

PCORI Online Engagement Awards Cheat Sheet: Logging in & Project Management






Updated as of 10/31/17

Important Reminders

This Cheat Sheet provides guidance on:

- Logging in to PCORI Online:
 - Logging in as a New User
 - Logging in as a Returning User
- Project Management:
 - Managing Deliverables & Tasks
 - Submitting and Updating Publications
 - Submitting Notes & Attachments

Please keep in mind the following icons, user roles, and definitions:

User Role	Definition	
Save	It is important to always save your work. Make a habit of using the save button before navigating away from your current page.	
Required Field	A red vertical line at the beginning of a field indicates a required field that must be completed to save or proceed.	
Magnifying Glass	The magnifying glass indicates that a field has search capabilities , allowing you to select from related search results.	

User Role	Definition
Project Lead (PL)	Institution's primary Point of Contact (POC) throughout the lifecycle of the contract award; responsible for the programmatic conduct of the Engagement Awards project
PL Designee	An individual selected by the Project Lead (PL) to act as a backup or alternate
Administrative Official (AO)	Responsible for the proper administration of the contract , including overseeing the submission of the contract activation, contract renewals, and other required materials
Contracts Administrator (CMA)	PCORI Contracts POC for the funded project(s)
Program Officer (PO)	Primary scientific manager for Engagement Awards projects
Program Associate (PA)	PCORI staff member responsible for Program Officer support on projects

Logging into PCORI Online

The following steps provide guidance on logging in to PCORI Online.
Your User Name is the email address you use when interacting with PCORI.

Logging in as a New User

1.	Navigate to PCORI Online (https://pcori.force.com/engagement).
2.	To log-in to PCORI Online as a <i>new user</i> , click ' New User? '
3.	Enter information in the required fields (designated with a red asterisks*), and create a password.
4.	Click ' Join PCORI Portal. '
5.	Submit additional information, and click ' Submit. '
6.	You will receive an email with further instructions.
7.	From the automated email, click the link that will direct you to log-in to the PCORI Online home page.
8.	Once you log-in to PCORI Online, click the ' Engagement Awards ' button.
9.	Click on ' My Projects ' to view a list of your current projects. Click on a project title to navigate to the Project Details page. ➤ Please reach out to help@pcori.org if you have not been granted access to your project(s).

Logging in as a Returning User

1.	Navigate to PCORI Online (https://pcori.force.com/engagement).
2.	To log-in to PCORI Online as a <i>returning user</i> , enter your User Name and Password and click ' Log in. ' ➤ You may need to reset your password by clicking on ' <i>Forgot your password?</i> '
3.	Once you log-in to PCORI Online, click the ' Engagement Awards ' button.
4.	Click on ' My Projects ' to view a list of your current projects. Click on a project title to navigate to the Project Details page. ➤ Please reach out to help@pcori.org if you have not been granted access to your project(s).

Project Management

Through PCORI Online, both PCORI staff and Awardees can upload, review and share documentation and deliverables associated with various projects, contracts, and applications.

Managing Deliverables & Tasks

To view Deliverables outside of the Progress Report, navigate to the bottom of the Project Detail page to the **Milestone-Deliverables** section.

1.	From the Project Details page, navigate to Milestones-Deliverables .
2.	Open a Deliverable by clicking on the link in the Milestone-Deliverable Number column.
3.	Click ' Edit ' to update the Deliverable.
4.	Enter information in editable fields, including Status, Due Date, Projected Completion Date, Completed Date, and any Reason for Delay. Click ' Save .'
Complete Deliverable Tasks:	
5.	In the Deliverable record, navigate to the Tasks section at the bottom of the page to view Deliverable Tasks that have been assigned to you. ➤ You will be notified via email when a Deliverable Task is assigned to you.
6.	Click on the Task Name to view details, and click ' Edit .'
7.	Update the Task Status, add External Comments, and click ' Save .'

Submitting and Reviewing Publications

Awardees can submit Publications either through the Project Details page (as detailed below), or through a Progress Report. From the Project Details page, Awardees can add new Publications and edit existing records.

Submit New Publications

1.	From the Project Details page, navigate to Publications .
2.	Click ' New Publication .' All new publications are reviewed by the PCORI Librarian. ➤ Review the current list of publications prior to submitting a new publication to avoid duplicate entries.
3.	Select the record type (Journal Article, Presentation, or Other), and click ' Continue .'
4.	Enter key information into the Publication Type section, being sure to enter information into the highlighted fields.
5.	Enter key information on status, title, dates, and authors into the Primary Information section. <ul style="list-style-type: none">• If the publication is <i>submitted</i>, enter the Journal Submission Date• If the publication has been <i>accepted</i>, enter the Accepted/In Press Date• If the publication is <i>published</i>, enter the Publication Date

6.	Do not edit the Project and Progress Report fields.
7.	Click ' Save. '
8.	To upload the related Publication file, click ' Attach File ' on the newly created Publication record.
9.	Follow the prompts on the following window to attach the file.

Review Submitted Publications

1.	From the Project Details page, navigate to Publications .
2.	Open the applicable Publication record you wish to update.
3.	Review the information on the Publications Details page, and click ' Edit ' to update. ➤ <i>Published Journal Articles cannot be edited after being approved by the PCORI Librarian.</i>
4.	Click ' Save ' once updates are complete.

Submitting Notes & Attachments

*The **Notes & Attachments** section allows users to send information to PCORI via notes or attached documents. These actions can be taken on the overall Project Details page, or directly on a Deliverable record.*

Upload Attachment

1.	From the Project Details page, navigate to Notes & Attachments .
2.	Click ' Attach File. '
3.	Click ' Choose File ' to select a document from your computer, and click ' Attach File. '
4.	Click ' Done ' to save. Please note that all documents uploaded will be viewable to anyone with access to the Project or Deliverable, including others on your Project Team and PCORI staff.

Add New Note

1.	From the Project Details page, navigate to Notes & Attachments and Click ' New Note. '
2.	Click ' New Note ' to add text or communication to the Project page.
3.	Add a title and body to the Note, and click ' Save. '