

August 2019

How to Register as a proposalCENTRAL User



How to Register as a ProposalCentral User

Your profile allows you to enter personal details that are relevant to your applications. Once you enter your details, the information flows directly into the content of each of your applications. If your details change, you make the change in your profile and the changes are updated automatically.

These instructions include the following:

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Create An Account

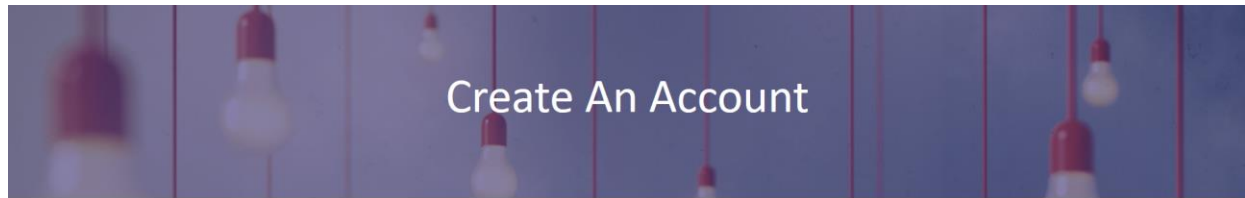
To create an account:


1. Go to <https://proposalcentral.com> and click the orange “CREATE ONE NOW!” button under the Application Login.



APPLICATION LOGIN Username <input type="text" value="Username or E-mail"/> Password <input type="password" value="Password"/> Forgot Your Password? LOGIN <input type="text" value="LOGIN using ORCID"/> Need an account? CREATE ONE NOW! ←	PEER REVIEWER LOGIN CLICK HERE to access the online review	ANNOUNCEMENTS Refer a funding organization to proposalCENTRAL, get a \$25 gift card! Super dooper exciting text that makes you feel a craving to click on this link to test PPS-1237: Grant Opportunity Alerts!! Subscribe American Association for Cancer Research Click here to learn how to win an Amazon Gift Card! QA-ONLY Absolute Link to Grant Opportunities at American Association for Cancer Research
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2. Provide the information requested to create an account and click the 'Save' button.



 Create Account using your ORCID ID

*** Username: ***

Please create a username for this account. Your username and/or email address, in combination with the password created below, allow you to access your proposalCENTRAL account.

*** First Name: ***

Please enter your first name

*** Last Name: ***

Please enter your last name

*** Email: ***

Please provide a primary email address for this account. This email address will be used for all correspondence and notifications from proposalCENTRAL and the participating grant-makers. This email address can be used in place of the username to login.

*** New Password: ***

Please enter a password for this account. Passwords must be 6 to 12 characters in length, with at least one alpha and one numeric character.

*** Confirm Password: ***

Please re-type the password for confirmation.

*** Challenge Question: ***


Please provide a challenge question and an answer below it. These will be used for verification by Customer Service or if the user forgets their password.

*** Answer: ***

By checking the Boxes below, you represent that both you and the person whom this profile represents agree to the Terms of Service and will abide by the Acceptable Use Policy for proposalCENTRAL

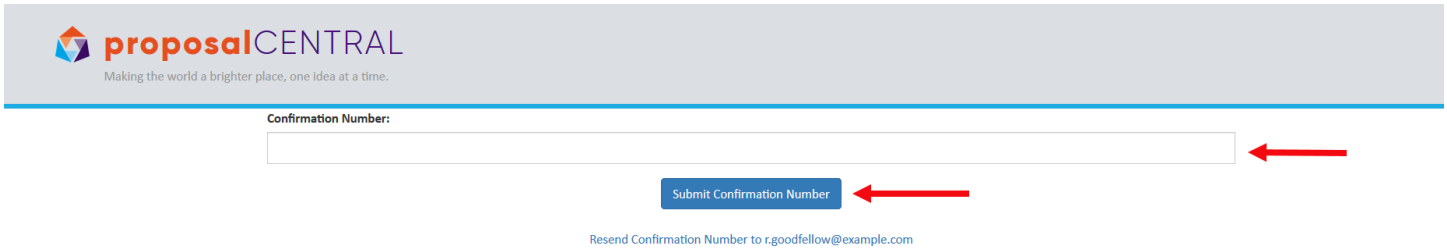
I agree to the [Terms of Service](#).

I agree to the [Acceptable Use Policy](#).



3. An e-mail will be sent to you with a confirmation number. Open the e-mail and copy the confirmation number.

- Return to <https://proposalcentral.com/> and login under the “Application Login” section by providing the username and password you created in Step 2.
- Paste the confirmation number and click the ‘Submit Confirmation Number’ button.



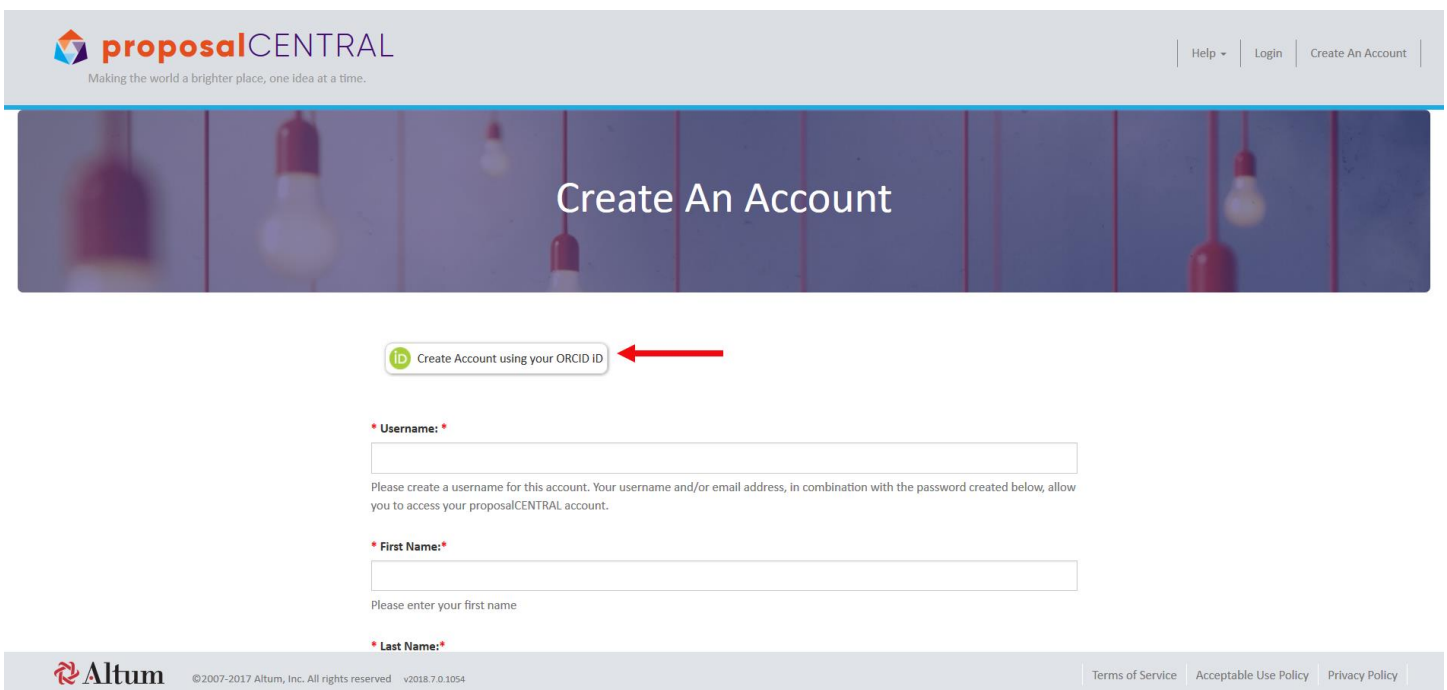
The screenshot shows the top navigation bar with the proposalCENTRAL logo and tagline. Below it is a form titled "Confirmation Number:" with a text input field. A red arrow points to the input field. Below the input field is a blue button labeled "Submit Confirmation Number" with a red arrow pointing to it. At the bottom of the form, there is a link: "Resend Confirmation Number to r.goodfellow@example.com".

Registering with ORCID

ORCID is a service that allows researchers to easily keep track of their publications, institutional associations, and other support. Once you create your ProposalCentral account you have the option to link it to your ORCID account. Information from your ORCID profile can be reused within ProposalCentral streamlining the proposal and reporting process.

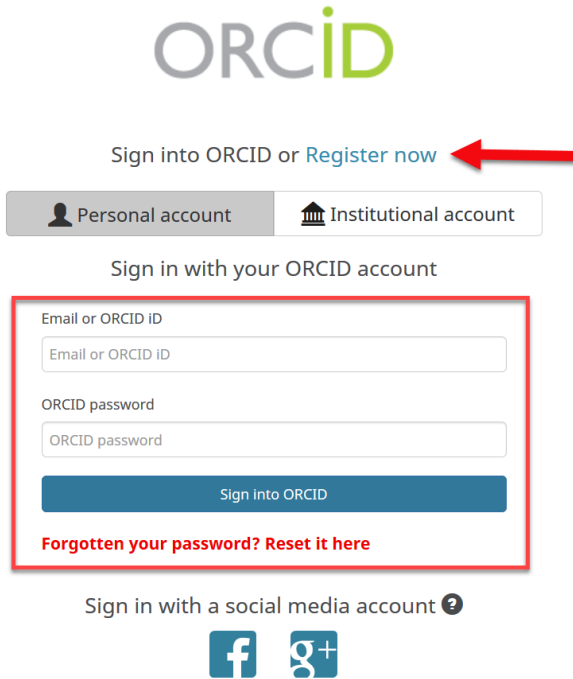
Creating an Account Using ORCID

- Go to https://proposalcentral.com and click the orange “CREATE ONE NOW!” button under the Application Login.
- Click on the **Create Account using your ORCID iD** button

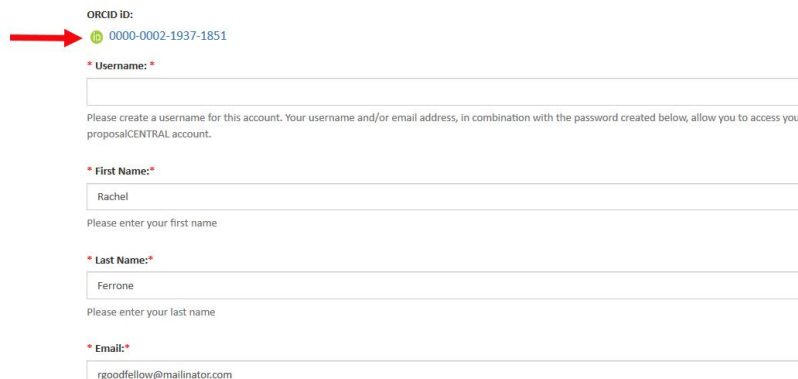
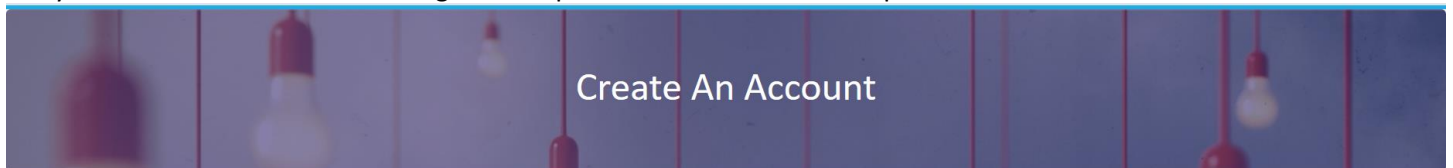


The screenshot shows the "Create An Account" page. At the top, there is a navigation bar with the proposalCENTRAL logo and tagline, and links for "Help", "Login", and "Create An Account". The main heading is "Create An Account". Below the heading, there is a button labeled "id Create Account using your ORCID iD" with a red arrow pointing to it. Below the button are three required input fields: "Username:", "First Name:", and "Last Name:". Each field has a red asterisk indicating it is required. Below the "Username:" field, there is a note: "Please create a username for this account. Your username and/or email address, in combination with the password created below, allow you to access your proposalCENTRAL account." At the bottom of the page, there is a footer with the Altum logo, copyright information, and links for "Terms of Service", "Acceptable Use Policy", and "Privacy Policy".

3. You are taken to the ORCID login where you are prompted to enter your ORCID username and password and click the **Sign into ORCID** button

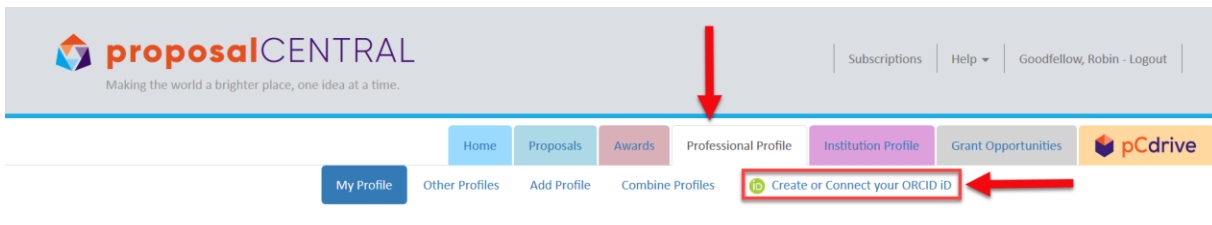


4. Once you successfully sign into ORCID you will be re-directed back to the ProposalCentral registration page, where your ORCID iD, First Name, Last Name, and Email will auto-populate from ORCID. Complete the rest of your details and continue the registration process as described in the previous section “Create an Account”

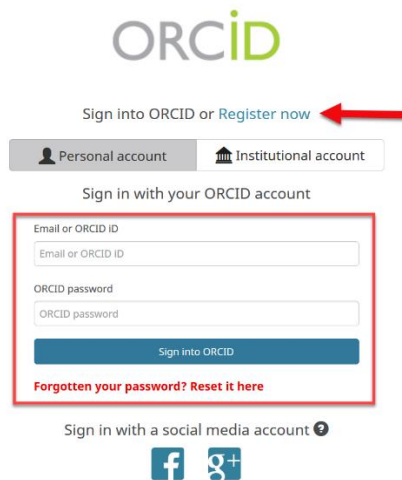


To link an ORCID account:

1. Go to the green “Professional Profile” tab and click the link that says “Create or Connect your ORCID iD”



2. You are directed to the ORCID login screen. If you already have an account, then login with your ORCID iD and password. If you do not have an ORCID account but would like to establish one, then click the “Register Now” link.



When you connect your ORCID iD with your ProposalCentral profile, you can easily transfer information from your ORCID record to ProposalCentral and take some of the pain out of online form-filling. Instead of re-keying the same information every time you submit a grant application, ProposalCentral can retrieve relevant data, where available, directly from your ORCID record. All you'll need to do is verify that it's correct!






IMPORTANT: When registering your ORCID account you are asked to select your Visibility Settings. In order to link the information from your ORCID to your ProposalCentral account you must select the 'Everyone' option. If your ORCID account is marked as private, then the information will not be visible in ProposalCentral. See screenshot below.

Visibility settings

Your ORCID ID connects with your ORCID record that can contain links to your research activities, affiliations, awards, other versions of your name, and more. You control this content and who can see it.

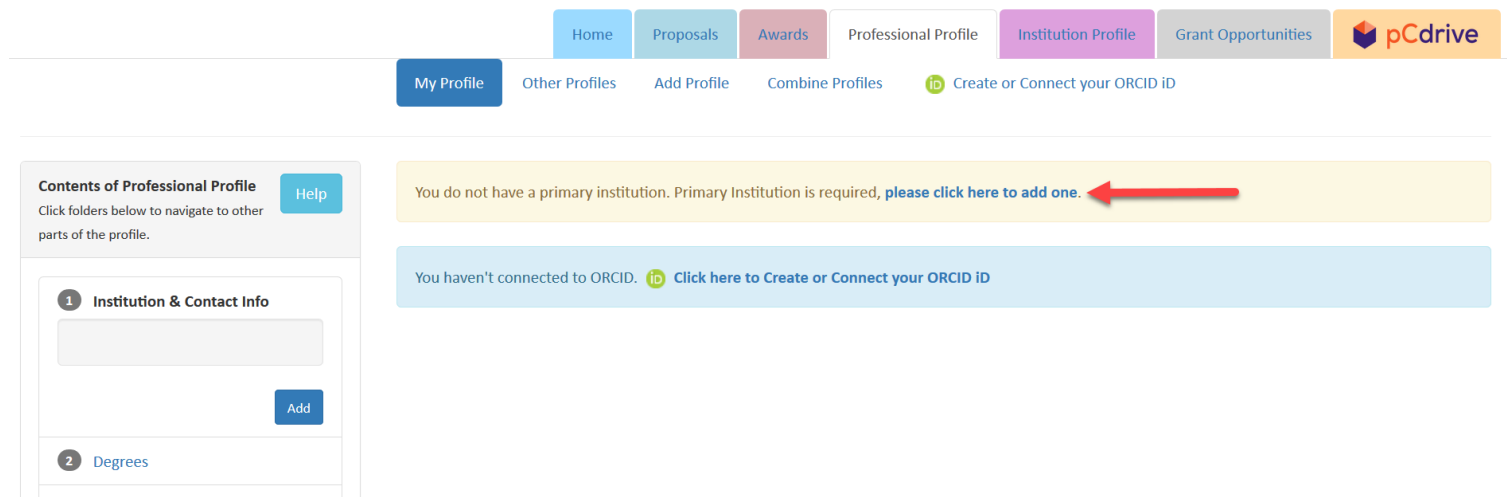
By default, who should be able to see information added to your ORCID Record?

-  **Everyone** (87% of users choose this)
-  **Trusted parties** (5% of users choose this)
-  **Only me** (8% of users choose this)

Affiliating with an Institution Profile

To add an Institution Profile to your Professional Profile:

1. Click the link showing in the “Institution & Contact Info” section of the Professional Profile. This is the screen that you are directed to after logging in and clicking on the green Professional Profile tab.



The screenshot shows the user interface of the Professional Profile page. At the top, there are navigation tabs: Home, Proposals, Awards, Professional Profile, Institution Profile, Grant Opportunities, and pCdrive. Below these are sub-tabs: My Profile, Other Profiles, Add Profile, Combine Profiles, and Create or Connect your ORCID ID. The main content area is divided into two sections. On the left, under 'Contents of Professional Profile', there is a 'Help' button and a list of folders: '1 Institution & Contact Info' (selected) and '2 Degrees'. The 'Institution & Contact Info' folder is expanded, showing a search input field and an 'Add' button. On the right, there are two messages. The top one is a yellow warning: 'You do not have a primary institution. Primary Institution is required, please click here to add one.' with a red arrow pointing to the link. The bottom one is a blue informational message: 'You haven't connected to ORCID. Click here to Create or Connect your ORCID ID'.

2. Enter a partial name search for your organization and click the ‘Display Results’ button.



TIP: Make sure to include a key word from your organization’s name, but not the complete name. For example, if your organization is called “The University of America in DC”, you could search for “University of America” or even more generally “America”.

Home Proposals Awards Professional Profile Institution Profile Grant Opportunities pCdrive

Create New Institution Maintain Institution Profiles Search Registered Institutions Add/Edit Institution Profile Instructions

If you do not find your institution in the search results, then please use the "Create New Institution" button.

Institution Name (partial):
A maximum of 100 results will be returned based on the search text.

Institution City:
Enter entire city name.

Institution State:

Institution Country:

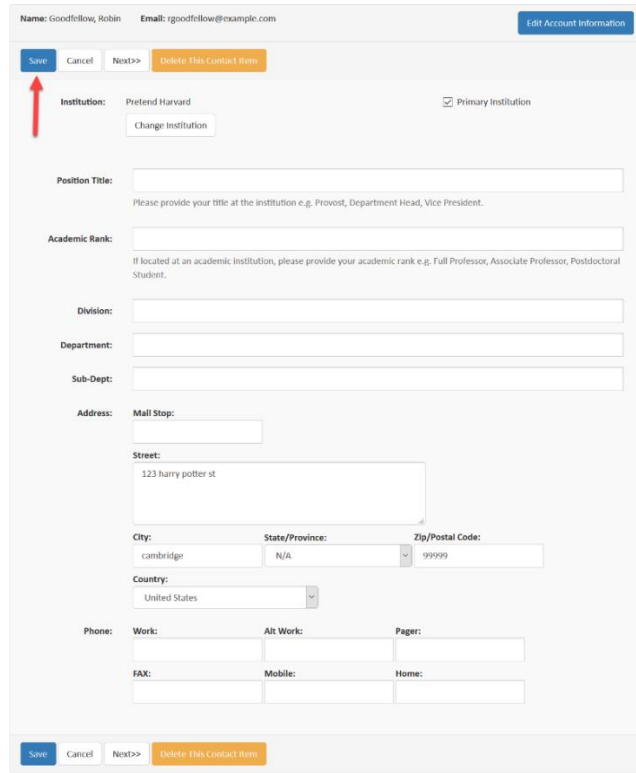
3. If you:

- a. **See your institution listed**, select it by clicking the radio select in the left column and click the **Select** button at the bottom.

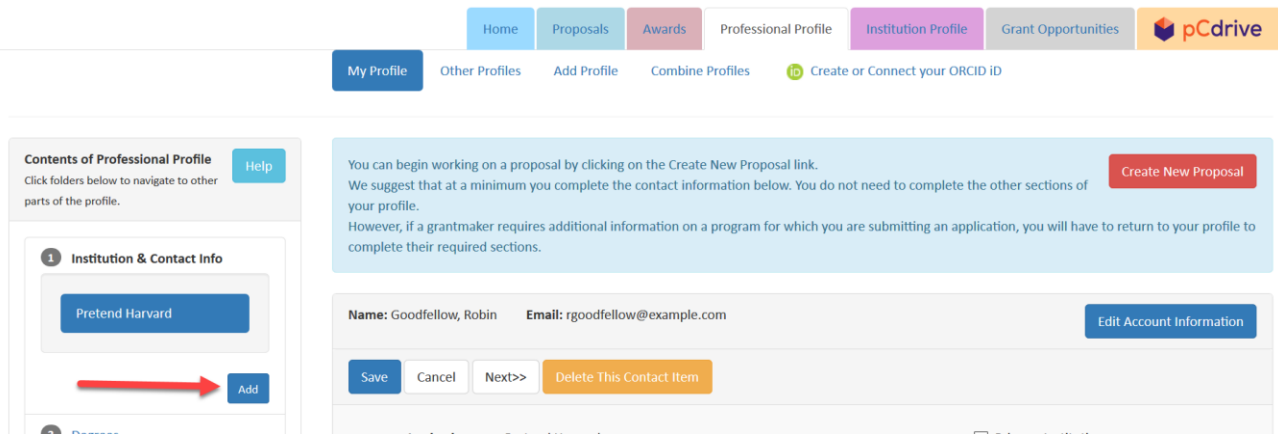
Select	Institution Name	Institution Status
<input type="radio"/>	Pretend Harvard	Confirmed

Do NOT see your institution listed, please contact Altum Customer Service.

4. The address from the Institution Profile populates your Professional Profile, but you can update any of the information that is showing (e.g. changing your street address). Additionally, you should populate the other fields (e.g. Position Title, Phone). Most grant makers request this information in their applications and the information from your profile flows into your applications, so you don't have to re-enter later. Make sure to click the 'Save' button to retain changes.

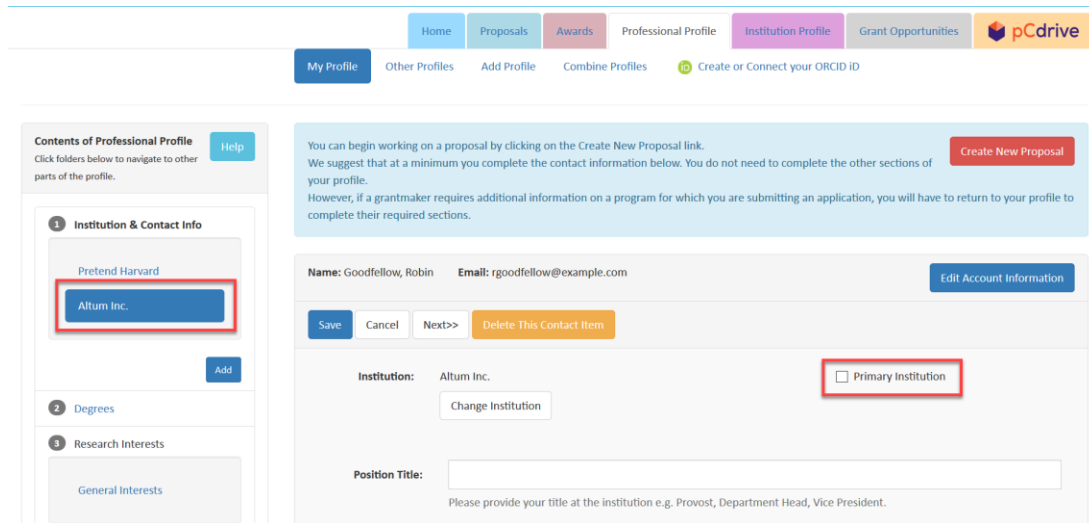


- If you are affiliated with multiple institutions (e.g. a hospital and academic institution), you can add another Institution Profile to your Professional Profile by clicking the Add link in the “Institution & Contact Info” section in the menu on the left.



- Repeat steps 2-4 above to search for and select the appropriate Institution Profile.
- The first Institution Profile added is considered your “Primary Institution”. The “Primary Institution” is what displays by default as the Lead Institution when you start an application. However, you can change the Lead Institution in your application to another institution if necessary.

Additionally, you can change which Institution Profile is listed as your “Primary Institution” at any time. To do this, click the checkbox for “Primary Institution” that shows below the institution name on the screen that allows you to edit your contact information for that Institution Profile. Click ‘Save’ to retain the change.



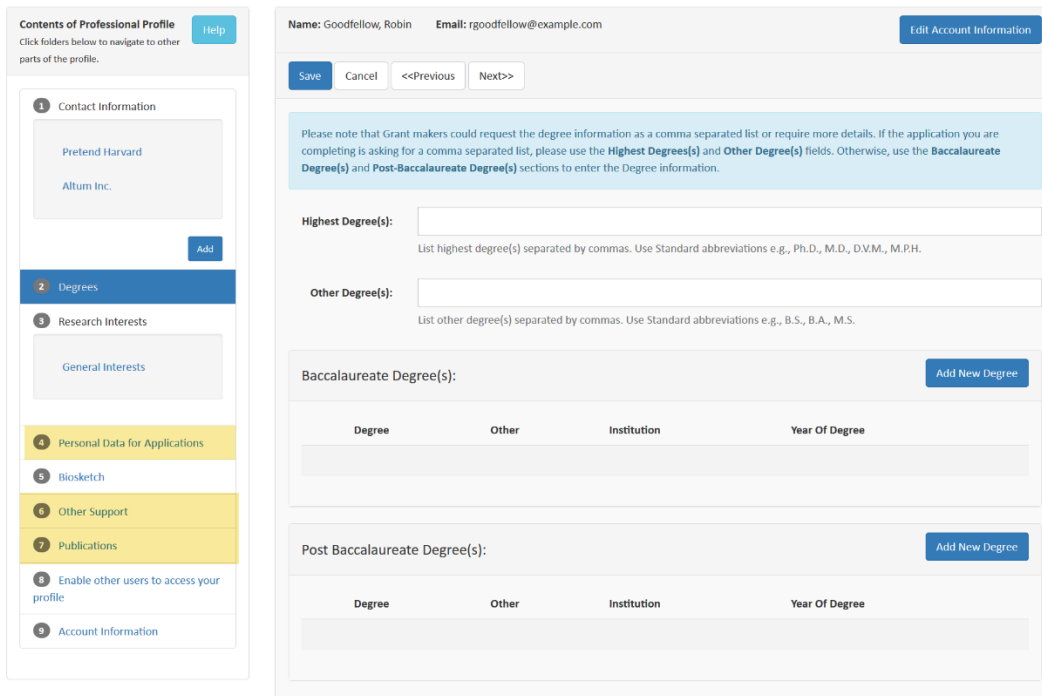
Populating Your Professional Profile

The ProposalCentral Professional Profile allows you to store information about yourself that may be requested in applications, including:

1. Degrees
2. Personal data (aka demographic data)
3. Other Support
4. Publications

If you do not complete this information in your Professional Profile and the grant maker you are applying to is requesting it, you must return to your Professional Profile later to complete it.

To work on a section, click the name of the section in the menu on the left. Make sure to always click the **Save** button to retain changes.



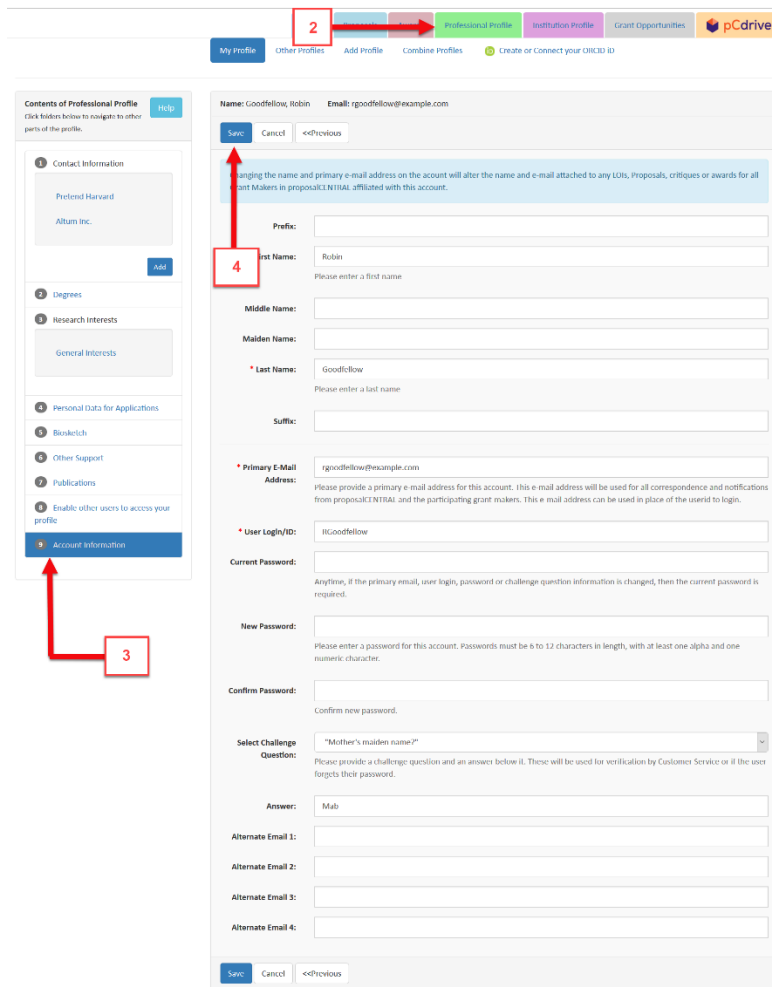
The image shows two screenshots of the Altum proposal system. The left screenshot, titled 'Contents of Professional Profile', shows a sidebar with numbered sections: 1. Contact Information (with 'Pretend Harvard' and 'Altum Inc.'), 2. Degrees (highlighted), 3. Research Interests (with 'General Interests'), 4. Personal Data for Applications, 5. Biosketch, 6. Other Support, 7. Publications, 8. Enable other users to access your profile, and 9. Account Information. The right screenshot, titled 'Edit Account Information', shows user details for 'Goodfellow, Robin' and 'rgoodfellow@example.com'. It includes 'Save', 'Cancel', '<<Previous', and 'Next>>' buttons. A blue note states: 'Please note that Grant makers could request the degree information as a comma separated list or require more details. If the application you are completing is asking for a comma separated list, please use the Highest Degree(s) and Other Degree(s) fields. Otherwise, use the Baccalaureate Degree(s) and Post-Baccalaureate Degree(s) sections to enter the Degree information.' Below this are input fields for 'Highest Degree(s):' and 'Other Degree(s):', each with a list of abbreviations. There are also two tables for 'Baccalaureate Degree(s):' and 'Post Baccalaureate Degree(s):', each with columns for 'Degree', 'Other', 'Institution', and 'Year Of Degree' and an 'Add New Degree' button.

The Degrees and Personal Data sections are self-explanatory. The Other Support and Publication sections have specific instructions available. Click the appropriate link to be directed to those instructions: [Other Support](#) or [Publications](#).

Changing Your Password or Account Information

If you need to update the basic information supplied when the account was created (i.e. your name, e-mail, username, password, challenge question), follow these steps:

1. If you're not already logged in, go to <https://proposalcentral.com/> and login under the "Application Login" section.
2. Click the green Professional Profile tab.
3. Click the Account Information link in the menu on the left.
4. Update the necessary information and click the 'Save button'. If you want to make the following changes, you need to enter your existing password in the "Current Password" field as well:
 - a. Primary E-Mail Address
 - b. User Login/ID
 - c. New Password
 - d. Challenge Question

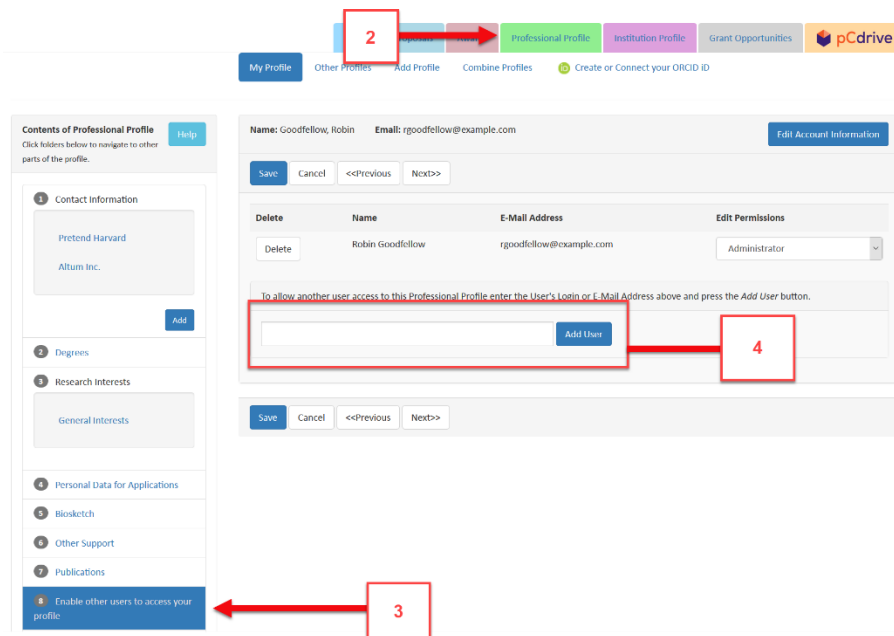


The screenshot shows the 'Contents of Professional Profile' page. At the top, there are navigation tabs: 'My Profile', 'Other Profiles', 'Professional Profile' (highlighted in green), 'Institution Profile', and 'Grant Opportunities'. Below the tabs are buttons for 'Add Profile', 'Combine Profiles', and 'Create or Connect your ORCID ID'. On the left, a sidebar lists profile sections: 'Contact Information', 'Degrees', 'Research Interests', 'Personal Data for Applications', 'Biotech', 'Other Support', 'Publications', and 'Account Information' (highlighted in blue). A red arrow labeled '3' points to the 'Account Information' link. The main content area shows the 'Account Information' form for 'Robin Goodfellow'. A red arrow labeled '4' points to the 'Enable other users to access your profile' link. A red arrow labeled '2' points to the 'Professional Profile' tab. The form includes fields for Name, Email, Prefix, First Name, Middle Name, Maiden Name, Last Name, Suffix, Primary E-Mail Address, User Login/ID, Current Password, New Password, Confirm Password, Select Challenge Question, Answer, and Alternate Email addresses.

Enabling Others to Access Your Profile

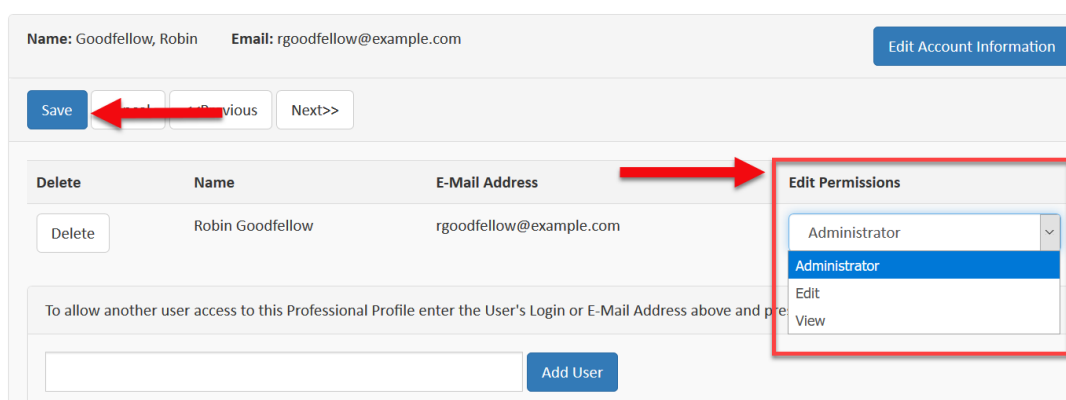
Most likely there are other individuals at your organization who you may want to have access to your profile in order to help maintain it (e.g. administrative assistant). To grant other users access to your profile, follow these steps:

1. If not already logged in, go to <https://proposalcentral.com/> and login under the “Application Login” section.
2. Click the green Professional Profile tab.
3. Click the Enable other users to access your profile link in the menu on the left.
4. Enter the e-mail address of the person and click the Add User button. Please note that the person **must** already have a ProposalCentral account. If they do not, they can create an account using the instructions found in the first section regarding creating a new account.



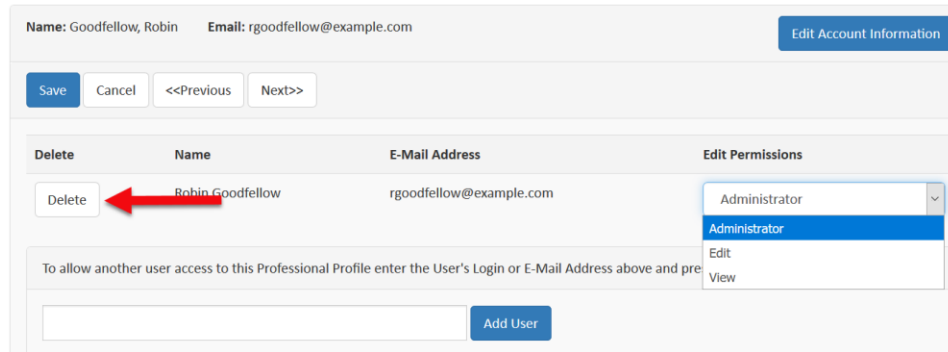
5. Select the desired permission level for the person and click the 'Save' button. The permissions are as follows:

- Administrator: The user can make any changes to your profile, including granting other users access to your profile (i.e. what you're doing now).
- Edit: The user can make any changes to your profile, EXCEPT they cannot grant other users access to your profile (i.e. what you're doing now) or see who has access to your profile.
- View: The user can only see your profile information; they cannot make any changes. They cannot see the other users who have access to your profile.



6. To enable others to access your profile, repeat steps 4-5.

If you need to remove a user's access to your profile, repeat steps 1-3 above. When you arrive at the user access table, click the Delete link next to the user to remove.



The screenshot shows a user management interface for a professional profile. At the top, it displays the user's name "Goodfellow, Robin" and email "rgoodfellow@example.com", along with an "Edit Account Information" button. Below this are navigation buttons: "Save", "Cancel", "<<Previous", and "Next>>".

Delete	Name	E-Mail Address	Edit Permissions
Delete	Robin Goodfellow	rgoodfellow@example.com	<ul style="list-style-type: none">AdministratorAdministratorEditView

Below the table, there is a text prompt: "To allow another user access to this Professional Profile enter the User's Login or E-Mail Address above and press". This is followed by an input field and an "Add User" button. A red arrow in the image points to the "Delete" link in the table row.