BUSINESS SERVICES

WISDM FINANCIAL REPORTING INSTRUCTIONS

WISDM SET UP

Prepared by LTS Documentation
May 17, 2007

See the Business Services WEB Site for additional information and assistance.
http://www.uwec.edu/bussvs/univAcct/index.htm

University of Wisconsin - Eau Claire
WISDM Instructions - Getting Started:

The first time you log into WISDM, a link will need to be created between WISDM to IAA (Identification, Authentication and authorization). Follow these steps to create that link.

1. Open a web browser (e.g., Internet Explorer)
2. In the address bar, type this URL: https://wisdm2.doit.wisc.edu/wisdm2/
   A Security Warning dialog box appears.

   ![Security Warning Dialog]

   The current Web page is trying to open a site in your Trusted sites list. Do you want to allow this?

   Current site: https://wisdm2.doit.wisc.edu
   Trusted site: https://authhub.wisconsin.edu

   Yes  No

   Warning: allowing this can expose your computer to security risks. If you don’t trust the current Web page, choose No.

3. Click YES
   The UW System Authentication Hub webpage appears.

   ![UW System Authentication Hub]

   UW System Authentication Hub

   The UW System Authentication Hub is your gateway to UW System applications.

   Please select your home campus and application, and enter your campus username / Login ID.

   Campus: UW-Eau Claire (Username)
   Application: WISDM
   Username: weisegr
   Password: [field]
   Save my campus and username (recommended) [ ]

   Login

4. From the Campus pull-down list, select UW-Eau Claire (Username)
5. In the Username text box, type your UWEC username
6. In the Password text box, type your UWEC password
7. Select *Save my campus and username*
   The option is selected if a checkmark appears before it.

8. Click **LOGIN**
   The default WISDM page appears.
Customizing Your WISDM Screen

1. From the Main Menu, select Departments >> Search

The Search Criteria screen appears.

![Search Criteria](image)

- **Fund**
- **Dept** is exactly
- **Descr** is exactly
- **Manager** is exactly
- **Records Per Page** 50

2. In the Dept text box, type the 6-digit *department account number*

3. Click SUBMIT
   The *Summary Report* for that account appears.
4. To view the detail for any expenditure type, click a linked dollar amount. The Summary Detail for that item appears.

5. To customize the display for this page, click **PICK CUSTOM COLUMNS**
Pick Custom Columns

Check the columns you wish to see on the current page, then click "Update" to refresh the page with the new column view. You can also choose "Reset to Defaults" to revert your column profile to the default layout.

Update  Reset to Defaults

All Columns
- ChartFields
  - Fund
  - Dept
  - Project
  - Program
  - Acct
  - Sub-Class
- Chartfield Descriptions
  - Acct Descr
- Time
  - Accounting Period

6. From the list of available columns, select/deselect columns for your display. Items are selected and will display if a checkmark appears before them. So that AP, PO, and GL information is displayed, it is recommended that you select the following columns:

Fund
Program
Dept
Project/Grant
Acct
Acct Descr
Monetary Amt
Vchr Vendor Name
Line Descr
PO ID
Voucher ID
Journal Line Ref
Journal ID
Journal Date

7. Click **UPDATE**
8. To reorder the columns from left to right, click the arrow in the column header representing the direction in which you want to move the column. The recommended layout order is shown here:

<table>
<thead>
<tr>
<th>Fund</th>
<th>Proj</th>
<th>Dept</th>
<th>Project/Grant</th>
<th>Acct</th>
<th>Acct Desc</th>
<th>Monetary Amt</th>
<th>Veh Vendor Name</th>
<th>Owner</th>
<th>PO</th>
<th>Vehr ID</th>
<th>Invl Line Ref</th>
<th>GL</th>
<th>Invl ID</th>
<th>Invl Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>102</td>
<td>1</td>
<td>024001</td>
<td>LTESTU LTE/Student</td>
<td>1.500.00</td>
<td>FY07 BUDGET ALLOCATION EC1030</td>
<td>C05011</td>
<td>B02822971</td>
<td>9/22/2006</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>102</td>
<td>1</td>
<td>024001</td>
<td>LTESTU LTE/Student</td>
<td>900.00</td>
<td>FY07 BUDGET ALLOCATION EC1522</td>
<td>C05011</td>
<td>B02822971</td>
<td>9/22/2006</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>2.400.00</td>
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</table>

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