

CRS Home Page

The Mines Contract & Research System (CRS) is located at: <https://esmsolutions.enterprisewizard.com/gui2/samlssologin.jsp?project=Mines Production&State=Main&euiurl=/eui2template/main.php>. Login with your MultiPass credentials. The CRS home page looks like:



Make sure your browser allows pop-ups. If necessary, google “enable pop ups” for your browser (e.g. Firefox) and follow the directions.

Start a Contract

Click "Start a Contract" to initiate contract requests for either procurement or facilities use. For all other, non-research related contracts, contact the appropriate campus office (below) to initiate a contract request.

- Athletics and Recreational/Club Sports
- Campus Events
- Continuing and Professional Education Services
- Design and Construction
- Legal Services
- Technology Transfer

Before starting a procurement contract request, you are required to [submit a requisition](#) to procurement. In the "Start a Contract" view (below), only complete content under the "Contract Details" tab.

- **Contract Details:** Contains all the required fields you must complete to initiate the contract request.
- **Purchase Orders:** If this contract request becomes an active contract, this tab will contain purchase order information.
- **Related and Renewal Contracts:** Associate the new contract with a parent contract or if renewing, associate it with the expired contract.
- **Approvals:** All approvals associated with this contract reside under this tab. You can track the progression of your approvals.

Completing Contract Information



Step 1: Contract Owner Section

The contract owner section automatically populates with your organizational information from Banner. Please contact HR/Payroll to update if needed.

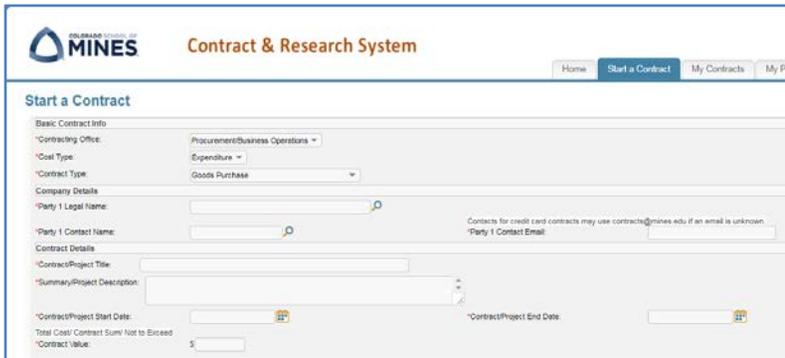
If you are starting a contract on behalf of someone else (e.g. department head, faculty member), change the Owner Name field to them by using the search magnifying glass to find their name.

If the contract will be run through a center, be sure to select the center.

Step 2: Basic Contract Info

All blank fields with a red asterisk are required (below) and must be completed before you will be allowed to save or submit the contract.

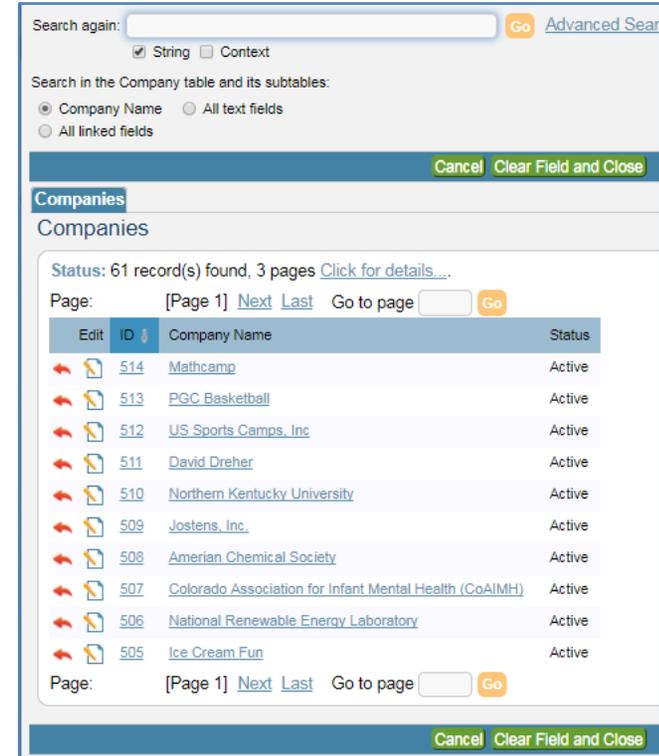
1. Complete the Contracting Office field first, either Procurement or Facilities Use.
2. Then select the Cost Type, either Revenue or Expenditure.
3. Then choose the Contract Type.



Step 3: Company Details Section – Party 1 Legal Name

Before completing company/vendor information, the vendor must be in Banner. Therefore, if you are unable to find your company/vendor submit a W-9 to procurement@mines.edu and it will be created. Otherwise complete vendor information as described below:

1. Click on the search magnifying glass next to the Party 1 Legal Name field.
2. A new window opens with a list of vendor/company names (at right).
3. Use the search box at the top of the screen to search company names
4. Toggle to All Text Fields if you want your search to include other fields like the vendor's ID, address, phone, email, etc.
5. When you find your company, click the red arrow to the left of their name to populate the field of Party 1 Legal Name.



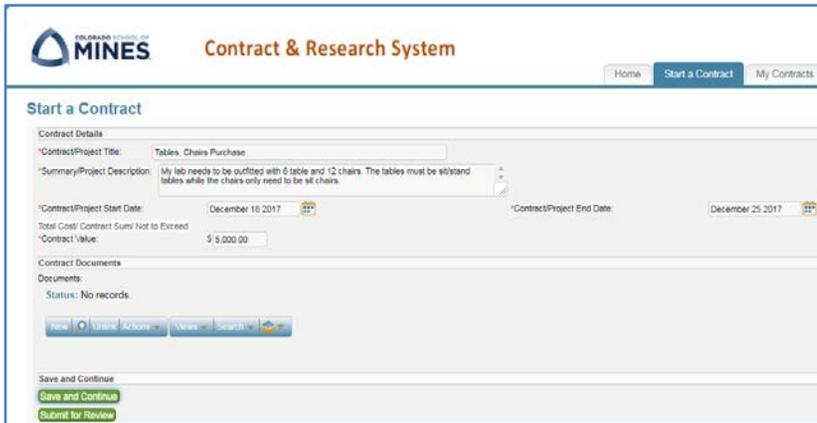
Step 4: Company Detail Section – Party 1 Contact Name

For some vendors/companies, the contacts may reside in the CRS.

1. Click on the search magnifying glass next to the Party 1 Contact Name field.
2. A new window opens with a list of contacts for the vendor/company. There may or may not be some contacts.
3. If you find your contact in the new window, click the red arrow to the left of their name. Otherwise, click the green Cancel button.
4. If you do not find your contact in the list, manually type in their name and email address.

Step 5: Contract Details Section

This section describes the purpose, dates and dollar amount of your contract. If you have this information in a separate document, you will still need to provide a brief summary here. You may then upload your document under the Contract Documents section described in the Step 6.



Contract & Research System

Home Start a Contract My Contracts

Start a Contract

Contract Details

*Contract/Project Title: Tables, Chairs Purchase

*Summary/Project Description: My lab needs to be outfitted with 6 table and 12 chairs. The tables must be sit/stand tables while the chairs only need to be sit chairs.

*Contract/Project Start Date: December 10 2017

*Contract/Project End Date: December 25 2017

Total Cost/ Contract Sum/ Not to Exceed

*Contract Value: \$ 5,000.00

Contract Documents

Documents:

Status: No records

Save and Continue

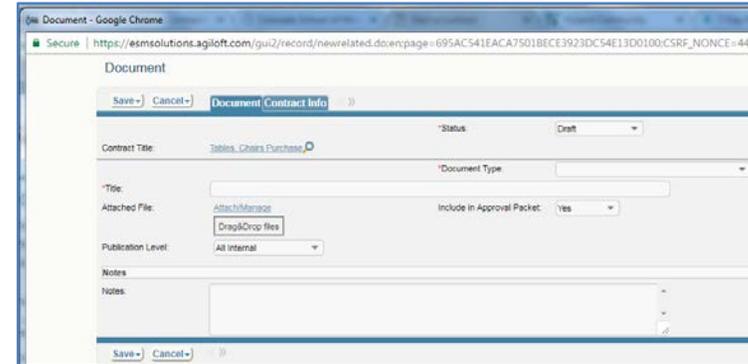
Save and Continue

Submit for Review

Step 6: Contract Documents

To add a statement of work or other detailed information that you have in another document, follow the steps below.

1. Click on New. A new window opens (see top right image).
2. Complete a title for your document.
3. Select the type of document you are uploading.
4. Then drag your document to the box that says Drag&Drop files.
5. When the Drag&Drop box turns red, you will see your document attach to this screen.
6. Then click Save.
7. Your document attaches to the Start a Contract view (see lower right image).



Document - Google Chrome

Secure | https://esmsolutions.agiloft.com/gui2/record/newrelated.doc?ncpage=695AC541EACA7501BECE3923DC54E13D0100.CSRF_NONCE=441

Document

Save- Cancel- Document Contract Info

Status: Draft

Contract Title: Tables, Chairs Purchase

Document Type: [Dropdown]

Title: [Text Field]

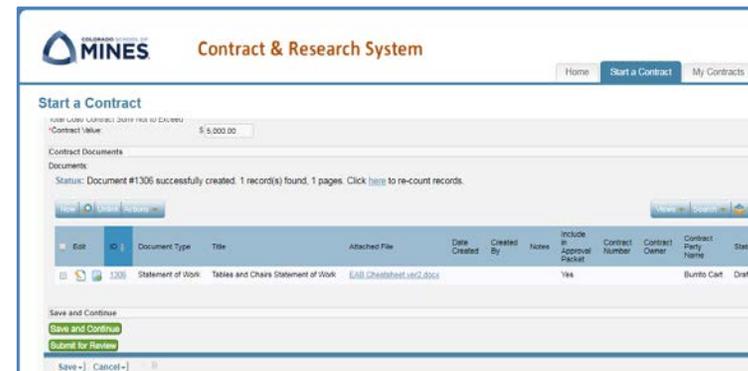
Attached File: Attach/Manage [Drag&Drop files]

Publication Level: All Internal

Include in Approval Packet: Yes

Notes: [Text Area]

Save- Cancel-



Contract & Research System

Home Start a Contract My Contracts

Start a Contract

Your Latest Contract Drafts Not to Exceed

*Contract Value: \$ 5,000.00

Contract Documents

Documents:

Status: Document #1306 successfully created. 1 record(s) found. 1 pages. Click [here](#) to re-count records.

Save and Continue

Save and Continue

Submit for Review

Save- Cancel-

Document Type	Title	Attached File	Date Created	Created By	Notes	Include in Approval Packet	Contract Number	Contract Owner	Contract Party Name	Status
1306	Statement of Work: Tables and Chairs	Statement of Work: Tables and Chairs				Yes		Bunton Carr		Draft

Step 7: Save or Submit

You are ready to save or submit your contract request:

1. **Save and Continue** – saves the record as a draft and allows you to continue working. All required fields must be completed before save.
2. **Submit for Review** – saves and submits your contract request to the procurement.
3. **Save** – saves your contract request and returns you to the CRS home page. You must still submit your contract request.
4. **Cancel** – cancels your contract request and all work is lost.