1. Functional Overview

1.1 Business Need and Goals Statement

RSP and divisional/dean's office representatives send out approval requests to campus for information prior to setting up an award. The project cannot be set up until the requested information is provided and the approval request is approved. APR Award Set Up Team's improvement "O" involves email reminders of the pending approval requests at 4, 8, and 12 days past the date of the request, to help ensure that responses are made in a timely manner. This report will build on the email reminders by providing a list of pending project set-up approvals to the pertinent divisional/dean's office.

Business Process Impact

Divisions and departments will be periodically triggered to check on approval requests that remain unresolved for a relatively long period of time.

1.2 Assumptions

This report would become part of a suite of reports made available for divisions/dean's office representatives, and therefore should resemble the existing reports (i.e., negative balance reports, gift overdraft reports) in terms of look and feel, as well as delivery. The report would be "live," allowing divisions/dean's offices to view it at any time and see up-to-date data.

1.3 Dependencies

This report is intended to be complementary to the delinquent email reminders described in solution O. However, it is not dependent upon completion of O, and can be implemented prior to the 4, 8 and 12 day reminders.

1.4 Risks

There is the risk of burdening of the division contacts with too many emails. For this reason, we propose that email reminders of the collection delinquent report be distributed monthly, although the report would be available at all times. Longer term, we hope to ameliorate this risk by combining multiple emails/reports to the division into a single "dashboard" as described in solution V.

1.5 Design Validation Approach

The format of the report will be vetted by selected Dean's Office representatives.
1.6 Supporting Documentation

Example overdraft report:
<https://www.rsp.wisc.edu/services/admin/awardoverdraft.cfm?UD=%26%259B8F%5B%2A%3D%0A>

Functional Description

1.7 Overview

General Description

All WISPER records having a pending Set-up Projects approval (that has not been approved or denied) will be listed on a web-based report, labeled the "Project Set-up Pending Report." This report should list the records in descending order based on the time elapsed since the set up projects request was initiated. Records which have more than 16 days elapsed should be highlighted in red.

A monthly email reminder to review the report will be sent to division/dean's office. This email message will include a URL which is specific to the pertinent division (i.e., the email message sent to the Graduate School will include a link which, when opened, displays only the A34 records on the report).

The email reminders may be sent from rspinfo@rsp.wisc.edu (as the overdraft reports are).

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>Telephone</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stephanie Gray</td>
<td><a href="mailto:sgray@rsp.wisc.edu">sgray@rsp.wisc.edu</a></td>
<td>608-262-0237</td>
<td>RSP</td>
</tr>
<tr>
<td>Melanie Jacobs</td>
<td><a href="mailto:Mrjacobs3@rsp.wisc.edu">Mrjacobs3@rsp.wisc.edu</a></td>
<td>608-262-6712</td>
<td>RSP</td>
</tr>
<tr>
<td>Aimee Lefkow</td>
<td><a href="mailto:lefkow@hep.wisc.edu">lefkow@hep.wisc.edu</a></td>
<td>608-263-2267</td>
<td>L&amp;S/Physics</td>
</tr>
<tr>
<td>Petra Schroeder</td>
<td><a href="mailto:pschroeder@bascom.wisc.edu">pschroeder@bascom.wisc.edu</a></td>
<td>608-265-4868</td>
<td>Grad School</td>
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</tbody>
</table>

1.8 Detailed Description

Functional Details

1-Automated Email Message

Email to: School/College research administrators (using same distribution list as used for overdraft reports; this may be the divisional contacts in WISPER).

Subject line: Project Set-up Pending Report for (division code, i.e., A34GRAD)."
The Project Set-up Pending Report for 34GRAD can be viewed at the following location: URL

RSP is providing this information to help you better manage extramural support in your division. Please pay particular attention to the records highlighted in red, as more than 16 days have passed since the initial set-up projects approval request was initiated.

2-Web based report

Logic:
IF the WISPER record is in Status 5
And Approval Type SET UP PROJECTS was requested
AND request has been open for date of last action + 16 days
THEN include WISPER record in report.

WISPER fields to be included in report table:
- Dept. ID (DDS code) (in first column to ease sorting)
- Department Name
- WISPER record number
- Sponsor Name
- Flow-Through Sponsor Name
- PI Name
- Proposed begin date
- Set up projects approval request date
- No. of Days since approval request
- No. of Days since last comment entered

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**Target Date and Level of Importance**

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<th>Target Date</th>
<th>September 1, 2009</th>
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<tr>
<td>Level of Importance</td>
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**Security Considerations**

not applicable
Conversion Considerations

not applicable

3. Quality Assurance

3.1 Use Cases

A use case concretely explains- by sequentially listing the steps in the business process- how a user accomplishes a goal using one or more features of a system. A use case, commonly, is written as a dialog between the user (what the user is doing) and the system (how the system responds to the user’s intention.)

Following is a table-template for a use case. First, identify a user’s goals and key needs and then complete the sections of the use case template. Questions to ask include: Which business objects are of primary concern to this user? Which users do they interact with to accomplish the specific business goals?

For situations that are complex or not understood clearly, a more comprehensive use case should be created. This could include alternate scenarios and/or extensions to the basic business process flow.

<table>
<thead>
<tr>
<th>Use Case Section</th>
<th>Description</th>
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<tbody>
<tr>
<td>Name</td>
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<tr>
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<td></td>
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<tr>
<td>Brief Description</td>
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<td>Goal</td>
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<td>Post-conditions</td>
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<tr>
<td>Scenarios</td>
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</table>
3.2 Performance Considerations

Email reminders to the Divisions can be sent at any time and/or on the same time schedule as the negative balance reports.

4. Other

4.1 Training Considerations

An announcement regarding the implementation of this report should be sent to the College/School reps.

4.2 Glossary

Not applicable.