New M-AAA Portal User Guide

The New M-AAA Portal
(Scan the QR code below to go to the portal.)

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1. Introduction

1.1 Purpose of the Document

This user guide provides comprehensive guidance and instructions on how to effectively use the newly designed proposal management system for M-AAA (The New M-AAA Portal), helping users understand the features and functionalities of the web application[1] or the "Portal" for short.

1.2 Key Features

The New M-AAA Portal consists of three different pages – PI Portal, Reviewer Portal, and Admin Portal, allowing users to use the Portal based on role: principal investigator (PI), reviewer, or M-AAA administrators. With this new portal, users can enter, save, and submit data and information before the deadline. It offers intuitive icons and visual cues for better portal navigation and user experience. Additionally, it provides real-time notifications every time PIs, reviewers, or M-AAA administrators save and submit a record into the system.

PI Portal	Reviewer Portal	Admin Portal
Allows PIs to create, read, update, submit, and delete proposals.	Allows reviewers to view assigned proposals and score based on review criteria.	Allows Administrators to view the complete list of submitted proposals and assign three reviewers per proposal along with the due date.

The portal supports a search function, and users can filter data based on status (saved vs. submitted for PIs).

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[1] This user guide uses the terms web application, App, and Portal interchangeably.

2. Getting Started

2.1 System Requirements

The New M-AAA Portal was designed and built using Microsoft's Power Apps application licensed by Michigan State University (MSU) and runs in the Microsoft cloud environment. The application leverages the capabilities and infrastructure provided by Microsoft, allowing users to access and use the App through compatible web browsers without having to download and install any additional hardware or software.

Hardware Requirement	Software Requirement
Users do not require specific hardware specifications beyond those necessary to access the internet and run a web browser, but they need to have an **active Office 365 account**[2].	The primary software requirement for using the App is a compatible and up-to-date web browser. It is recommended to use the **latest version** of one of the following browsers: 1) Microsoft Edge 2) Google Chrome 3) Mozilla Firefox 4) Safari

2.2 Accessing the Portal

(1) Web Browser:

• Open a preferred web browser. It is recommended to use the latest version of one of the following browsers: Microsoft Edge / Google Chrome / Mozilla Firefox / Safari
• Enter the URL (Link to the Portal).
• Log in using MSU NetID* if the browser did not auto-detect the user's credentials.
***Note**: This Portal requires multi-factor authentication required by MSU through OKTA, just follow the prompts to complete the verification.

* For non-MSU users, please wait to access the App after MSU IT sets up user credentials. The grant administrator will contact the user for information required by MSU IT to set up these credentials and then provide the user with the login ID.

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[2] MSU provides Microsoft 365 licenses to all MSU faculty and academic staff. For non-MSU users, please visit this link to check the type of license: http://tinyurl.com/3y4h775d. Please contact abr.research.admin@msu.edu if you do not have an Office 365 license. mailto:abr.research.admin@msu.edub

If you encounter any problems when using the M-AAA Portal, please contact the Research Evaluation and Data Analytics Team at ABR.Research.Admin@msu.edu.

(2) Computing Device:

The Portal is primarily optimized for desktops, big-screen devices such as computer tablets (landscape mode), and laptops. To ensure the best user experience, users are encouraged to access the Portal on larger screens. The Portal works on mobile devices; however, text and icons may appear smaller compromising readability. If a mobile device will be used:

• Open the Portal in a mobile browser using the steps listed above for option 1 (web browser).
• Open the Portal using the Power Apps mobile app:
    1) Download and install the Power App mobile app from the app store (e.g., Google Play Store, Apple App Store), if not available on the mobile device a) Android App Link, b) iOS App Link
    2) Launch the App on the mobile device.
    3) Log in using MSU credentials*.
    *Note: This App requires multi-factor authentication required by MSU through OKTA, follow the prompts to complete the verification.

* For non-MSU users, please wait to access the App after MSU IT sets up user credentials. The grant administrator will contact the user for information required by MSU IT to set up these credentials and then provide the user with the login ID.

    4) Or scan the QR code on the first page of the document and the user should navigate to the Power App installed. *If the PowerApps Mobile app is not installed it will navigate to the screen below where user can install the App or use it in the browser (See Figure 1 below).

> If you encounter any problems when using the M-AAA Portal, please contact the Research Evaluation and Data Analytics Team at ABR.Research.Admin@msu.edu.
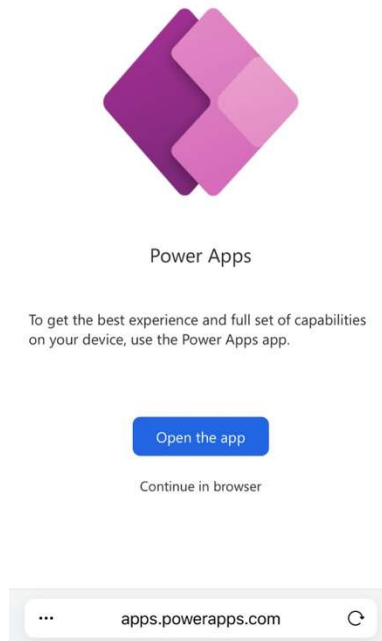

Figure 1. Power Apps prompt screen to install or view the New M-AAA Portal.

(4) Connection Requirements:

After the successful login, the Portal will ask the user to allow the data connections (Figure 2). Clicking "Allow" leads the user to the welcome page of the Portal. **Note:** Please ensure that all connections are enabled. Scroll down to check if there are connections that require log-in.

> If you encounter any problems when using the M-AAA Portal, please contact the Research Evaluation and Data Analytics Team at ABR.Research.Admin@msu.edu.
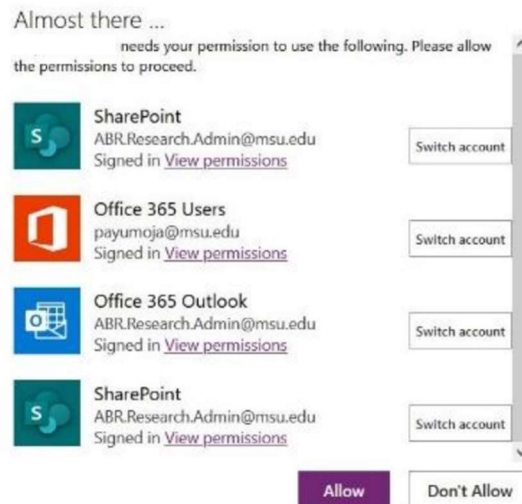
Figure 2. Prompt to allow the data connection.

2.3 User Registration and Logging In

Default User Roles:

- The default login for existing M-AAA PIs and users of the old M-AAA system from MSU is set as Principal Investigator.
- The admin login button is for designated personnel responsible for project administration, with full administrator privileges (visibility and control) over the proposals submitted through the App.
- The reviewer login button is automatically enabled for users assigned to review and score proposals.

User Registration:
- New PIs/users[3] are required to fill out the account setup request form - Link. This form ensures that new users are properly identified, Portal requirements are determined, and authenticated within the system.
- After the M-AAA program administration's approval, the Portal administrator will create, within two (2) business days, a new user account and submit an access request to MSU Information Technology (IT)*.
- The user gets an approval email and can now log in to the PI Portal.

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[3] If the PI has previously submitted a proposal for Project-GREEEN or M-AAA, you will already have access to the M-AAA Portal.

If you encounter any problems when using the M-AAA Portal, please contact the Research Evaluation and Data Analytics Team at ABR.Research.Admin@msu.edu.

*Note: MSU IT's access approval may take 3-5 business days so new PIs/users are advised to submit requests as early as possible.
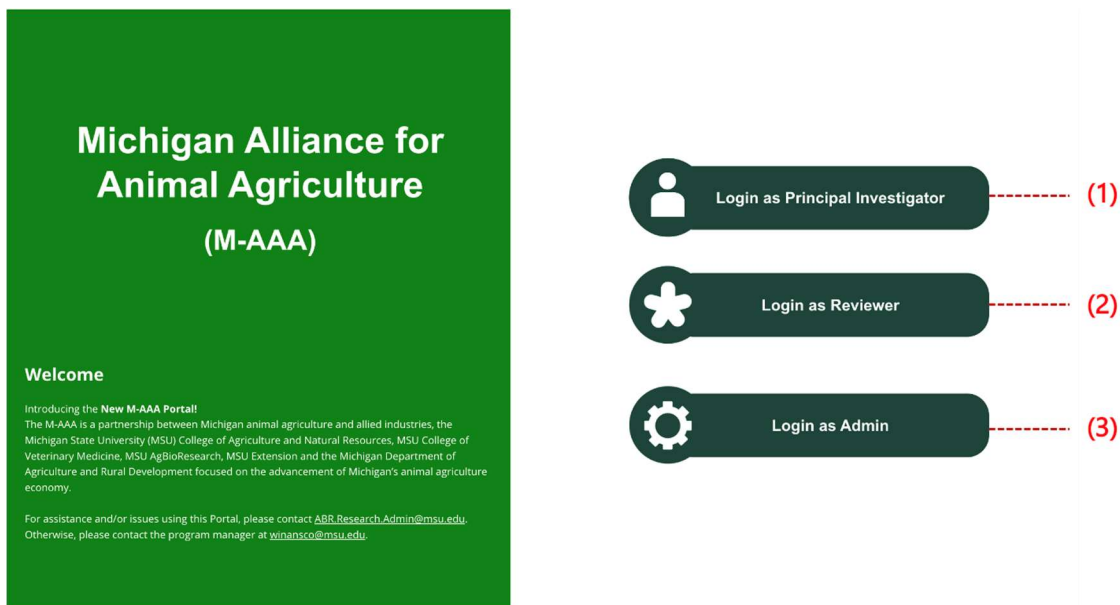

Figure 3. The New M-AAA Portal login page.

How to Login

(1) Log in as PI: When clicked, the user/PI is directed to the PI Portal which provides essential information about their role within the Portal. Clicking "Go to Submit" leads the user to access and/or complete the proposal submission form. The user can also view and interact with their respective proposals.

(2) Log in as Reviewer: When clicked, the user/reviewer is directed to a page with a brief overview of their responsibilities as a reviewer. Clicking "Go to Review" leads the user to review the proposals based on specific scoring criteria.

(3) Log in as Administrator: When clicked, the user/administrator is directed to the Admin Portal which introduces the administrative role and its privileges.

==Note: If you see a notification that a new version of the App is available, please refresh to load the latest update.==
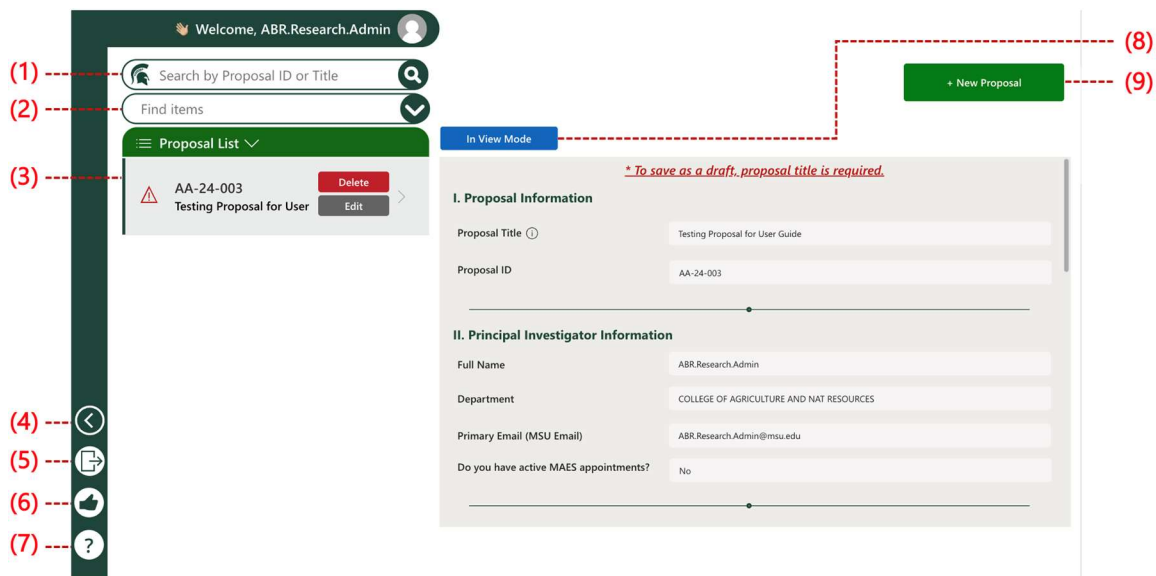
3. PI Portal

3.1 Overview

Figure 4. PI Portal and key components.

(1) Search Box: Enables PIs to instantly search for specific proposals by typing the proposal ID or relevant keywords or phrases from the proposal title. This feature simplifies the process of locating proposals for PIs with many submissions and saved proposals.

(2) Proposal Status Dropdown: Found below the search box, this filter dropdown allows PIs to sort and display proposals based on submission status (Submitted vs. Saved).

(3) List of Proposals: On the left section of the page, it displays the list of PI proposals entered into the system. The list includes basic information such as proposal ID, status, and proposal title. Clicking on a proposal allows PIs to view its details on the right side of the page. A red warning icon indicates the proposal is in 'Saved' status, while a green check icon signifies a submitted proposal. Be sure to check for these visual cues to distinguish between saved and submitted proposals.

(4) Go to the Back Page Button: The arrow icon navigates to the previous page, which shows information about M-AAA funding categories and evaluation criteria.

(5) Sign-out Button: The sign-out icon, when clicked, navigates to the home page, the main login page.

(6) Feedback Button: Allows PIs to submit feedback about user experience and functionality of the Portal.

(7) FAQ Button: When clicked, displays frequently asked questions, answers, and contact information if users need help using the Portal.

(8) Status Icon: Displays two modes: view mode and edit mode. View mode (blue color) allows the user to view proposals while the edit mode (red color) allows the user to create or edit a proposal.

(9) New Proposal Button: Enables PIs to create a new proposal. When clicked, a new submission form will open on the right, and PIs can enter all necessary details for the required fields and save/submit the proposal when ready. Some information in the form is auto-populated based on user credentials.

3.2 Submitting a Proposal

Figure 5. PI Portal to submit proposals.

To create a new proposal, click the "+ New Proposal" button in the top right, and a submission form will open on the right. Entering the proposal title will activate the 'Save as draft' button to work and allow the user to save the proposal. Entering information to all mandatory fields will activate the 'Submit' button and allow the user to submit the proposal (Figure 5). The user will receive an automatic email notification if a proposal is saved or submitted into the App. Even though an email notification is not sent out to the user, the proposal has been successfully submitted as long as the user can find the submitted proposal in the PI Portal.

(1) Saved Proposal – The system emails the PI whenever a PI saves a proposal as a draft or makes an update to an existing proposal and does not click the submit button. See Figure 6 for a sample notification email for a saved proposal.
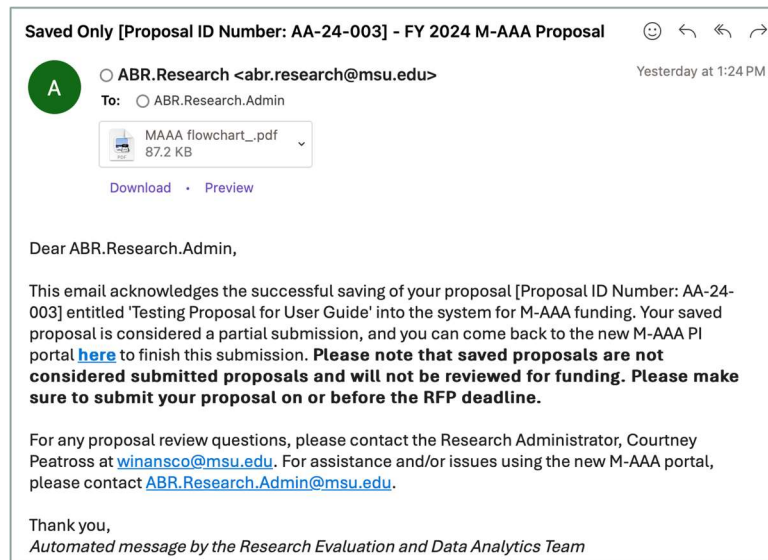

Figure 6. Sample email notification for a saved M-AAA proposal.

(2) Submitted Proposal – The system emails the PI upon proposal submission. See Figure 7 for a sample notification email for a submitted proposal. **Please note that once a proposal is submitted, it can no longer be edited.**

If you encounter any problems when using the M-AAA Portal, please contact the Research Evaluation and Data Analytics Team at ABR.Research.Admin@msu.edu.
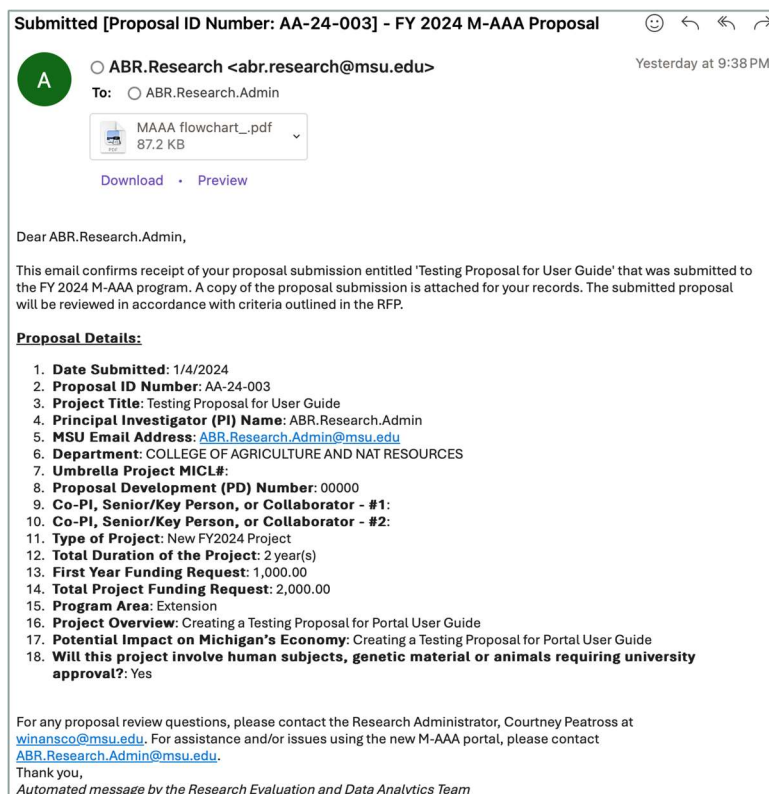

Figure 7. Sample email notification for a submitted M-AAA proposal.

3.3 Editing or Withdrawing a Proposal

Edit: PIs can edit proposals saved as drafts and return to the Portal to edit, complete, and submit the proposal(s) on or before the due date. To edit the draft proposal, click the desired to edit from the proposal list, and the two buttons – 'Delete' and 'Edit' will appear next to the proposal ID and title. Click the 'Edit' button to edit the proposal, and the proposal information will appear on the right.

Withdraw: The system allows PI to withdraw a submitted proposal. To withdraw a proposal, click the 'Delete' button. A confirmation prompt will be displayed to ensure that the delete action is intentional. This prompt will contain the Proposal ID, along with a message asking the user to confirm the action.

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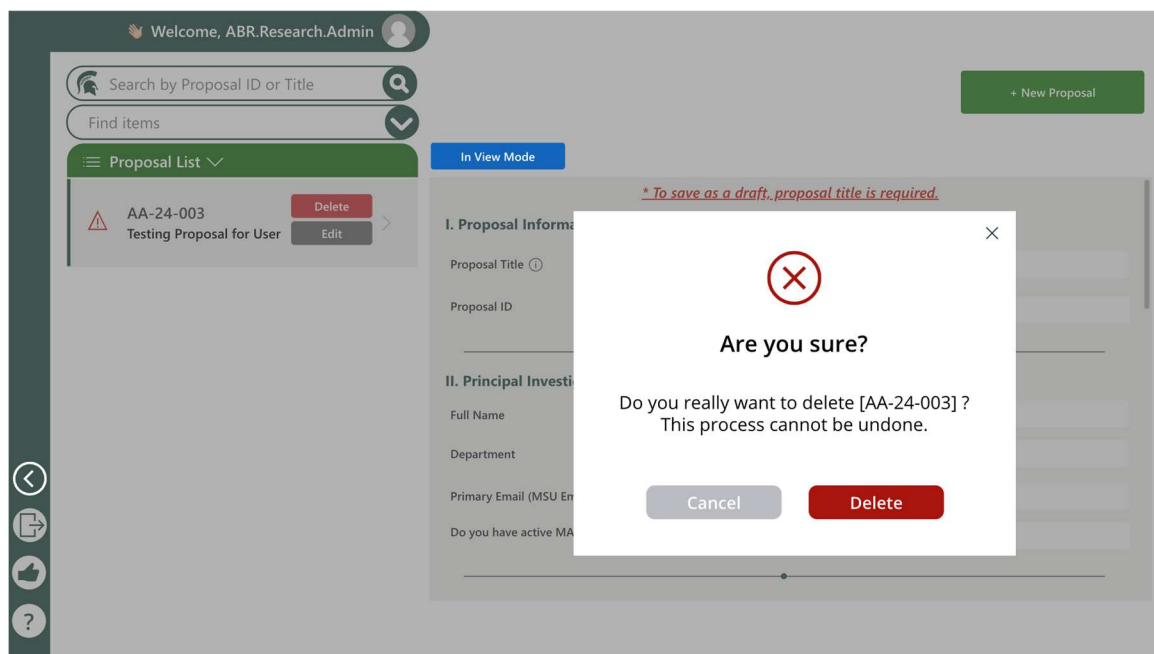

Figure 8. Prompt for PI to confirm deleting or withdrawing a submitted M-AAA proposal.
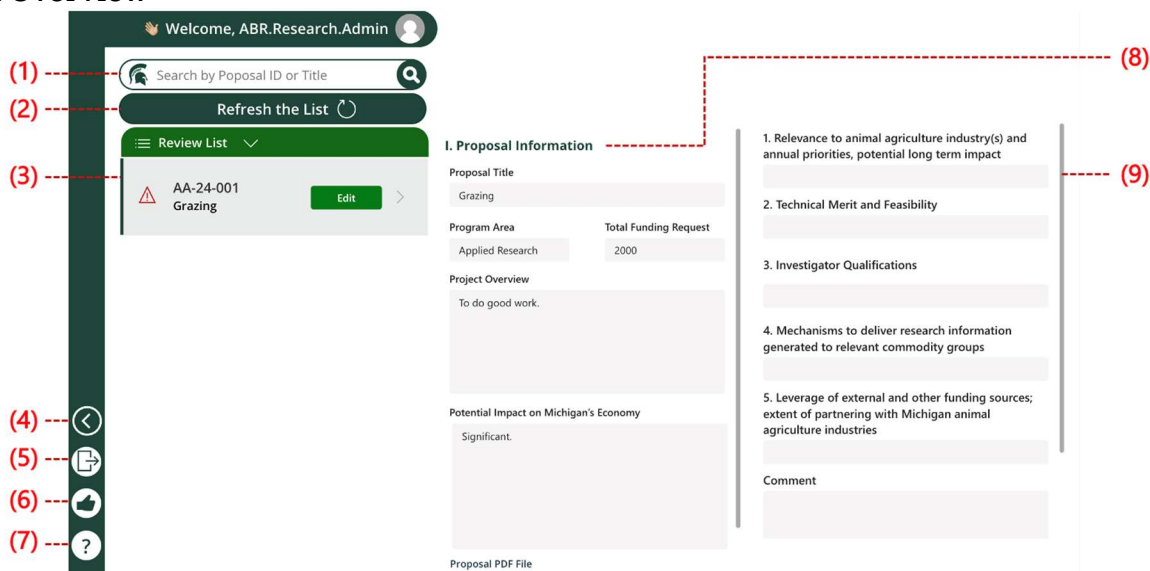
4. Reviewer Portal

4.1 Overview

Figure 9. Reviewer Portal and key components.

(1) Search Box: Allows reviewers to instantly search for specific proposals by typing the Proposal ID or relevant keywords or phrases from the proposal title.

(2) Refresh Button: Allows reviewers to refresh the list of proposals if needed to ensure the list displays up-to-date information.

(3) List of Proposals: The left section of the page displays the list of proposals entered into the system. The list provides basic information such as proposal ID, review status, and proposal title. When a proposal is clicked, it allows reviewers to view the proposal details and evaluation form on the right side of the page. A red warning icon indicates that the corresponding proposal is yet to be reviewed, while a green check icon signifies completion of the review. Ensure to check for these visual cues to distinguish between reviewed and yet-to-be-reviewed proposals.

(4) Go to the Back Page Button: The arrow icon when clicked navigates to the previous page, which displays information about program areas and evaluation criteria.

(5) Sign-out Button: The sign-out icon when clicked navigates to the home page, which is the main or log in page.

(6) Feedback Button: Allows reviewers to submit their feedback about user experience and functionality of the Portal.

(7) FAQ Button: When clicked, displays the frequently asked questions, answers, and contact information in case reviewers need help in using the Portal.

(8) Proposal Information: Displays the basic information of the proposal assigned to reviewers.

(9) Evaluation Form: Displays the criteria, score limit for each question, and a comment field where reviewers can leave their comments and feedback on the proposal.

4.2 Receipt of Assigned Proposals for Review

The M-AAA program administrator shall assign a reviewer to each M-AAA proposal. The assigned reviewer will receive an automated email from the system. See Figure 10 for a sample notification email that a reviewer will receive once assigned to a specific proposal.
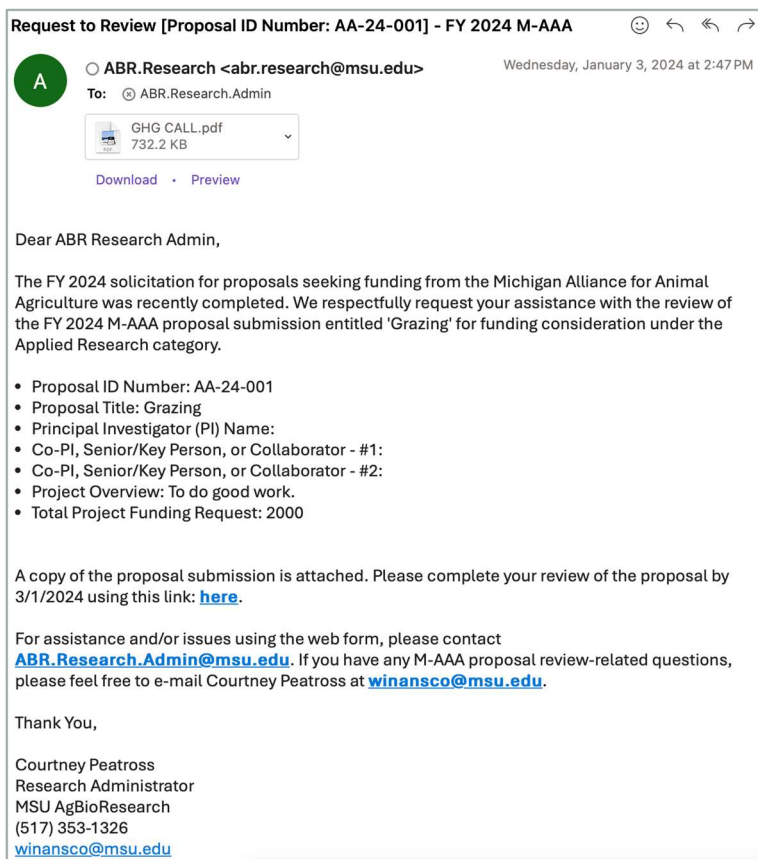

Figure 10. Sample email notification when a reviewer has been assigned to an M-AAA proposal.

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4.3 Proposal Evaluation

(1) Saved Scores – The system emails the reviewer after saving scores for a particular proposal. See Figure 11 for a sample notification when reviewers saved a review/score to an M-AAA proposal.
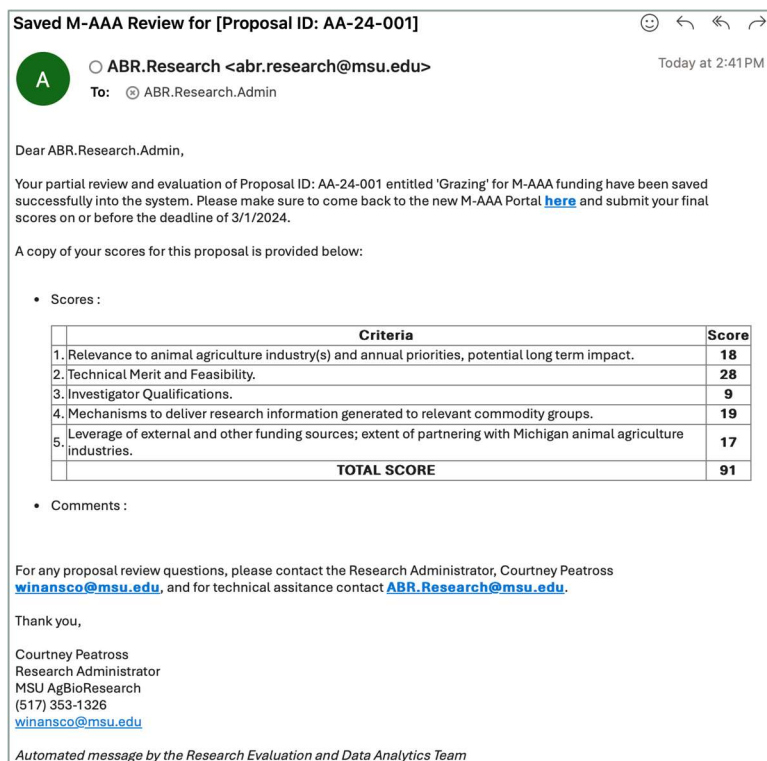

Figure 11. Sample email notification when a reviewer saved his review to an assigned M-AAA proposal.

(2) Submitted Scores – The system emails the reviewer after a reviewer submits scores for a particular proposal. See Figure 12 for a sample notification when reviewers submitted a review/score to an M-AAA proposal.

If you encounter any problems when using the M-AAA Portal, please contact the Research Evaluation and Data Analytics Team at ABR.Research.Admin@msu.edu.

M-AAA Review Submitted for [Proposal ID: AA-24-001]

A   ○ ABR.Research <abr.research@msu.edu>   Today at 2:42 PM
     To: ⊗ ABR.Research.Admin

Dear ABR.Research.Admin,

This email confirms your review and evaluation of M-AAA [Proposal ID Number: AA-24-001] entitled 'Grazing' for funding consideration under the FY2024 M-AAA program.

A copy of your scores for this proposal is provided below:

- Scores :

	Criteria	Score
1.	Relevance to animal agriculture industry(s) and annual priorities, potential long term impact.	18
2.	Technical Merit and Feasibility.	28
3.	Investigator Qualifications.	9
4.	Mechanisms to deliver research information generated to relevant commodity groups.	19
5.	Leverage of external and other funding sources; extent of partnering with Michigan animal agriculture industries.	17
	TOTAL SCORE	91

- Comments :

Please feel free to contact me if you have any questions.

Thank you

Courtney Peatross
Research Administrator
MSU AgBioResearch
Office of Research Support
(517) 353-1326
Automated message by the Research Evaluation and Data Analytics Team

Figure 12. Sample email notification when a reviewer submitted a review to an assigned M-AAA proposal.