CRS - CONTRACT & RESEARCH SYSTEM:

PROPOSALS
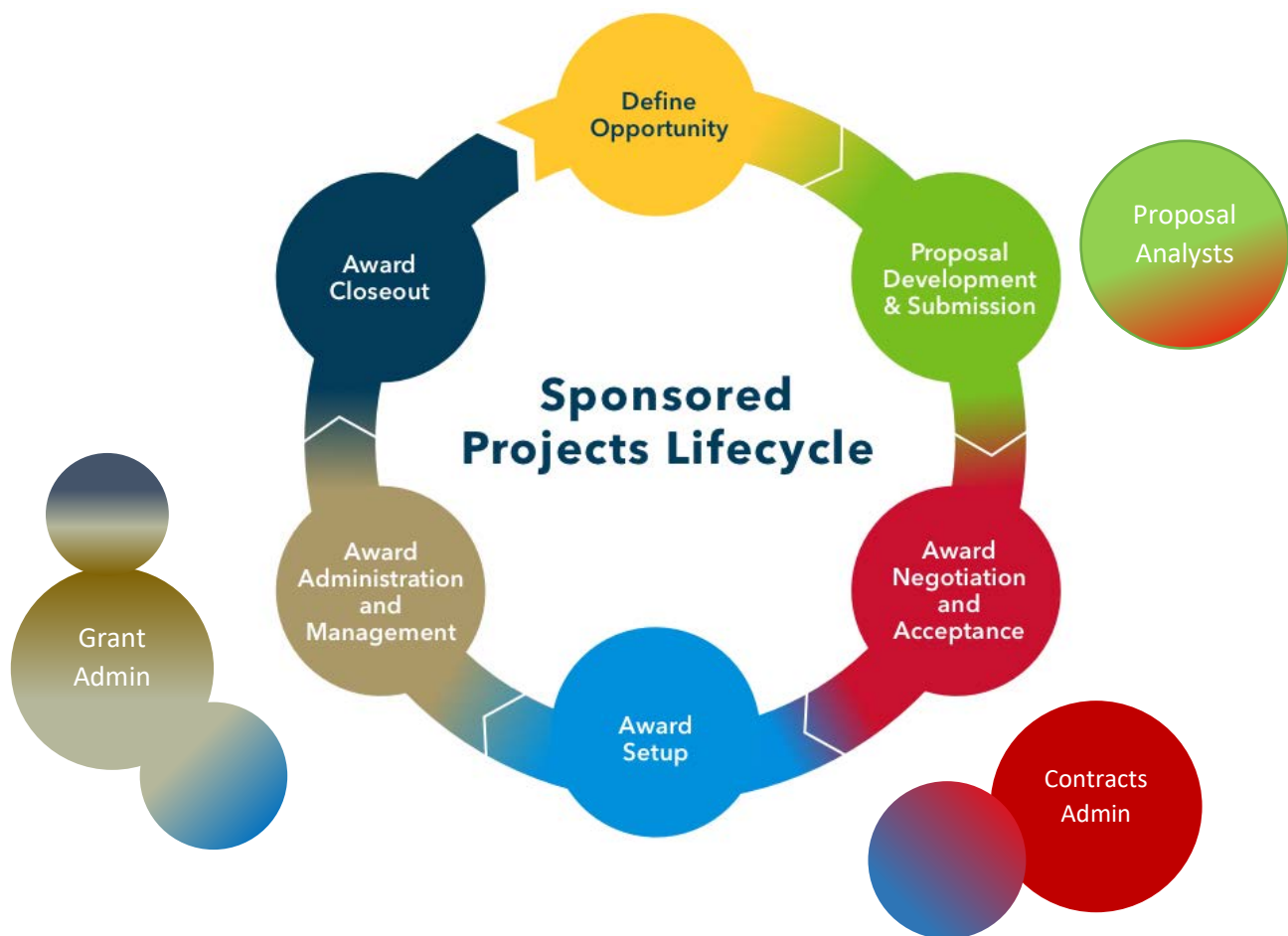
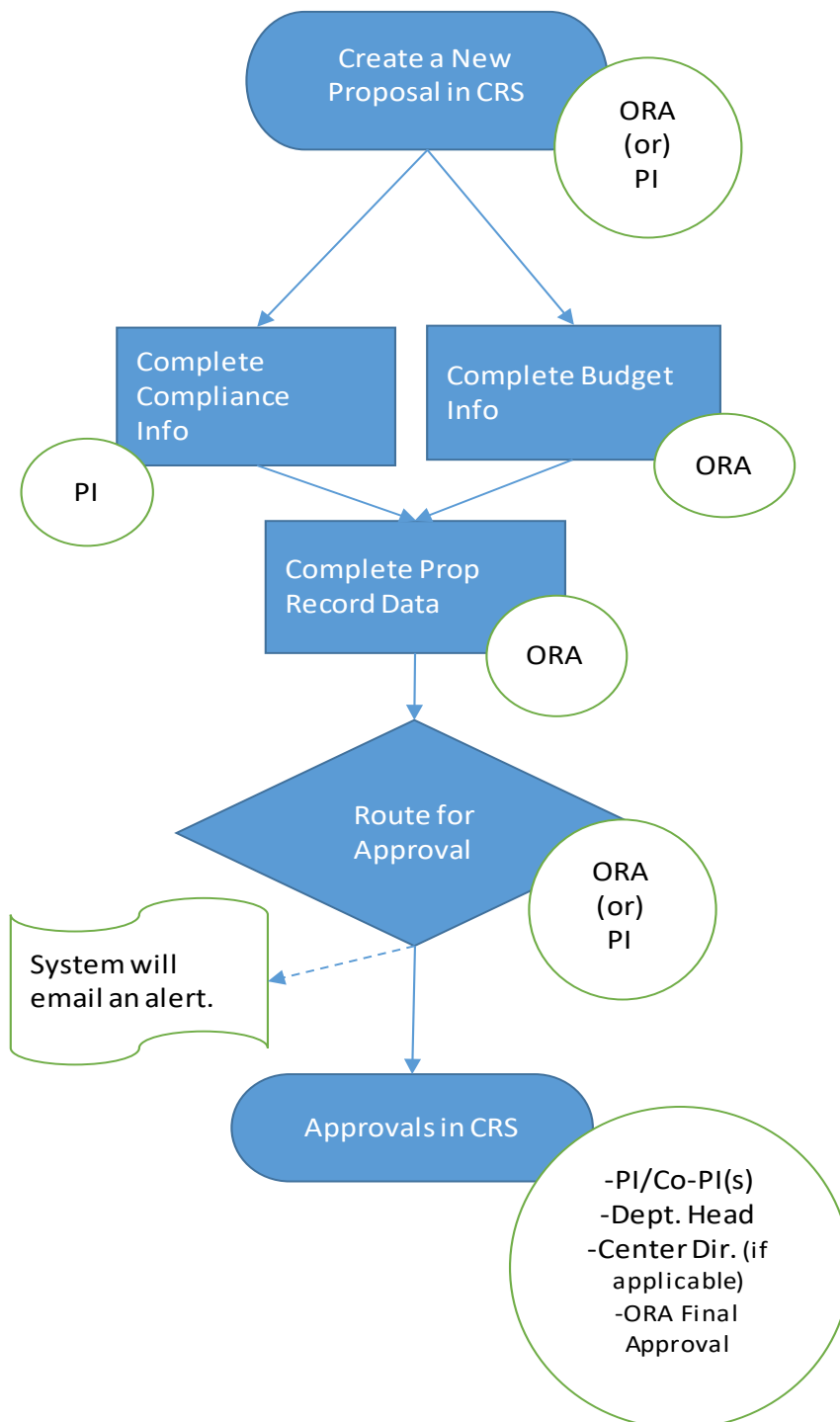**Table of Contents**

What is CRS?

The Contract and Research System, or CRS, is a joint online system used by Mines' Procurement Office and the Office of Research Administration (ORA). CRS is a single, online portal to assist Mines faculty and staff to navigate both Procurement and ORA actions.

CRS allows Mines and the Research Office to start proposals, request at-risk documents, route and certify requests, see funded and non-funded agreements, approve subrecipient invoices, and so much more! All relevant documents for a research project are stored in CRS.

Processing a Proposal in CRS

Create a New Proposal in CRS

ORA (or) PI

Complete Compliance Info

PI

Complete Budget Info

ORA

Complete Prop Record Data

ORA

Route for Approval

ORA (or) PI

System will email an alert.

Approvals in CRS

-PI/Co-PI(s)
-Dept. Head
-Center Dir. (if applicable)
-ORA Final Approval

Getting Started: Home Page

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

Username

Password

> Forgot your password?

> Need Help?

☐ Don't Remember Login

☐ Clear prior granting of permission for release of your information to this service.

Login

Use your Mines MultiPass to log in to the system.

Home page

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

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My Proposals

Selecting <u>My Proposals</u> in the Research menu opens the table of proposal records in CRS:

Sorting Information

Proposals can be sorted by clicking on items in the blue bar: Proposal Number, Status, Title, Sponsor, Total Budget, Sponsor Deadline Date or Date Submitted to Sponsor.

Click the Proposal Number or the Status link to open a Proposal Record.

Once a record is open, there will be multiple tabs across the top containing different data components needed to submit a proposal and, later, manage the award. These tabs are Proposal, Team, Budget, Compliance, Documents, Approvals, and At-Risk.

Creating a New Proposal

From the My Proposals section, a new proposal can be created by clicking **New**.

The Proposal record contains all of the data needed internally to review and approve the submission.

Proposal Record Tabs
All of the tabs of a proposal record are visible to anyone with a CRS login; however, some of the tabs are Read-only, and ORA is responsible for entering that data.

Once a record has been submitted for Routing for Approval, only ORA can make changes to any part of the record (including creating a Current and Pending document).

Proposal Tab

The minimum information when starting a proposal includes:

❖ Sponsor
❖ PI Name
❖ Will there be subcontracts?
❖ Will there be FFRDCs? (National labs)
❖ Is cost share included?
❖ Submission method
❖ Sponsor deadline
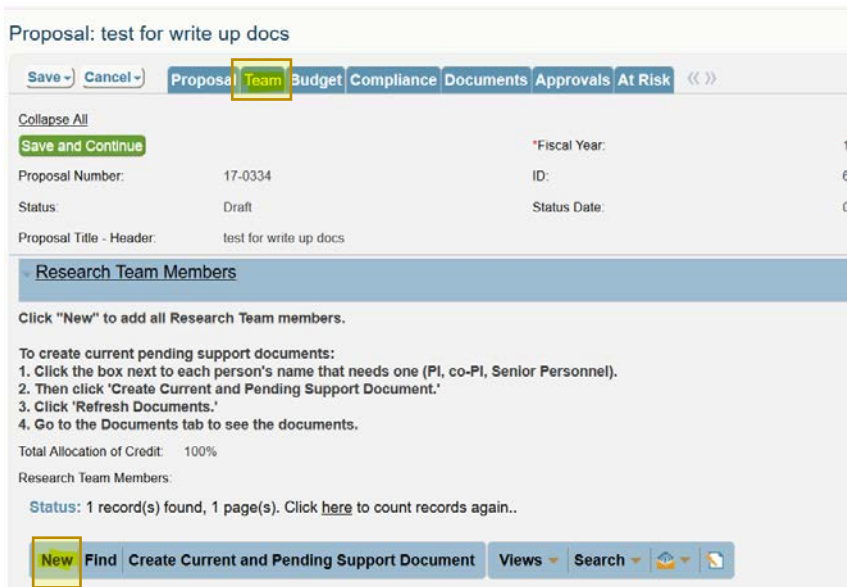
Send to Proposal Analyst : After entering the above information, click Send to Proposal Analyst and the proposal will land in the queue for the Proposal Analyst assigned the relevant department. S/he will then work to complete the documents needed for submission (including statement of work, budget, justification, sponsor forms) and to finalize the CRS record (This button is available at the bottom of each tab in a Proposal record.)

Save and Continue : Saves the data that has been entered and move forward to enter information on the remaining tabs.

Team Tab

On the Team Tab, click New to add Key Personnel including: PI, co-PI, Senior Personnel, and/or Postdoc

Key Personnel need to be added to the Team Tab – this includes the PI, Co-PI and Senior Personnel.

Information required to enter on Team Tab:

- ❖ Name
- ❖ Role (PI, co-PI, Senior Personnel, Postdoc)
- ❖ Allocation of Credit
  - o Credit should total 100% over all key personnel. <u>Postdocs are not eligible for credit</u>
- ❖ Person Months needs to have at least a value in all fields. If a field is not applicable, enter zero.
  - o **Calendar** - refers to the number of calendar months (typically used for post-docs and research faculty)
  - o **Academic** - refers to academic effort (typically used for academic faculty when there is cost share)

- o **Summer** - refers to the number of summer months (typically used by academic faculty)

Create Current & Pending Support Document

CRS has the ability to create a Current and Pending document for all Personnel on a project.

- ❖ Click the box next to the individual's name to create a Current and Pending document
- ❖ Click create Current & Pending support document
- ❖ A pop-up appears indicating the number of records to run, confirm by clicking 'run the action.'

Once the action is complete, a copy of the Current and Pending document is uploaded to the Documents Tab for viewing and editing.

It can take up to 5 minutes for the Current and Pending document to appear on the Documents Tab!

Hint: Click the Refresh Documents button and the document will show sooner in the Documents Tab.

Budget Tab

PI does not have access to enter budget information into the budget tab, all budget information is entered by the Proposal Analyst.
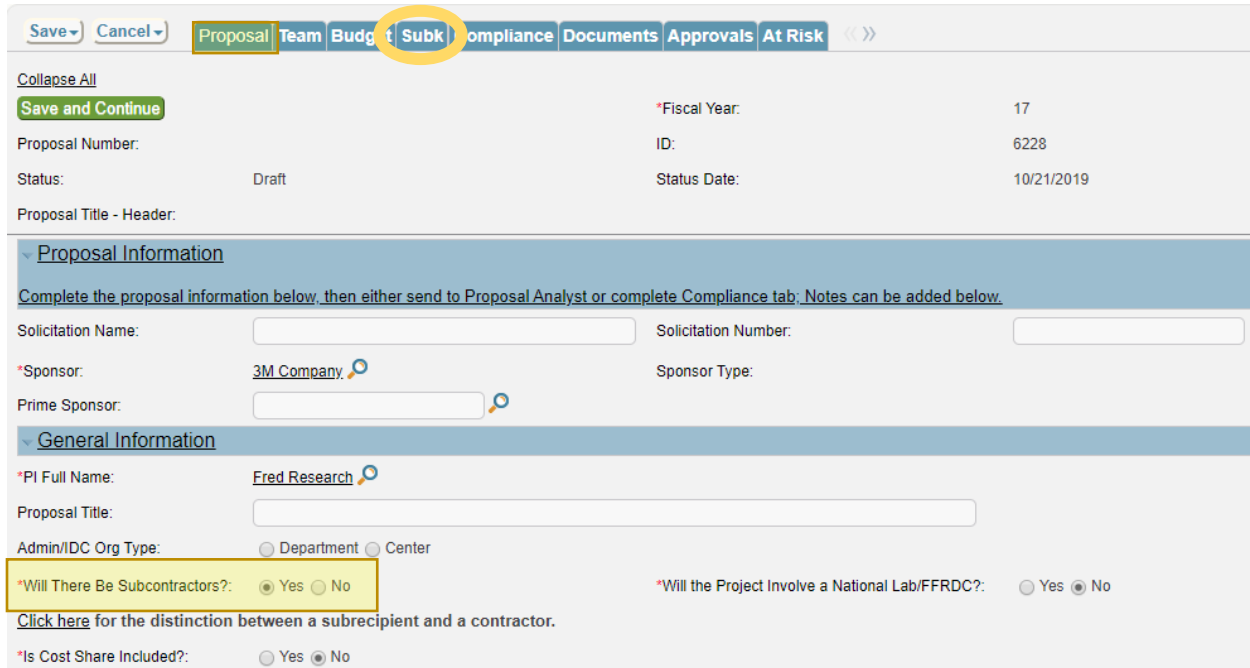

View only access to Budget. Proposal Analyst will enter budget information.

National Lab/FFRDC Information

FFRDC information is entered by the Proposal Analyst. Email your Proposal Analyst with the name of the national lab, contact(s), phone numbers(s), and email(s). This information is valuable for the entire ORA team from proposal through award.

Subk (Subrecipients) Tab

If on the Proposals Tab, 'yes' to 'Will there be Subcontractors?' was answered, then the Subk Tab will appear; if the answer is 'no' to this question, then the tab is not visible.

On the Subk Tab, click **New** to add a new Subrecipient.

The New button will only appear to PIs while a proposal is in the Draft status. To add new Subks later, contact your Proposal Analyst for assistance.

A Subcontractor Proposal record will appear:

To add, simply search with the magnifying glass. If the name doesn't appear, use 'Other' and email your Proposal Analyst with the subrecipient's name.

The search bar looks through all words of a company name, no need to type the full, legal, name.

Select the GREEN ARROW to add the subcontractor to the proposal record.

Cost Share Tab

If on the Proposals Tab, yes was answered to 'Is Cost Share Included?' then the Cost Share Tab will appear; if no is answered to this question, then it is not visible.

The Proposal Analyst will enter Cost Share information – everyone else has View access only.

Cost share information shown on this page includes:

1. <u>Internal Inkind</u> – this category represents the PIs/co-PIs use of Academic Year effort as cost share and includes salary, fringe, and overhead costs.
2. <u>Internal Cash</u> – this category is used for cash coming from within Mines. For example, cash from a PIs Personal Development account to cover equipment.
3. <u>External Inkind</u> – 3rd party providing inkind services to support cost share requirements. This could be in the form of employee services.
4. <u>External Cash</u> – 3rd party providing cash to support cost share needs of a project. At award, a check is requested from the 3rd party to cover the cash cost share requirements.

Per policy, Mines only provides cost share when mandated by the sponsor and included in the solicitation.

Compliance Tab

> Abstract
> Research Area
> Institutional Questions
> Science Code & Research Type
> Conflict of Interest
> Human Subjects
> Animal Subjects
> Hazardous Materials
> Intellectual Property
> Export Control

All sections of the Compliance Tab must be filled out by the PI.

Completing this section should take less than five minutes.

Abstract: Open text field. Paste or type an abstract into this field. Keep abstracts to less than 2,000 characters.

All other sections: Use the options provided to select the topic or yes/no as they apply to this project.
- **Note** about the Science Code and Research Type: This is an NSF code which is required for annual reporting purposes regardless of whether this proposal is for NSF.
- Certain responses will prompt new menus to appear. For example, selecting human subjects prompts additional questions.

Once all items are completed, there are two options.

If all required data has been entered, click: **Submit for Routing**

OR

If more data input is needed, click: **Send to Proposal Analyst**

When all compliance information is complete, along with the rest of the proposal information recorded by the Proposal Analyst, it can be submitted for routing.

Answer Compliance Questions Early!

Answering compliance questions at the start of a submission helps make everything run smoother and allow for earlier proposal approval routing.

Documents Tab

A PI is not required to upload documents to CRS. The Proposal Analyst can upload documents. All documents, including the submitted proposal, will be uploaded to the Documents Tab as Mines' official repository.

Editing 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; CRS will show both the original document and the revised/updated document.

In this example, Ida's current and pending document needs to be modified. Click on 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 be re-uploaded to the Documents Tab. Do not save to the desktop or to another file path, clicking the save icon is sufficient.

Proposal: Testing Refresh docs

Edit Close **Proposal** Team **Budget** Compliance Documents **Approvals** At Risk « »

Collapse All

Save and Continue

		*Fiscal Year:	17	Proposal Analyst:	Ali
Proposal Number:	17-0383	ID:	6223	Contract Administrator:	Mi
Status:	Proposal Preparation	Status Date:	10/18/2019	Grant Administrator:	Lis
Proposal Title - Header:	Testing Refresh docs				

Documents

PI can upload documents; Proposal Analyst will upload final documents

Proposal Attachments:

Status: 2 record(s) found, 1 page(s). Click here to count records again..

	Document Type	Attached File	Created By	Date Created	Updated B
☐	Current and Pending Support Form	Current and Pending Support - Ida Campus.docx	Kathryn Ginger	10/18/2019 08:19 AM	Fred Rese
☐	Current and Pending Support Form	Current and Pending Support - Frederic Sarazin.docx	Fred Research	10/18/2019 08:18 AM	Fred Rese

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.

Proposal: Testing Refresh docs

Edit Close **Proposal** Team **Budget** Compliance Documents **Approvals** At Risk « »

Collapse All

Save and Continue

		*Fiscal Year:	17	Proposal Analyst:	A
Proposal Number:	17-0383	ID:	6223	Contract Administrator:	M
Status:	Proposal Preparation	Status Date:	10/18/2019	Grant Administrator:	L
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Proposal Attachments:

Status: 2 record(s) found, 1 page(s). Click here to count records again..

Show history - Mozilla Firefox — □ ✕

https://esmsolutions.agiloft.com/ui/tables/record/attach.do;page=40t 97% ··· ☑ ☆ ≡

					Date Created	Updated B
Oct 26 2019 11:18:36	Updated	Current and Pending Support - Ida Campus.docx	27.4 KBytes	fresearch	10/18/2019 08:19 AM	Fred Res
Oct 18 2019 08:19:40	Created	Current and Pending Support - Ida Campus.docx	20.5 KBytes	ginger	10/18/2019 08:18 AM	Fred Res

Close

Approvals

The Approvals section of the Home page allows for Proposals and At-Risk request approvals.
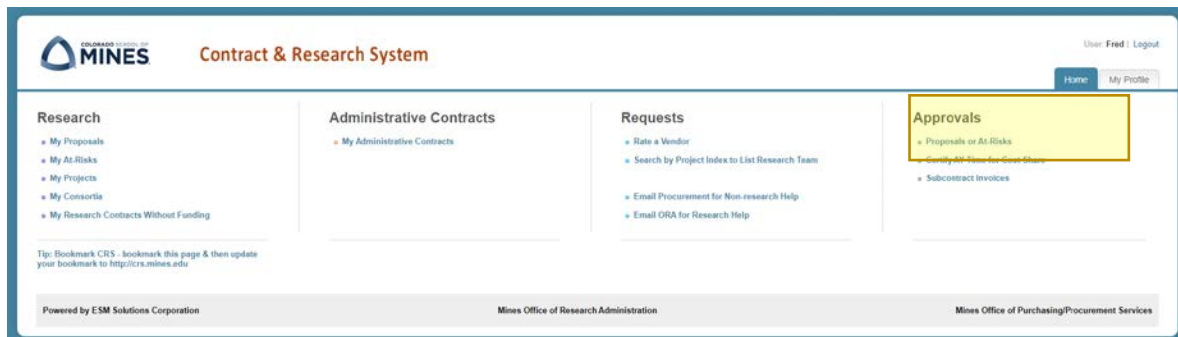
provals: My Approvals

Status: 12 record(s) found, 1 page(s) Click for details....

Actions ▾

	Related To	Approval Title	Approval Status	Proposal Number	Proposal Role	Sponsor	De Na
☐	Proposals	PI/co-PI Certification	Pending Approval	17-0364	co-PI	Department of Energy	Phy
☐	Proposals	PI/co-PI Certification	Pending Approval	17-0351	PI	National Science Foundation - NSF	Ch
☐	Proposals	PI/co-PI Certification	Pending Approval	17-0350	PI	3D-P	Ch
☐	Proposals	PI/co-PI Certification	Pending Approval	17-0348	PI	BP Alternative Energy	Ch
☐	At-Risk Spend Requests	PI Approval	Pending Approval				
☐	Proposals	PI/co-PI Certification	Pending Approval	17-0338	PI	National Science Foundation - NSF	Ch

Alternately, CRS sends an email requesting approvals which includes a link to the record's Approval section.

Please do not respond directly to this email.

If you have questions about this email, contact ora@mines.edu.

Proposal Number: 19-0000
Proposal PI: Fred Research
Proposal Title: VP Demo - Do not touch
Sponsor: National Science Foundation - NSF
Prime Sponsor:

Cost Share: Yes Mandatory
Cost Share Total: $50,000.00
Human Subjects: Yes
Lab Modifications Needed: Yes a new vent hood
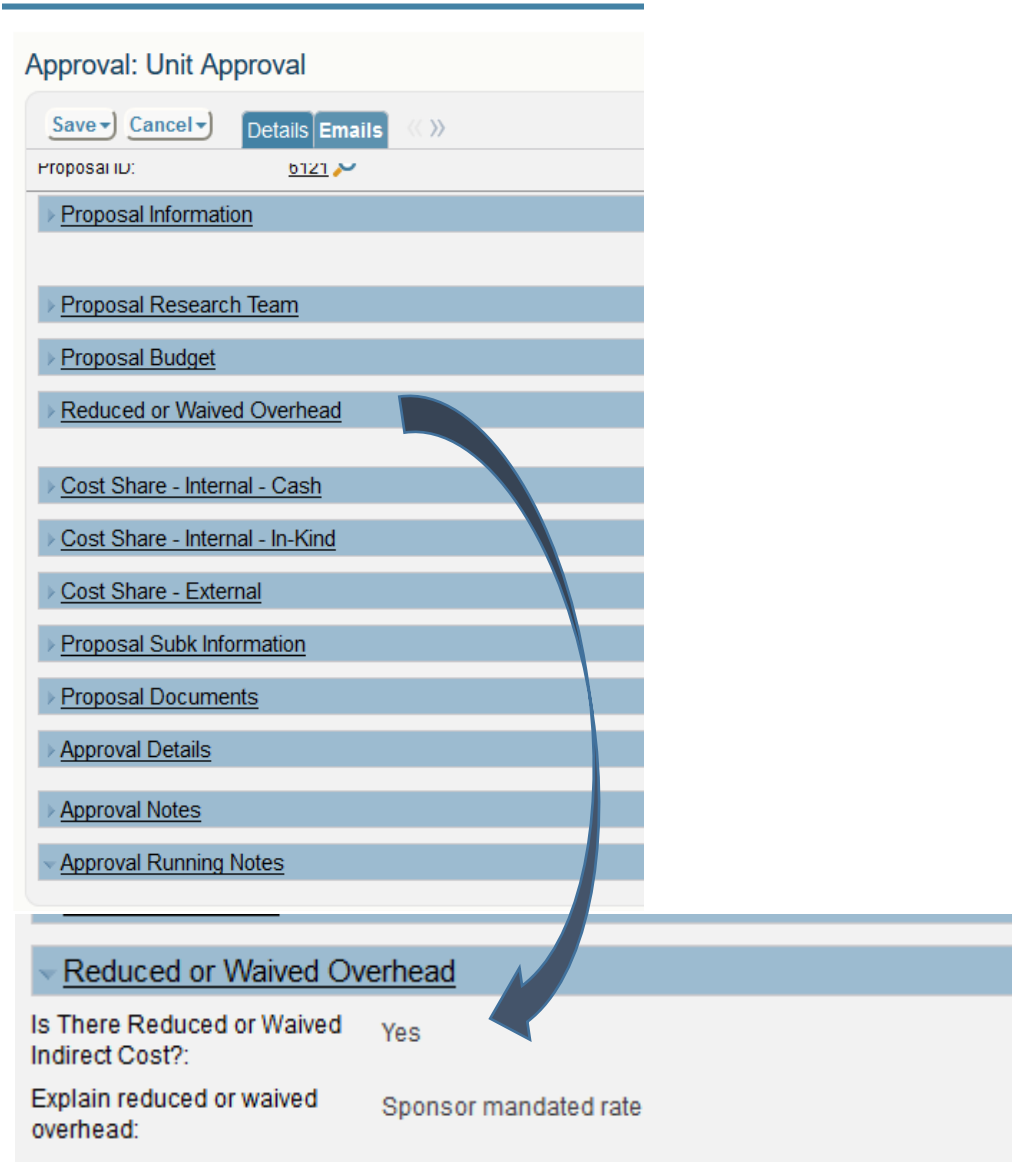
The above proposal has been submitted for routing and needs your approval.

Please click here to review and certify the proposal and its attachments. Look carefully at the budget and any associated cost or equipment requirements.

Complete the certification by clicking the Approve or Reject status buttons. You can add notes as needed; a rejection requires an explanatory note. Your approval

A proposal requires approvals from all PIs, co-PIs, associated Department Heads, and Center Directors, if a Center is being used, before it can be ORA approved..

Each subsection in the Approvals page opens to show more proposal details:

Click the magnifying glass to see details of the proposed cost share.

Expand Files to see Documents in an Approval

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

Re-Directing Approvals

Authorized approvers, such as Department Heads or Center Directors, have the ability to delegate approval authority to an appropriate backup if on extended leave.

To do this, go to My Profile from the home page, change Work Status from Working to Out of Office, select the appropriate person to designate as the backup signatory, and choose a return to work date. During this designated period, the designated backup will receive all of the automated CRS approval emails until the date specified.

My profile

At-Risk Tab

If a PI has been informed by a sponsor that an award is coming, it is possible to request an At-Risk spending account from the At-Risk Tab.

Click New and fill out the asterisked information necessary to complete the request.

Once the At-Risk form is complete, click

Tips and Tricks

How to copy a proposal:

Select the proposal record to copy – place a check in the box by it

From the My Proposals menu, hit the **Copy Proposal** button then the **Run the Action** button

A draft is created and added to the proposal list. Click Draft under the status header to select the copied proposal, then hit the Edit button to make the necessary changes/updates to any field that has a red * – this only applies to the first Proposal Tab, the rest of the proposal tabs are not copied.

Run a Search

A Search can be run on any field, but use the drop down menu – for example Proposal Title, Sponsor, Status, Admin IDC Center Name, Admin IDC Department Name would be common searches. Type in the searchable text and click Go.

Check the status of a proposal

Icons help identify the status of a proposal. If there is no icon, it means the proposal is in Draft or

Proposal Preparation status. Some icons include: Routing , PI Certification , ORA Approved ,

Funded , Not Funded , Withdrawn or Not Submitted .

Statuses:
- Draft
- Proposal Preparation
- Routing
- Funded
- Withdrawn
- Not Submitted
- Not Funded

The typical proposal statuses would go from Draft … Proposal Preparation … PI Certification …. Routing … ORA Approved …. Funded (YAY!)

Best Tip Ever:

Be patient!
The system can take a while to load documents so don't panic when it seems like nothing is happening.

2nd Best Tip:
When flummoxed, contact your proposal analyst!