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DIRECTORATE-GENERAL FOR EDUCATION AND CULTURE

Modernisation of Education I: Europe 2020, country analysis, Erasmus+ coordination
Erasmus+ Programme coordination and National Agencies management

Technical instruction for use of Grant Agreement and Grant Agreement annexes templates with EPlusLink Quick Report queries

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Authors:	EAC Business Helpdesk
Revised by:	
Approved by:	
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Commission européenne/Europese Commissie, 1049 Bruxelles/Brussel, BELGIQUE/BELGIË - Tel. +32 22991111

http://ec.europa.eu/dgs/education_culture

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1. PURPOSE OF THIS DOCUMENT

This document aims to provide the technical description of the method of injecting data from the EPlusLink queries to the 2015 grant agreement templates and corresponding annexes.

This technical instruction applies to Word templates for Grant Agreement, Grant Agreement annexes and corresponding EPlusLink queries in Quick Reports listed in the table below.

Grant Agreement or annex	**Word template name**	**EPlusLink Quick Report query name**
II.1 – Mono-beneficiary GA	II.1 – Mono-beneficiary GA.docx	2015_MonoBeneficiaryAgreement
II.2 – Multi-beneficiary GA	II.2 – Multi-beneficiary GA.docx	2015_MultiBeneficiaryAgreement
II.2.6 – Multi-beneficiary GA Annex VI	II.2.6 – Multi-beneficiary grant agreement List of other beneficiaries - Annex VI.docx	2015_MultiBeneficiaryAgreement_ListOfBeneficiaries
KA101 Annex I KA101 Annex II	KA101 Annex I and Annex II.docx	2015_KA101_ANNEX_I_II
KA102 Annex I	KA102 Annex I.docx	2015_KA102_ANNEX_I
KA102 Annex II	KA102 Annex II.docx	2015_KA102_ANNEX_II
	KA102 Annex II - Travel.docx	2015_KA102_ANNEX_II_Travel
	KA102 Annex II - SpecialNeedsSupport.docx	2015_KA102_ANNEX_II_SpecialNeedsSupport
	KA102 Annex II - LinguisticSupport.docx	2015_KA102_ANNEX_II_LinguisticSupport
	KA102 Annex II - IndividualSupport.docx	2015_KA102_ANNEX_II_IndividualSupport
	KA102 Annex II - ExceptionalCosts.docx	2015_KA102_ANNEX_II_ExceptionalCosts
KA103 Annex I	KA103 Annex I.docx	2015_KA103_ANNEX_I
KA103 Annex II	KA103 Annex II_1.docx	2015_KA103_ANNEX_II_1
	KA103 Annex II_2.docx	2015_KA103_ANNEX_II_2
KA104 Annex I	KA104 Annex I.docx	2015_KA104_ANNEX_I
KA104 Annex II	KA104 Annex II.docx	2015_KA104_ANNEX_II
KA105 Annex I	KA105 Annex I.docx	2015_KA105_ANNEX_I
KA105 Annex II	KA105 Annex II - Budget Summary.docx	2015_KA105_ANNEX_II
	KA105 Annex II - Exceptional Costs.docx	2015_KA105_ANNEX_II_ExceptionalCosts
	KA105 Annex II - Individual Support.docx	2015_KA105_ANNEX_II_IndividualSupport
	KA105 Annex II - Linguistics Support.docx	2015_KA105_ANNEX_II_LingusticSupport
	KA105 Annex II - Organisational Support.docx	2015_KA105_ANNEX_II_OrganisationalSupport
	KA105 Annex II - Special Needs Support.docx	2015_KA105_ANNEX_II_SpecialNeedsSupport
	KA105 Annex II - Travel.docx	2015_KA105_ANNEX_II_Travel

Grant Agreement or annex	Word template name	EPlusLink Quick Report query name
KA107 Annex I	KA107 Annex I - Activity Details.docx	2015_KA107_ANNEX_I_ActivityDetails
	KA107 Annex I - Project Description.docx	2015_KA107_ANNEX_I_ProjectDescription
KA107 Annex II	KA107 Annex II - Budget Summary per Country.docx	2015_KA107_ANNEX_II_BudgetSummaryPerCountry
	KA107 Annex II - Budget Summary.docx	2015_KA107_ANNEX_II_BudgetSummary
KA2 Annex I	KA2 Annex I.docx	2015_KA2_ANNEX_I_IO_ME_LTT
	KA2 Annex I A - Intellectual Outputs.docx	2015_KA2_ANNEX_IA_IntellectualOutPuts
	KA2 Annex I B - Multiplier Events.docx	2015_KA2_ANNEX_IB_MutliplierEvents
KA2 Annex II	KA2 Annex II.docx	2015_KA2_ANNEX_II
KA347 Annex I	KA347 Annex I.docx	2015_KA347_ANNEX_I
KA347 Annex II	KA347 Annex II.docx	2015_KA347_ANNEX_II
	KA347 Annex II - Travel.docx	2015_KA347_ANNEX_II_Travel
	KA347 Annex II - Special Needs Support.docx	2015_KA347_ANNEX_II_SpecialNeedsSupport
	KA347 Annex II - Organisational Support.docx	2015_KA347_ANNEX_II_OrganisationalSupport
	KA347 Annex II - Exceptional Costs.docx	2015_KA347_ANNEX_II_ExceptionalCosts

The table above shows all queries and templates for the relevant actions managed in EPlusLink. However, only applicable subset of queries and templates should be used to generate a set of documents for an individual project. For example, for projects in KA101, the following set of documents and queries should be used:

Grant Agreement or annex	Word template name	EPlusLink Quick Report query name
II.1 – Mono-beneficiary GA	II.1 – Mono-beneficiary GA.docx	2015_MonoBeneficiaryAgreement
KA101 Annex I	KA101 Annex I and Annex II.docx	2015_KA101_ANNEX_I_II
KA101 Annex II		

Other actions may have more templates and queries need for generation of the set of documents. The following is an example for KA105.

Grant Agreement or annex	Word template name	EPlusLink Quick Report query name
II.2 – Multi-beneficiary GA	II.2 – Multi-beneficiary GA.docx	2015_MultiBeneficiaryAgreement
II.2.6 – Multi-	II.2.6 – Multi-beneficiary grant	2015_MultiBeneficiaryAgreement_ListOfBeneficiaries

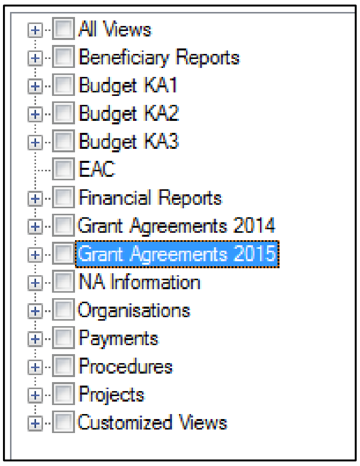
Grant Agreement or annex	Word template name	EPlusLink Quick Report query name
beneficiary GA Annex VI	agreement List of other beneficiaries - Annex VI.docx	
KA105 Annex I	KA105 Annex I.docx	2015_KA105_ANNEX_I
KA105 Annex II	KA105 Annex II - Budget Summary.docx	2015_KA105_ANNEX_II
	KA105 Annex II - Exceptional Costs.docx	2015_KA105_ANNEX_II_ExceptionalCosts
	KA105 Annex II - Individual Support.docx	2015_KA105_ANNEX_II_IndividualSupport
	KA105 Annex II - Linguistics Support.docx	2015_KA105_ANNEX_II_LingusticSupport
	KA105 Annex II - Organisational Support.docx	2015_KA105_ANNEX_II_OrganisationalSupport
	KA105 Annex II - Special Needs Support.docx	2015_KA105_ANNEX_II_SpecialNeedsSupport
	KA105 Annex II - Travel.docx	2015_KA105_ANNEX_II_Travel

1.1. Location of grant agreement Word templates

The Word templates for the grant agreement and grant agreement annexes can be found on CIRCABC at https://circabc.europa.eu/w/browse/fe9e5c52-55f8-47d5-853e-4c7956fd4ef1 or by browsing the folders in Library > Erasmus+ > Contractual and financial management > 2015 Guide for NAs > Annex II-A - Agreements betw NAs and beneficiaries

1.2. Location of grant agreement EPlusLink queries

The queries for 2015 grant agreement and grant agreement annexes can be found in EPlusLink, Quick Reports module, "Grant Agreements 2015" branch. Individually, the queries can be also found in "All Views" category.



2. General overview

The purpose of grant agreement templates and EPlusLink queries is to provide National Agencies with a complete solution for generation of grant agreements for Erasmus+ Programme beneficiaries. The EPlusLink queries provide data for individual projects and beneficiaries and the Word templates contain articles of the grant agreements. The combination of the two provides individual grant agreements for beneficiaries – data from EPlusLink queries is injected in pre-defined fields in the templates, creating one set of documents per project.

3. USE OF THE EPLUSLINK QUERIES

EPlusLink queries, which can also be called views, can be found under Quick Reports, branch "2015 Grant Agreements". There are 38 queries to generate the complete set of documents for KA1, KA2 and KA3 projects managed in EPlusLink.

The views can be filtered to the needs of the National Agency users. The filters can be applied for all fields. Some of them may be in particular interest of the National Agency users, such as ProjectCode, Call, ProjectStatus. These fields can be used to define a pool of projects for which the grant agreements should be created.

Majority of the views provide a single line of results per project. There are views, however, that provide more than one line per project. These views require some special attention because the way of use of them is different than the others. This will be defined in further paragraph of this document.

3.1. Typical way of using EPlusLink queries to generate grant agreements and grant agreement annexes

The Word templates and the EPlusLink queries were created for the purpose of mail merge function of Microsoft Word. The solution was tested with Microsoft Office 2010 suite and no guarantees are given for any other version of Microsoft Office, Microsoft Word, Microsoft Excel or any other software in particular.

The typical and default way of using the templates with EPlusLink queries involves the following steps:

(1) Export of data from EPlusLink to Excel file

(2) Opening of the Word templates

(3) Using mail merge function to input the data and generate the documents

The 3 steps is a general and default way of using the solution. For some queries and templates, EPlusLink offers "Document Merge" function. These queries have to produce one line per project, however. The table below lists queries that can be used with EPlusLink Document Merge and those which require the combination of Excel file + Word.

Query name	EPlusLink Document Merge	Export to Excel + mail merge in Word
2015_MonoBeneficiaryAgreement		X
2015_MultiBeneficiaryAgreement		X
2015_MultiBeneficiaryAgreement_ListOfBeneficiaries		X
2015_KA101_ANNEX_I_II	X	
2015_KA102_ANNEX_I	X	
2015_KA102_ANNEX_II	X	
2015_KA102_ANNEX_II_Travel	X	
2015_KA102_ANNEX_II_SpecialNeedsSupport	X	
2015_KA102_ANNEX_II_LinguisticSupport	X	
2015_KA102_ANNEX_II_IndividualSupport	X	
2015_KA102_ANNEX_II_ExceptionalCosts	X	

Query name	EPlusLink Document Merge	Export to Excel + mail merge in Word
2015_KA103_ANNEX_I	X	
2015_KA103_ANNEX_II_1	X	
2015_KA103_ANNEX_II_2	X	
2015_KA104_ANNEX_I	X	
2015_KA104_ANNEX_II	X	
2015_KA105_ANNEX_I	X	
2015_KA105_ANNEX_II	X	
2015_KA105_ANNEX_II_ExceptionalCosts	X	
2015_KA105_ANNEX_II_IndividualSupport	X	
2015_KA105_ANNEX_II_LingusticSupport	X	
2015_KA105_ANNEX_II_OrganisationalSupport	X	
2015_KA105_ANNEX_II_SpecialNeedsSupport	X	
2015_KA105_ANNEX_II_Travel	X	
2015_KA107_ANNEX_I_ActivityDetails		X
2015_KA107_ANNEX_I_ProjectDescription		X
2015_KA107_ANNEX_II_BudgetSummaryPerCountry		X
2015_KA107_ANNEX_II_BudgetSummary	X	
2015_KA2_ANNEX_I_IO_ME_LTT	X	
2015_KA2_ANNEX_IA_IntellectualOutPuts		X
2015_KA2_ANNEX_IB_MutliplierEvents		X
2015_KA2_ANNEX_II	X	
2015_KA347_ANNEX_I	X	
2015_KA347_ANNEX_II	X	
2015_KA347_ANNEX_II_Travel	X	
2015_KA347_ANNEX_II_SpecialNeedsSupport	X	
2015_KA347_ANNEX_II_OrganisationalSupport	X	
2015_KA347_ANNEX_II_ExceptionalCosts	X	

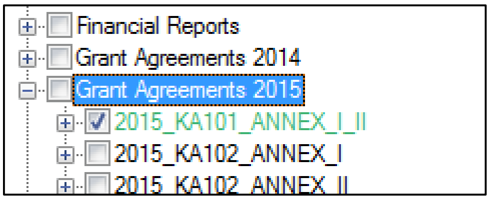
By default, if EPlusLink Document Merge does not provide satisfactory results, users should consider using the Word mail merge option as a fall-back solution.

3.2. Detailed use of EPlusLink queries to generate grant agreement documents

To create grant agreements or grant agreement annexes using EPlusLink Document Merge function please follow the steps below. Make sure you have the Word templates readily available.

(1) Open EPlusLink Quick Reports. Choose "Wizard Query Editor" if not selected by default. Go to "Wizard Query Editor" tab.

(2) Select the view you'd like to use to generate the documents. In this example we will use 2015_KA101_ANNEX_I_II to illustrate the process. Select the tick-box against the view name. The right-hand side panel will fill in with fields relevant for the selected view.



(3) Use filters to select the appropriate pool of projects. In this example we will use set call to "2015" and ProjectStatus to "Contract Signing".

(4) Run the query to check the results by either clicking on "Results" tab or using the "Next >" button.

(5) Return to "Wizard Query Editor". Save the query using "Load & Save Query" menu, option "Save the Query to the Database". Other options, such as saving on a local drive are also available. For this example we will save the queries in the database.

(6) Give the query a meaningful name, i.e. "KA101 Annex I and II". Click OK. A confirmation "The Query has been saved!" should appear on the screen.

(7) Choose Tools, Document Merge from the top EPlusLink menu.

(8) Go to "Merge Setup" tab.

(9) Select your "KA101 Annex I and II" query from the list of available queries on the left hand side drop-down list. The bottom pane will be filled in with the list of fields from the query. Below you will also find the filters used in the saved query.

(10) From the right hand side panel, click Browse button. Choose the correct file for your query, i.e. KA101 Annex I and Annex II.docx. As a result you should see "Exact match!" displayed in green in the lower part of the right pane. Some field, such as ProjectID, ProjectStatus, OwnerNA and few others will not be matched with fields in the Word template. You can ignore them. In case there are no fields displayed after loading the Word template, please check the Troubleshooting paragraph of this document.

(11) Click Next button. The "Merge result" screen will show you the result of your query. Under "5. Output options…" the default setting is set to "separate files".

(12) Click "7. Execute document merge creating separate files". You will be asked about location of the files. Choose a folder, bearing in mind that EPlusLink will create as many Word document as many lines were displayed in the results. Click OK. A confirmation will be displayed. If you wish you can open the location of the files.

(13) As a result, one or more files is crated in the location provided.

(14) Open individual files and check the completeness of the data. In some cases, the tables, especially the activity details tables will show some empty lines. The empty lines should be removed.

Activity Details

The following indicative activities will be implemented by the beneficiary

Activity type	Total number of participants	Total Duration (days)
	0	0
Structured Courses/Training Events	1	12
	0	0
Total	1	

3.3. Detailed use of EPlusLink queries, export to Excel and Word to generate grant agreement documents

For queries that produce more lines of results per project, the recommended approach is to use the Excel files and Word mail merge function. Due to certain technical limitation we suggest filtering the queries per project. As a result, the procedure will have to be repeated as many times as many grant agreements are there to generate.

(1) Open EPlusLink Quick Reports. Choose "Wizard Query Editor" if not selected by default. Go to "Wizard Query Editor" tab.

(2) Select the view you'd like to use to generate the documents. In this example we will use "II.2.6 – Multi-beneficiary grant agreement List of other beneficiaries - Annex VI" template with 2015_MultiBeneficiaryAgreement_ListOfBeneficiares query to illustrate the process. Select the tick-box against the view name. The right-hand side panel will fill in with fields relevant for the selected view.

(3) Use filters to select the appropriate pool of projects. In this example we will use the AgreementNumber to choose a specific project.

(4) Run the query to check the results by either clicking on "Results" tab or using the "Next >" button.

(5) Click "Export to Excel". Provide location and name of the file. A confirmation will be displayed. You may want to open the file to check the correctness of the data.

(6) Minimize EPlusLink and open the relevant Word template in Word application.

(7) Choose "Mailings" from the top menu. Then select "Directory" from "Start Mail Merge".

(8) Click "Select Recipients", choose option "Use Existing list". Point to the Excel file exported in point 5. Click OK and confirm the selection of the Excel sheet.

(9) By default, all fields should be already mapped. You may want to click on "Preview Results" to see the individual results.

(10) Click "Finish & Merge" and "Edit Individual Documents". Select "All records".

(11) A new document will be opened with result of the merge.

4. TROUBLESHOOTING

4.1. Default use of EPlusLink queries with mail merge – a fall-back scenario

In case the Word template fields are not correctly recognised, the recommended solution is to use the default combination of EPlusLink queries with export to Excel and mail merge function in Word. This method should also be used for the main parts of the documents – the mono- and multi-beneficiary agreements.

(1) Open EPlusLink Quick Reports. Choose "Wizard Query Editor" if not selected by default. Go to "Wizard Query Editor" tab.

(2) Select the view you'd like to use to generate the documents. In this example we will use "2015_MonoBeneficiaryAgreement" to illustrate the process. Select the tick-box against the view name. The right-hand side panel will fill in with fields relevant for the selected view.

(3) Use filters to select the appropriate pool of projects. In this example we will use the ProjectStatus, ActionTypeCode and Call to specify the group of projects for generation of the grant agreements.

(4) Run the query to check the results by either clicking on "Results" tab or using the "Next >" button.

(5) Click "Export to Excel". Provide location and name of the file. A confirmation will be displayed. You may want to open the file to check the correctness of the data.

(6) Minimize EPlusLink and open the relevant Word template in Word application.

(7) Choose "Mailings" from the top menu. Then select "Letters" from "Start Mail Merge".

(8) Click "Select Recipients", choose option "Use Existing list". Point to the Excel file exported in point 5. Click OK and confirm the selection of the Excel sheet.

(9) By default, all fields should be already mapped. You may want to click on "Preview Results" to see the individual results.

(10) Click "Finish & Merge" and "Edit Individual Documents". Select "All records".

(11) A new document will be opened with result of the merge. The individual documents will be merged together with others one after another.

4.2. EPlusLink is not showing any fields in the Document Merge tool

In case EPlusLink does not recognise the fields for injection of data from the loaded templates, two solutions can be applied – either use of the fall-back scenario of using the mail merge Word option or fixing the actual Word template. The first option has been described in the previous paragraph.

The second option includes the following steps:

(1) Open the template in which EPlusLink did not recognise the fields. The fields used by EPlusLink are usually marked with chevrons, i.e. «ApplicantNameInLocalCharacterSet» and are marked in light grey when being selected.

(2) Right click the field, choose "Edit Field".

(3) Without making any changes in the setting click OK.

(4) Repeat points 2 and 3 for every single field in the document.

5. SUPPORT

5.1. Escalation to IMT

Any issues concerning use of the Word templates or the Quick Reports in EPlusLink should be reported to the EAC Business Helpdesk via IMT.

5.2. How to manually add fields to Word documents that can be used by EPlusLink to fill in data?

In case there is a need to complement the set of fields in the pre-defined queries for Grant Agreements 2015 with some fields coming from other queries, the Word template need to be adapted.

In order to add a new field, please go to menu Insert in Word and choose option Quick Parts, then Field. Locate MergeField on the list, give the new field the same name as the name in EPlusLink and click OK. This will add a new field to the Word template and allow EPlusLink to map the field with the field from the query.