1. Functional Overview

1.1 Business Need and Goals Statement

Describe business need or function addressed by report/program
An email reminder will be sent 60 and 120 days after the anticipated begin date has past if no action has been taken on the record.

1.2 Business Process Impact

Describe any business process(es) that will be changed by report/program
This email reminder is a new process that should prompt the end user to notify RSP if they know their proposal is not being funded.

1.3 Assumptions

Describe business process, personnel action or decision assumptions required for this report/program
It is assumed that a proposal has been submitted using the WISPER routing system. It is also assumed the PI and the WISPER “Campus Contact” are the correct people to receive this proposed email reminder. At such a time as the “Award Setup Contact Table” is completed the email shall go to the PI and the person in the contact list for the associated administering department rather than the “Campus Contact”.

1.4 Dependencies

Describe decisions, actions, modifications, configuration or conversions which must be completed prior to completing this report/program or implementing it in a production environment
This email reminder can be implemented using existing WISPER fields however, upon completion of the Award Setup Contact Table this email shall be sent to the PI and the setup person in the table affiliated with the corresponding WISPER field “Administering Dept”.

1.5 Risks

Describe any risks associated with the report/program
The PI/Department may feel burdened by the receipt of administrative email.

1.6 Design Validation Approach

What steps has this design gone through in order to ensure quality?
The text and format of the email reminder will be vetted by a random sample of PIs.
1.7 Supporting Documentation

What existing documentation can be referenced to gather additional context regarding this report/program and where is it located?

Examples: Fit Gap Documents, Fit Gap Summary and estimation worksheets, output from other workgroups

APR_SP_PhaseIIIAwardSet-upPresentation20090609.pdf

2. Functional Description

2.1 Overview

**General Description**

Give a brief overview of the report/program and how it will function.

This email will be automatically generated and sent to the proposal PI and campus contact to ask them if the proposal is still pending 60 and 120 days after the WISPER field “Begin Date” if there has been no action on the record.

<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>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>
</tr>
</tbody>
</table>

2.2 Detailed Description

**Functional Details**

Include in this section all details about how the report or program will work. Include logic for reports, examples of email text, screen mockups, fields and layout of reports, etc. Use additional pages if necessary.

IF WISPER field “status” = 4-Sent to Sponsor

AND

IF TODAY minus WISPER field “begin date” = 60 days [repeat at 120 days]
AND

IF TODAY minus date of last action ≥ 60 days [repeat at 120 days]

   [where date of last action = any completed approval type]

THEN

Email WISPER field “campus contact” and WISPER field “Contact PI” with:

Email:
Email from: WISPER@rsp.wisc.edu
SUBJECT LINE: WISPER Pending proposal [WISPER field “Record ID”] MSNxxxxxx

BODY: Your pending proposal: [WISPER field “Record ID”] MSNxxxxxx
To: [WISPER field “Sponsor”]
Title: [WISPER field “Long Title”]

   It is now 60_120 days past the _anticipated_ begin date of this project.
   * If this proposal is still pending no action is required.
   * If you are aware that this proposal will not be funded, please 'reply all' to this email with such a statement.
   * If you know this project will be funded, you may wish to request a project number in advance of award if you have not done so already.
   * If you have received notification of an award, contact your department administrator or division contact to initiate project set up.

Please contact your department administrator or division with any questions.

To view this record on your WISPER work list, click here:
https://portal.sfs.wisconsin.edu/psp/sfs_1/EMPLOYEE/ERP/c/UW_WP_WISPER/UW_WP_MY_WISPER2.GBL

<table>
<thead>
<tr>
<th>Target Date and Level of Importance</th>
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<tbody>
<tr>
<td>Indicate the desired target date for implementation and level of importance</td>
</tr>
<tr>
<td>Target implementation: December 2009</td>
</tr>
<tr>
<td>Level of importance: Medium</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Security Considerations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete if necessary</td>
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</table>
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>
<td></td>
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<tr>
<td>Author/Date</td>
<td></td>
</tr>
<tr>
<td>Brief Description</td>
<td></td>
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<tr>
<td>Goal</td>
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<tr>
<td>User/User Role</td>
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<td>Success Condition</td>
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<td>Trigger</td>
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<tr>
<td>Pre-conditions</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**

Describe any considerations that may affect performance. How many transactions are expected to use the report/program? What ranges of data will reports or process use or generate? Are there timing considerations to take into account?

This program will run daily/nightly. Emails will be sent 7 days/week as criteria are met. No specific time of day is requested. Email will be sent at 60 and 120 day intervals.

4. **Other**

4.1 **Training Considerations**

Describe any training considerations

A statement can/has been added to the Research Admin 101 course to alert end users to this process improvement. An announcement to the College/School representative groups will 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