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National Institute of Standards and Technology  
Manufacturing Extension Partnership

**Effective As Of Quarter 2,  
2009**

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# Management Information Reporting Procedures

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National Institute of Standards and Technology  
**Manufacturing Extension  
Partnership**

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**U.S. Department of Commerce  
National Institute of Standards and Technology  
Gaithersburg, MD 20899-0001**

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## 1.0 Overview

NIST MEP has a number of legislative and contractual requirements for collecting data and information from the MEP centers. This information is used for the following purposes:

- Program Accountability
- Analysis and Research
- Reports to Stakeholders
- Continuous Improvement
- Knowledge Sharing
- Identification of Distinctive Practices

To support these needs, the “NIST MEP Management Information Reporting Procedures,” provides explicit instructions on how to complete applicable procedures. Changes to these procedures will be announced via email notifications to center reporting contacts and/or center directors. In addition, a listing of changes will be maintained on the MEP Source for Centers site (<https://www.mepcenters.nist.gov>).

This section discusses briefly the procedures. The document is divided into four broad categories as follows:

- 1) Prerequisites, Section 2.0, are the first set of procedures to be carried out prior to completing any of the data submission procedures. Three major steps make up the prerequisites category and these are complemented by four procedures (Sections 2.1 to 2.4). These steps and complementary procedures are as follows:
  - a) Check that the assumptions are true in Section 2.1.
  - b) Obtain an individual account to the MEP Source for Centers site. Refer to Section 2.2, User Registration for the MEP Source for Centers for specific details.
  - c) Login and access the Center Information Page (CIP) of the MEP Source for Centers, used to manage the flow of information between NIST MEP and the center. Refer to Section 2.3, NIST MEP Source for Centers Web Site and Center Information Page for specific details.
  - d) Assign users access to specific sections of the Center Information Page for the purpose of composing, deleting, reviewing, editing, and reading center related reporting information. Refer to Section 2.4, Access Control for the Center Information Pages for specific details.
- 2) Quarterly Data Submissions, Section 3.0, is the second of the aforementioned categories and is the main piece of the center reporting process. There are thirteen required submissions and one optional submission in this category:
  - a) Center Information (refer to Section 3.2);
  - b) Clients [Optional] (refer to Section 3.3);
  - c) Projects and Events (refer to Section 3.4);
  - d) Progress data (refer to Section 3.5);
  - e) Operating Plan (refer to Section 3.6);
  - f) Progress Narrative (refer to Section 3.7);

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- g) Partners (refer to Section 3.8);
  - h) Affiliates (refer to Section 3.9);
  - i) Board of Directors (refer to Section 3.10);
  - j) Locations (refer to Section 3.11);
  - k) Staff (refer to Section 3.12);
  - l) Center Contacts (refer to Section 3.13);
  - m) Success Stories (refer to Section 3.14); and
  - n) State Funding Partners (refer to Section 3.15).
- 3) Client Impact Survey, Section 4.0. Since 1996, NIST MEP has sponsored a nationwide survey of clients of the manufacturing centers it funds. The survey asks clients to comment on the impact on their business as a result of the services provided by their local center. NIST MEP sponsors an impact survey of manufacturing extension center clients for two purposes: 1), to collect national aggregate information on program performance and impact for national stakeholders; and 2), to provide center specific impact information.
- 4) Supporting Procedures and Appendices contain reference information to include:
- a) Section 5.0, (Appendix A) MEP Contact Information provides a convenient list of NIST MEP contact names, telephone numbers, and addresses by subject matter.
  - b) Section 6.0, (Appendix B) Output Reports includes procedures for accessing the center performance reports and information.
  - c) Section 7.0, (Appendix C) Definitions provides definitions for key terms related to the MEP system.
  - d) Section 8.0, (Appendix D) Allowable Reporting Codes.

## 2.0 Prerequisites

The prerequisites for the Management Information Reporting Procedures are Assumptions, User Registration, Accessing the Source for Centers and Center Information Pages, and Access Control. Each is discussed in the sections that follow.

### Assumptions

The following procedures contained herein make a number of assumptions about the resources available to the individual using this document and their capabilities. Where appropriate the assumptions are identified at the beginning of each procedure. The following are those assumptions, which are considered to be fundamental to the majority of the procedures.

- 1) Centers use a current Internet browser. NIST MEP supports Internet Explorer v5.5 or newer. Other browsers may be used (Netscape Navigator, Firefox, Safari), though some functionality may not work. The following conditions must be met:
  - a) The browser must be Java-enabled using Sun's Java 2 version 1.4.1 or higher. Refer to Sun's site at (<http://java.sun.com>) for more information on how to download and install the Java 2 Runtime and plug-in. Refer to the browser's help files for information on how to enable Java.
  - b) The browser must be capable of accessing secure sites using the domestically available strong (128-bit) encryption. Refer to the browser's help files for more information about accessing secure sites.
  - c) Your browser or firewall does not block popup windows. Blocking popup windows will interfere with the functionality of the Center Information Pages. To allow specific web sites to use pop-ups, while blocking all others, you can add specific web sites to the list of allowed sites. A troubleshooting document is available to help users setup pop-up blocker functionality. Contact MEP at (301) 975-4778 to receive a copy of this document. For more information consult the help files for your browser or firewall by searching on Privacy & Security Preferences or Popup Windows.
  - d) The browser must have cookies enabled. Refer to browser's help files for more information on how to enable cookies.
- 2) It is assumed that the user is familiar with browsing a Web site and ideally, the MEP Source for Centers Web site: <https://www.mepcenters.nist.gov>.

For any specific questions about this section, please refer to Section 5, MEP Contact Information.



## User Registration

Members of the MEP System, who have not already done so, should register to access the site. Please allow up to two business days to receive confirmation of your account approval. After receiving your confirmation you will be able to enter the site. Users can also have access to the MEP University Learning Center site:

[http://www.mepulearningcenter.com/kc/login/login.asp?kc\\_ident=kc0001](http://www.mepulearningcenter.com/kc/login/login.asp?kc_ident=kc0001), using the same login credentials, but one additional business day is required to process MEPU accounts.

### 2.2.1 Procedures

Access to the MEP Source for Centers is controlled through the user account. The user account will also be used to submit all information to NIST MEP. Procedures for obtaining a user account are below.

#### Obtaining a User Account

Individual users can obtain their user account login name and password by registering for the MEP Source for Centers. It will take no longer than two business days to receive your email confirmation to access the MEP Source for Centers. The delay is necessary to ensure only members of the system are provided access to the site.

The registration process is as follows:

1. Go to location <https://www.mepcenters.nist.gov> using your Internet browser.
- 2) Click on the **Register Now** link, as shown in Figure 2.2-1.

Figure 2.2-1: MEP Source for Centers - Splash Screen

The screenshot shows the splash screen for the MEP Source for Centers. At the top, there are logos for the Manufacturing Extension Partnership and NIST. Below the logos is a navigation bar with links for "Register Now", "Registration Help", and "NIST MEP Public Web Site". The main content area features a "WARNING" section with a red box highlighting the "Click here to register for the MEP Source for Centers" link. Below the warning is a checkbox for agreeing to the NIST MEP SFC Acceptable Use Policy. There are input fields for "User Name" and "Password", followed by "Login" and "Reset" buttons. At the bottom, there is a footer with contact information for assistance.

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The registration form, as shown in Figure 2.2-2 will appear.


- 3) Fill in the requested information. You must provide the required information for fields that have the green "R" icon  to be able to proceed with your registration. Please refer to Table 2.2-1 for detailed descriptions and examples of the items contained within the form.

Figure 2.2-2: Registration Form provides information needed to access the website.

Figure 2.2-2: Registration Form (continued)

- 4) Once the registration record is submitted, you will be asked to review the information you submitted. If the information is not correct you will be able to edit it, resubmit, and confirm again. See Figure 2.2-3 for more information about reviewing your registration information.

Figure 2.2-3: Source for Centers Registration Review Screen

### Source for Centers - Registration Review

You have submitted the following information. If it is correct, press the "Submit Registration" button. If it is incorrect, press the "Modify Record" button.

<b>Name</b>	
First Name: <input type="text"/>	Mary
Last Name: <input type="text"/>	Smith
Title: <input type="text"/>	Manufacturing Specialist
<b>Contact Information</b>	
Address 1: <input type="text"/>	111 W. East St.
Address 2: <input type="text"/>	Suite 230
City: <input type="text"/>	Anchorage
State: <input type="text"/>	AK
ZIP: <input type="text"/>	99501
Email: <input type="text"/>	mary.smith@noalaska.net
Phone: <input type="text"/>	555-555-5555 Ext. 45
Cell: <input type="text"/>	555-632-8956
Fax: <input type="text"/>	555-897-5126
Pager: <input type="text"/>	
<b>Account Information</b>	
Account Type: <input type="text"/>	Center
<p style="margin: 0;"><b>About Account Types</b></p> <p style="margin: 5px 0 0 20px;"><b>NIST MEP:</b> NIST MEP Gaithersburg staff, including those with IPA (Intergovernmental Personnel Act) assignments and students.</p> <p style="margin: 5px 0 0 20px;"><b>Center:</b> Personnel that are either employees or partners (via a long-term formal agreements) of a center and carry out their duties in the name of that center. These people will appear in the Staff Directory with their designated center. Note: These accounts must be sponsored and approved by a center.</p> <p style="margin: 5px 0 0 20px;"><b>Other:</b> Other center-related personnel such as employees of center host organizations, 3rd-party service providers (w/o a long-term formal agreement), and center board members. Other NIST MEP-related personnel such as NIST MEP advisory board members, state government officials, non-MEP divisions of NIST, non-NIST federal agencies, NIST MEP contractors, and NIST MEP trade associations (e.g., The Modernization Forum). These accounts must be sponsored and approved by either NIST MEP or a center.</p>	
Affiliation or Sponsor's Organization: <input type="text"/>	Alaska Manufacturing Extension Partnership
Sponsor's Name: <input type="text"/>	<input type="radio"/> if Account Type is "Other"
Your Organization Name: <input type="text"/>	<input type="radio"/> if Account Type is "Other"
<p style="margin: 0;"><b>Note:</b> Please remember the username and password you have chosen. You will be notified shortly when your account is active. The Department of Commerce Password Policy requires all Source for Centers users to change their password every 90 days.</p>	
User Name: <input type="text"/>	Smith_Mary
Password: <input type="password"/>	*****

5) After registration information is confirmed, click on the **Submit Registration** button. A successful submission will generate the following confirmation message shown in Figure 2.2-4 below.

**Note:** It will take no longer than two business days to receive your email confirmation to access the MEP Source for Centers. The delay is necessary to ensure only members of the system are provided access to the site.

Figure 2.2-4: Registration Confirmation Screen

[Back to Login](#)

- Registration has been successfully submitted.

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**2.2.2 Field Descriptions for the User Account**

Table 2.2-1: Field Codes for Registration Form.

Field Name	Required?	Instructions	Example
First Name	Yes	Enter your first name. If you commonly go by a nickname, enter that name.	Kim instead of Kimberly.
Last Name	Yes	Enter your last name or family name.	Smith
Title	Yes	Enter your job title or job function.	President
Address 1	Yes	Enter your street address for your organization, center, or agency.	123 Main Street
Address 2		Enter your room or suite for your organization, center, or agency.	Room 210 or Suite 3490
City	Yes	Enter the city for your organization, center, or agency.	Gaithersburg
State	Yes	Choose the state for your organization, center, or agency from the picklist.	MD - Maryland
ZIP	Yes	Enter the five-digit or nine-digit zip code for your organization, center, or agency.	20899
E-mail	Yes	Enter a valid Internet e-mail address.	jdoe@anycompany.com
Phone	Yes	Enter a valid phone number and extension	(555) 123-4567
Ext.	No	Enter your phone number extension	1234
Cell	No	Enter your cellular phone number.	(555) 670-1290
Fax	No	Enter your fax number.	(555) 123-4560
Pager	No	Enter your pager number.	(555) 281-2876
Account Type	Yes	Choose on the appropriate type from the drop-down list.	<ul style="list-style-type: none"> <li>NIST MEP: MEP staff members employed by NIST, including those with IPA (Intergovernmental Personnel Act) assignments and students.</li> <li>Center: Personnel that are either employees or partners (via a long-term formal agreement) of a center and carry out their duties in the name of that center. Note: These accounts must be sponsored and approved by a center.</li> <li>Other: Other center-related personnel such as employees of center host organizations, affiliate providers (without a long-term formal agreement), and center board members. Other NIST MEP-related personnel such as NIST MEP advisory board members, state funding partners, non-MEP divisions of NIST, non-NIST federal agencies, NIST MEP contractors, and NIST MEP trade associations (e.g., The Modernization Forum). Note: These accounts must be sponsored and approved by either NIST MEP or a center.</li> </ul>
Affiliation or Sponsor Organization	Yes	Choose on the appropriate affiliation from the drop-down list.	MEP or Delaware Valley Industrial Resource Center
Sponsor's name	Yes if user type is other; otherwise No	If account type is Other, enter your sponsor. This must be the name of either a member of NIST MEP or a member of a center. This field is only required when you choose your account type as other in the field above.	Carroll Thomas would be entered for the NIST MEP contractor administration MEP University. John Doe would be entered for a board member or state funding partner.
(Your)	Yes if user type is	If account type is other, enter your organization name. This	New York State Science and Technology Foundation

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Field Name	Required?	Instructions	Example
Organization's Name	other; otherwise No	could be your company, association, or agency name. This field is only required when you choose your account type as other in the field above.	
User Name	Yes	Enter the user name you would like to use on the Source for Center.	Manufacturing Hero
User Password	Yes	Enter the password you would like to use on the Source for Center. Passwords must contain at least  All passwords must have at least 8 non-blank characters, must contain at least 2 of the following: one alphabetic character, one numeric character, or one non-alphabetic and non-numeric character (e.g !, %, &, etc.). Do not use patterns, birthdays, children names or pet names.	llove2Help
Re-enter password	Yes	Re-enter your password for verification.	llove2Help

For any specific questions about this section, please refer to Section 5.0, for MEP Contact Information.

## Accessing the NIST MEP Source for Centers Web Site and Center Information Pages

The Center Information Page, on the MEP Source for Centers, is the primary mechanism that centers use for Quarterly Reporting. The Center Information Page facilitates the exchange of information between the centers and NIST MEP. The procedure explained below will provide MEP centers detailed instructions on how to access the MEP Source for Centers Web site and Center Information Page.

### 2.3.1 Procedure

The following procedure will provide step-by-step instructions for accessing the MEP Source for Centers and Center Information Page. If there are any questions regarding this procedure, please see the MEP Contact Information section (Appendix A, Section 5.0) of this document.

Go to location <https://www.mepcenters.nist.gov> using your Internet browser.

2. The MEP login screen will be shown. Users are required to check the checkbox to indicate agreement with NIST MEP Source for Centers Acceptable Use Policy and enter their username and password and click Login.

Figure 2.3-1: MEP Source for Centers – Log-in Screen

**Hollings Manufacturing Extension Partnership**  
Source for Centers

**NIST**  
National Institute of Standards and Technology

Provide Information, decision support & Implementation assistance to smaller manufacturing firms in adopting new, more advanced manufacturing technologies, techniques and business best practices

[Register Now](#) | [Registration Help](#) | [NIST MEP Public Web Site](#)

**WARNING**

This is a National Institute of Standards and Technology (NIST) computer system. NIST computer systems are provided for the processing of official U.S. Government information only. All data contained within NIST computer systems is owned by NIST or has been obtained by NIST from a private party and is PROTECTED UNDER THE TRADE SECRETS ACT, and may be monitored, intercepted, recorded, read, copied, or captured in any manner and disclosed in any manner, by authorized personnel. There is no right of privacy in this system. System personnel may disclose any potential evidence of crime found on NIST computer systems to appropriate authorities. USE OF THIS SYSTEM BY ANY USER, AUTHORIZED OR UNAUTHORIZED, CONSTITUTES CONSENT TO THIS MONITORING, INTERCEPTION, RECORDING, READING, COPYING, CAPTURING, and DISCLOSURE OF COMPUTER ACTIVITY.

Check the box to indicate your agreement with the statement above, the NIST MEP SFC Acceptable Use Policy, and to login.

User Name:

Password:

For assistance using the MEP Source for Centers please contact [webmaster@mep.nist.gov](mailto:webmaster@mep.nist.gov) or call the MEP HelpLine 301-975-4778.

Web Build 652-360-P

NIST is an agency of the U.S. Commerce Department: [Privacy statement](#) / [security notice](#) / [accessibility statement](#) | [Disclaimer](#) | [FOIA](#)

**Check the box, enter username and password and Click login button to login. Clicking Reset button will remove username and password information.**

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- Once logged onto the MEP Source for Centers, the Home Page will appear. To submit information to NIST MEP, Click on the Center Information Pages link from the top menu bar. See Figure 2.3.3 below.

Figure 2.3-3: Home Page of the MEP Source for Centers

**Hollings Manufacturing Extension Partnership**  
 Source for Centers

NIST  
 National Institute of Standards and Technology

Home CIP Communities Knowledge Skills Successes Conferences Polls My Account Logout

**MEP System**  
 09  
 MEP NATIONAL CONFERENCE

- MEP University
- SSTI State Facts
- SSTI State Facts
- Tech Based Economic Development
- RFID Readiness Assessment Tool
- eScan Security Tool
- MEP Staff Phone List
- QuickList - List of Centers
- Manufacturing News
- MEP Meeting Center
- Green Suppliers Network - Public
- SFC Access Statistics
- Communities of Practice
- Leadership™ Online

**Knowledge Base**  
 Knowledge Base Ask a Question  
 review the latest submission and know the answer:

**MEP Calendar (60 Days)**  
 All Events  
 Coming MEP and Center Events

**Select Center Information Pages (CIP)**

Search Users  
 (Example: 'John Dow' or 'John D\*')

**Skills Directory**  
 Find MEP staff with specific industry and discipline experience

**New Community Submissions**  
 Communities Home  
 Search CoP  
 Read recent posting to Communities of Practice (CoP). Share your knowledge with the MEP system. Announcements, Events, Forums, Resources:

- Final Survey Response Rate**  
 Announcement in Reporting and Evaluation by Christopher Carbone modified 02/18/2009
- State Fiscal Stabilization Fund**  
 Document in Sustainability by Montana Mallett modified 02/17/2009
- Client Coaching**  
 Announcement in Center Directors by Kenneth Voytek modified 02/17/2009
- Client Coaching**  
 Announcement in Reporting and Evaluation by Kenneth Voytek modified 02/17/2009
- Tech Scouting Light Webinar** (Date: 02/17/2009)

**March, 2009**

- 03/02/2009 at 08:00 AM (ET)  
**Next Lean Product Development Training Series: GS401 and GS402**  
 The next Lean Product Development GS401 Workshop will be held on March 2-4, 2009 in Cleveland, Ohio, sponsored by MAG...
- 03/02/2009 at 10:00 AM (ET)  
**MEP Staff Meeting**  
 Tab Wilkins will present a success story.
- 03/03/2009 at 02:00 PM (ET)  
**Webinar - Highlights of Recent Survey Process Changes and New Center Survey Management Tools**  
 If you are responsible for your centers' survey confirmation, this webinar is a must for you. We will discuss recent sur...
- 03/04/2009 at 11:00 AM (ET)  
**Intro to IP Webcast: Trademarks**  
 TM 130 Course Description This webcast workshop series will provide a basic overview of Intellectual Property topics an...
- 03/09/2009 at 10:00 AM (ET)  
**MEP Roundtable - Growth Services**  
 Presenters: Mike Simpson and Kari Reidy
- 03/09/2009 at 12:00 PM (ET)  
**Growth Services Webinar - Update on EWW 2009**  
 Help All The east growth services webinar will

**System News**

- (1) DRAFT NIST MEP Sustainability Inventory is now posted in the Sustainability CoP documents section.**  
 Announcement in Sustainability by Alex Folk modified 02/11/2009
- CHANGE TO GSN PRICING STRUCTURE - Effective Immediately**  
 Announcement in Sustainability by Alex Folk modified 12/12/2008
- (8) New Survey Instrument Now Available**

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4. The Center Information Pages will be shown as in figure 2.3-4 below.
5. Click on your Center's name – please note the center ID number in parenthesis next to the name. This ID will be used throughout our system and you will find it visible on numerous forms and reports.
6. Note the Logout link below. It is important to logout of the Source for Centers website rather than closing your browser.

Figure 2.3-4: Center Information Page, Center Links

The screenshot shows the website header with the logo for the Manufacturing Extension Partnership and NIST. The main navigation bar includes links for Home, CIP, Communities, Knowledge, Skills, Successes, Conferences, Polls, My Account, and Logout. The main content area is titled "Center Information Pages" and lists 30 manufacturing centers with their respective IDs in parentheses. Two callout boxes are present: one pointing to the "Logout" link in the navigation bar with the text "Click here to logout of the Source for Centers website.", and another pointing to the "Indiana MEP - Purdue Technical Assistance Program (177)" link with the text "Click on your center's name to open your Center Information Pages."

Center Name	Center ID
Alabama Technology Network	(165)
Alaska Manufacturing Extension Partnership	(222)
Arizona Manufacturing Extension Partnership	(216)
Arkansas Manufacturing Solutions	(173)
California Manufacturing Technology Consulting	(168)
Catalyst Connection	(172)
Chicago Manufacturing Center	(164)
Colorado Association for Manufacturing and Technology	(186)
Connecticut State Technology Extension Program	(155)
Corporation for Manufacturing Excellence (Manex)	(204)
Delaware Manufacturing Extension Partnership	(188)
Delaware Valley Industrial Resource Center	(175)
Florida Manufacturing Extension Partnership	(163)
Georgia Manufacturing Extension Partnership	(167)
Hawaii HTDC- MEP	(217)
Idaho TechHelp	(201)
Illinois Manufacturing Extension Center	(198)
Indiana MEP - Purdue Technical Assistance Program	(177)
Iowa Center for Industrial Research and Service	(193)
Kentucky Manufacturing Assistance Center	(200)
Maine Manufacturing Extension Partnership	(174)
Manufacturers Resource Center	(194)
Manufacturing Extension Partnership of Louisiana	(208)
Manufacturing-Works	(196)
Maryland Technology Extension Service	(184)
Massachusetts Manufacturing Extension Partnership	(182)
Michigan Manufacturing Technology Center	(161)
Mid-America Manufacturing Technology Center	(191)
Mid-Pennsylvania Manufacturing Extension Partnership	(154)
Minnesota Technology Inc.	(156)
Mississippi Technology Alliance	(158)
Missouri Enterprise	(169)
Montana Manufacturing Extension Center	(205)



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7. Click on the appropriate link for the information you are submitting. For detailed instructions on how to submit the information, refer to the relevant section in this document (Section 3.0, Quarterly Data Submissions).

Figure 2.3-5: Center Information Page, Home Page

The screenshot displays the website for the Hollings Manufacturing Extension Partnership, specifically the Center Information page for the Alabama Technology Network (165). The page features a green header with the organization's name and logos for the Manufacturing Extension Partnership and NIST. A navigation menu is located below the header, listing various sections like Home, CIP, Communities, Knowledge, Skills, Successes, Conferences, Polls, My Account, and Logout. The main content area is titled "Alabama Technology Network (165) Center Information" and is organized into three main sections: "General Information" with links for Center Information, Locations, Contacts, and Staff; "Center Management Information" with links for Clients, Partners, Projects and Events, Affiliates, Progress Data, Board of Directors, Operating Plan, Reports, Progress Narrative, Success Stories, and State Funding Partner Documents; and "Other Links" with links for Quarterly Reporting Status, Manage Role Access, and Survey Confirmation. A footer at the bottom of the page provides a disclaimer: "NIST is an agency of the U.S. Commerce Department: Privacy statement / security notice / accessibility statement | Disclaimer | FOIA".

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### Access Control for the Center Information Pages

A strictly defined set of criteria has been developed to ensure that only those center employees or partners who need access to this section of the Web site are granted access. The center employee with the “Center Reporting Role” assigns the user roles. Access control is implemented for the Center Information Pages by assigning the user roles that are discussed below.

The basic process for the Center Director or Center Director’s delegate to assign or change user roles is as follows:

The Center Director, or delegate, will be assigned the “Center Reporting Role” by NIST/MEP. The “Center Reporting Role” is the vehicle that is used to create the user roles to submit, edit, and read information on the MEP Source for Centers.

The Center Director or delegate shall grant or authorize center members’ access through an automated approval process. The center employee assigned the “Center Reporting Role” will submit all information.

The center member that is responsible for submitting information to NIST MEP will then log onto the MEP Source for Centers using his or her user account login name and password.

#### User Access Roles

The Center Director, or delegate, will assign appropriate roles to registered center staff (users). These center staff members must be registered on the MEP Source for Centers before roles are assigned. Center staff may be assigned one or more of the following roles given in table 2.4-1 below. User access levels, and the roles and responsibilities are described below in tables 2.4-2 and 2.4-3.

Table 2.4-1: User Access Roles Descriptions







Role	Description
Center Management	Ability to view restricted documents and run reports needed for the management of the center such as NIST MEP performance reports.
Center Reporting	Ability to assign roles for the center, submit all records to meet NIST quarterly reporting requirements, and verify all records to meet NIST quarterly reporting requirements.
Center Viewer	Ability to view restricted documents including Progress Data, Progress Narrative, Partners, Affiliates, Board of Directors, and Reporting Status.
MEP Source for Center User <b>(Not visible to centers)</b>	Default access to the site. This role has no special access or privileges associated with it. NIST MEP automatically assigns this role to all registered users.

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























































































- User access levels are described in Table 2.4-2 below.

Table 2.4-2: User Access Level Descriptions

Access Level	Description
 Compose	Can create a new record.
 Delete	Can delete a record.
 Edit	Can read and change existing information for the center.
 No Access	Cannot compose, edit, delete, read, or review information.
 Read	Can read existing information about the center, but cannot compose, delete, edit, or review information.
 Review	Can approve information submitted to NIST MEP in addition to reading and changing existing information for the center.

The user roles, responsibilities, and access levels for each role are presented in Table 2.4-3.

Table 2.4-3: User Roles

Center Information Page Section	ROLES			
	Center Management Role	Center Reporting Role	Center Viewer Role	MEP Source for Centers Users Role
Center Information				
Locations				
Contacts				
Staff				
Clients				
Projects & Events				
Progress Data				
Strategic Plan				
Operating Plan				
Progress Narrative				
Milestones				
Documents				
Partners				
Affiliates				
Board of Directors				
Cooperative Agreement				
Reports				
Success Stories	 *		 *	 *
State Funding Partner				
Quarterly Reporting Status				
Manage Role Access				
Survey Confirmation				

**Note:**

\* Success Stories may be read from the Success Story link on the Source for Centers home page or from the MEP public site (<http://www.mep.nist.gov>).

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**Procedure**

The following procedure will provide step-by-step instructions for accessing the Center Information Page/Manage Role Access where the Center Director or designate with the Center Reporting Role will assign roles and access levels to center staff members.

Logon to the Source for Centers.

Click on Center Information Pages.

Select your Center from the list.

Once your Center's page is displayed, click on the **Manage Role Access** listed under **Other Links**.

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Figure 2.4-1: Center Information Page, Manage Role Access.

The screenshot shows the website header for the Hollings Manufacturing Extension Partnership, a Source for Centers, with the NIST logo. A navigation menu includes Home, CIP, Communities, Knowledge, Skills, Successes, Conferences, Polls, My Account, and Logout. The main content area is titled "Alabama Technology Network (165) Center Information" and is divided into "General Information" and "Center Management Information".

General Information	
<a href="#">Center Information</a>	<a href="#">Contacts</a>
<a href="#">Locations</a>	<a href="#">Staff</a>

Center Management Information	
<a href="#">Clients</a>	<a href="#">Partners</a>
<a href="#">Projects and Events</a>	<a href="#">Affiliates</a>
<a href="#">Progress Data</a>	<a href="#">Board of Directors</a>
<a href="#">Operating Plan</a>	<a href="#">Reports</a>
<a href="#">Progress Narrative</a>	<a href="#">Success Stories</a>
<a href="#">State Funding Partner</a>	<a href="#">Documents</a>

**Other Links**

<a href="#">Quarterly Reporting Status</a>
<a href="#">Manage Role Access</a>
<a href="#">Survey Confirmation</a>

A red callout box with the text "Click here." points to the "Manage Role Access" link.

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Manage Role Access page will display the current roles assigned to center personnel. Click the **Edit Center Roles** link to assign and/or change access roles and access levels. You will only be able to designate or change the roles for the center staff members who have registered to use the MEP Source for Centers.

Figure 2.4-2: Center Information Page, View Center Roles

**Hollings Manufacturing Extension Partnership**  
Source for Centers

MANUFACTURING EXTENSION PARTNERSHIP | NIST National Institute of Standards and Technology

Home CIP Communities Knowledge Skills Successes Conferences Polls My Account Logout

### Alabama Technology Network (165)

#### View Center Roles

[Edit Center Roles](#)

**Center Roles**

**Management:** Joey Massey, Dana Stone

- Views all information about the center
- Run Reports

**Reporting:**

- Assigns roles for the center
- Run Reports
- Submit all records to meet NIST quarterly reporting requirements
- Verify all records to meet NIST quarterly reporting requirements

Greg Barnett  
Brett Bendall  
Gregg Bennett  
Nancy Boyd  
Paula Byrd  
Kelley Carden  
Jeff Cochran  
Michael Crews  
Hank Czarniecki  
Byron Dunn  
Jennifer East  
Wes Ellis  
Pam Elrod  
Jada Freeman  
Mitch Hamm  
George Hamner  
Gregory Harris  
Brad James  
Sallie King  
Ronny Kisor  
Ashley Ladkey  
Jeff Lankford  
Brandon Lineberry  
Joey Massey  
David Mixson  
Talitha Norris  
Becky Pilkington  
Heather Shar  
Samuel Sims  
Cassandra Spencer  
Ed Steapleton  
Dana Stone  
Center Test  
Robert Tomlinson  
Betty Sue Ussery

**Viewer:** Dana Stone, Center Test

- View restricted documents including Progress Data, Progress Narrative, Partners, Affiliates, Board of Directors, Reporting Status, etc.

**General Information**  
Center Information  
Locations  
Staff  
Contacts

**Center Management Information**  
Clients  
Projects and Events  
Progress Data  
Operating Plan  
Progress Narrative  
Partners  
Affiliates  
Board of Directors  
Reports  
Success Stories  
Documents  
State Funding Partner

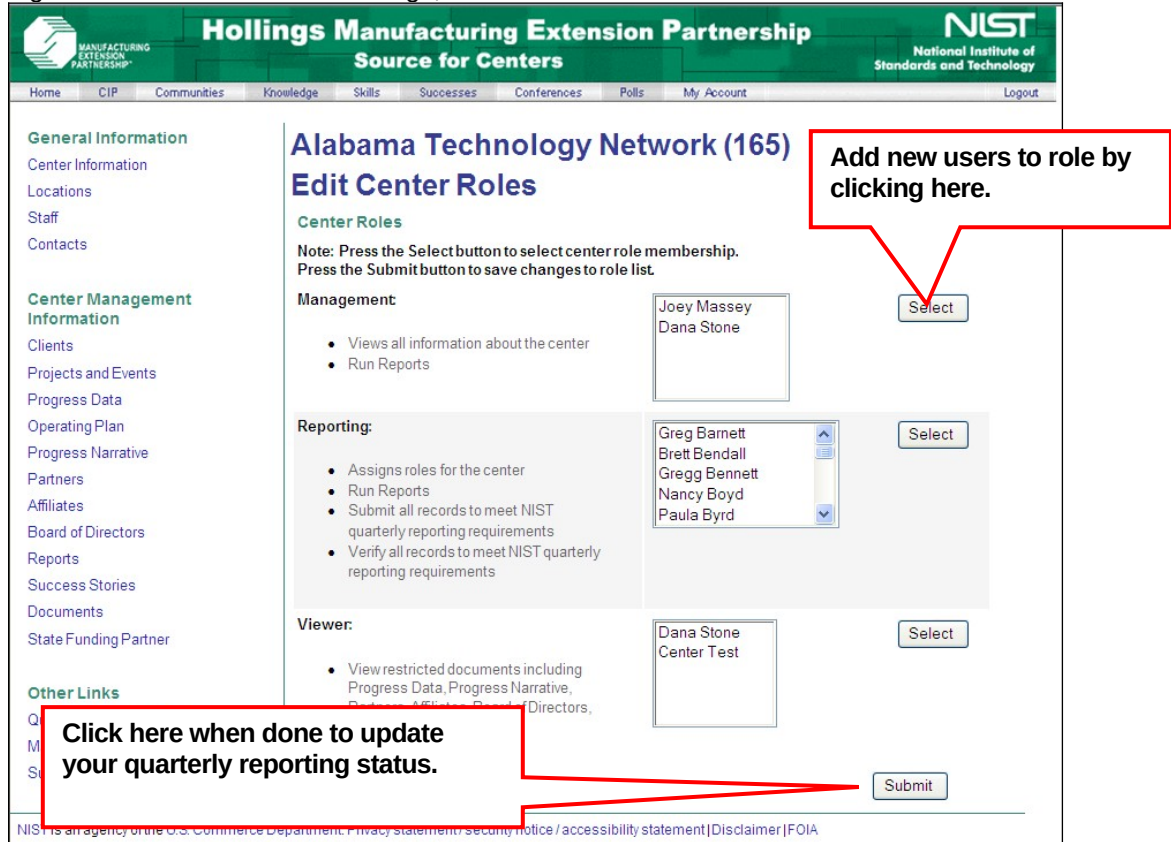
**Other Links**  
Quarterly Reporting Status  
Manage Role Access  
Survey Confirmation

**Click here.**

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8. Manage Role Access page will display the current roles assigned to center personnel. Click the **Edit Center Roles** link to assign and/or change access roles and access levels. You will only be able to designate or change the roles for the center staff members who have registered to use the MEP Source for Centers

Figure 2.4-3: Center Information Page, Edit Center Roles



9. A new screen will appear listing all registered center staff users. Assign center staff to as many Roles as needed by clicking in the checkbox next to the name.
10. Click on the Set Selected Role Members to add the users to the role. See Figure 2.4-4 below for an example.

Figure 2.4-4: Center Role Members Selection

**Manufacturing Extension Partnership**  
**Source For Centers**

Home CIP Modify Account Logout of CIP

**Georgia Manufacturing Extension Partnership (167)**  
**Center Role Members Selection**

Center Role: Management  
 Note: Check/uncheck boxes to select role members.

Select All Unselect All Reset Set Selected Role Members

	CIMS ID	Staff Member
<input checked="" type="checkbox"/>	254	Larry Alford
<input type="checkbox"/>	3266	David Apple
<input type="checkbox"/>	1353	Carol Aton
<input type="checkbox"/>	303	Vernice Bailey
<input type="checkbox"/>	1460	Alan Barfoot
<input type="checkbox"/>	989	Lincoln Bates
<input type="checkbox"/>	3558	Vanessa Bonner
<input type="checkbox"/>	763	Michael Brown
<input type="checkbox"/>	1608	Vicki Bryan
<input type="checkbox"/>	3785	Vivian Chandler
<input type="checkbox"/>	1633	Cheryl Cleveland
<input type="checkbox"/>	1023	Craig Cochran
<input type="checkbox"/>	1473	Sam Darwin
<input type="checkbox"/>	1459	Deann Desai
<input type="checkbox"/>	1888	Danny Duggar
<input type="checkbox"/>	2769	Rick Duke
<input type="checkbox"/>	305	Vivian Edwards
<input type="checkbox"/>	1083	Donna Ennis
<input checked="" type="checkbox"/>	1567	Charles Estes

**Check the box for each user to add to this role.**

**Click here to save your changes.**

11. Click the **Submit** button when done to update your quarterly reporting status. See figure 2.4.3 above for an example.



### 3.0 Quarterly Data Submissions

- **NIST MEP will collect quarterly information and use it to generate standard sets of reports that will be used for center reviews and reporting the program’s performance to Congress. This collection of information also enables NIST MEP to comply with the Government Performance and Results Act mandate that all Federal agencies evaluate their program’s outcomes.**

All quarterly reporting documents will be submitted according to the following schedule:

	Quarter 1	Quarter 2	Quarter 3	Quarter 4
<b>Period:</b>	January 1 – March 31	April 1 – June 30	July 1 – September 30	October 1 – December 31
<b>Deadline:</b>	April 30	July 31	October 31	January 31

Procedures for submitting the reports and descriptions of required fields are given in the following sections. The quarterly data submission sections include a set of key concepts for submitting information to NIST MEP. Key concepts are a set of rules and definitions used throughout the procedures.

### 3.1 Key Concepts

Centers have many different kinds of contact with the manufacturing firms in their regions. Since no two centers within the system are identical or have identical service delivery mechanisms, NIST MEP has created definitions to standardize how centers will report their performance in serving manufacturers. NIST MEP has defined a number of terms used throughout this document. Definitions can be found in Definitions (Section 7.0).

The following information contains the underlying key concepts that center staff members must understand to correctly count and report interactions to NIST MEP.

#### 3.1.1 Substantive Interactions

NIST MEP's primary concern is substantive interactions that result in measurable impact. MEP recognizes the full importance of other interactions or non-substantive interactions that build client relationships and market center services; however, MEP does not collect standardized data regarding these interactions.

The NIST cooperative agreement provides funds for centers to provide services to U.S. based manufacturing establishments. These clients must be submitted to NIST MEP with a valid manufacturing NAICS Code (31-33) or the Research and Development NAICS Code 54171. Centers sometimes undertake activities that involve other support organizations such as other MEP centers, economic development organizations, trade associations, Universities, or state agencies. While such interactions are often valuable and can usually be undertaken in the scope of the NIST cooperative agreement they are not reportable interactions and these other organizations should not be counted or reported as clients. Such organizations are not manufacturers because there are no manufacturing functions on site.

Table 3.1-2: Substantive and Non-Substantive Interactions

Term	Definition	Example(s)
Substantive Interaction	<p>An interaction in which the primary objective of center services is to facilitate measurable changes in a U.S.-based manufacturing establishment's operations, which may affect the establishment's performance. An interaction with a client becomes substantive when discovery stops and service delivery begins.</p> <p>Measurable interactions are reported as:</p> <p>1) Projects -- A set of interactions of the same type and substance undertaken with <b>a single client manufacturing establishment (CME)</b>.</p> <p>2) Events -- A set of interactions undertaken <b>with a group of CMEs that pertain to the same type and substance</b>. Each occurrence counts as one event, regardless of how many CMEs were represent or how many people were present.</p> <p>Note that the Event classification is included as a convenience to centers</p>	<p>Pant Layout Assistance, ISO 9000 Training, and Formal Assessments</p> <p>If a center helps a client reconfigure their assembly line for six hours on each of three successive days, then it is counted as one 18-hour project. The assistance was related to only one project type and one project substance.</p> <p>If 12 people representing 7 CMEs participated in two 1-hour TQM sessions on 2 successive Monday nights, the interaction would be counted as one event with 7 CMEs. (Note: 7 CMEs added to clients served on Progress Data.)</p>

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Term	Definition	Example(s)
	who prefer to group interactions with multiple centers together rather than reporting them separately as projects.	
Non-Substantive Interaction	An interaction or set of interactions in which the primary objective of center services is to build center-client relationships or market center services and which may have no measurable impact.	Matchmaking firms for networks, marketing calls, touring firms to learn best practices, identifying client needs without using a formal assessment tool, defining a project, developing a proposal or project development

**3.1.2 Types of Projects and Events**

There are three types of projects or events that a center can provide to a client. Definitions and examples of each follow.

Table 3.1-2: Types of Projects and Events

Term	Definition	Example(s)
<b>A</b> - Assessment	An interaction or set of interactions in which a structured diagnostic analysis is performed on a CME and feedback is provided to the CME.	Security tool Assessments, QuickView Competitiveness Review, Michigan Performance Benchmarking Service (PBS)
<b>E</b> - Training/Education	An interaction or set of interactions in which a CME learns how to employ general or industry-specific business tools or methods to improve an aspect of its business or to build skills. Training should be classified into appropriate substance codes. Not all training will be classified as Human Resources.	Process improvement breakfast seminar for manufacturing executives that provides specific technical information. This is classified as training/education because it teaches the manufacturing executives how to improve an aspect of their business.
<b>T</b> - Technical Assistance	An interaction or set of related interactions in which technical services and/or information are provided to a CME to help it improve a specific aspect of its business.	The center helps the client identify its need for a CAD/CAM system to improve their production processes. If center services lead to the purchase of a new CAD/CAM system and the center then shows some of the employees how to use this system, this entire set of interactions should be classified as technical assistance. Showing the employees how to use the CAD/CAM system is not considered a separate instance of training/education because it is in direct support of technical assistance.

**3.1.3 Substances of Projects and Events**

Substance refers to one of the broad codes that describe the topic area that is the main target of services. Some projects may cross multiple substance codes. In these cases, centers should choose the substance that best characterizes the nature of the overall engagement. Each of these classifications is defined in the table below.

Table 3.1-3: Project/Event Substance Codes

Code	Title	Definition	Example(s)
11	Business Services	Includes services delivered to business owners, executives and managers in	Executive coaching, transformation planning, enterprise assessment, strategic planning, SWOT

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Code	Title	Definition	Example(s)
		the areas of strategic and long range planning, business development, company financing, market research, industrial marketing, product development, sales planning and sales/distribution management.	analysis, market research, marketing strategies, product distribution and management, customer/market analysis, product costing and profit analysis, sales forecasting and sales, mergers and acquisitions, business financing, strategic partnering, succession planning, business continuity.
12	Quality Systems	Assistance in assuring manufacturers have repeatable, error-free processes. This service area includes the development of management systems, teaching companies how to use statistics to measure variability, and cause and effect thinking.	ISO 9001, ISO 14001, TS 16949, AS 9100, Gauge R & R, Statistical Process Control (SPC), Design of Experiment (DOE), Root Cause Analysis, Quality Function Deployment, Auditing, Continuous Improvement, and Document and Record Control.
13	Manufacturing Systems	Includes services delivered to identify and eliminate waste (non-value-added activities) through continuous improvement by flowing the product and information at the pull of the customer.	Lean assessments, value stream mapping, lean system design, kaizen events, and any services related to 5S, clean manufacturing, cellular/flow, setup reduction, standard work, TPM, pull systems, 3P, poke yoke, waste reduction, material substitution, hazard reduction.
14	Information Technology	Assistance in selection, assessment or implementation of information systems, communications networks, or computer-based technology related to design engineering, or automated manufacturing.	ERP, Accounting, MRP, CAD/CAM and software system selection and implementation, information security assessments, contingency planning, electronic data interchange between remote facilities, suppliers, and customers.
15	Human Resources and Organization Development	Includes work organization, employee involvement and empowerment, compensation and benefits, management methods, and organizational culture	Job Analysis and Human Resource Planning, Recruitment, Staffing, Appraising Employee Performance, Supervisory and Leadership Development, Pay Systems, Indirect Compensation, Motivation Strategies for Performance Improvement, Labor Relations, Safety and Health Programs, Change Management, Team Development, Cultural Assessment, Values Clarification and Alignment and Succession Planning.
16	Engineering/ Technical Services	Includes technical services delivered to solve specific manufacturing process or R&D challenges	New product R & D, Engineering services, equipment design, tooling.

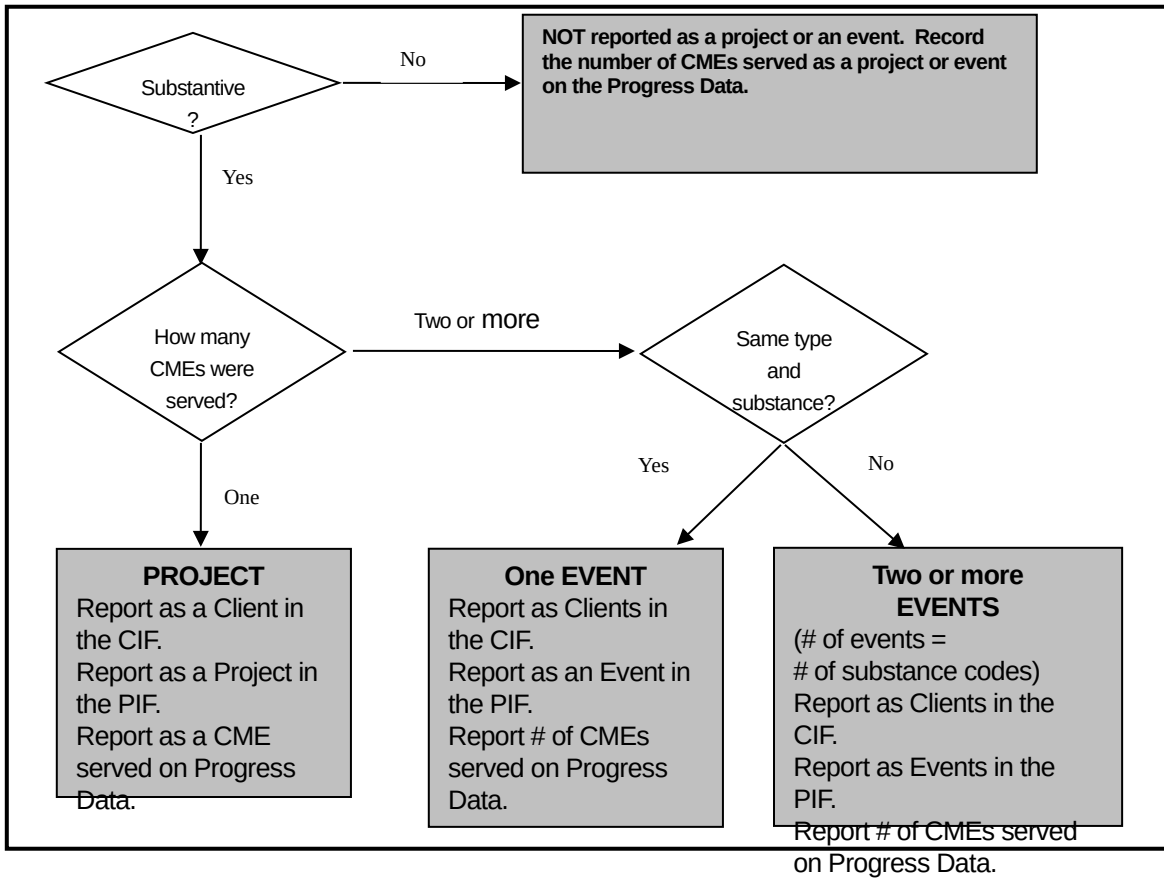
**3.1.4 Procedures to Determine the Classification of Interactions**

Substantive interactions are reported to NIST MEP in the Client Information File (CIF, see section 3.3), Project Information File (PIF, see section 3.4), and the Progress Data (see section 3.5). Non-substantive interactions are reported ONLY on the Progress Data.

To classify the interaction, answer the following questions about each specific set of interactions. An overview of the process is shown in Figure 3.1-1 and the specific steps for classifying the interactions follow.

Note that the Event classification is included as a convenience to centers that prefer to group interactions with multiple clients together rather than reporting them separately as projects.

Figure 3.1-1: Overview of the Steps to Classify an Interaction

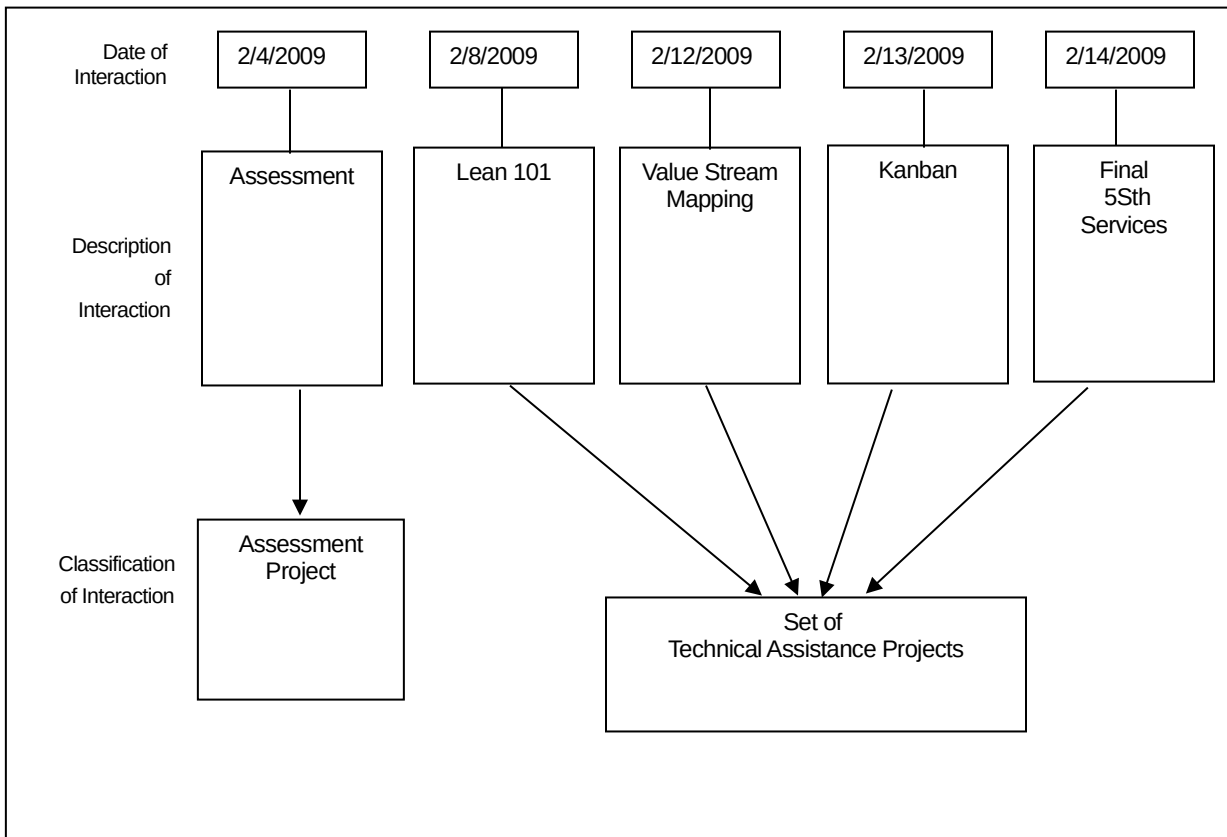


**Five Key Points Regarding Project and Event Classification**

The following situations demonstrate five key points about classifying interactions.

Assessments that lead to technical assistance (with the same substance code). Often a center will conduct an assessment for a client and then conduct one or more assistance projects based on that assessment's findings. An assessment and technical assistance project are two different projects and types of projects. The result is two separate projects, one assessment project and one or more technical assistance projects.

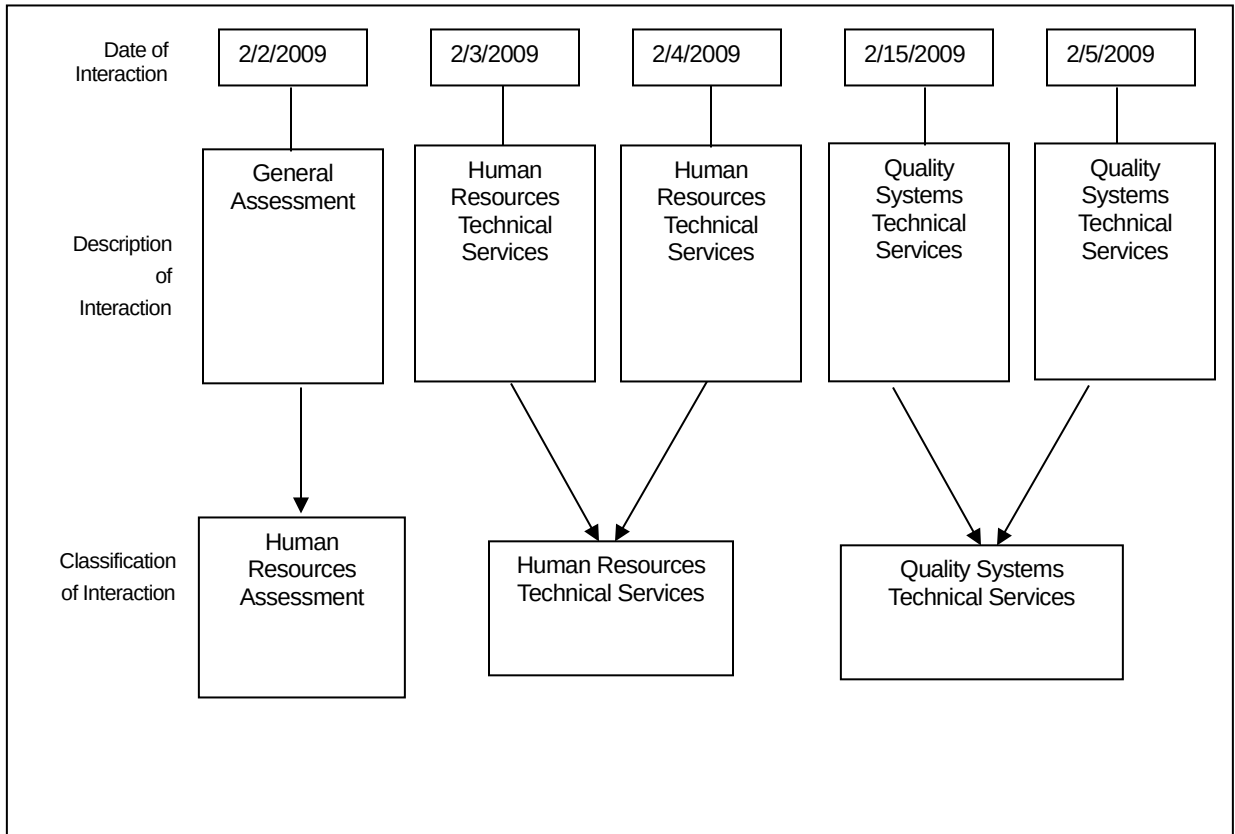
Figure 3.1-2: Assessments that Lead to Technical Assistance (with the Same Substance Code)



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- 12. Assessments that lead to technical assistance (with two or more different substance codes). There are cases in which a center may conduct a formal assessment that leads to the provision of technical assistance services of two different substance codes. The result is a separate project for each substance code.

Figure 3.1-3: Assessments that Lead to Technical Assistance (with Two Different Substance Codes)

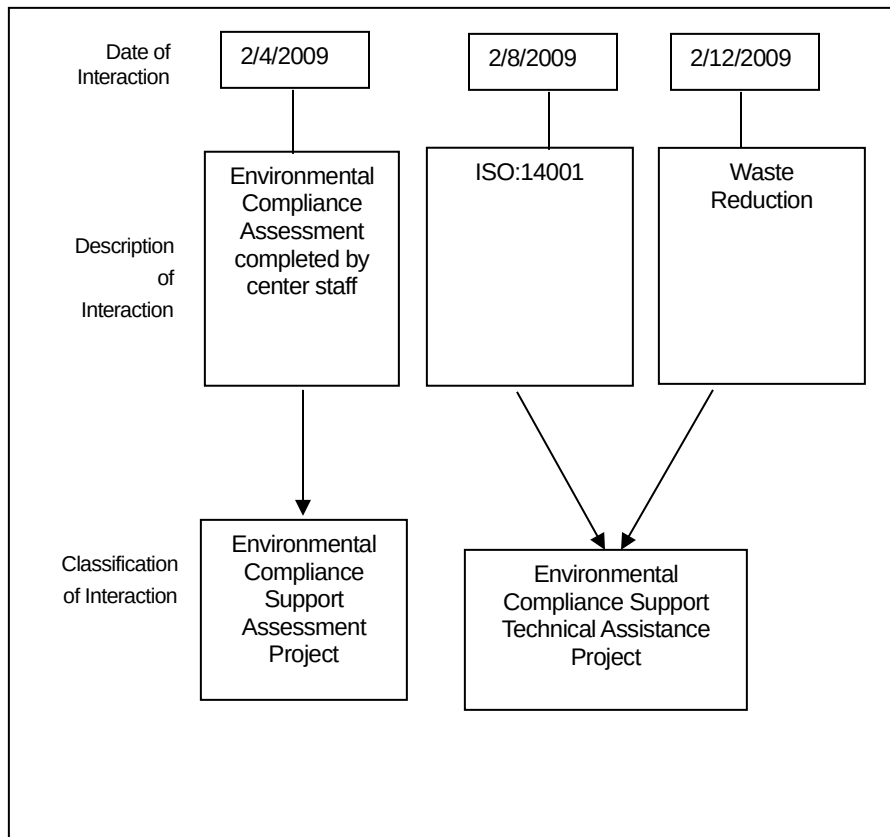


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13. Contracted or brokered services - Some centers broker the services of consultants or other assistance organizations. In the case of brokered services, center staff will assess client needs and then help the client find an affiliate service provider who can meet those needs and arrange for services to be provided to the client. Centers can report and claim credit for services they have brokered if and only if center staff provides project management and oversight of that assistance.

**Note: Centers must track or otherwise approximate the hours the affiliate provider spends with the client and classify the interactions just as if the center were providing the services themselves.**

Figure 3.1-4: Contracted or Brokered Services



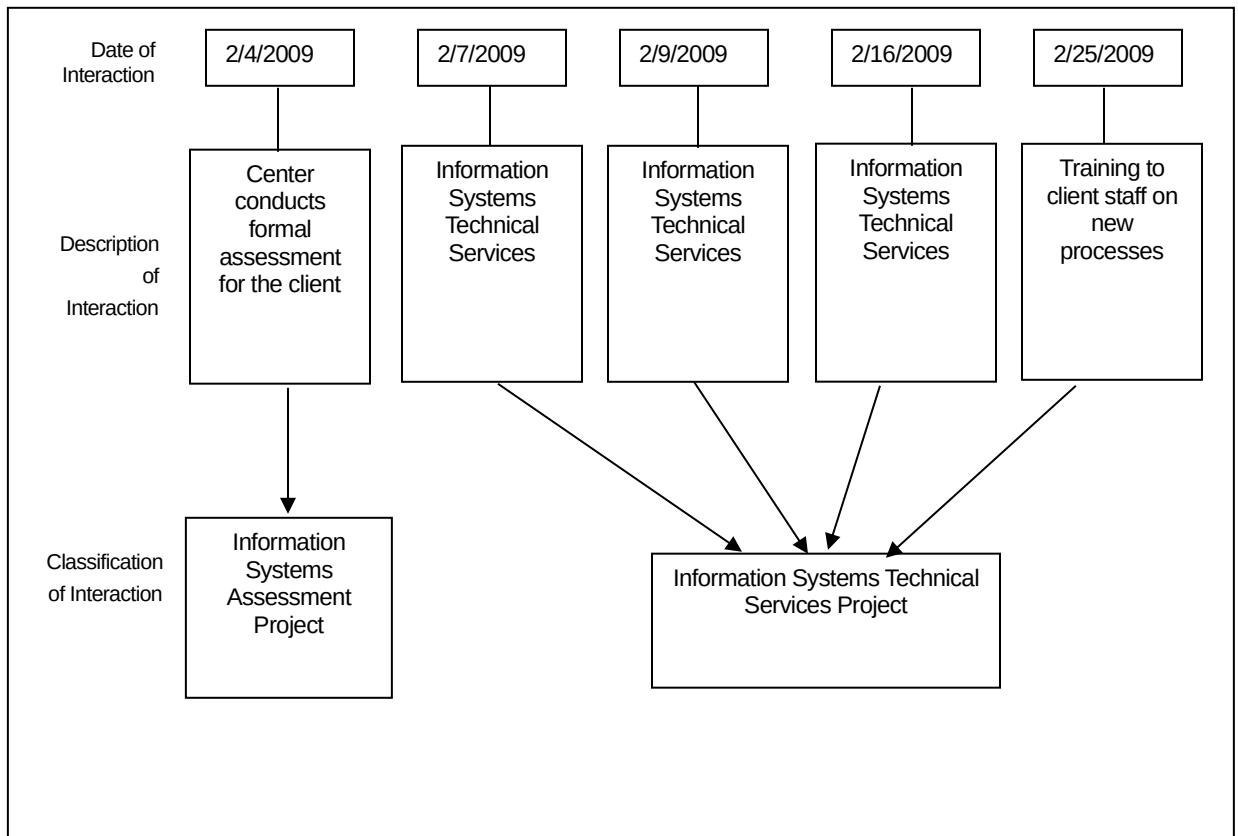


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14. Technical assistance leads to training. Sometimes, to fully implement a technical assistance project, a center may need to provide employees some specialized training in order to guarantee the success of the technical assistance. Such interactions, which are directly in support of a technical assistance project, are not considered a separate project. Instead, they are considered part of the technical assistance project. The center should classify interactions that directly support a technical assistance project as a part of the technical assistance project.

**Note: The way in which interactions are classified for NIST reporting purposes is in no way related to the type or number of contracts between the center and the client. In some cases one contract might cover more than one project. In other cases one project might continue in phases across several contracts.**

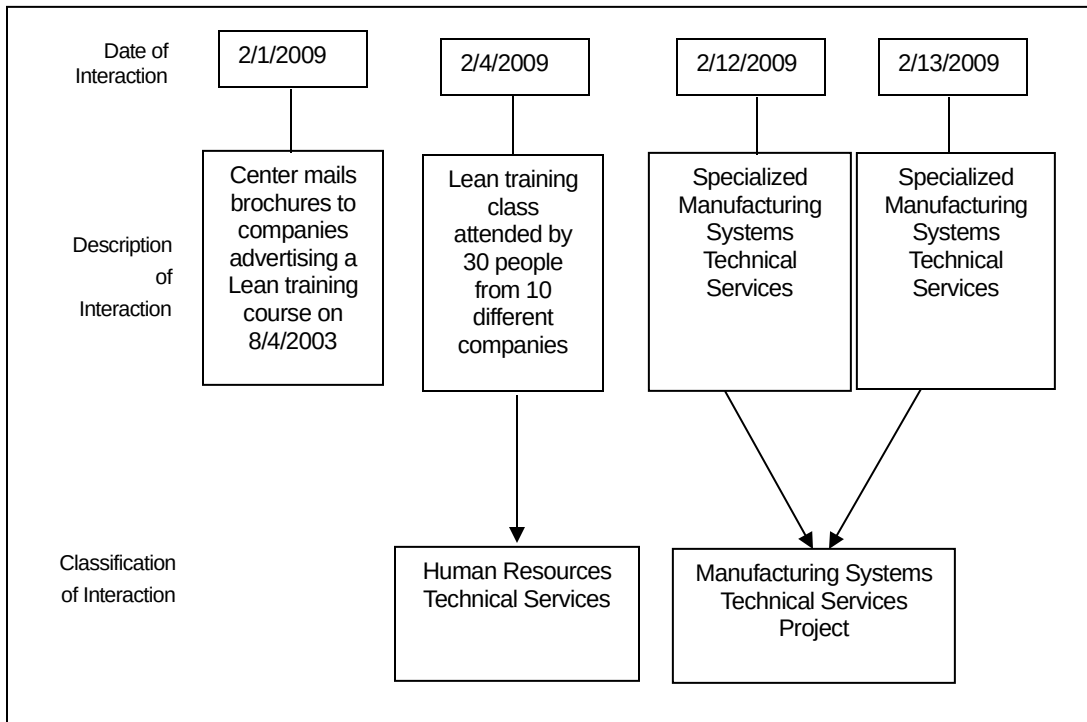
Figure 3.1-5: Technical Assistance Leads to Training



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15. Training leads to technical assistance. Sometimes after a training/education event, a client will request that the center provide them with technical assistance. In this case, where a training/education event leads to technical assistance, the two interactions (or set of interactions) are considered to be one project and one event if the training was performed in a group setting. Centers will classify training that leads to technical assistance as separate projects/events, one for each substance code.

Figure 3.1-6: Training Leads to Technical Assistance



## Board of Directors

---

Information contained in the Board of Directors section is intended to provide the NIST MEP Federal Program Officer (FPO) with general information about the Board and Board members. The FPO will use this information in their day-to-day role as a consultant to the center.

A center may have two types of Boards – a fiduciary board and/or an advisory board. A fiduciary board exists for all freestanding non-profit organizations. A fiduciary board will have a charter document and/or bylaws describing the duties and terms of the board members.

Characteristics of a fiduciary board typically include:

- **Involvement in making policy decisions related to the center;**
- **Responsibility for hiring and firing the Director/President/CEO;**
- **Involvement in the center’s planning and operations; and**
- **Some level of legal liability for all aspects of center performance.**

In contrast, an advisory board is usually a less formal body, and can be affiliated with any type of organization. The roles and responsibilities of advisory boards may be similar to fiduciary boards, or they may be more focused on areas such as client needs.

### *Requirements for Board of Directors*

The Board of Directors information is required by the terms and conditions of the Center’s Cooperative Agreement. Center personnel will review and update their Board of Directors at least once per quarter.

### *Procedures*

The following procedure will provide step-by-step instructions for centers to add new Board of Directors information, adding new Board of Directors Members, review the list of Boards, and delete Board of Directors information each quarter.

#### *Procedure for Submitting, Reviewing, and Editing Board of Directors Information*

The center staff member submitting New Board of Directors information must be assigned the Center Reporting Role in order to enter the information. See section 2.4 of this document for more information on assigning roles.

The following procedures will guide center staff members through the process of submitting information about their new Board of Directors.

Centers will enter information about their Board of Directors into predefined text fields by doing the following:

- 1) Center personnel (assigned the Center Reporting role) will log into the MEP Source for Centers site and navigate to the Center Information Page.
- 2) From the Center Information Page select the **Board of Directors** link as shown in Figure 3.10-1.

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Figure 3.10-7: Center Information Page, Board of Directors Link

The screenshot shows the website header for the Hollings Manufacturing Extension Partnership, a source for centers, affiliated with NIST (National Institute of Standards and Technology). The navigation menu includes Home, CIP, Communities, Knowledge, Skills, Successes, Conferences, Polls, My Account, and Logout. The main content area is titled 'Alabama Technology Network (165) Center Information'. Under 'General Information', there are links for Center Information, Locations, Contacts, and Staff. Under 'Center Management Information', there are links for Clients, Partners, Projects and Events, Affiliates, Progress Data, Board of Directors, Operating Plan, Reports, Progress Narrative, Success Stories, State Funding Partner, and Documents. Under 'Other Links', there are links for Quarterly Reporting Status, Manage Role Access, and Survey Confirmation. A red box highlights the 'Board of Directors' link, with a red callout box containing the text 'Click here.' pointing to it.

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- 3) A page listing all Boards for the center will be displayed. Click on Compose New Board of Directors to create a new Board record, see figure 3.10-2.

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Figure 3.10-2: Board of Directors Members

The screenshot shows the website interface for the Alabama Technology Network (165) Board of Directors Members. The header includes the logo and navigation menu. A red callout box highlights the 'Compose New Board of Directors' link. The main content area features a table with one row of board member information and a 'Submit for Reporting for 2008 Q4' button.

CIMS ID	Board Name	Type	Chairperson	Remove
1	Alabama Technology Network Board of Directors	Advisory	Keith Wilson	<input type="checkbox"/>

[Compose New Board of Directors](#)

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- 16. **4)** Enter the Board Name and Type.
- 5)** Next click the **Submit** button to save the Board of Directors information. See figure 3.10-3.

Figure 3.10-3: Compose New Board of Directors

The screenshot shows the website header for the Hollings Manufacturing Extension Partnership, a source for centers, with the NIST logo. The main content area is titled 'Alabama Technology Network (165) Compose New Board of Directors'. It features a 'Board of Directors' section with a note that a red asterisk denotes a required field. The 'Board Name' field is empty and marked as required. The 'Type' field has two radio button options: 'Advisory' and 'Fiduciary'. Below these are 'Submit' and 'Reset' buttons. A red callout box with a pointer to the 'Submit' button contains the text: 'Enter the Board name and type. Click here to save the board.'

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6) Once a New Board of Directors has been created, you must enter the Board Members' information. The designated center staff member will follow these instructions to add members to the Board of Directors. Next, the Board of Directors Edit screen will open. Click on the link Add Board of Directors Member to add the board members. See figure 3.10-5 below for an example. The center staff member Adding New Board Members information must be assigned the Center Reporting Role in order to enter the information. See section 2.4 of this document for more information on assigning roles.

7) When done, click the Submit button to close this window and return to the Board of Directors listing. See figure 3.10-4. Some changes can only be made by NIST/MEP. For instance, changing contact information if a user account exists for the board member and adding Bylaws. Email all user account changes and Bylaws to [webmaster@mep.nist.gov](mailto:webmaster@mep.nist.gov).

Figure 3.10-4: Edit Board of Directors

**Hollings Manufacturing Extension Partnership**  
 Source for Centers

**NIST**  
 National Institute of Standards and Technology

Home CIP Communities Knowledge Skills Successes Conferences Polls My Account Logout

**Alabama Technology Network (165)**  
**Edit Board of Directors**

Board of Directors

Note: \* denotes that the field is required.

CIMS ID: 142

Board Name \*: A Center Board

Type \*:  Advisory  Fiduciary

Note: Some changes to the Board of Directors must be made by NIST MEP. Please elaborate on any changes to be made and NIST MEP will be notified to make the changes.

Changes Needed:

[Add Board of Directors Member](#)

Submit Reset

**Record History**

Created On/By:	03/21/2008 by Deirdre McMahon
Updated On/By:	03/21/2008 by Deirdre McMahon

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**Click here to add board members.**

**Click here to save your changes.**

8) Enter the board member's information. You may choose to create a user account for board members to view information about your center. User account choices are "Do not

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use”, “Use existing”, and “Create a new”. See Figure 3.10-5 below for more information on adding board members.

**Figure 3.10-5: Compose New Board of Directors Member**

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 Source for Centers

MANUFACTURING EXTENSION PARTNERSHIP

NIST  
 National Institute of Standards and Technology

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**Alabama Technology Network (165)**  
**Compose New Board of Directors Member**

**Board Member Information**  
 Note: \* denotes that the field is required.

User Account:  Do not use  
 Use existing  
 Create new

Salutation:

First Name:

Last Name:

Title:

Small Manufacturer:

Chairperson:

Tenure on Board Since:

**Contact Information**

Organization Name:

Address 1:

Address 2:

City:

State:

ZIP:

Phone:

Fax:

Email:

**Record History**

Created On/By:

Updated On/By:

General Information  
 Center Information  
 Locations  
 Staff  
 Contacts

Center Management Information  
 Clients  
 Projects and Events  
 Progress Data  
 Operating Plan  
 Progress Narrative  
 Partners  
 Affiliates  
 Board of Directors  
 Reports  
 Success Stories  
 Documents  
 State Funding Partner

Other Links  
 Quarterly Reporting Status  
 Manage Role Access  
 Survey Confirmation

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9 After entering board member, you will be returned to the Edit Board of Directors screen where you can add more board members, or remove board members. See Figure 3-10.6 below.

Figure 3.10.6: Edit Board of Directors



**Hollings Manufacturing Extension Partnership**  
 Source for Centers

**NIST**  
 National Institute of Standards and Technology

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- Board of Directors Member has been successfully saved.

**Alabama Technology Network (165)**  
**Edit Board of Directors**

**Board of Directors**

Note: \* denotes that the field is required.

CIMS ID: 142

Board Name:

Type:  Advisory  Fiduciary

Note: Some changes to the Board of Directors must be made by NIST MEP. Please elaborate on any changes to be made and NIST MEP will be notified to make the changes.

Changes Needed:

[Add Board of Directors Member](#)

**Board Member Information**

Member information can be edited by the center by clicking on the member link below.

Member Name	Small Manufacturer	Chairperson	Tenure	Deactivate
<a href="#">Joe Smith</a>	Yes	Yes	2008	<input type="checkbox"/>

**Record History**

Created On/By:	03/21/2008 by Deirdre McMahon
Updated On/By:	03/21/2008 by Deirdre McMahon

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**Click on the board member to review/edit.**

**Click here to save changes.**

**Click here to reset the form and remove changes.**

**Click here to add more board members.**

**Click the check box to archive the board member.**

10) After saving your changes you will be returned to the Board of Directors Members page where all boards will be listed. You may edit other boards or remove boards. See figure 3.10.7 below.

11) When done, click on the Submit for Reporting button to finalize your submission and update your quarterly reporting status. See Figure 3.10.7 below.

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Figure 3.10.7: Board of Directors Members

MANUFACTURING EXTENSION PARTNERSHIP

# Hollings Manufacturing Extension Partnership

Source for Centers

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• Board of Directors has been successfully saved.

## Alabama Technology Network ( )

### Board of Directors Members

[Compose New Board of Directors](#)

CIMS ID	Board Name	Type	Chairperson	Remove
142	A Center Board	Advisory	Joe Smith	<input type="checkbox"/>
143	Center Board 2	Fiduciary	<chairperson not found>	<input type="checkbox"/>

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**Click here to add another board.**

**Click on the board name to edit it.**

**Click here to update your quarterly submission status.**

**Click the checkbox to remove a board.**

**General Information**  
Center Information  
Locations  
Staff  
Contacts

**Center Management Information**  
Clients  
Projects and Events  
Progress Data  
Operating Plan  
Progress Narrative  
Partners  
Affiliates  
Board of Directors  
Reports  
Success Stories  
Documents  
State Funding Partner

**Other Links**  
Quarterly Reporting Status  
Manage Role Access  
Survey Confirmation

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*Field Descriptions for Board of Directors*

Table 3.10-3: Field Descriptions for Board of Directors Information

<b>Instructions</b>	<b>Field Name</b>	<b>Example</b>
Board Name (Required)	Enter name of board.	Alabama Technology Network Advisory Board
Type  ■ <b>(Required)</b>	  ■ <b>Choose type of board</b> <b>Advisory/Fiduciary</b>  .	Advisory
User Account (Required)	Choices relate to SFC ID and information. Choices are: Do not use SFC, Have existing SFC, or Create a new SFC account.	Use existing
Salutation	Enter board member's salutation.	Mr.
Last Name (Required)	Enter board member's first and last name.	John Doe
First Name (Required)	Enter board member's organization name.	Department of Commerce
Position (Required)	Enter board member's position in organization.	President
Small Manufacturer (Required)	Enter if the board member represents a SME?	Checkbox Yes
Chairman	Check if member is chairman of the board.	Checkbox YES
Tenure on Board (Required)	Enter year member become tenure on board. Choose from pick list.	2001
Address 1 (Required)	Enter address of board member's organization.	100 Bureau Drive
Address 2	Enter address of board member's organization.	Suite C100
City (Required)	Enter name of city where board member's organization is located.	Gaithersburg
State (Required)	Choose name of state where board member's organization is located (from drop-down-menu).	Maryland (MD)
Zip Code (Required)	Enter zip code where board member's organization is located.	20899-4800
Phone number (Required)	Enter main telephone number for board member.	907-258-4250
Fax number	Enter main fax number for board member.	907-258-4255
E-mail Address (Required)	Enter e-mail address for each board member.	boardmember@organization.com

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## Locations

---

Locations are physical addresses where center staff or partner staff are based or deliver service. The Locations are intended to provide NIST MEP with general information such as address information of the center's locations. Some locations can be partner's service delivery locations. MEP will use this information to communicate our national coverage area with our various stakeholders. It is the center's responsibility to ensure all of its locations are included in the locations listing.

### *Requirements for Locations*

The locations information is required by the terms and conditions of the center's cooperative agreement. Center personnel will review and update their center locations information at least once per quarter.

### *Procedures*

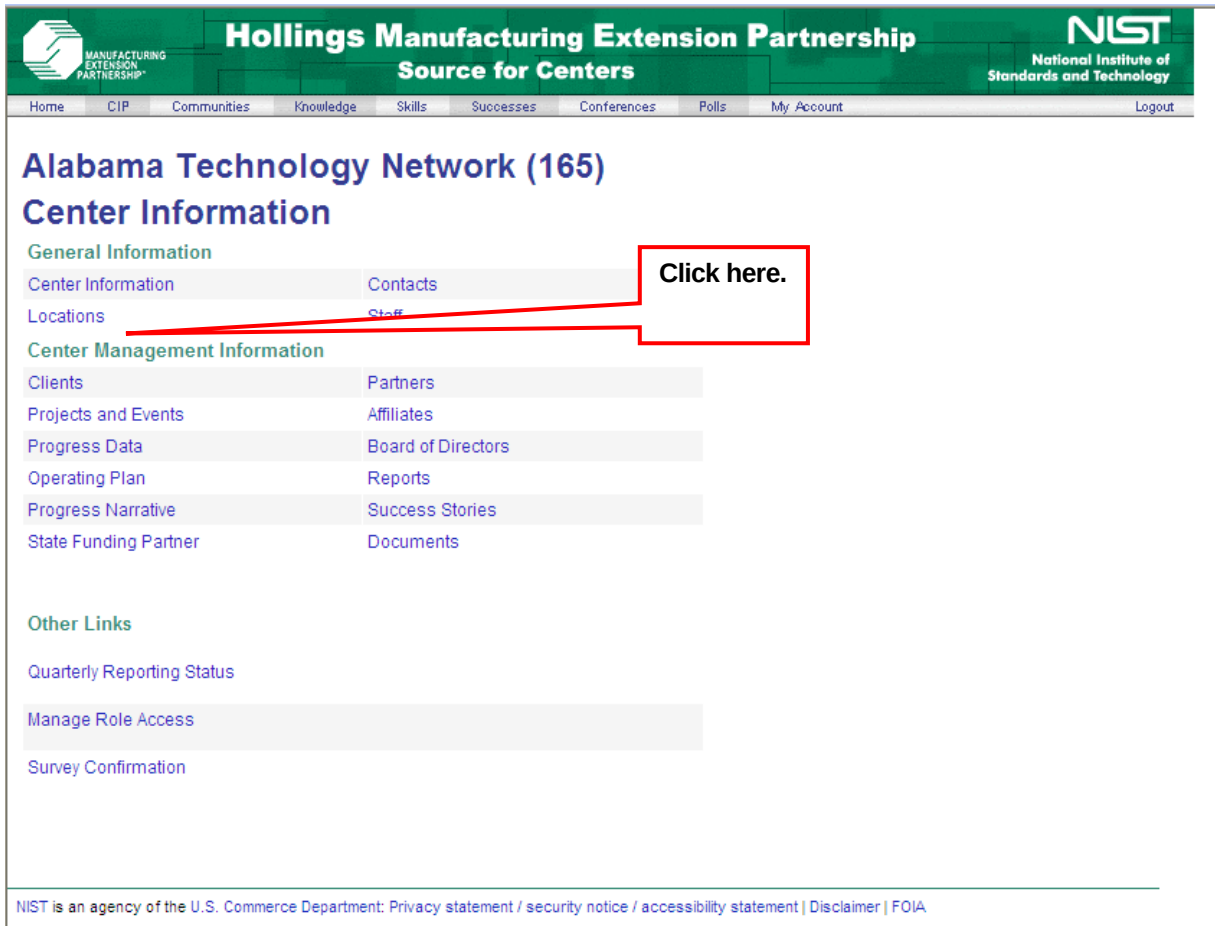
The following procedures will provide step-by-step instructions for the designated center personnel to review, update, delete and add Location information (**centers and regional offices cannot be deleted.**)

#### *Procedure for Reviewing Locations*

NIST MEP requires that the location listing is updated quarterly. The personnel assigned the **Center Reporting Role** checks that locations are still partnered with the center. The steps to review locations are below. See section 2 of this document for more information on the reporting role.

- 1) Center personnel (assigned the Center Reporting role) will log into the MEP Source for Centers site and navigate to the Center Information Page.
- 2) From the Center Information Page select the Locations link as shown in Figure 3.11-1.

Figure 3.11-8: Center Information Page, Locations link



- 3) Click on each Location listed to review the Location information.
- 4) The locations screen will appear. You may edit, review, or delete a location from this screen. Remember to click on the **“Submit For Reporting”** button. This saves the information and updates the quarterly reporting status to indicate quarterly reporting guidelines for Locations have been met. See Figure 3.11-2 below for more information.

Figure 3.11-2: Locations

**Hollings Manufacturing Extension Partnership**  
Source for Centers

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**Alabama Technology Network (165)**  
Locations

Compose New Location

CIMS ID	Name	City	State	Remove
<b>Center</b>				
165	Alabama Technology Network	Birmingham	AL	<input type="checkbox"/>
<b>Field Offices</b>				
267	Mobile ATN Center	Mobile	AL	<input type="checkbox"/>
<b>Partners</b>				
350	Alabama Southern Community College	Thomasville	AL	<input type="checkbox"/>
355	Auburn University	Auburn	AL	<input type="checkbox"/>
1611	Bevill State Community College	Sumiton	AL	<input type="checkbox"/>
343	Central Alabama Community College	Alexander City	AL	<input type="checkbox"/>
348	Gadsden State Community College	Gadsden	AL	<input type="checkbox"/>
351	Jefferson Davis Community College	Brewton	AL	<input type="checkbox"/>
353	Jefferson State Community College	Birmingham	AL	<input type="checkbox"/>
1671	Lawson State Community College	Birmingham	AL	<input type="checkbox"/>
1610	Northeast Alabama Community College	Rainsville	AL	<input type="checkbox"/>
346	Northwest-Shoals Community College	Muscle Shoals	AL	<input type="checkbox"/>
340	The University of Alabama	Tuscaloosa	AL	<input type="checkbox"/>
339	The University of Alabama in Huntsville	Huntsville	AL	<input type="checkbox"/>
344	Wallace Community College - Dothan	Dothan	AL	<input type="checkbox"/>
1612	Wallace Community College - Hanceville	Hanceville	AL	<input type="checkbox"/>
1613	Wallace Community College - Selma	Selma	AL	<input type="checkbox"/>
341	Wallace Community College-Sparks Campus	Eufaula	AL	<input type="checkbox"/>

Submit for Reporting for 2008 Q4

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**Click here to review or edit this location.**

**Click here to compose a new location.**

**Click here to remove this location.**

- 5) If you click on the Compose New Location link see Figure 3.11-3 below for more information.

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Figure 3.11-3: Compose New Location

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Source for Centers

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**General Information**  
Center Information  
Locations  
Staff  
Contacts

**Center Management Information**  
Clients  
Projects and Events  
Progress Data  
Operating Plan  
Progress Narrative  
Partners  
Affiliates  
Board of Directors  
Reports  
Success Stories  
Documents  
State Funding Partner

**Other Links**  
Quarterly Reporting Status  
Manage Role Access  
Survey Confirmation

## Alabama Technology Network (165)

### Compose New Location

**Location**

Note: \* denotes that the field is required.

Name: \*

Address 1: \*

Address 2:

City: \*

State: \*

ZIP: \*

**Record History**

Created On/By:	
Updated On/By:	

**Enter the required information and click here to save the record.**

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Figure 3.11-3: Compose New Location

- 6) If you clicked on an existing location to review or edit it see Figure 3-11.4 below for more information.
- 7) If you want to edit this location click on the Edit Center Information link as show in Figure 3-11.4 below.

Figure 3-11.4: View Location

The screenshot shows the website interface for the Hollings Manufacturing Extension Partnership. The header includes the logo and name of the partnership, along with the NIST logo. A navigation menu is located below the header. The main content area is titled 'Alabama Technology Network (165) View Location'. On the left, there is a sidebar menu with categories like 'General Information', 'Center Management Information', and 'Other Links'. The main content area displays details for a specific location, including fields for CIMS ID, Name, Address 1, Address 2, City, State, and ZIP. An 'Edit Location' link is visible in the top right of the location details section. A red box with a pointer highlights this link, and a text box next to it says 'Click here to edit this location.' Below the location details is a 'Record History' section showing creation and update dates and users.

Location	
CIMS ID:	523
Name:	Horseville
Address 1:	100 Bureau Drive
Address 2:	
City:	Birmingham
State:	AL
ZIP:	32169

Record History	
Created On/By:	03/21/2008 by Deirdre McMahon
Updated On/By:	03/21/2008 by Deirdre McMahon

- 8) If you clicked on the link to edit center information see Figure 3-11.5 below. Remember to click on the Submit for Reporting button to finalize the submission and update your quarterly reporting status.



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Figure 3-11.5: Edit Location

**Hollings Manufacturing Extension Partnership**  
Source for Centers

**NIST**  
National Institute of Standards and Technology

Home CIP Communities Knowledge Skills Suooesses Conferences Polls My Account Logout

**General Information**  
Center Information  
Locations  
Staff  
Contacts

**Center Management Information**  
Clients  
Projects and Events  
Progress Data  
Operating Plan  
Progress Narrative  
Partners  
Affiliates  
Board of Directors  
Reports  
Success Stories  
Documents  
State Funding Partner

**Other Links**  
Quarterly Reporting Status  
Manage Role Access  
Survey Confirmation

### Alabama Technology Network (165)

## Edit Location

**Location**

Note: \* denotes that the field is required.

CIMS ID: 523

Name: \* Horseville

Address 1: \* 100 Bureau Drive

Address 2:

City: \* Birmingham

State: \* Alabama

ZIP: \* 32169

Submit

**Record History**

Created On/By: 03/21/2008 by Deirdre McMahon

Updated On/By: 03/21/2008 by Deirdre McMahon

**Edit the record as necessary. Click here to save your changes.**

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**Field Descriptions**

Table 3.11-1: Field Descriptions for Locations Record

Field Name	Instructions	Example
<b>Locations Information</b>		
Name (Required)	Enter location's organization's name	Huntsville Community College
Address 1 (Required)	Enter street address of center or center location.	430 W. 7th Ave.
Address 2 (Required)	Enter room or suite where center's office is located.	Suite 30 (Room, Suite, Bldg, other)
City (Required)	Enter city in which Center Location is located.	Huntsville
State (Required)	Choose state in which Center Location is located (from drop-down-menu).	AL
Zip (Required)	Enter five-digit zip code of Center Location.	99501



## Staff

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The Staff submission is intended to provide the center a mechanism for reporting on its active workforce. Anyone devoted to the center, either as an employee or part of a partner’s cash or in-kind contributions, as delineated in the center’s current operating plan, is considered part of the center’s staff and should be reported. Workers indirectly paid through a subcontract to work for the center for a set amount of time per year or for a set amount of money per year, should be included as well. Center Staff members are automatically included in the staff listing when they register for access to the MEP Source for Centers. It is the center’s responsibility to ensure all of its members are included in the staff listing. Please encourage staff members to register.

### 3.12.1 Requirements for Staff

The staff information is required by the terms and conditions of the center’s cooperative agreement. Center personnel will review and update their staff information at least once per quarter.

### 3.12.2 Procedures

The following procedures will provide step-by-step instructions for each staff member to make changes to their own staff record and for center personnel to review the list of registered staff members.

#### *Procedure for Modifying Staff Records*

The staff listing is a compilation of registered center staff users. NIST MEP requires that the staff listing is updated quarterly. Each center staff member is responsible for maintaining his or her own record. The personnel assigned the **Center Reporting Role** checks that they are still employed or affiliated with the center. The steps to modify staff records are below.

- 9) Center personnel will log onto the Center Information Pages (<https://cip.nist.gov/cims2-web/>) with their username and password and select **Modify Account** from the main menu as shown below in Figure 3.12-1. This option is also available from top navigation bar on all pages except for the Home Page.

Figure 3.12-9: Center Information Pages, Modify Account Link



- 10) Your user record is presented with three options: 1) Edit User Information (see figure 3.12-3); 2) Edit Login Information (see figure 3.12-4); and 3) Edit Skills Information (see figure 3.12-5) .

Figure 3.12-10: View User Information

**View User Information**

[Edit Account Information](#) ■ [Edit Login Information](#) ■ [Edit Skills Information](#)

**Deirdre McMahon**

Salutation: Ms.  
First Name: Deirdre  
Last Name: McMahon  
Company: NIST  
Address 1: 100 Bureau Drive  
Address 2: Stop 4800  
City: Gaithersburg  
State: Maryland  
ZIP: 20899-4800  
Phone: 301-975-8328 Ext.:  
Fax:  
Email: deirdre.mcmahon@nist.gov

**Account Information**

Type: MEP  
Affiliation: MEP

**Skills Information**

Expertise: Discipline - Innovation; Discipline - Process Development; Industry - Agriculture  
Experience: fgdf ddfg

**MEPU Class Completions**

LE101, LE 101 - Principles of Lean Manufacturing with Live Simulation, 01/01/2004 (TBD)  
TM302, TM 302 - Change Management, 07/31/2003 (TBD)  
LE 202, LE 402 - Value Stream Mapping Train the Trainer, 01/01/2000 (TBD)

**Resume**

**Click here to modify name, address, telephone number, and email address.**

**Click here to change your login name and/or password.**

**Click here to edit your skills information**

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- 11) After clicking on the Edit Account Information link, your user record will open in edit mode. After making your updates, click the submit button to submit your changes to NIST/MEP. See figure 3.12-3.

Figure 3.12-3: Modify User Information

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## Edit User Information

### Deirdre McMahon

Note: \* denotes that the field is required.

Salutation: *	<input type="text" value="Ms."/>
First Name: *	<input type="text" value="Deirdre"/>
Last Name: *	<input type="text" value="McMahon"/>
Title: *	<input type="text" value="Reporting and Evaluation Administrator"/>

#### Contact Information

Address 1: *	<input type="text" value="100 Bureau Drive"/>	
Address 2:	<input type="text" value="Stop 4800"/>	
City: *	<input type="text" value="Gaithersburg"/>	
State: *	<input type="text" value="Maryland"/>	
ZIP: *	<input type="text" value="20899-4800"/>	
Phone: *	<input type="text" value="301-975-8328"/>	Ext.: <input type="text"/>
Fax:	<input type="text"/>	
Email: *	<input type="text" value="deirdre.mcmahon@nist.gov"/>	

#### Account Information

Type:	MEP
Affiliation:	MEP

**Edit the information as necessary, and click here to save your changes.**

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- 12) After clicking on the Edit Login Information link, the user credentials information screen will open in a new window in edit mode. From here you can edit you existing username and password. See figure 3.12-4.
- 13) Click on the Password Help link for more information on the password requirements. See Figure 3.12-5 below.

Figure 3.12-4: Modify Login Information

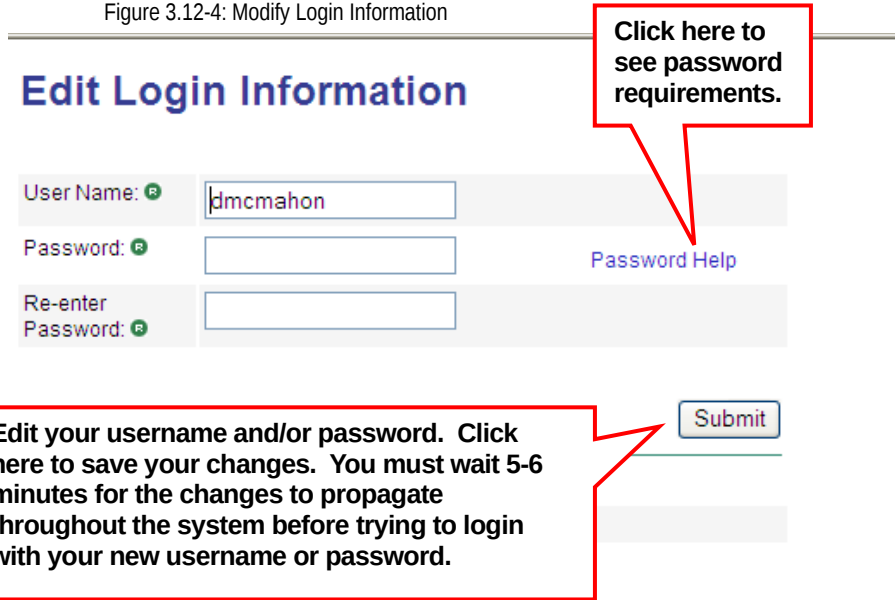


Figure 3.12-5: Password Help

**Password Help**

- Passwords must be at least 8 characters in length
- At least 1 character must be alphabetic
- At least 1 character must be numeric or a special character (~, !, \$, %, ^, and \*)
- At least 6 of the characters should only occur once
- Password Examples
  - Valid (169OakRoad, LIV2BNOC, FlyFi\$hing)
  - Invalid (aabbcc\$\$, ba\$ebal!, abracadabra2, bigredcat, 1234\$!~^)

**Note:** The Department of Commerce Password Policy requires all Source for Centers users to change their password every 90 days.

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- 14) After clicking on the Edit Skills Information link, the skills information screen will open in a new window in edit mode. From here you can edit you existing skills information. See figure 3.12-4.

Figure 3.12.5

## Edit Skills Information

**Deirdre McMahon**

Note: ● denotes that the field is required.

Experience: ●

fgdf ddfg

- Expertise:
- Discipline - Department of Defense
  - Discipline - Economic Development Administration
  - Discipline - Environmental Regulation
  - Discipline - Finance
  - Discipline - Information Technology
  - Discipline - Innovation
  - Discipline - Lean
  - Discipline - Marketing
  - Discipline - Partnerships
  - Discipline - Process Development
  - Discipline - Product Development
  - Discipline - Project Management
  - Discipline - Quality
  - Discipline - Research
  - Discipline - Sales
  - Discipline - Strategy
  - Discipline - Supply Chain
  - Discipline - Technology Transfer
  - Discipline - Trade
  - Discipline - Workforce Development
  - Industry - Aerospace
  - Industry - Agriculture
  - Industry - Automotive
  - Industry - Chemical
  - Industry - Electronics
  - Industry - Food Processing
  - Industry - Healthcare
  - Industry - Medical Devices
  - Industry - Pharmaceutical
  - Industry - Plastics
  - Industry - Transportation

Resume:  Browse...

Submit

**Edit your skills information and click submit**

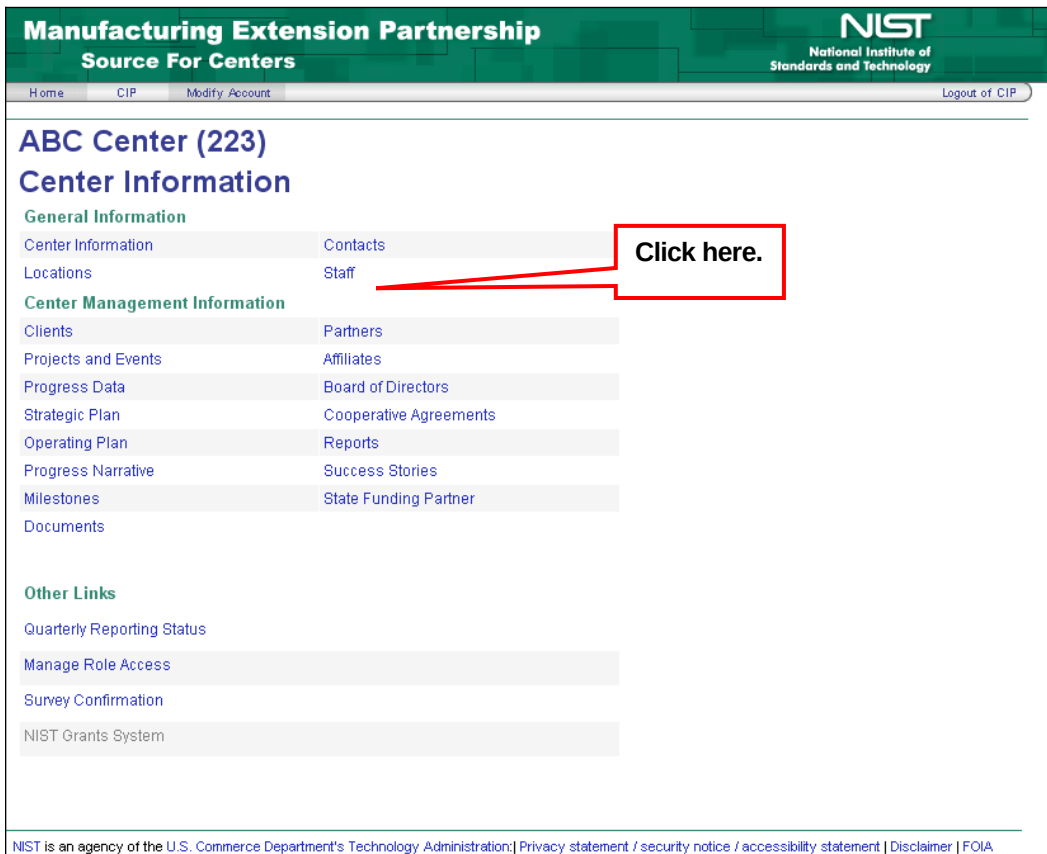
*Procedure for Reviewing the List of Registered Staff Members*

The Center staff member reviewing the Staff list must be assigned the Center Reporting Role in order to review the list. See section 2.4 of this document for instructions on how to assign roles.

The person assigned the Center Reporting Role is required to review the list once per quarter. The following procedure will provide step-by-step instructions for the designated Center Staff member to review the list of registered Staff members.

- 15) Select **Staff** from the Center Information Page as shown in figure 3.12-6. For instructions on navigating to the Center Information Page, refer to the section entitled NIST MEP Source for Centers Web Site and Center Information Page.

Figure 3.12-6: Center Information Page, Staff Link





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- 16) Your Center's Registered Staff member listing will appear. Review the Staff listing to ensure that each and every record is for an employee or partner of the center. Click on the employee to open the employee's record and review their information.
- 17) To remove a staff member, click on the remove checkbox as shown in Figure 3.12-7. Centers may request that a staff member's account be removed from the list at any time (not just during quarterly reporting). Please allow 1-2 business days for account removal.
- 18) Finally, click the **Submit For Reporting** button as shown in figure 3.12-7. The Quarterly Reporting Status will be updated to indicate quarterly reporting guidelines have been met.

Figure 3.12-7: Staff Review

The screenshot shows the 'Alaska Manufacturing Staff Review' page. The header includes the Hollings Manufacturing Extension Partnership logo and the NIST logo. A navigation menu at the top lists: Home, CIP, Communities, Knowledge, Skills, Successes, Conferences, and Logout. A left sidebar contains various menu items under 'General Information', 'Center Management Information', and 'Other Links'. The main content area features a table of staff members with columns for CIMS ID, Staff Member, Title, Phone, Email, Last Update, and Remove. A 'Submit for Reporting for 2007 Q4' button is located at the bottom of the table. Three red callout boxes with arrows point to specific elements: one to the 'Remove' checkbox of the first staff member, one to the 'Staff Member' column header, and one to the 'Submit for Reporting' button.

CIMS ID	Staff Member	Title	Phone	Email	Last Update	Remove
3986	Chris Buchholdt	Executive Director	907-279-2637 x.330	chris@ak-mep.org	03/13/2008	<input type="checkbox"/>
4100	Eric Downey	Business Development Manager	907-777-7331	eric@ak-mep.org	03/12/2008	<input type="checkbox"/>
4509	Bobette Kramer	Operations Manager	907-279-2637	bobbyjo@ak-mep.org	03/17/2008	<input type="checkbox"/>
5156	Amanda Myers	Administrative Assistant	907-777-7308	amanda@ak-mep.org	10/18/2007	<input type="checkbox"/>
4350	Thomas Myers	Senior Business Consultant	907-223-0515	tom@ak-mep.org	10/15/2007	<input type="checkbox"/>
5111	Robert Patrick	Project Manager	907-777-7306	robert@ak-mep.org	10/16/2007	<input type="checkbox"/>
4820	Derick Temiz	Program Development Coordinator	907-777-7309	derick@ak-mep.org	10/31/2007	<input type="checkbox"/>
4679	John Unruh	Educational Consultant & Course Developer	907-488-2552	john@ak-mep.org	01/15/2008	<input type="checkbox"/>

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## Contacts

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Contacts are composed of center officials with specific duties for which there is the opportunity to correspond as a group. Information about contacts is intended to provide NIST MEP with the required information to effectively communicate with the correct center staff through mailing lists and working groups. Changes made to contacts will be immediately and automatically transferred to the appropriate MEP mailing lists that correspond to those positions.

### *Requirements for Center Contacts*

The center contacts information is required by the terms and conditions of the center's cooperative agreement. Center personnel will review and update their contacts information at least once per quarter.

### *Procedure*

The following procedures will provide step-by-step instructions for centers to update contacts and review the list of contacts each quarter.

The center staff member reviewing the Contacts must be assigned the Center Reporting role in order to update the information. See section 2.4 of this document for more information on assigning roles.

### *Procedure for Reviewing Contacts*

Each quarter, the designated center staff member will review the list of Contacts to make sure that the list is current. The designated center staff member will follow these instructions to review the list of Contacts.

- 19) Center personnel (assigned the Center Reporting role) will log into the MEP Source for Centers site and navigate to the Center Information Page.
- 20) From the Center Information Page select the **Contacts** link as shown in Figure 3.13-1.

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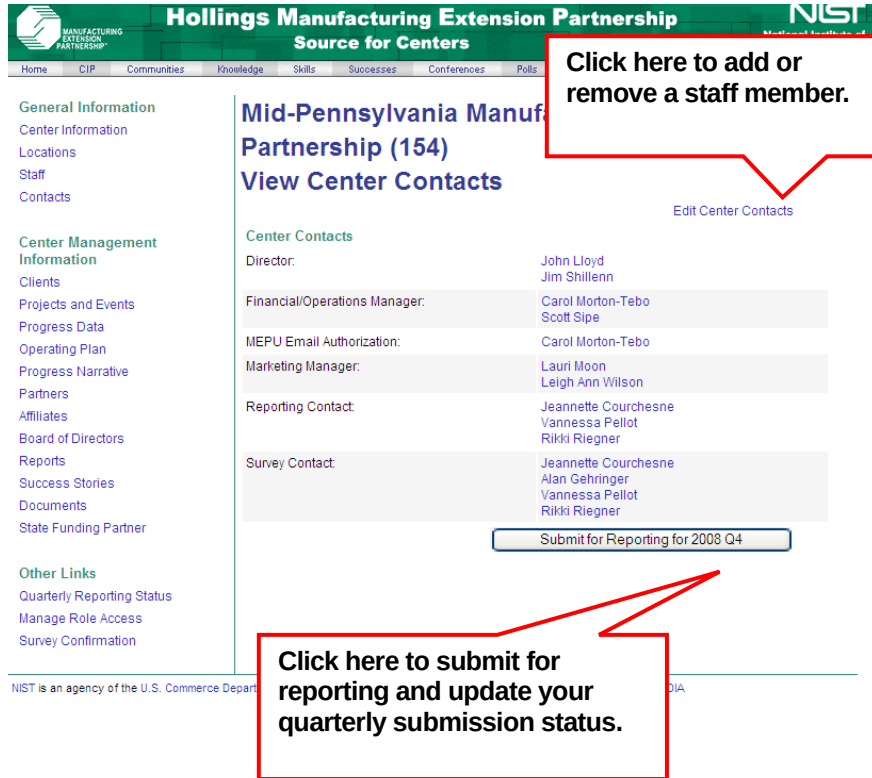
Figure 3.13-11: Center Information Page, Contacts Link

The screenshot shows the 'Alabama Technology Network (165) Center Information' page. The page header includes the 'Hollings Manufacturing Extension Partnership Source for Centers' logo and the 'NIST National Institute of Standards and Technology' logo. A navigation menu contains links for Home, CIP, Communities, Knowledge, Skills, Successes, Conferences, Polls, My Account, and Logout. The main content area is titled 'Alabama Technology Network (165) Center Information' and is divided into several sections: 'General Information' (with links for Center Information and Contacts), 'Locations' (with a link for Staff), 'Center Management Information' (with links for Clients, Partners, Projects and Events, Affiliates, Progress Data, Board of Directors, Operating Plan, Reports, Progress Narrative, Success Stories, and State Funding Partner, Documents), and 'Other Links' (with links for Quarterly Reporting Status, Manage Role Access, and Survey Confirmation). A red callout box with the text 'Click here.' points to the 'Contacts' link in the 'General Information' section. At the bottom of the page, there is a footer with the text: 'NIST is an agency of the U.S. Commerce Department: Privacy statement / security notice / accessibility statement | Disclaimer | FOIA'.

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- 21) Review the list of Contacts to ensure that each and every name listed is correct.
- 22) Click the Edit Center Contacts link to add or remove a staff member from the contact group. See Figure 3.13-3 below for more information.
- 23) After reviewing the list of Contacts, the designated staff member must click the **Submit For Reporting** button in order to update the Quarterly Reporting Status to indicate quarterly reporting guidelines have been met. See figure 3.13-2.

Figure 3.13-12: View Center Contacts



- 24) The Edit Center Contacts page will appear. Currently selected users are shown on this screen. Click on the Select button to add or remove a staff member. Groups may contain multiple staff members. See Figure 3-13-4 below.

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Figure 3.13.-3: Edit Center Contacts

- 25) All registered staff members will be shown. Select and unselect users by placing a check in the checkbox next to each member's name. Remember to click on Set Selected Contacts button to add them to the group.

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Figure 3.13-4: Center Contact Members Selection

**Hollings Manufacturing Extension Partnership** **NIST**  
**Source for Centers**

Home CIP Communities Knowledge Skills Successes Conferences

**Alabama Technology Network**  
**Center Contact Members Selection**  
Center Contact Group: Director  
Note: Check/uncheck boxes to select contact group members.

Select All Unselect All Reset Set Selected Contacts

	CIMS ID	Staff Member
<input type="checkbox"/>	4624	Chris Anderson
<input type="checkbox"/>	4651	Mark Ausbeck
<input checked="" type="checkbox"/>	3904	Michael Bailey
<input type="checkbox"/>	2677	Greg Barnett
<input type="checkbox"/>	299	Brett Bendall
<input type="checkbox"/>	681	Gregg Bennett
<input type="checkbox"/>	4969	Doug Blackmon
<input type="checkbox"/>	4597	Jon Bowen
<input type="checkbox"/>	2614	Nancy Boyd
<input type="checkbox"/>	5253	Amy Brabham
<input type="checkbox"/>	5251	Shirley Buchanan
<input type="checkbox"/>	740	Henry Burdg
<input type="checkbox"/>	3653	Paula Byrd
<input type="checkbox"/>	3014	Kelley Carden

Check/uncheck checkboxes to add/remove staff members. Click here to save changes.

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*Field Descriptions for Center Contacts*

Table 3.13-4: Center Contacts Field Descriptions

Field Name	Instructions	Example
<b>Center Officials</b>		
Director (Required)	Choose the Center Director's name from list. Only those center staff members who are registered users of MEP Source for Centers will be available in list.	Hunter Vardman
Financial/Operations Manager (Required)	Choose the Financial/Operations Manager's name from list. Only those center staff members who are registered users of MEP Source for Centers will be available in list.	Gregg Bennett
MEPU Email Authorization (Required)	Choose name of person to authorize MEPU course registrations from the list. Only those center staff members who are registered users of the MEP Source for Centers will be available in the list.	Joe Smith
Marketing Manager (Required)	Choose the Marketing Manager's name from list. Only those center staff members who are registered users of MEP Source for Centers will be available in list.	Christie Cain
Reporting Contact (Required)	Choose the name of person responsible for Reporting from list. This person will serve as the center contact for NIST MEP for reporting. Only those center staff members who are registered users of MEP Source for Centers will be available in list.	Henry Burdg, Dana Stone
Survey Contact (Required)	Choose the name of person responsible for the Survey from list. This person will serve as the center contact for the survey house and NIST MEP for survey-related questions and issues. Only those center staff members who are registered users of MEP Source for Centers will be available in list.	Henry Burdg, Dana Stone

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## Success Stories

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Success Stories describe assistance projects undertaken by centers in a variety of industries and geographic locations across the country. These stories reflect the variety and depth of these projects, as well as the actual impacts companies are realizing as a result. New stories are added on an ongoing basis. Centers should choose stories that best describe the value and quality of their services to clients. The stories will include background information on the entire scope of each assistance project including the company information, industry type, the specific challenges faced by the client, the impact of the assistance provided by the center and client testimonial, if available.

Research and experience tell us that Success Stories are among the most effective way to communicate the value of MEP services. Success Stories are used to share experiences, and to communicate the value of MEP's services to stakeholders and potential clients, and are often used as part of presentations for the budgeting process to demonstrate the effectiveness of the system and how it operates. In addition, NIST and MEP create promotional materials using Centers' Success Stories that best describe the value and quality of their services to potential clients.

The Centers are responsible for the quality of all Success Stories. The basic process for submitting Success Stories will be as follows:

17. Each time the center submits a Success Story; a NIST MEP staff person will review the material. A story may be accepted or rejected. A story is accepted if it meets all of the requirements and if it is well written. A story will be rejected if it is missing required information, or if it is not well written. See the requirements section below and the field description section for more information.
18. If the story is rejected, the center staff person assigned the Center Reporting Role will be notified by e-mail within 15 days of submission and given the reason(s) for rejection. The center will then edit the story online from the Center Information Page and submit it again. If the story is accepted, the center staff person assigned the Center Reporting Role will be notified of the acceptance by e-mail within 15 days of submission
19. There will be two separate versions of a Success Story. One will be submitted to the Center Information Page, which will serve as a record that the center met its reporting requirements. The second copy will be created in the Success Stories database, which will become the working copy that will be edited by NIST MEP for Success Story publication. After a story has been edited, the two copies will not match. Centers will not be allowed to directly edit a story from the Center Information Page after it has been accepted.
20. NIST MEP will review and edit the story if necessary. The story will be showcased within 45 days after acceptance and made available on the MEP Source for Centers site (<http://www.mepcenters.nist.gov>) and on the MEP Public Site (<http://www.mepcenters.nist.gov>) by clicking on the Success Stories link.
21. NIST MEP will determine if the story is one of the "Best of the Best." If so, the story will be "Highlighted" on the NIST MEP Public website (<http://www.mep.nist.gov>) and will include the testimonial from the client.



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### *Requirements*

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Each center is required to submit one (1) Success Story per quarter. Before submitting a Success Story for public use, the center must obtain the client's written approval to release the information contained in the story. Client approval will give the center permission to release information about the client company to the public. Therefore, all stories submitted will be used without requiring a follow-up approval by the center.

#### *Criteria For Success Stories*

Success Stories will be based on projects or events (refer to section 3.4 for definitions) that were completed with small manufacturing establishments (manufacturing establishments with fewer than 500 employees and must not appear on the Fortune 500 list of companies) within the last two calendar years. The primary NAICS codes of the SMEs must be between 311 and 339. Stories with clients in NAICS Code 54171 will also be accepted.

### *Procedure*

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The following procedure will provide the center with step-by-step instructions on how to submit and edit Success Stories.

**NIST MEP encourages centers to create Success Stories using a word processing program and then cut and paste the information into the online form. It is generally not a good idea to compose long narratives on a Web page since a network problem could cause you to lose information before you have saved your work.**

#### *Procedure for Submitting Success Stories*

The following procedure will provide step-by-step instructions on how to enter new Success Stories on the Center Information Page.

The center staff member submitting the Success Stories must be assigned the Center Reporting role before they may submit the story to NIST MEP. See section 2.4 of this document for instructions on how to assign roles.

Navigate to the Center Information Page (refer to the MEP Source for Centers website and Center Information Page for instructions).

22. From the Center Information Page select the **Success Stories** link as shown in Figure 3.14-1.

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Figure 3.14-13: Center Information Page, Success Stories Link

The screenshot shows the website interface for the Hollings Manufacturing Extension Partnership. The header includes the logo for the Manufacturing Extension Partnership and NIST (National Institute of Standards and Technology). A navigation menu contains links for Home, CIP, Communities, Knowledge, Skills, Successes, Conferences, Polls, My Account, and Logout. The main content area is titled "Alabama Technology Network (165) Center Information". It is divided into two main sections: "General Information" and "Center Management Information".

General Information	
Center Information	Contacts
Locations	Staff

Center Management Information	
Clients	Partners
Projects and Events	Affiliates
Progress Data	Board of Directors
Operating Plan	Reports
Progress Narrative	Success Stories
State Funding Partner	Documents

A red callout box with the text "Click here." points to the "Success Stories" link in the "Progress Narrative" row of the "Center Management Information" table.

Other Links section includes: Quarterly Reporting Status, Manage Role Access, and Survey Confirmation.

At the bottom, a footer states: "NIST is an agency of the U.S. Commerce Department: Privacy statement / security notice / accessibility statement | Disclaimer | FOIA"

23. Click on the link "Compose Success Story" to compose a new Success Story. See Figure 3.14-2.

Figure 3.14-14: Success Stories

**Hollings Manufacturing Extension Partnership**  
 Source for Centers

**Alabama Technology Network Success Stories**

[Click here to compose a new story.](#)

[Compose Success Story](#)

CIMS ID	Reporting Period	Company	Status	Last Updated
135	2000 Q2 (04/01/2000 - 06/30/2000)	Nightingale Uniform Company Inc.	Final	12/11/2003 by Administrator
739	2000 Q3 (04/01/2000 - 06/30/2000)	McGriff Treading Inc	Final	12/11/2003 by Administrator
469	2000 Q4 (07/01/2000 - 09/30/2000)	Hydro Aluminum Inc.	Final	12/11/2003 by Administrator
320	2000 Q4 (10/01/2000 - 12/31/2000)	Progress Rail Services Corp (HQ)	Final	12/11/2003 by Administrator
329	2001 Q1 (01/01/2001 - 03/31/2001)	Oris Automotive Parts AL, Ltd.	Final	12/11/2003 by Administrator
361	2001 Q2 (04/01/2001 - 06/30/2001)	Reliable Plastic Seals Inc.	Final	12/11/2003 by Administrator
702	2001 Q2 (04/01/2001 - 06/30/2001)	Valley Rubber Inc	Final	12/11/2003 by Administrator
391	2001 Q3 (07/01/2001 - 09/30/2001)	ABC Office Furniture	Final	12/11/2003 by Administrator
498	2001 Q3 (07/01/2001 - 09/30/2001)	Sims Bark Company Inc	Final	12/11/2003 by Administrator
		Deep Rock Manufacturing Company Inc	Final	12/11/2003 by Administrator
		Axsys Technologies Inc - Precision Machined Products	Final	12/11/2003 by Administrator

**Click here to view this story.**

24. The Compose Success Story link will lead the user to the input screen as shown below in Figures 3.14-3 and 3.14-4.
25. Copy and paste your Success Story into the appropriate text box shown in Figures 3.14-3.
26. Click the **Search Client/Project** to select the CIMS Client and Project/Event IDs. An "\*" can be used as a wildcard search (e.g., A\* returns all clients beginning with an "A". Please do not use complicated searches like AND, OR, XOR...). If you do not use an "\*" as a wildcard your search criteria will be an exact match. For example ACME and ACME Corporation – to find both use ACME\*. See Figures 3.14-4 and 3.14-5 for more information on searching.
27. Select the **Reporting Period** from the drop down list.
28. Click on the **Submit** button to save your story to edit later. Click the **Submit For Reporting** button to send your story to NIST MEP.

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Figure 3.14-3: Compose Success Story

**Click here to search for the client.** An "\*" can be used as a wildcard search (e.g., A\* returns all clients beginning with an "A". Please do not use complicated searches like AND, OR, XOR...). If you do not use an "\*" as a wildcard your search criteria will be an exact match. For example ACME and ACME Corporation – to find both use ACME\*

**Hollings Manufacturing Extension Partnership**

Home CIP Communities Knowledge Skills

**General Information**  
Center Information  
Locations  
Staff  
Contacts

**Center Management Information**  
Clients  
Projects and Events  
Progress Data  
Operating Plan  
Progress Narrative  
Partners  
Affiliates  
Board of Directors  
Reports  
Success Stories  
Documents  
State Funding Partner

**Other Links**  
Quarterly Reporting Status  
Manage Role Access  
Survey Confirmation

### Alabama Compose Success Story

Success Story

Note: \* denotes that the field is required.

**Client Information**

CIMS Client ID \*

Client Name:

Client ID:

CIMS Project/Event ID \*

Project Name:

Project/Event ID:

Has the client provided approval to use this information in a Success Story? \*

**Success Story**

Reporting Period: 2008-4

Success Story Title \*

**Company Profile \***

**Situation \***

**Solution \***

**Results \***

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The screenshot shows a web form for providing a testimonial. It includes fields for 'Name of Person Providing Testimonial' and 'Title of Person Providing Testimonial'. Below these is a large text area labeled 'Testimonial'. At the bottom of the form are two buttons: 'Submit' and 'Submit for Reporting for 2008 Q4'. Two red callout boxes are present. The first callout box, pointing to the 'Submit' button, contains the text: 'Click Submit to test the validation and save your submission. NOTE: the submission is not final and does not count as a completed submission.' The second callout box, pointing to the 'Submit for Reporting for 2008 Q4' button, contains the text: 'Click submit for reporting to finalize the submission and update reporting status.'

Figure 3.14-4: Client Search

The figure consists of two screenshots of a web application interface. Both screenshots show a browser window with a menu bar (File, Edit, View, History, Bookmarks, Tools, Help) and a title bar. The main content area of both windows displays 'Alabama Technology Network (165)' and 'Search for Projects/Events'. The first screenshot shows a search input field containing 'Acme\*' and radio buttons for 'Company Name' (selected) and 'CIMS Client ID'. The second screenshot shows a search input field containing '39999' and radio buttons for 'Company Name' and 'CIMS Client ID' (selected).

Figure 3.14-5: Search Help

The screenshot shows a browser window with a menu bar (File, Edit, View, History, Bookmarks, Tools, Help) and a title bar. The main content area displays the heading 'How to Search' followed by a bulleted list of search instructions:

- ◆ Searching is limited to a simple search "contains".
- ◆ You may use an asterisk "\*" as a wildcard.
- ◆ When searching for a record based on ID, the ID must be in the format of a number.
- ◆ Do not include operators such as AND, AND NOT, or OR as they are not understood.
- ◆ Sample searches follow to locate client record ABC Office Supply  
Valid - A\*, \*Office\*, \*Supply  
Invalid - Office and Supply, ABC or BCD

*Procedure for Editing Success Stories*

The following procedure will provide step-by-step instructions on how to edit success stories on the Center Information Page.

- 1) From the Center Information Page select the Success Stories link as shown above in Figure 3.14-1.

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- Next, click on the Reporting Period you want to edit. See Figure 3.14-6 below. Only success stories with a status of "Passed" or "In-Process" can be edited. Stories with a status of "Final" cannot be modified.

Figure 3-14-6: Success Stories

**Hollings Manufacturing Extension Partnership**  
 Source for Centers

NIST  
 National Institute of Standards and Technology

Home CIP Communities Knowledge Skills Successes Conferences Polls My Account Logout

**Alabama Technology Network (165)**  
 Success Stories [Compose Success Story](#)

CIMS ID	Reporting Period	Company	Status	Last Updated
	2007 Q4 (10/01/2007 - 12/31/2007)	ABC Manufacturing	Passed	03/21/2008 by Kathy Long
135	2000 Q2 (04/01/2000 - 06/30/2000)	Nightingale Uniform Company Inc.	Final	12/11/2003 by Administrator
739	2000 Q2 (04/01/2000 - 06/30/2000)	McGriff Treading Inc	Final	12/11/2003 by Administrator
469	2000 Q3 (07/01/2000 - 09/30/2000)	Hy Aluminum Inc.	Final	12/11/2003 by Administrator
925	2000 Q3 (07/01/2000 - 09/30/2000)	Progress Services Co	Final	12/11/2003 by Administrator
13	2000 Q4 (10/01/2000 - 12/31/2000)	Oris Automotive Parts AL, Ltd.	Final	12/11/2003 by Administrator
326	2000 Q4 (10/01/2000 - 12/31/2000)	Reliable Plastic Seals Inc.	Final	12/11/2003 by Administrator
329	2001 Q1 (01/01/2001 - 03/31/2001)	Valley Rubber Inc	Final	12/11/2003 by Administrator
361	2001 Q2 (04/01/2001 - 06/30/2001)	ABC Office Furniture	Final	12/11/2003 by Administrator
702	2001 Q2 (04/01/2001 - 06/30/2001)	Sims Bark Company Inc	Final	12/11/2003 by Administrator
391	2001 Q3 (07/01/2001 - 09/30/2001)	Deep Rock Manufacturing Company Inc	Final	12/11/2003 by Administrator

**Click on reporting period to edit.**

**Note that this story cannot be edited again. It has been finalized and accepted by NIST MEP.**

- The story will be shown. Click on the Edit Success Story link as shown in Figure 3.14-7 below.

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Figure 3.14-7: View Success Story

The screenshot displays the 'View Success Story' interface. The header includes the 'Hollings Manufacturing Extension Source for Centers' logo and the 'NIST National Institute of Standards and Technology' logo. The navigation menu on the left is organized into sections: General Information, Center Management Information, and Other Links. The main content area shows the following details:

Success Story	
CIMS ID:	2
Client Information	
CIMS Client ID:	58857
Client Name:	ABC Manufacturing
Client ID:	3341KL
CIMS Project/Event ID:	27300
Project Name:	Lean Manufacturing Overview
Project/Event ID:	KLTEST2
Has the client provided approval to use this information in a Success Story?:	Yes
Success Story	
Reporting Period:	2007-4
Success Story Title:	ABC Manufacturing Implements Lean Manufactuirng Practices
Company Profile	
Testing company profile.	
Situation	
Client's business situation.	

A red callout box with the text 'Click here to open the story in edit mode.' points to the 'Edit Success Story' link located in the top right corner of the main content area.

- 4) Edit the story as necessary. When done, click the submit button to save your work and edit later or click the Submit for Reporting button to send you story to NIST MEP for review and update your quarterly reporting status. See Figure 3.14-8 below.

Figure 3.14-8: Edit Success Story

**Hollings Manufacturing Extension Partnership**  
Source for Centers

NIST  
National Institute of Standards and Technology

Home CIP Communities Knowledge Skills Successes Conferences Polls My Account Logout

**Alabama Technology Network (165)**  
**Edit Success Story**

Success Story

Note: denotes that the field is required.

CIMS ID: 2

**Client Information**

CIMS Client ID : 58857

Client Name: ABC Manufacturing

Client ID: 3341KL

CIMS Project/Event ID : 27300

Project Name: Lean Manufacturing Overview

Project/Event ID: KLTEST2

Has the client provided approval to use this information in a Success Story? :

**Success Story**

Reporting Period: 2007-4

Success Story Title : ABC Manufacturing Implements Lean Manufac

**Company Profile**

Testing company profile.

**General Information**  
Center Information  
Locations  
Staff  
Contacts

**Center Management Information**  
Clients  
Projects and Events  
Progress Data  
Operating Plan  
Progress Narrative  
Partners  
Affiliates  
Board of Directors  
Reports  
Success Stories  
Documents  
State Funding Partner

**Other Links**  
Quarterly Reporting Status  
Manage Role Access  
Survey Confirmation



Figure 3.14-8: Edit Success Story (Continued)

**Solution**

Describe the solution the center provided for the problems identified above.

**Results**

What were the results of the project(s) with the client.

Name of Person Providing Testimonial:

Title of Person Providing Testimonial:

**Testimonial**

This center has done a fabulous job in helping improve our business and stay in business. We created 50 jobs and save 20!

**Record History**

Created On/By: 03/21/2008 by Kathy Long

Updated On/By: 03/21/2008 by Kathy Long

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**Field Descriptions for Success Stories**

Table 3.14-5: Field Descriptions for Success Stories

Field Name	Instruction(s)	Example(s)	Notes
CIMS Client ID (Required)	Select from the dropdown.		The Client ID must have been reported to NIST MEP.
CIMS Project/Event ID (Required)	Select from the dropdown.		The Project/Event ID must have been reported to NIST MEP.
Company approval (Required)	Mark the checkbox if the client company has approved the use of their information in a Success Story. The story cannot be submitted unless this box is checked.	✓	
Reporting Period	Select year and quarter from the drop down list.		
Success Story Title (Required)	In one line of text, briefly describe Success Story. This field cannot be blank.	BUERK TOOL IMPROVES PRODUCTION	Title typically includes name of CME.
Company Profile (Required)	Briefly describe CME. Include such items as company name, city, size, (number of employees, average annual sales), age (date founded, or years of operation), product characteristics (family owned, branch plant), customer base (in customer terms). Nature of competition and market share if available. This field cannot be blank.	Buerk Tool and Machine Co., founded in 1919, is a family-run, general-purpose machine shop that produces precision machine tool components for original equipment manufacturers in Western New York. Buffalo, New York	Company Profile is typically a single paragraph and includes the following information: name, products, customer base, ownership, number of facilities, founded date, sales, place of business, and number of employees.

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Field Name	Instruction(s)	Example(s)	Notes
Situation (Required)	Briefly describe issue or problem for CME. Include what brought the company to the center – the conditions leading to service (needed new technology, plant flow problems, performance, market conditions). Include how the center-client relationship was started. This field cannot be blank.	company employs 14 people.  Buerk Tool faced a changing marketplace and increasing pressure to meet advanced manufacturing techniques used by its competition. Company needed help addressing some operational issues and contacted its local NIST MEP Network affiliate, Western New York Technology Development Center (WNYTDC), for assistance.	Situation should describe context or background of how client arrived in current situation and should include extent of challenges and/or consequences facing client.
Solution (Required)	Briefly describe solution(s) that were developed between client and center. Describe how the center addressed the situation. What type of service was provided? Was the problem as expected or did the center help bring a different perspective to the client? Did the center bring in additional resources? Summarize the actions that were taken. This field cannot be blank.	WNYTDC established a working team to assess Buerk Tool's operation. With data collected from plant visits and team meetings, WNYTDC recommended several changes in company's shop floor layout, material handling, and housekeeping procedures.  WNYTDC developed two alternative plant layouts with machine placement reflecting movement of typical jobs through shop. The new layout Buerk selected reduced movement of an average job through the shop by about 30 percent.  As a result of WNYTDC's assistance, Buerk reduced production costs by improving its process flow. changes increased available floor space by 1,360 square feet, providing space for needed machinery and improving overall shop safety by clearing aisles. Improved work flow reduced production time and costs, allowing company to give employees a 15 percent bonus and a 5 percent wage increase, which helped boost employee morale. In addition, sales increased by 20 percent to a record \$1.4 million.	Solution can be a chronological account of process or a description of Center's analysis and solution applied to client's situation.
Results (Required)	Enter measurable impact(s) of implementing Solution. Please try to quantify actual results. Include changes in manufacturing practices such as materials usage, plant layout, manufacturing processes, introduction of new technology, workforce training/performance, quality control processes, additional investments, etc. Include changes in company performance such as reduced scrap/defect rates, improved on-time delivery performance, lower customer reject rates, increased capacity utilization, reduced setup times, improved productivity, shorter lead time, lower inventory levels, higher inventory turns, attainment of quality control standards, new product development/introduction, improved product performance, etc. This field cannot be blank.	<ul style="list-style-type: none"> <li>• Increased sales by 20 percent to a record \$1.4 million.</li> <li>• Reduced production costs.</li> <li>• Improved overall shop safety.</li> <li>• Increased available floor space by 1,360 square feet.</li> <li>• Gave employees a 15 percent bonus and a 5 percent wage increase.</li> <li>• Boosted employee morale.</li> </ul>	

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Field Name	Instruction(s)	Example(s)	Notes
Testimonial Name	Enter name(s) of person(s) that provided Testimonial. Enter first and last names.	Dick Buerk	
Testimonial Title	Enter position or capacity of person that provided Testimonial.	President	
Testimonial	Enter a quotation or an endorsement provided by an individual within client company concerning the value of services provided by center.	"Without assistance of Western New York Technology Development Center (WNYTDC) nothing would have happened. We would have continued repeating same behaviors and expecting new outcomes."	

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## **State Funding Partners**

---

The State Funding Partners entries are intended to provide the center a readily available mechanism for reporting on its relationships with State and Local Government Officials. State Funding Partners are the primary funding decision officials for the program within the state or local government for the center.

### ***Requirements for State Funding Partners***

---

The State Funding Partners information is required by the terms and conditions of the Center's Cooperative Agreement. Center personnel will review and update their State Funding Partners information at least once per quarter.

### ***Procedures***

---

The following procedures will provide step-by-step instructions for centers to add new State Funding Partners entries, review the list of State Funding Partners, and delete State Funding Partners each quarter.

#### ***Procedure for Adding New State Funding Partners Entries***

The following procedures will guide center staff members through the process of adding new information about State Funding Partners.

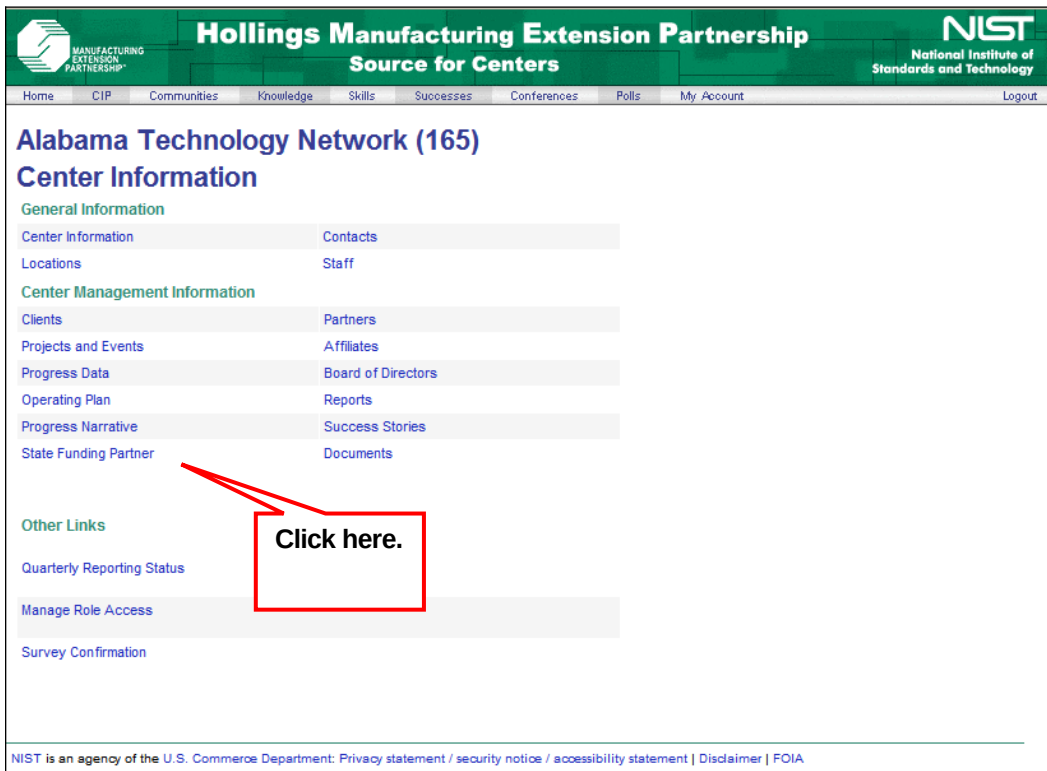
The Center staff member adding State Funding Partners must be assigned the Center Reporting role before they may submit data to NIST MEP. See section 2.4 of this document for instructions on how to assign roles.

Centers will enter information about State Funding Partners into predefined text fields by doing the following:

Center personnel (assigned the Center Reporting role) will log into the MEP Source for Centers site and navigate to the Center Information Page.

29. From the Center Information Page, click on the link for **State Funding Partners** as shown in Figure 3.15-1 below.

Figure 3.15-15: Center Information Page, State Funding Partners Link



30. A list of the Center's State Funding Partners will appear. Click on the link **Compose New State Funding Partners** to create a new State Funding Partners record as shown in Figure 3.15-2.

Figure 3.15-16: State Funding Partners, Compose New State Funding Partners Link



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**Hollings Manufacturing Extension Partnership**  
 Source for Centers

**Alabama Technology Network (165)**  
 State Funding Partners

CIMS ID	Name	Organization	Remove
252	Bradley Byrne	Alabama Dept. of Postsecondary Education	<input type="checkbox"/>

Submit for Reporting for 2008 Q4

**Click here to review a state official's information.**

**Click here to submit funding partners and update Quarterly Reporting Status.**

**Click here to remove a funding partner.**

31. If composing a new State Funding Partner, the designated center personnel will enter information into predefined text fields. You may choose to create a user account for state officials to view information about your center. User account choices are "Do not use", "Use existing", and "Create new". See Figure 3.15-3 below for more information.
32. Click on the **Submit** button to save your work.

Figure 3.15-3: Compose New State Funding Partners Form

**Hollings Manufacturing Extension Partnership**  
 Source for Centers

**NIST**  
 National Institute of Standards and Technology

Home CIP Communities Knowledge Skills Successes Conferences Polls My Account Logout

**Alabama Technology Network (165)**  
**Compose New State Funding Partner**

**State Funding Partner**  
 Note: \* denotes that the field is required.

User Account:  
 Do not use  
 Use existing  
 Create new

Salutation:

First Name:

Last Name:

Organization Name:

Title:

**Contact Information**

Address 1:

Address 2:

City:

State:

ZIP:

Phone:

Fax:

Email:

**Record History**

Created On/By:

Updated On/By:

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*Reviewing State Funding Partners*

Each quarter the designated center staff member will review the list of state funding partners to make sure that the list is current. The designated center staff member will follow these instructions to review the list of state funding partners.

From the Center Information Page, click on the link for State Funding Partners. See Figure 3.15-1 above.

A list of the center's state funding partners will appear. Open each record and review the information listed. See Figure 3.15-2 above.

After reviewing the list of State Funding Partners, click the **Submit For Reporting** button in order to update the Quarterly Reporting Status to indicate quarterly reporting requirements have been met. See figure 3.15-2 above.

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*Deleting State Funding Partners*

The following procedure will provide centers with step-by-step instructions for deleting State Funding Partners entries.

The Center staff member deleting State Funding Partners entries must be assigned the Center Reporting role before they may edit the entries. See section 2 of this document for instructions on how to assign roles.

From the Center Information Page, click on the link for **State Funding Partners**. See Figure 3.15-1 above.

33. The list of State Funding Partners will appear. Check the **Remove** box of the **State Funding Partner** you want to delete. See Figure 3.15.1 above.
34. Click the Submit for Reporting button in order to save the changes and update your quarterly reporting status to indicate quarterly reporting requirements have been met. See Figure 3.15-2 above.



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**Field Descriptions**

Table 3.15-6: State Funding Partners Field Descriptions

Field Name	Instructions	Example
User Account	Choices relate to SFC ID and information. Choices are: Do not use SFC, Have existing SFC, or Create a new SFC account.	Use Existing
Salutation	Enter State Funding Partner's salutation.	Mr.
Last Name (Required)	Enter State Funding Partner's last name.	Doe
First Name (Required)	Enter State Funding Partner's first name.	John
Organization Name (Required)	Enter State Funding Partner's organization name.	Department of Commerce
Position (Required)	Enter State Funding Partner's position in organization.	President
Address 1 (Required)	Enter street address of the State Funding Partner.	100 Bureau Drive
Address 2 (Required)	Enter street address of the State Funding Partner.	Suite C100
City (Required)	Enter name of city where State Funding Partner organization is located.	Gaithersburg
State (Required)	Choose name of state where State Funding Partner organization is located (from drop-down-menu).	Maryland (MD)
Zip (Required)	Enter zip code where State Funding Partner organization is located.	20899-4800
Phone (Required)	Enter telephone number for State Funding Partner.	907-258-4250
Fax (Required)	Enter fax number for State Funding Partner.	907-258-4255
E-mail (Required)	Enter e-mail address for State Funding Partner.	statepartner@organization.gov

## Center Information

Center Information is intended to provide NIST MEP with general contact information such as center address, telephone number, fax number, and e-mail address. MEP will use this information in communications with stakeholders and for publishing Center information in marketing materials and web sites. The basic process for submitting this information follows.

### Requirements for Center Information

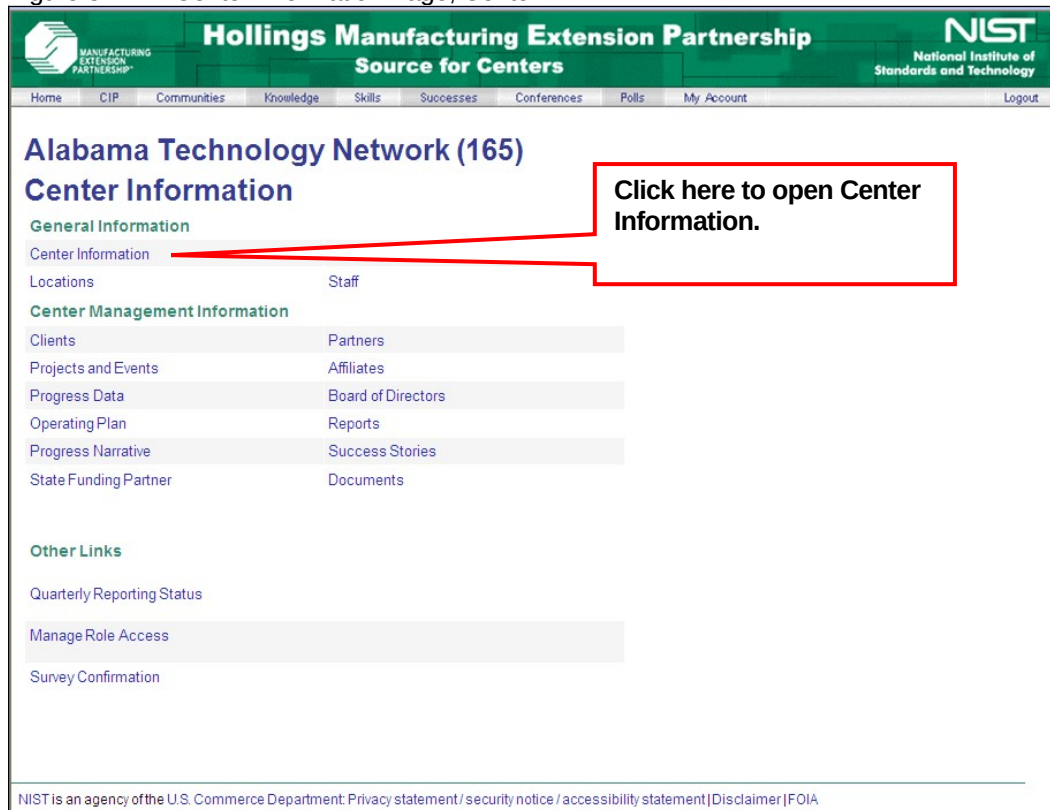
Center Information is required by the terms and conditions of the Center’s Cooperative Agreement. Center personnel will review and update their Center Information at least once per quarter.

### Procedures for Reviewing and Updating Center Information

The center staff member with the Center Reporting role is responsible for reviewing and updating the Center Information. See section 2.4 of this document for more information on the Center Reporting role. The following procedures will provide step-by-step instructions for the designated center personnel to review and edit their Center Information.

- 26) Center personnel (assigned the Center Reporting role) will log into the MEP Source for Centers site and navigate to the Center Information Page.
- 27) From the Center Information Page select the **Center Information** link as shown in Figure 3.2-1.

Figure 3.2-17: Center Information Page, Center



- 28) To update your Center Information, click on the hyper-link “**Edit Center Information**”.

Figure 3.2-18: Center Information read only.

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**General Information**

- Center Information
- Locations
- Staff
- Contacts

**Center Management Information**

- Clients
- Projects and Events
- Progress Data
- Operating Plan
- Progress Narrative
- Partners
- Affiliates
- Board of Directors
- Reports
- Success Stories
- Documents
- State Funding Partner

**Other Links**

- Quarterly Reporting Status
- Manage Role Access
- Survey Confirmation

## Alabama Technology Network (165) View Center Information

[Edit Center Information](#)

**Center Information**

**Description**

Serving firms throughout Alabama via 15 regional centers  
SMEs in Service Area: 4800

Click here to edit your data.

**Contact Information**

Address 1: 500 Beacon Parkway  
Address 2:  
City: Birmingham  
State: AL  
ZIP: 35209  
Phone: 205-943-4808  
Fax: 205-943-4813  
Email: mbailey@atn.org  
Center Website: http://www.atn.org/

Click here to satisfy your reporting requirements (even if data has not changed).

**NIST Officials**

Federal Program Officer: Dan Lilley  
NIST Grants Specialist: Thomas Tucker  
NIST Grants Officer: Joyce Brigham

Submit for Reporting for 2008 Q4

**Record History**

Created On/By: 02/13/2001 by Administrator  
Updated On/By: 10/30/2008 by Dana Stone

- Using table 3.2-1, Field Descriptions, as a reference, the designated center personnel will enter information into predefined text fields as shown in Figure 3.2-3.
- After entering your updates, click the **Submit** button to save your work and edit later. To finalize your updates, click the **Submit for Reporting** button.

Figure 3.2-19: Center Information edit screen

**Alabama Technology Network (165)**  
**Edit Center Information**

**Center Information**  
Note: \* denotes that the field is required.

**Description:** \*

Serving firms throughout Alabama via 15 regional centers or sites.

SMEs in Service Area: 4800

**Contact Information**

Address 1: \* 500 Beacon Parkway West  
Address 2:   
City: \* Birmingham  
State: \* Alabama  
ZIP: \* 35209  
Phone: \* 205-943-4808  
Fax: 205-943-4813  
Email: \* mbailey@atn.org  
Center Website: http://www.atn.org/

**NIST Officials**

Federal Program Officer: Dan Lilley  
NIST Grants Specialist: Thomas Tucker  
NIST Grants Officer: Joyce Brigham

Submit Submit for Reporting for 2008 Q4

**Callout 1:** Edit information as appropriate.

**Callout 2:** Click Submit to save changes or click Submit for Reporting to submit and finalize the submission.

**Field Descriptions**

Table 3.2-7: Field Descriptions for MEP Center Information Record

Field Name	Required?	Instructions	Example
Description	Yes	Enter a short description about Center and area or type of firms they serve.	Serving firms throughout Alaska. Affiliated with Alaska Science and Technology Foundation, Alaska Human Resource Investment Council and University of Alaska Small Business center.
Address 1	Yes	Enter street address of Center.	430 W. 7th Ave.
Address 2	No	Enter street address of Center.	Suite 30
City	Yes	Enter city in which Center is located.	Anchorage
State	Yes	Choose state in which Center or Center location is located.	AK – Alaska
Zip	Yes	Enter five or nine digit zip code of Center.	99501 or 99501-1234
Phone	Yes	Enter main telephone number for Center.	907-258-4250
Fax	No	Enter main fax number for Center.	907-258-4255
Email	Yes	Enter Center's email address.	contact@center.org
Center Website	No	Enter the URL for the Center's Web site.	Http://www.center.org

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## Client Information File

---

The Client Information File (CIF) may contain one record for each manufacturing client the center has worked with during the quarter.

If you have worked with a client that is already in the database, there is no reason to resubmit client information unless contact or client specific information (Homeland Security, Defense Related, etc.) is different.

The survey contractor uses the CIF records for the purpose of conducting a client impact survey. The survey contractor will use the Client Information to contact Client Manufacturing Establishments (CMEs) regarding the impacts of center assistance. CIF records may also be used for other purposes such as market research and National Account activities.

Clients must have valid manufacturing NAICS codes or the 54171 Research and Development NAICS Code. Please see the list of manufacturing NAICS codes, Sectors 31 - 33, at <http://www.census.gov/epcd/naics02/naicod02.htm#N31>.

To accommodate activities associated with technology deployment, we will also accept clients with the NAICS code 54171. These scientific and research development services include establishments engaged in the physical, engineering, and life sciences and are engaged in conducting research and experimental development in the physical, engineering, and life sciences, such as agriculture, electronics, environmental, biology, botany, biotechnology, computers, chemistry, food, fisheries, forests, geology, health, mathematics, medicine, oceanography, pharmacy, physics, veterinary, and other allied subjects. REMINDER: If these activities are reported in the center's CIF/PIF data, these clients will be surveyed.

**Note:** Clients can also be submitted individually by using the Center Information Page client utility (Compose New Client section 3.3.4). If the Center foregoes the opportunity to edit the client record or change client information via the CIP submission process, client data may be updated/corrected as part of the survey data confirmation process (section 4.1.5.3). Requirements for the CIF, the validation process, and submittal process follow.

### Requirements for the Client Information File

---

The CIF must be submitted as an Extensible Markup Language (XML) file. XML is an open standard for describing data. It is an ideal solution for transferring structured data from server-to-client, server-to-server or application-to-application on any platform. It was designed to improve the functionality of the Web by providing more flexible and adaptable information identification.

It is called extensible because it is not a fixed format like HTML (a single, predefined markup language). Instead, XML is actually a metalanguage -- a language for describing other languages, which allows users to customize the markup language for different types of documents.

Unlike HTML, where both the tag semantics and the tag set are fixed [example an <h1> is always a first level heading], XML specifies neither semantics nor a tag set. XML provides a facility to define tags and the structural relationships between them. Since there's no predefined tag set, there can't be any preconceived semantics. All of the semantics of an XML document will either be defined by the applications that process them or by style sheets.

NIST MEP selected XML because it allows for more flexibility in communicating with information systems used by MEP and Centers -- both currently and in the future. XML will also help MEP to collect better quality and more accurate data.

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XML is very simple, but the authoring of XML content can be difficult due to formatting requirements. Although any text editor can be used to create XML documents, there are a variety of specialized text editors (see lists below) that help with formatting. To facilitate the authoring of XML files required for client and project/event submissions, MEP has created an Excel spreadsheet template that contains a macro, which will allow for quick creation of XML files. This tool is intended to help centers that do not have information systems capable of generating the required XML files. Requirements for using the utilities:

- Designed to work with Windows 2000 or later
- Designed to work with Microsoft Office 2000 or later
- Excel macros must be enabled

Instructions for using the templates are included in the Excel file on the Help worksheet. These Excel templates can be downloaded from the Source for Centers website, or you may use commercially available software to generate XML. However, if you choose to use a commercially available utility, please be aware the file format must be the same as that found in Figure 3.3-1 Sample Clients XML file. Centers are responsible to ensure the quality and correct structure of the XML content no matter how the XML is generated. MEP can provide the Data Type Definition (DTD) and/or XML schema definitions for the client submission upon request. However, these should not be used for full validation of XML submissions. Refer to Section 3.3.2 for more information on CIF Validation Process.

Table 3.3-1 : XML Editors

**Note:** NIST MEP does not endorse any of these products. This list is provided to help centers to locate a tool if they choose not to use the Excel template provided by MEP. Microsoft Word and Microsoft Excel [XP versions or later] should **NOT** be used to generate XML because they generate proprietary versions of XML.

Name	Available Free of Charge	Website
XMLSPY 2004	No	<a href="http://www.altova.com/">http://www.altova.com/</a>
XMLmind	No	<a href="http://www.xmlmind.com">http://www.xmlmind.com</a>
Sonic Stylus Studio	No	<a href="http://www.sonicsoftware.com">http://www.sonicsoftware.com</a>
Cooktop	Yes	<a href="http://www.xmlcooktop.com/">http://www.xmlcooktop.com/</a>
Aioob - XML Editor	Yes	<a href="http://www.aioob.com/xmlpage/AioobXMLed.htm">http://www.aioob.com/xmlpage/AioobXMLed.htm</a>
Xray2 XML Editor	Yes	<a href="http://architag.com/xray/">http://architag.com/xray/</a>
Omnimark	No	<a href="http://www.omnimark.com">http://www.omnimark.com</a>

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Figure 3.3-20: Sample Clients.xml file

```

<?xml version="1.0" encoding="UTF-8"?>
<CLIENT_SUBMISSION>
<DATE_PREPARED>2008-3-21</DATE_PREPARED>
<TIME_PREPARED>8:16:57</TIME_PREPARED>
  <CLIENT>
    <ID>123411KL</ID>
    <NAME>ABC Manufacturing</NAME>
    <ADDRESS_1>1234 West End Ave.</ADDRESS_1>
    <ADDRESS_2>Suite 35433</ADDRESS_2>
    <CITY>Eufala</CITY>
    <STATE>AL</STATE>
    <ZIP>32764</ZIP>
    <NAICS_CODE>34111</NAICS_CODE>
    <NUMBER_OF_EMPLOYEES>200</NUMBER_OF_EMPLOYEES>
    <SIZE_COMMENT></SIZE_COMMENT>
    <DUNN_AND_BRADSTREET_NUMBER></DUNN_AND_BRADSTREET_NUMBER>
    <DEFENSE>N</DEFENSE>
    <HOMELAND_SECURITY>N</HOMELAND_SECURITY>
    <STATIONERY_CODE></STATIONERY_CODE>
    <CENTER_PBA_ASSIGNED></CENTER_PBA_ASSIGNED>
    <CONTACT_SALUTATION>Mr.</CONTACT_SALUTATION>
    <CONTACT_LAST_NAME>John</CONTACT_LAST_NAME>
    <CONTACT_FIRST_NAME>Smith</CONTACT_FIRST_NAME>
    <CONTACT_POSITION>President</CONTACT_POSITION>
    <PRIMARY_CONTACT_PHONE>342-498-8566</PRIMARY_CONTACT_PHONE>
    <PRIMARY_CONTACT_PHONE_EXTENSION></PRIMARY_CONTACT_PHONE_EXTENSION>
    <PRIMARY_CONTACT_FAX></PRIMARY_CONTACT_FAX>
    <PRIMARY_CONTACT_EMAIL></PRIMARY_CONTACT_EMAIL>
    <SECONDARY_CONTACT>Michael Johnson</SECONDARY_CONTACT>
    <SECONDARY_CONTACT_PHONE>342-485-4857</SECONDARY_CONTACT_PHONE>
    <SECONDARY_CONTACT_PHONE_EXTENSION></SECONDARY_CONTACT_PHONE_EXTENSION>
    <SECONDARY_CONTACT_FAX></SECONDARY_CONTACT_FAX>
    <SECONDARY_CONTACT_EMAIL></SECONDARY_CONTACT_EMAIL>
    <CENTER_ID>165</CENTER_ID>
  </CLIENT>
</CLIENT_SUBMISSION>

```

Centers may submit client information each quarter as it is updated. By submitting updated client information more frequently, the Survey Confirmation Process (see Section 4.0) will be easier.

OMB Control No. 0693-0032  
 Expiration date: XX/XX/XXXX

*Assigning Unique Client Identifiers*

Unique client identifiers are necessary to conduct the client-based survey. Each CME (client's individual plant location) must be assigned a unique id, which is **permanently** associated with the client and that cannot be recognized as the company name. If a client changes its name, or relocates, they keep the same id that was originally assigned. If a company goes out of business, do not reuse the unique identifier. An example is given in Table 3.3-2.

Table 3.3-2: Example Unique Client Identifiers

Each plant location is assigned a unique client identifier.

CME Name	CME Contact Street Address	CME City	CME_UID
Acme Buckles	4567 West 9 <sup>th</sup> Street	Huntsville	AL-05-30
Alto Products Corp.	4598 East St.	Huntsville	AL-09-11
Boxall	3198 West End Blvd.	Huntsville	AL-10-01
Capitol Vial - Auburn Plant	31 W. 15th St.	Auburn	AL-03-53
Capitol Vial - Auburn Plant	31 W. 15th St.	Auburn	AL-03-53
Capitol Vial - Huntsville Plant	945 South St.	Huntsville	AL-234-89



**CIF Validation Process**

NIST MEP will use a validation process to ensure validity and consistency of CIF records stored in the NIST MEP database. Table 3.3-3 describes the kinds of exceptions centers can expect to receive during the validation process.

Table 3.3-3: CIF Exception Types

Exception	Description
Warning	A possible problem with the data that must be verified but can be accepted by the center as accurate.
Error	A problem with the data that results in the CIF being non-submittable until the error is corrected by the center.

The following four outcomes are possible when an individual or batch submission is performed:

Outcome	Description
One or more errors are detected	Validation is considered as failed. The user receives a printable page with the detailed information regarding validation results and a notice about the failed status of the submission.
One or more errors and one or more warnings are detected	Validation is considered as failed. The user receives a printable page with the detailed information regarding validation results (both, errors and warnings) and a notice about the failed status of the submission.
One or more warnings are detected	Validation is considered as tentatively passed. The user receives a printable page with the detailed information regarding warnings. At this point an option to force submission of client data by suppressing warnings is available.
No errors or warnings are detected	Client submission is accepted. Acknowledging page is displayed.

Client records for submission purposes are identified by Center assigned client IDs. Since client records must be unique within one Center, an attempt to submit a client with an existing client ID results in validation failure (regardless of whether it is an individual or batch submission). No further validation of such record (or batch of records) is performed. Upon successful submission of client data for the new clients a unique numeric CIMS ID (automatically generated by the system) is assigned to client records. These IDs can be easily retrieved by browsing client records on the CIP site or looked-up by generating either the Comprehensive Client List or Potential Client Name/ID Conflicts reports (available on the CIP site on the Client Utility Page under Reports). Although it is possible to continue to refer to clients by their names or center assigned ID, it is very important that future communications between MEP and Centers regarding clients rely only on CIMS generated IDs. This ensures the integrity of data and helps avoid duplication of clients. Validation of client records (during either individual or batch submission) is performed on a record field level or database level. Field level validation ensures that the data entered in all record fields are correct. However, this type of validation does not validate the data against other client data already stored in CIMS databases for the given Center. The latter is achieved through the database validation level. The source of exception conditions does not have any impact on validation results. However, understanding of sources of errors and warnings may help troubleshoot submission problems.

Specific business and system validation rules pertinent to client records are described in the table below. In addition to validation rules spelled out in the table, field level validation error is reported each time and for each field if:

- Field value submitted is null, but the field is marked as required in the table below
- The length of the value submitted exceeds the number specified in the Max Size column in the table below.

Some special characters are not allowed in fields. Special characters are defined as spaces and the following characters:

~!@#\$\$%^&\*()-\_+=\|[]{};:'"<>./?

Table 3.3-4: CIF Validation Criteria

Column	Field Name	Required	Max Size	Allowable Characters	Non-Allowable Characters	Field Validation Rules	Exception Rules (excluding empty and length check)
A	ID	Y	20	The first is not a special character and not a space. The rest may be any non-white space character.	First position: No special characters and no spaces.  All other positions: No spaces	First character must be text or number. Some special characters are not allowed.	Field error if validation fails.
B	Name	Y	60	Any character.			Field error if validation fails.
C	Address 1	Y	40	Any alpha-numeric character including: - . , # Space	All special characters not indicated as allowable.	Some special characters are not allowed.	Field error if validation fails.
D	Address 2	N	40	Any alpha-numeric character including: - . , # Space	All special characters not indicated as allowable.	Some special characters are not allowed.	Field error if validation fails.
E	City	Y	30	The first character is an upper case alphabetic character.	First position: An upper case alphabetic character. No special characters and no spaces.	Proper case must be used. Some special characters are not allowed.	Field error if validation fails
F	State	Y	2	First character is upper case alphabetic (A-Z). Second character is upper case alphabetic (A-Z).	No special characters and no numbers.	Must be a valid state abbreviation. Upper case must be used. Some special characters are not allowed.	Field error if validation fails
G	Zip	Y	10	Numeric characters in the format: 99999 or 99999-9999	No alphabetic characters, no spaces and no special characters with the exception of the - .	Must be formatted as either 99999 or 99999-9999. Special characters are not allowed.	Field error if validation fails
H	NAICS Code	Y	5	Numeric characters only.	No special characters.	Must be a valid Manufacturing NAICS code or may also be NAICS code 54171. Must be formatted as 99999.	Field error if validation fails

Column	Field Name	Required	Max Size	Allowable Characters	Non-Allowable Characters	Field Validation Rules	Exception Rules (excluding empty and length check)
I	Number of Employees	Y	6	Numeric characters only. First Char: 1-9; All others 0-9	No special characters.	Must be between 1 and 9,999. Special characters are not allowed.	1. Field error if equals 0 2. Field error if validation fails
J	Size Comment	If employee size >= 500	> 50 but <= 350	Alphanumeric characters.	No special characters.	If employee size is >= 500 comment is required to explain why the center is serving this client.	Field error if validation fails.
K	Dun and Bradstreet Number	N	9	Numeric characters only.	No special characters.	If submitted, must be formatted as 999999999. Special characters are not allowed.	Field error if validation fails. Field warning if the Dunn & Bradstreet number has been previously reported with a different Client ID.
L	Defense	Y	1	Y or N or y or n	No special characters.	Special characters are not allowed.	Field error if validation fails.
M	Homeland Security	Y	1	Y or N or y or n	No special characters.	Special characters are not allowed.	Field error if validation fails
N	Center Regional Office	If center uses multiple stationery	3	Alphanumeric characters only (a-z A-Z 0-9).	No special characters.	Must be a valid code for your center. Special characters are not allowed.	Field error if validation fails.
O	Center PBA Assigned	N	40	Alphabetic characters only. First character of each name must be upper case. All other characters are lower case. Spaces are allowed.	No special characters with the exception of the space.	Must be formatted as: <Text>space<Text> PBA's name must be registered on the MEP Source for Centers. Special characters are not allowed.	Field error if validation fails.
P	Contact Salutation	Y	4	Mr. or Mrs. or Ms. or Dr.	No special characters with the exception of the period.	Must be one of the following salutations: Mr., Mrs., Ms.,Dr.	Field error if validation fails.

Column	Field Name	Required	Max Size	Allowable Characters	Non-Allowable Characters	Field Validation Rules	Exception Rules (excluding empty and length check)
Q	Contact Last Name	Y	40	Alphabetic characters. The first character of each name must be upper case. All other characters must be lower case. Space, dash and apostrophe are allowed.	No special characters with the exception of the space, dash, and apostrophe.	Title case must be used. The First character must be uppercase followed by all lower case. Must be formatted as: <Text>space<Text>. Allows international characters such as ñ,é,û, etc.  Some special characters are not allowed.	Field error if validation fails.
R	Contact First Name	Y	40	Alphabetic characters. The first character of each name must be upper case. All other characters must be lower case. Space, dash and apostrophe are allowed.	No special characters with the exception of the space, dash, and apostrophe.	Title case must be used. The First character must be uppercase followed by all lower case. Must be formatted as: <Text>space<Text>. Allows international characters such as ñ,é,û, etc.  Some special characters are not allowed.	Field error if validation fails.
S	Contact Position	Y	60	Any character.			Field error if validation fails.
T	Primary Contact Phone	Y	12	Numeric characters. First char 1-9 all others 0-9 with dash (-) between sets	No special characters with the exception of the dash.	First character must be between 1 and 9. Must be formatted as 999-999-9999. Some special characters are not allowed.	Field error if validation fails
U	Primary Contact Phone Extension	N	4	Numeric characters.	No special characters.	Must be formatted as 1234. Special characters are not allowed.	Field error if validation fails
V	Primary Contact Fax	N	12	Numeric characters. First char 1-9 all others 0-9 with dash (-) between sets	No special characters with the exception of the dash.	First character must be between 1 and 9. Must be formatted as 999-999-9999. Some special characters are not allowed.	Field error if validation fails

Column	Field Name	Required	Max Size	Allowable Characters	Non-Allowable Characters	Field Validation Rules	Exception Rules (excluding empty and length check)
W	Primary Contact Email	N	30	Alphanumeric characters formatted as: word.word@word.word.word.ord.word.word.ord	Space	Must contain the character: @. Must be a valid email address.	Field error if validation fails
X	Secondary Contact	N	40	Alphabetic characters. The first character of each name must be upper case. All other characters must be lower case. Space, dash and apostrophe are allowed.	No special characters with the exception of the space, dash, and apostrophe.	Title case must be used. The First character must be uppercase followed by all lower case. Must be formatted as: <Text>space<Text>. Allows international characters such as ñ,é,û, etc.  Some special characters are not allowed.	Field error if validation fails Error: secondary contact is required if secondary phone is provided
Y	Secondary Contact Phone	N	12	Numeric characters. First char 1-9 all others 0-9 with dash (-) between sets	No special characters with the exception of the dash.	First character must be between 1 and 9. Must be formatted as 999-999-9999. Some special characters are not allowed.	Field error if validation fails Error: secondary phone is required if secondary contact is provided.
Z	Secondary Contact Phone Extension	N	4	Numeric characters.	No special characters.	Must be formatted as 1234. Special characters are not allowed.	Field error if validation fails
AA	Secondary Contact Fax	N	12	Numeric characters. First char 1-9 all others 0-9 with dash (-) between sets	No special characters with the exception of the dash.	First character must be between 1 and 9. Must be formatted as 999-999-9999. Some special characters are not allowed.	Field error if validation fails
AB	Secondary Contact Email	N	30	Alphanumeric characters formatted as: word.word@word.word.word.ord.word.word.ord	Space	Must contain the character: @. Must be a valid email address.	Field error if validation fails
AC	Center ID	Y	3	Numeric characters.	No special characters.	Must be formatted as 123. Special characters are not allowed.	Field error if validation fails.

The following procedure will provide step-by-step instructions for submitting the CIF.

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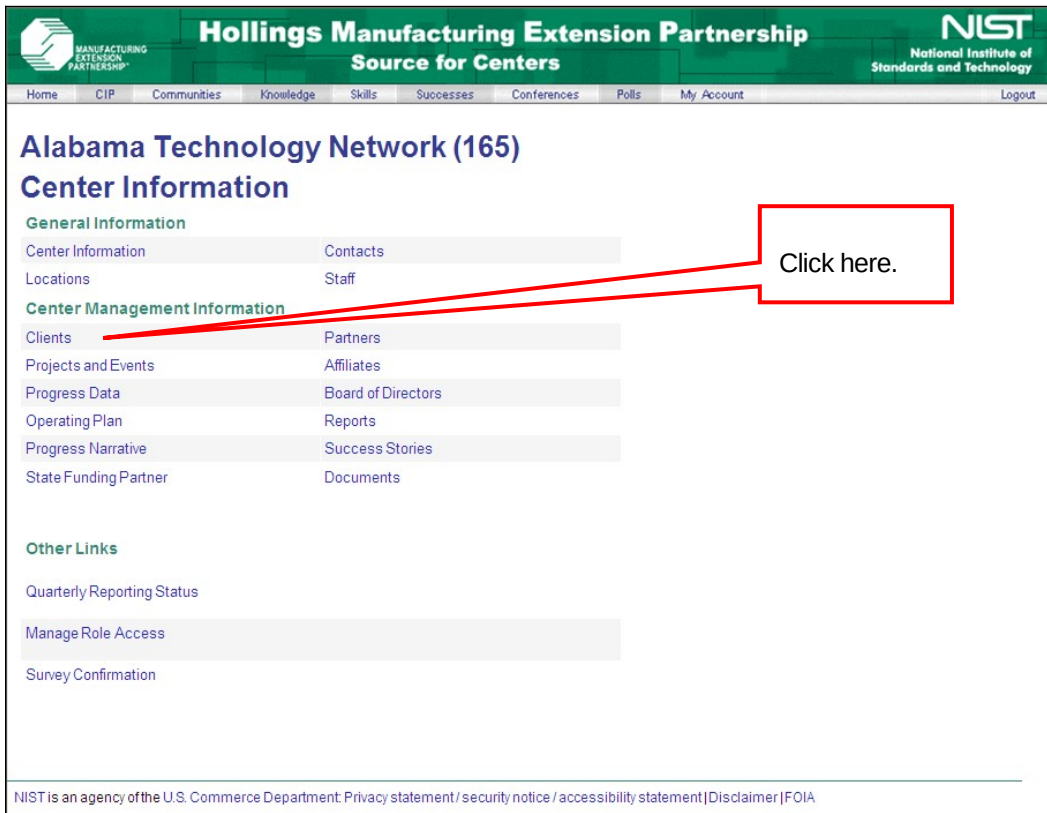
***Procedures for Submitting the Client Information File***

The following procedure provides centers step-by-step instructions for submitting the CIF to NIST MEP.

**(Note:** The Center staff member submitting the CIF data must be assigned the Center Reporting role before they may submit data to NIST MEP. See section 2.4 of this document for instructions on how to assign roles.)

- 35. The center will create their CIF file by exporting information from their information system or database. The CIF must be submitted in XML format.
- Center personnel (assigned the Center Reporting role) will log into the MEP Source for Centers site and navigate to the Center Information Page.
- 36. Center personnel will submit their CIF to the Center Information Page by selecting the **Clients** link as shown in Figure 3.3-2.

Figure 3.3-21: Center Information Page, Clients Link



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37. Select a Quarterly Reporting period from the drop-down list in figure 3.3-3.
38. Click the **Browse** button to locate the file on the user's computer and submit the CIF.
39. Click the **Submit for Validation** button to process your file and check for errors. A validation procedure is run to ensure data is in the correct format.
40. Click the **Submit for Reporting** button when the CIF is ready to be submitted to NIST. The **Submit for Reporting** button saves information and updates the Quarterly Reporting Status to indicate quarterly reporting guidelines have been met.

Figure 3.3-3: Center Information Page, Client Information File utility screen

The screenshot shows the 'Clients Utility' page for the Alabama Technology Network (165). The page features a navigation menu on the left with sections for General Information, Center Management, and Other Links. The main content area includes a search bar, a 'Reports' section with a dropdown menu and a 'Run Report' button, and a 'Quarterly Information File Submission' section. The 'Reporting Period' dropdown is set to '2007-4'. Below this, there is a 'Source Filename (\*.XML)' field with a 'Browse...' button. At the bottom of the submission section, there are two buttons: 'Submit for Validation for 2007 Q4' and 'Submit for Reporting for 2007 Q4', along with a 'Reset' button. Red callout boxes provide instructions: 'Select the year and quarter.' points to the 'Reporting Period' dropdown; 'Click here to locate your CIF.' points to the 'Browse...' button; 'Click here to test the CIF.' points to the 'Submit for Validation for 2007 Q4' button; and 'Click Submit for Reporting to submit final data to NIST MEP.' points to the 'Submit for Reporting for 2007 Q4' button.

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**Note:** Centers may test the submission of the CIF file as many times as they choose by clicking the “Submit for Validation” button, but the person submitting the file must click the “Submit for Reporting” button in order for the submission to be finalized. Clients must be in the NIST MEP database before projects & events can be submitted.

***Procedure for Adding New Clients using Compose New Client link***

An additional method of adding new Clients is by using the Compose New Client link on the Clients utility screen. The following procedure will provide centers step-by-step instructions for submitting New Clients to NIST MEP.

**(Note:** The Center staff member adding new Clients must be assigned the Center Reporting role before they may add Clients information. See section 2.4 of this document for instructions on how to assign roles.)

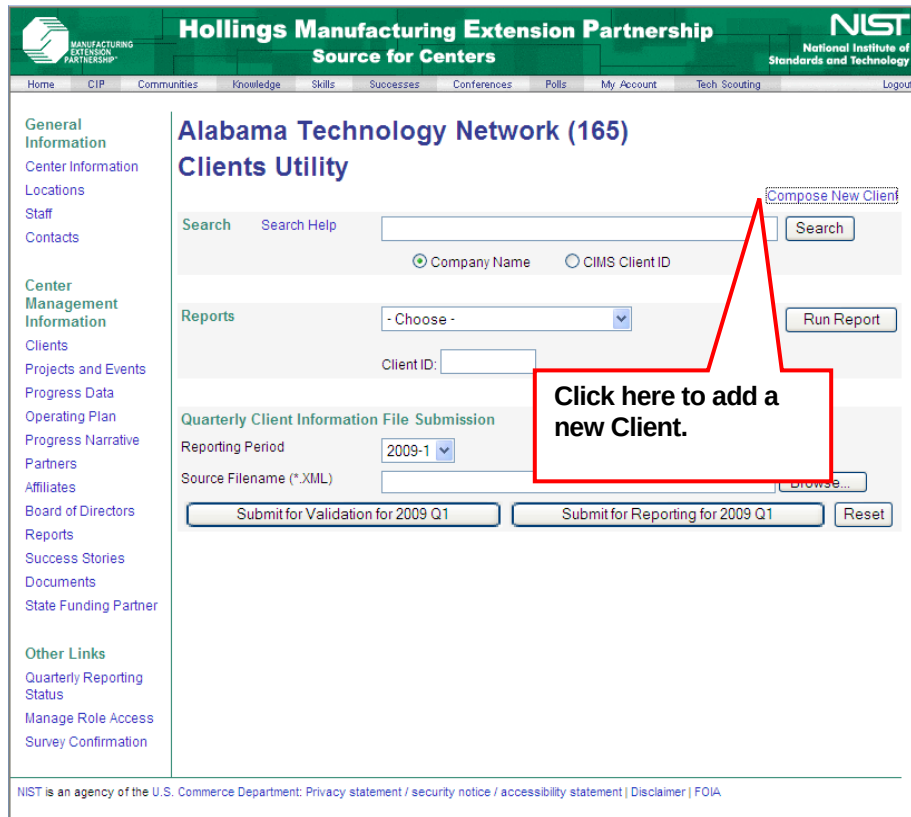
Centers will enter information about Clients into predefined text fields by doing the following:

Navigate to the Center Information Page (refer to the MEP Source for Centers Web Site and Center Information Page for instructions).

From the Center Information Page, click on the link for **Clients**. See figure 3.3-2.

41. Click on **Compose New Client** to create a new Client record as shown in Figure 3.3-4.

Figure 3.3-4: Center Information Page, Clients utility screen





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- 42. Using the description of a Client as a reference, see Table 3.3-4, the designated center personnel will enter information into predefined text fields as shown in Figure 3.3-5.
- 43. Click the **Submit** button to submit your information to NIST MEP.

Figure 3.3-5: Center Information Page, Compose New Client screen

**Hollings Manufacturing Extension Partnership**  
Source for Centers

**NIST**  
National Institute of Standards and Technology

Home CIP Communities Knowledge Skills Successes Conferences Polls My Account Tech Scouting Logout

**General Information**  
Center Information  
Locations  
Staff  
Contacts

**Center Management Information**  
Clients  
Projects and Events  
Progress Data  
Operating Plan  
Progress Narrative  
Partners  
Affiliates  
Board of Directors  
Reports  
Success Stories  
Documents  
State Funding Partner

**Other Links**  
Quarterly Reporting Status  
Manage Role Access  
Survey Confirmation

### Alabama Technology Network (165)

#### Compose New Client

Note: \* denotes that the field is required.

**Client Information**

Client ID: \*

Client Name: \*

Address 1: \*

Address 2:

City: \*

State: \*

ZIP: \*

**Company Information**

NAICS Code: \*

Number of Employees: \*

Client Size Comment:

Dunn and Bradstreet Number:

Defense Related:

Homeland Security Related:

Figure 3.3-5 (cont.): Center Information Page, Compose New Client screen

Defense Related:

Homeland Security Related:

**Center Information**

Stationery Code:   
(if and only if one or more codes assigned to center)

PBA Assigned:

**Primary Contact Information**

Salutation:

First Name:

Last Name:

Title:

Phone:  Ext.:

Fax:

Email:

**Secondary Contact Information**

Name:  (if Secondary Contact Phone provided)

Phone:  Ext.:  (if Secondary Contact Name provided)

Fax:

Email:

**Record History**

Created On/By:

Updated On/By:

**Click here when done.**

**Reset clears all fields.**

**Procedure for Updating Client Information**

Centers are able to update Client information from the Clients Utility on the Center Information Page. The following procedure will provide centers step-by-step instructions for updating Client information on the Center Information Page.

**(Note:** The Center staff member updating Client information must be assigned the Center Reporting role before they may submit data to NIST MEP. See section 2.4 of this document for instructions on how to assign roles.)

Navigate to the Center Information Page (refer to the MEP Source for Centers Web Site and Center Information Page for instructions).

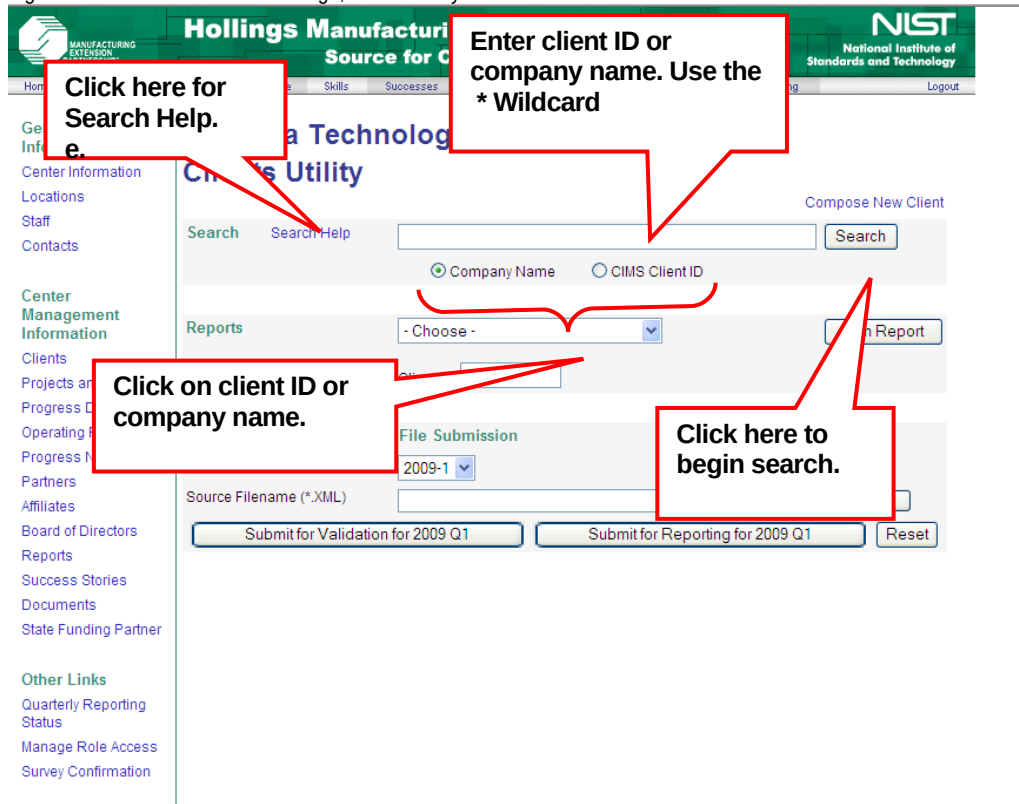
From the Center Information Page, click on the link for **Clients**. See figure 3.3-2.

44. To search for a Client, from the Clients Utility screen, enter a client ID or Company Name in the box next to the **Search** button. An “\*” can be used as a wildcard search (e.g., A\* returns all clients beginning with an “A”. Please do not use complicated searches like AND, OR, XOR...). If you do not use an “\*” as a wildcard your search criteria will be an exact match. For example ACME and ACME Corporation – to find both use ACME\*.

45. Click on the radio button labeled “**Client ID**” or “**Company Name**”. See figure 3.3-6.

46. Next, click the Search button. (Note: Search is very “Simple” not like more advance search engine found on Internet.) Click on the link Search Help for more information about Searches.

Figure 3.3-6: Center Information Page, Clients utility screen



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47. One or more Clients will be listed. Click on **Client Name** you want to update. See figure 3.3-7.

Figure 3.3-7: Center Information Page, Client search results screen.

**Hollings Manufacturing Extension Partnership**  
Source for Centers

NIST  
National Institute of Standards and Technology

Home CIP Communities Knowledge Skills Successes Conferences Polls My Account Logout

**General Information**  
Center Information  
Locations  
Staff  
Contacts

**Center Management Information**  
Clients  
Projects and Events  
Progress Data  
Operating Plan  
Progress Narrative  
Partners  
Affiliates  
Board of Directors  
Reports  
Success Stories  
Documents  
State Funding Partner

**Other Links**  
Quarterly Reporting Status  
Manage Role Access  
Survey Confirmation

### Alabama Technology Network (165) Clients List

[Compose New Client](#)

CIMS ID	Client Name	Client ID
33341	<a href="#">ABC Cutting Contractors</a>	AL739-6882
25629	<a href="#">ABC Fibers</a>	AL-10-01-0040-0
58857	<a href="#">ABC Manufacturing</a>	3341KL
28048	<a href="#">ABC Orthotics &amp; Prosthetics</a>	30941
12172	<a href="#">ABC Rail Products</a>	AL105800330
13911	<a href="#">ABC Rail Products Corp.</a>	AL1056680881
34648	<a href="#">ABC Transportation</a>	AL060001
40611	<a href="#">ABCO Office Furniture</a>	30946

**Click on client's name**

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48. Once Client information is displayed, click on "Edit Client Information". See figure 3.3.8

Figure 3.3-8: Center Information Page, Read Client record.

The screenshot displays a web interface for managing client information. The top navigation bar includes links for Home, CIP, Communities, Knowledge, Skills, Successes, Conferences, Polls, My Account, and Logout. The main content area is titled "Alabama Technology Network (165) View Client Information". On the left, a sidebar menu lists various sections: General Information (Center Information, Locations, Staff, Contacts), Center Management Information (Clients, Projects and Events, Progress Data, Operating Plan, Progress Narrative, Partners, Affiliates, Board of Directors, Reports, Success Stories, Documents, State Funding Partner), and Other Links (Quarterly Reporting Status, Manage Role Access, Survey Confirmation). The main content area is divided into two sections: "Client Information" and "Company Information". The "Client Information" section includes fields for CIMS ID (58857), Client ID (3341KL), Client Name (ABC Manufacturing), Address 1 (123 West End Avenue), Address 2 (Suite 3874), City (Eufala), State (AL), and ZIP (33411). The "Company Information" section includes fields for NAICS Code (32411), Number of Employees (200), Client Size Comment, Dunn and Bradstreet Number, Defense Related (No), Homeland Security Related (No), and Exclude from Survey (No). Two red callout boxes are present: one pointing to the "Client Projects/Events" link with the text "Click here view Projects/Events for this client." and another pointing to the "Edit Client Information" link with the text "Click here to edit Client Information."

Client Information	
CIMS ID:	58857
Client ID:	3341KL
Client Name:	ABC Manufacturing
Address 1:	123 West End Avenue
Address 2:	Suite 3874
City:	Eufala
State:	AL
ZIP:	33411

Company Information	
NAICS Code:	32411
Number of Employees:	200
Client Size Comment:	
Dunn and Bradstreet Number:	
Defense Related:	No
Homeland Security Related:	No
Exclude from Survey:	No



  

Center Information	
Stationery Code:	
PBA Assigned:	

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- 49. Figure 3.3.9 shows the Client record opened in edit mode. Review the Client's data. If needed, update any data where necessary. Click the **Submit** button when you are done making your changes. Your updates will be sent to NIST MEP.

Figure 3.3-9: Center Information Page, Update Client screen

 <b>Hollings Manufacturing Extension Partnership</b> Source for Centers		 National Institute of Standards and Technology
Home CIP Communities Knowledge Skills Successes Conferences Polls My Account Logout		
<b>General Information</b> Center Information Locations Staff Contacts  <b>Center Management Information</b> Clients Projects and Events Progress Data Operating Plan Progress Narrative Partners Affiliates Board of Directors Reports Success Stories Documents State Funding Partner  <b>Other Links</b> Quarterly Reporting Status Manage Role Access Survey Confirmation	<h2>Alabama Technology Network (165)</h2> <h3>Edit Client Information</h3> <p><b>Note:</b> * denotes that the field is required.</p> <p><b>Client Information</b></p> CIMS ID: 58857 Client ID: * 3341KL Client Name: * ABC Manufacturing Address 1: * 123 West End Avenue Address 2: Suite 3874 City: * Eufala State: * Alabama ZIP: * 33411  <p><b>Company Information</b></p> NAICS Code: * 32411 Number of Employees: * 200  Client Size Comment: no comments necessary - client has < 500 employees.	
	Dunn and Bradstreet Number: <input type="text"/> Defense Related: <input type="checkbox"/> Homeland Security Related: <input type="checkbox"/>  <p><b>Center Information</b></p> Stationery Code: <input type="text"/> <small>* if and only if one or more codes assigned to center)</small> PBA Assigned: <input type="text"/>  <p><b>Primary Contact Information</b></p> Salutation: * Mr. First Name: * John Last Name: * Smith Title: * President Phone: * 344-239-3484 Ext.: <input type="text"/> Fax: <input type="text"/> Email: <input type="text"/>	



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Figure 3.3-9 (cont.): Center Information Page, Update Client screen

The screenshot shows a web form titled "Secondary Contact Information". The form contains the following fields and controls:

- Name:** Text input field containing "Michael Johnson". Below it is a radio button labeled "if Secondary Contact Name provided" which is selected.
- Phone:** Text input field containing "344-238-4855" and an "Ext.:" label with an empty text input field. Below it is a radio button labeled "if Secondary Contact Phone provided" which is selected.
- Fax:** Empty text input field.
- Email:** Empty text input field.
- Buttons:** "Submit" and "Reset" buttons.

Two red callout boxes provide instructions:

- A box on the left points to the "Submit" button with the text: "Click Submit to save changes."
- A box on the right points to the "Reset" button with the text: "Reset clears all fields. If you mistakenly hit reset, DO NOT SAVE PAGE."

At the bottom of the form, there is a footer: "NIST is an agency of the U.S. Commerce Department: Privacy statement / security notice / accessibility statement".



**3.3.6 Field Descriptions for the Client Information File**

Table 3.3-5: Field Descriptions for the Client Information File

Field Name/ Frequency	Instruction(s)	Example(s)
ID	Provide code that uniquely identifies the client. Identifiers must be unique and permanently associated with CME name and may be any combination of letters and/or numbers. It cannot contain client's actual name. This field is required and cannot be left blank.	74-1239876-2 or 3487783
Name	Provide CME name (single plant or facility) where center services were rendered. Use title case (first letter of each word is a capital letter and all the rest are lower case). This field is required and cannot be left blank.	Becton Dickinson Labware instead of BECTON DICKINSON LABWARE
Address 1	Provide street address on which CME is located. Enter this information exactly as it should appear on the address label and on the pre-survey letter. Do not capitalize all letters – use title case (first letter of each word is a capital letter and all the rest are lower case). This field is required and cannot be left blank.	1 Becton Dr instead of 1 BECTON DR.
Address 2	Provide any additional address information. This field is not required.	5 <sup>th</sup> Floor Room B2345 instead of 5 <sup>TH</sup> FLOOR, ROOM B2345
City	Provide city in which CME is located. Enter this information exactly as it should appear on the address label and on the pre-survey letter. Do not capitalize all letters – use title case (first letter of each word is a capital letter and all the rest are lower case). Do not use commas, periods, or other punctuation in this field. This field is required and cannot be left blank.	East Lansing instead of E. LANSING
State	Provide state in which CME is located. Select State from drop down list. This field is required and cannot be left blank.	Pennsylvania
Zip	Provide zip code of CME. Enter this information exactly as it should appear on the address label and on the pre-survey letter. Additionally, if using a nine-digit zip code, a hyphen is required. This field is required and cannot be left blank.	21701 or 02348 or 60669-3429
NAICS Code	Provide primary 5-digit Manufacturing NAICS code of the client identified by the CME's name. This field is required and cannot be left blank. Also acceptable is code 54171.	33111
Number Of Employees	Provide number of employees at the CME. For CMEs with more than one location, enter only the number of employees at the CME site that was served. Enter whole numbers between 1-999,999. This field is required and cannot be left blank.	14 or 234
Size Comment	Provide justification for why clients with >= 500 employees are being served.	Working with client in support of John Deere system account.
Dun and Bradstreet Number	Provide the client establishments Dun & Bradstreet number. This field is not required.	123456789 or None
Defense	Report Y if the client sells to the US Defense Industry, regardless of percentage of sales or the number of tiers away; Otherwise report N. This field is required and cannot be left blank.	Y or N or y or n
Homeland Security	Report Y if the client sells to the US Homeland Security Industry, regardless of percentage of sales or the number of tiers away; Otherwise report N. This field is required and cannot be left blank.	Y or N or y or n
Stationery Code	Provide unique stationery code. This field is required for those centers that have identified stationery codes.	XL1 is assigned to a partner of Alabama Technology Network.
Center PBA Assigned	Provide the name of the PBA assigned to the client if the client is a 360vu client. PBA's name must be registered on the Source for Centers. This field is not required.	John Smith
Contact Salutation	Provide client contact person's prefix title. This field is required and cannot be left blank.	Dr. or Mr. or Mrs. or Ms., etc.
Contact Last Name	Provide last name of client contact. Do not capitalize all letters in this field – use title case (first letter is a capital letter and all the rest are lower case). Do not include first names. This field is required and cannot be left blank.	Smith instead of WILLIAM SMITH
Contact First Name	Provide first name of contact. Do not capitalize all letters in this field – use title case (first letter is a capital letter and all the rest are lower case). Do not include middle names or middle initials. This field is required and cannot be left blank.	William instead of WILLIAM DENNIS
Contact Position	Provide job title of contact person. Do not capitalize all letters in this field – use title case (first letter of each word is a capital letter and all the rest are lower case). This field is required and cannot be left	Chief Executive Officer instead of CHIEF EXECUTIVE

<b>Field Name/ Frequency</b>	<b>Instruction(s)</b>	<b>Example(s)</b>
	blank.	OFFICER
Primary Contact Phone	Provide telephone number of primary contact person. Include area code and complete phone number. Use the format 111-111-1111. This field is required and cannot be left blank. DO NOT USE TOLL-FREE NUMBERS.	301-975-0000
Primary Contact Phone Extension	Provide extension. Use the format 1234. This field is not required.	2300
Primary Contact Fax	Provide Fax number of primary contact person. Include area code and complete phone number. Use the format 111-111-1111. This field is not required. DO NOT USE TOLL-FREE NUMBERS.	301-975-0000
Primary Contact Email	Provide email address of primary contact person. This field is not required.	abc@defg.com
Secondary Contact	Provide secondary contact name. Do not use capital letters in this field. This field is not required.	John Doe
Secondary Contact Phone	Provide telephone number of secondary contact person. Include area code and complete phone number. Use the format 111-111-1111. This field is not required. DO NOT USE TOLL-FREE NUMBERS.	301-975-0000
Secondary Contact Phone Extension	Provide extension. Use the format 1234. This field is not required.	2300
Secondary Contact Fax	Provide Fax number of secondary contact person. Include area code and complete phone number. Use the format 111-111-1111. This field is not required. DO NOT USE TOLL-FREE NUMBERS.	301-975-0000
Secondary Contact Email	Provide email address of secondary contact person. This field is not required.	abc@defg.com
Center ID	Provide CIMS Center ID. This field is required.	123

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## Project Information File

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The purpose of the Project Information File (PIF) is to capture substantive work that will be surveyed. Report only substantive interactions on the PIF. The PIF will contain one record for each substantive project or event completed during the period. In order to be a submittable project or event, according to the NIST definition, the interaction must be substantive which means it must be designed to facilitate measurable changes in a U.S. based manufacturing firm's operations that affects the firm's performance and has measurable impact. Refer to the Key Concepts Section of this document for more information on substantive interactions.

PIF records are used for two purposes:

50. To provide descriptive information to NIST MEP regarding the types of Projects and Events in which the center engaged clients during the quarter. NIST MEP staff and review panels use this information in monitoring center projects/events.
51. To allow the survey process to function. The PIF provides background information about the types of projects conducted with the client.

The PIF is the first step in the survey process and provides NIST with valuable data about center interactions. The survey house will use the project and event information to interview client-manufacturing establishments (CMEs) regarding the impacts of center assistance. The PIF contains important background information for the interviewers to acquire the best possible information during each client survey. Submitting accurate, complete PIF records is tremendously important for centers to ensure that complete and comprehensive data on the impact of services provided is captured by the survey. The survey process is discussed in Section 4.0.

### Requirements for the Project/Event Information File

The PIF will contain one record for each substantive project/event completed during the period (please see Key Concepts for more information about how to classify project/events). Centers will not report Projects and Events that were completed after the end of the period, but may report projects completed before the beginning of the period. Projects are reported as a single Client ID and Events have multiple Client IDs per record. Requirements for the PIF, the validation process, and submittal process follow. Clients must be in the system before submitting projects.

The PIF must be submitted as an Extensible Markup Language (XML) file.

XML is an open standard for describing data. It is an ideal solution for transferring structured data from server-to-client, server-to-server or application-to-application on any platform. It was designed to improve the functionality of the Web by providing more flexible and adaptable information identification.

It is called extensible because it is not a fixed format like HTML (a single, predefined markup language). Instead, XML is actually a meta-language -- a language for describing other languages, which allows users to customize the markup language for different types of documents.

Unlike HTML, where both the tag semantics and the tag set are fixed [example an <h1> is always a first level heading], XML specifies neither semantics nor a tag set. XML provides a facility to define tags and the structural relationships between them. Since there's no predefined tag set, there can't be any preconceived semantics. All of the semantics of an XML document will either be defined by the applications that process them or by style sheets.

NIST MEP selected XML because it allows for more flexibility in communicating with information systems used by MEP and Centers – both currently and in the future. XML will also help MEP to collect better quality and more accurate data.

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XML is very simple, but the authoring of XML content can be difficult due to formatting requirements. Although any text editor can be used to create XML documents, there are a variety of specialized text editors (see lists below) that help with formatting.

To facilitate the authoring of XML files required for client and project/event submissions, MEP has created an Excel spreadsheet template that contains a macro, which will allow for quick creation of XML files. This tool is intended to help centers that do not have information systems capable of generating the required XML files. Requirements for using the utilities are:

- Designed to work with Windows 2000 or later
- Designed to work with Microsoft Office 2000 or later
- Excel macros must be enabled

Instructions for using the templates are included in the Excel file on the Help worksheet.

These Excel templates can be downloaded from the Source for Centers website, or you may use commercially available software to generate XML. However, if you choose to use a commercially available utility, please be aware the file format must be the same as that found in Figure 3.4.1 Sample Projects XML file. Centers are responsible to ensure the quality and correct structure of the XML content no matter how the XML is generated.

MEP can provide the Data Type Definition (DTD) and/or XML schema definitions for the project/event submission upon request. However, these should not be used for full validation of XML submissions. Refer to Section 3.4.2 for more information on PIF Validation Process.

Table 3.4-1 : XML Editors

**Note:** NIST MEP does not endorse any of these products. This list is provided to help centers to locate a tool if they choose not to use the Excel template provided by MEP. Microsoft Word and Microsoft Excel [XP versions or later] should **NOT** be used to generate XML because they generate proprietary versions of XML.

Name	Available Free of Charge	Website
XMLSPY 2004	No	<a href="http://www.altova.com/">http://www.altova.com/</a>
XMLmind	No	<a href="http://www.xmlmind.com">http://www.xmlmind.com</a>
Sonic Stylus Studio	No	<a href="http://www.sonicsoftware.com">http://www.sonicsoftware.com</a>
Cooktop	Yes	<a href="http://www.xmlcooktop.com/">http://www.xmlcooktop.com/</a>
Aioob - XML Editor	Yes	<a href="http://www.aioob.com/xmlpage/AioobXMLed.htm">http://www.aioob.com/xmlpage/AioobXMLed.htm</a>
Xray2 XML Editor	Yes	<a href="http://architag.com/xray/">http://architag.com/xray/</a>
Omnimark	No	<a href="http://www.omnimark.com">http://www.omnimark.com</a>

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Figure 3.4-22: Sample ProjectsEvents.xml file

```

<?xml version="1.0" encoding="UTF-8"?>
<PROJECT_EVENT_SUBMISSION>
<DATE_PREPARED>2008-9-24</DATE_PREPARED>
<TIME_PREPARED>13:38:52</TIME_PREPARED>
  <PROJECT_EVENT>
    <ID>123</ID>
    <CLIENT_IDS> <CLIENT_ID>12345</CLIENT_ID> </CLIENT_IDS>
    <TITLE>Eureka winning ways</TITLE>
    <START_DATE>2007-7-9</START_DATE>
    <END_DATE>2007-8-29</END_DATE>
    <DELIVERY_MODE>P</DELIVERY_MODE>
    <SUBSTANCE>11</SUBSTANCE>
    <TYPE>E</TYPE>
    <CENTER_CONTACT>Dick Grey</CENTER_CONTACT>
    <CENTER_HOURS>62</CENTER_HOURS>
    <AFFILIATE_ORGANIZATION></AFFILIATE_ORGANIZATION>
    <AFFILIATE_CONTACT></AFFILIATE_CONTACT>
    <AFFILIATE_HOURS></AFFILIATE_HOURS>
    <NATIONAL_ACCOUNT>Eww01</NATIONAL_ACCOUNT>
    <TOTAL_BILLED>5500</TOTAL_BILLED>
    <FUNDING_SOURCE>MEP</FUNDING_SOURCE>
    <EIS_YEARS>3</EIS_YEARS>
  </PROJECT_EVENT>
  <PROJECT_EVENT>
    <ID>456</ID>
    <CLIENT_IDS> <CLIENT_ID>22222</CLIENT_ID> </CLIENT_IDS>
    <TITLE>MilTech Assistance</TITLE>
    <START_DATE>2006-11-29</START_DATE>
    <END_DATE>2007-9-19</END_DATE>
    <DELIVERY_MODE>P</DELIVERY_MODE>
    <SUBSTANCE>13</SUBSTANCE>
    <TYPE>T</TYPE>
    <CENTER_CONTACT>Linda Larson</CENTER_CONTACT>
    <CENTER_HOURS>4</CENTER_HOURS>
    <AFFILIATE_ORGANIZATION></AFFILIATE_ORGANIZATION>
    <AFFILIATE_CONTACT></AFFILIATE_CONTACT>
    <AFFILIATE_HOURS></AFFILIATE_HOURS>
    <NATIONAL_ACCOUNT></NATIONAL_ACCOUNT>
    <TOTAL_BILLED>5923</TOTAL_BILLED>
    <FUNDING_SOURCE>MIL</FUNDING_SOURCE>
    <EIS_YEARS>7</EIS_YEARS>
  </PROJECT_EVENT>
  <PROJECT_EVENT>
    <ID>789</ID>
    <CLIENT_IDS> <CLIENT_ID>99999</CLIENT_ID> </CLIENT_IDS>
    <TITLE>Eureka winning ways</TITLE>
    <START_DATE>2007-4-9</START_DATE>
    <END_DATE>2007-7-3</END_DATE>
    <DELIVERY_MODE>P</DELIVERY_MODE>
    <SUBSTANCE>11</SUBSTANCE>
    <TYPE>T</TYPE>
    <CENTER_CONTACT>Guy Black</CENTER_CONTACT>
    <CENTER_HOURS>80</CENTER_HOURS>
    <AFFILIATE_ORGANIZATION></AFFILIATE_ORGANIZATION>
    <AFFILIATE_CONTACT></AFFILIATE_CONTACT>
    <AFFILIATE_HOURS></AFFILIATE_HOURS>
    <NATIONAL_ACCOUNT>Eww01</NATIONAL_ACCOUNT>
    <TOTAL_BILLED>5500</TOTAL_BILLED>
    <FUNDING_SOURCE>MEP</FUNDING_SOURCE>
    <EIS_YEARS>5</EIS_YEARS>
  </PROJECT_EVENT>
  <PROJECT_EVENT>
    <ID>101</ID>
    <CLIENT_IDS> <CLIENT_ID>89076</CLIENT_ID> </CLIENT_IDS>
    <TITLE>Environmental Compliance and Best Practice Assessment</TITLE>
    <START_DATE>2007-3-16</START_DATE>
    <END_DATE>2007-8-31</END_DATE>
    <DELIVERY_MODE>P</DELIVERY_MODE>
    <SUBSTANCE>12</SUBSTANCE>
    <TYPE>A</TYPE>
    <CENTER_CONTACT>Lori white</CENTER_CONTACT>
    <CENTER_HOURS>5</CENTER_HOURS>
    <AFFILIATE_ORGANIZATION>Peter Rabbit</AFFILIATE_ORGANIZATION>
    <AFFILIATE_CONTACT>Rabbit Rollers</AFFILIATE_CONTACT>
    <AFFILIATE_HOURS>25</AFFILIATE_HOURS>
    <NATIONAL_ACCOUNT></NATIONAL_ACCOUNT>
    <TOTAL_BILLED>1232</TOTAL_BILLED>
    <FUNDING_SOURCE>EPA</FUNDING_SOURCE>
    <EIS_YEARS>1</EIS_YEARS>
  </PROJECT_EVENT>
</PROJECT_EVENT_SUBMISSION>

```

*Assigning Unique Project/Event Identifiers*

Each individual project/event reported on the PIF must be assigned a unique project/event identifier. This unique id will identify each interaction. The project/event id is not the same as a service identifier, used by the center to uniquely identify services. An example is given in Table 3.4-1.

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Table 3.4-8: Example Project/Event Unique Identifiers

Project/Event Title	ClientID	ProjectEvent ID	Project Start Date	Project End Date	Substance
CN302 Change Management	AL-05-30	AWAW	1/5/2009		
LE203 5S System	AL-03-53	BAR	1/3/2009	5/30/2009	13
LE205 Cellular Manufacturing	AL-03-53	AQAW	2/5/2009	2/22/2009	13
SM205 Strategic and LR Planning	AL-07-98	1234	3/7/2009	3/22/2009	11
Lean Training	AL-123-35, AL-345-34, AL-678-90	BBCDE	2/5/2009		
Computer Training	ABCDEF345 6	BEDYUKJJ23	3/15/2009	3/30/2009	11

Each Project/Event is assigned a unique Project/Event identifier.

Events may contain multiple client ids, but only one project id.

**Reporting Hours and Total Billed for Events**

Centers should be careful when reporting the number of hours and total billed for events. The total number of hours for the event should be reported without multiplying the number of hours by the number of clients or attendees. The total billed should be reported as the total amount of fees collected for the event.

If different clients are billed different amounts another approach is to report the interactions separately as projects so that each billed amount can be reported separately without over inflating the total billed. The same is true for hours. If clients attended the event, but different amounts of time were spent with each client, the interaction can be reported as a project so that the differences in hours spent can be reported.

All projects and events reported to NIST MEP will be surveyed.

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### Short-term and Long-term Impact Projects (Expected Impact Span Years – EIS Years)

- Centers will designate projects/events as having the potential for Short-Term or Long-Term impact, projects that will realize or continue to realize impacts beyond the first survey. Centers will designate how many times a project/event will be surveyed.
  - EIS Short Term – Immediate Impacts
    - <EIS\_YEARS>1</EIS\_YEARS>
  - EIS Long Term – Projects that may involve projects with impacts that may take time to occur >=3
    - <EIS\_YEARS>3</EIS\_YEARS>
- Short-term impact
  - Centers will only have the opportunity to change the EIS\_YEARS during Survey Confirmation
  - Centers can change a project's designation for EIS\_YEARS as long as the project has not been surveyed (If you change EIS\_YEARS from 1 to something greater than or equal to 3, that project is considered to have long-term impact.
  - Short-term – projects are limited to a single survey. These surveys will occur six months after the completion of the project. For example, if a project was submitted in Q1, it would be surveyed in Q3.
  - Since we also have a rule that a client can only be surveyed once a year, some short-term projects/events may not be surveyed until over a year after the completion date of the project.
  - Clients cannot be surveyed more than once a year.
- Long-term impact
  - Centers will only have the opportunity to change the EIS\_YEARS during Survey Confirmation
  - Centers can change a project's designation for EIS\_YEARS as long as the project has not been surveyed (If you change EIS\_YEARS from greater than or equal to 3 to 1, that project is considered to have short-term impact.
  - Centers can change a project's designation for EIS\_YEARS as long as the project/event has not been surveyed more than the value of EIS\_YEARS. For example if a project has an EIS\_YEARS value of 4 and has been surveyed 2 times, the EIS\_YEARS value can be changed to 5.
  - Centers can increase the EIS\_YEARS value from 3 to any number they choose that is greater than 3 if they expect a project to generate impact even longer term.
  - Long term impact projects are also initially surveyed six months after the completion of the project, .provided the client has not been surveyed in the prior 12 months.

### PIF Validation Process

NIST MEP will use a validation tool to secure validity and consistency of PIF records stored in the NIST MEP database. The Center Information Page and PIF act as the only way through which centers can submit their quarterly PIF to NIST MEP. Table 3.4-2 describes the kinds of exceptions centers can expect to receive during the validation process. Table 3.4-3 below describes the possible outcomes after an individual or batch submission is performed. Clients must be in the system before submitting projects.

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Table 3.4-2: PIF Exception Types

Exception	Description
Warning	A possible problem with the data that must be verified but can be accepted by the center as accurate.
Error	A problem with the data that results in the PIF being non-submittable until the error is corrected by the center.

Table 3.4-3: Possible PIF Validation Outcomes

Description	Outcome
One or more errors are detected	Validation is considered as failed. The user receives a printable page with the detailed information regarding validation results and a notice about the failed status of the submission.
One or more errors and one or more warnings are detected	Validation is considered as failed. The user receives a printable page with the detailed information regarding validation results (both, errors and warnings) and a notice about the failed status of the submission.
One or more warnings are detected	Validation is considered as tentatively passed. The user receives a printable page with the detailed information regarding warnings. At this point an option to force submission of client data by suppressing warnings is available.
No errors or warnings are detected	Client submission is accepted. Acknowledging page is displayed.

For submission purposes project/event records are identified by the center assigned project/event ID that must be **unique among** projects/events for the same client. In practical terms this results in the approach where project/events records for submission purposes are uniquely identified by the **combination** of both, center assigned client ID and center assigned project/event ID.

An attempt to submit a project/event with the center assigned project/event ID that is not unique within the client specified (there is at least one more previously submitted project/event with the same center assigned project/event ID for the same client) results in validation failure (regardless of whether it is an individual or batch submission). No further validation of such record (or batch of records) is performed.



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Upon successful submission of center project/event data, unique numeric CIMS ID (automatically generated by the system) is assigned to project/events records. These IDs can be easily retrieved by browsing client and project/event records on the CIP site or looked up by generating Center Clients and Project/Event Report (available on the CIP site on the Client page). Although it is possible to continue to refer to projects/event s by their center assigned IDs, it is very important that future communications between MEP and Centers regarding projects/event s rely only on CIMS generated IDs. This ensures the integrity of data and expedites troubleshooting of problems with data.

Validation of project/event records (during either individual or batch submission) is performed on a record field level or database level. Field level validation ensures that the data entered in all record fields are correct. However, this type of validation does not validate the data against the client and project/event data already stored in CIMS databases for the given Center. The latter is achieved through the database validation level. The source of exception conditions does not have any impact on validation results. However, understanding of sources of errors and warnings may help troubleshoot submission problems.

Specific business and system validation rules pertinent to project/event records are described in the table below. In addition to validation rules spelled out in the table, field level validation error is reported each time and for each field if:

- Field value submitted is null, but the field is marked as required in the table below
- The length of the value submitted exceeds the number specified in the Max Size column in the table below.

Some special characters are not allowed in fields. Special characters are defined as spaces and the following characters:

~ ! @ # \$ % ^ & \* ( ) - \_ = + \ | [ ] { } : ; ' " < > , . / ?

Table 3.4-4: PIF Validation Criteria

Column	Field Name	Required	Max Size	Allowable Characters	Non-Allowable Characters	Field Validation Rules	Exception Rules (excluding empty and length check)
A	#	Y	N/A	No special characters.	Automatically generated.	Field error if validation fails.	1. Record error if combination of A and B are not unique. 2. Field error if validation fails.
B	ID	Y	20	The first is not a special character and not a space. The rest may be any non-white space character.	First position: No special characters and no spaces.  All other positions: No spaces	Any sequence of alphanumeric characters. Some special characters are not allowed.	
C	Client ID	Y	400	The first is not a special character and not a space. The rest may be any non-white space character. A comma with no spaces separates client ids for events.	First position: No special characters and no spaces.  All other positions: No spaces. Commas are allowed for multiple ids.	Any sequence of alphanumeric characters. Some special characters are not allowed.	1. Record error if Client ID has not been submitted to NIST. 2. Field error if validation fails.
D	Title	Y	80	Any character.			Field error if validation fails.
E	Start Date	Y	10	0-9 in format YYYY-MM-DD	Some special characters are not allowed.	Must be a valid date. Some special characters are not allowed.	Field error if validation fails.
F	End Date	Y	10	0-9 in format YYYY-MM-DD	Some special characters are not allowed.	1. Must be a valid date. Special characters are not allowed. 2. The date must be on or after the Start Date. 3. The date must be on or before the end of the current reporting period.	1. Field error if validation rule 1 fails. 2. Record error if validation rule 2 fails. 3. Field error if validation rule 3 fails.
G	Delivery Mode	Y	1	Upper case P or Uppercase E	Some special characters are not allowed.	1. Must be one of the following: E or P. Special characters are not allowed. Lower case letters not allowed. 2. If P is submitted, there cannot be more than one client id.	1. Field error if validation fails.
H	Substance	Y	2	11 or 12 or 13 or 14 or 15 or 16	Special characters are not allowed.	Must be one from the set of [11-16]. Alphabetic and special characters are not allowed.	Field error if validation fails.

Column	Field Name	Required	Max Size	Allowable Characters	Non-Allowable Characters	Field Validation Rules	Exception Rules (excluding empty and length check)
I	Type	Y	1	Uppercase A or T or E	Special characters are not allowed.	Must be one of the following: A, T, or E. Special characters not allowed. Lower case letters not allowed.	Field error if validation fails.
J	Center Contact	Y	60	Alphabetic characters. The first character of each name must be upper case. All other characters must be lower case. Space, dash and apostrophe are allowed.	No special characters with the exception of the space, dash, and apostrophe.	Title case must be used. The First character must be uppercase followed by all lower case. Must be formatted as: <Text>space<Text>. Allows international characters such as ñ,é,û, etc.  Some special characters are not allowed.	Field error if validation fails.
K	Center Hours	Y	4	Numeric characters. First char 1-9 all others 0-9.	No special characters.	Must be a number between 1 and 9999. Special characters are not allowed. Alphabetic characters are not allowed.	1. Field error if validation fails. 2. Field error if string is 0 (zero). 3. Field error if string begins with zero.
L	Affiliate Organization	N	60	Alphabetic characters. The first character of each name must be upper case. All other characters must be lower case. Space, dash and apostrophe are allowed.	No special characters with the exception of the space, dash, and apostrophe.	Should not be empty if L or M is not empty. Some special characters are not allowed.	Record error if validation fails.
M	Affiliate Contact	N	60	Alphabetic characters. The first character of each name must be upper case. All other characters must be lower case. Space, dash and apostrophe are allowed.	No special characters with the exception of the space, dash, and apostrophe.	1. Should not be empty if K or M is not empty. 2. If not empty, should be formatted as: <Text>space<Text>	1. Record error if validation rule 1 fails. 2. Field error if validation rule 2 fails.
N	Affiliate Hours	N	4	First Char: 1-9; All others 0-9	No special characters	1. Should not be empty if K or L is not empty. 2. Must be a number between 1 and 9999. Some special characters are not allowed. Alphabetic characters are not allowed.	1. Field error if validation fails. 2. Field error if string is 0 (zero). 3. Field error if string begins with zero.

Column	Field Name	Required	Max Size	Allowable Characters	Non-Allowable Characters	Field Validation Rules	Exception Rules (excluding empty and length check)
O	System Accounts  <b>NOTE:</b> Label in Excel template and xml tag reflect the original field name of National Accounts to limit changes necessary to center information systems.	N	6	Alphanumeric characters. Valid national accounts are: DE01, MEDT01, NG01, LB01, OS01, UFP01, BAX01, PAC01, HS01, BOE01, UTC01, DF01, EMD01, EWW01, PP01, SEI01, SIM01, RC101	No special characters.	Any sequence of alphabetic and numeric characters. Some special characters are not allowed. May contain one of the following: 1. DE01 – John Deere Value Stream Mapping 2. BOE01 - Boeing 3. MEDT01 – MedSource Technologies Inc. 4. UTC01 – United Technologies Corp. 5. NG01 – Northrop Grumman Supply Chain 6. LB01- Lasco Bathware 7. OS01 – O’Neal Steel 8. UFP01 – Universal Forest Products 9. BAX01- Baxter 10. PAC01 – Pactiv 11. HS01 – Heidtman Steel 12. DF01 – Dawn Foods 13. EMD01 – Electro Motive Diesel 14. EWW01 - Eureka! Winning Ways 15. PP01 - Pretium Packaging 16. SEI01 – Suez Energy International 17. SIM01 – Simplot 18. RC01 – Red Cross	Field error if validation fails.
P	Total Billed	Y	6	Numeric characters between 0 and 999999.	No special characters	Must be a number between 0 and 999999. Special characters are not allowed.	Field error if validation fails.

Column	Field Name	Required	Max Size	Allowable Characters	Non-Allowable Characters	Field Validation Rules	Exception Rules (excluding empty and length check)
Q	Federal Partnerships/Formerly Funding Source  <b>NOTE:</b> Label in Excel template and xml tag reflect the original field name of Funding Source to limit changes necessary to center information systems.	Y	4	Upper case MEP, EDA1, EDA2, DOL1, DOL2, NIH, DOC, DOE, MIL or EPA	No special characters	Must be one of the following: MEP, EDA1, EDA2, DOL1, DOL2, NIH, DOC, DOE, MIL or EPA. Special characters not allowed. Lower case letters not allowed.	Field error if validation fails.
R	EIS_Years	Y	3	1 – 99 NOTE: 2 is not allowed	No special characters	Must be a number 1-99 NOTE: 2 is not allowed	Field error if validation fails

The following procedure will provide step-by-step instructions for submitting the PIF.

### Procedures for Submitting the Project Information File

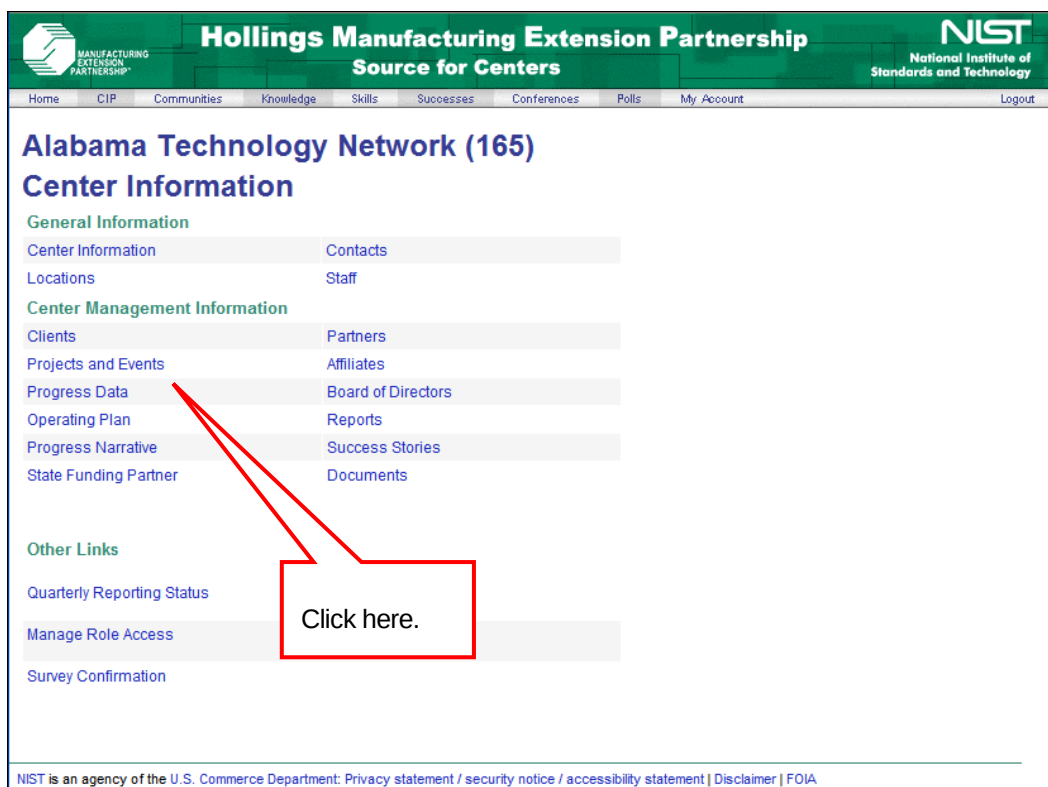
The following procedure will provide centers step-by-step instructions for submitting the PIF NIST MEP.

The center will create their PIF by exporting information from their information system or database. The PIF must be in .xml format.

Center personnel will log into the MEP Source for Centers site and navigate to the Center Information Page. The Center staff member submitting the PIF must be assigned the Center Reporting role before they may submit data to NIST MEP. See section 2.4 of this document for instructions on how to assign roles.

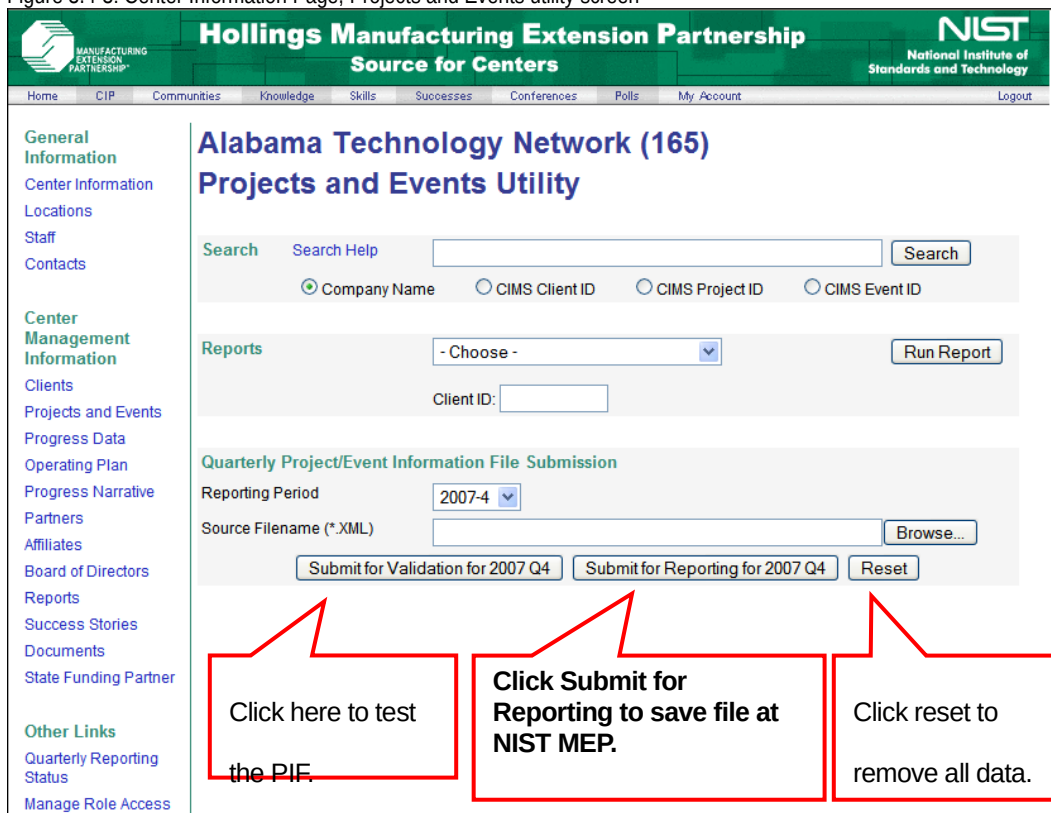
Center personnel will submit their PIF to the Center Information Page by selecting the Projects and Events link as shown in Figure 3.4-2.

Figure 3.4-2: Center Information Page, Projects and Events Link



52. Select Quarterly Reporting Period, and then click the Browse button to locate the file on the user's computer and submit the PIF.
53. Click the Submit for Validation button to process your file and check for errors. The Submit for Validation button allows for further editing. A validation procedure is run to ensure data is in the correct format.
54. Click the Submit for Reporting button when the report is finalized (no additional editing is allowed). The Submit for Reporting button saves information and updates the quarterly reporting status to indicate quarterly reporting guidelines have been met. **Note:** Centers may test the submission of the PIF as many times as they choose by clicking the "Submit and Test" button, but the person submitting the file must click the "Submit for Reporting" button in order for the file to be saved at NIST MEP.

Figure 3.4-3: Center Information Page, Projects and Events utility screen



### Procedure for Viewing Projects and Events

The Project/Event utility has an additional functionality that allows for viewing projects and events.

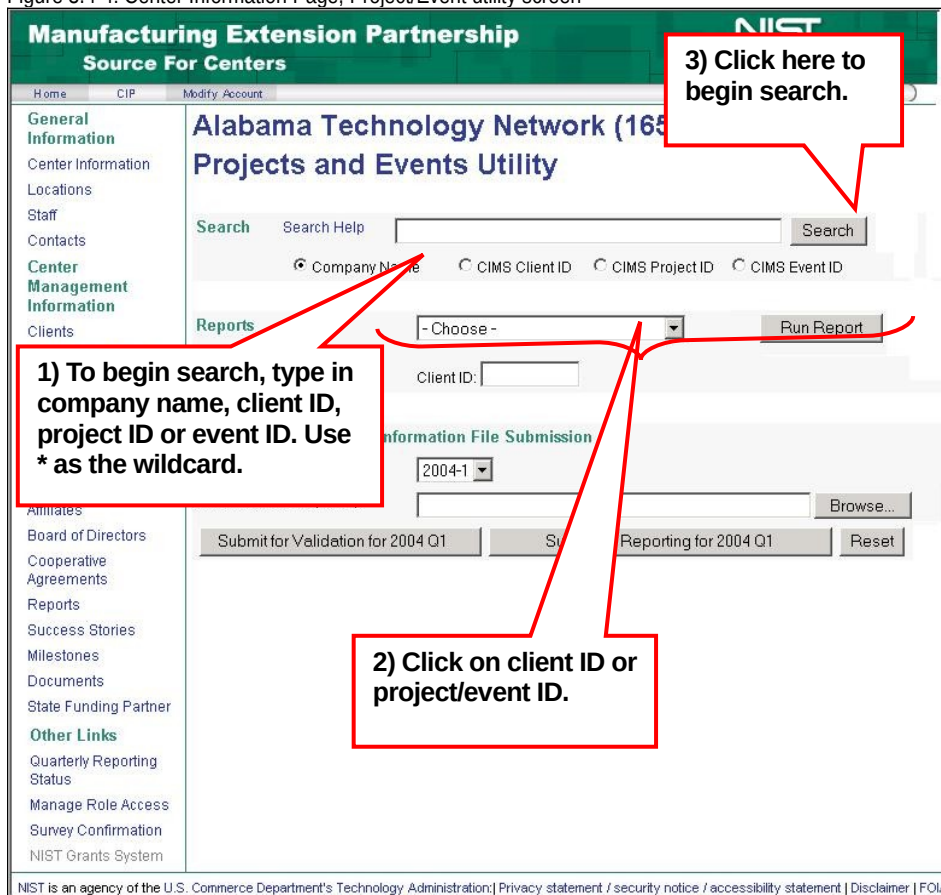
From the Center Information Page, click on the link for Project and Events. See figure 3.4-2.

Next, from the Projects/Events Utility screen, enter a CIMS Client ID, Project ID, Event ID or Company Name in the box next to the Search button.

Click on the radio button labeled "Company Name", "CIMS Client ID", "CIMS Project ID" or "CIMS Event ID". See figure 3.4-4.

Next, click the Search button.

Figure 3.4-4: Center Information Page, Project/Event utility screen





One or more Projects/Events will be listed. Click on Project/Event Title you want to view. See figure 3.4-5.

Figure 3.4-5: Center Information Page, Project/Event search results

The screenshot shows the website header with the NIST logo and navigation links. The main content area displays the title 'Alabama Technology Network (165) Projects and Events List' above a table of project data. A red callout box with the text 'Click on specific project title to view.' points to the 'Proj/Ev Title' column of the table.

CIMS Client ID	Client Name	Center Client ID	CIMS Proj/Ev ID	Proj/Ev Title	Center Proj/Ev ID	Partnership Account
58857	ABC Manufacturing	3341KL	118081	ISO 9001 documentati...	KLTEST1	MEP
58857	ABC Manufacturing	3341KL	27300	Lean Manufacturing O...	KLTEST2	MEP
58857	ABC Manufacturing	3341KL	118082	CAD software selecti...	KLTEST3	MEP

55. Figure 3.4.6 shows the Project/Event record. Review the Project/Event's data.

Figure 3.4-6: Center Information Page, Project/Event Read screen

<ul style="list-style-type: none"><li>General Information</li><li>Center Information</li><li>Locations</li><li>Staff</li><li>Contacts</li><li>Center Management Information</li><li>Clients</li><li>Projects and Events</li><li>Progress Data</li><li>Operating Plan</li><li>Progress Narrative</li><li>Partners</li><li>Affiliates</li><li>Board of Directors</li><li>Reports</li><li>Success Stories</li><li>Documents</li><li>State Funding Partner</li><li>Other Links</li><li>Quarterly Reporting Status</li><li>Manage Role Access</li><li>Survey Confirmation</li></ul>	<h3>Alabama Technology Network (165)</h3> <h4>View Project/Event Information</h4> <p><b>Project/Event Information</b></p> <table><tr><td>Delivery Mode:</td><td>Project</td></tr><tr><td>CIMS Proj/Event ID:</td><td>118082</td></tr><tr><td>Center Proj/Event ID:</td><td>KLTEST3</td></tr><tr><td>Client Name:</td><td>ABC Manufacturing</td></tr><tr><td>CIMS Client ID:</td><td>58857</td></tr><tr><td>Center Client ID:</td><td>3341KL</td></tr><tr><td>Substance:</td><td>14 - Information Technology</td></tr><tr><td>Type:</td><td>A - Assessment</td></tr><tr><td>Proj/Event Title:</td><td>CAD software selection</td></tr><tr><td>Reported Period:</td><td>2003-1</td></tr><tr><td>Start Date:</td><td>01/20/2003</td></tr><tr><td>End Date:</td><td>03/15/2003</td></tr><tr><td>Total Billed:</td><td>\$0</td></tr><tr><td>National Account:</td><td></td></tr><tr><td>Funding Source:</td><td>MEP</td></tr></table> <p><b>Project/Event Management Information</b></p> <table><tr><td>Center Contact:</td><td>Joe Fieldstaff</td></tr><tr><td>Center Hours:</td><td>250</td></tr><tr><td>Affiliate Organization:</td><td></td></tr><tr><td>Affiliate Contact:</td><td></td></tr><tr><td>Affiliate Hours:</td><td>0</td></tr></table> <hr/> <p><b>Record History</b></p> <table><tr><td>Created On/By:</td><td>03/20/2008 by Kathy Long</td></tr><tr><td>Updated On/By:</td><td>03/20/2008 by Kathy Long</td></tr></table>	Delivery Mode:	Project	CIMS Proj/Event ID:	118082	Center Proj/Event ID:	KLTEST3	Client Name:	ABC Manufacturing	CIMS Client ID:	58857	Center Client ID:	3341KL	Substance:	14 - Information Technology	Type:	A - Assessment	Proj/Event Title:	CAD software selection	Reported Period:	2003-1	Start Date:	01/20/2003	End Date:	03/15/2003	Total Billed:	\$0	National Account:		Funding Source:	MEP	Center Contact:	Joe Fieldstaff	Center Hours:	250	Affiliate Organization:		Affiliate Contact:		Affiliate Hours:	0	Created On/By:	03/20/2008 by Kathy Long	Updated On/By:	03/20/2008 by Kathy Long
Delivery Mode:	Project																																												
CIMS Proj/Event ID:	118082																																												
Center Proj/Event ID:	KLTEST3																																												
Client Name:	ABC Manufacturing																																												
CIMS Client ID:	58857																																												
Center Client ID:	3341KL																																												
Substance:	14 - Information Technology																																												
Type:	A - Assessment																																												
Proj/Event Title:	CAD software selection																																												
Reported Period:	2003-1																																												
Start Date:	01/20/2003																																												
End Date:	03/15/2003																																												
Total Billed:	\$0																																												
National Account:																																													
Funding Source:	MEP																																												
Center Contact:	Joe Fieldstaff																																												
Center Hours:	250																																												
Affiliate Organization:																																													
Affiliate Contact:																																													
Affiliate Hours:	0																																												
Created On/By:	03/20/2008 by Kathy Long																																												
Updated On/By:	03/20/2008 by Kathy Long																																												

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**Field Descriptions for the Project Information File**

Table 3.4-5: Field Descriptions for the Project/Event Information File

Field Name	Instruction(s)	Example(s)	Notes
ID	Provide unique project/event identifier code. This field is required and cannot be left blank.	7645, 7209, 74-1239876-1 43567, 43567 C3-Tech, C3-Tech	This field used to uniquely identify the project or event in which the center served client(s).
Client ID	Provide code that uniquely identifies the client.	74-1239876-2 or 3487783	This field enables NIST MEP to track CME impacts while preserving the anonymity of the client firm.  To report Events, list each client ID served, separated by a comma with no spaces.
Title	The survey process provides each client with a list of the projects that have been completed with the center and will pull those project titles directly from this field. Entries in this field should now be phrased as project titles that will be recognizable to the client, rather than as lengthy descriptions designed for any other purpose.  Use standard product service titles for 360vu related services.	Customer satisfaction measurement system.	A short description allows the interviewer to mention the projects completed to trigger the memory of the center and the work completed.
Start Date	Provide date project/event was started Enter the 4-digit year, month, and day in the format YYYY-MM-DD. This field is required and cannot be left blank.	2003-11-25	Check the start date to be sure that it is before the end date.  This field indicates the date on which the project/event began. This information helps gauge the length of service delivery.
End Date	Provide date the project/event was completed. Enter the 4-digit year, month, and day in the format YYYY-MM-DD. This field is required and cannot be left blank.  Dates as early as one year before the reporting quarter start date will be accepted, but the center must confirm that the records were not submitted in a previous period.	2003-12-10	This field indicates the date on which the project/event ended. This information helps gauge the length of service delivery.
Delivery Mode	Enter delivery mode of project/event (e.g., P for Project and E for Event.)	P or E	This refers to delivery of substantive work.
Substance	Provide one of the substance areas. Choose the one code which best describes the primary focus of the project/event. Refer to Key Concepts for a list of substance codes. This field is required and cannot be left blank.	11 or 12 or 13 or 14 or 15 or 16	This information is useful in analyzing relationships between impacts and different project/event subject matters.
Type	Enter type of project/event (e.g., Assessment, Technical Assistance, or Education and Training)	T or A or E	

Field Name	Instruction(s)	Example(s)	Notes
Center Contact	Provide first and last names of the primary center staff person who worked with the client. Use name that was provided to client, which may be their nickname, and not necessarily their formal or legal name. This field is required and cannot be left blank. Contact's name must be registered on the Source for Centers.	Skip Jones instead of Robert Jones: Robert Jones uses nickname, Skip, in his daily business with clients.	Mentioning the center staff person's name during the interview may help jog the client contact's memory and can help them make the association between the person who worked with them and the center.
Center Hours	Provide total center staff hours spent directly on the project/event. Include all hours billed (or would bill if this project/event is not for fee or for a flat fee) to the client. Enter only whole numbers greater than zero. Do not enter commas to separate thousands and do not enter decimals. This field is required and cannot be left blank.	A center field agent reports spending 9 hours providing services to the client – enter 9 in this field.  A center bills a CME \$500 for a project/event, and the state matches the payment dollar-for-dollar. As a result, the center collects a total of \$1,000. If the center charges an average of \$80 per hour of direct client interaction, the hours entered in this field would be calculated as $\$1000 / \$80 \text{ per hour} = 12.5 \text{ hours}$ ; round to 13 hours.	This field records the number of hours the center staff spent on the project/event.
Affiliate Organization	Provide name of the affiliate organization used to deliver services to the client (if any).  Check the affiliate provider fields. If there is information in this field, the following fields must also contain information: affiliate provider staff person's name, and affiliate hours.	Quality Consultants Inc.	Mentioning the affiliate's provider organization name may help clients recall the service(s) provided. It also may help clients understand that the survey attempts to capture all inputs for the project/event – including work the center may have brokered or subcontracted.
Affiliate Contact	Provide first and last names of the affiliate provider's staff person who worked with the client (if any). Use name that was provided to client, which may be their nickname, and not necessarily their formal or legal name.  Check the affiliate provider fields. If there is information in this field, the following fields must also contain information: affiliate Organization Name, affiliate hours.	Skip Jones instead of Robert Jones: Robert Jones uses nickname, Skip, in his daily business with clients.	Mentioning their name during the interview may help jog the client contact's memory and can help them make the association between the person who worked with them and the center.
Affiliate Hours	Provide total affiliate hours spent directly on the project/event. Include all hours affiliate providers bill (or would bill if this project/event is not for fee or for a flat fee) to the client. Combine all affiliate hours if multiple providers contributed to the project/event. If the information is not available, estimate the hours by dividing the total affiliate billings by the average hourly rate charged to clients by the provider. Enter only whole numbers greater than zero. Do not enter commas to separate thousands and do not enter decimals.  Check the affiliate provider fields.	Affiliate provider #1 bills a client \$1,000 for a project/event, and affiliate provider #2 bills the same client and additional \$300 for the same project/event. If provider #1 bills at \$150 per hour and provider #2 bills at \$100 per hour, the total hours are entered in this field would be calculated: $(\$1,000 / \$150 \text{ per hour}) + (300 / \$100 \text{ per hour}) = 9.67 \text{ hours}$ ; round to 10 hours.	This field records the hours spent by any affiliate provider on the project/event.

Field Name	Instruction(s)	Example(s)	Notes
	If there is information in this field, the following fields must also contain information: affiliate provider staff person's name, and affiliate organization name.		
System Account	Provide the code of the System Account the Project or Event is in support of.  System Accounts are coded by using the company's ticker symbol followed by the initiative number.	<ul style="list-style-type: none"> <li>• BAX01- Baxter</li> <li>• BOE01- Boeing</li> <li>• DE01 – John Deere Value Stream Mapping</li> <li>• DF01 – Dawn Foods</li> <li>• EDM01 – Electro Motive Diesel</li> <li>• EWW01 – Eureka! Winning Ways</li> <li>• HS01 – Heidtman Steel</li> <li>• LB01- Lasco Bathware</li> <li>• MEDT01 – MedSource Technologies Inc.</li> <li>• NG01 – Northrop Grumman Supply Chain</li> <li>• OS01 – O'Neal Steel</li> <li>• PAC01 – Pactiv</li> <li>• PP01 – Pretium Packaging</li> <li>• RC01 – Red Cross</li> <li>• SEI01 – Suez Energy</li> <li>• SIM01 - Simplot</li> <li>• UFP01 – Universal Forest Products</li> <li>• UTC01- United Technologies Corp.</li> </ul>	This field indicates work on System Account initiatives.
Total Billed	Provide the total amount billed to the Client(s) for the services rendered within the project or event. Do not include the dollar sign (\$), commas, or decimals.	1000 or 390.	This information reflects how much the client was willing to pay for the service delivered by the center. List the total fees billed to all clients for the event, not the average per client. For example if 4 clients attend an event, clients 1, 2, and 3 pay \$250, client 4 pays \$500, the total billed for the event is \$1,250.
Federal Partnership	Provide the project's source for funding.	<ul style="list-style-type: none"> <li>• DOC</li> <li>• DOC2</li> <li>• DOE</li> <li>• DOL1</li> <li>• EDA1</li> <li>• EPA</li> <li>• EPA2</li> <li>• MEP</li> <li>• MIL</li> <li>• NIH</li> </ul>	This information reflects matching federal funds on projects and events.
EIS_Years	Provide the projects' years to be surveyed	<ul style="list-style-type: none"> <li>• 1, 3, 4, 5, 6, 10, 15</li> <li>• NOTE: 2 is not allowed</li> </ul>	For short-term survey, enter 1 For long-term survey, enter 3 or greater

### Making Corrections or Changes to Project/Event Information

Centers are responsible for making all corrections to their project data. If corrections are needed after the PIF is submitted, the Center Director or Center Reporting Contact must request the change by

sending an e-mail message to the MEP Quarterly Reporting Contact (refer to the MEP Contacts section for the appropriate contact name and address).

## Progress Data

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The Progress Data is submitted quarterly and collects information on center operations including accounting data and activity levels for the quarter.

The purpose of the Progress Data is to capture all work including Other Agency activities outlined in your Operating Plan and Budget. Report all interactions conducted by the center on the progress data form, both substantive and non-substantive.

The Progress Data is not a summary of the PIF and CIF, but a summary of **all work** conducted by the center. The data is used by NIST MEP to generate standard reports used by NIST MEP and centers to do the following:

- **Report on program output;**
- **Make management decisions;**
- **Monitor center performance;**
- **Track center activity against operating plan goals and objectives; and**
- **Conduct center reviews.**

### *Reporting All Interactions (Both Substantive and Non-Substantive)*

Centers should report interactions, FTEs, expenses, and revenues from other agency funding as outlined in your Operating Plan and Budget. It is not expected that your Progress Data submission and Operating Plan Budget will match dollar for dollar. Specific instructions for each type of funding are given in the sections below.

#### *Report All Interactions Including Other Agency Activities Outlined in Your Operating Plan and Budget*

Centers receiving other agency funds matching funds to conduct projects and events should report the related interactions on the Progress Data in the following fields:

- Total number of CMEs served over the past 12 months by a continuing project or event;
- Total number of projects completed during the quarter;
- Total number of events completed during the quarter;
- Number of projects on-going at the end of the quarter;
- FTEs (include those supported by other agency funding);
- Expenses incurred from other agency interactions; and
- Fees from Projects and Events -- do not include the other agency grant amount as revenue; however, do include revenues generated from clients served using other agency funds.

### *Requirements for Progress Data*

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The Progress Data is required by the terms and conditions of the Center's Cooperative Agreement. Progress Data must be submitted once per quarter.

### *Procedure for Submitting the Progress Data*

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The following procedure will provide centers with step-by-step instructions for submitting Progress Data information to NIST MEP.

The Center staff member submitting the Progress Data must have been assigned the Center Reporting role before they may submit data to NIST MEP. See section 2.4 of this document for instructions on how to assign roles.

Center Personnel will log into the MEP Source for Centers Web Site and navigate to the Center Information Page.

56. Click on the **Progress Data** link as shown below.

Figure 3.5-23: Center Information Page, Link to Progress Data

The screenshot displays the website for the Hollings Manufacturing Extension Partnership, specifically the Center Information page for the Alabama Technology Network (165). The page features a green header with the organization's name and the NIST logo. Below the header is a navigation menu with links for Home, CIP, Communities, Knowledge, Skills, Successes, Conferences, Polls, My Account, and Logout. The main content area is titled "Alabama Technology Network (165) Center Information" and is organized into several sections: "General Information" (Center Information, Contacts, Locations, Staff), "Center Management Information" (Clients, Partners, Projects and Events, Affiliates, Progress Data, Board of Directors, Operating Plan, Reports, Progress Narratives, Success Stories, State Funding Partners, Documents), and "Other Links" (Quarterly Reporting Status, Manage Role Access, Survey Confirmation). A red box highlights the "Progress Data" link, with a red arrow pointing to it and the text "Click here." written inside the box. At the bottom of the page, there is a footer with the text "NIST is an agency of the U.S. Commerce Department: Privacy statement / security notice / accessibility statement | Disclaimer | FOIA".



57. Click on the “**Compose Progress Data Record**” link, see figure 3.5-2. This will open the Progress Data Form.

Figure 3.5-2: Center Information Page, Link to Progress Data Form

The screenshot shows the website interface for the Hollings Manufacturing Extension Partnership. The header includes the logo and name of the partnership, along with the NIST logo. A navigation menu is located below the header. The main content area displays the title 'Alabama Technology Network (165) Progress Data' and a table of progress data records. A red callout box with a white background and black text points to the 'Compose Progress Data Record' link in the top right corner of the table area. The callout text reads: 'Click here to open the Progress Data Form.'

CIMS ID	Reporting Period	Status	Last Updated
4884	2007 Q4 (10/01/2007 - 12/31/2007)	Final	02/15/2008 by Dan...
4825	2007 Q3 (07/01/2007 - 09/30/2007)	Final	02/11/2008 by Kimrick
4759	2007 Q2 (04/01/2007 - 06/30/2007)	Final	08/08/2007 by Lisa Stone
4702	2007 Q1 (01/01/2007 - 03/31/2007)	Final	08/08/2007 by Lisa Stone
4646	2006 Q4 (10/01/2006 - 12/31/2006)	Final	08/08/2007 by Lisa Stone
4578	2006 Q3 (07/01/2006 - 09/30/2006)	Final	08/08/2007 by Lisa Stone
4497	2006 Q2 (04/01/2006 - 06/30/2006)	Final	08/08/2007 by Lisa Stone
4440	2006 Q1 (01/01/2006 - 03/31/2006)	Final	08/08/2007 by Lisa Stone
4445	2005 Q4 (10/01/2005 - 12/31/2005)	Final	05/18/2006 by Joe Giannamore
4306	2005 Q3 (07/01/2005 - 09/30/2005)	Final	12/09/2005 by Joey Massey
4214	2005 Q2 (04/01/2005 - 06/30/2005)	Final	08/05/2005 by Joey Massey
4155	2005 Q1 (01/01/2005 - 03/31/2005)	Final	05/28/2005 by Joey Massey
4074	2004 Q4 (10/01/2004 - 12/31/2004)	Final	01/31/2005 by Joey Massey
4029	2004 Q3 (07/01/2004 - 09/30/2004)	Final	11/02/2004 by Joey Massey
3966	2004 Q2 (04/01/2004 - 06/30/2004)	Final	08/03/2004 by Brian Clark
3912	2004 Q1 (01/01/2004 - 03/31/2004)	Final	04/30/2004 by Joey Massey
3814	2003 Q4 (10/01/2003 - 12/31/2003)	Final	02/02/2004 by Kim Hamrick
2578	2003 Q3 (07/01/2003 - 09/30/2003)	Final	12/27/2003 by System Administrator

58. Next, select the **Reporting Period** (year-quarter) for which you are entering data. See figure 3.5-3. A new Progress Data Record will open as shown in figure 3.5-4.

Figure 3.5-3: Progress Data form, read

**Hollings Manufacturing Extension Partnership**  
Source for Centers

NIST  
National Institute of Standards and Technology

Home CIP Communities Knowledge Skills Successes Conferences Polls My Account Logout

**ABC Center (223)**  
**Progress Data**

Progress Data

Note: denotes that the field is required.

Reporting Period: 2007-4

We have reviewed, and if necessary, initiated the process to change our business information as submitted to NIST Grants Office.

**Revenues:**

Description	Amount
Fees from projects and events	0.00
Other Fees	
<b>Total:</b>	<b>\$0.00</b>

**Expenses:**

	Cash	In-Kind
Personnel	10	0
Fringe Benefits	015	0
Travel	020	0
Equipment	025	0
Supplies	030	0
Contractual Services	035	0
Affiliate Services	040	0
Other	045	0
Indirect Charges	050	0
<b>Total:</b>	<b>\$270.00</b>	<b>\$0.00</b>

**FTEs:**

Technical Specialists	0.00
Sales Staff	0.00
Management Staff	0.00
Other Support Staff	0.00
<b>Total Staff:</b>	<b>0.00</b>

**Services:**

Total number of projects completed during the quarter.	0
Total number of events completed during the quarter.	0
Number of projects ongoing at the end of quarter.	0
Total number of CMEs served over the past 12 months by a completed or continuing project or event.	0

Submit Reset Submit for Reporting for 2007 Q4

59. Using the Table 3.5-1 as a reference, the designated center personnel will enter information into predefined text fields. Figure 3.5-4 is a summary of the Progress Data form. (Note: To add "Other Fees" click the **Add Fee** button. To delete "Other Fees", click the "Delete Checked Fees" button.)

Figure 3.5-4: Progress Data form, edit

**Hollings Manufacturing Extension Partnership**  
Source for Centers

**NIST**  
National Institute of Standards and Technology

Home CIP Communities Knowledge Skills Successes Conferences Polls My Account Logout

**Alabama Technology Network (165)**  
**Progress Data**

Progress Data

Note: \* denotes that the field is required.

Reporting Period: 2008-1

We have reviewed, and if necessary, initiated the process to change our budget information as submitted to NIST Grants Office. \*

**Revenues:**

Description	Amount
Fees from projects and events	0.00
Other Fees	
<b>Total:</b>	<b>\$0.00</b>

Buttons: Add Fee, Delete Checked Fees

**FTEs:**

	Cash	In-Kind
Personnel	0	0
Travel	0	0
Equipment	0	0
Supplies	0	0
Contractual Services	0	0
Affiliate Services	0	0
Other	0	0
Indirect Charges	0	0
<b>Total:</b>	<b>\$0.00</b>	<b>\$0.00</b>

**Services:**

Total number of projects completed during the quarter. *	0
Total number of events completed during the quarter. *	0
Number of projects ongoing at the end of quarter. *	0
Total number of CMEs served over the past 12 months by a completed or continuing project or event. *	0

Buttons: Submit, Reset, Submit for Reporting for 2008 Q1

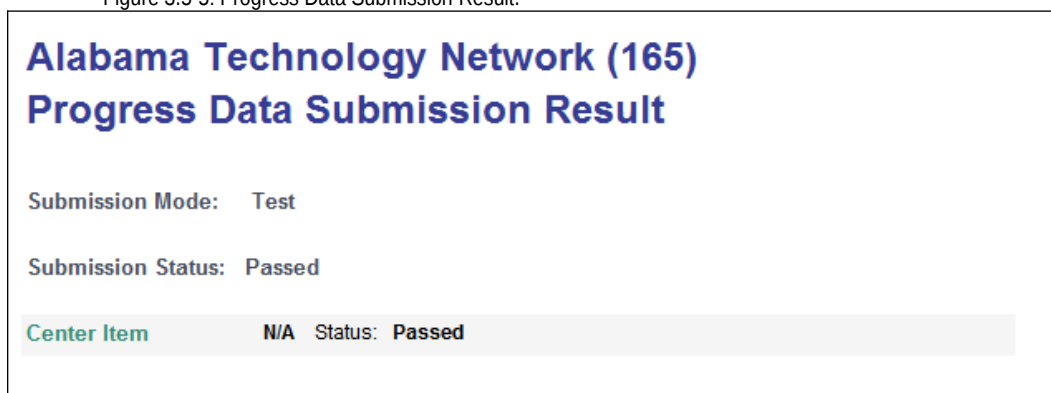
Record History

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60. Click on the **Submit** button to save your work. By clicking the Submit button, the center may submit the file in draft format and continue entering information at a later date.
61. Click the **Submit for Reporting** button when the report is final (no additional editing is allowed). The **Submit for Reporting** button saves information and updates the Quarterly Reporting Status to indicate quarterly reporting guidelines have been met.
62. Once the **Submit for Reporting** button has been clicked a **Submission Result** window will pop-up. The Submission Result window verifies that your Progress Data submission has passed the validation checks.

**Note:** The submission is considered to be a draft report until the “Submit for Reporting” button has been clicked. While in draft format or “In Process”, the Center can edit the Progress Data form by clicking on the Progress Data Form link, then Edit Progress Data Record link. After the final report is submitted to NIST MEP, it will be reviewed and the center will be contacted if necessary.

Figure 3.5-5: Progress Data Submission Result.



The screenshot shows a window titled "Alabama Technology Network (165) Progress Data Submission Result". Below the title, it displays "Submission Mode: Test" and "Submission Status: Passed". At the bottom, there is a table with one row: "Center Item" (in green text), "N/A", and "Status: Passed".

Center Item	Status
N/A	Passed

*Procedures for Viewing Progress Data*

To view your Progress Data, click on the Reporting Period you want to see. For example, **2003 Q3 (07/01/2003 – 09/30/2003)**.

Figure 3.5-6: Center Information Page, Link to Progress Data

The screenshot shows the website interface for the Alabama Technology Network (165) Progress Data. The header includes the Hollings Manufacturing Extension Partnership logo and the NIST National Institute of Standards and Technology logo. The navigation menu includes Home, CIP, Communities, Knowledge, Skills, Successes, Conferences, Polls, My Account, and Logout. The left sidebar contains a menu with categories like General Information, Center Information, Locations, Staff, Contacts, Center Management Information, Clients, Projects and Events, Progress Data, Operating Plan, Progress Narrative, Partners, Affiliates, Board of Directors, Reports, Success Stories, Documents, State Funding Partner, and Other Links. The main content area displays a table of progress data with columns for CIMS ID, Reporting Period, Status, and Last Updated. A red box highlights the row for '2003 Q3 (07/01/2003 - 09/30/2003)', and a red arrow points to it from a text box that says 'Click here to view Progress Data'.

CIMS ID	Reporting Period	Status	Last Updated
4884	2007 Q4 (10/01/2007 - 12/31/2007)	Final	02/15/2008 by Dana Stone
4825	2007 Q3 (07/01/2007 - 09/30/2007)	Final	02/11/2008 by Kim Hamrick
4759	2007 Q2 (04/01/2007 - 06/30/2007)	Final	08/06/2007 by Dana Stone
4702	2007 Q1 (01/01/2007 - 03/31/2007)	Final	05/14/2007 by Dana Stone
4646	2006 Q4 (10/01/2006 - 12/31/2006)	Final	03/22/2007 by Deirdre McMahon
4578	2006 Q3 (07/01/2006 - 09/30/2006)	Final	03/09/2007 by Kim Hamrick
4497	2006 Q2 (04/01/2006 - 06/30/2006)	Final	08/01/2006 by Joey Massey
4440	2006 Q1 (01/01/2006 - 03/31/2006)	Final	05/08/2006 by Joey Massey
4445	2005 Q4 (10/01/2005 - 12/31/2005)	Final	05/18/2006 by Joe Giannamore
4306	2005 Q3 (07/01/2005 - 09/30/2005)	Final	09/09/2005 by Joey Massey
4214	2005 Q2 (04/01/2005 - 06/30/2005)	Final	08/01/2005 by Joey Massey
4155	2005 Q1 (01/01/2005 - 03/31/2005)	Final	03/01/2005 by Joey Massey
4074	2004 Q4 (10/01/2004 - 12/31/2004)	Final	02/02/2004 by Kim Hamrick
4029	2004 Q3 (07/01/2004 - 09/30/2004)	Final	12/27/2003 by System Administrator
3986	2004 Q2 (04/01/2004 - 06/30/2004)	Final	02/02/2004 by Kim Hamrick
3912	2004 Q1 (01/01/2004 - 03/31/2004)	Final	12/27/2003 by System Administrator
3814	2003 Q4 (10/01/2003 - 12/31/2003)	Final	02/02/2004 by Kim Hamrick
2578	2003 Q3 (07/01/2003 - 09/30/2003)	Final	12/27/2003 by System Administrator

63. Your Progress Data form will open in read only mode. See figure 3.5-7.

Figure 3.5-7: Progress Data form, read

**Hollings Manufacturing Extension Partnership**  
Source for Centers

NIST  
National Institute of Standards and Technology

Home CIP Communities Knowledge Skills Successes Conferences Polls My Account Logout

**General Information**  
Center Information  
Locations  
Staff  
Contacts

**Center Management Information**  
Clients  
Projects and Events  
Progress Data  
Operating Plan  
Progress Narrative  
Partners  
Affiliates  
Board of Directors  
Reports  
Success Stories  
Documents  
State Funding Partner

**Other Links**  
Quarterly Reporting Status  
Manage Role Access  
Survey Confirmation

### ABC Center (223) Progress Data

Progress Data

Note: \* denotes that the field is required.  
Reporting Period: 2007-4

We have reviewed, and if necessary, initiated the process to change our budget information as submitted to NIST Grants Office.

**Revenues:**

Description	Amount
Fees from projects and events *	0.00
Other Fees	
<b>Total:</b>	<b>\$0.00</b>

**Expenses:**

	Cash	In-Kind
Personnel	10	0
Fringe Benefits	015	0
Travel	020	0
Equipment	025	0
Supplies	030	0
Contractual Services	035	0
Affiliate Services	040	0
Other	045	0
Indirect Charges	050	0
<b>Total:</b>	<b>\$270.00</b>	<b>\$0.00</b>

**FTEs:**

Technical Specialists *	0.00
Sales Staff *	0.00
Management Staff *	0.00
Other Support Staff *	0.00
<b>Total Staff:</b>	<b>0.00</b>

**Services:**

Total number of projects completed during the quarter. *	0
Total number of events completed during the quarter. *	0
Number of projects ongoing at the end of quarter. *	0
Total number of CMEs served over the past 12 months by a completed or continuing project or event. *	0

*Field Description for the Progress Data*

Table 3.5-9: Field Description for Progress Data Form

<b>Progress Data</b>	
<b>Field</b>	<b>Description</b>
Reporting Period (Required)	Year and quarter in which revenues were billed and expenses were incurred.
Center confirms box (Required)	We have reviewed, and if necessary, initiated the process to change our budget information as submitted to NIST Grants Office.
<b>REVENUES:</b>	
Fees from Projects and Events billed during the quarter	Enter sum of fees billed during quarter for assistance, assessments, training activities, and events. Round all values to closest dollar. This information is required and may not be left blank. Valid entries: \$455,679 or \$1,000 or \$100.00 or \$0.00
Other Fees billed during the period (please describe)	Enter brief description of fee(s) billed during quarter. Up to three entries will be accepted. DO NOT INCLUDE NIST, other agency funds, or STATE/LOCAL FUNDING, GRANTS, or MATCH as FEES. Valid entries: Membership dues, Application fees, MIS fees, None, blank
<b>EXPENSES (separate fields for cash and in-kind)</b>	
<b>Field</b>	<b>Description</b>
Personnel	Enter the amount spent on Personnel.
Fringe Benefits	Enter the amount spent on Fringe Benefits.
Travel	Enter the amount spent on Travel.
Equipment	Enter the amount spent on Equipment.
Supplies	Enter the amount spent on Supplies.
Contractual services for the center	Enter the amount spent on Contractual services for the center, (i.e., 3 <sup>rd</sup> parties contracted for center support; <b>not</b> services delivered to clients.).
Affiliates services	Enter the amount spent on Affiliates for services performed for the center's clients, (3 <sup>rd</sup> parties contracted to deliver services to the center's clients.).
Other	Enter the amount spent on Other.
Indirect Charges	Enter the amount spent on Indirect Charges.

<b>FTEs: Full-time equivalent (FTE), (LEVEL OF EFFORT)</b>	
<b>Field</b>	<b>Description</b>
<b>Technical Specialists</b> (Required)	Enter the number of full-time equivalent (FTE) or level of effort for the <b>Technical Specialists</b> employed on the last day of the quarter. Technical Specialists information is required and may not be left blank. One FTE $\approx$ 2,080 hours per year, vacation time and sick time are included in this number. Ignore overtime. Deduct for time off without pay. A full-time position is expressed as 1.00, half-time as 0.50, and quarter-time as 0.25.
<b>Sales Staff</b> (Required)	Enter the number of full-time equivalent (FTE) or level of effort for the <b>Sales Staff</b> employed on the last day of the quarter. Sales Staff information is required and may not be left blank. One FTE $\approx$ 2,080 hours per year, vacation time and sick time are included in this number. Ignore overtime. Deduct for time off without pay. A full-time position is expressed as 1.00, half time as 0.50, and quarter-time as 0.25. Include two decimal places.
<b>Management Staff</b> (Required)	Enter the number of full-time equivalent (FTE) or level of effort for the <b>Management Staff</b> employed on the last day of the quarter. Management Staff information is required and may not be left blank. One FTE $\approx$ 2,080 hours per year, vacation time and sick time are included in this number. Ignore overtime. Deduct for time off without pay. A full-time position is expressed as 1.00, half-time as 0.50, and quarter-time as 0.25.
<b>Other Support Staff</b> (Required)	Enter the number full-time equivalent (FTE) or level of effort for the <b>Other Support Staff</b> employed on the last day of the quarter. Other Support Staff information is required and may not be left blank. One FTE $\approx$ 2,080 hours per year, vacation time and sick time are included in this number. Ignore overtime. Deduct for time off without pay. A full-time position is expressed as 1.00, half-time as 0.50, and quarter-time as 0.25.



<b>Project, Event, and Client Information</b>	
Total Number of projects completed this quarter <b>(Required)</b>	Total number of substantive and non-substantive projects completed during the quarter. Refer to Key Concepts for an explanation of how to classify activities. This information is required and may not be left blank.  <b>Example: during the quarter the center completed 12 substantive projects (expect quantifiable impacts) with 10 distinct clients and reported interactions on the CIF and PIF. The center also completed 5 non-substantive projects (no impact expected), with 4 distinct clients. The center will report a total of 17 projects.</b>
Total Number of events completed this quarter <b>(Required)</b>	Total number of substantive and non-substantive events completed during the quarter. Refer to Key Concepts for an explanation of how to classify projects. This information is required and may not be left blank.  <b>Example: during the quarter the center completed 1 substantive (expect quantifiable impacts) with 5 distinct clients and reported the interactions on the CIF and PIF. The center also completed 10 non-substantive events (no impact expected) with 100 distinct clients. The center will report a total of 11 events.</b>
Total number of projects ongoing at the end of this quarter <b>(Required)</b>	Total number of open substantive projects (work has begun, but has not yet been completed) on the last day of the quarter. This information is required and may not be left blank.  <b>Example: during the quarter the center has 15 ongoing projects to be completed sometime after the last day of the quarter. The center reports a total of 15 ongoing projects.</b>
Total number of CMEs served over the past 12 months by a completed or continuing project or event <b>(Required)</b>	Enter the total number of CMEs served by a completed or continuing project or event for the past 12 months regardless of the length or type of project or event. This is a cumulative count of all distinct clients. Do not report the sum of separate quarterly submissions since it will result in double counting of those clients served in more than one quarter. This information is required and may not be left blank.  <b>Example: in the past 12 months the center conducted or is conducting 300 projects with 200 distinct clients and conducted or is conducting 30 events with 200 distinct clients (excluding those that were worked with on projects). The center will report a total of 400 distinct clients.</b>

***Making Corrections or Changes to the Progress Data***

Centers are responsible for making all corrections or changes directly to the data fields. The report will remain editable until the “Submit for Reporting” button has been clicked. If corrections are needed after the “Submit for Reporting” button has been clicked, the Center Director or Center Reporting Contact must request the change by sending an e-mail message to the MEP Quarterly Reporting Contact. Refer to the MEP Contacts in section 6 for the appropriate contact name and address.

## Operating Plan

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The Center's Operating Plan must be reviewed and updated quarterly if changes are needed. The Operating Plan provides the NIST MEP Federal Program Officer (FPO) and Account Managers with information about the operations of the center. FPOs and Account Managers will use this information in their day-to-day role as consultants to the center. Only one plan may be in effect for a given period of time.

### 3.6.1 Requirements for the Operating Plan

---

The Operating Plan is required by the terms and conditions of the center's cooperative agreement. Operating plans will be updated and submitted to NIST MEP annually. The Operating Plan will be reviewed quarterly and updated if needed. The electronic file must be in Microsoft Word (Word) using the registered (.doc) file extension.

Centers are required to follow the Operating Plan Guidelines when preparing the Operating Plan. The guidelines are available on the MEP Source for Centers site CFO COP under documents heading.

Procedure for Submitting the Operating Plan to NIST/MEP

The following procedures will provide step-by-step instructions for submitting the Operating Plan to NIST/MEP and for reviewing the Operating Plan from the Center Information Page.

- 31) At least 90 days prior to current Cooperative Agreement year's end, Center personnel will send an electronic draft version of upcoming operating period via e-mail to the MEP FPO. Refer to Contact Information on your center's Center Information Page for the appropriate FPO's name, e-mail address, and telephone number.
- 32) The FPO will review the plan. The Center Director will be contacted if questions arise.
- 33) At least 60 days prior to current Cooperative Agreement year's end, Center personnel will send a hard copy version of next year's Operating Plan via mail to the MEP FPO. Refer to Contact Information on your center's Center Information Page for the appropriate FPO's name, mail address, and telephone number.
- 34) FPO/Account Manager recommends the Operating Plan and financials for approval to the Director of System Operations/Grants Office. The package is then signed by Director of System Operations and submitted to the NIST Grants Office.
- 35) After the document has been approved, the MEP FPO will post the Operating Plan to the center's Center Information Page where the center will be able to read their Operating Plans and review for Quarterly Reporting.
- 36) The FPO will then include the signed Operating Plan in the Cooperative Agreement Renewal Package sent to Grants Office.

**3.6.2 Procedure for Reviewing the Operating Plan**

37) Center personnel will log into the MEP Source for Centers Web Site and navigate to the Center Information Page.

38) From the Center Information Page select the **Operating Plan** link as shown in figure 3.6-1.

Figure 3.6-24: Center Information Page, Operating Plan Link

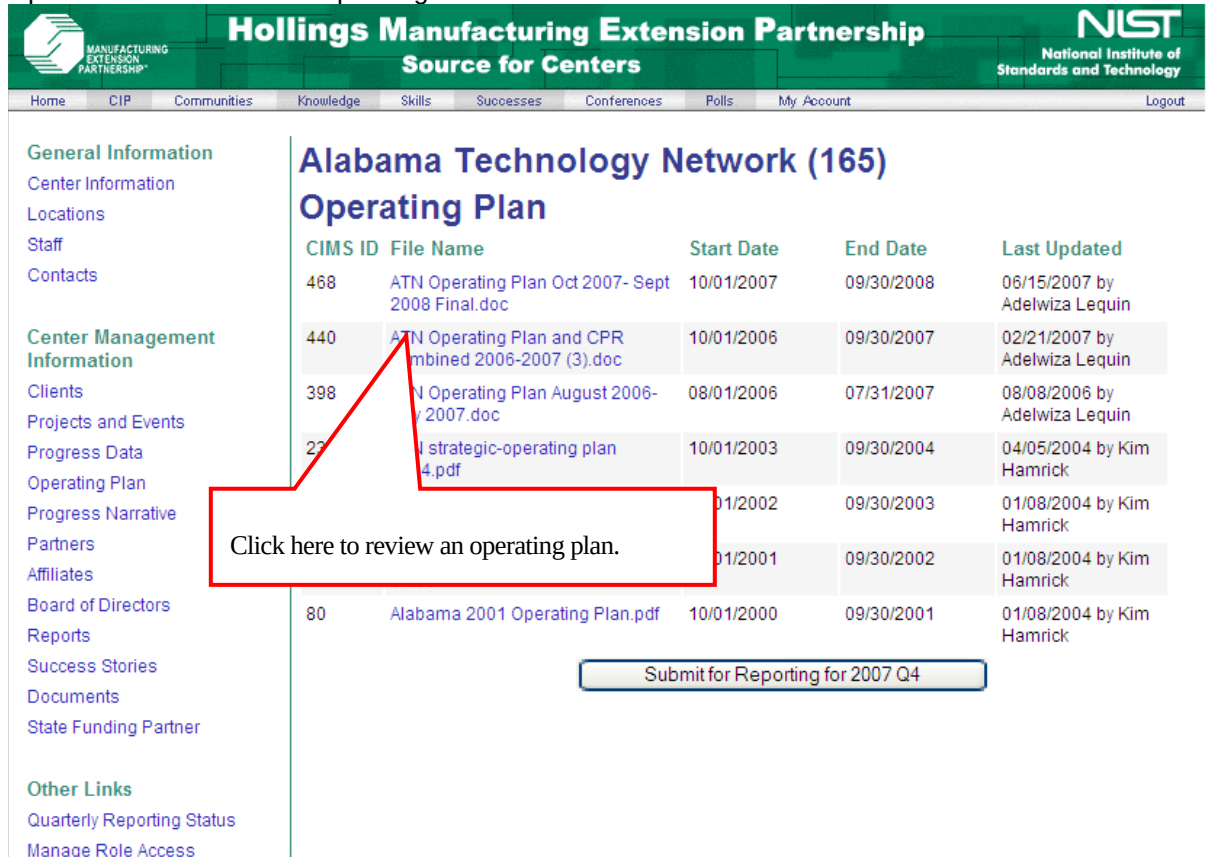


- 39) A list of Operating Plans will be displayed. Click on the document name to open and view the Operating Plan as shown in Figure 3.6-2.
- 40) If your Operating Plan has not changed, click the **Submit For Reporting** button to update the quarterly reporting status to indicate quarterly reporting guidelines have been met.

Figure 6-25: Operating Plan Link

### 3.6.3 Descriptions for the Operating Plan

See the NIST MEP Operating Plan guidelines on the Source for Centers under Center Operations – Procedures – Operating Plans.



**Hollings Manufacturing Extension Partnership**  
**Source for Centers**

NIST  
National Institute of Standards and Technology

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**Center Management Information**  
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**Other Links**  
Quarterly Reporting Status  
Manage Role Access

## Alabama Technology Network (165) Operating Plan

CIMS ID	File Name	Start Date	End Date	Last Updated
468	ATN Operating Plan Oct 2007- Sept 2008 Final.doc	10/01/2007	09/30/2008	06/15/2007 by Adelwiza Lequin
440	ATN Operating Plan and CPR Combined 2006-2007 (3).doc	10/01/2006	09/30/2007	02/21/2007 by Adelwiza Lequin
398	ATN Operating Plan August 2006- July 2007.doc	08/01/2006	07/31/2007	08/08/2006 by Adelwiza Lequin
23	ATN strategic-operating plan 4.pdf	10/01/2003	09/30/2004	04/05/2004 by Kim Hamrick
		01/2002	09/30/2003	01/08/2004 by Kim Hamrick
		01/2001	09/30/2002	01/08/2004 by Kim Hamrick
80	Alabama 2001 Operating Plan.pdf	10/01/2000	09/30/2001	01/08/2004 by Kim Hamrick

Submit for Reporting for 2007 Q4

Click here to review an operating plan.

## Progress Narrative

---

The Progress Narrative is a text-based submission that provides NIST MEP with qualitative information on the following:

- Updates on progress towards operating plan goals; and
- Updates on partnership and state relations.

The Progress Narrative will inform NIST MEP of progress achieved towards specific items contained in the Center's Operating Plan. The Progress Narrative will also serve as a tool to monitor centers progress on its operating plan in a more qualitative way in addition to measuring performance.

### *3.7.1 Requirements for Progress Narrative*

The Progress Narrative is required by the terms and conditions of the Center's Cooperative Agreement. Center personnel will submit their Progress Narrative once per quarter.

### *Procedure for Submitting the Progress Narrative*

The following procedure will provide centers with step-by-step instructions for submitting the Progress Narrative information to NIST MEP.

The Center staff member submitting the Progress Narrative must be assigned the Center Reporting role before they may submit data to NIST MEP. See section 2.4 of this document for instructions on how to assign roles.

Center personnel will log into the MEP Source for Centers and navigate to the Center Information Page.

From the Center Information Page select the **Progress Narrative** link as shown in Figure 3.7-1.

**NIST MEP encourages centers to create the Progress Narrative report using a word processing program and then cut and paste the information into the online form. It is generally not a good idea to compose long narratives on the Web, since a network problem could cause you to lose information before you have saved your work.**

Figure 3.7-26: Center Information Page, Progress Narrative Link

**Hollings Manufacturing Extension Partnership**  
Source for Centers

**NIST**  
National Institute of Standards and Technology

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## Alabama Technology Network (165) Center Information

**General Information**

<a href="#">Center Information</a>	<a href="#">Contacts</a>
<a href="#">Locations</a>	<a href="#">Staff</a>

**Center Management Information**

<a href="#">Clients</a>	<a href="#">Partners</a>
<a href="#">Projects and Events</a>	<a href="#">Affiliates</a>
<a href="#">Progress Data</a>	<a href="#">Board of Directors</a>
<a href="#">Operating Plan</a>	<a href="#">Reports</a>
<a href="#">Progress Narrative</a>	<a href="#">Success Stories</a>
<a href="#">State Funding Partner</a>	<a href="#">Documents</a>

**Other Links**

- [Quarterly Reporting Status](#)
- [Manage Role Access](#)
- [Survey Confirmation](#)



**General Information**

- [Center Information](#)
- [Locations](#)
- [Staff](#)
- [Contacts](#)

**Center Management Information**

- [Clients](#)
- [Projects and Events](#)
- [Progress Data](#)
- [Operating Plan](#)
- [Progress Narrative](#)
- [Partners](#)
- [Affiliates](#)
- [Board of Directors](#)
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- [Documents](#)
- [State Funding Partner](#)

**Other Links**

- [Quarterly Reporting Status](#)
- [Manage Role Access](#)
- [Survey Confirmation](#)

## Alabama Technology Network (165) Progress Narratives List

[Compose Progress Narrative](#)

CIMS ID	Reporting Period	Status	Last Updated
2162	2008 Q4 (10/01/2008 - 12/31/2008)	Final	02/09/2009 by Dana Stone
2099	2008 Q3 (07/01/2008 - 09/30/2008)	Final	11/10/2008 by Dana Stone
2044	2008 Q2 (04/01/2008 - 06/30/2008)	Final	08/12/2008 by Dana Stone
1986	2008 Q1 (01/01/2008 - 03/31/2008)	Final	05/23/2008 by Dana Stone
1922	2007 Q4 (10/01/2007 - 12/31/2007)	Final	02/19/2008 by Dana Stone
1864	2007 Q3 (07/01/2007 - 09/30/2007)	Final	11/26/2007 by Dana Stone
1803	2007 Q2 (04/01/2007 - 06/30/2007)	Final	08/10/2007 by Dana Stone
1748	2007 Q1 (01/01/2007 - 03/31/2007)	Final	05/30/2007 by Dana Stone
1686	2006 Q4 (10/01/2006 - 12/31/2006)	Final	02/12/2007 by Dana Stone
1616	2006 Q3 (07/01/2006 - 09/30/2006)	Final	11/28/2006 by Dana Stone
1544	2006 Q2 (04/01/2006 - 06/30/2006)	Final	08/03/2006 by Dana Stone
1489	2006 Q1 (01/01/2006 - 03/31/2006)	Final	05/10/2006 by Dana Stone
1436	2005 Q4 (10/01/2005 - 12/31/2005)	Final	02/13/2006 by Joe Giannamore
1384	2005 Q3 (07/01/2005 - 09/30/2005)	Final	12/07/2005 by Joe Giannamore
1327	2005 Q2 (04/01/2005 - 06/30/2005)	Final	09/26/2005 by Joe Giannamore
1262	2005 Q1 (01/01/2005 - 03/31/2005)	Final	05/06/2005 by Dana Stone
1201	2004 Q4 (10/01/2004 - 12/31/2004)	Final	02/02/2005 by Dana Stone
1151	2004 Q3 (07/01/2004 - 09/30/2004)	Final	11/05/2004 by Dana Stone
1094	2004 Q2 (04/01/2004 - 06/30/2004)	Final	08/17/2004 by Dana Stone
1034	2004 Q1 (01/01/2004 - 03/31/2004)	Final	05/05/2004 by Kim Hamrick



64.

3) Click on the “**Compose Progress Narrative**” link, see figure 3.7-2. This will open the Progress Narrative form.

Figure 3.7-2: Center Information Page, Link to Progress Narrative

**Hollings Manufacturing Extension Partnership**  
Source for Centers

**NIST**  
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**Alabama Technology Network (165)**  
**Progress Narratives List**

[Compose Progress Narrative](#)

CIMS ID	Reporting Period	Status	Last Updated
2162	2008 Q4 (10/01/2008 - 12/31/2008)	Final	02/09/2009 by Dana Stone
2099	2008 Q3 (07/01/2008 - 09/30/2008)	Final	11/10/2008 by Dana Stone
2044	2008 Q2 (04/01/2008 - 06/30/2008)	Final	08/12/2008 by Dana Stone
1986	2008 Q1 (01/01/2008 - 03/31/2008)	Final	05/23/2008 by Dana Stone
1922	2007 Q4 (10/01/2007 - 12/31/2007)	Final	12/27/2007 by Dana Stone
1864	2007 Q3 (07/01/2007 - 09/30/2007)	Final	09/26/2007 by Dana Stone
1803	2007 Q2 (04/01/2007 - 06/30/2007)	Final	06/27/2007 by Dana Stone
		Final	08/03/2006 by Dana Stone
		Final	05/10/2006 by Dana Stone
		Final	02/13/2006 by Joe Giannamore
		Final	12/07/2005 by Joe Giannamore
1327	2005 Q2 (04/01/2005 - 06/30/2005)	Final	09/26/2005 by Joe Giannamore
1262	2005 Q1 (01/01/2005 - 03/31/2005)	Final	05/06/2005 by Dana Stone
1201	2004 Q4 (10/01/2004 - 12/31/2004)	Final	02/02/2005 by Dana Stone
1151	2004 Q3 (07/01/2004 - 09/30/2004)	Final	11/05/2004 by Dana Stone
1094	2004 Q2 (04/01/2004 - 06/30/2004)	Final	08/17/2004 by Dana Stone
1034	2004 Q1 (01/01/2004 - 03/31/2004)	Final	05/05/2004 by Kim Hamrick
973	2003 Q4 (10/01/2003 - 12/31/2003)	Final	02/04/2004 by Dana Stone
865	2003 Q3 (07/01/2003 - 09/30/2003)	Final	12/27/2003 by System Administrator
872	2003 Q2 (04/01/2003 - 06/30/2003)	Final	12/27/2003 by System Administrator

**Click here to open an existing Progress Narrative. Only records with Status of In Process can be edited.**

**Click here to compose a new progress narrative.**

65.

66. The designated center personnel will enter information into predefined text fields or items may be cut and pasted from a word processing document. Figure 3.7-3 is a summary of the Progress Narrative form.

**Note:** The submission is considered to be a draft report until the “**Submit For Reporting**” button is clicked. While in draft format or “In Process”, the Center can edit the Progress Narrative form by clicking on the Progress Narrative Link then Edit Progress Narrative link.

Figure 3.7-3: Compose Progress Narrative Form

**Hollings Manufacturing Extension Partnership**  
Source for Centers

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**Alabama Technology Network (165)**  
**Compose Progress Narrative**

Progress Narrative  
Note: \* denotes that the field is required.

**Recipient Information**  
Recipient Name: Alabama Technology Network (165)  
Cooperative Agreement Number(s): 6H0006, 6H6091  
Reporting Period: 2009-1

Please note that if you copy and paste text from MS Word and other similar applications, it may contain non-standard characters. Double-click on respective text areas to quickly remove them. HTML tags are not allowed. Text paragraphs will be preserved.

**Progress To Current Operating Plan**

**Quarterly Overview**

**Growth Services**

**Technology Deployment**

**General Information**  
Center Information  
Locations  
Staff  
Contacts

**Center Management Information**  
Clients  
Projects and Events  
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**Other Links**  
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**Select year and quarter here.**

**Enter required information here.**

Click here to submit as draft.

Click here to delete all information.

Click here to submit as final.

The screenshot shows a web-based reporting interface. At the top, there are two dropdown menus labeled 'State Strategy & Partnerships' and 'Other Partnerships'. Below them is a 'Clean Non-Standard Characters' button. The main content area is titled 'Description of Classification' and includes sections for 'Progress To Current Operating Plan', 'Quarterly Overview', 'Growth Services', 'Technology Deployment', 'Supply Chain/National Accounts', 'Work Force Development Initiatives', and 'Federal Initiatives'. At the bottom of the form, there are three buttons: 'Submit', 'Delete', and 'Submit for Reporting for 2009 Q1'. A 'Record History' section is visible at the very bottom.

Click here to clean non-standard characters.

Click here to delete all information.

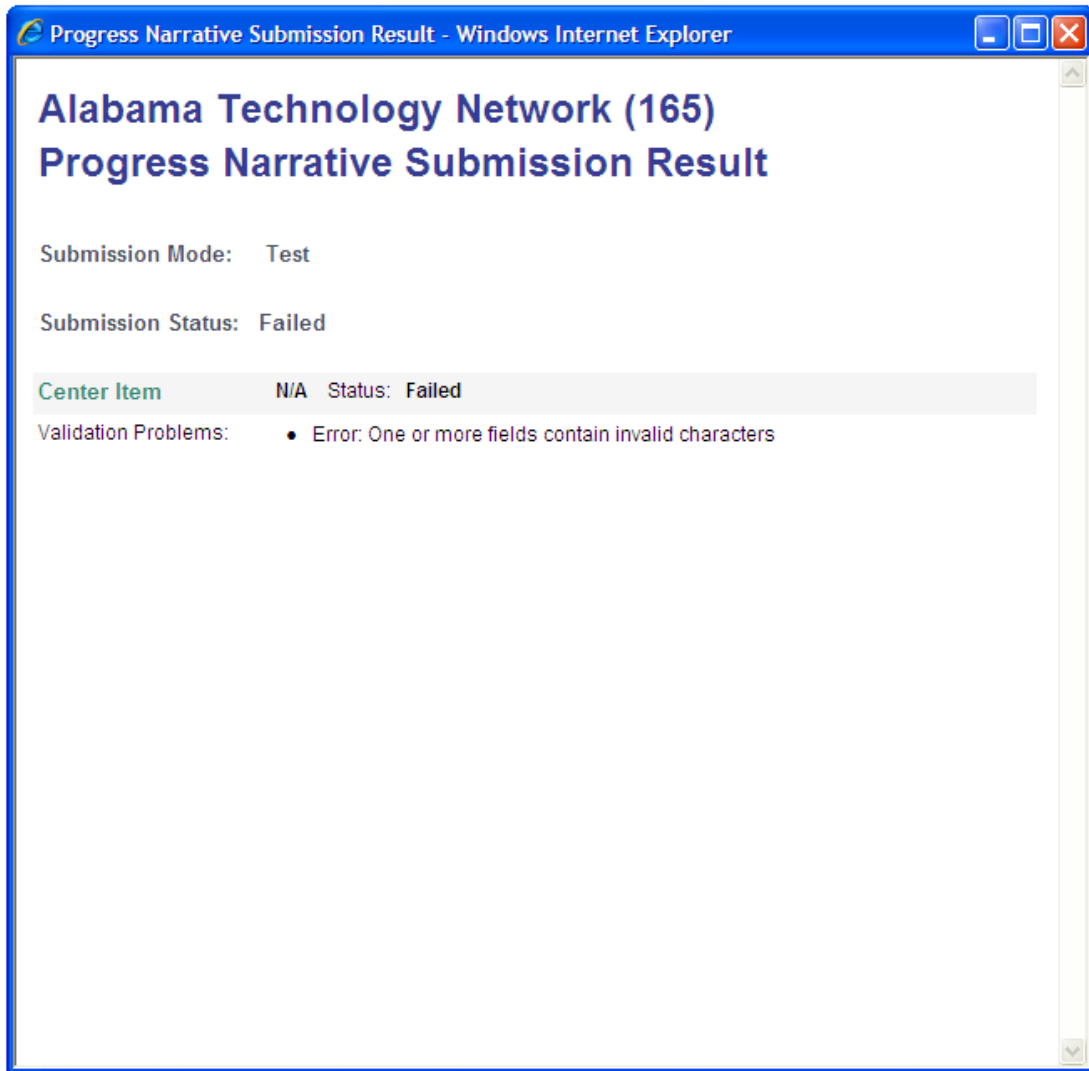
Click here to submit as final.

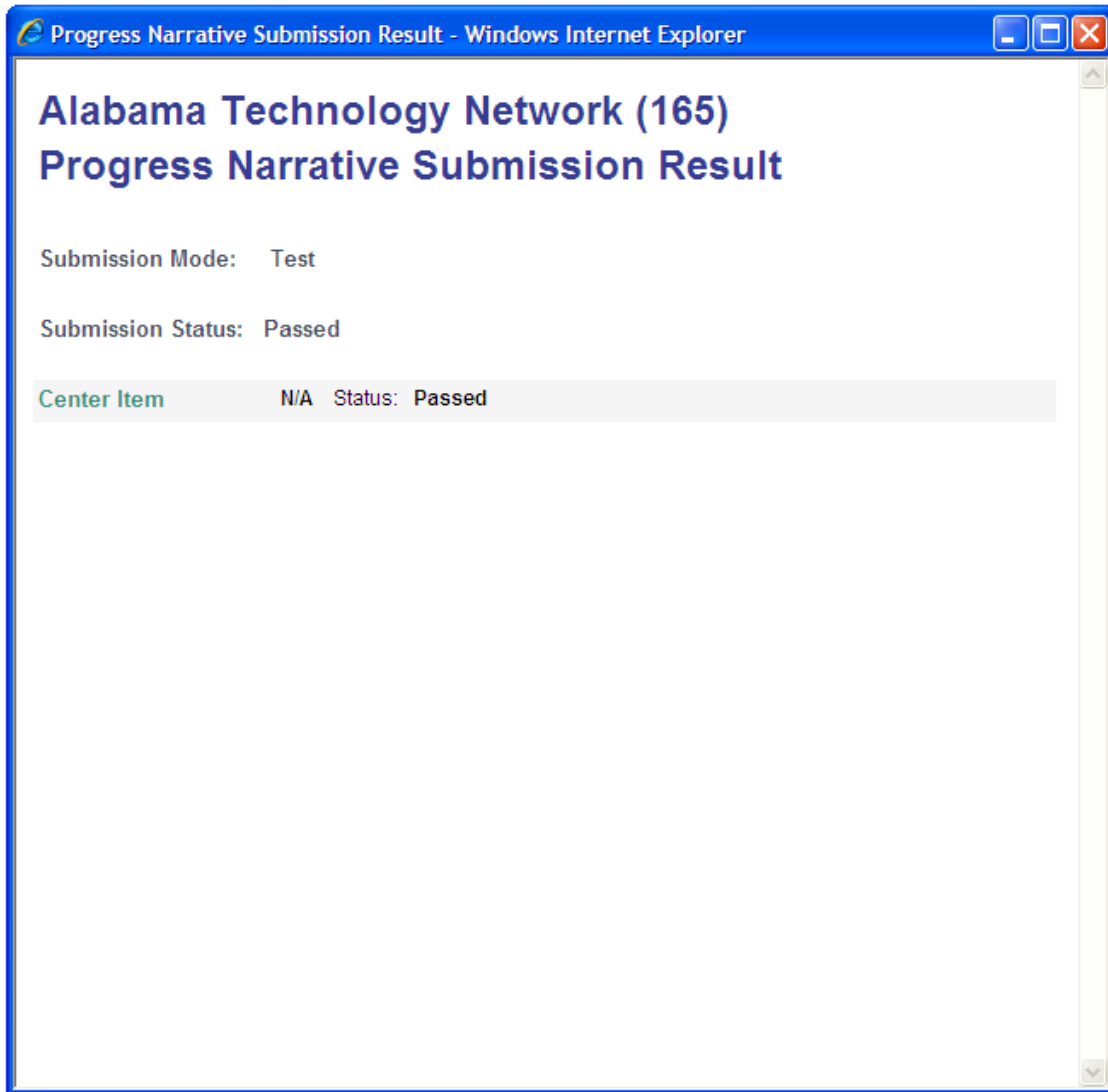
Click here to submit as draft.

Click **“Submit For Reporting”** button if the report is final and will not be edited again. Or, click the **“Submit”** button and the center may submit the file in draft format and continue entering information at a later date. Validation results will appear to indicate the acceptance or rejection of the submission. See Figure 3.7-4.

NOTE: If you receive the error message: “One or more fields contain invalid characters”, you will need to click the button “Clean Non-Standard Characters”. This button is a utility that will clear any non-ASCII characters from the text. When you cut and paste from word processing applications, many non-standard characters are embedded. In order to display the Progress Narrative report in a readable format, these characters must be removed.

Figure 3.7-4: Progress Narrative Validation Results





67. After the final report is submitted to NIST MEP and passes validation, the report may be printed by clicking on the Generate Printable Report button. There is space on the report for your Center Director's signature and date. See Figure 3.7-5.

68. Centers will print one copy of the form, the Center Director will sign and date the form, and the center staff member will send it to the NIST Grants Specialist listed in the Contacts section of the Center Information Page. Figure 3.7-4 is a summary of the printable Progress Narrative.

Figure 3.7-5: Printable Progress Narrative

**Hollings Manufacturing Extension Partnership**  
Source for Centers

**NIST**  
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## Alabama Technology Network (165)

### View Progress Narrative

[Generate Printable Report](#)

**Progress Narrative**

**Recipient Information**

Recipient Name:	Alabama Technology Network (165)
Cooperative Agreement Number(s):	6H0006, 6H6091
Reporting Period:	2009-1

Center Director Signature \_\_\_\_\_ Date \_\_\_\_\_

**Record History**

Created On/By:	
Updated On/By:	

**Click to generate the printable report for your Center Director's signature.**

NIST is an agency of the U.S. Commerce Department: [Privacy statement / security](#)

## Alabama Technology Network (165) Progress Narrative

### Progress Narrative

#### Recipient Information

Recipient Name: Alabama Technology Network (165)  
Cooperative Agreement Number(s): 6H0006, 6H6091  
Reporting Period: 2008 Q3 (07/01/2008 - 09/30/2008)

### Progress To Current Operating Plan

#### Quarterly Overview

Quarterly Overview

#### Growth Services

Growth Services

#### Technology Deployment

Technology Deployment

#### Supply Chain/National Accounts

Supply Chain

#### Work Force Development Initiatives

Work Force

#### Federal Initiatives

Federal Initiatives

#### Other Activities & Progress of Note

Progress

### State & Partnership Development and Management

#### State Strategy & Partnerships

Strategies

#### Other Partnerships

Other

---

Center Director Signature

---

Date

---

#### Record History

Created On/By: 09/30/2008 by Deirdre McMahon

Updated On/By: 09/30/2008 by Deirdre McMahon

---

*Field Descriptions for the Progress Narrative*

Table 3.7-10: Progress Narrative Field Descriptions

<b>Field Name</b>	<b>Instructions</b>	<b>Example</b>
Reporting Quarter (Required)	Year and Quarter progress occurred.	2008-3
Narrative of Progress to Current Operating Plan Goals (Required)	Briefly describe status of items in center's operating plan.	This quarter, our market penetration rose to 10% of all SMEs in our service area.
State Relations (Required)	Briefly describe any updates to State Relations.	Our 2008 state funding was passed by the legislature and signed by the Governor for \$1,000,000. The state commerce agency director is now Phil Smith. The former director resigned.

**3.7.4 Making Corrections or Changes to the Progress Narrative**

Centers are responsible for making all corrections or changes directly to the text fields. The report will remain editable until the “Submit For Reporting” button is selected. Before the report is submitted, the user will click the “Submit For Reporting” button to indicate that the report is final and will not be edited again. If corrections are needed after the “Submit For Reporting” button is selected, the Center Director or Center Reporting Contact must request the change by sending an e-mail message to the MEP Quarterly Reporting Contact. Refer to the MEP Contacts, section 5, Appendix A for the appropriate contact name and address.



## Partners

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The Partners submission provides the center a readily available mechanism for reporting on its formal relationships with other organizations.

A Partner is defined as an organization that contributes or aligns resources (human and /or monetary) through a long-term formal agreement. There are various ways a partner may help the center such as: provide cash or in-kind contributions to meet cost share, deliver services to clients, provide office space and equipment, and/or provide staff time to perform MEP type activities for the center.

The importance of knowing a Center's Partners is to show the extent of a center's reach beyond its own resources. This information is used to show that MEP centers are working with partner organizations to deliver the best possible services and products to its clients through formal contractual agreements.

### *3.8.1 Requirements for Partners*

---

The Partners information is required by the terms and conditions of the Center's Cooperative Agreement. Center personnel will review and update their Partners information at least once per quarter.

### *3.8.2 Procedures for Submitting Partners*

---

The following procedures will provide step-by-step instructions for centers to add new Partners, review the list of Partners, and delete Partners each quarter.

#### *Procedure for Submitting New Partners and Reviewing Existing Partners*

The center staff member submitting new partners or reviewing existing partners must be assigned the Center Reporting role before they may submit data to NIST MEP. See section 2.4 of this document for instructions on how to assign roles.

The following procedures will guide center staff members through the process of submitting and reviewing information about partners.

Centers will enter information about Partners into predefined text fields by doing the following:

Center personnel (assigned the Center Reporting role) will log into the MEP Source for Centers site and navigate to the Center Information Page.

69. From the Center Information Page select the **Partners** link as shown in Figure 3.8-1.

Figure 3.8-27: Center Information Page, Partners Link

The screenshot shows the website header for the Hollings Manufacturing Extension Partnership, a source for centers, under the NIST National Institute of Standards and Technology logo. A navigation menu includes Home, CIP, Communities, Knowledge, Skills, Successes, Conferences, Polls, My Account, and Logout. The main content area is titled 'Alabama Technology Network (165) Center Information'. It features a 'General Information' section with links for Center Information, Locations, Contacts, and Staff. A 'Center Management Information' section contains links for Clients, Partners, Projects and Events, Affiliates, Progress Data, Board of Directors, Operating Plan, Reports, Progress Narrative, Success Stories, State Funding Partner, and Documents. An 'Other Links' section includes Quarterly Reporting Status, Manage Role Access, and Survey Confirmation. A red callout box with the text 'Click here.' points to the 'Partners' link in the Center Management Information section.

70. Your center's list of Partners will display. Click on link **Compose New Partner** to create a new Partner record or click on the partner's name to review and/or edit the partner's data as shown in Figure 3.8-2. By default all new partners are marked as active.
71. See Figure 3.8-3 for a sample of the new partner form. Enter the required information into the form and click on Submit to save the information. Future editing may be done at anytime.

72.

Figure 3.8-28: Partners, Compose New Partner Link

The screenshot displays the 'Partners' management page of the Hollings Manufacturing Extension Partnership. The page header includes the logo and name of the partnership, along with the NIST logo and the text 'National Institute of Standards and Technology'. A navigation menu at the top lists various sections: Home, CIP, Communities, Knowledge, Skills, Successes, Conferences, Polls, My Account, and Logout.

The main content area is titled 'Alabama Technology Partners' and is divided into 'Inactive Partners' and 'Partners'. The 'Partners' section shows a table with columns for 'CIMS ID', 'Partners', and 'Remove'. A single partner entry is visible with CIMS ID 1767 and the name 'A State Economic Development Agency'. A checkbox is present in the 'Remove' column for this entry.

Callout boxes provide instructions for various actions:

- Click here to view/edit inactive partners.** (Points to the 'Inactive Partners' link)
- Click here to add a new partner.** (Points to the 'Compose New Partner' link)
- Click this checkbox to mark the partner as inactive.** (Points to the checkbox in the 'Remove' column)
- Click submit to save the new record. Click reset to reset all fields.** (Points to the 'Submit' and 'Reset' buttons)
- After reviewing partners, click "Submit for Reporting" to update the quarterly reporting status.** (Points to the 'Submit for Reporting for 2007 Q4' button)
- Click here to review or update an existing partner.** (Points to the partner entry in the table)

The footer of the page contains the text: 'NIST is an agency of the U.S. Commerce Department: Privacy statement / security notice / accessibility statement | Disclaimer | FOIA'

Figure 3.8-29: Compose New Partner Form

**Hollings Manufacturing Extension Partnership**  
Source for Centers

**NIST**  
National Institute of Standards and Technology

Home CIP Communities Knowledge Skills Successes Conferences Polls My Account Logout

**General Information**  
Center Information  
Locations  
Staff  
Contacts

**Center Management Information**  
Clients  
Projects and Events  
Progress Data  
Operating Plan  
Progress Narrative  
Partners  
Affiliates  
Board of Directors  
Reports  
Success Stories  
Documents  
State Funding Partner

**Other Links**  
Quarterly Reporting Status  
Manage Role Access  
Survey Confirmation

## Alabama Technology Network (165) Compose Partner

**Partner**

Note: \* denotes that the field is required.

Name: \*

Status: Active

Type: \* Association

Address 1: \*

Address 2:

City: \*

State: \* - Choose -

ZIP: \*

This partner's address is a service delivery location.

Competencies:

**Partner Services**

Delivers Services on Centers Behalf:

Helps Sell Center Services:

Helps Market Center Services:

Helps Center Develop Products:

Helps Train Center Personnel:

Is A Major Source of Referrals:

Provides Market Information/Analysis:

Provides Administrative or Accounting Support:

Provides Office Space:

Bills Clients for Work Performed With The Center:

**Record History**  
Created On/By:

**Check this box to add the partner's address to the locations list.**

**Click submit to save the new record. Click reset to reset all fields**

**3.8.3 Field Descriptions**

Table 3.8-11: Partners Field Descriptions

Field Name	Instructions	Example
Name (Required)	Enter Partner's organizations name.	West Virginia University
Type (Required)	Choose one organization type from pull-down list. Valid entries: <ul style="list-style-type: none"> <li>• Chamber of Commerce</li> <li>• Economic Development Organizations - A branch of a state or local government agency or independent non-profit organizations whose primary purpose is to increase economic opportunity for business.</li> <li>• Federal Agency</li> <li>• Small Business Development Center (SBDC)</li> <li>• University 4-year College</li> <li>• Community and Technical Colleges</li> <li>• Local Government</li> <li>• State Government Agency</li> <li>• For-profit Consulting</li> <li>• Science and Technology Organization</li> <li>• Other non-profit</li> <li>• Association</li> <li>• Power Utility</li> <li>• Other – use only if the organization does not fit any other characterization.</li> </ul>	<ul style="list-style-type: none"> <li>• Gaithersburg Chamber of Commerce</li> <li>• Bedford County Office of Economic Development</li> <li>• National Institute of Health</li> <li>• South Carolina Small Business Development Center</li> <li>• University of Maryland</li> <li>• Frederick Community College</li> <li>• Montgomery Area Technical College</li> <li>• Montgomery County Government</li> <li>• Maryland Department of Business and Economic Development</li> <li>• Accenture</li> <li>• Oklahoma Center for the Advancement of Science &amp; Technology</li> <li>• National Science Foundation</li> <li>• Ohio Manufacturers Association</li> <li>• Georgia Power</li> </ul>
Address Line 1 (Required)	Enter the street address of the Partner's organization.	100 Bureau Drive
Address Line 2 (Required)	Enter the street address of the Partner's organization.	Stop 4800
City (Required)	Enter name of city where Partner organization is located.	Gaithersburg
State (Required)	Choose name of state where Partner organization is located (from drop-down-menu).	Maryland (MD)
Zip Code (Required)	Enter zip code where Partner organization is located.	20899-4800
Service Delivery Location	Check if the Partner's address as entered is a service delivery location for the center. By checking this box, a separate center location does not need to be created as a location in section 3.11.	checked/unchecked
Competencies	Enter the special competencies of the Partner.	Experts in the textile industry.
Delivers Services On Centers Behalf	Check if Partner delivers services on Center's behalf.	checked/unchecked
Helps Sell Center Services	Check if Partner helps sell Center Services.	checked/unchecked
Helps Market Center Services	Check if Partner helps market Center Services.	checked/unchecked
Helps Center Develop Products	Check if Partner helps Center develop products.	checked/unchecked
Helps Train Center Personnel	Check if Partner helps train Center personnel.	checked/unchecked
Is A Major Source Of Referrals	Check if Partner is a major source of referrals.	checked/unchecked
Provides Market Information/Analysis	Check if Partner provides market analysis to the center.	checked/unchecked
Provides Administrative Or Accounting Support	Check if Partner provides administrative support to the center.	checked/unchecked

<b>Field Name</b>	<b>Instructions</b>	<b>Example</b>
Provides Office Space	Check if Partner provides office space.	checked/unchecked
Bills Clients For Work Performed With The Center	Check if Partner bills clients for work performed with the Center.	checked/unchecked

## 1.1 Affiliates

---

The Affiliates submission provides the center a readily available mechanism for reporting on its informal relationships with other organizations.

An affiliate is an organization that has an informal relationship with the center and acts as a resource to the center. An informal relationship may be a reliance on the affiliate for occasional referrals or a resource the center draws on for specific topics. It is not formalized to the extent of a partnership because there is no formal contract between the organization and the center. The affiliation is not vital to the center's everyday operations. Do not report partners again as affiliates.

The importance of knowing a center's affiliates is to show the extent of a center's reach beyond its partners. This information is used to show that MEP centers are working with many different organizations to deliver the best possible services and products to its manufacturers beyond formal contractual agreements.

### 1.1.1 Requirements for Affiliates

The center's affiliate information is required by the terms and conditions of the center's cooperative agreement. Center personnel will review and update their center affiliates' information at least once per quarter.

### 1.1.2 Procedures

The center staff member submitting affiliates must be assigned the center reporting role before they may submit data to NIST MEP. See section 2.4 of this document for instructions on how to assign roles.

The following procedures will provide step-by-step instructions for centers to add new affiliate entries, review the list of affiliates, and delete affiliates each quarter.

#### **Procedure for Submitting the New Affiliates**

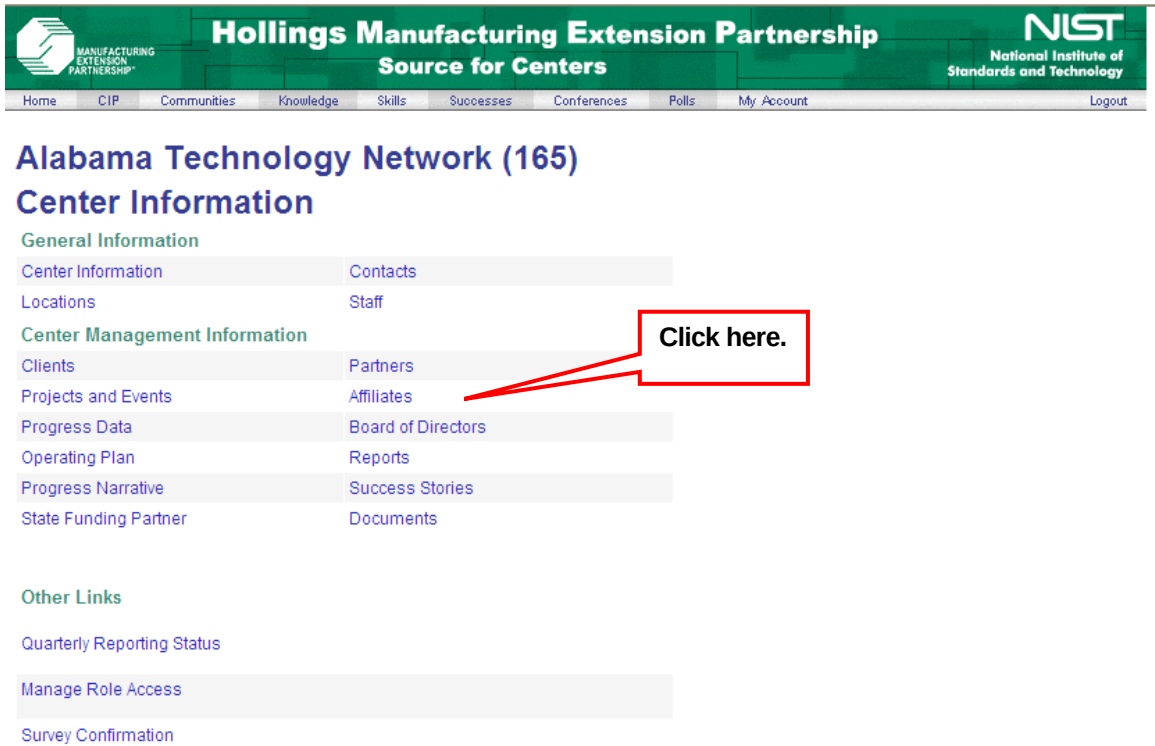
The following procedures will guide center staff members through the process of submitting information about their new affiliates.

Centers will enter information about affiliates into predefined text fields by doing the following:

Center personnel (assigned the Center Reporting role) will log into the MEP Source for Centers site and navigate to the Center Information Page.

From the Center Information Page select the **Affiliates** link as shown in Figure 3.9-1.

Figure 3.9-30: Center Information Page, Affiliates Link



The screenshot shows the website header for the Hollings Manufacturing Extension Partnership, a source for centers, with the NIST logo. A navigation menu includes Home, CIP, Communities, Knowledge, Skills, Successes, Conferences, Polls, My Account, and Logout. The main content area is titled "Alabama Technology Network (165) Center Information". Under "General Information", there are links for Center Information, Contacts, Locations, and Staff. Under "Center Management Information", there are links for Clients, Partners, Projects and Events, Affiliates, Progress Data, Board of Directors, Operating Plan, Reports, Progress Narrative, Success Stories, and State Funding Partner Documents. A red box highlights the "Affiliates" link with a callout that says "Click here.". Under "Other Links", there are links for Quarterly Reporting Status, Manage Role Access, and Survey Confirmation.



73. Your center's list of **Affiliates** will display. Click on the link **Compose New Affiliate** to create a new Affiliate record as shown in Figure 3.9-2. By default all new affiliates are created with a status of active.
74. Using definitions of an Affiliate as a reference, the designated center personnel will enter information into predefined text fields as shown in Figure 3.9-3.
75. Click on the **Submit** button to save the information. Future editing may be done at any time.
76. Figure 3.9-2 below also describes how to edit an existing affiliate and how to remove an inactive affiliate.

Figure 3.9-31: Affiliates, Compose New Affiliate Link, Review Existing Affiliate Link, Remove Affiliate Link, Submit for Reporting Link

**Hollings Manufacturing Extension Partnership**  
Source for Centers

NIST  
National Institute of Standards and Technology

Home CIP Communities Knowledge Skills Successes Conferences Polls My Account Logout

**ABC Center (223) Affiliates**

General Information  
Center Information  
Locations

Inactive Affiliates

CIMS ID 5564

Affiliates  
SME Trade Association

Remove

Submit for Reporting for 2007 Q4

Compose New Affiliate

Click here to add a new affiliate.

Click here to review/edit inactive affiliates.

Click here to review or edit an existing affiliate.

Click here to mark inactive.

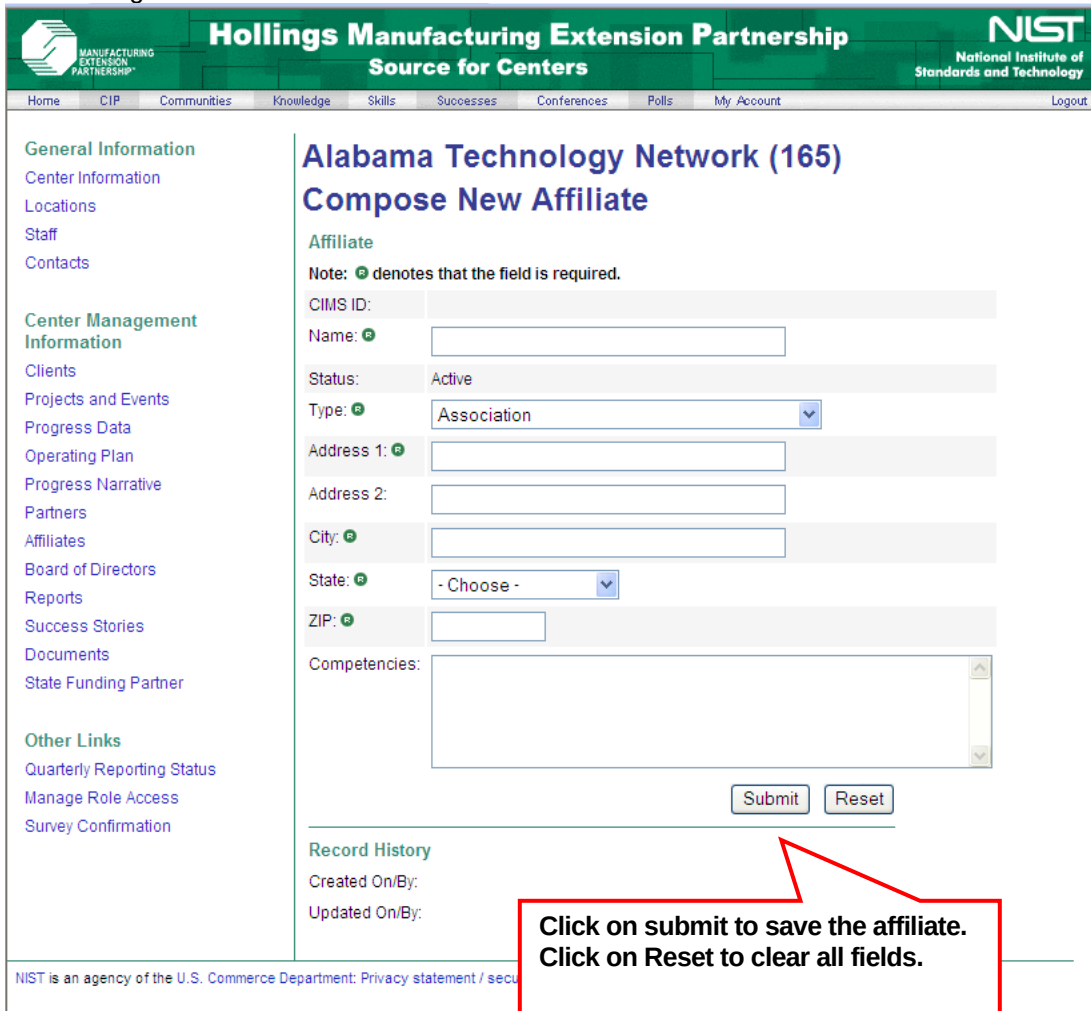
After reviewing affiliates, click here to update your quarterly reporting status.

Operating Plan  
Progress Narrative  
Partners  
Affiliates  
Board of Directors  
Reports  
Success Stories  
Documents  
State Funding Partner

Other Links  
Quarterly Reporting Status  
Manage Role Access  
Survey Confirmation

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Figure 3.9-3: New Affiliate Form



**Hollings Manufacturing Extension Partnership**  
Source for Centers

NIST  
National Institute of Standards and Technology

Home CIP Communities Knowledge Skills Successes Conferences Polls My Account Logout

**Alabama Technology Network (165)**  
**Compose New Affiliate**

**Affiliate**  
Note: \* denotes that the field is required.

CIMS ID:

Name: \*

Status: Active

Type: \* Association

Address 1: \*

Address 2:

City: \*

State: \* - Choose -

ZIP: \*

Competencies:

**Record History**  
Created On/By:  
Updated On/By:

**Click on submit to save the affiliate.  
Click on Reset to clear all fields.**

NIST is an agency of the U. S. Commerce Department: Privacy statement / security

### 3.9.3 Field Descriptions

Table 3.9-12: Affiliate Field Descriptions

Field Name	Instructions	Example
Name (Required)	Enter Affiliate's organization name.	West Virginia University
Organization Type (Required)	Choose one organization type from pull-down list. Valid entries: <ul style="list-style-type: none"> <li>• Chamber of Commerce</li> <li>• Economic Development Organizations - A branch of a state or local government agency or independent non-profit organizations whose primary purpose is to increase economic opportunity for business.</li> <li>• Federal Institute</li> <li>• Small Business Development Center (SBDC)</li> <li>• University 4-year College</li> <li>• Community College</li> <li>• Technical College</li> <li>• Local Government</li> <li>• State Government Agency</li> <li>• For-profit Consulting</li> <li>• Science and Technology Organization</li> <li>• Other non-profit</li> <li>• Association</li> <li>• Power Utility</li> <li>• Other – use only if the organization does not fit any other characterization.</li> </ul>	<ul style="list-style-type: none"> <li>• Gaithersburg Chamber of Commerce</li> <li>• Bedford County Office of Economic Development</li> <li>• National Institute of Health</li> <li>• South Carolina Small Business Development Center</li> <li>• University of Maryland</li> <li>• Frederick Community College</li> <li>• Montgomery Area Technical College</li> <li>• Montgomery County Government</li> <li>• Maryland Department of Business and Economic Development</li> <li>• Accenture</li> <li>• Oklahoma Center for the Advancement of Science &amp; Technology</li> <li>• National Science Foundation</li> <li>• Ohio Manufacturers Association</li> <li>• Georgia Power</li> </ul>
Address Line 1 (Required)	Enter the street address of the Affiliate organization.	100 Bureau Drive
Address Line 2 (Required)	Enter the street address of the Affiliate organization.	Stop 4800
City (Required)	Enter name of city where Affiliate organization is located.	Gaithersburg
State (Required)	Choose name of state where Affiliate organization is located (from drop-down-menu).	Maryland (MD)
Zip Code (Required)	Enter zip code where Affiliate organization is located.	20899-4800
Competencies	Enter the special competencies of the Affiliate.	Provide Information Technology expertise.

## Client Impact Survey

Since 1996, NIST MEP has sponsored a nationwide survey of clients of the manufacturing extension centers it funds. The survey asks clients to comment on the impact on their business as a result of the services provided by their local center. NIST MEP sponsors an impact survey of manufacturing extension center clients for two purposes:

77. To collect national aggregate information on program performance and impact for national stakeholders. The survey provides information about the quantifiable impact on client firms of the services provided by MEP centers. The survey results provide the impact data used to satisfy the Government Performance and Results Act (GPRA) requirements of the federal government.
78. To provide center specific impact information. Centers use this information to communicate results to their stakeholders, both at the state and federal level. Center managers and NIST MEP use the results to evaluate center effectiveness. The MEP Center Review Criteria and review process place a strong emphasis on a center's ability to demonstrate impacts. NIST MEP will be using the Minimally Acceptable Impact Measures (MAIM) to evaluate center performance and the various process steps associated with this evaluation. This policy went into effect March 31, 2003. Survey results currently being collected will be used in the four-quarter rolling average computations.

## The Survey Process

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### *The Survey House*

The survey contractor, Turner Marketing, was awarded the contract to conduct the survey in a competitive bidding process. They are highly experienced in conducting surveys of business establishments and bring modern survey related technology to this survey.

### *4.1.2 Overview of the Survey Methodology*

The survey is client based and asks respondents to consider the entire set of services a center has provided through projects and to comment on how their business performance has been affected in the past 12 months as a result of these projects. This survey approach was designed to be easy for the client and also to be aligned with NIST MEP's strategic emphasis on long-term relationships designed to truly transform client firms.

Surveys are conducted with each client once a year. Repeat clients will be surveyed at the same time every year until a year has passed in which no further services are received, or if the client has been designated as having long-term impact projects.

The survey contractor uses one of two methods of surveying clients –computer telephone assisted interviews (CATI) or the Web. Surveys are conducted in English by default regardless of the method used. The survey focuses on the many different types of impacts and changes that firms make to improve their businesses and competitiveness. It also has a series of questions designed to measure the intermediate changes in the client firm as well as those affecting the firm's overall performance.

A copy of the survey is located in Section 4.4.

### *4.1.3 Making the Survey Work for Your Center*

Centers have a great deal of control over whether the survey process works well. Taking responsibility for ensuring that each step the center's roles and responsibilities in the survey is carried out is important to ensuring a successful survey process. Centers can affect the success of the survey process in the following ways:

- Identify the best respondent;
- Take advantage of the data confirmation process by ensuring data is current and accurate;
- Brief center staff; and
- Educate the client on the survey and survey concepts.

Each of these strategies is discussed in detail below.

### *Use the CIF & PIF Wisely*

Careful and accurate reporting of clients, projects, and events is the survey's foundation and its importance to the success of the survey cannot be overstated.

Ensuring that client identifiers are assigned and reported correctly is crucial. If more than one client is assigned the same ID, only one of the clients will be surveyed. If more than one ID is assigned to a client, the client will be surveyed more than one time per year and possibly more than one time per quarter. Client identifiers should not change, but if changes are unavoidable, NIST MEP should be contacted in advance of any changes so that problems with the survey are taken care of before they arise. Once a client is assigned an identifier they should keep that identifier forever. Some rules to keep in mind:

- If a client goes out of business, the ID should be retired and not be reused;
- If a client changes its name, the ID must not change;

- If the company has multiple locations, assign different IDs to each location. The name can be the same, or to avoid confusion append the location to the name if possible. Like "XYZ Company - Smithville";
- If a company splits into two or more subsidiaries, make sure a new ID is assigned to the new subsidiaries when they split. The parent can keep the old ID;
- If a client is bought out by another client, the ID of client that was bought should be retired.

#### *Identify the Best Respondent*

Experience shows that identifying the most appropriate respondent makes a crucial difference in the success of the survey. In many cases the most appropriate respondent may not be the individual at the client firm who worked most closely with the center to implement the project. Rather, the most appropriate respondent may be someone at a higher level in the client firm who is in a better position to assess the project's impact on the firm's overall performance. Frequently, the best respondent is the CEO or company President. This is almost always the case in smaller firms, as the president may be the only individual with a true understanding of the firm's financial performance. Staff level engineers or shop floor supervisors frequently do not have enough understanding of the firm's financial picture to be able to respond effectively to the survey.

Center field staff may need to ask their primary contact at the client firm to arrange a meeting with a more senior official so that issues regarding project impacts and how a project fits into the client's overall business strategy can be discussed. Such a meeting is useful in ensuring that the project is aligned with the client's overall strategy and can also serve as a way of identifying future projects with the client. It also provides an opportunity to ask the more senior official to participate in the survey.

Most clients appreciate the fact that MEP centers are asked to demonstrate the impact they have on client firms. It is entirely appropriate for field staff to ask their primary contact at the client firm to provide guidance in identifying the best potential survey respondent. The primary contact can also help make sure the identified respondent is fully aware of the work done by the center, its possible impacts, and the upcoming survey.

#### **Note**

In cases where there is more than one individual at the client firm aware of the impacts of the entire series of Projects and Events conducted with the center, **centers should provide one, and only one, most qualified person to be contacted for the interview.**

All efforts possible should be made to identify appropriate secondary respondents who can respond to the survey if the primary contact is unavailable.

is an opportunity to update information needed to conduct the survey and ensure that the materials sent to the client appear as professional as possible. The survey uses both current and historic project information. Thus, it is important that the complete project list that will be seen by each client be reviewed carefully. Project descriptions submitted on a CIF & PIF in the past may never have been intended to be viewed by the client. And, client contacts change. Most centers will want to involve their field staff in the review process since it is the field staff that are most aware of changes in the client firm, and will be knowledgeable about what project titles will serve as effective reminders for the client.

#### *Brief Center Staff*

If all appropriate center staff are aware of the survey and their role in it, they can be allies and teammates in ensuring that the survey works well. Centers that shield field staff from having to deal with the survey usually find that they do themselves a disservice. Centers that fully brief their field staff on survey issues have historically had much better experiences with the survey.

Once briefed, field staff can do a much better job in gaining client agreement to participate in the survey. They also provide helpful data for the CIF & PIF. Center Directors, Field Staff, Legislative Liaisons, Marketing Managers, and other center staff should be familiar with the survey and the survey process. Table 4.1-1 lists briefing points for Center Directors and other senior managers, Field Staff, and Marketing Managers and Legislative Liaisons.

Table 4.1-1: Briefing Points

<b>Briefing Points for Center Directors and Other Senior Managers</b>
Overview of the survey process.
Familiarization with the type of data to be returned on the survey summary report and MAIM.
General familiarity with the survey schedule..
Understanding that letters with pre-survey notification packages will be sent to clients on center stationery with signature of center official.
Understanding that email pre-survey notifications will be sent from a designated email address from the survey vendor
Familiarization with importance of survey data in the center review process.
Understanding of the data confirmation process and the need to involve field staff in this process, with a strong understanding of firmness of the deadline.
Understanding of the need for field staff to make clients aware of survey during service delivery. Understanding that no matter what efforts are made, not all clients will be reached. Field staff can become very disappointed if their best clients miss being surveyed. Expectations need to be managed in this regard.
Awareness that the Guidebook for Communicating Impact is available.
<b>Briefing Points for Field Staff</b>
Overview of the survey process.
Familiarization with the survey questions.
Discussion of the survey timing.
Discussion of how to identify the best respondent, how and when to make them aware of the survey and gain the respondent's agreement to participate.
Understanding that the clients will receive a letter or an email announcing the survey one week in advance.
Solid understanding of the data confirmation process and the important opportunity it provides to update client contact information, along with a very strong understanding of the firmness of the deadline.
Understanding that no matter what efforts are made, not all clients will be reached. Field staff can become very disappointed if their best clients miss being surveyed. Expectations need to be managed in this regard.
Understanding that the information provided on the CIF & PIF will be used exactly as reported on the CIF & PIF and that careful proofreading and attention to detail are necessary to present the most professional image to clients.
<b>Briefing Points for Marketing Managers and Legislative Liaisons</b>
Overview of the survey process.
Familiarization with the type of data to be returned on the survey summary report and MAIM.
General familiarity with the survey schedule and availability of data.
Awareness that the Guidebook for Communicating Impact is available.

*“Prepare” the Client for Survey*

There are several ways that a center can interact with the client that can help make the survey successful, but it is important never to cross the line towards putting words in the client's mouth or compromising the integrity of the survey process. Any actions that could in any way be interpreted as pressuring a client to provide inaccurate or exaggerated responses to the survey are unacceptable and unethical, and if made public, would have disastrous consequences for the program. Clients frequently become quite attached to the field staff who provide service to them and conceivably might themselves voluntarily seek to “help out their buddy at the center” by providing an exaggerated, glowing report of the staff person's work. Centers can best serve themselves and the entire national system by stressing to their clients that the survey seeks honest feedback and that what is desired more than anything else is truthful information about the real effects of the center's work. Table 4.1-2 lists the do's and don'ts to follow when preparing center clients for survey.

Table 4.1-2: Do's and Don'ts for Preparing Center Clients for Survey

Do	Do Not
Let the client know up-front that she or he will be asked to participate in the survey. Clients are taxpayers too and are often glad to know that the center takes its mission seriously and attempts to measure whether services are successful. Centers can make sure that the client knows the survey will take less than 15 minutes and should consider trying to "close" the sale up-front by asking the client to agree to participate.	Pressure a client to report quantified impacts if the client is uncomfortable making such estimates.
Ask the client to let their receptionist or secretary know to expect the call.	Call the client immediately prior to the survey and have a long conversation regarding how the client will respond to the survey questions.
Mention the survey again at the close of the project and again requesting that the client be willing to spend a few minutes providing honest feedback when the survey interviewer calls.	Fill-out a copy of the survey or facsimiles and leaving it with the client.
Take a quantitative, cost/benefit approach to selling the services. Helping clients understand the quantifiable benefit and costs of a project is not only an important selling tool: it can be an important way to role model good business decision making. Field staff can help the client think about quick, back-of-the-envelope methods of tracking project benefits and can touch base with the client periodically during the course of service delivery to see if projected benefits are on track.	Send the client a copy of a projected benefits form filled out during service delivery immediately prior to the survey, unless specifically requested by the client.
Contacting the client during the data confirmation process to make sure that the contact person is still there and that the phone number and address have not changed. This contact should be relatively brief but can include a friendly inquiry regarding whether the project impacts are still on track and whether the clients has any other needs the center might meet with a future project.	Leave a copy of a projected benefit form with a client at the close of the project unless the client is specifically asked to re-think those figures prior to responding to the survey and only to report benefits that have actually occurred.

**NOTES:**  
Centers should stress the importance of the survey notification package. This package contains important information clients need to respond to the survey such as Web interview login name and password and deadline for completing the survey.  
Remind the client that paper copies of the survey should not be mail to you or the survey contractor.

**4.1.4 Timing of the Survey**

The survey is administered four times a year (quarterly). No client will be surveyed more than once in any twelve-month period. Clients receiving only a single project from a center will be assigned for survey during the quarter falling 2 quarters after the close of their single project. Repeat clients will be assigned for survey during the quarter falling six months after the close of their first project. Repeat clients will be surveyed every year during that same quarter until a year passes in which they have no new projects close. Clients with projects designated as long-term impact projects will continue to be surveyed in their given quarter for the number of years specified by the center during reporting. Specific examples of when a client will be surveyed are given in Table. 4.1-3.



Table 4.1-3: Examples of Survey Timing

*Six-Month Survey Schedule for New Client/New Project Only*

Example	Clients with Projects Closing During:	Will be Surveyed During:
1	Quarter 2 2008 (April 1, 2008 – June 30, 2008)	Quarter 4 2008
2	Quarter 3 2008 (July 1, 2008 – September 30, 2008)	Quarter 1 2009
3	Quarter 4 2008 (October 1, 2008 – December 31, 2008)	Quarter 2 2009
4	Quarter 1 2009 (January 1, 2009 – March 31, 2009)	Quarter 3 2009

**4.1.5 Overview of the Survey Process**

There are six steps in the survey process:

- 1) Submission of CIF and PIF records to NIST MEP;
- 2) Record selection process;
- 3) Data confirmation process;
- 4) Survey letters are generated and mailed;
- 5) Survey occurs; and
- 6) Data is returned to NIST and made available to centers.

Each step is described in detail below.

*Submission of Client Data Log and Project/Event Data Log Records*

Each center submits client information and project/event information (CIF & PIF) records quarterly. Refer to Section 4.3 and 4.4 for more information on the requirements for CIF & PIF and for instructions on how to submit the records.

*The Record Selection Process*

Each quarter NIST MEP will use the client and project information to select clients for survey. The client unique identifier will be used to identify the clients that will be surveyed as well as the associated Projects and Events that will appear on the project list. Clients and project/events are selected using the criteria shown in Figure 4.1-1.

After the clients and projects/events are selected, centers will then be able to confirm and correct the data before the survey begins. This confirmation process is discussed in the next section.

Figure 4.1-1: Record Selection Criteria

1. Start at the Survey Quarter and go back four (4) quarters to the Working Quarter.	2. From the Working Quarter, select clients that had projects closing in that quarter or the prior quarter.	3. From the Survey Quarter, exclude clients that have been surveyed in the prior three (3) quarters.	4. For the selected clients, start with the survey quarter and select the most recent eight (8) Projects and Events where the completion dates are no more than three (3) years old. These Projects and Events will be shown to the client on the project
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			list.
Calendar Quarter	Calendar Quarter	Calendar Quarter	Calendar Quarter
Q1 – 2004	Q1 – 2004	Q1 – 2004	Q1 – 2004
Q2 – 2004	Q2 – 2004	Q2 – 2004	Q2 – 2004
Q3 – 2004	Q3 – 2004	Q3 – 2004	Q3 – 2004
Q4 – 2004	Q4 – 2004	Q4 – 2004	Q4 – 2004
Q1 – 2005	Q1 – 2005	Q1 – 2005	Q1 – 2005
Q2 – 2005	Q2 – 2005	Q2 – 2005	Q2 2005
Q3 – 2005	Q3 – 2005	Q3 – 2005	Q3 – 2005
Q4 – 2005	Q4 – 2005	Q4 – 2005	Q4 2005
Q1 – 2006	Q1 – 2006	Q1 – 2006	Q1 – 2006
Q2 – 2006	Q2 – 2006	Q2 – 2006	Q2 – 2006
Q3 – 2006	Q3 – 2006	Q3 – 2006	Q3 – 2006
Q4 – 2006	Q4 – 2006	Q4 – 2006	Q4 – 2006
Q1 – 2007	Q1 – 2007	Q1 – 2007	Q1 – 2007
Q2 – 2007	Q2 – 2007	Q2 – 2007	Q2 – 2007
Q3 – 2007	Q3 – 2007	Q3 – 2007	Q3 – 2007
Q4 – 2007	Q4 – 2007	Q4 – 2007	Q4 – 2007
Q1 – 2008	Q1 – 2008	Q1 – 2008	Q1 – 2008
Q2 – 2008	Q2 – 2008	Q2 – 2008	Q2 – 2008
Q3 – 2008	Q3 – 2008	Q3 – 2008	Q3 – 2008
Q4 – 2008	Q4 – 2008	Q4 – 2008	Q4 – 2008

Working  
Quarter

Survey  
Quarter

*The Data Confirmation Process*

One month prior to the survey occurring, centers will review and confirm the information that will be shared with their clients and used in conducting the survey. Centers can use this opportunity to edit one or all of the following fields:

- Client information such as: CME Name, CME Street Address, CME City, CME State, CME Zip Code, Main Phone Number;
- Client contact information such as: CME Contact Salutation, CME Contact First Name, CME Contact Last Name, CME Contact Position, Title, Contact Phone, email address.
- Interviewer guidance may be added at this time to provide information on how to bypass receptionist, automated telephone systems, or others who may answer the telephone for the client contact person;
- Survey language to select the language that should be used to interview the client. Note: For planning and scheduling purposes, NIST MEP should be notified if a center requires that an interview be conducted in Spanish. Refer to Section 6.0 for the name of the appropriate NIST MEP survey contact.
- Activity-specific information used during the survey such as: Project/Event Title, Center Staff Person, Affiliate Party Staff Person, and Affiliate Party Organization.

Envisioning how each field of data will be used and how the fields fit together in the survey process is not easy. Some fields such as the project title, the client contact name and address are mail merged verbatim onto the written project list and letter that will be seen by the clients. Typographical errors, misspellings, inappropriate use of capitalization or informal, imprecise project titles would present an unprofessional image to the client. Centers should take advantage of the data confirmation process to ensure every piece of information that will be seen by the client presents a professional image and every piece of information that will be used by the interviewer is as accurate and detailed as possible.

In many cases, centers may want to involve field staff in reviewing the information and appropriate arrangements should be made to ensure that field staff understand the process and are able to complete it in the time allotted. Data confirmation should entail a quick phone call or email back to the client to confirm that the contact person is still there, prepare the contact for the survey, and to touch base regarding whether the client may have any other needs for center services.

The survey house has been instructed to briefly review the client records and to modify any gross errors of spelling or capitalization. NIST MEP strongly recommends that centers not rely on this cursory review, but rather centers take ownership of their own survey data by participating in the confirmation process and ensuring that all materials viewed by their clients represent the highest levels of professionalism and accuracy.

The basic confirmation process will be as follows:

- 1) Centers will be given one month immediately prior to the survey to review their information and make changes.
- 2) Center staff assigned the reporting role will receive an email message announcing that the information is ready for review on the MEP Source for Centers Web Site.
- 3) The appropriate center staff person will log into the MEP Source for Centers site and review the information as listed above.

The schedule for the confirmation process is shown in Table 4.1-4.

Table 4.1-4: Schedule for Survey Data Confirmation Process

Step	Survey Quarter 1 (January 1 – March 31)	Survey Quarter 2 (April 1 – June 30)	Survey Quarter 3 (July 1 – September 30)	Survey Quarter 4 (October 1 – December 31)
1. Confirmation period begins on:	March 1	June 1	September 1	December 1
2. Confirmation period closes on:	March 31	June 30	September 30	December 31
3. Letters are mailed to clients on:	April 8	July 8	October 8	January 8
4. Emails are sent to clients on:	April 12	July 12	October 12	January 12
4. Survey begins on:	April 17	July 17	October 17	January 17
5. Survey closes on:	May 14	August 14	November 14	February 14
6. Survey data is available from MEP on:	July 1	October 1	January 1	April 1

**THE CONFIRMATION DEADLINE IS FIRM**

Because of the nature of the survey production process, data that are not confirmed by the deadline cannot be changed later. All client records will be moved to the next stage of the survey process together, immediately after the deadline regardless of whether the center has completed the confirmation process.

***Procedures for Confirming the Survey Data***

The following procedures will provide the center with step-by-step instructions for reconfirming client and project/event data before center clients are surveyed. Centers will be given one month to complete this validation process before records are sent to the survey contractor for survey. After the confirmation period closes, there will be no allowance for the center to make further changes. See Table 4.1-4 above for actual begin and end dates for the confirmation period.

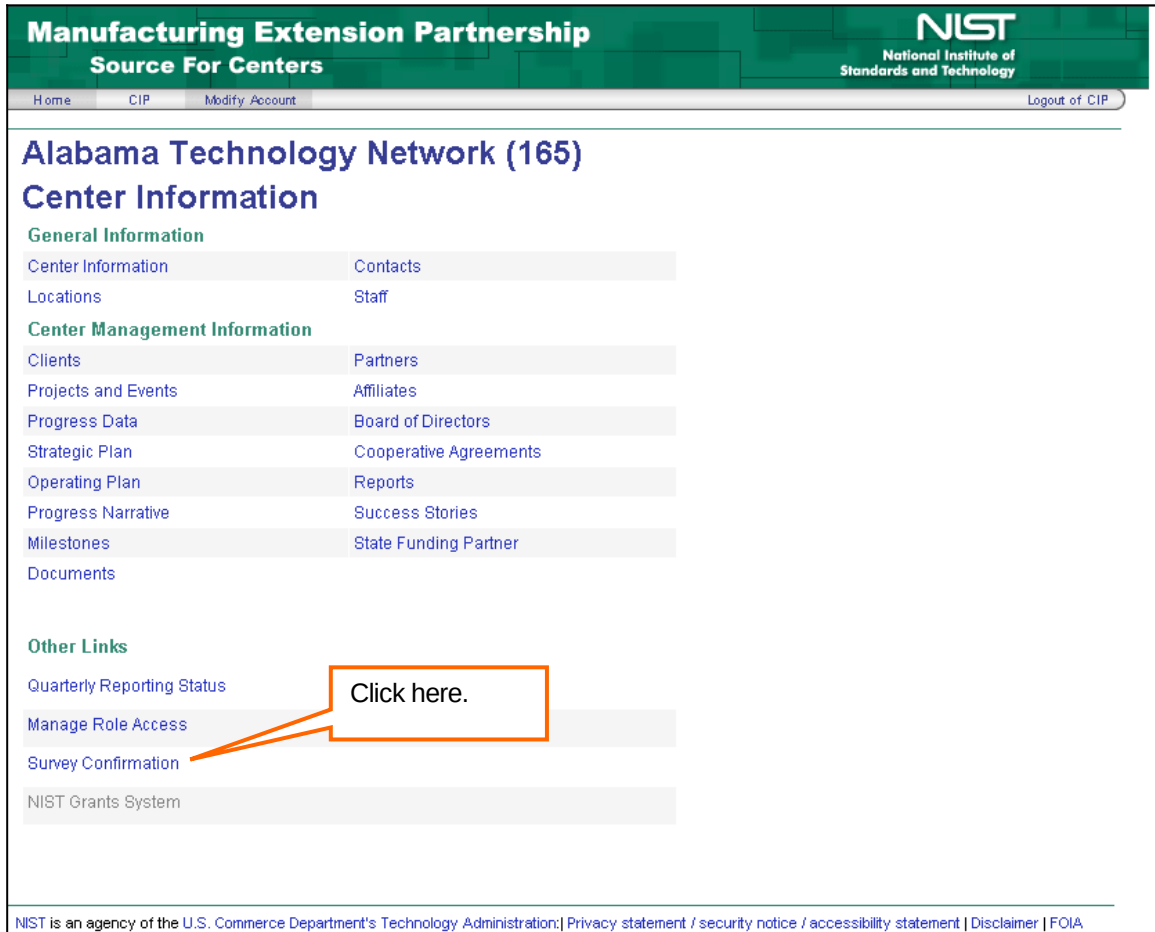
**Note**

The center staff member accessing the records for Survey Confirmation must be assigned the Center Reporting role before they may access and edit the records.  
See section 2 of this document for instructions on assigning roles.

- 1) Navigate to the Center Information page (refer to the MEP Source for Centers Web Site and Center Information Page for instructions).

- 2) From the Center Information Page, select the **Survey Confirmation** link as shown in Figure 4.1-2.

Figure 4.1-2: Center Information Page, Survey Confirmation Link



- 3) In figure 4.1-3, the status of the Survey Confirmation records are displayed. The Survey Confirmation records that have been confirmed will have a check mark under **Confirmation Status**. (As of April 1, 2008, centers no longer have the ability to exclude a client from survey. If there is an instance of a company going out of business, please contact NIST MEP survey administrators.)
- 4) **To confirm a Survey Confirmation record**, first click on the client's name to open the client's Survey Confirmation record (see figure 4.1.4 for an open Survey Confirmation record).

Figure 4.1-3: Survey Confirmation Record list screen

**Manufacturing Extension Partnership**  
**Source For Centers**

Home CIP Modify Account Logout of CIP

**General Information**  
Center Information  
Locations  
Staff  
Contacts

**Center Management Information**  
Clients  
Projects and Events  
Progress Data  
Strategic Plan  
Operating Plan  
Progress Narrative  
Partners  
Affiliates  
Board of Directors  
Cooperative Agreements  
Reports  
Success Stories  
Milestones  
Documents  
State Funding Partner

**Other Links**  
Quarterly Reporting Status  
Manage Role Access  
Survey Confirmation  
NIST Grants System

### Test Center (222) Survey Confirmation

[Generate Printable Report](#)

Code	Confirmation Status	Exclusion Status	CIMS Client ID	Client Name	Center Client ID
TT1	<input type="checkbox"/>	<input type="checkbox"/>	43728	<a href="#">Crown Western</a>	3029
TT1	<input type="checkbox"/>	<input type="checkbox"/>	43730	<a href="#">LaceTronix Inc.</a>	3031
TT1	<input type="checkbox"/>	<input type="checkbox"/>	43727	<a href="#">Smithville Manufacturing</a>	6631
TT1	<input type="checkbox"/>	<input type="checkbox"/>	43727	<a href="#">Specialties Inc</a>	8913

**Click here to generate a printed report of all clients selected for survey.**

**Click on these links to open the survey confirmation record.**

NIST is an agency of the U.S. Commerce Department's Technology Administration. | Privacy statement / security notice / accessibility statement | Disclaimer | FOIA

- 5) After selecting the on client's name, the Survey Confirmation record will open and associated client's data and Projects/Events will be shown.
- 6) Click on the link **Edit Survey Confirmation Record** to edit the data for this client.
- 7) Edit the client data and include the client for survey. A sample Survey Confirmation record in edit mode is shown in Figures 4.1-4, 4.1-5, and 4.1-6 below.
- 8) Finally, after editing all data, click on the **Submit** button to save your changes.

Figure 4.1-4: Sample Survey Confirmation Record

**Manufacturing Extension Partnership**  
**Source For Centers**

NIST  
National Institute of  
Standards and Technology

Home CIP Modify Account Logout of CIP

**General Information**  
Center Information  
Locations  
Staff  
Contacts

**Center Management Information**  
Clients  
Projects and Events  
Progress Data  
Strategic Plan  
Operating Plan  
Progress Narrative  
Partners  
Affiliates  
Board of Directors  
Cooperative Agreements  
Reports  
Success Stories  
Milestones  
Documents  
State Funding Partner

**Other Links**  
Quarterly Reporting Status  
Manage Role Access  
Survey Confirmation  
NIST Grants System

### ABC Center (223) Survey Confirmation

**Survey Confirmation**  
**Note:** \* denotes that the field is required.

This client has been verified and is correct as shown.

**Client Contact Information**

Include this client into survey  
 Exclude this client from this quarter survey  
 Exclude this client from this quarter and all future surveys

Primary Contact Salutation: \*

Primary Contact First Name: \*

Primary Contact Last Name: \*

Primary Contact Title: \*

Client Name: \*

Address1: \*

Address2:

City: \*

State: \*

Zip: \*

Primary Contact Phone: \*  Ext.:

Primary Contact Fax:

Primary Contact E-mail Address:

Figure 4.1-5 Sample Survey Confirmation Record (Continued)

**Edit additional client contact information**

**Click here to change end markets.**

#### *Survey Notification Package Generated and Mailed/Emailed*

One-week prior to survey, clients will receive a survey notification package announcing that the survey will occur via email or mail, which the center designates during survey confirmation.

The mailed letter will be printed on center stationary and close with the signature of an appropriate center official. If the center has chosen email as the delivery method, emails will arrive to the contact from a designated email address, [mepsurvey@turnermarketing.com](mailto:mepsurvey@turnermarketing.com). Center staff should make the client contact aware of this email address in order to avoid the notification email getting caught in a SPAM filter.

During the data confirmation process, centers will submit a supply of stationery, as well as the signature of an appropriate center official. The survey contractor will contact each center's survey contact if and when a supply of stationery is needed. Centers may also submit new or revised stationery at any time. A copy of the letter is in Section 4.3.

The mailed survey notification package will contain three enclosures: a cover letter, a summary sheet, and a list of the projects the client has completed with the center. Refer to Section 4.4 for a copy of the summary sheet and sample list of projects.

The emailed survey letter will be a simple email with a link to the survey and the necessary login information. A copy of the email is in Section 4.3.

A reminder letter is sent out to all clients during the first week of surveying. The survey contractor can fax, email or re-mail a notification letter to clients if the original is misplaced or lost. Centers must request this by contacting the survey contractor. Refer to Section 6.0 for the appropriate contact at the survey contractor. The survey contractor has no authority to make changes to any survey contact information, so only clients with accurate contact information can be re-sent emails. Centers can also log in to the center portal and generate reminder emails to clients.

#### *Survey Occurs*

The surveys will occur by telephone or the web over the period described in Table 4.1-4.

Clients not reached during this period will be considered non-respondents.

The default method for surveying clients is a telephone call from the survey contractor if not designated as web only. All clients that have not completed by the Web will be called. Clients are given information about the other methods for completing the survey in the notification package. They have the option to choose which method they prefer. NIST MEP will not make special arrangements with centers and their clients to pre-arrange a method of conducting the survey.

#### *The Survey Call*

The survey conversation is controlled and scripted by a computer-assisted telephone interviewing (CATI) system. The system automatically brings up an eligible client record on the screen and provides the interviewer with all the relevant background information. Once the interviewer has reviewed the information, the CATI system will automatically dial the client's number.

Once the correct contact person has been reached, the interviewer reads the survey questions directly from the computer screen and enters the respondent's answers into the system. NIST MEP and the survey contractor frequently monitor interviews for quality. A reasonable number of attempts are made to contact clients without risking harassing the client. Interviewers will use the protocols in Table 4.1-5.in attempting to reach center clients.

#### *The Web Survey*

The client is able to log onto the survey contractor's Web site and respond to the survey anytime day or night. Clients need to have the survey id (password) and Web address, which are given in the cover letter contained in the survey notification package or in the notification email.

Clients may stop the Web interview at any time and resume at a later date. When the interview has been completed the record is locked and cannot be re-entered.



If a client experiences problems with the Web interview the survey contractor is available to help. Refer to section 5.0 for the appropriate contact at the survey contractor.

Table 4.1-5: Sample Interviewer Protocols

Outcome of Initial Phone Contact	Action
If we reach the designated contact	Attempt to conduct the interview
If the designated contact is busy	Attempt to make an appointment to call back at a convenient time and give Web Survey information
If we encounter voice mail	Wait a few days and attempt the interview again and give Web Survey information
If we reach a receptionist	Explain that the designated contact is expecting our call for this survey and attempt to schedule an appointment to call back at a convenient time and give Web Survey information
If the person declines to be interviewed	Wait a few days and attempt the interview again, expressing hope that this is a more convenient time
If the designated contact or secondary contact is no longer with that firm...	Identify who now has similar responsibilities and attempt to interview that person

*Data Returned to NIST*

After the survey closes, the survey house will transfer the data files with the client responses to NIST MEP.

*Survey Verification*

NIST MEP will examine the survey responses to identify survey results requiring verification, also known as outliers. All survey responses with a total quantified dollar impact amount of \$5 million or more, and/or total job impact of 250 or more, and those with a total quantified dollar impact of \$100 or less will require verification. Centers with survey responses that require follow-up will be notified by NIST MEP staff with a list of the outliers, along with the deadline for submitting verifications. Please note that the deadline is strict and any impacts that require verification that have not been verified by the deadline will be deleted (zeroed out). When submitting verifications, you must include the following:

1. Client name, and CIMS ID
2. Name of center staff person who verified the impact
3. How the impact was verified (call/email to client, compared results to center’s project close-out survey for the client, etc.)
4. If the total dollar impact is \$25 million or greater, provide a brief paragraph or two explaining how the results were achieved

*Survey Results Made Available to Centers*

Once required verifications are complete, center’s survey results data files will be available for download from their Center Information Page. Refer to Table 4.1-4 for the schedule. In addition to making the raw data files available to centers, NIST MEP will load the data files into a database for permanent storage. Output reports derived from this database will be available to centers under the security of their Center Information Page on the MEP Source for Centers Web Site. Refer to the Output Reports section of this document for more information. The following procedure provides step-by-step instructions for accessing the survey data files.

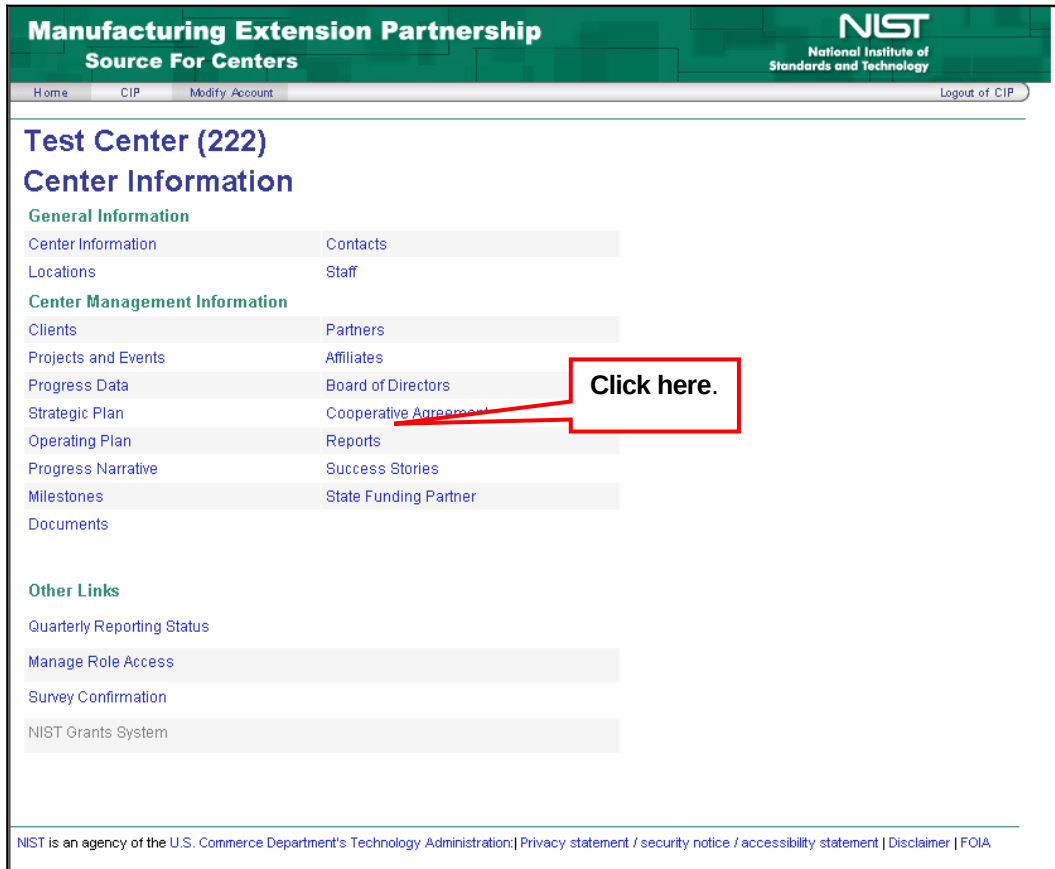
*Procedures for Downloading Survey Results*

The following procedure will provide the center with step-by-step instructions for viewing, downloading, and printing survey data. The field descriptions for these files can be found immediately following these instructions.

**Note**  
The center staff member accessing the survey results must be assigned the Center Viewer role before they may access and edit the records. See section 2 of this document for instructions on assigning roles.

- 1) Navigate to the Center Information Page (refer to the MEP Source for Centers Web Site and Center Information Page for instructions).
- 2) From the Center Information Page, select the **Reports** Link as shown in Figure 4.1-7

Figure 4.1-7: Reports Link



- 3) The report browser is displayed. Click on the report browser folders to expand the selections. Select the report you want to view from the list.
- 4) Double-click on the report icon to display the report parameters on the right side of the screen.
- 5) Next, choose report parameters.
- 6) Finally, click the **Run Report** button to generate and view the report. Figure 4.1-8 below describes the navigation.

Figure 4.1-8: Output Reports Navigation

**1) Click on folders to open the reports browser. 2) Double click on the report icon to display report parameters on the right.**

**3) Select the report parameters such as quarter and report type.**

**4) Click here to run the report. The report will be displayed in a separate window.**

**Center MAIM**

Methodology

Centers may find this to be a useful indicator as to the overall effectiveness of your center based on the MAIM indicators.

Description

The Center MAIM Report is a comprehensive report that score according to the five performance measures that line your center's

2008-3

Report Parameters

This report will use scores and min. measures specified on this form: values required are shown by default. By changing these values, you may run "what if" analysis to compute scores under different scenarios.

Indicator	Min Measure	Score
Impacted Clients per \$SM:	44	25
Bottom-line Impact Ratio:	8.2	25
Investment Leverage Ratio:	6.4	25
Percent Quantified Impact:	60%	10
Clients Served per \$M:	220	25

MAIM Score to Satisfy Requirements:

Run Report

#### 4.1.6 Field Descriptions

Information about the layout of survey files is described in Table 4.1-6 below. Note that some questions have been removed from the survey. These fields are listed at the end of this table and will be included in the survey file to facilitate requests for surveys that occurred prior to the removal of these questions.

Table 4.1-6: Field Descriptions for the Survey Output Files

Field Name	Survey Question	Data Type	Valid Responses
CIMS2 Survey ID	-	Text	NIST MEP system id for this survey.
Outcome	-	Text	<p>Successfully Completed Surveys:                      001 = completed CATI interview                      401 = completed online Web survey                      201 = completed Cantonese survey</p> <p>Non-Completed Surveys:                      002 = No answer                      003 = Busy                      004 = Answering machine                      005 = Respondent not available                      007 = Circuit problem                      008 = Hard appointment                      009 = Soft appointment                      010 = Callback to complete                      011 = Foreign language callback                      012 = Unavailable by deadline                      013 = Initial refusal                      015 = Disconnected number                      016 = Wrong number                      018 = Household number                      019 = Fax or modem                      022 = Quits                      023= General Outs                      024 = Communication difficulty                      025 = Language barrier                      047= No one knowledgeable about service                      049= Will complete via Web                      050 = Initial refusal gate keeper                      051 = Initial refusal company policy                      052 = Out of business                      054 = Referred to another location                      056 = Called ID block                      057 = Unavailable permanently                      060=Not able to comment on projects                      061=No such respondent at company (primary contact)                      062=No such respondent at company (secondary contact)                      063= Primary contact not able or willing to give referral                      064 = Does not recall working with MEP center                      065 = Primary/Secondary not responsible                      066=no phone number;                      080= Quit before qualification</p>
Date Conducted	-	Date	MM/DD/YYYY
Stealth Code	-	Text	A valid stealth code (see Section 13.0)
CIMS2 Client ID	-	Text	NIST MEP system id for this client.
Activity ID(s)	-	Text	Center assigned code that uniquely identifies the activity or projects.
CME UID	-	Text	Center assigned code that uniquely identifies the client.
Fact_Expertise	1	Text	1 = Yes, 2 = No, 8 = Don't Know/Refused
Fact_Cost	1	Text	1 = Yes, 2 = No, 8 = Don't Know/Refused
Fact_UnbAdvice	1	Text	1 = Yes, 2 = No, 8 = Don't Know/Refused
Fact_Reputation	1	Text	1 = Yes, 2 = No, 8 = Don't Know/Refused
Fact_IndKnowledge	1	Text	1 = Yes, 2 = No, 8 = Don't Know/Refused

Field Name	Survey Question	Data Type	Valid Responses
Fact_SpecSvcs	1	Text	1 = Yes, 2 = No, 8 = Don't Know/Refused
Fact_LackProviders	1	Text	1 = Yes, 2 = No, 8 = Don't Know/Refused
Fact_Don'tKnow	1	Text	1 = Yes, 2 = No, 8 = Don't Know/Refused
Fact_Other	1	Text	1 = Yes, 2 = No, 8 = Don't Know/Refused
Ext_Providers	2	Text	1 = Yes, 2 = No, 8 = Don't Know/Refused
Challenges_ProductDev	3	Text	1 = Yes, 2 = No, 8 = Don't Know/Refused
Challenges_GrowthOpp	3	Text	1 = Yes, 2 = No, 8 = Don't Know/Refused
Challenges_OngoingCostRdc	3	Text	1 = Yes, 2 = No, 8 = Don't Know/Refused
Challenges_EmployeeRec	3	Text	1 = Yes, 2 = No, 8 = Don't Know/Refused
Challenges_Financing	3	Text	1 = Yes, 2 = No, 8 = Don't Know/Refused
Challenges_Exporting	3	Text	1 = Yes, 2 = No, 8 = Don't Know/Refused
Challenges_Sustainability	3	Text	1 = Yes, 2 = No, 8 = Don't Know/Refused
Challenges_ManagingSuppliers	3	Text	1 = Yes, 2 = No, 8 = Don't Know/Refused
Challenges_Technology	3	Text	1 = Yes, 2 = No, 8 = Don't Know/Refused
Challenges_Don'tKnow	3	Text	1 = Yes, 2 = No, 8 = Don't Know/Refused
Challenges_Other	3	Text	1 = Yes, 2 = No, 8 = Don't Know/Refused
incSales	4	Text	1 = Yes, 2 = No, 8 = Don't Know/Refused
incSalesAmt	4Q	Number	Quantified Dollar Amount, Null
empCreation	5	Text	1 = Yes, 2 = No, 8 = Don't Know/Refused
empCreationAmt	5Q	Number	Quantified Amount, Null
rtnSales	6	Text	1 = Yes, 2 = No, 8 = Don't Know/Refused
rtnSalesAmt	6Q	Number	Quantified Dollar Amount, Null
empRetention	7	Text	1 = Yes, 2 = No, 8 = Don't Know/Refused
empRetentionAmt	7Q	Number	Quantified Amount, Null
costSavings	8	Text	1 = Yes, 2 = No, 8 = Don't Know/Refused
costSavingsAmt	8Q	Number	Quantified Dollar Amount, Null
plantEquipment	9A	Text	1 = Yes, 2 = No, 8 = Don't Know/Refused
plantEquipmentAmt	9AQ	Number	Quantified Dollar Amount, Null
infoSys	9B	Text	1 = Yes, 2 = No, 8 = Don't Know/Refused
infoSysAmt	9BQ	Number	Quantified Dollar Amount, Null
workforcePractices	9C	Text	1 = Yes, 2 = No, 8 = Don't Know/Refused
workforcePracticesAmt	9CQ	Number	Quantified Dollar Amount, Null
otherAreas	9D	Text	1 = Yes, 2 = No, 8 = Don't Know/Refused
otherAreasAmt	9DQ	Number	Quantified Dollar Amount, Null
Avd_Unnecessary_Invest	10	Text	1 = Yes, 2 = No, 8 = Don't Know/Refused
avdUnnecessaryInvestAmt	10Q	Number	Quantified Dollar Amount, Null
otherEffectsDesc	18N	Text	-
Suggestions (Question was reworded to ask for the single biggest business challenge. The field name is labeled Suggestions.	21	Text	-
incThroughput	OLD_2B	Text	This question has been removed from the survey. 1 = Yes, 2 = No, 8 = Don't Know, 9 = Refused

Field Name	Survey Question	Data Type	Valid Responses
impUnderstandCosts	OLD_6B	Text	This question has been removed from the survey. 1 = Yes, 2 = No, 8 = Don't Know, 9 = Refused
costSavingsGtrOne	OLD_9B	Text	This question has been removed from the survey. 1 = Yes, 2 = No, 8 = Don't Know, 9 = Refused
empReduction	OLD_10C	Text	This question has been removed from the survey. 1 = Yes, 2 = No, 8 = Don't Know, 9 = Refused
empReductionAmt	OLD_10C Q	Number	This question has been removed from the survey. Quantified Dollar Amount, Null
salesEmpHigherAmt	OLD_11Q	Number	This question has been removed from the survey. 1 = Less than 1%, 2 = 1%-2%, 3 = 3%-4%, 4 = 5%-9%, 5 = 10%-20%, 6 = More than 20%, 7 = No, 8 = Don't Know, 9 = Refused
unitLaborLower	OLD_12	Text	This question has been removed from the survey. 1 = Yes, 2 = No, 8 = Don't Know, 9 = Refused
unitLaborLowerAmt	OLD_12Q	Number	This question has been removed from the survey. 1 = Less than 1%, 2 = 1%-2%, 3 = 3%-4%, 4 = 5%-9%, 5 = 10%-20%, 6 = More than 20%, 7 = No, 8 = Don't Know, 9 = Refused

## **Sample Approach to Preparing Clients for Survey**

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\*Survey contact will give the field staff a list, on a monthly basis, of which clients will be surveyed and when letters will go out.

## **Sample Pre-Survey Notification Letter**

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A sample pre-survey notification letter is attached. This sample will provide the centers with a template letter that is general enough to be used with all clients who will be surveyed.

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## Sample Hard Copy Letter – Web and Phone

Dear Client,

Thank you once again for giving [CENTER NAME] the opportunity to lend our business and technical assistance skills to help you achieve your company's goals. So that we may continuously improve our ability to serve you and other clients in the future, we are asking that you help us gauge the success of the services we have provided to your company in the past.

Starting [survey start date], Turner Marketing, will contact you asking you to evaluate the quality and usefulness of our services and the impact our assistance has had on your business. The survey is conducted on behalf of the Manufacturing Extension Partnership, our national affiliate and funding partner. The questions are attached for your reference as well as a list of projects we have completed with you. Your participation is voluntary and your responses are held in confidence.

The survey should take about 15 minutes of your time. We know that you are busy and would like to make the survey a pleasant experience for you. Here are some suggestions:

- Make use of the attached activities and summary of questions to prepare for the interview.
- Go through the interview as soon as possible. This will avoid numerous calls from Turner Marketing interviewers trying to schedule appointments to complete the survey. Calls from Interviewers begin on [survey start date]. However, if you would like to complete the survey immediately, interviewing via web is available 24 hours a day until [survey end date].

**Your survey ID is: #####.** Please use one of the following options:

- Log onto **<https://survey.turnermarketing.com/survey>**. Use the ID referenced above for both the login and password. You may report technical difficulties with the Web site to LeAnn at Turner marketing at **877-887-6371 or 407-708-1060 x106**.
- You may call **1-877-887-6371 or 407-708-1060 x106** between 9:00 am and 9:00 pm EST to schedule a live interviewer call back either immediately or for a later date.

Your feedback is valuable to us, and your participation is greatly appreciated.

Sincerely,

Collection of your feedback is underwritten by the Manufacturing Extension Partnership at the National Institute of Standards and Technology (NIST), which provides funding for local manufacturing extension programs throughout the United States and Puerto Rico. Information is used to improve the delivery of high impact extension services to manufacturers. Completing the survey should take about fifteen minutes of your time. Your participation is voluntary and your responses are held entirely in confidence. No agency may conduct, and no person is required to respond to, an information collection that does not display a valid OMB control number. The OMB control number for this information collection is 0893-0021, exp. 10/31/2011.

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## Sample Letter – Web Only

Dear Client,

Thank you once again for giving [CENTER NAME] the opportunity to lend our business and technical assistance skills to help you achieve your company's goals. So that we may continuously improve our ability to serve you and other clients in the future, we are asking that you help us gauge the success of the services we have provided to your company in the past by completing a survey.

The survey is conducted by Turner Marketing on behalf of the Manufacturing Extension Partnership, our national affiliate and funding partner. You are asked to evaluate the quality and the usefulness of our services and the impact our assistance has had on your business. The questions are attached for your reference as well as a list of projects we have completed with you. Your participation is voluntary and your responses are held in confidence.

The survey should take about 15 minutes of your time. We know that you are busy and would like to make the survey a pleasant experience for you. Here are some suggestions:

- Make use of the attached activities and summary of questions to prepare for the interview.
- Interviewing via web is available 24 hours a day until [survey end date].

**Your survey ID is: #####.**

- Please log onto **<https://survey.turnermarketing.com/survey>**. Use the ID referenced above for both the login and password. You may report technical difficulties with the Web site to LeAnn at Turner Marketing at **877-887-6371 or 407-708-1060 x106**.

Your feedback is valuable to us, and your participation is greatly appreciated.

Sincerely,

Collection of your feedback is underwritten by the Manufacturing Extension Partnership at the National Institute of Standards and Technology (NIST), which provides funding for local manufacturing extension programs throughout the United States and Puerto Rico. Information is used to improve the delivery of high impact extension services to manufacturers. Completing the survey should take about fifteen minutes of your time. Your participation is voluntary and your responses are held entirely in confidence. No agency may conduct, and no person is required to respond to, an information collection that does not display a valid OMB control number. The OMB control number for this information collection is 0893-0021, exp. 10/31/2011.

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## Sample Letter – Email Notification

Hello,

The survey should take about 10 minutes of your time. Please use the following instructions:

1. Log onto <https://survey.turnermarketing.com/survey/>

This needs to be typed directly into the address bar and not a search engine, such as Yahoo or Google

2. Log-in with your case sensitive Survey ID: **XXXXXX** (The first 2 characters are lower case L's)

This is the first screen that you access. Enter your code and hit "Submit"

3. Use your unique 8-digit username/password: **XXXXXX**

Please use this number for both the username and password fields on this page.

- 4) Complete the survey!

**The survey ends February 14, 2008 and your participation is greatly appreciated.**

If you have any questions, please call LeAnn at 1-877turner1 x106. **Replies to this email will not be read, so please do not reply to this email.**

Your feedback is valuable to us, and your participation is greatly appreciated. Your comments provide us with important information to judge the quality and usefulness of our services.

Thanks and have a good day.

Collection of your feedback is underwritten by the Manufacturing Extension Partnership at the National Institute of Standards and Technology (NIST), which provides funding for local manufacturing extension programs throughout the United States and Puerto Rico. Information is used to improve the delivery of high impact extension services to manufacturers. Completing the survey should take about fifteen minutes of your time. Your participation is voluntary and your responses are held entirely in confidence. No agency may conduct, and no person is required to respond to, an information collection that does not display a valid OMB control number. The OMB control number for this information collection is 0893-0021, exp. 10/31/2011.

## (Appendix A) MEP Contact Information

Contact information will provide center staff members with the appropriate contact person at NIST MEP in the event that questions arise. The following table lists the person to contact for each subject area.

Table 5-13: Contact Information

Topic	Contact Information
General Site Help or feedback for the MEP Source for Centers	Send an e-mail message to <a href="mailto:webmaster@mep.nist.gov">webmaster@mep.nist.gov</a> Or call the Help Desk at 301 975-4778
Quarterly Data Submissions:	Deirdre McMahon National Institute of Standards and Technology Manufacturing Extension Partnership 100 Bureau Drive, Stop 4800 Gaithersburg, MD 20899-4800 Phone: (301) 975-8328 Fax: (301) 926-3787 E-mail: <a href="mailto:deirdre.mcmahon@nist.gov">deirdre.mcmahon@nist.gov</a>
Success Stories	Susan Hayduk National Institute of Standards and Technology Manufacturing Extension Partnership 100 Bureau Drive, Stop 4800 Gaithersburg, MD 20899-4800 Phone: (301) 975-5614 Fax: (301) 926-3787 E-mail: <a href="mailto:susan.hayduk@nist.gov">susan.hayduk@nist.gov</a>
Client Impact Survey	Chris Carbone National Institute of Standards and Technology Manufacturing Extension Partnership 100 Bureau Drive, Stop 4800 Gaithersburg, MD 20899-4800 Phone: (301) 975-2952 Fax: (301) 926-3787 E-mail: <a href="mailto:Christopher.carbone@nist.gov">Christopher.carbone@nist.gov</a>
Turner Marketing (Survey House Contact)	LeAnn Salomone Turner marketing 150 Fulton Street Sanford, Florida 32771 Phone: 407-708-1060 x106 Fax: 407-708-1070 Email: <a href="mailto:lsalomone@turnermarketing.com">lsalomone@turnermarketing.com</a>
Center Review and Analysis: <ul style="list-style-type: none"> <li>• Alternatives to Web Reporting</li> <li>• Panel Reviews</li> <li>• Cooperative Agreement Renewals</li> <li>• Annual Reviews</li> <li>• Strategic Plans</li> <li>• Operating Plans</li> <li>• Center Board Information</li> </ul>	Alex Folk National Institute of Standards and Technology Manufacturing Extension Partnership 100 Bureau Drive, Stop 4800 Gaithersburg, MD 20899-4800 Phone: (301) 975-8089 Fax: (301) 926-3787 E-mail: <a href="mailto:alex.folk@nist.gov">alex.folk@nist.gov</a>  Or  Account Manager/Federal Program Officer National Institute of Standards and Technology Manufacturing Extension Partnership 100 Bureau Drive, Stop 4800 Gaithersburg, MD 20899-4800  Refer to Center Information Pages on the MEP Source for Centers Web site for your Account Manager/Federal Program Officer's name.
Cooperative Agreement Administration:	NIST Grants Specialist

<b>Topic</b>	<b>Contact Information</b>
<ul style="list-style-type: none"><li>• Forms for Cooperative Agreements</li><li>• Status of Requests for Reimbursement</li></ul>	<p>National Institute of Standards and Technology Grants Office 100 Bureau Drive, Stop 3573 Gaithersburg, MD 20899-3573</p> <p>Refer to the Center Information Pages on the MEP Source for Centers Web site or the Special Award Conditions section of your Cooperative Agreement for the name and telephone number of your Grants Specialist.</p>

## (Appendix B) Output Reports

One important feature of the Center Information Page is the ability for centers to view and print Output Reports created by NIST MEP based on the data submitted by the Centers and from the Client Survey. These reports show the center's data in comparison to the national average of all centers. NIST MEP will use these reports in preparation for reviews and other discussions with the center. Centers may find these reports useful when preparing for a review or as a way to monitor center operations. Center Boards may find these reports useful to compare the Center's operations with national averages. Instructions on how to run and print Output Reports from the Center Information Page follow.

### Accessing Output Reports

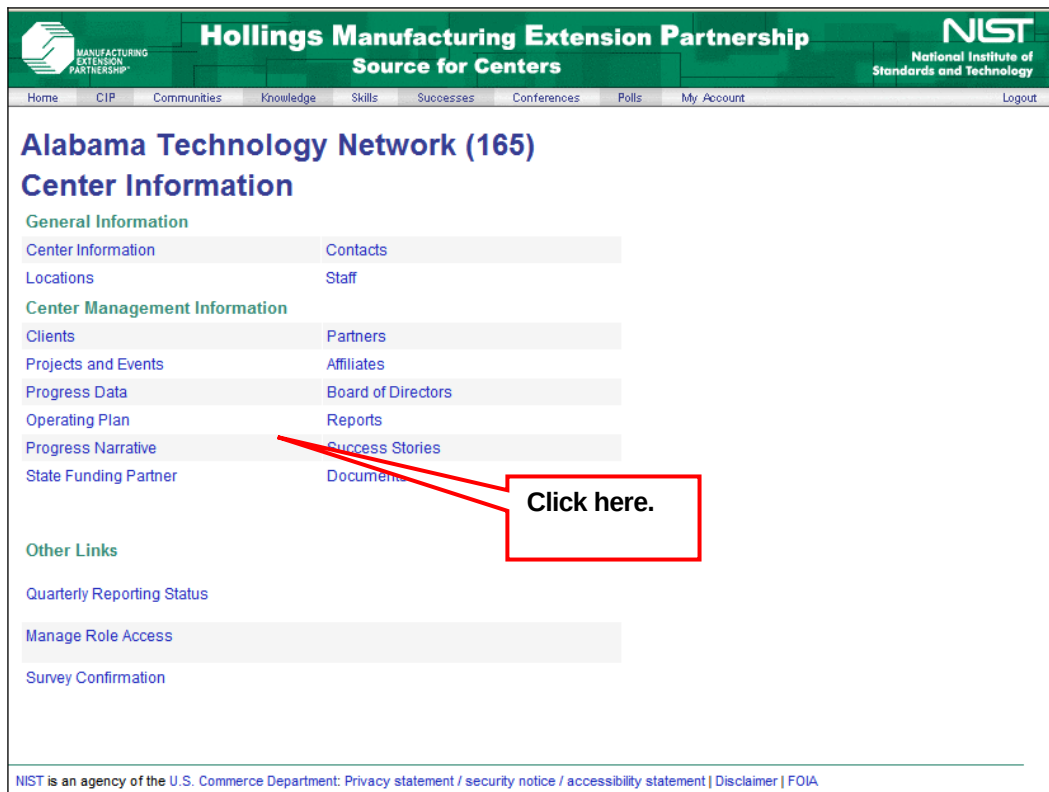
The following procedure will provide the center with step-by-step instructions on how to run, view and print Output Reports from the Center Information Page.

The center staff member(s) accessing the Output Reports must be assigned the Center Reporting Role or Center Management Role before they may access and print the reports. See section 2.4 of this document for instructions on assigning roles.

41) Center Personnel will log into the MEP Source for Centers Web Site and navigate to the Center Information Page.

42) From the Center Information Page click on the **Reports** link as shown in Figure 6.1-1.

Figure 6.1-32: Center Information Page, Reports Link



43) The Reports Screen will open displaying the Output Reports Tree View, see figure 6.1-2. Click once on the category to open the list of reports. The directory will expand displaying sub-folders.



Figure 6.1-33: Output Reports Tree



44) Expand each folder until you find the report you want to view. See figure 6.1-3.

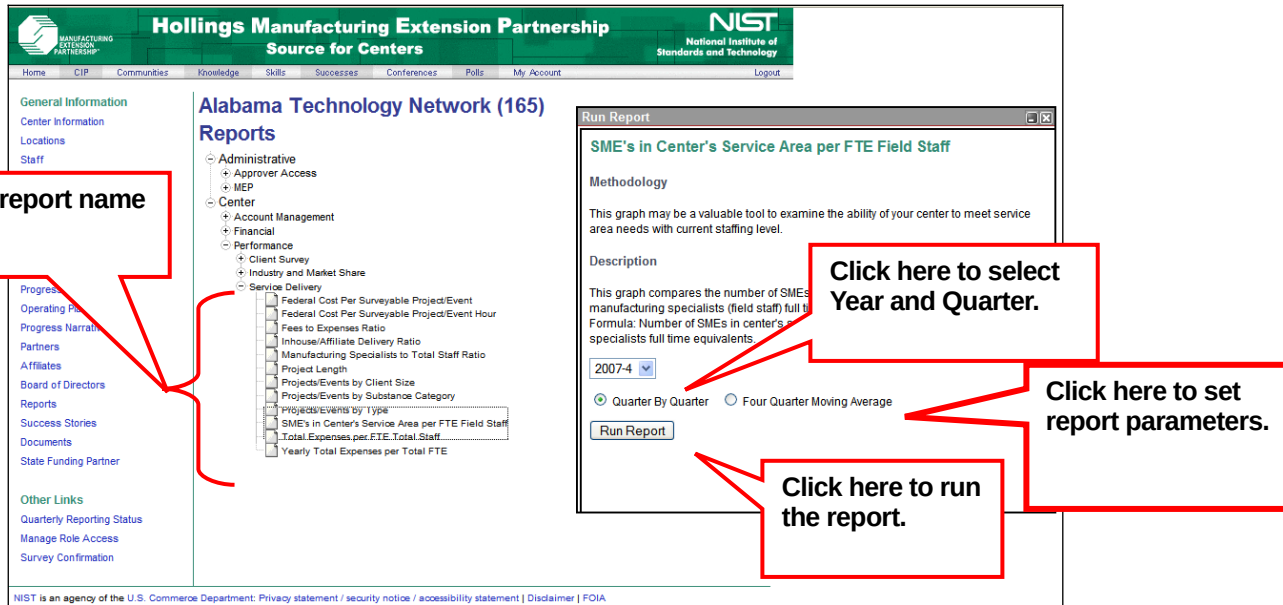
45) Next, double click on the report name to display the Output Report Parameters in a new popup window.

46) In the Output Report Parameters window, select the **Quarter** and **Report Type\***, Quarter by Quarter or Four Quarter moving average.

\*Output reports are generated in two formats: 1) Single quarter by quarter figures (Quarter by Quarter), and 2) Calculated as a four-quarter rolling figure (Four Quarter Moving Average), thus indicating evolving trends.

47) Finally, click on the **Run Report** button to run and view the report. Figure 6.1-3 below describes the navigation (the report will open in a new window).

Figure 6.1-34: Output Reports Navigation



48) The Report Results window will appear. Users may click the **View Data** link to view the data in table format. Note that not all reports will have the View Data link provided. Users may also click **Run Report with New Parameters** to run the report again. See Figures 6.1-4 , 6.1-5, and 6.1-6 below.

Figure 6.1-4: Report Results Window

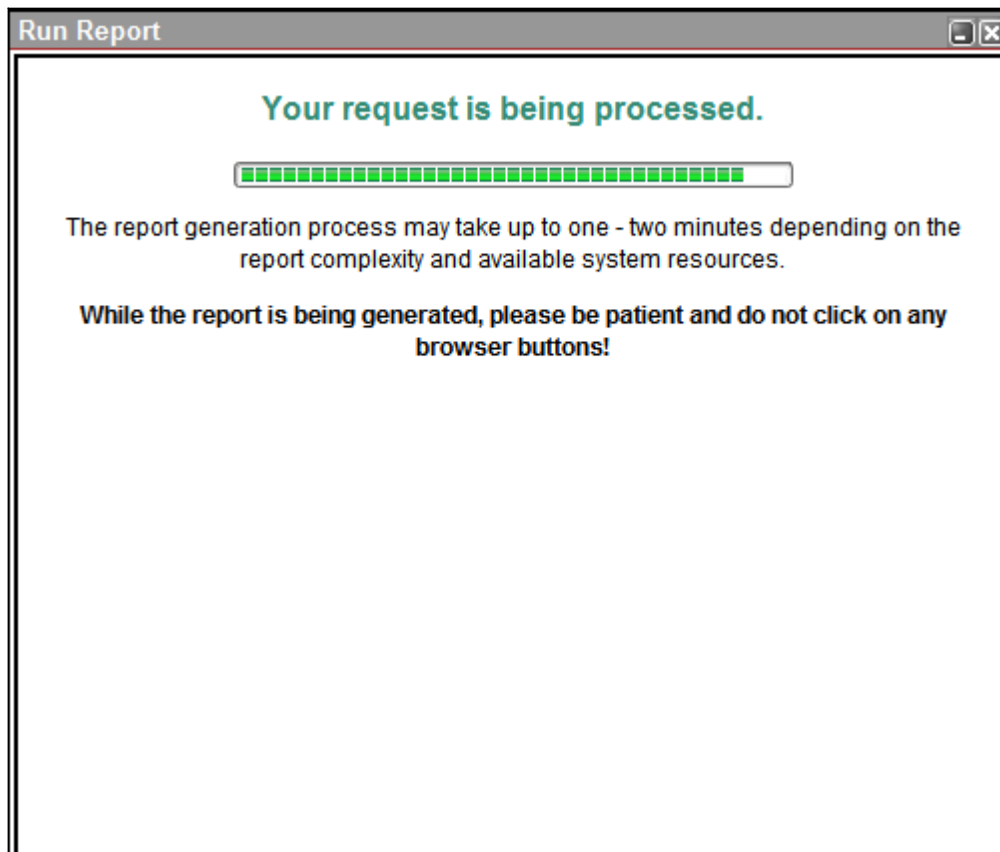
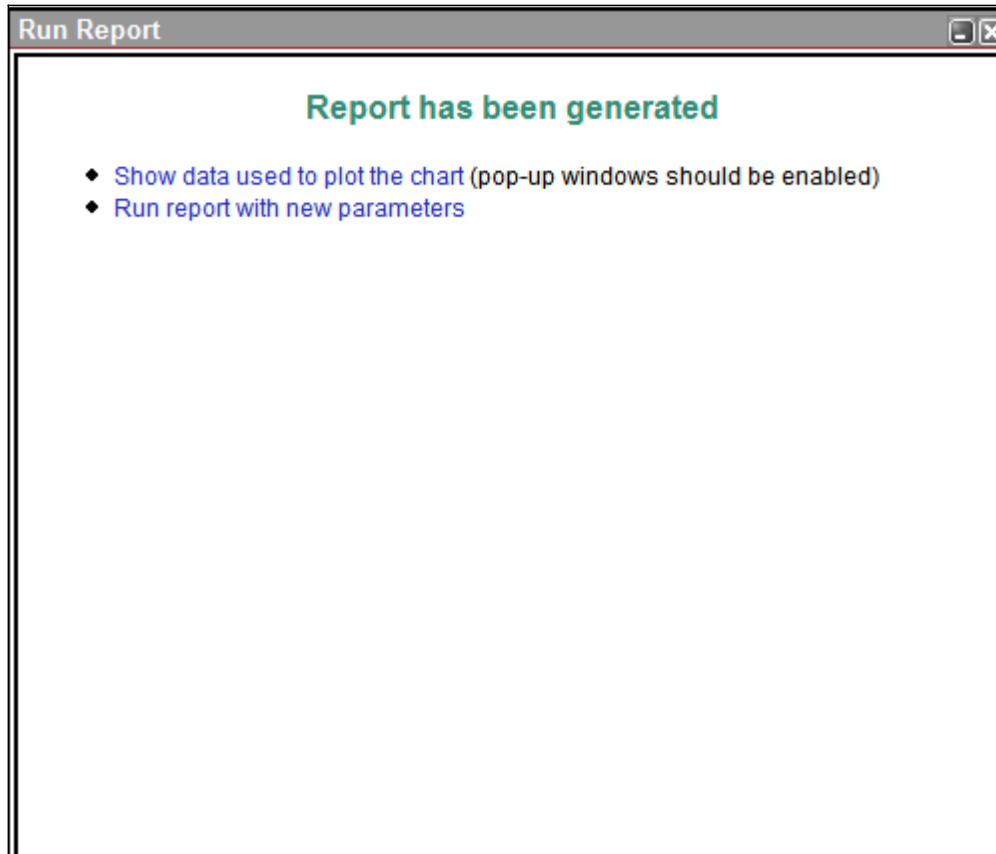


Figure 6.1-5: Report Results Window



49) After clicking the Run Report button, the report will be generated based on available data and displayed on in a new window. Users may then save or **print** the graph. A sample report is shown below in Figure 6.1-5.

Figure 6.1-5: Sample Output Report



50) After clicking on the View Data link, the report is displayed in table format. From the table view, users can select all or highlight, the title, table and note and copy to the clipboard, then paste into an Excel file. Figure 6.1-6 is an example of the report in table format.

Figure 6.1-6: Sample of report in table format.

	Technical Assistance	Assessment	Education/Training
Center	14.56	.97	84.47
Nation	45.78	12.20	42.02

NOTE: Calculations are based on data received on the Project Information File.  
60 of 60 centers reporting.

## (Appendix C) Definitions

### MEP Terminology

**Account Manager** - NIST/MEP staff assigned to support your center in managing the various aspects of the Federal relationship with your organization. The FPO is responsible for business and technical areas such as performance monitoring and center reviews.

**Affiliate** - an informal relationship between the center and an organization that acts as a resource or third-party to the center. An informal relationship may be a reliance on the affiliate for occasional referrals, a resource the center draws on for specific topics, etc. It is not formalized to the extent of a partnership because there is no formal contract between the organization and the center, and the affiliation is not vital to everyday operations of the center.

**Assessment** - An activity type (see definition of type) that characterizes interactions with clients by means of a structured diagnostic analysis performed on a CME where feedback is provided to the CME.

**Business Liaison Specialist** - NIST/MEP staff assigned to support your center in managing the various aspects of the Federal relationship with your organization. The BLS is responsible for administrative aspects such as cooperative agreement renewals and helping the FPO.

**Center** - is an organization managed or tasked by the recipient of a NIST MEP cooperative agreement or a memorandum of understanding to fulfill the terms of that agreement by performing substantive interactions with client manufacturing establishments with the goal of generating positive impact on that establishment. Centers are further defined by the recipient or the state border, whichever area is the smallest.

**Client Served** - A client may be considered served by the center if the interaction between the center and the client results in access to services that improve their global competitiveness by providing information, decision support and/or implementation assistance in adopting new, more advanced manufacturing technologies, techniques and business best practices.

**Client Manufacturing Establishment (CME)** - a single manufacturing establishment, plant, or facility that receives substantive aide from and is a client of the center.

**Education/Training** - Substantive interaction where a CME learns how to employ general or industry-specific business tools or methods to improve an aspect of its business or to build skills.

**Event** - a substantive interaction or set of substantive interactions undertaken with a group of CMEs that pertain to the same type and substance.

**Federal Program Officer (FPO)** - NIST/MEP staff assigned to support your center in managing the various aspects of the Federal relationship with your organization. The FPO is responsible for business and technical areas such as performance monitoring and center reviews.

**First Time Client** – a manufacturing establishment that received substantive aide from the center for the first time ever.

**Grants Specialist** - NIST/MEP staff assigned to support your center in managing the various aspects of the Federal relationship with your organization. The Grants Specialist is responsible for all official approvals regarding your cooperative agreement.

**MAIM** – The “Minimally Acceptable Impact Measures” intent is for MEP to monitor and manage a center based primarily on the aggregate score of the five quantitative components of MAIM. The five quantitative measures are: Bottom-line Client Impact, Cost Per Client Impacted Client, Investment Leverage Ratio, Percent Quantified Impact, and Survey Response Rate.

**Management Staff** – refers to employees of a center (either directly employed by the center or subcontracted to the center as defined in the center operating plan) with the primary job function of providing management and oversight to aspects of center operations.

**MEP System** - is the network of organizations with the common mission of increasing the global competitiveness of U.S. small- and medium-sized manufacturers. This definition includes the MEP centers, their partners, and their recipient and NIST MEP.

**NIST MEP** - a program of the U.S. Department of Commerce created under statutory authority to increase the global competitiveness of U.S. small- and medium-sized manufacturers. This organization provides strategic direction, technical resources, and management oversight of the MEP system.

**Non-substantive Interaction** - an interaction in which the primary objective of center services is to build center-client relationships or market center services.

**Other Support Staff** - refers to employees of a center (either directly employed by the center or subcontracted to the center as defined in the center operating plan). This definition includes center support staff, administrative staff, students, and anyone not covered under the definition of technical specialist, management staff, or sales staff.

**Partner** - an organization that contributes or aligns resources (human and/or monetary) and participates in the management of a portion of the efforts to achieve common center objectives.

**Project** - a substantive interaction or set of substantive interactions of the same type and substance undertaken with a single CME.

**Recipient** - an organization that plays more than a purely financial role in the center's operations, "houses" a center, and has a signed cooperative agreement with NIST.

**Repeat Client** - a manufacturing establishment that received assistance from the center in the past.

**Sales Staff** - Center Staff with the primary job function of selling center services to SMEs. Dedicated sales-staff do not deliver services.

**Small Manufacturing Establishment (SME)** - a single manufacturing plant or facility with 500 or fewer employees. It may or may not be part of a larger firm that operates other establishments.

**Stakeholder** - an organization with interests in and influence on center and/or partner decisions, and whose well being is affected by the center's degree of success in achieving NIST MEP objectives.

**State Funding Partner** - a state government organization that provides funds to a center.

**Substance** - refers to one of the substance codes that describe the topic area that is the main target of services.

**Substantive Interaction** - an interaction in which the primary objective of center services is to facilitate changes in a U.S.-based manufacturing firm's operations, which affect the firm's performance.

**Success Story** - a short, one-page story about an assistance project undertaken by a center that resulted in a success for the manufacturer and the MEP system. These stories are maintained and published by the NIST MEP Communications and Marketing Support Group.

**Technical Assistance** - A type of substantive interaction where technical services and/or information are provided to a CME to help it improve a specific aspect of its business.

**Technical Specialist** - an employee of a center (either directly employed by the center or subcontracted to the center as defined in the center's operating plan) with the primary job function to deliver services to CMEs. A Technical Specialist performs some sales and other functions as part of their duties. The service delivery could be performed either on site at the CME's facility or the person may be charged with outreach and/or marketing to CMEs. These people were previously called field agents, field engineers, brokers, or manufacturing specialists.

**Type** - refers to one of the type codes that describe the type of interaction with the client. Types of interactions are: education/training, assessment, or assistance.

### Source for Centers Navigation Terminology

**“Browse” button** – allows for browsing local and network drives.

**“Cancel” button** – Cancels the present operation.

**“Reset” button** – resets the fields to blank.

**“Run Report” button** – Runs the requested report.

**“Search” button** – Searches database for a single client or project.

**“Submit” button** – Saves information and allows for further editing.

**“Submit For Reporting” button** – Submits data for reporting quarter. Removes checked items. Does not allow further editing. “Finalizes” submission.



**(Appendix D) Allowable Reporting Code**

Table 8-14: Reporting Code List

<b>CIMS Center ID</b>	<b>Stationery Code</b>	<b>Center Name/Stationery Name</b>
165		Alabama Technology Network
165	XL0	ATN Birmingham
165	XL1	ATN University of Alabama in Huntsville
165	XL2	ATN Center for Environmental Technology
165	XL3	ATN University of Alabama Productivity Center
165	XL4	ATN Center for Forestry, Paper and Chemical Technology
165	XL5	ATN Center for Telecommunications
165	XL6	ATN Center for Electronics Technology
165	XL7	ATN Auburn University
165	XL8	ATN Alex City
165	XL9	ATN Bevill Manufacturing Technology Center
222		Alaska Manufacturing Extension Partnership
216		Arizona Manufacturing Extension Partnership
173		Arkansas Manufacturing Solutions
168		California Manufacturing Technology Consulting
172		Catalyst Connection
164		Chicago Manufacturing Center
186		Colorado Association for Manufacturing and Technology
155		Connecticut State Technology Extension Program
204		Corporation for Manufacturing Excellence (MANEX)
188		Delaware Manufacturing Extension Partnership
175		Delaware Valley Industrial Resource Center
156		Enterprise Minnesota
163		Florida Manufacturing Extension Partnership
167		Georgia Manufacturing Extension Partnership
217		Hawaii HTDC- MEP
201		Idaho TechHelp
198		Illinois Manufacturing Extension Center
177		Indiana MEP - Purdue Technical Assistance Program
193		Iowa Center for Industrial Research and Service
200		Kentucky Manufacturing Assistance Center
174		Maine Manufacturing Extension Partnership
194		Manufacturers Resource Center
208		Manufacturing Extension Partnership of Louisiana
196		Manufacturing-Works
184		Maryland Technology Extension Service
182		Massachusetts Manufacturing Extension Partnership
161		Michigan Manufacturing Technology Center

CIMS Center ID	Stationery Code	Center Name/Stationery Name
161	XB1	MMTC - Southeast
161	XB2	The Right Place Program
161	XB3	MMTC--Northeast
161	XB4	MMTC-Northwest
161	XB5	The Manufacturers' Innovation Council
161	XB6	Northern Initiatives
191		Mid-America Manufacturing Technology Center
154	PA4	Mid-Pennsylvania Manufacturing Extension Partnership
154	XK2	Industrial Modernization Center
158		Mississippi Technology Alliance
169		Missouri Enterprise
205		Montana Manufacturing Extension Center
166		Nebraska Manufacturing Extension Partnership
209		Nevada Management Assistance Partnership
210		New Hampshire Manufacturing Extension Partnership
180		New Jersey Manufacturing Extension Partnership
212		New Mexico Manufacturing Extension Partnership
176		New York Manufacturing Extension Partnership
176	NY2	Hudson Valley Technology Development Center
176	NY3	Alliance for Manufacturing and Technology
176	NY4	Industrial & Technology Assistance Corporation
176	NY5	Western New York Technology Development Center
176	NY6	High Technology of Rochester, Inc.
176	NY7	Center for Economic Growth
176	NY8	Central New York Technology Development Organization
176	NY9	Council for International Trade, Technology, Education and Communication
176	NYA	Long Island Forum for Technology, Inc.
176	NYB	Mohawk Valley Applied Technology Commission
171		North Carolina Manufacturing Extension Partnership
199		North Dakota Manufacturing Extension Partnership
192		Northeastern Pennsylvania Industrial Resource Center
179		Northwest Pennsylvania Industrial Resource Center
190		Northwest Wisconsin Manufacturing Outreach Center
219		Ohio Manufacturing Extension Program
219	OH1	The Ohio Manufacturing Extension Program, with services provided by CAMP
219	OH3	The Ohio Manufacturing Extension Program, with services provided by TechSolve
219	OH4	The Ohio Manufacturing Extension Program, with services provided by EISC
219	OH6	The Ohio Manufacturing Extension Program, with services provided by CAMP
219	OHA	The Ohio Manufacturing Extension Program, with services provided by the Manufacturing Resource
219	XG1	The Ohio Manufacturing Extension Program, with services provided by TechSolve
157		Oklahoma Manufacturing Alliance
206		Oregon Manufacturing Extension Partnership
160		Puerto Rico Manufacturing Extension, Inc
183		Rhode Island Manufacturing Extension Services

CIMS Center ID	Stationery Code	Center Name/Stationery Name
202		South Carolina Manufacturing Extension Partnership
220		South Dakota Manufacturing Extension Partnership
197		Tennessee Manufacturing Extension Partnership
159		Texas Manufacturing Assistance Center
213		Utah Manufacturing Extension Partnership
195		Vermont Manufacturing Extension Center
178		Virginia's A.L. Philpott Manufacturing Extension Partnership
211		Washington Manufacturing Services
207		West Virginia Manufacturing Extension Partnership
162		Wisconsin Manufacturing Extension Partnership