CRMS - Steps to enter a resolution

This document is intended to walk you through the basics of entering a resolution. It does not cover everything you need to know about the CRMS application but should be a good basic guide to getting a new resolution into the system.

How to enter a resolution:

1. Access the Website:
   If you are a county employee, you should have a link from the portal. You can also copy this link into your browser http://crms.franklincountyohio.gov/RMSWeb/

2. If you are not entering from the portal, enter your user id and password and click the submit button. If entered properly your Agency Workspace will be displayed.

3. Click the "Create Resolution" button
   The button is on the left side of the page. Once you do this, you will see the "Create a Resolution" page.

4. Pick a General Session Date
   Either key in a date in the General Session Date field or click on the Calendar box and select a date from the calendar that is displayed. If you key it in, the format must be mm/dd/yyyy so December 31, 2008 would be entered as 12/31/2008.

5. Key in a Workspace Title
   This is the Title for the Resolution that will be seen when searching for the resolution or in workspaces. It does not appear in the resolution itself. It should uniquely identify your resolution and match closely the title used by your agency.

6. Key in the Resolution Title (short description)
   This is the Resolution description that prints in the agenda. The easiest way to enter the Resolution Title is to copy it from your resolution Word document and paste it into the Resolution Title text box. If you reload your resolution Word document, you should re-copy the text from your resolution Word document if that section was changed. Resolution Title should not be keyed into the Resolution Title text box directly because the content there should match the text in your Word document exactly.

   Note, do not include agency name and dollar amount in the Resolution Title text box.

7. Attach your Resolution Word document
   Above the Browse button, there are two lines that show the status of your resolution documents. The first shows if you have your resolution Word document (Working Draft) loaded into CRMS. The second shows if this version of the document (Final Copy) has been accepted by the Clerk.

Resolution Document	**Status**
Working Draft	Not Loaded
Final Copy	Not Accepted

   Click the browse button and select your resolution. Once you have done that, click the Save button and your resolution will be uploaded to the system. If you need, you can repeat this process to replace the document with an updated one.

8. Select an Agency
   To select an Agency, click the drop-down box and click on the appropriate agency. (The one the resolution is being submitted for)

9. Key in an Amount
   Key in the dollar Amount requested in the Resolution

10. Attach Supporting Documents
    - Click on the Attach Documents button. This will display the Attach Supporting Documents Page.
    - Click the Browse button and select the PDF you want to attach. The name of the PDF document will be seen later when people display supporting documents so please name them with a description that makes sense.
    - Select a document type by clicking the type drop-down box.
    - Key in a description for the Resolution.
    - Click the Attach Button to upload the PDF, once uploaded, the PDF will be listed in the Manage Attached Documents section in the bottom half of the page.
    - To re-order the attachments, see the Rearranging Supporting Documents section below.
    - Repeat the process until all PDFs are loaded then click the Return button.

    Rearranging Supporting Documents:
    The attached documents will display and print in the order they are listed in the Attach Supporting Documents Page. To re-order the attachments, change the numbers in the Order Column to the left of each attachment to the order you want them to appear and click the Resort button. This will re-order your attachments based on the numbers you entered.