M-AAA Reporting Portal User Guide

The New M-AAA Reporting Portal
(Scan the QR code below to go to the Portal.)

Celine Yim and Jane Payumo
MSU AgBioResearch Research Evaluation and Data Analytics Team
ABR.Research.Admin@msu.edu

If you encounter any problems when using the M-AAA Reporting Portal, please contact the Research Evaluation and Data Analytics Team at ABR.Research.Admin@msu.edu.

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1. Introduction

1.1 Purpose of the App

This user guide provides comprehensive guidance and instructions on how to effectively use the newly designed reporting system for M-AAA (The M-AAA Reporting Portal), helping users understand the features and functionalities of the web application[1] or the "Portal" for short.

1.2 Key Features

The M-AAA Reporting Portal consists of two pages – Information Page and Reporting Page, allowing the principal investigators (PIs), who were funded by the M-AAA program, to manage their report(s). With this new reporting system, PIs can view their report due dates and enter, save, and submit their report before the deadline. It offers intuitive icons and visual cues for better page navigation and user experience. Additionally, it provides real-time notifications every time PIs save and submit a record into the system.

2. Getting Started

2.1 System Requirements

The M-AAA Reporting Portal was designed and built using Microsoft's Power Apps application licensed by Michigan State University (MSU) and runs in the Microsoft cloud environment. The application leverages the capabilities and infrastructure provided by Microsoft, allowing users to access and use the App through compatible web browsers without having to download and install any additional hardware or software.

Hardware Requirement	Software Requirement
Users do not require any specific hardware specifications beyond those necessary to access the internet and run a web browser, but they need to have an **active Office 365 account**.	The primary software requirement for using the App is a compatible and up-to-date **web browser**. It is recommended to use the latest version of one of the following browsers: 1) Microsoft Edge 2) Google Chrome 3) Mozilla Firefox 4) Safari

2.2 Accessing the Portal

After the successful login, the Portal may ask the user to allow the data connections (Figure 1) if you are a first-time user. The Portal is only accessible with your MSU email address, and you may need to switch your account to your MSU account by clicking 'Switch account'. Clicking "Allow" leads the user to the welcome page of the Portal. Any other registration is not required.

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[1] This user guide uses the terms web application, App, system, and Portal interchangeably.

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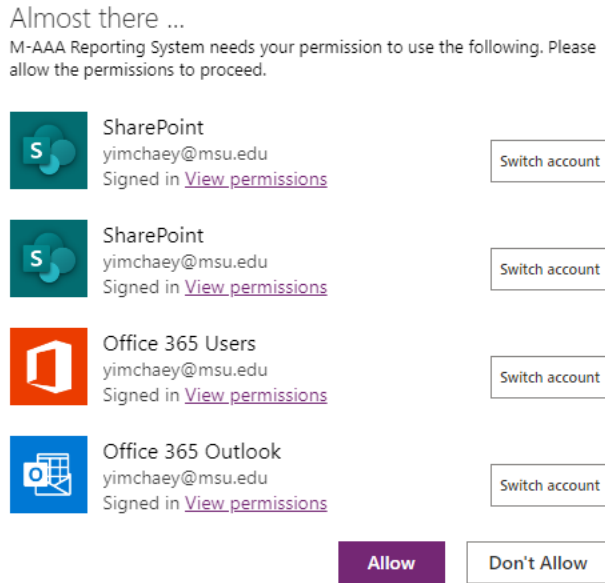
Figure 1. Prompt to allow the data connection.

2.3 Logging In

Every principal investigator (PI) funded by the M-AAA program is permitted to log in to the Portal and view their proposal list and the corresponding due dates for progress report and final report. Should you have any issues logging into the Portal, please contact the Research Evaluation and Data Analytics Team at ABR.Research.Admin@msu.edu.
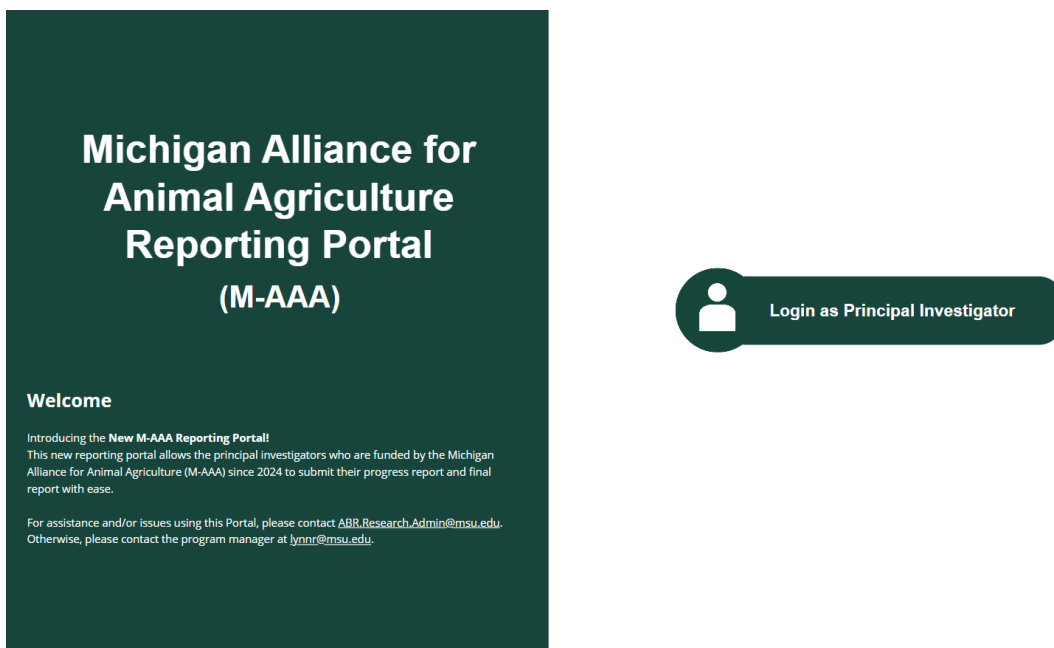
Figure 2. Main page of the Reporting Portal

3. Submitting Reports

3.1 Overview
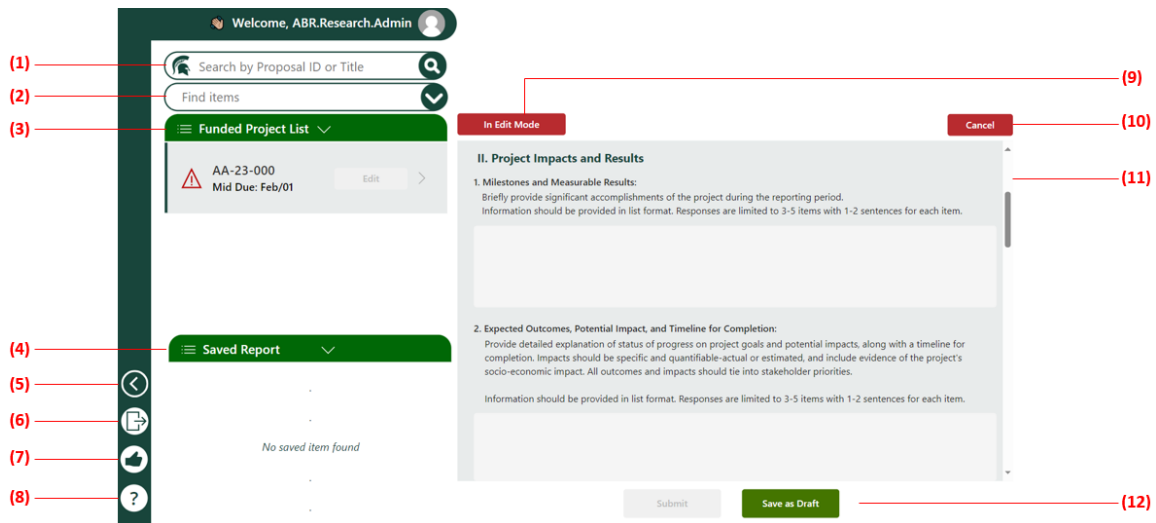
Figure 3. Reporting Portal and key components.

(1) Search Bar: Enables PIs to instantly search for specific proposals by typing the proposal ID or relevant keywords or phrases from the proposal title. This feature simplifies the process of locating funded projects.

(2) Report Type Dropdown: Found below the search box, this filter dropdown allows PIs to sort and display proposals based on the required report type.

(3) Funded Project List: On the left section of the page, it displays the list of PI's M-AAA funded projects for. The list includes basic information such as proposal ID and report due dates. Clicking 'Edit' button from the list allows PIs to open a new reporting form on the right-hand side of the page. When a red warning icon is visible, it indicates the report is overdue. Be sure to check for this visual cue and due date information to submit reports on time.

(4) Saved Report: It displays the list of saved reports that users are working on. When users have a saved report for a proposal ID, they are not allowed to create a new saved report for this proposal (i.e., they can only edit the saved report to submit a report for the proposal.)

(5) Go to the Back Page Button: The arrow icon navigates to the previous page, which shows information about M-AAA report requirements and the user's funded proposals.

(6) Sign-out Button: The sign-out icon, when clicked, navigates to the home page, the main login page.

(7) Feedback Button: Allows PIs to submit feedback about user experience and functionality of the Portal.

(8) FAQ Button: When clicked, displays frequently asked questions, answers, and contact information if users need help using the Portal.

(9) Status Icon: Displays two modes: view mode and edit mode. View mode (blue color) allows users to view proposals while the edit mode (red color) allows the user to create or edit a proposal.
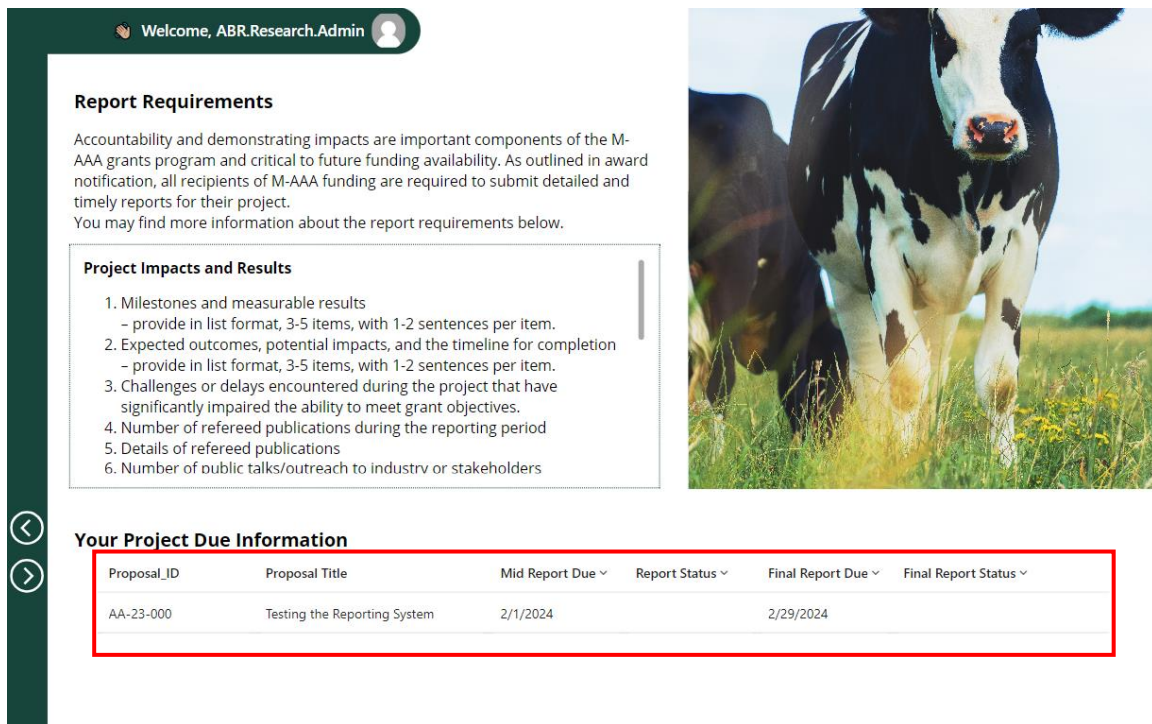
(10) Cancel Button: Allows users to cancel the editing and close the reporting form.

(11) Reporting Form: PIs can enter all necessary details for the required fields and save/submit the report when ready. The primary information including proposal ID, title, the full name of the PI, and report type are automatically populated.

(12) Save / Submit Button: Enables PIs to save or submit a report. When clicked, a confirmation or acknowledgment email notification will be sent to the user's email address.

3.2 Checking Due Dates

PIs can now check each due date – progress report due date and final report due date – anytime they want using this portal. Once logged in, the list of funded projects is displayed at the bottom of the page, along with the project title and report status (e.g., 'Accepted' when the report was accepted by the program manager or 'Pending' when the report has been submitted but is still waiting to be accepted.)

Figure 4. Page to check information about report due dates.

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3.3 Saving a Report as Draft

Clicking the 'Edit' button in the 'Funded Project List', a new form is created on the right-hand side of the page. To save your report to resume working on later, click on the 'Save as Draft' button at the bottom of the page. Please make sure the '5. Report Type:' is correctly populated with the report type to which you want to submit your report. If you have not submitted your progress report (midpoint of the project), the Portal only allows you to submit a progress report.

Figure 5. Reporting Portal to save reports.

3.4 Submitting a Report

If you have any saved report with the proposal ID, you can edit your report and submit it only by clicking 'Edit' button on the 'Saved Report. If you see the 'Edit' button on the 'Funded Project List' grayed out, you may find your saved report from the 'Saved Report' below instead.

All fields are required to submit a report to be reviewed by the program manager. Once every entry is filled out, the 'Submit' button below the reporting form will be automatically activated. If you see this button grayed out, this means that one or more questions have to be answered.

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Figure 6. Reporting Portal to submit reports.

Quick Sheet for Reporting

1. When signing in for the first time, please make sure you sign in with your MSU email address. 'Switch account' if needed and click 'Allow'. **If not working**, please try one more time in **incognito mode** on the browser (private window in Safari if you are a Mac user).
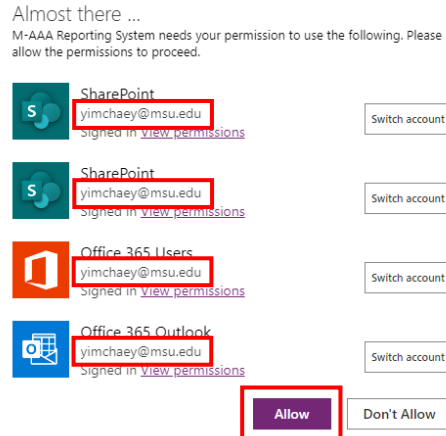
2. Check the due dates and report status in the table of 'Your Project Due Information.' Your report is being reviewed if 'Report Status' (it is for the mid-point report) or 'Final Report Status' (it is for the final report) indicates 'Pending'. If empty, you need to submit your report by the stated due date.
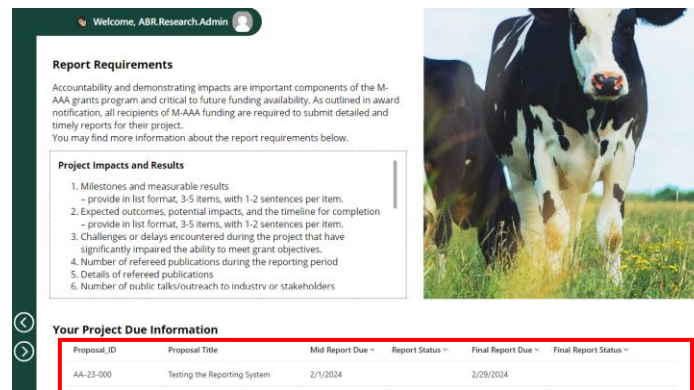
3. If you have a due report and cannot click the 'Edit' button on the list to create a new report for a proposal ID, it means you already have a saved report for this proposal ID. You can find the saved version for this project in the list of 'Saved Report.'