

<b>University of Wisconsin - Milwaukee</b> <b>Grants Project Desk Reference</b> <b>WISPER – Supplement for School/College Administrators</b>
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## **WISPER – Supplement for School/College Administrators**

WISPER facilitates the process of routing applications and agreements for extramural support by capturing the necessary data up and tracking through the generation of the award. As a School/College Administrator, you may be asked to respond to a request for approval by reviewing and approving a WISPER record and/or request an additional approval for a record. This document will walk through these and other relevant processes.

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**\*\* Please note that there are two items that are not yet working properly for Milwaukee. One is the "Outside Activities Report Submitted" indicator that will show "No" for everyone whether or not an OAR has been filed and currently should be ignored. The second item is that all of the WISPER on screen help currently goes to Madison's version of the help documents. The Milwaukee version of the help documents is on our website, <https://uwm.edu/officeofresearch/wisper/> but not yet hooked up to the WISPER screens. Both of these items should be cleared up within the next few days. (02/25/08)**

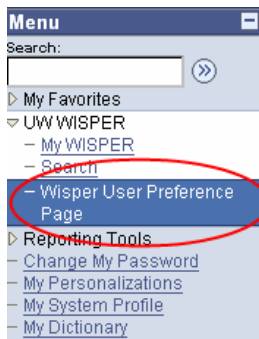
## User Preferences

The User Preferences page is accessible to all users and allows the selection of a delegate and management of email notifications.

- Delegate selection: You are able to choose another employee on campus to receive notifications that are also sent to you and to access records to which you have security. Your delegate will receive emails every time WISPER triggers an email to you notifying the delegate of routing or approvals (Note: signatures of the PI and Division (School/College) Role Member can not be delegated).
- Email notifications: WISPER email notifications, which are sent when records are routed to a user or when the user is added as an approver, can be turned on or off by selecting or unselecting the email checkboxes.

### 1. Login:

1. Navigate to the WISPER login page via <https://uwm.edu/officeofresearch/wisper/> and enter your PantherID and password. You will be directed to the UW WISPER page.
2. Click on the Wisper User Preference Page menu item. You will be automatically taken to a page displaying your current user preferences.



## Wisper User Preference Page

**Wisper User** 00007189

### User Delegate

Add User Delegate

Remove Delegate

Receive WISPER Email Updates

Receive WISPER Email on Route of Record

Receive WISPER Email on Approval Request

Save

## 2. Select Delegate:

1. If you would like to add a delegate, click the “Add User Delegate” button. This will launch the employee search page where you can select the employee who will serve as your delegate.
2. Search by entering any part of the campus employee name or their Department.
3. Select the delegate by clicking on their name.
4. The selected delegate can be changed by clicking “Change User Delegate” or deleted by clicking “Remove Delegate.”

<b>Wisper User</b>	00007189	
<b>User Delegate</b>	00424934	HARRIS,DAVID
	<a href="#">Change User Delegate</a>	<a href="#">Remove Delegate</a>

## 3. Change Email Notifications:


All email notification preferences will default to be checked for all users. Unchecking each of the boxes will turn off certain email notifications to you. Note the email will still be delivered to your delegate (if you have one) even if your emails are turned off.

1. Receive WISPER Email Updates: Turns on or off all emails generated by the WISPER system.
2. Receive WISPER Email on Route of Record: Turns on or off emails generated when records are routed to the WISPER user.
3. Receive WISPER Email on Approval Request: Turns on or off emails generated when an approval is requested of the WISPER user.
4. Click the “Save” button.

Receive WISPER Email Updates

Receive WISPER Email on Route of Record

Receive WISPER Email on Approval Request

 Save

Click on the MY WISPER Menu item to return to activity in the system.

## WISPER - Respond to Request for Approval

When an approval is requested, an email notification is sent to the approver and the record will appear on that user's MY WISPER worklist in the "Approvals I Need to Complete" section. Any participant can respond to the request, not just the requested approver.

Responses available to the approver include:

1. Approve
2. Deny
3. Submit Comments Only

WISPER captures all actions performed on the Approvals Page and the History page.

The following steps will guide you through the process of responding to a request for approval:

### 4. Login and Select Record:

1. Navigate to the WISPER login page via <https://uwm.edu/officeofresearch/wisper/> to enter your user ID and password.
2. Locate the record on which an approval is to be responded.
3. If it is on your MY WISPER worklist (Approvals I Need to Complete), select the record.
4. If it is not on your MY WISPER worklist, you can also select the Search link at the bottom of the page, search for and select the record.

### 5. Review Approval Request

- a. Select the Approvals tab, to open the main Approvals page.
- b. Click the "Details" hyperlink to the right of the Approval to which you are responding. This will open the Approval Detail page.

c.

General	Projects	Approvals	Attachments	SPO Action	Terms & Cond	Document History
<b>Record ID</b>	MIL101874	<b>Document Type</b>	Grant	<a href="#">Wisper Help</a>		
<b>Contact PI</b>	HARRIS,MARK T	<b>Sponsor Name</b>	US DEPT OF HEALTH & HUMAN SERVICES			
<b>Short Title</b>	Demo for Desk Reference	<b>Status</b>	1-In Process			

[Add Approval](#)

Requested Approvals						
Type	Requested	Requested By	Requested Approver	Actual Approver	Action	Details
Request Advance Award Setup	01/23/08 2:44PM	Harris, Mark	48-College of Letters & Science	KISSINGER,PATRICIA L	Approved	<a href="#">Details/Comments</a>
Revised Budget	01/23/08 4:40PM	Harris, Mark	48-College of Letters & Science			<a href="#">Details</a>

## 6. Approve, Deny, Submit Comments on Approval

The Approver has the choice to (1) *approve*, (2) *deny*, or (3) *submit comments only* on the requested approval. A *submit comments only* response stores the comments, but leaves the item on the user's worklist for possible future action. The approver or any other participant can return to the record to enter responses 1, 2, or 3 at any time. After being approved or denied, a record will still have the "Submit Comments Only" button active for additional comments to be added at any time.

- 1 Enter comments if applicable
- 2 Click the appropriate response to the request. This action will close the Approvals Detail page and return to the main Approvals page.

### Approvals

<b>Requested By</b>	Harris, Mark	<b>Request Date</b>	01/23/08 4:40PM	<b>Sequence</b>	2
<b>Approval Type</b>	Revised Budget				
<b>Approval Request</b>	Submission of a revised budget to this record. Please approve and ensure submission...				
<b>Approver Type</b>	Division	<b>Business Unit</b>	UWMIL		
<b>Requested Approver</b>	48-College of Letters & Science	<input type="button" value="Add Approval"/>	<input type="button" value="Cancel"/>		
<b>Respond to Approval</b>					
	<input type="button" value="Submit Comment Only"/>	<input type="button" value="Approve"/>	<input type="button" value="Deny"/>		
<b>Comment</b>	<input type="text"/>				
<b>Commenter</b>	<b>When</b>	<b>Comment</b>			
1					

To review the Approval or submit more comments, the Approval details page can be accessed by clicking the Details/Comments hyperlink from the main Approvals page.

## ADDITIONAL REQUESTS FOR APPROVAL

### 7. Approval:

To request additional approvals, you will need to “Add an Approval.”

- 1 Navigate to the Approvals Tab
- 2 Click the “Add Approval button.” This will open the details page.

General	Projects	Approvals	Attachments	Division Action	SPO Action	Terms & Cond	Document History
<b>Record ID</b>	MIL101873	<b>Document Type</b>	Grant		<a href="#">Wisper Help</a>		
<b>Contact PI</b>	HARRIS,MARK T	<b>Sponsor Name</b>	US DEPT OF HEALTH & HUMAN SERVICES				
<b>Short Title</b>	Demo for Desk Reference	<b>Status</b>	1-In Process				

Add Approval

Requested Approvals				
Type	Requested	Requested By	Requested Approver	Details
				<a href="#">Details</a>

- 3 Use the Approval Type Drop Down to select appropriate approval type (or “Other” if appropriate type is not on the list)
- 4 Click the “Select Employee” Button
- 5 Search for and select the name of person from whom you wish to request an approval.
- 6 Click the “Add Approval” button. The main Approvals page will re-open with the newly requested approval documented with date and time.

#### Add Approval

Requested By \_\_\_\_\_ Request Date 02/19/08 3:40PM Sequence 1

Approval Type

Approval Request

Approver Type Employee  Business Unit UWMIL

Requested Approver

## ATTACHMENTS

Any type of file attachment can be uploaded via this page including proposal narratives, budget spreadsheets for review, letters of commitment, and complete applications.

### 8. Upload Attachments:

- 1 Navigate to the attachment tab
- 2 Click the "Upload Attachment" button.
- 3 Browse for and upload the documents. (This process may take a couple of minutes depending on file size).
- 4 After the upload is complete, enter a file description such as "cost share commitment."
- 5 To add multiple attachments click the "Add another attachment" hyperlink.
- 6 To delete an attachment, click on the trash can next to the Upload Attachment button.

General	Projects	Approvals	Attachments	Division Action	SPO Action	Terms & Cond	Document History
<b>Record ID</b>	MIL101873			<b>Document Type</b>	Grant		<a href="#">Wisper Help</a>
<b>Contact PI</b>	HARRIS,MARK T			<b>Sponsor Name</b>	US DEPT OF HEALTH & HUMAN SERVICES		
<b>Short Title</b>	Demo for Desk Reference			<b>Status</b>	1-In Process		

<del>Upload Attachment</del>	File Description
1 Upload Attachment	<input type="text"/>
	<a href="#">Add another attachment</a>

## DEAN'S OFFICE PROCESSES

Division (Dean's Office ) Administrators have the responsibility of controlling the forwarding to OSP for action. They will both indicate their approval of the record and forward to OSP via the Division Action page. Access to the Division Action page is limited to those with any Division role. Others may determine if specific signatures or actions have occurred via the Document History page.

### 9. Proposal Stage

- 1 Division Signature - The first action is to indicate validation of information on the record. The I SIGN Button indicates this validation and is available any time after the PI signs the record.

General	Approvals	Attachments	Division Action	SPO Action	Terms & Cond	Document History
<b>Record ID</b>	MIL101873			<b>Document Type</b>	<a href="#">Wisper Help</a>	
<b>Contact PI</b>	HARRIS,MARK T			<b>Sponsor Name</b>	US DEPT OF HEALTH & HUMAN SERVICES	
<b>Short Title</b>	Demo for Desk Reference			<b>Status</b>	1-In Process	

#### Administering Division Signature

The signature by the authorized representatives in the Administering Unit confirm that the proposal or award and this form have been reviewed and found to be accurate and complete, including required clearances, budget and commitments involving space, faculty/staff time and matching funds. Please note the requirements for projects that cross departments or divisions

By clicking on the "I Sign" button below, I agree to this text.

Division Signature performed by  
Date & Time

- 2 Submit to SPO (RSA) –

After completion of the WISPER record, including signatures by the Division and PI, the Division can submit the proposal to RSA (SPO). Any hard copy paperwork is sent manually to OSP (with flag indicator on submission instructions that paper is forthcoming). The Submit to SPO (RSA) button will trigger the move of the record off of the campus MY WISPER In Boxes and into a Central OSP worklist for further action. Several validations are done during the submission of the record to OSP. These validations may be run separately by selecting the left validation button prior to selecting the Submit to SPO. The validation checks for signatures and completeness of the record. It also provides warning if any approval requests have not received responses. The record may be submitted to SPO with Warnings, but any Errors noted by the validation must be corrected before the record may be submitted.

<input type="button" value="Validate to Submit"/>	<input type="button" value="Submit to SPO"/>
<input type="button" value="Validate to Req Adv Account"/>	<input type="button" value="Request Advance Account of SPO"/>
<input type="button" value="Validate to Req Project /Award Finalized of SPO"/>	<input type="button" value="Request Project /Award Finalized of SPO"/>

- 3 Request Advance Account (Backstop) –

An Advance Account should be initiated by the PI requesting an approval from the Division (School/College) to set up an Advance Account. The division may then click the "Request Advance Account of SPO" button. Note that the same information required to be completed in order to generate an award (listed in the next section) is also required for an Advance Account.



## 10. Award Stage

When an award is received at OSP, the division will be notified by the record appearing on the Division worklist and a request for approval to the Division from the OSP staff member working on the proposal.

### 1 Project Details

OSP will enter some of the information required for a proposal to be generated into an award. However, it is the responsibility of the PI or the department or school/college personnel to enter the following information on the Project Details page for each project on the award:

- Project Type
- Effort Commitment
- Cost Sharing
- Start and End Dates
- Fund Code
- Protocol Approvals

In addition, it is the responsibility of the PI to update Protocol Details (if any) located on the General Tab in the Compliance section.

### 2 Electronically Sign for the Award

Before OSP can execute the agreement and/or generate the award, the Division is responsible for ensuring that the Division can support the investigator in completion of the project. Navigate to the Division Action tab

- Read the second statement that indicates Divisional concurrence with the terms and conditions of the award (attached to the record) and ensures the Division's role in meeting those terms.
- Sign for the Award by clicking the "I SIGN" button
- Verify that your name is recorded along with the date/time stamp.

I certify that on behalf of the Division, I understand that by clicking on the "I Sign" button below, I agree that the Division is willing to support the PI and the University in order to carry out its obligations under the award and will be responsible for any otherwise unresolved over expenditures remaining at the end of the project.

**Division Signer** KISSINGER,PATRICIA  
**Date & Time** 01/29/2008 11:18AM

### 3 Click the "Request Project/Award Finalized of SPO

<input type="button" value="Validate to Submit"/>	<input type="button" value="Submit to SPO"/>
<input type="button" value="Validate to Req Adv Account"/>	<input type="button" value="Request Advance Account of SPO"/>
<input type="button" value="Validate to Req Project /Award Finalized of SPO"/>	<input type="button" value="Request Project /Award Finalized of SPO"/>

## 11. Maintain WISPER Department Email Contacts

The function of the Department email table is to manage the recipients of the email notification of Award Modifications and Finalized non-PeopleSoft eligible documents. These communications will replace the regent and non-regent notices. **This does not apply to emails sent from WISPER for routing and approvals.** Department email recipients will be maintained by those users with the Division Role.

### 1 Login:

- a. Navigate to the WISPER login page via <https://uwm.edu/officeofresearch/wisper/>.
- b. Enter your PantherID and password.
- c. Select the "Department Emails Contact Page" link at the bottom of your My WISPER page.(This link is also accessible from the Search page). The Department Contacts Selection page will open.

[New Window](#) | [Help](#) 

### Department Contacts

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

**Business Unit:**    
**Department:**

[Basic Search](#)  [Save Search Criteria](#)

### Search Results

View All First  1-21 of 21  Last

Business Unit	Department
<a href="#">UWMIL</a>	<a href="#">01GEDA</a>
<a href="#">UWMIL</a>	<a href="#">02FAAA</a>
<a href="#">UWMIL</a>	<a href="#">03STAF</a>
<a href="#">UWMIL</a>	<a href="#">05ACAF</a>
<a href="#">UWMIL</a>	<a href="#">06MILW</a>
<a href="#">UWMIL</a>	<a href="#">10CHSC</a>
<a href="#">UWMIL</a>	<a href="#">11SARP</a>
<a href="#">UWMIL</a>	<a href="#">12LBUS</a>
<a href="#">UWMIL</a>	<a href="#">17SOED</a>
<a href="#">UWMIL</a>	<a href="#">19CEAS</a>
<a href="#">UWMIL</a>	<a href="#">21ARTS</a>
<a href="#">UWMIL</a>	<a href="#">34GRAD</a>

## 2 Add Department Contacts




- a. Select the Division for which you want to update the Department email contacts. You will only have access to the Divisions for which you are the Division Role Member. A page will open listing all the departments or nodes and employees or emails assigned to that Division.
- b. To add an employee or email address, select the “+” icon. A new row will be created.
- c. Enter the Department or Node for which the employee should receive email notifications. This gives you a great deal of flexibility in assigning the breadth of emails a given individual will receive.
- d. If you are selecting an employee and wish to send the email to their email address on file with the University, using the PeopleSoft lookup icon to locate the correct person.
- e. Click Save

[New Window](#) | [Help](#) | [Customize Page](#) | 

Uw Gm Deptcnctcs

**Business Unit** UWMIL **Division** 06MILW 06-Milwaukee Idea

For each row, select an Employee or enter a Dept Email Box

Customize   Find    First  1 of 1  Last				
<u>UDDS</u> <u>Begins</u> <u>With</u>	<u>Employee</u> <u>Person ID</u>	<u>Employee Name</u>	<u>Employee Email</u>	<u>Or Email Box</u>
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

## 3 Delete Department Contacts

- a. To delete an employee or email address as a department contact, select the “-” icon next to the row you wish to delete.
- b. Click save.

Additional information and help is available at:

<https://uwm.edu/officeofresearch/wisper/> or

email [WISPER-rsa@uwm.edu](mailto:WISPER-rsa@uwm.edu)

or

call 414.229.3332