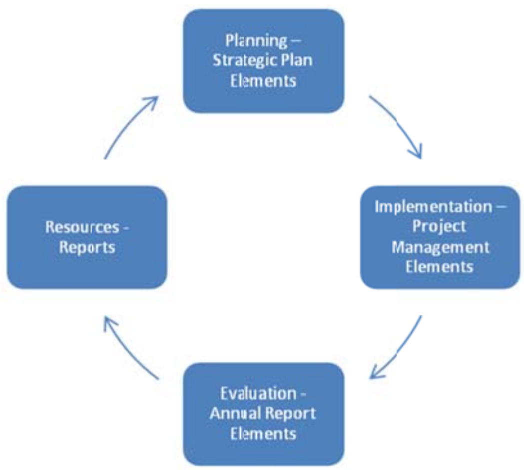
Planning, Implementation, and Evaluation Resources

PIER

User Edition

https://Pier.SeaGrant.NOAA.gov



Updated May 2013

National Sea Grant Office

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General Information

Logging into PIER and other sites

Pier site web address: https://pier.seagrant.noaa.gov.

For access to PIER, the Sea Grant Knauss Fellowship sites, and the upcoming address book, first time system users click "**New User Registration.**" Enter your contact information as prompted. Your user ID name will be automatically derived from your First and Last name.

For access to PIER, select your Sea Grant program from the first dropdown menu titled **"Sea Grant Staff Only".**

For access to the Sea Grant Knauss Host site, select your office name.

For access to the Sea Grant Knauss fellow site, select your sponsoring Sea Grant Program and year from the dropdowns.

NOTE – Password generations must be **7 characters long** and contain at least one each of the following elements: **an uppercase letter, a lowercase letter, a symbol, and a number**. A confirmation screen will appear after you click "**Create User**." Access to this system will NOT be granted until an Administrator has reviewed and approved your request (generally within one business day) – if you need immediate access, please call Dorn Carlson at 301-734-1080.

Navigation

The navigation bar underneath the title "National Sea Grant College Program" links to various areas of the Sea Grant website. In order to get back to the PIER User Home Page, please click the navigation tab on the far right titled "PIER".

Once logged into the system you will find a **navigation column on the left side of the page**. This column enables you to navigate quickly between the pages and components listed, helping you find what you need. The four main components of the PIER system are: **Planning** (Strategic Planning Elements), **Implementation** (Project Management Elements), **Evaluation** (Annual Report Elements), and **Resources** (Reports).

Helpful Hints

- Much of PIER uses tables to display the data. If the column heading is underlined, clicking it will sort the data by that column.
- For sections that require a large amount of data entry, there is often an overview table at the top of the page, and data entry occurs within Edit tabs below. You may have to scroll down to see the edit tabs.
- To edit information within a table you will click a button on the appropriate table row. Generally, "Edit" buttons make that table row directly editable, while "Select" buttons populate editable tabs below the table. The editable tabs are generally are used to edit more complex data within the tabs below.

- Depending on the width of your browser window, there may be additional columns of a table not showing off the right side of your screen. You can move to these cells using the arrow keys on your keyboard (after clicking anywhere on the table), or using the horizontal scroll bar at the bottom of the table.
- The “collapse” arrows in the left navigation allow you to hide the left navigation column and increase the portion of your screen available for data entry.
- Set "display" to "max" to view/export all records from a single search.
- To view all data shown on the screen in an excel spreadsheet, click the "export grid" button above the grid.

Functional Buttons in Left Navigation Column

Logout

Click this button to log out of your current session and return to the login page.

Change Password

Click here to change your password.

Suggestions

A place to provide feedback on PIER / suggestions for improvement.
Once on the suggestion page, to add a suggestion:

- Click “Add New Suggestion” above the table. This inserts a new row at the top of the table.
- Choose the appropriate selections from the dropdown menus and type your comment into the Comment textbox.
- To submit your suggestion, hit “Save” on the left side of the comment box.

PIER Home Page

The PIER homepage acts as a landing page for the system, and provides an overview of recent activity, deadlines, updates and upload modules. Within the PIER homepage you will find:

- **PIER News** provides updates and helpful hints about the PIER system. *This section is specific to PIER*, as broader Sea Grant News will be shared through the Sea Grant website**.**
- **Events and Deadlines** provide information about important dates. *This section is specific to PIER*, as broader Sea Grant Calendar will be shared through the Sea Grant website**.**
- **Upload Documents** allows you to upload documents and reports from your computer, it also allows you to look up certain documents already submitted by you, or another PIER user in your program.
- **Tabbed Information**
    - **Program Data Updates** helps you keep track of changes in the PIER system to your Program’s data.
    - **Feature Live Items** will show the information your Program wants to share through the Sea Grant Website.

- **Status** provides a count of your Program elements in different Statuses within the assorted areas of PIER
- **Your Suggestions** displays a list of your suggestions and their status, any response, and the date originally submitted.
- **Fixed/Addressed Suggestions** shows all recently fixed or addressed suggestions submitted by any PIER User
- **Search** provides a search function to search all of your Program data for a given text entry.

Planning – Strategic Planning Elements

This section allows users to view or edit the user's program strategic plan(s). Users will report on progress made towards the plan in the other sections of PIER.

Strategic Plans Page

This page can be found in the left hand side navigation column, and contains two components:

- **Strategic Plan Table** - lists strategic plans for your program with data in PIER. Select strategic plans you want to edit or export.
- **"Edit Strategic Plan Information" Panel** – when a plan is selected, this section provides a user interface to enter / edit data related to the selected strategic plan. Each tab collects information on a different section of the plan. To edit your plan once it is submitted, please contact your Program Officer.

By selecting the "Strategic Plans" subcomponent link, you will be able to click on and view listings of all the strategic plans for your program and others from both the past and the present**. To view or edit the details of a specific plan**, click the "View/Edit plan" button to populate the tabs and edit the current strategic plan information.

To **Create a New Strategic Plan,** click the "Create New Strategic Plan" button to the upper right. This feature was used for the 2014-2017 plans. This feature is currently disabled, but will be turned on before the next round of strategic plan entry (in 2016). **To enter a plan**, type or paste information into the appropriate text boxes within the tabs of the "Edit Strategic Plan Information" section. The Strategic Plan text box and Focus Area dropdown at the top of this section let you know which items you have selected. The system defaults to selecting the first Focus Area in the system. This selection powers the dependent data shown within the other tabs (Goals, Outcomes (Optional), and National and Program Performance Measures). You can easily **change the selected Focus Area** in the Focus Area dropdown menu above the tabs. Prior to submission of the plan, you can **edit information directly in the table in the tab**.

Examples of how the strategic plan information is used throughout the system include:

- **Program Focus areas** populate focus area dropboxes throughout the system.
- **Program Goals** populate dropboxes on the impacts and accomplishment pages.

- The 2010-2013 **Strategies** and **Outcomes** from this page will be included in data exports that show the entire Program Strategic Plan.
- The **2010-2013 Objectives** from this page populate the "Strategic Plan Objectives Reporting" section of "Evaluation – Annual Report Elements".
- The **Performance Measures** from this page populate the "Performance Measures Reporting" section of "Evaluation – Annual Report Elements".

Program Partners Page

This page contains two lists of partners: the "Current Program Partners" list on the right of the page is all partners currently associated with your program, while the "Potential Program Partners" list on the left contains all other partners in the system. ***A specific partner will only show up in one of these lists***.

The "**Current Program Partners"** list populates dropdowns for Partners, Sources, and Institutions in other sections of PIER (e.g., Project, Impact/Accomplishment, and Leveraged funding pages). If you want a name to show up in those dropdown menus, you must "Add" that partner to your "Current Program Partners" list.

The existing list of partners is in alphabetical order. To standardize the list, we have used the following naming conventions:

Standard Naming Convention:

- **Governmental** - O*ffice Name or Organization Name Spelled Out (Department Abbreviation, Agency Abbreviation, Line Abbreviation, Office Abbreviation)*
  - **Example**: Coastal Services Center (DOC, NOAA, NOS, CSC)
- **Academic** – *University, Office Name or Organization Name Spelled Out (University Abbreviation)*
  - **Example:** University of Hawaii at Manoa, Department of Zoology (UHM)

To view partners on other pages, scroll down to the bottom of the page and click on the page number you wish to view. To **Filter Partners** in the Potential Partners list, either select a choice from the **Type** or **Scale** dropdowns (filter occurs automatically) or type any part of a name or abbreviation in the **Text** textbox and click "Apply Filter."

Multiple Partners may be selected to **Add to** or **Remove from** the **Program Partners** list by using the check boxes or "Check All" and clicking "Add Partner" or "Remove Partner". Note: Partners from the "Current Program Partners" marked as 'used' are associated with projects, impacts, or accomplishments and cannot be removed.

If you cannot locate a partner in the "Potential Partners" list, please click the word "Here" in the headers above the horizontal line. You'll be provided an excel spreadsheet with instructions for adding partners.

Implementation - Project Management Elements

In this section, programs provide information about implementation of the strategic plan through projects and resulting accomplishments and impacts.

Projects Page

The **Projects** page lists all projects associated with your Program.   Programs must enter projects for all the funds granted by the National Sea Grant Office including the Sea Grant appropriation, match, and funds that pass thru the NSGO. Any projects/funds that a program receives, not through the NSGO, can be captured using the "leveraged funding" section.

Use the Filters at the top of the page to limit the number of records displayed or to find a specific project. To filter projects, select from the multiple dropdowns or type in the text fields (e.g., “NA10OAR4170001” in the Grant # box will show only projects from the Grant “NA10OAR4170001”). Remember: Click any column heading to sort by that column.   To view all data shown on the screen in an excel spread sheet, click the "export grid" button above the grid.

To **edit or view details for a particular project**, click “Select” in that row to fill the “Edit Project Information” tabs below the table. After a Project is selected OR you have clicked the “Insert New Project” button, enter/edit information for that project within the appropriate tabs. Save changes before submitting.

Projects: General Tab *Some Records Lock after Submitted*

On this tab you can edit the very basic project information of Award #, Program Project ID, Project Title, and Regional/Multi-Program status.   These fields lock for editing when the project is submitted to the NSGO.

To provide a more complete picture of the project, certain items (Abstract, Partners, Classification, Focus Areas, and Investigators) are in a read-only format on this tab - edit these sections in their respective tabs. These tabs remain editable when a project is submitted.

Projects: Funding Tab*Records Lock after Submitted *

On this tab you may **edit existing funding records** by clicking “Edit” in the appropriate row of the table. You may also **add additional funding records** by clicking the “Add New Record” button under the table. Most fund records should include only a single year of funding. Similar to the general tab, you may save your edits at any time, but submitting a record locks it. The Federal Year column is read-only, and is calculated by the “Start Date” of the record.

Projects: Leveraged Funding Tab *Records Lock after Submitted *

On this tab you may edit existing leveraged funding records **associated with the given project** by clicking “Edit” in the appropriate row of the table. You may also **add additional leveraged funding records** by clicking the “Add New Record” button under the table. Similar to the general tab, you may save your edits at any time, but submitting a record locks it. The Annual Report Year column is read-only, and is calculated by the “Start Date” of the record.

Projects: Impacts & Accomplishments Tab

This tab provides a look at impacts and accomplishments associated with the selected project. Although it is possible to add a new impact or accomplishment here by pushing the "Add New Record" button, it is not recommended, as this button provides only very limited functionality. You cannot associate the impact with a strategic plan goal by this method, for example.

Impacts and accomplishments should be added from the Impacts & Accomplishments page, described below. If you are adding an impact or accomplishment that you intend to associate with a specific project, note the project number here on the Projects page, then go to the Impacts and Accomplishments page to add the impact. You can associate the impact or accomplishment with the project from the Impacts & Accomplishments page. (This is easier if you know the project number.)

Funding Page

The **Funding** page stores information on all funds that are granted by the National Sea Grant Office including the Sea Grant appropriation, match, and funds that pass thru the NSGO. The fund records can be added or viewed from either the projects or funding page.

Use the Filters at the top of the page to sort the data in many ways, including limiting the number of records displayed, finding out how much was spent on a certain amendment number, and finding a specific fund record. To filter, select from the multiple dropdowns (e.g., “NA03OAR4170020” in the Grant # box will show only projects from the Grant “NA03OAR4170020”) or type in the text fields. Click any column heading to sort by that column. To view all data shown on the screen in an excel spreadsheet, click the "export grid" button above the grid. Set "display" to "max" to view/export all records from a single search.

To **edit details for a particular fund record**, click “Edit" in the appropriate row of the table. You may also **add additional funding records** by clicking the “Insert Record” button at the top right of the table. You may save your edits at any time. The Federal Year column is read-only, and is calculated by the “Start Date” of the record. Once your fund record is complete (including selecting a functional area), hit the "submit" button. The NSGO will then review the record, add the fund source and amendment number (if not know when you submit) and approve it. Once the NOAA Grants Office awards the funding, the record will be set to "awarded" status.

NOTE –Fed FY is calculated by the “Start Date” of the Funding Record (unless adjusted by the NSGO). The Fed FY column denotes the Federal year in which the funding was awarded.

"Awarded $ Hide/Show" and "Actual $ Hide/Show" buttons at upper right hand of the grid can be used to hide or show the selected columns allowing more to be seen on your screen.

Transfer Funds Between Projects

Use this feature to transfer funds from one project to another project within the same grant number. This is usually used to show how the funds from the omnibus program development and future competed projects have been spent. The original "awarded" funding will always appear in the "awarded" column. Transferred funds will appear in the "actual" column.

1. Find the PROJECT FROM which you want to move money using the filters, as needed.
2. Click the “MOVE $” button. A worksheet will pop up. If the button is not visible, the PROJECT STATUS and/or the FUND STATUS are likely not AWARDED. Contact your Program Officer.
3. The worksheet will display all projects TO which you can MOVE FUNDS.
4. “SELECT” the project TO which you wish to MOVE FUNDS.
5. Enter the amount of funds you wish to MOVE.
6. Click TRANSFER FUNDS.

Leveraged Funding Page

The **Leveraged Funding** page stores information about Leveraged Funding **at both the project and the Program Level.** This is funding not already associated with a project in PIER. ***NOTE*** **–Annual Report Year** is calculated by the “Start Date” of the Funding Record.

- To **Find an Existing Leveraged Fund Record**, use the filters at the top of the page or sort any column by clicking on that column header.
- To **Edit or Delete** an existing leveraged fund record, click “Edit” or “Delete” by the appropriate leveraged fund record. Note: *once approved,* funding records cannot be edited or deleted by the Program.
- To **Add New Leveraged Fund Records**, click “Add New Leveraged Fund.” To change the associated project, click on ‘Associate Project.’ Note: the list of projects will appear on multiple pages - you can limit the available Projects with the Award # Filter at the top of the tab. Funds can only be associated with a single project, so multiple records may be used for leveraged funds that support multiple projects.

Impacts& Accomplishments Page

Impacts and Accomplishments **must** be tied to **at least one project, goal, and focus area**, but more than one of each may be selected.

- To **Find an Existing Impact/Accomplishment Record**, use the filters at the top of the page or sort any column by clicking on that column header. The ‘Primary Focus Area’ and ‘Status’ dropdowns will filter automatically when the selection is changed. To apply Program Project ID, Title, Relevance or Recap filters first enter information on one or more of the text boxes and click “Apply Text Filters.” The “Clear Text Filters” button will clear these fields and remove the filter.
- To **Edit or Delete** an existing Impact or Accomplishment**,** click “Select” by the appropriate record. Edit the information in the Edit tabs at the bottom of the page. Note: the General Information for Impacts and Accomplishments cannot be edited once submitted to the NSGO, so ‘Delete’ and ‘Save’ buttons will only appear in this tab if the record Status is either “Not Submitted” or “Returned for Revisions.”
- To **Add New Impact/Accomplishment Records**, click “Add New Record.”
- In the “Status” column, programs can choose to exclude any Impacts from the PRP Report by clicking the button “Exclude from PRP.” The button “Include in PRP” is then available.

Regional and Multi-Program Project Reporting Guidance

Regional Projects and Funding

Regional or Multi-Program projects should be entered into the "Projects" page of PIER by each participating program and flagged as "Regional" or "Multi-Program". The actual funding amount from the NSGO sent to the program to execute the project should also be reported. If a participating project does not receive any direct funding from the NSGO, a fund record denoting $0.00 should be entered in the project. Other participating programs should be selected as partners.

Regional Leveraged Funding

Any funding leveraged by a program for a regional/multi-program project should be entered into "Leveraged Funding" page of PIER and associated with that project. Subcontracting: if one program receives a subcontract from another Sea Grant program, the funds should be included with the fund source of the other program (e.g., if LASG receives a subcontract for a project from TXSG, LASG should report the leveraged funds with a fund source of TXSG).

Regional Impacts and Accomplishments

Any impacts/accomplishments for a regional project can be reported in the "Impacts & Accomplishments" section of PIER by each participating program and associated with their Program's Goal(s).

Regional Metrics and National Performance Measures

Data for metrics and performance measures should not be counted more than once. Thus, regional or multi-program partners should discuss the most appropriate way to divide the data for metrics and national performance measures among the participating programs.

Evaluation - Annual Report Elements (for 2010-2013)

In this section, programs measure their achievement against the measures (goals, objectives, performance measures) outlined in the Program's 2010-2013 Strategic Plan and on national measures and metrics. Note: guidance for 2014-2017 strategic plan reporting will come after the PIE and the metrics/measures committees make their recommendations.

Metrics Page

The **Metrics** page is used to report National Metrics Data. These data are used to explain the scope and work of the entire National Sea Grant College Program. To **Update Program Metrics**, select the appropriate Annual Report Year, enter data in the appropriate text boxes, and click "Update Program Metrics." To update program metrics after the deadline, contact your Program Officer.

Definitions are available here:
https://pier.seagrant.noaa.gov/Public/documents/National_PM_Metrics_Def_2011.pdf

Performance Measures Reporting Page

Progress toward your Strategic Plan and the Sea Grant network's progress toward the National Strategic Plan is tracked through **Performance Measure Reporting**.

Definitions are available here:
https://pier.seagrant.noaa.gov/Public/documents/National_PM_Metrics_Def_2011.pdf

- **National Performance Measures** *#1-#3* are read-only on the summary page. Detailed Performance Measure information is entered on the detailed sub page by following the links in the left navigation or above the table. *These detailed tables will be used to populate Actual and Anticipated values for these National Performance Measures.*
- To **Update National Performance Measures** *#4-#6* and the **Program Performance Measures (from the Strategic Plan section)**, select the Annual Report Year, click "Edit" by the appropriate Performance Measure, enter data in the text boxes, and click "Save." If the "Edit" box is greyed out it means this information is from past annual reports and has been locked. Please contact your Program Officer to make necessary changes.
- Edit **Program Performance Measures** in the bottom table. *Use the **Comments** box to provide context and validation of the performance measure.*

Strategic Plan Objectives Reporting Page (2010-2013 Plans)

Another way to measure progress toward your Strategic Plan is through **Objectives Reporting**. This page provides a method to track progress against your Program's Objectives. Use the Filters at the top of the page to limit the number of Objectives displayed.

- To **Update Objectives Reporting**, select the Annual Report Year, click "Edit" by the appropriate Objective, and indicate whether the Objective is "On Target" to be complete by the final year of your Strategic Plan or whether it has already been "Achieved." *Use the **Comments** box to provide context and validation of the objective results.*

Estimated Level of Effort per Focus Area

Estimated Level of Effort data estimates the proportion of effort ($) devoted to each Program Focus Area. This information is generated on an annual basis.

The first table on this page shows the **Estimated Level of Effort by Focus Area** for the selected Annual Report year. To generate an initial estimate, the system assumes that 100% of the funding for a given project is assigned to that project's primary focus area. If appropriate, you can change this distribution on an individual project basis in the tables for "Distribution of Effort across Focus Areas by Project" or "Distribution of Effort across Focus Areas for Program-Level (i.e., not associated with a project) Leveraged funds".

To adjust this default distribution of funding, click the "Edit" button on the appropriate project row, and then change the given percentages. The changes will be reflected in the "Estimated Level of Effort by Focus Area" table. Percentages maybe edited for the current and future annual report years. To make changes for previous annual reporting periods, please contact your Program officer.

You can export the grid for each table and change the number of records displayed in the page.

Resources – Reports

This section allows users another way to export information from PIER.

User Reports

This page allows you to export the data from the system into a csv, html, or doc file (more details below). To generate a Report, select the type of report from the "Choose Report to Run" dropdown, and then make selections from the other dropdowns as appropriate. Choose the type of report file you wish to generate and then click the "Run Reports" button.

Report Options:

CSV - MS-Excel format: This format is designed to be used with Microsoft Excel, and is best for doing calculations or producing graphics.

HTML table view: This format is similar to the .csv (and can be saved and opened in Excel). It works better with the text sections than .csv.

HTML list view: This is the primary format for most reports. It orients the data in a portrait format, making it easier to see in official reports. This file can be saved and opened in Word or Excel.

DOC - MS-Word format: This is the "List" view that is in a Microsoft Word(.doc) format. It is best for reports that will require some editing. NOTE: All final Annual and PRP reports will come from PIER, so be sure that any changes made in the Word document are reflected in the database.

Quick links reports available in the left navigation column include:

Annual Report,

Performance Progress Report,

Performance Review Panel Report, and

Focus Team Report

Coming Fall 2013: Public Search Page and Highlighting Impacts and Accomplishments

Soon, the public will be able to view data in PIER via a public search page. Note: Projects and fund records will not be visible until awarded by the NOAA Grants Office and the status changed to "awarded" in PIER.

Also, as part of the new website we will be highlighting impacts and accomplishments from PIER. When adding your impacts and accomplishments you will see a check box that says "Feature Live". Those impacts and accomplishments that are checked to feature live will be pulled to a page on our Programs section of the website that will highlight these and make them available to the public. Please make sure that you have reviewed the impact or accomplishment for readability, typographical errors and that it accurately represents your programs involvement. The 4 Rs format (Relevance, Response, Results and Recap) is suggested for both impacts and accomplishments. For more information on writing impacts, please see: http://seagrant.noaa.gov/other/admininfo/documents/guidance/Impact%20Statement%20Guidance_Revised_FINAL_2013.pdf. More detailed information will be provided prior to the public search page being active.