PURPOSE & TARGET AUDIENCE

Objective:

- Provide the most "need to know" topics about Piestar for the project start-up phase

Target audience:

- Principal Investigator

Also appropriate for:

Co-Principal Investigators

Week 0	Week 1	Week 2	Weeks 3-6	Later

Prepare:

- Read Attachment 2
- Take Canvas course on Ethical Clearances

Participate (or watch recording):

Week 1

1. Meet the team
2. Learn about financial reporting
3. **Get started in Piestar**

Week 2

4. Learn how to prepare or finalize the:

   - Open Data Plan (ODP)
   - Work plan (WP)
   - Results Framework (RF)
   - Environmental Monitoring & Mitigation Plan (EMMP)

Weeks 3-6

5. Development of Local Capacity Development (LCD) Plan

Later

Go deeper into:

6. **Piestar indicator and technical** reporting
7. Communications guidance

Submit (through Piestar):

By end of week 6
ODP, WP, RF, EMMP, LCD plan, Ethics course certificate

Today

WHAT IS PIESTAR?

- Piestar is an online data management and reporting platform designed to streamline reporting efforts required for large federal grants

- **Helps LSIL**: to monitor progress and facilitate reporting for multiple subawarded projects

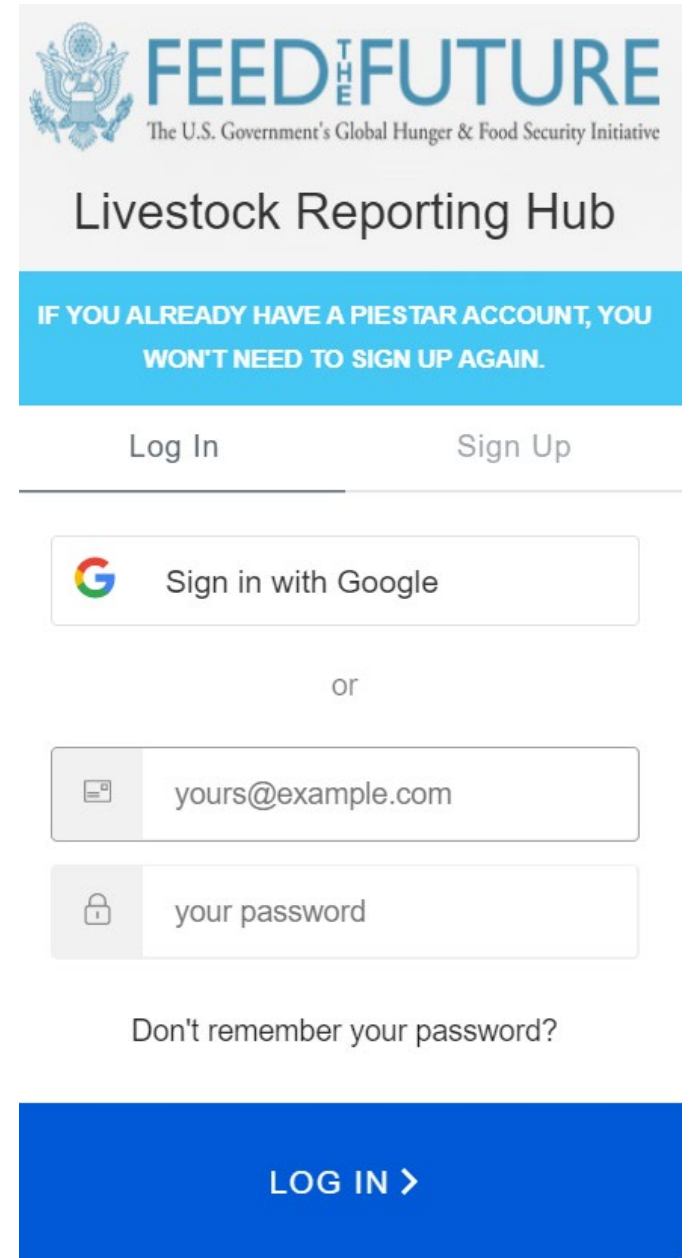- **Helps subawarded projects**: to upload project data in a systematic way

HOW WILL I USE PIESTAR?

Type of data to enter in Piestar	Frequency
Project Overview	Once at start of project
Personnel Demographics	Once at start of project
Ethical & Environmental Approvals	Once at start of project; updated yearly
Environmental Monitoring	Quarterly and as needed
Datasets	Yearly
Location Data	Yearly
Workplans	Yearly
Quarterly & Annual Reporting	Quarterly
Final Report	Once at end of project
Indicator Reporting	Quarterly
Requests	As needed

Many of these individual topics will be discussed in detail throughout the onboarding process

GETTING STARTED

- An email from Piestar has been sent to you inviting you to create an account

- Click on the link sent in the email to set up a password and activate your Piestar account (or login to your existing account)

- Inform LSIL

  - of any individuals who need Piestar access other than the PI or CoPIs

  - if any CoPIs do <u>not</u> want to be added to Piestar

MODULES

- Modules- online forms that will ask for multiple pieces of information on one topic

- There are two types of modules

  - Management Related- *This presentation*

  - Indicator Related- *Future presentation*

Project Management Modules

> **Project Overview**
>
> Personnel Demographics
>
> Ethical & Environmental Approvals
>
> Environmental Monitoring
>
> Datasets
>
> Location Data
>
> Workplans
>
> Quarterly & Annual Reporting
>
> Final Report

LSIL Custom Indicator Modules

> Trainings & Workshops
>
> Communication Products

ACCESSING MODULES

- Click on "Impact Modules"
- On the left-hand sidebar, you will see a menu of different modules

PROJECT MANAGEMENT MODULES

PROJECT OVERVIEW

- **Purpose:** To collect and store a brief overview of your project and categories of interest related to your project

- **How to use**: The ME will fill out this information and ask that you review it before the first official reporting period.

- **Frequency**: At the beginning of your project, one time.

Project Overview

Please review and complete the information below regarding your USA

Project Number	
Official Title	Livestock Systems Innovation Lab
Short Title	Livestock Systems Innovation Lab

Provide a short title used to reference this

PI Name	Erica Odera
Project Type	Site Default Project
Total Amount Awarded	900000
Project Dates	📅 10/01/2015

Start Date

Executive Summary

PERSONNEL DEMOGRAPHICS

- **Purpose:** To gather and store contact information and details for the personnel on your project with access to piestar

- **How to use**: Each individual with access to piestar for your project will fill in details about their name and contact information

- **Frequency**: At the beginning of your project, one time.

Personnel Demographics

Please answer the following questions regarding your current contact information and demogra

Participant Name & Demographics

Title	
	Optional. Example: Dr., Mr., Ms., etc. Max 10 characters.

Name	Erica	Middle
		Optional.

Sex	Please select...

Business Contact Information

Email	ericalin@ufl.edu

Position Title	
	Examples: Technician, Professor, Department Head, etc.

Institution	
	Specify the name of your home institution.

Street Address	

Street Address 2	
	Optional.

City	

ETHICAL & ENVIRONMENTAL APPROVALS

- **Purpose:** To ensure and keep on record that each project has all required ethical and environmental approvals before beginning

- **How to use**: As you obtain these approvals, upload them into this module

- **Frequency**: At the beginning of your project, and then updated only if these approvals change during the course of your project

Ethical & Environmental Approvals

The purpose of this module is to gather and store information about your project
start of your project. Should changes to these approvals be needed over the cou
place.

Ethical Approval Files

Please upload a **PDF** file of the certificate you received from attending the req

+ Upload File

Please upload all applicable approvals (in **PDF** format) showing that your proje

+ Upload File

Please upload all applicable approvals (in **PDF** format) showing that your proje

+ Upload File

Environmental Monitoring & Mitigation Plan

Please upload a **PDF** file of your project's final Environmental Monitoring & Mit

+ Upload File

ENVIRONMENTAL MONITORING

- **Purpose:** To collect and store the environmental monitoring activities your project carries out.

- **How to use**: Fill out the questions presented in this module. Describe details of the monitoring activity, as applicable.

- **Frequency**: Every quarter at minimum. If your project carries out more than one monitoring activity during a given quarter, simply add another entry.

Environmental Monitoring

The purpose of this module is to collect information on the environme you or your project team members carry out throughout the life of you activities planned as part of your project.

During this last quarterly reporting period, did your project carry ou

○ Yes
○ No

In the next quarterly reporting period, does your project plan to car

- Laboratory work and analysis
- Collecting or transporting samples of any kind
- Animal feeding trials or experiments
- Procuring, storing, creating, or distributing animals or animal feed
- Using pesticides, insecticides, or fertilizers
- Training and capacity development of individuals

○ Yes
○ No

[Save] [Save Draft]

DATASETS

- **Purpose**: To document and store your project's open data plan and facilitate yearly updates on this plan.

- **How to use**: Fill out the open data plan information as requested within this module at the start of your project. On a yearly basis indicate whether any changes are needed to this plan.

- **Frequency**: Once a year.

LOCATION DATA

- **Purpose**: To facilitate the collection of GPS coordinates of project activities across the project lifespan. This is required by USAID.

- **How to use**: Use the GPS template provided for your country and input GPS coordinate information for all locations where your project was active during the year. See the instruction sheet on the dashboard on how to use the GPS excel template.

- **Frequency**: Once a year.

Location Data

The purpose of this module is to gather information abo
helps the agency understand where activities of funde

There are two templates on the Piestar dashboard you
project works. Fill out this excel file using the instructio

Upload the completed "Location Data Template" excel

Review and Update of Location Data

What type of update are you reporting for the location da

○ This is the first time I am completing a location data upl

○ There are no changes to my location data for this year (

○ There are changes to my location data for this year (ple

Location Data File

Please upload an excel file of the location data for yo

+ Upload File

Mark as Complete   Save Draft

WORKPLANS

- **Purpose:** To document and store annual updates to your project's workplan.

- **How to use**: Upload your project's workplan as excel file (from the proposal refinement phase) *(Will be covered in a standalone onboarding session).*

- **Frequency**: Once a year.

Workplans

The purpose of this module is to facilitate the review of your projec Management Entity. You will need to review and revise this plan an

Note that workplans are based on the U.S. federal Fiscal Year (FY)

Please upload your workplan following two important timeframes:

- Within six weeks of subaward execution.
- By August 15 of each year your project is active.

Workplan

Please upload the workplan as an excel file based on the file use

+ Upload File

Workplan Changes

Use the text box to describe notable changes to your workplan, if app

Save   Save Draft

QUARTERLY & ANNUAL REPORTING

- **Purpose**: To collect and store your written quarterly and annual reports.

- **How to use**: Complete your written quarterly and annual reports in a word document using the template provided and upload the file under the appropriate section. Quarterly templates differ from the annual report.

- **Frequency:** Every quarter.

**More details about how to write these reports will come in a future session.

Quarterly & Annual Rep[

The purpose of this module is to collect your w

- Quarter 1: January 10
- Quarter 2: April 10
- Quarter 3: July 10
- Annual report: October 10

Please use the quarterly template provided on dashboard to prepare your annual report. Thes

Upload your report each quarter (with quarter 4

Quarterly & Annual Report Files

Upload your quarterly or annual report here.

+ Upload File

Save | Save Draft

FINAL REPORT

- **Purpose**: To collect your final end-of-project technical report.

- **How to use**: At the end of your project, complete your written final report using the template provided and upload the file.

- **Frequency:** At the end of the project, within 60 days of the end of the subaward agreement.

Final Report

The purpose of this module is to collect your written final report.

The due data of this report is 60 days after the project end date. document.

Note that the Management Entity will review the final report and

Final Report

Please upload your final report as a word document file.

+ Upload File

Mark as Complete   Save Draft

ANY QUESTIONS

OR

COMMENTS

SO FAR?

REQUESTS

- **Purpose**: To formally request approval to travel internationally, to purchase restricted commodities or equipment.

- **How to use**: Fill out as needed with sufficient lead time.

- **Frequency:**

  o **Equipment** and **Restricted Commodities**:
     ideally only once, at beginning of project, already initiated during proposal refinement process.

  o **Travel:**
     possibly multiple times per year
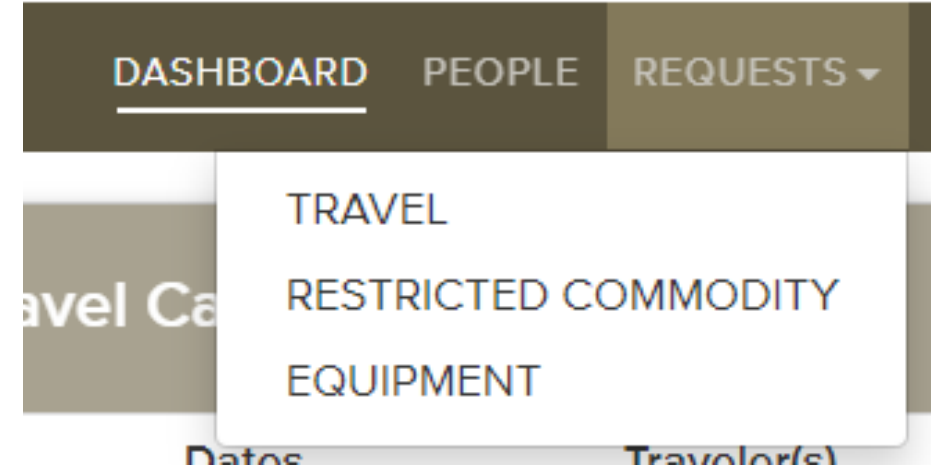
ACCESSING REQUESTS
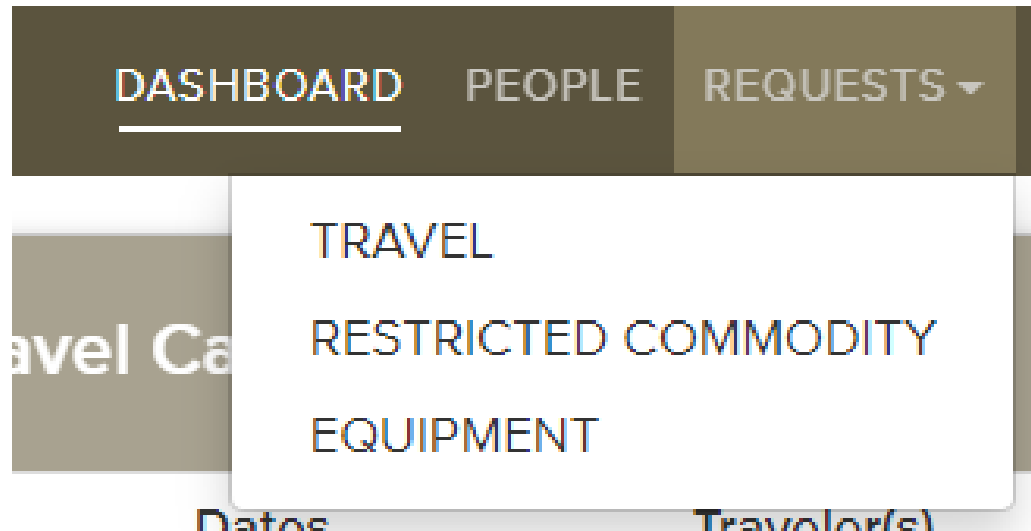
- Click on "Requests"

- From the drop-down menu you can select the desired type of request

- Click on each type of request to see instructions, areas for inputting information or uploading documents

WHY TALK ABOUT INTERNATIONAL TRAVEL REQUESTS NOW & IN DETAIL?

I.   You may need to do this very soon!

II.   Knowing up front what information is required makes it easy to do

III. Planning ahead helps to submit accurate requests in time so that delays and frustrations are avoided

TRAVEL IS A MULTI-STEP PROCESS:

1. Traveler or support person enters trip info in Piestar

2. PI needs to approve the travel request (TA) in Piestar

3. Piestar generates automated message to ME

4. ME reviews the TA and may solicit additional information

5. ME submits TA to USAID

6. Once USAID has responded, ME enters decision in Piestar

7. Piestar generates automated message to person who entered the travel request

8. **Tickets may only be purchased once an approval notification via Piestar has been received**

TA REQUEST THROUGH PIESTAR

At least 3 weeks prior to planned travel:

1. Traveler or support person enters trip info in Piestar

- Click on "Request" tab and select "Travel" from pull-down menu
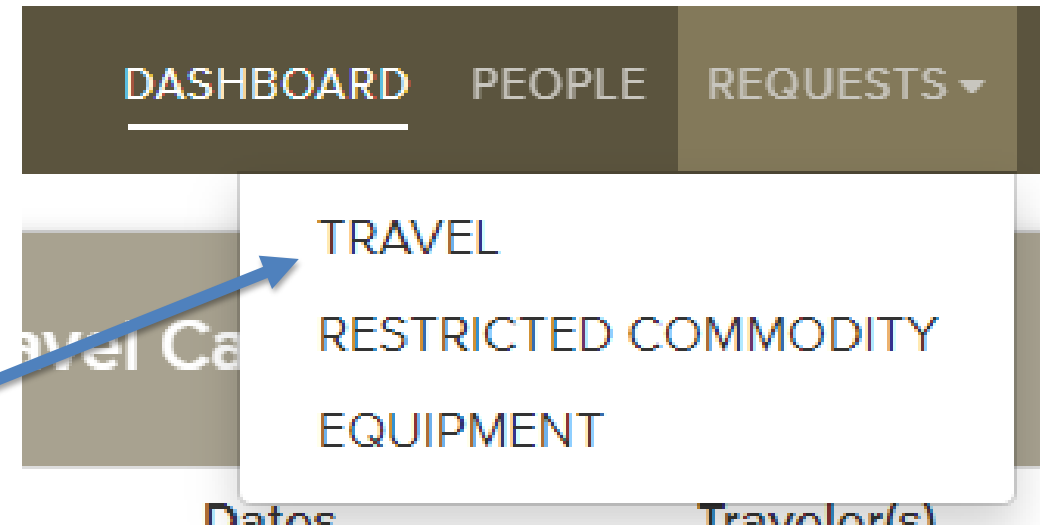
Then you will see a screen like this:

Travel Requests

The Livestock Systems Innovation Lab wants to support you in making your international travel as effective and successful as possible as well as provide any needed assistance in your communications with the USAID Mission.

Preauthorization by the Livestock Systems Innovation Lab management entity is required for all international travel at least three (3) weeks prior to the departure date. Please complete all fields indicated below to submit your request.

If you have any questions please contact the Lab at livestock-lab@ufl.edu or +1 352 392-2180.

ID	Traveler Name	Departure Date	Budget	Approval Status	Countries	Action	
T00524	Andrea Bohn	May 6, 2022	$	Approved	Rwanda	Travel Report	Edit
T00521	Andrea Bohn	May 22, 2022	$	Approved	Burkina Faso, Niger	Travel Report	Edit
T00520	Andrea Bohn	April 21, 2022	$	Approved	Nepal	Travel Report	Edit
T00488	Andrea Bohn	March 25, 2020	$	Cancelled	United States		Edit

New Travel Request

Powered by Piestar

- At the bottom you will see this green "New Travel Request" button. Click to get to the data entry screen:

Add Travel Request

The Livestock Systems Innovation Lab wants to support you in making your international travel as effective and successful as possible as well communications with the USAID Mission.

Preauthorization by the Livestock Systems Innovation Lab management entity is required for all international travel at least three (3) weeks pric indicated below to submit your request.

If you have any questions please contact the Lab at livestock-lab@ufl.edu or +1 352 392-2180.

Traveler Name	Andrea Bohn
Additional Travelers	Name / Institution
	Name / Institution
	Name / Institution
	Name / Institution
	Name / Institution
Departure Date	
Return Date	
Originating Country	United States
Visiting Countries	Please select...

List all countries you will be visiting on this trip.

Total Budget	$

Enter the total budget in whole U.S. dollars for this travel request.

Lodging Budget	$

Enter the budget in whole U.S. dollars.

M&IE Budget	$

Enter the budget in whole U.S. dollars for meals and incidental expenses.

DATA ENTRY

- Additional travelers can be added if more than one person is traveling to the same destination for the same purpose

- Flights from/to the United States must comply with the "Fly America" act.

- **Prior to data entry you should obtain a draft travel itinerary showing ticket costs**, ideally from a travel agent, that includes a statement about whether the flight is compliant with "Fly America" or "Open Skies", and if not, that no compliant option is available.

CALCULATING THE TRAVEL BUDGET

Total Budget	$ [_____] .00
	Enter the total budget in whole U.S. dollars for this travel request.
Lodging Budget	$ [_____] .00
	Enter the budget in whole U.S. dollars.
M&IE Budget	$ [_____] .00
	Enter the budget in whole U.S. dollars for meals and incidental expenses.
Flight Expenses	$ [_____] .00
	Enter the budget in whole U.S. dollars.
Other Expenses	$ [_____] .00
	Enter the budget in whole U.S. dollars.
	For foreign per diem rates, please visit https://aoprals.state.gov/web920/per_diem.asp
Budget Justification	[_____]

- "Total Budget" must be entered manually; this field does not auto populate

- Stay at or below the maximum allowable per diem rates for "Lodging/Accommodation" and for "Meals and Incidental Expenses (M&IE)" .

Consult: https://aoprals.state.gov/web920/per_diem.asp and select country and city/ies that apply

- **Budget Justification:**

    This is where you write down how the subtotals entered in the fields above were calculated. See example on next slide:

BUDGET JUSTIFICATION

Write an explanation about how the subtotals for the fields above were calculated.

Example:

Depart Gainesville 4/20 (via Seoul), depart Kathmandu on 4/29

Lodging - Kathmandu 5 nights, at $156.00 = $780
- Chitwan 2 nights, at $50.00 = $100 --> Subtotal: $880

M&IE - during travel 2 days, at $115.00 = $230
- Kathmandu 5 days, at $115.00 = $575.00
- Chitwan 2 days, at $90.00 = $180.00 --> Subtotal: $985.00

Flight - Delta and Korean Air 1 at $1,362.77 = $1,362.77
- Travel agent fee 1 at $60.00 = $60.00 --> Subtotal: $1,422.77

Other expenses: - Visa upon arrival 1 at $25.00 = $25.00
- Airport transfers 4 trips at $15.00 = $60.00
- Covid testing 2 * $60 = $120

TOTAL: $880 + $985 + $1,423 + $205 = $3,493

Per diem rates must be below or at max allowable rate

Flight estimates must be based on the uploaded travel itinerary

COMPLIANCE

Economy Class Airfare   ☐ I have verified that I am using economy class airfare.

Fly America Compliance | Please select...   ▼ |

As a USAID funding recipient, the Livestock Systems Innovation Lab is required to operate in compliance with federal regulations. This includes assuring that all management entity and subaward travel conforms with the Fly America Act. If some flights are operated by a foreign air carrier, you will need to select at least one exception reason.

Fly America Act compliant – ALL flights are on a U.S. flag air carrier   ▲
Fly America Act compliant – ALL flights are on a U.S. flag air carrier
Fly America Act compliant – all flights not on a U.S. airline are code-shared with a foreign U.S. flag carrier
Some flights are operated by a foreign carrier – SELECT EXCEPTION REASON(S) BELOW
Not Traveling By Air

Additional Information

Any additional information you would like to submit with this request. Optional.

Attachments   **➕ Upload Files**

Uploading a Travel Itinerary is required.

IF FLIGHT ITINERARY IS NOT FLY AMERICA COMPLIANT

Fly America Compliance   Some flights are operated by a foreign carrier – SELECT EXCEPTION REASON(S) BELOW ▾

As a USAID funding recipient, the Livestock Systems Innovation Lab is required to operate in compliance with federal regulations. This includes assuring that all management entity and subaward travel conforms with the Fly America Act. If some flights are operated by a foreign air carrier, you will need to select at least one exception reason.

Exception Reasons
(select all that apply)

- ☐ Foreign airline used has a code share agreement with a U.S. airline. Airline ticket should identify the U.S. flag air carrier's designator code and flight number (41 CFR Part 301-10.134).
- ☐ Air travel is provided under a bilateral or multilateral air transportation agreement to which the U.S. Gov't and the gov't of a foreign country are parties. See www.gsa.gov/openskies for those agreements (41 CFR Part 301-10.135(b)).
- ☐ No U.S. flag air carrier provides service on a particular leg of the route, in which case foreign air carrier service may be used, but only to or from the nearest interchange point on a usually traveled route to connect with U.S flag air carrier service (41 CFR Part 301-10.135(d)).
- ☐ Service on a foreign air carrier would be three hours or less, and use of the U.S. flag air carrier would at least double your en route travel time (41 CFR Part 301-10.135(f)).
- ☐ Travel between U.S. and another country. U.S. flag air carrier offers nonstop or direct service (no aircraft change) from your origin to your destination, but use the U.S. flag air carrier service would extend your travel time, including delay at origin, by 24 hours or more (41 CFR Part 301-10.136(a)).
- ☐ U.S. flag air carrier increases the # of aircraft changes outside of the U.S. by 2 or more (41 CFR Part 301-10.136(b)).
- ☐ U.S. flag air carrier extends your travel time by at least 6 hours or more.
- ☐ U.S. flag air carrier requires a connecting time of 4 hours or more at an overseas interchange point.
- ☐ Medical reason (i.e. to reduce the # of connections, etc). Please attach explanation. (41 CFR Part 301-10.138(b)(1)).
- ☐ To avoid unreasonable risk to your safety and has been approved by federal agency. (41 CFR Part 301-10.138(b)(2)).
- ☐ U.S. flag air carrier was unavailable. Provide documentation that no flights or seats were available (i.e. screen print out from travel booking website). (41 CFR Part 301-10.138(b)(3)).

SAFETY AND SECURITY

Security Awareness

Please select...

All American citizens are highly encouraged to register with the Smart Traveler Enrollment Program with the U.S. Department of State at https://step.state.gov/step/.

Registering with the appropriate embassy and staying up-to-date on the latest security developments in the country or countries you are visiting are both imperative actions to help assure your safety while in country.

COVID 19 RELATED:

☐ I am aware and in compliance with the COVID-19 related travel restrictions of my institution.

☐ I have read and am aware of the COVID-19 related precautionary measures at my travel destination as well as my place of residence.

☐ I will follow all regulations related to COVID-19 and I confirm that I am making this trip on my own free will.

Additional Information

Any additional information you would like to submit with this request. Optional.

UPLOAD THE TRAVEL ITINERARY FILE(S) AND THEN SUBMIT

Attachments
+ Upload Files

Uploading a Travel Itinerary is required.

Submit for Approval   Save as Draft

Submission will trigger the subsequent steps:

SUBSEQUENT STEPS

1. Piestar generates automated message to PI
unless the travel is for him/herself
(in that case it goes directly to the ME)

**2. PI approves the request via clicking button
at end of the email message**

3. Piestar generates automated message to ME
(see next slide)

Is Economy Class	Yes
Fly America Compliance	Fly America Act compliant – ALL flights are on a U.S. flag air carrier
Updated	March 29, 2022
Created	March 29, 2022
Request ID	T00520

You may choose to either authorize or deny this request.

[Authorize](#) [Deny](#)

From: support@mail.piestar.com on behalf of Livestock Systems Innovation Lab Support Team

To:

Subject:

Date: Tuesday, February 18, 2020 6:03:29 AM

[External Email]

[Name of person making the request] s travel request has been authorized by [Name of the PI]

Livestock Systems Innovation Lab support team
Phone: +1 (785) 727-1830
Email: support@piestar.com

Travel

Requested By [Name of person making the request]

Project Names

Traveler [Name of traveler]

SUBSEQUENT STEPS

4. ME reviews the request; ME may follow up for clarifications

5. ME submits the request to USAID

6. ME enters decision in Piestar once USAID has responded

7. **Piestar generates automated message to the person who entered the travel request**

REMEMBER

Tickets may only be purchased once an <u>approval</u> notification via Piestar has been received

- **Contact us at livestock-lab@ufl.edu if you have been waiting for it for more than 2 days.**

Keep a record of the Piestar Approval email

Expenses incurred for travel for which prior approval was not obtained are not reimbursable.

TRAVEL REPORTS ARE REQUIRED!

Upon travel completing date, Piestar will start send automated reminders to the person who entered the travel request until the report is submitted.

Report does not need to be long.

DON'T

DO

Don't wait until the last minute to request approval

Do not purchase tickets & do not fly internationally without prior approval
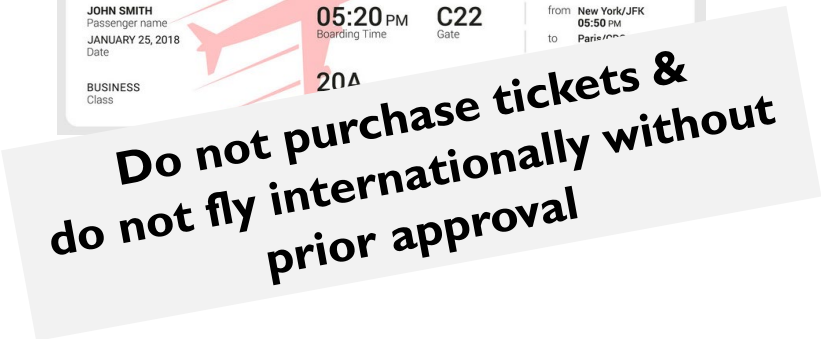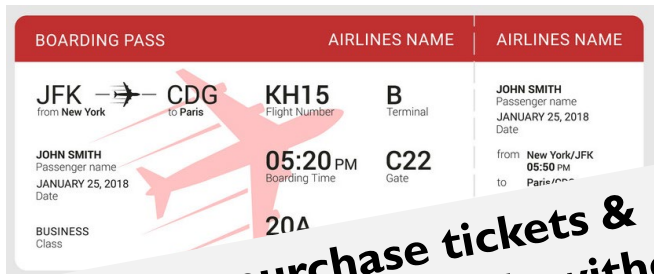
- **Submit the travel request at least 3 weeks prior to the intended departure date**
  - **Check that the PI approves the request quickly**

- **Carefully calculate the budget line items**
  - **Stay at or below the allowable rates** per country/region within the country you are traveling to

- **Purchase the ticket(s) only after you have received the approval notification via piestar**

QUESTIONS ?

NEED HELP?

- **Site-Related Questions**: support@piestar.com

- **Other Questions**: livestock-lab@ufl.edu

Week 0	Week 1	Week 2	Weeks 3-6	Later

Prepare:

- Read Attachment 2
- Take Canvas course on Ethical Clearances

Participate (or watch recording):

1. Meet the team
2. Learn about financial reporting
3. Get started in Piestar

⭐ 4. **Learn how to prepare or finalize the:**

- Open Data Plan (ODP)
- Work plan (WP)
- Results Framework (RF)
- Environmental Monitoring & Mitigation Plan (EMMP)

5. Development of Local Capacity Development (LCD) Plan

Go deeper into:

6. Piestar indicator and technical reporting
7. Communications guidance

Submit (through Piestar):

Next

By end of week 6
ODP, WP, RF, EMMP, LCD plan, Ethics course certificate