

# Easy NIMSS for AAs: Webinar Quick Training Guide

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*This guide is meant only to accompany the NCRA office new-AA quick training webinar. A more detailed NIMSS manual can be found here: [http://ncra.info/MSR\\_NIMSS\\_Manual.php](http://ncra.info/MSR_NIMSS_Manual.php)*

*See also our NCRA AA/Chair Virtual Handbook at [http://ncra.info/MSR\\_VirtualHandbook.php](http://ncra.info/MSR_VirtualHandbook.php)*

## Topics

Getting Started With NIMSS .....	2
Basic Searches.....	3
Contacting Committee Members.....	3
Authorizing meetings.....	3
Annual Reports (Also Known as SAES-422 forms) .....	4
Approving Participants.....	5
Removing Participants .....	6
Adding Participants/Completing Appendix E forms .....	6
Setting Up a Renewal Proposal.....	7
Inviting Participants to Join a Project.....	7
Completing, Submitting, and Viewing Reviews .....	7
Assigning Committee Officers.....	8

## Getting Started With NIMSS

### Registration

1. Are you registered?
  - a. Navigate to [http://lgu.umd.edu/lgu\\_v2/](http://lgu.umd.edu/lgu_v2/) and click on **Member Login and Registration**.
  - b. Click on the **Track ID** button and enter your email address. If it's not found, but you believe you are indeed registered, try an old email address. If you still can't find it, please call or email your AES office (for Land-Grant users) or the NCRA office (608-262-2349; [ncra@cals.wisc.edu](mailto:ncra@cals.wisc.edu)). Please do not register again; duplicates cause problems in the database.
  - c. If you've never registered, go to [http://lgu.umd.edu/lgu\\_v2/](http://lgu.umd.edu/lgu_v2/) and click on register. Enter your information and click **OK**. Write down the Login ID you select. Once your registration has been approved, you'll receive your password via email.
2. Editing your profile – use this option to update your email address, phone, number, and address
  - a. From the top menu bar, click on **Settings**
  - b. Click on the **Edit Profile** button
  - c. Make any changes needed, then click Update when done
  - d. Click on the picture of the NIMSS “trees” at the top left to return to the main page
3. **For directors and assistants only: Registering a new member of your AES**
  - a. *First, please use the Searching for People instructions below to make sure the individual is not already registered in the system. If they are, but are not listed in your station's user list, please contact the NCRA office for assistance*
  - b. *If the user is not listed in NIMSS, follow the instructions above under 1.c. to register the individual.*

### Your Main Page

#### The Scary “For Action !!”

It looks scary, but it's really not. The “For Action !!” banner lists items that are ready for you to take care of and provides alternative links to access each feature. All of these features are listed below. For instance, you may see “Approve Participants” or “Review to be Completed”. If so, you can either click on the link or just follow the instructions below for approving participants or submitting a review. The NCRA office will contact you with a friendly reminder if you forget or miss something, so don't panic.

#### Status Report

This section lists the status of your project's participants, projects, and reports. It's a quick way of checking up on things from time to time without having to go through all the menu options or doing a search.

## Basic Searches

There are two searches you are likely to use in NIMSS: One for projects, the other for people/users.

### *Searching for Projects*

1. From the top menu, mouse over **Projects**
2. Select **View Projects**, then **Search for Projects** (quick tip: you can also just do **Projects >> View Projects** and the **Search for Projects** page will open automatically)
3. This page will allow you to search projects by number, words in the title, expiration date, etc.

### *Searching for People*

1. Select **Directory** from the top menu
2. Select **Find a Person**. This opens the **Find a Person** page
3. Enter your search parameters
4. Click on the **Search for Person** button at the bottom

## Contacting Committee Members

This function allows you to easily send a message through NIMSS to all official members of a committee. This is especially useful for new AAs wanting to introduce themselves to a committee or for reminding members to submit reports, etc.

1. Mouse over the **Directory** menu option from the top bar
2. Select **Contact an Expert/Contact Participants**
3. Select **Contact Participants** from the next menu list
4. Select the project from the drop down list
5. Select the project members you wish to contact
6. Fill out the Subject and Message Text Boxes
7. Add an attachment if needed by clicking on the **Browse** button next to the attachment field (only one attachment is allowed per message)
8. Browse through your computer to find the file and upload it
9. Click **Send Email** to send the message

## Authorizing meetings

NC committees are expected to meet once a year, either in person or by teleconference. All meetings must be “authorized” in NIMSS to maintain a record of a committee’s activity. Also, authorizing a meeting then sets up a location in the NIMSS database within which the annual report can be placed; annual reports cannot be uploaded unless they are associated with an authorized meeting.

1. Collect the meeting date and location information from your committee's leadership or meeting host.
2. In NIMSS, mouse over the **Reports/Meetings** menu
3. Select the **Authorize an Annual Meeting** option
4. Fill out as many of the fields as possible on the **Create Meeting** form that opens up
5. Click **View Before Submit**
6. If it looks the way it should, click on the **Send Emails** button. This will send the meeting information out through the regional and national AES directors' lists.
7. Once it's been sent out, you cannot make any changes to the meeting information, but your NIMSS system admin can. Please contact [ncra@cals.wisc.edu](mailto:ncra@cals.wisc.edu) or call 608-262-2349 for assistance. Do not authorize the meeting again, this will cause problems in the NIMSS database.

### **Annual Reports (Also Known as SAES-422 forms)**

Annual reports must be submitted to NIMSS within 60 days after a meeting to meet NIFA reporting requirements. NIMSS will automatically send you reminders at 30, 60, and 90 days. If a committee does not submit their report, the NCRA office may cancel their next meeting. Also, a lack of annual reports may result in a poor review or even early termination of a project. We need these reports to prove to our stakeholders that our multistate projects are indeed active and working towards their goals and objectives.

*Please note: Committee members, not AAs, are ultimately responsible for completing annual reports, although a good AA will stay on top of the reports and remind the committee in advance.*

Procedures for uploading annual reports into NIMSS vary from committee to committee. Some committees will send their AA the completed report and the AA will upload the file into NIMSS. Others have committee members upload the reports themselves, but in this case, the person uploading needs to have editing access. As an AA, you can authorize this access easily in NIMSS:

#### **Assigning Editing Access to a Committee Member**

1. Select **Reports/Meetings >> Assign Editor**
2. Click on the **Assign Editor** button for the desired project.
3. When the **Assign Editor** page opens, click on the **Pick** button. Do not type the name in the text box, it won't work.
4. When the **Pick Editor** page opens, search for the member you wish to grant editing access to
5. Once you select them, their name should appear in the **Assign Editor** text box.
6. Click on the **Set** button to confirm

*\*Note: Sometimes, you may find two listings for the member you wish to select, which means there is a duplicate listing in the database that should be corrected. If this happens, please contact the NCRA office before granting editing access and we will fix the problem.*

### ***Approving an Uploaded Annual Report***

When a committee member with editing access uploads an annual report and clicks the **Submit to AA** button, NIMSS will send the AA a message notifying them that there is a report needing approval. You must approve this report before it will be submitted to the system as final.

1. Select **Reports/Meetings** from the top
2. Pick **Approve a Report**
3. Click on the **View Report** link under the report date to review the material. The report will open in a new browser tab
4. If it looks fine, navigate back to the **Approve a Report** tab in your browser and click on the Approve button.
5. If you don't like the report, rather than clicking on the reject button, I recommend you contact the committee directly to discuss any issues you have.

### ***Uploading a Report***

In some cases, a committee may send you the annual report for uploading, which you may do if you want. However, the NCRA recommends that the committee members do the bulk of the work for the project, including uploading the report. However, some AAs prefer to upload the report themselves. Here's how:

1. Select **Reports/Meetings**
2. Select **Draft/Edit Report**
3. Click on the **Edit Report** button next to the desired committee meeting date
4. Enter the report information, using the links in the gray box on the left to navigate between sections. Be sure to click **Save** before moving to a new section.
5. When the report is complete, click **Submit Report** from within the gray box. When an AA submits the report, it is submitted as final; there is no need to approve a report you submitted.

*If changes need to be made to a submitted report, please contact the NCRA office. We can place the report back into Draft status for editing. Once the changes are complete, the report will need to be re-submitted for approval.*

### **Approving Participants**

When participants are added to your project by their AES office, you will receive a notice from NIMSS that "Participants are Awaiting Approval". When you receive this message, try to approve them right away so that you don't forget. Approving participants is very simple:

1. Select **Participants >> Approve Participant**
2. Click on the **Approve as AA** button to approve

**Station director assistants:** You will also use this procedure to approve your institution's participants. Click on the **Approve as SD** button to approve their participation in the listed project.

## Removing Participants

Occasionally, you may need to remove a participant from a project, for whatever reason. All AES/Land-Grant Participants should go through their AES office to be removed; you do not have access to remove them. However, you do have access to remove non-AES/LGU participants if needed. This is also simple:

1. Select **Participants >> Remove Participants**
2. Click the **Remove** button under the participant and project desired

## Adding Participants/Completing Appendix E forms

Only authorized AES administrators can complete and approve Appendix E (participation) forms for Land Grant University (LGU) participants. However, as an AA, you can complete Appendix E forms for non-LGU participants, including ARS, industry, and others. If AES participants approach you about completing their Appendix E forms to join a project, tell them that they must contact their AES office. Here's how to complete an Appendix E form:

1. Make sure they are registered in NIMSS by doing a search under **Directory**. If they are not in the system, please put them in touch with the NCRA office. I will help and approve their registration.
2. Ask the participant which of your project's objectives they will be associated with
3. Ask them if they know their KA, SOI, and FOS codes (aka CRIS codes). If they do, great. If not, don't worry. This information is helpful but not mandatory for non-LGU participants. If you know their field of study, the NCRA office can help look up the appropriate codes.
4. Locate the person in NIMSS by searching under **Directory**. Write down their Station/Institution listing exactly as you see it (i.e. Christina Hamilton's is AES/NC/North Central Regional Assoc). You'll need this information to look them up when you're in the Appendix E form
5. Select **Participants >> Draft/Edit Participant Info >> Draft New**. This will open the online AppE form.
6. Select the project #. The title will fill in automatically. Make sure that if it's a renewing proposal, be sure to select the "temp" version, not the expiring project number.
7. Using the Station/Institution information you wrote down earlier, select the appropriate drop down options in the Station field. NIMSS needs to access a lot of data for these fields, so be sure and wait a few seconds for it to load after you've made each selection. If you've selected correctly, their name should appear in the Name drop down menu. If not, please contact the NCRA office. I have some tricks to find people if you cannot.
8. Select 0.1 as the default Research Commitment, unless you know otherwise
9. Enter the KA codes (if you have them) in the Research boxes
10. Do not enter anything in the Extension section; this is only for Extension participants.
11. Click **Submit** when done

## Setting Up a Renewal Proposal

As an AA, you serve as the liaison between the NCRA office and your committee members. Therefore, the NCRA office will send you all the project reminders, such as renewals and midterm review due dates, which you should, in turn, share with your committee. The committee members are expected to do the work; we just need you to make sure they know how to do it and when everything is due.

NC projects, in general, need to renew every five years. Renewal proposals are due in NIMSS one year prior to the project's expiration date to ensure sufficient time for review. This training will not go into detail regarding proposal renewal since detailed instructions and deadlines can be found on our website here: [http://www.ncra.info/MSR\\_ApprovalProcess.php](http://www.ncra.info/MSR_ApprovalProcess.php). Again, it is not the AA's job to upload the proposal. This is work that the committee members should complete. Be sure to give them editing access to the "temp" project, though! (See the Assigning Editing Access to a Committee Member above)

That said, everything for setting up the renewal can usually be found under the Projects menu option in NIMSS. Feel free to contact the NCRA office for assistance.

For further information on viewing and editing proposals and homepages, see [http://ncra.info/MSR\\_NIMSS\\_EditingProposalHelp.php](http://ncra.info/MSR_NIMSS_EditingProposalHelp.php)

## Inviting Participants to Join a Project

This step should only be done when a renewal proposal is being developed and after the Objectives section is uploaded. Here's how:

1. Select **Participants >> Invite Participants**
2. The official NIMSS participation invitation should appear on your screen
3. Scroll down to the "Cut-Off Date" box. Since the NC deadline for adding participants to a new/renewing project is November 15, I usually change this date to 11/15.
4. If you change the date, the page will re-load appearing to have sent the invite, but it actually has not. You'll need to click **Send** when done.
5. Click **Send** to send the invite to the national AES lists.
6. NIMSS will post a confirmation that the message was sent

## Completing, Submitting, and Viewing Reviews

You will be assigned an AA review form when your project is up for a midterm/year three review and after its renewal proposal has been submitted. It is important that you complete these forms. Even though we have several layers of reviews in the NCRA, you as AA work closest with the committee and can best describe whether or not they function successfully.

NIMSS will notify you when you have been assigned a review; please try to complete it as soon as possible so you don't forget. NIMSS only sends one notification.

To access and complete a review in NIMSS:

1. Select **Reviews** from the top menu, then **Submit a Review**
2. Complete the review form as best you can, paying attention to character limits.
3. Click on the **AA Review** or **AA Midterm Review** form button, depending upon the type of review.
4. Complete the review and be sure to click the **Submit** button to notify the NCRA office that the review is final
5. You can also view past reviews by clicking on one of the **View Review** buttons or selecting **Reviews >> View a Review** from the top menu bar

### Assigning Committee Officers

Although it's not done as often as we'd like, there is an official way in NIMSS to list and update your committee's officers, such as Chair, Vice-Chair, and Secretary. The NCRA recommends updating committee officer lists annually.

1. Select **Participants >> Officers >> Assign/Edit Committee**
2. Click on the **Assign** button next to the committee
3. Use the pull down menu to choose the appropriate member for each role
4. Click **Save** when done