



## 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.

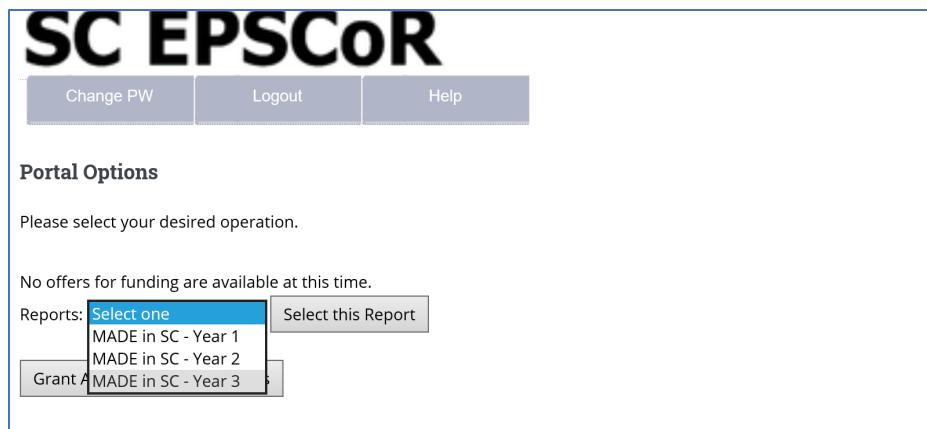


Figure 1. Report Selection Screen

## 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 or 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.

The screenshot shows the SC EPSCoR DATA ENTRY CONTROLS interface. At the top, there is a navigation bar with links for 'Portal', 'Change PW', 'Logout', and 'Help'. Below the navigation bar, there are two buttons: 'Review Your Demographics' and 'Please Provide Disability Information'. A section titled 'Reports' contains two buttons: 'View Additional Reports' and 'View My Report'. Under 'Data Entry Controls', a message says 'Please make selections to begin entering data or to review reports.' Below this, there are dropdown menus for 'Report' (set to 'MADE in SC - Year 3'), 'Year' (set to 'June 2, 2019 - June 1, 2020'), and 'Section'. A dropdown menu for 'Section' is open, showing options: 'Select one', 'Accomplishments', 'Products', 'Impact', 'Work Effort (Months)', 'Summary Comments/Changes/Problems', and 'Responsible Conduct of Research Certification'. At the bottom left, there is a link to 'View PDF of a Brief Proposal Submission Users Guide.' and another link to 'View PDF of a Brief Reporting Users Guide.' with a note about additional assistance.

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.

The screenshot shows the SC EPSCoR DATA ENTRY CONTROLS interface. At the top, there is a section titled 'Data Entry Controls' with a message 'Please make selections to begin entering data or to review reports.' Below this, there are dropdown menus for 'Report' (set to 'MADE in SC - Year 3'), 'Year' (set to 'June 2, 2019 - June 1, 2020'), and 'Section' (set to 'Accomplishments'). Below the section dropdown, there are buttons for 'Project' (with 'Select One' highlighted in blue), 'Add/Edit Project', and 'Form' (with 'Select one' in a dropdown menu). The background of the 'Section' dropdown is highlighted in blue.

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

After entering a project title, the user 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.

**Data Entry Controls**

Please make selections to begin entering data or to review reports.

Report: MADE in SC - Year 3 ▾ Year: June 2, 2019 - June 1, 2020 ▾ Section: Accomplishments ▾

Project: Crystal Ball ▾ Add/Edit Project Form: Select one

- Research Accomplishments
- Other Activities Completed this Period
- Work to be Done Next Reporting Period

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[View PDF of a Brief Reporting Users Guide.](#) For additional assistance, please submit a [Help Request](#).

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.

**Data Entry Controls**

Please make selections to begin entering data or to review reports.

Report: MADE in SC - Year 3 ▾ Year: June 2, 2019 - June 1, 2020 ▾ Section: Accomplishments ▾

Project: Crystal Ball ▾ Add/Edit Project Form: Research Accomplishments ▾

### Research Accomplishments

Upload a WORD document using the template file then press Record Data.

Select WORD file to upload:  [Browse...](#) [Download Template](#)

[Record Data](#) [Clear Form](#)

File NMA Project Accomplishments 1.docx has been loaded. Record has been saved.

[Edit/Delete](#) Project: Crystal Ball - 1.

File Loaded: [NMA Project Accomplishments 1.docx \(17KB\)](#)

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.

**Data Entry Controls**

Please make selections to begin entering data or to review reports.

Report: MADE in SC - Year 3 ✓ Year: June 2, 2019 - June 1, 2020 ✓ Section: Accomplishments ✓  
 Project: Crystal Ball ✓ Add/Edit Project Form: Other Activities Completed this Period ✓

**Other Activities Completed this Period**

For accomplishments related to Workforce Development, student research, teacher training, equipment purchases, hiring, etc., please enter the information in the text box, then click Record Data.

Activities:

Record Data    Clear Form

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.

**Data Entry Controls**

Please make selections to begin entering data or to review reports.

Report: MADE in SC - Year 3 ▾ Year: June 2, 2019 - June 1, 2020 ▾ Section: Products ▾  
 Project: Crystal Ball ▾ Add/Edit Project Form: Journal Publications ▾

### Journal Publications

List each article related to this project. After a record has been added, it will appear below the form. Click the Edit/Delete button next to a record to populate the form from which you may make change or delete the record. To add additional records, click the button titled, Clear Form. NSF requires journal articles be uploaded in PDF/A format. Click the link below to view conversion process.

[Conversion process from PDF to PDF/A.](#)

Year:	Select One ▾
Peer Review:	Select One ▾
Paper Title:	<input type="text"/>
Status:	Select One ▾
Journal Title:	<input type="text"/>
Volume:	<input type="text"/>
Number:	<input type="text"/>
From Page:	<input type="text"/>
To Page:	<input type="text"/>
DOI:	<input type="text"/>
Upload Published Article (PDF):	<input type="button" value="Browse..."/> <a href="#">Click here for Process to Convert PDF to PDF/A</a>
NSF Award #OIA-1655740 acknowledged:	Select One ▾
Goal Thrust:	Select One ▾

[Record Data](#) [Clear Form](#)

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.

**SC EPSCoR**

Help

## Add Team Members

Please identify team members from among the participants in this effort to support the annual report. If a team member is not in the select list, you may type in the name and click the button to add the name as a member of this activity. This information is requested to help identify activities that could be duplicated in the collection of information from all participants. The activity record will be shown among the activities listed for each participant identified as a team member, so that it will not be necessary for them to independently add the activity. When the team member list is complete, press the button titled, Continue, to return to the data collection form.

**Activity:**

Accomplishment Record: (2019). Intl Journal of Materials Design. *New Material Design Methodology*. 1(2), 40-45.  
Status = Accepted. NSF #OIA-1655740 Acknowledged = Yes, Goal Thrust = MCC. Peer Reviewed = Yes. DOI = .

Author:	Select one or type a name	First Name	Last Name	Add Author
<input type="button" value="Continue Data Entry"/>				
<input type="button" value="Delete"/>	Aziz, Nadim Sort Order (1-9)	<input type="button" value="Reorder This Member"/>		

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[View PDF of a Brief Reporting Users Guide.](#) For additional assistance, please submit a [Help Request](#).

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.

## Add Team Members

Please identify team members from among the participants in this effort to support the annual report. If a team member is not in the select list, you may type in the name and click the button to add the name as a member of this activity. This information is requested to help identify activities that could be duplicated in the collection of information from all participants. The activity record will be shown among the activities listed for each participant identified as a team member, so that it will not be necessary for them to independently add the activity. When the team member list is complete, press the button titled, Continue, to return to the data collection form.

### Activity:

Accomplishment Record: Advertise to recruit a graduate student to work on visualization modeling of new polymeric material interaction with cells.

Team Members:	<input type="button" value="Select one or type a name ▾"/>	<input type="text" value="First Name"/>	<input type="text" value="Last Name"/>	<input type="button" value="Add Team Members"/>
<input type="button" value="Continue Data Entry"/>				
<input type="button" value="Delete"/>	Leibniz, Jonathan Sort Order (1-9)1		<input type="button" value="Reorder This Member"/>	
<input type="button" value="Delete"/>	Modeler, Jane Sort Order (1-9)2		<input type="button" value="Reorder This Member"/>	

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

Notice the option to reorder the list of team members. To reorder 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 forms 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.

**Goal Attribution Controls**

Please select one or more goal activities that related to your entry. The full strategic plan of the Project is shown below. Select Division, Goal, Objective then activity to narrow the plan down to a single activity and then click the Record Goal Activity button. Repeat as appropriate. When done entering all relevant activities, click the button to continue with data entry.

Accomplishment Record: Advertise to recruit a graduate student to work on visualization modeling of new polymeric material interaction with cells.  
Team Members: Modeler, Jane; Leibniz, Jonathan;

Goal Activities Aligned with this Accomplishment:

Division:

1. Made in SC -  
 1. Thrust 1: Hierarchical Structures - Thrust Area 1: Hierarchical structures with controlled optical and magnetic properties  
 1. New Structures - GOAL 1: New structures with desired magnetic and optical properties prepared via crystal growth

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.

**SC EPSCoR**

**Goal Attribution Controls**

Please select one or two goal activities that are associated with this accomplishment. The full strategic plan is shown below. Select items in the select lists to narrow the plan down to a single activity and then click the button titled, Record Goal Activity. Recorded activities will appear below the accomplishment record. When you are done, click the button to continue with data entry.

Accomplishment Record:  
Team Member: Aziz, Nadim;

Goal Activities Aligned with this Accomplishment:

Plan:  Division:  Goals:  Objective:

1. MADE in SC - Year 3 -  
 1. Thrust 2: Polymeric Materials - Thrust Area 2: Stimuli-responsive polymeric materials  
 1. New Materials Functions - GOAL 2: Understand how internal or external stimuli can be used to control new materials functions  
 1. Develop Molecular Sensors - Objective 2.a: Develop molecular sensors and understanding their role in new materials  
 1. Molecular Sensors - Develop copolymer-based molecular sensors capable of responding to electromagnetic radiation  
 2. Understand Kinetics - Understand kinetics and its role on stimuli-responsiveness and self-assembly  
 3. Model Responses - Model dynamics of responses  
 2. Develop New Materials - Objective 2.b: Develop new stimuli-responsive classes of materials capable of sensing  
 1. Block Copolymer Micelles - Develop equilibrium descriptors and kinetic theory on block copolymer micelles  
 2. Test Polymers and Conditions - Test diverse polymers and exp. conditions for effects on structure, nanoparticle distribution, micelle kinetics  
 3. Theory Validation - Characterize structure and dynamics for theory validation

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.

The screenshot shows the 'Goal Attribution Controls' section of the SC EPSCoR system. It includes fields for 'Plan', 'Division', 'Goals', 'Objective', and 'Activity'. The 'Activity' dropdown is set to 'Select one' and contains three options: 'Block Copolymer Micelles', 'Test Polymers and Conditions', and 'Theory Validation'. Below this, a list of activities is displayed, starting with 'MADE in SC - Year 3 -' followed by a detailed list under 'Thrust 2: Polymeric Materials - Thrust Area 2: Stimuli-responsive polymeric materials'. At the bottom, there are links to PDF guides and a help request form.

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 to 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.