Highlights of WISER Projects for Grants Management

- **Access WISER**
  - Through WISDM (WISER Projects menu option)
  - [https://www.rsp.wisc.edu/](https://www.rsp.wisc.edu/), Electronic Tools list on the right side of the page
  - Directly: [https://wiser.wisc.edu/](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**