

REReport Operational Reports User Guide



Understanding How to Use and Generate
Operational Reports

National Institute of
Food and Agriculture

USDA

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Getting Started

What is the Operational Reports module?

The Operational Reports module is a search utility that allows Site Administrators and Assistant Site Administrators at Land Grant Universities 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.

Gaining Access

The Operational Reports module is located in the REEport system, and is available only to REEport Site Administrators and Assistant Site Administrators at Land Grant Universities, not to include 1994 Tribal Colleges. Site Administrators manage REEport user accounts and roles, and as such, assign the Assistant Site Administrator role. If you require access to the Operational Reports module, please contact your institution's REEport Site Administrator. For information on logging into REEport, and all other questions on using the system, please go to: <http://nifa.usda.gov/tool/reeport>

Site Administrator Configuration

In order for other users to have access to the Operational Reports module in REEport, Site Administrators will need to assign the Assistant Site Administrator role. **Site Administrators:** please follow the guidance below to accomplish this.

Assign Assistant Site Administrator Role

-Log in to the Portal and click “Administration”



Edit Account Log Out

NIFA Reporting Portal

Welcome

Home Administration

All Applications Are Available - REEport, LMD, and POW
After experiencing database failures, all systems are back online. Any data entered into or actions taken in REEport up until 11:00 am (Eastern) on Monday, October 27th have been restored and should be reflected in the system. Please contact electronic@nifa.usda.gov if you experience any connectivity issues.

Active Applications

- Leadership Management Dashboard - LMD
- Plan of Work
- REEport ([Institution Name])

-Click your institution



Home Edit Account Log Out

NIFA Reporting Portal

Welcome, [Institution Name]

Home Administration

Application Administration

- REEport ([Institution Name])

-Click on the user name

Home Edit Account Log Out

NIFA Reporting Portal

Welcome, [User Name]

Home Administration

REEport : [Search] Search
Clear Search

Email address: [Input] Add user

Active Users

Name	Email	Roles	Organization	State
[User Name]	[User Email]	Admin Support	[Organization]	[State]

-Select the Assistant Site Administrator role from the dropdown. Click “Save”.

Edit User

Name: Salutation * First name Middle name * Last name Suffix

Title: [Input]

Contact: * Email address * Phone number

State: * State

Application	Status	Organization	Roles
REEport ([Organization])	active	[Organization]	Admin Support Remove
REEport ([Organization])	active	[Organization]	from ETL
Leadership Management Dashboard - LMD	active	[Organization]	Add Role Add Role Site Administrator Assistant Site Administrator Project Director Reviewer Admin Support Financial Administrator

[Save] or Cancel

Opening the Operational Reports Module

After being granted access, log in to REEport, click on **Reports** in the menu bar, then click on **REEport Operational Reports**, in order to access the module.



The screenshot shows the REEport website interface. At the top, there is a banner with the text "REEport" and "NIFA - NATIONAL INSTITUTE OF FOOD AND AGRICULTURE". Below the banner is a navigation menu with the following items: Home, Project Initiation, Progress Report, Financial Report, Reports, Final Report, Organization Data, Help Text, Management, and Staged Data. The "Reports" item is highlighted with a blue background. Below the navigation menu, there is a section titled "Mail Templates" with a red arrow pointing down to the "REEport Operational Reports" link. Another red arrow points up from the "Reports" link in the navigation menu to the "REEport Operational Reports" link. Below the "REEport Operational Reports" link, there is a section titled "More..." and a section titled "Search Publications".

REEport Operational Reports
Click this link to generate and export Operational Reports. Operational Reports provide Site Administrators and Assistant Site Administrators a tool for managing their institution's data, reports, and workload.

More...

Search Publications
Click this link to search and export publication data for active projects.

Utilizing the Operational Reports Module

Quick Introduction

Using the module is fairly straightforward and 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, and so you aren't going to break anything.

Help Text

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

The screenshot shows the REEport Operational Reports interface. A red arrow points to a green question-mark-oval icon next to the 'Filters' button. A tooltip is displayed over this icon, providing instructions: 'The Filter list below shows the available facets to filter on. Click individual filters to toggle them on and off. Click the Reset button to clear all filters and searches. Use Hide Filters to see your results in full screen. Use Filter Chooser to select the most useful filters to you. Use the More link at the bottom of filter headings to expand and show additional filter values.'

The interface also shows a table with 1,918 results found. The table has the following columns: Organization Name, Department, Project Director, Funding Source, Project Start Date, Project End Date, and Last Progress Report FY. Two rows of data are visible:

Organization Name	Department	Project Director	Funding Source	Project Start Date	Project End Date	Last Progress Report FY
SAES - IOWA STATE UNIVERSITY	College of Veterinary Medicine	Griffith, Ronald	HATCH/MULTI-STATE	2015-02-19	2015-09-30	N/A
SAES - IOWA STATE UNIVERSITY	College of Veterinary Medicine	Griffith, Ronald	HATCH/MULTI-STATE	2015-02-19	2015-09-30	N/A

Search

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



Key points about using search:

- 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**.
- Do not include the brackets <> shown above in your search strings.

Filters

Filters can be selected to narrow down results.

1,918 Results Found

Accession Number	Project Number	Proposal Number	Award Number	Title	Organization Name	Department	Project Director	Funding Source	Project Start Date	Project End Date	Last Progress Report FY
1005990	IOW05427	N/A	N/A	A National Agricultural Program for Minor Use Animal Drugs	SAES - IOWA STATE UNIVERSITY	College of Veterinary Medicine	Griffith, Ronald	HATCH/MULTI-STATE	2015-02-19	2015-09-30	N/A
1005990	IOW05427	N/A	N/A	A National Agricultural Program for Minor Use Animal Drugs	SAES - IOWA STATE UNIVERSITY	College of Veterinary Medicine	Griffith, Ronald	HATCH/MULTI-STATE	2015-02-19	2015-09-30	N/A
1005990	IOW05427	N/A	N/A	A National Agricultural Program for Minor Use Animal Drugs	SAES - IOWA STATE UNIVERSITY	College of Veterinary Medicine	Griffith, Ronald	HATCH/MULTI-STATE	2015-02-19	2015-09-30	N/A
1005989	IOW05426	N/A	N/A	Multistate Agricultural Literacy Research	SAES - IOWA STATE UNIVERSITY	Agricultural Education and Studies	Martin, Robert	HATCH/MULTI-STATE	2015-03-11	2019-09-30	N/A
1005989	IOW05426	N/A	N/A	Multistate Agricultural Literacy	SAES - IOWA STATE UNIVERSITY	Agricultural Education and Studies	Martin, Robert	HATCH/MULTI-STATE	2015-03-11	2019-09-30	N/A

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.
 - Example: to filter the results to show all Hatch projects with Final Reports due in the next 30 days, you would click “Hatch” under **Funding Source**, “Final Report” under **Document Type**, and “Report Due in Next 30 days” under **Report Due**.
 - Note that as you select a filter, it is outlined and has a red “x” next to it.
 - Also note that as 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 that 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. Also you can export any search results to Excel.



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 an Excel .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.

← Hide Filters | Filter Chooser

Filters 0

Document Type 0

- Project (331)
- Progress Reports (1,260)
- Final Report (327)

Funding Source 0

- ANIMAL HEALTH (14)
- HATCH (564)
- HATCH/MULTI-STATE (701)
- MCINTIRE-STENNIS (57)
- NON FORMULA (541)
- STATE (41)

Funding Source Type 0

- FORMULA (1,336)
- NON FORMULA (541)
- STATE (41)

Department 0

- Ag & Bio Engineering (6)
- Ag & Biosystems Engineering (22)
- Ag. and Biosystems Engineering (3)
- Agric & Biosystems Engineering (9)
- Agricultural Education and Studies (16)
- Agricultural and Biosystems Engineering (1)

1,918 Results Found

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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 the Status filters. 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 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 an Excel 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.