Sixth Framework Programme

CPF Editor

Users Guide

Version 1.7 October 2004

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1 Introduction

1.1 Background

The Contract Preparation Form software support tool (CPF Editor) provides the basis for editing information during FP6 contract negotiations and the input data for preparing the final contract. This information must be complete, consistent with the negotiations and correct. It is the responsibility of the contractor to check the information and ensure it is up to date and accurate. Any problems with the data may lead to delays in concluding the contract.

Any questions regarding the negotiation process will be answered by the Project Officer assigned to the Project.

1.2 Purpose

The CPF Editor combines a template document with existing data to produce an editable data file. This makes it simple to update the necessary information for the contract. The templates contain all the fields that are used for contractual and statistical purposes. The application can be used to validate that all the necessary information has been provided.

1.3 Scope of the Document

This document covers the features of the CPF Editor (version 2.8) user interface and the basic functions that allow the data to be checked, edited and then printed. Key points to remember are shown using the symbol 2.

For each FP6 contract Instrument, Integrated Projects, Networks of Excellence etc, the details required will vary and so the detailed content of the individual fields is not covered by this document.

2 *The detail of the individual fields is defined in the Guide for Contract Preparation covering the relevant instrument.*

The CPF Editor covers only the administrative data of the contract. The Project Technical Annex has still to be prepared along with other necessary documents.

There is some information relating to the negotiations that are included in the contract but are not included in the CPF Editor, such as special conditions. These will be dealt with by the Project Officer.

1.4 Reference Documents

Details of the individual fields in the Contract Preparation Forms can be found in the document Guidelines for Contract Preparation.

2 *All important documents can be found on CORDIS* *http://www.cordis.lu/fp6/find-doc.htm*

The CPF Editor uses data from the Proposal submission or other available data as a starting point and so the original Proposal Documents can be used for reference.

1.5 Configuration Required

The CPF Editor is a Window's application and runs on Windows NT, Windows 98/Me, Windows 2000 and Windows XP. The minimum specification for the PC is either a Pentium II PC with 64Mb Memory or the minimum recommended specification of the operating system. The CPF Editor data file uses XML format.

2 Distributing files and file naming convention

2.1 The Application

The CPF Editor application can be downloaded from the CORDIS Site on the internet.

www.cordis.lu/fp6/contractpreparation

Follow the link on the web page to the electronic submission tool for CPF. This gives information on how to download the files from the internet.

The application is compressed into a single file (winzip format) and the files must be extracted to use the application. The CPF Editor has a number of files necessary to function properly. These are:-

Cpfeditor.exe	The cpfeditor main executable file
Cpfeditor.ini	Configuration details.
*.pbd	Necessary support files
*.dll	Application extension files
*.scc	Necessary files
LOVs*.lov	List Of Values files. Contain text

There are a number of files with the extension *.LOV These provide a list of values associated with one or more fields in the Contract Preparation Forms.

2.2 Version of the software application

The version of the software can be found by selecting the Help Menu About Option. This will display the following dialog box containing the version number information.

2.3 The Data File

After the Commission decision confirming the contract can be negotiated, the Commission will send a copy of the CPF data file and this document to the co-ordinating partner for distribution to the participants. The data file contains information about the project submitted at the proposal stage and should be stored in the same directory as the CPF Editor application files.

The co-ordinating partner is responsible for distributing the data file to all the contractors and it is up to each contractor to keep the information relevant to themselves up to date and accurate.

The contractors should use the file naming convention proposed by the Commission to assist in the correct handling of the CPF data file.

2.4 Basic file management

The co-ordinating partner should check that the file name of the data (.cpf) file has the right information for the Project to be negotiated. The Commission is using a naming convention and so it should be possible to identify that the file that has been received is the correct one for the Project. The structure of the file name is as follows.

(Programme)-(CallID)-(ProposalID)-(InstrumentID)-*nn*.CPF

Where:

Programme	-is the programme under which the contract is negotiated
CallID	-identifies the call under which the contract is negotiated
ProposalID	-is a unique identifier
InstrumentID	-identifies the instrument relating to the contract.
nn	-is a two digit number used by participants for identifying file. 2 It is omitted in the file sent by the Commission

2 If the Programme, Call, Proposal, and Instrument details in the file name are not the ones for your project then contact your Project Officer.

The co-ordinating partner must forward copies of the CPF Editor, the original CPF data file and the support files to all participant organisations in the project.

It is recommended that each participant create a separate working area on a PC for the files relating to contract negotiations and that the CPF Editor application, the associated data file and the support files are stored in it.

You should use a **working copy** of the file for updating and make sure that an **original** is stored elsewhere (see section 6.2 Preparation)

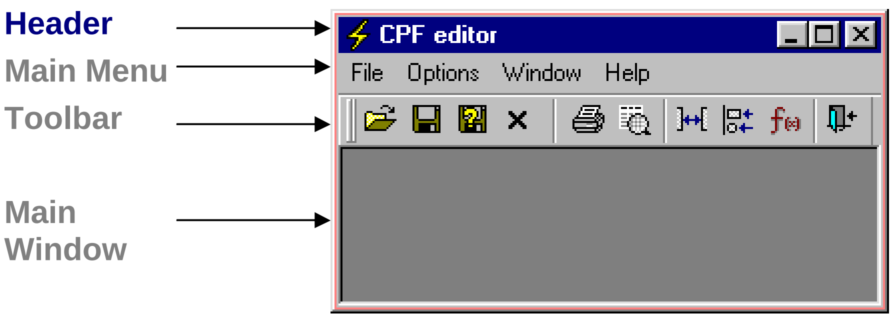
Any participant may introduce additional or alternative file management, or version control measures, in line with in house procedures, if appropriate. For the Commission the important thing is that the final version is up to date and has the original filename.

3 Opening the CPF Editor

3.1 Introduction

All partners will need to open the CPF data file and view the data in it. The CPF Editor is a standard software application and can be run by double clicking on the icon in NT Explorer or Windows Explorer, after installation.

When the file is first opened the user interface contains no data and this has to be loaded to start editing.

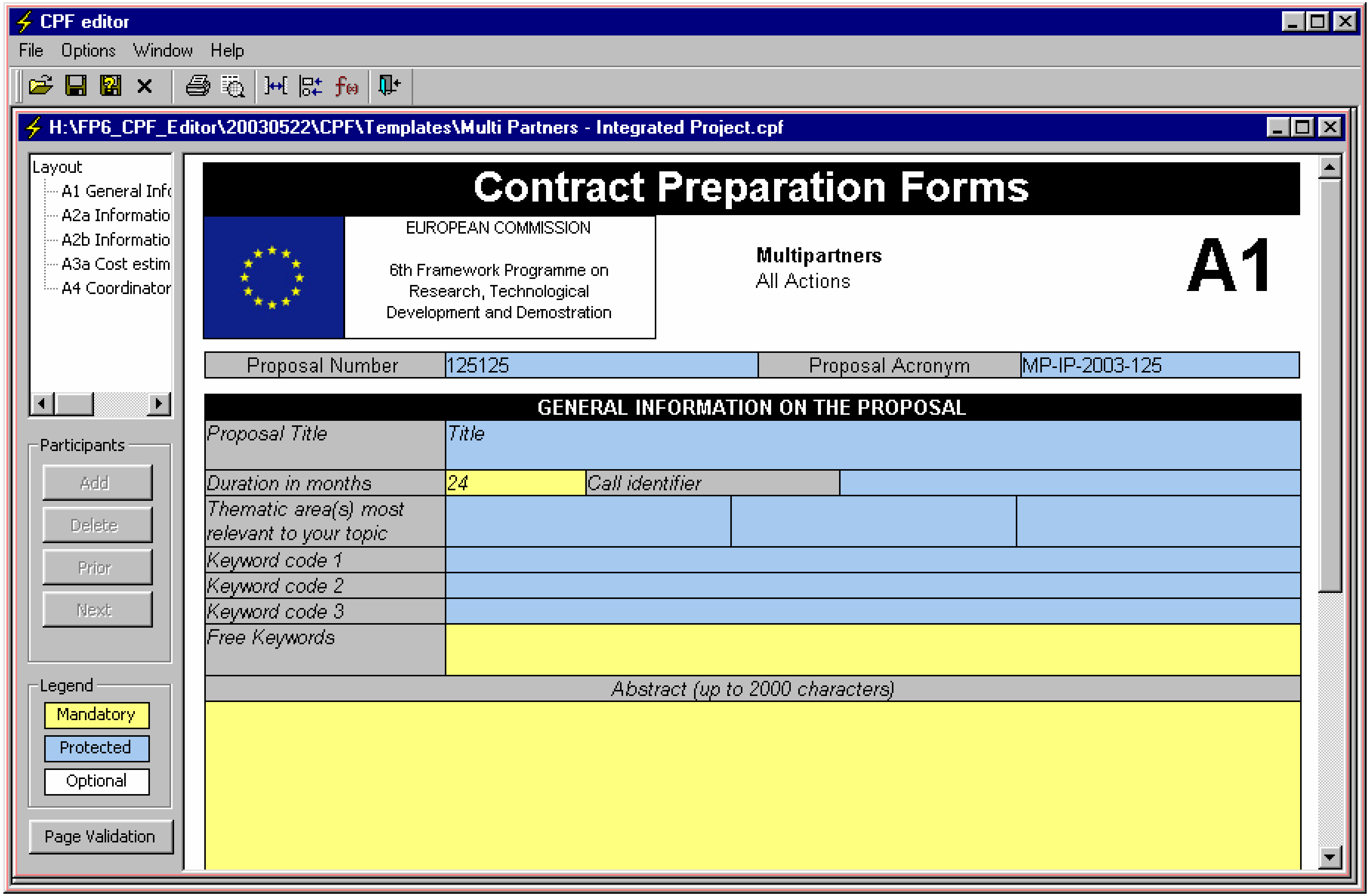


The user interface is simple and straightforward, with the main functionality available from both the main menu bar and a simple icon toolbar.

The **working copy** of the CPF data file can be opened using the standard file open Icon  on the toolbar or using the File Menu Item Open. This will display a standard file open dialogue box which uses Contract Preparation Forms (*.CPF) file type. Browse for the data file where it was stored and open it. The data will be loaded into the main window for viewing and editing.

The following diagram and table provide notes on the user interface of an open CPF Editor data file.

The basic user interface of the CPF Editor with a data file open



Main features of the User Interface table

The table summarises the main features of the user interface.

Feature	Type	Purpose	Notes
Header	Window Header	Identifies the file name of the currently open CPF data file.	H:\FP6_CPF_Editor\ ……. in the diagram. Useful reference for filename.
Layout	Heading	Section Header	The layout section displays the available forms for the instrument.
<<A*n*>>	CPF link to form An,	To provide access to each form.	When selected changes display windows to display form An, where n is the form number *n*
Participants	Heading	Section Header	A consortium can be made up of one or more participants. This section allows the user to navigate through the participant information, view it and edit it.
Add	Button	Adds a set of participant forms to the CPF	Edit Function – Only available when participant forms A2a are displayed
Delete	Button	Deletes the currently selected set of participant forms to the CPF	Edit Function – Only available when participant forms A2a are displayed
Prior	Button	Navigation Function	Goes to the previous set of participant forms
Next	Button	Navigation Function	Goes to the next set of participant forms
X of Y	Message	Indicates the participant number of the currently displayed participant details	Only displayed when participant forms are displayed. X is the number of the participant and Y the number of participants in the consortium.
Main Display	Window	Displays all forms associated with the contract instrument.	CPF Forms are displayed and can be edited in this area. The form A2a is displayed in the example.
Legend	Heading	Section Head	The legend is for the description of the different types of field in the main display. The content will vary from page to page and instrument to instrument.
Mandatory	Note	Colour code (yellow) indicates mandatory field in the display area	The consortium must complete any mandatory fields, otherwise it will not be possible to produce the contract.
Protected	Note	Colour code (blue) indicates protected field in the display area	A protected field cannot be edit by the consortium and contains essential proposal information.
Optional	Note	Colour code (white) indicates optional field in the display area	These fields are optional.
Page Validation	Button	To check to ensure that the data is entered.	See procedure on validation of the data.

3.2 Saving Data

If any changes are made to the data file then save the updated file using the icon . This will **overwrite** the **working copy of** the data file**.**

It is important to note that if the participant changes information then it is necessary to save the **working copy** to a **unique copy per participant** for collating by the co-ordinating partner (see Collation).

The recommended method for uniquely identifying a participant's version of the cpf data file is to use the optional two digit number allocated in the file naming convention. Therefore the file name for a copy of the working document being edited by the co-ordinating partner to update their **participant** information will be

(Programme)-(CallID)-(ProposalID)-(InstrumentID)-01.CPF

Select the icon or the File Menu item Save as. The simplest method is to save each file name using the optional *nn* number identified in the file naming convention. For example, the file for participant number 3 will be named:

(Programme)-(CallID)-(ProposalID)-(InstrumentID)-03.CPF

3.3 Closing the data file and exiting the CPF Editor

To close the cpf data file without exiting the application select the File Menu Item 'Close'. To exit the CPF Editor select the icon from the toolbar or the File Menu Item 'Exit'.

2 No warning is given reminding you to save data when closing or exiting and so please remember to save the data frequently.

4 Checking and Editing the Data

4.1 Introduction

There are several reasons why the information in the CPF Editor is incomplete or inaccurate. The data is a subset of the information supplied at the time the proposal was submitted and information can change over time. Where appropriate some organisational data may be added from other Commission databases on the participant organisation.

The table gives some possible scenario's that might lead to inaccurate data and the impact it will have on the information in the data set.

Situation	**Consequences**
The company has issued a new set of annual financial documents (e.g. balance sheet)	Financial data for the participant need to be updated
The original contact person has left the company or moved offices.	Contact person needs to be deleted, added or modified
The company has been taken over, merged or its head office has moved.	Participant details will have changed and also possibly banking arrangements.
The Evaluation of the proposal recommended certain changes in the Project budget	Budget distribution of all the partners.
The Commission has requested certain changes to the proposal	Most likely to effect the Technical annex but may impact on one or more CPF (project duration)
Additional information is required for the contract that is not required for the proposal	For example, additional financial information

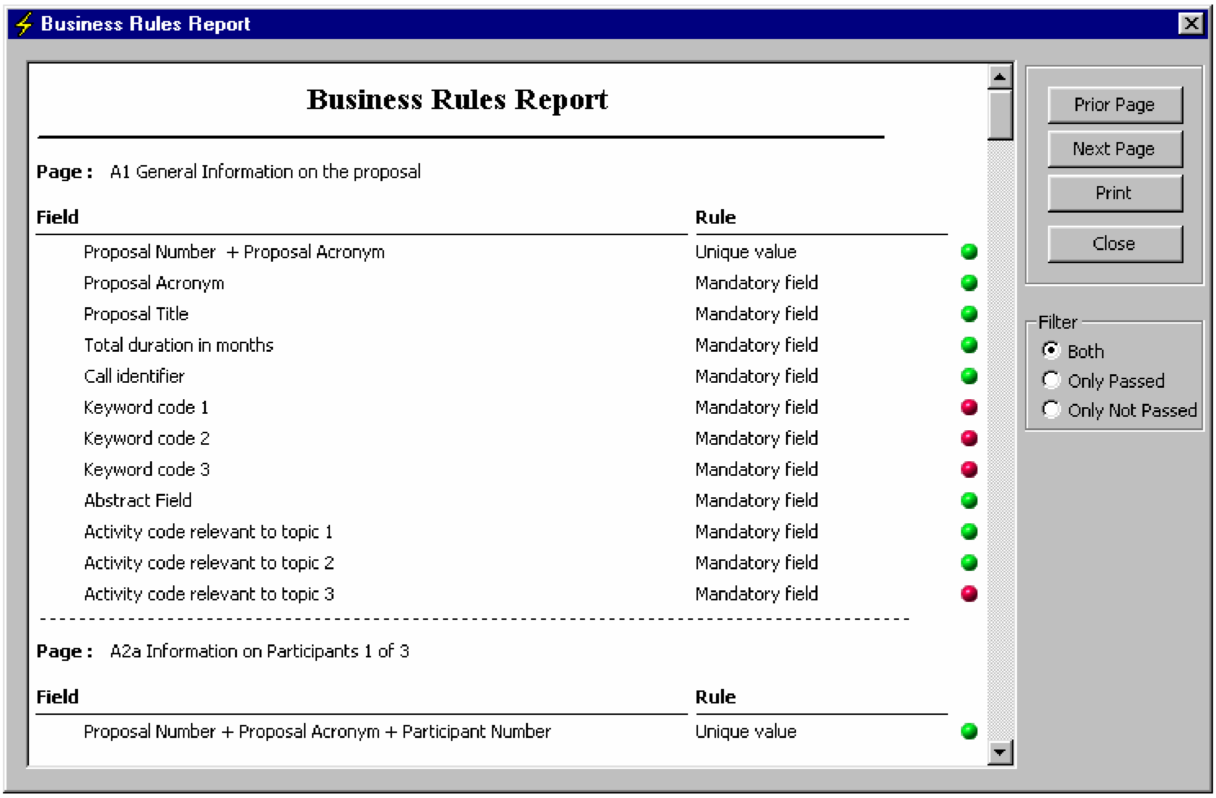
2 It is therefore important to verify all the data in the CPF data File.

The Guidelines for Contract Preparations contains information on the content of the individual CPF forms and should be used as references for the requirements of any individual fields.

4.2 Completeness Check the Business Rules Report

The CPF Editor does support basic checking for **completeness** by providing a function to give information on whether the mandatory and protected content of the forms is included or not. If the Business Rules Report shows that a field should be completed but you feel that, in your particular case, it is not relevant then contact your Project Officer for advice.

The following dialog box and table provide the information in relation to the business rules.



Business Rules Report

Business Rules Report table of features

Feature	Type	Purpose	Notes
Business Rules Report	Header	Heading	Displays the results of Business Rules test.
<<Page>>	Header	Indicates page on a form	The text associated with the header identifies the page for which the rule applies.
<<Field>>	[number]	Indicates partner number	The number in [] is associated with the partner (participant number) for which the rule applies.
<<Field>>	Header	Indicates field on a form	The text associated with the header identifies the field for which the rule applies.
<<Rule>>	Header	Indicates type of field on a form	Only mandatory and protected fields have rules associated with them. If there is a number [n] displayed it is the participant number.
Status	icon	Section Header	The green icon indicates that the field has complied with the rule. The red icon that it has not.
	Checkbox	Selection of participants	When selected the participant information will be printed for Entire CPF and Participant Information options
Prior	Button	displays the previous page	This button does not work if page validation has been used to display the information in the display area.
Next	Button	Goes to the next page	This button does not work if page validation has been used to display the information in the display area.
Print	Button	Prints page	Prints the **displayed contents** based on the filter. There is no print dialog box.
Close	Button	Close the dialog box	Closes the dialog box.
Filter	Header		
Both	Radio button	Indicator	Displays both passed and not passed fields. It is recommended that this default setting is used for participant data in large consortiums.
Only passed	Radio button	Indicator	Displays only fields that have the status indicated by the green icon, sorted by field name not participant number.
Only not passed	Radio button	Indicator	Displays only fields that have the status indicated by the red icon, sorted by field name not participant number..

There are two levels of checking, page validation and file validation. The page validation button will provide information on the **current** page. The icon and the Options menu item ‘ Check business rules’ will provide information on the entire file.

> 2It is recommended for large consortiums, the default setting when the windows is opened of ‘both’ is used for participant data because the data is sorted by participant number. The other filter options sort the information by field name.

There are some fields, mainly relating to details of the organisation that are not included in the data and must be completed. This is because they were not provided in the original proposal or not included in the evaluation data set. The missing information can vary with the different instruments and for different organisations but some of the main fields are summarised in the table.

Information Type	***Possible** missing **data.***
General Project Information	Keywords
Participant Information	Size of organisation (various fields) Number of researchers (number of researcher)
Contact Information	Administrative details (various fields)
Budget Information	None
Banking Information	All
Financial Data	All (Project Officer to advise)

4.3 Non CPF data

During contract negotiations there is some information that is not recorded in the CPF Editor. This mainly relates to special conditions in the contract and some internal administrative information. This will be dealt with by the Project Officer in generating the contract.

4.4 Correctness Check

The responsibility for checking data depends on the type of data. The co-ordinating partner should be responsible for project information and co-ordinator partner banking information while the individual participant should edit their own information, both legal and financial. This includes the budget allocation for the contractor in the budget estimate table.

Information Type	***Responsibility***
General Project Information	Co-ordinating partner
Participant Information	Participant
Contact Information	Participant
Partner Financial Data	Participant
Budget Information	Participant
Banking Information	Co-ordinating partner

4.5 Editing Information

When editing the data there is a simple rule to be followed: -

> *If you are editing participant information, including participant budget data, you should do the changes in the file that has the participant number in the file name. The co-ordinating partner will have the number 01.*
>
> *If you are editing project or banking information then the co-ordinating party should use the working copy with no participant number*

It is not necessary to correct the information in the CPF immediately, some information is not included and other information may be subject to further negotiation, such as adjustment to the budgets. However, editing the data is straightforward for the mandatory and optional fields. Simply type any new or modified information into the relevant data field, or select the required item from the list box.

2 Only the Co-ordinating partner should change the project information.

4.6 Comparing Information

There is a further check available on the edited data by comparing the edited working copy of the file with the original using a comparison tool included in the CPF Editor. This check is optional.

To make the comparison, the **working copy** of the CPF data file is opened using the standard file open Icon or using the File Menu Item Open.

Select the Options Menu Item 'Compare file' or select the icon . This will display a standard file open dialog box. Browse for the **original** version of the cpf data file and open that.

A comparison window is opened. Where changes have been made the fields will provide the relevant information on the change (information removed, modified or added). Check that the changes are in line with what was expected as a result of editing the file.

The details of the Compare Window are given in the diagram and the table.

Diagram of the Compare Window.

Table of the main features of the Compare Window

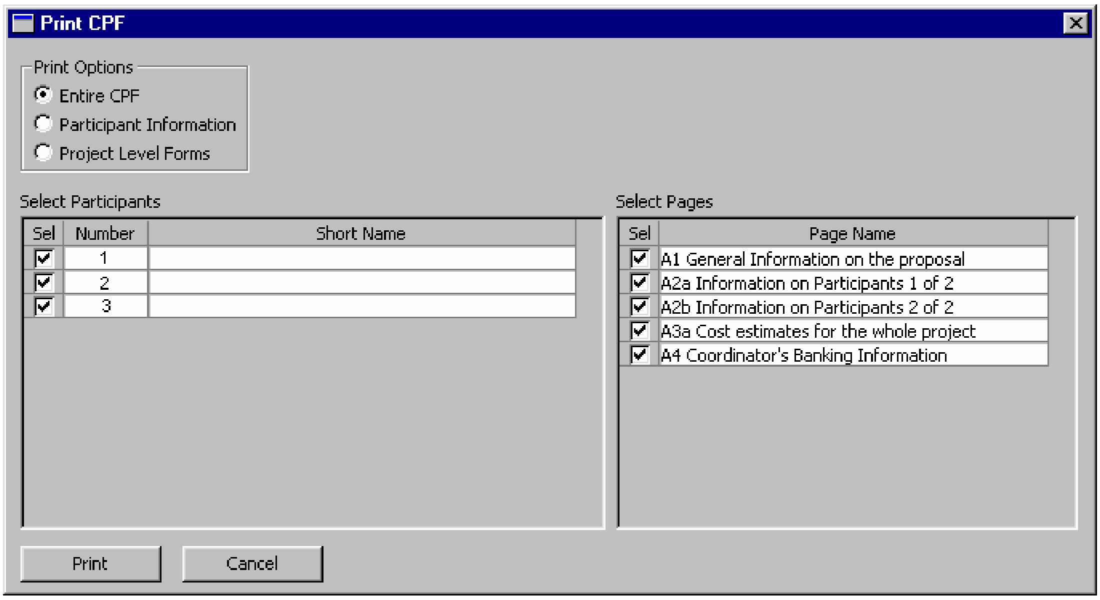
Feature	Type	Purpose	Notes
Header	Window Header	Identifies the window as a comparison	
Layout	Heading	Section Header	
<<A*n*>>	CPF link to form An,	Select to display form An	When selected changes display windows to display form An, where n is the form number
Navigation	Heading	Section Header	.
Prior	Button	Goes to the next page	Navigation Function
Next	Button	Goes to the previous page	Navigation Function
Legend	Heading		
Removed	Note	Information	Colour code (red) indicates mandatory field in the display area
Added	Note	Information	Colour code (green) indicates mandatory field in the display area
Modified	Note	Information	Colour code (purple) indicates mandatory field in the display area
Equal	Note	Information	Colour code (white) indicates mandatory field in the display area
Close	Button	Close the window	

5 *Printing Information*

To print the Contract Preparation Forms select the File Menu Item Print or click on the icon 

This will display a print dialog box with a number of options. Select the radio button option and select the Print button.

The Print dialog Box for the CPF Editor



The print dialog box contains a number of useful printing options based on a general set of Print options and individual options for participants and pages. Data can be printed for the project as a whole or by participant. The printing options are summarised in the table. The layout of the Print CPF dialog box is given in the diagram.

Print CPF dialogue box table of controls and options

Feature	Type	Purpose	Notes
Print Options	Heading	Section Header	
Entire	Radio Button	Prints All CPF's	Prints all forms **unless** forms are deselected in the other sections
Participant Information	Radio Button	Prints only participant information	Select require participants from Participants list for printing.
Project Level Forms	Radio Button	Prints project only information	Will only print out only some of the project level forms, for example, co-ordinators banking details.
Select Participants	Heading	Section Header	Displays all of the participants in the project.
Sel	Checkbox	Selection of participants	When selected the participant information will be printed for Entire CPF and Participant Information options
Number	Number	Gives the participant number	Edit Function. Delete - Only available when participant forms are displayed
Short Name	Text	Displays shortname of the participant	Displays the short name given in form A2a for the contractor.
Select Pages	Heading	Goes to the previous set of participant forms	When selected the participant information will be printed for Entire CPF and Participant Information options
Sel	Checkbox	Indicates pages to be printed	
Page Name	Window	Displays Form A1-A4	Displays the page name (A1-A4) given in the layout section. Pages vary with the different instruments.
Print	Button	Prints the selected information	
Cancel	Button	Cancels printing	

5.1 *Co-ordinator Banking Details*

The co-ordinator banking details should be printed as soon as the information is complete and correct as the form must be signed by the bank and returned to the Commission.

6 *Collating the Data for Submission*

6.1 *Introduction*

All participants must check the information in the CPF Editor data file. This is to ensure that the information relevant to them is up to date and correct. However, the correct data is then contained in a number of files each with the different participant details.

The CPF Editor allows the participant information to be collated centrally by the co-ordinating partner. This is why the naming convention for each participant data is required as it allows effective discrimination of participant information while it is collated.

6.2 Preparation

All the participant data files should be returned to the co-ordinating partner for collation towards the end of negotiations or provide the co-ordinating partner with a note confirming that the original data is correct. Either way all participants must take responsibility of the correctness of their own data and where necessary provide printed and signed documents to the co-ordinating partner.

The result is that the co-ordinating partner should have the files such that the details of the all of the participants 1 to n are available to the co-ordinator.

(Programme)-(CallID)-(ProposalID)-(InstrumentID).CPF	Working Copy
(Programme)-(CallID)-(ProposalID)-(InstrumentID)-01.CPF	Co-ordinator
(Programme)-(CallID)-(ProposalID)-(InstrumentID)-02.CPF	Participant 2
.	
.	
(Programme)-(CallID)-(ProposalID)-(InstrumentID)-*nn*.CPF	Participant nn

The co-ordinator will have two files, the working copy and its information as participant 1. This allows the participant information to be edited separately from the project information, if required.

6.3 Consolidation

Files are consolidated by importing the **participant information**, one participant at a time.

To import files, the **working copy** of the CPF data file is opened using the standard file open Icon  or using the File Menu Item Open.

Select the Options Menu Item 'Import participant data' or select the icon. . This will display a standard file open dialog box. Browse for the participant cpf data file required and open that. Select (Sel) the participant details to be imported and select the button Import. This will overwrite the imported participant data.

Note: Due to a temporary problem with the CPF Editor, you should import the data of all the different participants starting from the lower participant number until the highest one. Otherwise, there will be a problem with the order of the participants.

Import Participants dialog box

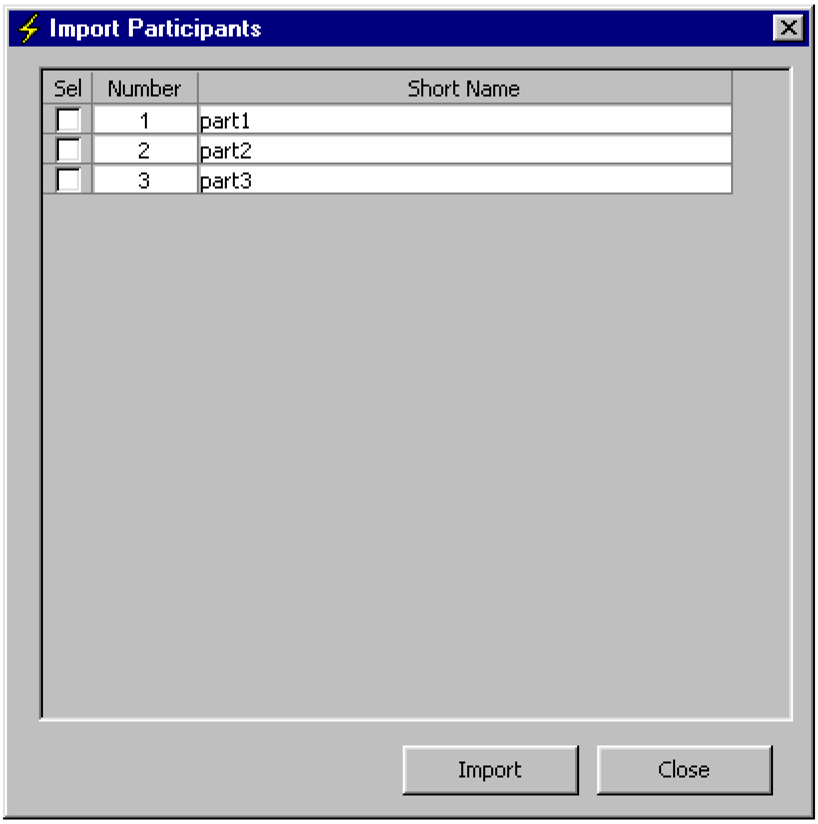


Table of features of the Import Participant dialog box

Feature	Type	Purpose	Notes
Import Participant	Heading	Section Header	
Sel	Checkbox	Selection of participants	When selected the participant information will be printed for Entire CPF and Participant Information options
Number	Number	Gives the participant number	Edit Function. Delete - Only available when Form A2a is displayed
Short Name	Text	Displays shortname of the participant	Displays the short name given in form A2a for the contractor.
Import	Button	Imports the selected participant	
closes	Button	Closes the dialog box	

2 It is essential that only one set of participant data is selected for each cpf data file otherwise the original data will be overwritten.

6.4 Final checks

If more than one partner is selected in an import participants dialog box then it will overwrite the data for the participants and the information will be incorrect. To ensure that the final data is complete the co-ordinating partner should do a final completeness check on the data.

Also, by comparing the final version of the working copy with the original it is possible to do some quick checks on the data. If the comparison indicates no changes between the original and the final working copy when changes have been made on the original data, then there is a problem

If there were no changes to the participant information during negotiations then the fields should all be equal.

7 Return the file to the Commission

7.1 Introduction

The final copy of the file with the name (Programme)-(CallID)-(ProposalID)-(InstrumentID).CPF, no participant numbers, should be returned to the Commission as soon as the information is thought to be correct, even if the negotiations have not been concluded. This is because the Commission prior to contract being generated will carry out certain checks and the earliest this data is available for these checks the better.

7.2 Signature

Where signatures are required to documents these should be printed out and signed by the relevant authorised authority.

8 Old files

If old CPF files (saved with version 1.5 or version 2.0) are open with the latest version of CPF Editor (e.g. 2.8), the Editor will specify that those files are from on old format and it will convert them to the new version.

9 Help

9.1 Getting Help

The first contact on any issues relating to the negotiations should be with the Project Officer. However, technical questions about the CPF Editor can be addressed to the following e-mail address.

EC-FP6-IT-HELPDESK@cec.eu.int

9.2 Troubleshooting

Below are a list of possible problems and how to solve them.