

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.