

**University of Wisconsin - Milwaukee
Grants Project Desk Reference
WISPER – Request an Advance Account (Backstop)**

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WISPER facilitates the request for an Advance Account. 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 SPO. 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.rsa.uwm.edu/WISPER/>, select the Log in to WISPER button, then enter your PantherID and password. You will be directed to your MY WISPER page.
2. Locate the record for which you want to request the Advance Account using your WORKLIST page or by the Search page.

II. Request Approval for an Advance Account:

1. Select the Approvals tab
2. Click the Add Approval button
3. Using the drop down box for approval type, select “Request Advance Award Setup”.
4. Enter additional justification in the Approval Text box.
5. Select the Administering Division from the Division Drop down.
6. Click the Add Approval button.
7. Note that additional justification for the request may be needed. Uploading documentation from the sponsor to the Attachments section can facilitate this approval. Note that your division may have additional requirements that need to be met prior to submitting this request.

Add Approval

Requested By	Harris, Mark	Request Date	01/23/08 2:44PM	Sequence	1
Approval Type	Request Advance Award Setup				
Approval Request	Requesting that the Division approve an Advance Award for this record because...				
Approver Type	Division	Division	48-College of Letters & Science		
Requested Approver	48-College of Letters & Science		Add Approval	Cancel	

DIVISION ADVANCE AWARD ACTIONS

I. Login & Select the WISPER record:

1. Navigate to the WISPER login page via <http://www.rsa.uwm.edu/WISPER/>, select the Log in to WISPER button, then enter your PantherID and password. You will be directed to your MY WISPER page.
2. 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.

III. Request an Advance Account to RSA.

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 RSA.
4. Correct any identified errors and repeat the validation process until the record passes the Advance Account validation.
5. When the record is ready to be submitted to RSA and the record has been reviewed to the division’s satisfaction, click the “Request Advance Account of SPO” button.
6. A page will open to verify this request. Click “Process Record” to proceed. The record will be submitted to the current RSA owner for processing. Award and Project information will be reported to you via email

