1. Functional Overview

1.1 Business Need and Goals Statement
RSP sends out Set-up Projects requests to Campus to collect information prior to setting up an award. Due to work load, RSP does not always have the opportunity to follow-up with Campus to ensure that the pending request has been received and is being completed. The Email reminders to Campus will help ensure that requests are handled more efficiently by Campus and by RSP.

1.2 Business Process Impact
As this will be an automated email, RSP Staff who did follow-up on their pending approval requests will no longer do so, since WISPER will do that for them.

1.3 Assumptions
It is assumed that the person in the Awards Setup Contact table is the correct person to receive this email reminder.

1.4 Dependencies
As written this spec is dependant upon the creation of the Award Setup Contacts Table in WISPER to identify the collection specialist.

1.5 Risks
There is the risk of burdening of the Department Contacts as they may be receiving too many WISPER emails. The emails reminders may lose their effectiveness.

1.6 Design Validation Approach
The text and format of the email reminder will be vetted by a random sample of Dean’s and Administrators who typically complete and/or approve the Setup Projects Tab: Ginger Freitag in CALS; Linda Johnson in L&S.

1.7 Supporting Documentation
APR_SP_PhaseIIIAwardSet-upPresentation20090609.pdf
Functional Description

1.8 Overview

<table>
<thead>
<tr>
<th>General Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>An email will generate if approval request has not been acted upon (approved, denied, comments) from WISPER 4, 8, and 12 calendar days after the approval type Set-Up Projects has been issued. The email will be sent from <a href="mailto:wisper@rsp.wisc.edu">wisper@rsp.wisc.edu</a> to the person listed in the Award Setup Contacts Table. The clock starts ticking the moment an approval request is sent and if someone on Campus acts on the approval by making a comment, the timing clock resets. On the 12th day (3rd email) the email reminder will also be sent to the PI.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Functional Contacts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
</tr>
<tr>
<td>Stephanie Gray</td>
</tr>
<tr>
<td>Melanie Jacobs</td>
</tr>
<tr>
<td>Aimee Lefkow</td>
</tr>
<tr>
<td>Petra Schroeder</td>
</tr>
</tbody>
</table>

1.9 Detailed Description

<table>
<thead>
<tr>
<th>Functional Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject line: WISPER Delinquent Setup Projects on [WISPER field “Record ID”] MSNXXXXXX The email will read: DELINQUENT APPROVAL REQUEST You have a pending Setup Projects approval that has not been acted on in 4_8_12 days. Please review the WISPER approval request listed below, complete the information under the Projects Tab of this record, and approve the transaction. Your cooperation will expedite the set-up for this award. MSNXXXXXX for PI: LAST, FIRST SPONSOR: SPONSOR If you have any questions or concerns regarding this approval request, please contact “REQUESTER”.</td>
</tr>
</tbody>
</table>

Please access WISPER at: [https://portal.sfs.wisconsin.edu/psp/sfs_1/EMPLOYEE/ERP/c/UW_WP_WISPER.UW_WP_MY_WISPER2.GBL](https://portal.sfs.wisconsin.edu/psp/sfs_1/EMPLOYEE/ERP/c/UW_WP_WISPER.UW_WP_MY_WISPER2.GBL)
The following fields will need to be pulled from the WISPER MSN record to the email:
- MSN Number
- PI Name
- PI Email
- Award Setup Contact Table
- Sponsor
- Requester's Name
- Date Approval Requested

Logic:
IF the WISPER record is in Status < (less than) 6
And Approval Type SET UP PROJECTS was requested
AND the request is open (where open = not Approved or Denied)
THEN
Send email reminder to the person listed in the Award Setup Contacts Table on Date Requested +4 days after the last action date
(where last action date = date requested OR date of last comment on the open request).
AND IF request is still open on last action date + 8 days
THEN
Send email reminder to the person listed in the Award Setup Contacts Table.
AND IF request is still open on last action date + 12 days
THEN
Send email reminder to the **PI** AND the person listed in the Award Setup Contacts Table

**Target Date and Level of Importance**

Target Date September 1, 2009
Level of Importance: High

**Security Considerations**

Complete if necessary
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 Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use Case Section</td>
</tr>
<tr>
<td>Name</td>
</tr>
<tr>
<td>Author/Date</td>
</tr>
<tr>
<td>Brief Description</td>
</tr>
<tr>
<td>Goal</td>
</tr>
<tr>
<td>User/User Role</td>
</tr>
<tr>
<td>Success Condition</td>
</tr>
<tr>
<td>Trigger</td>
</tr>
<tr>
<td>Pre-conditions</td>
</tr>
<tr>
<td>Post-conditions</td>
</tr>
<tr>
<td>Scenarios</td>
</tr>
</tbody>
</table>

3.2 Performance Considerations

Thousands of records will require the email reminders.
Emails can generate either overnight or exactly 96 hours, 192 hours, 288 hours after the approval was sent. This choice is left to the programmers.

4. Other

4.1 Training Considerations

An announcement regarding the implementation of the new email notices should be sent to the College/School reps who should then disseminate to their constituents. An announcement in the WISPER 201 course should also be made.

4.2 Glossary

Include a glossary if necessary

APR = Administrative Process Redesign: [http://www.vc.wisc.edu/apr](http://www.vc.wisc.edu/apr)

WISPER = an application to assist in routing, approval, and negotiation of applications and agreements related to extramural funding on the UW campus. WISPER provides the data necessary to record information sufficient for internal tracking and reporting purposes and facilitates the Generation of Awards in the new PeopleSoft Grants system.

Award Setup = Process by which UW accepts sponsored research
From: wisper
To: Gray, Stephanie
Subject: Fwd: WISPER Delinquent Setup Projects on MSN123456

DELINQUENT APPROVAL REQUEST

You have a pending Setup Projects approval that has not been acted on in 4 days.

Please review the WISPER approval request listed below, complete the information under the Projects Tab of this record, and approve the transaction. Your cooperation will expedite the set-up for this award.

MSN123456 for Mark Sweet
SPONSOR: DHHS, PHS, NATIONAL INSTITUTES OF HEALTH

If you have any questions or concerns regarding this approval request, please contact Stephanie Gray.

Please access WISPER at:
https://portal.sfs.wisconsin.edu/psp/sfs_1/EMPLOYEE/ERP/c/UW_WP_WISPER.UW_WP_MY_WISPER 2.GBL