

Entering a New Proposal

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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.”

Common Applications

Travel Submission	Submit Travel	
Career Track	Click Here to Start	Information
Proposals	Manage Proposals	

Step 2

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

The screenshot shows the InsideCIRES Proposals Management interface. At the top, there is a navigation bar with the InsideCIRES logo and links for Home, Services, Policies, Contacts, Forms, A-Z, and Logout. Below the navigation bar, the page title is "CIRES Proposal Management". A blue banner contains "Your Proposals" and a green "+ Add New" button, which is circled in red. Below the banner, there is a search bar and a "CSV" button. A table lists three proposals with columns for OCG Analyst, Date Initiated, PI, CIRES Division, High Impact, ICR Type & Rate, Title, Funder, Duration (months), Requested Amount, Budget File, and Solicitation Number.

Details	OCG Analyst	Date Initiated	PI	CIRES Division	High Impact	ICR Type & Rate	Title	Funder	Duration (months)	Requested Amount	Budget File	Solicitation Number
Details	P. Cozort	07/06/2020	Jane Doe	SES		On C,(54%)	Research proposal #3	NSF	N/A	\$150,000		NSF 15
Details	S. Sheldon	07/01/2020	Jane Doe	SES		Ex,(0%)	Research proposal #2	NASA	N/A	\$95,000		
Details	L. Lafon	07/01/2020	Jane Doe	SES		On C,(54%)	Research proposal #1	New York University	N/A	\$100,000		

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.

insidecires.colorado.edu/proposals/startProposal.php

inside CIRES Home Services Policies Contacts Forms A-Z Logout Welcome Jane User ID:

Proposal Details

Please complete as best you can the information below. If you do not have information for any specific field, it is okay to leave that field blank.

Proposal Overview

Title	<input type="text"/>
Nickname	<input type="text"/>
PI Is with CIRES?	<input checked="" type="checkbox"/>
PI Email	<input type="text" value="jane.doe@colorado.edu"/>
Funder	<input type="text"/>
Funding Opportunity	<input type="text"/>
Funding URL	<input type="text"/>
Is Collaborative?	<input type="checkbox"/>
Subcontractors	<input type="checkbox"/>
Sponsor Deadline	<input checked="" type="radio"/> Sponsor Deadline (firm) <input type="radio"/> Desired Deadline (may change)
Deadline	<input type="text" value="mm/dd/yyyy"/>

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.

Save Save & Submit

Step 5

You should now be able to 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.

CIRES Proposal Management

Your Proposals + Add New

CSV Search:

Details	OCG Analyst	Date Initiated	PI	CIRES Division	High Impact	ICR Type & Rate	Title	Funder	Duration (months)	Request Amount
Details	P. Cozort	07/07/2020	Jane Doe	SES		On C.(54%)	Research proposal #4	NASA	N/A	\$104,222
Details	P. Cozort	07/06/2020	Jane Doe	SES		On C.(54%)	Research proposal #3	NSF	N/A	\$150,000
Details	S. Sheldon	07/01/2020	Jane Doe	SES		Ex.(0%)	Research proposal #2	NASA	N/A	\$95,000
Details	L. Lafon	07/01/2020	Jane Doe	SES		On C.(54%)	Research proposal #1	New York University	N/A	\$100,000

Scroll for additional fields

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.

Comments	Cost Share	Proposal #	DAICR Loss	Copy	Remove
				Copy	Remove
				Copy	Remove
TEMPEST Industry Project				Copy	Remove

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 Finance, 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.

At 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 view 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.

The screenshot shows the CIREs Proposal Management interface. At the top, there is a navigation bar with the CIREs logo and links for Home, Services, Policies, Contacts, Forms, A-Z, and Logout. Below this, the page title is "CIREs Proposal Management". On the right side, there are two buttons: "Return to List Page" and "List All Proposals". The main content area is titled "Proposal #130 Details" and features a "Tabs" section with "Overview", "Personnel", "Additional Info", and "Documents". The "Overview" tab is selected, showing fields for Title, Nickname, Status, PI is with CIREs?, and PI Email. The "History & Notes Panel" is visible on the right, containing an "Add Notes" button and a "History" section with two entries.

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

OCG Notified 

Common Tasks

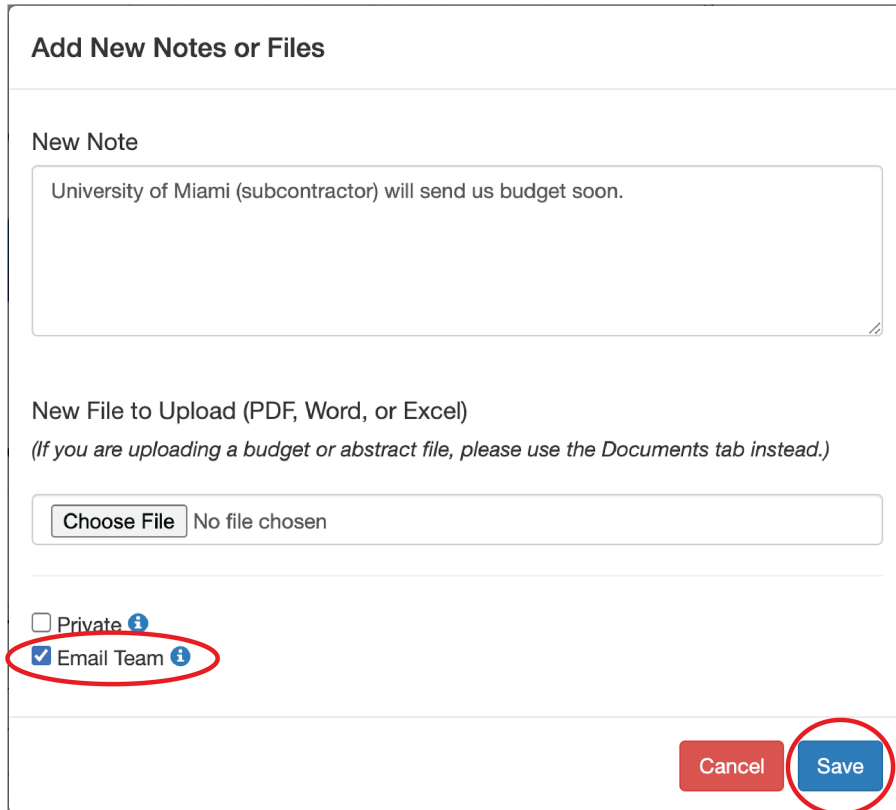
Contacting your Team

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 any 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:

Add Notes 

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




Add New Notes or Files


New Note

University of Miami (subcontractor) will send us budget soon.

New File to Upload (PDF, Word, or Excel)
(If you are uploading a budget or abstract file, please use the Documents tab instead.)

Choose File No file chosen

Private 

Email Team 

Cancel Save

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.

New Person

At CU? [i](#)

Select from CIRES emails? [i](#)

Email david.zakavec@colorado.edu

First Name David

Last Name Zakavec

Role Please select

Title Senior Personnel

Phone Collaborator - Funded

Organization Collaborator - Unfunded

Org Code Co-PI

Org Code Other

Unit CIRES

Adding personnel -- selecting a Role

- 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.

Budget File: None

Select New Budget File:
(PDF, Word, Excel)

No file selected.

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:

Add New Notes or Files

New Note

New File to Upload (PDF, Word, or Excel)
(If you are uploading a budget or abstract file, please use the Documents tab instead.)

Browse... No file selected.

Private ⓘ
 Email Team ⓘ

Cancel Save

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