

# CRS - CONTRACT & RESEARCH SYSTEM: PROPOSALS

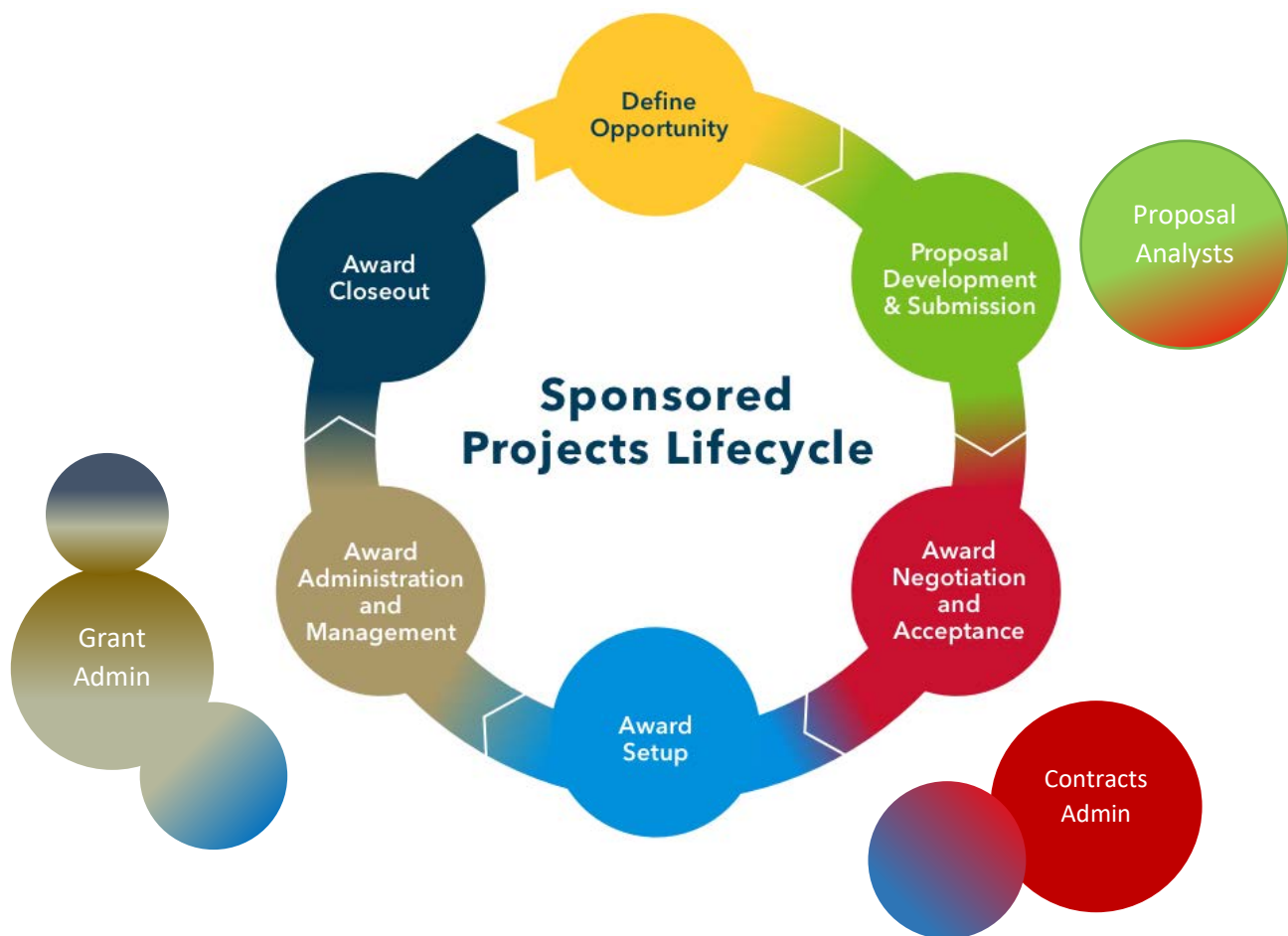
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## What is CRS?

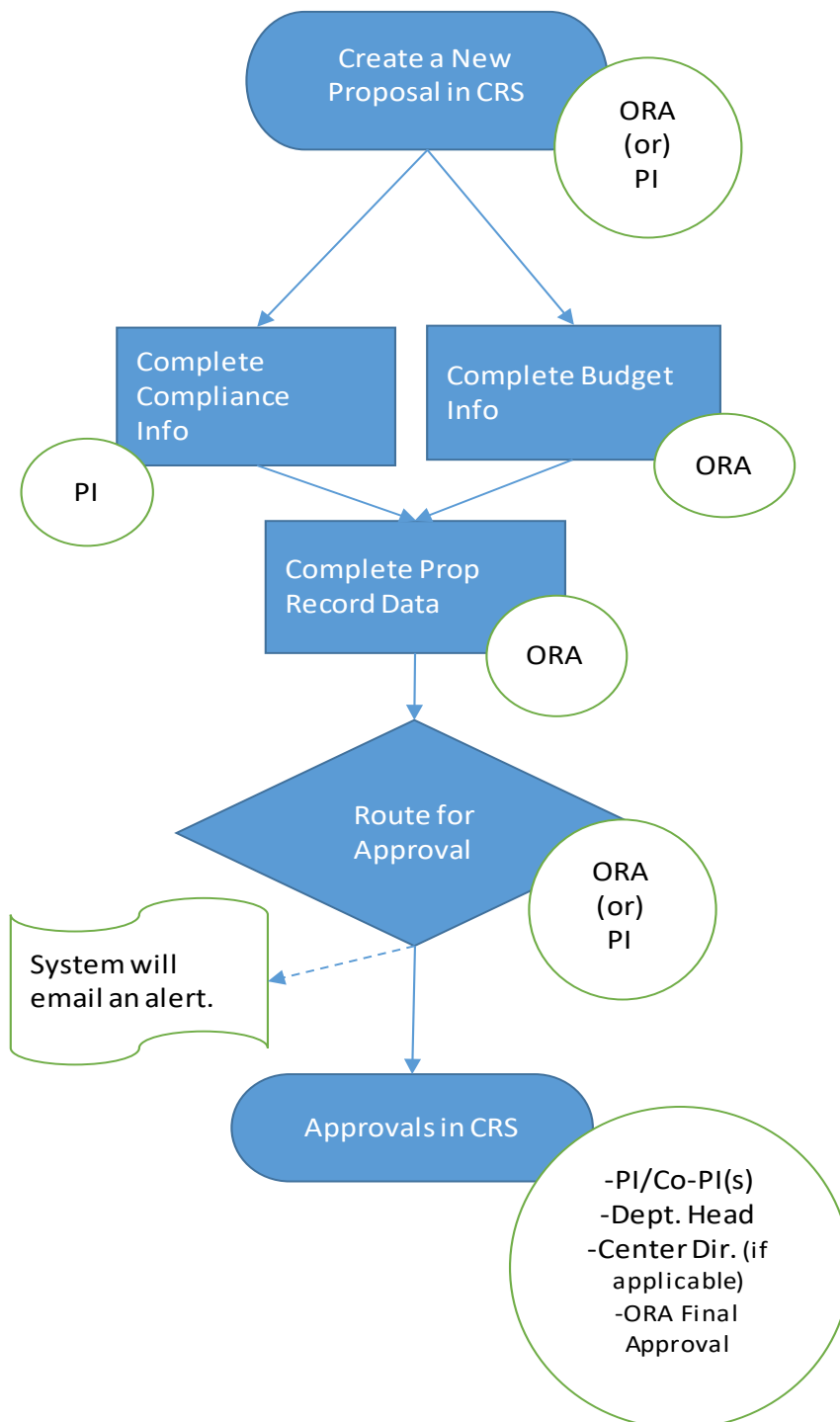
The Contract and Research System, or CRS, is a joint online system used by Mines' Procurement Office and the Office of Research Administration (ORA). CRS is a single, online portal to assist Mines faculty and staff to navigate both Procurement and ORA actions.

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





## Getting Started: Home Page

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



Username

> Forgot your password?

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

Contract & Research System

User: Fred | Logout

Home My Profile

**Research**

- My Proposals
- My At Risks
- My Projects
- My Consortia
- My NDAs, MOUs, Data Use

**Administrative Contracts**

- Start a Purchase
- Make an Agreement
- Use a Facility
- My Administrative Contracts

**Requests**

- Rate a Vendor
- PI Change (future)
- No Cost Extension (future)
- Find People on Proposals
- Find People on Projects
- See Vendor Ratings (future)

**Approvals**

- Proposals or At Risks
- Certify AT time
- Subcontract Invoices

Powered by ESM Solutions Corporation Mines Office of Research Administration Mines Office of Purchasing/Procurement Services

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

User: Fred | Logout

Home

My Profile



# CRS Home Page

**Research**

- My Proposals
- My At-Risks
- My Projects
- My Consortia
- My Research Contracts Without Funding

**Administrative Contracts**

- My Administrative Contracts

**Requests**

- Rate a Vendor
- Search by Project Index to List Research Team
- Email Procurement for Non-Research Help
- Email CRS for Research Help

**Approvals**

- Proposals or At-Risks
- CRW AT Time for Cost Share
- Subcontract Process

Powered by B2B Solutions Corporation      Mines Office of Research Administration      Mines Office of Purchasing/Procurement Services

Research Actions      Procurement      Find CRS Data      Approvals

## My Proposals

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

**Research**

- My Proposals
- My At-Risks
- My Projects
- My Consortia
- My Research Contracts Without Funding

Proposals: My Proposals

Status: 46 record(s) found, 1 page(s) [Click for details...](#)

Search:  contains

Show All ☐ Refine ☐ String ☐ Context ☐ Active Only More Options: [My Proposals](#)

New Views

<input type="checkbox"/>	Proposal Number	PI Full Name	Status	Proposal Title	Sponsor	Total Budget	Sponsor Deadline Date	Date Submitted to Sponsor
<input type="checkbox"/>	17-0345	Tom Reine	ORA approved	Doing cool things with water reclamation	Bureau of Land Management - BLM	\$292,442.09	06/01/2020	
<input type="checkbox"/>	17-0338	Fred Research	Pending	Testing w/multiple PIs, cost share, FFRDC, and subke	National Science Foundation - NSF	\$0.00	08/30/2019	

## 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.

Proposals: My Proposals

Status: More than 100 record(s) found [Click for details...](#)

Page: [Page 1] [Next](#) [Last](#) Go to page  [Go](#)

**New** Views Search Copy Proposal Actions

<input type="checkbox"/>	Proposal Number	PI Full Name	Status	Proposal Title	Sponsor	Total Budget	Sponsor Deadline Date	Date Submitted to Sponsor
<input type="checkbox"/>	<a href="#">17-0351</a>	Fred Research	<a href="#">Routing</a>	tbd	National Science Foundation - NSF	\$0.00	01/01/2020	
<input type="checkbox"/>	<a href="#">17-0350</a>	Fred Research	<a href="#">Withdrawn</a>	sdhg	3D-P	\$0.00	01/01/2020	
<input type="checkbox"/>	<a href="#">17-0349</a>	Fred Research	<a href="#">Draft</a>		National Science Foundation - NSF	\$0.00	08/29/2019	
<input type="checkbox"/>	<a href="#">17-0348</a>	Fred Research	<a href="#">Routing</a>	Training CRS	BP Alternative Energy	\$1,402,000.00	09/17/2019	
<input type="checkbox"/>	<a href="#">17-0347</a>	Fred Research	<a href="#">Proposal Preparation</a>	rtshgth	3D-P	\$0.00	01/01/2020	
<input type="checkbox"/>	<a href="#">17-0343</a>	Fred Research	<a href="#">Funded</a>	Lets practice with CRS	National Renewable Energy Laboratory	\$0.00	09/30/2019	
<input type="checkbox"/>	<a href="#">17-0342</a>	Fred Research	<a href="#">Routing</a>	Chemistry in the Future	DOE - Advanced Research Projects Agency Energy - ARPA-E	\$0.00	09/20/2019	
<input type="checkbox"/>	<a href="#">17-0339</a>	Fred Research	<a href="#">Routing</a>	Testing w/multiple PIs, cost share, FFRDC, and subks	National Science Foundation - NSF	\$31,000.00	08/30/2019	
<input type="checkbox"/>	<a href="#">17-0336</a>	Fred Research	<a href="#">Routing</a>	Mines Training 08-27-2019	Environmental Protection Agency - EPA	\$0.00	09/18/2019	
<input type="checkbox"/>	<a href="#">17-0334</a>	Fred Research	<a href="#">Draft</a>	test for write up docs	National Science Foundation - NSF	\$0.00	08/29/2019	
<input type="checkbox"/>	<a href="#">17-0333</a>	Fred Research	<a href="#">Routing</a>	Testing to See if Approve Proposal Emails happens	ADA Technologies, Inc.	\$0.00	08/22/2019	

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.

[Close](#) **Proposal** Team Budget Compliance Documents Approvals At Risk <>

[Collapse All](#)

[Save and Continue](#)

Proposal Number:	17-0385	*Fiscal Year:	17	Proposal Analyst:	<a href="#">Alicia Higginbotham</a>
Status:	Routing	ID:	6227	Contract Administrator:	<a href="#">Michele Land</a>
Proposal Title - Header:	Testing Approval Email Proposal	Status Date:	10/18/2019	Grant Administrator:	<a href="#">Lisa Martinez Conover</a>

## Creating a New Proposal

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

Proposals: My Proposals

Status: More than 100 record(s) found [Click for details...](#)

Page: [Page 1] [Next](#) [Last](#) Go to page  [Go](#)

**New** Views Search Copy Proposal Actions

<input type="checkbox"/>	Proposal Number	PI Full Name	Status	Proposal Title	Sponsor	Total Budget	Sponsor Deadline Date	Date Submitted to Sponsor
<input type="checkbox"/>	<a href="#">17-0364</a>	Tom Retire	<a href="#">Not Funded</a>	Testing for CRS tips and tricks	Department of Energy	\$1,797,423.00	10/04/2019	
<input type="checkbox"/>	<a href="#">17-0351</a>	Fred Research	<a href="#">Routing</a>	tbd	National Science Foundation - NSF	\$0.00	01/01/2020	

### Proposal Record Tabs

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).

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

Proposal Information	
Complete the proposal information below, then either send to Proposal Analyst or complete Compliance tab; Notes can be added below.	
Solicitation Name:	Solicitation Number:
*Sponsor:	Sponsor Type:
Prime Sponsor:	
General Information	
*PI Full Name:	
Proposal Title:	
Admin/IDC Org Type:	
*Will There Be Subcontractors?:	*Will the Project Involve a National Lab/FFRDC?:
*Is Cost Share Included?:	
Project Start Date:	Project End Date:
Proposal Type:	
Proposal Category:	
Submission Method	
*Submission Method:	
*Sponsor Deadline Date:	Sponsor Deadline Time MST:
Date Submitted to Sponsor:	Sponsor Confirmation Number:
Notes	
Proposal Notes: <div>             Notes are optional. Let ORA know any pertinent details.           </div>	
Related Project	
Related Project ID:	Related Project Title:



### Send to Proposal Analyst

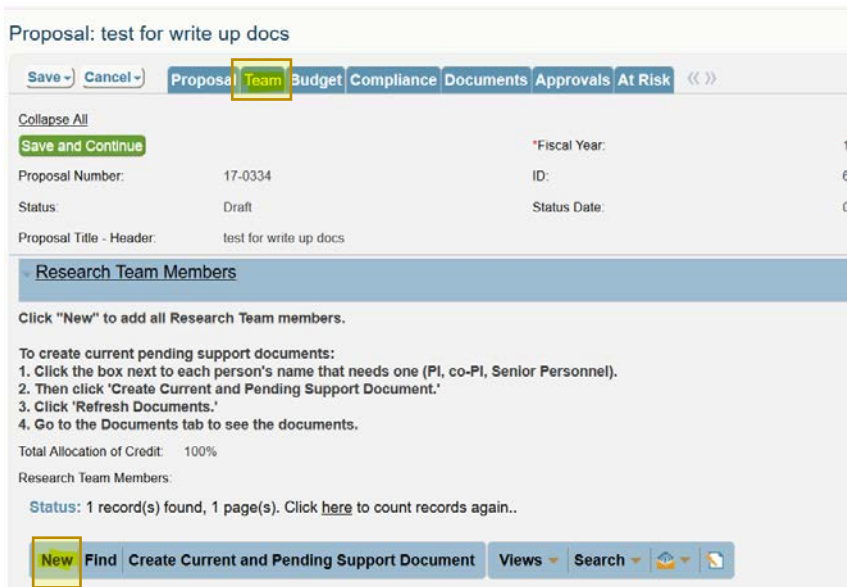
: After entering the above information, click Send to Proposal Analyst and the proposal will land in the queue for the Proposal Analyst assigned the relevant department. S/he will then work to complete the documents needed for submission (including statement of work, budget, justification, sponsor forms) 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
  - Credit should total 100% over all key personnel. Postdocs are not eligible for credit
- ❖ Person Months needs to have at least a value in all fields. If a field is not applicable, enter zero.
  - **Calendar** - refers to the number of calendar months (typically used for post-docs and research faculty)
  - **Academic** - refers to academic effort (typically used for academic faculty when there is cost share)

- **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.'

Proposal Title - Header: CRS Test

**Research Team Members**

To edit this page, click "Edit" at the top left corner.

Click "New" to add all Research Team members.

To create current pending support documents:

1. Click the box next to each person's name that needs one (PI, co-PI, Senior Personnel).
2. Then click 'Create Current and Pending Support Document.'
3. Click 'Refresh Documents.'
4. Go to the Documents tab to see the documents.

Total Allocation of Credit: 100%

Research Team Members:

Status: 1 record(s) found, 1 page(s). Click [here](#) to count records again.. 1 record(s) are selected

**New Find Create Current and Pending Support Document Views Search**

<input type="checkbox"/>	Full Name	Role	Allocation of Credit	Calendar	Academic	Summer
<input checked="" type="checkbox"/>	Fred Research	PI	100%	12.00	0.00	0.00

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.

**Save Cancel Proposal Team Budget Subk Cost Share Compliance Documents Approvals At Risk << >>**

**Collapse All**

**Save and Continue**

\*Fiscal Year: 17

Proposal Number: 17-0347 ID: 6139

Status: Proposal Preparation Status Date: 09/10/2019

Proposal Title - Header: CRS Test

**Documents**

PI can upload documents; Proposal Analyst will upload final documents

Proposal Attachments:

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

**New Find Unlink Actions Views Search**

<input type="checkbox"/>	Document Type	Attached File	Created By	Date Created	Updated By	Date Updated	Proposal Title
<input type="checkbox"/>	Current and Pending Support Form	Current and Pending Support - Fred Research.docx	Fred Research	10/10/2019 09:36 AM	Fred Research	10/10/2019 09:36 AM	CRS Test



## Budget Tab

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

Proposal: Training CRS

[Close](#) [Proposal](#) [Team](#) [Budget](#) [Compliance](#) [Documents](#) [Approvals](#) [At Risk](#) << >>

[Collapse All](#)

[Save and Continue](#)

\*Fiscal Year: 17

Proposal Analyst: [Alicia Hogginsbotham](#)

Proposal Number: 17-0348 ID: 6141

Contract Administrator: [Michele Land](#)

Status: Routing Status Date: 09/12/2019

Grant Administrator: [Lisa Martinez Conover](#)

Proposal Title - Header: Training CRS

### Budget Information

PI only has view access of the budget; budget information is entered by the Proposal Analyst.

*Number of Budget Periods:	3	*Direct Cost Amount 1:	\$287,035.00	*Direct Cost Amount 2:	\$313,367.00	*Direct Cost Amount 3:	\$349,934.00
Direct Cost Total:	\$950,336.00	*Indirect Cost Amount 1:	\$73,881.00	*Indirect Cost Amount 2:	\$62,993.00	*Indirect Cost Amount 3:	\$64,790.00
Indirect Cost Total:	\$201,664.00	Mines Request Amount 1:	\$360,916.00	Mines Request Amount 2:	\$376,360.00	Mines Request Amount 3:	\$414,724.00
Mines Total Request:	\$0.00	Total Budget Period 1 Project Cost:	\$441,442.00	Total Budget Period 2 Project Cost:	\$459,662.00	Total Budget Period 3 Project Cost:	\$500,896.00
Total Budget:	\$0.00						
*IDC Rate Agreement:	FY00 Federal On Campus						
Year 1 Rate:	50.00%	Year 2 Rate:		Year 3 Rate:			
*Is there reduced or waived indirect cost?:	No						

### FFRDC Information

[Save and Continue](#)

Total Budget

Years 1-5

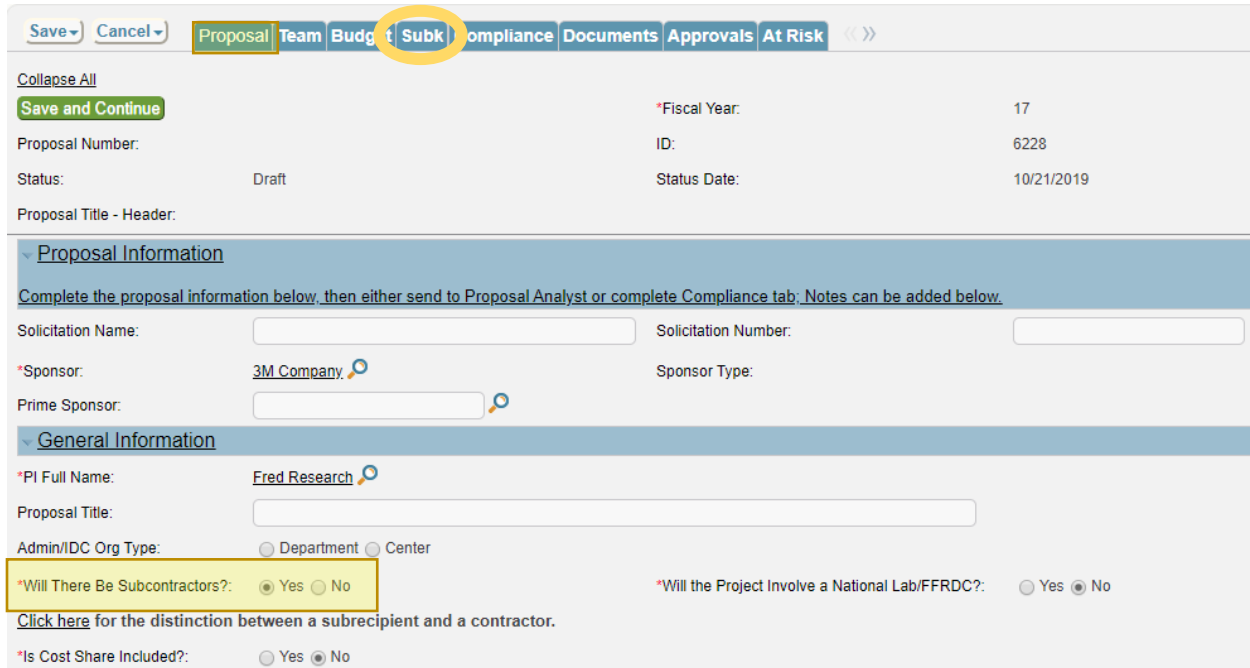
View only access to Budget. Proposal Analyst will enter budget information.

## 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.



Save Cancel Proposal Team Budget **Subk** Compliance Documents Approvals At Risk << >>

[Collapse All](#)

**Save and Continue** \*Fiscal Year: 17

Proposal Number: ID: 6228

Status: Draft Status Date: 10/21/2019

Proposal Title - Header:

**Proposal Information**

Complete the proposal information below, then either send to Proposal Analyst or complete Compliance tab. Notes can be added below.

Solicitation Name: Solicitation Number:

\*Sponsor: 3M Company Sponsor Type:

Prime Sponsor:

**General Information**

\*PI Full Name: Fred Research

Proposal Title:

Admin/IDC Org Type: ☐ Department ☐ Center

\*Will There Be Subcontractors?: ☒ Yes ☐ No \*Will the Project Involve a National Lab/FFRDC?: ☐ Yes ☒ No

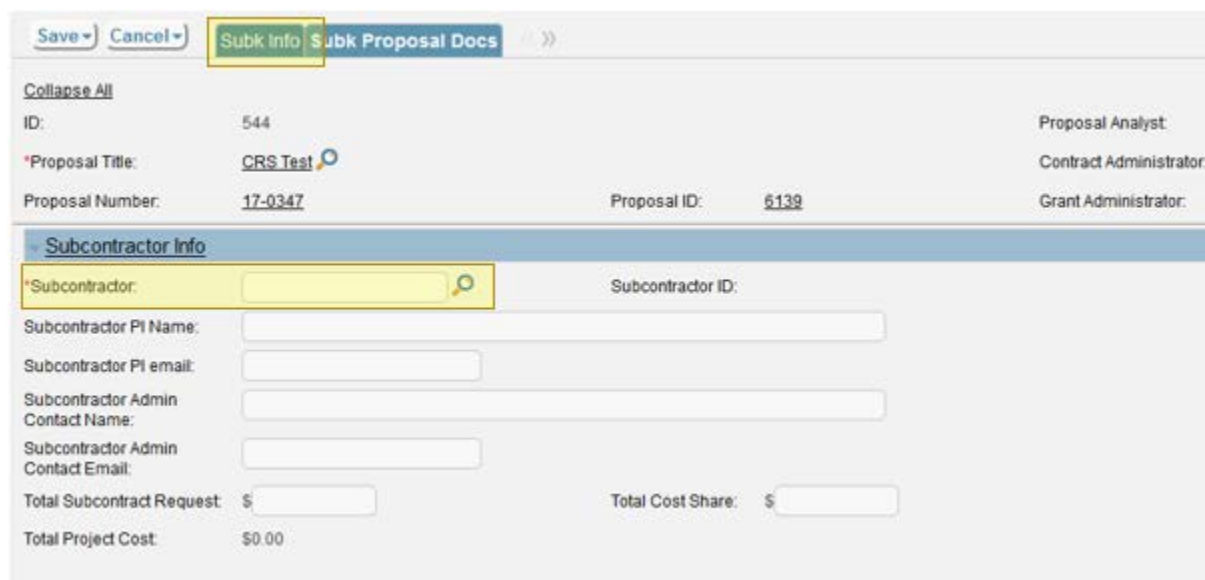
[Click here](#) for the distinction between a subrecipient and a contractor.

\*Is Cost Share Included?: ☐ Yes ☒ No

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:



Save Cancel **Subk Info** Subk Proposal Docs << >>

[Collapse All](#)

ID: 544 Proposal Analyst:

\*Proposal Title: CRS Test Contract Administrator:

Proposal Number: 17-0347 Proposal ID: 6139 Grant Administrator:

**Subcontractor Info**

\*Subcontractor: Subcontractor ID:

Subcontractor PI Name:

Subcontractor PI email:

Subcontractor Admin Contact Name:

Subcontractor Admin Contact Email:

Total Subcontract Request: \$ Total Cost Share: \$

Total Project Cost: \$0.00

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.

Search again:   [Advanced Search](#)

☒ String ☐ Context

Search in the Company table and its subtables:






☒ Company Name ☐ All text fields  
☐ All linked fields

**Companies**

**Companies**

**Status:** More than 100 record(s) found [Click for details...](#)

Page: [Page 1] [Next](#) [Last](#) Go to page

Edit	Vendor ID	Company Name ↑	Company Type	Average Score	Legal Location
	10727060	2WR of Colorado, Inc.	V		
	10467462	A Helping Hand of Colorado	V		
	10579577	AAA Travel Colorado	V		
	10547510	Allied Jewish Federation of Colorado	V		
	10467481	Alpha Phi Chapter of Colorado School of Mines	V		

**Tip:** To see all records, leave the search box empty.

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.



Save Cancel Proposal Team Budget **Cost Share** Compliance Documents Approvals At Risk << >>

Expand All | Collapse All | Default View

Save and Continue

\*Fiscal Year: 17

Proposal Number: ID: 6148

Status: Draft Status Date: 09/11/2019

Proposal Title - Header:

Proposal Information

Complete the proposal information below, then either send to Proposal Analyst or complete Compliance tab; Notes can be added below.

General Information

\*PI Full Name: Fred Research

Proposal Title:

Admin/IDC Org Type: ☐ Department ☐ Center

\*Will There Be Subcontractors?: ☐ Yes ☒ No

\*Will the Project Involve a National Lab/FFRDC?: ☐ Yes ☒ No

\*Is Cost Share Included?: ☒ Yes ☐ No

\*Cost Share Mandatory/Voluntary: ☐ Mandatory ☐ Voluntary

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

Close Proposal Team Budget Sub **Cost Share** Compliance Documents Approvals At Risk << >>

Collapse All

Save and Continue

\*Fiscal Year: 17

Proposal Number: 17-0297 ID: 660

Status: Funded Status Date: 04/26/2019

Proposal Title - Header: multiple pis w cs w sub w ffrdc

Cost Share

PI only has view access of cost share; this information is entered by the Proposal Analyst.

Total Cost Share: \$1,200.00

Cost Share:

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

<input type="checkbox"/> View	Internal/External Cost Share	In-kind or Cash	Amount	Source Index Number	In-kind Type	PI/co-PI Name	PI/co-PI Department	AY Effort Budget Period 1	AY Effort Budget Period 2	AY Effort Budget Period 3
<input type="checkbox"/>	<a href="#">Internal</a>	In-kind	\$1,200.00	123456	AY Effort & Fringe	Fred Research	Chemistry	12%		

Cost share information shown on this page includes:

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





Proposal: Testing Refresh docs

[Edit](#) [Close](#) **Proposal** [Team](#) [Budget](#) [Compliance](#) **Documents** [Approvals](#) [At Risk](#) << >>

[Collapse All](#)

[Save and Continue](#)

Proposal Number: 17-0383 ID: 6223 Fiscal Year: 17  
Status: Proposal Preparation Status Date: 10/18/2019  
Proposal Title - Header: Testing Refresh docs

Proposal Analyst: [Alicia Higginbotham](#)  
Contract Administrator: [Michele Land](#)  
Grant Administrator: [Lisa Martinez Conover](#)

**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..

[Views](#) [Search](#)

<input type="checkbox"/> Document Type	Attached File	Created By	Date Created	Updated By	Date Updated	Proposal Title
<input type="checkbox"/> Current and Pending Support Form	<a href="#">Current and Pending Support - Ida Campus.docx</a>	Kathryn Ginger	10/18/2019 08:19 AM	Kathryn Ginger	10/18/2019 08:19 AM	Testing Refresh docs
<input type="checkbox"/> Current and Pending Support Form	<a href="#">Current and Pending Support - Frederic Sarazin.docx</a>	Fred Research	10/18/2019 08:18 AM	Fred Research	10/18/2019 08:18 AM	Testing Refresh docs

And then click on Edit & Checkout

Current and Pending Support - Ida Campus.docx

[Download/Save](#) [View File](#) [Edit and 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: [Li](#)  
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..

<input type="checkbox"/>	Document Type	Attached File	Created By	Date Created	Updated B
<input type="checkbox"/>	Current and Pending Support Form	<a href="#">Current and Pending Support - Ida Campus.docx</a>	Kathryn Ginger	10/18/2019 08:19 AM	Fred Rese
<input type="checkbox"/>	Current and Pending Support Form	<a href="#">Current and Pending Support - Frederic Sarazin.docx</a>	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](#)  
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..

Show history - Mozilla Firefox

<https://esmsolutions.agiloft.com/ui/tables/record/attach.do?page=40> 97%

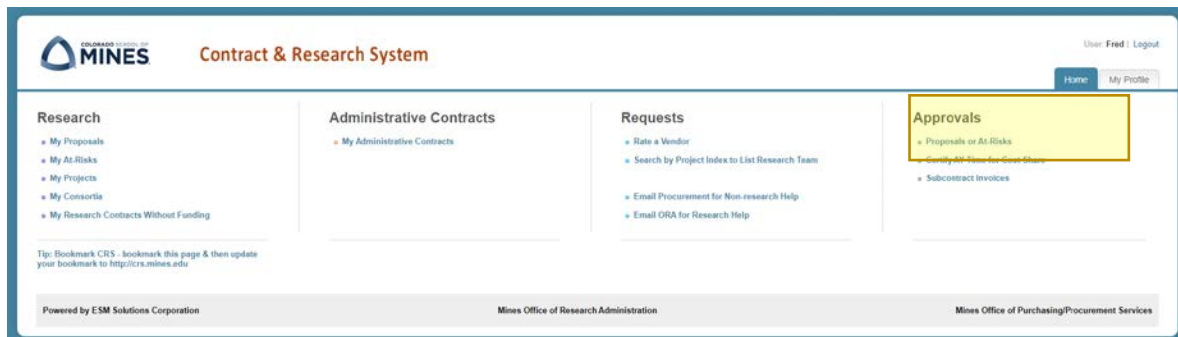
Date Created	Updated B
Oct 26 2019 11:18:36 Updated	<a href="#">Current and Pending Support - Ida Campus.docx</a> 27.4 KBytes fresearch
Oct 18 2019 08:19:40 Created	<a href="#">Current and Pending Support - Ida Campus.docx</a> 20.5 KBytes ginger

[Close](#)



## Approvals

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



### Approvals: My Approvals

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

#### Actions

<input type="checkbox"/>	Related To	Approval Title	Approval Status	Proposal Number	Proposal Role	Sponsor	De Na
<input type="checkbox"/>	<a href="#">Proposals</a>	PI/co-PI Certification	Pending Approval	<a href="#">17-0364</a>	co-PI	Department of Energy	Phy
<input type="checkbox"/>	<a href="#">Proposals</a>	PI/co-PI Certification	Pending Approval	<a href="#">17-0351</a>	PI	National Science Foundation - NSF	Ch
<input type="checkbox"/>	<a href="#">Proposals</a>	PI/co-PI Certification	Pending Approval	<a href="#">17-0350</a>	PI	3D-P	Ch
<input type="checkbox"/>	<a href="#">Proposals</a>	PI/co-PI Certification	Pending Approval	<a href="#">17-0348</a>	PI	BP Alternative Energy	Ch
<input type="checkbox"/>	<a href="#">At-Risk Spend Requests</a>	PI Approval	Pending Approval				
<input type="checkbox"/>	<a href="#">Proposals</a>	PI/co-PI Certification	Pending Approval	<a href="#">17-0338</a>	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](mailto: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

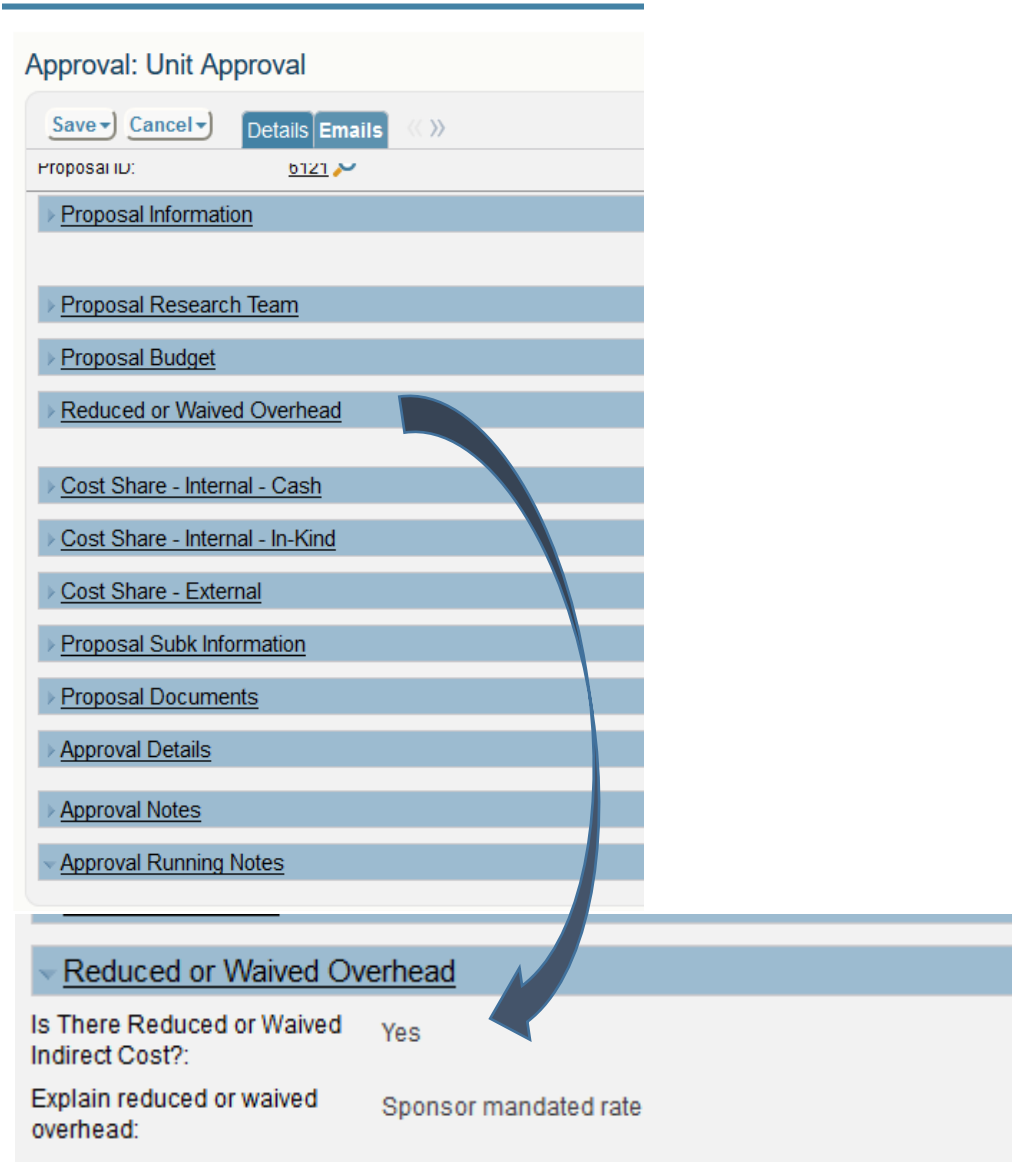
The above proposal has been submitted for routing and needs your approval.

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:



**Approval: Unit Approval**

Save Cancel Details Emails << >>

Proposal ID: 0121

- Proposal Information
- Proposal Research Team
- Proposal Budget
- Reduced or Waived Overhead
- Cost Share - Internal - Cash
- Cost Share - Internal - In-Kind
- Cost Share - External
- Proposal Subk Information
- Proposal Documents
- Approval Details
- Approval Notes
- Approval Running Notes

---

**Reduced or Waived Overhead**

Is There Reduced or Waived Indirect Cost?: Yes

Explain reduced or waived overhead: Sponsor mandated rate

### Approval: Unit Approval

Save

Cancel

Details

Emails

<<

>>

Proposal ID: 0121

- Proposal Information
- Proposal Research Team
- Proposal Budget
- Reduced or Waived Overhead
- Cost Share - Internal - Cash
- Cost Share - Internal - In-Kind
- Cost Share - External
- Proposal Subk Information
- Proposal Documents
- Approval Details
- Approval Notes
- Approval Running Notes

- Cost Share - Internal - Cash
- Cost Share - Internal - In-Kind


Cost Share - Internal - In-Kind:

Status: No records.

- Cost Share - External

Cost Share - External:

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

<input type="checkbox"/>	View	Source of Cost Share	External	In-kind or Cash	In-kind Type	Amount
<input type="checkbox"/>		110 Sunport LLC		Cash		\$1,000.00

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.

Approval: PI/co-PI Certification

Save Cancel Details Emails <>

Proposal Documents

Approval Packet Files - Proposal:

- 190644 Prop.pdf
- 190644 Prop.pdf
- Current and Pending Support - Fred Research.docx

Approval Details

Expand the box to view all uploaded documents

Approval: PI/co-PI Certification

Save Cancel Details Emails <>

Proposal Documents


Approval Packet Files - Proposal:

- 190644 Prop.pdf
- 190644 Prop.pdf
- Current and Pending Support - Fred Research.docx
- Current and Pending Support - Mary Bunch.docx
- Current and Pending Support - Tom Retire.docx

## 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.

 **Contract & Research System**

User Fred | Logout

HOME My Profile

**Research**

- My Proposals
- My At-Risk
- My Projects
- My Consortia
- My Research Contracts Without Funding

**Administrative Contracts**

- My Administrative Contracts

**Requests**

- Rate a Vendor
- Search by Project Index to List Research Team
- Email Procurement for Non-research Help
- Email ORA for Research Help

**Approvals**

- Proposals at At-Risk
- Notify At-Risk for Cost Share
- Subcontract Invoices

Tip: Bookmark CRS - bookmark this page & then update your bookmark to http://crs.mines.edu

Powered by ESM Solutions Corporation Mines Office of Research Administration Mines Office of Purchasing/Procurement Services



## My profile

Employee: Fred Research

[Save](#) [Cancel](#) [Contact Information](#) [Related Information](#) [History](#) << >>

[Collapse All](#)

ID: 26659

Type:

Employee

Work Status: Working

Backup Person:

Special User:

[Save](#) [Cancel](#) [Contact Information](#) [Related](#)

[Collapse All](#)

ID: 26659

Work Status: Working

Backup Person:

Special User:

Employee Information

Work Status:

Out of Office

Backup Person:

Natasha Alizadeh

Input the day you will be returning to the University.

\*Return Date:

01/01/2020

## 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.

[Close](#) [Proposal](#) [Team](#) [Budget](#) [Subk](#) [Cost Share](#) [Compliance](#) [Documents](#) [Approvals](#) [At Risk](#) << >>

[Collapse All](#)

[Save and Continue](#)

\*Fiscal Year: 17

Proposal Number: 17-0315 ID: 700

Status: ORA Approved Status Date: 06/17

Proposal Title - Header: partial pace redo - TEST

[Related At Risk Requests](#)

[Leave this section blank at proposal submission stage.](#)

Related At Risk Requests:

Status: No records.

[New](#) [Find](#) [Views](#) [Search](#)

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

### At Risk Spend Request: 360

[Save](#)
[Cancel](#)

[General Information](#)
[Approvals](#)

[Collapse All](#)

ID: 360

\*Type of At Risk:

☐ New Account  
☐ Continued Spending  
☐ Non-payment  
☐ Consortia Continued Spending

Request Information

\*Requested Amount: \$

\*Requested Start Date:

\*Requested End Date:

Please provide a programmatic justification for work to begin prior to the award documents being received. This justification should be able to be tied to a project. Salaries to a project is not a sufficient reason for At-Risk spending.

\*Programmatic Justification:

Describe your needs (e.g. 1 grad student for 6 months).

Budget Justification:

Once the At-Risk form is complete, click

**Submit to ORA**





## 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

Proposals: My Proposals

Status: More than 100 record(s) found [Click for details...](#) 1 record(s) are selected

Page: [Page 1] [Next](#) [Last](#) Go to page:  [Go](#)

Search:  contains  [Go](#)

[Show All](#) [Refine](#) [String](#) [Context](#) [Active Only](#) [More Options](#) [My Proposals](#)

[New](#) [Views](#) [Search](#) [Copy Proposal](#) [Actions](#)

	Proposal Number	PI Full Name	Status	Proposal Title	Sponsor	Total Budget	Sponsor Deadline Date	Date Submitted to Sponsor
<input checked="" type="checkbox"/>	<a href="#">17-0385</a>	Fred Research	<a href="#">Routing</a>	Testing Approval Email Proposal	3M Company	\$20,000.00	10/31/2019	
<input type="checkbox"/>	<a href="#">17-0383</a>	Fred Research	<a href="#">Proposal Preparation</a>	Testing Refresh docs	3M Company	\$0.00	10/31/2019	
<input type="checkbox"/>	<a href="#">17-0379</a>	Fred Research	<a href="#">Draft</a>	test ffrdc portal	National Science Foundation - NSF	\$0.00	10/22/2019	
<input type="checkbox"/>	<a href="#">17-0384</a>	Tom Retire	<a href="#">Not Funded</a>	Testing for CRS tips and tricks	Department of Energy	\$1,797,423.00	10/04/2019	
<input type="checkbox"/>	<a href="#">17-0351</a>	Fred Research	<a href="#">Routing</a>	tbd	National Science Foundation - NSF	\$2.00	01/01/2020	
<input type="checkbox"/>	<a href="#">17-0350</a>	Fred Research	<a href="#">Withdrawn</a>	sdfg	3D-P	\$0.00	01/01/2020	
<input type="checkbox"/>	<a href="#">17-0377</a>	Fred Research	<a href="#">Proposal Preparation</a>		National Science Foundation - NSF	\$0.00	08/29/2019	

Proposals: My Proposals

Status: More than 100 record(s) found [Click for details...](#) 1 record(s) are selected

Page: [Page 1] [Next](#) [Last](#) Go to page:  [Go](#)

Search:  contains  [Go](#)

[Show All](#) [Refine](#) [String](#) [Context](#) [Active Only](#) [More Options](#) [My Proposals](#)

[New](#) [Views](#) [Search](#) [Copy Proposal](#) [Actions](#)

	Proposal Number	PI Full Name	Status	Proposal Title	Sponsor	Total Budget	Sponsor Deadline Date	Date Submitted to Sponsor
<input checked="" type="checkbox"/>	<a href="#">17-0385</a>	Fred Research	<a href="#">Routing</a>	Testing Approval Email Proposal			10/31/2019	
<input type="checkbox"/>	<a href="#">17-0383</a>	Fred Research	<a href="#">Proposal Preparation</a>	Testing Refresh docs			10/31/2019	
<input type="checkbox"/>	<a href="#">17-0379</a>	Fred Research	<a href="#">Draft</a>	test ffrdc portal			10/22/2019	
<input type="checkbox"/>	<a href="#">17-0384</a>	Tom Retire	<a href="#">Not Funded</a>	Testing for CRS tips and tricks	Department of Energy	\$1,797,423.00	10/04/2019	

Confirm

? You have selected 1 records on which to run this action.

[Run the Action](#) [Cancel](#)

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.

Proposal

[Edit](#) [Close](#) [Proposal](#) [Team](#) [Budget](#) [Compliance](#) [Documents](#) [Approvals](#) [At Risk](#) << >>

[Collapse All](#)

[Save and Continue](#)

Proposal Number: 6228

Status: Draft

Proposal Title - Header:

\*Fiscal Year: 17

ID: 6228

Status Date: 10/21/2019

Proposal Analyst: [Alicia Higinbotham](#)

Contract Administrator: [Michele Land](#)








Grant Administrator: [Lisa Martinez Conover](#)

## 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 .

### Proposals: My Proposals

Status: More than 100 record(s) found [Click for details](#)

Page: [Page 1] [Next](#) [Last](#) Go to page [ ]

[New](#) [Views](#) [Search](#) [Copy Proposal](#) [Act](#)

<input type="checkbox"/>	Proposal Number	PI Full Name	Status
<input type="checkbox"/> 	<a href="#">17-0351</a>	Fred Research	<a href="#">Routing</a>
<input type="checkbox"/> 	<a href="#">17-0350</a>	Fred Research	<a href="#">Withdrawn</a>
<input type="checkbox"/>		Fred Research	<a href="#">Draft</a>
<input type="checkbox"/> 	<a href="#">17-0348</a>	Fred Research	<a href="#">Routing</a>
<input type="checkbox"/>	<a href="#">17-0347</a>	Fred Research	<a href="#">Proposal Preparation</a>
<input type="checkbox"/> 	<a href="#">17-0343</a>	Fred Research	<a href="#">Funded</a>

## Statues:

- 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!