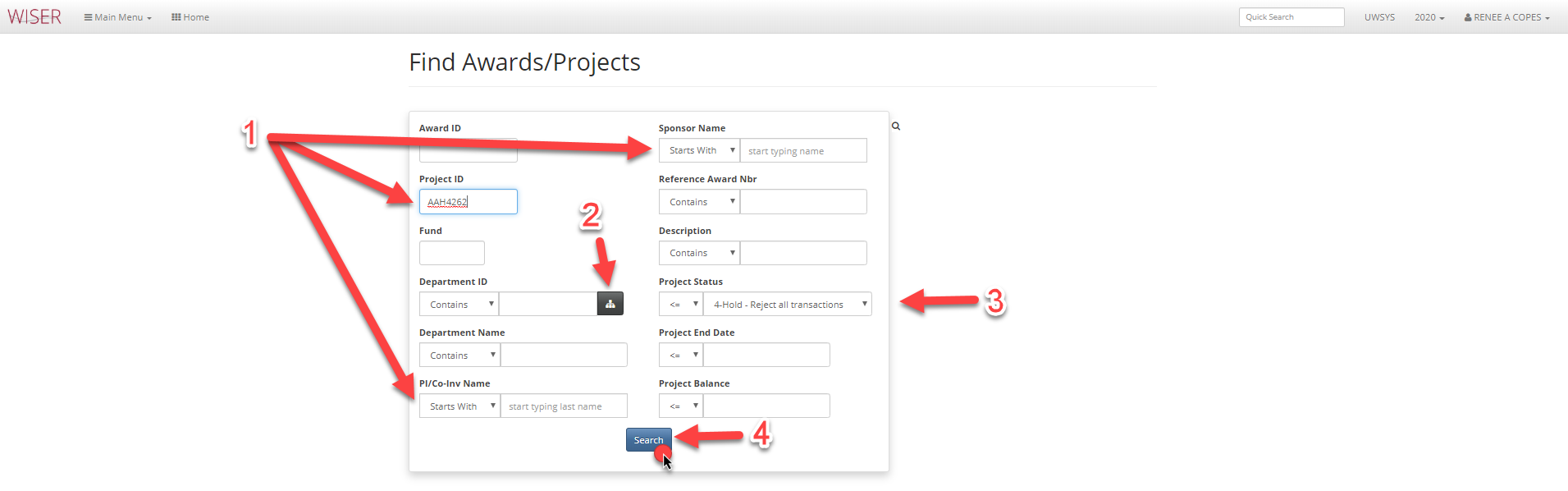
*Department Summary Report*

1. Funds available for inclusion – select/deselect individually
2. Fund options by group
   1. Select GPR
   2. Select non-GPR
   3. Select All
3. Detail slider
   1. Slide to increase or decrease tree level displayed on report
4. Un-collapse to view Personnel detail
   1. Option to Export to Excel
5. Un-collapse to view Purchasing detail
   1. Option to Export to Excel
6. Un-collapse to view Expense Reports
   1. Option to Export to Excel
7. Department selected options
   1. Scope up to All Funds
   2. View in Dept Tree
8. Export Report to Excel or Pin to Dashboard (Tiles)
9. Period options
   1. YTD
   2. ITD
   3. Period Only
   4. Quarter Only
10. Program Options
    1. All
    2. Available are listed and can be individually selected
11. Project Options
    1. Include
    2. Exclude
    3. Only
    4. All
12. Financial Summary Single Year or Multi Year selector
    1. Multi Year displays a 5-year span
13. Settings
    1. Tree selector
    2. Set to default
    3. Include AJE Ledger
14. Amounts are hyperlinks – select for detail

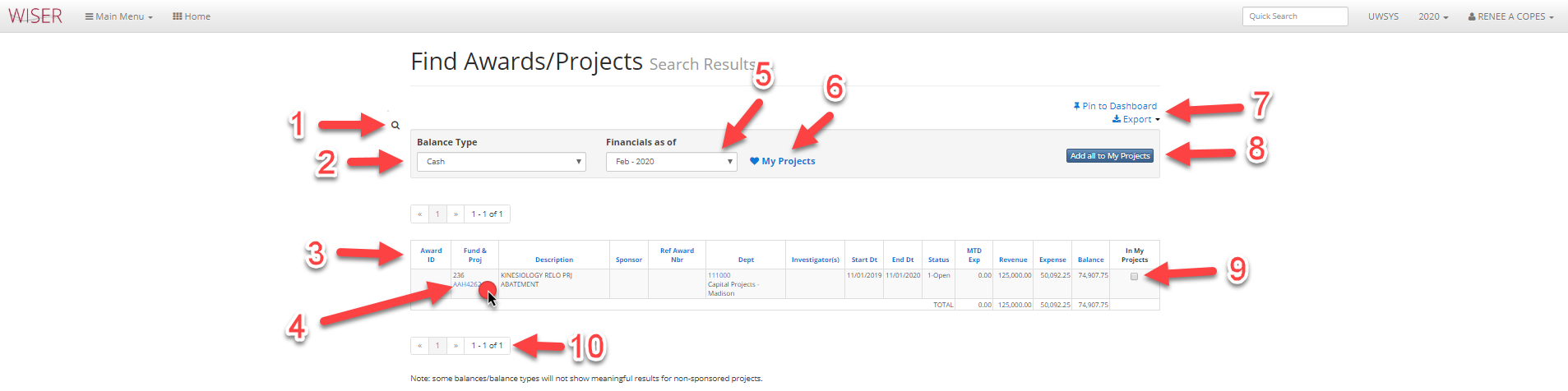
*Detail displayed after hyperlink selected*

1. Amount of hyperlink selected for detail currently displayed
2. Page navigation
3. Hyperlinks to further detail
4. Settings
   1. Export to Excel or PDF
   2. Customize columns
      1. Select/deselect columns to include
      2. Reorder column display
      3. Revert to default
5. Detail source
   1. Custom
   2. AP
   3. Standard
   4. Salary/Fringe
6. Minimize/Expand/Close Transaction Detail section

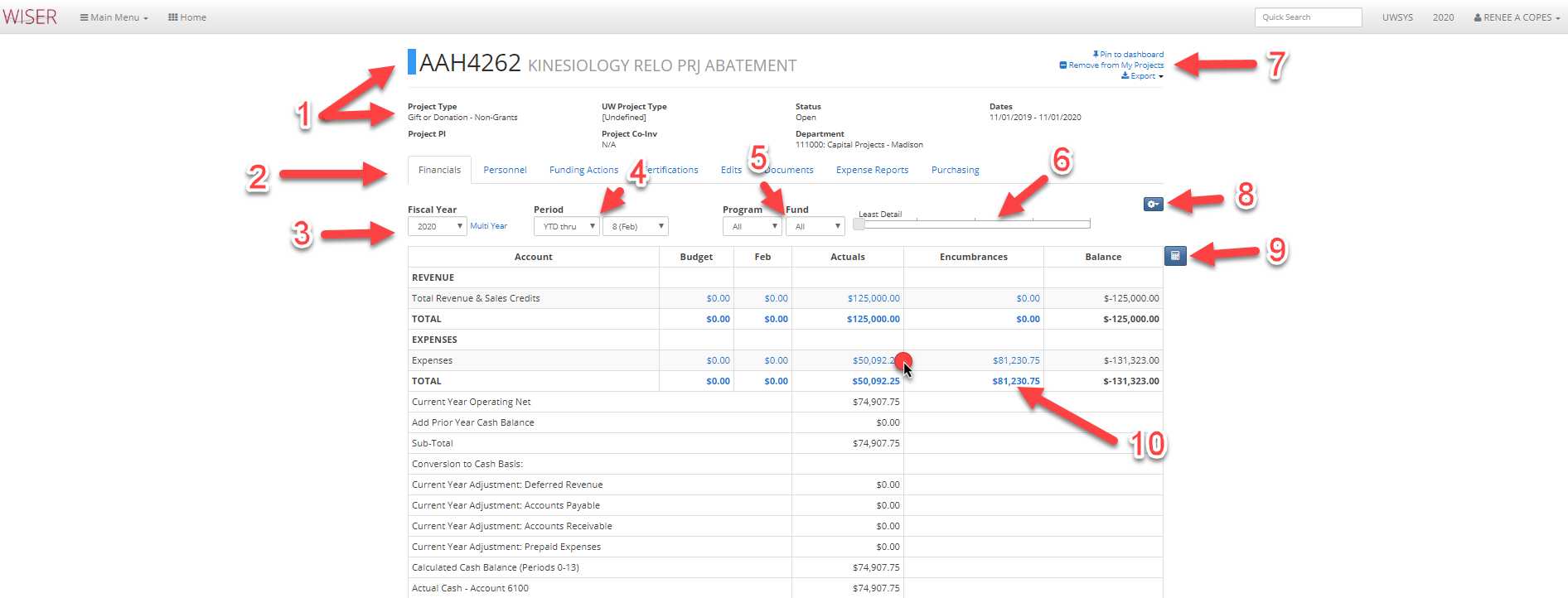
*Main Menu*

*Find Awards/Projects*

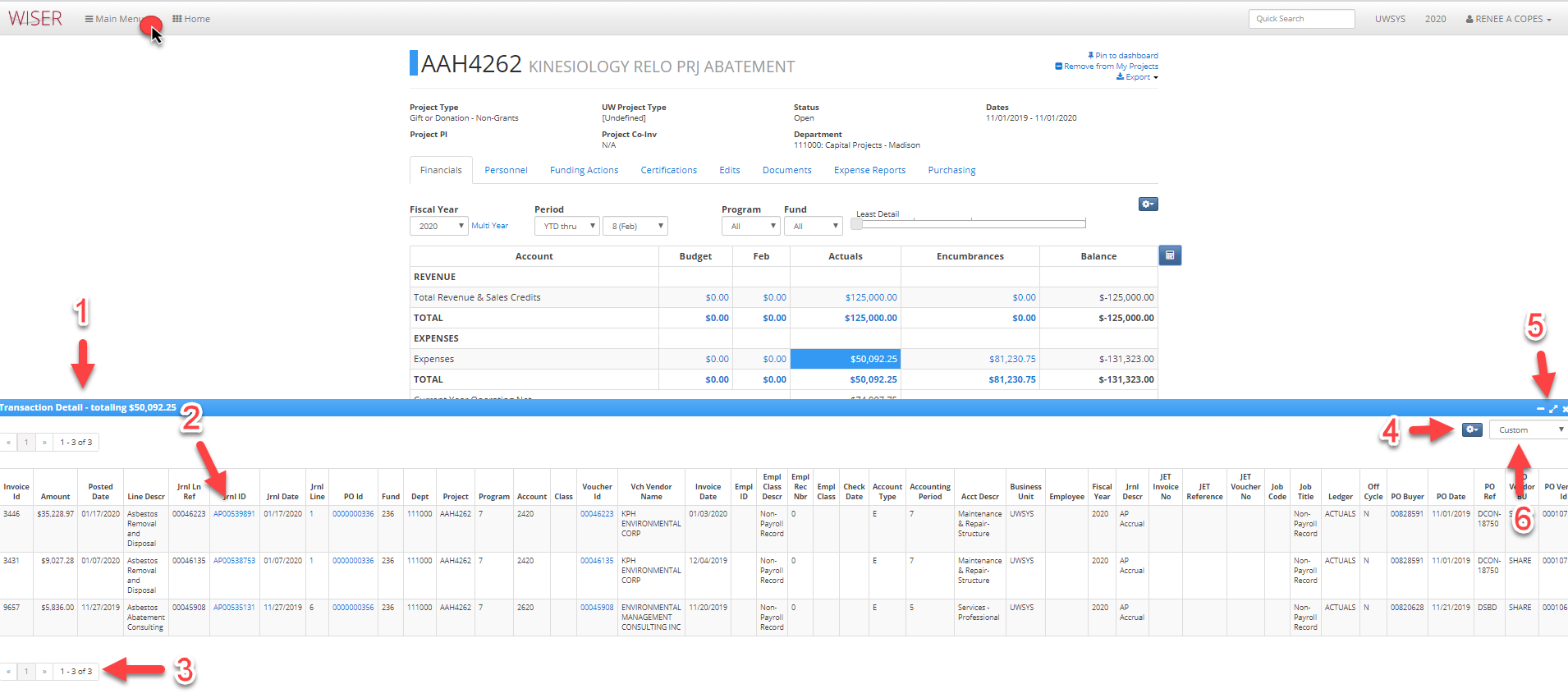
1. Enter any search criteria
   1. The more criteria, the narrower the search
   2. All are optional
   3. For open text fields a partial ID/# can be entered to return a list of matches
2. Show Department picker
   1. Displays tree view of departments for selection
3. Default value can be changed
4. Search using criteria entered

*Search Results*

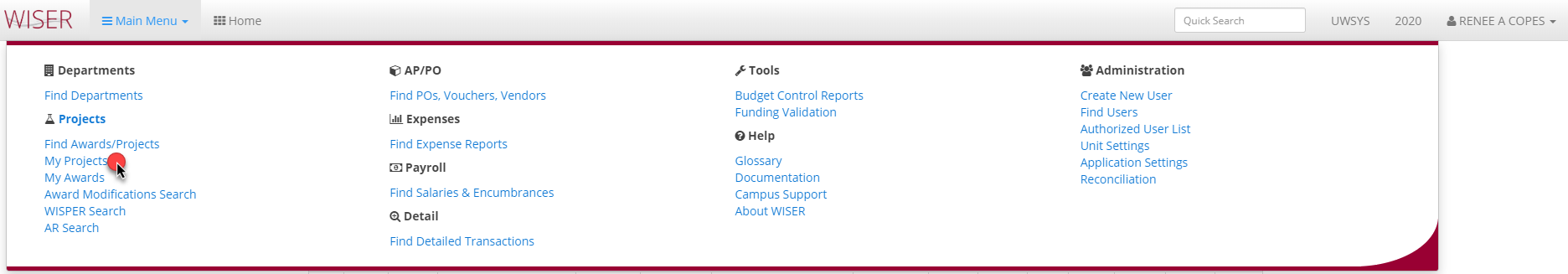
1. Return to Find Awards/Projects search
2. Drop down menu to choose Balance Type
3. Column headers can be used to sort list (if multiple results shown)
4. Project ID is a hyperlink to details
5. Drop down selector for month to display financials for
6. Add to My Projects list
7. Pin to Dashboard (create tile or add to existing group on Homepage) and Export options
8. Add All to my projects – useful for lists of results
9. Checkbox to add to My Projects list – useful when selecting multiple, but not all from list
10. Page navigation

*Hyperlink detail Results*

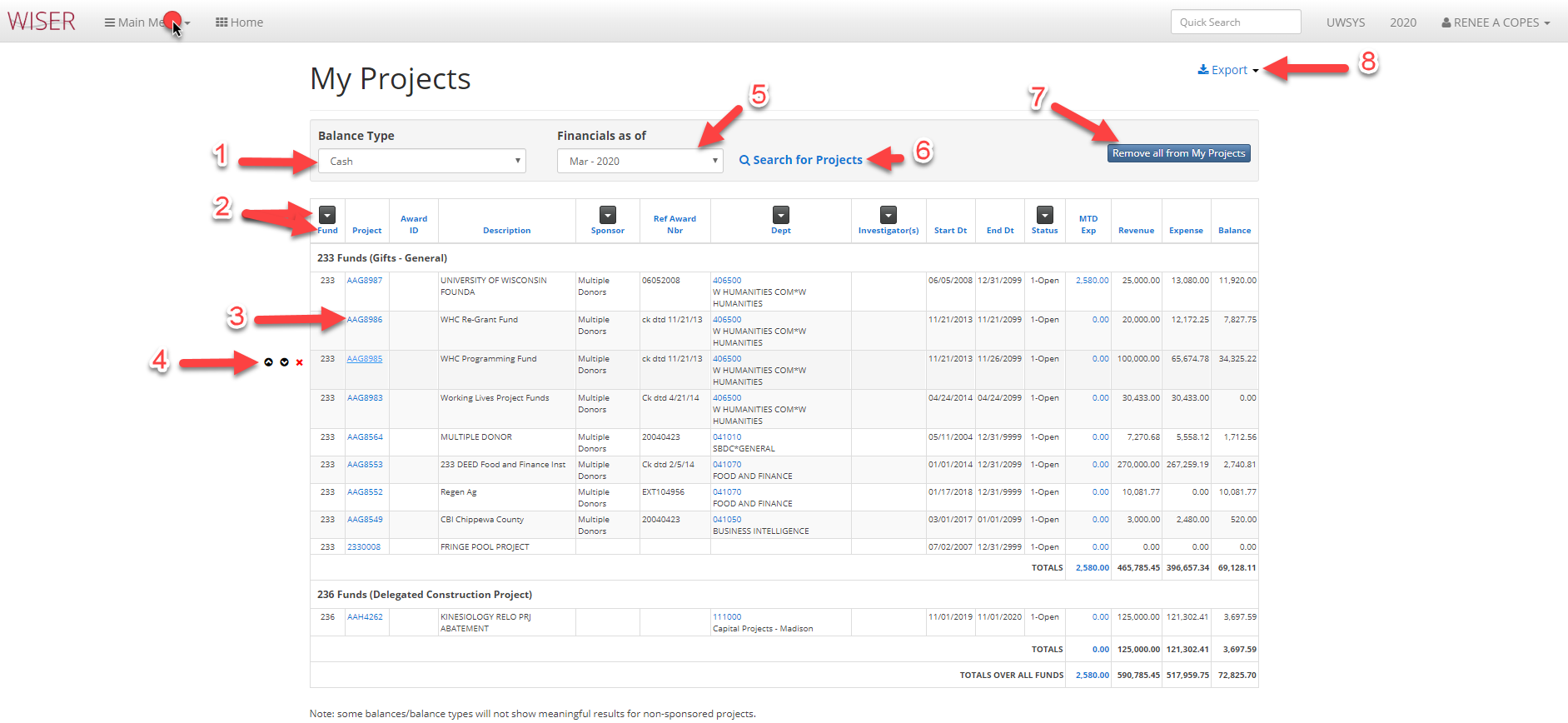
1. Details on Project
2. Tabs for additional information (if any)
3. Fiscal year selector and option for Multi Year
4. Period selector
5. Program and Fund selector (available options included in drop down)
6. Slide to increase or decrease detail
7. Options for Project
   1. Pin to Dashboard (tile)
   2. Remove from My Projects list
   3. Export options
8. More options
   1. Change Tree used
   2. Set current level to default
   3. Toggle to include Period 998
9. Toggle cell selection mode
   1. Allows you to select amounts and calculates Sum, Count, and Average
   2. Select again to toggle off cell selection mode
10. Blue amounts are hyperlinks to further detail

*Hyperlink Transaction Details results*

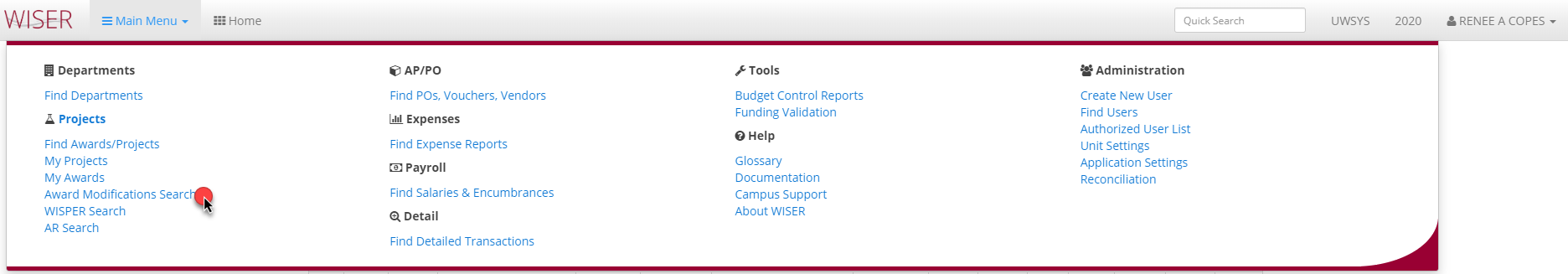
1. Total of transaction detail selected/displayed
2. Blue text signifies hyperlinks to further detail
3. Page navigation
4. Detail options
   1. Export to Excel or PDF
   2. Customize – can add, remove, or reorder columns
   3. Records per page
5. Minimize, maximize, or close detail window
6. View presented as - AP, Standard, Salary/Fringe, Custom

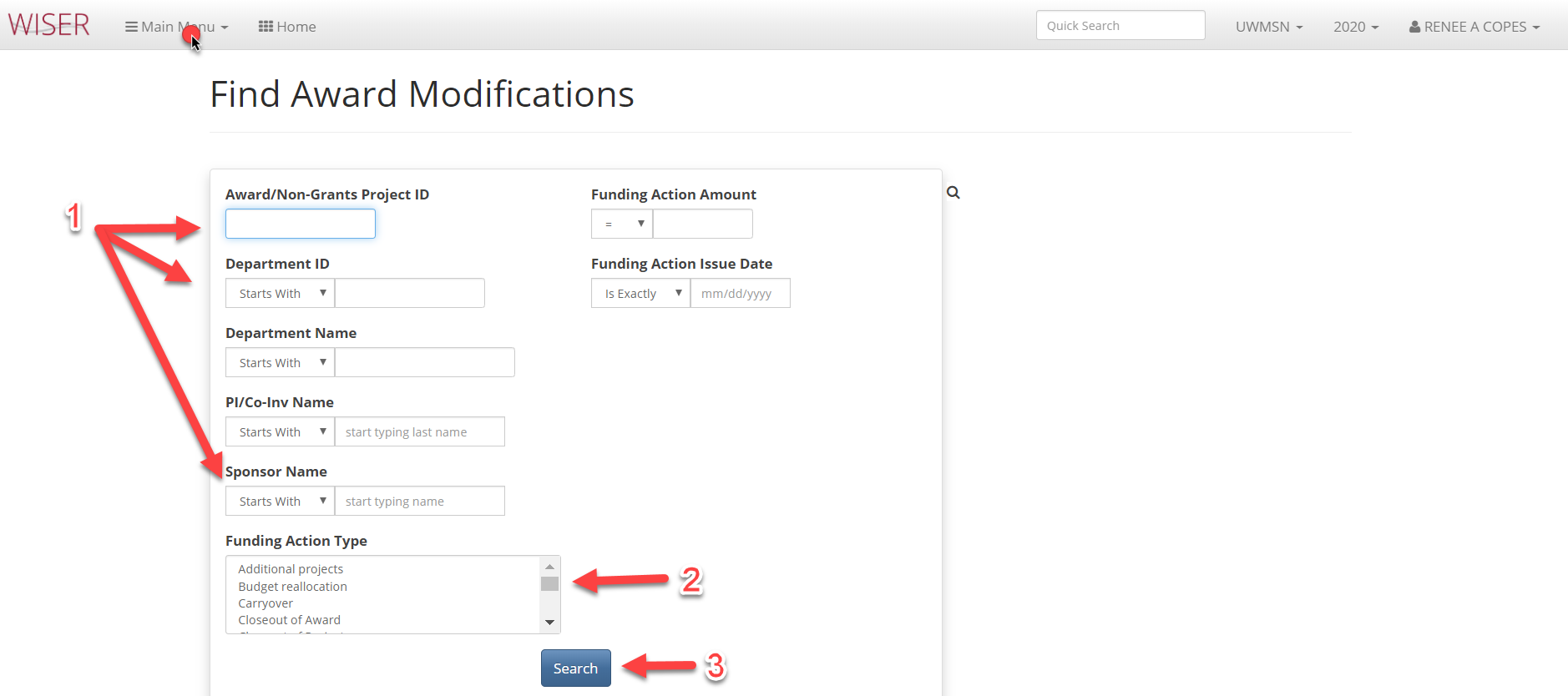
*Main Menu*

\*My Awards has the same following screen/options as My Projects

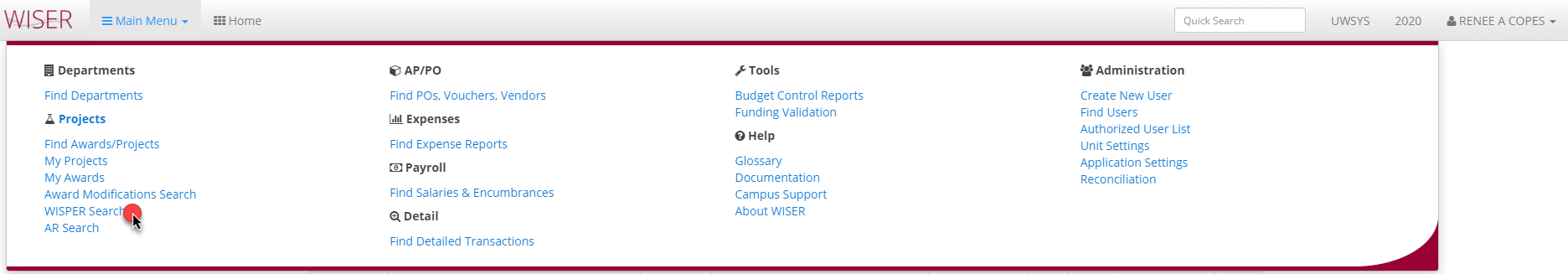
*My Projects list*

1. Select Balance Type displayed
2. Arrow is filter & column headings sort items in display
3. Blue hyperlinks within project listing
   1. Project/Award = search results (summary report)
   2. Dept = list of all projects within that department
   3. Investigator = list of projects having that investigator
   4. Dollar amount = detail that comprises the amount
4. Options to move project up/down on list, or remove
5. Dropdown of month timeframe
6. Search
7. Remove all listed from My Projects
8. Export options

*Main Menu*

*Award Modification Search*

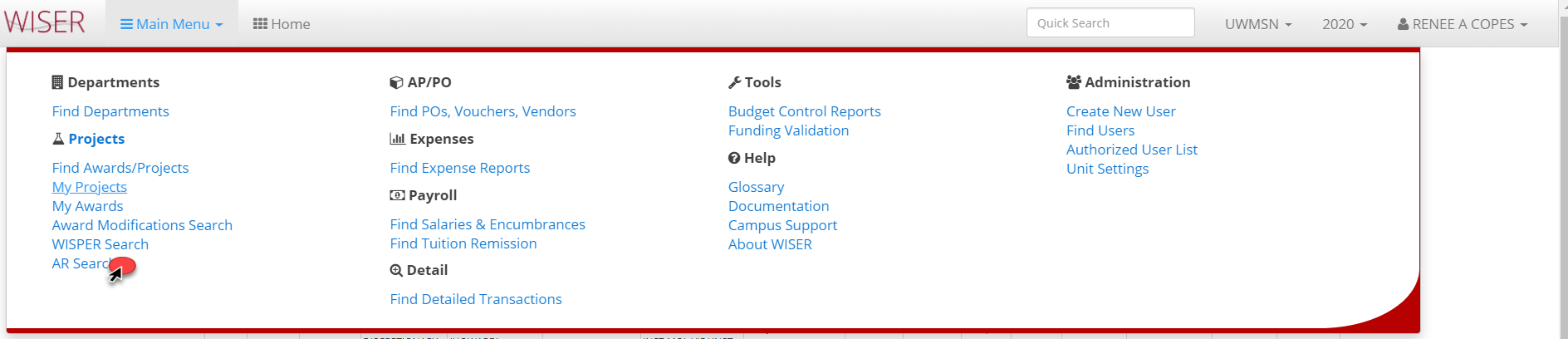
1. Enter criteria for search
   1. The more criteria entered, the narrower the search
2. Listing of available funding action types to use as criteria
3. Begin search using criteria entered

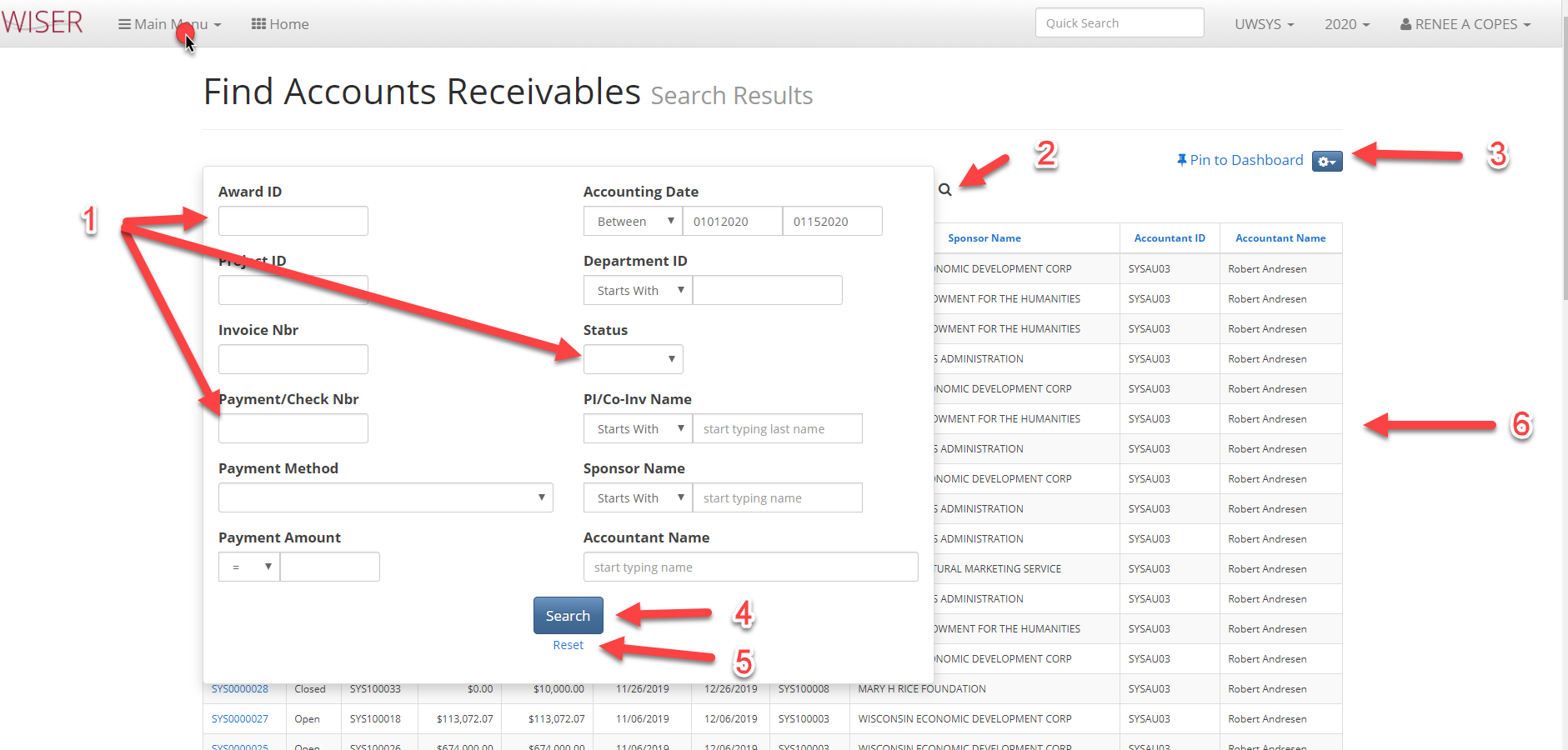
*Main Menu*

*WISPER Search*

1. Enter criteria for search
   1. The more criteria entered, the narrower the search
2. Toggle between search screen & results
3. Begin search using criteria entered

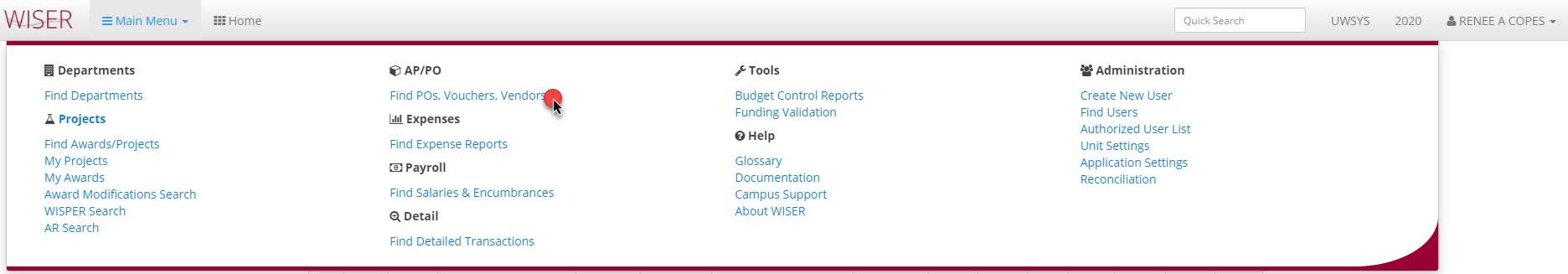
*Main Menu*



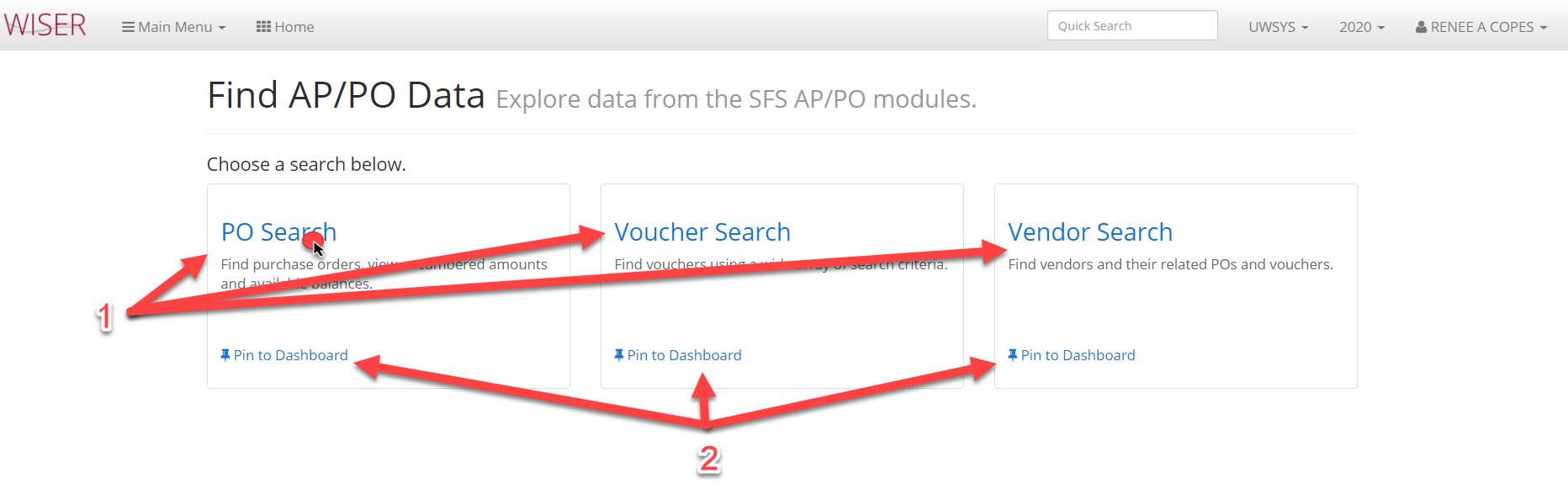
*AR Search*

\*shown with search screen over results

1. Input criteria
   1. The more criteria supplied, the narrower the search results
2. Toggle between search screen & results
3. Pin to dashboard (create tile)/export and view options
4. Begin search using supplied criteria
5. Clear entered criteria
6. Search results using date range criteria

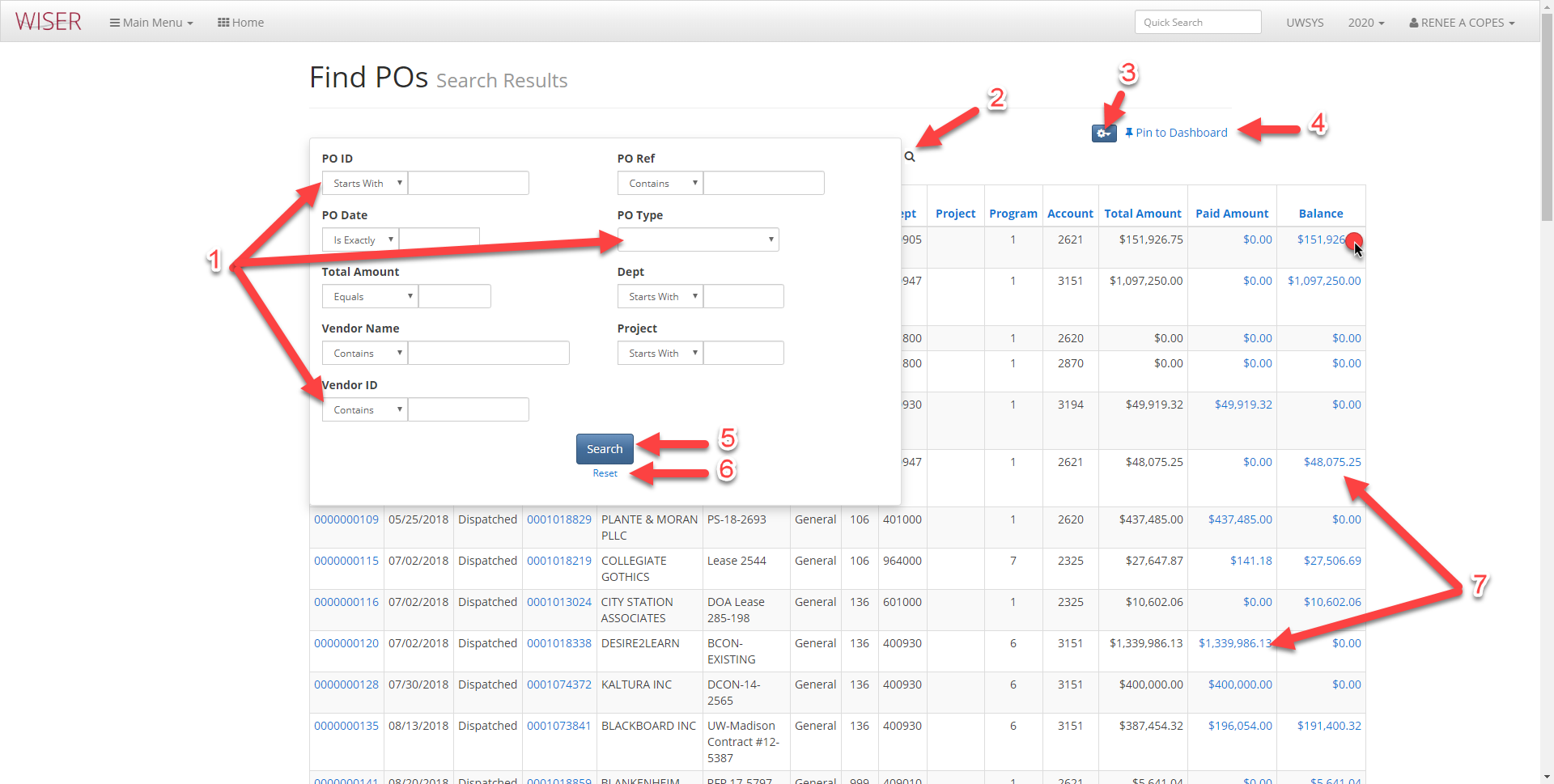
*Main Menu*

*Find POs, Vouchers, Vendors*



1. Select from search options
2. Pin (create tile) search type to dashboard

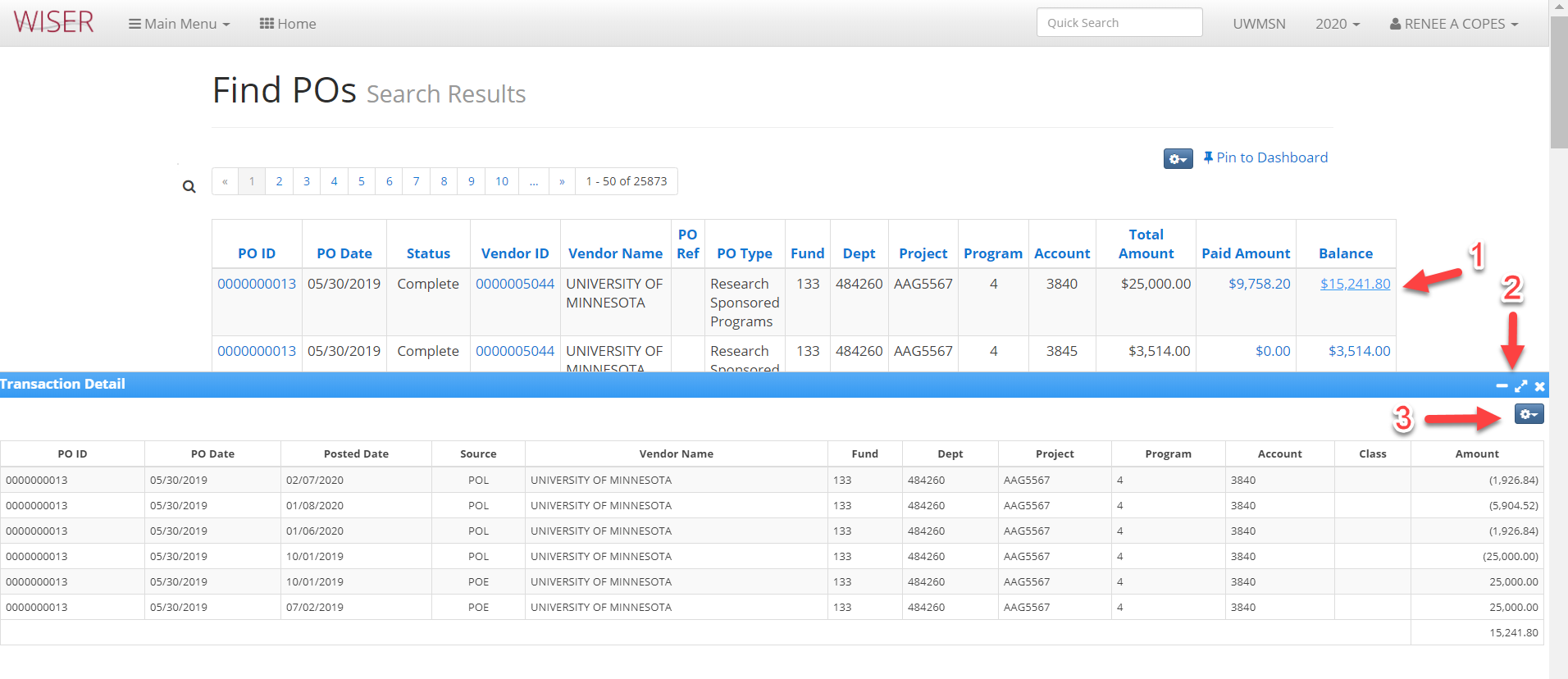
*Find POs with results*



\*search screen shown over results

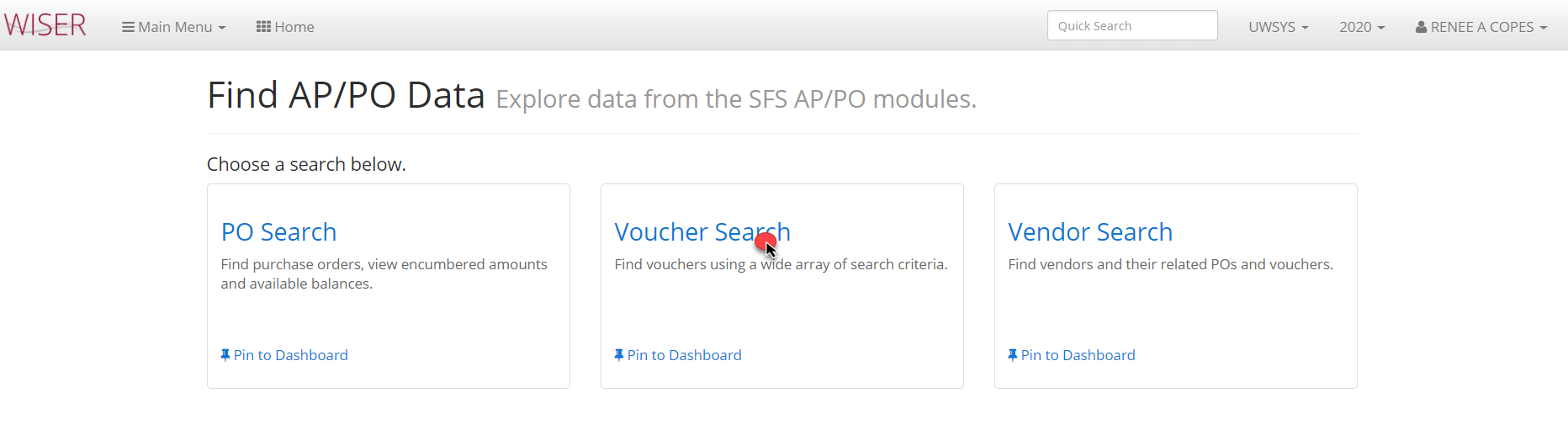
1. Enter criteria for search
   1. More criteria = narrower search
2. Toggle between search screen & results
3. Export & records per page options
4. Pin (create tile on homepage)
5. Begin search on criteria supplied
6. Reset search screen
7. Blue hyperlinks on results lead to detail

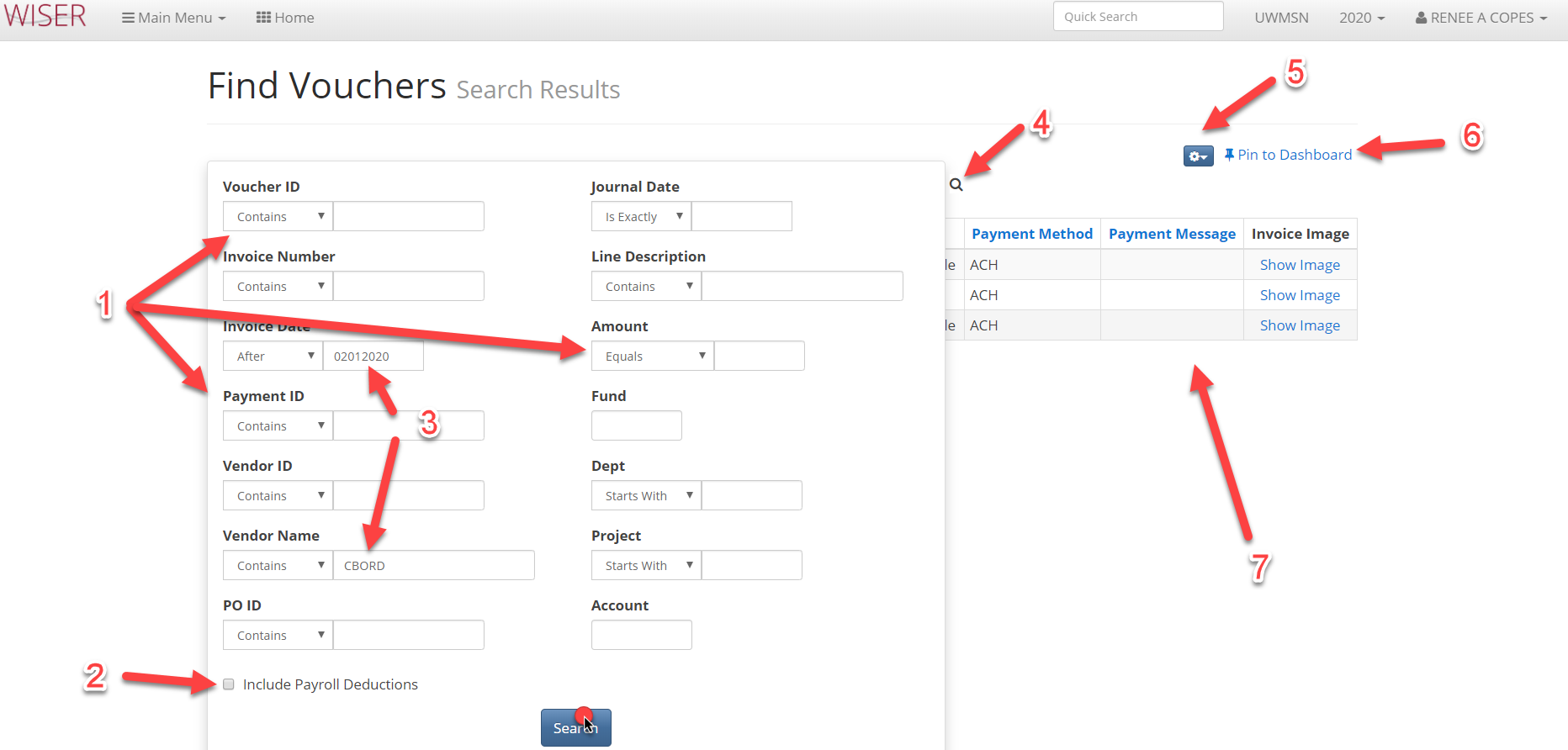
*Find PO search results with hyperlink selected*



1. Hyperlink selected
2. Minimize/maximize/close Transaction Detail area
3. Export detail to Excel

*Main Menu > find POs, Vouchers, Vendors*

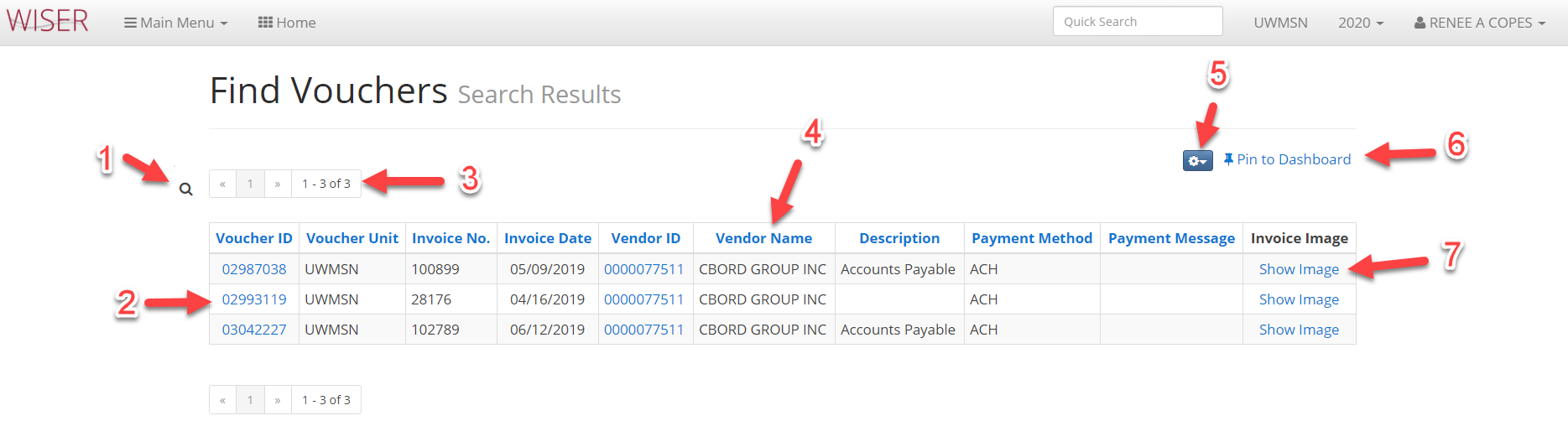


*Find Vouchers with results*

\*search screen shown over results

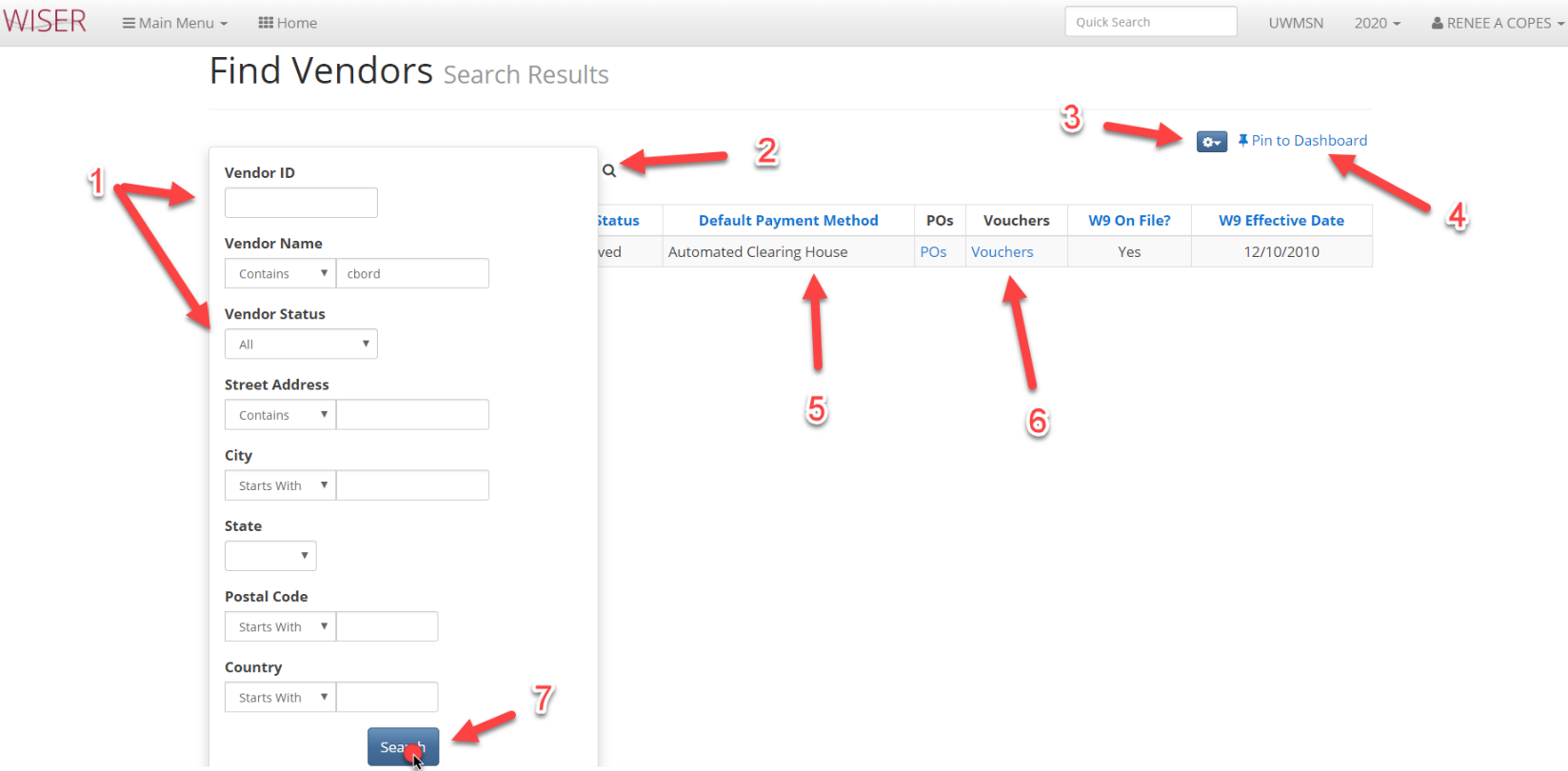
1. Enter search criteria
   1. More criteria = narrower search
2. Toggle to include/exclude Payroll deductions
3. Criteria entered
4. Toggle between search and result screens
5. Export to Excel and records per page option
6. Pin to Dashboard (create tile)
7. Search results

*Find Vouchers results*



1. Toggle between search and result screens
2. Blue hyperlinks to further detail
3. Page navigation
4. Column headers used to sort
5. Export to Excel & select records per page
6. Pin to Dashboard (create tile)
7. If authorized to view

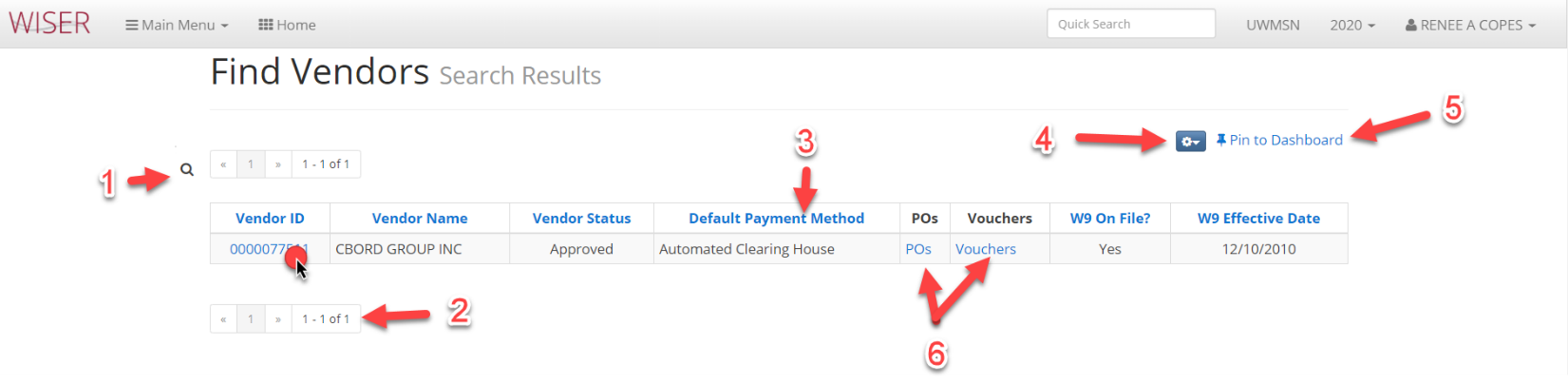
*Main menu > Find POs, Vouchers, Vendors > Vendors Search*



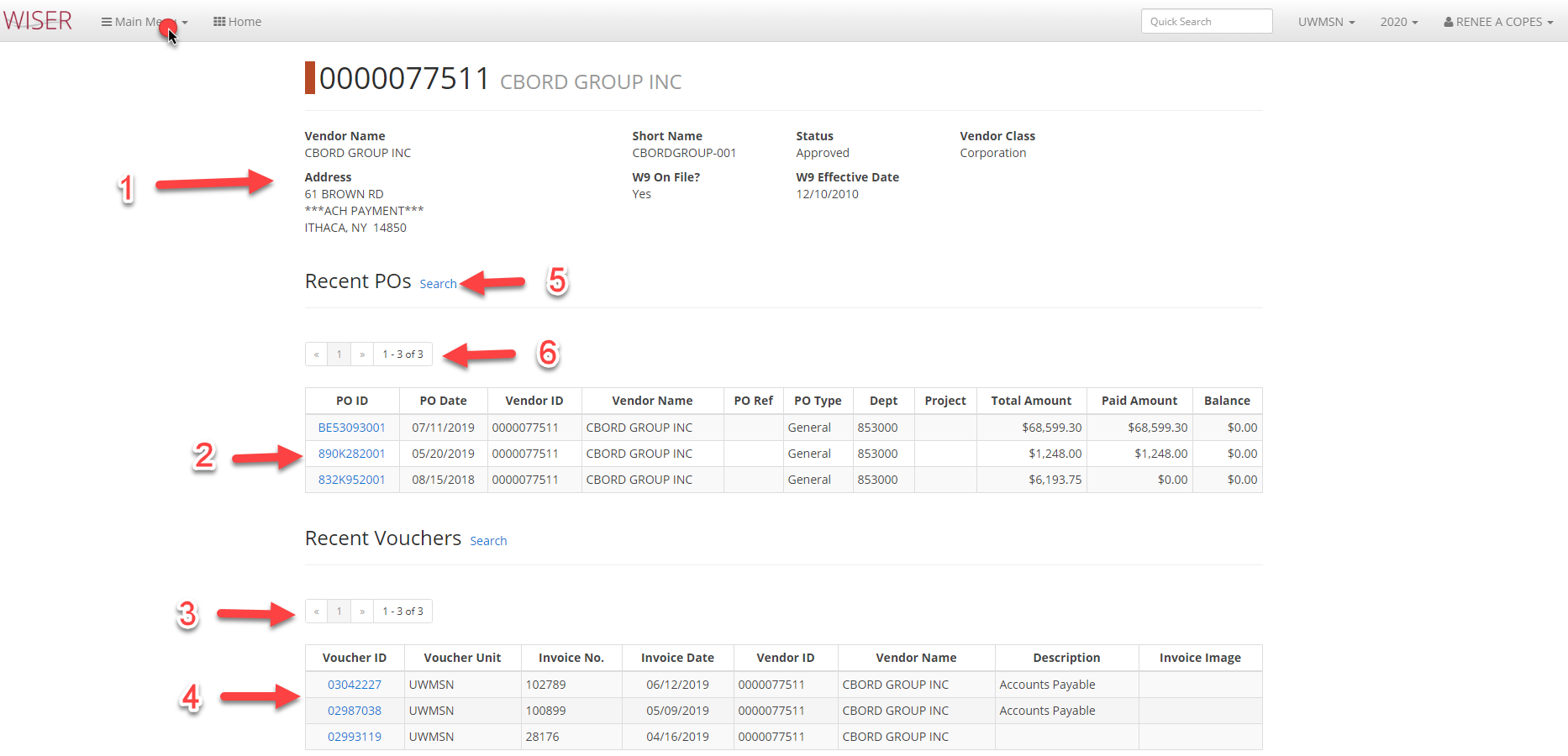
\*search screen shown over results

1. Search criteria
   1. Criteria narrows search
2. Toggle between search screen and results
3. Export to Excel and number of items displayed on page
4. Pin to Dashboard (create tile)
5. Details resulting from search
6. Blue hyperlinks to further detal
7. Run search with criteria entered

*Find Vendors results*

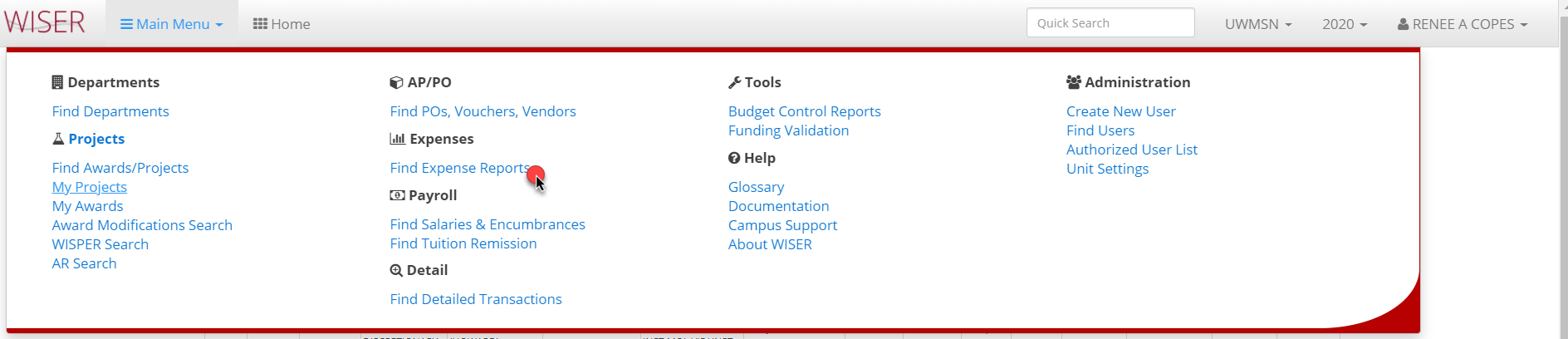


1. Toggle between search screen & results
2. Page navigation
3. Column headers used to sort
4. Export to Excel and number of displayed items per page
5. Pin to Dashboard (create tile)
6. Blue hyperlinks to further detail

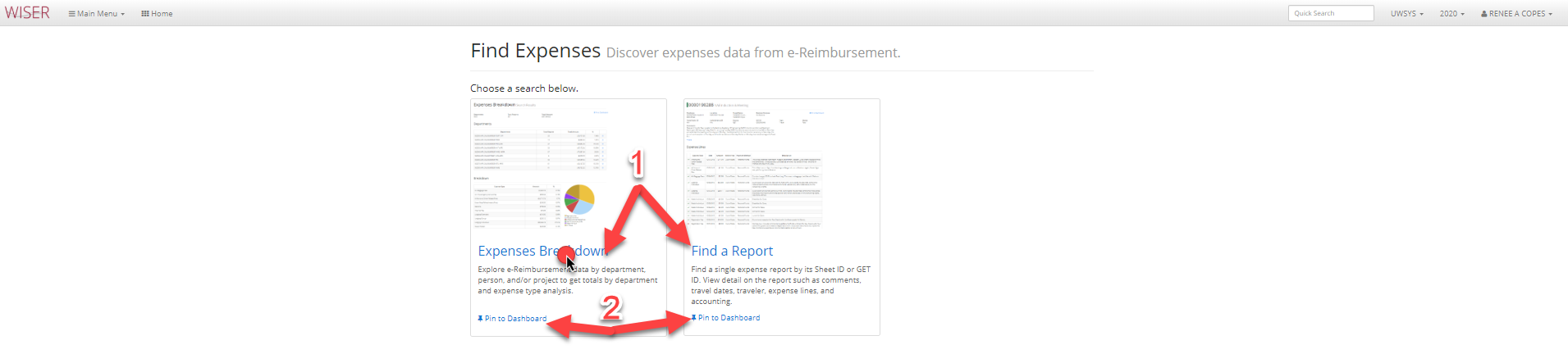
*Vendor*

1. Vendor details
2. PO list
   1. Hyperlink to detail
3. Page navigation
4. Voucher list
   1. Hyperlink to detail
5. Find Pos search results
6. Page navigation

*Main Menu*

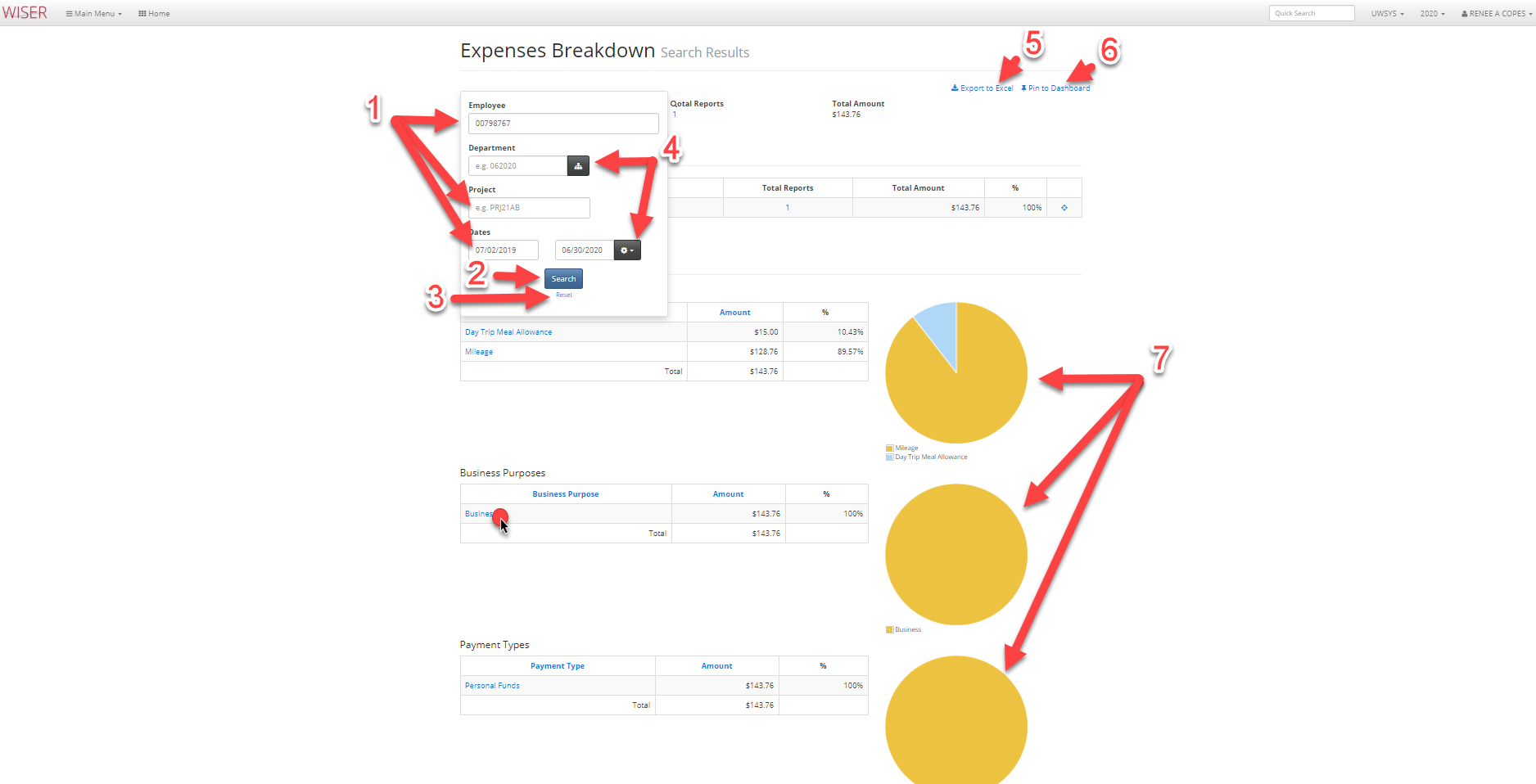


*Find Expense Reports*



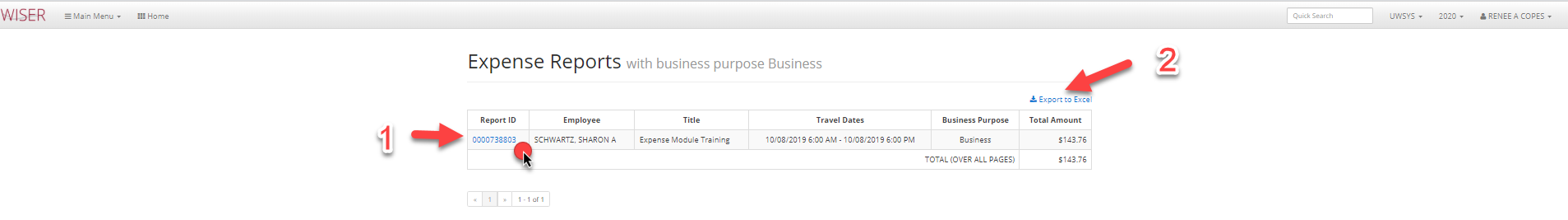
1. Search Expenses Breakdown or Find a Report
2. Pin to Dashboard (create a tile)

*Search results shown beneath criteria*

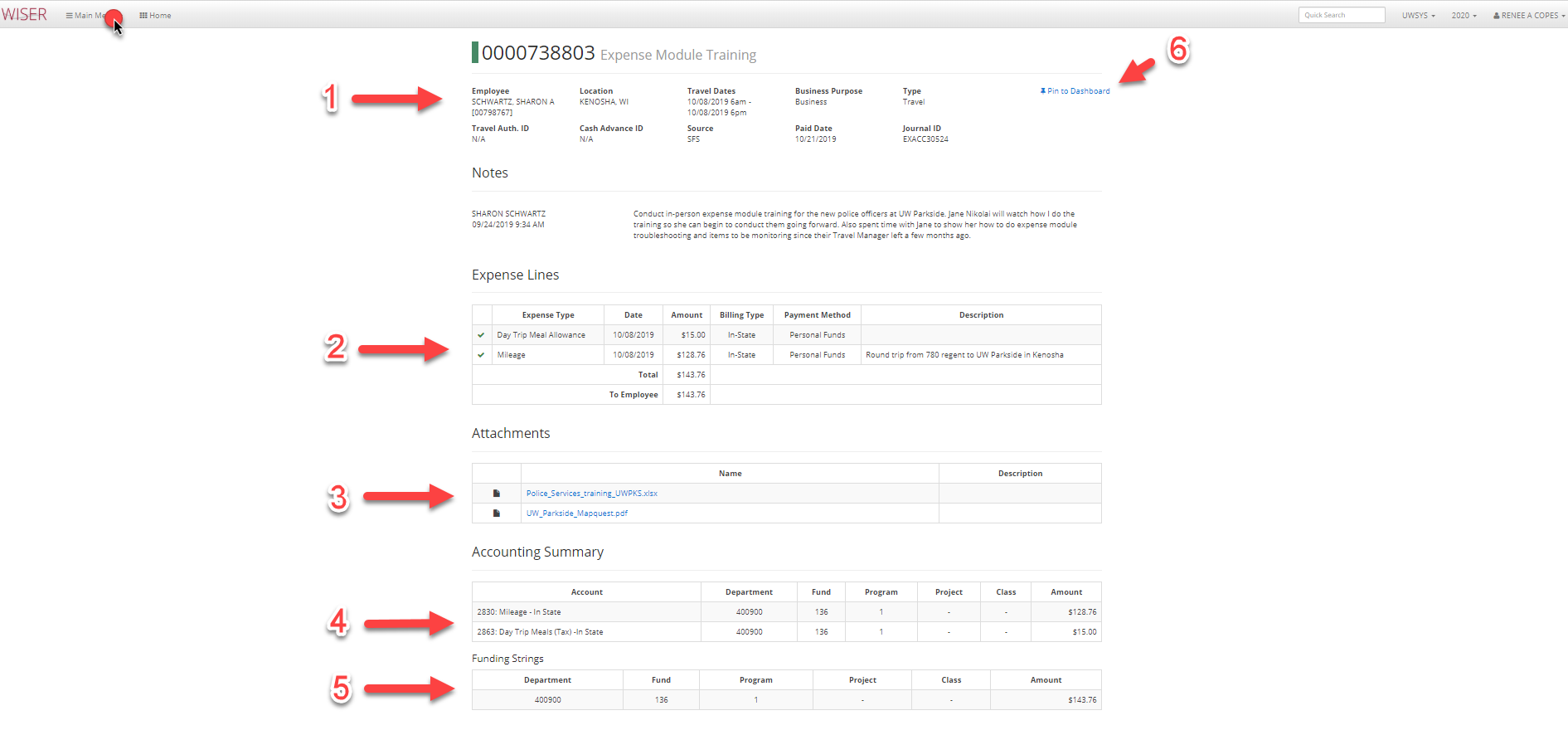


1. Enter search criteria
   1. More criteria narrows search
2. Begin search with criteria entered
3. Reset search criteria
4. Department picker and timeframe selector
   1. Last 30 days
   2. Last month
   3. This Fiscal Year
   4. Last Fiscal Year
   5. Clear
5. Export to Excel
6. Pin to Dashboard (create tile)
7. Graphical depictions of Expense breakdown

*Expense Report Listing*

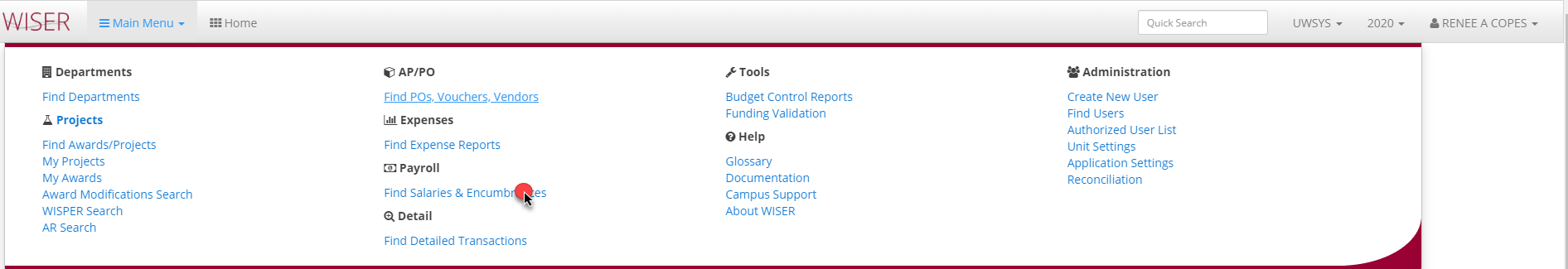


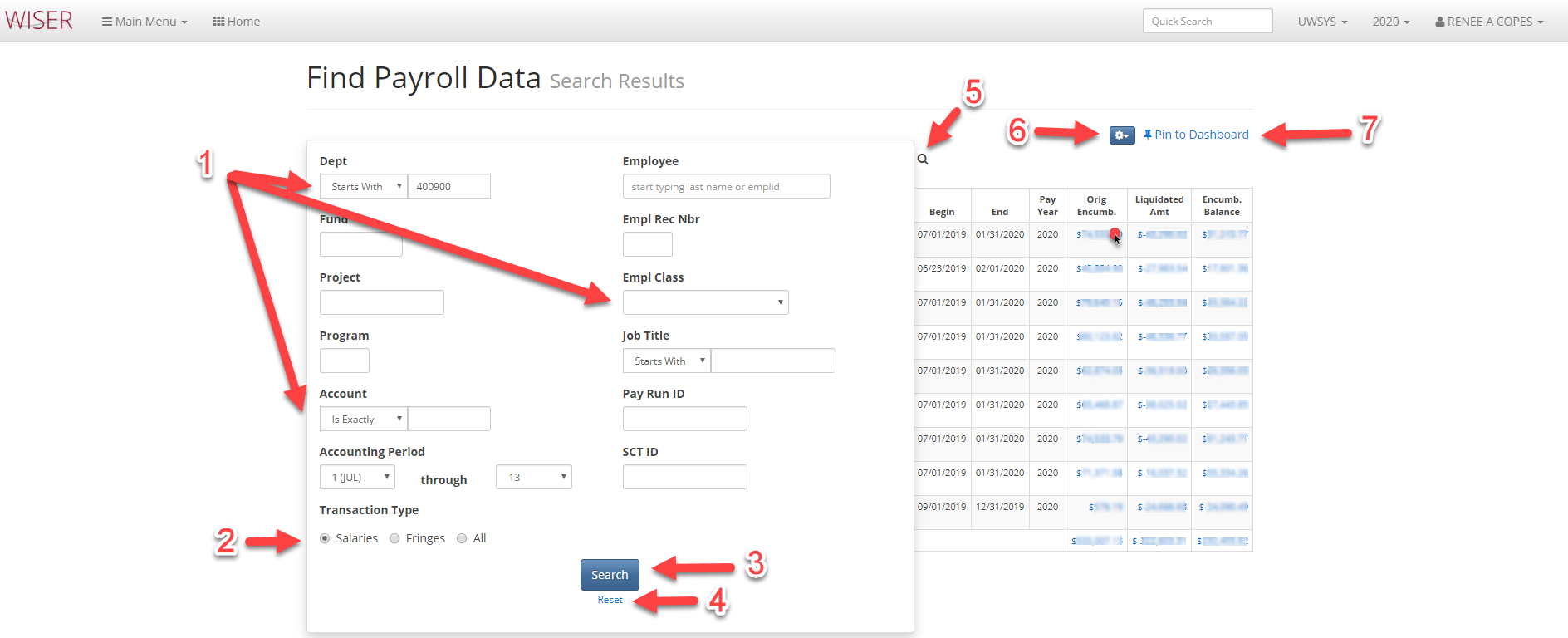
1. Hyperlink to Expense Report
2. Export to Excel

*Expense Report*

\*This is the screen displayed if “Find a Report” is selected from the initial *Find Expenses* screen options and a report number is entered as the search criteria

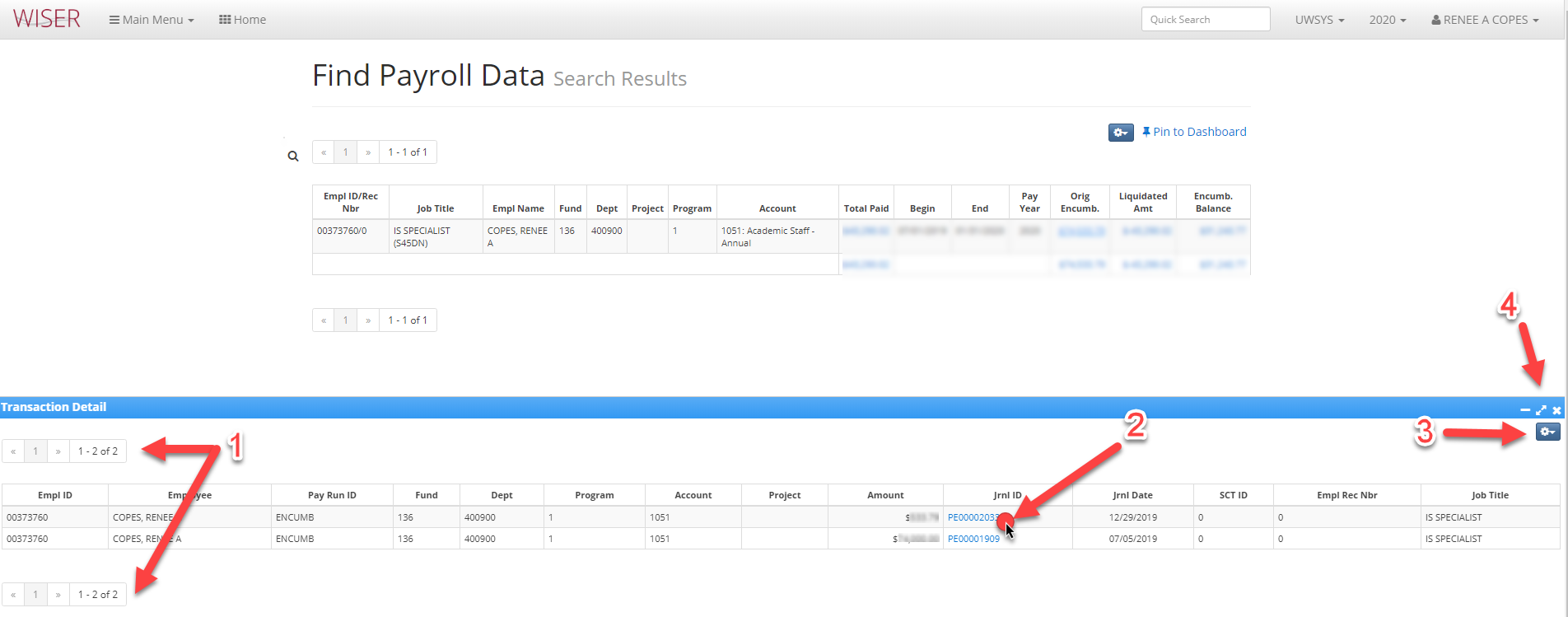
1. Expense Report details
2. Line breakdown
3. Hyperlinks to attachments
4. Accounting Summary
5. Funding Strings
6. Pin to Dashboard (create tile)

*Main Menu*

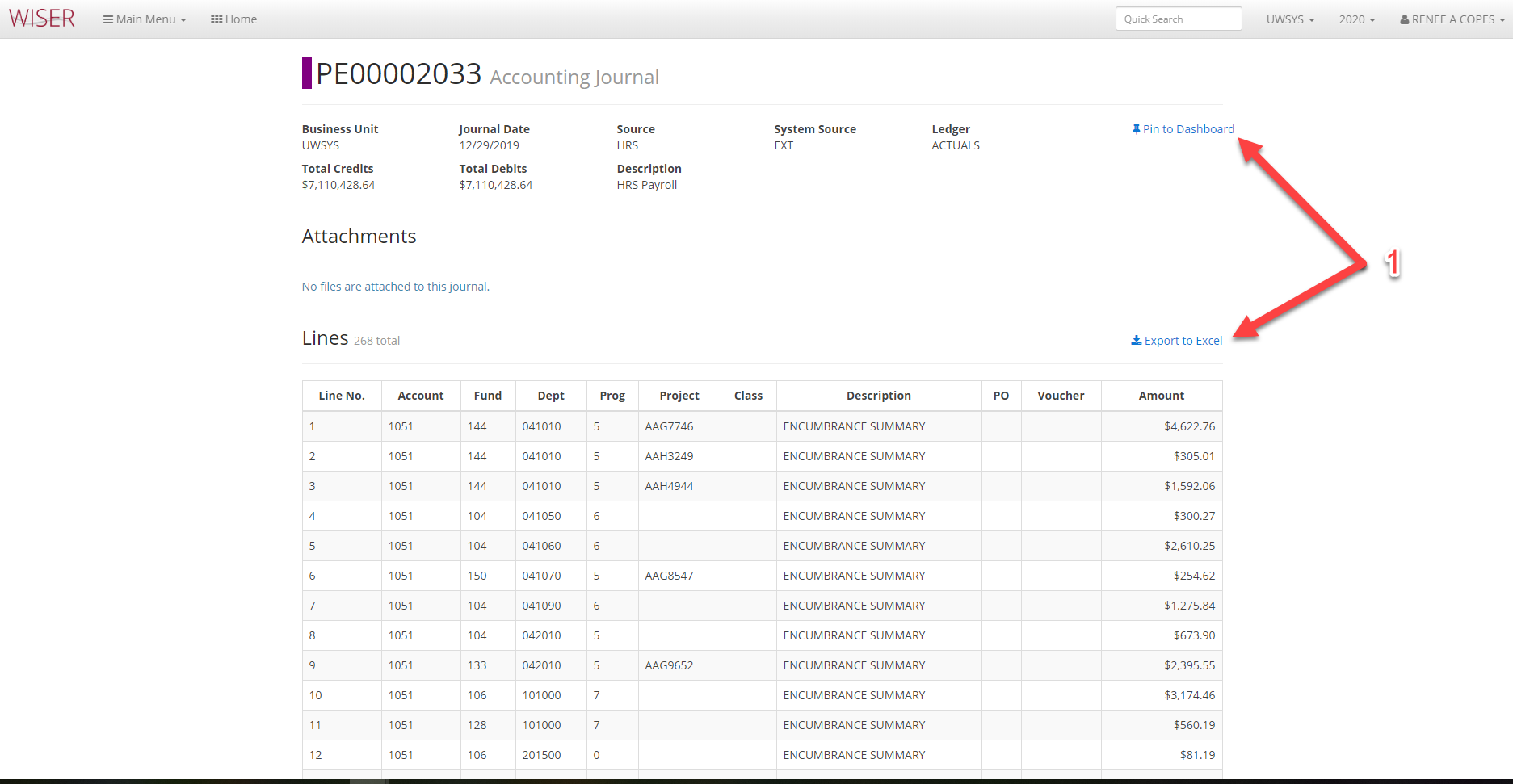
*Find Salaries & Encumbrances*

\*Search screen shown over results

1. Enter search criteria
   1. More criteria narrows search
2. Select desired data types to return
3. Initiate search with criteria entered
4. Reset search criteria
5. Toggle between search screen and results
6. Export to Excel/set records per page to view
7. Pin to Dashboard – create tile

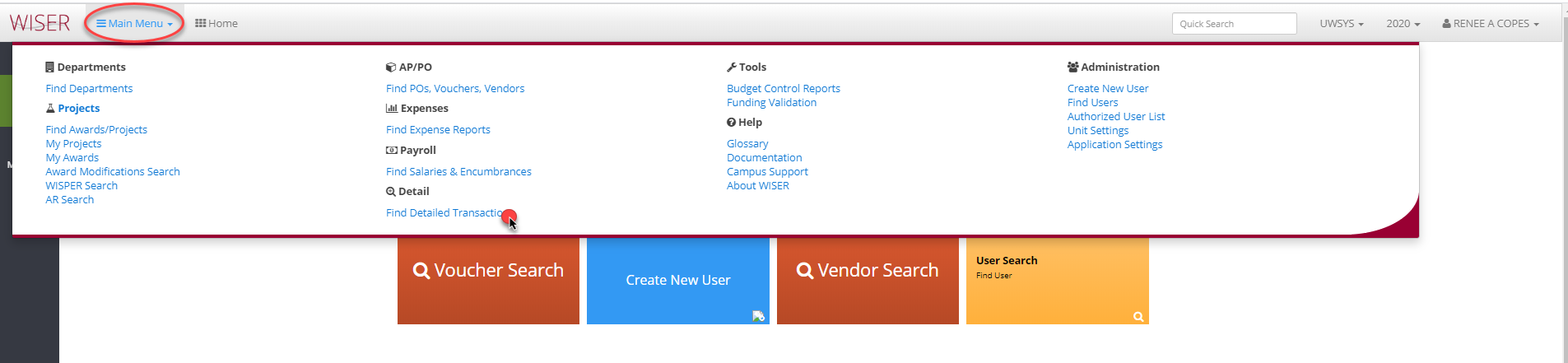
*Payroll Detail*

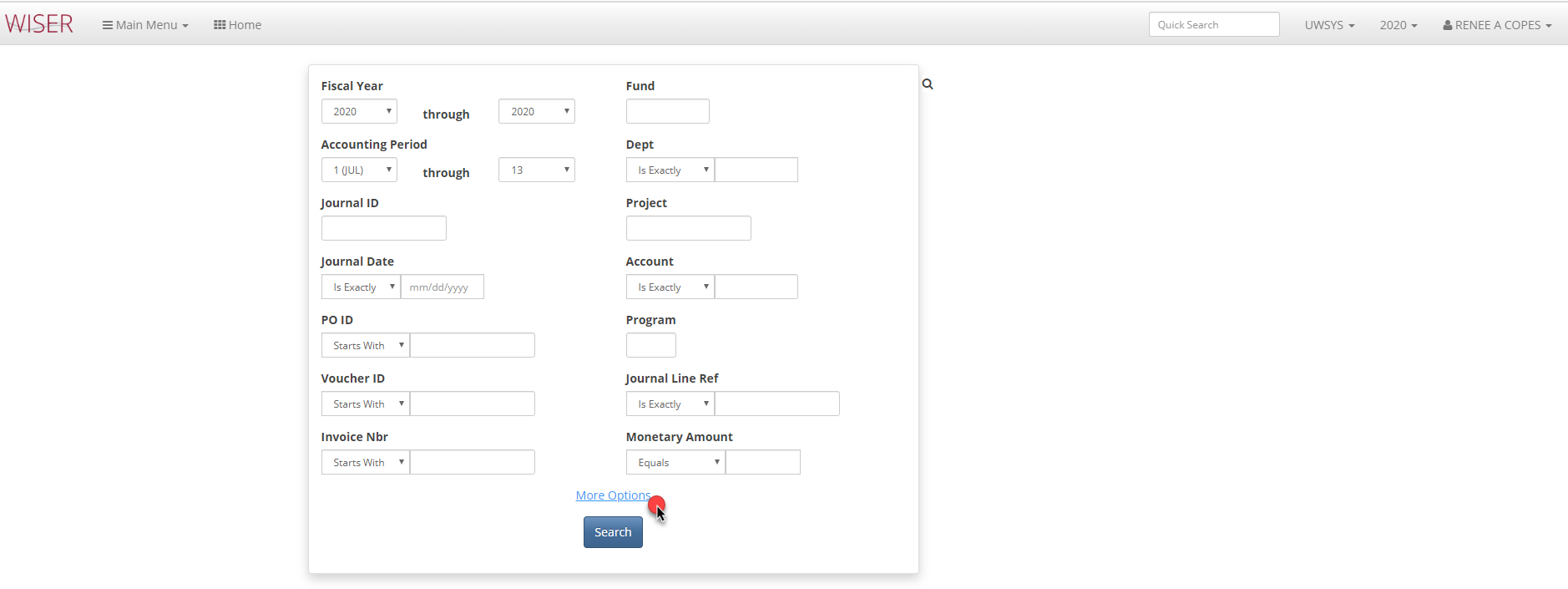
1. Page navigation
2. Hyperlink to Journal detail
3. Displayed detail options
   1. Export to Excel
   2. Customize columns
   3. Records per page
   4. Include Earn Dates

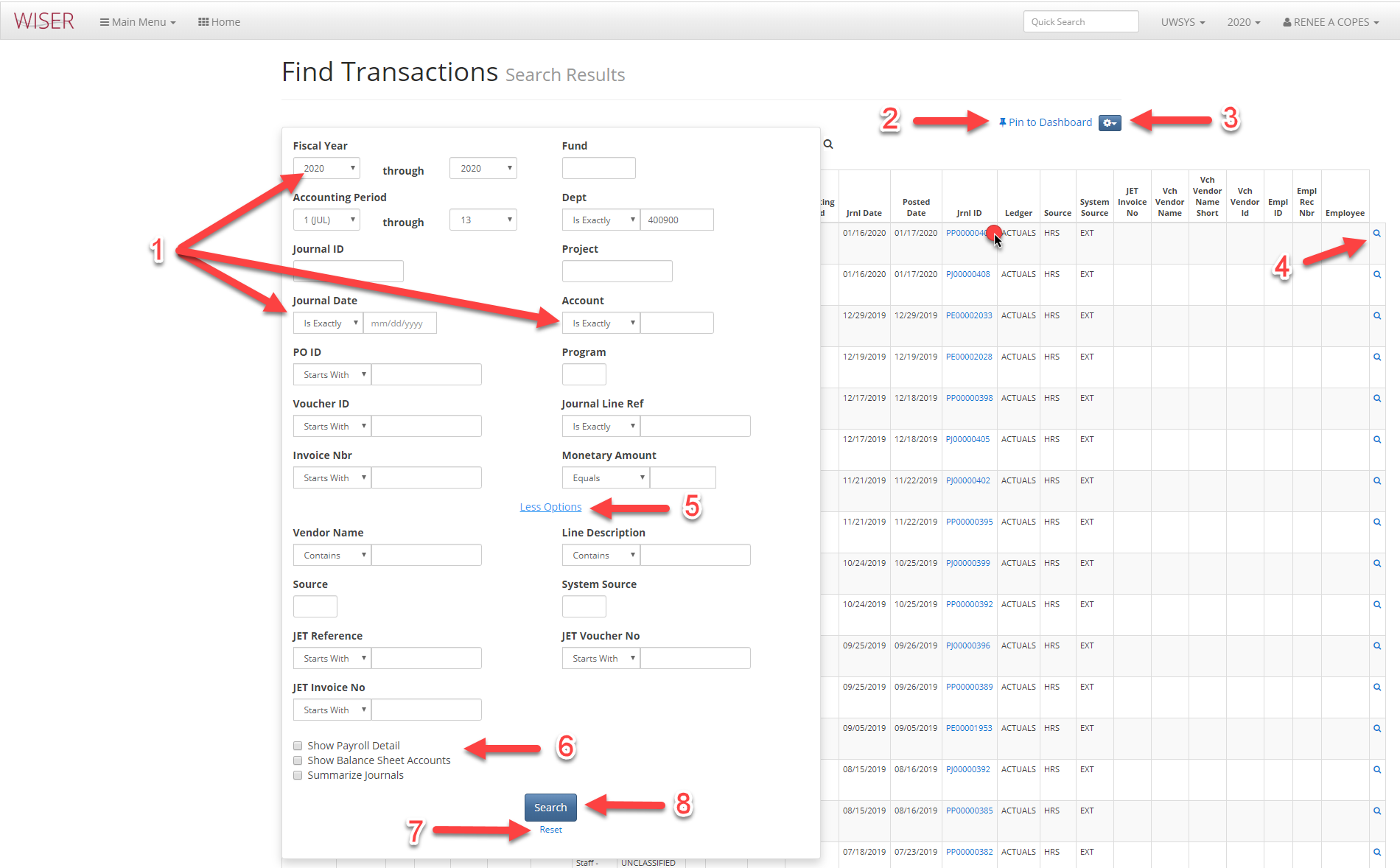


\*this final level of detail opens in new browser tab

1. Options for this page
   1. Pin to Dashboard (tile)
   2. Export to Excel

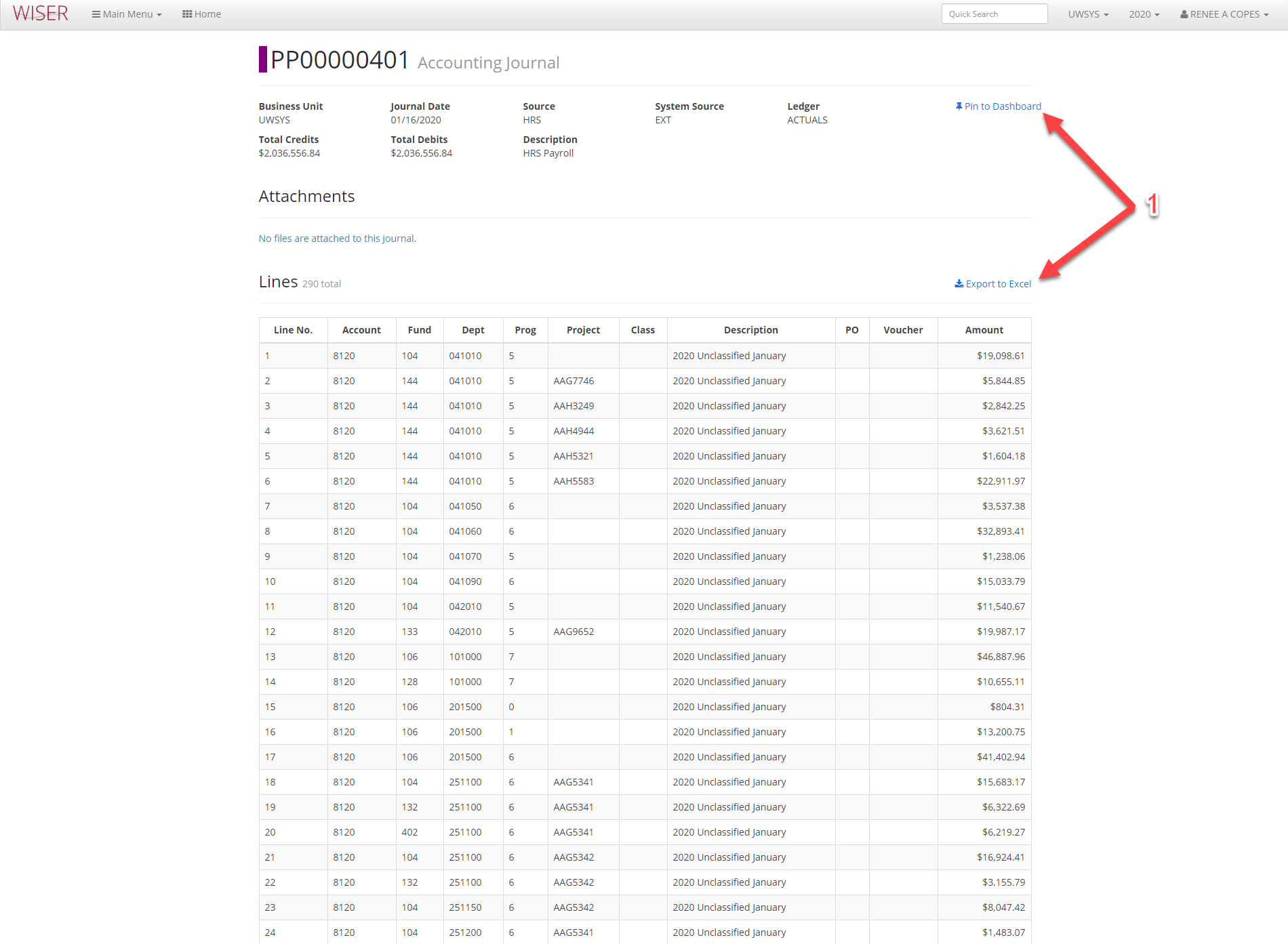
*Main Menu*

*Find Detailed Transactions*

*Detailed Transaction Search with Results*

\*search screen shown over results

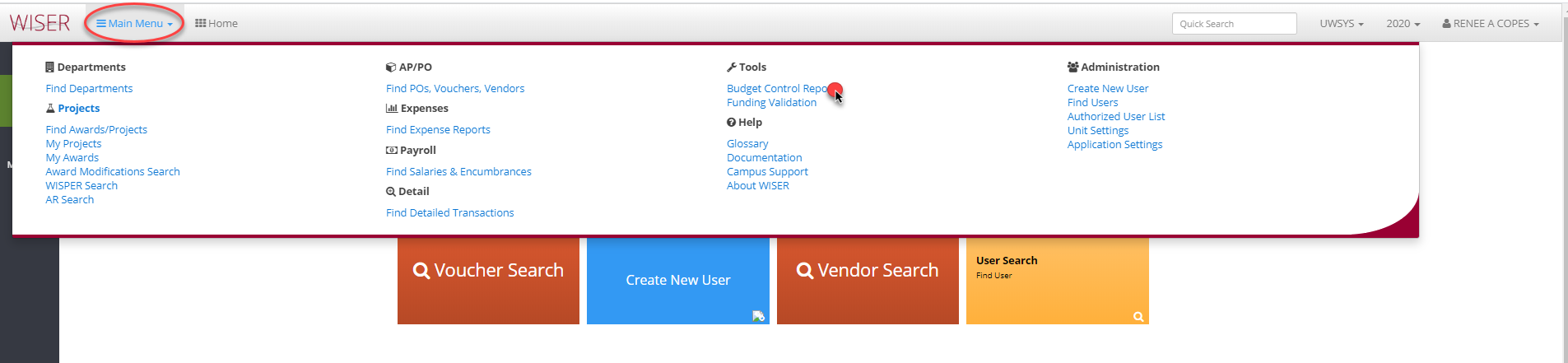
1. Enter criteria
   1. More criteria will narrow search
2. Pin to Dashboard (create tile)
3. More options
   1. Export to Excel
   2. Customize columns
      1. Select/deselect columns to include
      2. Reorder column display
      3. Revert to default
   3. Records to view per page
4. More Details (if available)

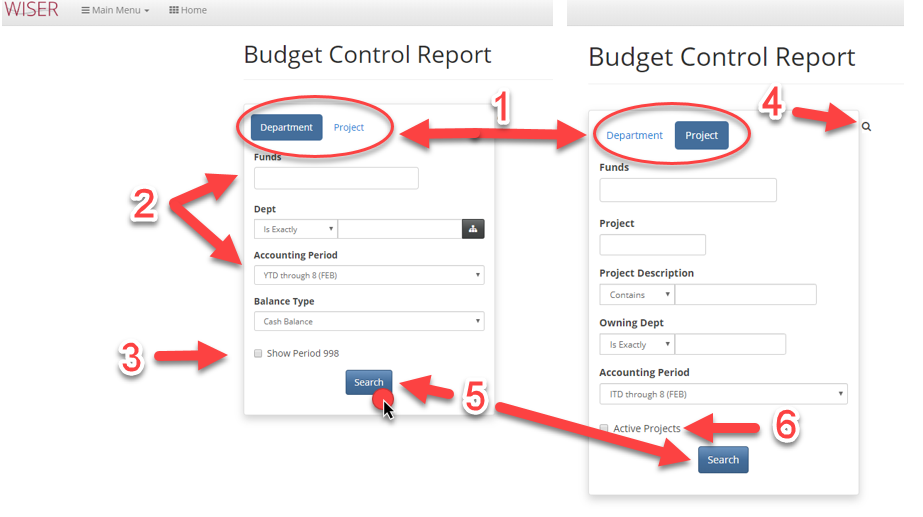
*Journal Detail*

\*last level of drill (detail) opens in new browser tab

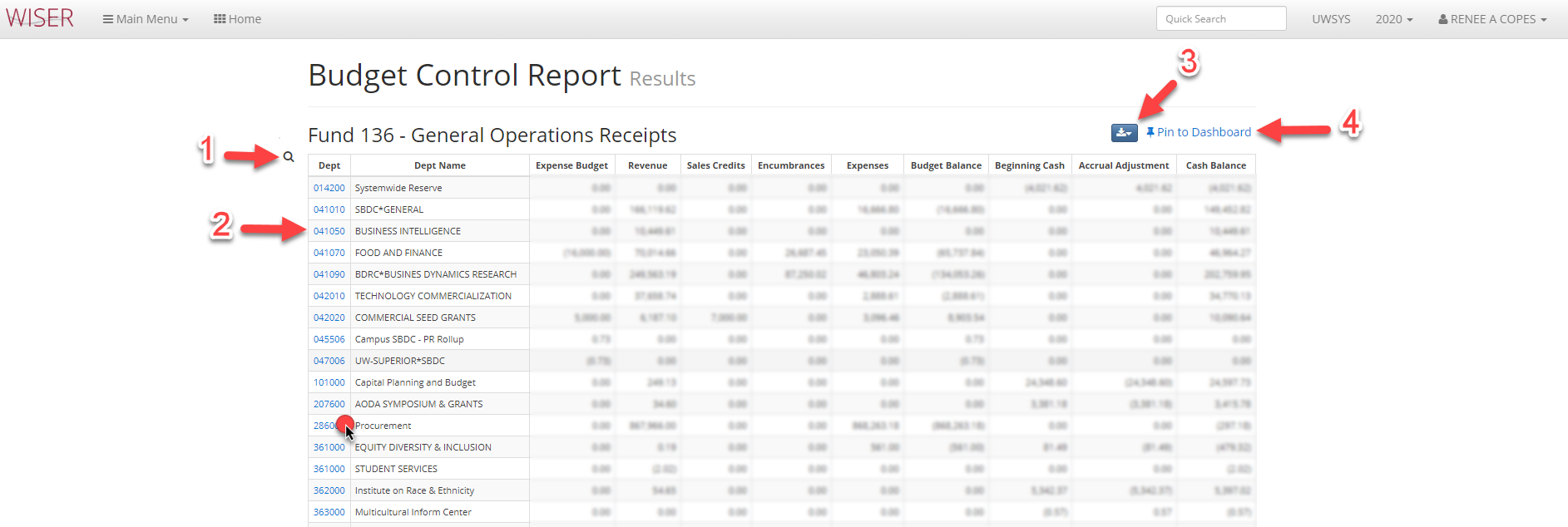
1. Available options for this Journal detail

*Man Menu*



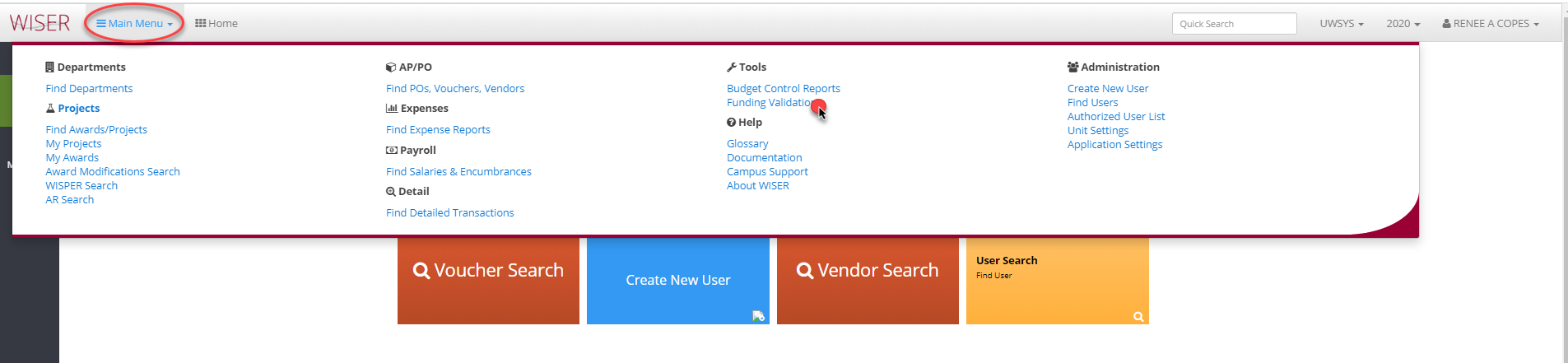
*Budget Control Reports*

1. Select option to create reports for Department or Project
2. Enter criteria
   1. More criteria narrows the search
3. Toggle Show Period 998
4. Toggle between criteria panel and results
5. Begin search with supplied criteria
6. Toggle for active projects

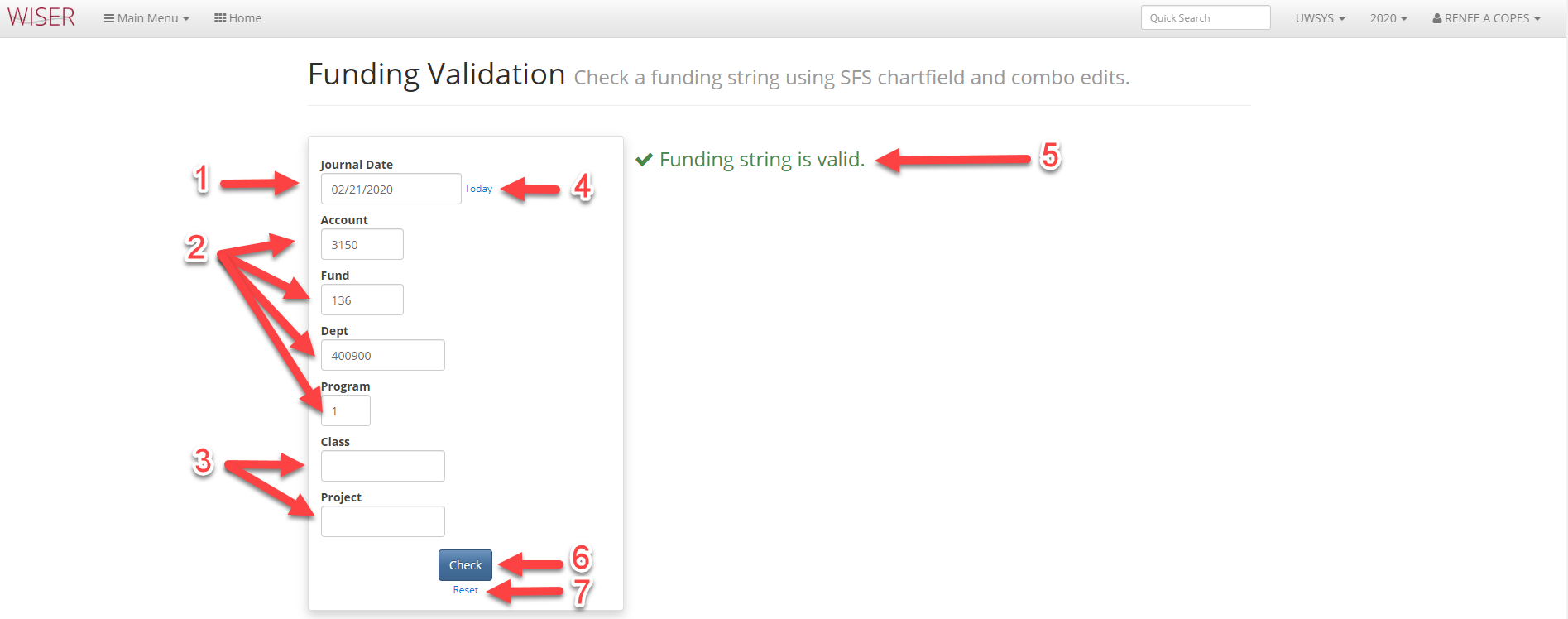
*Budget control Report Listing*

1. Toggle between criteria panel & results
2. Hyperlink to Department Summary Report
3. Export options
4. Pin to Dashboard (create tile)

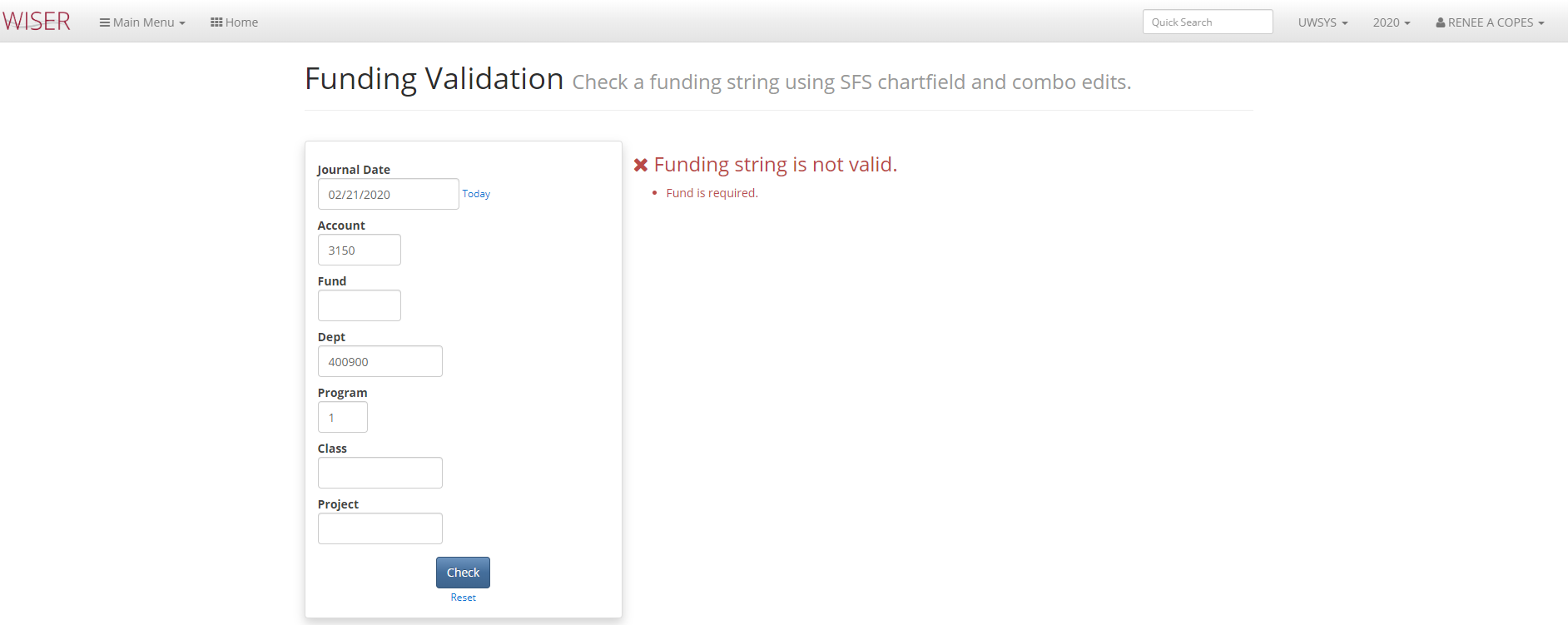
*Main Menu*

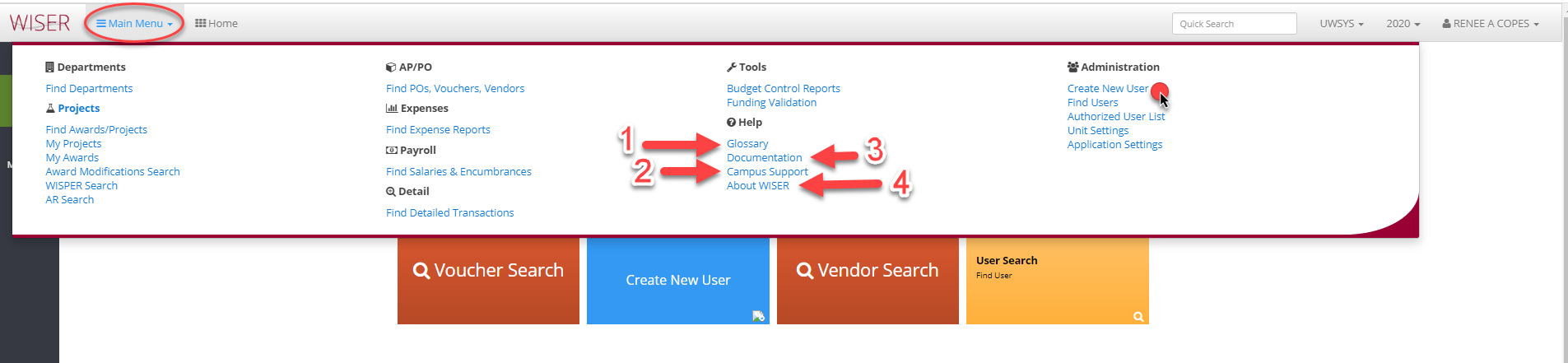


*Funding Validation*



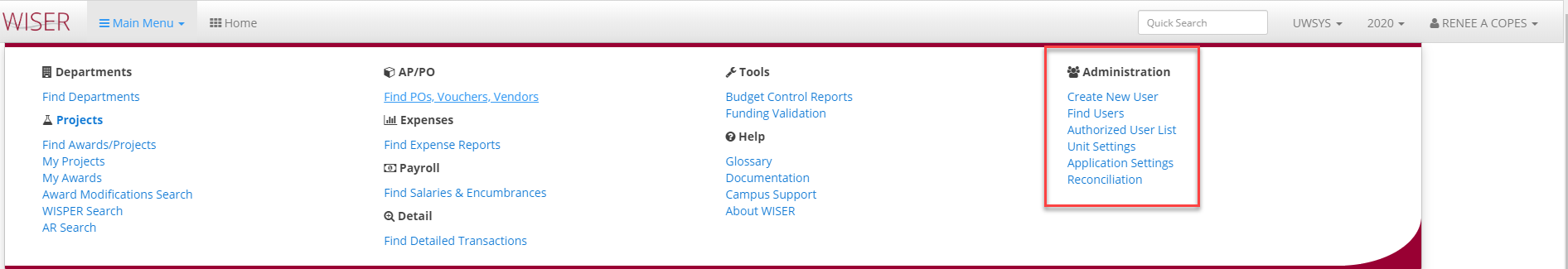
1. Enter Date of Journal
2. Mandatory entry fields
3. Optional entry fields
4. Update date to today
5. Validation message (example of invalid error message below)
6. Check if funding string entered is valid
7. Reset search criteria

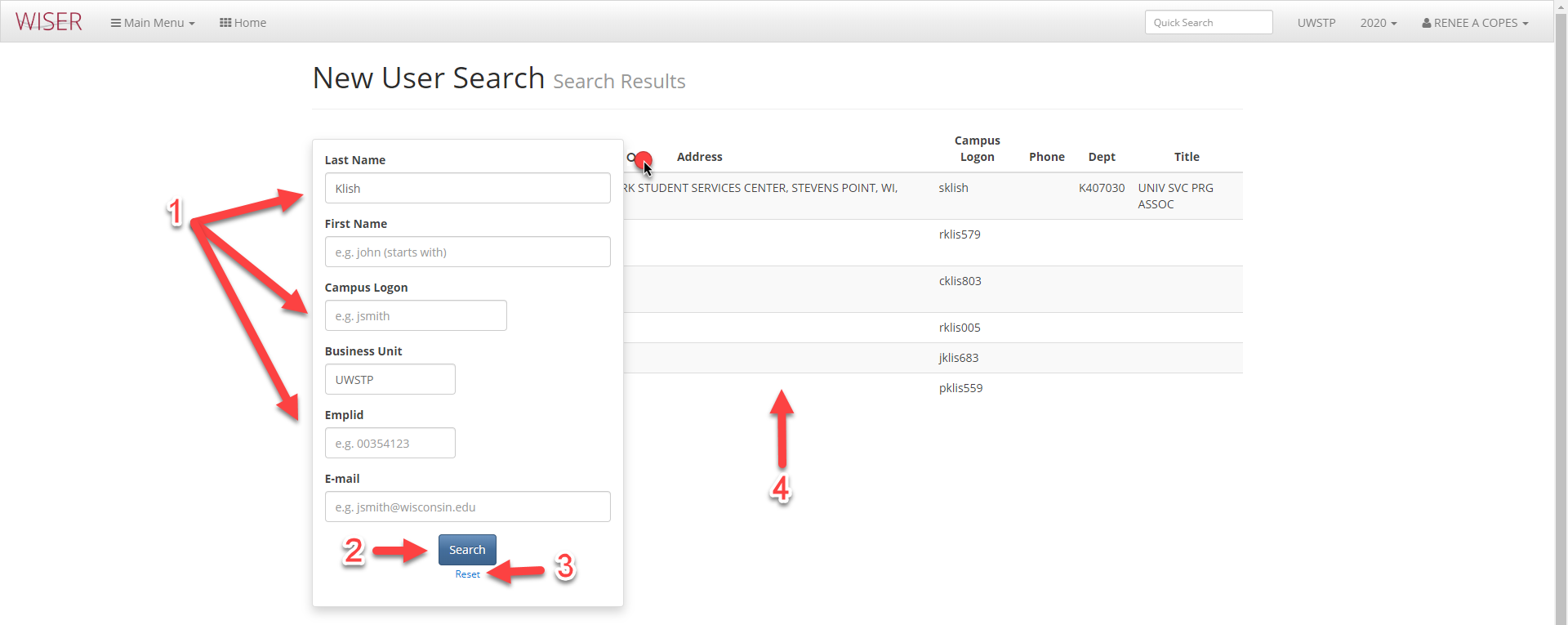
*Funding Validation with Error*

*Help Items*

1. Glossary – WISER terms & definitions
2. Campus Support – Listing of campus WISER support contacts
3. Documentation – link to SFS webpage containing WISER information
4. About WISER – Copyright and licensing details

**Administration tasks**

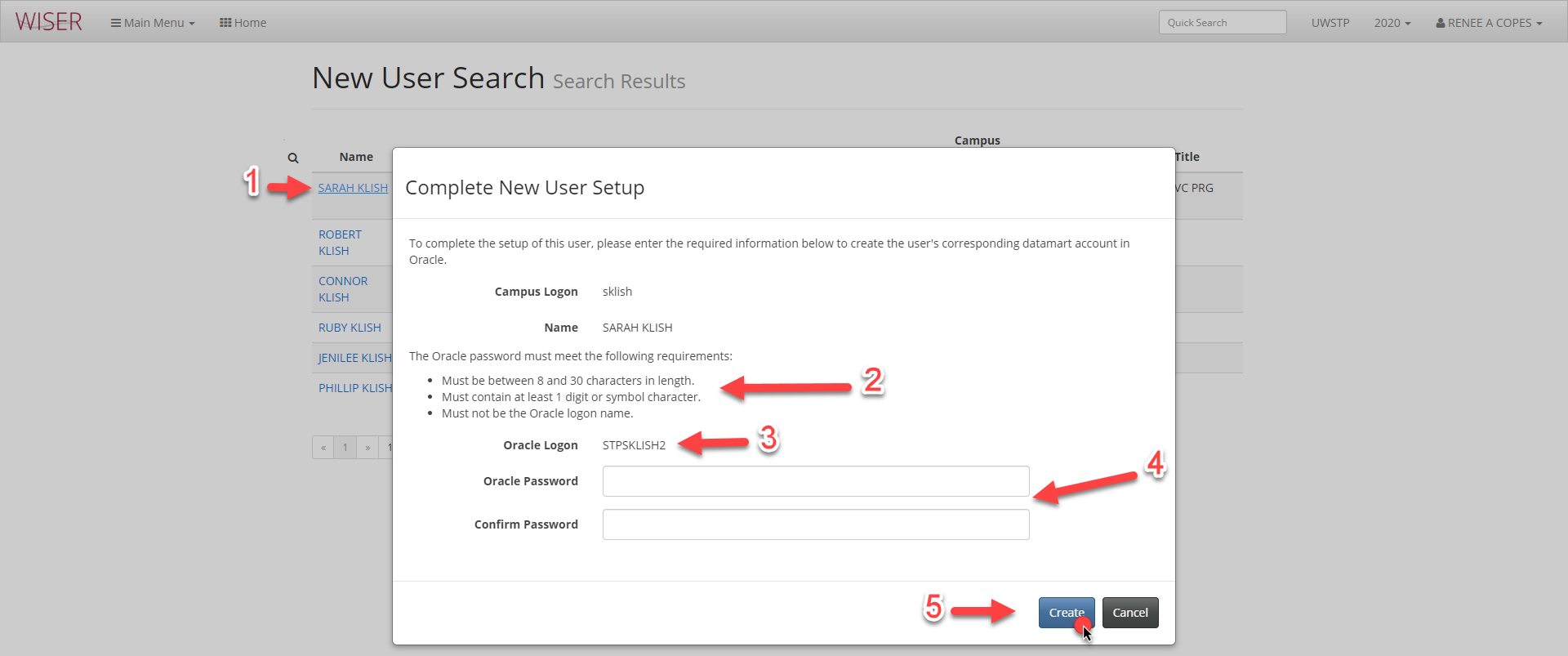


*Create User*

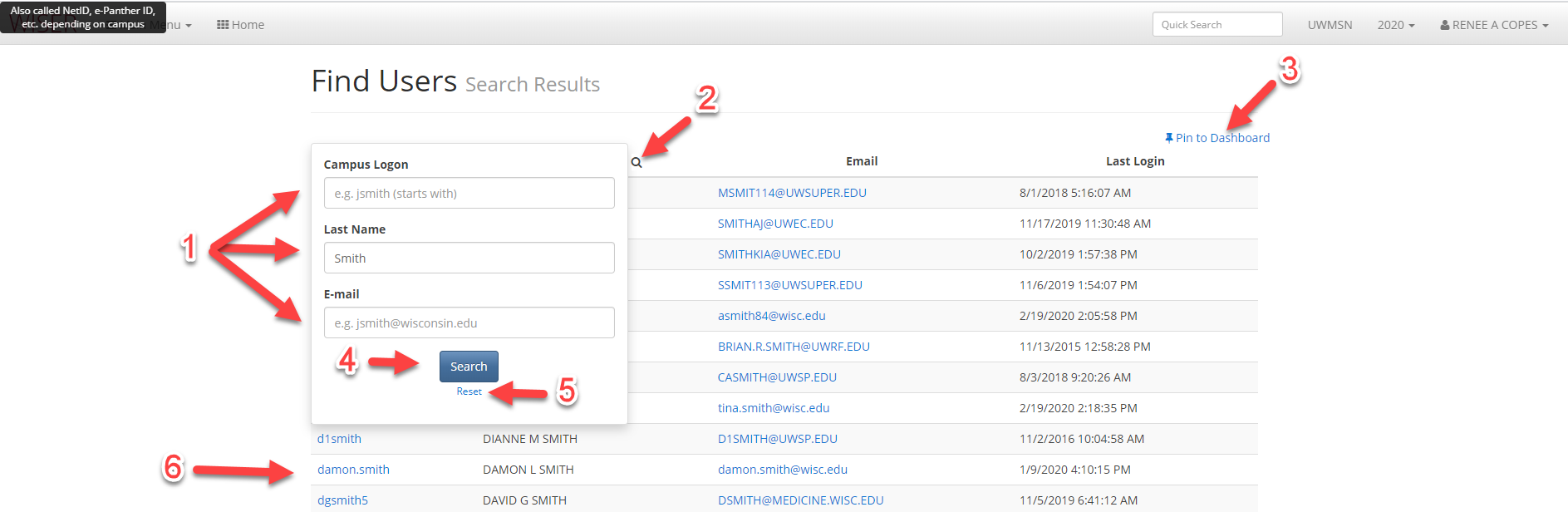
\*Search screen shown over results

1. Available search criteria fields
2. Begin search with criteria entered
3. Reset/clear search criteria
4. List of users matching supplied criteria

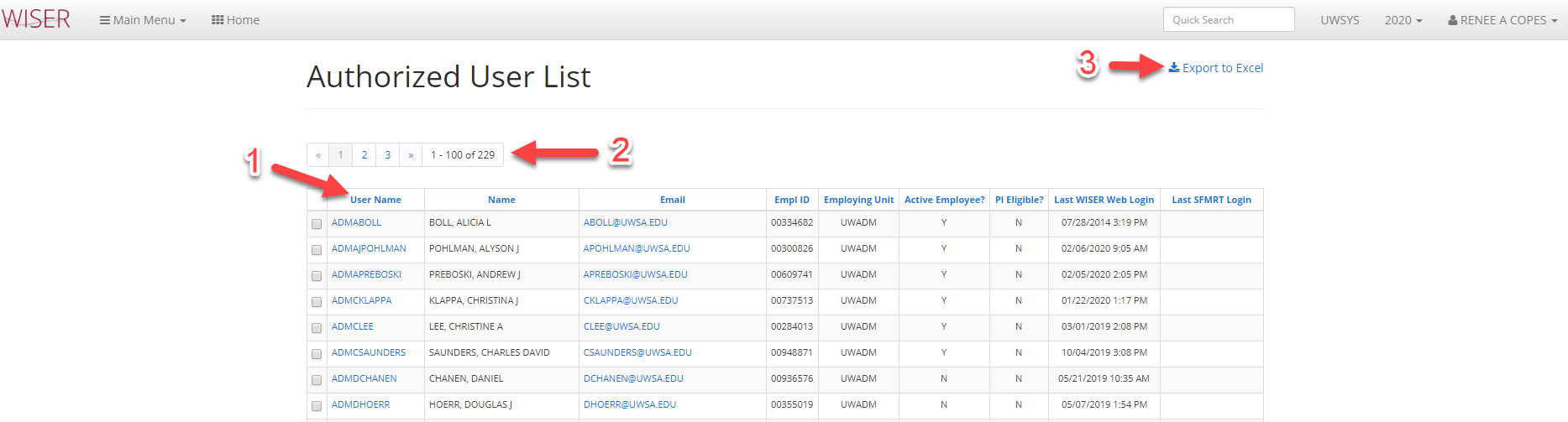
\*\*\*\*\*\*\*not yet available in WISER. Function will be moved to WISER when WISDM access removed\*\*\*\*\*\*\*

*Create User – User hyperlink in results selected*

1. Selected user
2. Password requirements (datamart)
3. Oracle logon created
4. Password entry & confirmation
5. Create or Cancel setup

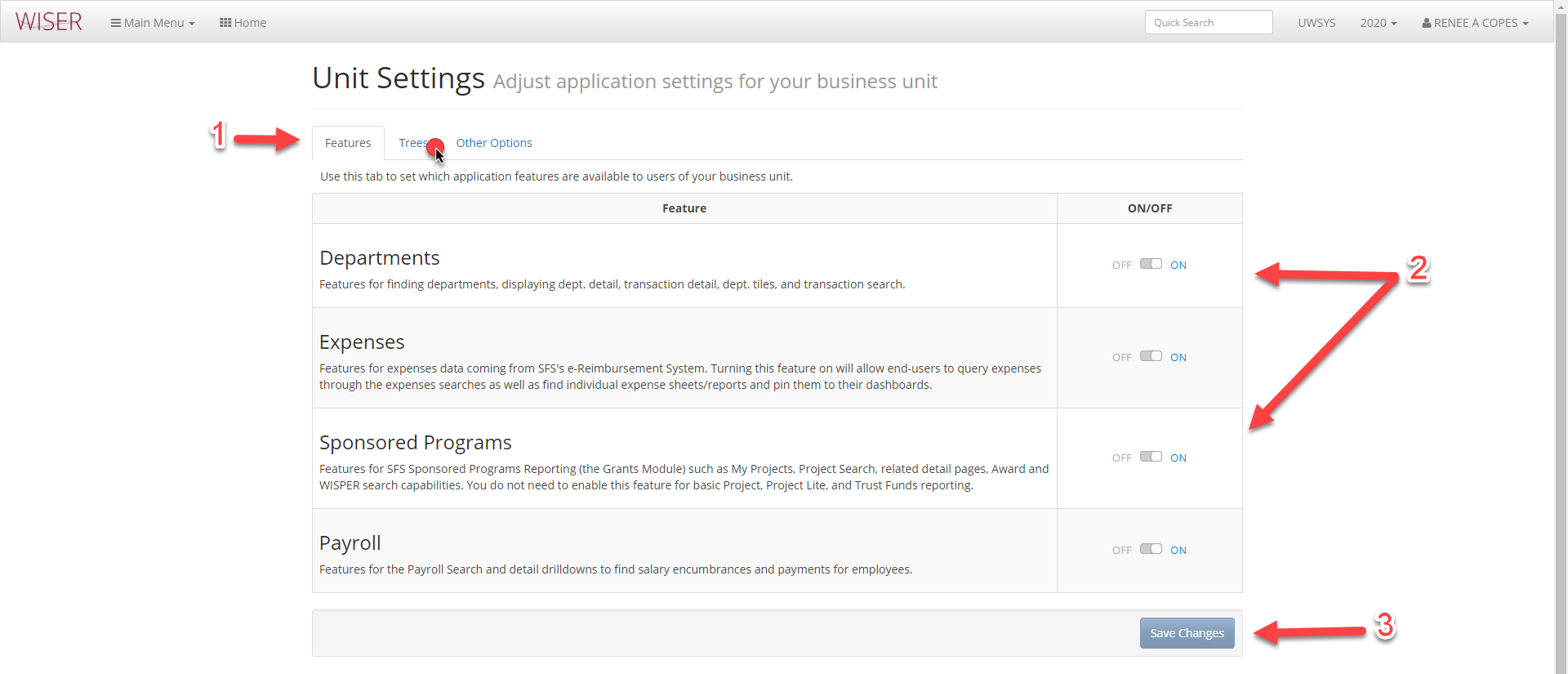
*Find Users*

1. Search Criteria
2. Toggle between Search Criteria screen & results
3. Pin search results to Dashboard (create tile)
4. Begin search with criteria entered
5. Reset search (clear criteria)
6. Result listing (Users matching search criteria used)

*Authorized User List*

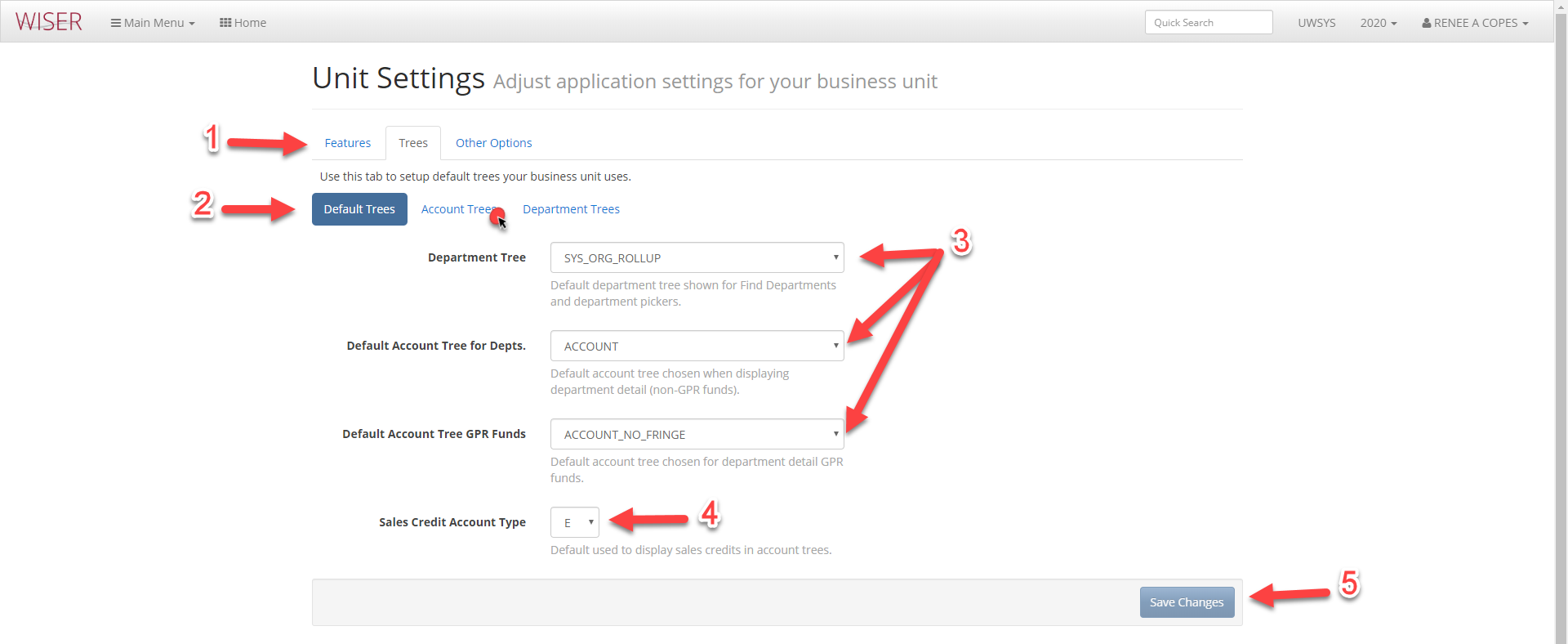
1. Column headings – click to sort by
2. Page navigation
3. Export

*Unit Settings-Features*

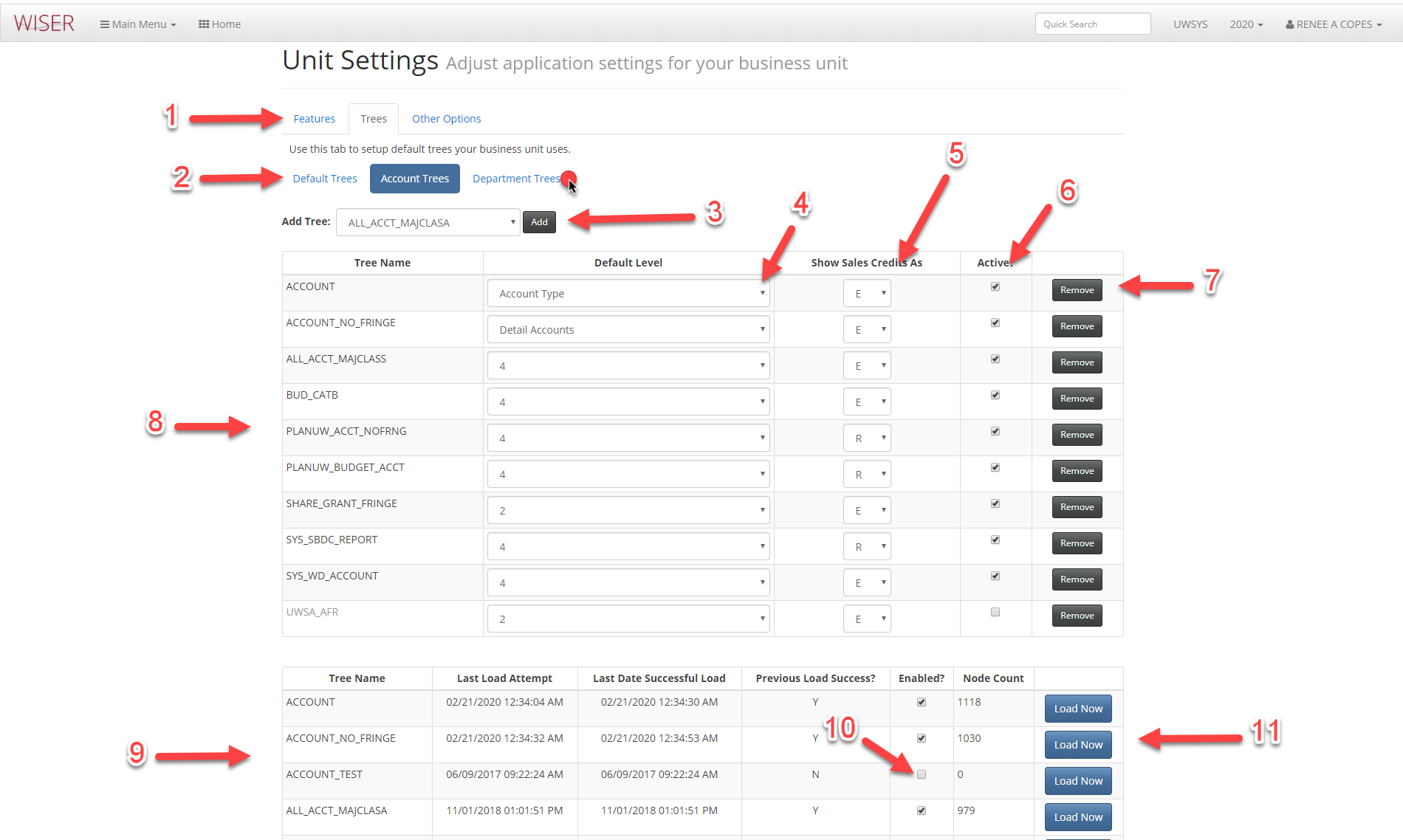


1. Unit Setting group navigation
2. Toggle features
3. Save

*Unit Settings-Trees-Default*

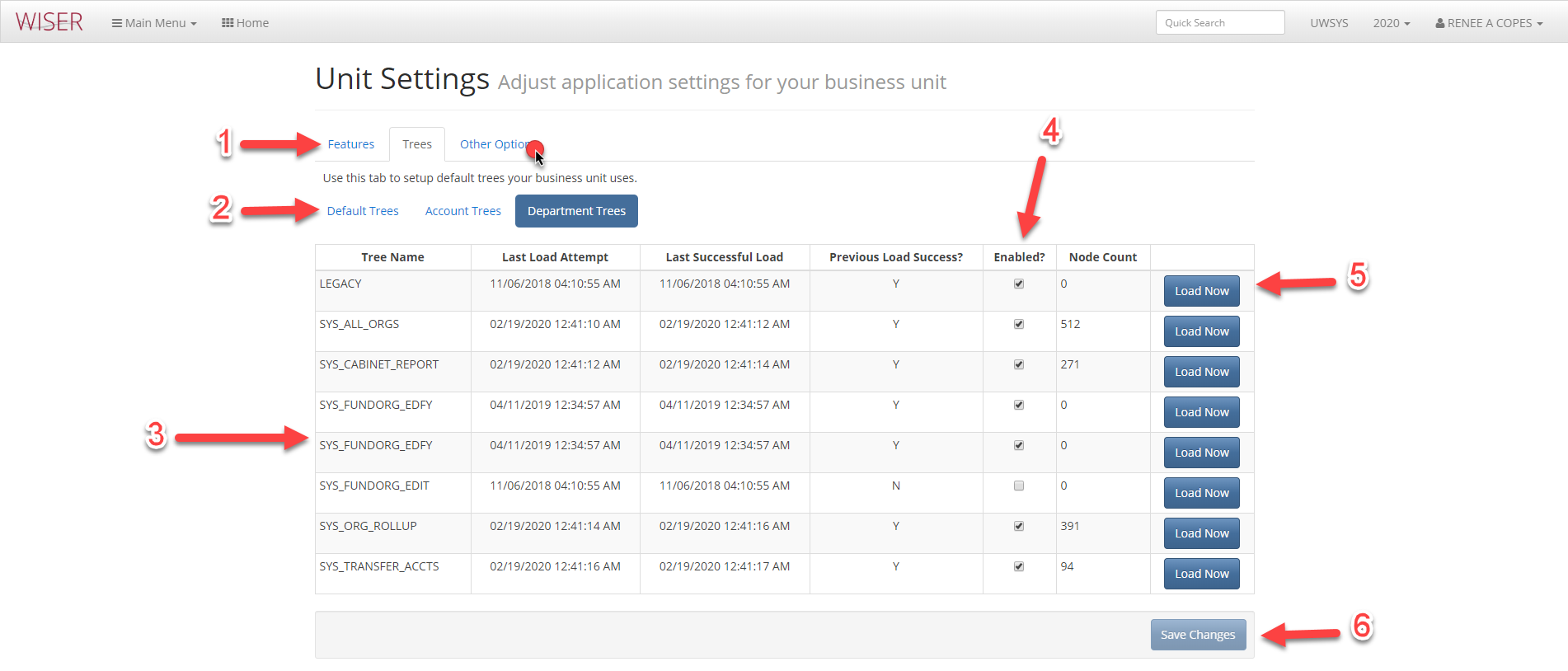


1. Unit Setting group navigation
2. Tree type setting navigation
3. Default Trees
4. Sales Credit – show as either Revenue or Expense
5. Save any changes made

*Unit Settings-Trees-Account*

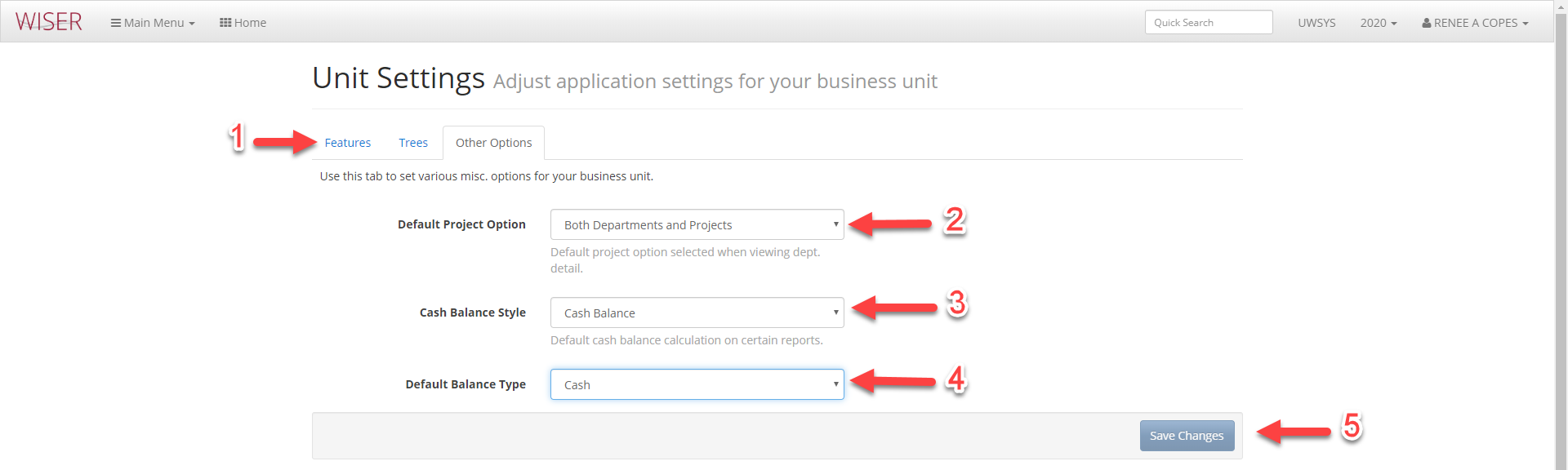
1. Unit Setting group navigation
2. Tree type setting navigation
3. Add Tree
4. Default level setting
5. Sales Credit – show as either Revenue or Expense
6. Toggle Active/Inactive
7. Remove Tree
8. Tree list
9. Tree load detail
10. Tree enabled toggle
11. Option to load tree now

*Unit Settings-Department Trees*



1. Unit Setting group navigation
2. Tree type setting navigation
3. Department Tree details
4. Enabled toggle
5. Load now
6. Save changes made

*Unit Settings-Other Options*



1. Unit Setting group navigation
2. Project view options
3. Cash balance calculation options
4. Default balance type
5. Save changes made

*Reconciliation*