



Program Management

- **Programs monitored distinctly from their linked Projects**
 - * Start and End Dates span entire proposal or award period
 - * Individual *Project* years linked to single representative *Program* records
 - * Distinction between *Program/Projects* enable true to life monitoring
 - * Simple mouse-click retrieval of *Program* records by known P.I./Director
 - * Simple mouse-click retrieval of related *Project* records upon *Program* selection
 - * Due Dates (Progress & Financial Reports/Competing Applications) tracked in one place
 - * Streamlined management of multi-project applications (e.g. PPG/Training Grants) and awards
 - * Monitor umbrella Institutional Review Boards distinct from *Project* protocol approval records
- **Identify *Programs* on unfunded extensions**
- **Easily reassign *Program* records to alternate P.I./Investigator**
- **Pass *Program*-specific data to *Projects* when created/updated**
- **Programmatically control the Status of a *Program's* linked *Projects***
- **Monitor *Programs* on an as-needed basis**
 - * Maintain *Program* records only for investigators in your unit, or -
 - * Maintain outside investigator *Program* records that provide support to your investigators
 - * Signify support as Inside or Outside / elect whether support appears on unit-specific reports
 - * Correctly store and structure IMPAC elements (National Institutes of Health)
 - * Manage support from any funding agency, including institutional support
 - * Identify Gift/Unrestricted support to prevent reflection on Other Support reports

Project Management

- **Individual *Projects* managed distinctly from their linked *Program***
 - * *Project* Start and End Dates span a distinct year of support under a *Program*
 - * Monitor actual funding level for individual *Project* components of multi-project *Programs*
 - * Distinct assignment number fields store *Project* Application Type and Year of Support
 - * Enables proper display of NIH and Other Agency grant assignment numbers
 - * Simple mouse-click retrieval of *Participant* effort records upon *Project* selection
 - * Monitor *Project* Institutional Review Boards distinct from *Program* umbrella approval records
- **Easy identification of NIH- or Other Agency- assigned *Projects***
- **Precisely specify *Project* year of funding/requested support**
- **Capture *Project* Major Goals/Specific Aims for "Just-in-Time" reports**
- **Store/report center assignments with institution-specific formatting**
- **Distinct fields store Direct, Indirect, and Total Costs for *Project***
- **Concurrent display of linked *Program* data while viewing *Project***
- **Easily reassign *Project* records to alternate P.I./Investigator**


Personnel Management

- **Assign/categorize all unit-affiliated persons:**
 - * Type of Appointment (e.g. Primary/Secondary/Affiliate/Other)
 - * Department (e.g. Medicine/Pathology/Microbiology)
 - * Division (e.g. Hematology/Gastroenterology/Nephrology)
 - * Area (e.g. Smith Lab/Biodefense Lab/Administration)
 - * Category (e.g. Faculty/Staff/Graduate Student)
 - * Job Code (import institution job codes for assignment to *Person* records)
 - * Pay Group (Categorize pay schedules/check distribution reports)
- **Customize category options to match unit-specific needs**
- **Produce consistently formatted reports, including telephone and check distribution lists sorted by these categorical assignments.**
- **Assign *Person* records as *Participants* on managed sponsored or institutional *Projects* or applications**
- **Maintain additional contact data including:**
 - * Salutation (e.g. Dr./Mr./Mrs./Ms.)
 - * Last Name; First Name; Middle Name; & Full Name
 - * Address 1 & Address 2
 - * City/State/Postal Code
 - * Start Date (Track Academic Appointments)
 - * End Date (Monitor Appointment Expiration)
 - * Display (elect whether persons display on unit reports)
 - * Archive (remove persons from active status)
 - * Comments (provide remarks/notes unique to select persons)

Effort Management

- **Link *Participant* (Effort Records) to individual *Projects***
 - * Display/report personnel proposed/assigned to a specific *Project* or *Program*
 - * "Just-in-Time" (Other Support) reports consistent with NIH requirements
 - * Automatically update *Participant* records when *Project* elements change
- **Monitor approved and current effort commitments**
- **Track *Participant* effort involvement changes over time**
- **Readily view potential for significant effort reductions**
- **Monitor salary/fringe benefit expense by effort period**
- **Effort Percentage and Person Months commitments**
- **Reassign effort records to alternate *Projects* or *Programs***
- **Precisely identify investigator role on *Project***
- **Include comments for *Participant* involvement**

Extensive Reporting Capability

<i>Program Reports</i>	<i>Project Reports</i>	<i>Personnel Reports</i>	<i>Effort Reports</i>	<i>Funding Reports</i>	<i>Deadlines Reports</i>
*Specify criteria and produce reports of active, pending, committed, expired or unfunded <i>Programs</i> by Status	*Specify criteria and produce reports of active, pending, committed, expired or unfunded <i>Projects</i> by Status - including <i>Participants</i>	*Specify criteria and produce <i>Personnel</i> reports sorted alphabetically, or by assigned Department, Area, or Category	*Produce "Just-in-Time" Other Support Page reports in the precise format requested.	*Monitor funding levels from the National Institutes of Health with precision	*Report all <i>Projects</i> that are approaching their due dates for Progress Reports, Expenditure Reports, or Competing Applications
*Report <i>Programs</i> for investigators based on their Appointment Type	*Report <i>Projects</i> by <i>Program</i> Director or by <i>Project</i> Leader	*Report only <i>Personnel</i> who match a specified appointment type (e.g. Primary/Secondary)	 *Other Support Page can be produced showing Percent of Effort or Person Months (consistent with new NIH requirements)	*Select a fiscal year and immediately return all <i>Projects</i> awarded or committed	*Select a future date from the pop-up calendar, and click a single button to launch the report
*Report <i>Programs</i> for particular funding agencies	*Report <i>Projects</i> for particular funding agencies	*Report <i>Personnel</i> with an academic appointment at your institution	*Report all <i>Personnel</i> who receive support or were proposed on the selected <i>Program</i> or <i>Project</i>	*Select a future fiscal year to report all committed <i>Projects</i> anticipated to receive awards	*Report all details of the <i>Program</i> , including all expired and future years of support
*Include or exclude unrestricted/gift <i>Programs</i> from reports as desired	*Include or exclude unrestricted/gift <i>Projects</i> from reports as desired	*Report <i>Personnel</i> who are approaching their academic appointment expiration	*Report all <i>Programs</i> and assigned <i>Personnel</i> for a specified <i>Program</i> Director or <i>Project</i> Leader	*Detailed presentation of award information, including Direct, Indirect, and Total Costs	*Detailed presentation of award information, including Direct, Indirect, and Total Costs
*Report <i>Program</i> due dates including Progress Reports, Expenditure Reports, and Competing Renewal apps	*Report <i>Project</i> Start and End dates simultaneously with <i>Program</i> Start and End Dates	*Produce concise check distribution listings based on user-specified pay groups	*Produce reports detailing all sources of support for a selected or all unit-assigned personnel (invaluable aid during annual budgeting)	*Outside support flag restricts appearance of outside investigator support on your unit funding reports	*No more surprises! Know exactly when to request unfunded extensions, and avoid award delays
*Detailed presentation of Agency, Grant Identifier, and <i>Program</i> Descriptions	*Detailed presentation of award information, including Direct, Indirect, and Total Costs	*Produce detailed alpha-lists/personnel locators for display within the operating unit		*Promotes understanding and planning for funding changes in your unit	

Improve Office Organization & Effectiveness

- **Stop running to the file cabinet**
 - * Answer routine questions by clicking your way to the answer in PIER's Control Panel
 - * Drill-down with a mouse-click from Investigator to *Program*, *Project*, and all *Participants*
 - * Quickly append new *Persons*, *Programs*, *Projects*, and *Participants*
- **Get your entire group reading from the same page**
 - * Shared database environment - all users electronically access current information
 - * Enables segregation or centralization of Pre- and Post-Award responsibilities
 - * Quickly append new *Persons*, *Programs*, *Projects*, and *Participants*
- **Custom *Project* labels at the click of a button**
 - * Print directly to pre-purchased label templates
 - * Each label serves a specific *Project* filing task (e.g. Application, Award, Budget)
 - * Consistently label *Project* file contents for quick identification and order
- **Streamline deliverables with mailing labels**
 - * Generate *Person* mailing labels by Appointment Type, Department, Area, or Category
- **Labels bring order to *Personnel* files**
 - * Generate individual or entire group labels to organize H/R, *Personnel*, and Pay files