

University of Wisconsin Grants Project Desk Reference

WISPER – Request Project ID in an Advance of Award

WISPER facilitates the request for Projects to be set up in advance of the award being received and fully executed. **After all of the project details have been collected, the PI has signed the Award Signature and the Division has signed the Award Signature, the items are in place for this request to occur.** This Desk Reference walks through the process for making the request via an approval request to the division using the “Request advance award setup” approval type and the Division Action page informing RSP. Refer to the “Project Details” desk reference in order to confirm you have met the requirements detailed above.

DEPARTMENT OR PI ADVANCE AWARD ACTIONS

I. 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.
2. Locate the record for which you want to request the advance Project IDs using your MY WISPER worklist or by the Search page.

II. Complete the Project & Protocol Details requirements

1. Instructions for this step are separately located on the WISPER page <http://www.rsp.wisc.edu/WISPER/>

III. Request Approval to the Division

1. Select the Approvals tab
2. Click the Add Approval button
3. Using the drop down box for approval type, select “Request Advance Award”.
4. Enter additional justification or information to assist the Division in their review in the Approval Text box. Note that each Division may require additional justification, attachments or information in order to process this request. Please contact them if you are unsure of your Division’s requirements.
5. Select the Administering Division from the Division Drop down.
6. Click the Add Approval button.

Add Approval

Requested By	BALSER,TERESA C	Request Date	01/12/08 5:05PM	Sequence	2
Approval Type	<input type="text"/>				
Approval Request	<input type="text"/>				
Approver Type	<input type="text"/>				
Requested Approver	<input type="text"/>				
	Business Unit UWMSN				
	<input type="button" value="Add Approval"/> <input type="button" value="Cancel"/>				

Approval Request

- \$0 PI Appt with IP Obligations
- Chair Approval
- Division Approve Terms
- FA_WAIVER
- LEGAL Review
- Other
- Other Dept or Div Resource
- PI Approve Terms
- PI Signature
- Request Advance Award Setup
- Revised Budget
- Revised Budget to RSP
- WARF Review

DIVISION ADVANCE AWARD ACTIONS

I. 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.
2. Navigate to your MY WISPER worklist.
3. In the “Select Worklist” drop down, choose “to my division role”. The record pending the Advance Award will appear in the Approvals section of the worklist. Select the record.

II. Review Approval for an Advance Account:

1. Select the Approvals tab and locate the requested approval for the “Request Advance Award Setup.”
2. Click the details hyperlink to take you to the approval detail page.
3. Read the approval details, make comments if necessary, and click the “Approve” button. If you need additional information, you may *Submit Comment Only* or *Deny* at this time to return the record to the requester and seek additional information

III. Request Advance set up of RSP:

1. Select the Division Action tab.
2. Ensure that the division award signature has been executed.
3. Scroll to the bottom of the page to locate the *Validate to Req Adv Account* button. Clicking this button will run validations to ensure that all necessary information is included on the record before making the request of RSP.
4. Correct any identified errors and repeat the validation process until the record passes the Advance Account validation.
5. Select the *Request Advance Account of SPO* button. A page will open to verify this request. Click “Process Record” to proceed. The record has been submitted to the current RSP owner for processing. Award and Project information will be reported to you via email

<input type="checkbox"/> Override Electronic Signatures	
Validate to Submit	Submit to SPO
Validate to Req Adv Account	Request Advance Account of SPO
Validate to Req Project /Award Finalized of SPO	Request Project /Award Finalized of SPO