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National Institute of Food and Agriculture
U.S. DEPARTMENT OF AGRICULTURE

REEport Site Administration Guide

NIFA Planning, Accountability, and Reporting Staff

Last Updated: November 2023

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INTRODUCTION

Recipients of capacity and competitive grant awards administered by the National Institute of Food and Agriculture (NIFA) are required to report project and program data to NIFA. The Research, Extension, and Education Project Online Reporting Tool (REEport) is NIFA's primary grant reporting system for NIFA-funded, non-capacity (competitive) projects. The system collects both technical and financial data related to NIFA-funded, non-capacity (competitive) projects and allows grantees to report significant accomplishments and impacts of their research, extension, and educational work.

Project initiations and reporting for projects funded by **competitive grants** must be completed in the REEport system, which is accessible through the [NIFA Reporting Portal](#). Within the REEport system, the project initiation forms and required report forms are completed and submitted to NIFA. The [REEport User Guide](#) contains the instructions and details the requirements for **competitive grant** project initiation and reporting in the REEport system as well as how to log-in and how to reset your password.

This **REEport Site Administration Guide** contains information and instructions for the Site Administrators of Partner Sites in REEport. This guide contains instructions related to REEport Site Administration and REEport User Management. Only REEport Site Administrators are permitted to perform the actions described in this document.

Project creation and reporting for projects and programs funded by **capacity grants**, including Hatch, Hatch Multistate, Evans-Allen, Animal Health and Disease Research, McIntire-Stennis, Renewable Resources Energy Act (RREA), 1890 Extension, and Smith-Lever(b)(c), must be completed in the NIFA Reporting System (NRS). The **NIFA Reporting System User Guide** and additional NRS resources are available on the [NRS Resources webpage](#). If you have any questions regarding capacity grant reporting, please email the NRS Help Desk (NRS@usda.gov).

If you have any questions about your role and what is expected of you as a REEport Site Administrator, please email the REEport Help Desk (Electronic@usda.gov).



PARTNER SITE ROLES AND PERMISSIONS IN REEPORT

The following table lists the REEport user roles available for Partner Site REEport users and the permissions they have in the REEport system. Please note that REEport workflows control which user roles have access to submit report forms to NIFA. See the [Workflow section](#) of this document for guidance on how to update your REEport site workflows.

Table 1 Partner Site REEport User Roles and Permissions

User Role	Permissions in REEport
Site Administrator (SA)	a. Has full control. b. Can view all projects and forms. c. Can edit any forms in Draft. d. Able to submit any form to NIFA. e. Can edit and submit REEport Financial Reports. f. Only role that has access to Site Administration functions, such as adding users, setting form workflows, etc. In other words, control over all aspects of site configuration.
Assistant Site Administrator (ASA)	a. Can view all projects and forms. b. Can edit any forms in Draft. c. Cannot submit forms to NIFA.
Project Director (PD)	a. Can edit the draft project and progress/final report forms if they are named the PD on the grant. b. Can create new State Project Initiation forms, and view/edit State Project forms they initiated. c. Cannot submit forms to NIFA unless the Site Administrator has set the workflows to allow it. d. Cannot complete and submit the REEport Financial Report unless the user is also assigned the Financial Administrator or Site Administrator role.
Financial Administrator	a. Can only access the Financial Report modules. b. Can edit the REEport Financial Reports. c. Cannot submit the REEport Financial Reports to NIFA unless the Site Administrator has set the workflows to allow it.
Authorized Organizational Representative (AOR)	a. Can edit the draft project and progress/final report forms if they are named the AOR on the grant. b. Can view other projects assigned to the site, but cannot edit them if they are not the named AOR.
Admin Support	a. Can create new State Project Initiation forms. b. Can view and make edits only on forms they created. c. Cannot submit forms to NIFA.
Reviewer	a. Can view all projects and forms in a read-only state as a PDF. No other permissions.



SITE ADMINISTRATION FOR PARTNER SITES

REEport Site Administrators are responsible for the Site Administration of their assigned REEport partner site(s). REEport Site As have access to the Site Administration module in REEport where they may view and update Site Administration settings. See the details below about each page of the Site Administration module.

ROLES

In the Site Administration module, the Roles page lists the REEport user roles and their assigned permissions. Site Administrators may review the permissions for each form type by selecting the applicable radio button. Please note that the permissions are not editable. See the [Partner Site Roles and Permissions in REEport section](#) of this document for a list of the roles and permissions.

DEPARTMENTS

In the Site Administration module, the Departments page lists the current Department Codes and Department Names for your organization. The Department Code is a number that is automatically assigned and tracked by REEport. The Department Name is created and labeled by the Site Administrator. Duplicate entries are not allowed.

As a Site Administrator, you cannot remove departments, but you are able to add new departments on this page by clicking the Blue Plus Sign button. After making any additions, click the “Save” button.

USERS

In the Site Administration module, the Users page lists the user accounts assigned to your REEport site. This page is view only and may not contain up-to-date information. User accounts are administered under the Administration module found on the NIFA Reporting Portal landing page. To review current users and make updates to users, you must navigate to the Administration module. See the [User Management for Partner Sites section](#) of this document for more details.

WORKFLOW

In the Site Administration module, the Workflow page lists the current workflows for your REEport site. As the Site Administrator, if a workflow update is necessary, you are responsible for updating the workflows. The workflows control whether the Project Director, Authorized Organizational Representative, and Financial Administrators can submit report forms directly to NIFA.

There are separate workflow settings for Project Initiation, Progress/Final Report, and Project Financial Reports. For each form type, you may update the workflow by selecting the applicable radio button and clicking “Save” at the bottom of the page. If you select “Only Site Administrator can submit”, the system will give the other user types the option to “Submit for Review” and the Site Administrators will be responsible for reviewing the pending submissions and submitting the report forms to NIFA. The “Submit to NIFA” button is on the “Submit” page of each report form.

Please note that no Formula Projects are active in REEport, so the settings listed for Formula Projects are no longer functional. All Formula/Capacity project reporting is completed in the NIFA Reporting System (NRS).

SITE PROFILE

In the Site Administration module, the Site Profile page has four subpages, including Site Administrator Profile, Authorizing Signatures, Funding Sources, and Message Board.

Site Administrator Profile

On the Site Administrator Profile subpage, the Primary Site Administrator is identified. If an update is necessary, you may select a new Primary Site Administrator from the dropdown list and click the “Save” button. The dropdown only includes REEport users that are already assigned the Site Administrator user role. See the [user Management for Partner Sites section](#) in this document for instructions on how to add or update user roles.

Authorizing Signatures

On the Authorizing Signatures subpage, the individual(s) at your organization who provide signatory authority for submission of both the Project Initiation and Assurance Statement forms to NIFA are identified. If an update is necessary, you may update the editable fields on this screen under the Project Initiation and Assurance Statement sections. Click the “Save” button at the bottom of the subpage to save any edits.

Please note that the Program of Research sections are disabled on the subpage because they relate to Capacity-funded projects. All Formula/Capacity project and program reporting is completed in the [NIFA Reporting System \(NRS\)](#).

Funding Sources

On the Funding Sources subpage, there a non-editable, listing of the allowed funding types for your organization. If a funding source is not allowed, it will not be presented as an option when creating a new project. All Formula/Capacity funding sources are marked “No” on this subpage because Formula/Capacity project reporting is no longer housed in REEport; all Formula/Capacity reporting is completed in the [NIFA Reporting System \(NRS\)](#). Your organization may still create and track State-funded projects in REEport, but those State-funded projects are not reviewed or tracked by NIFA personnel.

Please note that project initiation forms for Competitive Grant projects are created automatically by the system when the award is recommended or approved by NIFA grant management personnel. The only type of project that may be created by a user in REEport are State-funded projects.

Message Board

On the Message Board subpage, the Site Administrator controls the Optional Instructions or Notifications to Users. There are two separate message boards, one for the Project Initiation module and one for the Progress Report module. The messages you enter and save on this screen will be displayed in a highlighted yellow banner on each of these respective modules. To add or edit the messages, type the text in the respective text fields and click the “Save” button at the bottom of the subpage.

You may use these message boards to provide some quick helpful guidance you would like users to keep in mind as they complete their forms, or you may list your contact information for user questions.



SITE ADDRESS

On the Site Address page, the partner site address is listed and can be updated by SA on this page.

PREFIX

On the Prefix page, the organization's Project Number Prefix is listed and can be updated by SA on this page. This is the prefix that appears at the start of your partner site's Project Numbers. The prefix is controlled and set here by the Site Administrator and typically matches the Division Station code previously used with the CRIS webforms system; using a prefix indicative of your station (including a state abbreviation or state's first 3 letters, etc.) is helpful in determining which organization any project belongs to just from a quick glance at the Project Number.

The prefix set here is automatically prepended to project numbers when a new project is initiated.

SITE ADMINISTRATOR FAQs

On the Site Administrator FAQs, there are frequently asked questions and answers related to site administration.

LAUNCH WIZARD

This page is only used for initial site set up; this page should not be used after initial set up.

NON-FORMULA (NF) REASSIGNMENT

If your organization has more than one REEport management site in REEport, the project must be assigned to the appropriate management site in REEport before a Project Initiation form can be made available to the Project Director. In order to accomplish this, Site Administrators use the Non-Formula (NF) Reassignment option in REEport to re-assign the project(s) to the REEport site appropriate for the project. See the REEport site type examples below:

- State Ag. Experiment Station (SAES)
- Cooperative Extension (EXT)
- Vet Med (VET)
- Forestry School (FRST)
- 1890 (1890)
- Independent (No prefix)

NOTE: All listed examples above provide centralized administrative access for your institution and their respective REEport administrators, **except** for the Independent option, which makes the project available **only** to the PD and AOR listed on the award. Institution's REEport administrators will not have access to the award as soon as it is re-assigned to Independent site, and all reporting responsibility falls to the PD and AOR.

When a new project requires reassignment in REEport, all Site Administrators at the recipient institution will receive an email alert that contains NF Reassignment instructions (Email subject: *Alert: Your Action Required for New Project Initiation in REEport. NEW: Use Self-Reassignment Option Available To Site Administrators*).

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In that email alert, the SA(s) are instructed to:

1. Navigate to the NF Reassignment page under the Site Administration module in REEport.
2. Locate the project by the Proposal Number.
3. Click on the “Reassign” hyperlink to launch the Project Reassignment page.
4. Select a REEport site from the dropdown field at the bottom of the Project Reassignment page.
5. Review the REEport site information to confirm it is the correct management site for the selected project.
6. Click the Reassign button.

When a Site Administrator re-assigns a project, the PD, AOR, and applicable Site Administrator(s) (if project assigned to a partner site) will receive an “*NIFA Grant Proposal - Action Required in REEport*” email with instructions for completing the Project Initiation form. That email will show information about the REEport site the project has been moved from, assigned to, and assigned by.

NOTE: All of the Site Administrators at your organization have the ability to reassign any draft Non-Formula project(s) to your institution sites.

USER MANAGEMENT FOR PARTNER SITES

REEport Site Administrators are responsible for managing the REEport users for their assigned REEport partner site(s). REEport SA have access to activate users, assign user roles, edit user roles, and deactivate users in the Administration module of the NIFA Reporting Portal.

Please see the [Workflow section](#) of this document for guidance on how to update your REEport site workflows; the workflows control which user roles are allowed to submit report forms to NIFA.

PROJECT DIRECTOR AND AUTHORIZED ORGANIZATIONAL REPRESENTATIVE UPDATES

Site Administrators should **not** make changes to established Project Director (PD) or Authorized Organizational Representative (AOR) REEport user accounts in the Administration module.

Assigning the PD or AOR role to a new REEport user under the Administration module does **not** update the official assignments listed on a grant award. If a PD or AOR change is required on a competitive grant award, see the required documentation and submission instructions in the [NIFA Grants Management FAQs](#).

If a PD or AOR email address update is required on a competitive grant award, the grantee must contact the NIFA POCs listed in Block 14 on the Award Face Sheet or the REEport Help Desk at Electronic@usda.gov. Updating the email address on a PD or AOR REEport user account in the NIFA Reporting Portal will **not** update the PD or AOR email address associated with the grant award.



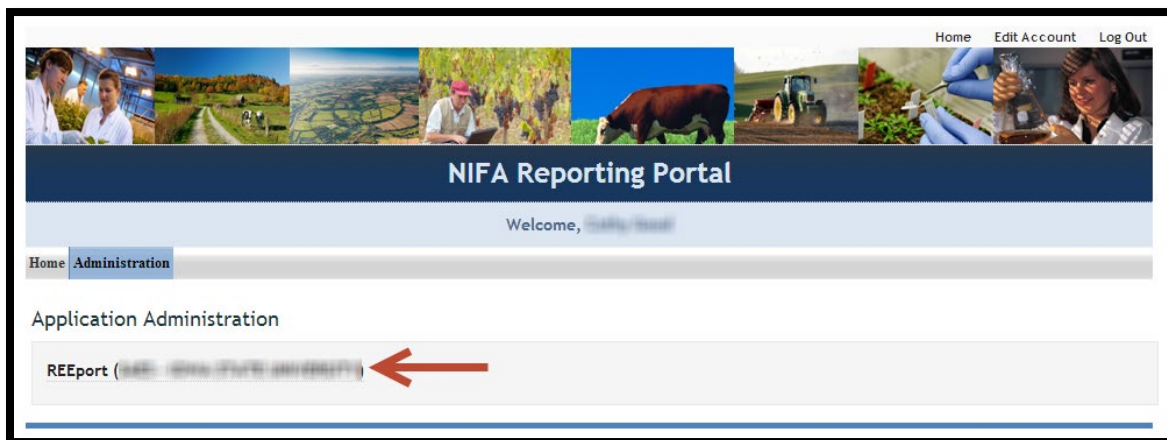
ACTIVATING A NEW USER AND ASSIGNING USER ROLES

To give additional users access to REEport, Site Administrators may activate new users and assign user roles in the NIFA Reporting Portal Administration module. Please review the [Partner Site Roles and Permissions in REEport section](#) and the [Project Director and Organizational Representative Updates section](#) before activating an account and assigning roles to a new user.

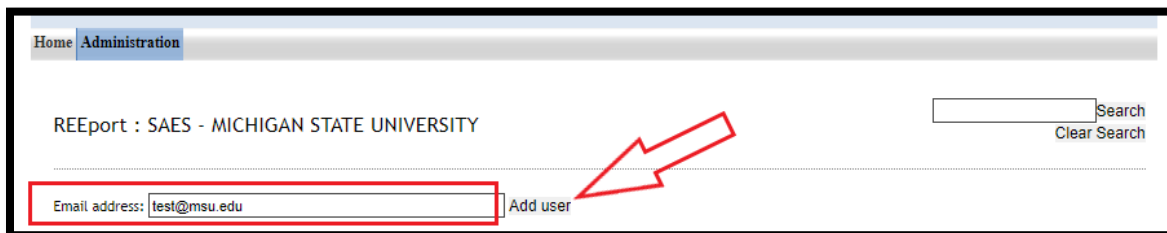
1. Navigate to the [NIFA Reporting Portal](#).
2. Enter your email address and password; hit “enter” or click the “Log In” button.
3. On the NIFA Reporting Portal landing page, click on the Administration module in the header bar.



4. Click on your assigned REEport site name. If you have more than one REEport site listed, select the applicable site for the new user.



5. Enter the email address of the new user in the Email address field and click the “Add User” button.



6. On the New User screen, the email address will pre-populate based on the entry in Step 5 and the State/Organization fields will pre-populate based on the REEport site selected in Step 4.

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7. On the New User screen, complete the additional required fields, including First Name, Last Name, and Phone Number.
8. At the bottom of the New User screen, select the user role(s) you wish to assign to the new user by checking the checkboxes next to the user role(s).
9. Click the “Create New” button to activate this new user account. Clicking the “Cancel” option will abandon the action and the new user data will not be saved.

The screenshot shows the 'New User' form in the REEPORT system. The form is titled 'Home Administration'. It contains the following fields and options:

- Name:** Salutation (dropdown), First name (text input), Middle name (text input), Last name (text input), and Suffix (dropdown). The 'First name' and 'Last name' fields are highlighted with red boxes.
- Title:** Title (text input).
- Contact:** Email address (text input, containing 'test@msu.edu') and Phone number (text input). The 'Phone number' field is highlighted with a red box.
- Organization:** State (dropdown, containing 'MICHIGAN') and Organization (dropdown, containing 'SAES - MICHIGAN STATE UNIVERSITY').
- User Roles:** A list of roles with checkboxes: Site Administrator, Assistant Site Administrator, Project Director, Reviewer, Admin Support, Financial Administrator, AOR, and Institutional Profile User. This list is highlighted with a red box.
- Buttons:** 'Create New' and 'or Cancel' buttons at the bottom right.

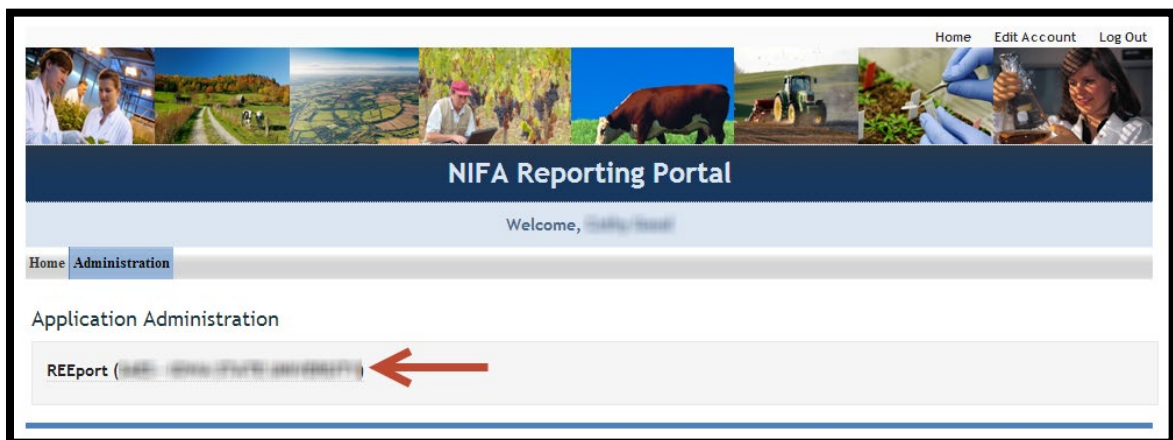
EDITING A USER AND UPDATING USER ROLES

To update a user account or update the assigned user roles, Site Administrators may edit an existing user in the NIFA Reporting Portal Administration module. Please review the [Partner Site Roles and Permissions in REEport section](#) of this document before assigning user roles.

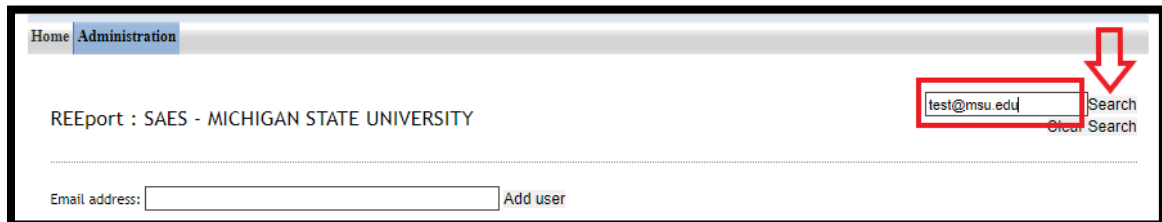
1. Navigate to the [NIFA Reporting Portal](#).
2. Enter your email address and password; hit "enter" or click the "Log In" button.
3. On the NIFA Reporting Portal landing page, click on the Administration module in the header bar.



4. Click on your assigned REEport site name. If you have more than one REEport site listed, select the REEport site that the user is currently assigned to.



5. Search for the existing user with the Search field at the top right corner of the screen. In the Search field, you may search by first name, last name, or email address. You may also scroll to the Active Users section to manually locate the existing user account.



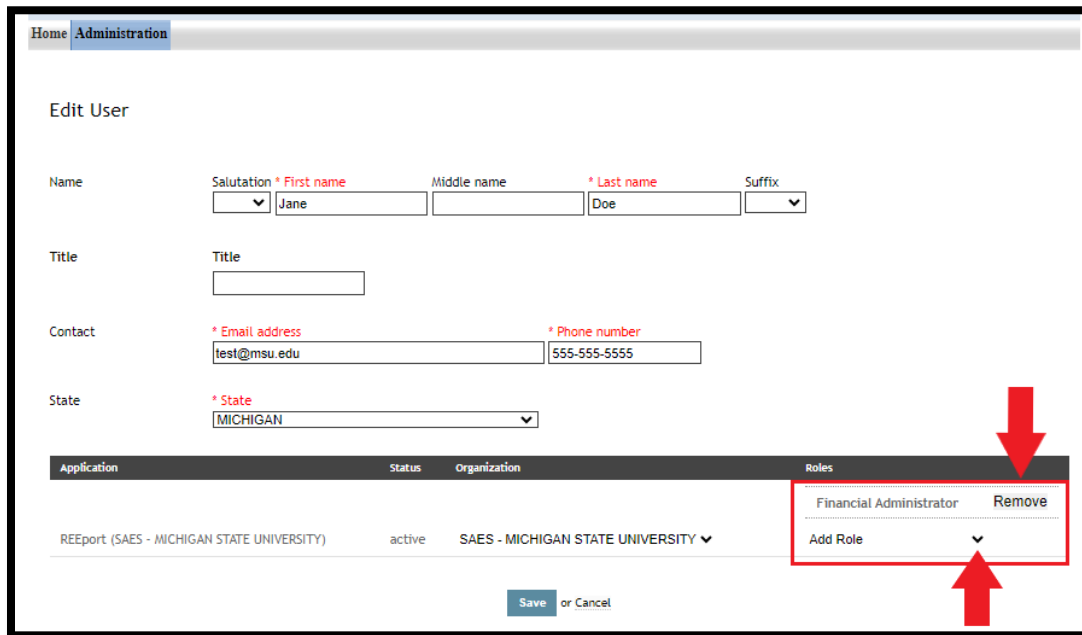
- After locating the existing user account, click on the user Name to open the Edit User screen.



Name	Email	Roles	Organization	State
Jane Doe	test@msu.edu	Financial Administrator	SAES - MICHIGAN STATE UNIVERSITY	MICHIGAN

- On the Edit User screen, you may edit the user information fields, click “Remove” to remove any user roles that are no longer needed, and add roles by selecting additional roles from the “Add Role” dropdown list.

NOTE: You should **not** make changes to established PD or AOR users in the Administration module. See the [Project Director and Administrative Organizational Representative Updates section](#) for more details.



Home Administration

Edit User

Name: Salutation Jane Middle name Last name Doe Suffix

Title:

Contact: * Email address test@msu.edu * Phone number 555-555-5555

State: * State MICHIGAN

Application	Status	Organization	Roles
REEport (SAES - MICHIGAN STATE UNIVERSITY)	active	SAES - MICHIGAN STATE UNIVERSITY	Financial Administrator Remove

Add Role

Save or Cancel



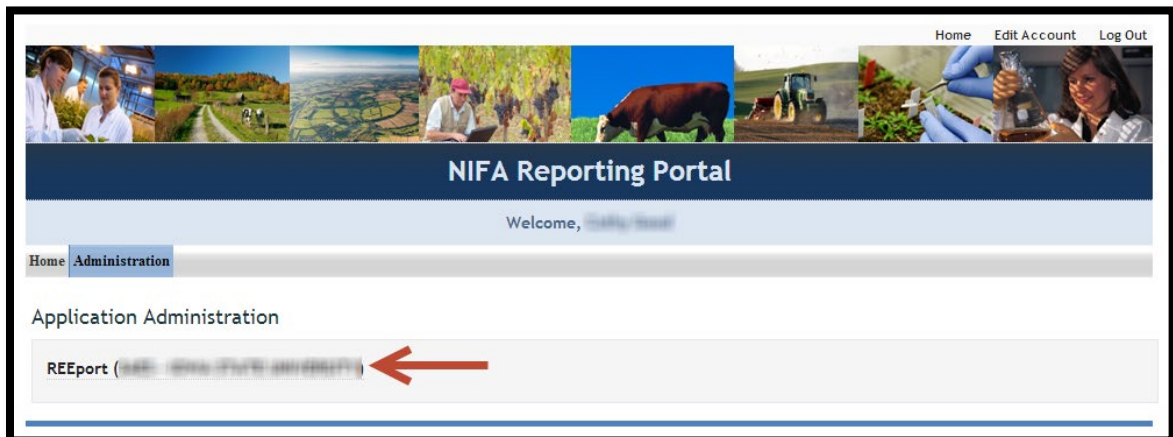
DEACTIVATING AN ACTIVE USER

To end REEport access, REEport Site Administrators should deactivate the user account in the NIFA Reporting Portal Administration module.

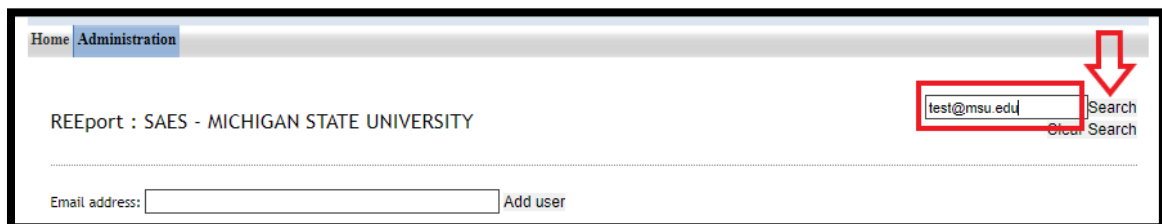
1. Navigate to the [NIFA Reporting Portal](#).
2. Enter your email address and password; hit “enter” or click the “Log In” button.
3. On the NIFA Reporting Portal landing page, click on the Administration module in the header bar.



4. Click on your assigned REEport site name. If you have more than one REEport site listed, select the REEport site that the user is currently assigned to.



5. Search for the existing user with the Search field at the top right corner of the screen. In the Search field, you may search by first name, last name, or email address. You may also scroll to the Active Users section to manually locate the existing user account.



6. Under the Active Users section, click the “Deactivate” button to the left of the user Name to deactivate the user account.

REEPORT OPERATIONAL REPORTS

The Operational Reports module is a search utility that allows Site Administrators and Assistant Site Administrators of Partner Sites to generate and export various status reports regarding all of the projects managed within their REEport site. This provides greater flexibility and insight to assist with the management of reporting requirements.

ACCESSING AND USING THE OPERATIONAL REPORTS MODULE

The Operational Reports module is located in the REEport application and it is only available for REEport Site Administrators and Assistant Site Administrators of Partner Sites. To access the module, these users must log in to REEport, click on **Reports** in the menu bar, and then click on **REEport Operational Reports**.

The search utility is user-friendly, and most functions are clearly labeled and self-explanatory. You should feel free to click on the various functions to get a feel for what they do. Remember that this module does nothing more than generate reports. You are not able to modify or edit any project data here.

Help Text

Hover your mouse over any of the green question-mark-ovals, and guidance will pop up about that section.

Search

The search box is where you can enter any specific word or number string.

Key points about using the search box:

- Searches entered here only search on the fields listed in the Results Table.
- You can search using the Boolean operators, AND, OR, NOT.
 - Operators must be capitalized.
 - Example: <corn AND water> will only return results that contain both search terms, corn and water.
 - Example: <corn OR water> will return results that contain either search term, corn or water.
 - Example: <corn NOT water> will return all results that contain “corn,” but exclude any that contain “water.”
- You can search using the wildcards (*) and (?).
 - Example: <Bio*> will return results with words that begin with “Bio,” such as Biology, Biophysics, etc.
 - Example: <*ment> will return results with words that end with “ment,” such as equipment, shipment, etc.
 - Example: <br??d> will return results with words such as breed, brood, bread, brand, etc.
- You can search using quotes.
 - Example: <“corn based polymers”> returns results only when all three of those words are found in that exact order.
- Without quotes, the AND operator is assumed by default.
 - Example: <corn based polymers>, with no quotes, is the same as searching <corn AND based AND polymers> and will return results when all three of those words are found in any order.
- NOTE: Do not include the brackets <> shown above in your search strings.

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Filters

Filters can be selected to narrow down results.

Key points about using filters:

- By default, no filters are enabled, and all possible results for your institution are listed in the results table.
- Filters can be toggled on and off by clicking on them.
 - When you select a filter, it is outlined and has a red “x” next to it.
 - When a filter is applied, only those filters which are part of the chosen subset will remain, while all other filters are removed from view, and the remaining filters display the number of results next to each filter.
- Filters can be cleared all at once by clicking the Reset button under the Search Box.

Saved Searches and Export

You are able to save and view any searches you create for later use. You may also export your search results to a CSV file.

Key points about saving and exporting searches:

- Click **Save New**, to save and name any search.
 - A search consists of any combination of filters you have selected, plus any search string entered.
- Click **Saved Searches** to view any previously saved search. When viewing saved searches, you can do the following:
 - Click **Load Search** to execute that search.
 - Click **Save Results** to execute a search and save the results with a date and time stamp.
 - Click **Results Panel** to pull up a listing of all saved results for that particular search.
 - Click **Delete Search** to delete a particular search.
- Click **Export** to export results to a CSV file.
 - Note: there are several additional data columns found in the exported file beyond what is listed in the onscreen results table. Be sure to review these fields to become familiar with the scope of reports available.

Results Table

The results table displays search results. All possible results for your organization are displayed by default.

Key points about using the results table:

- Keep in mind that the results are **records**, not projects, so you may see the same project listed multiple times. One record may be the Project Initiation, while the others can be Progress/Final Reports.
- Keep in mind that Project Status is a filter option. Unless the appropriate filter is selected, you will see records of **ALL** status types. You may want to distinguish between “Draft” and “Submitted to NIFA” for example.
- The onscreen table can be sorted by clicking on any column heading.
- If there are many records in a search, the results will be paginated and you can click through the pages at the bottom left of the screen.
 - Alternatively, you can export the results to a CSV file.
- There is a PDF link to the far right of each record, which you can click to pull up a PDF copy of the full document.