SC EPSCoR Project Reporting Portal

https://scepscor.org/Solicitations/portal/index.php

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INTRODUCTION

The SC EPSCoR Program developed the Reporting Portal to facilitate collection of information that will be used as part of the MADE in SC Annual Report to NSF. This brief Users Guide has several screen shots (sometimes partial) to illustrate the various features and steps.

The following are the Reporting Portal Changes for Year 3:

- Under the Accomplishments Section:
  - Research Accomplishments should now be uploaded as a WORD document. The contents of this document must follow the template provided in the Portal.
  - Other Activities Completed This Period is where accomplishments in workforce development, education, equipment use, etc. are entered.
  - Work to be Done During the Next Reporting Period is the work planned to take place after the current reporting period.
- The Impact Section is now a separate section and participants should enter the impact of their research, workforce development activities, etc.

- Summary Comments now also should include description of any changes or problems encountered with an explanation of the impact on the project.

ACCESSING THE SC EPSCoR PORTAL

The SC EPSCoR Portal contains two main functions:

- Proposal/offer submission (open to all), and
- Project Reporting (by invitation only).

The Portal can be accessed from the SC EPSCoR main webpage at http://scepscor.org/ then clicking on the Login menu option. The user may also access the portal directly by using the following link: https://scepscor.org/Solicitations/portal/index.php which leads directly to the login page.

The rest of this brief users guide is related to Project Reporting. A separate guide is available on the Portal for proposal/offer submission.

PORTAL REGISTRATION

Only Project participants can register and enter information into the Portal. Consequently, registration for the Portal is by invitation. Participants will receive a notification email as to when they can register and should follow these steps:

- To register, go to https://scepscor.org/Solicitations/portal/index.php and click the link titled, please click here to register. Then enter your email address and click the Submit button to access the registration form.
- Complete any missing information, including demographics and click the Submit Registration button. An email will be sent to you with a temporary password. (*Note: sometimes these emails end up in the junk mailbox.*)
- To login, click the Login button near the top of the page. Enter your email address and the temporary password you received by email, then click Login again. You will be asked to change your password. After doing so, return to the login view and login with the new password.

MAKING CHANGES

The Portal provides several editing options (buttons). These are:

Record Data

After entering the information required in a Form (subsection), pressing the Record Data button saves the information that was just entered.

Edit/Delete

This option populates the Form with the item being selected. The user can then make changes to the data entered and click Update Form to make the change effective or delete the record. The use is not allowed to edit/delete entries made by other users.

Delete Record

Deleting a record requires two steps. First, select Edit/Delete. This option will populate the Form. Then to delete the record, press Delete Record. This two-step process will delete all information pertaining to the Form entry being displayed. *Records that are deleted are not recoverable*.

Clear Form and Add Another Entry

This function will simply clear the Form and make it available for another entry.

Edit Team Members

If this function is displayed, it will allow the user to go to the TEAM MEMBERS screen to make changes (additions, deletions or re-ordering members). This function may also appear as Edit Author or Edit Mentor or Edit Presenter, etc. depending on the active Form.

Edit Attribution to Goals

If this function is displayed, the user can go directly to the GOALS ACTIVITIES screen to make changes to the Strategic Plan goals activities selected.

REPORT SELECTION

After logging into the Portal, you should select the Report you would like to view or work on. Currently, Previous year's reports are limited for viewing what has already been entered. Select the Year 3 report to enter data for Year 3. Figure 1 is a screen shot of the Report Selection Screen.

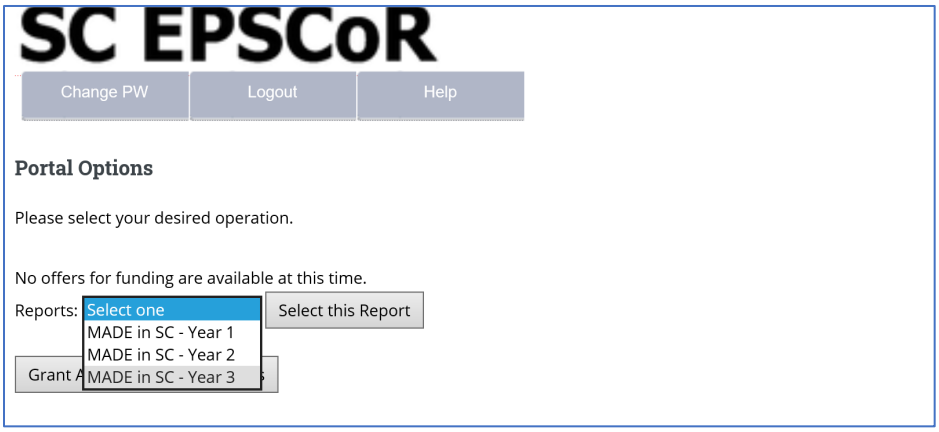

Figure 1. Report Selection Screen

PORTAL STRUCTURE

The reporting structure of the Portal contains the various sections and components of the actual report that will be submitted to the NSF each year and at the end of the project (in 2022). Participants may enter data for some or all sections of the report. A "participant" is defined as any faculty member or researcher involved in the project, regardless of their role in the project or the project activities in which they are engaged.

The Portal is structured so that the user must first select a Section. A Section may have several subsections, called Forms, where information is entered. Table 1 shows the various Sections and their Forms. An "X" in the Team Member and Goals Activities columns indicate that these two pieces of information are required for that specific Form. Participants must identify the Project Title first. Changes implemented for Year 3 reporting are in blue in Table 1.

Table 1. List of Report Sections and Forms

SECTION	Project Title	FORM (or Subsection)	TEAM MEMBERS	GOALS ACTIVITIES
Accomplishments	X	Research Accomplishments		
	X	Other Activities Completed this Period	X	X
	X	Work to be Done Next Reporting Period	X	X
Products	X	Journal Publications	X	
	X	Conference Papers of Presentations	X	
	X	Books	X	
	X	Book Chapters	X	
	X	Mentoring	X	
	X	Thesis/Dissertations	X	
	X	Research Proposals	X	
	X	Curriculum Course Development	X	
	X	Workshops Presented or Developed	X	
	X	Collaborations	X	
	X	Patents	X	
	X	Inventions	X	
	X	Licenses	X	
	X	Websites or Other Products	X	
Impact	X	Impact		
Work Effort (Months)		Months worked		
Summary Comments	X	Summary Statement/Changes/Problems		
Responsible Conduct of Research		Responsible Conduct of Research Certification (not for faculty)		

ENTERING DATA

The Reporting Portal has three "screens" for entering data. The DATA ENTRY CONTROLS screen, the TEAM MEMBERS screen and the GOALS ACTIVITIES screen. The DATA ENTRY CONTROLS screen is the main entry to report data, and most data is entered in this screen. The two other screens are accessed based on the user's activity on the DATA ENTRY CONTROLS screen. In some cases, a Form on the DATA ENTRY CONTROLS screen will lead the user to the TEAM MEMBERS screen and then the GOALS ACTIVITIES screen, while others may only guide the user to the TEAM MEMBERS screen as outlined in Table 1.

The user should select the Sections and Forms for which they have information to enter. More information can be added, and corrections can be made later. Sections and Forms for which there are no information to enter should be left blank.

DATA ENTRY CONTROLS

The DATA ENTRY CONTROLS screen contains several selection menus. It is advisable that the user explore all features before embarking on data entry. The selection menus are:

- **Year.** This is the current year of the project (i.e., June 2, 2019 – June 1, 2020) for which reporting data is being collected.
- **Section.** This can be thought of as a section of a report document, such as the sections of the NSF Annual Report template.
- **Project.** This is the title of the project the user is entering information about. If the user is working on two different projects, such as workforce development and research or two research projects, then two project titles must be entered.
- **Forms.** A Section may have several Forms, like subsections of an actual report. For example, the Products section has Forms for Journal Publications, Presentations, Books, etc.

At the top of the DATA ENTRY CONTROLS screen there are buttons for entering or reviewing your demographics and for report generation.

IMPORTANT! Demographic information is for NSF reporting purposes. A screen shot of the DATA ENTRY CONTROLS screen is shown in Figure 2. However, this information is voluntary.

The View Additional Reports and View My Report allow the user to view all the information entered by participants. The View Additional Reports button allows the user to view reports by other users, institutions or to view full report that has been entered by all users.

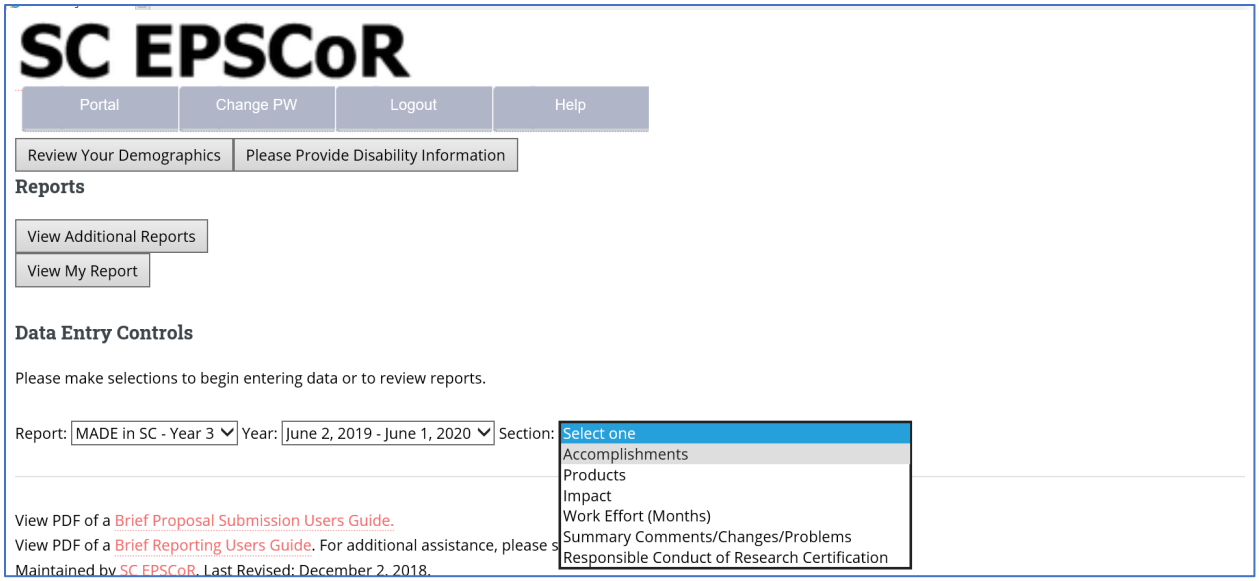

Figure 2. DATA ENTRY CONTROLS Screen Showing Report Sections

ENTERING INFORMATION.

To enter data, select a report Section. The list of Sections is shown in Figure 2 and in the first column of Table 1.

Select a Section then select a Form to complete. The list of Forms for each section are shown in the third column of Table 1.

For Year 3 reporting, the user is asked to provide a project title. This is the project for which data will be entered. If the user is currently working on more than one project under the MADE in SC umbrella, the user must enter titles every project. It is advisable to enter one project title, then enter into the portal all the information related to that project. Then enter a second project title and its data. Figure 3 shows the Project selection after the "Accomplishments" section has been selected.

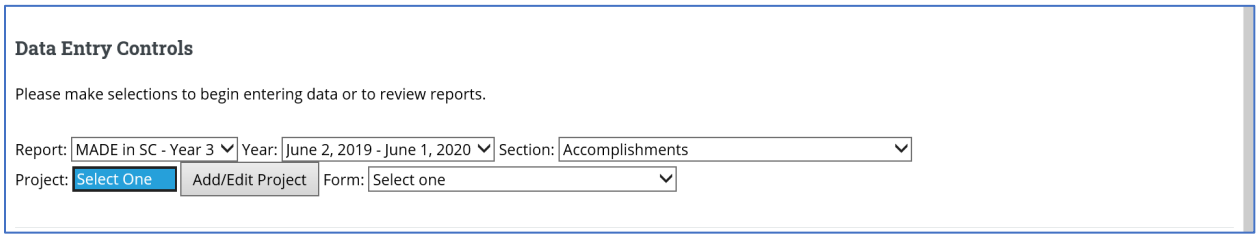

Figure 3. DATA ENTRY CONTROLS Screen Showing the Project Selection.

After entering a project title, the use can then select a subsection or Form and start entering data for the available Forms.

Select the Form you wish to complete then fill out the form. Figure 4 shows the three forms under the “Accomplishments” section as shown in Figure 4. and the “Other Activities Completed this Period” being selected.

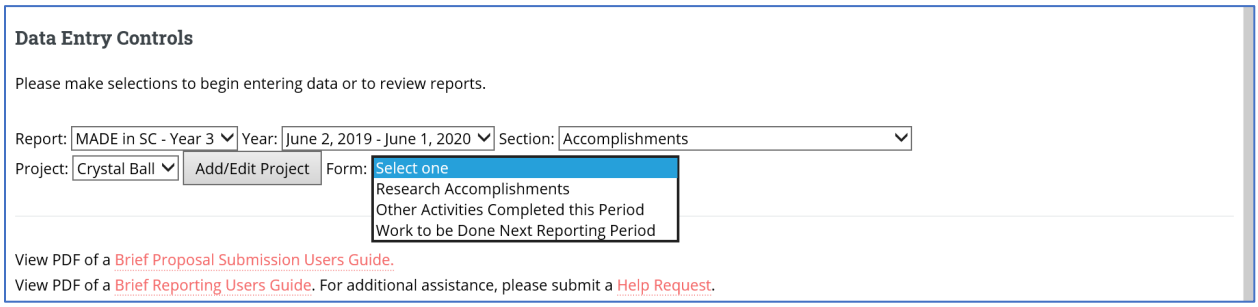

Figure 4. DATA ENTRY CONTROLS Screen Showing Forms for the Accomplishments Section.

Selecting the Research Accomplishments form will result in a screen to upload a WORD document which must include the information required and shown in the template. Figure 5 is a screen shot after uploading the WORD document and pressing Record Data.

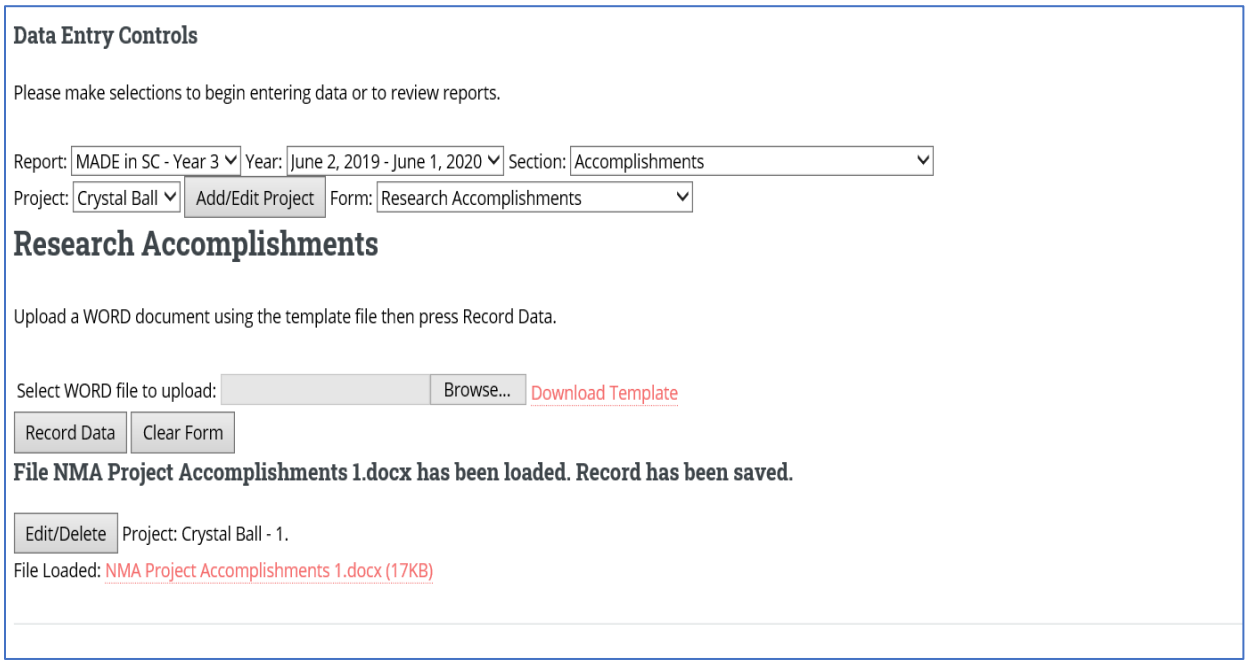

Figure 5. DATA ENTRY CONTROLS Screen Showing Research Accomplishments Form Completed.

The Accomplishments Section has two additional forms: Other Activities Completed this Period and Work to be Done Next Reporting Period. Figure 6 is an example of the Forms with a text box to enter information.

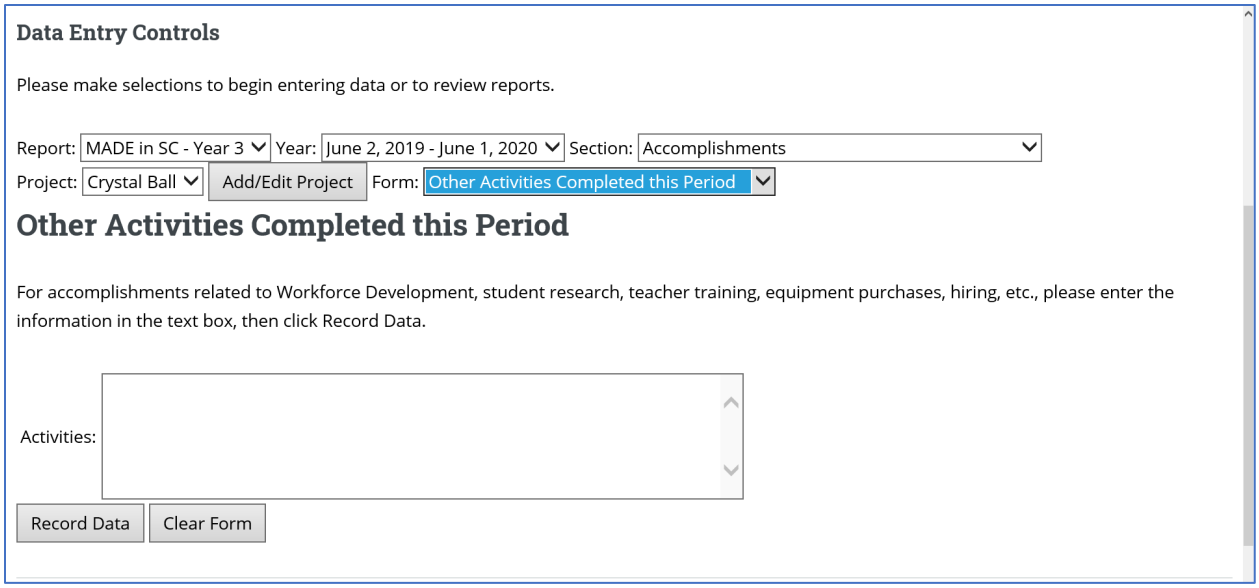

Figure 6. DATA ENTRY CONTROLS Screen Showing Other Activities Completed Form.

After the activities and the associated accomplishments are entered into the text box, and the Record Data button is pressed, the user is directed to select from a list or enter the names of the team members who worked on these activities. In addition, the user will also be requested to select the Goal, Objective and Activity from the MADE in SC Strategic Plan. These two additional entries are explained in subsequent sections.

Figure 7 shows the “Journal Publications” Form which is part of the “Products” Section. In this type of Form where several pieces of information are requested, the user should enter as much information as is currently available. For example, if the Journal paper is “submitted” for possible publication, then the user would not enter the Volume, Number, or the pages, etc. or upload a copy. However, if the paper has been published, then the user should complete all the data required and upload a copy of the published article.

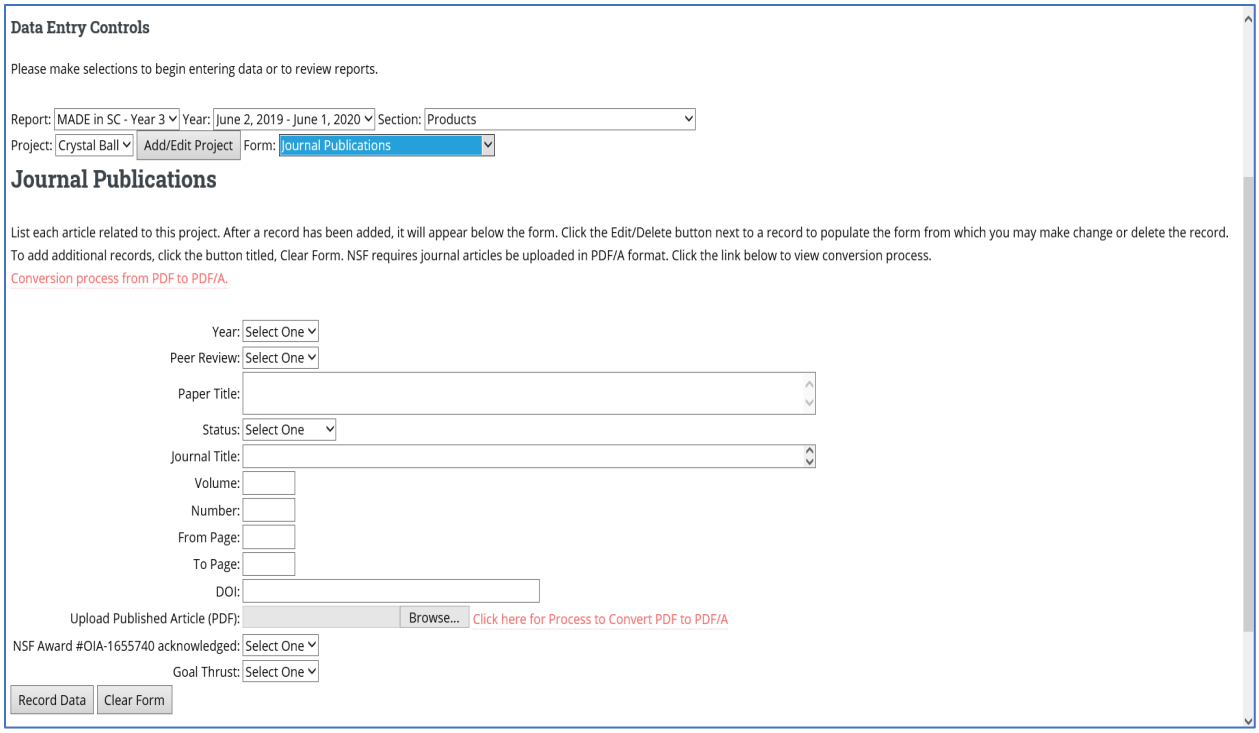

Figure 7. DATA ENTRY CONTROLS Screen showing the “Journal Publications” Form.

The user can upload copies of documents related to some Forms. Upload only documents that have been published. Whenever a document is to be uploaded in this section, please remember the following important file requirements:

1. Only PDF files can be uploaded in this Section.
2. Do not upload fillable PDF files without first “printing” them as pdf files. To upload a fillable PDF file, print the file as a PDF, then upload the printed file. You may also upload a scanned copy of fillable PDF files.
3. The largest file size that can be uploaded is 8 MB.

TEAM MEMBERS

The TEAM MEMBERS screen allows the user to add team members associated with the Form being completed. On this screen, the user may select MADE in SC team members from a pull-down list or add others who are not on the list of project participants by entering their names, one at a time. The TEAM MEMBERS screen is shown in Figure 8.

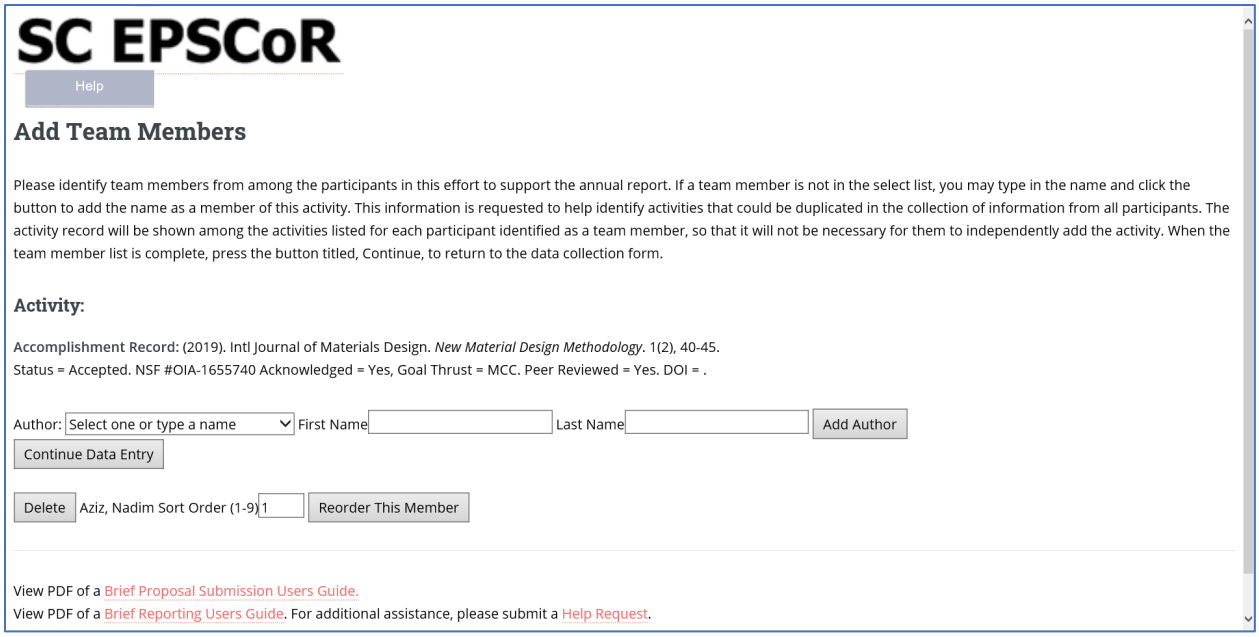

Figure 8. TEAM MEMBERS Screen

The TEAM MEMBERS screen shown in Figure 8 has the following features:

- The list of MADE in SC participants is already built into a pull-down list for easy selection.
- If the team member is not a MADE in SC participant, the team member's name can be entered manually.
- There is no limit on the number of team members that can be added to a given Form.
- The name of the team members added will appear at the bottom of the screen.
- The list of team members can be re-ordered as necessary, such as to match the order of authors on a paper.

Figure 9 shows the TEAM MEMBERS screen after a team member has been added. The names added could be from the pull-down menu or added manually by entering their first name and last name.

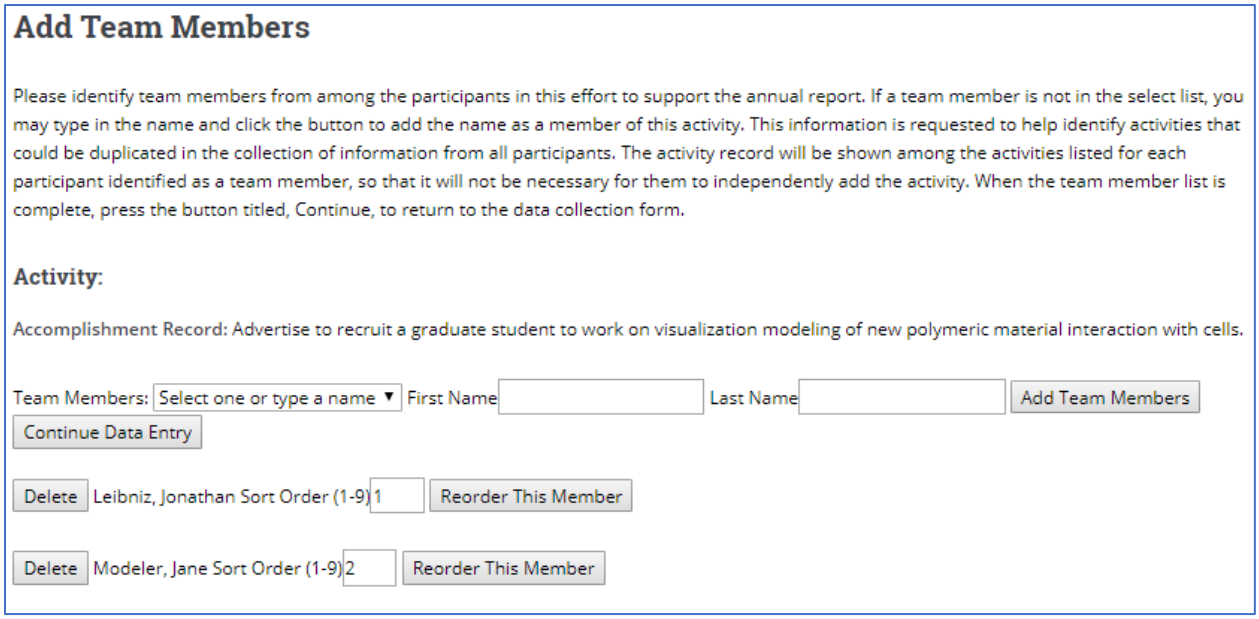

Figure 9. TEAM MEMBERS Screen showing three Team Members Selected and their Order.

Notice the option to reorder the list of team membes. To reoder the sequence of team members, enter the number in the box click the Reorder This Member button. When satisfied with the order of the team members, click Continue Data Entry.

IMPORTANT NOTE. If a MADE in SC team member is added, all relevant entries related to the Form will also appear in that team member's report. This minimizes the duplication of effort.

After all members have been added and sorted in the desired order, press the Continue Data Entry button to record this data and exit the TEAM MEMBERS screen.

GOALS ACTIVITIES

This screen is used to link the activities "accomplished" or "planned" by the MADE in SC participants to the MADE in SC Strategic Plan (version 3) that was approved by NSF. Only two Forms will lead the user to the GOALS ACTIVITIES screen. These froms are in the "Accomplishments" Section:

- "Other Activities Completed this Period", and
- "Work to be Done Next Reporting Period"

Therefore, it is extremely important that every participant enter data for these two Forms and indicate how their work is related to the Strategic Plan. This information will assist the Project Team in evaluating how we are meeting the goals and objectives of the Project.

Figure 10 shows a partial screen of the GOALS ACTIVITIES screen before any selections on this screen are made. In this case, an abbreviated version of the entire Strategic Plan is displayed.

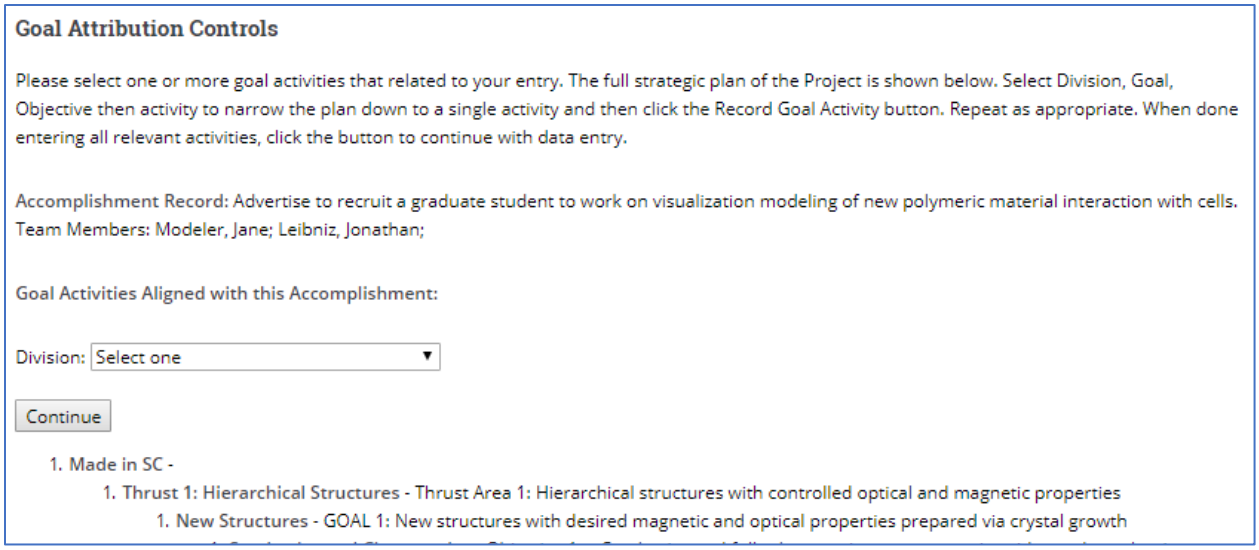

Figure 10. GOALS ACTIVITIES Screen

Since the MADE in SC Strategic Plan contains Divisions such as Thrust 1, Thrust 2, …, Workforce Development, Diversity, etc., the user should select the Division that best represents the Form entry. Figure 11 shows the GOALS ACTIVITIES screen with the drop-down menu list of Divisions.

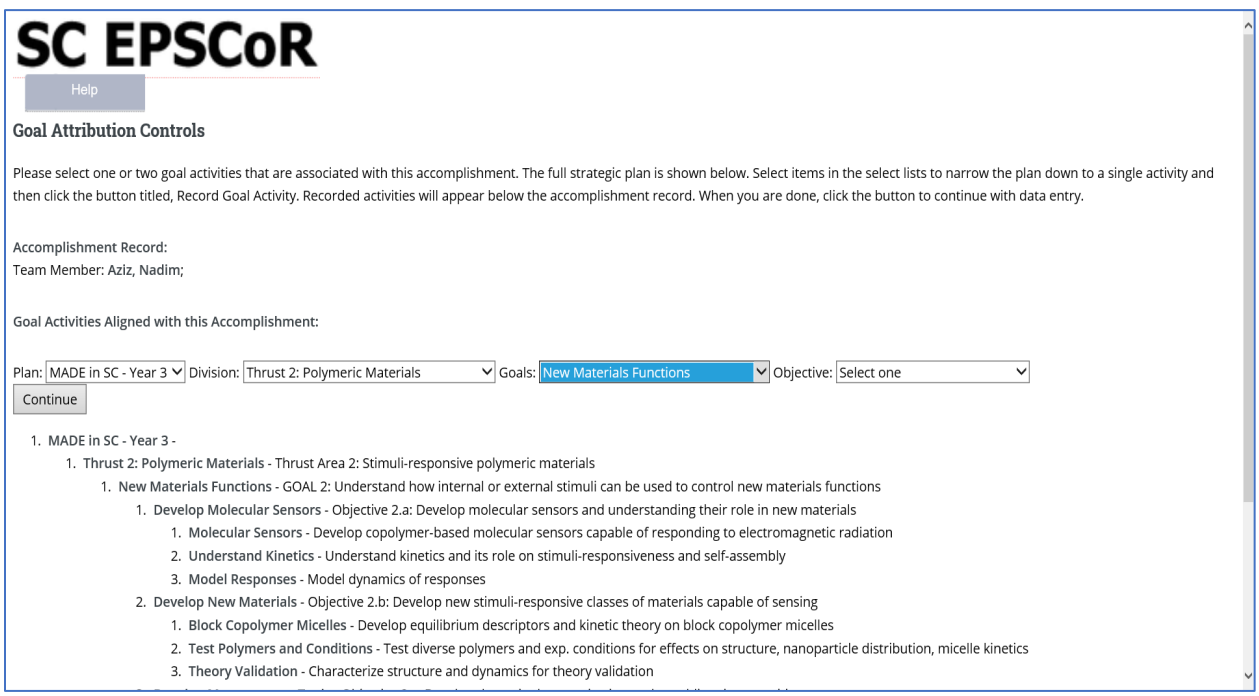

Figure 11. GOALS ACTIVITIES Screen Showing the Strategic Plan Divisions

The user should then select the Goal, Objective and Activity for the selected Division. After each selection, the relevant portion of the Strategic Plan is displayed and is reduced as the selection is made from Division to Activities.

After the Activity selection is made, press Record Goal Activity. If appropriate, more than one activity from different Goals and/or Objectives can be assigned to the Form. All selected Activities will be displayed for the user to review and ensure the correct choices have been made. Figure 12 shows an example of the GOAL ACTIVITIES screen after two Activities have been selected.

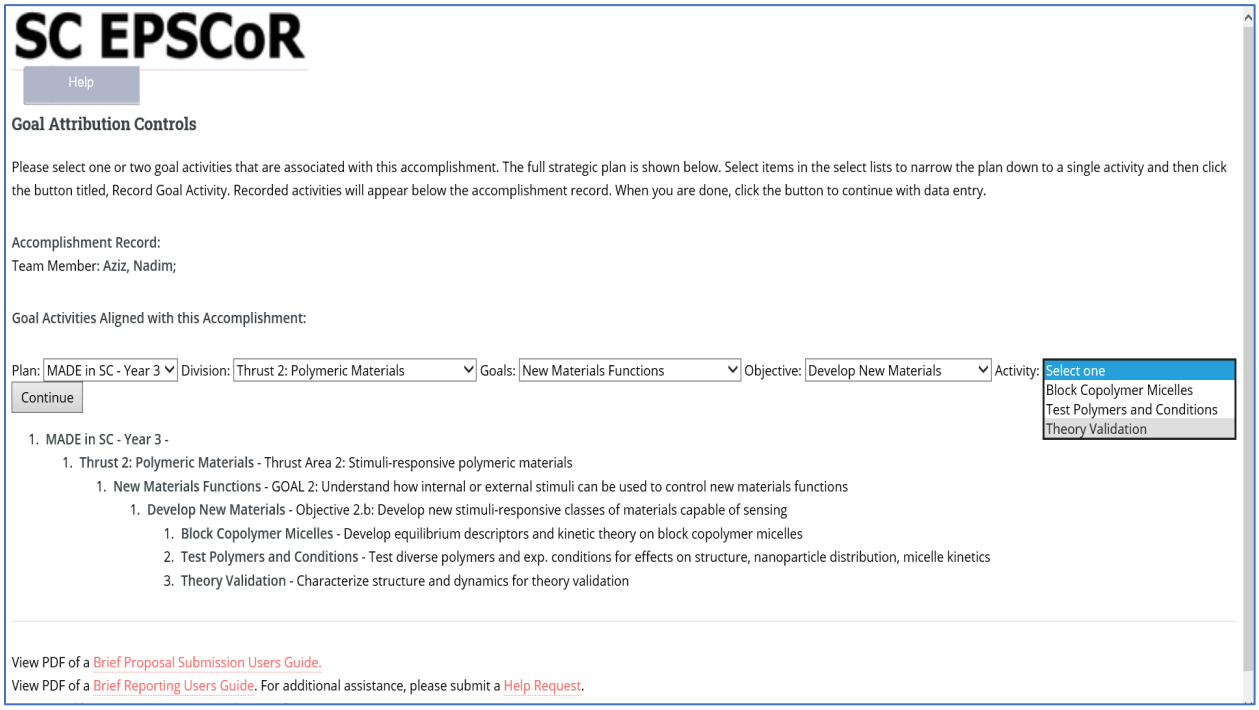

Figure 12. GOALS ACTIVITIES Screen Showing Several Activities Selected

After all goal activity selections are made, press Continue to return to the DATA ENTRY CONTROL screen. The TEAM MEMBERS and the GOALS ACTIVITIES will appear on the DATA ENTRY CONROL scree.

The user may then move on to enter data for another Form that is relevant to his/her work on the project. All data entered can be updated later as more information becomes available.

GENERATING A REPORT

The user can view their own report by pressing the View My Report button or can view other reports by pressing the View Additional Reports button. The latter button will allow the user the view the full report by all users, view the report by institution, or by an individual user. In addition, reports can be generated by topic, such as journal paper, proposals submitted, etc.

To return to DATA ENTRY CONROLS screen from the report view, press the Return to Data Collection button.