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General Principles Manual



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General principles manual

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1. Introduction

1.1 Document history

Date	Version	Action
27/01/2006	2.01	First version
25/08/2006	2.02	Update of document format
22/09/2006	2.03	Intranet homepage changes
08/06/2007	2007.02.001	Minor corrections
06/2009	09.03	Update of manual to be consistent with current version
07/2010	09.10	Correction of the reference of the instruction note on attached documents
04/2014	14.01	General update of the manual
11/2014	14.02	Update of business rules for persons in charge for transactions under the 'PI' domain.
04/2016	15.01	Update with Release FIN 15.01 (migration of Financial modules to ABAC)

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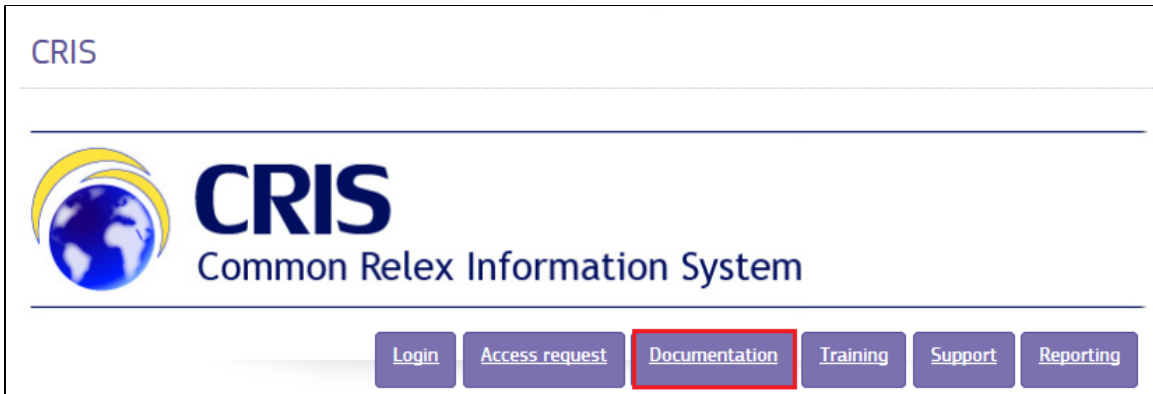
1.2. Purpose of the manual

The aim of the "General Principles" manual is to explain the different concepts and functions found in most modules of CRIS. Once familiar with these, you will find it easy to use most of the modules without any special help.

Please refer to the relevant manuals for explanations regarding concepts and functions more specific to certain CRIS modules.

You can find the CRIS user manuals in three ways:

1. From DEVCO's Intranet: Click on "CRIS" in the "DEVCO Tools" menu and select "Documentation":



2. From the application itself, by accessing the **Help > General Documents** left menu: in the right part of the screen you have a direct link to the **Manuals** page of the DEVCO Application Knowledge Base:

Help	Automatic	Mandatory	Document title	Language	Document type	Date of update
General Documents			01 You can now find the CRIS documentation on our brand new CRIS Knowledge base!			
Helpdesk Headquarters			02 La documentation CRIS est maintenant disponible à partir de la base de connaissance CRIS!			
Helpdesk Delegations						

3. From **DEVCO APPLICATION Knowledge Base > Welcome > CRIS > Documentation > Manuals**. The manuals are organised by module and are available in English and French:

Dashboard > DEVCO APPLICATION Knowledge base > ... > List of Deputy USMs

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- ☐ **General Principles Manual**
- ☐ Programming manual
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- ☐ Legal Entity File Manual
- ☐ Negative Payments Manual
- ☐ Programme Estimates manual
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2 Added by [nblgacy](#), last edited by [Ana MASALAGIU](#) on 24 Feb 2014 ([view change](#))

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4. From DEVCO's Intranet, by selecting "DEVCO APPLICATION Knowledge Base" dans "DEVCO Tools":

Quick Links

DEVCO Tools



[AUDIT module](#)

[BPC Forecasting](#)

[Capacity4Dev](#)

[CRIS](#)

[Dashboards and Reporting catalogue](#)

[DEVCO APPLICATION Knowledge Base](#)

[DEVCO Companion](#)

[EAMR](#)

[EAMR-HQ](#)

[EuropeAid Atlas](#)

[EVAL module](#)

[PADOR](#)

[PRAG](#)

[PROSPECT](#)

[QSG Meetings](#)

[ROM module](#)

You will be directed to the **CRIS welcome page** of the DEVCO Application Knowledge Base:

CRIS

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34 Added by Mohamed GARGOURI, last edited by Paula-Madalina NEACSU on 27 Dec 2013 ([view change](#))

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I am looking for...

CRIS (Common Relax Information System) reflects the implementation the financing rules and procedures for the external actions of the European Communities. The purpose of the CRIS pages is to provide CRIS community with a tool covering all CRIS-related information. Therefore, if you find it relevant to add any other type of information to this Knowledge base, please do not hesitate to contact your USM so that he/she can forward us your suggestion.



CRIS release notes

Contains explanatory notes on new functionalities in all CRIS modules



CRIS Manuals

Corresponding manual of each CRIS module



Glossaries

Contains glossaries with the explanation of fields for CRIS modules



CRIS Slideshows

Corresponding presentations of the main CRIS modules

Manuels

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29 Added by Thomas SMALL, last edited by Paula-Madalina NEACSU on 03 Apr 2014 ([view change](#))

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Liste des manuels CRIS

Veillez trouver ci-dessous la liste des manuels CRIS. Cliquer sur un manuel pour consulter le document correspondant

[Manuel Appel à Propositions - Appel d'Offres](#)

Version: 14.01
Date de publication : Janvier 2014

[Manuel Aspects généraux](#)

Version: 09.06
Date de publication : Juillet 2010

[Manuel CRIS Audit](#)

Version: 09.03
Date de publication : Avril 2009

[Manuel Contrats-Cadre](#)

Version: 14.01
Date de publication : Janvier 2014

[Manuel Contrats](#)

Version: CTR 14.01
Date de publication : Janvier 2014

Each manual has a contents structured by **chapters available in web format**. Each chapter title is a **hyperlink**. Click on the hyperlink to access a certain chapter in Web format.

Should your internet connection be slow, you have also the possibility to upload the whole manual in **PDF version**:

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3. Switch language



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1.3 Who does what and user support

1.3.1 Users

Anyone who uses CRIS, whether to consult or to enter data, is a user.

1.3.2 Security management: Local Profile Managers (LPMs)

For security management (granting permissions), a hybrid model is in force for the time being for the DEVCO IT applications:

1. For DEVCO B + C, DEVCO G, DG ELARG, DG ECHO and FPI one or more LPM(s) (who is in most of cases the same with the User Services Manager - USM) is appointed, working under the Director's authority. LPMs give permissions to CRIS users in their Directorate and to users in delegations falling within the geographical area of their Directorate.
2. For the directorates other than those mentioned at point 1, any permission request must be addressed to the **DEVCO Application Support** functional mailbox.

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1.3.3 First level support requests: USM / DEVCO Application Support

The first-level support requests are handled, according to the same hybrid support model, by:

1. For some directions, a **USM** is appointed on behalf of each DEVCO directorate or other DG of the ex-RELEX family (e.g.: ECHO, ELARG, FPI). For the time being the users requests are addressed at a first level by **USMs** for the following directorates and DGs: **DEVCO B + C**, **DEVCO G**, **DG ELARG**, **DG ECHO** and **FPI**. You can consult the **USM page** for more details.

USMs are well acquainted with CRIS functions and, together with the DEVCO Application Support team, provide the following services:

- 1) Voicing the needs of users in their Directorate/DG in CRIS User committees;
 - 2) Organising data entry;
 - 3) Ensuring functional support when users need it;
 - 4) Promoting the system to users by explaining its functions;
 - 5) Coordinating training needs: coaching users, advising new colleagues on the CRIS courses they should follow, organising any training within their Directorate, supporting and training users in delegations.
2. For other directorates (other than those mentioned at point 1 of this chapter), users shall address their request to the functional mailbox **DEVCO APPLICATION Support**.

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1.3.4 Deputy USM in the delegation

A deputy USM is appointed in each delegation. He/she provides the same service to users in that delegation as the USM in headquarters. He/she is the first contact in case of problem with CRIS within the delegation. For details on whom to contact, please refer to the [Deputy USM page](#).

1.3.5 System Supplier: DEVCO's IT Unit

The role of DEVCO's IT Unit role is to ensure the technical development, maintenance and availability of the system and data backup. The **DEVCO APPLICATION Support** team deals with calls from USMs, deputy USMs and final users. The DEVCO Application Support team is contacted by both final users and USMs (for directorates having an USM) for first-level support requests.

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1.3.6 Summary of CRIS support procedures

1st level: Delegation users call the deputy USM of their delegation. Headquarters users or Deputy USM call the USM of their directorate or the DEVCO Application Support team

2nd level: If not able to solve the request the USM or the DEVCO Application Support team contact the level-2 support team of DEVCO's IT unit.

1.3.7 List of LPMs, USMs and Deputy USMs for CRIS

You can access the contract information of the first-level support services from the **DEVCO APPLICATION Knowledge Base > CRIS > USM > List of USMs/List of Deputy USMs** depending on where you work.

Another way of accessing the list of USMs and LPMs, is via the EuropeAid intranet homepage. Click on the CRIS menu and select the CRIS Helpdesk sub-menu.

- ▼ WELCOME
 - › DEVCO IT - General Information
 - › AUDIT (EN)
 - › [BPC - Financial Forecasting](#)
- ▼ CRIS (EN)
 - › CRIS Documentation
 - CRIS Training & eLearning
- ▼ USM
 - [List of USMs](#)
 - [List of Deputy USMs](#)
 - › [DEVCO CRIS USM DIR D-E \(EN\)](#)
 - CRIS USM Committee
 - [How to request access to CRIS](#)
 - › [List of current problems](#)

The above 2 methods all lead you to the following page where you can consult the names and contact information of the first-level support team: USM or the DEVCO Application Support team.

If you work at Headquarters, you can view the name(s) of your **LPMs/USMs** or of the DEVCO Application Support team and their corresponding functional mailboxes:

List of USMs

Added by Thomas SMALL , last edited by Hector PRADO on 27 Jan 2014 11:02

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Helpdesk for Headquarters: LPMs & USMs

The **LPM (Local Profile Manager)** is in charge of granting CRIS permissions to the users of its Directorate and of the Delegations of its geographical field.

The **USM (User Service Manager)** has to ensure the following tasks:

1. Provides first-level functional support,
2. Forwards incidents to the [DEVCO APPLICATION SUPPORT](#) which provides second-level support,
3. Takes part in the USM Committee and reports the problems encountered by the users and any query for RFC (Request for change)
4. Promotes the system to users by explaining how it works,
5. Coordinates training,
6. Informs users of any change to CRIS and forward any new information or manual.

Direction/DG	Name	Unit	Phone	Functionnal Mailbox	USM	LPM
DEVCO A	Devco Application Support	R6	99000	DAS	Y	Y
DEVCO R	MAHLBERG Gudrun	R5	91400		Y	Y
DEVCO 01 - 08 Task Forces	KIRSTETTER Manuel	R5	60082		Y	Y
DEVCO B + C	VAN VLASSELAER Edouard	B6	96524	DEVCO CRIS USM DIR B-C	Y	Y
	CARTON Vincent (back up)	B6	99684		Y	Y
	FONDU Nicole (back up)	B6	98816		Y	Y
DEVCO D + E	ATANASOVA Tina	E4	87277	DEVCO CRIS USM DIR D-E	Y	Y
	PODOCEA Cristina	E4	57044		Y	Y
	PRUNDUREL DUMITRESCU Adrian Alexandru	E4	57894		Y	Y
	COTROBESCU Sabrina	E4	95355		Y	
	DVORETSKAYA Olga	E4	84758		Y	
	MIHU Mihaela	E4	51574		Y	
	PAPATHEOCHARI Catherine	E4	81778		Y	
	VANDENBOSCH Jean-Marc	E4	54929		Y	
	TOADER Daniela	E4	99326		Y	Y
		E4	66453			

If you work in delegations, please address your request/question to your **Deputy USM**:

List of Deputy USMs

Added by Thomas SMALL , last edited by Hector PRADO on 10 Jan 2014 16:16

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Helpdesk for delegations: Deputy USMs

A **Deputy USM** is designated for every deconcentrated delegation that uses CRIS. Deputy USMs have the same tasks as Head Office USMs for the CRIS users of the delegation that they represent.

Direct link to delegations: [#A](#) - [#B](#) - [#C](#) - [#D](#) - [#E](#) - [#F](#) - [#G](#) - [#H](#) - [#I](#) - [#J](#) - [#K](#) - [#L](#) - [#M](#) - [#N](#) - [O/P](#) - [O/R](#) - [#S](#) - [#T](#) - [#U](#)

Delegation	Country code	DG/Direction	Phone	Deputy USM
DEL Afghanistan	AF	DEVCO H	*81454	RASULI Haseeb MISKEENYAR Mohammad Nabeel DELEGATION AFGHANISTAN CRIS USM
DEL African Union	OUA	DEVCO E		MUGENZI GANYANA Georges (EEAS-ADDIS ABEBA) DELEGATION AFRICAN UNION CRIS USM
DEL Albania	AL	DG ELARG	*80842	GACEM Lies KAJA Iliriana DELEGATION ALBANIA CRIS USM
DEL Algeria	DZ	DEVCO F	*80720	DELEGATION ALGERIA CRIS USM
DEL Angola	AO	DEVCO E	*80581	ARZILLO Elisabetta (EEAS-LUANDA) DELEGATION ANGOLA CRIS USM
DEL Argentina	AR	DEVCO G	*80994	CORREANI Pamela

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 - 2.2.6.5 List of empowerments made
-

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2. Accessing CRIS

2.1 Accessing CRIS

2.1.1 Start up Internet Explorer

Cris supports **Internet Explorer versions 4, 5, 6, 8 and 9**. Using other browsers may cause problems when reading certain screens.

2.1.2 On DEVCO's Intranet home page

2.1.2.1 Use CRIS

You can find DEVCO's Intranet website either from Intracomm or via other DG's websites. To access the CRIS application, click on the "CRIS" link in the DEVCO Tools list:



- DEVCO & Management >
- Staff Engagement
- EU Development Policy >
- Data & Reporting >
- Evaluation, Quality & Results >
- Knowledge Management & Learning >
- Countries & regions >
- Thematic Activities >
- Finance, Contracts & Legal >
- Human Resources >
- Delegations >
- Resources & Procedures >
- Communication >
- Sitemap

In the Spotlight



Participate in the Noble Prize competition and register for Clear Writing events

16/11/2016

To raise awareness of the Clear Writing Week (28/11 - 02/12), DGT is organising a Noble prize competition in English and French. It's a bureaucratic text to improve by 23/11.

Quick Links

DEVCO Tools

AUDIT module

BPC Forecasting

Capacity4Dev

CRIS

Dashboards

DEVCO APPLICATION Knowledge Base

DEVCO Companion

EAMR

EAMR-HQ

EuropeAid Atlas

EVAL module

PADOR

PRAG

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The following buttons will be available:

CRIS



CRIS

Common Relex Information System

Login

Access request

Documentation

Training

Support

Reporting

- **Login:** Click on this button to enter the application. By using this link, you access the "CRIS Accrual" production environment. The CRIS Accrual environment contains the real data. This is the environment which you use for the daily management of your files. It is from here that your transactions are sent to ABAC when you give visas which generate financial transactions (e.g. Financial Verifying Agent's visa).
- **Access request:** Click on this button in case you do not have permissions to access the application, and wish to request them to the DE VCO Application Support team.
- **Documentation:** Click on this button to have access to the various resources on CRIS, as well as other IT systems used in DEVCO (for details, please consult the [section below](#)).
- **Training:** Click on this button to register to classroom trainings on the CRIS application.
- **Support:** Click here if you require technical assistance for the system.
- **Reporting:** Click on this button to access reports (for details, please consult the [section below](#)).

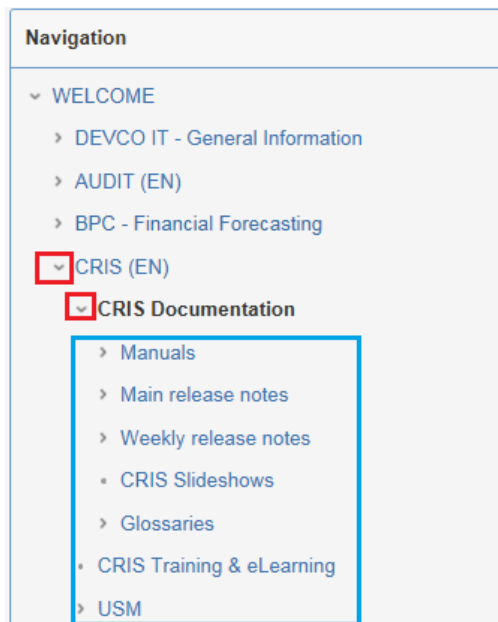
2.1.2.2 Reporting

Under this section, you can access the Data Warehouse Production environment which you can also access via CRIS directly using the "Data Warehouse" CRIS menu.

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2.1.2.3 Knowledge Base CRIS

The "Documentation" link opens the main page for CRIS learning resources on the internal Knowledge Base - user manuals, release notes, PowerPoint presentations, glossaries, etc. Click on the appropriate links to consult the files, or expand the hierarchy on the left to reach the document that you need:



You can also use the left-hand menu to find information other DEVCO IT applications:

- **AUDIT**
- **BPC - Financial Forecasting**
- **DEVCO Reporting Tools (BO Reports and Dashboards)**
- **EAMR (External Management Assistance Report) and EAMR-HQ (for Headquarters)**
- **eContent**
- **EVAL - Evaluation Module**
- **FSD - Financial Sanctions Database**
- **e-Calls PADOR**
- **e-Calls PROSPECT**
- **ROM - Results-Oriented Monitoring**

The wiki handles user documentation for all these applications, including full and step by step **manuals**, **release notes** (explaining new functionalities), **glossaries**, the **training offer**, **e-learning sessions** and **user support information**. The information is available in English and French.

2.1.2.4 CRIS: login

When you click on "CRIS" on the DEVCO Intranet page, the EU login page is displayed where you enter your e-mail address and password.

europaid requires you to authenticate

Sign in to continue

Use your e-mail address

Next

[Create an account](#)

Or

Or use the eID of your country



[Select your country](#)

Password

[Lost your password?](#)

Choose your verification method

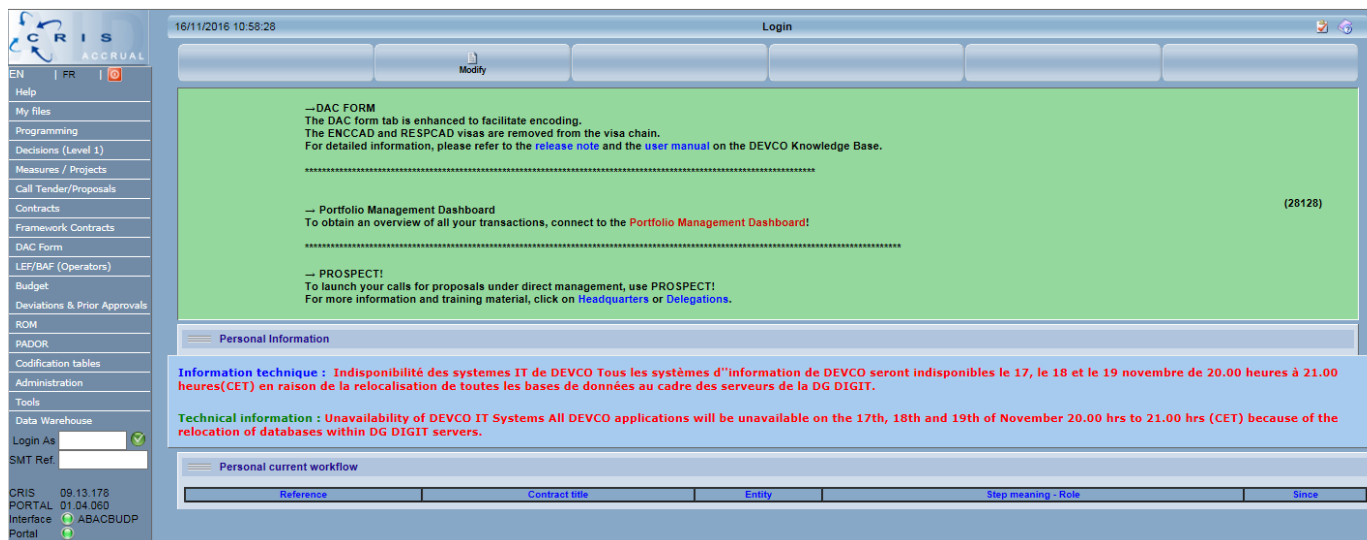
Password



Sign in

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Once you click on "Sign in", you will be directed on your login page in CRIS, where you will find **messages** drawing your attention to important news about CRIS and your Personal current workflow.



2.1.3 Who has access to CRIS?

- 1) Anyone working in the former Relex family DGs (NEAR, TRADE, ECHO, DEVCO, ELARG, FPI). The Commission service in charge of people access rights gives users in this category access. They do not therefore need to request a login.
- 2) People working in other DGs provided they get a specific access from DEVCO APPLICATION SUPPORT.

2.1.4 Special case: logins for other CRIS environments

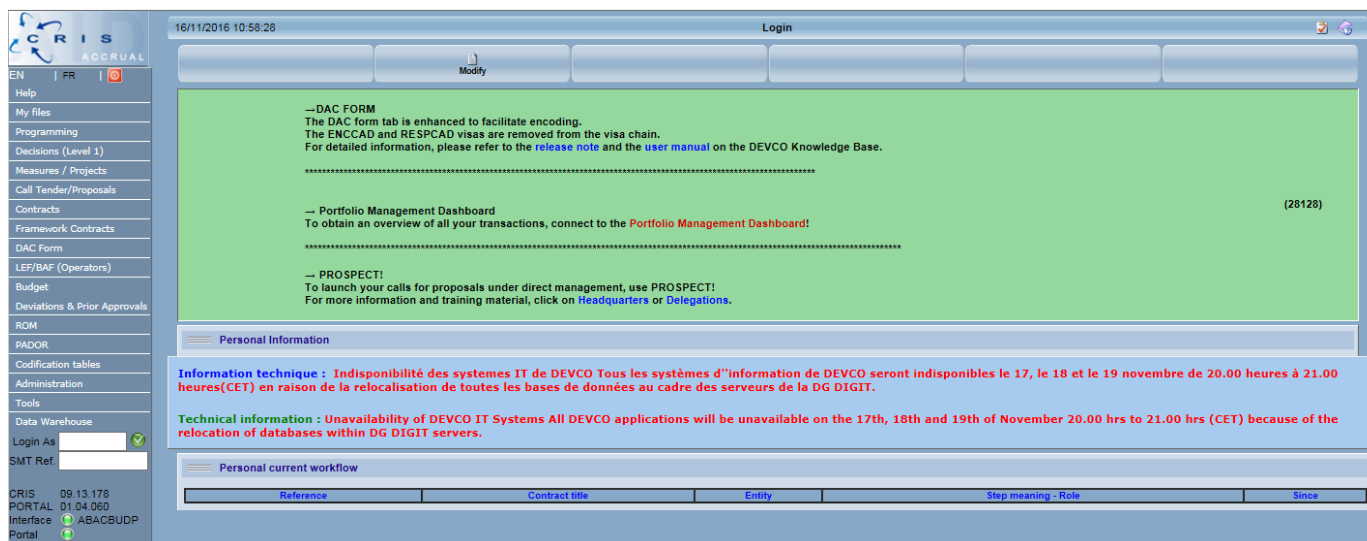
CRIS Training: it is highly recommended to login with 'X55B9xx' (xx = 01, 02, etc.) types of login as they have full permissions.
 top ^

2.2 Personal data

2.2.1 CRIS login page

Once you have entered your e-mail address and password, you access the CRIS login page. The right part of the screen is split into three parts:

- the top half of the screen shows your personal data
- the middle part containing the news and technical messages
- the bottom half of the screen contains your personal current workflow, with a hyperlink to the entity for which your visa is requested.



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2.2.2 Access to the user's personal data

There are two ways to access your personal data:

- click on the 'Modify' button in your login page or
- use the menu: Administration Security User: click on 'Search' (your username is filled in by default).

In either case you open the 'User: general information' screen:

Identification			
Login: MASAANA			
Information			
Name	MASALAGIU ANA	CRIS assignment	DEVCO R 06 - Information Technology
Address	J-54 03/024	Comref assignment	DEVCO.R.6 - Information Technology and Infrastructure
Fax		Tel	79779
Group		Email	Ana.MASALAGIU@ext.ec.europa.eu
Language	EN	Valid ?	<input checked="" type="checkbox"/>
Validity expiry date		Expert mode ?	<input type="checkbox"/>
Domain		Expanded menu ?	<input type="checkbox"/>
Colour profile	<input checked="" type="radio"/> Blue <input type="radio"/> Yellow	Last connection date	16/11/2016 10:58:27
Subscriptions to mailing lists: If you want to manage your subscriptions to the various mailing lists related to DEVCO Information Systems, please connect to the Mailing List Manager .			
Latest update			
Login		Date of update	10/11/2016 16:31:43
<input type="button" value="Submit"/>			

2.2.3 'User' screen, 'General Information' tab

You can see your personal data on this page.

General information			
Login: MASAANA			
Information			
Name	MASALAGIU ANA	CRIS assignment	DEVCO R 06 - Information Technology
Address	J-54 03/024	Comref assignment	DEVCO.R.6 - Information Technology and Infrastructure
Fax		Tel	79779
Group		Email	Ana.MASALAGIU@ext.ec.europa.eu
Language	EN - English	Valid ?	<input checked="" type="checkbox"/>
Validity expiry date		Expert mode ?	<input type="checkbox"/>
Domain		Expanded menu ?	<input type="checkbox"/>
Colour profile	<input checked="" type="radio"/> Blue <input type="radio"/> Yellow	Last connection date	16/11/2016 10:58:27
Subscriptions to mailing lists: If you want to manage your subscriptions to the various mailing lists related to DEVCO Information Systems, please connect to the Mailing List Manager .			
Latest update			
Login		Date of update	10/11/2016 16:31:43

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To update your data, click on the 'Modify' button. This gives you access to the different fields which can then be edited. Do not forget to click on "Submit" once you entered the modifications.

2.2.3.1 Fields which should NOT be modified

Data imported from the central personnel database (also used for the Commission directory) is updated each time a user logs on.

Note that changes will only actually be incorporated if they conform with the data in the personnel database. It serves no purpose therefore to update the fields concerning your unit, address, etc. in CRIS if this data is incorrect at central level.

If you change your details (address, phone number, etc.), the data is automatically updated.

2.2.3.2 Fields which can be modified by the Local Profile Manager (LPM)

- **Domain:** The LPM can set a default domain for a user. This domain will be the one which appears by default when you create a new Decision, Contract, Invoice, etc. The user can modify this field in the 'new' screens.
- **Valid?:** If this box is checked you are allowed to access CRIS. Users can be declared 'invalid' e.g. if they change jobs or have not connected to CRIS for more than 6 months. In this case, when they try to connect to CRIS again, they receive a message asking them to

contact their LPM. The LPM then has to check the 'Valid' box and, if necessary, redefine the user's permissions according to their new functions.

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2.2.3.3 Fields which can be modified by the user

- **Language:** :Click this link to modify your working language (English or French).
- **Colour profile** Blue/Yellow: allows you to choose the background of your CRIS screen.
- **Tel:** If you work in a Delegation, you can also enter your personal telephone extension rather than the delegation's main telephone number that appears by default.
- **Expert mode?** Do not tick this box.
- **Expanded Menu?** If you select this option, the CRIS menu at the left will be expanded, i.e.: it will display all the different sublevels of each menu.

2.2.3.4 Mailmass webservice

Mailmas webservice allows you to subscribe or unsubscribe to the different communication/newsletters concerning the DEVCO IT applications, sent by unit R4. These communications concerns subjects as the availability/non-availability of the information systems, releases, manual updates, timetables for the transactions closure, reporting on the different problems/bugs etc.

Click on the "Mailing List Manager" in of your CRIS profile:

General information		Permissions		Empowerment	
Refresh Modify New Signature Key search Advanced search					
Identification					
Login: MASAANA					
Information					
Name	MASALAGIU ANA	CRIS assignment	DEVCO R 06 - Information Technology		
Address	J-54 03/024	Comref assignment	DEVCO.R.6 - Information Technology and Infrastructure		
Fax		Tel	79779		
Group		Email	Ana.MASALAGIU@ext.ec.europa.eu		
Language	EN - English	Valid ?	<input checked="" type="checkbox"/>		
Validity expiry date		Expert mode ?	<input type="checkbox"/>		
Domain		Expanded menu ?	<input type="checkbox"/>		
Colour profile	<input checked="" type="radio"/> Blue <input type="radio"/> Yellow	Last connection date	16/11/2016 10:58:27		
Latest update					
Login		Date of update	10/11/2016 16:31:43		

Subscriptions to mailing lists:
If you want to manage your subscriptions to the various mailing lists related to DEVCO Information Systems, please connect to the [Mailing List Manager](#).

Each newsletter has a subscribing and unsubscribing button on the right hand side of it. When it is **green** , you have **subscribed** to that newsletter. When it is **gray**, you have **not subscribed** and will not receive any message from it. You can choose to unsubscribe or subscribe yourself.



Mailing Lists Manager for DEVCO Information Systems

The Mailing List Manager enables you to manage your subscriptions to the various mailing lists related to DEVCO Information Systems. Click on the "Yes"/"No" button to activate or deactivate your subscription.

Please note that you are automatically added to the communication mailing list of the applications you have been given permissions for. If you change job assignment, or no longer have the permissions for a certain application, you will automatically be removed from the mailing list.

AUDIT	<input type="radio"/> NO	I wish to receive communications concerning the AUDIT Module.
CRIS	<input type="radio"/> NO	I wish to receive communications concerning the Common External Relations Information System (CRIS), the system used for the planning and operational execution of the external actions of the European Commission.
EAMR-HQ	<input type="radio"/> NO	I wish to receive communications concerning the External Assistance Management Report of Headquarters.
EVAL	<input checked="" type="radio"/> YES	I wish to receive communications concerning EVAL, the system used for all project and programme evaluations by DG DEVCO and DG NEAR both in Headquarters and in Delegations.
FFO BPC	<input type="radio"/> NO	I wish to receive communications concerning BPC, the DEVCO Financial Forecasting System for Budget Planning and Consolidation.
PADOR	<input checked="" type="radio"/> YES	I wish to receive communications concerning PADOR, the online database in which potential applicants to calls for proposals register information about the legal and financial profile of their organisation (legal entity).

2.2.4 Choosing a signature

You need a signature for every visa that you give in CRIS. You are therefore advised to complete this field on first use.

2.2.4.1 Access to the signature screen

To access the signature screen: use the 'Administration Security User menu; click on 'Search'.

Then, click on the 'Signature' button.



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This opens the 'Signature' page.

05/01/2005 17:09:04 User

Key search Advanced search

Identification

Login BOSSCTH

Information

Name VANDEN BOSSCHE Thierry

Old signature

New signature

New signature 2

Submit

[top ^](#)

2.2.4.2 Choosing a signature

A signature consists of a **maximum of 6 characters**, including blanks. The CRIS signature is **case-sensitive**.
To enter your signature:

- open the 'Signature' page;
- enter your signature in the 'New signature' field;
- confirm your signature in the 'New signature 2' field-click on 'Submit'.

2.2.4.3 Changing signatures

To change your signature:

- open the 'Signature' page;
- enter your existing signature in the 'Old signature' field;
- enter your new signature in the 'New signature' field;
- confirm your new signature in the 'New signature 2' field;
- click on 'Submit'.
- [top ^](#)

2.2.4.4 What if you have forgotten your signature?

If you have forgotten your signature, please contact your LPM who can reset it for you via 'Reset signature'. You then follow the same procedure as for choosing your signature the first time ('New signature' and 'New signature 2' fields).

2.2.5 'User' screen, 'Permissions' tab

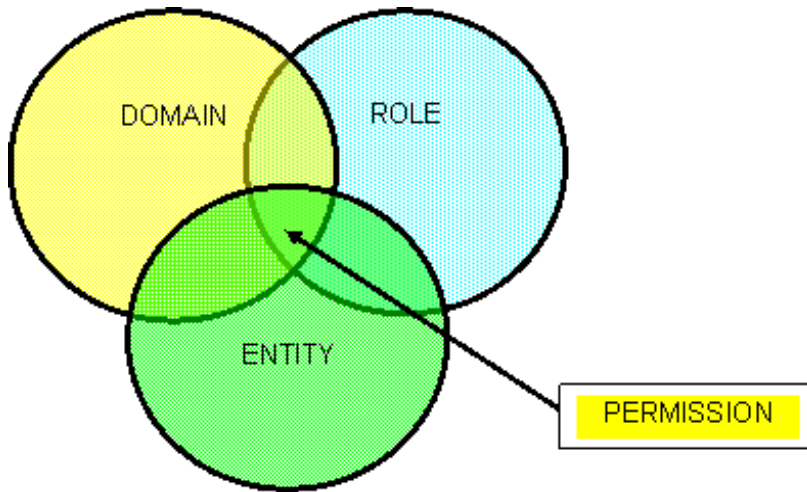
Only LPMs are allowed to modify a user's permissions. You are therefore not allowed to modify your own permissions.

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2.2.5.1 Permissions: domain, entity and role

Three elements define a permission: a domain, an entity and a role.

- Domain: work environment (geographical or thematic)
e.g.: ENPI, DCI-ALA, DCI-ASIE, DCI-SUCRE, ONG-PVD, etc.
- Entity: module or part of a CRIS module in which a user works
e.g.: Programming, Decision, measures/projects, Contract, Invoice, request for services, etc.
- Role: user's function
e.g.: data entry agent, operational or financial initiating agent, operational or Financial Verifying Agent, administrator, etc.
Permissions therefore apply to a **role** conferred for a particular **domain** and **entity**.



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2.2.5.2 Constraints

Each permission has constraints. These can be of different types:

- e.g. 1: Ceilings on certain amounts: a financial agent may make commitments or payments up to a maximum amount of x euros.
- e.g. 2: Restriction to a specific budget line only.
- e.g. 3: Restriction allowing a delegation user to work only on projects managed by his own delegation.

If you work at Headquarters, the value of the permission for the 'Lead delegation' constraint is 'TPS' (FR: 'tous pays'): all countries.

If you work in a delegation the constraint is 'Lead delegation' (DELG) and the value used for the associated permission is the delegation country code. The purpose of this constraint is to prevent a delegation from modifying data for a country outside its geographical zone.

Example of permissions in a user's profile:

Permissions				
Domain	Entity	Role	Constraint code	Constraint value
ASIE - Asia	AOF - Call for tender	ENCOD - Data Entry Agent	DELG - Delegation in charge	IN
ASIE - Asia	NCR - Note de crédit	GESTFIN - Financial Initiating Agent	DELG - Delegation in charge	IN
ASIE - Asia	DMP - Request for services	GESTFIN - Financial Initiating Agent	DELG - Delegation in charge	IN
ASIE - Asia	FAC - Invoice	GESTFIN - Financial Initiating Agent	DELG - Delegation in charge	IN
ASIE - Asia	FAC - Invoice	ENCOD - Data Entry Agent	DELG - Delegation in charge	IN

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2.2.5.3 The effect of permissions

Your permissions and any restrictions applied to them determine what changes you can make to an entity, e.g. a Decision.

Two other parameters should also be taken into account:

- Stage reached in the visa sequence

During the sequence, only the person responsible for the pending visa stage or a person having the same permissions or a person having received an empowerment can make changes to the entity.

Once the visa sequence is completed, some data is still available for editing: e.g. persons in charge. In the case of a Decision or a Contract, only GESTOPE is allowed to make these changes.

- The overall status of the entity

If an entity (e.g. a Decision) is ongoing (EC status, FR: 'en cours'), most data can only be modified through a rider. Once the entity is closed, it can no longer be changed.

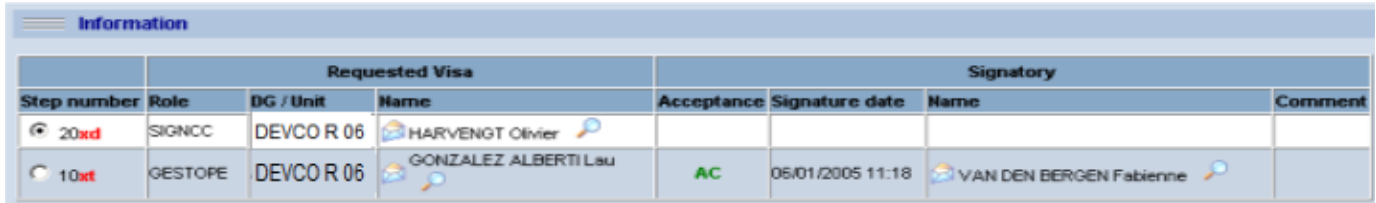
2.2.6 'User' screen, 'Empowerment' tab

If you are absent (mission, leave, etc.), you have to grant empowerment on your files to the person who actually carries out your duties, provided that this person has the same permissions as you. This person can then give CRIS visas on your behalf.

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2.2.6.1 Effects of the empowerment

The person who acts on your behalf will access the system with his/her own login, and give the visa on your behalf using his/her own signature. In the visa sequence screen, your name will appear in the left column (requested visa) and your colleague's name in the right column (signatory). In the following example, the visa on step number 10 was given with an empowerment.



Information							
Step number	Requested Visa			Signatory			
	Role	DG / Unit	Name	Acceptance	Signature date	Name	Comment
20	SIGNCC	DEVCO R 06	HARVENGT Olivier				
10	GESTOPE	DEVCO R 06	GONZALEZ ALBERTI Lau	AC	06/01/2005 11:18	VAN DEN BERGEN Fabienne	

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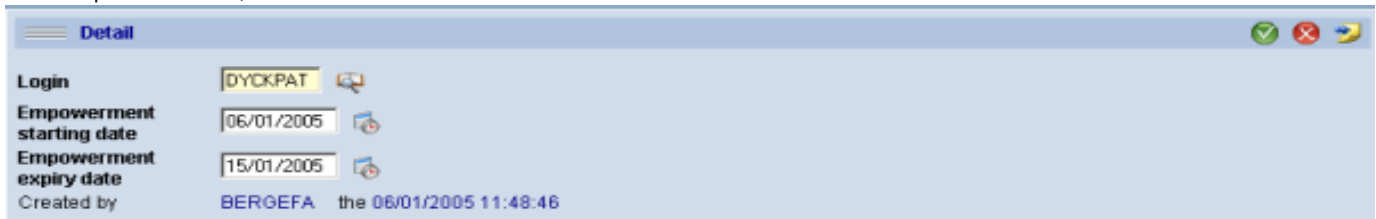
You have to grant an empowerment every time you are absent. However, **NEVER give your login and password{+}**: if you do so CRIS will register the visa as given by you, and not by another person on your behalf.

Your electronic signature has the same effect as a paper signature, so you will be responsible.

On this subject see Article 84 of Council Regulation (EC, Euratom) No 1605/2002 on the Financial Regulation applicable to the general budget of the European Communities: *'Where revenue and expenditure operations are managed by means of computer systems, documents may be signed by a computerised or electronic procedure.'*

2.2.6.2 How to grant an empowerment

In the 'Empowerment' tab, click on 'New'



Detail

Login: DYCKPAT

Empowerment starting date: 06/01/2005

Empowerment expiry date: 15/01/2005

Created by: BERGEFA the 06/01/2005 11:48:46

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Insert the login of the person you want to delegate your permissions to, the empowerment starting and expiry date, and click on 'Submit'.




The empowerment takes effect as from the 'starting date' at 0:00 AM (inclusive) and ends the day before the 'empowerment expiry date'.

Example: if empowerment starting date = 06/01/2005 (at 0:00 AM) and empowerment expiry date = 15/01/2005 (at 0:00 AM) the empowerment is no longer valid on 15/01/2005.

2.2.6.3 History of the empowerments given

The 'Empowerment' tab lists the various empowerments granted in the upper part of the screen.

The latest empowerment is shown first, followed by previous empowerments.

01/04/2014 16:15:39 User   

General information | Permissions | **Empowerment**

Identification

Login: CONSISI
Name: CONSIGLIO SIMONE

List of empowerments

	Login	Name	CRIS assignment	Empowerment starting date	Empowerment expiry date
<input checked="" type="radio"/>	BERGEFA	VAN DEN BERGEN FABIENNE	DEVCO R 06	01/04/2014	15/04/2014
<input type="radio"/>	TURIGGA	DI TURI GAETAN	DEVCO R 06	01/04/2014	15/04/2014
<input type="radio"/>	MUGENGE	MUGENZI GANYANA GEORGES	DELEG OUA	23/04/2007	23/04/2007

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2.2.6.4 Rules for the use of empowerments

- 1) A user may empower more than one person.
- 2) The person empowered has to have the same permissions as you have.
- 3) An empowerment is active provided that the starting date is earlier than or equal to today and the expiry date is later than today. The empowerment expires when it reaches its expiry date at 0:00 AM. It is not necessary to deactivate it.

4) **Creating an empowerment**

An empowerment can only be created for future dates.

An empowerment cannot have retroactive effect (starting date < today).

The starting and expiry dates must be different. To grant an empowerment for just one day, starting date = tomorrow and expiry date = day after tomorrow.

5) **Deleting an empowerment**

An empowerment can only be deleted if the period has not started yet (starting date > today).

6) **Modifying an empowerment**

An empowerment can only be modified in the following cases:

- modify the starting date or the user: only if the period has not started yet;
- modify the expiration date: only to extend it (today <= expiry date).

2.2.6.5 List of empowerments made

There is a list of empowerments given by you.

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Related pages

- [Chapter 1: Introduction](#)
- [Chapter 3: General page layout](#)
- [All chapters](#)

GNR - chapter 3



Version française de cette page



Chapter 3: General page layout

Content

- 3 General page layout
 - 3.1 Left part of the screen: logo, working languages, menus, sub-menus
 - 3.1.1 Logo
 - 3.1.2 Choice of working languages
 - 3.1.3 Menus / sub-menus
 - 3.1.4 Version and connection
 - 3.2 Right part of the screen: data
 - 3.2.1 Title of the entity
 - 3.2.2 Tabs
 - 3.2.3 Action buttons
 - 3.2.4 Data

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3 General page layout

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3.1 Left part of the screen: logo, working languages, menus, sub-menus

Other than the sub-menus, the left part of the screen does not change.

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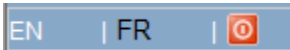
3.1.1 Logo

The top left corner of the screen shows the logo (1) indicating the environment you are working in:

- Production: CRIS Accrual
- Training: CRIS Training

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3.1.2 Choice of working languages



By clicking on the EN or FR buttons (2), you can choose in which language you want to use CRIS (English or French).

You can click on one of these buttons in the course of a session, since this action will not change the displayed page.

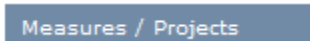
However, please note that only the language of the application changes, not the language of the data.

The red button allows you to logout of CRIS and return to the login screen.

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3.1.3 Menus / sub-menus

The left part of the screen contains the **menus** (3). These menus correspond to different entities in CRIS: Programming, Decisions (level 1), Measures / Projects, Contracts, Invoices, etc.



When you click on the title of the menu, the corresponding **sub-menus** are displayed. Each sub-menu corresponds to a page. By clicking on one of these sub-menus, you open the corresponding page on the right-hand side of the screen.

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3.1.4 Version and connection

In this section of the screen (4) you can find

- the current CRIS version (e.g.: 09.13.178),
- the version of the Portal,
- the ABAC environment to which this CRIS environment is linked and whether the connection is working and
- whether the connection to the Portal is available.

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3.2 Right part of the screen: data

The right part of the screen shows data. It will vary according to the menus and sub-menus selected.

3.2.1 Title of the entity

The title bar in the upper part of the screen (5) shows today's date and time and the name of the entity concerned: Decision, Contract, Invoice, etc.



The icons in the top right of the screen are used as follows:



If you found this entity through a search function, this icon allows you to return to the search results list.



This icon opens the list of entities to be signed.

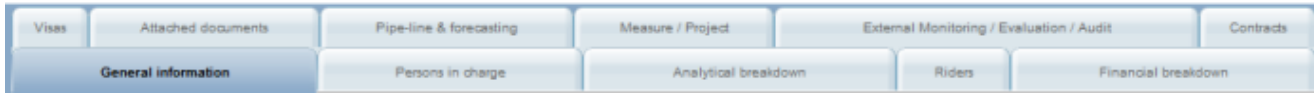


This icon opens the 'Help / General documents' menu containing the CRIS manuals, for example.

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3.2.2 Tabs

Beneath the title line is a bar containing a series of tabs (6): each of these tabs corresponds to a set of information about that entity.
e.g.: tabs for a Decision (level 1)



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3.2.3 Action buttons

The next line shows the action buttons (7) used for handling the information: creating a new entity, modifying an existing screen, searching for data...



Sometimes the action buttons are at the bottom of the screen, i.e. when there are several windows (e.g. list of persons in charge, visa sequence...)

This button bar can vary according to various factors:

- the entity concerned
- the status of the entity (visas already given)
- the user's permissions.

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3.2.4 Data

The lower part of the screen (8) contains the data selected.

In **certain cases** it can be spread over **several frames**. The action buttons then appear in the lower part of the screen.

E.g.:

List of Persons in Charge in the upper part of the screen, detail of the data concerning the selected person in charge in the lower part.

06/02/2014 13:41:23 Decision (Level 1)

[Visas](#)
[Attached documents](#)
[Pipe-line & forecasting](#)
[Measure / Project](#)
[External Monitoring / Evaluation / Audit](#)
[Contracts](#)

[General information](#)
[Persons in charge](#)
[Analytical breakdown](#)
[Riders](#)
[Financial breakdown](#)

Identification

Decision Number	DCI-ALA/2013/23439	Former system reference	
Title	Support to Food Security in Cuba, NIP 2011-2013. Sector I	Zone benefitting from the action	CU-Cuba
EU contribution	9,500,000.00 EUR	Total cost	9,500,000.00 EUR

Information

	Role	Login	CRIS assignment	Person in charge	Initiator
<input checked="" type="radio"/>	GESTOPE Operational Initiating Agent	GUALLAN	DELEG DO	GUALLARTE ANA - DEL / (Tel) *80165	<input checked="" type="radio"/>
<input type="radio"/>	ENCCAD Data Entry Agent for the DAC Form	GUALLAN	DELEG DO	GUALLARTE ANA - DEL / (Tel) *80165	<input type="radio"/>
<input type="radio"/>	ENCOD Data Entry Agent	GUALLAN	DELEG DO	GUALLARTE ANA - DEL / (Tel) *80165	<input type="radio"/>
<input type="radio"/>	GESTFIN Financial Initiating Agent	BANTIMA	DELEG DO	BANTI MATTEO - DEL / (Tel) *80091	<input type="radio"/>
<input type="radio"/>	RESPCAD Verifying Agent for the DAC form	RADELLU	DEVCO R 01	RADELET LUC - L-41 07/014 (Tel) 94627	<input type="radio"/>
<input type="radio"/>	RESPFIN Financial Verifying Agent	IZARRJO	DEVCO G 03	IZARRA AGUADO JOSE - J-54 05/022 (Tel) 92818	<input type="radio"/>
<input type="radio"/>	RESPOPE Operational Verifying Agent	CARREFR	DELEG DO	CARRERAS SEQUEROS FRANCISCO - DEL / (Tel) *80070	<input type="radio"/>

Detail

Role	GESTOPE - Operational Initiating Agent	CRIS assignment	DELEG DO - Delegation Dominican Republic
Login of the person in charge	GUALLAN - GUALLARTE ANA	Breakdown No	

Latest update

Login	MENADDA	Date of update	12/06/2013 14:58:32
-------	---------	----------------	---------------------

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Related pages

[Chapter 2: Accessing CRIS](#)

[Chapter 4: How to create or modify data](#)

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Chapter 4: How to create or modify data

Content

- 4 How to create or modify data
 - 4.1 Action buttons
 - 4.2 Types of fields
 - 4.2.1 Fields that cannot be modified

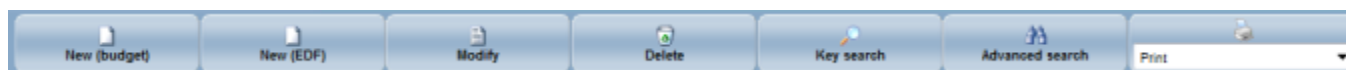
- 4.2.2 Fields to be checked
- 4.2.3 Fields with names in bold
- 4.2.4 White fields
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- 4.2.6 Help on field
- 4.2.7 Globe symbol
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 - 4.3.4 Browser icons: Back, Forward, Refresh, Home

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4 How to create or modify data

4.1 Action buttons

Depending on your permissions, you can use the following action buttons to handle data in the different information sets.



The **'New'** button is used to create a new entity. By clicking on this button in the 'General info' part of the entity, you create a new entity of the same type. If you click in the Detail part, you create a new line of detail.

The **'Modify'** button is used to modify an existing entity or item of information.

The **'Delete'** button is used to delete the entity or item of information concerned. You always have to confirm twice if you delete. You will not be able to delete an entity if it has already been visaed.

The **'Search'** buttons are used to find a specific entity on the basis of a reference (key) (search by key for a Decision / Contract... number), or according to other criteria that you define (Advanced search).

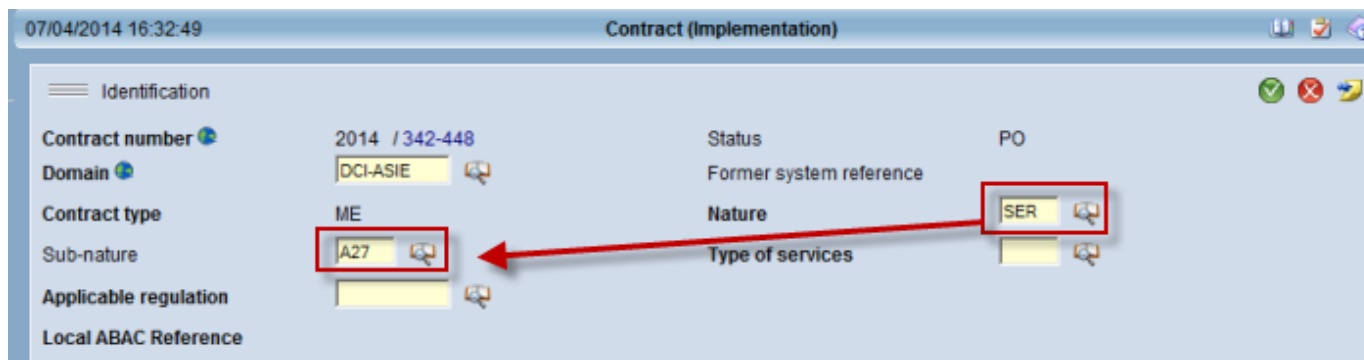
The **'Print'** button prints a pre-defined document or produces a list from which you choose which document to print.

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4.2 Types of fields

When creating new items of information or modifying existing items, you can access the relevant fields on the page concerned, with some exceptions.

Please note that the fields must be filled in horizontally, from the left part to the right part of the screen, from the top to the bottom. This is particularly important as the values CRIS proposes in certain fields depend on the values entered in the previous fields, like in the example below:



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4.2.1 Fields that cannot be modified

E.g.:

Decision No	2005 /
--------------------	--------

This reference is given automatically by the system and appears as read-only.

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4.2.2 Fields to be checked

Some fields may have to be checked.

E.g.:

Not co-financed	<input type="radio"/>
Parallel co-financing	<input type="radio"/>
Joint co-financing	<input checked="" type="radio"/>

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4.2.3 Fields with names in bold

If a field name is in bold, it means that the field is mandatory the first time data is entered. A page cannot be submitted until all the mandatory data is entered.

E.g.:

Total cost	1000000	EUR	
Commitment type	GF		

Note however that some fields may not be mandatory on first data input but may become so later for the purpose of giving visas.

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4.2.4 White fields

A white field means that there is no list of predefined values.

E.g.:

Title	free text
--------------	-----------

CRIS is not case-sensitive, i.e. you can use upper-case or lower-case letters in all fields - except the signature field - without affecting the validity of your input.

However please note that in certain cases you have to respect a given format.

E.g.: amounts:

no separators (no dots, no commas, no spaces)

dates:

dd/mm/yyyy: here you can use the calendar icon to select the date.


Date of presentation to the Committee	02/05/2005	
---------------------------------------	------------	--

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4.2.5 Yellow fields

Fields with a yellow background have lists of set values from which you have to select the appropriate one.

E.g.:

Procedure 

If you already know the code, you can enter it in the zone directly without using the selection list.

If you don't know the code, there are 3 ways to access the reference list:

- either double-click in the yellow field
- or click on the icon next to the field



The list of set values looks like this (this is the list of procedures for a Decision):

Click on the line to select it	
Code	Libellé
DL	Decision Delegation
DD	Decision Director (by Delegation)
PH	Empowerment procedure
PE	Written procedure

Select the line with the value that you want by clicking on it (either on the code or on the corresponding name).

If you click on the title of the column, the values will be sorted into order (first click = ascending order, second click = descending order).

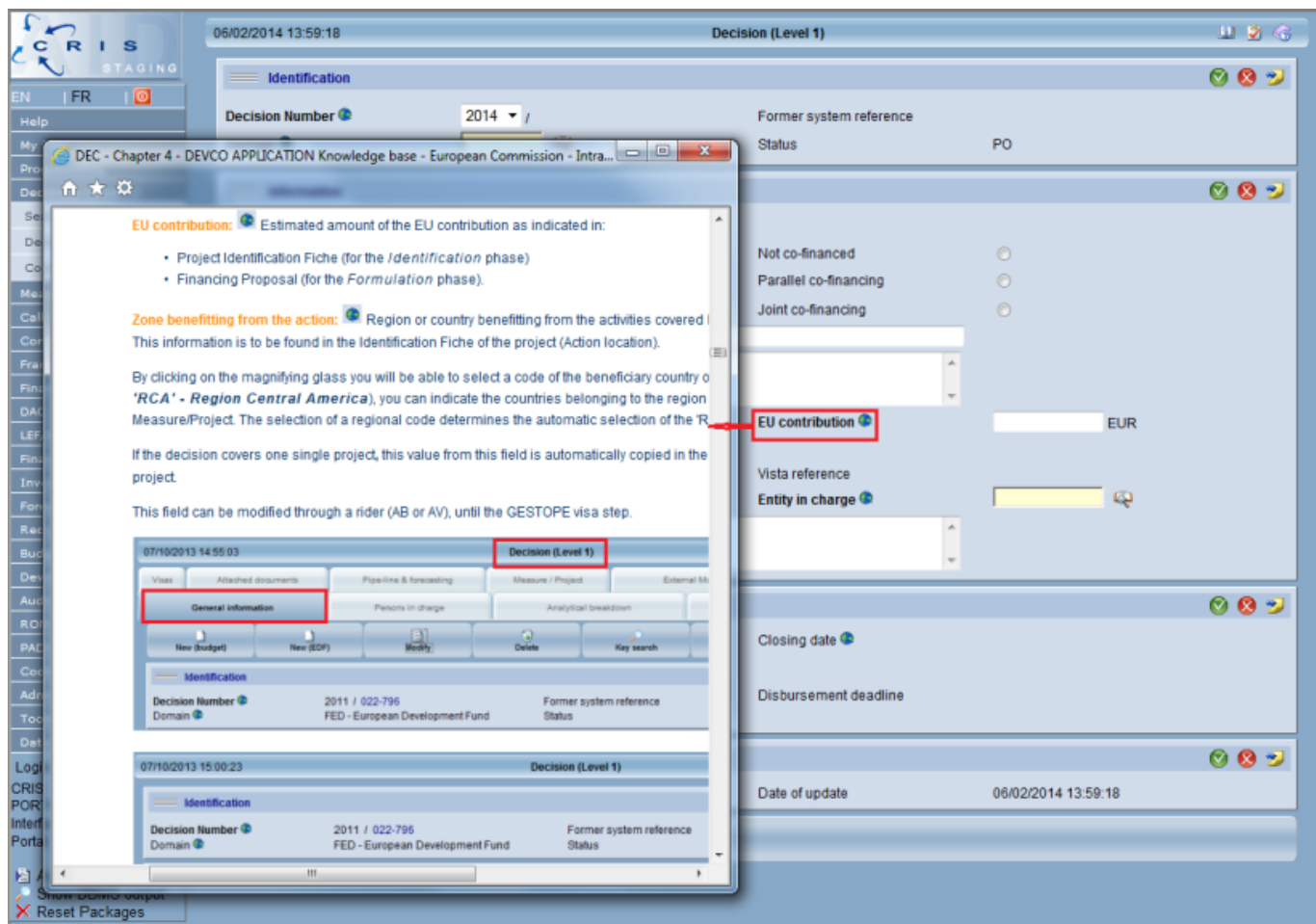
When the range of possible values is too large, an advanced search screen opens (see below: Advanced search).

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4.2.6 Help on field

To obtain more information on a certain field, you can click on the field name. You will be directed towards the explanation of the respective field in the **user manual of the CRIS module**.

For instance, when clicking on the field name **EU Contribution**, you are directed towards the explanation of the field in the Decisions Manual :



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4.2.7 Globe symbol

When you see the



symbol next to a field name (in the Decisions module), this means that the content of the field will be published on the Internet.

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4.2.8 Special case: selecting a budget line

There is a special feature in the **Budget line** field to help you identify the budget headings that you want.

If you haven't entered any search criteria before you double-click, you get the following message: 'No search criteria specified, search is too long'.

To avoid searches that are too long, you have to enter at least part of the budget line reference before you double-click in the yellow field.

Budget ref.

19.1002

You can also enter other values in the Budget ref. field to obtain a list of appropriate values. To be able to use a combination of search criteria, enter the percentage symbol (%) between the different criteria. This symbol serves as a 'wildcard', which replaces an unknown number of characters. Make sure you enter the search criteria in the order in which they appear in the budget line.

For instance, if you need to see all budget lines that start with 21.07 and have DEVCO as the fund centre, this is what you can enter to obtain a limited list of values:

Detail

Serial Nr 01

Budget line 21.07%DEVCO

To see all budget lines for the Delegation of Russia:

Budget line DELRUS

For the EDF, to see all 10th EDF lines to be used for Senegal:

Detail

Serial Nr 01

Budget line 10%LS

A window appears showing the appropriate budget line(s) to select from.

Click on the line to select it

Code	Libellé
FEDF-BFEDF-02.10.21.10.30-10-LS	AIDE HUM.URGEN.AIDCO
FEDF-BFEDF-02.10.21.20.30-10-LS	AIDE HUM.URGEN.ECHO
FEDF-BFEDF-02.10.21.10.60-10-LS	AUTRES CHOCS AVEC IM
FEDF-BFEDF-02.10.21.10.50-10-LS	COMPENSATION INSTABI
FEDF-BFEDF-02.10.10.01-10-LS	ENVELOPPE A # DOTATI
FEDF-BFEDF-02.10.10.01-10A-LS	ENVELOPPE A # DOTATI
FEDF-BFEDF-02.10.21.10.40-10-LS	INITIATIVES D'ALLÈGE



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4.3 Other important icons

4.3.1 Submit

Submit

To save the data you have just entered or any changes you make, click on the 'Submit' icon at the bottom of the screen or use the green icon (OK) in the blue bar.

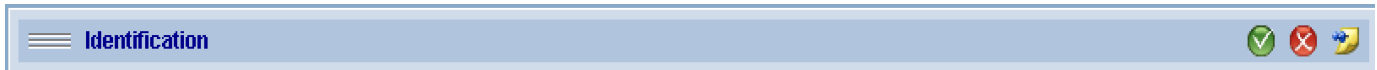
Identification   

At the bottom of each screen CRIS indicates the date of the last update and the login of the person who did it.

Latest update

Login MALMKAR Date 13/05/2003

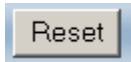
If you do not want to save the information you have entered, use the red icon (Cancel) in the bar:



The information is not saved and you return to the previous screen.

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4.3.2 Reset



This button at the bottom of the screen clears the zones you have just completed but not saved. It also resets the zones with set default values.

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4.3.3 Default values

If the values entered are those you usually work with, you can ask for them to be stored by clicking on the 'Save default values' icon.



If you use this function in the 'New' page of an entity, your standard preferences will automatically be inserted in the fields on this page every time you create a new entity of the same kind (e.g. new Decision, new Contract, etc.) or reset the page. Default values are specific to each kind of entity.

This function is particularly useful for saving default search criteria in the advanced search screens.

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4.3.4 Browser icons: Back, Forward, Refresh, Home

At the top of the screen you can see your normal browser functions.



The '**Back**' and '**Forward**' buttons allow you to go backwards and forwards through the pages of the application. However, you cannot use the **Back** button to update the previous screens to reflect the latest updates. You should therefore use this function only when consulting CRIS, not for inserting new data.

If you want to refresh, you can click on your **right-hand mouse button and select the 'Refresh' option.**

The '**Home**' button



takes you back to the page defined as the homepage of your Internet browser. You can check this via the Internet options of your browser. If you click on this, you will be ejected from the programme (except if CRIS is the default site specified in your internet options)!

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Related pages

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Chapter 5: Searches

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 - 5.1.2 Key search by CRIS reference
 - 5.1.3 Key search using the old system reference
 - 5.1.4 How to search by key
 - 5.1.5 Result of a key search
 - 5.2 Advanced search
 - 5.2.1 Opening the advanced search screen
 - 5.2.2 Layout of the advanced search screen
 - 5.2.2.1 Title bar (1)
 - 5.2.2.2 'New' button (2)
 - 5.2.2.3 Type of list and maximum number of records to be found (3)
 - 5.2.2.4 Default values (4)
 - 5.2.2.5 Search criteria (5)
 - 5.2.2.6 Search operators (6)
 - 5.2.2.7 Fields in which you enter the search criteria value (7)
 - 5.2.2.8 Contextual help button (8)
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 - 5.2.3 List containing the result of an Advanced search results list
 - 5.2.3.1 Sorting data using the column title
 - 5.2.3.2 Accessing data on a given entity
 - 5.2.3.3 New advanced search
 - 5.2.3.4 Export to Excel

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5. Searches

Before entering a new Decision, a new Contract, etc. in CRIS, you should check that this has not already been done by another user. You should also be able to find the data you have created afterwards.

There are two ways of searching:

- key search: on the basis of the reference number of the entity
- advanced search: on the basis of various criteria.

5.1. Key search

With a key search you can find an entity on the basis of its reference number (its key).

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5.1.1 Access to the key search screen

The 'key search' page is the page that you access when you select an entity via the corresponding sub-menu. For instance: Invoices, sub-menu Invoice

You can search:

-either on the basis of the CRIS reference key :

Invoice /

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-or - for data imported from a former information system - on the basis of its reference in the former system (OLAS, Désirée, MIS II, Gelibu):

Former reference

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5.1.2 Key search by CRIS reference

The reference number in CRIS is a **unique number** given automatically by CRIS when a new entity is created: Decision, Contract, Invoice, etc., whatever the Unit or Directorate in charge. There is no specific numbering by Directorate, by budget line, by domain, etc.

For better visibility, CRIS shows it with the year of creation and a dash between figures. *E.g.: 2009 / 001-234.*

However, when you carry out a key search, you should enter only the reference figures, without the year, the 0's preceding the figures or the dash, *e.g.: 1234*

There are exceptions:

-the numbering of Invoices, Credit Notes, Forecasts of Revenue and Recovery Orders starts from zero again each year: the key search is therefore based on the year **and** the Invoice number:*e.g.: year 2004 / Invoice number 370*

-there may be several versions of the framework Contract request for services: the key search is therefore based on the request number and version number:*e.g.: number of request for services: 34567 / version: 2*

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5.1.3 Key search using the old system reference

You can also look for an entity using its reference number under a former system. In that case you should enter the **full** reference in the field before clicking on 'Search'.

E.g.: searching for a Decision on the basis of a former MIS number:

Former system reference

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E.g.: searching for a Decision on the basis of a former Désirée number:

Former system reference

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E.g.: searching for a grant Contract on the basis of a former Gelibu number:

Former system reference

top ^

E.g.: searching for a contract based on the OLAS number:

Former system reference

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5.1.4 How to search by key

Enter the reference number in the key field (e.g. Decision number, old system reference, etc.), and

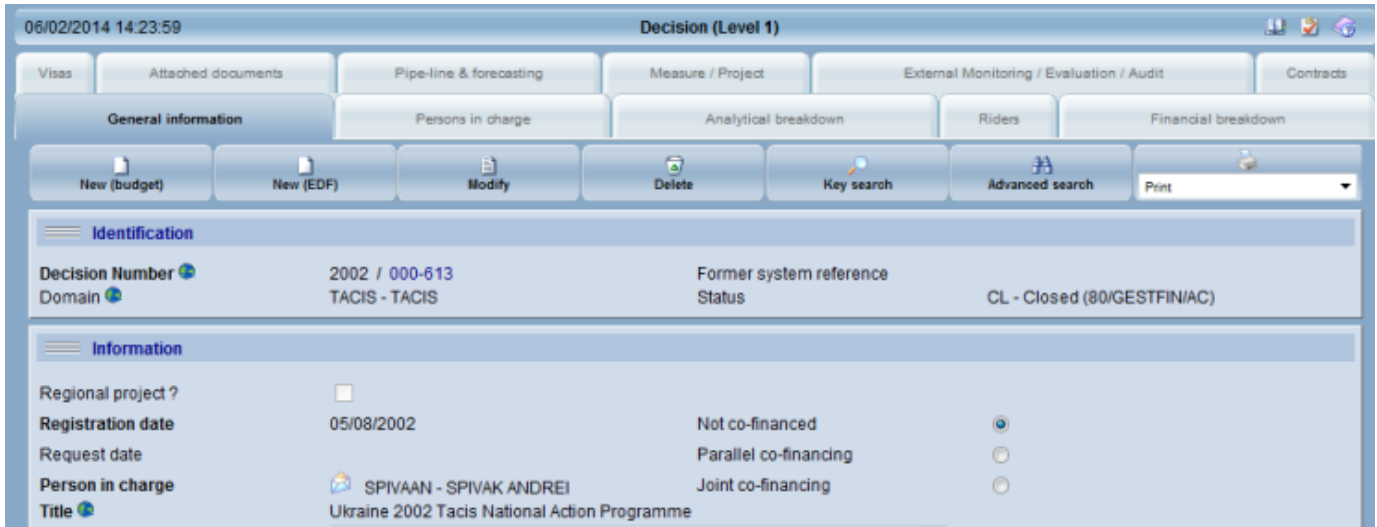
click on 'Search' at the bottom of the screen- or click on the green icon (OK) in the blue bar- or press 'Enter'.



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5.1.5 Result of a key search

The screen of the requested entity opens directly. In the above example the general information for Decision 613 appears.



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5.2. Advanced search

Searching by key assumes that you know the reference key for the entity concerned. If you do not know this key you can carry out an advanced search using various criteria.

This function allows you to refine your search.

5.2.1 Opening the advanced search screen

There are two ways of opening the advanced search screen:

-Either click on a menu and corresponding sub-menu (e.g.: 'Decision (Level 1)' menu, 'Decision (Level 1)' sub-menu), then click on the 'Advanced search' action button,



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-Or click on a menu and choose the 'Search' sub-menu (e.g.: 'Decision (Level 1)' menu, 'Search' sub-menu).

You may also go to the advanced search screen when you double-click in a yellow field with a very large table of values.

5.2.2 Layout of the advanced search screen

The screen is divided into several parts:

The screenshot shows a web application interface for searching 'Decision (Level 1)'. The interface is divided into several numbered sections:

- 1**: Title bar showing the date and time (10/01/2005 17:13:56) and the entity name 'Decision (Level 1)'. There are also icons for help, search, and refresh.
- 2**: A 'New' button.
- 3**: 'Type of list' section with a dropdown menu set to 'List of decisions (Level 1)' and a text input for 'Maximum number of records to be found' set to '100'. There are also icons for help, search, and refresh.
- 4**: 'Search criteria' section with a list of fields: Decision No (dropdown with '6'), Former system reference, Domain, Decision year, Status, DG / Unit, Person in charge, Geographical Zone, Contracts final due date, and Payments final due date. There are also icons for help, search, and refresh.
- 5**: 'Geographical Zone' dropdown and 'Submit' button at the bottom.

5.2.2.1 Title bar (1)

The title bar shows you whether you are searching for the right entity (e.g.: Decision, Contract, operators...).

5.2.2.2 'New' button (2)

This action button creates a new entity (here, a new Decision).

5.2.2.3 Type of list and maximum number of records to be found (3)

The type of list also confirms the type of entity you are searching for.

In some cases it allows you to look for a different list (e.g. in the Contract search screen you can look for the Legal Entities and Bank Accounts of the contracts).

To make the search faster the maximum number of records to be found is limited to **100 by default**.

However you can increase this number to **a maximum of 999**. If there are more than 999 records you have to refine your search criteria.

5.2.2.4 Default values (4)



If you regularly make the same advanced searches, you can **store your search criteria** in CRIS: enter the criteria in the fields and click on the 'Save default values' icon before running the search.

A new window opens up containing the following message: 'Your parameters have been saved'.

Go back to the advanced search screen where you can click on 'Submit' to run the search. The next time you carry out a search, your preferences will automatically be inserted in the fields on this page. Preferences are specific to each entity.

To **delete the default values**, open the search screen, delete the values and save the empty fields as default values.

5.2.2.5 Search criteria (5)

The list of criteria varies from one entity to another. The criteria used to find a Decision are not the same as those used to find a Contract, a Request for Services or an Invoice.

5.2.2.6 Search operators (6)

You can limit your search by using the following logical operators:

Logical operator	Meaning	Features	Example of search
=	Equal to	applies to alphanumeric data and dates	<i>Framework Contract ref.= AMS/451 This will give you the list of requests for services under framework Contract AMS/451.</i>
<>	Different from	applies to alphanumeric data and dates	<i>Login <> BERGEFA This will find requests for services entered by users other than BERGEFA.</i>
>	Strictly greater than	applies to alphanumeric data and dates	<i>Date of request > 01/01/2004 Lists requests for services entered after 01/01/2004 but not on 01/01/2004.</i>
> =	Greater than or equal to	applies to alphanumeric data and dates	<i>Date of request >= 31/03/2004 Lists requests for services entered after 31/03/2004, including those entered on 31/03/2004.</i>
<	Strictly less than	applies to alphanumeric data and dates	<i>Date of request < 01/01/2004 Lists requests for services entered before 01/01/2004 but not on 01/01/2004.</i>
< =	Less than or equal to	applies to alphanumeric data and dates	<i>Date of request <= 01/01/2004 Lists requests for services entered before 01/01/2004, including those entered on 01/01/2004.</i>
BETWEEN	Included between	applies to numbers and dates The two limit dates of the search interval must be separated by a comma.	<i>Date of request BETWEEN 01/01/2001,01/06/2001 The result of this search is the list of requests for services entered between 01/01/2001 and 01/06/2001 inclusive.</i>
NOT BETWEEN	Selects entries not included between	applies to numbers and dates The two limit dates of the search interval must be separated by a comma.	<i>Date of request NOT BETWEEN 01/03/2001,01/04/2001 The result of this search is the list of requests for services other than those entered between 01/03/2001 and 01/04/2001 inclusive.</i>
BEGINNING WITH	Begins with	The field begins with the specified characters. You do not need to use the % character.	<i>Zone benefitting from the actionBEGINNING WITH B Lists entities for all countries or regions starting with the letter B: Bolivia, Brazil, etc.</i>
CONTAINING	Contains	The field contains the specified characters. You do not need to enter the % character before or after.	<i>Zone benefitting from the actionCONTAINING B Lists entities for all countries or regions containing the letter B: Bolivia, Brazil, Lebanon, etc.</i>
NOT CONTAINING	Does not contain	The field does not contain the specified characters.	<i>Zone benefitting from the action NOT CONTAINING B Lists entities for all countries or regions not containing the letter B: South Africa, Argentina, etc.</i>
IS NULL	Does not exist	There is no value for the specified field in the database. Beware: 1 space = 1 character!	<i>Delegation in Charge IS NULL. Lists entities that are managed at Headquarters.</i>

IS NOT NULL	Exists	A value exists in the database for the specified field. Beware: 1 space = 1 character!	<i>Delegation in Charge IS NOT NULL Lists entities in which a Delegation in Charge is mentioned.</i>
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5.2.2.7 Fields in which you enter the search criteria value (7)

You enter your search criteria in the white fields.

Text fields are not case sensitive. **Dates** have to be entered in the format dd/mm/yyyy (e.g.: 01/02/2005). **Amounts** should be entered without separators (commas, dots, spaces).

You should use **codes** from the reference table for certain criteria instead of the full name (e.g.: geographical area: TN, not Tunisia). If you don't know the codes, use the contextual help button (see below).

Unlike data entry, where you enter only one value per field, you can enter **several values** as search criteria, provided you separate them with a **comma**.

5.2.2.8 Contextual help button (8)

If you don't know the codes for a specific criterion, click on the white field: a contextual help button with the name of the selected criterion will appear to the bottom left of the screen. Clicking on this help button opens the reference list of codes and names for the criterion selected.

You can also use the search icons to the right of the field:



to access the list of codes.

Use the



icon to access the calendar.

5.2.2.9 Submit (8)

Clicking on 'Submit' runs the search.

5.2.3 List containing the result of an Advanced search results list

E.g.: search for on-going Contracts signed in 2013

The list of results is then displayed.

The screenshot shows a search results page with the following elements:

- 1**: A red bar at the top of the results area indicating that the selection returns more than 10 records.
- 2**: The search results table with columns: Contract number / Contract title, Contractor's signature date, End date of activities, CPA Date, Contracting party, Amount, Paid, Balance, and Person in charge.
- 3**: A red box highlighting the second row of the table.
- 4**: A red box highlighting the 'Advanced search' button in the top right corner.
- 5**: A red box highlighting the 'Export to Excel' button in the top right corner.

Contract number / Contract title	Contractor's signature date	End date of activities	CPA Date	Contracting party	Amount	Paid	Balance	Person in charge
DCI-ASIE/2013/308-778 (EC) Preparatory Works for the next rounds of the National Risk and Vulnerability Assessment	14/02/2013	15/04/2014		AIDE A LA DECISION ECONOMIQUE SA	EUR 199,999.00	111,008.40	88,990.60	FARHODI WALI MOHAMMED
DCI-ASIE/2013/318-345 (EC) Support to the state actors in the education sector	08/07/2013	04/01/2014		AGRICONSULTING EUROPE SA	EUR 183,675.00	110,205.00	73,470.00	BOTOBAEVA GULNARA
DCI-NSAPVD/2013/311-297 (EC) "Viña del Mar Segura: Desarrollo del territorio con enfoque de gestión del riesgo"	25/07/2013	25/07/2016		MUNICIPALIDAD DE VINA DEL MAR	EUR 285,000.00	87,965.00	197,035.00	SUAREZ SOLEDAD

A **red bar** at the top of the screen (**1**) tells you if the number of hits exceeds the maximum number of entries that you indicated. You can go back to the advanced search screen and adapt the maximum number of records to be found accordingly.

A **green bar** tells you the exact number of entries that were found corresponding to your search criteria if it is less than the maximum specified.

Several functions are available from the result list:

5.2.3.1 Sorting data using the column title

If the column title is blue (2), you can sort the result list according to that criterion just by clicking on it. Depending on the type of data, the column will be sorted into ascending or descending, chronological or alphabetical order. Click on the column title again to sort the data in the reverse order.

Note:

If your result list contains more than the specified number of hits (e.g. 100), the whole list of entries corresponding to your search criteria will be sorted, not just the selection displayed.

5.2.3.2 Accessing data on a given entity

To select the value that interests you and see the detail, click on the hyperlink (3) referring to it. CRIS opens the general information page of the entity.

5.2.3.3 New advanced search

The 'advanced search' button (4) opens the screen for a new search.

5.2.3.4 Export to Excel

The 'Export to Excel' button (5) exports the results of your search to Excel.

Excel allows you to sort in several different ways, produce totals, present your data in a specific order, etc.

Please note that the table exported to Excel may contain a lot more information than shown in the CRIS result list.

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[Chapter 6: Tabs](#)

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Chapter 6: Tabs

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 - 6.3.4.2 Temporary visa
 - 6.3.4.3 Definitive visa
 - 6.3.4.4 Automatic visa
 - 6.3.5 Visa values: acceptance codes AC, CC, RV, SP, VL, SO, OH
 - 6.3.5.1 AC - Accepted
 - 6.3.5.2 CC - Refused
 - 6.3.5.3 RV - Sent back
 - 6.3.5.4 SP - Suspended
 - 6.3.5.5 VL - Validation
 - 6.3.5.6 SO - Send for Overrule
 - 6.3.6 How to issue a visa
 - 6.3.7 Effect of issuing visas
 - 6.3.8 List of visas required
 - 6.3.8.1 Personal current workflow
 - 6.3.8.2 'My files' / 'My workflow' menu
 - 6.3.8.3 'Tools' / 'To be signed' menu
 - 6.3.9 Global visa
 - 6.3.10 Empowerment
 - 6.3.10.1 Mission - Holiday
 - 6.3.10.2 Leaving the Delegation or the Unit
- 6.4 Analytical breakdown
 - 6.4.1 Introduction: types of breakdown
 - 6.4.2 Go to the 'Analytical breakdown' tab
 - 6.4.3 Layout of the 'Analytical Breakdown' tab
 - 6.4.4 Show some or all of the analytical items
 - 6.4.4.1 Collapse all levels
 - 6.4.4.2 Show sub-levels of a collapsed item
 - 6.4.4.3 Show all levels
 - 6.4.5 Analytical breakdown templates
 - 6.4.6 Modify an existing item
 - 6.4.7 Add a new item
 - 6.4.7.1 New level or new sub-level?
 - 6.4.7.2 Information needed to create a new (sub)level
 - 6.4.8 Analytical items: allocable / non allocable
 - 6.4.8.1 What does 'allocable' mean
 - 6.4.8.2 How can you indicate that an item is allocable
 - 6.4.8.3 Special case: items subdivided into sub-levels
 - 6.4.8.4 N.B.
 - 6.4.9 Checking that the Analytical Breakdown is correct
 - 6.4.9.1 Check the amounts of the Analytical Breakdown against those entered in the General Information tab
 - 6.4.9.2 Total cost = EU contribution * Other Contributions
 - 6.4.9.3 Total of allocable amounts = total of EU contribution
- 6.5 Financial breakdown
 - 6.5.1 Go to the 'Financial breakdown' tab
 - 6.5.2 Layout of the 'Financial breakdown' tab
 - 6.5.2.1 Financial breakdown for a Decision (level 1)
 - 6.5.2.2 Financial breakdown of a Contract
 - 6.5.3 Filling in the Financial Breakdown
 - 6.5.4 Adding a new line in the Financial Breakdown
 - 6.5.5 Modifying an existing line in the Financial Breakdown
 - 6.5.6 Financial Breakdown before the Financial Verifying Agent's visa
 - 6.5.7 Financial Breakdown after the Financial Verifying Agent's visa
- 6.6 Statistical breakdown
 - 6.6.1 Go to the 'Statistical Breakdown'
 - 6.6.2 *Layout of the 'Statistical Breakdown' page*
 - 6.6.3 Selecting the sector code(s)

- 6.6.3.1 Background and support
- 6.6.3.2 Sector profiling for Measures/Projects
- 6.6.3.3 DAC sector code for a Contract
- 6.7 Description
- 6.8 Riders
- 6.9 Attached documents
- 6.10 Relation between different entities

6. Tabs

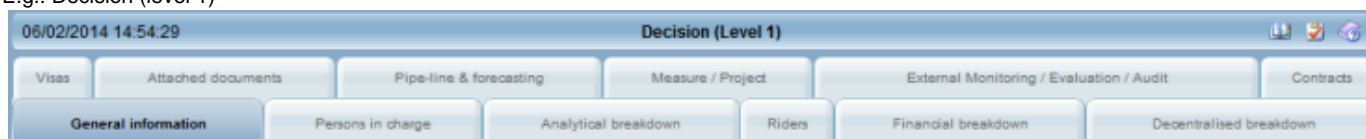
Each entity is broken down into a number of information sets or tabs to make the information more accessible. Clicking on one of the tabs opens the page with the requested information.

The information sets available can vary from one entity to another.

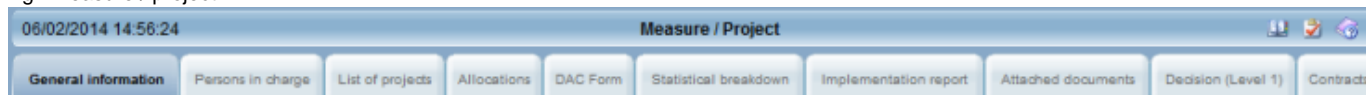
E.g.: Programming



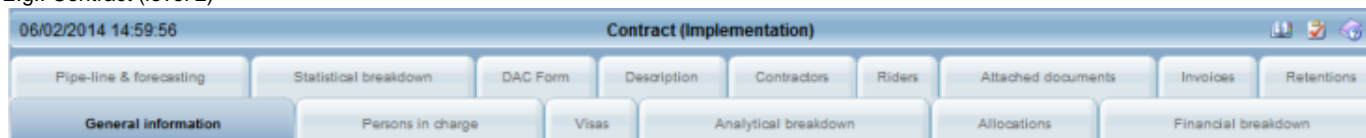
E.g.: Decision (level 1)



E.g.: Measure / project



E.g.: Contract (level 2)



However, please note that some elements are the same from one entity to the other (e.g.: General Information, Persons in Charge, Visas, etc.). Here we describe the most common elements.

Specific aspects are dealt with in the individual module manuals.

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6.1. General information

As its name suggests, this set contains general information on the specified entity.

On this page you also find information such as title, CRIS reference, former system reference, status of the entity, name of the person in charge, amounts, dates, etc. This information is structured as follows.

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6.1.1. Identification

The data shown in the Identification zone appears in each information tab.
Examples:

- Decision (level 1)

Identification			
Decision No	1998 / 003-244	Former system reference	CHD/1998/2200
Domain	ASIE - Asia	Status	EC - Ongoing (80/GESTFIN/AC)

- Contract

Identification			
Contract number	2010 / 238-644	Status	EC - Ongoing (96/GESTITF/AC)
Domain	FED - European Development Fund	Former system reference	
Contract type	SV - Grant	Nature	ACT - Action Grants
Sub-nature	D05 - Grant to an International Organisation (direct centralised and decentralised management) – multi-donors		
Applicable regulation	FRFEDF - European Development Fund		
Local ABAC Reference	AID 238644		

The Identification zone usually contains:

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6.1.1.1 CRIS reference

The CRIS reference key is a unique number assigned automatically by CRIS whenever you create a new entity: Decision, Contract, etc. whatever your unit or Directorate. There is no specific key for a Directorate, budget line or domain; Contract keys are not linked to the Decisions on which they depend.
(For further information see the chapter 'Key search' above).

6.1.1.2. Former system reference

This field contains the key that the entity had in the former system from which it was imported. (For further information see the chapter 'Key search' above).

6.1.1.3 Domain

The domain is your work environment (geographical or thematic),

e.g.:DCI-ASIE, ENPI, ONG-PVD, DCI-ALA, FED, etc.

When entities are linked, the domains must be consistent:

e.g.: You cannot link a DCI-ASIE contract to an ENPI decision.

6.1.1.4. Status of the entity

Status	EC - Ongoing (80/GESTFIN/AC)
---------------	------------------------------

The status of the entity varies as and when visas are given. It is indicated as a code referring to the associated visa level.

- Codes:
 - PO: provisional:** entity awaiting a visa in CRIS
 - DE: decided:** depending on the type or record (Decision, Contract) this status as a different meaning
 - EG: committed:** entity for which the accounting transaction has received all the necessary visas in ABAC.
 - EC: ongoing:** entity for which all visas have been given (possibly following the entry of the financing agreement / Contract signature dates in CRIS)
 - CA: cancelled:** entity cancelled following a refusal visa (CC) or a cancellation rider
 - CL: closed:** Decision or Contract closed following a closure rider.
 - Associated visa level:
 - indicates the latest visa given for this entity:
 - number of the level of the latest visa given
 - role of the person who gave the latest visa
 - type of visa given
- e.g.: 80/GESTFIN/AC: the latest visa was given by the financial initiating agent at level 80 and he/she gave an acceptance visa.*

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6.1.2. Information

Example of the information zone of a Decision:

Information	
Decision Number	021-344
Registration date	22/04/2010
Delegation in charge	LR - Liberia
Confidential contract	No
Contract title	Support to the Liberia Reconstruction Trust Fund
Description	Contribution to IDA-managed TF to support the reconstruction of vital infrastructure. THE focus is on two road corridors from Monrovia Airport (Cotton Tree) to Buchanan and Monrovia (Red Light) to
Comment	
Commitment type	RF - Individual legal commitment implementing a FA on a GF
Block grant ?	<input type="checkbox"/>
Procurement reference	
Person in charge	KIRCHGI - KIRCHMAYR GIORGIO
Entity in charge	DEVCO E
Zone benefitting from the action	LR - Liberia
Reference Central Archives	

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6.1.2.1. Link to the upper level entity

Decision No	003-244 - CHD/1998/2200
-------------	-------------------------

In each entity, the general information shows - where applicable - the link to the upper entity on which it depends.
 For the Measure / Project: link to the Decision
 For the Contract: link to the Decision.

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6.1.2.2. Name of the person in charge

Person in charge	 UHLPETR - UHL Petra
------------------	---

The login and name of the person in charge are shown.
 For a Decision or Contract, it is the operational initiating agent's login that is shown.
 Clicking on the little envelope next to the name



opens an Outlook message addressed to this person, containing the reference of the entity in question in the subject line.


6.1.2.3. Amounts

Total cost	15,480,000.00 EUR	EU contribution	15,100,000.00 EUR
-------------------	--------------------------	------------------------	--------------------------

In each entity, the general information shows the amounts for the entity.

These amounts are entered without separators (e.g.: 15480000) but CRIS shows the separators on the screen (e.g.: 15,480,000.00) once you have clicked on 'Submit'.

6.1.2.4. Zone benefitting from the action

Zone benefitting from the action  CAI - Asia

The 'Zone benefitting from the action' field shows the code and name of the geographical area (country or region) in question.

In some cases this field can no longer be edited in the general information tab even if the visas have not yet been given: in this case, you can edit the information in the 'Statistical breakdown' tab (for a Decision, under 'Measure / Project'), under 'Zone benefitting from the action'.

6.1.2.5. Commitment type

For Decisions and Contracts you have to specify the type of commitment to be generated in ABAC for the entity in question. A reminder of the existing commitment types can be found at the end of this manual.

The different entities are checked for consistency,

e.g.: When you create a new Contract, CRIS verifies that the type of commitment you have chosen corresponds to the type of commitment used for the linked Decision.

6.1.2.6. Title

Together with the Identification data, the entity's title appears in each information tab.

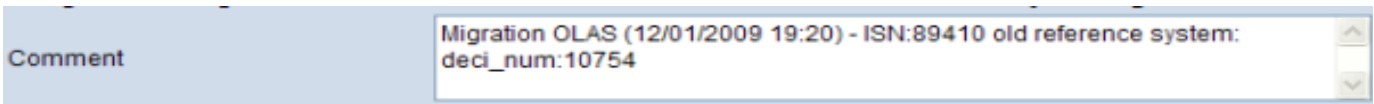
6.1.2.7. Description

The 'Description' field of the 'General information' tab is not meant for a long description. If you need a long description, you can add it in the 'Description' tab or attach a descriptive document in the 'Attached document' tab.

Inserting too long a text in the 'Description' field can cause problems when submitting the page or giving visas.

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6.1.2.8. Comments



The 'Comment' field can be used to give information on the entity in question. This field can still be edited even when all the visas have been given.

If the entity has been taken over into CRIS from an earlier system, this is indicated in the comments field, e.g.: Migration OLAS (12/01/2009 19:20) - ISN:89410 old reference system: deci_num:10754

6.1.3. Follow-up

Follow-up									
Starting date				Closing date 					
End date of Operational Implementation period (EOI)		30/04/2013							
Contracting deadline		Disbursement/Execution deadline							
Commitment	Type	Presentation Committee	Decision	FDC FA	FDC ILC	FDI	FDI FA	Sign. CE	Signature Benef. country
SCR.DEC.019336.01	GN	06/03/2008	25/04/2008		31/12/2009				

The 'Follow-up' zone is mainly to allow follow-up of the entity in question: signature dates, Final Date of the Financing Agreement, etc. A check is carried out to ensure that the dates of the Decision and of the Contracts linked to it are consistent (e.g. final date for Contracting, signature date, etc).

6.1.4. Last update

Latest update			
Login	HISTOMIS	Date	20/12/2002

The bottom part of the screen always indicates the login of the person who made the last update and when it was done.
 Migration : Some updates are the result of the entity being taken from an earlier system into CRIS. In this case the login at the bottom of the screen is the functional migration login.
 e.g. login HISTOMIS: entity imported from MIS Illogin H-Tacis: entity imported from Désiréelogin INTERFAC: entity imported from OLAS

6.2. Person(s) in charge

6.2.1. Access to the 'Persons in charge' tab

The list of persons in charge is displayed using this button



06/02/2014 15:16:09 **Decision (Level 1)**

Visas Attached documents Pipe-line & forecasting Measure / Project External Monitoring / Evaluation / Audit Contracts

General information **Persons in charge** Analytical breakdown Riders Financial breakdown

Identification

Decision Number FED/2009/21344 Former system reference
 Title Support to the Liberia Reconstruction Trust Fund (LRTF) Zone benefiting from the action LR-Liberia
 EU contribution 60,200,000.00 EUR Total cost 60,200,000.00 EUR

Information

	Role	Login	CRIS assignment	Person in charge	Initiator
<input checked="" type="radio"/>	GESTOPE Operational Initiating Agent	KIRCHGI	DELEG LR	KIRCHMAYR GIORGIO - DEL / (Tel)	<input checked="" type="radio"/>
<input type="radio"/>	ENCCAD Data Entry Agent for the DAC Form	KIRCHGI	DELEG LR	KIRCHMAYR GIORGIO - DEL / (Tel)	<input type="radio"/>
<input type="radio"/>	ENCOD Data Entry Agent	KIRCHGI	DELEG LR	KIRCHMAYR GIORGIO - DEL / (Tel)	<input type="radio"/>
<input type="radio"/>	GESTFIN Financial Initiating Agent	PETERME	DELEG CM	PETER-ZEEBERGH MARIJO - DEL	<input type="radio"/>
<input type="radio"/>	RESPCAD Verifying Agent for the DAC form	RADELLU	DEVCO R 01	RADELET LUC - L-41 07/014 (Tel) S	<input type="radio"/>
<input type="radio"/>	RESPOPE Operational Verifying Agent	VAZQUPO	DELEG LR	VAZQUEZ HORYAANS PAULA - DE	<input type="radio"/>
<input type="radio"/>					<input type="radio"/>
<input type="radio"/>					<input type="radio"/>
<input type="radio"/>					<input type="radio"/>

Submit Reset

Delete

Detail

Role GESTOPE - Operational Initiating Agent CRIS assignment DELEG LR - Delegation Liberia
 Login of the person in charge KIRCHGI - KIRCHMAYR GIORGIO
 Person in charge Breakdown No

Latest update

Login KIRCHGI Date of update 06/09/2011 17:01:24

6.2.2. Why associate the name of a person in charge with a role

In the 'Persons in charge' tab you can associate names with each role, in order to define who gives which visa and who is allowed to modify which information. You will only be able to do so when the person concerned has the necessary permissions.

You have to ask your LPM for the necessary permissions if you want to enter, modify or validate data in CRIS. You can access some fields and not others according to your role and the visas already given.

6.2.3. Effect of associating a name to a role

Associating a name to a role has the following effects.

- It indicates who the contact person is for this or that type of information (operational, financial, etc.).
- It shows the name of the person in charge in the visa sequence: this means that only the person indicated - or the person he/she has empowered - can give the visa requested.
- The entity appears in the list of visas to be given by a certain person (his/her personal current workflow).

If a name is not associated with a role, it means that:

- Nobody knows who the contact person is.
- The visa sequence only contains roles, not names, which means that anybody with the right permissions will be able to give the visa in question.
- The entity requiring a visa will not appear in anybody's personal current workflow.

6.2.4. Existing roles

In principle the 'Persons in charge' tab should contain the names of all the persons who have **to enter information in the different tabs of the CRIS file and to give visas for it in the 'Visas' tab.**

Amongst the different persons in charge we distinguish between encoders of information

- **initiating agents:** ENCOD, ENCCAD, GESTOPE, GESTAUD, GESTFIN etc, who introduce data.
- **verifying agents** (the abbreviation of the role begins with 'RESP' - RESPOPE, RESPFIN, RESPCAD), who check the data entered by the initiating agents.

Important! The verifying agents **cannot enter, modify information or attach documents.** If a correction is necessary, the verifying agent sends back the file to the previous step (through a RV visa) for correction.

The most common roles are:

- ENCOD: Data Entry Agent
- ENCCAD: Data Entry Agent for DAC form (only displayed for files created before March 2016, not required afterwards)
- RESPCAD: Verifying Agent for the DAC Form (only displayed for decisions created before March 2016, not required afterwards)
- GESTOPE: Operational Initiating Agent
- GESTAUD: Audit Task Manager
- RESPOPE: Operational Verifying Agent
- GESTFIN: Financial Initiating Agent
- RESPFIN: Financial Verifying Agent
- SIGNCC: Signatory framework Contract
- OVORDO: Overrule ORDO - see section 6.3.5 of this manual for more information.
- SIGNOR: ORDO signing in CRIS: for EDF Decision riders where the LMO and/or DLE dates are modified
- DIRGEO: Director; for payments on budget support that are managed by DEVCO and have to be approved by headquarters before RESPFIN; the Director's visa is valid only for two weeks (RESPFIN must visa the payment within this deadline). This visa applies only to Contract types - Implementation, Nature - PF, Sub-nature - ZO2.
- Competent Authority role in deviations & prior approvals only. This one can be different, according to the deviation/prior approval reason: DIRGEN (Director General), HEADOF (Head of Unit/Delegation), ASSOC (Associated Service) + Director (of the concerned Directorate) etc.

The CRIS visa circuit follow at least the **four eyes principles** mentioned in the Financial Regulation. This may vary from one module, which makes that sometimes we may have 6 and even 8 eyes:

- Decision Module: RESPOPE user must be different from RESPFIN user.
- Contracts Module: GESTOPE user must be different from GESTFIN user and RESPOPE user must be different from RESPFIN user.
- Deviations & Prior approvals: RESPOPE user must be different from RESPFIN user.

For **contracts with an Entity in charge DG ECHO**, the operational and financial initiating agents (GESTOPE & GESTFIN) can be the same user, and the operational and financial verifying agents (RESPOPE & RESPFIN) can be the same user.

For **decisions, contracts, and deviations & prior approvals with the domain PI (Partnership instrument)**, the operational and financial initiating agents (GESTOPE & GESTFIN) can be the same user, and the operational and financial verifying agents (RESPOPE & RESPFIN) can be the same user.

VISAS ABAC

In the case of persons who give their **visas in ABAC** there is **no need to insert the name of the person in charge in CRIS.** These visas are given in ABAC and are **repatriated in CRIS automatically** and they appear consequently in the 'Visas' tab. The visas in question are:

- **ORDO (to be granted in ABAC):** Authorising Officer
- **COMPTA (granted automatically in ABAC):** Accountant, automatical visa granted after the ORDO's visa.

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6.2.5. How to read a list of persons in charge

	Role	Login	CRIS assignment	Person in charge	Initiator	
<input checked="" type="radio"/>	GESTOPE	Operational Initiating Agent	KIRCHGI	DELEG LR	KIRCHMAYR GIORGIO - DEL / (Tel)	<input checked="" type="radio"/>
<input type="radio"/>	ENCCAD	Data Entry Agent for the DAC Form	KIRCHGI	DELEG LR	KIRCHMAYR GIORGIO - DEL / (Tel)	<input type="radio"/>
<input type="radio"/>	ENCOD	Data Entry Agent	KIRCHGI	DELEG LR	KIRCHMAYR GIORGIO - DEL / (Tel)	<input type="radio"/>
<input type="radio"/>	GESTFIN	Financial Initiating Agent	PETERME	DELEG CM	PETER-ZEEBERGH MARIJO - DEL	<input type="radio"/>
<input type="radio"/>	RESPCAD	Verifying Agent for the DAC form	RADELLU	DEVCO R 01	RADELET LUC - L-41 07/014 (Tel)	<input type="radio"/>

Detailed information for the line selected using the radio button



appears at the bottom of the screen.

Clicking on



opens an Outlook message addressed to this person with the entity's reference in the subject line.

Clicking on



shows the person's name, address, telephone and fax number.

Please note that there can be **only one initiator per entity**. The initiator is the person who initiates the entity:

- E.g.: for a Decision or a Contract, the initiator is the operational initiating agent.

6.2.6. How to add a new person in charge

If the **line** corresponding to the role to add **does not exist yet**, click on the first empty line available and fill in the following information.

	Role	Login	CRIS assignment	Person in charge	Initiator	
<input checked="" type="radio"/>	GESTOPE	Operational Initiating Agent	KIRCHGI	DELEG LR	KIRCHMAYR GIORGIO - DEL / (Tel)	<input checked="" type="radio"/>
<input type="radio"/>	ENCCAD	Data Entry Agent for the DAC Form	KIRCHGI	DELEG LR	KIRCHMAYR GIORGIO - DEL / (Tel)	<input type="radio"/>
<input type="radio"/>	ENCOD	Data Entry Agent	KIRCHGI	DELEG LR	KIRCHMAYR GIORGIO - DEL / (Tel)	<input type="radio"/>
<input type="radio"/>	GESTFIN	Financial Initiating Agent	PETERME	DELEG CM	PETER-ZEEBERGH MARIJO - DEL	<input type="radio"/>
<input type="radio"/>	RESPCAD	Verifying Agent for the DAC form	RADELLU	DEVCO R 01	RADELET LUC - L-41 07/014 (Tel)	<input type="radio"/>
<input type="radio"/>	RESPOPE	Operational Verifying Agent	VAZUPO	DELEG LR	VAZQUEZ HORYAANS PAULA - DE	<input type="radio"/>
<input type="radio"/>	ASSESSOR	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/>

Role

- Role: This is the role of the person in charge for the entity in question. You can only indicate a person's name if that person has the permissions associated to this role. The list of possible roles appears if you double-click on the yellow field or click on



- Login of the person in charge: Unique identification of the person in charge. His/her DG/Unit and name are automatically associated.
- Name of the person in charge: The name of the person in charge appears automatically on the basis of his/her login. Even if the person in charge does not have a login (and cannot therefore connect to CRIS or give a visa) his/her name can be indicated for information only. *e.g.: contact person in the Contractor's company*
- Initiator: see above
Do not forget to click on 'Submit' to save the information.

6.2.7. How to edit or delete existing information on a person in charge

If the **line** corresponding to the role **already exists**, you can **edit** the information by double-clicking on the role, login or name fields. You can also delete the line by clicking on the 'Delete' action button at the bottom of the screen. However you cannot delete the line

corresponding to the initiator.

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6.2.8. Who can edit the list of persons in charge

During the visa sequence:

When the visa requested is the visa of the operational initiating agent (GESTOPE) for the Decision/Contract concerned, he/she can edit the list of persons in charge.

When the visa requested is the visa of another person in charge (ENCOD, GESTFIN, RESPFIN, etc.), he/she can edit the name of the person in charge for the visa level he/she is at.

If the visa sequence is finished:

Only the operational initiating agent (GESTOPE) can modify the list of persons in charge for the Decision or Contract in question.

When a rider needs to be issued and signed on a Decision or Contract, it can be that the Persons in Charge of the rider are different from the Person in Charge of the original Contract. The Persons in Charge need to be updated to allow the correct people to grant their visa on the rider.

6.3. Visas

6.3.1. Access to the 'Visas' tab

Click on this tab to see the sequence of visas associated with the entity concerned.



A visa sequence has been predefined for each domain and entity.

The sequence sets out the stages involved (compulsory or optional) and the role required to be able to perform the visa function.

6.3.2. Layout of the 'Visa' tab

06/02/2014 15:23:45 **Decision (Level 1)**

General information Persons in charge Analytical breakdown Riders Financial breakdown

Visas Attached documents Pipe-line & forecasting Measure / Project External Monitoring / Evaluation / Audit Contracts

Identification

Decision Number: FED/2009/21344 Former system reference: LR-Liberia
 Title: Support to the Liberia Reconstruction Trust Fund (LRTF) Zone benefitting from the action: LR-Liberia
 EU contribution: 60,200,000.00 EUR Total cost: 60,200,000.00 EUR

Information

Step number	Requested Visa			Signature			Comment
	Role	CRIS assignment	Name	Acceptance	Signature date	Name	
<input checked="" type="radio"/> 80xd	GESTO80			AC	26/10/2009 15:20	REYNAUD Sylvie	
<input type="radio"/> 70x	COMPTA			AC	20/10/2009 17:09	Interface	WF-BATCH...
<input type="radio"/> 60x	ORDO			AC	20/10/2009 17:09	Interface	TRIMUL...
<input type="radio"/> 40xt	RESPFIN			AC	01/08/2009 15:52	BOSSE Doerte	
<input type="radio"/> 30x	GESTFIN	DELEG CM	PETER-ZEEBERGH MARU	AC	30/06/2009 11:19	PETER-ZEEBERGH MARUO	

Visa Modify

This step has already received a visa! You may only consult it. (21009)VISA.VisaGetData

Detail

Step number: 80 Signature date: 26/10/2009
 Acceptance: AC - Accepted – approve the encoding of the transaction and move it to the next step.
 Return to step number: Error code:
 Step meaning: SCF - Signature Financing Agreement
 Role: GESTO80 - Operational Initiating Agent (visa 80) CRIS assignment:
 Viseur: Envol E-mail:
 Comment:

Name: REYNAUD Sylvie DG / Unit: AIDCO C 03

Latest update

Login: REYNASY Date of update: 26/10/2009 15:20:10

The screen is divided into three parts:

- The **identification** part: repeats the main data from the 'General Info' tab.
- The **information** part: indicates the sequence of visas in order from bottom to top.
- The **detail** part of the screen (lower part) gives the details of the line in the visa sequence whose radio button is on (e.g.: here, level 80).

6.3.3. How to read the visa sequence

The sequence of visas should be read from bottom to top in the Information zone. The details of the visa selected appear at the bottom of the screen.

Information

Step number	Requested Visa			Signature			Comment
	Role	CRIS assignment	Name	Acceptance	Signature date	Name	
<input checked="" type="radio"/> 80xd	GESTO80			AC	26/10/2009 15:20	REYNAUD Sylvie	
<input type="radio"/> 70x	COMPTA			AC	20/10/2009 17:09	Interface	WF-BATCH...
<input type="radio"/> 60x	ORDO			AC	20/10/2009 17:09	Interface	TRIMUL...
<input type="radio"/> 40xt	RESPFIN			AC	01/08/2009 15:52	BOSSE Doerte	
<input type="radio"/> 30x	GESTFIN	DELEG CM	PETER-ZEEBERGH MARU	AC	30/06/2009 11:19	PETER-ZEEBERGH MARUO	

6.3.3.1 Step number

The left-hand side of the screen shows the numbers of the various visa steps, which allows them to be put in order. Next to the number is a radio button which allows you to select the line and display the detail of the visa concerned in the lower part of the screen (e.g.: to read comments, etc.).

6.3.3.2. Requested visa

If the name of the person in charge has been entered on the 'Persons in charge' tab, it appears in the column 'Requested visa', next to the corresponding role

Example: here, lines 10, 15, 25 and 30.

In that case only the person mentioned - or the person who he/she has empowered - may give the visa.

If there is no name entered on the 'Persons in charge' tab (in the example, line 20), anyone with the appropriate permissions can visa.

6.3.3.3. Signature

The right-hand side column shows the list of visas actually given.

Acceptance: indicates the type of visa given (acceptance, referral back, cancellation, etc.)

Date of signature: indicates the date and time when the visa was given

Name: indicates the name of the person who actually gave the visa. If the name is different from the name given under 'requested visa', the visa was given by someone who had received an empowerment.

In the case of visas given in ABAC and copied to CRIS, you will see the word 'Interface' and the login of the signatory in the 'Comments' field.

Comments: To the far right, you can read any comments on the visas. If the visa has been copied from ABAC, you see the signatory's login.

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6.3.4. Types of visa: compulsory, temporary, definitive, automatic

There are different types of visa.

6.3.4.1 Compulsory visa

Compulsory visas (**x**) must be given before the next level visa can be given.

On the other hand, a visa that is not compulsory does not have to be given at all or may be given later, irrespective of the order imposed by the sequence.

6.3.4.2. Temporary visa

Temporary visas (**t**) trigger entry of the amounts in the accounts.

In the approval sequence of a Decision or Contract, for example, a temporary visa triggers a corresponding commitment and sends the transaction to ABAC for visa by the Authorising Officer and Accounting Officer.

6.3.4.3. Definitive visa

A definitive visa (**d**) closes the visa sequence. You can no longer go back to the previous stage once the definitive visa is given.

In the case of a Decision, for example, when the final visa is given, the entity assumes 'Ongoing' status: the Decision is ongoing and work can start on preparing the related Contracts and/or riders.

In the case of a Contract, when the final visa is given, the entity has the 'Ongoing' status: the Contract is active and work can start on preparing the related Invoices in ABAC and/or riders.



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6.3.4.4 Automatic visa

Visas by the the Authorising Officer (ORDO) and the Accountant (COMPTA) are always given in ABAC but automatically copied into CRIS.

Visas for the role GESTITF are automatic visas which allow a transaction to be sent to ABAC through the interface. These visas are known as 'automatic visas'.

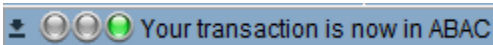
In the above case, they are displayed as follows:

<input type="radio"/> 70x	COMPTA			AC	10/10/2008 06:28	Interface 	WF-BATCH...
<input type="radio"/> 60x	ORDO			AC	10/10/2008 06:28	Interface 	PLATTGU...
<input type="radio"/> 50	GESTITF						

Name: Interface

Comments: login of person who gave the visa in ABAC

The streetlights show the status of the transaction in ABAC:



- A green light shows that the transaction has successfully passed in ABAC;
- A yellow light indicates an issue - please check the error message displayed;
- A red light indicates that a blockage prevents the transaction from passing. Please check the error message displayed and, if necessary, contact DEVCO APPLICATION SUPPORT.

In order to see/hide the automatic visas, click on the arrow on the left of the traffic lights:

Step number	Role	CRIS assignment
Your transaction is now in ABAC		
<input type="radio"/> 80x	GESTFIN	M02_DEVCO R 08
<input type="radio"/> 70x	COMPTA	
<input type="radio"/> 60x	ORDO	
<input type="radio"/> 40x	RESPFIN	M02_DEVCO R 08
<input type="radio"/> 30x	GESTFIN	M02_DEVCO R 08
<input type="radio"/> 25x	RESPOPE	DEVCO R 06
<input type="radio"/> 20x	ENCCAD	
<input type="radio"/> 15x	GESTOPE	DEVCO R 06

Step number	Role	CRIS assignment
Your transaction is now in ABAC		
<input checked="" type="radio"/> 99xd	GESTIFF	DEVCO R 06
<input type="radio"/> 96x	GESTIFF	DEVCO R 06
<input type="radio"/> 95x	GESTIFF	DEVCO R 06
<input type="radio"/> 91x	GESTIFF	DEVCO R 06
<input type="radio"/> 90x	GESTIFF	DEVCO R 06
<input type="radio"/> 86x	GESTIFF	DEVCO R 06
<input type="radio"/> 85x	GESTIFF	DEVCO R 06
<input type="radio"/> 80x	GESTFIN	M02_DEVCO R 08

6.3.5 Visa values: acceptance codes AC, CC, RV, SP, VL, SO, OH

The current acceptance codes are:

6.3.5.1 AC - Accepted

You approve the data in the entity at the stage concerned with this code and pass on the file to the next person in charge in the visa sequence. Once this visa is granted, data that has been validated can no longer be modified. The fields are no longer accessible. Only the next person in the visa sequence can modify data or refer the file back to an earlier step in the sequence for correction.

<input type="radio"/> 20x	RESPOPE	DELEG LR	JENNER Martin	AC	20/05/2009 19:11	JENNER Martin
<input type="radio"/> 19x	RESPCAD	DEVCO R 01	RODRIGUEZ RODRIGUEZ	AC	20/05/2009 09:06	RODRIGUEZ RODRIGUEZ MARIA ESTRELLA

6.3.5.2. CC - Refused

This code implies the permanent and final cancellation of the entity concerned. The visa sequence is therefore closed. The cancellation of an entity must be justified in the 'Comment' field.

When an entity is cancelled, it is permanently cancelled: it will be marked in CRIS for no further action and can no longer be retrieved or edited. The only exception to this rule is the Request for Services in the 'Framework Contract' module: if a Request for Services is rejected, you can always create a new version of the same request.

6.3.5.3. RV - Sent back

This code means that an entity is sent back to a previous step in the visa chain. You must therefore:

- justify why the file is being sent back in the 'Comment' field, **or** choose an error code (e.g. INSUF - incomplete data).
- indicate in the 'Return to step number' field the previous step to which the transaction is to be sent to.

An RV visa means that:

- the person responsible for the step concerned can access the data again to correct or update it, and
- a new visa sequence can start from the desired stage.

e.g.: referral from No 40 to No 30 and new sequence starting from stage 30.

30x	GESTFIN		AC	29/03/2013 15:26	PESCATORE LUCA	
40x	RESPFIN		RV	29/03/2013 15:25	HINTERDORFER EVELINE	modification FDL...
30x	GESTFIN		AC	29/03/2013 15:09	PESCATORE LUCA	

After the transactions has reached a certain level (usually after the transfer of financial information to ABAC), no RV or CC visa is possible:

e.g. : GESTO80 for the decisions, GESTFIN 80 for the contracts, Competent Authority's visa for deviations & prior approvals.

6.3.5.4. SP - Suspended

The 'Suspended' code temporarily interrupts the visa sequence until a particular event occurs (e.g.: when waiting for data). You must justify the suspension in the 'Comment' field in such cases.

When a suspension visa is given, a new visa line is automatically generated at the same level as the line suspended. The person in charge can issue a new visa as soon as the information has been received.

Information

Step number	Requested Visa			Signature			
	Role	CRIS assignment	Name	Acceptance	Signature date	Name	Comment
80x	GESTFIN	DELEG GT	PERUSSINA JUAN JOSE				
75x	GESTIFF						
70x	COMPTA						
60x	ORDO						
40x	RESPFIN	DELEG GT	DUCH ALONSO JORGE				
30x	GESTFIN	DELEG GT	PERUSSINA JUAN JOSE				
30x	GESTFIN	DELEG GT	PERUSSINA JUAN JOSE	SP	07/04/2014 16:58	PERUSSINA JUAN JOSE	Suspension reason...
25x	RESPOPE	DELEG GT	TANTTARI LISA	AC	12/03/2014 23:45	TANTTARI LISA	
20x	ENCCAD			AC	12/03/2014 23:37	MARTINEZ ROSALES RODOLFO ALEJANDRO	

Buttons: Visa, Modify

Detail

Step number: 30
 Acceptance:
 Return to step number:
 Step meaning: IF - Visa Initiateur Financier
 Role: GESTFIN - Financial Initiating Agent
 Viseur: PERUSJU
 Comment:
 Name: PERUSSINA JUAN JOSE
 DG / Unit: DELEG GT

Signature date: 07/04/2014
 Signature:
 Error code:
 CRIS assignment: DELEG GT - Delegation Guatemala
 Envoi E-mail:

6.3.5.5. VL - Validation

A 'Validation' visa is not a real visa: it simulates the checks performed by CRIS at the GESTFIN visa only and ensures that the data is complete and correct, without actually giving the visa.

The idea is to check the data and make sure that the following visas can be accepted without any problems. It is typically used at GESTFIN level to check data before the record is passed on to the RESPFIN.

If the check does not return any error messages, the following message will be displayed: 'Validation function completed'.

Validation function completed (21485)

Detail

Step number: 10
 Acceptance: VL
 Signature date: 01/03/2005
 Signature:

6.3.5.6. SO - Send for Overrule

Can be used only by the RESPOPE and RESPFIN roles. This visa is used when they do not accept a certain transaction because, in their opinion, it doesn't comply with the established policies and procedures. The Authorising Officer (ORDO) must therefore be able to "overrule" their refusal.

By using this visa, the overrule action is made visible and traceable.

Before granting this SO visa, the RESPOPE or RESPFIN must identify the login for the OVORDO role in the Persons in Charge tab.

A comment is required when granting the SO visa. The OVORDO will then be able to overrule the 'refusal' of the previous step by granting the AC visa.

Information							
Step number	Requested Visa			Signature			
	Role	CRIS assignment	Name	Acceptance	Signature date	Name	Comment
Your transaction is now in ABAC							
<input type="radio"/> 80x	GESTFIN			AC	27/12/2012 14:42	HUSUSAN LEORA	FDI less than 18M...
<input type="radio"/> 70x	COMPTA			AC	10/12/2012 14:20	Interface	WF-BATCH...
<input type="radio"/> 60x	ORDO			AC	10/12/2012 14:20	Interface	HITZLGE...
<input checked="" type="radio"/> 41x	OVORDO	ELARG D 03	ENGSTROEM YNGVE	AC	10/12/2012 12:55	ENGSTROEM YNGVE	In order to proceed with ...
<input type="radio"/> 40x	RESPFIN	ELARG E 03	HACHEZ DANIEL	SO	06/12/2012 10:36	HACHEZ DANIEL	SO visa - see Ares (2012)1...
<input type="radio"/> 30x	GESTFIN			AC	05/12/2012 17:04	VIEZZER CRISTIANA	Respin decision for SO v...
<input type="radio"/> 25x	RESPOPE	ELARG D 03	BERTOLINI NICOLA	AC	09/11/2012 14:35	BERTOLINI NICOLA	
<input type="radio"/> 15x	GESTOPE	ELARG D 03	GHARBI ALYA	AC	09/11/2012 11:26	GHARBI ALYA	
<input type="radio"/> 13x	ENCCAD			AC	08/11/2012 17:56	GHARBI ALYA	
<input type="radio"/> 10x	ENCOD	ELARG D 03	GHARBI ALYA	AC	08/11/2012 17:20	GHARBI ALYA	

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6.3.6 How to issue a visa

Select the line for the visa level required by clicking on the corresponding radio button and then complete the lower half of the screen where the detailed information on that visa stage is displayed:

Information							
Step number	Requested Visa			Signatory			
	Role	DG / Unit	Name	Acceptance	Signature date	Name	Comment
<input checked="" type="radio"/> 20xd	SIGNCC	DEVCO R 06	User Formation 01				
<input type="radio"/> 10xt	GESTOPE	DEVCO R 06	VAN DEN BERGEN Fabie	AC	01.03/2005 14:34	VAN DEN BERGEN Fabienne	

Visa
New
Modify
Delete

Detail

Step number	20	Signature date	01/03/2005
Acceptance	<input type="text" value="RV"/>	Signature	<input type="text" value="*****"/>
Return to step number :	<input type="text" value="10"/>	Error code	<input type="text" value=""/>
Step meaning	VSC - Visa signataire Contrat Cadre	DG / Unit	DEVCO R 06 Computer systems, Office technology
Role	SIGNCC - Signatory framework contract	Envoi E-mail	<input type="checkbox"/>
Visueur	CRISU01		
Comment	<input type="text" value="Please correct terms of reference"/>		

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The following data is automatically displayed:

- **Step number:** step number in the sequence
- **Date of signature:** CRIS will give the current date
- **Step meaning:** A step meaning code can be associated with each stage of the visa sequence. This code triggers validation or certain related processes.
- **Role:** Role of the person who has to visa.
- **Send e-mail**
The following details have to be entered:

- **Acceptance:** AC, CC, RV, SP, VL or SO (see above: Visa values)
- **Signature:** Each visa requires the electronic signature defined in the user's identification screen. If you forgot it, you can ask your LPM to reset it and insert a new one on the user data screen (Administration/Security/User).
- **Error code:** The 'Error code' field gives you access to a predefined list of standard errors. If you cannot find what you are looking for in the list, you can enter your own comments in the 'Comments' field.
- **Viseur:** If you received an empowerment (see chapter 6.3.10) and that you give the visa please enter your user id in this field if it does not appear.
- **Comments:** Must be completed if you give a 'refused', 'sent back', 'suspended' or 'overrule' visa. When finished, click on 'Submit'.

6.3.7 Effect of issuing visas

The issuing of visas has several consequences which are explained in the manuals specific to each entity. They can be summarised as follows.

1. Some visas are subject to checks to ensure data consistency.
2. Depending on the visa step concerned, some fields may become inaccessible for editing as the data have already been validated.
3. Issuing a temporary visa sends the accounting transaction to ABAC.
4. In some cases, new tabs may appear (e.g. framework Contract).
5. Giving a visa changes the status of the entity concerned (e.g.: a Decision becomes DE - Decided after the RESPFIN visa).

6.3.8 List of visas required

There are various ways of finding the list of visas you are required to give.

6.3.8.1. Personal current workflow

When you enter CRIS, you can see your personal current workflow in the bottom half of the screen.

The screenshot shows a web application window titled 'Login' with the date and time '01/03/2005 16:24:03'. Below the title bar is a 'Modify' button. The main content area is divided into three sections:

- Personal Information:** A list of user details including Login (CRISU01), Name (User Formation 01), Address (L-41 08/12), Tel (99001), Fax (98001), Email (crisu01@cec.eu.int), DG / Unit (Computer systems, Office technology), Language (French), Number of active procurements (0), and Color profile (Blue).
- Personal current workflow:** A table with the following data:

Reference	Title	Entity	Step meaning - Role
ASIE/2005/100-622 (Add.2)	Test.jpc	Contract	40 - RESPFIN
CRIS/2005/017-237	Décision TEST NOKONI-VDB-description	Decision (Level 1)	10 - ENCOD
DDH/2005/017-231	test.CD.Décision 1	Decision (Level 1)	10 - ENCOD
- Personal workflow (financial forecasts):** A table with the following data:

Reference	Title	Entity
ONG-PVD/2000/011-590	RENFORCEMENT DES CAPACITES D'AUTONOMIE DES ECOLES COMMUNAU- TAIRES,CERCLES DE TOMINIAN ET PAYS DOGON-MALI	Contract
CRIS/2005/017-237	Décision TEST NOKONI-VDB-description	Decision (Level 1)
DDH/2005/017-231	test.CD.Décision 1	Decision (Level 1)
FOOD/2002/002-356	FOOD SECURITY 2002 FRAIS PERSONNEL LOCAL DELEGATIONS	Decision (Level 1)

The list gives the entity's reference, title and type as well as the visa step number and corresponding role. A hyperlink takes you to the visa page for the entity concerned where you can give the visa required.

6.3.8.2 'My files' / 'My workflow' menu

The same list can be found using the 'My files' menu and 'My workflow' sub-menu. You see the following page:

02/04/2014 15:26:44 Visas

Your selection returned 5 records (21120)general.PrcQueryReturnMessage

Search results

Reference	Login - CRIS assignment	Entity	Step meaning - Role	Since
FED/2012/ 082-800	POULS-ROBLES KARIN - DELEG LS	Audit Request	20 - GESTAUD	174
FED/2012/ 082-801	POULS-ROBLES KARIN - DELEG LS	Audit Request	20 - GESTAUD	751
FED/2012/ 082-804	POULS-ROBLES KARIN - DELEG LS	Audit Request	20 - GESTAUD	751
FED/2013/ 088-811	POULS-ROBLES KARIN - DELEG LS	Audit Request	10 - ENCOD	174
EuropeAid/132-121/L/ACT/LS	POULS-ROBLES KARIN - DELEG LS	Offer evaluation process	10 - PRESJUR	510

6.3.8.3 'Tools' / 'To be signed' menu

You can also use the 'Tools' menu, 'To be signed' sub-menu.
 A window opens for you to select the type of workflow: Visa workflow or Financial forecast workflow.

01/03/2005 16:13:35 Visas

Type of list

Type of list

The search screen displayed will differ slightly depending on your selection.
 To search for a 'visa workflow', you can specify an entity, role, unit and/or login. To search for a 'financial forecast workflow', you can specify a domain, DG/Unit, login and/or Delegation in Charge.
 For instance, you can display the list of records to be signed by your Head of Unit.

06/02/2014 15:51:51 Visas

Type of list

Type of list

Maximum number of records to be found

Search criteria

Entity =

Role =

CRIS assignment =

Login =

Example: search for all visas pending for Mr Barata
 Click on 'Submit' to find the list of all the visas that correspond to the search criteria.

06/02/2014 15:56:06 Visas

Your selection returned 8 records (21120)general.PrcQueryReturnMessage

Search results

Reference	Contract title	Entity	Step meaning - Role	Since
DCI-NSAPVD/2013/320-943	Sustainable agriculture development for smallholder and marginalised farmers in far western hill of Nepal	Contract	40 - RESPFIN	6
FED/2014/ 065-371 (Add.2)		Financial guarantee	30 - RESPFIN	65
EuropeAid/131-649/L/ACT/CM		Offer evaluation process	70 - PRESJUR	737
EuropeAid/133-116/L/ACT/CM		Offer evaluation process	70 - PRESJUR	458
EuropeAid/133-584/L/ACT/NP		Offer evaluation process	60 - PRESJUR	254
EuropeAid/133-584/L/ACT/NP		Offer evaluation process	60 - PRESJUR	254
EuropeAid/134-608/L/ACT/NP		Offer evaluation process	60 - PRESJUR	128
EuropeAid/134-608/L/ACT/NP		Offer evaluation process	60 - PRESJUR	128

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6.3.9 Global visa

If you have to give several visas, this can be done in a batch. Do this in two steps:

1. Search the list of visas to be given via the 'Tools / to be signed' menu, using your login as search criterion (see above).
2. Tick the boxes to the left of the references you want to visa, insert your signature and click on 'Global visa'.

01/03/2005 16:51:07 Visas

Your selection returned 4 records (21120)

	Reference	Title	Entity	Step meaning - Role
<input type="checkbox"/>	EuropeAid/121-152/C/SV/M/L	Test du 1er mars - Pascal	Call for tender	10 - ENCOD
<input checked="" type="checkbox"/>	ASIE/2005/017-238	test 125	Decision (Level 1)	10 - ENCOD
<input checked="" type="checkbox"/>	ASIE/2005/017-239	test	Decision (Level 1)	20 - RESPOPE
<input type="checkbox"/>	DDH/2005/017-226	Test - GM - Décision 1	Decision (Level 1)	10 - ENCOD

Signature: [Signature field] Global visa

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This allows you to give several visas without having to open the visa tab for each entity.

Be careful, of course, when using this function: make sure you have verified that the data in the entities is correct.

6.3.10 Empowerment

In this section we present the best practice regarding empowerments.

6.3.10.1 Mission - Holiday

When you go on mission or on holiday you give already on paper an empowerment. So the person who will give the visa for you will receive the paper file.

- 1) Be sure that those persons have the correct permissions in CRIS!
- 2) They will then go in CRIS in the entity to be visa-ed in the Visa tab.
- 3) In this tab, they put their visa like in section 6.3.6 after having checked that everything is ok.
- 4) The most important point is to fill in the field "VISEUR" with their own login!
- 5) Do NOT change the Person in charge tab as it is still the correct person except that he/she is not in the office!

6.3.10.2. Leaving the Delegation or the Unit

Only when someone leaves the delegation or the Unit and is replaced by someone else, you must change the Person in charge tab.

6.4. Analytical breakdown

6.4.1 Introduction: types of breakdown

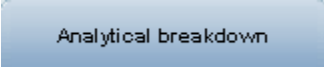
There are several types of breakdown in CRIS, each designed to divide or split a total into smaller levels for easier follow-up by amount, percentage or quantity.

For example:

- The **Analytical Breakdown** breaks the budget down into individual headings (of the Financing Agreement budget) or items (of the Contract budget) on the basis of the structure given in the Financing Agreement, Contract, etc. This breakdown will allow for subsequent allocations.
- The **Financial Breakdown** links accounting transactions (commitments, payments, etc.) to the appropriate budget line, level 1 commitment, etc.
- The **Statistical Breakdown** breaks the total amount of the entity down into a series of codes allowing statistics to be produced based on specific indicators, e.g. sector codes, geographical codes, target groups, etc.

6.4.2. Go to the 'Analytical breakdown' tab

Click on this tab to see the Analytical Breakdown of the entity concerned (Decision Level 1, Contract, etc).



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6.4.3. Layout of the 'Analytical Breakdown' tab

The screen is divided into three parts:

- The **identification** part: repeats the main data from the 'General Info' page.
- The **information** part: shows a table of the headings in the Financing Agreement or Contract budget.

Items can be broken down into sub-levels and these into further sub-levels, and so on. You can have up to 5 sub-levels (02.01.01.01.01) if necessary.

Example: Level 02 - EU contribution has been broken down into three sub-levels 02.01, 02.02 and 02.03.

The specified amount in level 02 is equal to the sum of the amounts specified at sub-levels 02.01, 01.02 and 02.03.

- The **detail** part of the screen (lower part) gives the details of the line in the budget table indicated by the radio button. It also contains the action buttons allowing you to add, modify or delete levels.

Example: Here the detail of level 02.03 is shown in the lower part of the screen.

07/03/2005 14:31:07 **Decision (Level 1)**

Riders Attached documents Pipe-line & forecasting Measure / Project External Monitoring / Evaluation / Audit Contracts

General information Persons in charge Visas **Analytical breakdown** Financial breakdown Decentralised breakdown

Identification

Decision No ALA/2005/17241 Former system reference
 Title Test FA : Nicaragua : strengthening of social centers and family planning services Geographical Zone NI-Nicaragua
 EU contribution 20,000,000.00 EUR Total cost 25,000,000.00 EUR

Upper level Show all levels Contract all levels Gestion Quantity Amount

Information

Serial No	Title	Break type	Planned amount (final)	Used amount (final)	Balance	Co-Fi	All?
01	Total cost	CT	25000000			CT	N
02	EU Contribution	UE	20,000,000.00			UE	N
02.01	Support actions	AP	8000000			UE	Y
02.02	Seminar / Conference	SC	10000000			UE	Y
02.03	Technical assistance	AT	2000000			UE	Y
03	Other contributions	AC	5000000			AC	N

Submit Reset UE amount 20000000

New level New sublevel Modify Delete

Detail

Serial No 02.03 Allocable ? Co-financing type UE - EU contribution
 Break type AT - Technical assistance Title Technical assistance
 Planned amount (in workflow) Planned amount (final) Used amount (in workflow) Used amount (final) Balance
 2,000,000.00 0.00 0.00 0.00 2,000,000.00

Pay attention: all the paid and recovered amounts need to be entered manually in the dedicated fields displayed on the bottom of the screen (by the GESTOPE).

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6.4.4. Show some or all of the analytical items

6.4.4.1. Collapse all levels

If an Analytical Breakdown is particularly complex, it can be collapsed so that only its main elements are shown. If you want to see only the upper level, click on 'Contract all levels'.

Upper level Show all levels **Contract all levels**

Information

Serial No	Title	Break type	Planned amount (final)	Used amount (final)	Balance	Co-Fi	All?
01	Total cost	CT	25,000,000.00			CT	N
02 +	EU Contribution	UE	20,000,000.00			UE	N
03	Other contributions	AC	5,000,000.00			AC	N

The items subdivided into sublevels will then be shown followed by a '+' sign.

6.4.4.2. Show sub-levels of a collapsed item

If you click on the '+' sign next to the item, you can see the lower levels for this item.

Upper level		Show all levels	Contract all levels				
Information							
Serial No	Title	Break type	Planned amount (final)	Used amount (final)	Balance	Co-Fi	All?
02+	EU Contribution	UE	20,000,000.00			UE	N
02.01	Support actions	AP	8,000,000.00			UE	Y
02.02	Seminar / Conference	SC	10,000,000.00			UE	Y
02.03	Technical assistance	AT	2,000,000.00			UE	Y

If you want to go back to the level above the one displayed, click on 'Upper level'.

6.4.4.3 Show all levels

If you want to see every level, click on 'Show all levels'.
You must show the full budget table in order to insert new items.

6.4.5. Analytical breakdown templates

In most cases the Analytical Breakdown is based on a tree structure predefined in a **template**.
A template is a model for a breakdown:

- for a type of entity (level 1 Decision, implementation Contract, etc.)
- in a particular domain;
- which can be adapted to purpose

e.g. the breakdown by type of cost is not the same for an implementation Contract in the ENPI domain as it is for a grant Contract in the ONG-PVD domain.

Whenever you create an Analytical Breakdown, CRIS will propose the template for you to adapt to your needs.

Examples of templates

- The budget for a Decision (level 1) is broken down by heading:

Serial No	Title	Break type	Planned amount (final)	Used amount (final)	Balance	Co-Fi	All?
01	Total cost	CT	0			CT	N
02	EU Contribution	UE	0			UE	Y
03	Other contributions	AC	0			AC	N

- The budget for an implementation Contract is broken down as follows:

Serial No	Title	Break type	Planned amount (final)	Used amount (final)	Balance	Inv. Overrun %	All?
01	Total amount	NP	0			0	Y
99	Non imputable	NI				0	N
99.01	Non consommé	NC	0.00			0	Y
99.02	Avances	AV	0.00			0	Y
99.03	Pénalités	PE	0.00			0	Y
99.04	Recouvrements	RC	0.00			0	Y
99.05	Rétentions	RT	0.00			0	Y

- The budget for a specific Contract for the BENEF framework Contract is broken down into items according to the nature of the costs (fees, per diem...)

Serial No	Title	Break type	Planned amount (final)	Used amount (final)	Balance	Inv. Overrun %	All?
<input type="radio"/> 01	Fees	HN	0			0	Y
<input type="radio"/> 02	Per Diem	PD	0			0	Y
<input type="radio"/> 03	Reimbursable expenses	RM	0.00			0	Y
<input type="radio"/> 03.01	International travel	VO	0			0	N
<input type="radio"/> 03.02	Local transport	TR	0			0	N
<input type="radio"/> 03.03	Support staff	PN	0			0	N
<input checked="" type="radio"/> 03.04	Others	AU	0			0	N
<input type="radio"/> 99	Non Imputable	N				0	N
<input type="radio"/> 99.01	Avances	AV	0.00			0	Y
<input type="radio"/> 99.02	Pénalités	PE	0.00			0	Y
<input type="radio"/> 99.03	Non Consumé	NC	0.00			0	Y
<input type="radio"/> 99.04	Recouvrements	RC	0.00			0	Y

top ^

6.4.6 Modify an existing item

Select the item by clicking on the radio button on the left-hand side: the 'Detail' part of the screen shows the present state of this item. Click on 'Modify' and insert the required changes. See below for an explanation of the fields in the 'Detail' part. Click on 'Submit'.

6.4.7 Add a new item

6.4.7.1. New level or new sub-level?

In the 'Detail' part of the screen:

- Click on 'New level' to add a new item at the **same level** as the selected item.
- Click on 'New sub-level' to add a new item at a **level below** the selected item.

Example:

03/06/2009 14:32:42 **Decision (Level 1)**

Visas Attached documents Pipe-line & forecasting Measure / Project External Monitoring / Evaluation / Audit Contracts

General information Persons in charge **Analytical breakdown** Riders Financial breakdown

Identification

Decision No DCI-ALA/2009/21665 Former system reference
 Title Academic Mobility Programme Brazil 2007-2010 Zone benefiting from the action BR-Brazil
 EU contribution 600,000.00 EUR Total cost 658,900.00 EUR

Upper level Show all levels Contract all levels

Information

Serial No	Title	Break type	Planned amount (final) (€)	Used amount (final) (€)	Balance (€)	Co-Fi	All?
01	Cost total/Total Cost	CT	658900			CT	N
02	Contribution UE	UE	600000			UE	Y
03	Autres Contributions/Other Contribu	AC	58900			AC	N

Submit Reset UE amount 600000

New level **New sublevel** Modify Delete

Detail

Serial No **02.01** Allocable?
 Break type BO Co-financing type UE - EU contribution
 Title Scholarships

Planned amount (in workflow)	Planned amount (final)	Used amount (in workflow)	Used amount (final)	Balance
450000	0.00	0.00	0.00	0.00

Latest update

Login GRAEVFR Date 03/06/2009 14:33:10

Submit

In order to create a new sub-level 02.01 in the item 02 - EU Contribution:

- Click on the radio button next to level 02
- Click on 'New sub-level'
- Fill in the data for level 02.01
- Click on 'Submit'.

In order to create a new level 02.02, you can:

- either re-select level 02 and click on 'New sublevel' (to add a new level below 02)
- or select level 02.01 and click on 'New level' (to add an item at the same level as 02.01).

6.4.7.2. Information needed to create a new (sub)level

Detail

Serial No **02.01** Allocable?
 Break type BO Co-financing type UE - EU contribution
 Title Scholarships

Planned amount (in workflow)	Planned amount (final)	Used amount (in workflow)	Used amount (final)	Balance
450000	0.00	0.00	0.00	0.00

Serial number: i.e. the number of the new item.

Before you fill in the information always check that the proposed number corresponds to the level you want to use. There can be up to 5 breakdown levels, e.g. level 02.01.01.01.01.

Allocable?: If you check this box, the item becomes allocable, i.e. a lower level can later be charged to it (see below: analytical items: allocable or non-allocable)

Co-financing type: (only for level 1 Decisions) This field is filled in automatically according to the chosen level. There are 3 co-financing types:-
 CT: Total cost- UE: EU contribution- AC: Other contributions

'CT: total cost' is the sum of the EU contribution and AC co- financing

Break type: Nature of the analytical item inserted. By double-clicking on the yellow field you go to a list of breakdown types. (e.g.: fees, per diem, travel...)

Title: If the breakdown type title proposed is suitable, leave the 'Title' field blank: the title will be inserted automatically.

If the breakdown type title proposed is unsuitable, insert the title you want in the 'Title' field.

Planned amount: Insert the amount planned for this item.

This can be given in the detail of the level selected (bottom part of the screen) or directly in the table with the whole Analytical Breakdown.

For an item subdivided into sublevels, the planned amount is equal to the sum of the associated amounts at the lower level(s).

After you have entered all the items in the 'Detail' part, do not forget to save the whole Analytical Breakdown by clicking on 'Submit' below the budget table.

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6.4.8 Analytical items: allocable / non allocable

6.4.8.1. What does 'allocable' mean

You have to indicate whether an item is allocable or not, i.e. whether a lower entity can be linked to the item later on.

For a **Decision (level 1)**, if an item is allocable, items of Contracts linked to the Decision can be charged to this item of the Decision.

For a **Contract**, if an item is allocable, the items of Invoices linked to this Contract can be charged to this item of the Contract.

6.4.8.2. How can you indicate that an item is allocable

This information can be indicated:

- either in the 'Detail' (lower part of the screen): by ticking the box 'Allocable?'

Serial No	Allocable ?
02.01	<input checked="" type="checkbox"/>

- or in the 'Information' part, in the 'All?' (Allocable?) column: Each item is followed by a Y (Yes = allocable) or a N (No = non allocable)

Serial No	Title	Break type	Planned amount (final)	Used amount (final)	Balance	Co-Fi	All?
01	Total cost	CT	25000000			CT	N
02	EU Contribution	UE	20,000,000.00			UE	N
02.01	Support actions for social sector	AP	8000000			UE	Y
02.02	Seminar / Conference	SC	10000000			UE	Y
02.03	Technical assistance	AT	2000000			UE	Y
03	Other contributions	AC	5000000			AC	N

6.4.8.3. Special case: items subdivided into sub-levels

If an item is subdivided into sub-levels, you have to choose:

- either you allocate to the upper level, but none of the sub-levels:

02	EU Contribution	UE	20,000,000.00			UE	Y
02.01	Support actions for social sector	AP	8000000			UE	N
02.02	Seminar / Conference	SC	10000000			UE	N
02.03	Technical assistance	AT	2000000			UE	N

In this case the amounts shown for the sub-levels are displayed for your information only. When you create the lower entity, there is a check to ensure that you do not exceed the amount foreseen for the upper level, but no check on possible overspending on the sub-levels. The follow-up will be more flexible but at the same time less precise.

- or you allocate on **all sub-levels** but not on the upper level.

In this case the link is made to each sub-level amount. When you create the lower entity, there is a check to ensure that you do not spend more than the amount foreseen for each item.

02	EU Contribution	UE	20,000,000.00		UE	N
02.01	Support actions for social sector	AP	8000000		UE	Y
02.02	Seminar / Conference	SC	10000000		UE	Y
02.03	Technical assistance	AT	2000000		UE	Y

6.4.8.4. N.B.

In the Analytical Breakdown of a Decision (level 1) only heading 02-EU contribution (or its sub-levels) is considered allocable, i.e. you can only allocate Contracts for measures financed by the EU contribution.

Measures implemented on the basis of contributions from sources other than the EU cannot be monitored.

Heading 02 - EU Contribution can however be broken down in allocable sub-levels.

6.4.9. Checking that the Analytical Breakdown is correct

When the Financial Verifying Agent grants his/her visa, CRIS checks a number of elements to ensure that the Analytical Breakdown is correct. The points below can be checked to avoid errors.

6.4.9.1 Check the amounts of the Analytical Breakdown against those entered in the General Information tab

Please check the amounts entered in the Analytical Breakdown against those included in the general information tab, which are displayed in the 'Identification' (upper) part of the screen.

Identification							
Decision No	ALA/2005/17241			Former system reference			
Title	Test FA : Nicaragua : strengthening of social centers and family planning services			Geographical Zone	NI-Nicaragua		
EU contribution	20,000,000.00 EUR			Total cost	25,000,000.00 EUR		
Information							
Serial No	Title	Break type	Planned amount (final)	Used amount (final)	Balance	Co-Fi	All?
01	Total cost	CT	25000000			CT	N
02	EU Contribution	UE	20,000,000.00			UE	N

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If you find a mistake in the 'Identification' part, you have to edit the 'General information' tab. If you find a mistake in the Information's budget table, check the amounts of the items in the Analytical Breakdown.

6.4.9.2. Total cost = EU contribution + Other Contributions

For a (level 1) Decision, the total cost (TC, item 01) must always equal the sum of the European Union contribution (EU, item 02) and Other Contributions (AC, item 03).

6.4.9.3. Total of allocable amounts = total of EU contribution

The amount displayed on line 02 - EU contribution is the sum of amounts in sub-levels 02.01, 02.02 etc.

Below the budget table, on the right-hand side, CRIS displays the sum of the allocable items in red (those with a Y in the 'All?' column).

The two totals should be the same.

If the amount of the EU contribution is wrong, check the amounts of the sub-levels of item 02. If the total of the allocable items is wrong, check the Y/N allocation codes.

Example:

Serial No	Title	Break type	Planned amount (final)	Used amount (final)	Balance	Co-Fi	All?
01	Total cost	CT	25000000			CT	N
02	EU Contribution	UE	20,000,000.00			UE	N
02.01	Support actions for social sector	AP	8000000			UE	Y
02.02	Seminar / Conference	SC	10000000			UE	Y
02.03	Technical assistance	AT	2000000			UE	Y
03	Other contributions	AC	5000000			AC	N

Submit Reset UE amount 20000000.00

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6.5. Financial breakdown

6.5.1. Go to the 'Financial breakdown' tab

Click on the tab

Financial breakdown

top ^

to see the Financial Breakdown of the entity concerned (Decision (Level 1), Contract, etc).

This tab displays the links between CRIS and the accounting application ABAC.

In the case of Decisions (level 1) or Contracts - or riders to Decisions or Contracts - it contains information on the corresponding commitment.

6.5.2. Layout of the 'Financial breakdown' tab

6.5.2.1. Financial breakdown for a Decision (level 1)

06/02/2014 16:10:13		Decision (Level 1)																							
Visas	Attached documents	Pipe-line & forecasting	Measure / Project																						
General information		Persons in charge	Analytical breakdown																						
		Riders	Financial breakdown																						
Identification Decision Number ALA/2013/24704 Former system reference																									
Information <table border="1"> <thead> <tr> <th>Commitment ID</th> <th>Budget line</th> <th>Amount</th> <th>DG</th> <th>Policy Area</th> <th>Posting criteria</th> </tr> </thead> <tbody> <tr> <td>SCR_DEC.024704.01.1.B2013</td> <td>BGUE-B2013-19.090100-C1-DEVCO</td> <td>5,400,000.00</td> <td>55</td> <td>RELEX</td> <td></td> </tr> </tbody> </table>				Commitment ID	Budget line	Amount	DG	Policy Area	Posting criteria	SCR_DEC.024704.01.1.B2013	BGUE-B2013-19.090100-C1-DEVCO	5,400,000.00	55	RELEX											
Commitment ID	Budget line	Amount	DG	Policy Area	Posting criteria																				
SCR_DEC.024704.01.1.B2013	BGUE-B2013-19.090100-C1-DEVCO	5,400,000.00	55	RELEX																					
Commitments <table border="1"> <thead> <tr> <th></th> <th>Allocated</th> <th>Contracted</th> <th>Paid</th> <th>RAC</th> <th>RAL</th> </tr> </thead> <tbody> <tr> <td rowspan="3">SCR_DEC.024704.01.1.B2014</td> <td>Waiting for approval</td> <td>0.00</td> <td>3,047.00</td> <td>0.00</td> <td></td> </tr> <tr> <td>Approved</td> <td>5,400,000.00</td> <td>5,165,000.00</td> <td>0.00</td> <td>235,000.00</td> </tr> <tr> <td>Total</td> <td>5,400,000.00</td> <td>5,168,047.00</td> <td>0.00</td> <td>231,953.00</td> </tr> </tbody> </table>					Allocated	Contracted	Paid	RAC	RAL	SCR_DEC.024704.01.1.B2014	Waiting for approval	0.00	3,047.00	0.00		Approved	5,400,000.00	5,165,000.00	0.00	235,000.00	Total	5,400,000.00	5,168,047.00	0.00	231,953.00
	Allocated	Contracted	Paid	RAC	RAL																				
SCR_DEC.024704.01.1.B2014	Waiting for approval	0.00	3,047.00	0.00																					
	Approved	5,400,000.00	5,165,000.00	0.00	235,000.00																				
	Total	5,400,000.00	5,168,047.00	0.00	231,953.00																				

The Financial Breakdown screen for a Decision is divided into four parts: Identification, Information, Commitments and Detail.

Identification

This part of the screen repeats the main data from the 'General Info' page

Information

This part of the screen is a table of the commitment(s) corresponding to the Decision in question. This table contains the following:

- the budget line reference and the type of credits used (C1 ongoing, C8 carryovers, etc.); e.g.: BGUE-B2005-19.080201-C1-DEVCO
- the commitment ID: commitment reference in ABAC: ex: SCR.518618
The format of the ID can vary according to the system in which the commitment was created. e.g. SCRtransaction initiated in CRIS (compulsory since 2003) - Budget_ AIDtransaction initiated in CRIS - EDFSItransaction initiated in Sincom (before migration to CRIS)SI2transaction initiated in Sincom2 (before migration to CRIS) F54transaction initiated in MIS II (before migration to CRIS)
The local ID is a hyperlink which allows you to find further information on the commitment from ABAC (detail, visas, supporting documents...).
- the amount of the commitment: in this case €5.400.000
- DG: reference to the DG that bears the costs and initiates transactions.
- Policy area: policy area of the EC's financing Decision.

Commitments

This shows the use of the commitment(s) in question in summary form: amounts allocated, Contracted, paid, still to be contracted (reste à Contracter - RAC), still to be paid (reste à liquider - RAL).

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6.5.2.2. Financial breakdown of a Contract

04/04/2014 09:39:04 Contract																						
Pipe-line & forecasting		Statistical breakdown		DAC Form		Description		Contractors		Riders		Attached documents		Invoices								
General information			Persons in charge			Visas			Analytical breakdown			Allocations			Financial breakdown			International Organisation				
Identification																						
Contract number				DCI-SANTE/2014/ 337-009				Contracting party				UNITED NATIONS CHILDREN'S FUND										
										Support to Global Polio Eradication Initiative: Response to polio outbreak in the Horn of Africa												
Allocation																						
Decision	Budget line	Commitment Decision	Commitment Contract	Origin year	Amount (EUR)	Program	Posting criteria	DG	Policy Area													
24966	BGUE-B2014-21.025107-C8-DEVCO	SCR.DEC.024966.01.1.B2014	SCR.CTR.337009.01.1.B2014	B2014	4,000,000.00	DCI		55	DEV													
					4,000,000.00																	
Commitments																						
				Contracted (EUR)			Consumed (EUR)			RAL (EUR)												
				Waiting for approval	Approved	Total	Waiting for approval	Approved	Total	Approved	Total											
SCR.CTR.337009.01.1.B2014				0.00	4,000,000.00	4,000,000.00	Inv. Acc.	0.00	3,800,000.00	3,800,000.00												
BGUE-B2014-21.025107-C8-DEVCO							Paid	0.00	3,800,000.00	3,800,000.00	200,000.00	200,000.00										
Prefinancing																						
Commitment				Total pre-financed (EUR)			Cleared pre-financing (EUR)			Balance (EUR)												
				Waiting for approval	Approved	Total	Waiting for approval	Approved	Total	Approved	Total											
SCR.CTR.337009.01.1.B2014				0.00	3,800,000.00	3,800,000.00	0.00	0.00	0.00	3,800,000.00	3,800,000.00											
Prefinancing in currency (Details)																						
Commitment	Legal Entity (LEF)	Pre-Financing Reference	Currency	Total pre-financed	Cleared pre-financing	Correction type	Balance	Balance after correction														
SCR.CTR.337009.01.1.B2014	6000055643	SCR.4791248.1.B2014	EUR	3,800,000.00	0.00		3,800,000.00	3,800,000.00														

Identification

This part of the screen repeats the main data from the 'General Info' page.

Allocation

This part of the screen shows some of the information from the level 1 commitment made for the Decision on the basis of which you are requesting a level 2 commitment for the Contract.

The following elements of the level 1 commitment are displayed automatically:

- budget line reference-local ID: level 1 commitment reference in ABAC-Program: filled out automatically-Posting criteria (mandatory for Budget contracts when an administrative budget line is used and for all EDF contracts) DG Policy area
The local ID is a hyperlink which allows you to find further information on this commitment from ABAC (detail, visas, supporting documents, etc.).

Commitments

This shows the use of the commitment(s) in question in summary form:

Amounts Contracted, Consumed, RAL: Balance (reste à liquider).

'Pre-financing'

This part of the screen shows the detail of any pre-financing paid or cleared and the balance, as reported in ABAC.

6.5.3 Filling in the Financial Breakdown

In the 'General info' tab you have already indicated which commitment type you have chosen for this Decision/Contract, but you still have to indicate the amount and the budget line to be used for the commitment.

When you create a new Decision the commitment list will be empty by default.

You therefore need to enter a line in the Financial Breakdown table by filling in the 'Detail' part of the screen.

e.g.:

The screenshot displays the 'Decision (Level 1)' interface. The 'Financial breakdown' tab is active, showing a table with columns: Commitment ID, Budget line, Amount, DG, Policy Area, and Posting criteria. Below the table are buttons for 'New', 'Modify', and 'Delete'. The 'Detail' section is expanded, showing the following fields:

Serial No	1	Commitment ID	
Budget line	<input type="text"/>	Amount	0
Posting criteria	<input type="text"/>	Available	0.00
Credit	0.00	Policy Area	
DG			
Title	<input type="text"/>		

The 'Latest update' section shows:

Login	GRAEVFR	Date	04-06-09
-------	---------	------	----------

A 'Submit' button is located at the bottom of the form.

You have to fill in the following information:

- **Budget line:**
 - A. for Budget Decisions: to select a budget line, enter its reference or part of its reference. Then double-click in the yellow field and choose the line you want from the list.
 - e.g.: To select budget line BGUE-B2009-19.080201-C1-DEVCO- enter '19.08' - double-click in the yellow field to get the full list of budget lines beginning with BGUE-B2009-19.08... - click on the line you want to select: e.g. B2009 for year 2009 appropriations C1 for credits of the ongoing year
 - B. For EDF Decisions: double-click in the yellow field. You will get a restricted choice based on the EDF no. inserted in the IN 000 rider

and on the Financing Country of the Analytical Breakdown. If you wish, you can restrict this list further by entering part of the budget line. For instance: enter "02.10.21" and double-click in the field. You will get only the budget lines for the EDF inserted in the IN 000 rider and financed by the country (or region) specified in the Analytical Breakdown.

- **Amount:** Enter the amount to be committed from the selected budget line
 - **Posting criteria:** for the Budget: to be filled in ***only*** if you use administrative budget lines. For EDF Decisions, this field must always be filled in.
 - **Credit:** amount available on this budget line for this year. This field will be filled in once you click on 'Submit'.
 - **Available:** amount available on the selected budget line when you enter the data. This field will be filled in automatically as soon as you submit the information. If the remaining balance is not sufficient you will not be able to make this commitment.
 - **DG:** reference to the DG that bears the costs and initiates transactions.
 - e.g.:55: EuropeAid Co-operation Office
 - **Policy area:** policy area of the EC's financing Decision.
e.g.:DEV: * Development and relations with African, Caribbean and Pacific (ACP)*
 - States (under 21.XX budget lines)*
 - **Title:** leave blank
- Then click on **Submit**.
- A line appears in the 'Information' part of the screen. However the commitment number cannot yet be seen because the Financial Verifying Agent (RESPFIN) still needs to give his/her visa to generate a commitment request in ABAC.

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6.5.4 Adding a new line in the Financial Breakdown

Sometimes you may have several commitments for one Decision, in which case the table contains one line for each commitment. To enter a second commitment on the same entity, click on 'New' in the 'Detail' part of the screen. Fill in the information as explained above. When you click on 'Submit' CRIS adds a second line in the 'Information' table containing the information on the second commitment. Similarly an amount can be allocated against several commitments in a Contract's Financial Breakdown. See the manual on Contracts for information on this (CRIS, Help / General documents).

6.5.5 Modifying an existing line in the Financial Breakdown

This is only possible if the visa has not yet been given. Select the line to be modified with the radio button on the left-hand side: the lower part of the screen shows the present state of the commitment / payment. Click on 'Modify' and enter the appropriate changes. Submit.

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6.5.6 Financial Breakdown before the Financial Verifying Agent's visa

The commitment reference does not yet exist and there is no summary of the use of the commitment.

04/04/2014 10:03:00 Decision (Level 1)

Visas Attached documents Pipe-line & forecasting Measure / Project External Monitoring / Evaluation / Audit Contracts

General information Persons in charge Analytical breakdown Riders **Financial breakdown**

Identification

Decision Number DCI-ASIE/2011/22206 Former system reference

Information

	Commitment ID	Budget line	Amount	DG	Policy Area	Posting criteria
<input checked="" type="radio"/>		BGUE-B2014-21.030102-C1-DEVCO/ELARG	100.00	69	DEV	

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6.5.7 Financial Breakdown after the Financial Verifying Agent's visa

After the Financial Verifying Agent's visa, the commitment request has been generated and you see the transaction's ABAC reference:

The screenshot shows the 'Decision (Level 1)' interface with the 'Financial breakdown' tab selected. The 'Identification' section displays decision details, and the 'Information' section contains a table with a highlighted 'Global commitment' value.

Budget line	Global commitment	Planned amount (final)	DG	Policy Area
BGUE-B2005-22.010406-C1-ELARG	SCR 533882.1 B2005	5,000,000.00	SS	RELEX

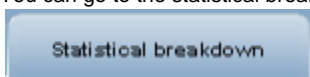
		Allocated	Contracted	Paid	RAC	RAL
SCR.533882.1.B2005	Waiting for approval	0.00	19,378.00	0.00		
	Approved	5,000,000.00	0.00	0.00	5,000,000.00	5,000,000.00
	Total	5,000,000.00	19,378.00	0.00	4,980,622.00	5,000,000.00

The transaction number (in blue) is a hyperlink to the commitment screen. By clicking on it you can see the detail of the transaction. CRIS also shows the use of the commitment in summary form.

6.6. Statistical breakdown

6.6.1. Go to the 'Statistical Breakdown'

The Statistical Breakdown tab aims at establishing statistics for the Commission's internal purposes. You can go to the statistical breakdown by clicking on the



page of the entity concerned (Measures/Projects or Contracts). On this page you can break down the amount by statistical code, amount, percentage or quantity.

6.6.2. Layout of the 'Statistical Breakdown' page

You can select the category of statistics you need from the dropdown list (1).

The breakdown criteria are as follows:

- sector (OECD/DAC ¹ code)
- geographical zone
- theme
- target group
- method
- partner

You can find the list of the codes on the 'Information' page (2). Several codes can be selected if required.

The lower part of the screen (3) shows action buttons and the detail of the line selected by the radio button in the Information list.

6.6.3. Selecting the sector code(s)

6.6.3.1 Background and support

In order to establish statistics for internal needs and for the OECD, at least one sector code must be indicated in this section. For further explanations on DAC sector coding, please contact the AIDCO DACSTAT functional mailbox.

6.6.3.2. Sector profiling for Measures/Projects

1. Select 'Sector Profiling' in the dropdown menu under the 'Information' part.

2. Click on 'New' in the lower part of the screen and fill in the fields available.

Detail

Breakdown code 15066 - Land mine clearance

% Allocated

Primary code ?

- Breakdown code: the list of DAC sector codes is available by double-clicking in the yellow field or clicking on the



help icon. The list can be sorted according to the 'codes' or 'titles' of the columns.

A project is linked to a strategy paper through the GENERAL INFORMATION of the project. One or several sector codes have been identified in the strategy paper.

30/05/2005 10:54:55 **Measure / Project**

General information | Persons in charge | Statistical breakdown | DAC Form | Implementation report | Attached documents | Decision (Level 1) | Contracts

New | Key search | Advanced search | Print

Identification

Decision No: ASIE / 2004 / 16945 | Project seq. No: 0

Information

Breakdown No: | Geographical Zone: LK
 Status: EC - Ongoing | EU contribution: 1,999,976.00
 OLAS Decision reference (EDF): | Delegation in charge: IN - IN
 Project Title: EC Assistance to UNDP's Mine Action Support in Sri Lanka

CSP/NIP links

	Strategy Paper reference	Title	Amount	Ref. EDF financial global commitment
1	LK - 0 - 3	Post-conflict assistance		

In the 'Breakdown code' field of the statistical breakdown, you can refer to one or several of the sector codes identified in the strategy paper.

- % Allocated: to indicate the percentage of the project's budget that covers the selected sector. A value must be inserted. The sum of all values must be equal to 100.
- Primary code: to be checked if the selected code corresponds to the main sector.

3. Submit

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6.6.3.3. DAC sector code for a Contract

There are two ways to identify DAC sector codes in the statistical breakdown for Contracts:

- implementation Contracts: selecting a DAC sector code at Contract level is optional if the Contract is linked to a project for which a DAC sector code has been identified;
- grants and Contracts with an 'EN' commitment type (no link to a Decision): a DAC sector code MUST be indicated on the statistical breakdown page. An ENCCAD visa step confirms the identification of a sector code.

1. Select a DAC sector code in the dropdown list under 'Information'.

30/05/2005 13:47:44 **Contract**

Pipe-line & forecasting | Description | Riders | External Monitoring / Evaluation / Audit | Standard documents | Attached documents | Invoices

General information | Persons in charge | Visas | Analytical breakdown | Allocations | Financial breakdown | Statistical breakdown

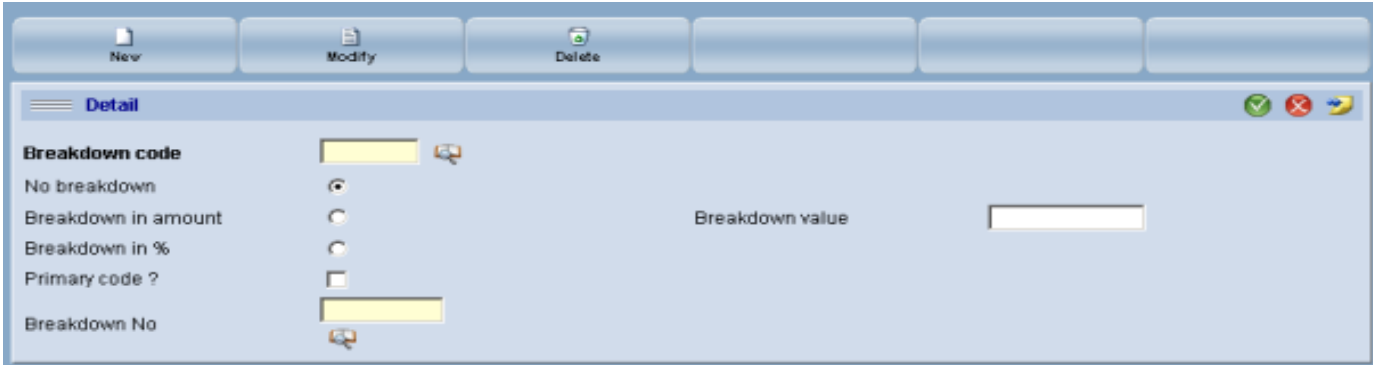
Identification

Contract number: DDH/2004/ 081-463 | Contracting party: Awaz Foundation Pakistan
 Title: Women rights & emancipation program
 Planned amount: 42,053.00 EUR | Contract type: SV - Grant

Information

DAC Sector Code	Title	Breakdown Value	Primary code ?	Breakdown No
-----------------	-------	-----------------	----------------	--------------

2. Click on 'New' in the lower part of the screen and fill in the available fields.



The screenshot shows a software window titled 'Detail'. At the top, there are buttons for 'New', 'Modify', and 'Delete'. Below these, the 'Detail' section contains several fields and options:

- Breakdown code:** A yellow text input field with a help icon to its right.
- No breakdown:** A radio button.
- Breakdown in amount:** A radio button.
- Breakdown in %:** A radio button.
- Primary code ?** A checkbox.
- Breakdown No:** A yellow text input field with a help icon to its right.
- Breakdown value:** A text input field.

Breakdown code: you can access the list of DAC codes by double-clicking on the yellow field or clicking on the



help button.

- There is no link with a strategy paper at the level of the Contract. Any sector may be selected.
- No breakdown: check this button if there is only one sector.
- Breakdown in amount: this allows you to enter the amount (in the 'Breakdown value' field) of the Contract budget to be spent in the specified sector. If you have more than one sector, you indicate the amount for each. The total of the breakdown values per sector must be equal to the EU contribution to the Contract.
- Breakdown in %: this allows you to indicate in the 'Breakdown value' field the percentage of the Contract amount to be spent in the sector concerned. The total of the breakdown values must be 100.
- Primary code: check this button to indicate that the sector concerned is the main code.
- Breakdown No: allows you to link an allocable heading in the Analytical Breakdown to the sector code concerned. This is not often used.

6.7 Description

You can view and edit the descriptive data relating to the entity in question by means of the tab:



11/02/2014 12:56:43 **Contract**

General information | Persons in charge | Visas | Analytical breakdown | Allocations | Financial breakdown
 Pipe-line & forecasting | Statistical breakdown | DAC Form | **Description** | Contractors | Riders | Attached documents | Invoices | Retentions

Identification

Contract number: DCI-ALA/2011/ 271-749 Contracting party: ACE INTERNATIONAL CONSULTANTS SL
 Contract title: Asistencia Técnica: Programa de fortalecimiento de la competitividad de las Pymes y creación de empelo en Argentina
 Planned amount: 1,099,148.00 EUR Contract type: ME - Implementation

Modify

Information

2. Origin, context and key assessments (+) ▾

Detailed description

La Asistencia Técnica pondrá a disposición del proyecto "Programa de fortalecimiento de la competitividad de las PYMES y creación de empelo en Argentina" expertos para fortalecer la competitividad de las Pymes a través del uso de la nanotecnología en los 4 sectores industriales que definió el proyecto: Metalmeccánica, Agroalimentos, Salud y Electrónica.

Here you can see the objectives, expected results and resources implemented for each entity. To go to the Information zone, click on the "Modify" button. Do not forget to Submit to save your modifications.

6.8 Riders

To access the riders, use this tab

Riders

06/02/2014 16:27:52 **Contract rider**

General information | Persons in charge | Visas | Analytical breakdown | Allocations | Financial breakdown
 Pipe-line & forecasting | Statistical breakdown | DAC Form | Description | Contractors | **Riders** | Attached documents | Invoices

Identification

Contract number: FED/2013/ 306-958 Former reference: Support to the implementation of the 'Monitoring of Environment and Security in Africa (MESA)'
 Contract title: JRC CCR JOINT RESEARCH CENTRE - CENTRE COMMUN DE RECHERCHE
 Contracting party: ME - Implementation Planned amount: 1,500,000.00 EUR

New

Information

Serial number	Workflow type	Value date	Contract / Rider title	Coordinator (LEF)	Bank Account Ref. (BAF)	Amount	Implementation duration	Implementation starting date	Status
000	IN (000)	13/02/2013	Support to the implementation of the 'Monitoring of Environment and Security in Africa (MESA)'	6999999009	0002179712	1,500,000.00	48 M	04/02/2013	Final 99/GESTITF/AC
001	AB	24/05/2013	Instruction of DGBUDG to pay via DEVCO account			0.00	M		Cancelled 30/GESTFIN/CC
002	AB	27/01/2014	ABAC 6.9 migration			0.00	M		Final 99/GESTITF/AC

Before you can draw up a rider for an entity, the previous version must first have been given its final visa (status = Final) or have been cancelled. Each line, except 000 which refers to the original version, corresponds to an amended version of the entity in question. To create a new version, click on the "New" button.

Information		
Serial Nr	Decision (Level 1)	Decision (Level 1) rider
Workflow type		003
Decision title		AV
Rider title		Support to Namibian Water Supply and Sanitation Sector Programme (NAWASA) Click to edit title
Total cost	34,900,000.00	
EU contribution (*)	34,900,000.00	
Miscellaneous notes		
Procedure		
Vista reference		

Accounting info		
EDF N°		
Commitment affected by rider		NEW COMMITMENT
Commitment type (*)		
Budget Management Type (*)		
Implemented by (*)		
Expenditure category		
Budget management before 2014		
Historical budget management type (*)	CD	
Legal justification (*)		
Treaty Reference (*)		

Payment class (*)	
Justification Payment Class (*)	

Follow-up (*) fields transferred to ABAC		
Date of presentation to the Committee		
Commission Decision date		
Financing Agreement Reference (FA ref.) (*)		
Final Date for Concluding the FA (FDC FA) (*)		
Apply D+3 rule (*)		<input checked="" type="checkbox"/>
Exception D+3 rule (*)		
Final Date for implementing FA (FDI FA)		
Final date for implementation (FDI) (*)	11/01/2014	
Duration of contracting period of FA (in month) (DCP FA) (*)		
Reason for updating expired FDI (*)		
FDI Delimiter (*)		
End of period of execution (DLE)	11/01/2019	
End date of operational implementation period (LMO=EOI)	11/01/2017	

The rider itself is divided into different sections where you can insert changes to the previous version.

To open a rider, click on the 'Rider' tab, then on the hyperlink of the serial number associated with it. CRIS will display the 'General info' tab of the 'Contract rider' page. In the 'Information' framework, the data are displayed in two 'columns': on the left you can see the data from the original version, on the right are displayed the fields which can be modified.

If the original value in a field is numerical (amount or duration), enter the **difference** on the right-hand side, if necessary preceded by a minus sign. You introduce changes from the previous version in the Analytical Breakdown, Allocations and Financial Breakdowns, remembering to specify the **differences** in the numerical fields, not the new total values.

There are different types of riders:

1. **AV:** Rider

A rider that needs to be signed by the different parties, i.e. supported by an official document.

2. **AB:** Budget adjustment

Rider used to correct data that needs to be sent to ABAC but that does not need to be signed by the parties of the commitment.

3. **CA:** Cancellation

Cancellation means no further action on the corresponding entity and automatic de-commitment of the balance in ABAC.

4. **CL:** Closure

This closes the entity and de-commits any balance.

5. **CO:** Correction

To correct data that is only visible in CRIS and that is not sent to ABAC.

6. **IN:** Initial

This is not a real rider but the **original** version of the Decision or Contract.

7. **OM:** Operational modifications concerning the PAR information

The OM (Operational Modification) rider allows the user to make only the specific operational modifications concerning the PAR (Potential Abnormal RAL) information for contracts under the General Budget. (For more details on the PAR, please refer to [Chapter 25](#) of the Contracts Manual.)

6.9. Attached documents




The "Attached documents" tab allows you to attach one or more documents to the entity in question.

Any user can attach documents, as long as they have permissions for the respective CRIS module, and taking into account the applicable circuit (if any).

TIP  **How to convert documents to PDF format?**

There are several ways of obtaining a PDF document from another file type.

- If you need to attach a document with the file extension .doc, .xls, .jpg, .ppt, .rtf, .txt, .zip you can simply send the document(s) to the functional mailbox [EC PDF CODE WEB](#). A few minutes later, you will receive the document(s) converted into PDF format.
 - If you need to attach a SIGNED document that was previously scanned: send the document to the functional mailbox [EC OCR CODE PDF](#). The OCR (Optical Character Recognition) mailbox converts your scanned document into a PDF file where you can perform searches on and where you can copy the text. Using this functionality allows you to easily browse through a scanned document using the common Acrobat Reader functions.
- You can find more information on OCR and PDF on [DEVCO's intranet page](#)

06/02/2014 16:34:24 Contract   

General information Persons in charge Visas Analytical breakdown Allocations Financial breakdown

Pipe-line & forecasting Statistical breakdown DAC Form Description Contractors Riders **Attached documents** Invoices

Identification

Contract number	FED/2011/ 266-730	Contracting party	REPUBLIC OF NAMIBIA
Contract title	NAWASA Budget Support	Contract type	ME - Implementation
Planned amount	33,400,000.00 EUR		

List of documents

	Rider Nr	Automatic	Mandatory	Document title	Language	Document type	Date of update
<input checked="" type="radio"/>	0			1 ✓ 2nd Budget Support Payment	EN		07/06/2013
<input type="radio"/>	0			2 ✓ Rider Budget Support to NAWASA	EN	VN	14/06/2013

Information

Serial Nr	1	Title?	<input type="checkbox"/>
Document title	2nd Budget Support Payment	Document type	
Language	EN - English	Extension code	PDF - Acrobat document
Document source	CRIS		


Latest update




Login	URIKOFL	Date of update	07/06/2013 13:06:34
-------	---------	----------------	---------------------

Actions:

To add a document to the list:

1. Click on "New" in the lower part of the screen

Information 

Serial Nr	<input type="text" value="3"/>	Title?	<input type="checkbox"/>
Document title	<input type="text" value="Strategy"/>		
Language	<input type="text" value="EN"/> 	Document type	<input type="text" value="CSP"/> 
Document source	<input type="text" value="CRIS"/>	Extension code	<input type="text" value="JXT"/> 

2. You can specify a **serial number**. This allows you to structure your Attached Documents in a logical way. For instance, if you enter '01' as the serial number, you can also create 'sub-levels' by entering '0101' for a different document. CRIS will automatically structure your attached documents as follows.

List of documents				
	Rider Nr	Automatic	Mandatory	
<input checked="" type="radio"/>	0	✓		01 ✗ DEC - Programme d'Action Annuel
<input type="radio"/>	0	✓		01 ✓ DEC - Programme d'Action Annuel
<input type="radio"/>	0			01..0.1 ✗ DEC - document
<input type="radio"/>	0	✓	IO	02 ✗ DEC - Action Document (Formulation)
<input type="radio"/>	0	✓	IO	02 ✗ DEC - Action Document (Formulation)
<input type="radio"/>	0			03 ✗ Checklist

3. You must enter the **document title**.

4. Indicate its **extension code** (.doc, .pdf, .xls, .html, etc.) so that CRIS knows which application to run to view the document (Word, Acrobat Reader, Excel, etc.).

5. **'Title?'** is used to create a breakdown in the list of documents. If checked, it means that the line you are creating will be the title of a list of documents.

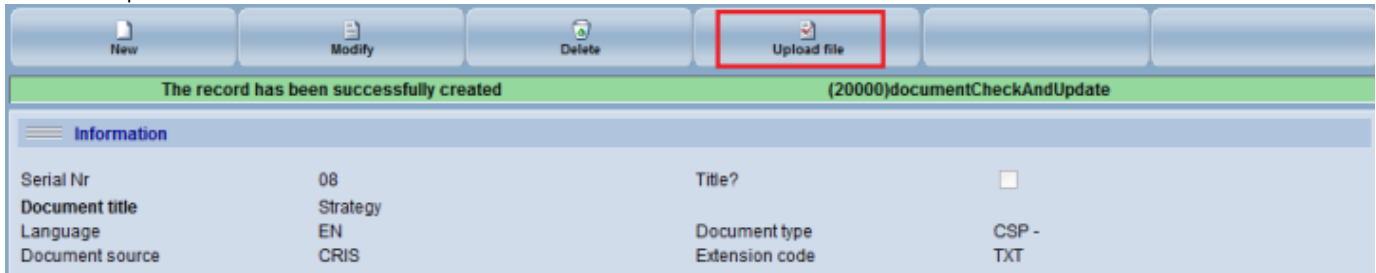
6. You can specify the **document type** in the "document type" field. **Please note that for mandatory documents (TORs in request of services or Action Fiche in the decision CRIS checks the document type. Make sure to have selected the proper document type (for example for TORs of a request for services the document type is TR).**

7. Submit

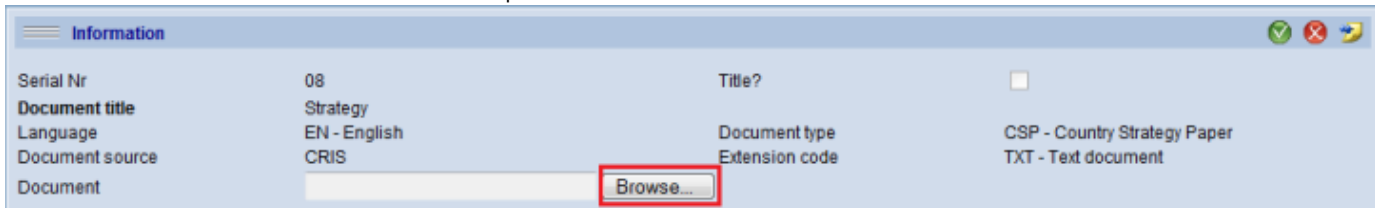
This process creates space for the document in the database.

To link the actual document to the line in CRIS:

1. Click on "Upload file"



2. Use the "Browse" button to select the document required.



3. Click on "Submit" to upload a copy of the document in the database.

The document title becomes a hyperlink allowing you to open the document in read-only mode.

The document can then be viewed by all CRIS users. CRIS does not allow the document to be directly edited. If a new version needs to be attached to CRIS, simply replace the old version in CRIS with the new document by clicking on Upload file.

Please refer to **Ares instruction note 269613 (08/10/2009)** to see which documents should be attached in CRIS.

6.10. Relation between different entities

In CRIS, the relation between different documents is usually quite visible.

In a Decision, for instance, we can find the Contracts linked to it by going to the Contracts tab of the Decision.

07/02/2014 09:16:42 **Decision (Level 1)**

General information | Persons in charge | Analytical breakdown | Riders | Financial breakdown
 Visas | Attached documents | Pipe-line & forecasting | Measure / Project | External Monitoring / Evaluation / Audit | **Contracts**

Identification

Decision Number: FED/2013/21982
 Title: Trinidad and Tobago - Environment Programme
 EU contribution: 8,000,000.00 EUR
 Former system reference: Zone benefiting from the action
 Total cost: 8,000,000.00 EUR
 TT-Trinidad and Tobago

Financial synthesis

Decision (Level 1)	Allocated	Contracted	Paid	RAC	RAL
Under preparation	0.00	2,499.00	0.00	-	-
Waiting for approval	0.00	0.00	0.00	-	-
Approved	8,000,000.00	7,100,000.00	2,130,000.00	900,000.00	5,870,000.00
Total	8,000,000.00	7,102,499.00	2,130,000.00	897,501.00	5,870,000.00

List of contracts

Contract	Status	Title Contracting party	Nature	Contractor's signature date	End date of activities	Currency	Amount (EUR)	Paid (EUR)	Balance (EUR)	Under preparation
FED/2013/323-139	EC	Environment Programme for Trinidad and Tobago REPUBLIC OF TRINIDAD AND TOBAGO	PF	09/08/2013	08/05/2018	EUR	7,100,000.00	2,130,000.00	4,970,000.00	0.00
FED/2014/337-351	DE	Provision of logistical support for Media Events SUSTAINABLE LIVING T&T LBG	SER			EUR	0.00	0.00	0.00	2,499.00

Linked contracts not allocated

Contract	Status	Title Contracting party	Nature	Contractor's signature date	End date of activities	Currency	Amount (EUR)	Paid (EUR)	Balance (EUR)	Under preparation
FED/2013/334-796	CA	Provision of logistical support for Media Events SUSTAINABLE LIVING T&T LBG	SER			EUR				

At the level of the Contract, we can view all the related Invoices, Recovery Orders, Financial Guarantees and Forecasts of Revenue as they come from ABAC, by clicking on the "Contract card" option.

05/04/2016 14:38:58 **Contract (Implementation)**

Pipe-line & forecasting | Statistical breakdown | DAC Form | Description | Contractors | Payment | Riders | External Monitoring / Evaluation / Audit | Attached documents

General information | Persons in charge | Visas | Analytical breakdown | Allocations | Financial breakdown | International Organisation

New (budget) | New (EDF) | Modify | Key search | Advanced search | **Contract Card**



Contract Card

Year	SCR.DEC	SCR.CTR	BGUE	23,000,000.00	0.00	23,000,000.00	0.00	-3,000,000.00	20,000,000.00
2012	SCR.DEC.019974.01.1	SCR.CTR.283007.01.1	BGUE-B2012-19.100101-C8-DEVCO	23,000,000.00	0.00	23,000,000.00	0.00	-3,000,000.00	20,000,000.00
2012	SCR.DEC.021581.01.1	SCR.CTR.283007.01.2	BGUE-B2012-19.100101-C8-DEVCO	17,000,000.00	0.00	17,000,000.00	0.00	0.00	17,000,000.00
2013	SCR.DEC.019974.01.1	SCR.CTR.283007.01.1	BGUE-B2013-19.100101-C8-DEVCO	0.00	0.00	0.00	0.00	-2,418,360.85	17,581,639.15
2013	SCR.DEC.021581.01.1	SCR.CTR.283007.01.2	BGUE-B2013-19.100101-C8-DEVCO	0.00	0.00	0.00	0.00	-2,000,000.00	15,000,000.00
2014	SCR.DEC.019974.01.1	SCR.CTR.283007.01.1	BGUE-B2014-21.025103-C8-DEVCO	0.00	0.00	0.00	0.00	-8,808,310.91	10,775,328.24
2014	SCR.DEC.021581.01.1	SCR.CTR.283007.01.2	BGUE-B2014-21.025103-C8-DEVCO	0.00	0.00	0.00	0.00	-975,366.97	14,024,633.03
2015	SCR.DEC.019974.01.1	SCR.CTR.283007.01.1	BGUE-B2015-21.025103-C8-DEVCO	0.00	0.00	0.00	0.00	-8,788,874.30	1,988,463.94
2015	SCR.DEC.021581.01.1	SCR.CTR.283007.01.2	BGUE-B2015-21.025103-C8-DEVCO	0.00	0.00	0.00	0.00	0.00	14,024,633.03
2016	SCR.DEC.019974.01.1	SCR.CTR.283007.01.1	BGUE-B2016-21.025103-C8-DEVCO	0.00	0.00	0.00	0.00	-1,988,463.94	0.00
2016	SCR.DEC.021581.01.1	SCR.CTR.283007.01.2	BGUE-B2016-21.025103-C8-DEVCO	0.00	0.00	0.00	0.00	-2,063,530.19	11,961,102.84

Guarantees										
Gua Local Key	Gua Type	Gua State Desc	Gua Validity Start Date	Gua Validity End Date	Gua Currency	Gua Amount (Eur/Cur)	Gua Released Amount (Eur/Cur)	Gua Claimed Amount (Eur/Cur)	Gua Available Amount (Eur/Cur)	Link to CRIS
						5,000,000.00			5,000,000.00	
SCR.GAR.073541	PRF - Pre-Financing	Received	27/09/2012	28/06/2018	EUR	3,000,000.00			3,000,000.00	LINK
SCR.GAR.075222	PRF - Pre-Financing	Received	26/08/2013	28/06/2018	EUR	2,000,000.00			2,000,000.00	LINK

Invoices												
REGULAR INVOICES (FAC)												
Invoice Local Key	Invoice Type Code	Status	Invoice EC Reception Date	Invoice Due Date	Invoice Overdue Days	Ongoing Suspension	Invoice Complete	Inv Gross Amount (EUR)	Inv Not Elig. (+CM) Amount	Inv Clearing Amount (EUR)	Inv Paid Amount (EUR)	Link to ABAC
								23,038,897.16	0.00	-23,036,963.93	1,933.23	
SCR.2013.028902	CC - Cost Claim	FIN/100	21/10/2013	20/12/2013	-44	N	Y	2,418,360.85	0.00	-2,418,360.85	0.00	LINK
SCR.2014.010144	CC - Cost Claim	FIN/100	17/04/2014	16/06/2014	-48	N	Y	3,804,377.68	0.00	-3,804,377.68	0.00	LINK
SCR.2014.025250	CC - Cost Claim	FIN/100	04/09/2014	23/11/2014	-53	N	Y	3,975,366.97	0.00	-3,975,366.97	0.00	LINK
SCR.2014.035256	CC - Cost Claim	FIN/100	10/12/2014	24/01/2015	-38	N	Y	1,933.23	0.00	0.00	1,933.23	LINK

In a Call for Proposal that has been evaluated completely in CRIS, we can access the contracts resulting from this Call by going to the List of Applications tab of the Evaluation. We need to select the last phase of the evaluation in the drop-down and click on Search. Next to the proposals that were accepted, we can see the reference (hyperlink) of the Contract.

04/06/2009 15:14:17 Call for tender / Call for proposal Evaluation

General Information Calendar Persons in charge Steps / Evaluation Criteria Visas **List of applications** Attached documents Call for Tenders / Call for Proposals

Evaluation procedure

Call reference ENPI/127726 - Local and regional cultural activities 2009 - Israel
 Lot number / phase 1 (0) - Local cultural activities
 Publication date 14/11/2008 Deadline for submission 23/01/2009

New application

Information

Search Clear search 5. Eligibility

N°	Applicant	Valid	Delegation in charge		Contract number
2	SCRA032183	✓	Israel	Accepted	
3	6000149690	✓	Israel	Accepted	ENPI/2009/200-293
4	6000151378	✓	Israel	Reservable	
7	6000151218	✓	Israel	Accepted	ENPI/2009/200-308
15	6000154672	✓	Israel	Reservable	
20	6000150726	✓	Israel	Accepted	ENPI/2009/200-345
21	SCRA032015	✓	Israel	Reservable	
27	6000152130	✓	Israel	Accepted	ENPI/2009/200-426
30	SCRA031902	✓	Israel	Reservable	
35	SCRA032395	✓	Israel	Accepted	ENPI/2009/200-498
41	6000150748	✓	Israel	Accepted	ENPI/2009/202-522
42	SCR1658817	✓	Israel	Reservable	

¹ DAC: OECD Development Assistance Committee
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Related pages

[Chapter 5: How to create or modify data](#)
[Chapter 7: Structure of the CRIS system](#)
[All chapters](#)

GNR - chapter 7



Version française de cette page



Chapter 7: Structure of the CRIS system

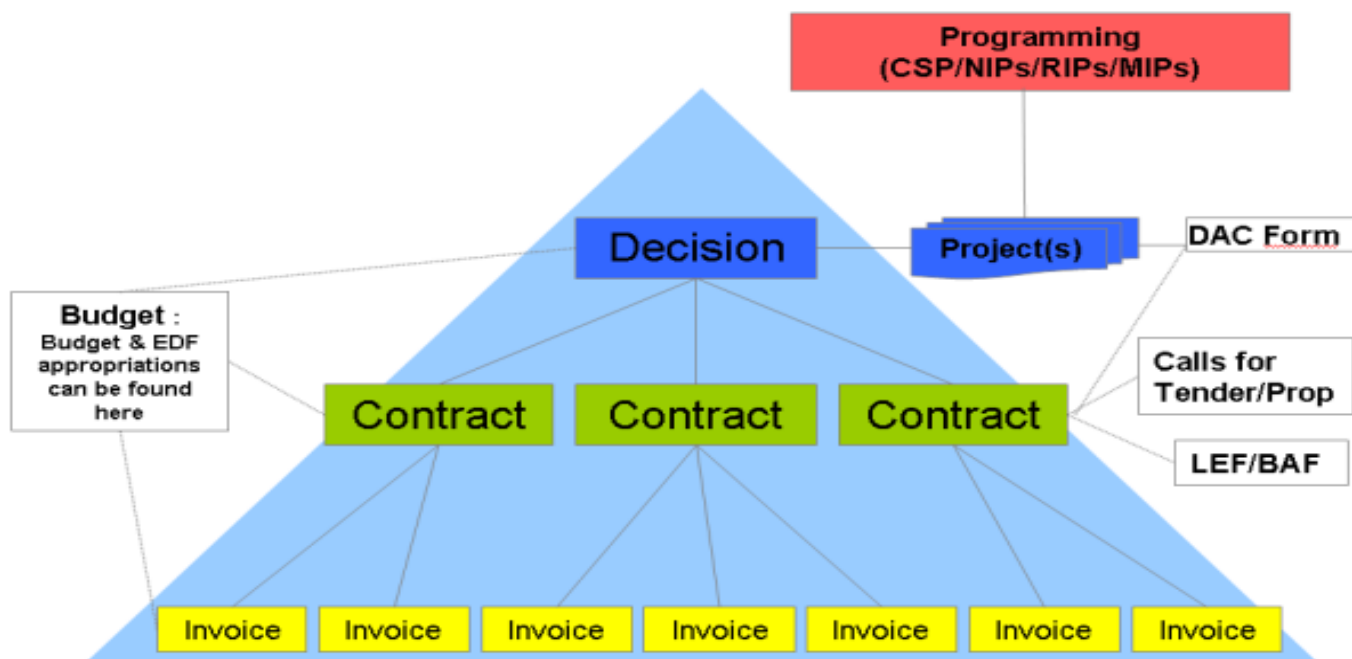
Content

- 7. Structure of the CRIS system
 - 7.1 Hierarchy between modules: vertical modules
 - 7.2 Horizontal Modules
 - 7.3 Links between levels
 - 7.3.1 Analytical Breakdown and Allocations
 - 7.3.2 Financial Breakdown

7. Structure of the CRIS system

7.1. Hierarchy between modules: vertical modules

CRIS has a pyramid structure. This can be summarized as in the figure below:



- **Programming:** At the top of the hierarchy are Country Strategy Papers (CSP). These identify priority sectors for a specific geographical zone (country or region) for a fixed period of time. A strategy is thus devised in terms of objectives. Projects must be based on these objectives.
 - **Project:** The Project module is linked to the Decisions module because a Project has to be validated by a management Decision. A Decision can cover more than one Project.
 - **Decision:** In CRIS the Decision is actually the top level element. Projects and Measures have to be implemented within the framework of the Decision.
 - **Contract:** A Decision is implemented through one or more Contracts. There are different types of Contracts: grant contracts, implementation contracts, framework contracts, etc.
 - **Invoices:** The lowest level is the payment. All the financial transactions (Pre-financing, commercial Invoice, recovery order, etc.) are created in ABAC and linked to a valid CRIS Contract.
- All the above modules (Programming, Projects, Decisions, and Contracts) are called 'vertical' modules.

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7.2. Horizontal Modules

Some CRIS modules provide functions that fall outside the pyramid structure explained in section 7.1. These are the horizontal modules. Some examples:

- **The Budget module** contains links with ABAC and gives you access to information in ABAC concerning budget lines, commitments, legal entities or transactions processed in the accounting system.
- **The LEF/BAF ¹ module** displays administrative data on participants in the project life cycle. The operator module provides administrative data about Contractors: references, addresses, contact people, etc.
- **The Call for Tender/Proposal module** is for publishing and evaluating calls for tender and calls for proposals in indirect management.
- **The Framework Contract module** offers a simplified procedure allowing you to issue a request for services to pre-selected firms, evaluate their bids and initiate a specific Contract.

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7.3. Links between levels

7.3.1. Analytical Breakdown and Allocations

Items in the budget breakdown at one level (e.g.: a Contract) can be linked to items in the budget breakdown at another level (Decision or Contract).

One condition: In the Analytical Breakdown these headings must be 'allocable': i.e. have a 'Y' in the **All?** column.

07/02/2014 09:39:12 Contract

Pipe-line & forecasting Description Contractors Riders Attached documents Evaluation of the offer/offers Invoices Retentions

General information Persons in charge Visas Analytical breakdown Allocations Audits Financial breakdown Statistical breakdown DAC Form

Identification

Contract number ASIE/2013/ 288-893 Contracting party MOORE STEPHENS LLP
 Contract title Complementary Verification mission on Implementing the National Strategic Plan for Avian Influenza (INSP-AI)
 Planned amount 36,049.00 EUR Contract type LM - Specific contract (framework contract)

Information

Serial Nr	Title	Break type	Planned amount (final) (EUR)	Used amount (final) (EUR)	Balance (EUR)	Inv. Overrun %	All?
01	Honoraires	HN	28,685.00	0.00	28,685.00	0	Y
02	Per Diem	PD	2,864.00	0.00	2,864.00	0	Y
03	Remboursables	RM	4,500.00	0.00	4,500.00	0	Y
03.01	Voyages	VO	4,500.00			0	N
03.02	Transports	TR	0.00			0	N
03.03	Personnel d'Appui	PN	0.00			0	N
03.04	Autres	AU	0.00			0	N

Prefinancing EUR EUR

Detail

Serial Nr 01 Allocable ? Co-financing type UE - EU contribution
 Break type HN - Fees Title Honoraires
 Mailing Entity Reference (Acronym)

Planned amount (in workflow)	Planned amount (final)	Used amount (in workflow)	Used amount (final)	Balance
0.00	28,685.00	0.00	0.00	28,685.00

The link is actually created via the 'Allocations' tab of the lower-level entity (i.e. in the "Allocations" tab of contracts for the analytical breakdown of the respective decision).

7.3.2. Financial Breakdown

When a Decision is validated in ABAC, it generates a global commitment on one or more budget lines in the accounting system. This is a budget reservation to cover the global Decision concerned. The specific terminology for the global commitment is 'Level 1 commitment'.

When a Contract is created under the Decision, it generates a specific commitment using budget from the Level 1 commitment. The right terminology for an individual commitment is 'Level 2 commitment'. So the Level 2 commitment consumes the funds of the Level 1 commitment.

When an Invoice is created under the Contract in ABAC, the payment transaction uses budget from the Level 2 commitment. Hence the payment consumes the funds of the Level 2 commitment.

The link between payment, Level 2 and Level 1 commitment and budget lines is made in the Financial Breakdown.

In the example below Contract 271749 is under Decision 21953. At the level of the Contract there is a Level 2 commitment [SCR.CTR.271749.01.1.B2011](#). This commitment uses an amount of € 1,099,149 from the budget of the Level 1 commitment [SCR.DEC.021953.01.1.B2011](#). The budget line involved is [BGUE-B2011-19.090100-C8-DEVCO](#).

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Identification

Contract number: DCI-ALA2011/ 271-749 Contracting party: ACE INTERNATIONAL CONSULTANTS SL
 Contract title: Asistencia Técnica: Programa de fortalecimiento de la competitividad de las Pymes y creación de empleo en Argentina

Allocation

Decision	Budget line	Commitment Decision	Commitment Contract	Origin year	Amount(EUR)	Program	Posting criteria	DG	Policy Area
21953	BGUE-B2011-19.090100-C8-DEVCO	SCR.DEC.021953.01.1.B2011	SCR.CTR.271749.01.1.B2011	B2011	1,099,148.00	DCI			55 RELEX
					1,099,148.00				

Commitments



	Contracted (EUR)			Consumed (EUR)			RAL (EUR)	
	Waiting for approval	Approved	Total	Waiting for approval	Approved	Total	Approved	Total
SCR.CTR.271749.01.1.B2014	0.00	1,099,148.00	1,099,148.00	Inv. Acc.	0.00	721,781.59	721,781.59	
BGUE-B2014-21.025102-C8-DEVCO				Paid	0.00	530,273.58	530,273.58	568,874.42

Prefinancing

Commitment	Total pre-financed (EUR)			Cleared pre-financing (EUR)			Balance (EUR)	
	Waiting for approval	Approved	Total	Waiting for approval	Approved	Total	Approved	Total
SCR.CTR.271749.01.1.B2014	0.00	220,000.00	220,000.00	0.00	0.00	0.00	220,000.00	220,000.00

In the Financial Breakdown the commitment and payment request references are hyperlinks allowing you to jump straight to the Budget module for more information from ABAC.

The example below demonstrates the links between the three main levels (Decision - Contract - Invoice) and the budget module.

Entity	Analytical breakdown	Allocations	Financial breakdown = links with SI2 through Budget module
Decision	Financing Agreement headings 1. Total cost 12 M 2. EU Contribution 8 M 2.1. T.A 1.5 M 2.2. Supplies 3.5 M 2.3. M 3. Other contribution. 4. M	 <i>Contract allocation</i>	Level 1 commitment
Contract	Items in a technical assistance Contract 1 Total cost 800.000 1.1. T.A Mr X 400.000 1.2. Per diem 200.000 1.3. 200.000	 <i>Invoice allocation</i>	Level 2 commitment
Invoice		Items in the Invoice 1.1. Fees (Mr X) 350.000 1.2 Per diem 100.000 1.3	Payment request

¹ Legal Entity File / Bank Account File
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