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.

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).

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

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: Default

Filter By: (Type) (Scale) (Status)
Text: ❓ [_____] Apply Text Filter | Clear All Filters | Add New Partner

	ID	Name	Partner Type	Partners Scale	Status	Used Partner?	Program Partner?	User	Update Time
Edit	17979		Unknown	Unknown	Awarded	True	True	dc upl 1.08	9/20/2017 3:40 PM
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
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
Edit	3978	(David) Willis Seafood	INDUSTRY AND BUSINESS	STATE	Awarded	False	True	Isaiah.Harmon	7/29/2011 2:11 PM
Edit	24655	(Primary Code First)	Unknown	Unknown	Awarded	True	True	dwb	1/20/2022 12:02 PM
Edit	22206	@MrVantaztic Learning Blog, Jason Vanzant	ACADEMIC INSTITUTION	LOCAL	Awarded	False	True	sh uploader mod 2.3	6/9/2020 5:59 PM
Edit	14274	`Opihi Monitoring Partnership	NGO	STATE	Awarded	False	True	dc uploader1.05 4-19-89	4/20/2016 6:28 AM
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: Default

Filter By: (Type) (Scale) (Status)
Text: ❓ [_____] Apply Text Filter | Clear All Filters | Add New Partner

	ID	Name	Partner Type	Partners Scale	Status	Used Partner?	Program Partner?	User	Update Time
Delete Cancel Save	25955	[_____]	(Type)	(Scale)	(Status)	False	False	DOUG.BELL	1/13/2023 12:54 PM
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: Default

Filter By: (Type) (Scale) (Status)
Text: ❓ [_____] Apply Text Filter | Clear All Filters | Add New Partner

	ID	Name	Partner Type	Partners Scale	Status	Used Partner?	Program Partner?	User	Update Time
Delete Cancel 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 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.