WISPER Overview for Principal Investigators in Nursing

WISPER facilitates the process of routing applications and agreements for extramural support by capturing the necessary data up and tracking through the generation of the award. As the Principal Investigator, you may be the initiator of record creation process. 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.   This desk reference should be utilized based upon the assumption that this is the first record created of its kind by the PI. 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.
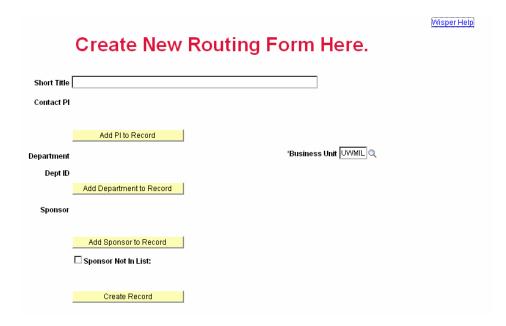
CREATE NEW RECORD

1. Login:
1 Navigate to the WISPER login page via **https://uwm.edu/officeofresearch/wisper/** to enter your PantherID and password. You will be directed to your MY WISPER page.
2 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 – working title for internal communication purposes
   b. Contact PI – your name should already appear
   c. Department - Enter 650100 in Dept ID field
   d. Sponsor – Search for and select Sponsor name from list
2 Click "Create Record" to advance to enter more information

Create New Routing Form Here.

Short Title [   ]

Contact PI

[Add PI to Record]

Department   'Business Unit [UWMIL] 🔍

Dept ID

[Add Department to Record]

Sponsor

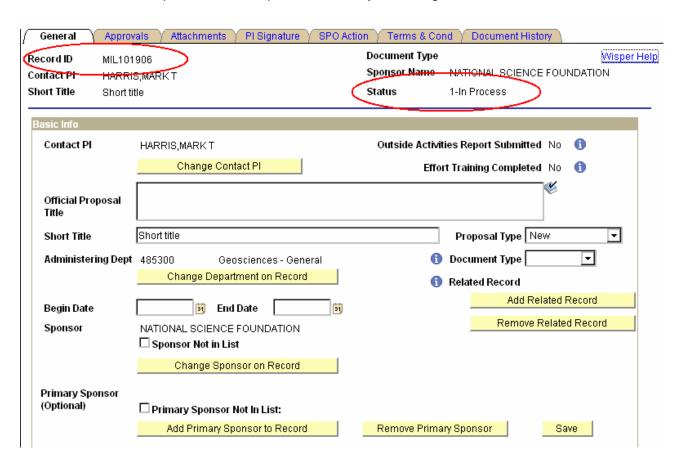[Add Sponsor to Record]
☐ Sponsor Not In List:

[Create Record]

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

GENERAL PAGE INFORMATION

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

3. **Basic Information:**
    1   Enter as much of the following information as possible:
        a.   Official proposal title
        b.   Start and End dates
        c.   Proposal type
        d.   Document type (usually Grant)
    2   If the current record is related to an already existing WISPER record, click the "Add Related Document" button for the option of linking this record to an existing WISPER record such as a record for which the current record is a supplement or continuation, a CDA or MTA preceding the current record, or any other relationship you can think of.
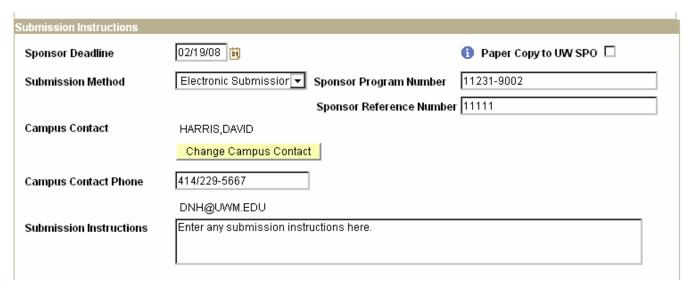   3   The contact PI, department, and Sponsor also may be changed in this section.

*This record can always be found in your My WISPER page under "Records for which I am the PI."
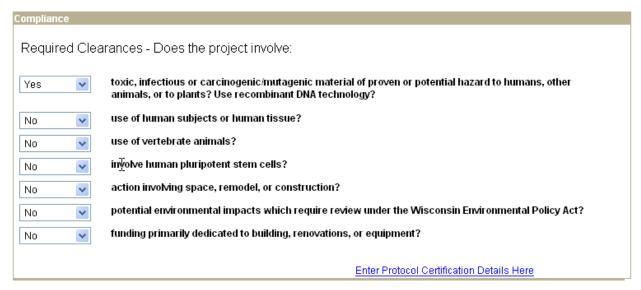
4. Submission Instructions:

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. UWM campus contact - Search for and select the name of anyone assisting you in the development of this proposal or other WISPER document

    2   If known, note the sponsor program number and reference number along with any detailed submission instructions. NOTE: If the Sponsor is UWM Foundation, enter UWM Foundation Account Number (####.##) in the Sponsor Reference Number field.

Submission Instructions

Sponsor Deadline	02/19/08 ⓘ Paper Copy to UW SPO ☐
Submission Method	Electronic Submission ▼ **Sponsor Program Number** 11231-9002
	Sponsor Reference Number 11111
Campus Contact	HARRIS,DAVID
	[Change Campus Contact]
Campus Contact Phone	414/229-5667
	DNH@UWM.EDU
Submission Instructions	Enter any submission instructions here.

5. Compliance:

All compliance questions must be answered before the PI will have the ability to sign the record. Answer each question by selecting Yes or No.

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 listing of additional employees working on the project as well as role designation such as Co-Investigator, Fellow, and other project roles. If the record has multiple PIs, all PIs must be entered at this time. Entering other personnel is optional.
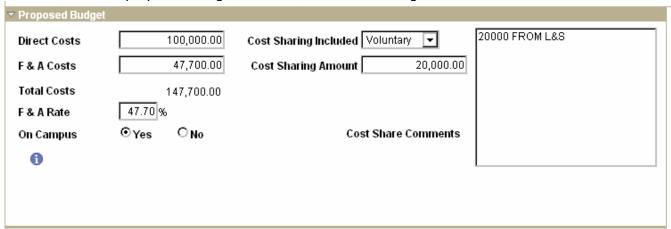
1 Click the "Add Other Personnel to Record" button which will open a new page allowing an employee search by name or Dept ID (UDDS).
2 After employee selection, identify their project role from the dropdown menu.
3 Repeat this process for as many personnel as you want to enter.
4 To delete personnel from the record click the trashcan to the right of the employee name.

7. Proposed Budget:

If known, enter the proposed budget, F&A rate, and cost sharing information

8. Keywords/Comments:

1 If this proposal is related to the "Return on Investment" for an RGI award, enter "RGI" as a keyword
2 In addition, keywords assist in tracking research in major scientific areas. Enter relevant keywords separated by a comma or semi-colon.
3 Click the "Add Comments" button to access a large text field, which can be used to enter any information wished to be communicated to others accessing the record.

This record can always be found in your My WISPER page under "Records for which I am the PI."

ATTACHMENTS

Any type of file attachment can be uploaded via this page including PureEdge files, budget spreadsheets for review, and the complete application.

9. Upload Attachments:
1   Navigate to 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, enter a file description such as "draft narrative" or "proposal abstract," or "budget justification."
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.

PRINCIPAL INVESTIGATOR SIGNATURE

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 at any time following the initial data entry as described above. **In order for the PI(s) to electronically sign the record, all compliance questions must be answered.**

10. Electronically Sign for the Proposal:
1.   Click on the "Sign the Record" hyperlink at the bottom of the General page. This will open the PI Signature page.
2.   Read the statement to which you are attesting.
3.   Sign for the proposal by clicking the "I Sign" button.
4.   Verify that the PI name along with the date and time is stamped. If physical signatures are required on a record due to the PI(s) not being in the appointment tables, the PRINT button should be selected on the General page for a paper copy of the record

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. Further, I certify (1) that the information submitted within the application is true, complete and accurate to the best of my knowledge; (2) that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties; and (3) that I agree to accept responsibility for the scientific conduct of the project and to provide the required progress reports if an award is issued as a result of the application.

| I Sign |

PI Signature performed by

PI Signature Date & Time

11. Electronically Sign for the Award:

Below the Signature for Proposal is the Principal Investigator Signature for Award. If award terms and conditions are available at this time, PIs have the option to read and sign the award terms and conditions. In order for the PI to sign the Award signature, the Proposal signature must have previously been signed.

Principal Investigator Signature for Award

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.

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.)

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.

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 accessible only to Principal Investigators; others will access the Document History page to verify that the signatures have been executed.

ADD AN APPROVAL

12. Approval:

One way to share a record with another person is to add an approval.
1. Navigate to the Approvals Tab
2. Click the "Add Approval button." This will open the details page.

Add Approval

Requested By	Harris, Mark	**Request Date** 02/13/08 10:03AM	**Sequence** 1
Approval Type	[▼]		

Approval Request [   ]

Approver Type [▼]

Requested Approver

Business Unit UWMIL

[Add Approval]   [Cancel]

3. Use the Approval Type Drop Down to select an appropriate approval type or "other."
4. Click the "Select Employee" Button
5. Search for and select the name of the person with whom the record should be shared.
6. Click the "Add Approval" button. The main Approvals page will re-open with the newly requested approval documented with date and time.

Add Approval

Requested By	Harris, Mark	**Request Date** 02/13/08 10:03AM	**Sequence** 1
Approval Type	Chair Approval [▼]		

Approval Request Requesting your approval of this project under your department's administration - We are including Prof. Smith at 1 calendar month with full salary of $6.430 on the application from 7/1/07 through 6/30/12 with a 3% increase each year.

Approver Type Employee   [Select Employee]

Requested Approver

Business Unit UWMIL

[Add Approval]   [Cancel]

ROUTE THE RECORD
13. Routing:

After completion of the PI signature process, you will need to route the record to your Dean's office who will approve the record and forward to OSP for submission to sponsor or other processing.

1 Click the "Route to Another Person" button at the bottom of the PI Signature page.

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.
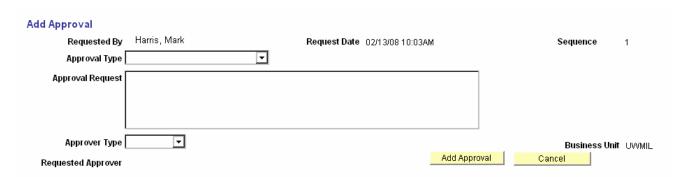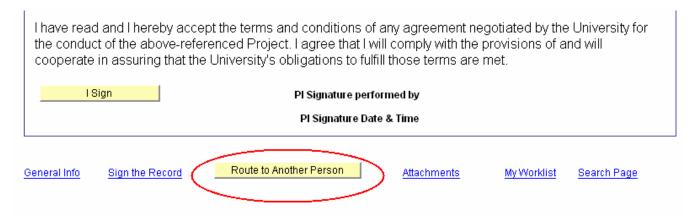
I Sign	PI Signature performed by
	PI Signature Date & Time

General Info   Sign the Record   Route to Another Person   Attachments   My Worklist   Search Page

2 Select the bottom button.
3 Note that the top button "Route to a specific person" will hardly ever be used at UWM.

Route Ownership of this Record

Record currently owned by   VANCO,MARGUERITE M

Click here to Route to a specific person..
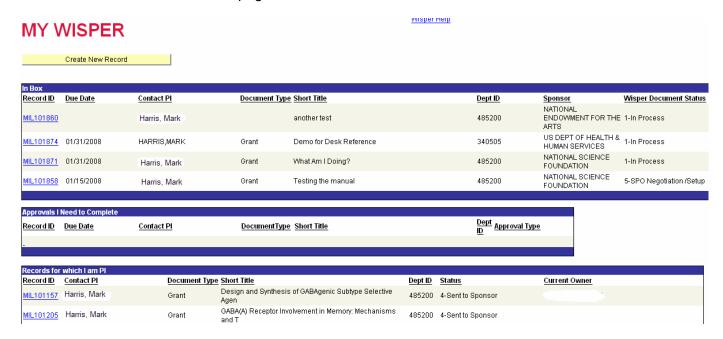
Route to 65-College of Nursing

Cancel

After routing, the record will be sent to your Dean's office and 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.

TRACK THE RECORD

14. Tracking the Status:

You can always track the status of the record using WISPER to see who is working on it and its status.
1   Navigate to MY WORKLIST which is your home page when you log into WISPER
     https://uwm.edu/officeofresearch/wisper/
2   Scroll to the bottom of the page & see the "Records for Which I am a PI"

MY WISPER

Wisper Help

| Create New Record |

In Box

Record ID	Due Date	Contact PI	Document Type	Short Title	Dept ID	Sponsor	Wisper Document Status
MIL101860		Harris, Mark		another test	485200	NATIONAL ENDOWMENT FOR THE ARTS	1-In Process
MIL101874	01/31/2008	HARRIS,MARK	Grant	Demo for Desk Reference	340505	US DEPT OF HEALTH & HUMAN SERVICES	1-In Process
MIL101871	01/31/2008	Harris, Mark	Grant	What Am I Doing?	485200	NATIONAL SCIENCE FOUNDATION	1-In Process
MIL101858	01/15/2008	Harris, Mark	Grant	Testing the manual	485200	NATIONAL SCIENCE FOUNDATION	5-SPO Negotiation /Setup

Approvals I Need to Complete

Record ID	Due Date	Contact PI	DocumentType	Short Title	Dept ID	Approval Type

Records for which I am PI

Record ID	Contact PI	Document Type	Short Title	Dept ID	Status	Current Owner
MIL101157	Harris, Mark	Grant	Design and Synthesis of GABAgenic Subtype Selective Agen	485200	4-Sent to Sponsor	
MIL101205	Harris, Mark	Grant	GABA(A) Receptor Involvement in Memory: Mechanisms and T	485200	4-Sent to Sponsor	

Additional information and help is available at:

https://uwm.edu/officeofresearch/wisper/ or

email WISPER-rsa@uwm.edu

or

call 414.229.3332