

<p>University of Wisconsin - Milwaukee Grants Project Desk Reference WISPER – Revised Budget</p>

WISPER – Revised Budget

In order to obtain external funding for their research programs, investigators must submit proposals to sponsors and have them approved for funding. This process includes the possibility of budget negotiation between the University and the Sponsor. WISPER facilitates the submission process for a revised budget which may be required by the Sponsor.

PI/PI SUPPORT 1

I. Login..... 1

II. Add Revised Budget Document as an Attachment: 1

III. Request Division Approval: 2

DIVISION 2

IV. Login:..... 2

V. Review Revised Budget Attachment 2

VI. Respond to Revised Budget Approval Request..... 2

VII. Request OSP Approval 3

<p><u>PI/PI SUPPORT</u></p>

- I. Login:**
1. Navigate to the WISPER login page via <https://uwm.edu/officeofresearch/wisper/>. Click the “Log in to WISPER” button and enter your PantherID and password. You will be directed to your MY WISPER page.
 2. Locate the record for which you would like to provide a Revised Budget on your MY WISPER worklist page or navigate to the Search page to locate the record.
- II. Add Revised Budget Document as an Attachment:**
- If the Revised budget is being submitted via Fastlane or other system to which the revised budget is already attached, skip this step and make reference to the budget as indicated in step III.*
1. Navigate to the Attachments tab.
 2. If attachments already exist, click the Add Additional Attachment hyperlink to add a blank space for this attachment.
 3. Click the “Upload Attachment” button.

4. Browse for the revised budget document on your computer and upload the file. (This process may take a couple of minutes depending on file size.)
5. Enter a file description on the main attachments page.

III. Request Division Approval:

1. Navigate to the Approvals tab.
2. To add a new approval, click the “Add Approval” button, which will open the Approval Details page.
3. Select the “Revised Budget” approval type from the drop down menu.
4. Enter any additional information in the Approval Request text box.
 - a. If the budget is not attached to the record due to its already being in an electronic system such as Fastlane, reference the system and any pertinent identifying information here.
 - b. Enter the submission instructions here.
5. Select the appropriate Division for approval from drop down menu.
6. Click the “Add Approval” button. The main approvals page will re-open with the newly requested approval documented with the date and time the approval request was made.

Add Approval

Requested By	Harris, Mark	Request Date	01/29/08 1:26PM	Sequence	1
Approval Type	Revised Budget				
Approval Request	Submission of a revised budget to this record. Please approve and ensure submission...				
Approver Type	Division	Division	48-College of Letters & Science		
Requested Approver	48-College of Letters & Science		Add Approval	Cancel	
				Business Unit	UWMIL

DIVISION

IV. Login:

1. Navigate to the WISPER login page via <https://uwm.edu/officeofresearch/wisper/>. Click the “Log in to WISPER” button and enter your PantherID and password. You will be directed to your my WISPER page.
2. Select your division worklist from the dropdown menu.
3. Open the record with the Revised Budget approval request from your “Approvals I need to Complete” list.

V. Review Revised Budget Attachment

1. Navigate to the Attachments tab.
2. Open and review Revised Budget document.

VI. Respond to Revised Budget Approval Request

The Approver has the choice to (1) *approve*, (2) *deny*, or (3) *submit comments only* on the requested approval for the revised budget. A *submit comments only* response stores the comments, but leaves the item on the user’s worklist for possible future action. The approver or any other participant can return to the record to enter responses 1, 2, or 3 at

any time. After being approved or denied, a record will still have the “Submit Comments Only” button active for additional comments to be added at any time.

1. Navigate to the Approvals tab.
2. Click the “Details” hyperlink to the right of the Approval to which you are responding. This will open the Approval Detail page.
3. Enter comments if needed.
4. Click the appropriate response to the request. This action will close the Approvals Detail page and return to the main Approvals page.

VII. Request OSP Approval

(Continue only if Revised Budget is approved by the Division).

1. Navigate to the SPO Action tab to note the OSP staff member to whom the approval should be routed.
2. Navigate to the Approvals tab.
3. To add a new approval, click the “Add Approval” button, which will open the Approval Details page.
4. Select the “Revised Budget to SPO” approval type from the dropdown list.
5. Enter any additional information in the Approval Request text box.
6. Lookup the OSP staff member identified in Step 1, unless otherwise directed by someone in the OSP office.
7. After all information has been entered, click the “Add Approval” button. The main approvals page will re-open with the newly requested approval documented with date and time. The OSP staff member will be notified and will process the record accordingly.

Add Approval

Requested By	KISSINGER,PATRICIA L	Request Date	01/29/08 1:30PM	Sequence	1
Approval Type	<input type="text" value="Revised Budget to SPO"/>				
Approval Request	<input type="text"/>				
Approver Type	<input type="text" value="Employee"/>	<input type="button" value="Select Employee"/>		Business Unit	UWMIL
Requested Approver	HARRIS,DAVID N	<input type="button" value="Add Approval"/>	<input type="button" value="Cancel"/>		