

Contract Follow Up - QUICK TOUR

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WHY CFU?

With the ongoing implementation of the LHC and past experience with building the LEP, the need for CERN to use a comprehensive Contracts Follow Up software for managing CERN Purchase Procedures is fully acknowledged and has indeed become critical.

To answer those needs, CFU, has designed and implemented by [AIS](#).

The main objectives for using wide a CFU software CERN wide are:

- to allow all divisions, services involved in a contract to share and exploit comprehensive and coherent data at all stages in a contract's life;
- to allow the monitoring a contract lifecycle, from the initial divisional request to the contract post-mortem;
- to provide to budget holders a comprehensive view of all financial data related to the contract;
- to ease the flow of communication of contract related data between all services and divisions involved;
- to provide easy access to all documents related to a contract;
- to help all parties involved to follow contract related procedures;

CERN — European Laboratory for Particle Physics

CFU

CERN Contracts Follow Up

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BASIC CONCEPTS

Purchase procedures is a global term to refer to all procedures undertaken within CERN, either by the divisions themselves or by the Purchasing Services, in order to purchase goods or services from outside CERN.

Purchase procedures include:

- **Divisional requests**
- **Market Surveys**
- **Price Enquiries**
- **Invitations to Tender**
- **Big Orders** (≥ 100000 CHF)
- **Contracts**

All purchase procedures follow pre-defined **steps**. As an example, a Market Survey is first created, then dispatched to the suppliers etc .. CFU keeps track of all dated steps for a complete monitoring of the Purchase Procedure history.

During the lifecycle of a purchase procedure, a number of persons play on or several **roles**. Examples of these roles are the technical and commercial responsables of a market survey, a contract manager etc ...

TUOVI is the Web Document Management Server component of CFU.

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Query view on Purchase Procedure Links

DR Reference	DR Short description	MS Reference	MS Short Description	IT/PE Reference	IT/PE Short Description
▶ DR-000320IT	DESKTOP MACS PURCHASE+MAINT.	▶ MS-27250IT	DESKTOP MACS PURCHASE+MAINT.		
▶ DR-000340ITCS-IN-PM	INTERNAL NETWORKS MAINTENANCE	▶ MS-27000IT	NETWORK FIRST LINE SUPPORT		
▶ DR-000350ITDBH-LINES	EXTERNAL LINES TO THE USA	▶ MS-27240IT	EXTERNAL LINES TO THE USA		
▶ DR-000420ST	STATIC VAR COMPENSATOR	▶ MS-27380ST	STATIC VAR COMPENSATOR		
▶ DR-000430ST	SUPPLY POWER TRANSFORMERS	▶ MS-27450ST	POWER TRANSFORMERS		
▶ DR-80902/LHC/LHC	CONTROL SYSTEM	▶ MS-2628/LHC/LHC	CONTROL SYSTEM		
▶ DR-80904/LHC/LHC	CRYOSTATS FOR LHC SSS	▶ MS-2593/LHC/LHC	CRYOSTATS FOR LHC SSS		
▶ DR-80905/LHC/LHC	LHC CRYODIPOLES	▶ MS-2544/LHC/LHC	MAIN DIPOLE CRYOSTAT		
▶ DR-80906/LHC/LHC	LHC INTERCONNECTIONS	▶ MS-2630/LHC/LHC	BELLOWS EXPANSION JOINTS LHC		
▶ DR-80907/LHC/LHC	COLD MASSES FOR LHC DIPOLES	▶ MS-2325/LHC/AT	COLD MASS OF LHC	▶ IT-2325/LHC/LHC	COLD MASSES

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First Previous Next Last

Query

Organic roles

Validations

Validation Code	Comments	Created on
DL		26/04/1999
DL		26/04/1999
PL		05/05/1999

Type	Last Name	Firstname
DDL	PETRILLI	ACHILLE
DL	FERGUSON	JOHN
DPO	MANDICA	JEAN-DANIEL

Specific roles

Type	Last Name	Firstname
BUDGET	DAGRON	JEAN
COMM	ESTEVENY	LAURE
TECHNICAL	ROY	SERGE

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LOGIN AND ACCESS RIGHTS

Potentially, any user who holds an AIS account may access the CFU application, using one of the two browsers supported at CERN Netscape Navigator or Microsoft Internet Explorer (Versions 4 or higher) from a PC or a MacIntosh.

From your preferred browser enter cfu in the URL. If you have not yet logged in to AIS applications, you will be asked to do so and then will access the [CFU Desktop](#).

CFU data is NOT public and the data which you are entitled to query/enter or maintain is controlled and is a function of **who you are**, **which roles** you are holding, **what you are trying to do** and **which purchase procedure** you want to access.

The roles which you may hold are:

- **organic roles**, inherited from the Foundation database (mostly hierarchical role such as DL, DDL etc ..)
- **specific roles** for ione purchase procedure only (e.g. F249/PPE contract manager)

You may view your access rights from the main menu by clicking on Utilities/[View your access rights](#).

If you want your access rights to be modified please contact your divisional Purchase Office or spl.support@cern.ch.

View your access rights

User information

Please click on the link below to display the list of your access rights in the CFU application

Last Name	Specific rules	Organic rules
KLEM	Specific roles (1 Rows)	Organic roles (0 Rows)

Record 1 of 1

[ReQuery](#)

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QUERY AND UPDATE DATA

All modules of the CFU application work in the same way, using four different forms:

- a Query Form,
- a Record List,
- an Insert Form
- and a View Form

On each of this form, you will find a **Top navigation bar**. This bar gives you access to context related help, access to the startup page of the module or access to the View form of the parent information.

A **Query Form** is the first you encounter in a module. You put in selection criteria and press on the FIND button to get the results.

The **Clear** button will clear all selection criteria, whereas the **New** button will lead you to the Insert Form.

On date fields, please make sure you use the date format indicated DD/MM/YYYY.

A **Record List** displays the results of your query, previously entered in a Query Form. It presents a summary table. Clicking on the first column will take you to the Query Form for this information. Other links found in the table indicates how many rows exist for related information.

At the bottom of the record list, CFU displays the total number of records found as a result of your query. The

First and **Last** buttons allow you to navigate to the first and last records found.

The **Next** button will display the next set of records, usually displayed 10 by 10.

The **ReQuery** button will refresh the summary table by requerying the database again, using the same selection criteria.

The **INSERT form** allows you to enter new data. Fill in the fields and press the **Insert** button. The transaction will either succeed, which will be acknowledged by a Success message, or fail with an error message for you to take action.

For some of the fields which are required, three little dots ... indicate that a List Of Values is available. Click on ... to display the List of values and then click on the value of your choice which will bring you back to the INSERT form.

Click on the **Clear** button to get rid of any field data entered and start your insert from scratch again.

PP Header

[Help](#) [New Call for Tender or Price Enquiry](#)

Enter query criteria for PP Header

Reference:	<input type="text"/>
Type:	<input type="radio"/> Call for Tender <input type="radio"/> Price Enquiry
Short Description:	<input type="text"/>
Long Description:	<input type="text"/>
Estimated Amount :	<input type="text"/> to <input type="text"/> CHF
Conducted By:	<input type="text"/>
Created On:	<input type="text"/> to <input type="text"/>
Created By:	<input type="text"/>
Last Modified On:	<input type="text"/> to <input type="text"/>
Last Modified By:	<input type="text"/>



The **VIEW form** displays information which you can then update or delete. Update any field you like, possibly using List of Values and then click on the

Update button.

Click on the **Delete** button to suppress the record from the database. You will be asked for confirmation before CFU proceeds.

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Reference:
 Type: Call for Tender
 Price Enquiry
 Short Description:
 Long Description:
 Estimated Amount: CHF
 Delivery start date: MM/YYYY
 Delivery end date: MM/YYYY
 Conducted By:

[Related Documents](#)

Details:

PP Header

Starbaven

Item No	Type	Short Description	Estimated Amount (CHF)	Contract No	Flows	Delivery Dates	Breakdown	Goods/Services	Supplier
IT-7887/AS/LIS	Price Enquiry	NEW MACHINE	130000000	CBRN	None	01/1999 - 01/1999	Goods/Services	Goods/Services	Supplier
IT-7887/AS/LIS	Price Enquiry	NEW MACHINE	130000000	CBRN	None	01/1999 - 01/1999	Goods/Services	Goods/Services	Supplier
IT-7887/AS/LIS	Call for Tender	NEW MACHINE	130000000	CBRN	None	01/1999 - 01/1999	Goods/Services	Goods/Services	Supplier
IT-7887/AS/LIS	Call for Tender	NEW MACHINE	130000000	CBRN	None	01/1999 - 01/1999	Goods/Services	Goods/Services	Supplier
IT-7887/AS/LIS	Call for Tender	NEW MACHINE	130000000	CBRN	None	01/1999 - 01/1999	Goods/Services	Goods/Services	Supplier

Created On: 30/05/1999
 Created By: DAGRON
 Last Modified On: 30/05/1999
 Last Modified By: DAGRON

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DOCUMENT STORAGE & RETRIEVAL

One major requirement of Contracts Follow Up which CFU hopes to fill is the management of all documents related to Purchase Procedures, whether CERN official documents, emails or notes etc, to allow all parties involved to share access to these documents without resorting to paper copies.

CFU uses a Web Document Management Server called [TUOVI](#) to fulfill these requirements.

For each purchase procedure TUOVI displays a structure of folders which allow users to store, search and retrieve documents in the electronic format of their choice (.html, .pdf, .doc, .xls etc ..). CFU is tightly integrated with TUOVI and the appropriate structure of folders is created/modified dynamically, when a purchase procedure is created/modified in CFU.

To access documents stored in TUOVI, click on the **Related Documents** which appear in the CFU screens.

The confidentiality rules which govern access to TUOVI are directly inherited from CFU: If you have query access to a Market Survey in CFU, then you have read access to documents in TUOVI related to this Market Survey.

The screenshot displays the 'MS Header' section of the TUOVI interface. It includes a navigation menu with 'Help', 'Startpage', 'Documents', and 'Overview'. The main content area shows a form with the following fields:

- Reference: 42-7002/AS
- Estimated Amount: 100000000
- Short Description: NEW MACHINE DES
- Long Description: New machine for
- Needed from: 04/1999 MM/YY
- Needed to: MM/YY
- Planned date for IT/PE: 11/1999 MM/YY

Below the form, there is a 'Details' section with a small map icon. A navigation bar at the bottom of the page includes '1 - Before Dispatch' and a search box. The search results list various document types and statuses, such as 'MS-BD-IC: Internal correspondence', 'MS-BD-FC: Final correspondence', and 'MS-BD-ILC: ILO correspondence'. A 'HELP' icon is visible in the top right corner.

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UTILITIES

In addition to the screens which allow the entry and maintenance of Contracts Follow Up data, CFU offers you a number of utilities.

The [Report Navigator](#) gives you access to three types of reports:

- fixed, pre-formatted **standard reports** (e.g. Summary Results of Market Survey);
- **dynamic reports** (e.g. Valid divisional requests). For such reports, you may enter a variety of selection criteria and choose the information which you want to extract from CFU. The resulting report is a list which you may also transfer to excel to tailor the formatting to your taste;
- **email lists**. With these reports, you may easily send an email, from CFU, to all persons involved in a specific purchase procedure

[Mailmerge facilities](#) has been designed to allow the bulk sending of letters using CFU data and pre-defined templates, entirely from the Web. As an example, the Purchasing Services use mailmerge facilities (also known as Htmlprint) to print cover letters to all suppliers contacted for a Market Survey.

All utilities are available from the Utilities option of the [CFU main menu](#).

The screenshot displays the 'Contracts Follow Up Report Navigator' interface. The main menu on the left lists several report categories:

- CFU**
 - Divisional Requests Reports
 - Full details
 - DR Information
 - Active DRs
 - Market Surveys Reports
 - Crucial of Market Survey firms
 - Current status of Market Survey
 - Firms addresses on labels
 - Market Surveys and Firms
 - Market Surveys information
 - Active MSs
 - Invitation to Tenders Reports
 - Results of prior Market Survey
 - Opening of Commercial Enq
 - Firms on labels with sender P*
 - Firms on labels
 - List of Tender Firms
 - Firm label w. type of offer
 - Active ITs
 - Price Enquiry Reports
 - List of Firms
 - Active Price Enquiries
 - Firms addresses on labels
 - Summary
 - Summary with the results
 - Useful email Enq
 - All price*

The 'Report Navigator' section on the right explains that the navigator allows users to browse a menu of standard reports and run the report of their choice. It lists options: HTML pages, HTML page, PDF prompts as a PDF file, and the ability to directly transfer to Excel. A note states: 'Please note that the y you may only run the y'.

The 'Market Survey managers' section provides a list of persons holding a valid role for all Market Surveys, with options to view details or print. It includes a search box for 'Person name' and a 'Go' button.

The 'Active DRs' section shows a table of active divisional requests with columns for 'Firm', 'Reference', 'Status', 'Date', and 'Action'.

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HELP & SUPPORT

[Help](#)


In addition to this Quick tour, which gives you basic information on CFU, extensive help is available from each screen of the CFU application, from a **help link** on the top navigation bar. Please take the time to read this help.

Should you want to test CFU with dummy data before you actually work with it, a test and training version is available at [cfutest](#), which contains most of the CFU functionality.

If you have questions which the online help cannot answer, or if you are in doubt about which CERN procedures to apply, please contact your divisional Purchase Office, or if, they cannot help, spl.support@cern.ch.

If you have problems with the application CFU itself, do not hesitate to contact our [AIS help desk](#), either by telephone 799 33, or preferable by email to ais.support@cern.ch. Using email will allow you to describe your problem very precisely and will ensure a quick response and fix.

Contracts Follow Up Help

MS Header

- Complete the proposed fields (bold card % can be used excepted if the proposed field requires dates). More precise is the data entered quicker is the market survey retrieved. If nothing is entered and the 'Find' button is pressed, all market surveys available in the database will be retrieved.

Reference:	Using this field gives the quickest access to the information. Enter the complete market survey number. If not known type for instance, MS-xxxx at the market surveys with a reference starting with MS-xxx will be retrieved.
Short Description:	Give a short description of the market survey.
Needed from...to...	Use it to get market survey by selecting the starting date of this survey. If not precisely known, insert two approximate dates which will determine a period in which this survey started (DDMM/YYYY). No data entered in the first field means retrieve all from the origin to the date indicated in the second field. No data entered in the second field means retrieve all from the date entered in the first field to today.
Needed to...to...	The same as above but related to market surveys end dates (DDMM/YYYY).
Planned date for IEPE:	The same as above but related to scheduled date for the dispatch.