

Getting Started – Project Data Entry

Introduction for Project Directors & Other User Roles

REEport is accessed through the NIFA Reporting Portal at: <http://portal.nifa.usda.gov>.

Project Directors

Project Directors who are part of a Land Grant University and who wish to initiate formula projects must be set up first by their Site Administrators (SA) in order to access REEport. Once their SA sets them up as a new user, the PD will receive an email from REEport asking them to verify themselves and set their password (see “Logging In – First Time User Verification Process” below).

Project Directors who wish to enter project data on Non-Formula Projects (including Competitive Grants) fall into two categories: those who are part of an LGU or other NIFA partner institution (with an already existing “site” in REEport) and those who are independent Project Directors.

- PDs who are part of an LGU: You will need to be set up as a PD by your SA (see above).
- PDs who are independent/not part of an LGU or partner institution: This applies to Non-Formula Grantees only. You will be recognized by REEport as a PD based on the email that you submitted as part of your grant application. You will need to go through the “first time user verification process” explained below.

The PD role does have the ability to “submit” projects in REEport but only according to the permissions that have been set up by the Site Admin. For any project, there are two levels of submission permissions: one to the “institution review level” and one to the “submit to NIFA” level. All PDs have the default capability to submit to the first level, but SAs must choose to give them permission to actually “submit to NIFA.”

Other User Roles: Admin Support and Reviewer

There are two other user roles in REEport which require access to be granted by a Site Administrator. They are the “Admin Support” role and the “Reviewer” role. These two roles have various viewing and editing capabilities in order to support the overall workflow process, but neither have the “submit” capabilities of the Site Admin or Project Director.

Logging In – First Time User Verification Process

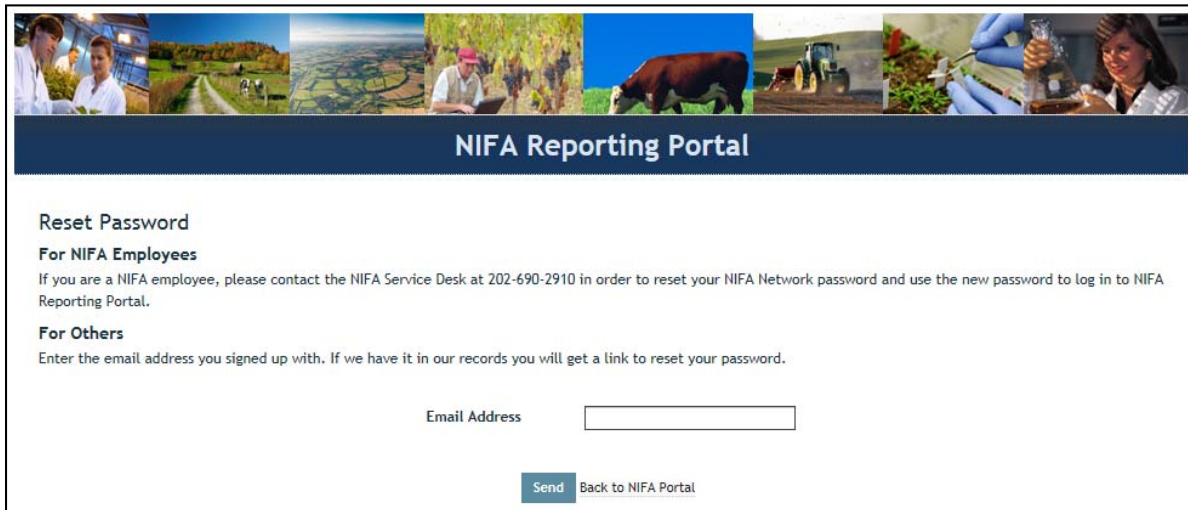
All users must go through a verification process in the portal if they have not logged in before (i.e. if they are not a previous user of REEport or have not logged into the portal for other purposes, such as the POW system or to access the Leadership Management Dashboard). You will know if you are an unverified user if you do not have a password, because only users who have set their own passwords are considered “verified.”

If you have never logged into the portal before and have not set your own password:

1. Enter your email and leave password section blank. Click “log in.”



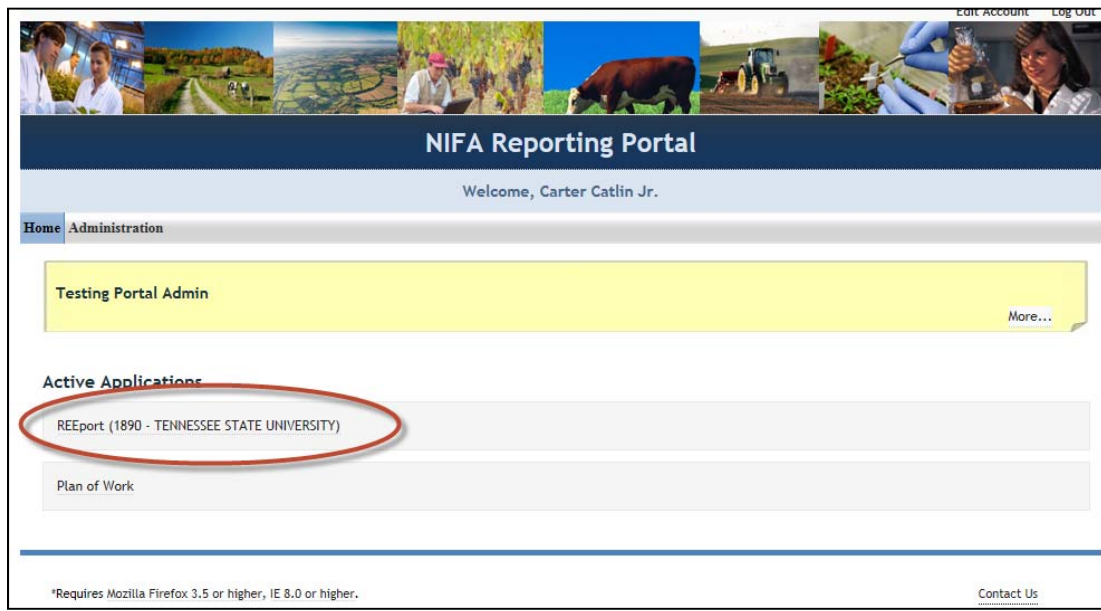
2. You will be asked to re-enter your email address and click “send email.”



3. In the email you receive (should arrive within 10 minutes), click the link provided. The link will take you to a page where you can set your own password.

4. After setting your password, log into the portal with your email and newly set password.

5. Under “Active Applications,” click the “REReport” link. (All REReport users will have a slightly different link name since the name of the link associates them with a particular institution.)



6. You will be brought to your REeport home page, where you have the ability to start new projects and manage existing projects:



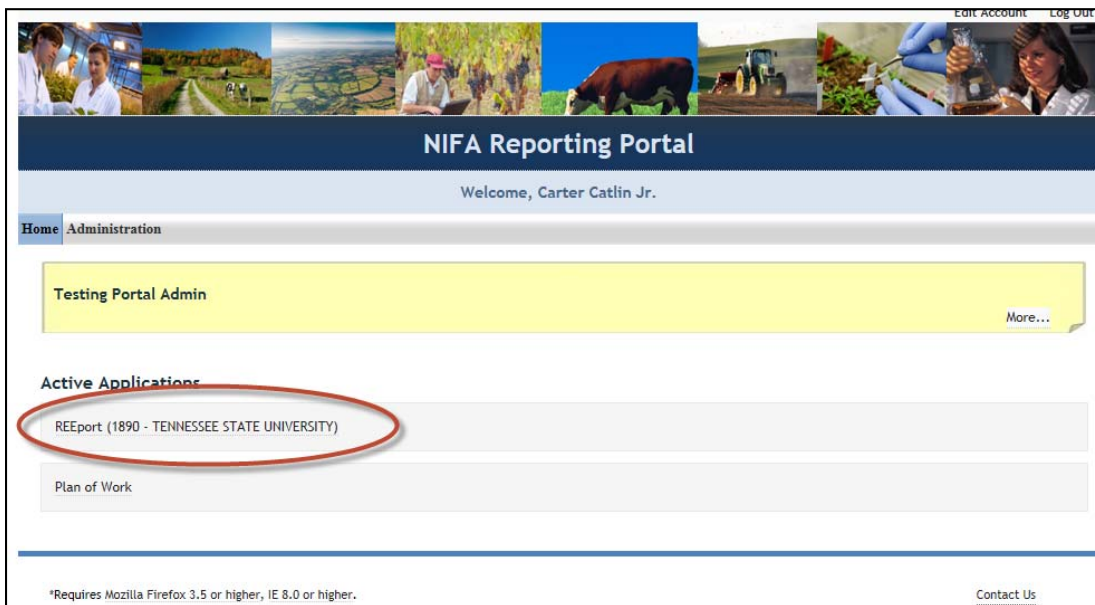
Logging In – Returning Users

1. At the portal login page, enter your email address and your password (set by you the first time you logged into Portal. Click “Log In.” (If you do not remember your password, click the “reset password” link at the top of the portal login screen and follow the instructions).



2. Click the “REEport” link that appears on your welcome page under “Active Applications. (All REEport users will have a slightly different link name since the name of the link associates them with a particular institution.)

Note: If you do not have a “REEport” link listed under your active applications, that means you have not yet been set up with a user profile; check with your Site Administrator, if you have one. If you do not have an SA, send an email to reeport@nifa.usda.gov.



3. You will be brought to your REEport home page, where you have the ability to start new projects and manage existing projects.



Navigating the Software

When moving from screen to screen in REEport, regardless of the module you're in (i.e. Project Initiation, Progress Report, etc.) you have the ability to use the menu bar at the top and also to use the navigation buttons provided at the top and bottom of each screen.

Example: When moving from "cover page" to "participants" you can click "next," which saves your work and moves you to the next page. Alternatively, you can click "save" which saves your work and keeps you on the cover page. To move to the Participants page, you could then click "Next" or "Participants" at the top of the menu bar. Both options are shown in these screenshots:

Option #1:

* Start Date * End Date **End of Cover Page**

Project Contacts

Project Director

Select from list of Project Directors:

First Name Middle Name Last Name

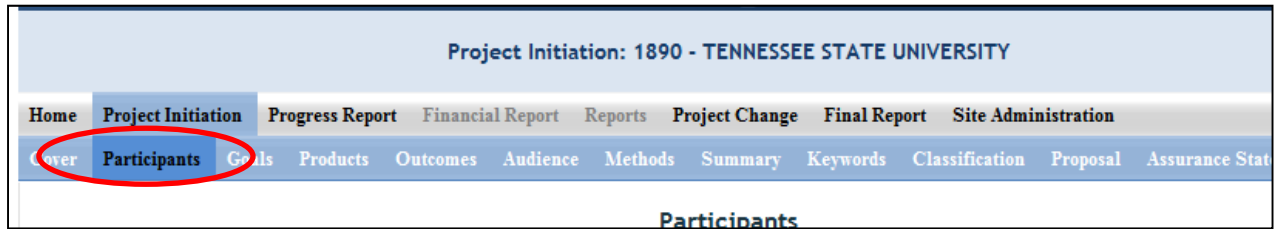
Email Address Phone Number

Site Administrator

Name : Carter Catlin Jr.
 Email Address : ccatlin@tnstate.edu
 Phone Number : 000-000-0000

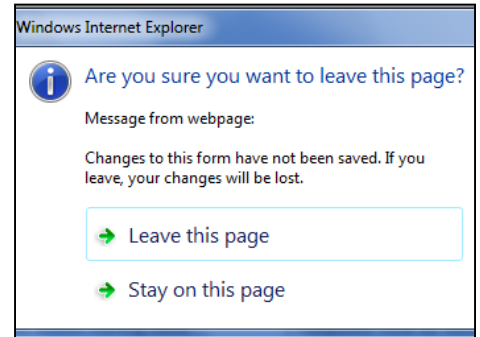
Save **Next »**

Option #2:



Important note if you choose option #2: Only the navigation buttons in REEport will save your work for you. If you do not click save and use the menu bar to move to the next screen (i.e. clicking “participants” on the menu bar to move from cover page to participants page) you will get the following message:

If you get this message, you MUST choose “stay on this page” so that you will have the option to save your work before moving to another page. If you choose “leave this page” your work will not be saved.



Finding, Editing, & Managing Projects

When navigating the software and moving from module to module and from project to project within those modules, it’s helpful to remember that every module is set up exactly the same in terms of HOW to find the project you want to work on.


Option #1: Your first option is to always use the search tool on the home screen of each module. This option is most helpful when you know the exact data to search for at least one of the fields (accession number, proposal number, PD name, etc.); it’s also helpful when you’re not exactly sure what status the project is in and therefore wouldn’t know which folder to look in.

A screenshot of a search form. It has five input fields: "Accession Number", "Project Number", "Proposal Number", "Performing Department" (with a dropdown arrow), and "Project Director". Below the fields are two buttons: "Search" and "Clear Search".

Option #2: Use the “expanded folder” views to see the list of projects in that particular folder. If you know, for example there are three projects you want to work on, one formula and two non-formula that are all in project initiation, you might find it most helpful to expand the “draft” folder and find those three projects within that folder.

23 Project(s) In Draft Stage								
Accession #	Project #	Grants.gov #	Proposal #	Title	Department	Project Director	Funding Source	View
(None)	iowKStest	(N/A)	(N/A)	Control of Food-Borne Pathogens in Pr...	(None)		HATCH/MU...	PDF
(None)	(None)	GRANT00469387	2008-03943	Developing Predictive Models for Iden...	Animal Science	Christopher Tuggle	NON FORMULA	PDF
(None)	(None)	(N/A)	(N/A)	(N/A)	(None)		STATE	PDF
(None)	(None)	(N/A)	(N/A)	(N/A)	(None)		HATCH	PDF
(None)	iowtest	(N/A)	(N/A)	working	U.S. Pork Ce...	Dorian Garrick	HATCH	PDF
(None)	iowtest	(N/A)	(N/A)	Initiating a state project by PD	Leopold Center	Gwyn Beattie	STATE	PDF
(None)	IOA-IOA...	(N/A)	(N/A)	Test AH project	Animal Science	Kathleen Delate	ANIMAL H...	PDF

Important Items to Remember when Moving through Modules in REEport (and this Manual)

- All of the instructions provided in the REEport system (help text is indicated by the  icon) and in the following manual sections (Project Initiation, Progress Report, Project Change, and Final Report) match. ***In this manual, the instructions are provided in the order that each data field is listed on the page after each screenshot shown.***
- No matter what module you are in, you can always go back to your home screen (click “home” on the top menu bar” to view the large module icons and click any of them to enter those modules. You can also move from module to module by using just the top menu bar; you do not need to go back “home” first.