# **CRS - CONTRACT & RESEARCH SYSTEM:**

# **FINDING DOCUMENTS**

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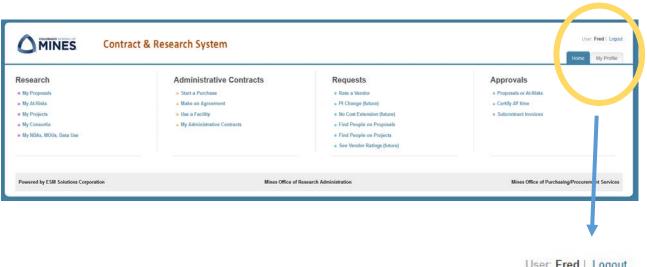
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# Getting Started: Home Page

## CRS is found on the web at: crs.mines.edu



#### Home page



From anywhere in CRS, the Home Tab appears and can be clicked to return to this screen.

# **CRS Home Page**



#### **Documents**

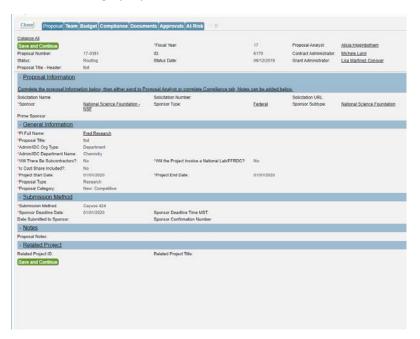
CRS easily lets the user find documents related to Proposals, Projects, At-Risks, Consortia, and more. All related documents are found within the relevant record.

### **View Proposal Documents**

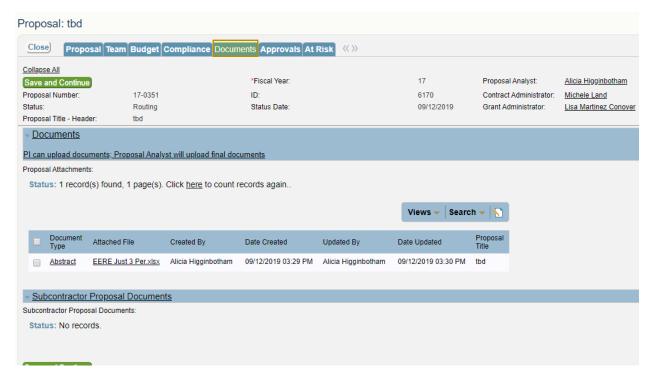
Selecting My Proposals in the Research column opens the table of proposal records in CRS:



Click on a six digit proposal number to enter into that record:



#### Select the Documents Tab:



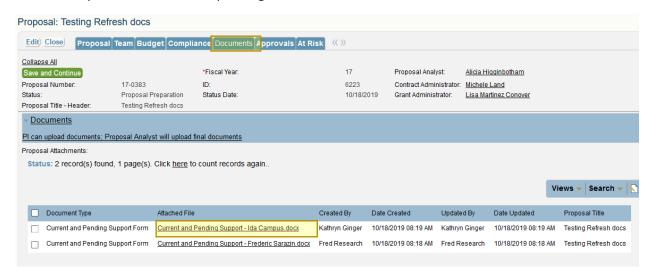
A list of all documents associated with that proposal appear and indicate the document type, who created it, and who uploaded it to CRS.

A PI is not required to upload documents to CRS. All documents are uploaded to the Documents Tab as Mines' official repository.

### **Edit Proposal Documents**

CRS allows users to check out and edit documents. This is especially beneficial at the Proposal stage when working with your Proposal Analyst. For instance, changes can be made to the current and pending document and then re-uploaded into the system; CRS retains both the original document and the revised/updated document.

In this example, Ida's current and pending document needs to be modified. Click the document

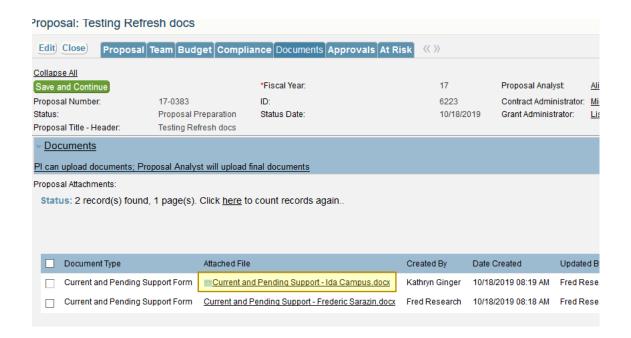


#### And then click on Edit & Checkout

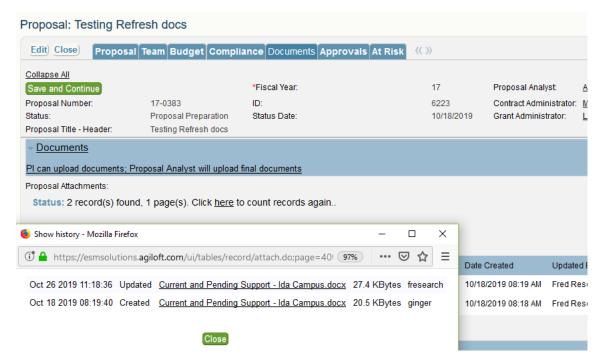


Once the file is opened, it can be modified as needed.

When finished modifying, click Save and the document will automatically re-upload to the Documents Tab. **Do not save to the desktop or to another file path.** 



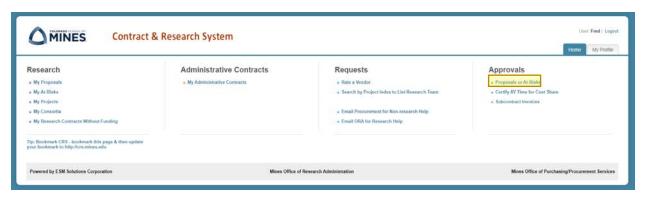
The blue + identifies that multiple components of a document are uploaded and when clicked on provides the date & time updated along with both the original and updated documents.



# Expand Files to see Documents during an Approval

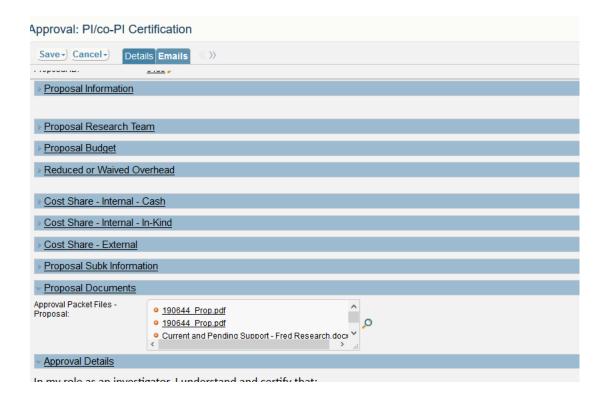
Sometimes there will be a LOT of documents for a proposal that the PI or DH will want to review before certifying.

#### To access Approvals:

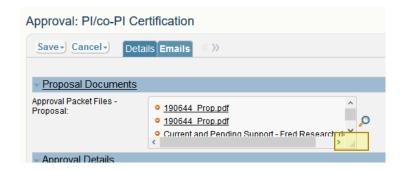




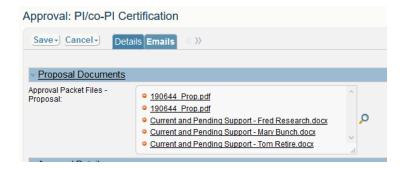
After clicking on a Proposal number, the record opens:



If only a few documents are visible, it's possible to expand the shaded square with the diagonal marks and pull it out and down to expand the box and see all the documents attached.



Expand the box to view all uploaded documents

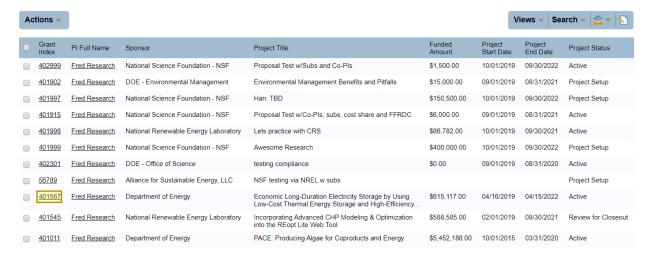


#### **View Project Documents**

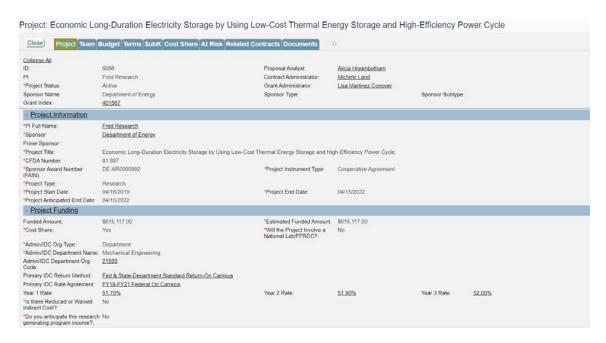
Documents may also be viewed under the My Projects. From the home page, in the first column, select **My Projects.** 



After clicking My Projects, CRS lists all affiliated projects as PI, CO-PI, or senior personnel.

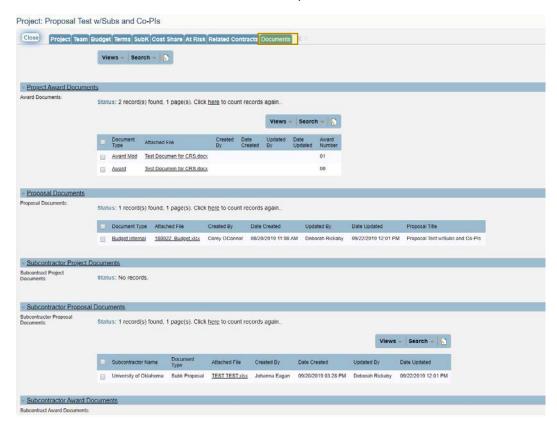


The Project page provides summary information of each project. Clicking on a Grant Index provides greater details and information on that project.



There are many tabs in this view, each containing different information relating to the project. The first tab of the Project records shows the summary project details.

The Documents Tab is the last tab across the top.



All documents related to the project, which include award, proposal, and subcontractor. Selecting the attached file will bring up the document such as a budget in Excel or invoice from a subcontractor.

#### **Attachments**

Attachments are used on At-Risk requests and also on Subcontract Monitoring.

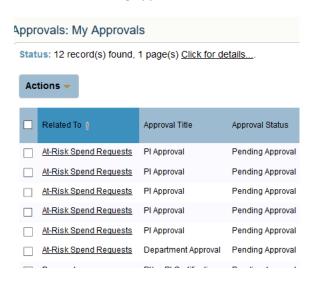
## At-Risk Request

When viewing an At-Risk for approval, all attachments related to the At-Risk are visible.

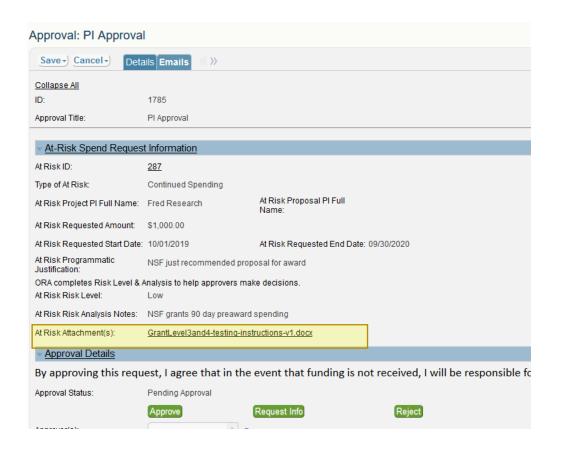
From the home page click on **Proposals or At-Risks** under the Approvals Tab:



#### All At-Risks needing approval are shown:



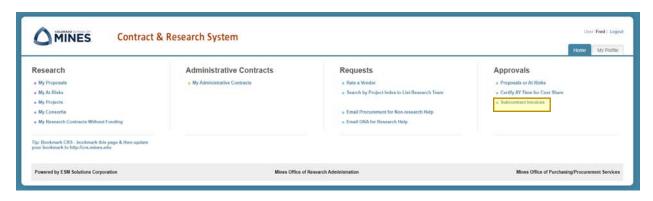
Click on an underlined link under the **Related To** header to view the details of that at-risk request. The Attachments are viewable in this section:



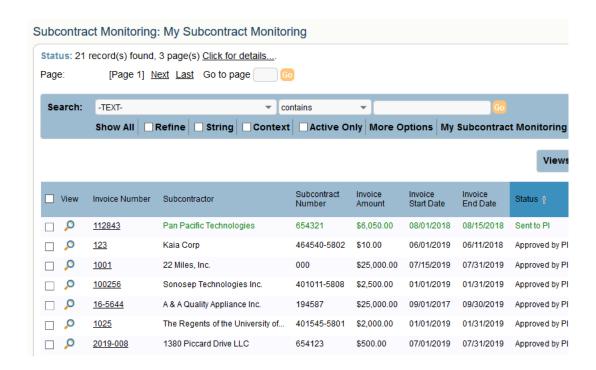
Click on the document to download & view the document.

### **SubK Monitoring**

From the home page click on **Subcontract Invoices** under the Approvals Tab:



All Subcontract Invoices needing approval are shown:



Click on a five digit invoice number to view the details for subcontract monitoring. The Attachments are viewable in this section:

