



MANUAL / USER GUIDE / HANDBOOK

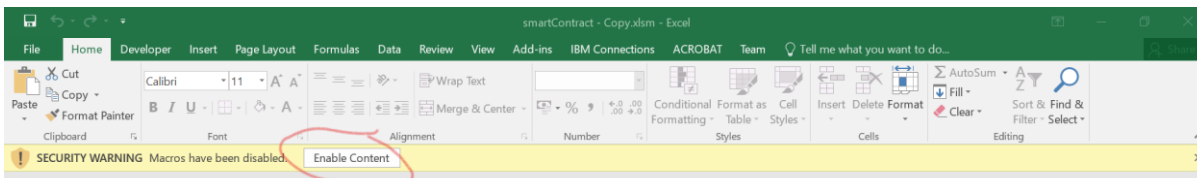
Manual For Smart Contract Tool of InCubed

V3.3

1 DISCOVER THE WORKBOOK

Open the workbook.

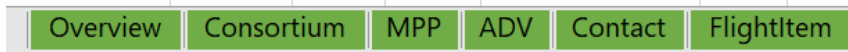
Make sure you enable the macros.



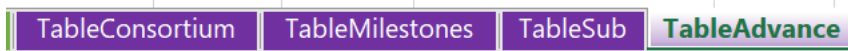
The smart contract tool will be prefilled with an example so you can look at the example to understand how it works.

The structure of the workbook is the following :

- The green sheets are the ones where you are supposed to fill relevant information



- The purple sheets are just a preview of some of the tables that will go into the contract. You don't have to do anything in those, they are just here for visualisation purposes and help you double check the data you filled in the green sheets.



Every cell that you have to manually fill will be coloured in light blue, i.e. this are some of the cells in the Overview sheet.

GENERAL		FILL IN THE CELLS WITH THE LIGHT BLUE BACKGROUND
ActivityName	Our awesome project	
Total Price in Euro	1,315,000	Sum of Consortium Price - fill Consortium sheet
Total Cost in Euro	2,430,000	Sum of Consortium Cost - fill Consortium sheet
Prime Name	Our Company	From Consortium sheet
Prime Country	IT	From Consortium sheet
Number of Phases	2	If contract is not phased enter 1. Maximum 2 phases with this tool.
Number of Subcos in Phase 1	1	Maximum 11 subcos with this tool
Number of Subcos in Phase 2	2	Maximum 11 subcos with this tool
Number of Milestones in Phase 1	2	Maximum 8 milestones with this tool, maximum two milestones per year.
Number of Milestones in Phase 2	5	Maximum 8 milestones with this tool, maximum two milestones per year.
Advance Foreseen in Phase 1	Yes	From Consortium sheet
Advance Foreseen in Phase 2	Yes	From Consortium sheet
Expected Contract Signature	01/05/2022	It should be later than today
Final Delivery Date	18/12/2023	4 weeks before final milestone - fill milestone sheet
End of Contract	15/01/2024	Latest milestone in the MPP - fill MPP sheet
Covid Pandemic On-Going	no	please check if conditions are still applicable here
Agree to use digital signatures	yes	

The blue cells will change dynamically depending on your inputs. Please note that the workbook is protected, hence you will not be able to click and edit cells that you should not fill.

Once the overview sheet is properly filled in, you will also find light red cells in the other green sheets. These are the cells where you need to copy/paste data from the Full Proposal. See Section 2 for further details.

Phase 1 ⓘ ← Click to Show/Hide instructions

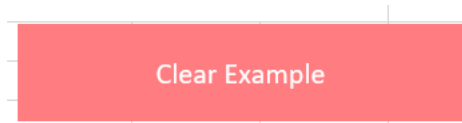
Entity	Country (ISO Code)	Role	Cost in Euro	Price in Euro	Advance Requested
Our Company	IT	Prime	1,000,000	500,000	Yes
Subco 1	AT	Subco	50,000	25,000	Yes

Light red cells: copy/paste from Full Proposal

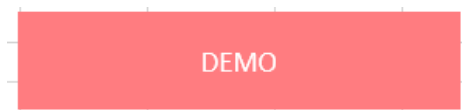
Light blue cells: fill manually in the Smart Contract Tool

2 FILL THE WORKBOOK

Once you have familiarised yourself with the notebook you can click on the red button “Clear Example” on the Overview tab. Always do that before starting to compile the Smart Contract Tool.



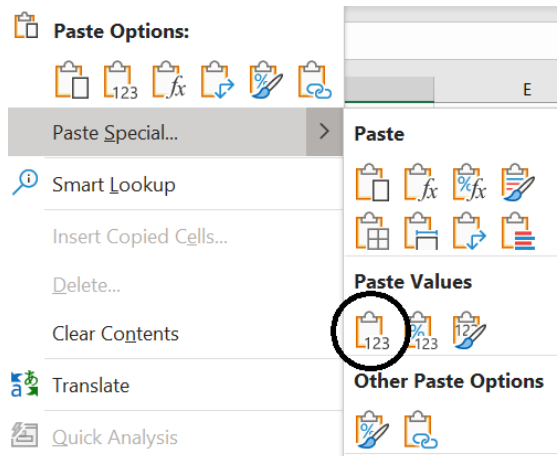
This will completely clear the example. Be aware that this cannot be undone. If for any reason you want to recreate the example, you can do so by click on the button “DEMO”. Be aware doing so you will delete all the data in the workbook and this operation cannot be undone.



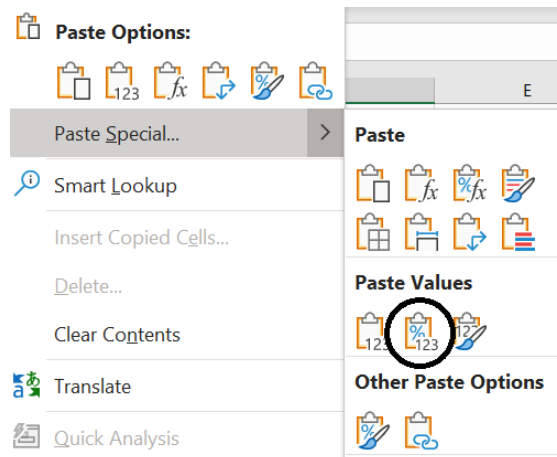
Once you cleared the example, you can then proceed to fill all the blue cells on the green tabs following the instructions in light grey.

GENERAL		FILL IN THE CELLS WITH THE LIGHT BLUE BACKGROUND	
ActivityName	Our awesome project		
Total Price in Euro	1,315,000	Sum of Consortium Price - fill Consortium sheet	
Total Cost in Euro	2,430,000	Sum of Consortium Cost - fill Consortium sheet	
Prime Name	Our Company	From Consortium sheet	
Prime Country	IT	From Consortium sheet	
Number of Phases	2	If contract is not phased enter 1. Maximum 2 phases with this tool.	
Number of Subcos in Phase 1	1	Maximum 11 subcos with this tool	
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End of Contract	15/01/2024	Latest milestone in the MPP - fill MPP sheet	
Covid Pandemic On-Going	no	please check if conditions are still applicable	here
Agree to use digital signatures	yes		

Once you completed the Overview sheet, move to the other sheets and fill in the required information. Based on the value that you inserted in the Overview sheet, the Tool will highlight in light red the cells where you need to copy/paste the data from the Full Proposal. When pasting, **always use the Paste Special -> Values** option.



The only exception is in the **ADV sheet**, where **you must use the Paste Special -> Values & Number Formatting** option.



In case of doubt, each sheet has info buttons for each table that you can click to get specific instructions.



Note that in the Consortium Sheet you are requested to specify if an advance payment is requested by each partner of the consortium. **You must list the subcontractors by indicating first those who require an advance payment, if any, then those who do not.**

Entity	Country (ISO Code)	Role	Cost in Euro	Price in Euro	Advance Requested
Our Company	IT	Prime	1,000,000	600,000	Yes
Subco 1	AT	Subco	200,000	100,000	Yes
Subco 2	DE	Subco	180,000	90,000	No

When you have filled everything, make sure that you're happy with all the information given. You can also check the automatically generated tables in the purple sheets to have a preview of the tables that will be inserted in the contract.

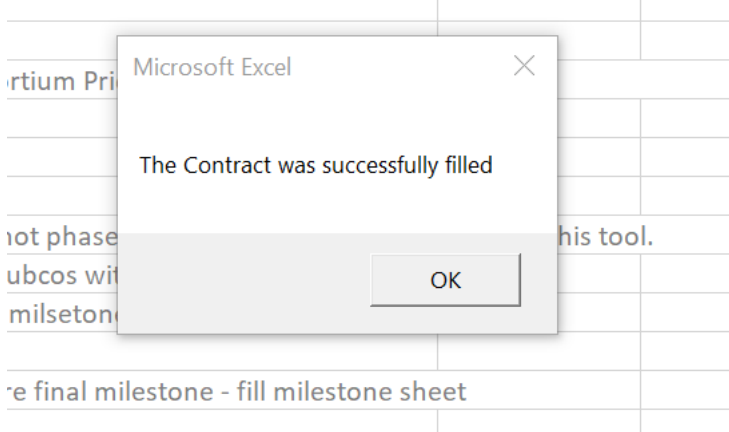
3 FILL THE CONTRACT

Make sure that you have no word document open, and that the word application is closed before clicking.

Click on the grey button "Fill Contract" on the Overview tab



and wait for a few seconds, a success message should appear on your screen



The contract has now appeared in the same folder as the excel workbook.

200730 4000xxxxx.docx	30/07/2020 13:15	Microsoft Word Doc...	405 KB
smartContract.xlsm	30/07/2020 12:54	Microsoft Excel Macr...	467 KB

You can read through it and pass it on to your legal department. Note that this contract is standard and should only be modified by changing the options on the workbook.

4 ADDITIONAL INFORMATION

NOTE : It is possible that the tool has bugs. If you ever get an error message on your screen or an unexpected result, please take a screenshot and save it. In case of error, please also click on Debug and take a screenshot of your screen with the part highlighted in yellow and save it.

Send an email with the bugged workbook and the screenshots attached, together with any useful information, to daniele.romagnoli@ext.esa.int with incubed@esa.int in copy.