

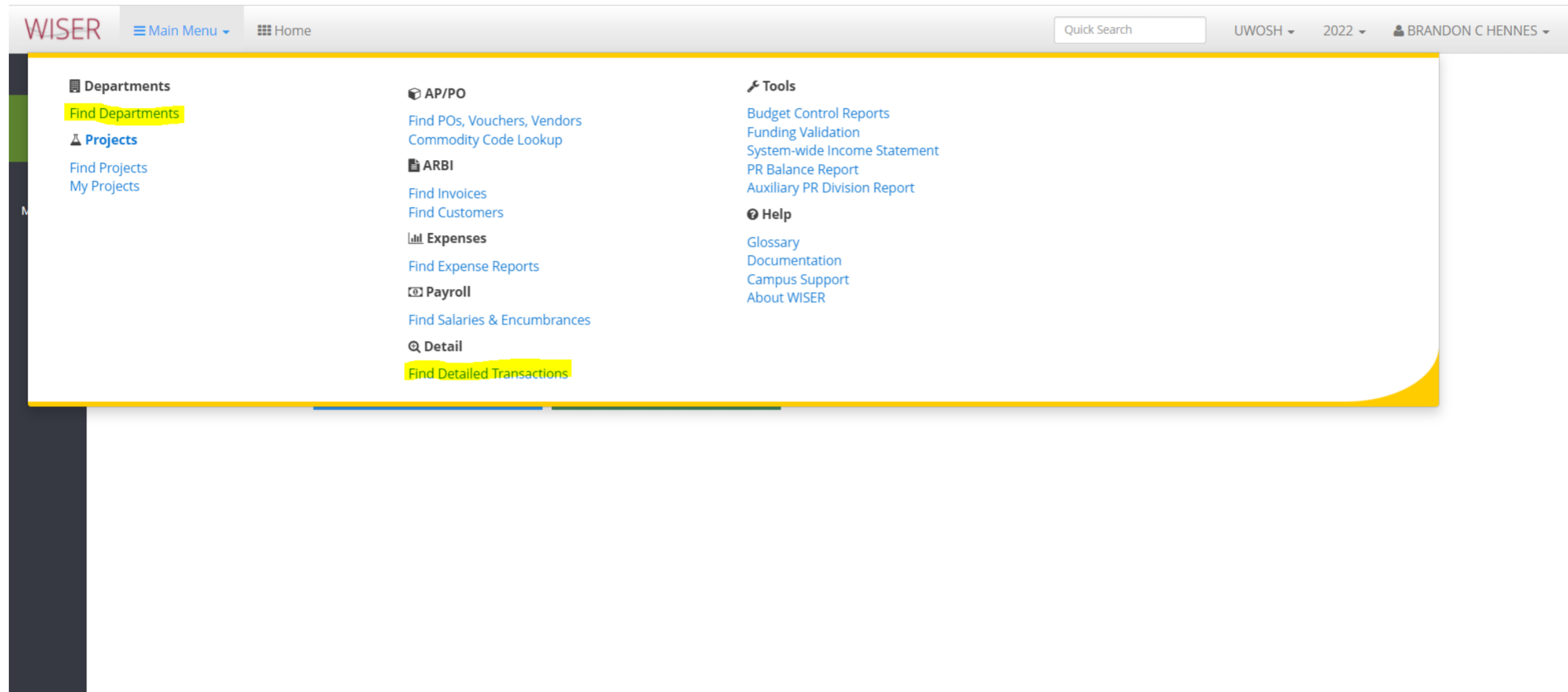
COST TRANSFER TOOL - CREATING COST TRANSFERS FROM WISER

This article outlines the steps for starting a cost transfer in the Cost Transfer Tool from WISER.

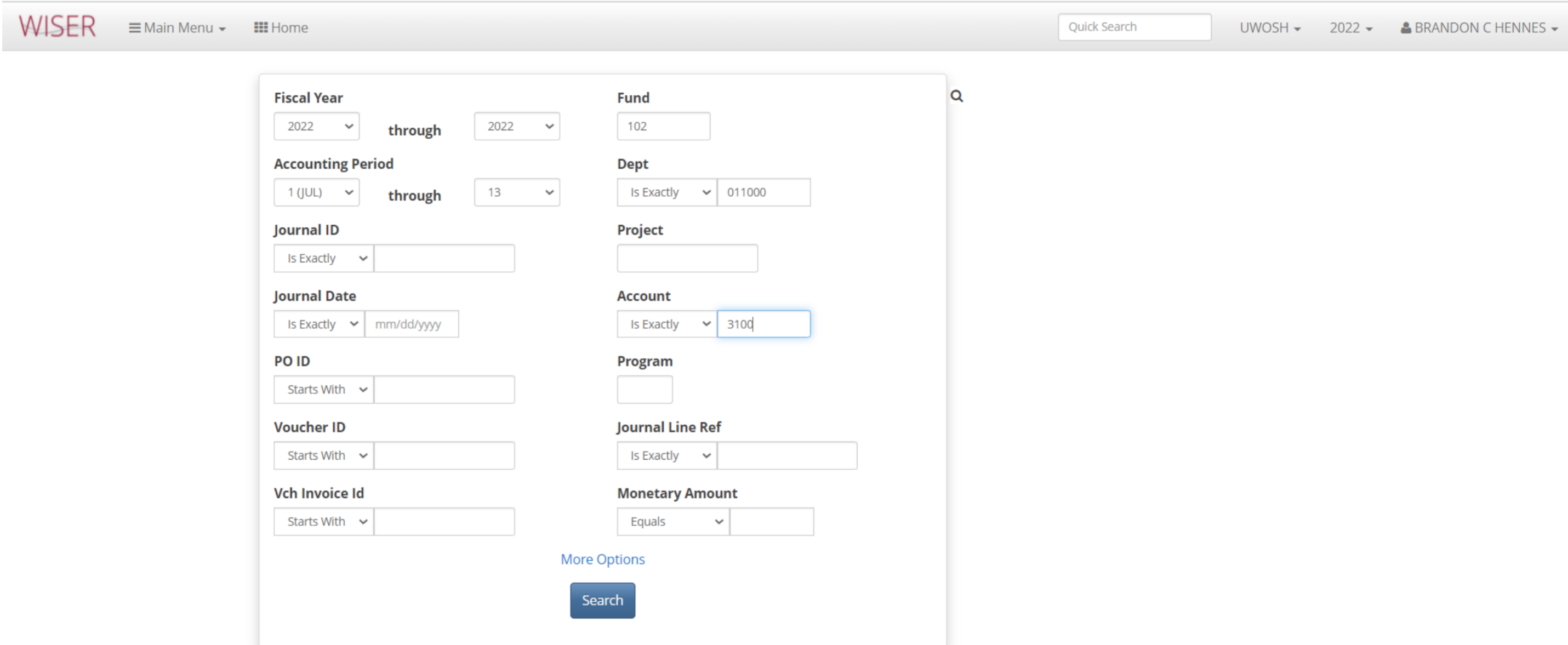
A transfer can be initiated right from WISER. The transaction is loaded into Cost Transfer Tool using the basic metadata from WISER. This allows users to initiate a transfer when they see the need in the system where they are examining data from rather than looking in WISER and then repeating the same search in Cost Transfer Tool. This works for Salary Cost Transfers and Non-Salary Cost Transfers.

1. First, log into WISER <https://wiser.wisc.edu/>.

2. Find expenses to be transferred using either the "Find Departments" page or the "Find Detailed Transactions" page:



3. If using the "Find Detailed Transactions" page, enter criteria to search for and click "Search"



4. When the search results are presented, there will be a magnifying glass in the far right column that can be clicked to initiate a cost transfer:

Find Transactions Search Results

Pin to Dashboard

« 1 » 1 - 186 of 186

Monetary Amt	Enc Amount	Fund	Dept	Project	Program	Account	Acct Descr	Line Descr	PO Id	Voucher Id	Vch Invoice Id	Accounting Period	Jrnl Date	Posted Date	Jrnl ID	Ledger	Source	System Source
\$0.00	\$94.79	102	011000		1	3100	Supplies		OSH0002304			4	01/01/1900			CC_EXP	KK	
\$0.00	\$-0.09	102	011000		1	3100	Supplies		OSH0001940			4	01/01/1900			CC_EXP	KK	
\$0.00	\$-3.81	102	011000		1	3100	Supplies		OSH0001940			4	01/01/1900			CC_EXP	KK	
\$0.00	\$-0.10	102	011000		1	3100	Supplies		OSH0001940			4	01/01/1900			CC_EXP	KK	

5. This will bring up the option to create a transfer from the transaction in the Cost Transfer Tool:

Results Found!

Other apps found information:

Cost Transfer Tool

This transaction has not been involved in a transfer yet; click to begin the process of transferring it to new funding.

[Close](#)

6. If using the department page, use the tree to find the department or UDDS account that you're looking for:

Find Departments Identify department entities for financial detail

Search

- ALL_ORGS - All Orgs
 - 000000 - No Udds Match-Pr*No Udds Match
 - 01 - CHANCELLOR
 - 0110 - Chancellors Office
 - 011000 - CHANCELLOR'S OFFICE
 - 011002 - Institutional Support Fund
 - 011005 - UWCU Scholarship Support
 - 011007 - CLASS GIFT-Commencement Stage
 - 011009 - UW SYS Public Records Trng
 - 011010 - Chancellors Housing Allowance
 - 011015 - CLS STF DEV & APPR DAY
 - 011018 - UW System - Civility Workshops
 - 011020 - Chancellor's Office STEP
 - 011060 - UWU Retirees Association
 - 011070 - LICENSE PLATE SCHOLARSHIP PROG
 - 011082 - FALL FEST
 - 011089 - BOARD OF REGENTS CAMPUS VISIT
 - 011090 - Chancellors Spec Events/Intrst
 - 0113 - Institutional Memberships
 - 0118 - Asst to Chanc-Affirm Action
 - 0180 - Oshkosh Sports Complex
 - 0183 - Intercollegiate Athletics
 - 0185 - Summer Camps & Clinics
 - 0187 - Men's Athletics
 - 0188 - Women's Athletics
 - 02 - ACADEMIC AFFAIRS

Selected Departments 1 selected

- 011000 - CHANCELLOR'S OFFICE - Bonlender, Malissa

Funds [uncheck all](#) | [check GPRs](#) | [check non-GPRs](#)

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[Run Query](#)

7. Once at the department page, drill into detail in the actuals column by clicking on a link in that column:

011000 CHANCELLOR'S OFFICE

Export Pin to Dashboard

Manager Bonlender, Malissa

Funds:

102 Options

Period:

YTD thru 6 (Dec)

Program:

All

Projects:

Exclude

Financials Summary

Single Year Multi Year

Least Detail

Account	Budget	Dec	Actuals	Encumbrances	Balance
REVENUE					
TOTAL	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
EXPENSES					
Expenses					
Salary Permanent	\$576,513.00	\$0.00	\$228,538.44	\$0.00	\$347,974.56
LTE/Student	\$2,065.00	\$0.00	\$4,164.00	\$0.00	\$-2,099.00
Fringe Benefits	\$0.00	\$0.00	\$75,243.79	\$0.00	\$-75,243.79
Supplies & Expense	\$43,295.01	\$773.45	\$11,977.36	\$7,902.16	\$23,415.49
TOTAL	\$621,873.01	\$773.45	\$319,923.59	\$7,902.16	\$294,047.26

8. Once drilled down, scroll all the way to the right to find the magnifying glass:

Financials Summary

Single Year Multi Year

Least Detail

Account	Budget	Dec	Actuals	Encumbrances	Balance
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Transaction Detail - totaling \$11,977.36

Line	Ledger	Off Cycle	PO Buyer	PO Date	PO Id	PO Ref	PO Vendor BU	PO Vendor Id	PO Vendor Name	PO Vendor Name Short	Pay Period	Pay Run Descr	Pay Run ID	SCT ID	Scenario	Source	System Source	Vch Business Unit	Vch Invoice Id	Vch Vendor Id	Vch Vendor Name	Vch Vendor Name Short	Vch Vendor Setid	Voucher Id	
	ACTUALS	N		01/01/1900								NON-PAYROLL		0		EX	GEX								Q
	ACTUALS	N		01/01/1900								NON-PAYROLL		0		EX	GEX								Q
	ACTUALS	N		01/01/1900								NON-PAYROLL		0		EX	GEX								Q

9. Clicking this icon will give you the option of sending the expense to the Cost Transfer Tool to initiate a transfer:

Results Found!

Other apps found information:

Cost Transfer Tool

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[Close](#)