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Customizing the proposalCENTRAL Review System

This tutorial includes (click the section to be directed to the instructions):

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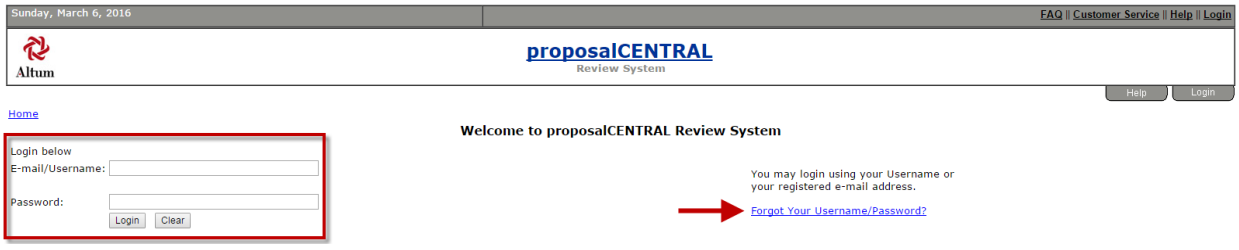
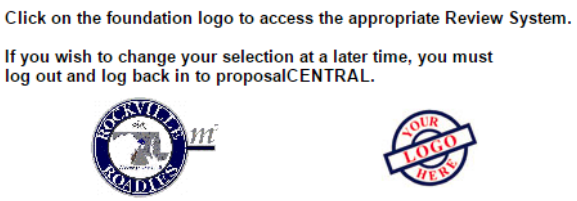
How to Access the Review System

To access the Review Module, go to https://proposalcentral.altum.com/review/login.asp. Enter your username/e-mail and your password. If you've forgotten your password, click the Forgot Your Username/Password? link found on the right. If you click the link, you will be asked to supply your e-mail address and then an e-mail will be sent to you with link to reset your password.

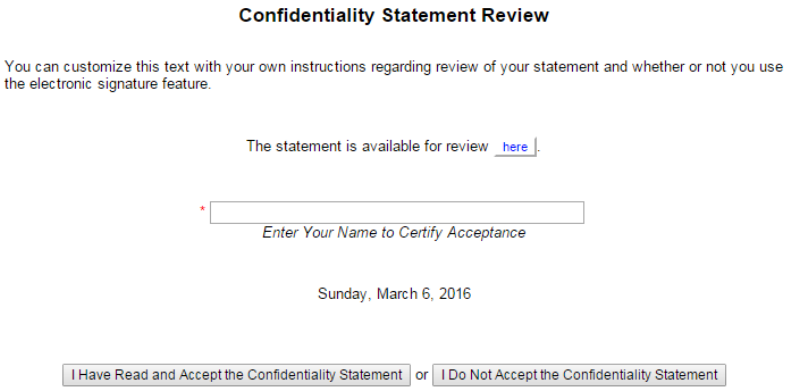


If you are a reviewer for multiple grant makers using proposalCENTRAL you'll see a logo for each. Click the logo of the grant maker you want to proceed with.



Confidentiality/Conflict of Interest Statement

Many grant makers require their reviewers to accept a confidentiality and/or conflict of interest statement either the first time or every time they access a committee. If you are prompted to do this, you'll see a screen similar to what is shown below. It will include information from the grant maker and a file to download and review. In order to proceed, you will have to click the **I Have Read and Accept the Confidentiality Statement** button. Additionally, some grant makers request an electronic signature. If this is required, you'll see a text box for you to type your name before clicking the **I Have Read and Accept the Confidentiality Statement** button.



Accessing Applications and Assignments

proposalCENTRAL allows grant makers to create very custom review processes. Therefore, what you see may be slightly different than what is shown below. Generally, you will see 3 tabs:

- **Assigned Applications**: This is the list of applications assigned to you. Depending on the current stage of the process, it may not be available yet. If you click on the tab and the grant maker has not turned it on, you'll see a message indicating that the view has not been turned on for the committee.

- **All Applications**: This is the list of all applications in the committee. Depending on the current stage of the process, it may not be available yet or it may never be made available. If you click on the All Applications tab and the grant maker has not turned it on, you'll see a message indicating that the view has not been turned on for the committee.

- **Instructions**: This will always be available. You should click on the pink tab to see if the grant maker has provided any documents that you should download.

If you have access to multiple committees for the grant maker, you'll see a committee drop-down menu below the 3 tabs. To change committees, select another committee from the drop-down menu and click the **Go** button.

Application Materials

Within both the Assigned Applications and All Applications tabs, there are several links available to help you access the application materials. Depending on the type of committee that grant maker is using, some of these links may not be currently available, but may become available later.

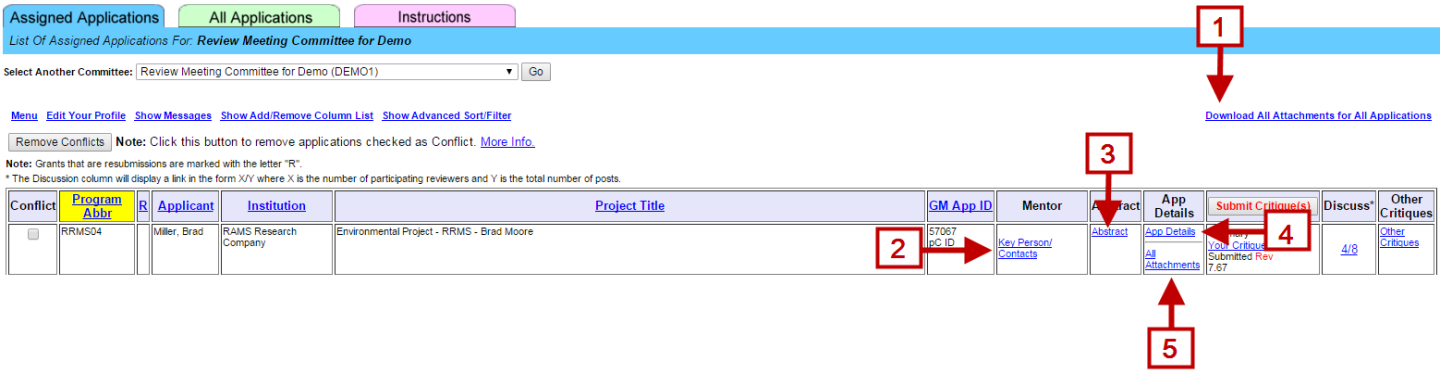
1. Above the table on the right there is a Download All Attachments for All Applications link. Clicking this link will download all Word and PDF files for all applications showing in the table. Each application will have a single PDF file that will include all Word and PDF files the applicant uploaded and some other application information. All of the files will be downloaded to a single zip file.

2. Key Person/Contacts link will open a page with all institution officials and key personnel listed in the application.

3. Abstract link will open a page showing all of the information collected in the application on the abstract page. The information collected varies from grant maker to grant maker, but typically includes lay and technical abstracts along with keywords.

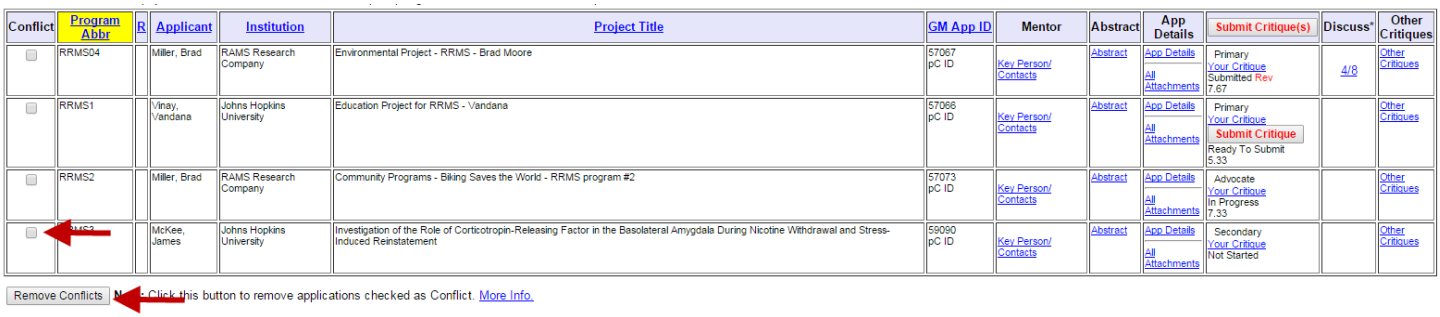
4. App Details link will open up the entire application the applicant submitted. You can review all of the sections of the application.

5. All Attachments link will provide the PDF described in #1 above, but for the individual application.



Marking a Conflict

Within both the Assigned Applications and All Applications tabs, you can mark an application as a conflict, if necessary. To do this, check the box in the Conflict column for the application and click the **Remove Conflict**s button.



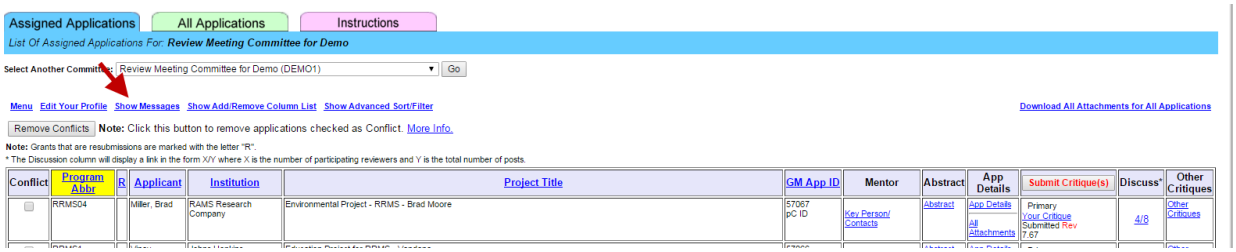
REMINDER: Refer to the instructions from the grant maker regarding what constitutes a conflict.

Customizing the Table of Applications

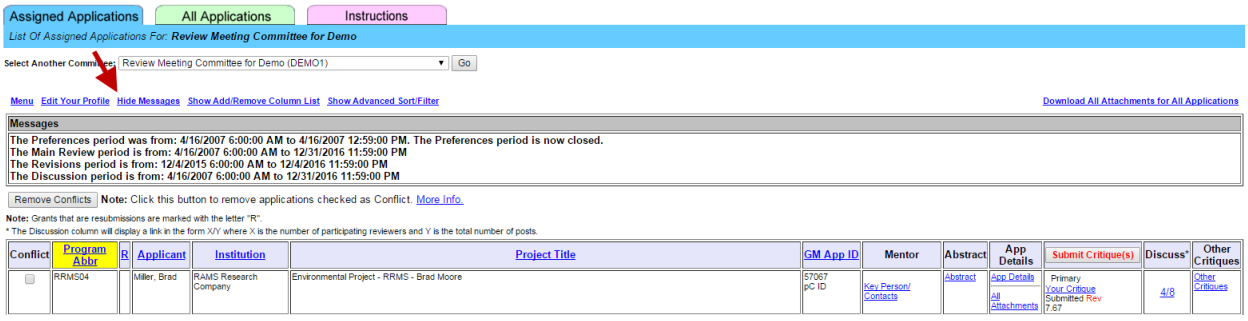
Within both the Assigned Applications and All Applications tabs, you have the ability to see deadlines for the committee, include more columns of information, and search for specific applications.

See Deadlines

In order to see the deadlines for the committee, click the Show Messages link above the table.

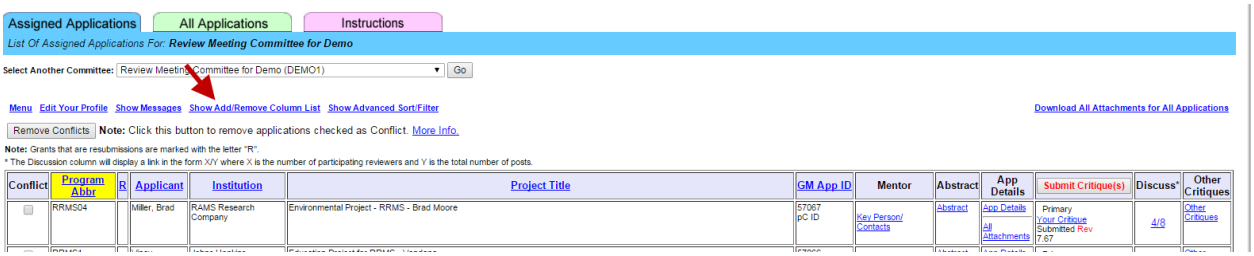


If you don't want to see the messages, click the Hide Messages link above the table.

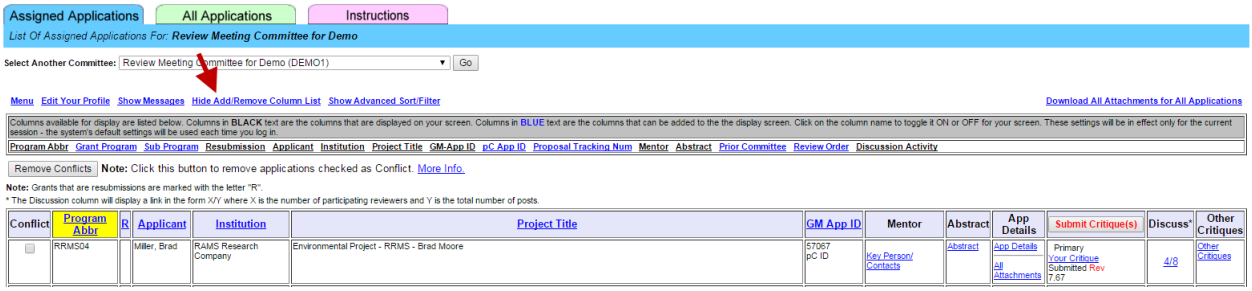


Add Columns of Data

If there is other information you want to include in the table of applications, click the Show Add/Remove Column List link above the table.

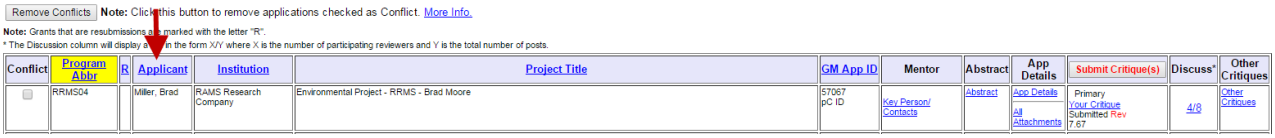


Clicking the link will open a table that lists all possible columns for you to include. The columns showing in black are already included in the table. To add a column that is showing in blue, click its name. When you're done, click the click the Hide Add/Remove Column List link above the table.

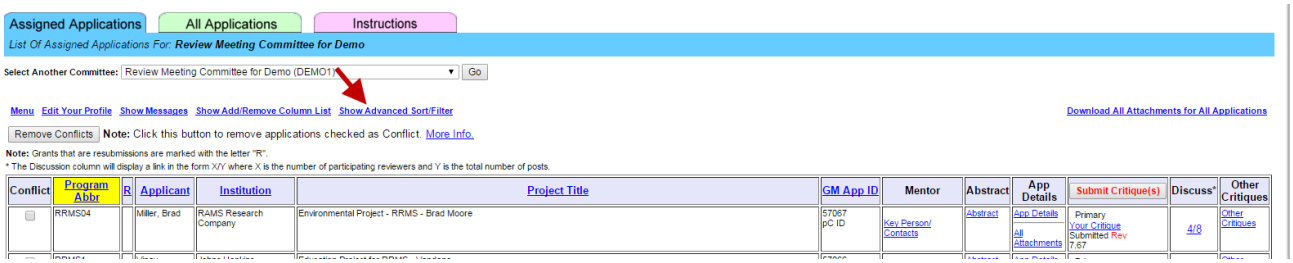


Sort and Filter Applications

To do a simple sort (e.g. sort by a single value), click the link in the column header for the column you wish to sort the table by. Not every column can be chosen for sort, but those that are available for sorting will show with a blue link in their name.



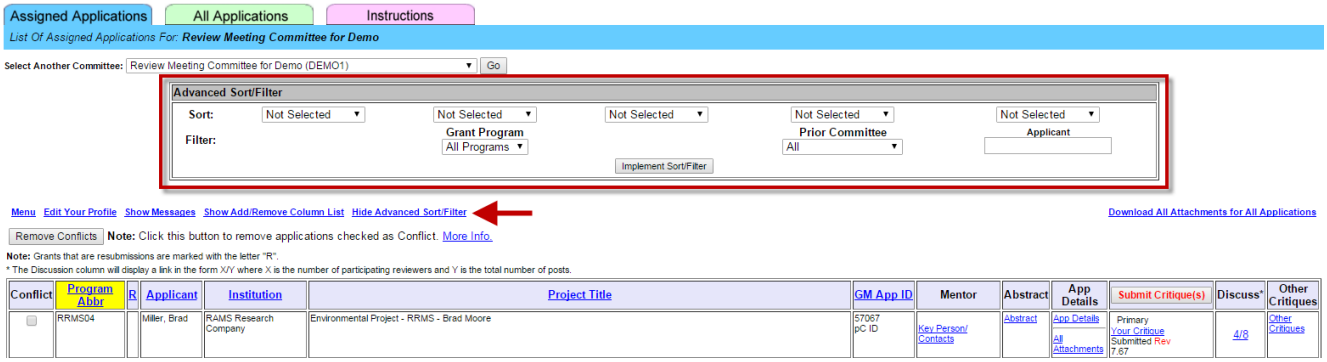
To do an advanced sort (e.g. sort by multiple values) or filter the list of applications showing, click the Show Advanced Sort/Filter link above the table.

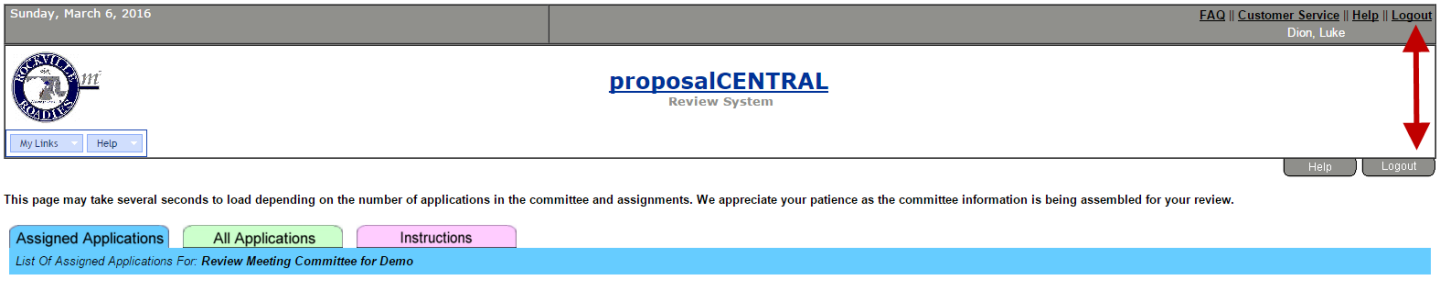


Clicking the link will open a table that allows you to elect sort and filter options. The top row includes the ability to sort by up to 5 different criteria. Each drop-down menu contains all the possible columns available for sort. The first drop-down on the left will be the primary sort (e.g. Program Abbr), the next column will be the secondary sort (e.g. Sub Program), the next column will be the tertiary sort (e.g. Applicant), and so on.

The second row includes the ability to filter the list of applications by program, prior committee (if applicable), and/or applicant.

You can sort the table without filtering, filter the table without sorting, or filter and sort the table. After making your desired customizations, click the **Implement Sort/Filter** button. When you're done, click the click the Hide Advanced Sort/Filter link above the table.



Exiting the Review Module

When you're ready to leave the Review Module, you can click either the Logout tab or the **Logout** link, both found in the upper right.