Using ‘My NCBI’ and ‘My Bibliography’ Tools to Complete the NIH Research Project Progress Report (RPPR)

Prior to using the ‘My Bibliography’ tool within ‘My NCBI,’ do the following:

- Observe any NIH eRA Commons account whether you are a PI or delegate (staff or non-PI). See Part 1 instructions below.
- Obtain an NIH NCBI account by logging in through your NIH eRA Commons account. See Part 2 instructions below.

Part 1. Obtaining an NIH eRA Commons Account

If you don’t already have an eRA Commons account, you must request one from Sponsored Projects Administration (SPA). You can read the instructions at: http://spa.columbia.edu/electronic-systems/nihera-commons

Or do the following:

- For Morningside, send email request to ms-grants-office@columbia.edu
- For CUMC, send email request to grants-office@columbia.edu

Part 2. Obtaining a New NCBI Account Via Your NIH eRA Commons Login

These instructions assume you have an NIH eRA Commons account and that the password is not expired (passwords expire after 180 days). Check by logging into eRA Commons first (http://commons.era.nih.gov) and change the password if necessary.


DO NOT use the top section of the login window or the Google option; instead click on the “Sign in with NIH Login” option.
On the left side of the resulting page titled “Trust,” enter your eRA Commons User Name (not case sensitive) and Password (case sensitive), then click on “Log in.”

The resulting screen titled “Sign in via a Partner Organization” gives you a choice of: “By email” or “Link an existing NCBI account.”

Choose “By email.” Click on “Continue.”

**ALTERNATE INSTRUCTIONS:** If you **KNOW** that you already have an existing NCBI account and **have the NCBI** username and password, do not choose “By email” here. Rather Choose “Link an existing NCBI account” and insert your username and password. Then see the Appendix and follow the instructions on linking it to your eRA Commons account.

**ALTERNATE INSTRUCTIONS:** If you **KNOW** that you already have an existing NCBI account and **do not have the NCBI** username and password, see the Appendix on how to retrieve and how to reset the password; then follow the instructions in the Appendix to link it to your eRA Commons account.

**ALTERNATE INSTRUCTIONS:** If you are presented with a different set of options (e.g., “Create a new NCBI account” instead of “By e-mail,” see the Appendix and follow the instructions on creating a Username.

Your default contact e-mail address will be displayed. Click on “Continue.” The system will quickly flash through several screens.
Your NCBI account is now created (and linked to your eRA Commons account). You should see the screen titled “My NCBI.”

You can view your account settings at any time by clicking on your Username in the upper right corner.

Your “NCBI Account Settings” screen should resemble the one below.

“Login:” is your Username; in some cases your username will be your full e-mail address, and may be appended with “@era” or “@eracommons.” The entire string is your username.

“E-mail:” is your contact e-mail address and should say “(confirmed).”

**ALTERNATE INSTRUCTIONS:** If it says “(not confirmed)” see the Appendix for instructions on how to confirm. It is essential to have the PI’s contact e-mail address confirmed to be able to delegate access to others and for future processes to work properly.

“Linked Account:” must include “eRA Commons.”

**ALTERNATE INSTRUCTIONS:** If “eRA Commons” is not included as a linked account, see the Appendix for instructions on how to link. It is essential that the NCBI account is linked via your eRA Commons account to be able to complete NIH progress reports (RPPRs) that include publication citations.

Click on the “My NCBI” link in the upper right of this screen to continue.

If you are a PI you will now create ‘My Bibliography’ and delegate access to your staff. Continue with **Part 3** of these instructions.

If you are a delegate of the PI you will wait for the PI to delegate access to you (you will receive an e-mail from myncbi@ncbi.nlm.nih.gov). Continue with **Part 4** of these instructions.
Part 3: Delegating Access to ‘My Bibliography’ within ‘My NCBI’

If you are not already logged in, log into your NCBI account via your NIH eRA Commons account, following these instructions:

DO NOT use the top section of the login window or the Google option; instead click on the “Sign in with NIH Login” option.

On the left side of the resulting page titled “Trust,” enter your eRA Commons User Name (not case sensitive) and Password (case sensitive), then click on “Log in.”

On the resulting screen titled “My NCBI” find the ‘My Bibliography’ box; click on “Manage My Bibliography” within that box.
On the resulting screen titled “My NCBI – My Bibliography,” click on “Edit settings for My Bibliography.”

On the resulting screen find “Delegates” and click on “Add a Delegate.”

On the resulting screen under “Add a Delegate,” enter the delegate’s e-mail address and click on “Add Delegate” (you can only add one at a time). **REPEAT** the above for multiple delegations.

**ALTERNATE INSTRUCTIONS:** If during this process you receive a message that the delegation cannot be completed due to the PI’s e-mail address being unconfirmed, see the Appendix for further instructions.

When all delegates have been entered, you will still be on the screen titled “My NCBI – My Bibliography” and will see that the status for each delegate is “Awaiting confirmation.”
Your delegate(s) just received an e-mail from myncbi@ncbi.nlm.nih.gov inviting him/her to accept your delegation. See Part 4 for delegate instructions on how to accept the delegation.

Click on “Save.”

This completes the delegation process for the PI.

If the PI is using the same computer as the staff person to whom he/she is delegating access, close the browser completely to prevent auto-login of the PI during the next section.

Part 4: As a Delegate, Accepting the PI’s Delegation of ‘My Bibliography’ within ‘My NCBI’

If you are not already logged in, log into your NCBI account via your NIH eRA Commons account, following these instructions:

NOTE: If you are using the same computer that a PI was just using (to delegate access to you for example), be sure to close the browser completely to prevent auto-login of the PI during this section.


DO NOT use the top section of the login window or the Google option; instead click on the “Sign in with NIH Login” option.
On the left side of the resulting page titled "Trust," enter your eRA Commons User Name (not case sensitive) and Password (case sensitive), then click on "Log in."

You should be on the screen titled "My NCBI."

Open your e-mail message received from myncbi@ncbi.nlm.nih.gov (see sample e-mail below) and click on the link that begins with http://...
By clicking on the link in the e-mail you should be directed to the following screen that requests you to confirm that you wish to accept this delegation. Click on “Confirm Connection.”

**NOTE:** If you were NOT logged in to My NCBI when you clicked on the link in the e-mail, and did not end up at this screen, you should now go back to the e-mail and click the link again.

This completes the delegation acceptance.

**NOTE:** There will be no feedback after clicking on “Confirm Connection.” But if you go back to that screen and click on it again it will state “This delegation request has already been accepted.”

You should now be at the main screen for “My NCBI – My Bibliography.”

You are still in YOUR account (as a delegate) so YOUR bibliography likely contains no items (like the screen shown below).

See Part 5 for accessing and using the ‘My Bibliography’ tool of ‘My NCBI.’
Part 5: As a PI or Delegate, Accessing/Editing the PI’s ‘My Bibliography’ within ‘My NCBI’

If YOU (delegate) are not already logged into YOUR NCBI account (via YOUR NIH eRA Commons login):

DO NOT use the top section of the login window or the Google option; instead click on the “Sign in with NIH Login” option.

On the left side of the resulting page titled “Trust,” enter your eRA Commons User Name (not case sensitive) and Password (case sensitive), then click on “Log in.”

You should be on the screen titled “My NCBI.”
IF YOU ARE THE PI: Find the ‘My Bibliography’ box (it may not currently contain any citations). In the lower right of the ‘My Bibliography’ box, click on “Manage My Bibliography.” Below is an example of a PI screen.
**IF YOU ARE THE DELEGATE**: Find the “Collections” box. Find the link to the bibliography of the person from whom you have accepted delegation. Click on the specific link and the bibliography for that person will be available to you to create/edit.

Below is an example of a delegate screen:

![Delegate Screen Example](image1)

On the resulting page use the “Add citation” button to load citations of various types of publications. You can import directly from PubMed or add manually.

Click on “My Bibliography help” on the top right of the screen for instructions on how to use this ‘My Bibliography’ tool. Two examples are shown below.

![My Bibliography Example](image2)

Importing from PubMed
140 publications are now in Dr. Georgieff’s ‘My Bibliography.’

Click on “Add citation” to manually add a book chapter (for example).
You will see “Citation added successfully” after each addition.

Click on “Display Settings” to see options for viewing the bibliography.

Award view is only available to eRA Commons users who have active grants in their portfolios. The icon verifies that an eRA account has been linked to a My NCBI account.
Using Award view, see examples below of publications and corresponding levels regarding compliance with the NIH Public Access Policy

<table>
<thead>
<tr>
<th>My Bibliography Code</th>
<th>RPPR Code</th>
<th>What it Means</th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Complete</td>
<td>- Has a PMCID</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Compliant with policy; no further action needed.</td>
</tr>
<tr>
<td></td>
<td>In Process at NIHMS or PMC Journal – in Process</td>
<td>- Has an NIHMS # or has been submitted directly to PMC by journal.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- OK for RPPR but watch until PMCID assigned.</td>
</tr>
<tr>
<td></td>
<td>Non-Compliant</td>
<td>- Non-Compliant</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- No PMCID and not in NIHMS or has NIHMS# but is too old; not OK for RPPR.</td>
</tr>
<tr>
<td></td>
<td>N/A</td>
<td>- Compliance cannot be determined.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Click Edit Status or Add Award to provide more information.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Note that it will then turn to non-compliant or NA.</td>
</tr>
</tbody>
</table>

This publication was published in 2007 and therefore not subject to the NIH PA policy. It is coded NA.

This article has been published and has its requisite PMCID number. It is coded green (complete)

This publication is in process at NIHMS and therefore compliant. As soon as the PMCID number is assigned, it will show up here and will change to green (complete)
The NIHMS number for this publication is too old and therefore non-compliant. Must figure out why it never made it through the system to obtain a PMCID number (click on the NIHMS#) and correct prior to citing on an RPPR. This may take days or weeks.

There is not enough information in the system for it to make a determination on compliance. Click on Edit Status and respond to questions. When finished code will change (final code dependent on answers to questions).

Clicking on “Add or delete award” beneath a citation allows you to associate/disassociate funding with that publication. A pop-up window consisting of two tabs will appear: “Awards” and “Search/Add Other Awards.” Check an award to associate it with the publication, then click on “Save.”

The “My awards” section of the “Awards” tab provides the list of awards associated with your eRA Commons profile. The “Other awards” section displays those awards that are not associated with your eRA Commons profile, but have been linked to citations in your ‘My Bibliography’ collection.
Citing publications in Dr. Georgieff’s next progress report (RPPR). Under question C.1 (Are there publications or manuscripts accepted for publication in a journal or other publication (e.g., book, one-time publication, monograph) during the reporting period resulting directly from this award?” Click on “Yes” to connect to his ‘My Bibliography’

Click on the checkbox for each publication that resulted during the year on which you are reporting. Click on “Save” when done to refresh the report. (Note, this is for instructional purposes only and does not reflect actual publications associated with this particular grant.)
Below is the resulting screen after clicking on “Save.”
Appendix

SCENARIO 1: If you already have an NCBI account but do not have the NCBI username and/or password.

Click on the “Forgot username or password?” link.

Enter your e-mail address and click on “Reset password”

Below is the confirmation pop-up. Click on “OK.”

Follow the instructions provided in the e-mail that you will receive (see example below) to set a new password.
By clicking on the link you should be directed to the screen below. Enter a new password in both boxes (replace what may be pre-filled). Passwords must be at least 6 characters and are case sensitive. Click on “Set New Password.”

Below is the confirmation pop-up. Click on “OK.”

Sign in using your NCBI Username and new Password.

See below on how to link your NCBI account to your eRA Commons account.
SCENARIO 2: If you already have an NCBI account and have the NCBI username and/or password, but need to link to your eRA Commons account.


Sign in with your NCBI username and password (not your eRA Commons username and password).

![Sign in to NCBI](image1)

You should see the screen titled “My NCBI.”

View your account settings by clicking on your Username in the upper right corner.

![My NCBI](image2)

Your “NCBI Account Settings” screen should resemble the one below.

“Login:” is your Username; in some cases your username will be your full e-mail address, and may be appended with “@era” or “@eracommons.” The entire string is your username.

“E-mail:” is your contact e-mail address and should say “(confirmed).”

**ALTERNATE INSTRUCTIONS:** If it says “(not confirmed)” see SCENARIO 3 in this Appendix for instructions on how to confirm. It is essential to have the PI’s contact e-mail address confirmed to be able to delegate access to others and for future processes to work properly.

“Linked Account:” may be “None,” “Google,” “Columbia University,” or “eRA Commons.” If it does not include “eRA Commons” click on the “Change” button.
On the resulting screen under “Login Account Options” scroll to and click on “NIH & eRA Commons”.

By clicking on the NIH & eRA Commons link you will be directed to the resulting screen; login using your eRA Commons username and password.

You will be returned to the “Linked Accounts” page and it should now indicate “eRA Commons” under “Your Linked Accounts.” Click on “Return to your Account Settings page.” There is no reason to link other partner accounts.
Your Account Settings page should resemble the example below:

Click on the "My NCBI" link in the upper right of this screen to continue.

SCENARIO 3: If your “Account Settings” page indicates that your e-mail address is “not confirmed.”

When signed in, view your “Account Settings” by clicking on your user name in the upper right corner of any NCBI screen. In this example the “Email:” has not yet been confirmed. Click on “Request a confirmation e-mail.”

Follow the instructions provided in the e-mail that you will receive (see example below).

The resulting screen should indicate “Email address confirmed.”
Your Account Settings page should resemble the following. [Yours may not include the Password and Security Question—these items are dependent on how your original account was requested.]

**SCENARIO 4:** If during the first time you log in via your eRA Commons account your option is to “Create a new NCBI account” instead of “By e-mail.”

Your screen will resemble the one below.

Create a Username (can be your e-mail address if you like or anything else). Note that it may include, by default, “@era” or possibly “@eracommons” at the end. The entire string is your NCBI username. You will likely never need to use it as you will continue to login using your eRA Commons username and password.

Click on “Continue.”
Your account is now created (and linked to your eRA Commons account). You should see the screen titled “My NCBI.”

You can view your account settings at any time by clicking on your Username in the upper right corner.

Your “NCBI Account Settings” screen should resemble the one below.

“Login:” is your Username; in some cases your username will be your full e-mail address, and may be appended with “@era” or “@eracommons.” The entire string is your username.

“E-mail:” is your contact e-mail address and should say “(confirmed).”

**ALTERNATE INSTRUCTIONS:** If it says “(not confirmed)” see SCENARIO 3 in this Appendix for instructions on how to confirm. It is essential to have the PI’s contact e-mail address confirmed to be able to delegate access to others and for future processes to work properly.

“Linked Account:” must include “eRA Commons.”

**ALTERNATE INSTRUCTIONS:** If eRA Commons is not included as a linked account, see SCENARIO 2 in this Appendix for instructions on how to link. It is essential that the NCBI account is linked via your eRA Commons account to be able to complete NIH progress reports (RPPRs) that include publication citations.

Click on the “My NCBI” link in the upper right of this screen to continue.