UNIVERSITY of WISCONSIN
UWMILWAUKEE
Office of
Sponsored Programs

QUICK GUIDE:
CREATING A WISPER RECORD

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All proposals to extramural sponsors require a WISPER record and department and division approval. Instructions follow below on how to create and route a WISPER record. Questions related to the creation and routing of WISPER records may be directed to the Office of Sponsored Programs (OSP) Pre-Award Specialist assigned to your department or division.

A. Login

1. Navigate to WISPER and enter your PantherID and password.
2. Click UW WISPER in the menu box on the left side of the page.
3. Click "MY WISPER" in the UW WISPER Main Menu.
4. Click the "Create New Record" button at the top of the page.

B. Enter Data

1. Short Title: Type in a working title for your project
2. Contact PI: Autofills with your name
3. Department ID:
   a. Click the "Add Department" to Record button.
   b. Type your department name in the "Any Part of Department Name" box and click "Search."
   c. Click the blue link of the department you want to select. Please be certain you are clicking the name of the correct department; a number of UWM departments have very similar names.
4. Business Unit: This should autofill with UWMIL; if not, type it in.
5. Sponsor:
   a. Click "Add Sponsor to Record button"
   b. Type the sponsor's name in the "Any Part of Sponsor Name" box and click Search.
   c. Click the blue Sponsor ID hyperlink for your project's sponsor.
6. Click the Create New Record button (this creates the record in the WISPER system)

C. Enter Basic Information

1. Official Proposal Title: Type the full title of your project.
2. Short Title: Automatically appears in the record.
3. Proposal Type: Automatically selects "New." Be certain to change the "Proposal Type" if "New" is not appropriate.
4. Administering Department: Automatically appears in the record.
5. Document Type: Click the drop-down box to select the appropriate document for your submission (grant, fixed-price contract, cost-reimbursable contract, etc.).
6. Begin Date and End Date: Enter the start and end dates for your project.

D. Submission Instructions

1. Sponsor Deadline: Enter the date in which proposals are due to the sponsor.
2. Submission Method: Select the appropriate submission method for your proposal.
3. Sponsor Program Number: If the sponsor has a Program Number for competition, please enter the data in this field.
4. UWM Campus Contact: If someone is assisting you with developing your submission and can answer questions related to the proposal and budget, please insert their name in this section. To add a name:
   a. Click Add Campus Contact
   b. Click Search
   c. Click the person's name
   d. To change the Campus Contact, click Change Campus Contact and repeat steps a-c above
5. Campus Phone: Enter the Campus Contact's phone number
6. Submission Instructions: Insert any instructions for submission to OSP staff using this field.

E. Compliance

Required Clearances: Answer each question by selecting Yes or No. All questions must be answered before you can sign the record.

F. Personnel

1. Name: Use this function to add any UWM personnel listed in the proposal.

   a. Click “Add Other Personnel to Record” and type all or part of the name of the person to be added to the record.
   b. Click “Search.”
   c. Click the person’s name.
2. Project Role: Click the drop-down box and select the person’s role on the project.
3. To add another person, repeat steps 1 and 2 above; to delete personnel, click the Trash Can icon.

G. Proposed Budget

1. Direct Costs: Enter the direct costs for the entire project from the budget.
2. F&A Costs: Enter the indirect costs for the entire project from the budget.
3. Cost Sharing Included: If yes, click the drop-down box and select the appropriate type.
4. Cost Sharing Amount: Enter the cost-share amount.
5. Cost Share Comments: Enter any comments regarding the cost share.
6. F&A Rate: Insert the appropriate F&A Rate for the submission.
7. On Campus: Autofills with “Yes.” If your project will occur off-campus, be certain to change it to “No.” Please be certain to review UWM’s definition of off-campus before selecting “No.”
8. Outgoing Sub-agreement(s): Indicate whether your project will have subawards.

H. Attachments

Typically, investigators must attached a budget, budget justification, and project summary or project description. Be certain to include any files that require an institutional signature. All file types can be uploaded, including Excel and PDF files. Use meaningful file names and limit length to 50 characters.

1. Click the “Attachment” tab at the top of the page.
2. Click “Upload Attachment.”
3. Click “Browse” and select the file for upload.
4. Click “Upload.”
5. File Description: Enter a description of the document (e.g., research plan, budget)
6. Add Another Attachment: Click to upload another document and repeat Steps 2-5 above.
7. To delete an attachment, click the Trash Can.

I. Principal Investigator Signature

1. Click the “Sign the Record” hyperlink at the bottom of the General page.
2. Principal Investigator Signature for Proposal: Read the statement and click the “I Sign” button.
3. The PI’s name and the signature date and time are stamped on the General page and Document History page.

J. Department Chair Approval

1. Click the “Approvals” tab at the top of the page.
2. Click the “Add Approval” button – DO NOT click “Route to a Specific Person.”
   a. Approval Type: Click the drop-down box and select “Chair Approval.”
   b. Approval Request: Autofills with a general request statement; the message may also be edited and personalized.
   c. Select Employee: Click this button, type all or part of your department chair’s last name, and click “Search.” Be careful when selecting your department chair’s name and that it is correct.
3. Click “Add Approval” button again to review the request for approval.
4. WISPER automatically sends an e-mail to the department chair requesting approval of the record.
5. WISPER sends an e-mail notification to you once the department chair has approved the record.

K. Division Approval (Except PIs in Letters & Science—See Below)

1. Select the General tab at the top of the page.
2. Scroll to the bottom of page and click the “Route to Another Person” button.
3. Click on the name of your college or division – DO NOT click “Route to a Specific Person.” Again, be certain that the division listed on the button is your division. If not, go back to Step B.3.; the department name you selected was not correct.
4. The record is sent to the Dean’s office for approval and submission to the UWM OSP office.

Division Approval for Letters & Science PIs:

1. Select the “Approvals” tab at the top of the page.
2. Click on “Initiate New Approval Request.”
3. Select “L&S Business Office Approval” for the “Approval Type.”
4. Click on “Select Employee,” type “Patricia Kissinger,” and select the first entry (UDDS of 480100).
5. Click on “Add Approval.” The L&S Business Office will review and approve the record and then forward for approval by the appropriate Associate Dean of Research.