REEport Operational Reports User Guide

Understanding How to Use and Generate Operational Reports

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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"

-Click your institution

-Click on the user name

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

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.

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.

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.

↕ 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
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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

1,918 Results Found

↔ Hide Filters ↕ Filter Chooser

Filters

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

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

Funding Source Type
- FORMULA (1,336)
- NON FORMULA (541)
- STATE (41)

Department
- 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 (

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.

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.