Change Request

Preparation Guidelines & Template

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**Foreword**

A Change Request (CR) must be issued by the Project Leader (PL) or by a person explicitly appointed by him/her.

**Make sure that you are using the latest version of the CR Guidelines &Template**: check it on the Documents & Templates area of the ITEA 2 Community website and, whenever needed, discard obsolete versions you might have stored and download the up-to-date one.

These Guidelines describe how to submit a CR using the ITEA 2 Community website <http://community.itea2.org>

*A detailed how-to document can be downloaded from* [*http://www.itea2.org/call\_documents*](http://www.itea2.org/call_documents).

*Note:* For projects that have not used the ITEA 2 Community website to submit their project (Call 2-5) and would still want to use the traditional CR submission process, all references in these guidelines to updating the FPP via the ITEA 2 Community website can be read as updating the traditional FPP. The ITEA 2 Office offers otherwise its full support to projects accepting the transition towards submitting a CR via the ITEA 2 Community website.

In order to submit a CR via the ITEA 2 Community website:

* Edit/complement all online project information (project basics, costs & effort, partners, workpackages, etc.) where necessary
* Update the Joint PO-FPP Annex document (see further details page 8)
* Fill in the CR document
* Upload the Annex documents(with and without Track Changes)
* Upload the CR document
* Create a change request version via the ‘Project Management’ tab
* Submit the CR version

In case a project is abandoned (e.g. lack of public funding for most partners) it is sufficient that the PL provides the CR form with a short explanation of the reason why the project is abandoned.

The CR Template starts on the next page; it contains comments and hints (*all in italic text*) intended to help you to prepare a successful CR proposal; we recommend you to delete them in the submitted CR.

**Recommendation:**

For the first CR of this Project, carefully check the FPP evaluations from ITEA 2 and Public Authorities and document how the various requests or recommendations are being implemented.

If at least one review has taken place, also check the various reports received after the latest review (e.g. Conclusions & Actions, STG reviewers report and External Expert report) and take opportunity of this CR to describe the implementation of the various actions and recommendations made there.

Change Request (CR)

<ACRONYM> or <PROJECT NAME>

<Full Project name>

••••••••••••••••••••••••••••••••••••••••••••••••••••••

Project number: ITEA 2 <######>*(use the number given by the ITEA 2 Office)*

CR editor: <name>

Date <date>

## Application Domains and Technologies[[1]](#footnote-1)

*Revisit the Major and minor Application Domains and Technologies indicated in the FPP being updated and reassess and update them whenever relevant (on the ITEA 2 Community website).*

|  |  |
| --- | --- |
|  | (✔)[[2]](#footnote-2) |
| Major or minor Application Domains |  |
| Major or minor Technologies |  |

## Project Leader and Work Package Leaders

*Whenever relevant, update, in the ITEA 2 Community website, the name and data related to the Project Leader and to the Work Package Leaders.*

|  |  |
| --- | --- |
|  | (✔)2 |
| Project Leader[[3]](#footnote-3) |  |
| WP 1 Leader |  |
| WP 2 leader |  |
| … |  |

## 

## Start and end dates[[4]](#footnote-4)

*Update, whenever relevant, the start and end dates in the ITEA 2 Community website.*

|  |  |
| --- | --- |
|  | (✔)2 |
| Start date |  |
| End date |  |

***Indicate, in the following table, the main reasons making changes compulsory/intended, the main impact on the project and the corresponding proposed solution.***

|  |  |  |  |
| --- | --- | --- | --- |
| **Reasons** | | **Impact on the project** | **Proposed solution** |
| **A) Funding-related** | | | |
| **A-1) Not country-specific[[5]](#footnote-5)** | | | |
|  | |  |  |
|  | |  |  |
| **A-2) Country-specific[[6]](#footnote-6)** | | | |
| *<Country 1>* |  |  |  |
| *<Country 2>* |  |  |  |
| *<Country 3>* |  |  |  |
| *Etc …* |  |  |  |
| **B) Not funding-related[[7]](#footnote-7)** | | | |
|  | |  |  |
|  | |  |  |
|  | |  |  |

**Key data impacted in this Change Request**

|  |  |  |
| --- | --- | --- |
|  | Before Change Request (i.e. with reference to the FPP to be updated) | After Change Request (i.e. with reference to the updated FPP) |
| Start date |  |  |
| End date |  |  |
| Manpower (P\*Y) |  |  |
| Costs (k€) |  |  |
| Number of Partners |  |  |
| Number of Milestones |  |  |
| Number of Deliverables |  |  |
| Others |  |  |

|  |  |  |
| --- | --- | --- |
|  | With reference to the first ever submitted FPP | With reference to the updated FPP |
| Delay (+) or advance (-)  on the end date (months) |  |  |

**Partnership**

**Partners leaving[[8]](#footnote-8)**

|  |  |  |
| --- | --- | --- |
| Country | Full name of the partner | Type[[9]](#footnote-9) of organisation |
| <Country 1> | <Partner 1> |  |
| <Country 1> | <Partner 2> |  |
|  | Etc. |  |
| <Country 2> | Etc. |  |

**Partners joining[[10]](#footnote-10)**

|  |  |  |
| --- | --- | --- |
| Country | Full name of the partner | Type5 of organisation |
| <Country 1> | <Partner 1> |  |
| <Country 1> | <Partner 2> |  |
|  | Etc. |  |
| <Country 2> | Etc. |  |

**Partners working without funding[[11]](#footnote-11)**

|  |  |
| --- | --- |
| **Recapitulation** | |
| <Country 1> | <Partner A>  <Partner B>  etc. |
| <Country 2> | <Partner C>  <Partner D>  etc. |
| Etc |  |

**The proposed changes will have the following global impact on the project:**

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..................................................................................................................................................................

**Additional information[[12]](#footnote-12):***(please add enclosures if necessary)*

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## *Provision of an updated FPP Annex with revision marks*

## *Produce an updated FPP Annex (in MS-Word format) incorporating the detailed implementation of the above mentioned solution(s); the updated FPP Annex must enable to easily identify the changes made (suggestion: from the beginning on, set the ‘Track Change’ mode ON so that the updated parts of the FPP Annex are easy to identify, thanks to their revision marks).*

***Important Remark:***

*Should the FPP to be updated have been edited with a* ***now*** *out-dated template[[13]](#footnote-13), take the following steps:*

* *open the up-to-date FPP Guidelines / Template;*
* *set the* ***‘****Track Change****’*** *mode on OFF;*
* *import, one by one, the parts of your now obsolete FPP where they fit in the up-to-date Template;*
* ***from this step on*** *or should the FPP to be updated have been edited with a still up-to-date Template****, set the ‘Track Change’ mode on ON*** *so that (only) the text that is actually new appears with revision marks.*

**This part should not be filled in by the applicant**

**The change related to the project**

..................................................................................................................................................................

(name and identification number of the project)

**as proposed on**

..................................................................................................................................................................

(date)

**is considered to be minor/major according to the accepted criteria**

..................................................................................................................................................................(signature Programme Coordinator, date)

**In case of approval:**

..................................................................................................................................................................(Signature Chairman ITEA 2 STG, date)

..................................................................................................................................................................(Signature Chairman ITEA 2 Board, date)

**In case of rejection:**

This proposal has been rejected by Programme Co-ordinator / Steering Group / ITEA 2 Board for the following reason(s):

..................................................................................................................................................................

..................................................................................................................................................................

..................................................................................................................................................................

..................................................................................................................................................................

(name and signature Programme Co-ordinator / Chairman STG /

Chairman ITEA 2 Board, date)

1. ITEA Roadmap for Software-Intensive Systems and Services (3rd edition, February 2009) – <http://www.itea2.org/itea2_roadmap_3> [↑](#footnote-ref-1)
2. Just tick (✔) here when changed in the updated FPP. [↑](#footnote-ref-2)
3. In case the coordinating organisation registered in the current FPP has withdrawn (e.g. pursuant to a negative funding decision in its country and without having issued a CR accordingly), the process for appointing another coordinator is as follows: the remaining participants should first agree on a new coordinating organisation which, in turn, should appoint a coordinator; the latter should then send an email to the ITEA Programme Coordinators, copying each participant remaining in the consortium and the ITEA Office (i.e. info@itea2.org), indicating his/her role of Project Leader in the remaining consortium; the ITEA Office will then update the web site and access rights accordingly. [↑](#footnote-ref-3)
4. So that the final review meeting can be scheduled close enough to, and, when you prefer it, before, the end date, it is advisable to avoid having the end date within the summer holiday period (from mid-July to end of August) as well as in October where an ITEA & ARTEMIS Co-summit is usually scheduled. It is also advisable to schedule the end date having in mind that the costs generated by the participation to the ITEA & ARTEMIS Co-summit and to the Review are eligible towards the Public Authorities when they occur before the official end date. [↑](#footnote-ref-4)
5. e.g. Synchronisation: partners did not start at the same time because:

   - e.g. Submission deadlines were different in the various countries

   - e.g. National procedures did not take the same time [↑](#footnote-ref-5)
6. For each relevant country, be specific (see following examples):

   - e.g. Administrative or Procedural problems (e.g. if a university is the single partner in one country, it is not funded)

   - e.g. Strategic reason (e.g. technical content of the project does not fit into national R&D programmes)

   - e.g. Technical Reason (e.g. technical content estimated too weak in the country)

   - e.g. Application by project members came too late

   - e.g. Application by project members did not occur

   - e.g. Funding lower than expected [↑](#footnote-ref-6)
7. *- e.g.* ***Technical:*** *subject more difficult than expected, progresses slower than expected*

   *- e.g.* ***Marketing****: dramatic modification of the market since the last FPP submission* [↑](#footnote-ref-7)
8. In the ITEA 2 Community website, please de-activate partners that never started working in the project. For partners that have worked in the project but are now leaving, set the PY and k€ to zero in the columns of the current or upcoming years. [↑](#footnote-ref-8)
9. Please indicate “IFC” (for an ITEA 2 Founding Company) or “Large Company” (for a non-IFC but large company) or “SME” or “Research” (for a Research Institute) or “University” or “Governmental” (for a governmental organisation). [↑](#footnote-ref-9)
10. Please document the exact name of the joining Partners, their effort (PY) and financial budget (k€) in the ITEA 2 Community website. [↑](#footnote-ref-10)
11. In the ITEA 2 Community website, select the option ‘self-funded’ in the partner details. [↑](#footnote-ref-11)
12. Optional [↑](#footnote-ref-12)
13. See Foreword. [↑](#footnote-ref-13)