REEport Troubleshooting Guide

What are you having trouble with?

- Portal Login and REEport Access **– Click Here**
- Project Initiation **– Click Here**
- Progress/Final Report **– Click Here**

Portal Login and REEport Access -

<<< Click on the scenario below that best describes your situation >>>

1. I don't know where to login.
2. I need a REEport account set up for me. – Or - My email address is not recognized by the system.
3. I don't know my User ID or Password.
4. I have reset my password, but do not receive the Activation Link in my email.
5. The Project Director has changed on the project. How do they login?
6. I am able to login, but only have access to the Leadership Management Dashboard.

Project Initiation -

*<<< **Click on the scenario below that best describes your situation** >>>*

Non-Formula/Non-Capacity ONLY.

1. I have logged into the Portal, but just don't know what to do next?
2. I have received automated email notification that a Project Initiation form has been created, but I cannot find the project in REEport.
3. I/My organization have "claimed" my project, (see guidance in point 2 above) in order to have it made available for editing, but I still cannot find it in REEport.
4. I have resolved all issues associated with points 1, 2 & 3 above (or they are not applicable), but still cannot find my project in the Project Initiation section of REEport.
5. I have located my project in the Draft folder of the Project Initiation section, but am unable to open it for editing.
6. I am in the process of completing the Project Initiation form, but am unable to edit certain fields.
7. I have questions about content for certain fields.
8. I receive an error when attempting to submit the Project Initiation form.
9. I have completed and submitted the Project Initiation form, but NIFA Program Staff have indicated that it is not found in the system.

Progress/Final Report -

<<< *Click on the scenario below that best describes your situation* >>>

1. I have logged into the Portal, but just don't know what to do next?
2. After following instructions in Point 1 above, I still cannot locate my Progress or Final Report form for editing.
3. I have located my project in the Draft folder of the Progress or Final Report section, but am unable to open it for editing.
4. I am in the process of completing the Progress or Final Report form, but am unable to edit certain fields.
5. Where do I upload my already prepared report?
6. I have questions about content for certain fields.
7. I receive an error when attempting to submit the Progress or Final Report form.
8. I have completed and submitted the Progress or Final Report form, but NIFA Program Staff have indicated that it is not found in the system.
9. I have received email notification as reminder that a Progress or a Final report is due within a certain number of days. I have questions about the actual due date.
10. I have received multiple email notification reminders; one stating a Progress report is due, and another for the Final Report. What do I do?

Portal Login and REEport Access Guidance

1. **I don't know where to login.** - Back to Top
   a. http://portal.nifa.usda.gov
2. **I need a REEport account set up for me/My email address is not recognized by the system.** - Back to Top
   a. Be aware that only the listed PD (Project Director) and AOR (Authorized Organizational Representative) on a grant or project will be provided access to REEport. If you are not listed on a grant or project in the system, then you will not have access. If there is a change in PD, then contact NIFA Program Staff as listed on the grant's Award Face Sheet to request a PD change. This will automatically create a REEport user account for the new PD. **DO NOT REGISTER FOR THE LEADERSHIP MANAGEMENT DASHBOARD!** This will not give you access to REEport, and will only complicate providing you access later if it is determined that you should be listed on the grant.
      i. The only exception to the PD/AOR rule above is if you are part of the administrative staff at an LGU (Land Grant University) not to include Tribal Colleges. In which case you should contact your organization's REEport Site Admin to have an account created for you.
   b. Double-check to make sure you are entering your address correctly.
   c. If your email address has changed at any point, and you know you are the listed PD or AOR on a grant, then the project you are looking for is probably associated with an old email address.
      i. You can reset the password using the old account. Click here for password reset instructions.
      ii. If that email account is no longer active and receiving email, then contact REEport support staff at reeport@nifa.usda.gov.
3. **I don't know my User ID or Password.** - Back to Top
   a. Your User ID is your email address as listed on the grant or project you are attempting to access.
   b. You control and set your own password. Click here for password reset instructions.
4. **I have reset my password, but do not receive the Activation Link in my email.** - Back to Top
   a. Be assured that the Activation Links are being sent. If you do not receive it, you can try again; there is no limit. If you still do not receive, then it must be getting blocked by spam filtering at some level, and you may need to coordinate with your IT Dept. to have noreply@nifa.usda.gov white listed.
5. **The Project Director has changed on the project, how do they login?** - Back to Top

a. If the project in question is a grant for which an application was submitted through Grants.gov, (Non-Formula/Non-Capacity) then you will need to contact NIFA Program Staff as listed on the Award Face Sheet, and make sure that they implement the PD change in NIFA's grants database. Once completed, this will update the REEport record and then the new PD will be able to reset their password (click here for reset instructions) and login to REEport.

b. For any other project, (Formula/Capacity and State), which pertain only to Land Grant Universities, then the REEport Site Admin for that LGU should use the Project Change module to change the PD.

6. **I am able to login, but only have access to the Leadership Management Dashboard. -** Back to Top

    d. See Points 2a and 2c above.

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Project Initiation Guidance

Non-Formula/Non-Capacity ONLY.

1. **I have logged into the Portal, but just don't know what to do next? -**
   a. After initial login to the Portal, Click on REEport, listed under the Active Applications heading.
   b. Click on Project Initiation.
   c. Locate the "Projects in Draft Stage" folder and click on it.
      i. This displays a listing of the Project Initiation forms awaiting completion inside that folder.
      ii. NOTE: If there are many projects listed, such that it is difficult to locate one, then use the search utility.

Track Project Initiations

Accession Number		Project Number		Proposal Number	
Performing Department			▾ ✕	Project Director	

Search **Clear Search**

      iii. NOTE: The search utility is a filter, and incorrect search parameters could filter out your desired project. Make sure there are no leading or trailing spaces in your search string. Also, search using only one field at a time.
   d. Locate the desired project listed in the "Projects in Draft Stage" folder.
   e. Click on the underlined title of the desired project; this will open the form for editing.
      i. NOTE: Click on the title within the listed project itself, NOT on the column heading "Title". Clicking the column heading is a sort function, and will sort listed projects alphabetically by title.
   f. If you have further questions at this point, please review the other troubleshooting scenarios found in this guide.
2. **I have received automated email notification that a Project Initiation form has been created, but I cannot find the project in REEport. -**
   a. The Project Initiation form has been created, however before it can be made available for completion it must be assigned to the correct organization. Typically REEport will automatically make this assignment based on your

organization's DUNS number, but in some situations multiple organizations share a DUNS number, and so REEport does not know where to assign the project.

b. In the event of the above, another email entitled, "Alert More Information Required for New Project Initiation in REEport" is sent to you at the same time as the first, requesting that you "claim" the project so that we can have it manually assigned to your organization. Please check to see if you have received such an email, carefully read the instructions within, and respond accordingly. See example email below:

From: REEport@nifa.usda.gov [mailto:REEport@nifa.usda.gov]
Sent: Wednesday, July 17, 2013 4:25 AM
To: ████████
████████
Cc: REEportNotifications@nifa.usda.gov; REEportNotifications@nifa.usda.gov
Subject: Alert: More Information Required for New Project Initiation in REEport

This email is to alert you that more information is required for a new Project Initiation in REEport.

Grant Proposal Number: 2013-████

Title: ████████
████

Project Director: ████

NIFA is unable to make the Project Initiation form for this grant available for completion in the REEport system. In order to make the form available for editing, we need to know which specific organization at your university system it belongs.

For example, your university may have:
• State Ag. Experiment Station
• Cooperative Extension
• Vet Med
• The University itself (example: The University of Illinois)

If this project belongs to your organization, please email the NIFA REEport Staff at REEport@nifa.usda.gov to claim it. In your email, make sure to indicate the specific organization to which it belongs (refer to above examples). Please allow approximately 5 business days for processing once we've received your claim email.

3. **I/My organization have "claimed" my project, (see guidance in point 2 above) in order to have it made available for editing, but I still cannot find it in REEport. -** Back to Top

   a. It typically takes up to 5 business days (sometimes longer), <u>from the time we respond to your claim</u>, before we are able to make the form available to you.

   b. If after waiting this amount of time you find the project is still not available in REEport, please contact reeport@nifa.usda.gov, and make reference to your Proposal Number.

4. **I have resolved all issues associated with points 1, 2 & 3 above (or they are not applicable), but still cannot find my project in the Project Initiation section of REEport.**
   - Back to Top

   a. Be aware that only the listed PD (Project Director) and AOR (Authorized Organizational Representative) on a grant will be provided access in REEport to that specific grant. It is possible that you could be listed on other grants, and

therefore have access to REEport, but if you are not listed on a particular grant, then you will not have access to it. If you believe that you should be listed on the grant as either the PD or AOR, then you will need to contact NIFA Program Staff as listed on the Award Face Sheet, and request a PD or AOR change.

    i. The only exception to the PD/AOR rule above is if you are part of the administrative staff at an LGU (Land Grant University) not to include Tribal Colleges. In which case you should contact your organization's REEport Site Admin to make sure you have been assigned appropriate permissions, which would give you access if applicable.

b. You might have multiple accounts in our system. If your email address has changed at any point, and you know you are the listed PD or AOR on a grant, then the project you are looking for is probably associated with an old email address, which REEport considers a separate and distinct user login ID.

    i. You can reset the password and log in using the old account. Click here for password reset instructions.

    ii. If that account is no longer active and receiving email, then contact REEport support staff at reeport@nifa.usda.gov.

c. If you have not received automated email notification letting you know that the Project Initiation form is available (See Point 2 above), then it is possible that NIFA Program Staff have not completed processing the initial recommendation of the award. They must complete this step before the Project Initiation form will be created in the system.

    i. Contact NIFA Program Staff managing your award to ensure they have completed the Recommendation of the award in their system.

    ii. NOTE TO LGU'S: DO NOT ATTEMPT TO CREATE THE PROJECT INITIATION FORM! That feature is for FORMULA projects only.

d. If after reviewing points 4a, 4b, and 4c above, you find you still cannot locate your project, please try the following:

    i. Make sure you are using a supported and updated browser: Internet Explorer or Firefox. Chrome works also. DO NOT USE SAFARI.

    ii. Clear your browser's cache. For instructions, click this link: http://kb.iu.edu/data/ahic.html

    iii. Try a different browser. For example, if you are using IE, install and test with Firefox or Chrome.

        1. http://www.mozilla.org

        2. www.google.com/chrome

    iv. Test on a different computer entirely.

    v. If none of the above resolve the issue, please contact REEport support at reeport@nifa.usda.gov

5. **I have located my project in the Draft folder of the Project Initiation section, but am unable to open it for editing. -** Back to Top

a. Be sure that you click on an underlined link in the listed project. For example, click on the actual title of the project. This will open the form for editing.

   i. NOTE: Clicking on the word, "Title" in the column heading will not open the form. This is a sort function.

   ii. CLICKING ON THE PDF VIEW WILL NOT ALLOW YOU TO EDIT THE FORM. You typically use the PDF view after completing the form to review your work, and save a copy for your records.

b. Be aware that only the listed PD (Project Director) will have edit capability on a project. The listed AOR (Authorized Organizational Representative) on a grant has READ-ONLY access.

   i. When you attempt to click on the title of the project, you find it is not underlined and not clickable. This means you are the AOR and have read-only access. The PD will need to login to complete the form.

   ii. There is one exception to the above. In some cases a user is listed as both the PD and the AOR, and this creates a role conflict, overriding the PD edit capability.

      1. Check your roles:
         a. Perform a fresh login to the Portal.
         b. Click, "Edit Account" found in the upper right of the screen.
         c. Scroll to the bottom of the page and view the roles listed to the right of your REEport account.

      2. If you see both "Project Director" and "Reviewer" roles listed, then you have a conflict. Please contact REEport support at reeport@nifa.usda.gov.

6. **I am in the process of completing the Project Initiation form, but am unable to edit certain fields.** - Back to Top

   a. Many fields, particularly on the Cover Page, are pre-populated for you with data from the initial Grants.gov application, and you will not be able to edit these fields. You should continue to complete and submit the form.

      i. For any of these fields, if you find that the data entered is incorrect, you will need to contact NIFA Program Staff that are managing your award to have the information corrected in our internal grants database, which will then update the REEport record. Some of these fields may have technical issues associated with them, and may not update right away. In most cases you should still continue to complete and submit the form, and the correct information will populate to the record retroactively.

   b. Some non-editable fields may be blank, like the Award Number, for example. These fields will be completed automatically by the system later as the award continues to be processed in our system. You should continue to complete and submit the form.

7. **I have questions about content for certain fields. -**
    a. Next to every field in the form, you will find a small blue box with a question mark. Clicking one of these boxes will provide guidance on how to complete that particular field. If after carefully reading the guidance provided there you find that you still have content related questions, you should contact NIFA Program Staff that are managing your award. For any technical questions, please review the other scenarios found in this document.
8. **I receive an error when attempting to submit the Project Initiation form. -**
    a. In most cases, you should be able to review the error message provided, typically pertaining to a particular field, and then make corrections as instructed.
    b. If you find you are unable to correct the error, then please contact REEport support at reeport@nifa.usda.gov.
9. **I have completed and submitted the Project Initiation form, but NIFA Program Staff have indicated that it is not found in the system. -**
    a. If you are at an LGU (Land Grant University), after submitting your form it must subsequently be submitted by your REEport Site Admin after undergoing an internal review process. You can see if this is true in your case by checking to see if your Project Initiation form is still in the "Pending Submission to NIFA" folder.
    b. There is a yellow message board towards the top of the Project Initiation section, where your REEport Site Admin should have posted their contact information.
    c. If you are not at an LGU, then the above does not apply to you. Please double check to ensure that you have submitted your form, and that it has moved from the "Draft" folder to the "Active Projects" folder. If you still have trouble with this issue, please contact REEport Support at reeport@nifa.usda.gov.

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Progress/Final Report Guidance

1. **I have logged into the Portal, but just don't know what to do next? -** [Back to Top](#)
   a. After initial login to the Portal, Click on <u>REEport</u>, listed under the <u>Active Applications</u> heading.
   b. Click on <u>Progress Report</u> or <u>Final Report</u>, depending on which report you want to complete.
   c. Locate the "Progress/Final Reports in Draft" folder and click on it.
      i. This displays a listing of the reports awaiting completion inside that folder.
      ii. NOTE: For all Progress Reports, REEport automatically creates the form to cover the first reporting period for the project, and the dates cannot be changed. After submission of the first Progress Report covering the first reporting period, <u>the system will automatically generate a new draft form for the next reporting period</u>.
      iii. NOTE: If there are many projects listed, such that it is difficult to locate one, then use the search utility.

Track Project Initiations

Accession Number		Project Number		Proposal Number	
Performing Department			▼ ✕	Project Director	
Search Clear Search					

      iv. NOTE: The search utility is a filter, and incorrect search parameters could filter out your desired project. Make sure there are no leading or trailing spaces in your search string. Also, search using only one field at a time.
   d. Locate the desired project listed in the Draft folder.
   e. Click on the <u>underlined title</u> of the desired project. This will open the form for editing.
      i. NOTE: Click on the title within the listed project itself, NOT on the column heading "Title". Clicking the column heading is a sort function, and will sort listed projects alphabetically by title.
   f. If you have further questions at this point, please review the other troubleshooting scenarios found in this guide.
2. **After following instructions in Point 1 above, I still cannot locate my Progress or Final Report form for editing. -** [Back to Top](#)

a. Be aware that only the listed PD (Project Director) and AOR (Authorized Organizational Representative) on a grant will be provided access in REEport to that specific grant. It is possible that you could be listed on other grants, and therefore have access to REEport, but if you are not listed on a particular grant, then you will not have access to it. If you believe you should be listed on the grant as the PD or AOR, then you will need to contact NIFA Program Staff as listed on the Award Face Sheet, and request a PD or AOR change.
   i. The only exception to the PD/AOR rule above is if you are part of the administrative staff at an LGU (Land Grant University) not to include Tribal Colleges. In which case you should contact your organization's REEport Site Admin to make sure you have been assigned appropriate permissions, which would give you access if applicable.
b. You might have multiple accounts in our system. If your email address has changed at any point, and you know you are the listed PD or AOR on a grant, then the project you are looking for is probably associated with an old email address, which REEport considers a separate and distinct user login ID.
   i. You can reset the password and log in using the old account. Click here for password reset instructions.
   ii. If that account is no longer active and receiving email, then contact REEport support staff at reeport@nifa.usda.gov.
c. If after reviewing points 2a and 2b above, you find you still cannot locate your project, please try the following:
   i. Make sure you are using a supported and updated browser: Internet Explorer or Firefox. Chrome works also. DO NOT USE SAFARI.
   ii. Clear your browser's cache. For instructions, click this link: http://kb.iu.edu/data/ahic.html
   iii. Try a different browser. For example, if you are using IE, install and test with Firefox or Chrome.
      1. http://www.mozilla.org
      2. www.google.com/chrome
   iv. Test on a different computer entirely.
   v. If none of the above resolve the issue, please contact REEport support at reeport@nifa.usda.gov

3. **I have located my project in the Draft folder of the Progress or Final Report section, but am unable to open it for editing. -** Back to Top
   a. Be sure that you click on an underlined link in the listed project. For example, click on the actual title of the project. This will open the form for editing.
      i. NOTE: Clicking on the word, "Title" in the column heading will not open the form. This is a sort function.
      ii. CLICKING ON THE PDF VIEW WILL NOT ALLOW YOU TO EDIT THE FORM. You typically use the PDF view after completing the form to review your work, and save a copy for your records.

    b. Be aware that only the listed PD (Project Director) will have edit capability on a project. The listed AOR (Authorized Organizational Representative) on a grant has READ-ONLY access.

        i. When you attempt to click on the title of the project, you find it is not underlined and not clickable. This means you are the AOR and have read-only access. The PD will need to login to complete the form.

        ii. There is one exception to the above. In some cases a user is listed as both the PD and the AOR, and this creates a role conflict, overriding the PD edit capability.

            1. Check your roles:

                a. Perform a fresh login to the Portal.

                b. Click, "Edit Account" found in the upper right of the screen.

                c. Scroll to the bottom of the page and view the roles listed to the right of your REEport account.

            2. If you see both "Project Director" and "Reviewer" roles listed, then you have a conflict. Please contact REEport support at reeport@nifa.usda.gov.

4. **I am in the process of completing the Progress or Final Report form, but am unable to edit certain fields. -** [Back to Top](#)

    a. Many fields, particularly on the Cover Page, are pre-populated for you with data from the initial Grants.gov application, and you will not be able to edit these fields. You should continue to complete and submit the form.

        i. For any of these fields, if you find that the data entered is incorrect, you will need to contact NIFA Program Staff that are managing your award to have the information corrected in our internal grants database, which will then update the REEport record. Some of these fields may have technical issues associated with them, and may not update right away. In most cases you should still continue to complete and submit the form, and the correct information will populate to the record retroactively.

5. **Where do I upload my already prepared report? -** [Back to Top](#)

    a. Completing the Progress/Final Report is an online form, and there is no place for you to upload a prepared report. You can copy and paste from your report into the form in REEport.

    b. Additionally, REEport does not support insertion of any charts, tables, or diagrams.

6. **I have questions about content for certain fields. -** [Back to Top](#)

    a. Next to every field in the form, you will find a small blue box with a question mark. Clicking one of these boxes will provide guidance on how to complete that particular field. If after carefully reading the guidance provided there you find that you still have content related questions, you should contact NIFA

Program Staff that are managing your award. For any technical questions, please review the other scenarios found in this document.

7. **I receive an error when attempting to submit the Progress or Final Report form. -** [Back to Top](#)
    a. In most cases, you should be able to review the error message provided, typically pertaining to a particular field, and then make corrections as instructed.
    b. If you find you are unable to correct the error, then please contact REEport support at reeport@nifa.usda.gov.

8. **I have completed and submitted the Progress or Final Report form, but NIFA Program Staff have indicated that it is not found in the system. -** [Back to Top](#)
    a. If you are at an LGU (Land Grant University), after submitting your form it must subsequently be submitted by your REEport Site Admin after undergoing an internal review process. You can see if this is true in your case by checking to see if your Project Initiation form is still in the "Pending Submission to NIFA" folder.
    b. There is a yellow message board towards the top of the Progress and Final Report sections where your REEport Site Admin should have posted their contact information.
    c. If you are not at an LGU, then the above does not apply to you. Please double check to ensure that you have submitted your form, and that it has moved from the "Draft" folder to the "Submitted to NIFA" folder. If you still have trouble with this issue, please contact REEport Support at reeport@nifa.usda.gov.

9. **I have received email notification as reminder that a Progress or a Final report is due within a certain number of days. I have questions about the actual due date. -** [Back to Top](#)
    a. **Non-Formula/Non Capacity**
        i. For Progress Reports, REEport automatically sends reminder notifications 90, 60, and 30 days prior to the Anniversary Date of the project. The Progress Report is due no later than 90 days **AFTER** the Anniversary Date.
        ii. For Final Reports, REEport automatically sends reminder notifications 90, 60, and 30 days prior to the End Date of the project. The Final Report is due no later than 90 days **AFTER** the End Date.
    b. **Formula/Capacity**
        i. These projects apply to LGU's only (Land Grant Universities), and are due March 1st each year. Please coordinate with you REEport Site Admin for completion and submission of any Progress/Final Reports.

10. **I have received multiple email notification reminders; one stating a Progress report is due, and another for the Final Report. What do I do? -** [Back to Top](#)
    a. In the final year of a grant, REEport does not know whether the project will be continued or not, and so provides both Progress and Final Report forms. If the

grant will continue past the listed End Date for any reason, then you should complete the Progress Report. If the grant is coming to a conclusion, then complete the Final Report. Keep in mind that the email notifications for reporting forms are sent out automatically by the system. In the final year of a grant therefore, the system will send out reporting reminder emails on both the Progress and Final report forms. These are reminders, and it does not mean that you are required to complete both. In the final year of a grant, you need to make the determination which report is appropriate.

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Password Rest Instructions -

Go to: http://portal.nifa.usda.gov

Click **Reset Password**

1. Enter your email address and click **Send**.
   i. If your address is not recognized by the system:
      1. Verify you are entering the address correctly.
      2. You may have more than one email address listed in our system. Be sure you are using the correct one listed on the project.
      3. If the above does not resolve, contact reeport@nifa.usda.gov

2. Confirm that you see the, "**Rest Password – Sent**" message.

3. An Activation Link will be sent to your email account.
   i. Once received, click on the link.
   ii. If you don't receive the link, please check your Junk folders and also any spam filtering that your IT Department manages which might be blocking the email.
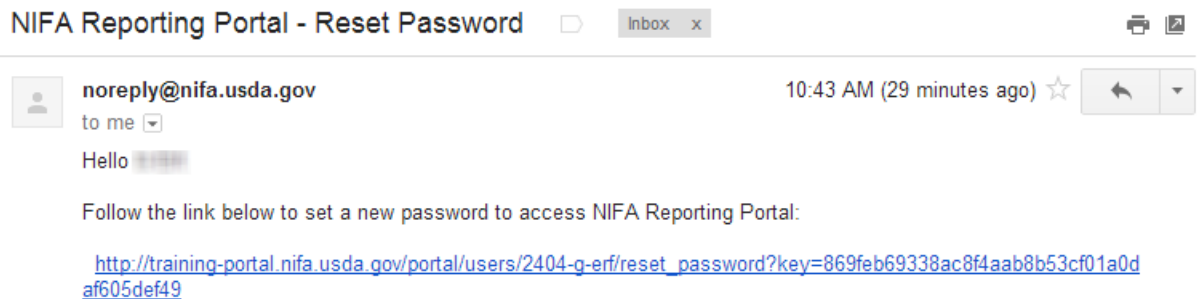
4. Now you are able to choose a password.
a. Enter and confirm your password.
b. Click **Submit**.

5. You should see the below message.

6. Click the **Log In** link, which will take you back to the Portal where you can now login using your email address and the password you just chose.

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