

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

**WISPER Record Creation Overview for Principal Investigators**

WISPER facilitates the process of routing applications and agreements for extramural support by capturing the necessary data and tracking it through the generation of the award. This document will walk through this process. Please feel free to leave fields empty and enter only known data, unless explicitly told to provide information within the following steps. If previously created records are available to copy, you may refer to the “Copy a Record” desk reference for information on how to quickly create a new record based on a previous record then begin using this reference at Step II..

\*\*\*Please be advised that some directions provided in this document may be superseded by division authority, so please check with your Division Administrator to confirm your process.

I.	CREATE NEW RECORD .....	2
1.	Login: .....	2
2.	Enter all Data on the Create New Record page:.....	2
II.	GENERAL PAGE INFORMATION .....	2
3.	Basic Information: .....	3
4.	Submission Instructions: .....	3
5.	Compliance: .....	4
6.	Personnel: .....	4
7.	Proposed Budget: .....	5
8.	Keywords: .....	5
III.	COMMENTS .....	6
9.	Enter Comments: .....	6
IV.	ATTACHMENTS .....	6
10.	Upload Attachments: .....	6
V.	PRINCIPAL INVESTIGATOR SIGNATURE .....	6
11.	PI Signature.....	6
VI.	ROUTE .....	7
12.	Route the Record: .....	7

## I. CREATE NEW RECORD

### 1. Login:

1. Navigate to the WISPER login page via <http://www.rsp.wisc.edu/WISPER>, select the Log in To WISPER button and enter your user ID and password.
2. Navigate to the MY WISPER Page by selecting UW WISPER then MY WISPER from the left menu.
3. Select the Create New Record button at the top of the page.

### 2. Enter all Data on the Create New Record page:

1. Enter the following key data to create the initial record:
  - a. Short Title
  - b. Contact PI (if you are academic staff, your name will default here – change if necessary)
  - c. Department
  - d. Sponsor
2. Check the email to PI box to send an email to the PI notifying them of the creation of this record and of the requirement they sign the record before submission to your Sponsored Projects Office. Note that you will have the option to send this email in later steps as well.
3. Note that if you have are creating a record for a campus other than that which is listed in the Business Unit field, you need to change it at this point. You cannot change this field at a later time.
4. Click “Create Record” to advance to enter more information

Create New Records Here.

Short Title

Contact PI

Department Business Unit

Dept ID

Sponsor

Sponsor Not In List:

*Navigation: UW WISPER > My WISPER > Create New Record button*

## II. GENERAL PAGE INFORMATION

Note that you now have the WISPER ID number available to you in the page header (see below). This number can be used to track this record. The General page captures the bulk of the information about your documents.

### 3. Basic Information:

Note the existence of the Outside Activities Report Submitted and Effort Requirements Completed indicators next to the PI in this section. Note that before applications can be submitted, the PI must have both the responses as yes. If you have questions regarding the status or the requirements, please select the help icon next to each field.

1. Enter the basic information requested at the top of the General page. If known, enter any of the following information:
  - i. Official proposal title
  - ii. Begin and End dates
  - iii. Proposal type
  - iv. Document type – this field is required for further actions
2. If known, click the “Add Related Document” button for the option of linking this record as a supplement to an existing record, a continuation of an existing record, an agreement which has a CDA or MTA preceding it, or any other relationship you can think of.
3. The Contact PI, Department, and Sponsor also may be changed in this section.

The screenshot displays the 'Basic Info' section of a grant record in the WISPER system. The record details are as follows:

- Record ID:** MSN118724
- Contact PI:** SHEIBANI, NADER
- Short Title:** Thrombospondin-1 and Diabetic Nephropathy
- Document Type:** Grant
- Sponsor Name:** AMERICAN DIABETES ASSOCIATION
- Status:** 1-In Process

The 'Basic Info' section includes the following fields and options:


- Contact PI:** SHEIBANI, NADER. Includes a 'Change Contact PI' button.
- Official Proposal Title:** Thrombospondin-1 and Diabetic Nephropathy.
- Short Title:** Thrombospondin-1 and Diabetic Nephropathy.
- Administering Dept:** 536000 OPHthal&VIS SCI\*OPH&VIS SC. Includes a 'Change Department on Record' button.
- Begin Date:** 01/01/2009. **End Date:** 12/31/2011.
- Sponsor:** AMERICAN DIABETES ASSOCIATION. Includes a 'Change Sponsor on Record' button and a checkbox for 'Sponsor Not in List'.
- Primary Sponsor (Optional):** Includes a checkbox for 'Primary Sponsor Not in List', an 'Add Primary Sponsor to Record' button, a 'Remove Primary Sponsor' button, and a 'Save' button.
- Indicators:** 'Outside Activities Report Submitted' and 'Effort Training Completed' are both set to 'Yes'.
- Proposal Type:** New.
- Document Type:** Grant.
- Related Record:** Includes 'Add Related Record' and 'Remove Related Record' buttons.

### 4. Submission Instructions:

This section captures detailed Sponsor submission instructions and the campus contact information.


1. Enter the necessary data for the following fields:
  - a. Sponsor deadline
  - b. Submission method
  - c. UW campus contact
  - d. Submission instructions
2. If the agreement or application requires hard copy signatures or there are documents that must be sent via your Division to RSP that cannot be uploaded electronically as attachments, check the Paper Copy to UW SPO box.
3. If known, note the sponsor program number and any unique reference number provided by the Sponsor or submission system to identify this record.

**Submission Instructions**

Sponsor Deadline: 04/01/08  Paper Copy to UW SPO

Submission Method: Fastlane Sponsor Program Number: NSF 05-067

Sponsor Reference Number: TMP ID 5576328

Campus Contact: BUSBY,TERESA  
 Change Campus Contact

Campus Contact Phone: 608/263-5744  
 TCBUSBY@WISC.EDU

Submission Instructions: I will allow SRO access to View, Edit & Submit when final documents are ready in Fastlane.

**5. Compliance:**

All compliance questions must be answered before the PI has the ability to sign the record. Answer each question with the YES/NO dropdown. Once the record is saved, you may select the hyperlink to enter Protocol details protocol type, number, status, approval date, and expiration date. These details are not required for proposal submission but will be required at award stage.

**Compliance**

Required Clearances - Does the project involve:

Yes  toxic, infectious or carcinogenic/mutagenic material of proven or potential hazard to humans, other animals, or to plants? Use recombinant DNA technology?

No  use of human subjects or human tissue?

No  use of vertebrate animals?

No  involve human pluripotent stem cells?

No  action involving space, remodel, or construction?

No  potential environmental impacts which require review under the Wisconsin Environmental Policy Act?

No  funding primarily dedicated to building, renovations, or equipment?

[Enter Protocol Certification Details Here](#)

**6. Personnel:**

The personnel section allows the capture of multiple employees working on the project with Co-Investigator, Fellow, and other project roles. All Senior/Key Personnel should be entered as well as Fellows as most fellowships arrive in the name of the fellow.

1. Click the "Add Other Personnel to Record" button which will open a new page allowing an employee search by name or Dept ID (UDDS).
2. After employee selection, identify their project role from the dropdown menu.
3. Repeat this process for as many personnel as necessary.
4. To delete personnel from the record click the trashcan to the right of the employee.

Name	Project Role	Outside Activities Report Submitted	Effort Training Completed
CURRIE,CAMERON	Principal Investigator	No	No
READ,HARRY	Key Person		

**Add Other Personnel to Record**

**7. Proposed Budget:**

1. Enter the total proposed budget, which must be broken down and entered as direct and F&A costs. The Total Costs will be calculated based on the amounts in the Direct and F&A fields.
2. Enter the F&A rate.
3. Specify if there is any cost sharing and provide some basic Comments such as voluntary PI time at 5% or mandatory 1:1 requirement per the RFA.
4. If the project work meets the UW definition of "Off Campus" (see the RSP Policies page at <http://www.rsp.wisc.edu/policies/> for more information), switch the "On Campus" radio button to "No" and provide the necessary location information.

<b>Direct Costs</b>	230,000.00	<b>Cost Sharing Included</b>	Mandatory	<b>ENTER COST SHARE COMMENTS HERE.</b>
<b>F &amp; A Costs</b>	108,000.00	<b>Cost Sharing Amount</b>	15,000.00	
<b>Total Costs</b>	338,000.00			
<b>F &amp; A Rate</b>	47.00 %			
<b>On Campus</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No	<b>Cost Share Comments</b>		
<b>Country</b>	USA			
<b>City</b>	Chicago			
<b>State</b>	IL			

**8. Keywords:**

Keywords help assist in tracking research in major scientific areas. Enter record keywords separated by a comma or semi-colon.

<b>Keyword</b>	microbiology; amoeba lifecycle
<input type="button" value="Add Comments"/> <input type="button" value="Print"/>	

### III. COMMENTS

#### 9. Enter Comments:

The Comments tab can be used to enter any information which you would like to store on the record or convey to any other users but which cannot be entered into any other field. Enter any such information at this time.

<a href="#">General</a>	<a href="#">Comments</a>	<a href="#">Projects</a>	<a href="#">Approvals</a>	<a href="#">Attachments</a>	<a href="#">Division Action</a>	<a href="#">SPO Action</a>	<a href="#">Terms &amp; Cond</a>	<a href="#">▶</a>
<b>Record ID</b>	MSN110112	<b>Document Type</b>	Grant					<a href="#">Wisper Help</a>
<b>Contact PI</b>	SKINNER,JAMES L	<b>Sponsor Name</b>	NATIONAL SCIENCE FOUNDATION					
<b>Short Title</b>	Purchase of a MALDI-TOF/TOF Mass Spectrometer and a serv	<b>Status</b>	4-Sent to Sponsor					
<hr/>								
<b>Document General Comments</b>								
<input type="text"/>								

### IV. ATTACHMENTS

Any type of file attachment can be uploaded via this page including the Request for Proposal, PureEdge or Adobe PDF files, budget spreadsheets for review, and the complete application. **Note that the file name cannot exceed 64 characters.**

#### 10. Upload Attachments:

1. Navigate to the Attachments 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, a file description can be entered on the main attachments page.
5. To add additional attachments click the "Add another attachment" hyperlink. A new line will open. Repeat steps 2 through 4.
6. To delete an attachment, click on the trash can next to the Upload Attachment button.

<a href="#">General</a>	<a href="#">Approvals</a>	<a href="#">Attachments</a>	<a href="#">PI Signature</a>	<a href="#">SPO Action</a>	<a href="#">Terms &amp; Cond</a>	<a href="#">Document History</a>
<b>Record ID</b>	EXT100028	<b>Document Type</b>				
<b>Contact PI</b>	KLASKI,JOAN	<b>Sponsor Name</b>	AMERICAN COUNCIL ON EDUCATION			
<b>Short Title</b>	Cooperative Agreements on School Funding	<b>Status</b>	1-In Process			
<hr/>						
<b>Upload Attachment</b> <b>File Description</b>						
1 <input type="button" value="Upload Attachment"/>		<input type="text"/>			<a href="#">Add another attachment</a>	

### V. PRINCIPAL INVESTIGATOR SIGNATURE

#### 11. PI Signature

Principal Investigators are be required to verify the information provided in the record and attest to compliance with University, Federal and Sponsor requirements prior to routing the document to RSP.

This signature may be provided immediately following the initial data entry. In order for the PI(s) to electronically sign the ROUTING signature, all compliance questions must be answered. Only users logged in as the PI on the record will have access to the Sign the Record hyperlink. This hyperlink is available in the footer of every page.

1. Click on the Sign the Record Hyperlink
2. Read and ensure your concurrence with the language provided.
3. Click the *I Sign* button

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<a href="#">General</a>	<a href="#">Projects</a>	<a href="#">Approvals</a>	<a href="#">Attachments</a>	<b>PI Signature</b>	<a href="#">Division Action</a>	<a href="#">SPO Action</a>	<a href="#">Terms &amp; Cond</a>	<a href="#">D</a>
<b>Record ID</b>	MSN100246	<b>Document Type</b>	Hatch					
<b>Contact PI</b>	VIRNIG,NICOLE G	<b>Sponsor Name</b>	National Institutes of Health					
<b>Short Title</b>	test	<b>Status</b>	6-Completed					

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**Principal Investigator Signature for Proposal**

In signing, I certify that I am a Principal Investigator on the above referenced proposal or award and understand that by clicking on the "I Sign" button below, I agree to this text. I certify that I have identified all space, personnel, equipment and budgetary needs associated with the proposal or award, and that the proposal or award and this form are accurate and complete in all regards, including technical matters, adherence to sponsor's guidelines, budget and required clearances. I certify (1) that the information submitted within the application is true, complete and accurate to the best of the PI's knowledge; (2) that any false, fictitious, or fraudulent statements or claims may subject the PI to criminal, civil, or administrative penalties; and (3) that the PI agrees to accept responsibility for the scientific conduct of the project and to provide the required progress reports if a grant is awarded as a result of the application.

**PI Signature performed by**

**PI Signature Date & Time**

The second signature on this page indicates your agreement with University requirements, Federal regulations, and Sponsor terms for this project. If you believe you can commit to these statements, you may click the *I Sign* button indicating Principal Investigator Signature for the Award at this time.

## VI. ROUTE

### 12. **Route the Record:**

Routing the record to another user transfers ownership to one who will facilitate the approval process or who will provide the rest of the information needed to complete the record. Please refer to your department or division for specific direction to whom the record should be routed.

1. Click the *Route to Another Person* button at the top of the General tab or in the footer of any page.
2. Enter any comments that you wish the new recipient to receive
3. Select to whom you are routing the record.
  - a. Select to *Route to a Specific Person* button to launch a lookup tool for finding any person on campus. Selecting and verifying this person will trigger an email to that person and the addition of the record to that user's MY WISPER worklist.

OR

- b. Select the *Route to the Owning Division* button which select those users with Division Role Authority and notifies them that the record is ready for their action.

**Route Ownership of this Record**

**Routing note to recipient**

**Record currently owned by**     SOBEK,CAROLA

Click here to Route to a specific person..

Route to 19-COLLEGE OF ENGINEERING

Cancel

You will be sent to the History tab at which time you can select the Sign Out link on the top right of the page or select the MY WISPER link on the bottom of the page to continue further actions.