Entering a New Proposal

Advantages of Proposal Tool

The Proposals tool reduces administrative work, increases efficiency, and allows easy and on-demand access for proposal info. The long-term goal is to have information feed into other internal CIRES systems--for example, to have proposal information to feed directly into scientists' ASAs. Specific benefits include:

- Easy and on-demand access to proposal info--no more searching through emails
- Better tracking and transparency for proposals
- Centralized location for important documents such as the proposed budget, with the most recent version instantly available
- Automatic generation of the PSR document, with many fields auto-filled so PIs don't need to enter them
- Proposal info for scientists will to feed directly into ASAs (future enhancement)

Entering a Proposal—Instructions for Science Users

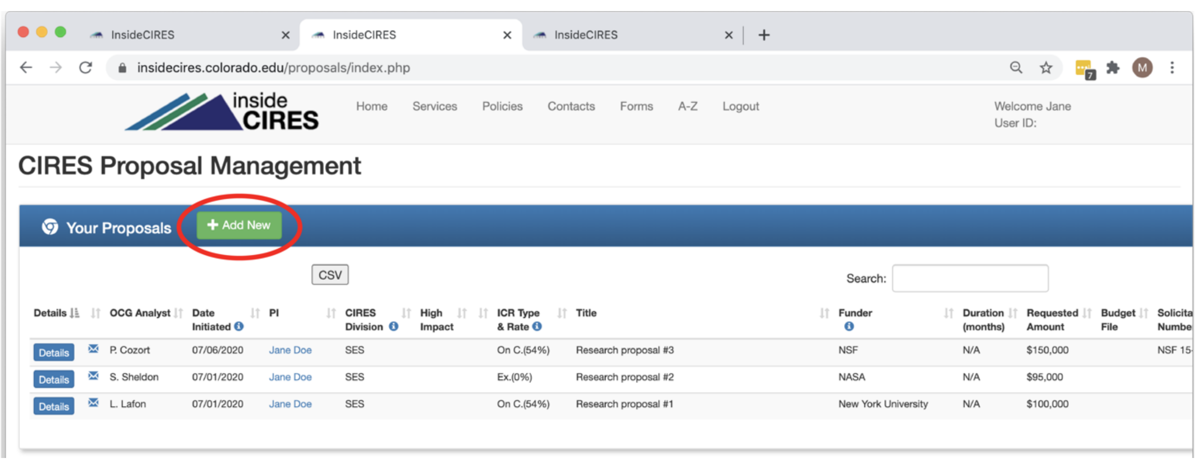
Creating a Brand-new Proposal

Step 1

From the InsideCIRES home page, under “Common Applications,” select “Manage Proposals.”

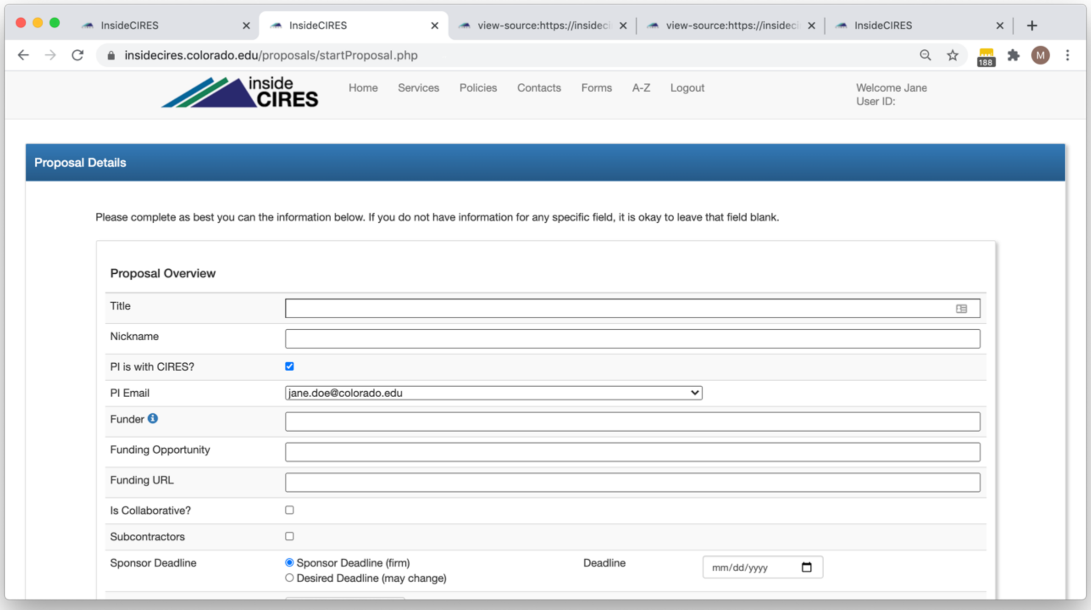
Step 2

Browse to the Proposals List Page at https://insidecires.colorado.edu/proposals. Click on “Add New.”



Step 3

Enter the title. If you do not know the title, it is okay to leave it blank. Enter the other fields to the best of your knowledge. The PI Email will default to your email, but you can change it in the dropdown box.

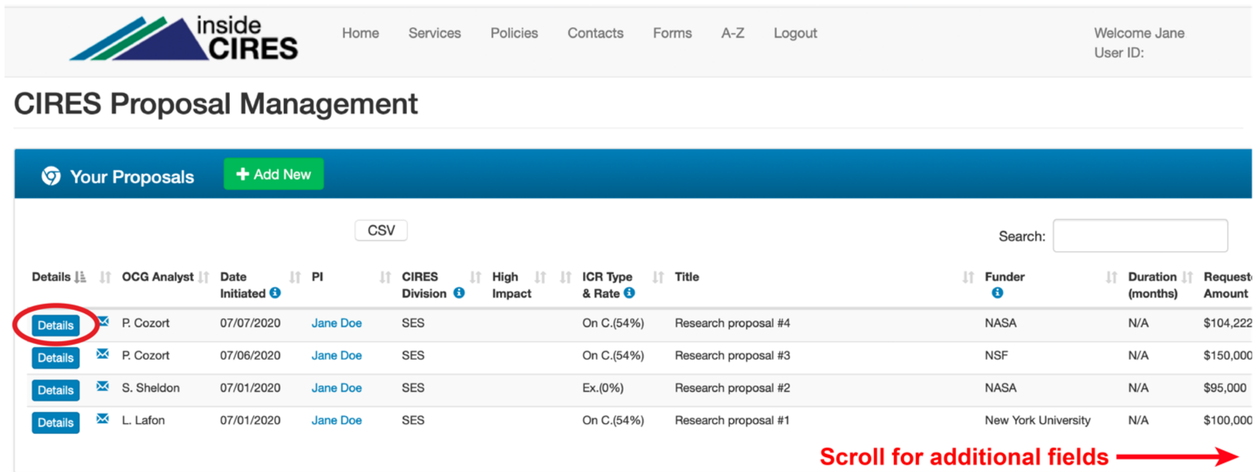


Step 4

Enter whatever information you know about the Funder in the Funder field. Fill in the rest of the fields as best you can. When you are finished, click on “Save” to save the proposal without submitting it, or “Save and Submit” to save the proposal and send it to CIRES Finance.

Step 5

You should now be able see your Proposal on the Proposals List Page. If you submitted the proposal, the status will be “I” (Incomplete). If you have not yet submitted the Proposal, the status will be “U” (Unsent). You can edit the proposal by clicking the “Details” button next to it.



Step 6

Once you've submitted the Proposal, CIRES Finance will assign a Proposal Analyst within one business day. When this happens, you will receive a notification email. The "Details" button on the Proposals List page will also now allow you to see more information about your proposal. The Finance team will help you fill out fields like the Prime Sponsor and Program Office.

See "Proposal Tool Navigation" for additional information on features that are now available.

Copying An Existing Proposal

If your new proposal is very similar to a proposal you've already entered into the tool, you can copy and rename the original proposal. Do to this, use the green "Copy" button on the far right of the proposals list page. Make sure to select the button that is on the proposal row you want to copy.

Important:

Your new proposal will be created with the status **U** (Unsent), meaning that it has not yet been shared with CIRES Finance. To share the proposal with Finace, click on the "Details" button and select "Save and Submit."

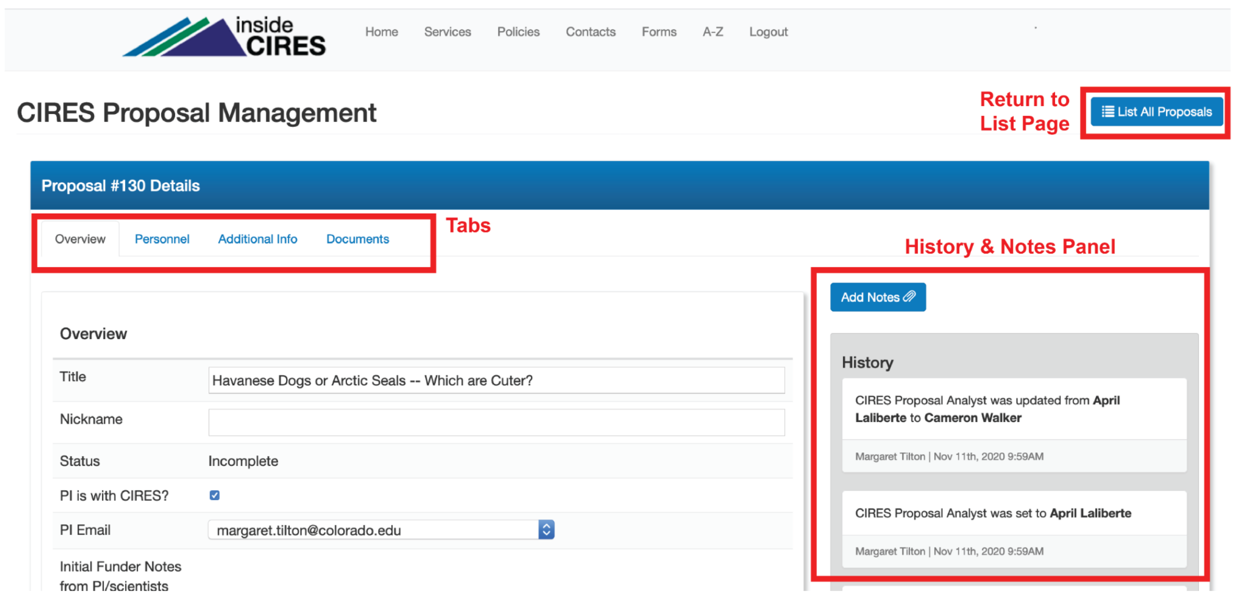
Next Steps

Your assigned Proposal Analyst will contact you about the proposal. In the meantime, you can add information to your proposal using the tabs and panels in the Proposals Tool.

stahdAt some point, your Analyst may lock down the proposal so only the Finance team can write to it. This is so your Analyst can continue preparing the proposal for submission without others making changes. When the proposal is locked down, you will still be able to its information in read-only mode. You will always be able to check the status of your proposal on the Proposal List page.

Proposal Tool Navigation

The "Overview" tab on the far left contains the most important information about your proposal. Other tabs allow you to add personnel, enter information required for the Office of Contracts and Grants (OCG's) Proposal Submission Request (PSR) form, and upload and track documents. On the right side of the Tools window is the "History & Notes" panel. This panel is visible from all tabs.



Some fields have small information buttons available that will show you extra information when you hover over them, e.g.:

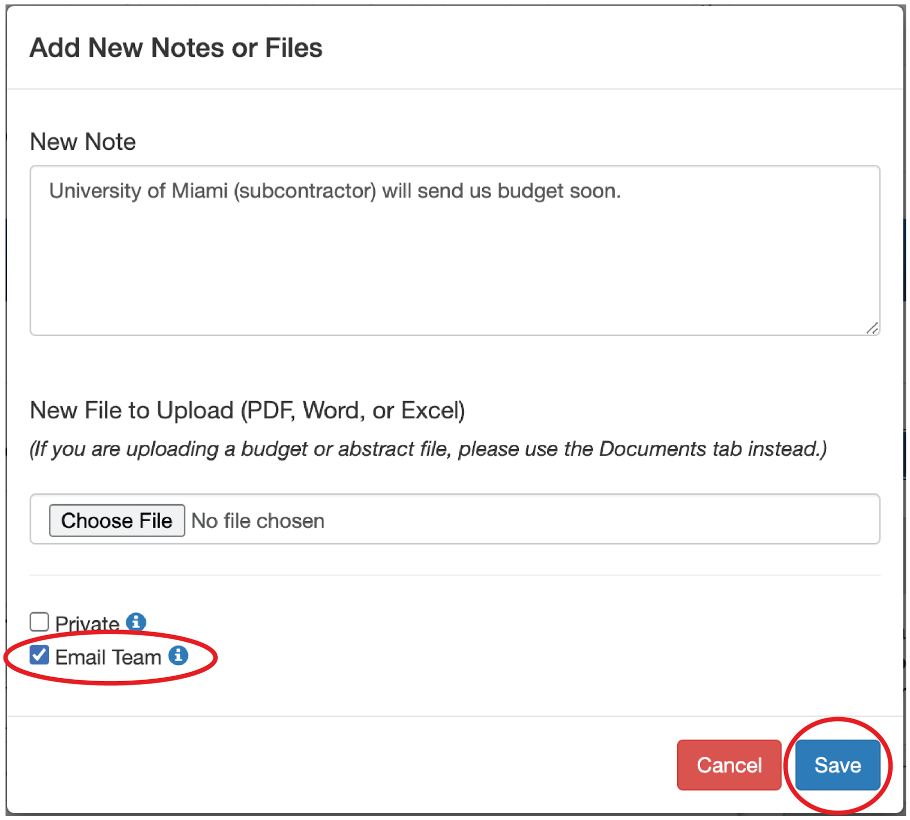
Common Tasks

Contacting your Team

You can email others involved in this proposal through the Proposal Tool. This will preserve a record of your proposal-related discussions in one place. The email will be sent to the PI, the proposal creator (if different than the PI), and the Proposal Analyst. It will also go out to an people you have authorized as editors on the proposal. You will see a list of specific recipients before you confirm the email should be sent.

To do send an email via the Proposals Tool, click on "Add Notes" in the right panel:

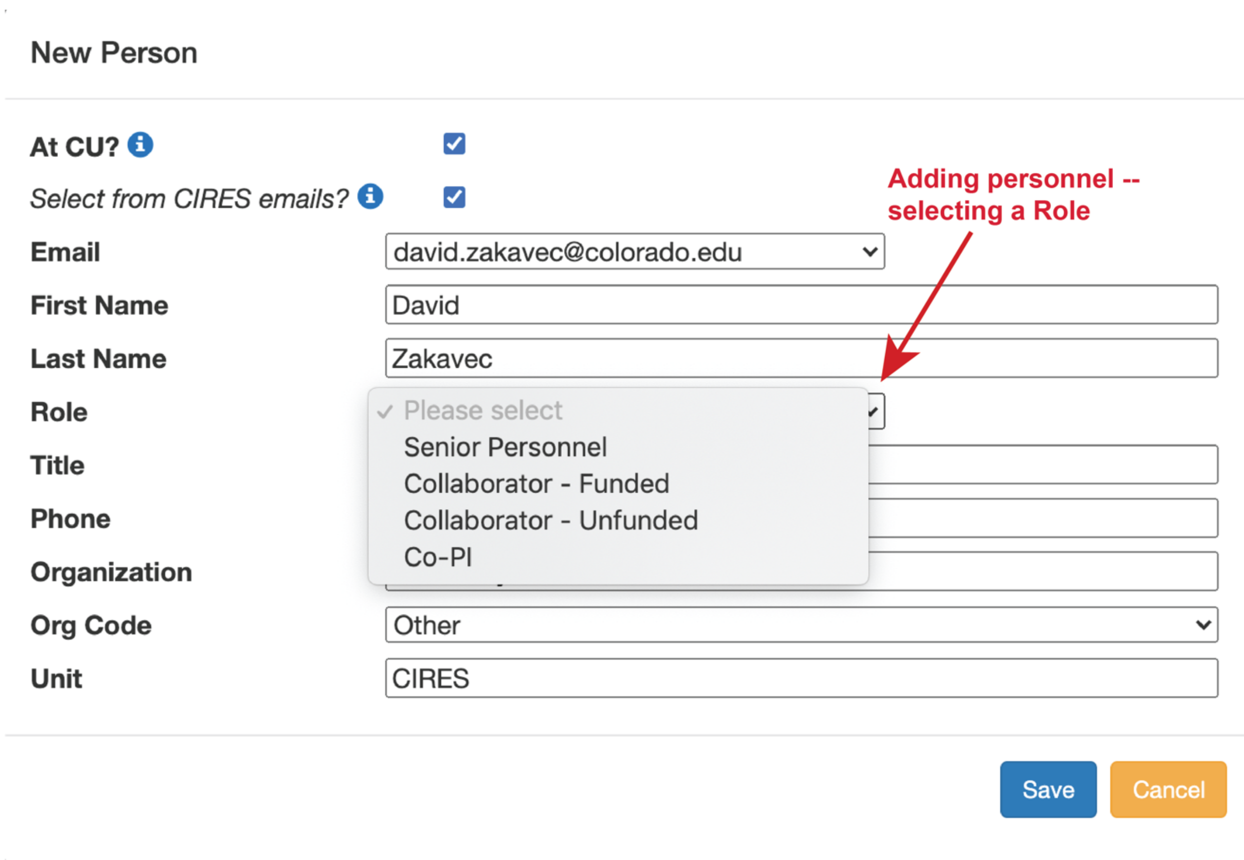
Enter your comment under "New Note." Then locate the "Email Team" checkbox:



If you hover over the "i" button next to "Email Team," a popup will display the people to be emailed. Select the checkbox and click "Save." The History & Notes panel will document that the note has been shared.

Adding Personnel

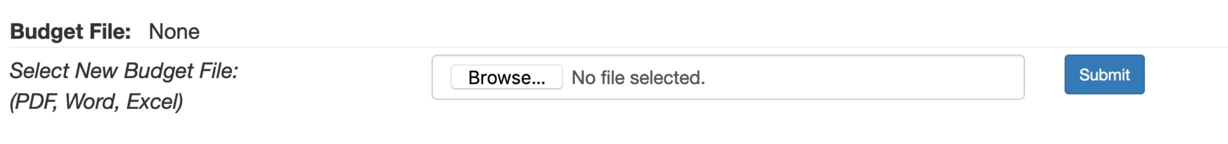
- For all personnel who are not leads at a subrecipient organization, including any colleagues at CIRES, go to the "Personnel" tab and click on "Add Person." A window will pop up where you can enter details. For CIRES personnel, many fields will auto-populate after the email is selected.



- To enter the lead contact at a subrecipient institution, make sure the "subcontractors" checkbox on the "Overview" tab is checked. Then navigate to the "Additional Info" tab and find the "Subrecipients" section. Click on "Add Subrecipient."

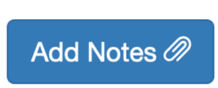
Adding Documents

- Go to the "Documents" tab.
- For proposal abstracts, the main budget document, and the Lab Letter of Support (NOAA proposals only), upload files in the appropriate spot.

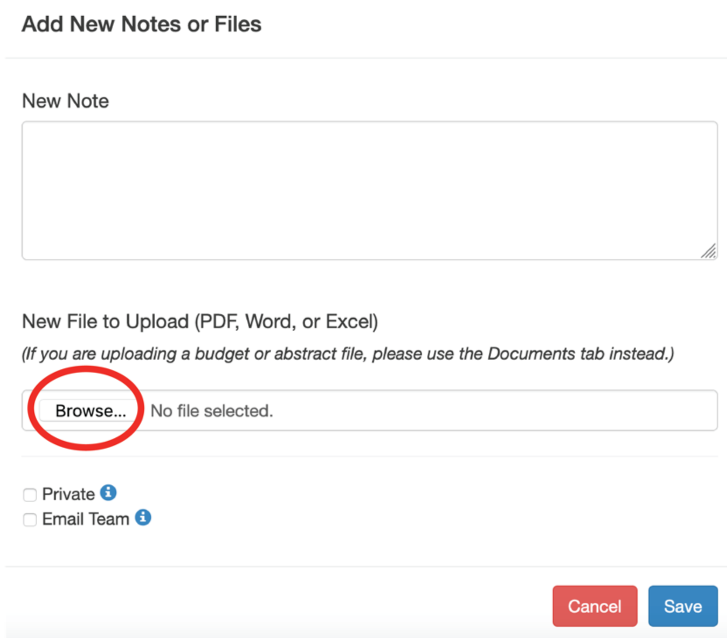


Example: Upload the main budget document by selecting it with "Browse" then clicking "Submit."

- For all other files, click on the Add Notes button on the right panel:



Next, select a file to upload:



If you want to keep the file private, or attach a note, you can also do so on this window. Click "Save" to proceed with the upload and save changes.

At the bottom of the "Documents" tab is a "Document Notes" field. You can use this text area to keep track of required and uploaded documents.

Adding Comments

- To add preliminary notes for your Proposal Analyst, use the "Initial Notes" field when you are entering the proposal for the first time.
- There are several ways to add comments once your CIRES Proposal Analyst has been assigned:
    - To add a short, important note that will appear on the Proposals List page, go to Overview tab > "Pinned Note."
    - To add comments that will appear on OCG's Proposal Submission Request (PSR) form, go to Add Information tab > "Other Information."
    - To add comments related to required documents, go to Documents tab > "Document Status."
    - To add general comments, use the "Add Notes" panel on the right side of the Tools window.

Need Additional Help?

Please contact the CIRES Proposals team with any questions or comments you may have on proposals:
Email: CIRESProposals@colorado.edu

You may also contact CIRES IT about questions on the InsideCIRES proposals software:
Email: ciresithelp@colorado.edu
Phone: 303-735-4200