

<p>University of Wisconsin - Milwaukee Grants Project Desk Reference WISPER – Record Creation for Principal Investigators</p>
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WISPER - Record Creation for Principal Investigators

Once a Pre-Proposal has been submitted and accepted by the agency, a PI may receive an invitation to submit a full proposal. This desk reference will go through creating a record for a full proposal and linking it to the record for the pre-proposal.

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CREATE NEW RECORD

1. Login:

- 1 Navigate to the WISPER login page via <https://uwm.edu/officeofresearch/wisper/>, click the “Log in to WISPER” button, then enter your PantherID and password. You will be directed to the UW WISPER page.
- 2 Click on “My WISPER.”
- 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 – your name should already appear
 - c. Department
 - d. Sponsor
- 2 Click “Create Record” to open the General Information Page on which you can enter additional information

Create New Records Here.

Short Title

Contact PI Harris, Mark

Department

Dept ID

Sponsor

Sponsor Not In List:

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

GENERAL INFORMATION PAGE

Note that you now have the WISPER ID number available to you in the header. This number can be used to track this record. In addition, this record can always be found in your My WISPER page under "Records for which I am the PI." The General page captures most of the basic information about your record.

3. Basic Information:

- 1 Enter information in as many of the following fields as possible:
 - a. Official proposal title
 - b. Start and End dates
 - c. Proposal type
 - d. Document type
- 2 Because this record will be related to the WISPER record you did for the Pre-proposal, click the "Add Related Document" button and enter in the record ID of the record that was created for the Pre-proposal. This will link the two records together.
- 3 Note that the contact PI, department, and Sponsor also may be changed in this section.

General		Projects	Approvals	Attachments	SPO Action	Terms & Cond	Document History	
Record ID	MIL101874	Document Type	Grant					Wisper Help
Contact PI	HARRIS,MARK T	Sponsor Name	US DEPT OF HEALTH & HUMAN SERVICES					
Short Title	Demo for Desk Reference	Status	1-In Process					


Basic Info

<p>Contact PI HARRIS,MARK T <input type="button" value="Change Contact PI"/></p> <p>Official Proposal Title <input type="text" value="Demonstration for UWM Desk Reference - January 18, 2008"/></p> <p>Short Title <input type="text" value="Demo for Desk Reference"/></p> <p>Administering Dept 340505 Research Genrl Administration <input type="button" value="Change Department on Record"/></p> <p>Begin Date 01/18/2008 End Date 01/17/2012 <input type="text" value="01/18/2008"/> <input type="button" value="BT"/> <input type="text" value="01/17/2012"/> <input type="button" value="BT"/></p> <p>Sponsor US DEPT OF HEALTH & HUMAN SERVICES <input type="checkbox"/> Sponsor Not in List <input type="button" value="Change Sponsor on Record"/></p> <p>Primary Sponsor (Optional) <input type="checkbox"/> Primary Sponsor Not in List: <input type="button" value="Add Primary Sponsor to Record"/></p>	<p>Outside Activities No Report Submitted Effort Training Completed No</p> <p>Proposal Type <input type="text" value="New"/></p> <p>Document Type <input type="text" value="Grant"/></p> <p>Related Record <input type="button" value="Add Related Document"/> <input type="button" value="Remove Related Record"/></p> <p><input type="button" value="Remove Prime Sponsor"/> <input type="button" value="Save"/></p>
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4. Submission Instructions:








This section captures detailed sponsor submission instructions as well as designating a campus contact.

- 1 Enter the necessary data for the following fields:
 - a. Sponsor deadline – Full proposal deadline
 - b. Submission method
 - c. UWM campus contact – Select the person most likely to work on, be able to answer questions about, or generally facilitate the submission of the proposal..
- 2 If known, note the sponsor program number and reference number along with any detailed submission instructions.

Submission Instructions	
Sponsor Deadline	<input type="text" value="01/31/08"/>  Paper Copy to UW SPO <input type="checkbox"/>
Submission Method	<input type="text" value="Electronic Submissior"/> Sponsor Program Number <input type="text"/>
	Sponsor Reference Number <input type="text"/>
Campus Contact	HARRIS,DAVID Change Campus Contact
Campus Contact Phone	<input type="text" value="414/229-5667"/> DNH@UWM.EDU
Submission Instructions	<input type="text"/>

5. Compliance:

All compliance questions must be answered before the PI will be able to sign the record. Answer each question by selecting YES or NO.



Compliance	
Required Clearances - Does the project involve:	
<input type="text" value="Yes"/> 	toxic, infectious or carcinogenic/mutagenic material of proven or potential hazard to humans, other animals, or to plants? Use recombinant DNA technology?
<input type="text" value="No"/> 	use of human subjects or human tissue?
<input type="text" value="No"/> 	use of vertebrate animals?
<input type="text" value="No"/> 	involve human pluripotent stem cells?
<input type="text" value="No"/> 	action involving space, remodel, or construction?
<input type="text" value="No"/> 	potential environmental impacts which require review under the Wisconsin Environmental Policy Act?
<input type="text" value="No"/> 	funding primarily dedicated to building, renovations, or equipment?
Enter Protocol Certification Details Here	

6. Personnel:

The personnel section allows the capture of information about additional employees working on the project along with the ability to designate project roles such as Co-Investigator, Key Personnel, Fellow, etc.. If the record has multiple PIs, all PIs must be entered at this time. Entry of any other personnel is optional.

- 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 at the far right of each personnel line.

Personnel

Name	Project Role	Outside Activities Report Submitted	Effort Training Completed	
Harris, Mark	Principal Investigator	No	No	
Harris, David	Key Person			

Add Other Personnel to Record

7. Proposed Budget:

- 1 Enter the proposed budget, F&A rate, and cost sharing information. The Total Costs will be calculated based on the amounts in the Direct and F&A fields.

Proposed Budget

Direct Costs	<input type="text" value="100,000.00"/>	Cost Sharing Included	<input type="text" value="Mandatory"/>	10% PI EFFORT DURING ACADEMIC YEAR PROJECT ASSISTANT FROM DEAN
F & A Costs	<input type="text" value="47,700.00"/>	Cost Sharing Amount	<input type="text" value="50,000"/>	
Total Costs	147,700.00			
F & A Rate	<input type="text" value="47.7"/> %			
On Campus	<input checked="" type="radio"/> Yes <input type="radio"/> No	Cost Share Comments		

8. Outgoing Subagreements:

- 1 If there will be any outgoing subagreements between UWM and another institution, choose Yes. If there will not be, choose no. This field is mandatory.

The screenshot shows a web form with a dropdown menu for the field "Outgoing Sub-agreement(s)?". The dropdown is currently open, showing two options: "No" and "Yes". Above the dropdown, the text "(Invalid Value)" is visible, indicating a validation error. Below the dropdown, there are labels for "Keywords" and "Keyword".

9. Keywords/Comments:

- 1 The only requirement for the Keyword field is that if this proposal is related to the "Return on Investment" for an RGI Award, enter "RGI" as a keyword. However, keywords assist in tracking research in major scientific areas and your School/College may request that you enter keywords to describe your project.. Enter multiple keywords separated by a comma or semi-colon.
- 2 Click the "Add Comments" button to access a large text field, which can be used to enter any information that you wish to communicate to others accessing the record.

The screenshot shows a web form with a text input field for the "Keyword" field. The input field contains the text "microbiology; amoeba lifecycle". Below the input field, there are two buttons: "Add Comments" and "Print".

ATTACHMENTS

Attach your budget, scope of work and any other relevant information so that the appropriate administrators may review.

10. Upload Attachments:

- 1 Click the attachment 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 multiple attachments click the "Add another attachment" hyperlink.
- 6 To delete an attachment, click on the trash can next to the Upload Attachment button.

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Upload Attachment	File Description	
1 <input type="button" value="Upload Attachment"/>	<input type="text"/>	Add another attachment

[General Info](#)

[Route to Another Person](#)

[Attachments](#)

[My Worklist](#)

[Search Page](#)

PRINCIPAL INVESTIGATOR SIGNATURES

Principal Investigators will be required to verify the information provided in the record prior to routing the document to OSP. This signature may be provided immediately following the initial data entry or at any time prior to submission to OSP. **In order for the PI(s) to electronically sign the record, all compliance questions must be answered.**

11. Electronically Sign for the Proposal:

- Click on the "Sign the Record" hyperlink at the bottom of the General page. This will open the PI Signature page.
- Read the statement to which you are attesting.
- Sign for the proposal by clicking the "I Sign" button.
- Verify that the PI name along with the date and time appears on the Signature Page.

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

12. Electronically Sign for the Award:

Below the Signature for Proposal is the Principal Investigator Signature for Award. As advised by your respective department and/or School/College, you have the option at this time to read and sign the award terms and conditions. In order for the PI to sign the Award signature, the Proposal signature must have already been signed.

Principal Investigator Signature for Award	
<p>I agree to disclose promptly to the University any invention, computer software or mask work (collectively, "Project Intellectual Property") made by me in whole or in part, whether solely or jointly with others, during and in the course of the Project. If Project Intellectual Property is funded in whole or in part by a federal agency or if an agreement negotiated by the University for the conduct of the Project requires the University to grant rights in Project Intellectual Property to a third party, I agree that I will, if requested, assign rights to such Project Intellectual Property to the University's designated intellectual property management organization and will execute all documents necessary to secure protection for Project Intellectual Property, and to establish the federal government's or any other party's rights therein. I confirm that I am now under no obligation to any other person or extramural sponsor which is in conflict with my responsibilities as set forth above. I agree that the University reserves the right to make and use, for educational or research purposes, any intellectual property or material made by me in whole or in part, whether solely or jointly with others, during and in the course of the Project.</p>	
<p>I agree to be responsible for assuring that all persons participating in the Project, other than clerical or non-technical persons, prior to commencing work on the Project have signed a copy of a document agreeing to essentially the same obligations as set forth above. (PI may use either a copy of the above language or may use the universal project participant statement found at http://www.graduateschool.uwm.edu/forms-and-downloads/researchers/intellectual-property-agreement.pdf.)</p>	
<p>I have read and I hereby accept the terms and conditions of any agreement negotiated by the University for the conduct of the above-referenced Project. I agree that I will comply with the provisions of and will cooperate in assuring that the University's obligations to fulfill those terms are met.</p>	
<input type="button" value="I Sign"/>	PI Signature performed by
	PI Signature Date & Time

After signing each statement, the PI name along with signature date and time will be stamped on the page as well as on the History page. The PI Signature page is only accessible to Principal Investigators; others will access the History page to verify that the signatures have been executed. If at any point in the process, the Division or OSP would like additional assurance regarding particular terms or the PI's ability to perform the terms, an APPROVAL should be added. (Please refer to the "Request an Approval" desk reference).

12. Route the Record:

- 1 After completion of the PI signature process, you will need to route the record to your School/College who will also sign the record and submit it to OSP for submission to the sponsor. Note that you may also need to request approval of your department chair/center director or other office per instructions from your School/College. Click the “Route to Another Person” button at the bottom of the PI Signature page.
 - 2 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 and the addition of the record to that user’s MY WISPER worklist.
- OR
- b. Select the Route to the School/College/Division button that select those users with Division Role Authority and notifies them that the record is ready for their action.

Route Ownership of this Record

Record currently owned by **Harris, Mark**

[Click here to Route to a specific person..](#)

[Route to 48-College of Letters & Science](#)

[Cancel](#)

Note that you may also need to request approval of your department chair/center director or other office per instructions from your School/College

After routing the record you can select the Sign Out link on the top right of the page or select the MY WISPER worklist link on the bottom of the page to continue further actions.