

Change Request

Päivi Jaring – ITEA Programme Co-ordinator

Contents

- What is a change request?
- Process for making a change request
- Change request evaluation process
- Tips for successfull change request preparation
- FAQ

What is a Change Request?

Several changes might occur after a project is labelled and during the whole project lifetime. Changes in a project needs to be reported via a Change Request (**CR**)

A CR is a formal way of proposing and communicating changes in a labelled project, such as:

- New partners / withdrawing partners
- Revised planned effort figures as a result of national funding decision
- Changes in the work package (WP) content
- New project start / end dates

A Change Request is the **only** official way to communicate any changes in the project to the ITEA Office and a guarantee that they are processed.



Change Request

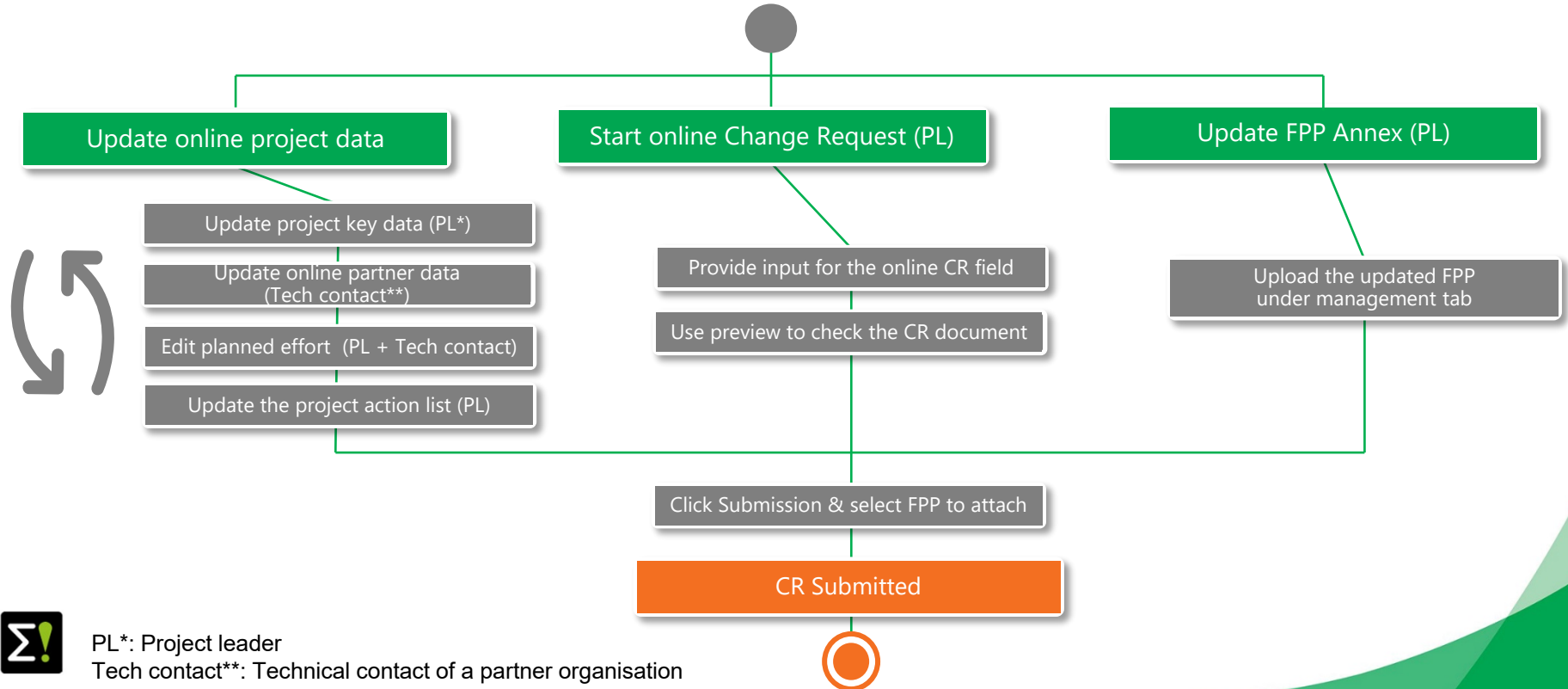
An online process

- The CR form is entered fully online:
 - Data (e.g. effort, partners, WP leaders,...) can be changed via the Community website by the Project leader (PL) and the WP leaders. Partners can only update their own data.
 - As soon as all checks are successful, a button “Start Change Request” will appear. This will lead you to a new page where additional information needs to be filled in (e.g. reason, impact, solution).
 - If the FPP is adapted, **you need to upload the new FPP Annex (not the merged file)** under Management tab (Management ->Project management).
 - Once all checks in the CR checklist are successful you can submit the CR.
- The CR process can be initiated and submitted only by a (proxy) PL
- Make sure to adapt the FPP in line with changes indicated on the CR form
- The evaluation of the submitted CR will only be done by an ITEA Programme coordinator or ITEA Steering Group (STG) reviewers depending on the scale of changes.
- Public Authorities are informed about the receival and approval of a CR and have access to the CR

Change Request

Steps to follow

CR submission consists of 3 parallel processes



Online project data (on the ITEA portal) which will be merged to the FPP should be updated to reflect the changes in the project

- PL should update the project key data (start & end date) and WP information.
- Each technical contact is responsible to update their organisation information (Role in the project, Effort etc.)
- PL should be aware of the rationale behind effort changes of partners
- PL must update the Project action list under management tab if there were any mandatory actions due by this change request.

Change Request

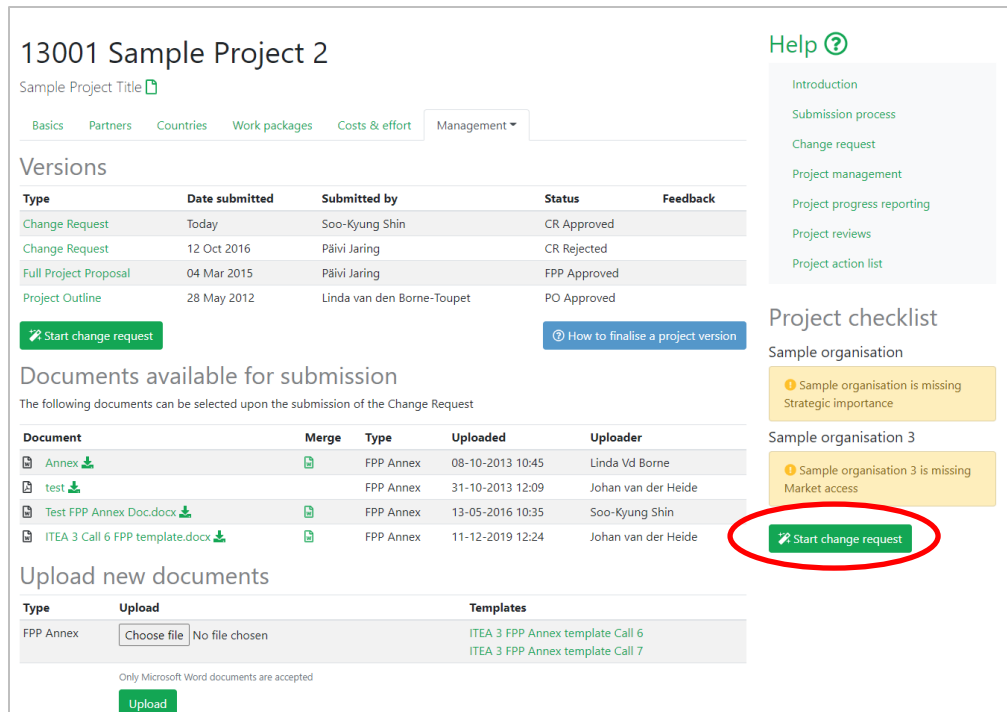
Start online Change Request

- Online CR can be initiated by Clicking “Start change request”-button on the right bottom of the project page
- This “Start change request”-button is hidden if there are any **red flags** under the Project checklist.


Eg: Project checklist

Country

⚠ Missing **rationale** for public funding in Belgium



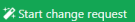

13001 Sample Project 2

Sample Project Title 

Basics Partners Countries Work packages Costs & effort Management ▾












Versions

Type	Date submitted	Submitted by	Status	Feedback
Change Request	Today	Soo-Kyung Shin	CR Approved	
Change Request	12 Oct 2016	Päivi Jaring	CR Rejected	
Full Project Proposal	04 Mar 2015	Päivi Jaring	FPP Approved	
Project Outline	28 May 2012	Linda van den Borne-Toupet	PO Approved	

Documents available for submission


The following documents can be selected upon the submission of the Change Request

Document	Merge	Type	Uploaded	Uploader
 Annex 		FPP Annex	08-10-2013 10:45	Linda Vd Borne
 test 		FPP Annex	31-10-2013 12:09	Johan van der Heide
 Test FPP Annex Doc.docx 		FPP Annex	13-05-2016 10:35	Soo-Kyung Shin
 ITEA 3 Call 6 FPP template.docx 		FPP Annex	11-12-2019 12:24	Johan van der Heide

Upload new documents

Type	Upload	Templates
FPP Annex	<input type="text" value="Choose file"/> No file chosen	ITEA 3 FPP Annex template Call 6 ITEA 3 FPP Annex template Call 7

Only Microsoft Word documents are accepted



Help

- Introduction
- Submission process
- Change request
- Project management
- Project progress reporting
- Project reviews
- Project action list

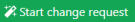
Project checklist

Sample organisation

⚠ Sample organisation is missing Strategic importance

Sample organisation 3

⚠ Sample organisation 3 is missing Market access



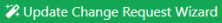
Change Request


Online Change Request

Community / Projects / 13001 Sample Project 2 / Management / Change Request in 13001 Sample Project 2




Change Request 13001 Sample Project 2 has successfully been started

Minor Change Request

 **(2) Use Wizard mode to work on CR step by step**

Below is the overview of the Change Request. You can either update the Change Request using the Wizard or directly update the information in the buttons in this overview. 

General information

Type	Minor
Project	13001 Sample Project 2 
Project leader	Jo-Kyung Shin 
Organisation	ITEA Office
Contact	Jo-Kyung Shin 
Date created	Today 15:13
Last update	Today 15:13

(1) Scroll down to fill in the online CR form

1. Change Request information

	Before Change Request	After Change Request
Start date	01-02-2016	01-02-2016
End date	31-12-2020	31-12-2020
Effort [RX]	17.00	17.00

Change request

- Draft and official documents
- Right timing for the submission of a CR
- Update online project information
- Update the FPP
- Start / Update the CR
- Submit the CR
- Review process
- ITEA Change request (video)

- Once you start a CR, you will see the online CR page with a full list of fields you need to fill in to submit the CR.
- You can either scroll down and provide all input here (1)
- Or, use the Wizard mode to provide the input step by step (2)
- This CR page is intended to collect information to generate a CR document from the ITEA portal

Change Request

Online Change Request

2/8



Online CR page consists of four sections (described in more detail in the following slides):

- 1) CR information,
- 2) Reasons, impact and solution of changes,
- 3) General information, and
- 4) Feedback to the previous STG evaluation



Change Request

Online Change Request

3/8



(1) CR information:

Check if the project start & end dates have been updated correctly.

Indicate the total number of milestones and deliverables in the project after this CR

1. Change Request information		
	Before Change Request	After Change Request
Start date	01-02-2016	01-02-2016
End date	31-12-2020	31-12-2020
Effort [RXX]	17.00	19.00
Costs [k€]	900.00	900.00
Number of partners	5	5
Amount of milestones		0 Edit
Amount of deliverables		0 Edit
	With reference to the first ever submitted FPP	With respect to the updated FPP
Delay (+) or advance (-) in months on the end date	27	0



Change Request

Online Change Request

4/8



(2) Reasons, impact and solution of changes:

- 2.1 National funding related changes: if project partner's costs and effort have been updated to reflect the national funding decision, click the country and provide the relevant information.
- Countries with the changes in costs and effort are red flagged, which is also visible under the Checklist on the right side of the CR page. To submit the CR, input for the red flagged countries must be provided.
- For project changes that are irrelevant with national funding, create a non funding related change under 2.2 for each item.

FPP		FPP	
Delay (+) or advance (-) in months on the end date	27		0

2. Reasons, impact and solution of changes

2.1. National funding related changes [Update](#)

Country	Type	Costs previous version [k€]	Updated costs [k€]	Effort previous version [PY]	Updated effort [PY]
2.1.1 Belgium	Active	300.00	300.00	3.00	6.00
2.1.2 France	Active	300.00	300.00	3.00	3.00
2.1.3 Netherlands	Active	300.00	300.00	11.00	10.00

2.2. Non funding related changes [Update](#)

[+ Create non funding related change](#)

evaluation

Netherlands

ITEA Office has no explanation for the change in the effort, from 10 to 9 PY

Belgium

Jield BV has no explanation for the change in the effort, from 1 to 4 PY

Belgium has no explanation for the change in the effort, from 3 to 6 PY



Change Request

Online Change Request


5/8




- (3) General information: provide a summary of the changes in this CR and the general impact of them to the project.
- (4) Feedback to the previous STG evaluation: if there is any feedback to the previous STG evaluation which is too long to be included to the “Project action list”-comment section, provide a longer textual feedback here

3. General information

3.1. Summary of Change Request

 Please provide this information. The information is required before submission of the Change Request

3.2. General impact

 Please provide this information. The information is required before submission of the Change Request

4.1. Additional information provided by the Project Leader

4. Feedback to the previous STG evaluation

2 non-blocking issue(s) are found in the general project checklist. It is recommended to solve these issues before submission of the Change Request

 Preview Change Request document

 Submit Change Request



Change Request

Online Change Request


6/8




In case the CR includes dramatic changes in the consortium (more than 40% reduction in total project effort), additional fields will appear on the CR page to ask the new ambition and innovation of the project.

3. Extra questions (required for major Change Request)


3.1. What is the new ambition for the project?

 Please provide this information. The information is required before submission of the Change Request


3.2. Where will be the new innovation?

 Please provide this information. The information is required before submission of the Change Request

3.3. What could be the new impact on the market?

 Please provide this information. The information is required before submission of the Change Request

3.4. Why does the consortium remain legitimate to be able to reach the new ambition?

 Please provide this information. The information is required before submission of the Change Request



Change Request

Online Change Request

7/8



- If you use the Wizard mode, you can provide input to the CR page step by step with an extra guiding text.
- Click the blue “Back to overview”-button if you wish you to go back to the CR page overview.

Community / Projects / 13001 Sample Project 2 / Management / Change Request in 13001 Sample Project 2 / National funding related changes








Change Request Wizard

Step 3 of 9

This section is intended to provide an information on the changes that happened to the project **in relation to the national funding decision**. Please click the country with a red warning mark to provide detailed information on the changes that happened to the country's partners and its' impact and solution.

2. Reasons, impact and solution of changes

2.1. National funding related changes

Country	Type	Costs previous version [k€]	Updated costs [k€]	Effort previous version [PY]	Updated effort [PY]
2.1.1 Belgium  	Active	300.00	300.00	3.00	 6.00
2.1.2 France 	Active	300.00	300.00	3.00	3.00
2.1.3 Netherlands  	Active	300.00	300.00	11.00	 10.00

Previous

Next

Back to overview




Change Request

Online Change Request

You can leave the CR page without submitting it as ITEA systems keeps all the input you provided. You can come back to the CR page later and keep editing it until submission.

Community / Projects / 13001 Sample Project 2 / Management


13001 Sample Project 2


Sample Project Title 

Basics Partners Countries Work packages Costs & effort Management

Versions












Type	Date submitted	Submitted by	Status	Feedback
Change Request	Today	Soo-Kyung Shin	CR Approved	
Change Request	12 Oct 2016	Päivi Jaring	CR Rejected	
Full Project Proposal	04 Mar 2015	Päivi Jaring	FPP Approved	
Project Outline	28 May 2012	Linda van den Borne-Toupet	PO Approved	

 Update Change Request Wizard

 How to finalise a project version

Documents available for submission

The following documents can be selected upon the submission of the Change Request

Document	Merge	Type	Uploaded	Uploader
 Annex 		FPP Annex	08-10-2013 10:45	Linda Vd Borne
 test 		FPP Annex	31-10-2013 12:09	Johan van der Heide
 Test FPP Annex Doc.docx 		FPP Annex	13-05-2016 10:35	Soo-Kyung Shin
 ITEA 3 Call 6 FPP template.docx 		FPP Annex	11-12-2019 12:24	Johan van der Heide


Upload new documents

Help


- Introduction
- Submission process
- Change request
- Project management
- Project progress reporting
- Project reviews
- Project action list


Project checklist

Sample organisation

 Sample organisation is missing
Strategic importance

Sample organisation 3

 Sample organisation 3 is missing
Market access

 Update Change Request Wizard



Change Request

CR submission

- Once all checklists in the CR are handled, you can submit the CR
- Use Preview-function to check the auto generated CR document
- Click “Submit Change Request” if you are ready to submit

[+ Create non funding related change](#)

3. General information [Edit](#)

3.1. Summary of Change Request

Summary

3.2. General impact

IMPACT

4. Additional information

4.2. Additional information provided by the Project Leader [Edit](#)

Extra

5. Feedback to the previous STG evaluation [Edit](#)

Feedback

2 non-blocking issue(s) are found in the general project checklist. It is recommended to solve these issues before submission of the Change Request

[Preview Change Request document](#) [Submit Change Request](#)

Change Request

CR submission

2/3



After Clicking the submit button, you are going to be directed to the page where you can select the updated FPP

Community / Projects / 13001 Sample Project 2 / Management / Change Request in 13001 Sample Project 2 / Submit Change Request

Change Request Wizard

Step 9 of 9

Select the latest version of FPP that you are going to submit together with the Change Request

Submit Change Request

For the Change Request formation, the following documents types are required:

- FPP Annex

Version documents

☐ Document: Annex (FPP Annex)
☐ Document: test (FPP Annex)
☐ Document: Test FPP Annex Doc.docx (FPP Annex)
☐ Document: ITEA 3 Call 6 FPP template.docx (FPP Annex)
Select version documents

Previous

Submit Change Request

Preview Change Request document

Back to overview

Checklist

All checks passed

Project checklist

Sample organisation

Sample organisation is missing Strategic importance

Sample organisation 3

Sample organisation 3 is missing Market access



Change Request

Update FPP Annex

13001 Sample Project 2

Sample Project Title

Basics Partners Countries Work packages Costs & effort Management

Versions

Type	Date submitted	Submitted by	Status	Feedback
Change Request	Today	Soo-Kyung Shin	CR Approved	
Change Request	12 Oct 2016	Päivi Jaring	CR Rejected	
Full Project Proposal	04 Mar 2015	Päivi Jaring	FPP Approved	
Project Outline	28 May 2012	Linda van den Borne-Toupet	PO Approved	

Update Change Request Wizard

How to finalise a project version

Documents available for submission

The following documents can be selected upon the submission of the Change Request

Document	Merge	Type	Uploaded	Uploader
Annex		FPP Annex	08-10-2013 10:45	Linda Vd Borne
test		FPP Annex	31-10-2013 12:09	Johan van der Heide
Test FPP Annex Doc.docx		FPP Annex	13-05-2016 10:35	Soo-Kyung Shin
ITEA 3 Call 6 FPP template.docx		FPP Annex	11-12-2010 12:24	Johan van der Heide

Upload new documents

Type	Upload	Templates
FPP Annex	<input type="button" value="Choose file"/> No file chosen	ITEA 3 FPP Annex template Call 6 ITEA 3 FPP Annex template Call 7

Only Microsoft Word documents are accepted

Upload


- If the changes in the project has an impact on the FPP, the FPP Annex must be updated and uploaded under the management tab of the project webpage. (In case you did not need to update the FPP Annex, you can upload the previous version again.)
- Please note that you need to update **unmerged** FPP Annex. This new FPP annex will be merged with updated online project data by the ITEA Office after the CR submission

Once the CR is submitted you will see the below message

Community / Projects / 13001 Sample Project 2 / Change Request




Change Request for 13001 Sample Project 2 has successfully been submitted

Change Request of 13001 Sample Project 2

Sample Project Title 

General information Documents Country Costs Effort Action

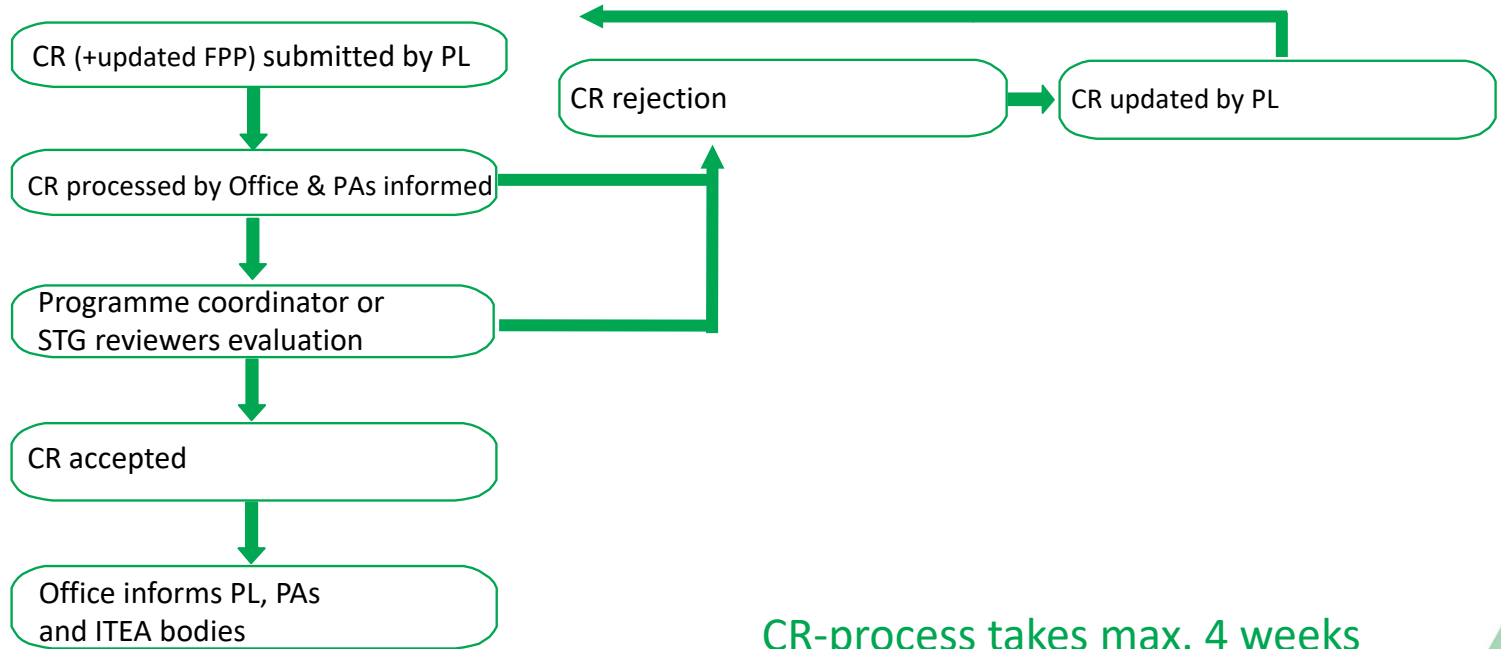
Version details

Project name	13001 Sample Project 2 
Project leader	Soo-Kyung Shin  
Call	ITEA 3 Call 1
Start date	01 Feb 2016
End date	31 Dec 2020 (59 months)
Version type	Change Request (cr)
Status	CR Decision Pending Change Request Process
Change Request Proc...	Process
Resolution date	Not reviewed yet
Date submitted	22-10-2020
Date cancelled	Version is active



Change Request

CR evaluation process



CR-process takes max. 4 weeks

- Take into account the feedback from the STG reviewers from the previous evaluation(s)
- Make sure that the online information (online CR page, updated project information) and the updated FPP Annex are consistent

- When is the right time to submit a CR?
 - Answer: right time to submit a CR is as changes have occurred in the project that require making a CR, but the project is not expecting more changes soon.
- A partner left the project, but it does not appear under the deactivated partners' table
 - Answer: If some partner has worked for the project (i.e. it has costs and effort from the past years), it cannot be deactivated even if it has left the project
- Why can't I update the costs?
 - Answer: only the ITEA Office can change costs of the past years, so in case it is necessary, pls contact ITEA Office

Thanks for your attention!