University of Wisconsin
Grants Project
Desk Reference
*Madison * Milwaukee * Extension*

WISPER Project Details

In addition to the routing of applications and agreements, WISPER facilitates the capture of necessary data for project management such as Protocol Details, Budget Details, Combination Edits, Commitments, and Cost Sharing. The process of collecting details about the award and projects can be initiated at any time; however, it is required before RSP generates the award into the PeopleSoft Financials System. The Project Details page is not accessible for document types that are not eligible for generating into awards (i.e. CDA, NFA, MTA). This desk reference provides information on how to capture these details.

Each award requires at minimum one project. **If Additional projects are needed to facilitate separation of research activity or in order to meet sponsor reporting or billing requirements, these should be requested prior to submitting the record to RSP.**

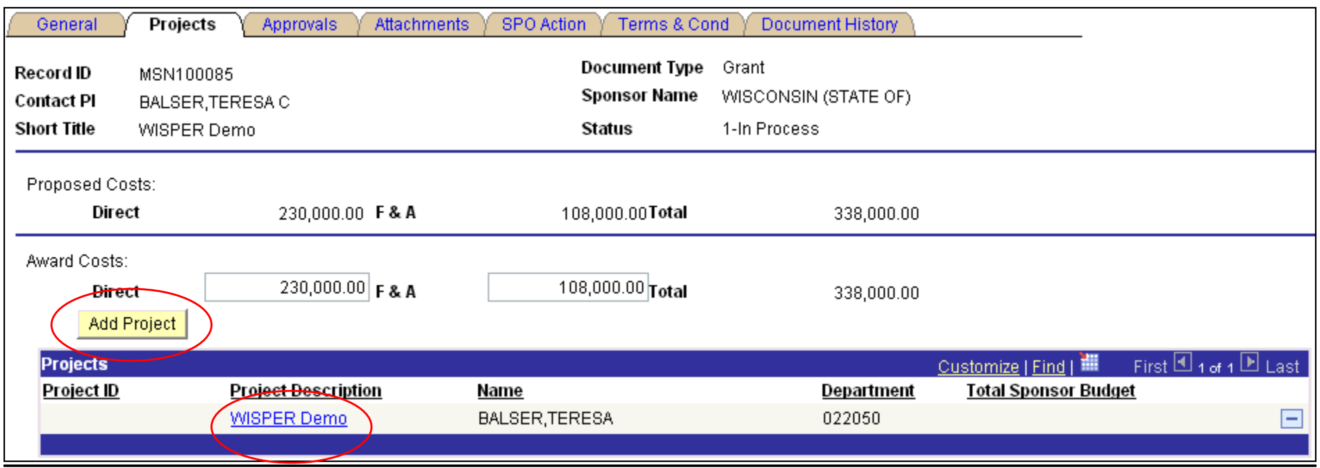
1. When RSP receives notice of award or an executed agreement, RSP will send a Set up Projects approval to the Division Role.
2. The Division will determine who should complete the tab and will communicate that requirement by routing, adding approval or choosing other methods as desired by each Division.
3. It is ultimately the responsibility of the Division to notify RSP of the completion and accuracy of the information (detailed below) to be provided. They will do so by:
    a. Respond to the RSP initiated SET UP PROJECTS approval, and
    b. Press the "REQUEST AWARD/PROJECT FINALIZED BUTTON OF SPO"
4. The information which is required to be completed on the record is detailed below.

LOGIN & SELECT THE WISPER RECORD:

1. Navigate to the WISPER login page via http://www.rsp.wisc.edu/WISPER/, select the *Log in to WISPER* button, then enter your netID and password. Navigate using the left menu to UW WISPER.
2. Locate the record for which you want to enter the Project Information using your MY WISPER worklist page or by the Search page.

PROJECTS

1. Navigate to the Projects tab. Note the following:
   a. Award cost information will default from the proposed budget previously entered on the General page, but can be changed if necessary.
   b. The first project is already created and accessible via the Project Description hyperlink. Award information such as PI and Owning Department will be defaulted on the first project to reduce initial data entry.
   c. If the award requires multiple projects, click the "Add Project" button as many times as needed.
   d. Click the project description hyperlink to open the project details page where further information can be entered.



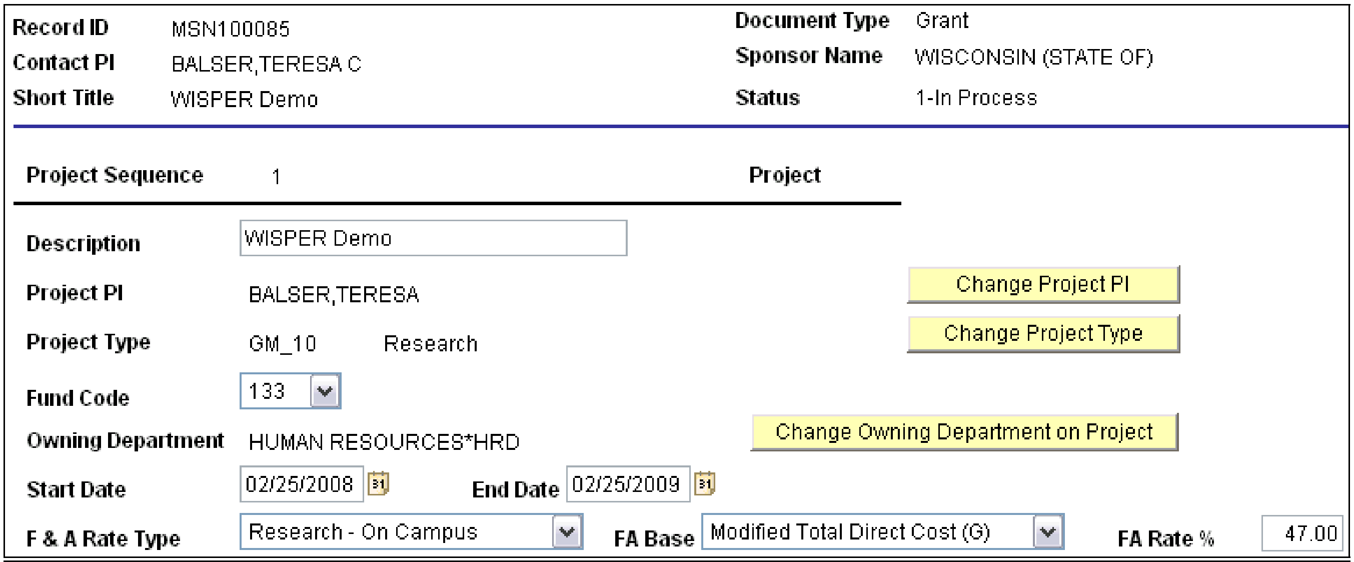
1. Project Header:

The top portion of the Project Details page is the Project Header and is used to capture demographic information about each project. The description, PI, owning department, start/end dates, and F&A rate default from the WISPER General page. Any of this information may be changed for the project at this time.

Enter any the following information:

1. Description - Enter a brief title that can be used to locate and identify the project in WISPER & WISDM.
2. Project PI – If differs from the Award PI, select this button to change the Project PI.
3. Project Type – Use the Add/Change Project Type button to select the appropriate type. See the WISPER Manual for valid values.
4. Fund Code – If funding from a Federal source, select 144. If funding is from a Non-Federal source, select 133.
5. Owning Department – Defaults from the Award Owning Department. If differs from what is shown, select the button to look up the appropriate Project Owning Department.
6. Project Start & End Date

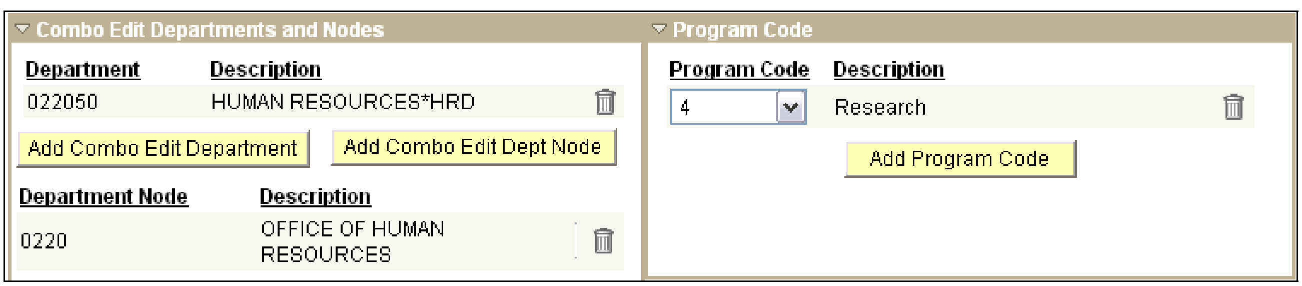
7. F&A Rate Type, Base, & Rate



2. Combo Edit Information:

In this section users provide the details for which expenses will be allowable on the project. Multiple departments can be entered by clicking the "Add Combo Edit Department" button. In addition, users may also enter nodes, which allow spending for an entire department or division.

The appropriate program code can be selected from the dropdown. Multiple program codes can be entered by clicking the "Add Program Code" button. If this section is left blank, all program codes will be allowable on the project.



3. Budget Details:

The level of budget detail requested is driven by the Sponsor & the Document Type. Budget items may be recorded at the summary level (Direct and F&A), at the category level, or using the NIH Training Grant categories. Enter the breakout of the costs for the project using the Budget Amount fields at the breakout level required. Be sure that the budgets for all projects add up to the total Award Costs on the Projects tab.

Budget Details

Budget Item	Description	Budget Amount
LUMP_SUM_DIRECT	Lump Sum Direct	250,000.00
LUMP_SUM_FA	Lump Sum F & A	117,500.00
	Total Sponsor Budget	367,500.00

4. Project Commitment:

Project Commitment is the effort that the PI and Key Personnel have committed to the project. **Only information for individuals identified in the award documents as Key Personnel should be entered.** If no individuals are identified in the award, then only the PI & Co-PI's will be entered. All Contact PI's must have a minimum 1% commitment on a project in the award (except for Clinical Trials). This information will be loaded into ECRT for use in Effort Reporting after the Award has been generated into PeopleSoft Grants.

1. Click the "Add Project Commitment" button.
2. Lookup and select the employee for whom you need to enter effort.
3. Choose the Project Role using the dropdown menu.
4. Start and end dates will default from the project start and end dates. Update if the commitment is not for the entire length of the project.
5. Enter the portion of the commitment which the Sponsor is paying (Sponsor %) and the portion of the commitment that is not being paid for from this project (Cost Shared %).
6. Repeat steps 1-5 for each person for whom commitments must be tracked. Multiple lines per person may be entered, if the commitment is not continuous or if the effort changes throughout the life of the project.

Project Commitment

Name	Project Role	Start Date	End Date	Sponsor %	Cost Shared %	Total %
BALSER,TERESA	PI	02/25/2008	02/25/2009	10	10	20
HILLMER,CAROL	KEY	02/25/2008	02/25/2009	10	15	25

Add Project Commitment

5. Cost Share:

Details for all personnel who commit time to the project, but do not have their salary reimbursed on the award are captured in this section. This information will be used both to report to sponsors and to assist in Effort Reporting. If a Cost Shared % greater than 0% is entered in the Project Commitments section, the person's name will default along with the commitment start date, end date, and cost shared percent. The information in tthe "From Project ID", "From Fund" and "From Department" fields are the payroll source of funds paying for the portion of the commitment not paid by the Sponsor.

1. Update the Start & End Dates if the Cost Share commitment requires multiple lines due to:
   a. Cost sharing source changing throughout the life of the commitment
   b. Cost sharing percentage changing throughout the life of the commitment

c. The cost share duration is non-contiguous and will take place over multiple periods for a single resource

2. Enter the following information:
   a. Project ID
   b. Fund Code
   c. Department
3. Use the drop down menu to select a cost share type of mandatory, voluntary, or NSF
4. Additional project cost share can be added by clicking the "Add Project Cost Share" button. This button launches an employee lookup to search for & find the cost shared employee.
5. Repeat steps 1-3 for each person with cost shared salary.
6. If there is Non-Salary cost sharing that must be provided, include a note in the Comments to RSP that indicates who will document the cost share as a term of the award.

Cost Share

Name	Start Date	End Date	From Project ID	From Fund Code	From Department	Cost Shared %	Cost Share Type
BALSER,TERESA	02/25/2008	02/25/2009	PRJ31CY	144	022055	10	Vol
HILLMER,CAROL	02/25/2008	02/25/2009				15	Vol

Add Project Cost Share

After all known project details have been entered, click the "Save and Return to Record" button. Repeat steps 1-4 for all projects on the record.

PROTOCOL DETAILS

If the award involves humans, animals or toxic materials such that require institutional approval , protocol certification details must be entered.

Business Unit UWMSN **WISPER ID** MSN120072

Description	Protocol Number	Protocol Status	Protocol Approval Date	Protocol Expiration Date
Biological Safety Approval 1	SC07-09R	Not Appl		
Human Subjects Approval 10	2007-065	Approved	02/05/2008	02/04/2009
Animal Welfare Approval 1	A0605440708	Pending		

Add Biological Safety Approval | Add Human Subjects Approval

Add Animal Welfare Approval | Add Human Pluripotent Approval

Return

1. Select the General tab and scroll to the Compliance section.

2. Click the “Enter Protocol Details Here” hyperlink at the bottom of the Compliance section to access the protocol details page.
3. To add protocols of each type, use the appropriate Add XXXX button. Selecting the button will create a row enter the details. You can add as many rows (multiple protocols) as needed to accurately represent the number of protocols on the award.
4. Enter the protocol number as provided on the approval from the appropriate committee. For the Animal Approval do not enter any of the hyphens in the number.
5. Select the Protocol Status.
6. Enter the Protocol Approval Date.
7. Enter the Protocol Expiration Date. If you are entering an Exempt Human Subjects protocol, leave this field blank.
8. Repeat steps 3-7 for each protocol approval.
9. Click the “Return” button when all protocols have been entered.

****Please be advised that all directions provided in this document may be superseded by division authority.****