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How to Use This Manual – Read This First

Instructions for NIFA Partner Institutions

NIFA Partner Institutions include most Land Grant Universities (with the exception of 1994 Tribal Colleges) and a few other institutions that have been granted partner status. The REEport financial report is completed exclusively by REEport Financial and Site Administrators at these institutions. Project Directors at Partner Institutions should work with their administrators as needed to complete financial reporting. When you login to REEport you can tell that you are affiliated with a NIFA Partner institution if there is a prefix of SAES, 1890, FRST, VET, or EXT in front of your institution’s name. For example:

REEport (SAES - IOWA STATE UNIVERSITY)

If you are NOT affiliated with a NIFA Partner institution, please see Summary Instructions for Independent Institutions below. If you are affiliated with a NIFA Partner Institution, this entire manual is applicable to completing the REEport Project Financial Report. While this document does have a relatively logical flow as related to completing the Financial Report, it is not intended to be a step-by-step guide. It is intended to highlight and explain the function of each of the core components, and how they relate to completing the financial reporting process so that users might understand the system more holistically, and be able to work at any stage in the process. Please continue to the Getting Started section, and proceed from there.

Summary Instructions for Independent Institutions

When you login to REEport, if there is NOT any prefix, such as SAES, 1890, FRST, VET, or EXT in front of your institution’s name, then you are affiliated with an Independent institution. Compare the following example against the Partner example above:
While this manual was written to be geared toward NIFA Partners, about 80-90% of it is still applicable to Independents. However, the purpose of this section is to provide a summary that highlights the most common scenarios for Independent institutions, and provides guidance for the simplest way to complete the report so that you do not need to read the whole manual. Keep in mind that if you encounter any situations or questions that are not answered in this summary section, then please refer to the Table of Contents, and locate the applicable section to answer your question.

Who is able to complete the REEport Project Financial Report?
1. Only the Project Director and Authorized Organization Representative, as listed on the NIFA Award Face Sheet, will have access in REEport to complete the report.
2. This access is assigned per award. In other words, users will have access only to those projects to which they are the named PD or AOR. They will not have access to any other projects at their institution.
3. There is no form of administrative access that can be granted to other users.

What are you reporting?
1. The source of funding for expenditures and obligations of $100 or more incurred in the most recently completed federal fiscal year, in support of a NIFA funded award. The report is due each Feb. 1.
   a. Report on activities for the fiscal year only, NOT the anniversary date of the award.
   b. Report on the source of the funds spent. The Financial Report form lists several different potential funding sources: NIFA Administered, Other Federal, and Non-Federal. NIFA funding for awards and grants is entered on line 204 of the form.
      i. It does not matter if you have drawn down funds yet or not from your ASAP account. You should report any funds spent.
      ii. If you spent internal funds, which you plan to have reimbursed from NIFA awarded monies later, then the ultimate source of the funding is NIFA, and should be entered on line 204. Any expenditures not reimbursed in this way should be classified as the initial source.
iii. If you have other sources of funding for the project, see the Column/Field Listing section for guidance.

2. Report all staff support for the project, in the form of FTEs, for the fiscal year.
   a. You do not need to break down funding sources per staff member. Just report all support, except for volunteer support.
   b. 0.1 FTE is the minimum the system will accept. If you have an entry for which the total is less than 0.1, the system will round down to zero, which is acceptable.
   c. See the Column/Field Listing section for guidance on how to calculate FTEs, and on how to classify staff roles.

How to enter data and submit the report.

Login at the NIFA Reporting Portal. Your email address is your username. If you don’t know your password, click Reset Password and enter your email to have a reset link sent to you. Use the email that was entered on the original grant application, unless you know it has been subsequently updated with NIFA. After login, click on REEport under Active Applications, then click on Financial Report in the menu bar.

You most likely will be reporting on only one award. Two or three at the most. This means you don’t need to worry about searching for the project, or using the Download function, which is for batch processing. Simply click on your project, enter your data, save, and submit:

1. Click on the Eligible for Reporting folder, which expands the folder and lists your project. Click the title of the project to open it for editing.
2. Enter your expenditure and FTE data. Click **Save**, then click **Cancel** to return to the main financial screen. Repeat steps 1 and 2 as necessary for multiple projects.
3. Verify that you have no Errors or Alerts. If you do have a project listed in either the Errors or Alerts folders, please follow the guidance in the Project Financial Reports with Errors and Alerts Folders section.

4. Having entered all your data, and addressing any Errors or Alerts, you are now ready to submit. Click Submit to NIFA, then read and accept the confirmation statement.

5. You should receive a confirmation email with an attached PDF summary of
your data. You can also click the PDF Summary button to obtain a copy. **NOTE:** the PDF Summary displays the aggregate total of the financial data reported across all projects at your institution, even if you don’t see those projects displayed. To see a PDF report specific to any one project, click the PDF link under the View column next to that project.

6. You should consider the report and your data finalized at this point. However, if you later find you have made a mistake, simply make the necessary edits, then click the Resubmit to NIFA button. Be aware that the financial reporting module is subject to close at any time after Feb. 1 without notice. Once closed, edits cannot be made in any way.

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### Getting Started

**What is the Financial Report?**

The Financial Report process in REEport replaces the old AD-419 financial report that was previously done in CRIS Webforms. It is a project level report that details all expenditures by funding source, as well as all FTEs, for the most recently completed federal fiscal year, which runs from 10/01 to 09/30 each year. The report is used for research planning and is not an auditable document. It is due February 1st each year.

**Gaining Access**

The Financial Report module is located in the REEport system, and allows two different types of user access:

1. There is centralized administrative access which allows overview and
reporting on all projects at an institution. This is available only to REEport Site Administrators and Financial Administrators at Land Grant Universities and Partner Institutions, not to include 1994 Tribal Colleges. Site Administrators manage REEport user accounts and roles, and as such, assign the Financial Administrator role. If you require access to the Financial Report module, please contact your institution’s REEport Site Administrator.

2. At all other institutions, each project/award is managed independently by the Project Director (PD) and Authorized Organizational Representative (AOR) that are named on the award. There is no centralized administration. As such, PDs and AORs will only be able to complete financial reporting on the individual awards that they directly manage, and access to the Financial Report module is provided automatically.

For information on logging into REEport, and all general questions on using the system, please go to our REEport Support Page.

Site Administrator Configuration

In order for other users to have access to the Financial Report module in REEport, Site Administrators will need to assign the Financial Administrator role. Additionally, the Site Administrator will want to set the workflows, which determines permission on who is allowed to submit completed Financial Reports to NIFA. Site Administrators: please follow the guidance below to accomplish these two tasks.
- Assign Financial Administrator Role

- Log in to the Portal and click “Administration”

- Click your institution
-Click on the user name

-Select the **Financial Administrator** role from the dropdown, and click “Save”.
• **Set Workflows**
  
  - Log in to the Portal and enter your REEport site

- Click **“Site Administration”**
-Click “Workflow”

-Click “Project Financial Reports”, choose desired workflow, and Save
General Reporting Guidance

Reporting Requirements

A project must have been active in the given fiscal year in order to be eligible for reporting in that year. If NIFA-administered funds were expended on a project during any part of the fiscal year and the total expenditure exceeded $100.00, then this financial data and any related FTEs should be entered on the project in the REEport Financial Report. Do not include projects where the total funds reported are less than $100.00. Report expenditures and unliquidated obligations for NIFA Competitive projects as well as for any Capacity projects (Hatch, Hatch Multistate, McIntire-Stennis, Evans-Allen, or Animal Health).

NIFA Administrative Projects

Funds and support years cannot be reported on NIFA Administrative projects and will not be accepted. Note: REEport will display administrative projects as eligible for reporting, but they are NOT. Any funds or FTEs entered on an administrative project will be flagged by REEport and displayed in the Errors folder and must be corrected before you will be allowed to submit your data. Administrative and Support costs must be prorated to all appropriate research projects by the institution before posting funding amounts for individual projects.

Administrative costs are centralized for administering the research programs conducted at State and other non-Federal institutions. Costs can include:

- salaries
- wages
- employee benefits
- goods and services
- travel
- equipment or
• other allowable costs

**Support Costs** are general costs of research and auxiliary activities not directly attributed to specific projects.
Examples are:
• Costs of maintaining plots when not being used for research, and general costs of maintaining dairy, beef, and swine herds, or flocks of poultry for research.
• generalized farm operational costs
• maintenance costs for plant growth and greenhouse facilities
• computer and statistical support departments, and other service units

When budgeting, you are encouraged to allocate as much as possible to the research projects, thereby minimizing the amounts budgeted to and expended for administrative and support activities.

Documentation of administrative projects is not required for federally funded programs administered by NIFA, but if administrative projects are documented they are identified by a single classification code line in the Classification section of the Project Initiation form. The classification line will consist of 001 for Knowledge Area, 0001 for Subject of Investigation, and 0001 for Field of Science. Do not report expenditures or staff support for administrative projects on the REEport Financial Report. Instead, prorate administrative costs to all appropriate research projects: McIntire-Stennis research administrative funds to McIntire-Stennis research projects; Hatch administrative funds to Hatch projects, etc. Prorate all administrative staff support (fields 241-244) to appropriate research projects. Even though charges to NIFA approved administrative projects are prorated back to the appropriate research projects in the REEport system, you must be able to document charges to the approved administrative projects at your institution for audit purposes.

Administrative and central service/support expenditures may be prorated back to regular research projects by computing an adjustment factor for each REEport Financial Report field. These factors are then used to adjust the original REEport Financial Report entries. If staff years are reported under administrative or central support projects, they should also be prorated using the same factors.
This procedure is not required, but represents a straightforward approach. Depending upon the amount of time and resources available, states may wish to prorate administrative costs for running the research director's office to all projects; prorate department administrative costs only to projects within the department; and prorate support costs to the various user projects (for example, cost of maintaining dairy herd to all dairy projects). Regardless of approach, you must also use the same process to prorate staff years utilized in administrative and centralized support categories to REEport projects.

**Employee Fringe Benefits**

The cost of employee benefits for all staff support reported on REEport projects, as well as prorated administrative and contract service/support accounts, should be included as expenditures on the REEport Financial Report. These include employer contributions for Social Security, retirement plans, health plans, group life and disability plans, and other payroll taxes paid by the employer. If actual data for these expenditures are available from your institution, they should be included on the report. If not, you may need to prorate the costs to all projects reported to REEport. In many states, employee benefit expenses are charged to a central institution or state pool, and actual expenditure data are not available. In these cases, determine the average cost of employee benefits as a percentage of salary for your institution. Either obtain the figure from the central unit responsible for managing benefits, or use the rate that your institution suggests for developing grant applications. If neither is available then possibly check rates with peer institutions - and based on that information determine a reasonable rate to use in preparing your reporting amounts. Once you have determined the rate as a percentage of salary costs, calculate the amount of employee benefit costs to be added to the report expenditures as follows:

\[
\text{Example: Total Salary Expenditures on the projects} = \$750,000 \\
\text{Employee Benefit Rate} = 26\% \\
\text{Estimated Employee Benefits Expense} = (\$750,000 \times .26) = \$195,000
\]

Prorate the Estimated Employee Benefits Expense to individual projects based on either total expenditures or salary expenditures using the most efficient method.
for your situation.

**Column/Field Listing and Guidance**

Following is a complete listing and guidance/explanation for each of the columns/fields found in the REEport Financial Report.

- Project Number – column A
- Accession Number – column B
- Field 201 - Hatch – column C
- Field 202 Regional Research– column D
- Field 203 McIntire/Stennis– column E
- Field 204 NIFA Grants– column F
- Field 205 Animal Health or Evans-Allen– column G
- Field 219 USDA– column H
- Field 209 NSF– column I
- Field 310 DOE– column J
- Field 308 AID– column K
- Field 311 DOD– column L
- Field 316 NIH– column M
- Field 312 Public Health– column N
- Field 313 HHS– column O
- Field 314 NASA– column P
- Field 315 TVA– column Q
- Field 318 Other Fed– column R
- Field 220 State– column S
- Field 221 Self Generating– column T
- Field 222 Industry Grant– column U
- Field 223 Other Non-Fed– column V
- Field 241 Scientist Years– column W
- Field 242 Professional Years– column X
- Field 243 Technical Years– column Y
- Field 244 Clerical Years– column Z
• **Project Number**
  o This number identifies the project as assigned and maintained in the records of the reporting institution. The project number is prefixed with a variation of the three-or four-character institution code (controlled by REEport Site Administrators) to insure a unique identity across all institutions.

• **Accession Number**
  o The Accession Number is the unique, seven-digit identifier assigned by REEport. There is a difference between Accession Numbers assigned when a project was initiated into CRIS, and projects that are now initiated in REEport.
    - REEport Accession Numbers are seven digits and begin with a “1” – For example 1004972.
    - CRIS Accession Numbers (copied over into REEport but no longer used) are six digits long and typically begin with a “2” – For example 224198.
    - Older projects may begin with a “1”, and may be shorter than six digits, since the accession number is simply an incrementing number for each new project entered into the system.
    - CRIS previously used leading zeros to pad the accession number up to seven digits, however leading zeros are no longer used in REEport.

• **Field 201-205: NIFA Administered Federal Research**
  o These fields are mutually exclusive, with the exception of fields 201 and 202, where Hatch dollars may be reported on both fields, while Hatch-Multistate dollars may only be reported on field 202.

• **Fields 209, 219, 308-318: Other Federal Research Funds**
  o These fields are used for reporting Federal funds administered by Federal agencies other than NIFA, and for grants made by NIFA with pass-through funds from other agencies. Appropriate funding amounts should be entered in these fields corresponding to the source of the funds. These categories may be used by NIFA administered projects to report appropriate amounts for these fields making sure the correct NIFA administered amounts are reported in fields 201 - 205.
- **Field 219: USDA Contracts/Grants/Cooperative Agreements**
  - Field 219 is for reporting funds received from contracts, grants, or cooperative agreements with USDA agencies other than NIFA. Do not use this field for any NIFA administered funds.

- **Fields 209 and 308-318: Other Federal Research Funds**
  - These fields are for Federal departments or agencies outside the USDA that may finance work conducted by or for the reporting institution. If funds from some other Federal source not listed on the Financial Report form are involved, or if reporting NIFA administered pass-through funds, enter the amount in field 318.

- **Field 318: NIFA Pass-Through Funds**
  - These are funds received by NIFA from other Federal agencies, such as the Department of Energy, Department of Defense, or other USDA agencies, through interagency agreements. These funds are distributed through grants and cooperative agreements to non-federal institutions. Since these funds were not appropriated to NIFA, they should not be reported in fields 201 - 205. Expenditures of NIFA pass-through funds should be reported in field 318. **DO NOT REPORT NIFA FUNDS EXPENDED ON A NIFA GRANT AWARD IN FIELD 318.**

- **Fields 220-223: Non-Federal Research Funds**
  - These categories may be used by NIFA administered projects to report appropriate amounts for the indicated fields. Funds should be entered in these fields corresponding to the source. Do not use these fields to report any NIFA administered funds.
    - **Field 220: State**
      - For State appropriations.
    - **Field 221: Self-Generating**
      - For funds expended from self-generating accounts, such as the sale of products, royalties, or interest.
    - **Field 222: Industry Grant**
      - For funds from contracts, grants, or agreements to the institution or grantee by industrial organizations,
corporations, commodity commissions, and firms; for example, grants from food processors, manufacturers of containers, chemicals, machinery, equipment and fertilizer, transportation companies, and power companies.

- **Field 223: Other Non-Fed**
  - For funds from any other non-federal source not included in 220, 221, or 222 such as local governments, professional societies, individuals, banks, etc.

- **Fields 241-244: Non-Federally Employed Staff Support**
  - An FTE is defined by the Government Accountability Office (GAO) as the number of total hours worked divided by the maximum number of compensable hours in a full-time schedule as defined by law. For most NIFA partners and places of employment, a full-time schedule as defined by law equates to 2,080 hours of work (52 weeks multiplied by 40 hours per week). Thus, a person who works 40 hours per week for 52 weeks towards a project equals 1 FTE. A person who works 20 hours per week towards a project for 52 weeks per year equals .5 of an FTE.
  - *You should include all FTEs that supported the project, regardless of source of funding* (i.e. FTEs funded by NIFA non-formula or formula grants, other Federal funds, State, or Other funds should all be included). NOTE: it is not allowed to report staff support on a project without corresponding expenditures, i.e.- no volunteer FTEs.

- **Field 241: Scientist**
  - A research worker responsible for original thought, judgments, and accomplishments in independent scientific study. This includes investigation leaders and project leaders and portions of the time of supervising scientists or staff assistants who meet the preceding definition. Examples: Professor, Associate Professor, Assistant Professor, Scientist.

- **Field 242: Professional**
  - A professional does not qualify as a scientist under the preceding definitions but may still significantly contribute to research activities. Professionals usually hold one or more college degrees and have otherwise
qualified for employments in a professional category. Generally, professionals have a high degree of research activity responsibility but do not hold principal investigator status or equivalent at the reporting institution. Examples: Department Head, Resident Director, Statistician, Analyst, Assistant Director, Dean.

- **Field 243: Technical**
  - Technical Staff are associated with research efforts in a technical capacity and do not participate in the investigative aspects of the research. Effort is typically directed toward a specific project(s). Examples: Lab Assistant, IT Professionals, Mechanic, Carpenter, Machinist, Skilled Tradesperson.

- **Field 244: Administrative and Other**
  - These are clerical and support staff who contribute to the non-technical support of the project. It is often difficult to assess an individual's clerical and labor support to any one project; they usually support groups of researchers of different projects in a broad manner, such as by ordering supplies, typing reports, managing bill payments, performing janitorial work. Examples: IT Staff, Secretary, Typist, Repairman, Janitor, Data Entry.

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**Understanding and Using the Financial Report Components**

While this document does have a relatively logical flow as related to completing the Financial Report, it is not intended to be a step-by-step guide. It is intended to highlight and explain the function of each of the core components, and how they relate to completing the financial reporting process so that users might understand the system more holistically, and be able to work at any stage in the process.
Entering the Financial Report Module

- Click “Financial Report”

Setting the Fiscal Year

REEport defaults to display the year for the current reporting cycle, and automatically filters to display only the projects that are eligible for reporting in that fiscal year. You can choose to select any previous year in order to view or download a record of the projects and data as reported in that year.
Project Financial Reports Eligible for Reporting

This is the heart of the module. Think of this folder as the worktable where all data is entered and displayed. For the purposes of this document, consider all references to the “worktable” as synonymous with the Eligible for Reporting folder. By expanding the folder, you can see a listing of all projects that were active in the selected fiscal year – in other words, all the projects that are eligible for reporting.

Below is a snapshot of the folder expanded. Note the “Total Expenditures” column, where you can view the total expenditures entered for each project, and also the “View” column, where you can pull up a PDF showing the line item entries for each project individually.

There are two ways to enter data:

1. You can manually key in data on each project one at a time.
2. You can batch upload all data at once using a .csv file. See Using the Download and Upload Function sections for instructions.

In order to manually key in data on an individual project, you need to click on the project title to open it for editing, as indicated by the left red arrow below.
Here is a partial view of an opened project, ready for editing. At the top is listed all of the header information identifying the project, with all of the line item fields below that – ready for entry of all expenditures and FTEs.
IMPORTANT NOTE: Just because projects are displayed in the, “Project Financial Report Eligible for Reporting” folder, it does not mean that you are necessarily required to report on them. Below are the possible exceptions:

- No Expenditures
  - While a project may have been active, and therefore eligible for reporting in a given fiscal year, it is possible that the project had no expenditures, in which case there would be nothing to report.

- State Projects
  - Reporting on State projects has always been, and will continue to be, optional. There are several factors that should be taken into account when considering whether to report on State projects. Please see the, Documentation of State Projects as Related to Formula Funding section located in the FAQ at the end of this document.

- RREA
  - REEport does not provide an appropriate field for reporting on Renewable Resources Extension projects, and so financial reporting on these projects is not required.

Using the Search Filter

As was already stated, the “Project Financial Reports Eligible for Reporting” folder contains all of your organization’s projects that are eligible for reporting in the selected fiscal year. Utilizing the search utility however, you can filter and select which of these projects will be displayed according to your needs.
NOTE: Typically it is best to search on only one field at a time. Also, a helpful hint - to see the list of all available options in one of the search fields, type one character, then backspace, as shown in the “Funding Source” field above.

Using the Download Function

Clicking the “Download” button downloads a .csv file to your computer of all projects and data found in the “Project Financial Reports Eligible for Reporting” folder.

Below is an example of an opened .csv file. Note that it is already populated with the Accession and Project Number of the projects found in your “Project Financial Reports Eligible for Reporting” folder.

IMPORTANT NOTES about the downloaded .csv file:
• The purpose of this file is for you to enter your expenditures and FTE data for upload back into REEport, as a means to batch the data in, rather than manually entering data on each project one at a time.
• The data found in the downloaded file is directly connected to the current state of the “Project Financial Reports Eligible for Reporting” folder:
  o Any filters that are in place from the search utility will be reflected in the .csv. For example, if you have filtered to display only Hatch projects, then the downloaded .csv will be populated with only those projects.
  o Any data previously been entered into the worktable, whether manually or by .csv upload, will be reflected in the .csv download.
• You are able to generate your own .csv file for later upload. Be aware that if you do so, you will want to make sure that the formatting exactly matches the format found in the downloaded .csv file. Please see the Instructionsto Format the CSV or Excel File section for details on proper formatting. You should review this section even if using the downloaded .csv file.

Using the Upload Function

After you have entered your data into a .csv file, you use the “Upload” button to upload the file into REEport.

![Image of Upload button](image)

IMPORTANT NOTES about the Upload function:
• There is no confirmation of successful upload – the data simply populates into the worktable – it is successful if there is no error. Note: uploading a file does not submit it to NIFA.
• Errors are possible
  o Incorrect file extension – only .csv files are accepted.
  o If an Accession Number in the .csv file does not match on an eligible project listed in the REEport worktable. In such cases an error message should display, indicating the project in question.
• Upload overwrites existing data in the worktable.
  o For example, if you had previously entered data into REEport on Accession #1004567, and now in your.csv file data has been altered on Accession #1004567, the upload will update the worktable with the data in the .csv file.
  o A project must be present in the .csv file in order for it to have any update effect in REEport. For example, if you want to delete previously entered data on a project via upload, you must enter zeros or blanks on the project in the .csv file. **Removing the project row from the spreadsheet and then uploading does not remove previously entered data from it in REEport.**

• Rather than using the downloadable .csv file, you may choose to upload one generated from within your institution. If so, be aware that you will want to make sure that the formatting exactly matches the format found in the downloaded .csv file. Please see the Instructions to Format the CSV or Excel File section for details on proper formatting. You should review this section even if using the downloaded .csv file.

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**Project Financial Reports with Errors and Alerts Folders**

After data has been entered into REEport - whether directly on each project, or by .csv batch upload - both the **Errors** and **Alerts** folders serve as filters that notify you of any data issues that need review.

**Errors** - are issues that must be corrected before data can be submitted to NIFA. The system physically will not allow data to be submitted while any errors are in place - the **Submit to NIFA** button becomes subdued and cannot be clicked.
There are two ways to view any errors. First, you can click on the blue “Errors” button, which brings up a summary of all errors:

![Errors button]

This provides the convenience of seeing all errors in one place. At this point, if you had used the .csv upload to enter your data into REEport, now you could make all corrections in the .csv file at once, upload it, and clear all errors simultaneously.

The second method to view errors is to click on each individual project that is flagged with an error (as indicated by the red arrows below), and view each error one at a time. While in each project, this is where you could make manual edits to correct the error.

![Project financial report with errors]

- [Expand All Folders]
- [Collapse All Folders]
Below we have clicked on one of the projects with an error, which opens the project for editing and displays the error message in the red banner at the top. In this example, we can see that McIntire-Stennis expenditures have been reported on a Hatch project, which is not allowed. There are several other conditions that can also generate errors. In all cases simply read the error text, which guides you to make the appropriate changes to clear the error.

**Alerts** - are issues that require your review, but need correction only if you find the data to be inaccurate. The purpose of alerts is to call your attention to potential inaccuracies. Alerts do not prevent submission to NIFA.

Alerts do not have a summary view. In order to view Alerts you must click on a project in order to see the alert message related to that specific project.
Below, we have clicked on the project with an alert, which opens the project for editing and displays the alert message in the gold banner at the top. In this example, we can see that funding greater than $100,000 was entered, but with no Staff Support. This is allowed, but requires your review to make sure this was not a data entry error, since this level of funding is typically coupled with staff support. If appropriate the data can now be corrected and saved, which will clear the alert. There are several other conditions that can also generate alerts. In all cases simply read the alert text, which guides you to make the appropriate changes to clear the alert if needed. NOTE: alerts on Non-Formula projects due to entered expenditures of $0 is allowed, provided the data is correct.

Your report has the following alerts.
The following field entries have generated alerts:

- Accession F... has a value greater than $100,000 in the Total All Funds (234) field with no value in the Staff Support category. Please verify that this is correct, or add values to the Staff Support category.

Keep in mind the Alerts and Errors folders are simply filters meant to highlight any projects that contain data issues.

- A project found in either the Alerts or Errors folder will still be found in the Eligible for Reporting folder.
- Clicking on the same project found in either folder accomplishes the same result of opening the project for editing.
Viewing the Summary PDF

After entering data and clearing any Errors or Alerts, you can review your data by clicking the “Summary PDF” button, which displays the totals of all line items in a PDF document.
<table>
<thead>
<tr>
<th>Organization Name</th>
<th>Fiscal Year</th>
<th>Date Submitted to NIFA</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Allocation of Funds to Project at Location

<table>
<thead>
<tr>
<th>Field Number</th>
<th>FY 2014 Actual $</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal Funds NIFA Administered</td>
<td></td>
</tr>
<tr>
<td>Hatch Funds</td>
<td>201</td>
</tr>
<tr>
<td>Multi-State Funds</td>
<td>202</td>
</tr>
<tr>
<td>McIntire-Stennis Funds</td>
<td>203</td>
</tr>
<tr>
<td>Contracts, Grants, Cooperative Agreements</td>
<td>204</td>
</tr>
<tr>
<td>Other Funds (Animal Health Sec. 1433, Evans-Allen, Other NIFA Administered)</td>
<td>205</td>
</tr>
<tr>
<td>Total NIFA Funds</td>
<td>231</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other Federal Funds</th>
</tr>
</thead>
<tbody>
<tr>
<td>USDA Contracts, Grants, Cooperative Agreements</td>
</tr>
<tr>
<td>National Science Foundation</td>
</tr>
<tr>
<td>Department of Energy</td>
</tr>
<tr>
<td>Agency for International Development</td>
</tr>
<tr>
<td>Department of Defense</td>
</tr>
<tr>
<td>National Institutes of Health</td>
</tr>
<tr>
<td>Public Health Service</td>
</tr>
<tr>
<td>Health and Human Services</td>
</tr>
<tr>
<td>National Aeronautics and Space Administration</td>
</tr>
<tr>
<td>Tennessee Valley Authority</td>
</tr>
<tr>
<td>Other Federal Funds (Including NIFA Administered “Pass Through” Funds)</td>
</tr>
<tr>
<td>Total Other Federal Funds</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Non-Federal Funds</th>
</tr>
</thead>
<tbody>
<tr>
<td>State Appropriations</td>
</tr>
<tr>
<td>Self-Generated Funds</td>
</tr>
<tr>
<td>Industry Grants and Agreements</td>
</tr>
<tr>
<td>Other Non-Federal Funds</td>
</tr>
<tr>
<td>Total Non-Federal Funds</td>
</tr>
</tbody>
</table>

| Total All Funds | 234 | 4,999.00 |

### Staff Support - Non-Federal Employed (Report nearest 0.1 Year)

<table>
<thead>
<tr>
<th>Staff Effort Actual (years)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scientists (Assistant Professor and above)</td>
</tr>
<tr>
<td>Professional Support</td>
</tr>
<tr>
<td>Technical Support</td>
</tr>
<tr>
<td>Clerical, Labor and Other</td>
</tr>
<tr>
<td>Total Staff Years</td>
</tr>
</tbody>
</table>
Submitting to NIFA

Once you have cleared all Errors, reviewed any Alerts, and ensured your data is accurate, you can submit your report to NIFA by clicking the “Submit to NIFA” button. NOTE: all projects listed in the Eligible for Reporting folder are submitted together as one file, and projects that contain all zeros or blanks are acceptable provided there was nothing to report on them for that fiscal year.

After clicking Submit, read and agree to the confirmation statement:

After clicking OK, you will receive confirmation at the top of the module:
Resubmitting to NIFA

If after submitting your data it is determined that edits need to be made, you can do so at any time while the current reporting cycle is still open. After making appropriate edits, you will need to resubmit your updated report to NIFA. You do so by clicking the “Resubmit to NIFA” button, which appears only after the initial report submission.

NOTE:
- Be aware that once the reporting cycle closes YOUR DATA CANNOT BE ALTERED. The reporting cycle can potentially close at any time after February 1st without notice.
- In REEport, there is no running history of prior submissions. The appearance of the “Resubmit to NIFA” button is the only residual indicator that the Financial Report has previously been submitted in the current reporting cycle.

Instructions to Format the CSV or Excel File

When working with a .csv or Excel file, and preparing it for upload into REEport, it is essential that you ensure it is properly formatted. Failure to do so may result in upload failures, or possible data inaccuracies where some data unintentionally becomes altered, removed, or misreported. Please carefully follow the steps outlined below:

1. If you are using the downloadable .csv from REEport, please carefully follow the instructions below:
   a. Do not remove the three header rows. REEport will automatically remove these upon upload. If you remove the headers, your first three projects will be removed instead.
b. Do not add any extra columns or rows for summaries, comments, or for any other reason.
c. Do not change the order of the columns.
d. Make sure not to alter any Accession or Project Numbers; any changes will result in errors.
e. Make sure there are no dollar signs or commas in any of the cells.
f. Do not enter any negative values.
g. For all expenditures entered in columns C-V, you may have as many decimal places as you like, but they will automatically be rounded to the nearest cent.
   i. Note that in previous years, pre-REEport, decimal places were not allowed for expenditure entries.
h. For all FTEs entered in columns W-Z, you may have as many decimal places as you like, but they will automatically be rounded to the nearest tenth.
i. Blank cells will be treated as zeros, so either a blank or zero is acceptable.

2. If you have generated your own Excel spreadsheet, please carefully follow the instructions below:
   a. Make sure the column order exactly matches the following:
      i. Project Number – column A
      ii. Accession Number – column B
      iii. Field 201 - Hatch – column C
      iv. Field 202 Regional Research– column D
      v. Field 203 McIntire/Stennis– column E
      vi. Field 204 NIFA Grants– column F
      vii. Field 205 Animal Health or Evans-Allen– column G
      viii. Field 219 USDA– column H
      ix. Field 209 NSF– column I
      x. Field 310 DOE– column J
      xi. Field 308 AID– column K
      xii. Field 311 DOD– column L
      xiii. Field 316 NIH– column M
      xiv. Field 312 Public Health– column N
      xv. Field 313 HHS– column O
      xvi. Field 314 NASA– column P
      xvii. Field 315 TVA– column Q
xviii. Field 318 Other Fed—column R
xix. Field 220 State—column S
xx. Field 221 Self Generating—column T
xxi. Field 222 Industry Grant—column U
xxii. Field 223 Other Non-Fed—column V
xxiii. Field 241 Scientist Years—column W
xxiv. Field 242 Professional Years—column X
xxv. Field 243 Technical Years—column Y
xxvi. Field 244 Clerical Years—column Z

3. No additional columns or rows, with the exception of point 5 below, should be added beyond what is listed above, such as summary columns or notes, etc.
4. Do not change the order of the columns.
5. When your file is uploaded into REEport, the first three header rows will be discarded. Therefore you must make sure to maintain three header rows containing NO project data in your file.
   a. Note that the downloadable .csv file already has these three header rows in place, and you may reference it as an example.
6. All Accession and Project Numbers must match exactly to the eligible projects listed in the REEport worktable; any changes will result in errors.
7. Make sure there are no dollar signs or commas in any of the cells.
8. Do not enter any negative values.
9. For all expenditures entered in columns C-V, you may have as many decimal places as you like, but they will automatically be rounded to the nearest cent.
   a. Note that in previous years, pre-REEport, decimal places were not allowed for expenditure entries.
10. For all FTEs entered in columns W-Z, you may have as many decimal places as you like, but they will automatically be rounded to the nearest tenth.
11. Blank cells will be treated as zeros, so either a blank or zero is acceptable.
12. After ensuring that your Excel spreadsheet is properly formatted according to the guidelines above, use the “Save As” function within Excel, and save the spreadsheet as a .csv file. See below. Now it is ready for upload into REEport.
FAQ

Documentation of State Projects as Related to Formula Funding

Documentation of, and reporting on State projects always has been, and will continue to be optional. However, historically many institutions have opted to document and report financial expenditures on State projects as a means to bolster formula funding calculations for the Animal Health and McIntire-Stennis programs, as well as for other reasons. Please read the explanations below so that your institution can make the determination of whether to report State project expenditures.

1. McIntire-Stennis
   a. In REEport, the documentation and reporting of financial expenditures on forestry related State projects DOES impact the formula calculation for the amount of McIntire-Stennis dollars your institution will receive in a given year. The percentage entered into the “Forestry Component” field is specifically taken into account. NOTE: these expenditures may also be reported on McIntire-Stennis projects.

2. Animal Health
   a. In REEport, the documentation and reporting of financial expenditures on Animal Health related State projects DOES NOT impact the formula calculation for the amount of Animal Health dollars your institution will receive in a given year.
   b. There is a separate process called the Capacity Report, which is conducted directly with Dr. Robert Smith, outside of REEport. In this process, it is your institution’s responsibility to report all Animal Health related projects. This demonstrates capacity and has a direct impact on Animal Health dollars received from NIFA.

3. General Documentation
   a. Some institutions choose to use REEport simply as a convenient repository where all of their State projects can be documented, tracked, and made publicly available. No financial reporting is required on such projects.
For more information about specifics of formula (capacity) funding calculations:
- Brenda Barnett – 202-401-6520 BBARNETT@nifa.usda.gov

For more information about the Animal Health Capacity Report:
- Dr. Robert Smith – 202-401-4952 rsmith@nifa.usda.gov
- Lisa Stephens – 202-401-6438 lstephens@nifa.usda.gov

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**Reporting FTEs on Both the Financial Report and Progress Reports**

FTEs are required for both the Financial Report and for individual Progress and Final Reports. Yes, this is the same data being reported twice. NIFA worked very hard to avoid this, but for various reasons was unable to do so.

There are additional FTE fields in the Progress and Final Reports that are not found in the Financial Report, and so we understand that the reported numbers may not exactly match. However, all numbers reported should be accurate.

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**Reporting on Field 204 - NIFA Grants**

In recent years, financial reporting on field 204 was not required for Non-Capacity projects. However, starting with the FY2015 reporting cycle, reporting on field 204 for NIFA awards is now required. Please keep in mind:

- Beginning with FY2015 expenditure reporting, NIFA highly encourages reporting on field 204 for all NIFA awards. However, only awards that were made on Oct. 1, 2014 (FY2015) and beyond will technically be required to report on field 204. For example, if your institution was granted a NIFA competitive award that began in FY2013, then you are not required to report field 204 expenditures or FTEs for that grant in the REEport Financial Report. This is true for the life of the grant, even if it runs into FY2015 and beyond. The exception to this is if the grant ever receives any type of continuation funding, at which point reporting on field 204 would become required.
- Each Feb. 1st, you should report on the most recently completed fiscal
year, NOT on the calendar year based on the award’s Anniversary Date.

- For example, if a grant has an Anniversary Date of 05/01/2015, then the REEport Financial Report would be due 02/01/2016, reporting on any expenditures and FTE’s that occurred from 10/01/2014 to 09/30/2015, or FY2015.
- In other words, an award’s Anniversary Date is irrelevant with respect to the REEport Financial Report, and you should report based on the fiscal year.
- REEport Annual Progress and Final Reports are still completed and submitted per the award’s Anniversary Date.

- The SF-425 report is still required on all NIFA awards, and is submitted via email as a PDF attachment, sent to awards@nifa.usda.gov. This must be completed in addition to reporting on field 204 in the REEport Financial Report. For any questions about completing the SF-425, please contact NIFA program staff managing your grant, as found on the Award Face Sheet.

**Financial Reporting Checklist**

The “Eligible for Reporting” folder in the Financial Report module is your checklist, which you can download into the .csv file. Additionally, you can use the “Reports” module within REEport to generate various reports which may suit your needs. Instructions are found within that module.

**The OD-1088**

The OD-1088 report shows allocations per institution of NIFA Capacity grant funds for the fiscal year, and is posted here under “General Resources”. Refer to this document to compare allocations received to the expenditures you will be reporting for a given fiscal year. **NOTE: currently the 1088 form is not available. Plans to develop it for future reporting are in process.**
Accession Numbers and Leading Zeros

The Accession Number is the unique, seven-digit identifier assigned by REEport. There is a difference between Accession Numbers assigned when a project was initiated into CRIS, and projects that are now initiated in REEport.

- REEport Accession Numbers are seven digits and begin with a “1” – For example 1004972.
- CRIS Accession Numbers (copied over into REEport but no longer used) are six digits long and typically begin with a “2” – For example 224198.
  - Older projects may begin with a “1”, and may be shorter that six digits, since the accession number is simply an incrementing number for each new project entered into the system.
  - CRIS previously used leading zeros to pad the accession number up to seven digits, however leading zeros are no longer used in REEport.

Verification and Director’s Reports

As part of the financial reporting process done in previous years through CRIS Webforms, NIFA would generate and return to each institution two sets of reports based on submitted data - Verification and Director’s Reports. Starting with the FY2015 reporting cycle, Verification and Director’s Reports are no longer provided. Please read below for more detail on the function of each, and what has changed with respect to REEport:

- **Verification Reports**
  - The purpose of these reports was twofold:
    - To identify any errors in the submitted data that require correction by the institution.
    - To provide a summary of the submitted data for review and confirmation of accuracy by the institution.
  - Change in REEport
Starting with the FY2015 reporting cycle, the error checking function of the Verification Reports has been programmed into REEport, with errors now being displayed in the Errors folder. Since it has become an integrated part of the reporting process, the Verification Reports are no longer required.

- **Director’s Reports**
  - The purpose of these reports is for information only. They summarize your institution’s reported data in various ways which you may find useful.
  - Change in REEport
    - Production of the Director’s Reports has been transferred to REEport, specifically as part of the “Reports” module, where they can be produced on demand, throughout the year. NOTE: the specific module that produces these reports is labeled “Financial Details.” See the section below for instructions on how to produce these reports.

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**Financial Details Reports and Pivot Tables**

This section is intended to provide basic instruction on how to perform a Financial Details search, export the results to a spreadsheet, and create useful pivot tables that reasonably fulfill the intent of the previously provided Director’s Reports. This is not an in-depth pivot table training course. The core basics of creating a pivot table are presented, along with a few examples that replicate some of the past Director’s Reports, which should give you the tools necessary to create almost any other custom report you may need. For more in-depth guidance on using all the features of the search utility beyond what is presented here, hover your mouse over the embedded Help Text within the utility, or see the guide - Facet Searching for Project and Financial Details in Enterprise Search.

- **Accessing the Module**

  There are two ways to enter the Financial Details module: 1. Click on the Financial Details tab from the Portal Home page. 2. Click on the Financial Details link from the Reports module within REEport. See screen captures
below.
Here is what the search utility looks like:
• Setting Filters

By default, all existing financial records for all organizations are initially displayed. Using the filters found down the left-hand side of the screen, you are able to narrow down the data set. For the purposes of replicating the Director’s Reports, you will want to filter to your organization, and to a specific fiscal year. Locate the filters Fiscal Year and Recipient Organization and set them accordingly. Note the example below where setting these two filters has narrowed our results from 24,158 to 179, displaying financial records only for FY2014, and only for that specific organization.

![Image of Fiscal Year filter](image)

![Image of Recipient Organization filter](image)

• Exporting Results

Prior to exporting your results, expand the Show these fields in the results... menu, and select the fields you would like to have included in an export. Note that not all fields are selected by default. See example below.
IMPORTANT NOTE: the Project Classifications field is not selected by default. If you wish to see a breakout of the classifications per project, this will need to be selected. Also note that selecting this option will increase the number of results returned, since there are typically multiple lines of classification per project.

After selecting the desired fields, click the Export button in the upper right of the screen. This will allow you to download a .csv file that can be opened in Excel.
• **Understanding the Export**

Below is a screen capture of a portion of the file that was exported. In this example, *Project Classifications* was NOT selected for output. Because of this, note that there is only one row per project, and that the amounts listed in each column represent the total for that project.

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Accession</td>
<td>Departme Funding $</td>
<td>Award Amount</td>
<td>Total All Fund</td>
<td>Total NIFA Funds</td>
<td>Total Oth</td>
<td>Total Non</td>
<td>Total Staff</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>1004543</td>
<td>Economic NON FORI</td>
<td>880000</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>1004249</td>
<td>Agric &amp; Bi NON FORI</td>
<td>1008702</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>1003975</td>
<td>Horticultu NON FORI</td>
<td>1276336</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>1003371</td>
<td>Net Res Ec NON FORI</td>
<td>746496</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>1003087</td>
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<td>491774</td>
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<td>20504</td>
<td>470870</td>
<td>1.8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>1003086</td>
<td>Natural Re HATCH</td>
<td>164170</td>
<td>0</td>
<td>0</td>
<td>164170</td>
<td>1.5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>1003051</td>
<td>Natural Re MCINTIRE</td>
<td>38263</td>
<td>5590</td>
<td>32673</td>
<td>0</td>
<td>0.1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>1002803</td>
<td>Agronomy HATCH</td>
<td>633378</td>
<td>83053</td>
<td>552325</td>
<td>5</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>1002732</td>
<td>Agricultur HATCH</td>
<td>0</td>
<td>0</td>
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<td>0</td>
<td>0</td>
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</tr>
<tr>
<td>11</td>
<td>1002542</td>
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<td>124107</td>
<td>33488</td>
<td>35743</td>
<td>50876</td>
<td>1.9</td>
<td></td>
<td></td>
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<tr>
<td>12</td>
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<td>0</td>
<td>0</td>
<td>62640</td>
<td>0.5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>1002477</td>
<td>Agronomy NON FORI</td>
<td>910198</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

In the next example, *Project Classifications* WAS selected for output. Now we can see that classification columns are displayed, and that there are multiple rows per project, depending on the number of classifications assigned to it.
Most importantly, the amounts listed in each column are a weighted breakout per the classification percentage. To see this, compare the Award Amounts on the project highlighted below vs. the example for the same project above.

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
<th>K</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accession</td>
<td>Department</td>
<td>Funding S</td>
<td>Knowledge Are Subject of Inv</td>
<td>Field of Science</td>
<td>Percentage</td>
<td>Award Amount</td>
<td>Total Non</td>
<td>Total NIFA</td>
<td>F Total Other</td>
<td></td>
</tr>
<tr>
<td>1004543</td>
<td>Economic: NON FOR [605]</td>
<td>Natural R</td>
<td>[0210] Water</td>
<td>[1010] Economics</td>
<td>100</td>
<td>660000</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>1004249</td>
<td>Agric &amp; Bio NON FOR [402]</td>
<td>Enginee</td>
<td>[1820] Soybean</td>
<td>[2020] Engineering</td>
<td>100</td>
<td>1038702</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>1003975</td>
<td>Horticultu NON FOR [102]</td>
<td>Soil, Plan</td>
<td>[1599] Grain</td>
<td>[1103] Other micro</td>
<td>50</td>
<td>638218</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>1003975</td>
<td>Horticultu NON FOR [101]</td>
<td>Appraisal</td>
<td>[1939] Soil ana</td>
<td>[1000] Biology</td>
<td>50</td>
<td>638218</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>1003371</td>
<td>Nat Res &amp; NON FOR [135]</td>
<td>Aquatic a</td>
<td>[0810] Finfish</td>
<td>[1031] Breeding</td>
<td>10</td>
<td>74649.6</td>
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<td>0</td>
<td></td>
</tr>
<tr>
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<td>Reproduc</td>
<td>[0810] Finfish</td>
<td>[1031] Breeding</td>
<td>40</td>
<td>296358.4</td>
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<td>0</td>
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</tr>
<tr>
<td>1003371</td>
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<td>[0810] Finfish</td>
<td>[1080] Genetics</td>
<td>20</td>
<td>149299.2</td>
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<td></td>
</tr>
<tr>
<td>1003371</td>
<td>Nat Res &amp; NON FOR [135]</td>
<td>Aquatic a</td>
<td>[0810] Finfish</td>
<td>[1080] Genetics</td>
<td>20</td>
<td>149299.2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

- **Creating Reports with Pivot Tables**

With your downloaded .csv file open, press Ctrl + A on your keyboard. This will select your entire dataset. Next, in Excel click on the **Insert** tab, and then on **Pivot Table**, as shown below.
The **Create Pivot Table** dialog box should open. The **Table/Range** should already be selected from the previous step when you pressed Ctrl + A, and **New Worksheet** should already be selected by default. Click **OK**.
You should see a new blank worksheet with a Pivot Table interface. Now, to create various pivot tables, you simply drag and drop the desired fields from the **Pivot Table Fields** section, into either the **Rows** or **Values** sections, as shown below.

In this particular example, we want to know the total amount of funding spent per department, and then to have each department further broken out by the amount of funding spent per Project Director within each. We additionally added a few other funding lines into the **Values** section to see how much of each of these was spent in the same way, per department. Below is the report that is generated.
To take the example further, let's say we only want to see spending per Department, without the Project Director breakout. In this case, we simply remove the Project Director field from the **Rows** section by dragging it back up to the **Pivot Table Fields** section. Below is the result.

<table>
<thead>
<tr>
<th>Row Labels</th>
<th>Sum of Total All Funds</th>
<th>Sum of Hatch Funds</th>
<th>Sum of Multistate Funds</th>
<th>Sum of Mc-Stennis Funds</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ag &amp; Bio Engineering</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Bern, CA, J.</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
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As one final example, let’s say we want to see spending per Knowledge Area classifications. Again, we simply remove the Department field by dragging it back up to the **Pivot Table Fields** section, and then drag the Knowledge Area field down to the **Rows** section. Below is the result.

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<th>Row Labels</th>
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<th>Sum of Hatch Funds</th>
<th>Sum of Multistate Funds</th>
<th>Sum of Mc- Stennis Funds</th>
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Given these examples, you should now be able to see how you can generate many different types of custom financial reports to answer a variety of questions for your organization. As a rule of thumb, for most reports you’ll want to put funding lines, funding totals, and FTEs in the **Values** section, and factors such as Department, Project Director, Classifications, Fiscal Year, etc. in the **Rows** section.

One final tip for working with pivot tables. As you drag fields to their sections, be aware that you can change the function you want performed on the field, such as Sum, Count, Average, etc. in the **Value Field Settings**. See below.
Considerations

Be aware of the following considerations:

Regarding the first and third points above - there is always an extended period of time during which financial data for the most recently completed fiscal year is still being collected. If you attempt to search data on other organizations, there is the possibility of finding incomplete data or data that is subject to change. However, if you know that your institution’s data has been submitted, it is available in the search the day after submission.