

User Guide for the National Information Management Support System (NIMSS)

Last update: 1/25/2021; 1/10/2020, cmh



Contents

General User Activities.....	4
Updating Your Personal Information (Name, email, station, etc.)	4
How to View Project/Proposal Materials from the Public Page.....	4
Viewing the project/proposal outline	4
Viewing Reports, Meetings, Impact Statements, Participants, and Reviews	4
Logging into NIMSS	4
Registering a New NIMSS User	4
How to View Project/Proposal Materials After Logging In.....	5
Viewing Active Projects.....	5
Viewing Proposals (not yet approved or active)	5
Requesting to Write a New Proposal	5
Typing/Uploading Your Proposal Text.....	6
Entering Appendix E/Project Participation Forms.....	6
Who Enters Appendix E Information?	6
Entering the Appendix E form.....	7
Submitting an Annual Report.....	7
Contacting Project Participants.....	8
Administrative Advisor Activities (AA)	9
Meetings and Reports.....	9
Authorizing an Annual Meeting	9
Submitting an Annual Report.....	9
Approving an Annual Report.....	9
Assigning Editors to Projects and/or Proposals.....	10
Inviting Participants to Proposals/Projects	10
Approving Submitted Proposals.....	10
Completing Your Assigned Proposal/Project Review	11
Station Director/Station Administrator Activities	12
Adding a New NIMSS User for Your Station	12
Submitting Project Participation Forms/Appendix Es for Your Station	12
Approving or Rejecting User Submitted Appendix Es for Your Station	12
Editing Existing Appendix Es for Your Station	12

Removing Existing Appendix Es for Your Station.....	12
Viewing Participants for Your Station	13
Updating Station Information	13
Regional System Administrator Additional Functions and Tips (for RSA level access only).....	14
Adding a New Station	14
Adding a New NIMSS User (RSA function ONLY).....	14
Duplicate Users and How to Handle Them	14
Editing Station Information and Directors	14
Updating User Profiles/Passwords.....	15
What to Do When a User Changes Stations.....	15
Submitting AppEs for Users or on Behalf of a Station Director/Station Admin:.....	15
Editing Existing AppEs	15
Contacting Regional Administrative Advisors	15
Approving a Request to Write a Proposal	16
Moving Regional Proposals Through the Approval Process	16
Assigning Reviewers to Projects and Proposals	17
Important Notes on Reviews:	17
For projects/proposals currently scheduled up for review/midterm (year 3 review)	17
To assign reviews to projects not in the scheduled review cycle:	17
Changing or Adding AAs on Active Projects	17
Changing or Adding AAs on Proposals	18
Entering/Approving AppEs for non-LGU Participants	18
Fixing Users Who Show Up in Directory, But Not Under AppE or Assign a Reviewer Selection	18
Finding Projects Missing Annual Reports	18
Deleting an Authorized Meeting	19
Editing an Authorized Meeting	19
Terminating Projects	19

General User Activities

Updating Your Personal Information (Name, email, station, etc.)

Only RSAs can do this now. Please contact the RSA for your region:

https://www.nimss.org/directory/regional_offices

How to View Project/Proposal Materials from the Public Page

Viewing the project/proposal outline

1. Enter the project or proposal number or a keyword into the Search NIMSS box
2. Click View next to the appropriate project
3. Navigate to individual sections using the links on the left

Viewing Reports, Meetings, Impact Statements, Participants, and Reviews

1. Enter the project or proposal number or a keyword into the Search NIMSS box
2. Click View next to the appropriate project
3. Click Homepage on the left
4. Click the appropriate button Reports, Meetings, Impact Statements, Participants, or Reviews

Logging into NIMSS

1. Go to www.nimss.org
2. Log in with your email address and password.
3. **All users must reset their password before accessing the new NIMSS for the first time.** To reset your password, select "Forgot Password?" from the top of the page. Follow the instructions exactly, setting your password with:
 - a. one lower case letter
 - b. one capital letter
 - c. one number
 - d. between 4 and 12 characters.
4. Use your new password and email address to log in. **Your email address is now your username; your old NIMSS username is no longer valid.**
5. If the system cannot find you, contact your regional system administration:
www.nimss.org/directory/regional_offices

Registering a New NIMSS User

1. All new NIMSS users must contact their AES office, if they have one, prior to applying for a NIMSS user account. Their AES office will let the regional system administrator know that the person is a legitimate member. Non-AES individuals can register with their regional system administrator: www.nimss.org/directory/regional_offices
2. Please send them your full name, email address, and station/company/institution name or click on the "New User?" at www.nimss.org. This function sends the request to the respective RSA, who will then make sure you are not already in NIMSS.

3. Your system admin will then add you to the system and send your password. Your email address is your username.

How to View Project/Proposal Materials After Logging In

Viewing Active Projects

1. Log into NIMSS at www.nimss.org
2. Select Projects and either View All Projects or Project Search. Each function will allow you to search by number or keyword. Project Search allows for a more detailed drilldown into project years, subject code, etc.

Viewing Proposals (not yet approved or active)

1. Log into NIMSS at www.nimss.org
2. Select Project Proposals
3. Select View All Project Proposals
4. Use the tabs to sort by region

Requesting to Write a New Proposal

1. Always contact your RSA prior to beginning a new/renewal proposal. Each region has different requirements and deadlines that you need to be aware of.
www.nimss.org/directory/regional_offices
2. Login into NIMSS at www.nimss.org. If you haven't logged into the new NIMSS yet (effective 12/14/2015), use your email address to reset your password under Forgot Password. Going forward, use your email address as your username and new password to log in.
3. Select Project Proposals >> Create New Proposal.
4. On the Basic Information page, select New only if the project is NOT a renewal of an existing project. Select Revision/Replacement if you are renewing an existing multistate project (most common).
5. **IMPORTANT: Be sure to select the expiring project number that this renewal will replace. Failure to do this will lead to NIFA reporting project initiation issues for your station!**
6. Only for brand NEW proposals: Choose the correct Appendix from the second pull-down menu:
 - a. Research proposals (NC, W, NE, S-type)- Choose Appendix A (Includes a Methods section)
 - b. CC, ERA, or DC proposals – Choose Appendix B (Includes an Activities and Procedures section in place of a Methods section)
 - c. 500-series proposals (Rapid Response Committees) - Use Appendix F (Does not include a Methods Section, but does include a section to list the types of project activities expected, requires prior regional office approval. Please contact your regional office prior to starting a new 500-series proposal request.
 - d. NRSPs, select NRSP from the dropdown
 - e. Only for New projects: Type in the desired project title and enter the five year begin and end dates.

7. For all proposal requests, new and renewal: Enter the Issues and Justification in the text box then click Save and Submit to submit the request as final to your regional office. Your regional office will enter the selected AA name and assign the proposal a temp number to use throughout the uploading and review process. Once the proposal has been fully regionally approved, the temp designation will be removed.

Typing/Uploading Your Proposal Text

1. Anyone wishing to upload proposal or project materials in NIMSS needs to be granted editing access to the proposal. Please contact your AA or regional office (www.nimss.org/directory/regional_offices) to be granted editing access to a proposal or active project.
2. To begin uploading and editing a proposal, log into NIMSS and under Action Items, select My Project Proposals. You'll see several tabs here. To add and edit text, your proposal request needs to have first been RSA approved before it will appear in your Draft Proposals tab and be available for editing. If it is and you have editor access (assigned either by the AA or your RSA), then click Edit to access proposal sections.
3. After clicking the Edit button, you can navigate between sections via the links on the left. **Be sure to save between each section!**
4. Formatting Tips: We recommend you paste sections in as text, then use the text formatting options to add bold, underline, etc. Alternatively, you can paste directly from MS Word, but you may need to do a little extra editing to take out extra line breaks, etc. Be sure to click on the View Project occasionally to check formatting and edit sections as needed (don't forget to save between sections!)
5. Figures, charts, and graphs may be attached to proposals using the "Attachments" link on the left side of the screen.
6. When you have uploaded all sections and you are ready to Submit as Final, go to the Basic (title, dates, advisors) section of the proposal and click the Submit as Final button. This action sends a notice to your regional system admin and AA informing them that the proposal is ready for review.

Entering Appendix E/Project Participation Forms

Who Enters Appendix E Information?

- Land-Grant University participants with Experiment Station or Extension (AES or EXT)
Appointments: We recommend you contact your Station Director's office before completing an Appendix E form in NIMSS, since stations often have different procedures for adding participants. Once you are ready to submit the form, follow the instructions below.
- Non-AES/EXT participants (ARS, Industry, other university, etc.): Please complete the AppE form as described below and/or contact the regional NIMSS system admin for the project (http://www.nimss.org/directory/regional_offices).

Entering the Appendix E form

1. Go to the National Information Management Support System at <http://www.nimss.org> and log in with your email address and password.
2. Once you have signed into the system, choose Participants >> Draft/Edit Participant Info >> Draft New
3. Enter the project/proposal number. For a new/renewing proposal (not yet approved), be sure to use the correct "temp" designation for the proposal. For active projects, enter the approved project number.
4. If you are the official station representative click on box (if not, leave blank)
5. Enter your percentages for Scientific Year, Professional Year, or Technical year as values < 1.0, where 1.0 = 100%.
 - a. SY: "Scientist Year" – FTE (entered as a decimal less than 1) for Assistant Professors, Assistant Scientist and above. This is for the PI on the AppE form and should not be more than 1.
 - b. PY: "Professional Year" – FTE for persons who hold positions in professional categories and students that hold bachelors or masters degrees. Can be greater than 1, if the PI has several post-docs or graduate students on the project.
 - c. TY: "Technical Year" – FTE for technicians, aids, and lab assistants. Can also be more than 1, if the PI has multiple technicians, etc. working on the project.
 - d. If you don't know, please enter 0.1 in the SY field
 - e. Enter your KA, SOI, and FOS codes. If you don't know them, you can look them up by clicking the title/link above each box. You must put a value in each box (i.e. if you have a KA, you must also have a SOI and FOS value or NIMSS will give you an error message)
 - f. If you have an Extension appointment, you should also enter your FTE (full time equivalent, as a percentage < 1.0, where 1.0 = 100%) and KA codes.
 - g. Finish by selecting "Submit." This sends the Appendix E to your Station Director for approval and then NIFA that the participant needs final approval.
6. **Note to SDs:** Users already listed on a project AppE cannot be added twice and NIMSS will display an error message letting you know that that user is already on the project. If the user is listed on the project with another station, contact your RSA to update the user to the correct station and then remove the old AppE. Once that's complete, you'll be able to add the user for your station.
7. **Note to SDs:** Research AppEs are now automatically marked as NIFA approved when approved at the SD level, provided data is entered for Research FTE (at least 0.1 SY), at least one Objective is selected, and one complete row of KA, SOI, and FOS are added. NIFA will reject users whose AppEs are missing the required information. If your user is rejected, contact your RSA for assistance with editing the rejected AppE or re-submit a new one.

Submitting an Annual Report

1. Sign into NIMSS at www.nimss.org. If you can't remember your password, select "Forgot Password" and follow the instructions. If the system doesn't recognize your email or if you've changed stations, please contact your regional NIMSS system admin for assistance.

2. Once you've signed in, go to **Reports/Meetings » Draft/Edit Report**. If you are authorized to submit the report on your committee's behalf as the AA or project editor, the project should come up for you automatically. If it does not, contact your project AA or your regional NIMSS system admin to be given the appropriate editing access. Click the "new report" or "edit report" button to submit the annual report (SAES-422).
3. Use the links on the left side of the screen to edit the report by sections. Start with the Basic Info section and update the report date and designate if the report is a termination one or not. If the minutes are part of the annual report, you may use the "minutes" link to post the brief summary of the minutes as well as the file (using the "browse" button to search for the file on your computer, but be sure the file is .pdf to avoid any viewing errors. NIMSS displays .pdfs the best over all other formats). Be sure to click the Save button before moving to a new section.
4. When you're done, click the "submit report" link. Check over the report to make sure everything looks correct. If not, go back and correct the sections, save, then submit again. This will send notification to the AA that is ready for approval. If you are the AA, then the report is immediately marked as approved upon submission.
5. If you need to edit an approved report, contact your NIMSS RSA for help. They are able to return reports to Draft status.

Contacting Project Participants

1. Log into NIMSS.
2. Select Directory >> Contact Participants or from the project homepage, go to Participants and click the Contact Participants button.
3. Begin entering the project number or title, then click on the correct one when it appears in the selection box and hit Enter.
4. You can contact the participants of several projects here, just repeat step 3 in the next box for the second project, and so on for additional ones. Give the system a second to load the project contact data.
5. Select the recipients or choose "Check All"
6. Add any cc email addresses, if needed. Be sure these email addresses are correct or you may encounter an error message
7. Enter the message title and body text
8. Add any attachments, as needed
9. Click Send when you are ready to send the message

Administrative Advisor Activities (AA)

Meetings and Reports

All multistate project meetings must be authorized in the NIMSS by the project AA or their designate.

All multistate projects are required to meet annually and submit an annual report via NIMSS within 60 days of the meeting. If reports for any past meetings are missing or not AA approved, the system will not allow a new meeting to be authorized.

Authorizing an Annual Meeting

1. Log into NIMSS at www.nimss.org.
2. Select Reports/Meetings >> Meetings >> Authorize an Annual Meeting.
3. Enter all of the meeting information into the Meeting Authorization form.
4. Click the Create Meeting button, down on the lower right side of your page.
5. If you need to make any changes, contact your regional NIMSS system admin (http://www.nimss.org/directory/regional_offices)

Submitting an Annual Report

1. Sign into NIMSS at www.nimss.org. If you can't remember your password, select "Forgot Password" and follow the instructions. If the system doesn't recognize your email or if you've changed stations, please contact your regional NIMSS system admin for assistance.
2. Once you've signed in, go to **Reports/Meetings » Draft/Edit Report**. If you are authorized to submit the report on your committee's behalf as the AA or project editor, the project should come up for you automatically. If it does not, contact your project AA or you regional NIMSS system admin to be given the appropriate editing access. Click the "new report" or "edit report" button to submit the annual report (SAES-422).
3. Use the links on the left side of the screen to edit the report by sections. Start with the Basic Info section and update the report date and designate if the report is a termination one or not. If the minutes are part of the annual report, you may use the "minutes" link to post the brief summary of the minutes as well as the file (using the "browse" button to search for the file on your computer, but be sure the file is .pdf to avoid any viewing errors. NIMSS displays .pdfs the best over all other formats). Be sure to click the Save button before moving to a new section.
4. When you're done, click the "submit report" link. Check over the report to make sure everything looks correct. If not, go back and correct the sections, save, then submit again. This will send notification to the AA that is ready for approval. If you are the AA, then the report is immediately marked as approved.
5. If you need to edit an approved report, contact your NIMSS RSA for help. They are able to return reports to Draft status.

Approving an Annual Report

When one of your project editors submits a report, NIMSS will send you an email notification. As AA, it's your responsibility to look over the report, make sure it meets the requirements, then approve it.

1. Log into NIMSS (www.nimss.org)

2. Go to Meetings/Reports, then Reports
3. Select Approve Report
4. To view this report, click View Report under the report date. Make sure the report is complete, follows the Appendix D format, and is multistate in nature, featuring collaborative accomplishments and impacts. Lists of only individual station reports are not acceptable.
5. To approve this report, click Approve

Assigning Editors to Projects and/or Proposals

Proposal/project editors have access to upload proposal materials and annual reports.

1. As of 1/25/2021, this function is not working correctly for AAs. Please contact your RSA for assistance assigning project editors.
2. Log into NIMSS and select Projects Proposals >> View All.
3. Search for the desired proposal number; be sure to include the "temp" designation.
4. Click View, click into the Outline, then click on Assign Editors (near the bottom, on the left)
5. Click Add Editor and begin entering the name of the desired editor into the box. Their full name should appear if they are in NIMSS.
6. To add more, click Add Editor button
7. Click Save when done.

Inviting Participants to Proposals/Projects

1. Proposals need to be set to Draft Proposal status before participants can be invited. This function will not work if the proposal is set to Under Review. Approved projects must be active and not expired/terminated.
2. Log into the NIMSS, www.nimss.org
3. Under Participants on the left-side menu bar, select Invite Participants
4. Enter the project or proposal number in the search box in the upper left corner and click Filter
5. Click Invite Users next to the proposal of interest
6. Enter the number/ID of the previous project (so those participants also get this email invite)
7. Set the due date for submission of Appendix E forms
8. Click Send Invite

Approving Submitted Proposals

As an AA, your committee will upload material for their renewal proposal, then submit it for you to approve.

1. You can find these proposals after logging in under Action Items, and then click My Project Proposals.
2. Please review the proposal material in the outline, then click AA Approve.
3. You can approve proposals either before or after you complete the AA review, assigned to you by your RSA. Approving proposals and completing the review are two separate tasks.

Completing Your Assigned Proposal/Project Review

1. Your RSA will assign you a review form to complete in NIMSS. This will either be a midterm review of an active project or a review of a submitted new/renewal proposal. You will receive an email notice when this form has been assigned.
2. For midterm reviews, you'll want to conduct your review based on the original proposal and the projects annual reports.
 - a. To view the active project and reports, log into NIMSS and select Projects >> Project Search and search for your project, then click View to access the project page.
 - b. Click Reports to view available reports
3. For new/renewal proposals, review the proposal text in the outline.
 - a. Find the proposal by logging into NIMSS and selecting Project Proposals >> View All, select the appropriate regional tab for the proposal. Be sure to include the "temp" designation with the proposal number.
 - b. When you locate the proposal, click on the proposal number link to access the full text outline.
 - c. If you wish to view any other submitted reviews for this proposal, click on Project Homepage, then click on Reviews.

Station Director/Station Administrator Activities

Adding a New NIMSS User for Your Station

If you need to add a new user, you now need to contact your RSA (http://www.nimss.org/directory/regional_offices). Only RSAs can add new NIMSS users to avoid duplicate user entries. Be sure to specify the user's station (AES, EXT, Other). Only AES-listed participants are eligible for Hatch Multistate funds.

Submitting Project Participation Forms/Appendix Es for Your Station

1. Log into NIMSS
2. Select Participants >> Draft/Edit Participant Info >> Draft New
3. Fill out the AppE form (be sure you've selected the correct project or proposal number. Proposals often have a "temp" designation in the number) and click submit
4. If you need to make any immediate changes, **DO NOT click your browser's back button**; this will result in a duplicate AppE! Instead, click the Edit button on the submitted AppE (it should still appear on your screen)
5. Please be aware that for NIFA approval, all AppEs for LGU AES participants must include:
 - a. At least one Objective selected
 - b. A number in at least SY, PY, or TY (should be less than or equal to 1, no greater)
 - c. At least one complete row of KA, SOI, and FOS values

Approving or Rejecting User Submitted Appendix Es for Your Station

1. Log into NIMSS
2. Under Status Reports on the main page, click on your Participants Awaiting Approval link
3. Click Approve as SD to approve the AppE
4. If you need to edit the AppE first, click Edit, make your changes, then click Submit
5. If you wish to reject the AppE, click Reject and enter a reason in the text box.
6. Rejected AppEs then appear for the user in their Participants >> In Process menu. Be sure to let them know to look there or contact your RSA for assistance.

Editing Existing Appendix Es for Your Station

1. Log into NIMSS
2. Select Participants >> Draft/Edit, then click on the Edit Participants link for your station
3. Edit the form, then click Submit
4. Note: If you need to change the project/proposal number on an AppE, please enter a brand new AppE for the project. Do not edit project numbers of existing AppEs, or the appropriate approval emails will not be sent.

Removing Existing Appendix Es for Your Station

1. Log into NIMSS
2. Select Participants >> Draft/Edit, then click on the Edit link for your station
3. Click Remove and confirm the removal when prompted

Viewing Participants for Your Station

1. Log into NIMSS
2. Select Participants, then choose the manner in which you wish to view (by station, project, etc.)
3. Many of these views also offer a Non-Paginated/View All and/or a print .pdf option.
4. You can view and activate/deactivate all users for your station via Directory >> Stations, search for your station, then click List of Station Users. This function is useful when a user retires or passes away.

Updating Station Information

Only your RSA can update your station listing now, such as adding or changing your Station Director, updating your website, etc. Please contact your RSA for help with this:

http://www.nimss.org/directory/regional_offices

Regional System Administrator Additional Functions and Tips (for RSA level access only)

Adding a New Station

1. Log into NIMSS
2. Select Directory >> Stations and **always** search for the desired station first to make sure it's not already in the database.
3. If you don't find it, then select Directory >> Stations, then click the Add Station button
4. Enter all the station information, then click Create Station

Adding a New NIMSS User (RSA function ONLY)

1. Log into NIMSS
2. Select Directory >> Users and **always** search thoroughly for the user, by both first and last name, to be sure they aren't already in NIMSS. If you find them, click Edit and update their email address and station, if needed. You may also need to Activate the user, if they are listed as Deactivated
3. If you do not find the user, then select Administration >> Create New User
4. Enter their name, email address, and then search/select the appropriate station (if you cannot find their station, you may need to create it first. Follow the instructions above for Adding a New Station)
5. Click Submit when done
6. If you get an error that the email address is already in use, you'll need to search again for the user by the email address, and then update the user profile accordingly. NIMSS does not allow the same email address in the database more than once.

Duplicate Users and How to Handle Them

1. Decide which account to keep, usually the one associated with the most active projects. If the account you wish to deactivate is also associated with projects, remove these AppEs, then re-submit new AppEs using the correct user account.
2. If you encounter a user with two accounts at the same station and the email addresses need to be the same, change email address for the account you wish to deactivate to a fake email address that follows standard email convention, i.e. [UserName@null.edu](#). This will allow you to now update the active account with the correct email address. In NIMSS, email addresses are used as the primary key for users, so two accounts cannot have the same email address.

Editing Station Information and Directors

1. Select Directory >> Stations
2. Search for the station, then click Edit
3. Use the tabs to access the desired station information you wish to update
4. To change the Station Director, clear the existing SD name in the box, then begin typing the new name (be sure this new SD is a user in NIMSS and has the correct station listing in their profile)

5. To change Associate Directors or Other SD affiliates, click Add or Remove to update these fields.
6. Click Save when done

Updating User Profiles/Passwords

1. Available under Directory >> Users, then click Edit. Change the desired info, then click Save
2. If you try to change a user's email address but NIMSS won't allow it because the email is already in the system, follow the instructions above under Duplicate User and How to Handle
3. When updating a user's password, please encourage them to use the Forgot Password function on the main NIMSS login page at www.nimss.org before updating this information for them.
4. If you do decide to set another user's password, make sure the password meets the NIMSS security requirements:
 - one lower case letter
 - one capital letter
 - one number
 - between 4 and 12 characters

What to Do When a User Changes Stations

1. Please Remove their AppE from the project for the old station, under Participants >> Draft/Edit >> Edit All. Search by Project or Station, are the best options.
2. Under Directory >> Users, update their email address and station
3. Submit a new AppE for their new station or have their SD do this.

Submitting AppEs for Users or on Behalf of a Station Director/Station Admin:

1. Select Participants >> Draft/Edit >> Draft New
2. Choose the project and participant
3. For AES participants, NIFA requires that at least one Objective be selected, Research Time must be entered into at least field, and one full line of KA/FOS/SOI codes be selected. If not, NIFA will reject the AppE
4. If you complete an AppE on behalf of a SD, be sure that you select Approve by SD from the dropdown inside the AppE form.
5. If you complete an AppE for a user, you can either leave the status as Submitted, which will route the form to the SD for approval, or select SD Approved to route it for NIFA approval (if applicable)

Editing Existing AppEs

1. Select Participants >> Edit All
2. Search by project, participant, etc.
3. Edit the AppE, then Save
4. Note: If you need to change the project/proposal number on an AppE, please enter a brand new AppE for the project. Do not edit project numbers of existing AppEs, or the appropriate approval emails will not be sent.

Contacting Regional Administrative Advisors

1. Select Directory
2. Contact Admin Advisors

3. Choose the region, then click Submit Query
4. Use the check boxes to select recipients
5. Write your message, adding an attachment, if needed
6. Click Send when ready

Approving a Request to Write a Proposal

1. To begin the proposal process, your users should select Project Proposals >> New Project Proposal. Once they enter the Basic Info and an Issues and Justifications, they can submit to you for RSA approval (this is equivalent to the Request to Write process in the legacy NIMSS)
2. Once they submit this initial request, you can find it under your My Project Proposals >> Pending RSA Approval tab.
3. Click the Edit button, then click Outline, then go to the Basic page
4. Assign an AA, editors, and give the proposal a temp number and approve it to the next level. This action approves the request and places it into Draft status.
5. Let the proposal AA and editors know that the proposal is ready to receive the rest of the text and that they can find it in NIMSS under their My Project Proposals in RSA Approved.
6. **Be sure to keep your proposal tabs clean of extra or unwanted proposals.** These can be deleted when in the Draft Request tab only, so you may need to reject requests first to move them back, then delete. Too many proposals that aren't being used can cause confusion and may incorrectly show up in searches.

Moving Regional Proposals Through the Approval Process

1. From the Dashboard, under Action Items, select My Project Proposals
2. Find the proposal you wish to work with, then click Edit
3. Click Outline, then on the Basic page, update the proposal status level under Status
4. To approve a proposal as Regionally Approved, thus sending it to NIFA for approval (if a research, NRSP, or 500 series), then be sure to click the Approve Proposal button under Basic to send the appropriate notifications out.

Important! Before approving proposals:

- Make sure all proposals number designations have been changed to their final, active project number before approving!
- Before approving proposals, you may wish to first make sure everyone on the project who should be "Active" in NIMSS has been activated, since only active users receive project-related emails. You can do this under Directory >> Contact Participants. Inactive users will be highlighted. To activate them, search for them under Directory >> Users, then click Activate. When data from the legacy NIMSS was transferred over and duplicate accounts were combined, some user accounts were deactivated to facilitate this process.

Assigning Reviewers to Projects and Proposals

Important Notes on Reviews:

- Reviewer names are kept anonymous throughout the system and in all emails, with exception of the Review Assigned and Reminder emails, which goes only to the RSA and the assigned Reviewer, and Assign a Reviewer, available only to RSAs. You can add a note in the Note box to indicate whether these reviews are AA, peer, AC, etc. This is often very helpful when AAs and others go to view the completed project reviews.
- My Reviews shows only reviews that have been assigned to YOU.
- View Reviews only shows anonymous, completed reviews.

For projects/proposals currently scheduled up for review/midterm (year 3 review)

1. Select Reviews >> Assign a Reviewer
2. Search for the project (only RSA approved proposal requests and projects up for midterm review will be searchable to assign a review on this screen)
3. Click on the appropriate review form
4. Enter the name of the reviewer and click on it when it appears. If their name doesn't appear, they may need to be added to NIMSS if a new user. If they are in the user directory, then deactivate and re-activate them again. This should allow their name to appear for you.
5. Enter the review due date
6. Click Submit

To assign reviews to projects not in the scheduled review cycle:

1. Select Reviews >> Assign a Reviewer
2. Click on the All Active Projects link under Sort by Region
3. Search for the project
4. Click on the appropriate review form
7. Enter the name of the reviewer and click on it when it appears. If their name doesn't appear, they may need to be added to NIMSS if a new user. If they are in the user directory, then deactivate and re-activate them again. This should allow their name to appear for you.
5. Enter the review due date
6. Click Submit

Changing or Adding AAs on Active Projects

1. Select Projects >> Project Search and bring up the desired project or proposal
2. Click View
3. Click Outline
4. Click Basic (title, dates, advisors) from the Project Menu
5. Click Remove to add the existing AA
6. Click Add Administrative Advisor and then search for the user you want. The user must have an active NIMSS account, or they will not appear in your search.

Changing or Adding AAs on Proposals

1. Select Project Proposals >> Search for Proposal and locate the desired proposal. If searching by number, don't forget the "temp" designation, if applicable (i.e. NC_temp170)
2. Click View
3. Click Outline
4. Click Basic (title, dates, advisors) from the Project Menu
5. Click Remove to add the existing AA.

Entering/Approving AppEs for non-LGU Participants

1. All non-LGU AppEs need to either be entered by or approved by the project's RSA now.
2. To enter a non-LGU AppE, first make sure this user is an active NIMSS user (add them and their station, as needed. See instructions above on how to add new stations/users to NIMSS)
3. Select Participants >> Draft/Edit Participant Info >> Draft New
4. Select the project/proposal
5. Select the User and complete as much of the AppE info as you can. Ideally, select at least one objective, enter SY as 0.1 and at least one full row of KA, SOI, and FOS.
6. Be sure to update the "Appendix E Status" to "Approved" to fully add this non-LGU user to the project. If you don't they will remain in the All Participants Pending Approval queue, since they do not have an SD to move the AppE forward.
7. If the non-LGU user completed their own AppE, you can approve this from Dashboard, then click on All Participants Pending Approval, then choose the project's regional tab. Edit the AppE and set the "Appendix E Status" to "Approved".

Fixing Users Who Show Up in Directory, But Not Under AppE or Assign a Reviewer Selection

1. Find the user via Directory >> Users
2. Click Deactivate, then Re-activate
3. This will reset them as an active NIMSS user and they should now appear for you in the AppE and Assign a Reviewer selections
4. If this doesn't work, you may need to contact the Clemson developers.

Finding Projects Missing Annual Reports

1. From the Dashboard, under Action Items, select Meetings with No Reports
2. Choose your region
3. Scroll down to list all projects that met but haven't submitted their annual reports
4. If it's been more than 60 days since the meeting, you may wish to remind the AA or committee that their report is overdue, although NIMSS now sends reminders to committee AAs and editors at 30, 60, and 90 days past the meeting.
5. **Note:** If a report is in the system, but not yet AA approved, it won't appear as a missing report. You'll need to list all reports (Reports >> Draft/Edit, search by project number) and check the status of each one.

Deleting an Authorized Meeting

1. This function is available only to RSAs (AAs can cancel a meeting only) within the Edit Authorization function for a meeting.
2. Canceling meetings defaults to sending emails to the system and project members, but deleting a meeting does not.
3. Select Reports/Meetings >> Search for a Meeting. Click on Edit Authorization for the meeting you wish to delete
4. Scroll to the bottom of the meeting page and click Delete.

Editing an Authorized Meeting

1. Select Reports/Meetings >> Search for a Meeting
2. Click Edit Authorization
3. Make any changes needed
4. **Click Save FIRST**, then Resend Emails, if you wish to resend the authorization. If you don't Save first, the changes will not be saved and re-sent emails will contain the old information.

Terminating Projects

1. NIMSS automatically terminates projects when they expire so they no longer show up in Active lists.
2. Select Projects >> Terminate a Project
3. Click the Terminate button from the left
4. Check or uncheck the send email box, as desired
5. Click Submit! to terminate the project
6. Special Tip: If for some reason you need to undo the Terminate status of the project, perhaps to send messages to the old committee, use Projects >> Project Search (be sure to toggle the status selector from Active to Inactive/Terminate) to find the project. Then, from inside the Basic page on the project's outline, change the status to Draft. Don't forget to Terminate the project again when you're done.