



United States  
Department of  
Agriculture

National Institute  
of Food and  
Agriculture

Regional IPM Centers  
Proposal/Project Management System (PPMS)

# Project Director's Guide

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PPMS is developed and maintained by the NSF Center for IPM for the USDA Regional IPM Centers with the support of the USDA National Institute of Food and Agriculture.

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## Introduction

This guide explains the key tasks of a project director user in PPMS. Functions performed by Project Directors include:

- View open RFAs
- Submit proposals
- Submit project reports

## Conventions used in PPMS and in this guide



- The *PPMS header image* will vary from region to region. Click it to return to the “home” screen (or the “role selection” screen if your account has been assigned more than one user role).
- Links in the *green navigation bar* will change depending on whether you are logged in and which role you are operating under.
- Links opening in a new browser window are indicated with a “new window” icon: 
- Links to external websites (open in the same browser window) are indicated with an “external site” icon: 

Much of the documentation is written in sequential steps. To help you find the page being discussed if you are looking at only one section, navigation references are included. When using a navigation reference, it is assumed that you have already logged into PPMS as an Admin user. For example, the following reference indicates the navigation steps to the “Admin View Projects” page: [PROJECT ADMIN > ENTER YEAR > SELECT RFA > VIEW/EDIT PROJECTS]

In many places where information is presented in a table, there will be an accompanying link or button to download the table as an MS Excel spreadsheet. This file is saved in HTML table format. When you

open the document in MS Excel, you may be prompted for confirmation. Click “Yes” to open the document.

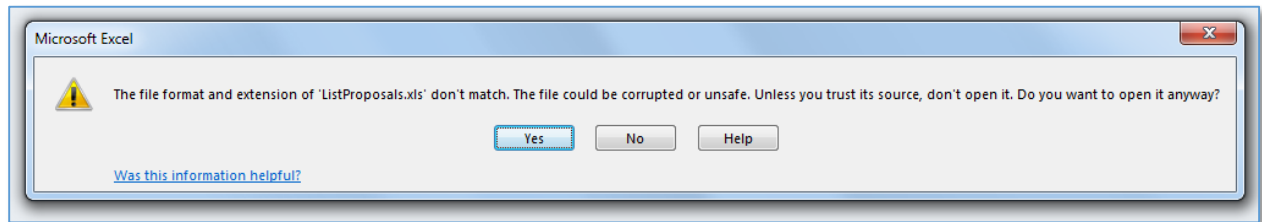


Figure 1: MS Excel confirmation prompt to open file

*PLEASE NOTE: Throughout this document, what is pictured and described may vary slightly from the actual web pages due to changes as we improve functionality and differences between regions.*

## Accessing the PPMS website

You can always view current RFAs through links from your Regional IPM Center without logging in. You can also download the needed proposal submission forms for any RFA via the same links.

Project directors who need to submit proposals and project reports will need to log into the system using a PPMS *project director* account. If you do not already have an account, you can create one during the login process. Once logged in, you will still be able to see the active RFAs and necessary forms.

Each regional IPM Center uses a separate proposal database. If you have used PPMS before; but not in the region you are submitting a proposal to now, you will need to register within that region. For example, if you used PPMS to submit a proposal last year to the Northeastern IPM Center, but this year you will submit a proposal to the Western IPM Center, you will need to register as a project director for the Western IPM Center.

## Logging in

Browse to the PPMS website at <http://projects.ipmcenters.org>. Click on your region to go to the public PPMS website for your region.



Figure 2: Region selection

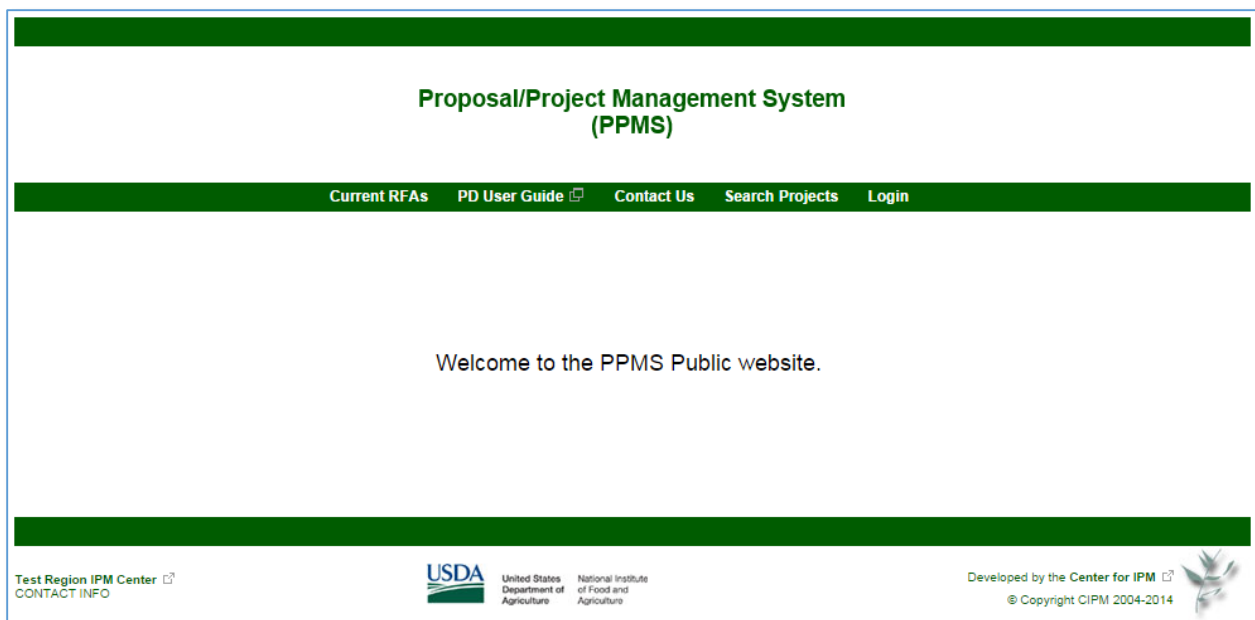
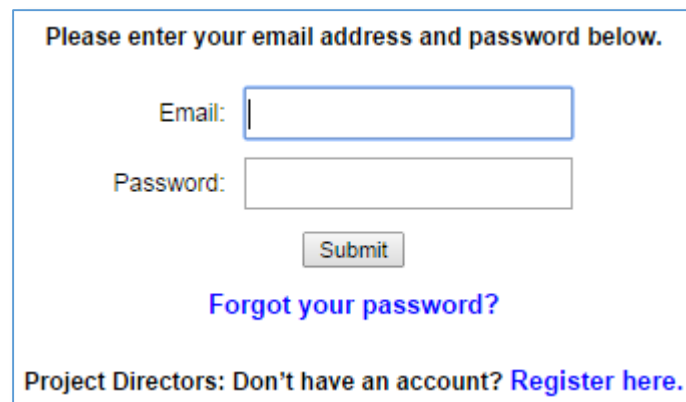


Figure 3: PPMS public welcome page

Click the “Login” link in the green navigation bar. You will be prompted for your email and password. If you forget your password, click the “Forgot your password?” link to have a new password emailed to you. If you do not yet have an account, click “Register here”.



Please enter your email address and password below.

Email:

Password:

[Forgot your password?](#)

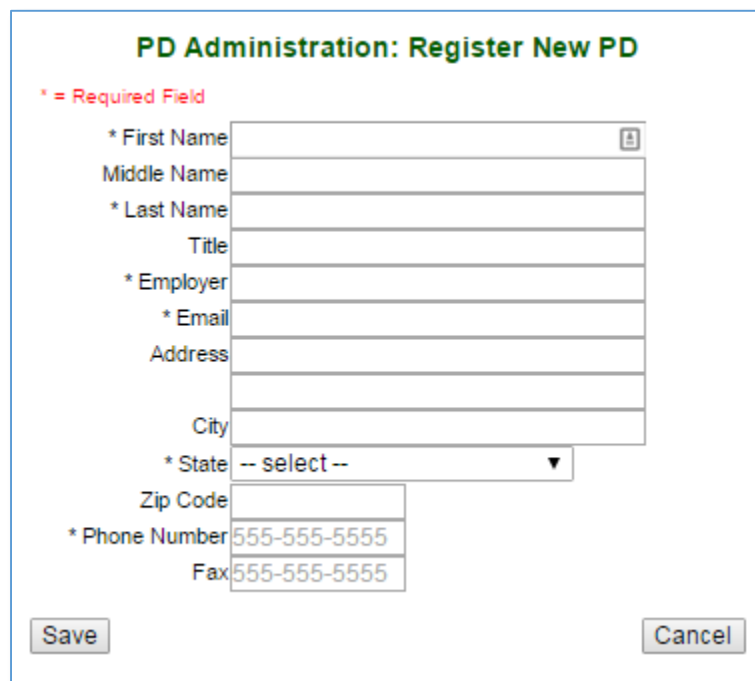
Project Directors: Don't have an account? [Register here.](#)

Figure 4: Login prompt

### Getting an account

After clicking the “Register here” link, complete the registration form.

*We will NOT provide your information to anyone outside of the Regional IPM Center staff and USDA/CSREES, except that public information provided for funded projects.*



**PD Administration: Register New PD**

\* = Required Field

\* First Name

Middle Name

\* Last Name

Title

\* Employer

\* Email

Address

City

\* State

Zip Code

\* Phone Number

Fax

When you save your registration, a confirmation email will be sent to you with login instructions. Please be sure to use an accurate email address in your registration.

## Selecting a user role

Most users will have only one user role; but if an administrator has assigned additional roles to your account, logging in will take you to a role selection page where you can choose type of user role to use for the current browser session.

*This guide discusses only functions of the “project director” role. Once you have selected a role, you may change roles at any time by clicking the PPMS header image or the “Home” link in the green navigation bar.*

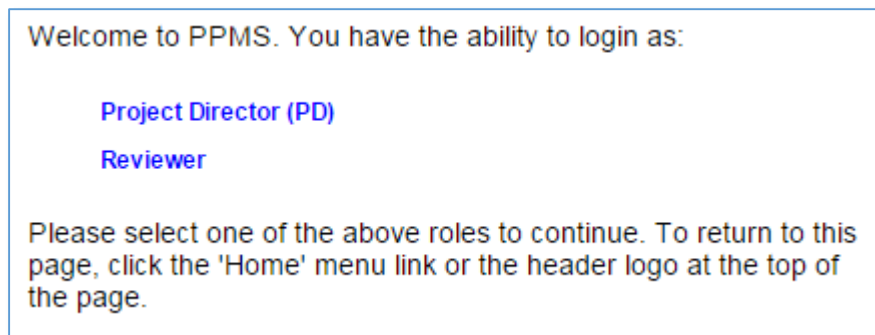


Figure 5: User role selection

If your user account has only one user role associated with it, you will not be presented with a role selection; but will be taken directly to the main page for your role. The functionality described in this guide is only available if your user account is assigned the “project director” role.

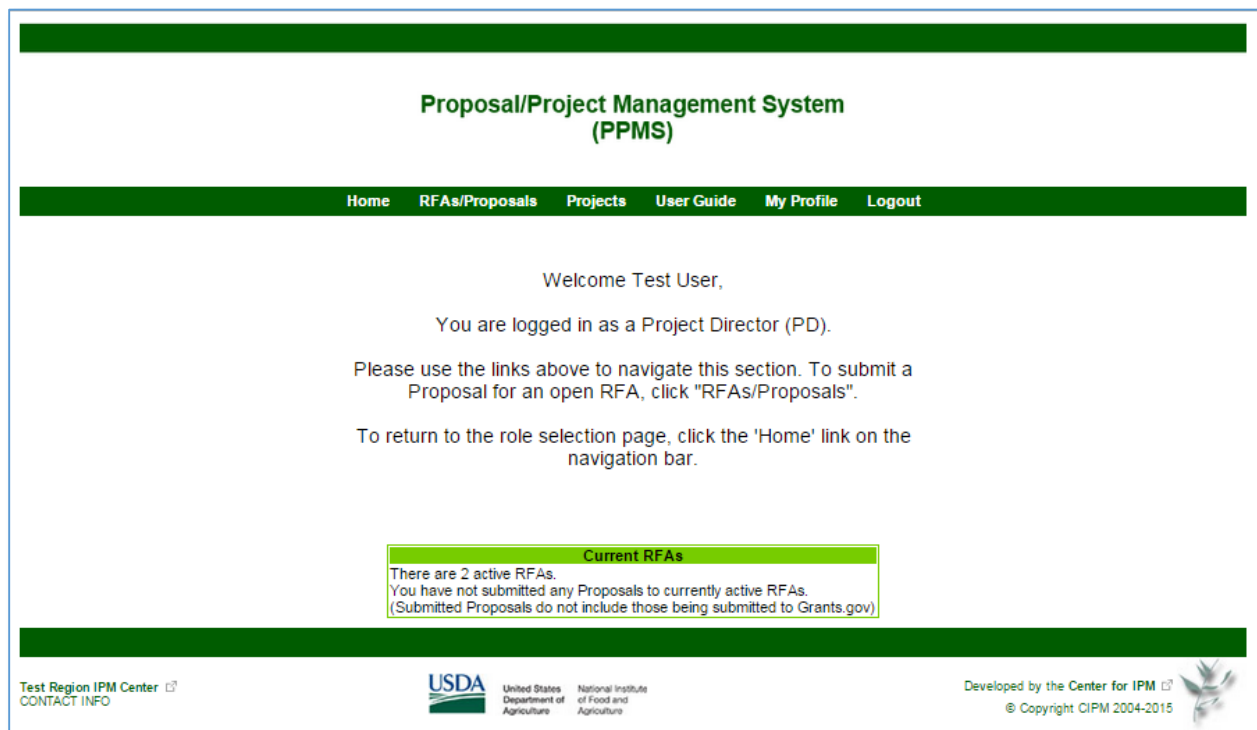


Figure 6: Project Director welcome page

## Exiting the system

If you are logged in, you can click the “Logout” link in the green navigation bar at any time to close your session. If your browser window is left inactive for an extended period of time, you will be logged out automatically.

## RFAs and proposals

The RFAs/Proposals section allows you to submit proposals for an RFA. Click the “RFAs/Proposals” link in the green navigation bar to go to the main proposals page. Here there is a link to the list of current RFAs and a list of your proposals. If you have already submitted active proposals, there will be links to view them. If you have in-progress proposals not yet submitted, links to those will also be listed, as in this example.

**PD Access: Proposals**  
**Add new proposals**  
Select an RFA to begin the process of adding a new proposal  
[List of Current RFAs](#)  
**Active Proposals in Progress** (Does not include proposals being submitted to Grants.gov)  
RFA: TEST RFA  
Proposal Title: A test proposal for the t...  
**This has not been submitted as a final proposal yet.**  
[Continue Submission](#)  
**Submitted Proposals** (Does not include proposals being submitted to Grants.gov)  
You can view, but not change any submitted proposals.  
RFA: TEST RFA  
Proposal Title: A second test proposal for the test RFA  
Submitted: 8/11/2015  
[View Submitted Proposal](#)

Figure 7: Proposals section

## Viewing RFAs

From the RFA/Proposals page [RFA/PROPOSALS], click “List of Current RFAs” to see the list of open RFAs.

PD Access: Current RFAs		
Title	Description	Submission Deadline
<a href="#">TEST RFA</a>	This is a test RFA.	1/1/2014
<a href="#">SECOND TEST RFA</a>	This is a second test RFA.	12/13/2013

Figure 8: List of current RFAs

Click the title of an RFA to view details.



**PD Access: RFA Details**

**Test Region IPM Center**  
**TEST RFA**  
 This is a test RFA.  
**Submission Deadline 1/1/2014**

The full RFA document is available in the following formats. Click on the links to download.

[Word Document](#) 
[Acrobat PDF Document](#) 
[Web Page](#) 

**You will need to download the following forms**, fill them out and upload the forms in the appropriate format to submit a proposal. **DO NOT USE USDA FORMS.**  
 Right-click on the Form name and choose "save link as" to download.

<b>test form</b> 	Please download this download and complete this fillable PDF form, then upload it with your proposal.
<b>budget</b> 	Please download this budget template spreadsheet, complete it, save it as a PDF, and upload the PDF with your proposal.

**Ready To Begin Submission?**

**Questions? Problems?**  
**RFA Contact:** Test RFA administrative contact  
**Phone:** 555-555-5555  
**Email:** test-admin-contact@example.org

Figure 9: View RFA details

## Submitting a proposal

After having logged into the system, click "RFAs/Proposals" in the green navigation bar.

Click "List of Current RFAs".

Click the title of an RFA to view its details. Here you can download any forms provided by the RFA manager. You will complete these forms and upload them later with your proposal.

Near the bottom of the RFA details page, click the "Enter New Proposal" button.

**Proposal Submission**

**Ready To Begin Submission?**

The "Edit Proposal" form will be displayed, where you will enter the details of your proposal. After completing the form, click the "Save Proposal Data" button.

Specify PDs for the proposal. Note, if you do not list yourself as a PD, you will not be able to edit this proposal after logging out.

**PD Access: Specify PDs**  
The following PDs are currently assigned to this proposal:  
TestPD, TestPD (1) [\[Delete\]](#)  
  
**Assign another PD:**  
Select from registered PDs PD order: First [Add](#)  

OR

Register New PD

  
When you are finished adding PDs, click Continue:  
[Continue](#)

On the “View Proposal” page, upload the forms you are submitting with your proposal. These are the forms you completed after downloading them from the “View RFA” page.

Form	Description	Action	Notes
<b>Project Narrative</b> (PDF document)	This word file must be converted to PDF prior to submission. This template shows required headings. Format 1" margins, 12 point font, single or double space, 8 page limit.	<a href="#">Upload/Submit Form</a>	Uploaded file must be pdf
<b>Conflict of interest form</b> (PDF document)	List any conflicts of interest	<a href="#">Upload/Submit Form</a>	Uploaded file must be pdf

When you are satisfied that your proposal is complete, click the “Submit Final Proposal” button at the bottom of the “View Proposal” page. Alternatively, if you are listed as a PD, you can log out and return to finish and submit the proposal at a later time. Once the proposal is submitted, you will not be able to make changes without assistance from an administrator.

## Project reports

If your proposal is selected for funding through the review process, you will be asked to submit project reports through the PPMS system.

After logging into the system as a Project Director, click “Projects” in the green navigation bar. If a request to submit a report has been issued, you will see your project listed with a link: “Enter Interim/Annual Report” or “Enter Final Report”.

**Project Title:** [Test proposal B](#)  
Start Date: Jan-01-2013  
End Date: Dec-31-2013  
  
**Interim/Annual Reports**  
Requested: Aug-13-2013  
Unsubmitted  
[Enter Interim/Annual Report](#)

**Project Title:** [Test Proposal F](#)  
Start Date: Jan-01-2013  
End Date: Aug-12-2013  
  
**Final Report**  
Requested: Aug-13-2013  
Unsubmitted  
[Enter Final Report](#)

Click the link to enter a report. This will bring up the project report form. There will be a series of sections where you can enter/edit text, followed by an area where you can upload attachments.

If you need to, you can leave and return later to complete the report. In that case, when you return you will see a link to “continue” rather than “enter” a report for the project.

**Project Title:** [Test proposal B](#)  
Start Date: Jan-01-2013  
End Date: Dec-31-2013  
  
**Interim/Annual Reports**  
Requested: Aug-13-2013  
In progress, unsubmitted (last updated Aug-15-2013)  
[Continue Interim/Annual Report](#) OR [Delete and Start Over](#)

When your report is completed, you must click the “Submit Interim Report” button near the bottom of the form.

#### **Interim Report Submission**

When you are satisfied with your report, click 'Submit Interim Report' below. NOTE: When you submit your report, you cannot change any information. There is no 'Are you sure?'

[Submit Interim Report](#)

### **Final Report Submission**

When you are satisfied with your report, click 'Submit Final Report' below. NOTE: When you submit your report, you cannot change any information. There is no 'Are you sure?'

[Submit Final Report](#)

When you submit the report, the report administrator will receive a notification by email.