proposalcentral

How to Register as a ProposalCentral User

altum

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.
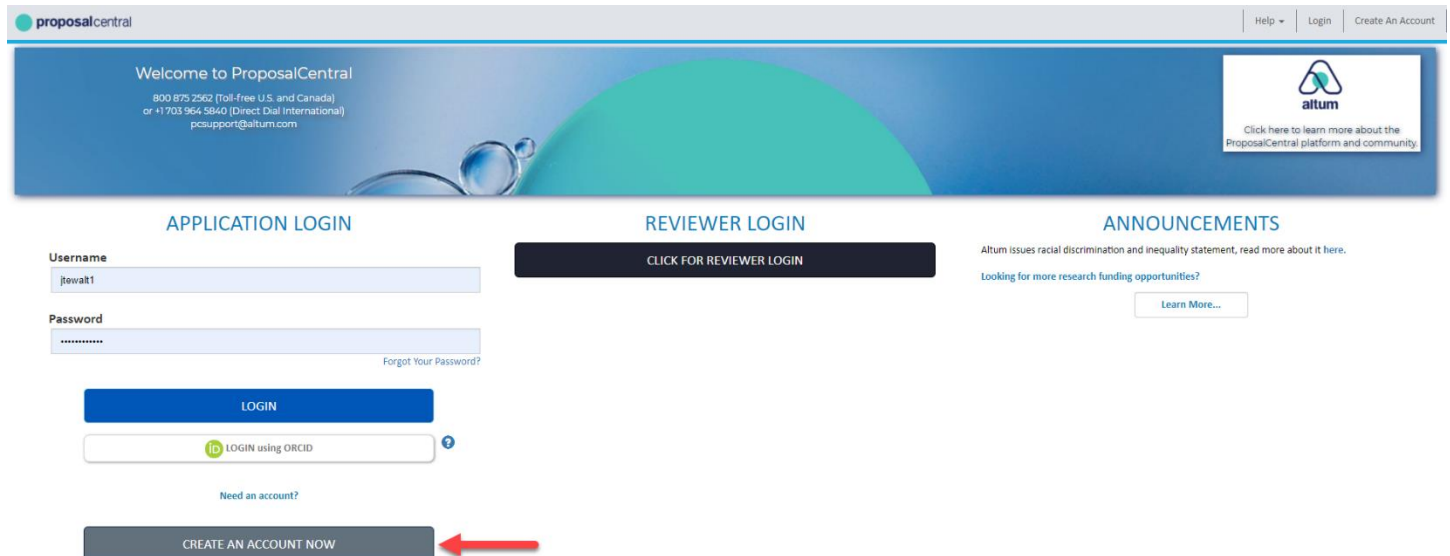
These instructions include the following:
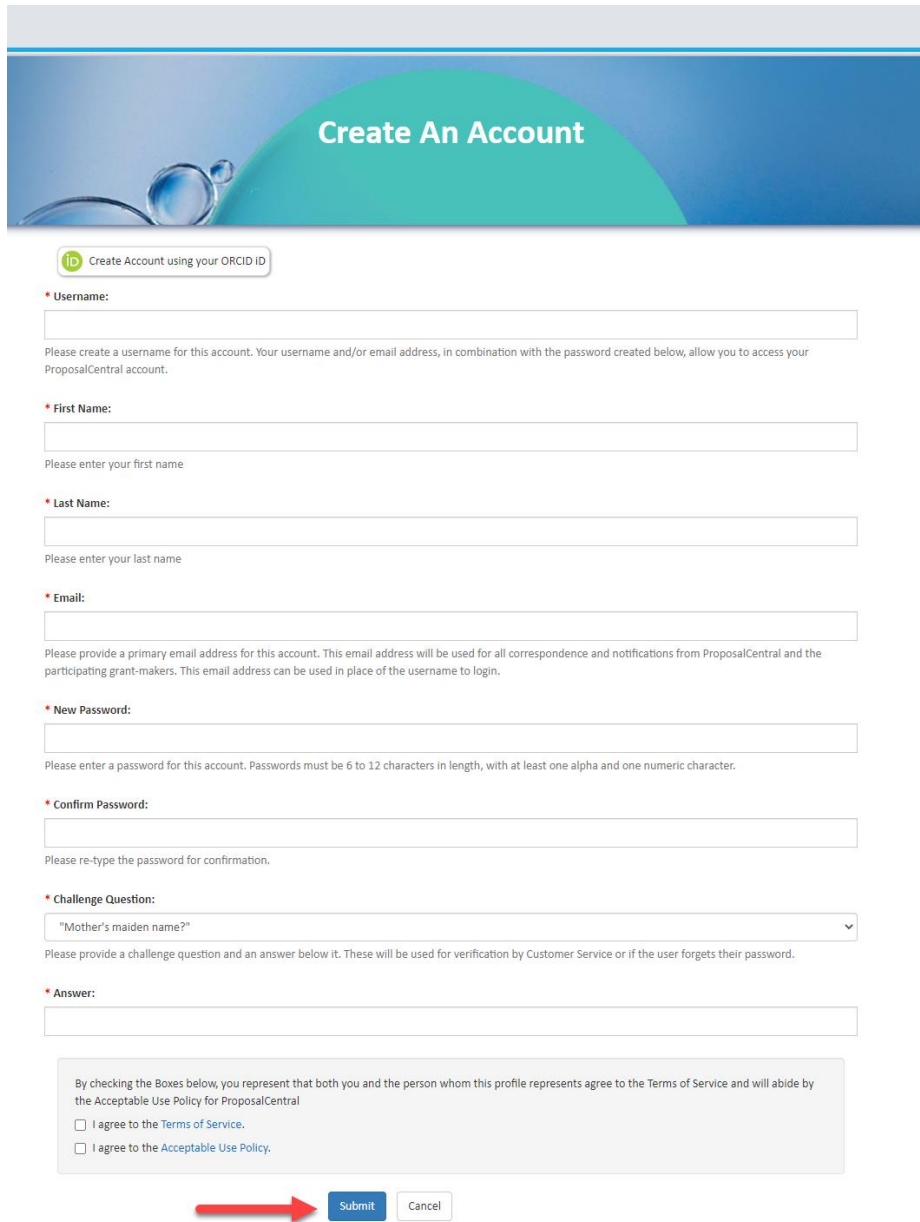
Create An Account

To create an account:

1. Go to https://proposalcentral.com and click the grey "CREATE AN ACCOUNT NOW" button under the Application Login.

2. Provide the information requested to create an account and click the **Submit** button.

3. An e-mail is sent with a confirmation number. Open the e-mail and copy the confirmation number.

4. Return to https://proposalcentral.com/ and login under the "Application Login" section by providing the username and password you created in Step 2.

proposal central

CUSTOMER SUPPORT:
800-875-2562 (Toll-free U.S. & Canada)
+1-703-964-5840 (Direct Dial International)
pcsupport@altum.com

5. When prompted, paste the confirmation number found in your email <mark>from step 3</mark> and click the 'Submit Confirmation Number' button.

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 record can be reused within ProposalCentral streamlining the proposal and reporting process. For more information about ORCID, visit their web site at orcid.org.

Creating an Account Using ORCID

1. Go to https://proposalcentral.com and click the grey "CREATE AN ACCOUNT NOW " button under the Application Login.
2. Click on the **Create Account using your ORCID iD** button.
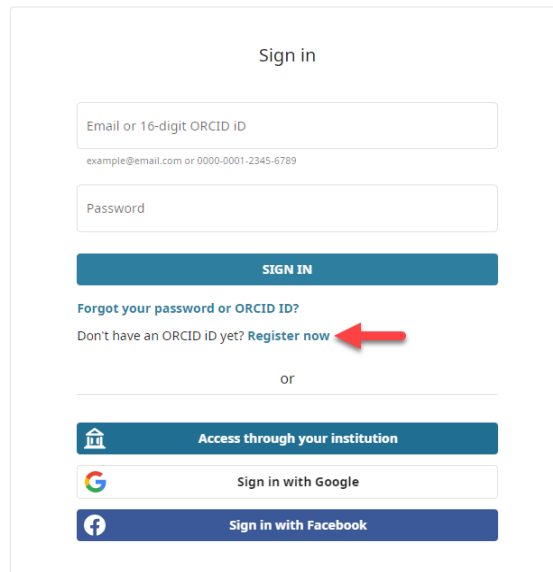
proposalcentral

CUSTOMER SUPPORT:
800-875-2562 (Toll-free U.S. & Canada)
+1-703-964-5840 (Direct Dial International)
pcsupport@altum.com

3. The user is directed to the ORCiD login and prompted to enter your ORCiD username and password and click the **Sign into ORCID** button.

4. Once you are successfully signed into ORCID users are re-directed back to the ProposalCentral registration page, where your ORCID iD, First Name, Last Name, and Email are auto-populated 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 "Professional Profile" tab and click the link that says "Create or Connect your ORCID iD"

2. Users 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.
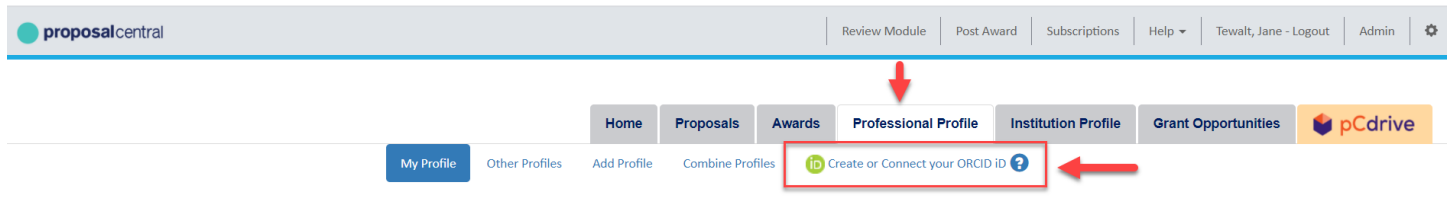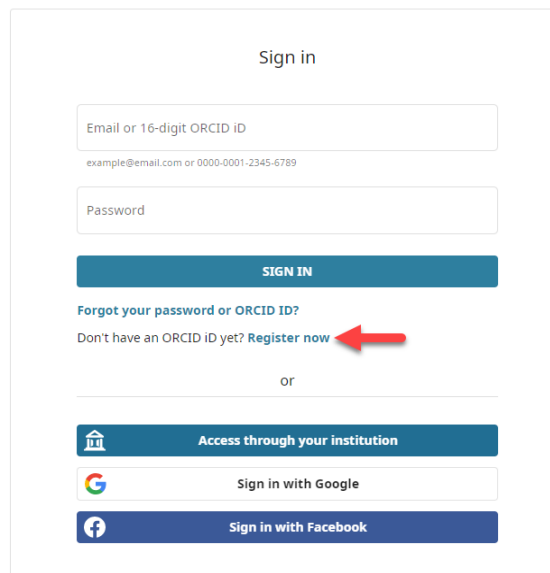

When you connect your ORCID iD with your ProposalCentral profile, you can easily transfer information from your ORCID record to ProposalCentral and take some of the pain out of online form-filling. Instead of re-keying the same information every time you submit a grant application, ProposalCentral can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

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. More information is also available directly from ORCID at orcid.org.

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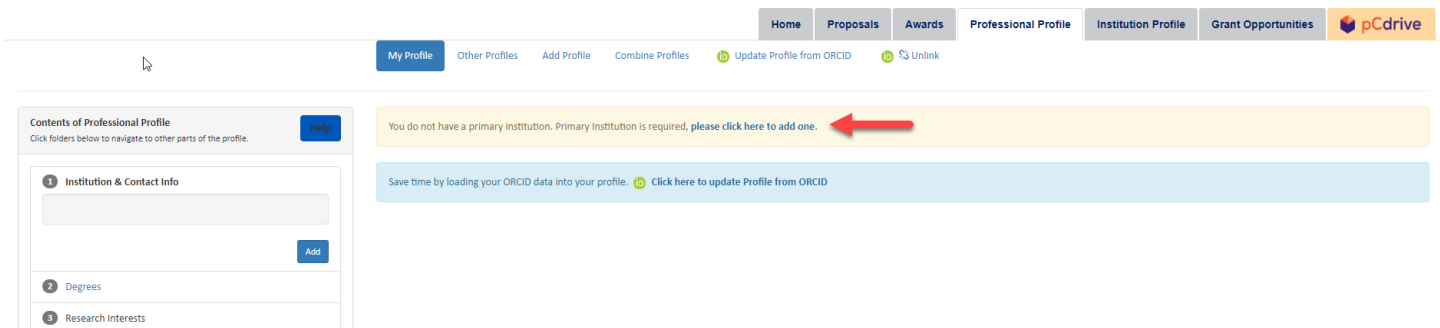
By default, who should be able to see information added to your ORCID Record?

○ 👥 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 Professional Profile tab.
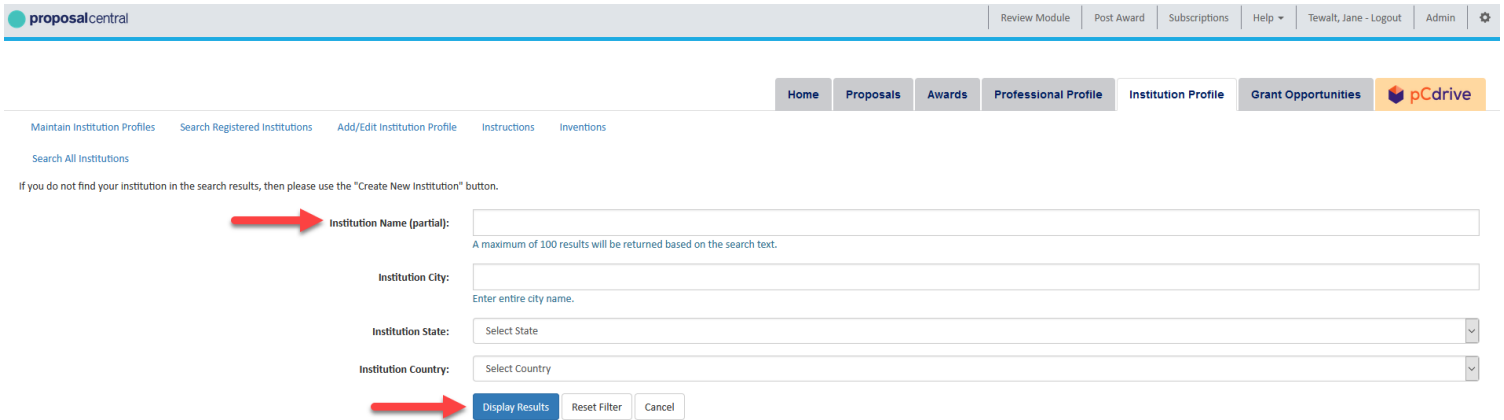
2. Enter a partial name search for your organization and click the **Display Results** button.

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", search for "University of America" or even more generally "America".

proposalcentral				Review Module	Post Award	Subscriptions	Help ▾	Tewalt, Jane - Logout	Admin	⚙

Home | Proposals | Awards | Professional Profile | **Institution Profile** | Grant Opportunities | 🔶 pCdrive

Maintain Institution Profiles   Search Registered Institutions   Add/Edit Institution Profile   Instructions   Inventions

Search All Institutions

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: [Select State   ▾]

Institution Country: [Select Country   ▾]

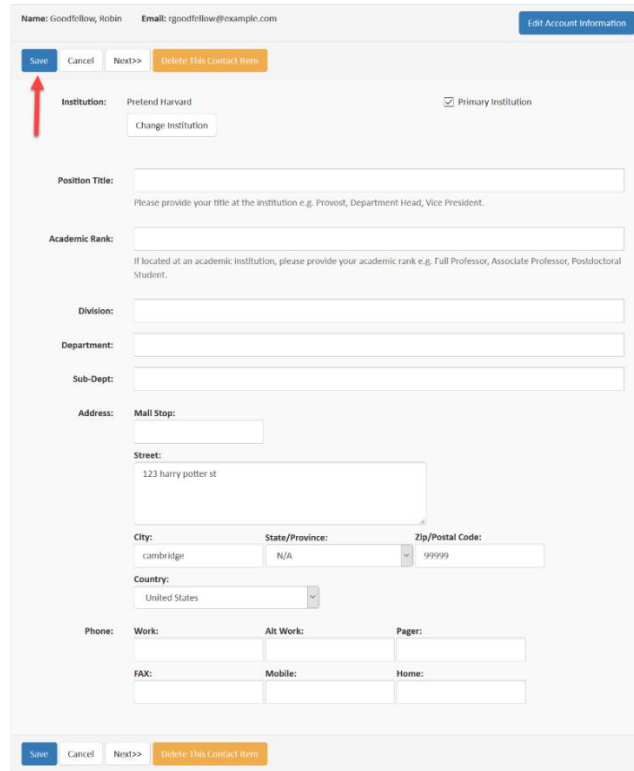[Display Results] [Reset Filter] [Cancel]

3. If:
   Your institution is listed, select it by clicking the radio button in the left column and click the **Select** button at the bottom.

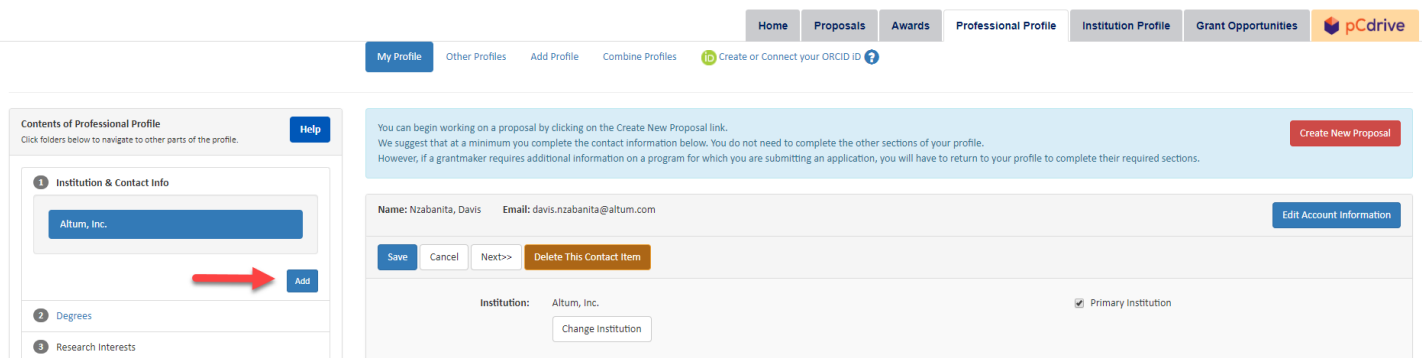| Select	Institution Name	Institution Status
○	Pretend Harvard	Confirmed

[Select] [Cancel]

Your institution is NOT listed, please contact Altum Customer Service.

4. The address from the Institution Profile populates your Professional Profile, but users can update any of the information that displays (e.g. change street address). Additionally, it is recommended that users populate the other fields (e.g. Position Title, Phone). Most grant makers request this information in the applications and the information from your profile flows into applications, so you do not have to re-enter later. Make sure to click the **Save** button to retain changes.
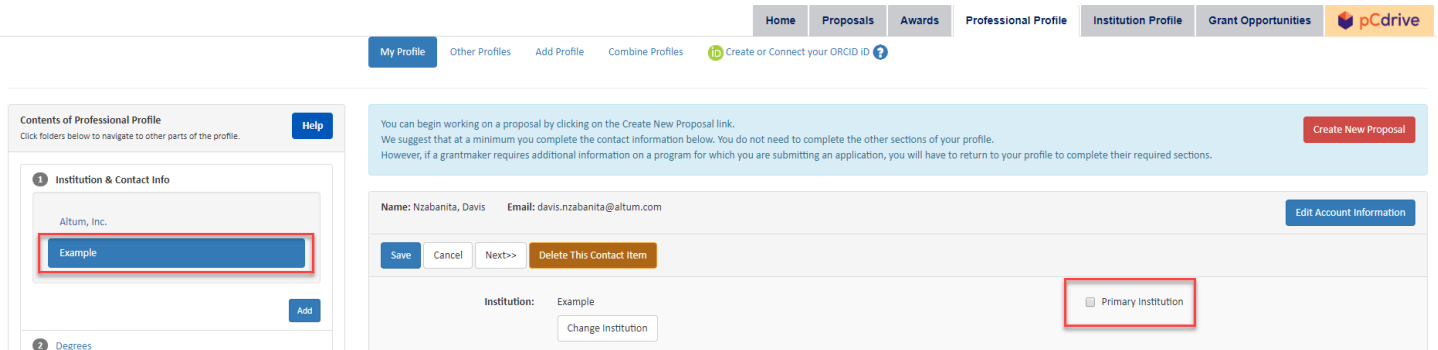
proposalcentral

CUSTOMER SUPPORT:
800-875-2562 (Toll-free U.S. & Canada)
+1-703-964-5840 (Direct Dial International)
pcsupport@altum.com

5. If affiliated with multiple institutions (e.g. a hospital and academic institution), users can add another Institution Profile to the Professional Profile by clicking the **Add** button in the "Institution & Contact Info" section in the left menu.

6. Repeat steps 2-4 to search for and select the appropriate Institution Profile.

7. The first Institution Profile added is considered the "Primary Institution". The "Primary Institution" is what displays by default as the Lead Institution when starting an application. However, users can change the Lead Institution in applications to another institution as necessary.

Additionally, users can change which Institution Profile is listed as the "Primary Institution" at any time. To do this, click the checkbox for "Primary Institution" that displays below the institution name on the edit contact information screen for the Institution Profile. Click **Save** to retain the change.

Populating Your Professional Profile

The ProposalCentral Professional Profile allows users to store personal information that may be requested in applications, including:

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

If users do not complete this information in the Professional Profile and the grant maker is requesting it, users must return to the 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.

proposalcentral

CUSTOMER SUPPORT:
800-875-2562 (Toll-free U.S. & Canada)
+1-703-964-5840 (Direct Dial International)
pcsupport@altum.com
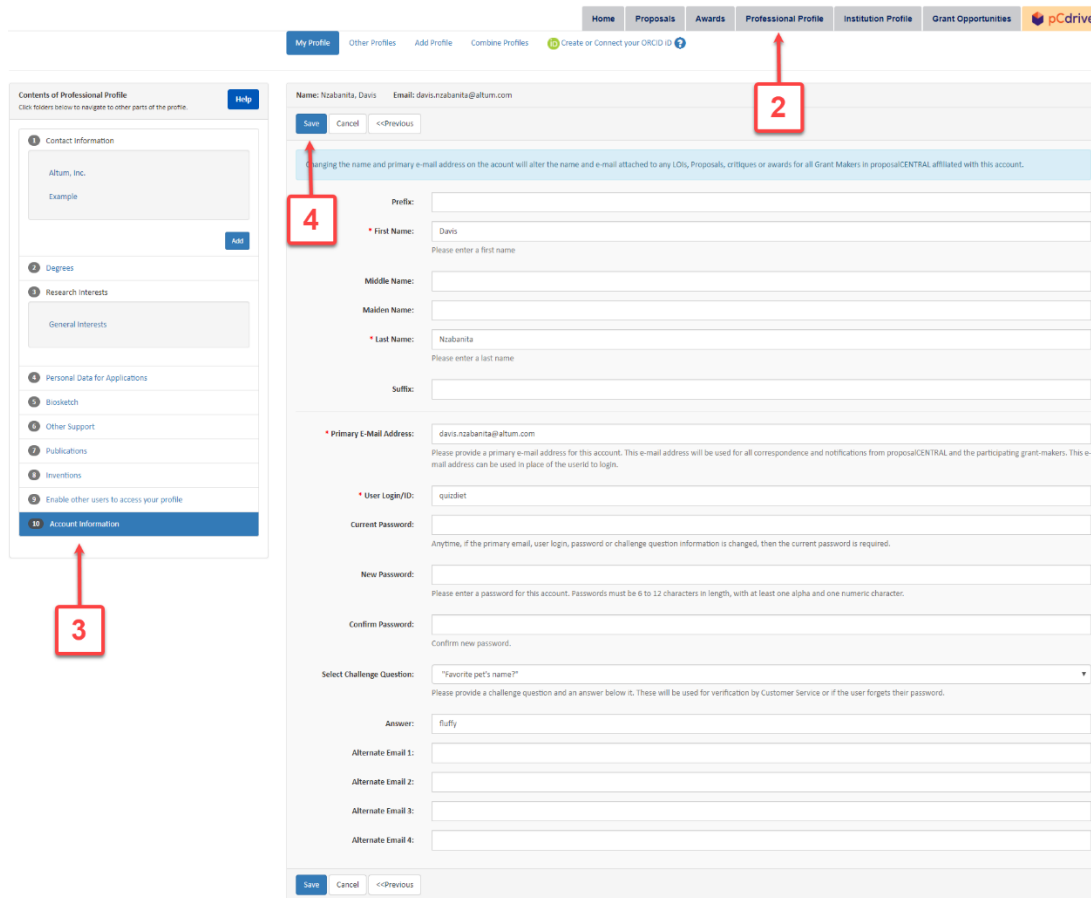
The individual sections include instructions on what information is entered, how to update it and maintain it current for use in applications and grant deliverable tasks.

Changing Passwords or Account Information

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

1. If not already logged in, go to https://proposalcentral.com/ and login under the "Application Login" section.

2. Click the 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. To make the following changes, 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
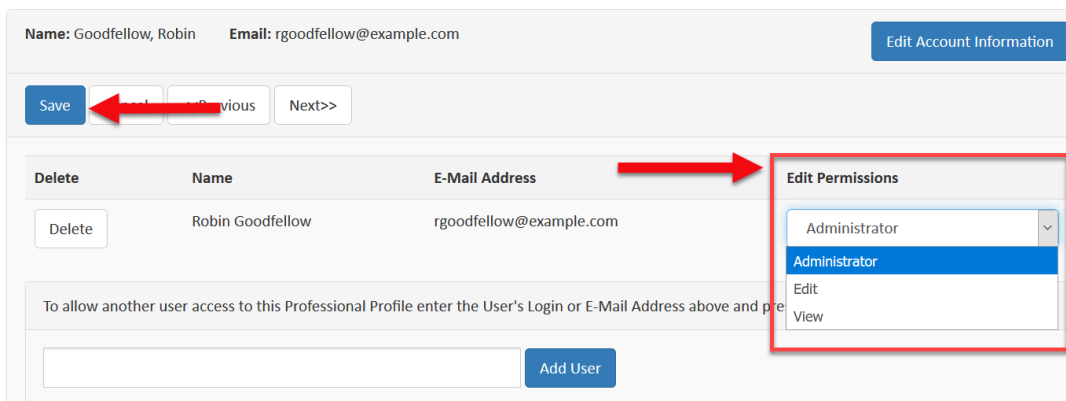
Enabling Others to Access Your Profile

Most likely there are other individuals at your organization who you may want to allow 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 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 not, they can create an account using the instructions found in the first section regarding creating a new account.
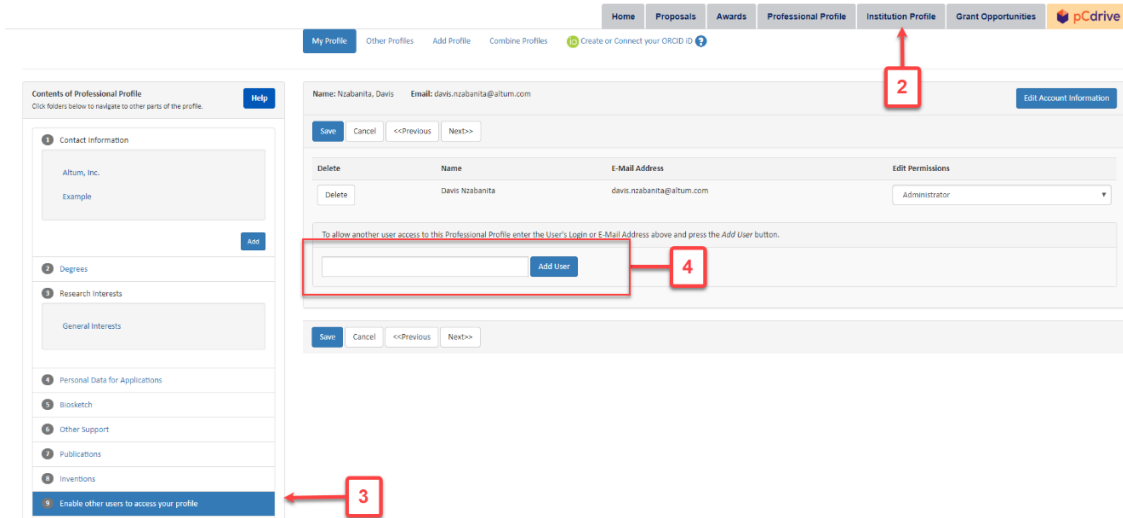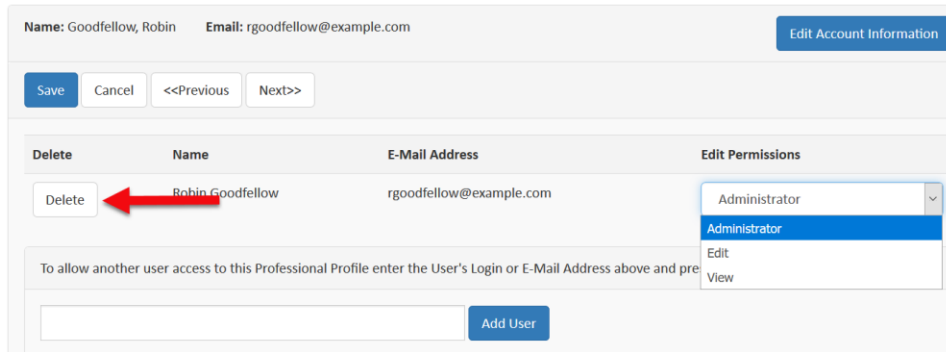
5. Select the desired permission level for the person and click the 'Save' button. The permissions are as follows:

   o 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).

   o 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.

   o 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.

proposal central

CUSTOMER SUPPORT:
800-875-2562 (Toll-free U.S. & Canada)
+1-703-964-5840 (Direct Dial International)
pcsupport@altum.com

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.