

# How to Add a "Partner" organization in PIER and the 90-2 Webform

January 2023

## Step 1 – Log into PIER and navigate to the Program Partners page. You will see the following screen.

- The left table holds all POTENTIAL "Partners" in PIER's database. There are nearly 17,000 to choose from.
- The right table is your program's CURRENT set of ProgramPartners (Ohio Sea Grant is pulled up as an example program). These are used in three ways: (1) to associate Partners or a PI's Affiliation on the 90-2 Webform or in PIER; (2) associate Partners on an Impact or Accomplishment in PIER; associate a Fund Source for a Leveraged Funding record.

The screenshot shows the NOAA PIER web application interface. At the top, there is a NOAA logo and the text 'NATIONAL OCEANIC AND ATMOSPHERIC ADMINISTRATION UNITED STATES DEPARTMENT OF COMMERCE'. A search bar for 'Search USA.Gov' is in the top right. The main header is 'PIER' with the URL 'pier.seagrant.noaa.gov'. Below the header, there is a navigation menu on the left with categories like 'PIER HOME', 'PLANNING - STRATEGIC PLAN ELEMENTS', 'IMPLEMENTATION - PROJECT MANAGEMENT ELEMENTS', and 'EVALUATION - ANNUAL REPORT ELEMENTS'. The main content area is titled 'Partners' and includes a sub-header 'The Current Program Partners list populates Partners drop-boxes in other sections (e.g., Projects or Impacts)'. There are two filter sections: 'Filter POTENTIAL Partners List By:' and 'Filter CURRENT Partners List By:'. Below these are two tables. The left table is 'Potential Program Partners' and the right table is 'Current NATIONAL SEA GRANT COLLEGE PROGRAM Program Partners'. Between the tables are 'Add Partner' and 'Remove Partner' buttons with arrows indicating the flow of data.

**Potential Program Partners**

	Select
(3) Select one affiliation (single-click on that cell), then hit "Add":	<input type="checkbox"/>
(California) KZO Sea Farms/Catalina Sea Ranch	<input type="checkbox"/>
(David) Willis Seafood	<input type="checkbox"/>
(Primary Code First)	<input type="checkbox"/>
@MrVantaztic Learning Blog, Jason Vanzant	<input type="checkbox"/>
'Opihi Monitoring Partnership	<input type="checkbox"/>
1. Division of Biological Sciences, University of California, San Diego	<input type="checkbox"/>
10,000 Lakes Aquaculture Inc.	<input type="checkbox"/>

**Current NATIONAL SEA GRANT COLLEGE PROGRAM Program Partners**

	Select
21 Agricultural Research Service (USDA, ARS)	Used
Absolute Vodka	Used
Agriculture Research Service (USDA, ARS)	Used
Akron Water Plant	Used
Alaska Sea Grant	Used
Alliance for the Great Lakes	Used
Alliance Water Plant	Used
American Rivers	Used
AmeriCorps	Used
Aqua Ohio	Used

**Step 2 – Search the left-hand table for the Organization you are interested in adding – click [Apply Filters].**

The search function looks up an exact string of characters, so multiple or broader queries are recommended because keywords may be scattered through the entire organization name (e.g. Michigan Department of Natural Resources may have a comma or be called DNR – search Department).

**Partners** Program: OH

The Current Program Partners list populates Partners drop-boxes in other sections (e.g., Projects or Impacts).

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**Filter POTENTIAL Partners List By:**

(Type) (Scale)

Text: Great Lake

Apply Filters Clear Filters Check All Uncheck All Edit Partners

Potential Program Partners	Select
(3) Select one affiliation (single-click on that cell), then hit "Add":	<input type="checkbox"/>
(California) KZO Sea Farms/Catalina Sea Ranch	<input type="checkbox"/>

Add Partner

Remove Partner

**Filter CURRENT Partners List By:**

(Type) (Scale)

Text:

Apply Filters Clear Filters Check All Uncheck All

Current NATIONAL SEA GRANT COLLEGE PROGRAM		Select
Program Partners		
21 Agricultural Research Service (USDA, ARS)	Used	<input type="checkbox"/>
Absolute Vodka	Used	<input type="checkbox"/>
Agriculture Research Service (USDA, ARS)	Used	<input type="checkbox"/>

- Select the Partner of interest and clic k [Add Partner]. This organization is now ready to use any all relevant look-up tables.

**Filter POTENTIAL Partners List By:**

(Type) (Scale)

Text: Great Lake

Apply Filters Clear Filters Check All Uncheck All Edit Partners

Potential Program Partners	Select
1854 Treaty Authority, Center for Great Lakes Literacy, Lake Superior National Estuary Research Reserve (US DOC, NOAA, NOS, NERRS), Minnesota Lake Superior Coastal Program, Wisconsin Sea Grant, Puerto Rico Sea Grant	<input type="checkbox"/>
American Great Lakes Ports Association and Its Members	<input type="checkbox"/>
Audubon Great Lakes	<input type="checkbox"/>
Buffalo State College Great Lakes Center	<input type="checkbox"/>
Center for Great Lakes Environmental Education	<input type="checkbox"/>
Center for Great Lakes Literacy	<input checked="" type="checkbox"/>
Center of Excellence for Great Lakes and Human Health (US DOC, NOAA, OAR, GLERL, CEGLHH)	<input type="checkbox"/>

Add Partner

Remove Partner

**Filter CURRENT Partners List By:**

(Type) (Scale)

Text:

Apply Filters Clear Filters Check All Uncheck All

Current NATIONAL SEA GRANT COLLEGE PROGRAM		Select
Program Partners		
21 Agricultural Research Service (USDA, ARS)	Used	<input type="checkbox"/>
Absolute Vodka	Used	<input type="checkbox"/>
Agriculture Research Service (USDA, ARS)	Used	<input type="checkbox"/>
Akron Water Plant	Used	<input type="checkbox"/>
Alaska Sea Grant	Used	<input type="checkbox"/>
Alliance for the Great Lakes	Used	<input type="checkbox"/>
Alliance Water Plant	Used	<input type="checkbox"/>
American Rivers	Used	<input type="checkbox"/>
AmeriCorps	Used	<input type="checkbox"/>
Aqua Ohio	Used	<input type="checkbox"/>

**Step 3 (IF NECESSARY) – If the appropriate record is not available, click on the [Edit Partners] button at the top of the POTENTIAL Partners table.**

You will then see the following screen. This is a table of all of PIER Organizations (i.e. Partners, PI Affiliations, Leveraged Fund Sources) – it is presented alphabetically by name, but can be filtered by Type, Scale, Status, and Update Time.

**Edit Partners** Display:

Filter By: (Type) (Scale) (Status)

Text:

ID	Name	Partner Type	Partners Scale	Status	Used Partner?	Program Partner?	User	Update Time
<input type="button" value="Edit"/>	17979	Unknown	Unknown	Awarded	True	True	dc upl 1.08	9/20/2017 3:40 PM
<input type="button" value="Edit"/>	24637 (3) Select one affiliation (single-click on that cell), then hit "Add":	Unknown	Unknown	Awarded	True	True	dwb	12/3/2021 5:52 PM
<input type="button" value="Edit"/>	18752 (California) KZO Sea Farms/Catalina Sea Ranch	INDUSTRY AND BUSINESS	Unknown	Awarded	True	True	dc uploader mod 2.1	5/11/2018 3:43 PM
<input type="button" value="Edit"/>	3978 (David) Willis Seafood	INDUSTRY AND BUSINESS	STATE	Awarded	False	True	Isaiah.Harmon	7/29/2011 2:11 PM
<input type="button" value="Edit"/>	24655 (Primary Code First)	Unknown	Unknown	Awarded	True	True	dwb	1/20/2022 12:02 PM
<input type="button" value="Edit"/>	22206 @MrVantaztic Learning Blog, Jason Vanzant	ACADEMIC INSTITUTION	LOCAL	Awarded	False	True	sh uploader mod 2.3	6/9/2020 5:59 PM
<input type="button" value="Edit"/>	14274 'Opihi Monitoring Partnership	NGO	STATE	Awarded	False	True	dc uploader1.05 4-19-89	4/20/2016 6:28 AM
<input type="button" value="Edit"/>	22377 1. Division of Biological Sciences, University of California, San Diego	ACADEMIC INSTITUTION	STATE	Awarded	True	True	sh uploader mod 2.3	6/12/2020 10:15 AM

- Click [Add New Partner] at the top of the table. The table will refresh and be organization by Update Time.

**Edit Partners** Display:

Filter By: (Type) (Scale) (Status)

Text:

ID	Name	Partner Type	Partners Scale	Status	Used Partner?	Program Partner?	User	Update Time
<input type="button" value="Delete"/> <input type="button" value="Cancel"/> <input type="button" value="Save"/>	25955	<input type="text" value="(Type)"/>	<input type="text" value="(Scale)"/>	<input type="text" value="(Status)"/>	False	False	DOUG.BELL	1/13/2023 12:54 PM
<input type="button" value="Edit"/>	25953 University of Minnesota Duluth (UMD), Department of Mechanical and Industrial Engineering	ACADEMIC INSTITUTION	STATE	Awarded	False	True	DOUG.BELL	1/11/2023 10:22 AM

- Enter the Name of your Organization and select its Type and Scale. When satisfied set its Status to “Submitted”. We have made it so that you can still edit the record when status is set as “Submitted” in case you realize a quick mistake.

**Edit Partners** Display:

Filter By: (Type) (Scale) (Status)

Text:

ID	Name	Partner Type	Partners Scale	Status	Used Partner?	Program Partner?	User	Update Time
<input type="button" value="Delete"/> <input type="button" value="Cancel"/> <input type="button" value="Save"/>	25955 THE University of Ohio State	ACADEMIC INSTITUTION	FEDERAL or NATIONAL	Submitted	False	False	DOUG.BELL	1/13/2023 12:54 PM

**Step 4 – Contact [oar.sg.info-admin@noaa.gov](mailto:oar.sg.info-admin@noaa.gov) to let admin know that a new organization requires approval.**

This is a manual quality control measure to avoid duplication and confirm the partner Type and Scale. When approved, return to the ProgramPartners page, search for the record of interest in the POTENTIAL partners list, and then Add Partner to the CURRENT Partners table.

## Partners

The Current Program Partners list populates Partners drop-boxes in other sections (e.a.. Projects or Impacts).

**Filter POTENTIAL Partners List By:**  
(Type) (Scale)  
Text: Ohio State  
Apply Filters Clear Filters Check All Uncheck All Edit Partners

Potential Program Partners	Select
Biological Resources Division, Ohio State (US DOI, USGS)	<input type="checkbox"/>
Ohio State University Research Foundation (OSU)	<input type="checkbox"/>
Ohio State University, Aquatic Research and Development Integration Program	<input type="checkbox"/>
The Ohio State University-Department of Evolution, Ecology, and Organismal Biology	<input type="checkbox"/>
THE University of Ohio State	<input checked="" type="checkbox"/>

**Filter CURRENT Partners List By:**  
(Type) (Scale)  
Text:  
Apply Filters Clear Filters Check All Uncheck All

Current NATIONAL SEA GRANT COLLEGE PROGRAM Program Partners	Select
21 Agricultural Research Service (USDA, ARS)	Used
Absolute Vodka	Used
Agriculture Research Service (USDA, ARS)	Used
Akron Water Plant	Used
Alaska Sea Grant	Used
Alliance for the Great Lakes	Used

Add Partner →

← Remove Partner