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1. Introduction

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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:

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

4. From DEVCO’s Intranet, by selecting “DEVCO APPLICATION Knowledge Base” dans “DEVCO Tools”: 
You will be directed to the CRIS welcome page of the DEVCO Application Knowledge Base:

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:
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.

1.3.3 First level support requests: USM / DEVCO Application Support

The first-level support requests are handled, according to the same hybrid support 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.

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.

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.
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

[Version française de cette page]

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.

<table>
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<tr>
<th>Direction/DG</th>
<th>Name</th>
<th>Unit</th>
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<td>MAHLBERG Gudrun</td>
<td>R5</td>
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<td>B6</td>
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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

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:

<table>
<thead>
<tr>
<th>Delegation</th>
<th>Country code</th>
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<th>Deputy USM</th>
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<tr>
<td>DEL Afghanistan</td>
<td>AF</td>
<td>DEVCO H</td>
<td>*81454</td>
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<td>DEL African Union</td>
<td>OUA</td>
<td>DEVCO E</td>
<td></td>
<td>MUGENZI GANYANA Georges (EEAS-ADDIS ABABA) DELEGATION AFRICAN UNION CRIS USM</td>
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<tr>
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<td>GACEM Lies KAIA Iliriana DELEGATION ALBANIA CRIS USM</td>
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<tr>
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<tr>
<td>DEL Angola</td>
<td>AO</td>
<td>DEVCO E</td>
<td>*80531</td>
<td>ARZILLO Elisabetta (EEAS-LUANDA) DELEGATION ANGOLA CRIS USM</td>
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<tr>
<td>DEL Argentina</td>
<td>AR</td>
<td>DEVCO G</td>
<td>*80994</td>
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Related pages
Chapter 2: Accessing CRIS
All chapters

GNR - chapter 2

Chapter 2: Accessing CRIS

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  - 2.1 Accessing CRIS
    - 2.1.1 Start up Internet Explorer
    - 2.1.2 On DEVCO’s Intranet homepage
      - 2.1.2.1 Use CRIS
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:
The following buttons will be available:

**CRIS**

- **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 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.

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.
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.

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.
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:

![User: general information screen](image)

2.2.3 'User' screen, 'General Information' tab

You can see your personal data on this page.

![User: general information screen](image)

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.

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

Mailmass 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:

![Mailing List Manager](image)

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.
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.

This opens the 'Signature' page.
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'.

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.

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.
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:

<table>
<thead>
<tr>
<th>Domain</th>
<th>Entity</th>
<th>Role</th>
<th>Constraint code</th>
<th>Constraint value</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASIE - Asia</td>
<td>AOF - Call for tender</td>
<td>ENCOD - Data Entry Agent</td>
<td>DELG - Delegation in charge</td>
<td>IN</td>
</tr>
<tr>
<td>ASIE - Asia</td>
<td>NCR - Note de crédit</td>
<td>GESTFIN - Financial Initiating Agent</td>
<td>DELG - Delegation in charge</td>
<td>IN</td>
</tr>
<tr>
<td>ASIE - Asia</td>
<td>DMP - Request for services</td>
<td>GESTFIN - Financial Initiating Agent</td>
<td>DELG - Delegation in charge</td>
<td>IN</td>
</tr>
<tr>
<td>ASIE - Asia</td>
<td>FAC - Invoice</td>
<td>GESTFIN - Financial Initiating Agent</td>
<td>DELG - Delegation in charge</td>
<td>IN</td>
</tr>
<tr>
<td>ASIE - Asia</td>
<td>FAC - Invoice</td>
<td>ENCOD - Data Entry Agent</td>
<td>DELG - Delegation in charge</td>
<td>IN</td>
</tr>
</tbody>
</table>

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.

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.

![Empowerment Details](image)

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'

![Empowerment Details](image)

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.
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.
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

3 General page layout

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

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

The top left corner of the screen shows the logo (1) indicating the environment you are working in:
- Production: CRIS Accrual
- Training: CRIS Training
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.

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.

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.

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.
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)

![Tabs Example]

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...

![Action Buttons Example]

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.

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.
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 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.

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:
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.

4.2.2 Fields to be checked

Some fields may have to be checked.

E.g.:

| Not co-financed [ ] |
| Parallel co-financing [ ] |
| Joint co-financing [ ] |

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.

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 |
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.:

<table>
<thead>
<tr>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

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):

<table>
<thead>
<tr>
<th>Code</th>
<th>Libellé</th>
</tr>
</thead>
<tbody>
<tr>
<td>DL</td>
<td>Decision Delegation</td>
</tr>
<tr>
<td>DD</td>
<td>Decision Director (by Delegation)</td>
</tr>
<tr>
<td>PH</td>
<td>Empowerment procedure</td>
</tr>
<tr>
<td>PE</td>
<td>Written procedure</td>
</tr>
</tbody>
</table>

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).

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:
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.

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.

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:
To see all budget lines for the Delegation of Russia:

<table>
<thead>
<tr>
<th>Serial Nr</th>
<th>01</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget line</td>
<td>21.07%DEVCO</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Serial Nr</th>
<th>01</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget line</td>
<td>10%LS</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Code</th>
<th>Libellé</th>
</tr>
</thead>
<tbody>
<tr>
<td>FEDF-BFEDF-02.10.21.10.30-10-LS</td>
<td>AIDE HUM.URGEN.AIDCO</td>
</tr>
<tr>
<td>FEDF-BFEDF-02.10.21.10.30-10-LS</td>
<td>AIDE HUM.URGEN.ECHO</td>
</tr>
<tr>
<td>FEDF-BFEDF-02.10.21.10.60-10-LS</td>
<td>AUTRES CHOCS AVEC IM</td>
</tr>
<tr>
<td>FEDF-BFEDF-02.10.21.10.50-10-LS</td>
<td>COMPENSATION INSTABI</td>
</tr>
<tr>
<td>FEDF-BFEDF-02.10.10.01-10-L</td>
<td>ENVELOPPE A # DOTATI</td>
</tr>
<tr>
<td>FEDF-BFEDF-02.10.10.01-10A-L</td>
<td>ENVELOPPE A # DOTATI</td>
</tr>
<tr>
<td>FEDF-BFEDF-02.10.21.10.40-10-LS</td>
<td>INITIATIVES D'ALLÈGE</td>
</tr>
</tbody>
</table>

4.3 Other important icons

4.3.1 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.

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

<table>
<thead>
<tr>
<th>Login</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>MALMKAR</td>
<td>13/05/2003</td>
</tr>
</tbody>
</table>
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.

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.

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.

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)!
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).

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:
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

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 ARG/1997/0483

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

Former system reference JR0103

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

Former system reference PVD/1998/153

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

Former system reference 9-ACP SE-002-001

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'.

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

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,

- 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:

1. **Title bar**: Shows whether you are searching for the right entity (e.g., Decision, Contract, operators...).

2. **'New' button**: Creates a new entity (here, a new Decision).

3. **Type of list and maximum number of records to be found**: Confirms the type of entity and sets the limit for the number of records (default 100, maximum 999).

4. **Default values**: Allows you to store your search criteria for future searches.

5. **Search criteria**: Detailed fields for various search parameters (textboxes and dropdowns).

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:

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

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

6.2.8 Who can edit the list of persons in charge

6.3 Visas

6.3.1 Access to the 'Visas' tab

6.3.2 Layout of the 'Visa' tab

6.3.3 How to read the visa sequence
   • 6.3.3.1 Step number
   • 6.3.3.2 Requested visa
   • 6.3.3.3 Signature

6.3.4 Types of visa: compulsory, temporary, definitive, automatic
   • 6.3.4.1 Compulsory visa
   • 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. 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

![Programming Information Set](image1)

E.g.: Decision (level 1)

![Decision Level 1 Information Set](image2)

E.g.: Measure / project

![Measure / Project Information Set](image3)

E.g.: Contract (level 2)

![Contract Information Set](image4)

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.

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.
6.1.1. Identification

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

- Decision (level 1)

<table>
<thead>
<tr>
<th>Decision No</th>
<th>Domain</th>
<th>Former system reference</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1998 / 003-244</td>
<td>ASIE - Asia</td>
<td>CHD/1998/2200</td>
<td>EC - Ongoing (80/GESTFIN/AC)</td>
</tr>
</tbody>
</table>

- Contract

The Identification zone usually contains:

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

<table>
<thead>
<tr>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>EC - Ongoing (80/GESTFIN/AC)</td>
</tr>
</tbody>
</table>

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.

6.1.2. Information

Example of the information zone of a Decision:

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.

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 | 15,190,000.00 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**: CAL - 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.

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
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

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 Désirélogin 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
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.

Among 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)
- RESP CAD: 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.
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:
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.

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
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.
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.

top ^  

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.

top ^

6.3.4.4 Automatic visa

Visas by 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:
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:

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.
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.*

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.
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'.

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.
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:

- **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:
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.

![Personal current workflow screenshot]

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:
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.

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.

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.
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’.

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).

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.
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'.

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.

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).
6.4.4.3 Show all levels

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

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:

<table>
<thead>
<tr>
<th>Serial No</th>
<th>Title</th>
<th>Break type</th>
<th>Planned amount (final)</th>
<th>Used amount (final)</th>
<th>Balance</th>
<th>Co-Fi</th>
<th>All?</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>Total cost</td>
<td>CT</td>
<td>0</td>
<td>0</td>
<td></td>
<td></td>
<td>N</td>
</tr>
<tr>
<td>02</td>
<td>EU Contribution</td>
<td>UE</td>
<td>0</td>
<td>0</td>
<td></td>
<td></td>
<td>Y</td>
</tr>
<tr>
<td>03</td>
<td>Other contributions</td>
<td>AC</td>
<td>0</td>
<td>0</td>
<td></td>
<td></td>
<td>N</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Serial No</th>
<th>Title</th>
<th>Break type</th>
<th>Planned amount (final)</th>
<th>Used amount (final)</th>
<th>Balance</th>
<th>Inv. Overrun %</th>
<th>All?</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>Total amount</td>
<td>NP</td>
<td>0</td>
<td>0</td>
<td></td>
<td></td>
<td>Y</td>
</tr>
<tr>
<td>99</td>
<td>Non Imputables</td>
<td>NI</td>
<td>0</td>
<td>0</td>
<td></td>
<td></td>
<td>IN</td>
</tr>
<tr>
<td>99.01</td>
<td>Non Convoimé</td>
<td>NC</td>
<td>0.00</td>
<td>0.00</td>
<td>0</td>
<td></td>
<td>Y</td>
</tr>
<tr>
<td>99.02</td>
<td>Advances</td>
<td>AV</td>
<td>0.00</td>
<td>0.00</td>
<td>0</td>
<td></td>
<td>Y</td>
</tr>
<tr>
<td>99.03</td>
<td>Pénalités</td>
<td>PE</td>
<td>0.00</td>
<td>0.00</td>
<td>0</td>
<td></td>
<td>Y</td>
</tr>
<tr>
<td>99.04</td>
<td>Recouvrlements</td>
<td>RC</td>
<td>0.00</td>
<td>0.00</td>
<td>0</td>
<td></td>
<td>Y</td>
</tr>
<tr>
<td>99.05</td>
<td>Rétentions</td>
<td>RT</td>
<td>0.00</td>
<td>0.00</td>
<td>0</td>
<td></td>
<td>Y</td>
</tr>
</tbody>
</table>

- 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...).
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:
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

**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.

---

### 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?'

  ![Detail Table](detail_table.png)

- 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)

![Information Table](information_table.png)

#### 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:

  ![Sub-levels Table](sub-levels_table.png)

  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.
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.

#### 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.

- **Total cost = EU contribution**

  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).

- **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:**

<table>
<thead>
<tr>
<th>Serial No</th>
<th>Title</th>
<th>Break type</th>
<th>Planned amount (final)</th>
<th>Used amount (final)</th>
<th>Balance</th>
<th>Co-F</th>
<th>All?</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>Total cost</td>
<td>ET</td>
<td>250000000</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>EU Contribution</td>
<td>UE</td>
<td>20000000</td>
<td></td>
<td></td>
<td></td>
<td>Y</td>
</tr>
</tbody>
</table>
6.5. Financial breakdown

6.5.1. Go to the 'Financial breakdown' tab

Click on the tab

Financial breakdown

top ^

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)

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.516818

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 - EDFSttransaction 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).

---

**6.5.2.2. Financial breakdown of a Contract**

![Financial breakdown of a Contract](image)
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)
  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.:**

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.
- **Policy area**: policy area of the EC's financing Decision.
  - e.g.: DEV: "Development and relations with African, Caribbean and Pacific (ACP)"
- **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.

### 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.

### 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.
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 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 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.
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.

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

6.6.3. 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'.
2. Click on ‘New’ in the lower part of the screen and fill in the available fields.

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:
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

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.
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](mailto: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](mailto: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](https://devco-intranet.com).
To add a document to the list:
1. Click on “New” in the lower part of the screen

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.
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.
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.
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.
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
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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.

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 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.

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.

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.
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.

<table>
<thead>
<tr>
<th>Entity</th>
<th>Analytical breakdown</th>
<th>Allocations</th>
<th>Financial breakdown = links with SI2 through Budget module</th>
</tr>
</thead>
<tbody>
<tr>
<td>Decision</td>
<td>Financing Agreement headings</td>
<td></td>
<td>Level 1 commitment</td>
</tr>
<tr>
<td></td>
<td>1. Total cost 12 M</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. EU Contribution 8 M</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2.1. T.A. 1.5 M</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2.2. Supplies 3.5 M</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2.3. ... M</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. Other contribution 4. M</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contract</td>
<td>Items in a technical assistance Contract</td>
<td></td>
<td>Level 2 commitment</td>
</tr>
<tr>
<td></td>
<td>1 Total cost 800,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>1.1. T.A. Mr X 400,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>1.2. Per diem 200,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>1.3. ... 200,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Invoice</td>
<td>Items in the Invoice</td>
<td></td>
<td>Payment request</td>
</tr>
<tr>
<td></td>
<td>1.1. Fees (Mr X) 350,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>1.2. Per diem 100,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>1.3. ...</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1 Legal Entity File / Bank Account File