Altum

proposalCENTRAL™

Prepare and Submit a Proposal.

If you need assistance, contact Customer Service by email at pcsupport@altum.com or by phone at 1-800-875-2562

Recommended Software

proposalCENTRAL Recommends Software for PDF Generators

Many of the grantmakers in proposalCENTRAL request or require that applicants submit their attachments as portable document format (.pdf).

Some of the benefits of using the PDF format are listed below:

1) The files are smaller than a comparable MS Word file with many images.

2) Files in PDF format don't have compatibility problems between versions that files in MS Word or other software formats might have.

3) The file is in a non-revisable format that ensures the person receiving or reviewing the file sees the file exactly as it was submitted.

In order to save your documents as PDFs, you will need to use PDF generator software. The National Endowment for Humanities website (neh.gov) provides a list of PDF generators, available for both PCs and Macs, along with websites that will do the conversion for you. Many are free or very low-cost.

Click the link below for a list of available PDF generators:

http://www.neh.gov/grants/grantsgov/pdf.html

Prepare and Submit a Proposal.

This tutorial will show you how to create and submit your Application.

In this tutorial you will:

- Go to Grant Opportunities and "Apply Now"
- Prepare your Application
- Download and Attach Files
- Validate and Submit your Application

The proposalCENTRAL Menus

Once you have logged into proposalCENTRAL and completed your professional profile, you will view the main page with 4 menu tabs at the top of page to navigate the main parts of the system. They include:

- **Manage Proposals**
- **Professional Profile**
- **Institution Profile**
- **Grant Opportunities**

Under each tab is a blue color coded horizontal bar with menu items available for you to select.

Each of the tabs has different sub menus. The default tab is “Manage Proposals”. The default sub menu is “In Progress”. Once your proposal has been submitted it will move to the “Submitted” sub menu section.

All Proposals – Lists all proposals from all menus.

In Progress – Lists only proposals that are being worked on and have not been submitted.

Submitted – Lists proposals that have been submitted and their critiques.

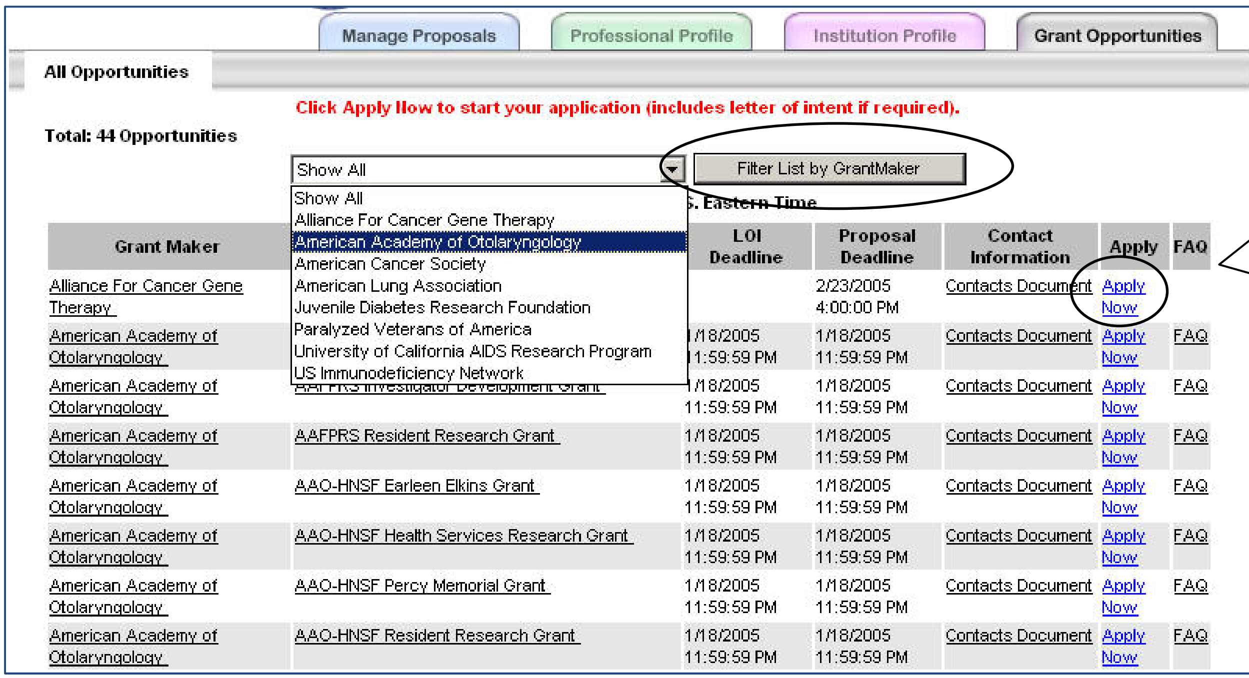
Awarded – Lists the results of submitted proposals.

Archived – Lists proposals that have been archived for storage.

Creating a Proposal

You can create a proposal in two ways: the "Create New Proposal" button under the Manage Proposals tab; or, the Grant Opportunities tab.

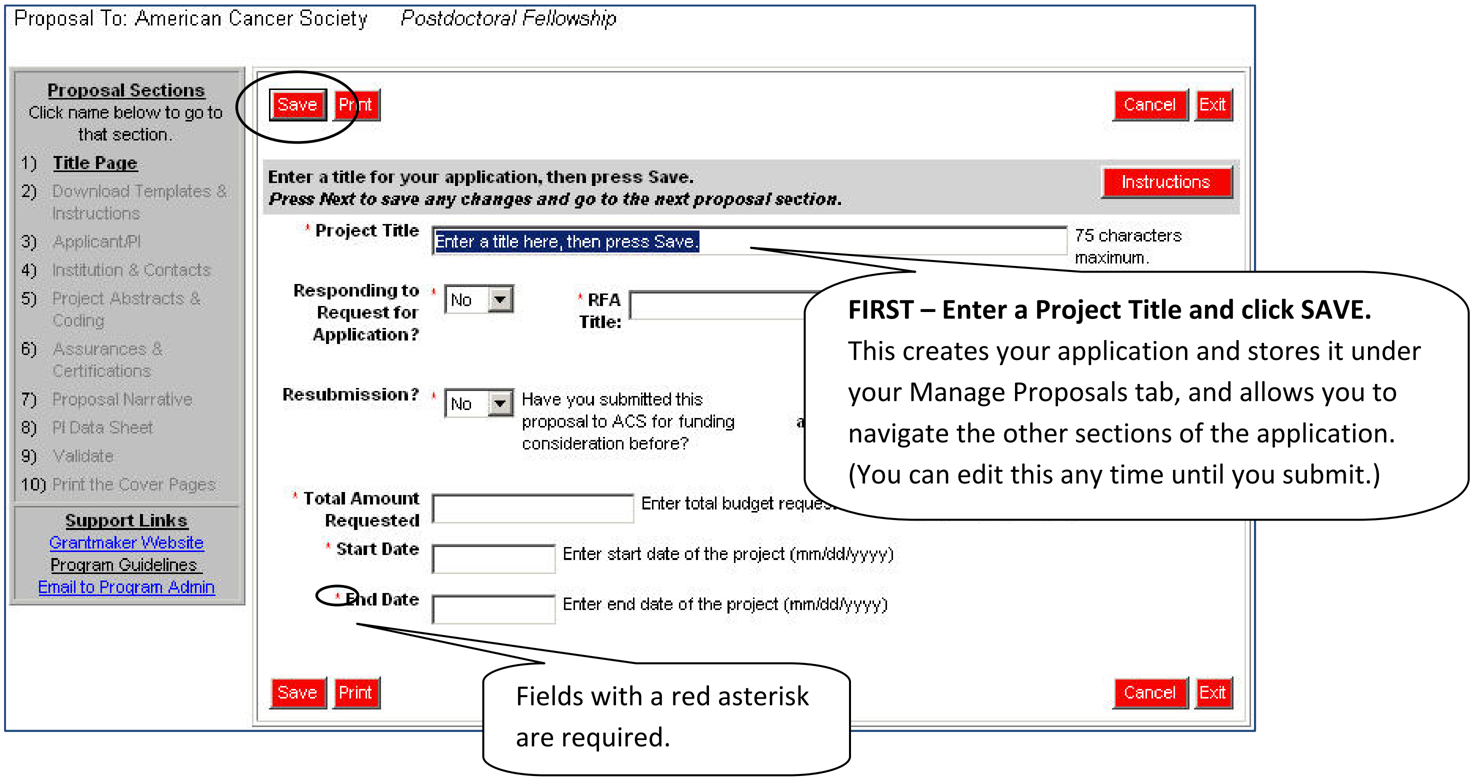
You can filter the list of grants in the list so that you can see the grants from the foundation you are interested in.



- **Apply – Click on the Apply Now link to create a proposal**
- **Grant Maker –** Links to the foundation web page
- **Programs –** Opens a copy of the Policies and Procedures for applying *(or links to grant-maker's website for information about the program)*
- **Deadlines –** The date the LOI or Proposal must be submitted
- **Contact Information –** Opens an email to the appropriate contact for the grant-maker.
- **FAQ** – Answers to many questions provided by the foundations.

Naming your Proposal

Each grant program may be configured differently, i.e., different data requirements and different application sections. The following examples are intended to illustrate the steps to completing an application. Be sure to click "SAVE" regularly.

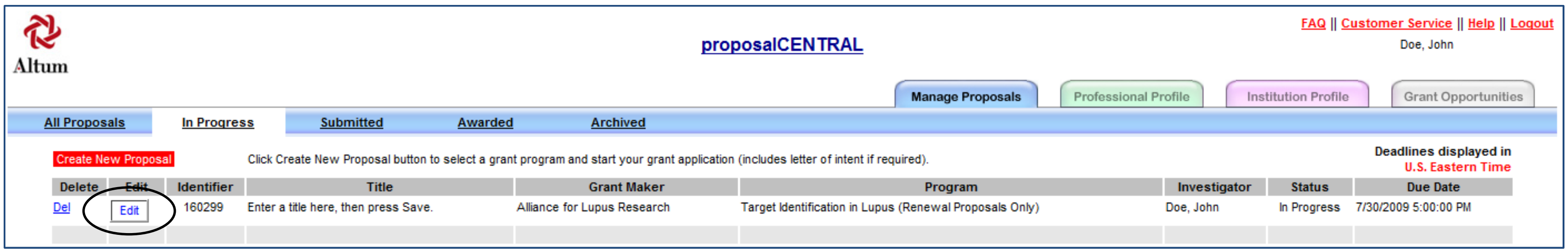


Working with your Proposal

You can “Save” your application at any time.

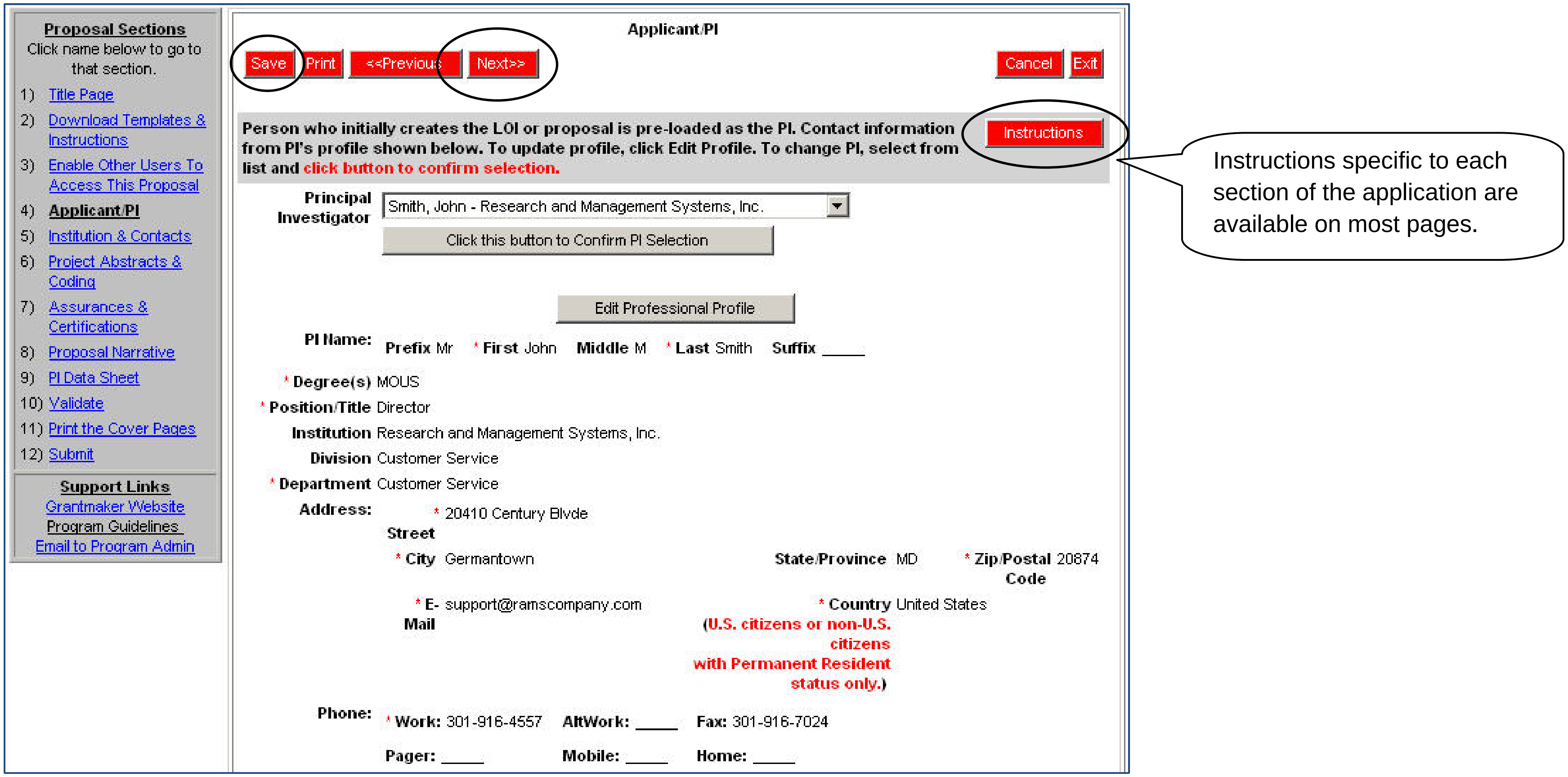
Later, when you log back in, you can find and edit your application from the “Manage Proposals” tab.

Just click on the “Edit” link to open the application that you saved.



Working with your Proposal

Click "Next" to go to the next section of the proposal (available at the top and bottom of the screen). Or, go directly to another section by clicking on the link to the section using the menu on the left hand side of the screen.



Templates and Instructions

Templates and instructions for their use are provided for you to download. It is recommended that you read the instructions before downloading the templates. You will normally need a PDF reader to read the instructions.

Proposal Sections
Click name below to go to that section.

1) Title Page
2) **Download Templates & Instructions**
3) Enable Other Users to Access this Proposal
4) Applicant/PI
5) Institution & Contacts
6) Abstract
7) Organization Assurances
8) Proposal Narrative and Other Attachments
9) PI Data Sheet
10) Validate
11) Print Signature Page(s)
12) Submit

Support Links
Grantmaker Website
Program Guidelines
Email to Program Admin

<<Previous Next>> Cancel Exit

Download	Template Type	Description	File Type	File Size
Download	Proposal Narrative	General Instructions for Using Template/Assembling Application	.PDF	141346
Download	Proposal Narrative	Instructions for Proposal Narrative	.PDF	94523
Download	Proposal Narrative	Tem... ...sal Narrative	.DOC	38400
Download	Biosketch	Instructions for Biosk...		
Download	Biosketch	Template for Biosketch		
Download	Biosketch	Sample Biosketch		
Download	Budget & Justification	Instructions for Budget & Justification		
Download	Budget & Justification	Template for Budget & Justification		
Download	Facilities & Resources	Instructions for Facilities & Resources		
Download	Facilities & Resources	Template for Facilities & Resources	.DOC	33280
Download	Key Personnel	Instructions for Key Personnel	.PDF	78720
Download	Key Personnel	Template for Key Personnel	.DOC	35840
Download	Other Support	Instructions for Other Support	.PDF	69304
Download	Other Support	Template for Other Support	.DOC	33280
Download	Consultant/Co-Investigator Letters	Instructions for Consultant/Co-Investigator Letters (If Applicable)	.PDF	70078
Download	Consultant/Co-Investigator Letters	Template for Consultant/Co-Investigator Letters (If Applicable)	.DOC	32768

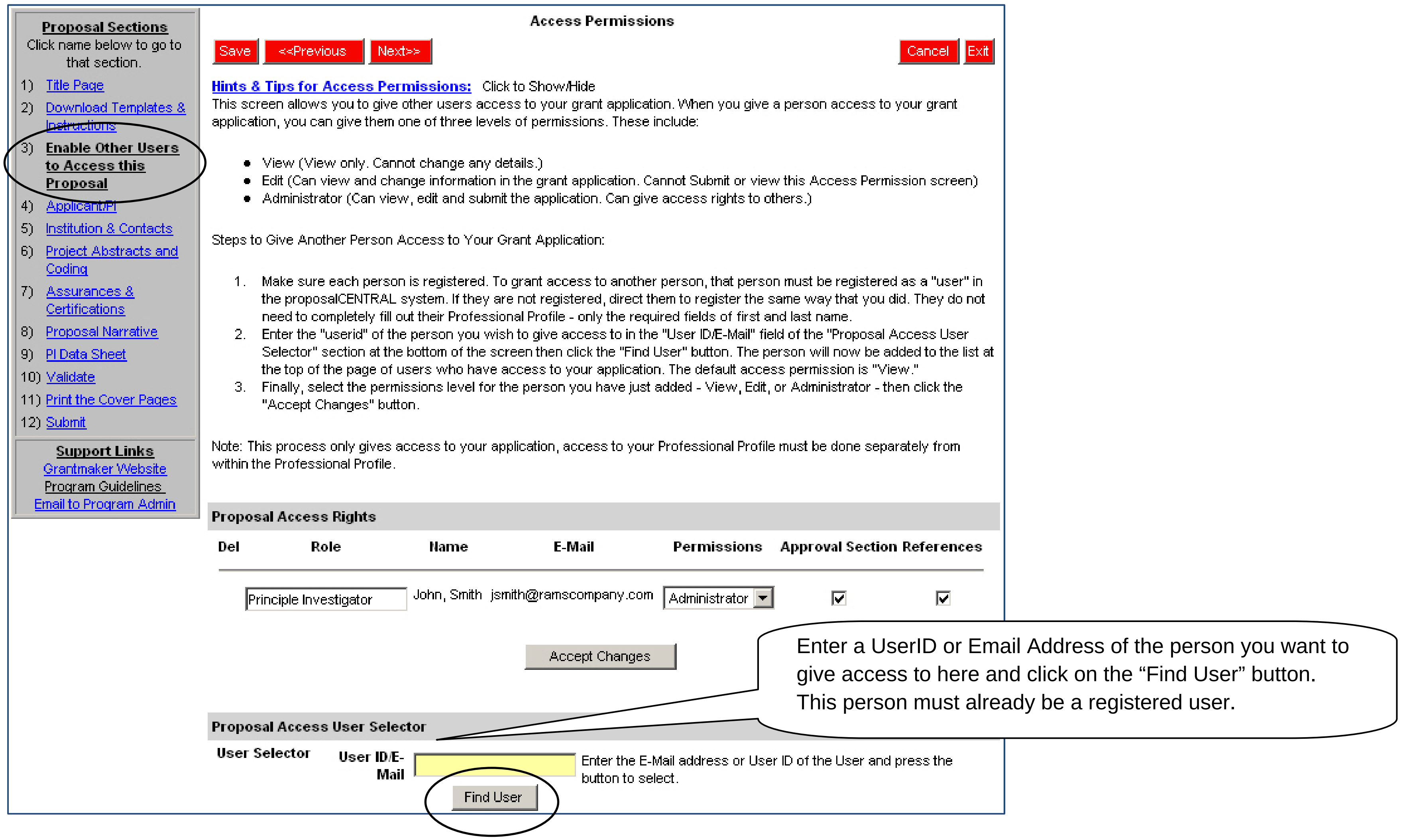
Many of the grantmakers in proposalCENTRAL request or require that applicants submit their attachments as portable document format (.pdf). Using PDFs allows you to preserve the formatting of your document. In order to save your documents as PDFs, you will need to use PDF generator software. The National Endowment for Humanities website (neh.gov) provides a sampling of PDF generators, available for both PCs and Macs, along with websites that will do the conversion for you. Many are free or very low-cost. Click here for a list of PDF generators.

Download each template to a location on your computer. You can complete these and then upload them back into the application when you are ready. Please note that most uploaded files will need to be in PDF format.

The example provided above shows a list of files with their instructions. Some foundations will provide more or less files than in this example. The instructions provide guidelines for each template on how it should be formatted and what restrictions, if any, apply.

Enabling Other Users to Access your Proposal

At times you may want to give access to other people such as collaborators, assistants or grant and contracts staff to your proposal.



Proposal Sections
Click name below to go to that section.

1) Title Page
2) Download Templates & Instructions
3) **Enable Other Users to Access this Proposal**
4) Applicant/PI
5) Institution & Contacts
6) Project Abstracts and Coding
7) Assurances & Certifications
8) Proposal Narrative
9) PI Data Sheet
10) Validate
11) Print the Cover Pages
12) Submit

Support Links
Grantmaker Website
Program Guidelines
Email to Program Admin

Access Permissions

Save | <<Previous | Next>> | Cancel | Exit

Hints & Tips for Access Permissions: Click to Show/Hide

This screen allows you to give other users access to your grant application. When you give a person access to your grant application, you can give them one of three levels of permissions. These include:

- View (View only. Cannot change any details.)
- Edit (Can view and change information in the grant application. Cannot Submit or view this Access Permission screen)
- Administrator (Can view, edit and submit the application. Can give access rights to others.)

Steps to Give Another Person Access to Your Grant Application:

1. Make sure each person is registered. To grant access to another person, that person must be registered as a "user" in the proposalCENTRAL system. If they are not registered, direct them to register the same way that you did. They do not need to completely fill out their Professional Profile - only the required fields of first and last name.
2. Enter the "userid" of the person you wish to give access to in the "User ID/E-Mail" field of the "Proposal Access User Selector" section at the bottom of the screen then click the "Find User" button. The person will now be added to the list at the top of the page of users who have access to your application. The default access permission is "View."
3. Finally, select the permissions level for the person you have just added - View, Edit, or Administrator - then click the "Accept Changes" button.

Note: This process only gives access to your application, access to your Professional Profile must be done separately from within the Professional Profile.

Proposal Access Rights

Del	Role	Name	E-Mail	Permissions	Approval	Section References
	Principle Investigator	John, Smith	jsmith@ramscompany.com	Administrator	☑	☑

Accept Changes

Proposal Access User Selector

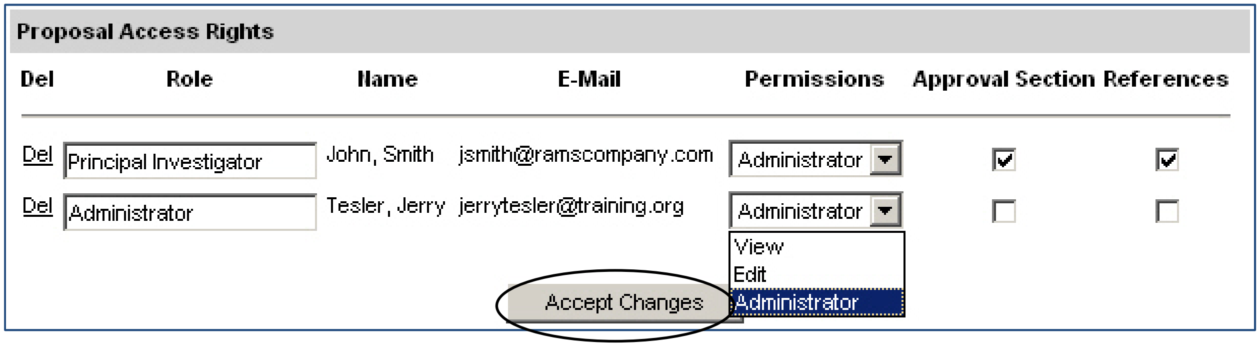
User Selector | **User ID/E-Mail** | Enter the E-Mail address or User ID of the User and press the button to select.

Find User

Enter a UserID or Email Address of the person you want to give access to here and click on the “Find User” button. This person must already be a registered user.

Enabling Other Users to Access your Proposal

Now you can assign the level of “access” for this individual. There are 3 levels of permissions: view, edit and administrator. See below for descriptions of each level of permission.



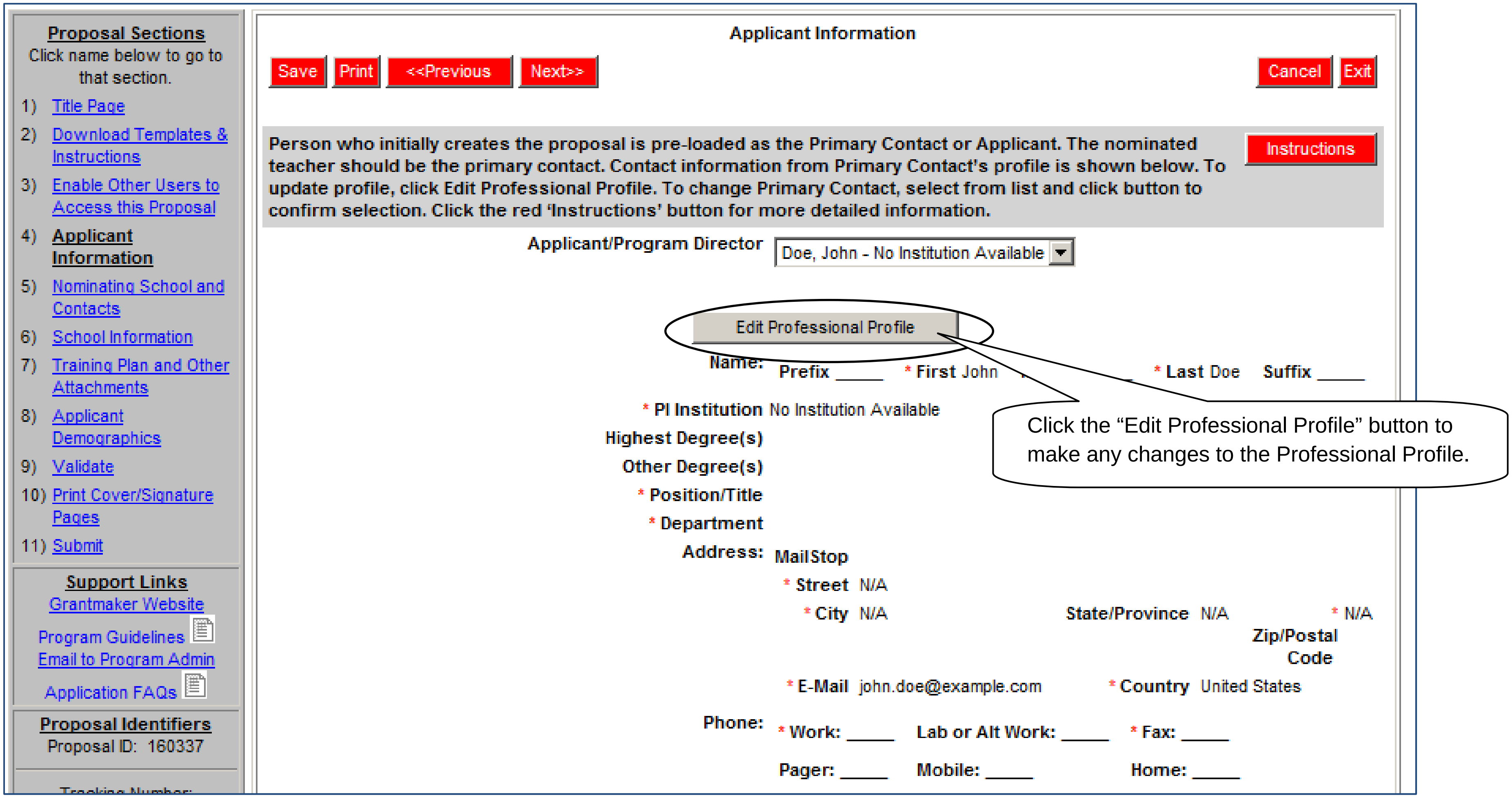
View – means that the person can only view the information in the proposal.

Edit – means that the person can view and change the details in the proposal but cannot submit.

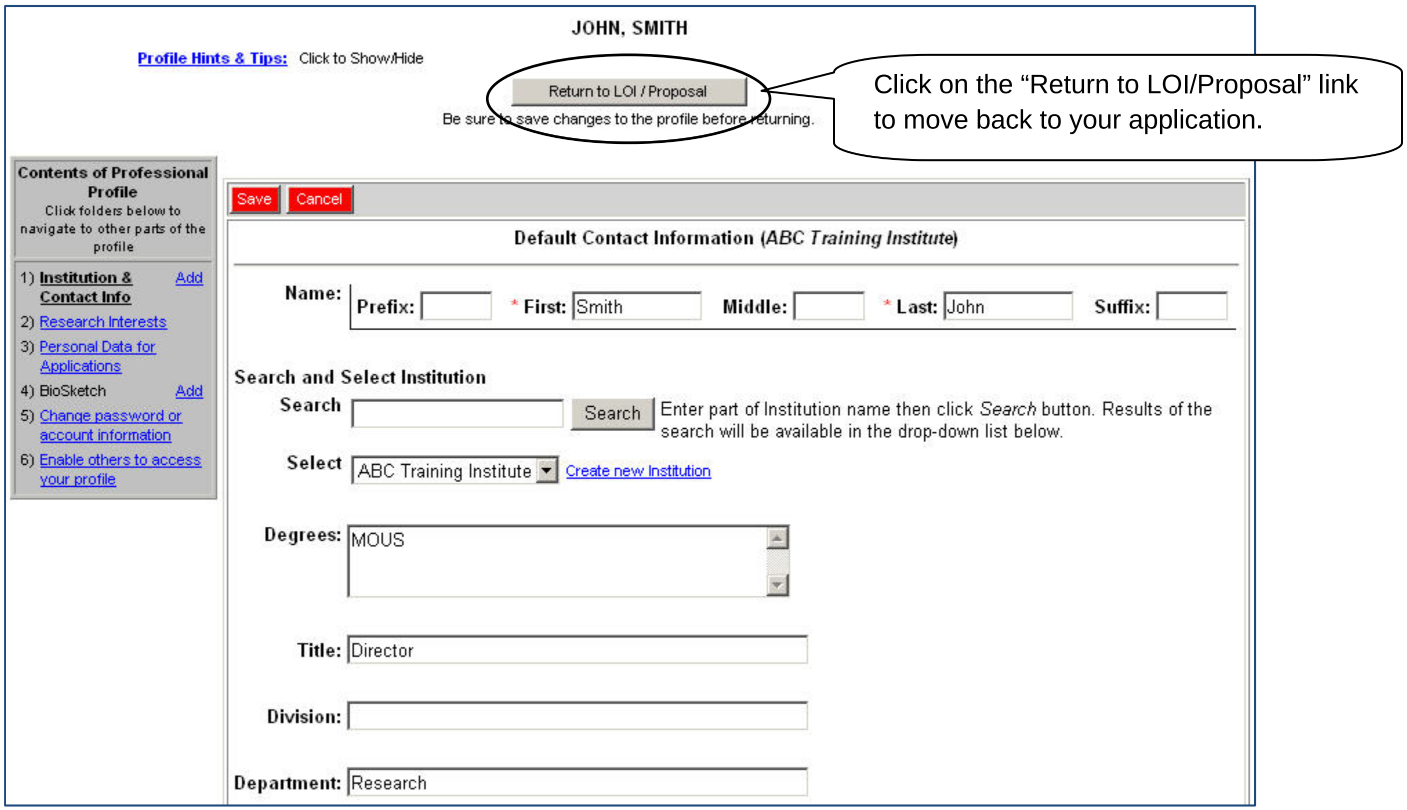
Administrator – means that the person can view, edit, and submit the proposal on the applicant’s behalf.

Once you have decided which of the access levels to assign to the person you are giving access, click on the “Accept Changes” button.

Changing the Applicant/PI Details



Changing the Applicant/PI Details



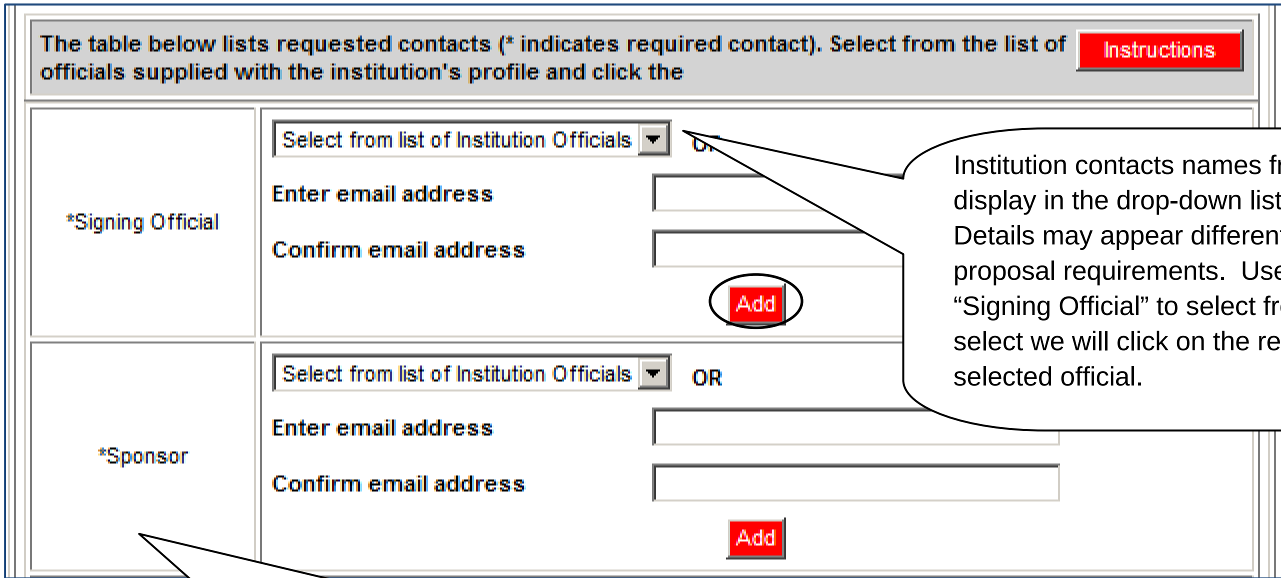
Entering your Institution Details

The top section of the Institution and Contacts page will populate based on the information setup in your Institution Profile.

You can search for and change the institution using the fields to the right of the page. Note: you will have to select this again if you created your application before selecting an institution profile in your professional profile.

The "Administrator' of the Institution Profile you selected is displayed along with their contact information.

Working with Contacts

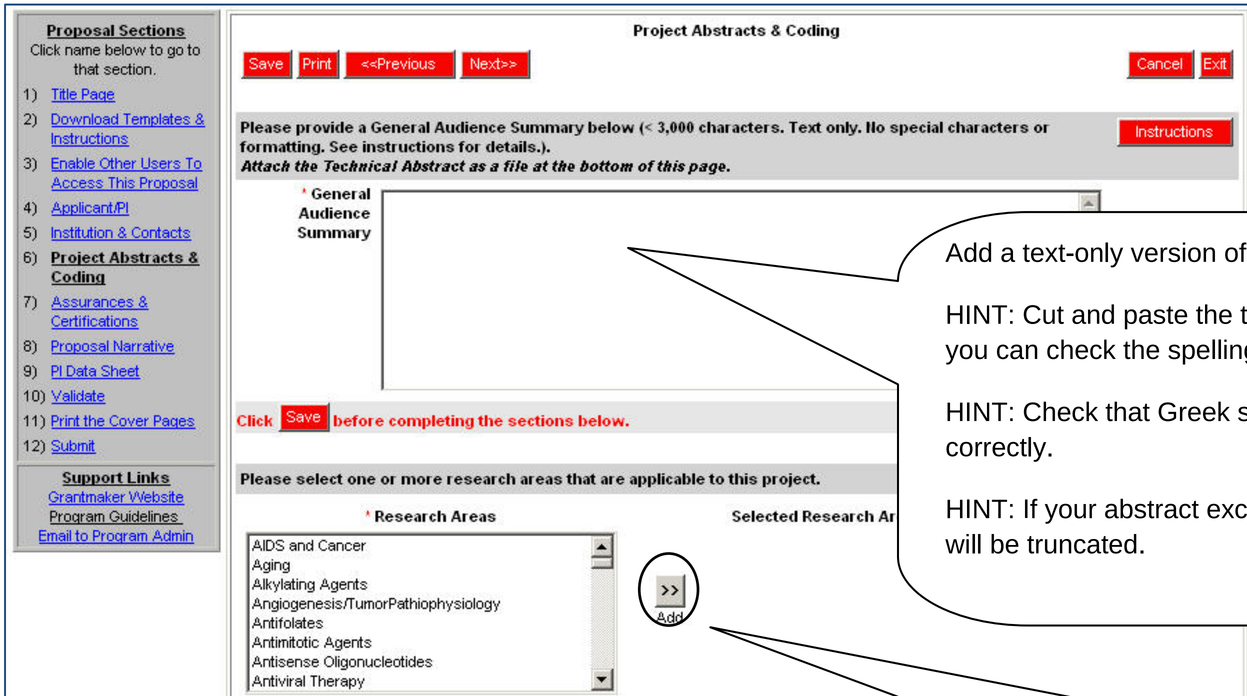


Institution contacts names from the Institution Profile will display in the drop-down list for each row in the 'Contacts table. Details may appear differently dependent upon various proposal requirements. Use the drop down arrow next to the "Signing Official" to select from the list. Once the Official is select we will click on the red "Add" button to the right of the selected official.

Required contacts, e.g., Signing Official, Financial Officer, etc., are noted with an asterisk. Information for other signatories, e.g., Department Head, Mentor, etc., may be added by clicking on the blue 'Enter Contact Information' link.

Note that the entry can be edited or removed.

Working with Abstracts and Keywords



Add a text-only version of the abstract.

HINT: Cut and paste the text from your word processor so you can check the spelling first.

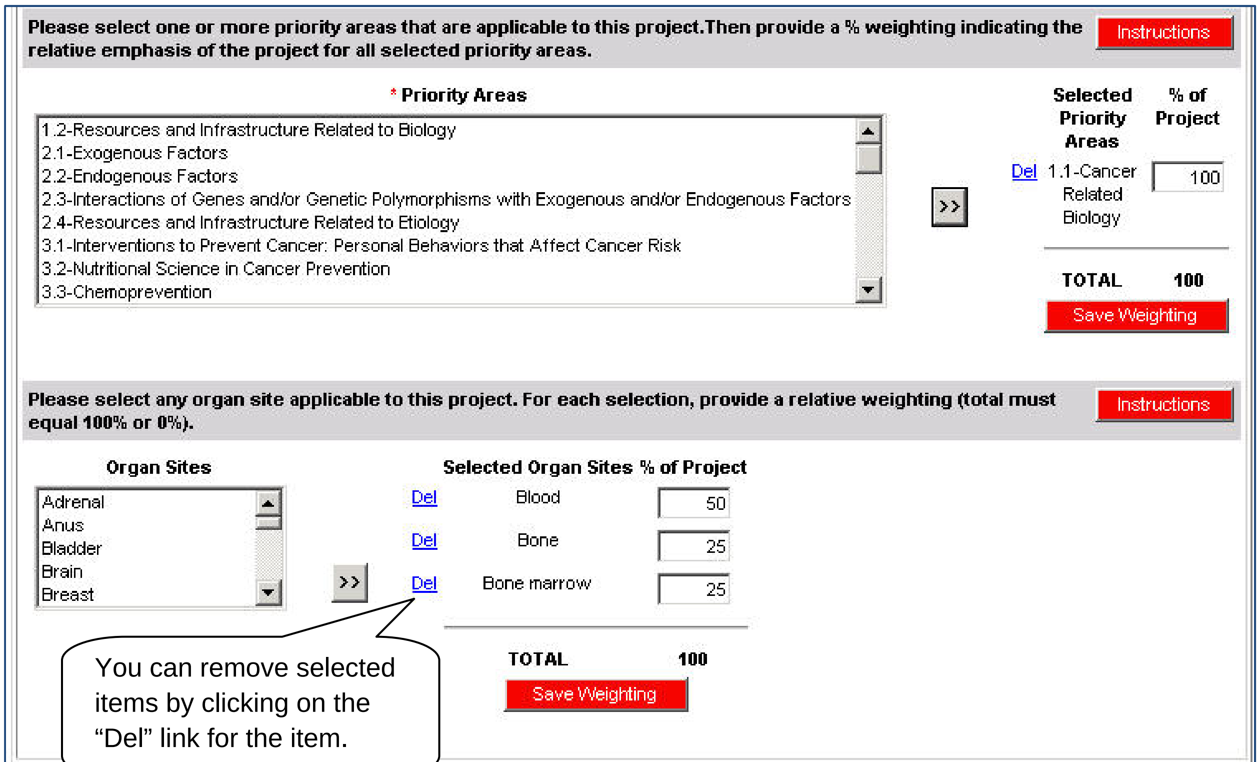
HINT: Check that Greek symbols have been spelled out correctly.

HINT: If your abstract exceeds the specified limit, the text will be truncated.

Select a keyword from the list on the left.

Then click >> to add it to the selected keywords on the right.

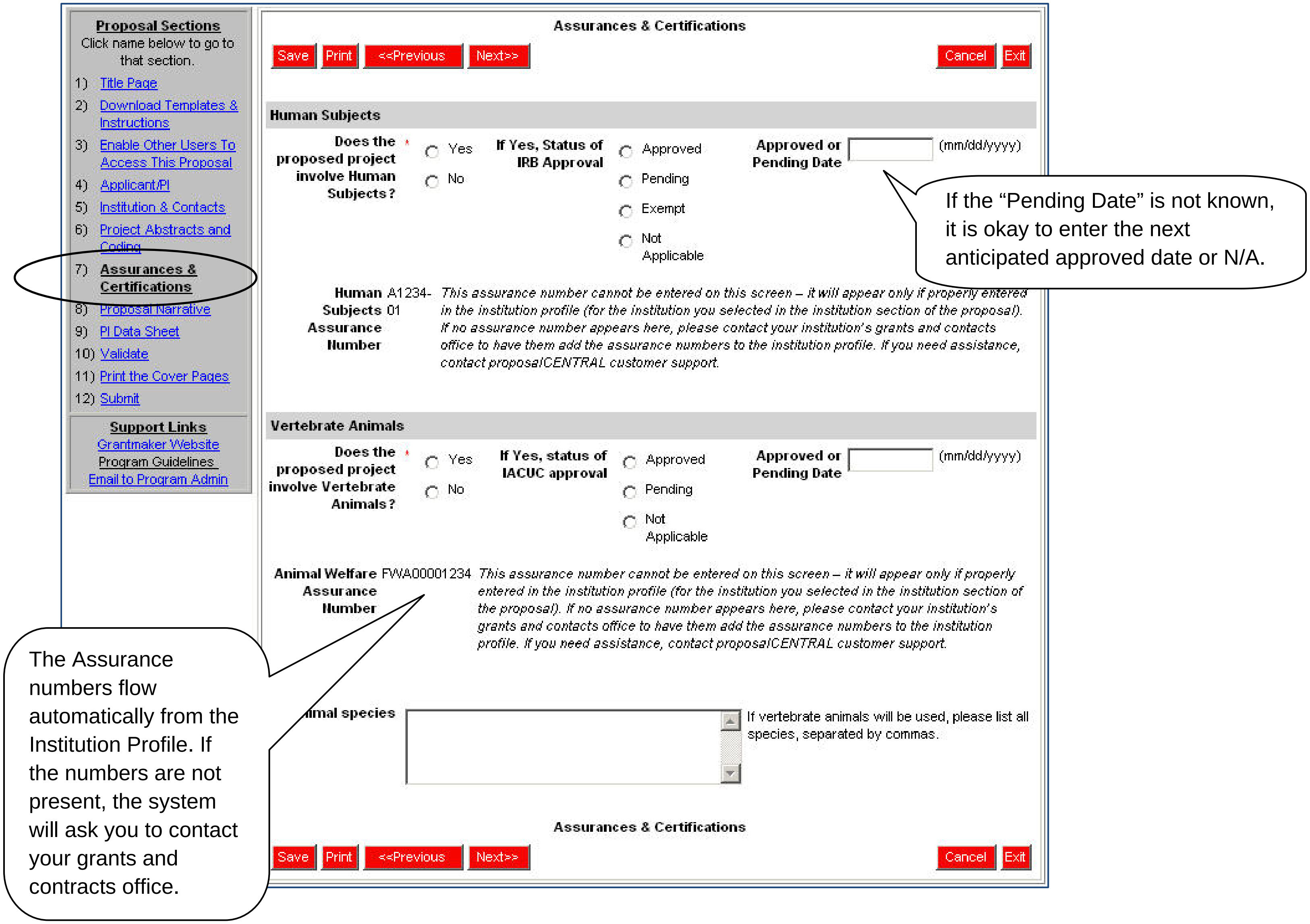
Working with Abstracts and Keywords



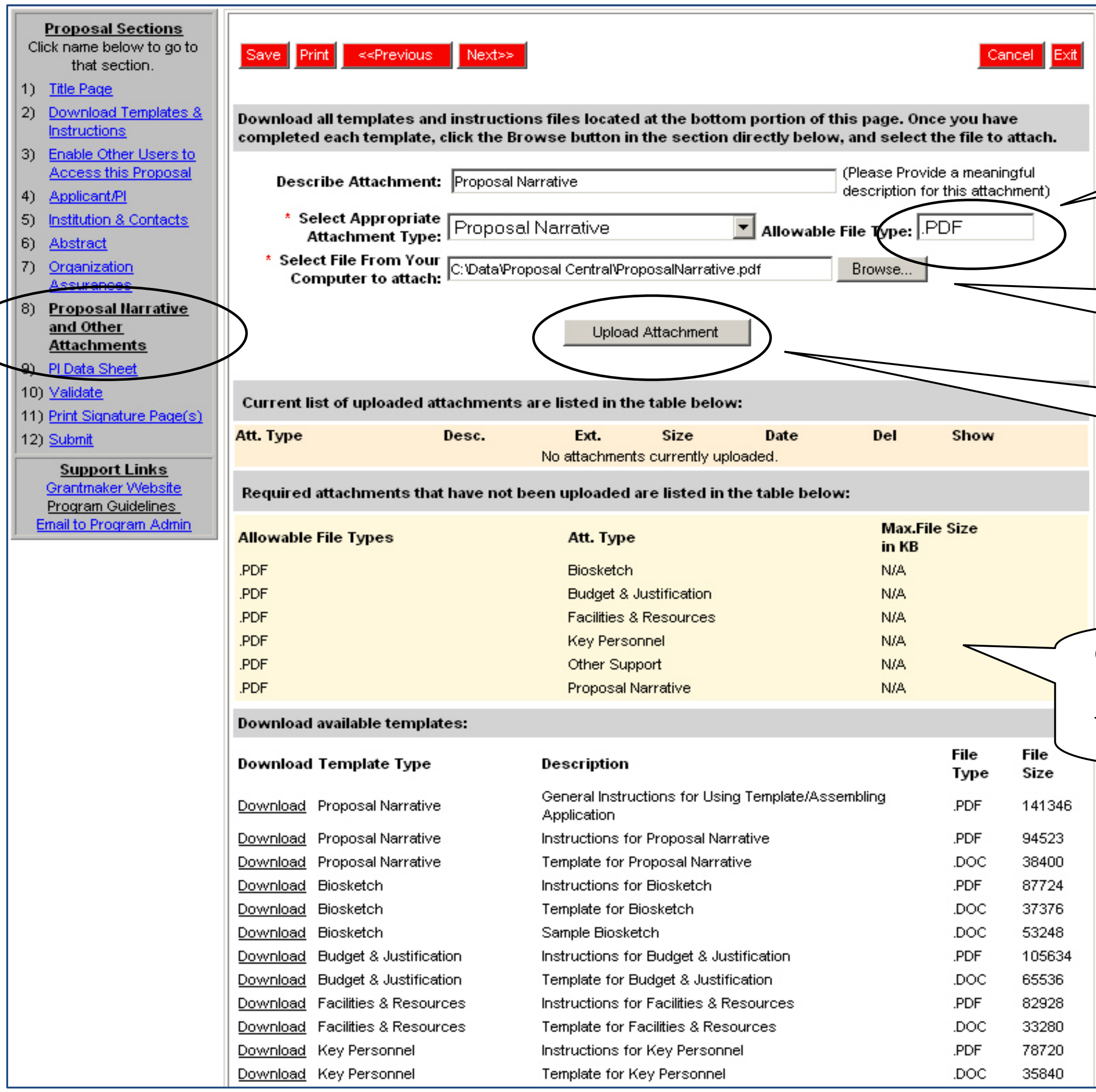
The % of project of the areas must total 100%. Click on the "Save Weighting" button to recalculate the total %.

You can remove selected items by clicking on the "Del" link for the item.

Assurances and Certifications



Uploading the Completed Templates



Supply your own description of the attached file. Make certain the proper Attachment Type is selected.

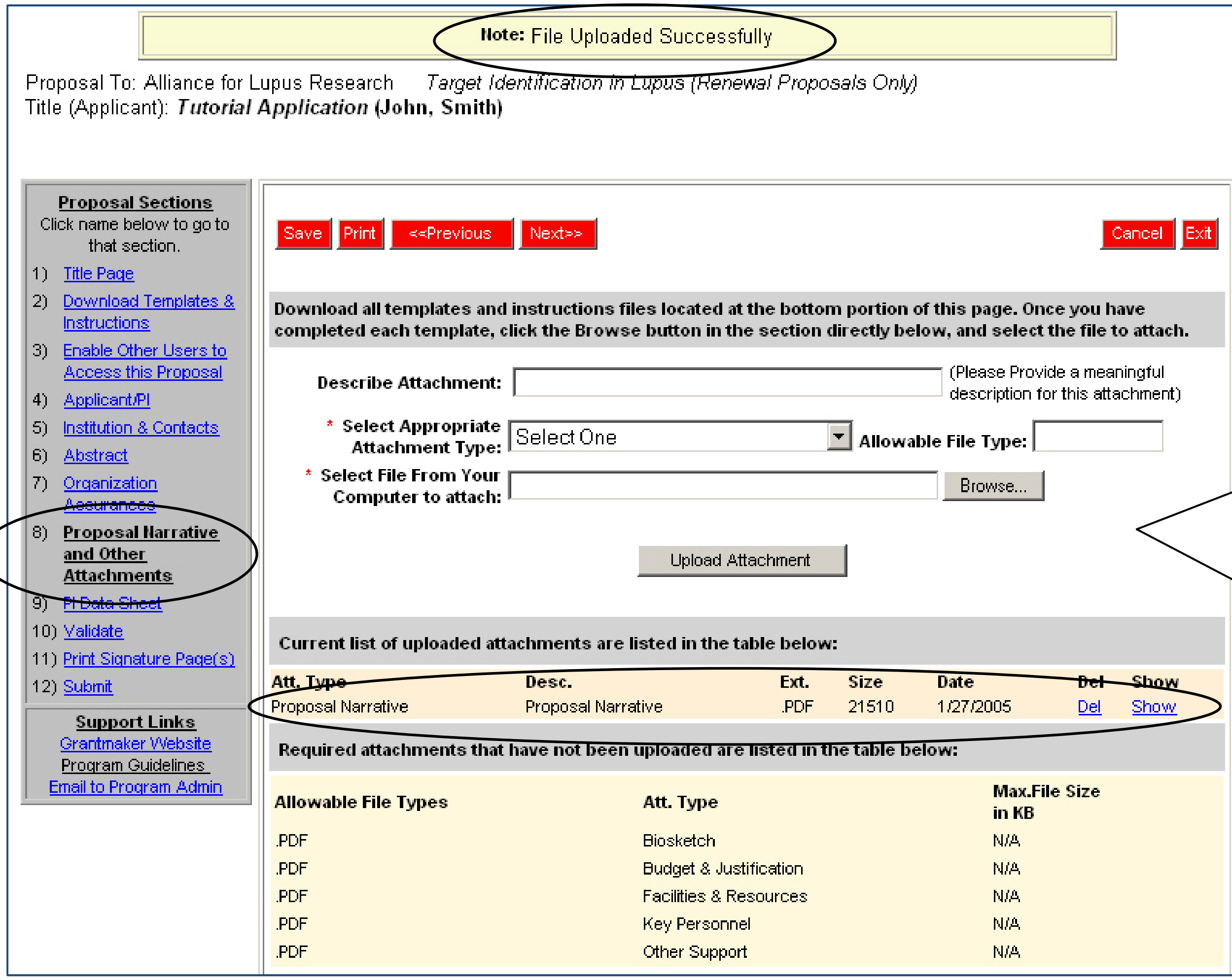
Browse for the file you wish to load. The path will appear in the window next to the “Browse” button.

Click the “Upload Attachment” button to send the file from your computer to your proposal in proposalCENTRAL.

Optional attachments do not show in this list, but an additional option may appear in the Attachment Type dropdown list.

Uploading Attachments

As with the abstract, a note appears at the top of the screen to let you know that the file was loaded successfully.



Note: File Uploaded Successfully

Proposal To: Alliance for Lupus Research *Target Identification in Lupus (Renewal Proposals Only)*
Title (Applicant): ***Tutorial Application*** **(John, Smith)**

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9) PI Data Sheet
10) Validate
11) Print Signature Page(s)
12) Submit

Support Links
Grantmaker Website
Program Guidelines
Email to Program Admin

Save | Print | <<Previous | Next>> | Cancel | Exit

Download all templates and instructions files located at the bottom portion of this page. Once you have completed each template, click the Browse button in the section directly below, and select the file to attach.

Describe Attachment: (Please Provide a meaningful description for this attachment)

* **Select Appropriate Attachment Type:** Select One **Allowable File Type:**

* **Select File From Your Computer to attach:** Browse...

Upload Attachment

Current list of uploaded attachments are listed in the table below:

Att. Type	Desc.	Ext.	Size	Date	Del	Show
Proposal Narrative	Proposal Narrative	.PDF	21510	1/27/2005	Del	Show

Required attachments that have not been uploaded are listed in the table below:

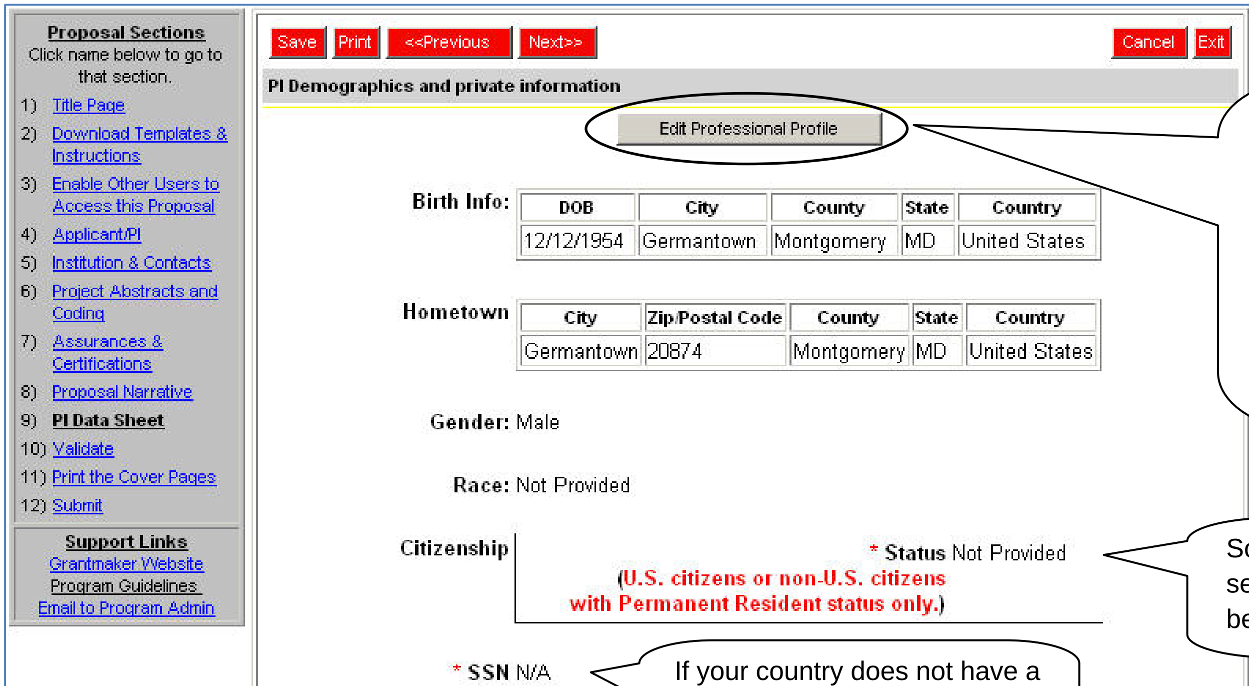
Allowable File Types	Att. Type	Max.File Size in KB
.PDF	Biosketch	N/A
.PDF	Budget & Justification	N/A
.PDF	Facilities & Resources	N/A
.PDF	Key Personnel	N/A
.PDF	Other Support	N/A

In this example we are loading the Proposal Narrative. The file moves from the middle portion of the "Current List of Uploaded Attachments" to show that the file was successfully loaded.

Repeat the process for the other completed template files. Eventually all the files from section 3 will be loaded to section 2.

Working with the PI Data Sheet

The PI Data Sheet is a special section of the application for sensitive information about the PI that won't be shown to reviewers. This information is for internal use by the grant-maker.



Most of the information in the PI Data Sheet is copied from the Professional Profile.

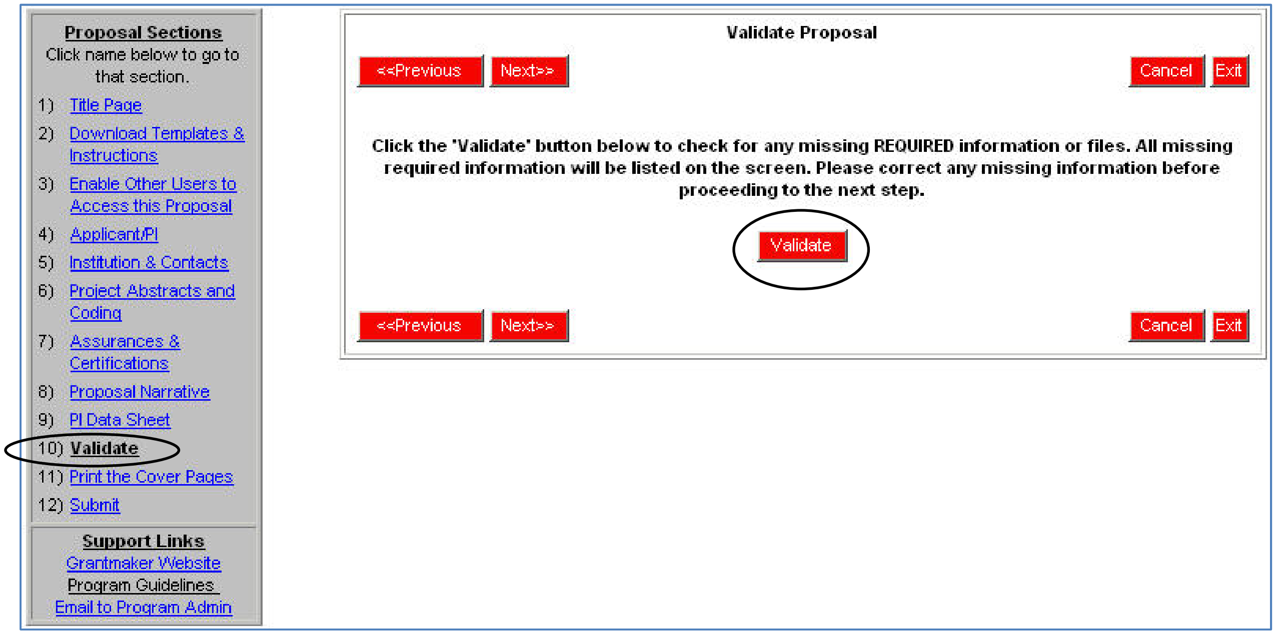
The "Edit Professional Profile" button is available to edit the details in your Professional Profile, if necessary. The click the 'Return to LOI/Proposal' button to return to the proposal.

Some fields that contain private or sensitive information have the option of being left as "Not Provided".

If your country does not have a Social Security Number, leave the field entry with "N/A".

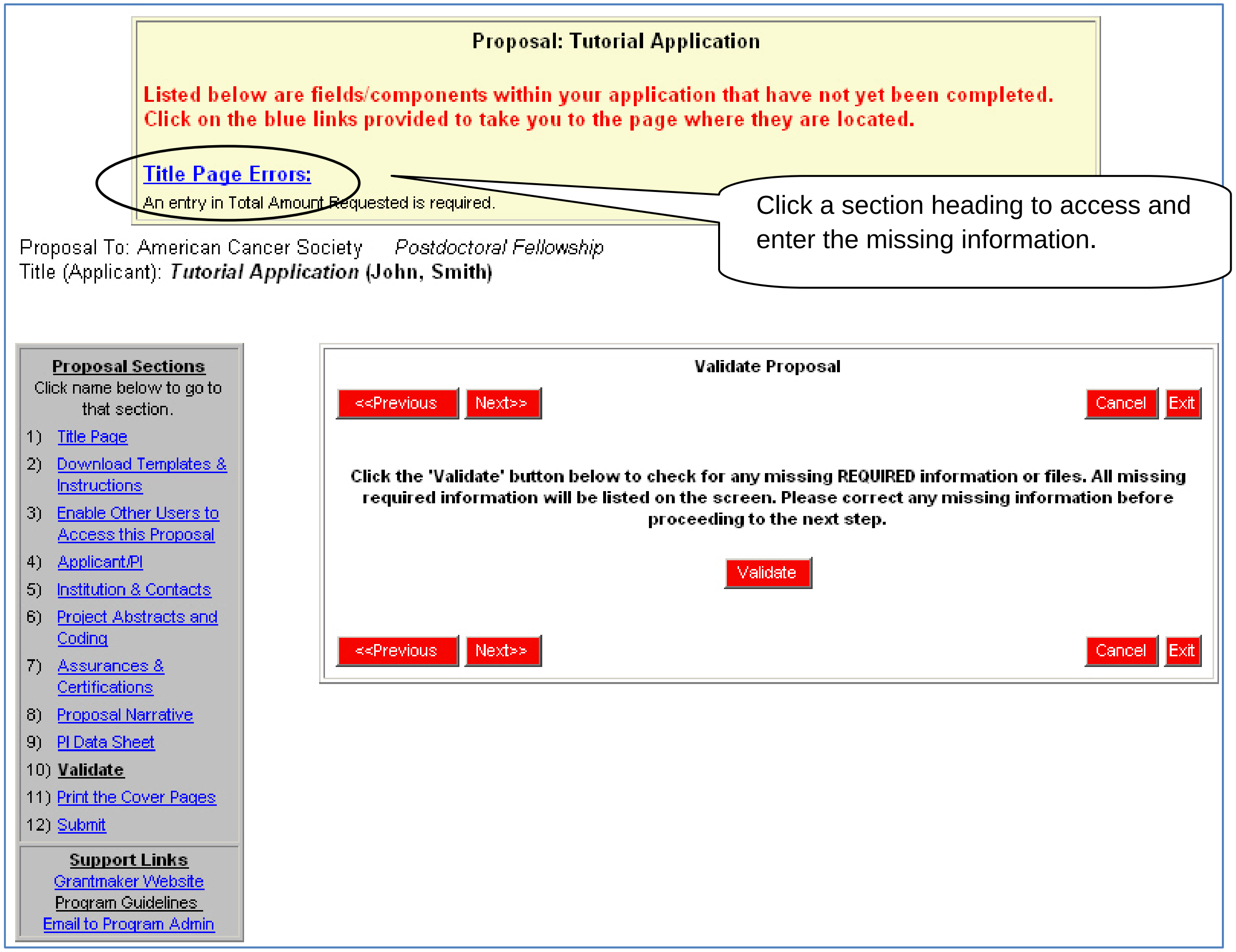
Validating your Proposal

The Validate section checks if all of the required fields are completed and all of the required files are uploaded. Clicking the "Validate" button generates a report showing that information is missing.



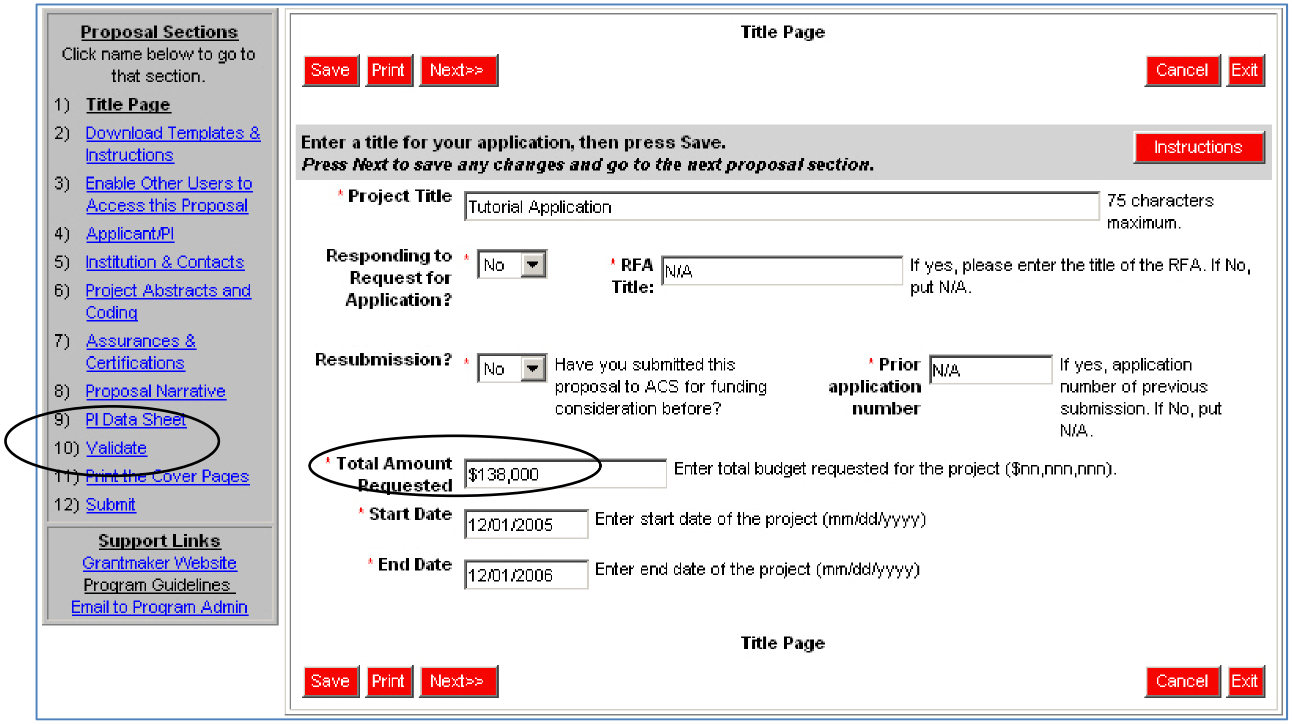
Validating your Proposal

As an example, the "Total amount requested" in the Title Page, a required field, was left blank on purpose.



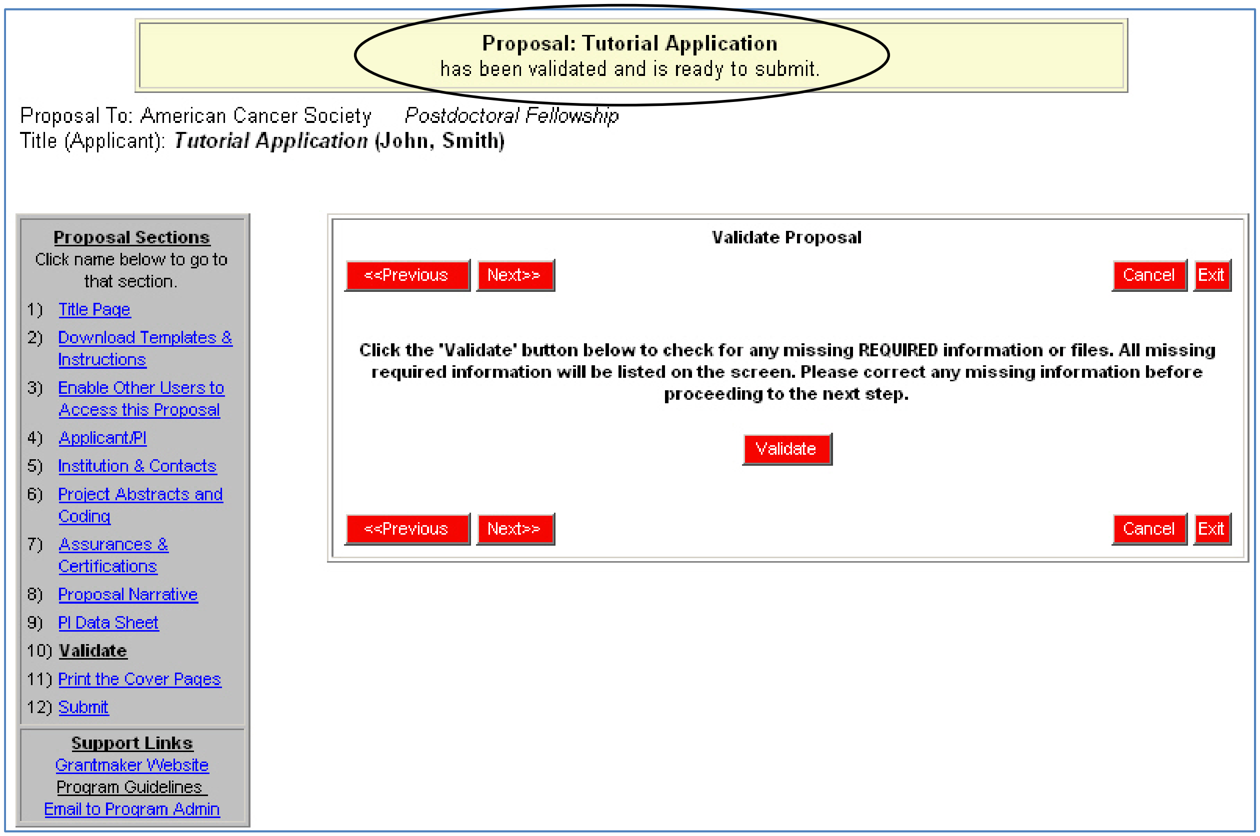
Validating your Proposal

Enter the required data and click "Validate" again.



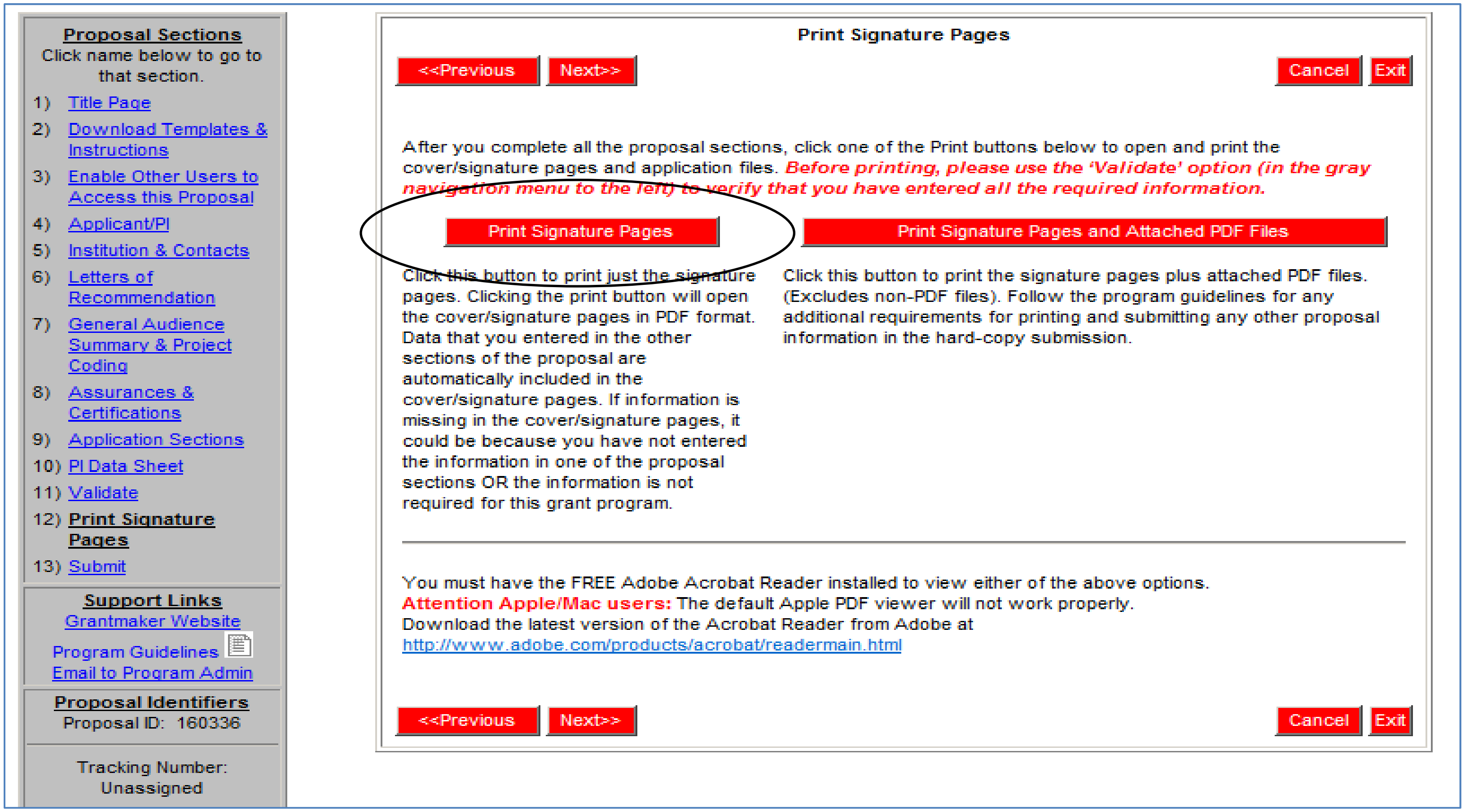
Validating your Proposal

The proposal is now ready to submit. Entries are present for all required fields and all required files have been uploaded.



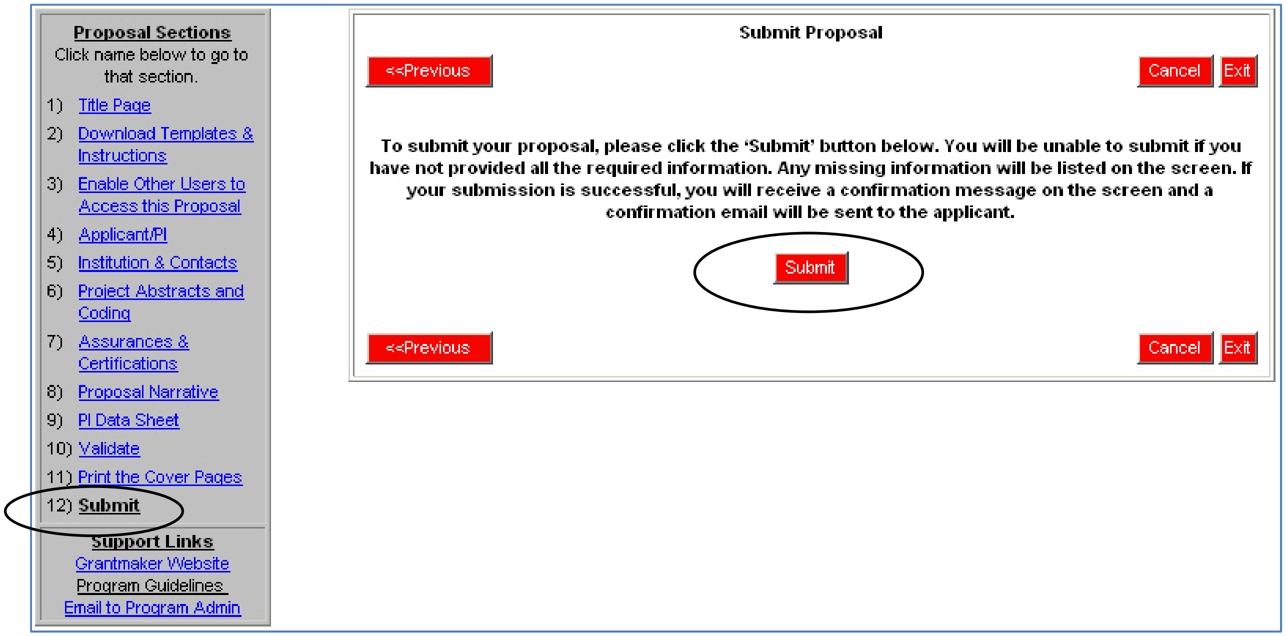
Printing the Cover/Signature Pages

Once you have completed all the proposal sections and validated the required data, you can print the signature page for your proposal. Refer to the program guidelines for the appropriate procedures. (Note: You can print the signature page if you are missing attachments.)



Submitting your Proposal

Now that everything has been completed, you will need to submit your application. Click on the submit link number 12, and then the submit button. You will get an email with a confirmation of the submission.



Submitting your Proposal

Once you have submitted you proposal a confirmation message will appear.

Congratulations on submitting a proposal using proposalCENTRAL!!

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