

REEport State Administrative Interface Web Conference (October 8, 2009)

Presenter: Teresa Bailey

Moderator: Bart Hewitt

1. What does REEport stand for?

REEport is not an acronym. It was named to encompass Research, Education, and Extension Reporting.

2. Will this system replace CRIS? Could you please clarify a little further... Is this totally replacing the CRIS system or we can use either one to generate and submit CRIS forms? Will this replace the CRIS entry or reporting to the 416/417, 419 and 421 forms at some time?

This system will replace the CRIS web-forms application, which collects the AD-4xx series. CRIS is a database application which will still be the foundation database. In the future, data from REEport will be stored in the CRIS database in the same manner as data entered using CRIS web-forms is now.

3. When will the Reepor system be launched? When will the system go live? When do you anticipate this going "live", and the current CRIS Webforms site taken offline – the effective date of implementation? When do we start using this system for new projects?

REEport will be launched when the new software has been fully tested and all critical issues found during testing have been addressed. We intend to provide ample time for testing and a training period using the REEport sandbox. We are reviewing considerations for what time of year is best for our partners to transition to the new system, and we understand there are peak times. Ample notice will be given before the switch over.

4. When will we use this system to prepare AD421s?

The current schedule puts the REEport Project Progress report, replacing the AD-421, in the test/training sandbox in the summer of 2010. An implementation schedule will be determined based upon the time it takes to resolve issues found during testing and the processing time and schedule required for our institution partners.

5. Will our crisforms be transferred to Reepor? If so when? Will our current projects in CRIS roll into this new system?

All active project data that is in the CRIS database will be available to REEport. All active CRIS projects will be made available to REEport at the date of implementation.

6. Will you pre populate our current department list?

Yes, we plan to get an up-to-date department list from CRIS web-forms prior to releasing REEport.

7. Do we have to enter every single employee at our institution that will be submitting reports (ad 416/ad417/ad421) into the user screen?

Yes, however there will be an automated registration process that will allow users to "sign up", site administrators will approve the users and control their roles for that institution.

8. Will it be possible to enter multiple department associations?
No
9. Will each university have multiple 'sites' to allow for different signature? Ex: an experiment station site, a forestry site, an extension site?
Yes
10. How will institutions determine site administrator? Will they be centered around Plan of work responsibility or CRIS responsibility?
That is up to each institution, however we will import all existing CRIS web-form site administrators into REEport.
11. Will this site be used by PI's to start and submit new projects to the USDA?
Yes, to the extent that it replaces your existing AD-416 and AD-417 process. It does not change the submission process for non-formula (competitive or special) grants which will continue to go through Grants.Gov. You may set up a business process that allows PI's to start and submit projects to NIFA if you choose to do so at your institution.
12. If you are a site administrator for CRIS are you automatically a site admin for REEport?
Yes
13. How will the transition take place with the existing projects already in the CRIS database?
REEport and the CRIS database reside together on computers here at NIFA. We will make all projects in the CRIS database available to REEport.
14. Will the site administrator have to assign the ID and password for each User? Will Site Administrators be assigning individual user passwords?
Yes, however there will be an automated registration process that will allow users to "sign up", site administrators will approve the users. Users will create and maintain their own passwords; the system will handle password reset requests automatically. Userids should be the user's university e-mail address.
15. Will site administrators have access to the user id & password for each of our users?
Site administrators will have access to userid's. Passwords will not be visible to anyone. The system will allow the user to manage and reset their own password.
16. We have county based projects. Will we be able to associate users with counties as well as with departments?
No
17. What is the definition of a Project Director? (vs. other administrators)
Project Director is the term now being used in all federal grant applications. We have adopted it to be consistent with Grants.Gov standards. The Project Director is equivalent to the Principal Investigator identification used in CRIS for many years.
18. Will you facilitate downloads of existing data?
We plan to have a new tool available for end users to extract and download data. As soon as that tool is available for testing we will put into the REEport test/training sandbox.

19. Will all reporting have to be done on a project by project basis or will bulk uploads be allowed?
Project data, other than AD-419 financial reporting, will have to be done one project at a time. We are aware of the bulk data load done for AD-419 and will take that into consideration when that function is designed. We plan to address AD-419 requirements in the last half of calendar 2010.
20. Will additional information be coming forward in future web seminars on the new modules needed for submission of new projects (i.e. goals, outputs, outcomes, audience, etc.) so that this can be articulated clearly to researchers writing new projects?
We will develop a web cast for each module. We will post all web cast presentations on www.nifa.gov so that they may be reviewed at any time and will be available for you to show to your colleagues.
21. So if a password is forgotten or lost by a user, does the REEport have a way of re-setting their password for the user?
Yes. Upon request the system will generate a new password and e-mail it to the userid (thus the reason userids are e-mail addresses). Users will also be able to change their own password.
22. How long will CRIS web forms be available to initiate projects?
It is dependent upon when REEport is implemented. It will be cut off at the same time REEport is turned on in production.
23. How simple is this going to be to get the PI's dept to learn this?
REEport uses widely accepted methods that are used in on-line computer systems. We have not heard of our colleagues having difficulties understanding how similar applications work. However, we recommend sites work with the REEport testing/training sandbox in order to fully understand how it works, and devising processes that work best for you. If you encounter difficulties, please explain them to us via REEport@nifa.usda.gov.
24. Will the new web pages also replace the proposal outline as well as the CRIS webforms?
The proposal outline will not be replaced, but will be electronically up-loaded as a pdf attachment to NIFA via REEport. The Proposal is required by guidance issued by the NIFA Office of Extramural Programs (OEP).
25. Will the Site Administrator still have the ability to enter and edit, as well as submit?
Yes
26. Will there be an online help or manual to guide a user through the process for each module? Is this what the admin guidance will be?
Yes
27. I want to understand this correctly. Currently Principal Investigators use one password to enter the ALK CRIS site. They complete their reports and submit. That report is then accessible to the Site Administrator who sees that the director approves the report. Then the site administrator submits the report.
Federal information security policy requires that each individual user of federal computer systems have their own userid and password.

The site configuration set up for REEport will allow each site to set up its own process to control who enters, approves, and submits projects.

28. In REEport will reports still be reviewed by the ATR (director) before it is submitted to USDA? The site configuration set up for REEport will allow each site to set up its own process to control who enters, approves, and submits projects.
29. At the present time, our investigators enter their own 416/417 information. Administrators download that information to populate our local database. We download ALL project information. Any changes made at WebForms is passed directly to us through the download. This eliminates dual data entry and eliminates concurrency problems: our data always matches your data. Once we have the project information, we associate it with our department, and Investigator name etc and add relevant state project numbers. When 421 yearly reports are due, I get a checklist from WebForms, merge it with our database, generate appropriate lists, mail to departments etc. PI's enter their own 421. Our director reads, once approved, the administrator submits all 421s.
419s are more complex. When 419 yearly reports are due, I collect and merge with the checklist, summarize expenditure and person hour information from our university databases and merge with our project database. This provides the basis for our manipulations. Then we start moving monies and hours. My salary and time, for instance, since they are overhead to all projects, are prorated across all projects. State project monies and person hours are added directly to the associated federal project. Once all moves are made, we summarize and create a txt file to email to Carolyn Deckers. Assuming we will have to change our business model, what parts of the above will and will not work? Specifically, will we be able to download ALL our project information? Will we be able to then upload our 419 data? Our PI's know nothing about the 419's. (I realize the form names are changing.)
We plan to include the ability for institutions to receive the checklist, we are working closely with Pat Downer in Vermont to assure we replicate functions provided by CRIS Webforms. We plan to continue to support an upload capability for Financial Reporting, however we may standardize the upload as a spreadsheet file rather than text.
30. I just learned that the CRIS system will still be in effect at least until August 2010. That was unclear at the last reporting webinar...or I missed hearing it. My question has to do with signature authority and routing. Theresa Bailey said that each PD or PI would have to have their own password in REEport. What I would like to know is when the PD submits their reports does it still stay in the state until the site administrator reviews and acquires the ATR or Director's approval?
The site configuration set up for REEport will allow each site to set up its own process to control who enters, approves, and submits projects.
31. Was there a way to indicate state funding sources? We currently submit our state projects to USDA for inclusion in the CRIS database.
Yes

Questions on the Sandbox

1. Will any sandbox testing site that inputs information have that information imported to the permanent site or will it have to be entered all over again?
No. It will have to be entered again. The sandbox is intended for testing and training. However, the information entered in production may be deleted, or revised as needed before being submitted.
2. Can more than one person from an institution try the sandbox at the same time?
Yes, however the site administrator will have to set up roles and permissions as described in this web-cast. We recommend sites use the sandbox to test how multiple users work together and interact.

3. Can we start submitting Projects or Reports in the Sandbox phase? or is the site configuration capability the only task we can perform on the Reepor site as of yet?
Project initiation is also available. We will make a presentation covering project initiation available on our www.nifa.gov web site as soon as the web-master is able. However, as mentioned above, the sandbox is for testing and training, data will not be carried forward to production.
4. If we enter all our users in the sandbox, will all that information carry into the live system?
No. You might find it convenient to use generic users for the sandbox.
5. So projects initiated through the sandbox will not be considered "official" – only "test" projects?
Yes – this is only a testing environment. All entries are 'throw away!'
6. If we participate in this pilot phase...using just the available site configuration section and project initiation, we still continue to using the current CRIS database to enter the new projects?
Yes
7. What is the Email address to request an ID and password?
REEpport@nifa.usda.gov

Comments on Implementation Strategy

We feel it would be better to have the complete REEpport system implemented at once, rather than deploying it module by module.

I agree that a complete roll out of the system would be better than partial.

We agree that it would be best to roll out REEpport at one time, rather than in phases. At least, it would be most efficient/least confusing for both project initiation and project reporting to be rolled out at the same time.

I strongly urge not releasing REEpport until ALL web pages are ready (AD-416, 417, 419, 421).