

# Explanation of User Roles and Capabilities in REEport

## Partner Sites

### 1. Site Administrator

- a. Has full control.
- b. Can view all projects and forms.
- c. Can create and make edits to any forms in Draft.
- d. Able to submit any form to NIFA.
- e. Access to complete and submit REEport Financial Report.
- f. Only role that can complete and submit the Program of Research.
- g. This is the only role that can delete projects.
- h. Only role that has access to Site Administration functions, such as adding users, setting form workflows, etc. In other words, control over all aspects of site configuration.

### 2. Assistant Site Administrator

- a. Can view all projects and forms.
- b. Can create and make edits to any forms in Draft.
- c. Cannot submit forms to NIFA.

### 3. Admin Support

- a. Intended as a data entry role.
- b. Can initiate new Capacity Project Initiation forms.
- c. Can view and make edits only on those forms which they initiated.
- d. Cannot submit forms to NIFA.

### 4. Project Director

- a. Exactly the same as Admin Support with three exceptions:
  - i. They can view and make edits on any forms for which they are the named PD, whether they initiated the form or not.
  - ii. They can submit forms to NIFA, but ONLY if the Site Administrator has set the workflows to allow it.
  - iii. A user must have this role in order to be assigned as the Project Director on any Capacity Project.

### 5. Reviewer

- a. Can view all projects and forms, but in a read-only state as a PDF.
- b. Has no other capabilities.

**6. Financial Administrator**

- a. Has access only to the Financial Report module.
- b. Able to complete the REEport Financial Report.
- c. Able to submit the REEport Financial Report, ONLY if the Site Administrator has set the workflows to allow it.

**7. AOR – Authorized Organizational Representative**

- a. This role was created for Non-Partner sites, but when used in Partner sites, effectively functions as the Admin Support role.

## **Non-Partner Sites**

**1. Project Director**

- a. Role is automatically assigned to the user who is named as the Project Director on a Competitive grant application.
- b. Allows user to view and edit only the projects and forms on which they are the named Project Director.
- c. Able to submit all forms.

**2. Reviewer**

- a. Role is automatically assigned to the user who is named as the Authorized Organizational Representative on a Competitive grant application.
- b. Allows user to view all projects for that organization as read-only PDF files.

**3. AOR – Authorized Organizational Representative**

- a. Role is automatically assigned to the user who is named as the Authorized Organizational Representative on a Competitive grant application.
- b. Allows user to edit only the projects and forms on which they are the named AOR.
- c. Able to submit all forms.

**4. Project Financial Reporter**

- a. Role is automatically assigned to both the Project Director and the AOR on a Competitive grant application.
- b. Allows the user to complete and submit the REEport Financial Report.