

Project Modifications

Guidance for LPs on how to request and process modifications to their projects on eMS

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Key:

LP action

JS action

Neutral

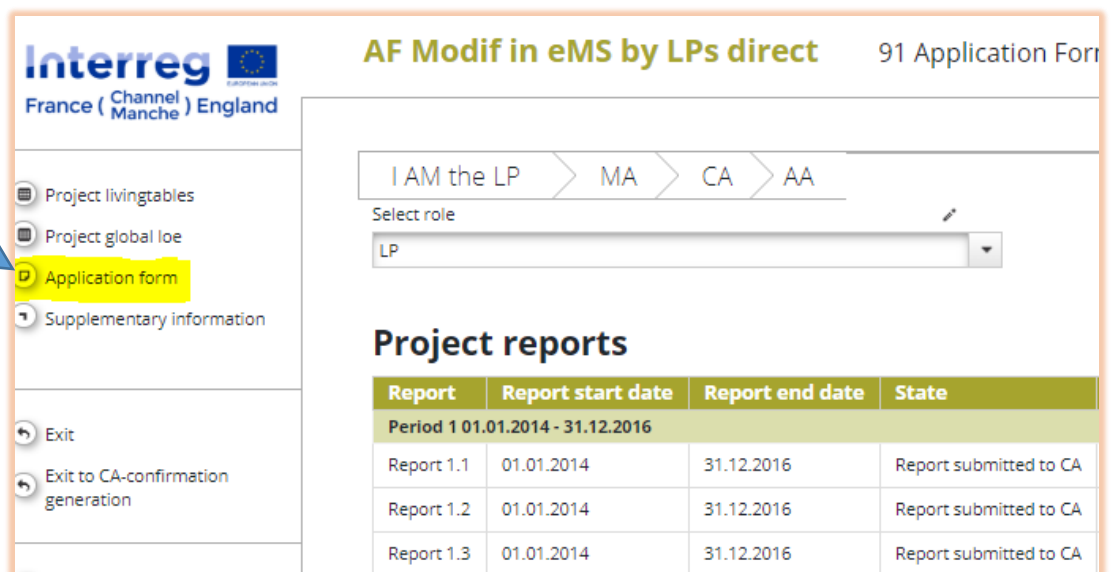
1. Requesting a modification

After the LP has discussed the request with the Finance and Appraisal Officer/Joint Secretariat and the FAO/JS confirms that a request for changes procedure can be started, the LP can begin the procedure on eMS.

The modification request can be accessed from the Application Form section of eMS.

Fig.1: How to access the 'Application Form' on the left hand-side menu

From your reporting section, click on 'Application Form' on the left hand-side menu.

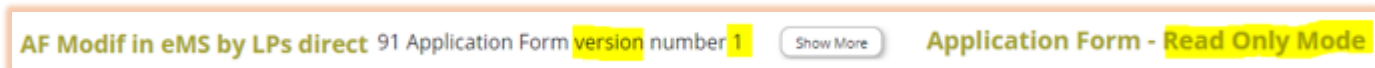


The screenshot shows the 'AF Modif in eMS by LPs direct' page. The left-hand-side menu has 'Application form' highlighted in yellow. The main content area shows a breadcrumb trail 'I AM the LP > MA > CA > AA', a 'Select role' dropdown menu with 'LP' selected, and a 'Project reports' table.

Report	Report start date	Report end date	State
Period 1 01.01.2014 - 31.12.2016			
Report 1.1	01.01.2014	31.12.2016	Report submitted to CA
Report 1.2	01.01.2014	31.12.2016	Report submitted to CA
Report 1.3	01.01.2014	31.12.2016	Report submitted to CA

Please note the version number of your AF and the read-only mode:

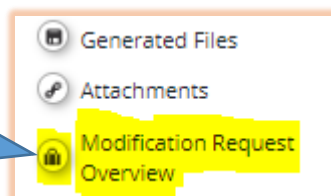
Fig.2: Notification on screen alerting the user the Application Form is on Read-only mode.



The notification bar displays 'AF Modif in eMS by LPs direct 91 Application Form version number 1' and 'Application Form - Read Only Mode'.

Fig.3: How to access the 'Modification Request Overview' on the left-hand-side menu.


Next, click on 'Modification Request Overview' on the left-hand-side menu:



The screenshot shows the left-hand-side menu with 'Modification Request Overview' highlighted in yellow.

Fig.4: Modification Request details and access to request a modification.

Modification Request Details - Modifications entered in eMS directly by LPs themselves - France (Channel) England Technical Assistance

Modification number	Open modification details	Modification request							
		Modification request (date)	Modification requested by	Type of modification	Modification request approved / rejected	Modification request approved / rejected (date)	Modification request approved / rejected by	Submission of application form by lp (date)	Ap acce h
1		05.03.2019 10:19:24	admin	Change of Periods	Accepted	05.03.2019 10:19:24	admin	05.03.2019 10:49:49	Accept

[Request Modification](#)


Click on 'Request Modification':

A pop-up window will appear:

Fig.5: Types of changes to the Application Form in the drop-down menu.

Change Request - Project: Modifications entered in eMS directly by LPs themselves - France (Channel) England Technical Assistance

Categories

Categories 

-
- Change of End-Date/Duration
- Change of Project Result/Indicators
- Change of Partnership
- Change of Budget
- Change of Activities
- Change of Periods

Characters (including HTML): 0 (Limit: 2000), Words: 0

Click on the drop-down menu to indicate the sections of the AF which you intend to make modifications to:

- Change of End-Date/Duration = section A, 'Project Overview' tab
- Change of Project Result/Indicators = section C, 'Project Description' tab
- = section A, 'Project Overview' tab, IF Programme Priority and/or Specific Objective have also changed
- Please note that if it is Output Indicators that you wish to change, you will need to select 'Change of Activities' (section D, 'Workplan' tab).
- Change of Partnership = section B, 'Partners' tab
- Change of Budget = section E, 'Project Budget' tab
- Change of Activities = section D, 'Workplan' tab
- Change of Periods = section D, 'Workplan' tab

Fig.6: 'Categories' drop-down menu.

Once you have ticked the sections which you wish to be able to modify, click on the 'Categories' arrow again or the cross to close the drop-down menu:

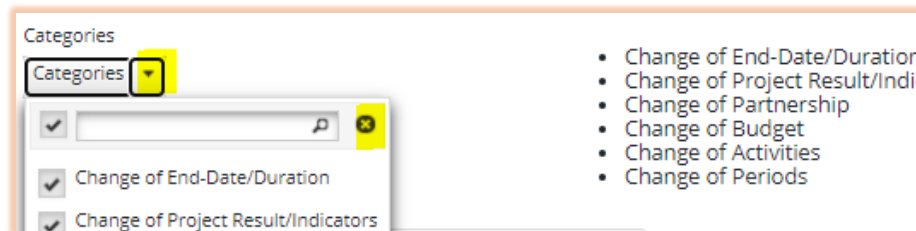


Fig.7: Message tab (message box).

Categories

Categories ▾

- Change of End-Date/Duration
- Change of Project Result/Indicators
- Change of Partnership
- Change of Budget
- Change of Activities
- Change of Periods

Message Attachments

Message text

✂ 📄 🗑 ↶ ↷ B I U abc x₂ x² 🗑 📄 📄 📄 📄 📄 📄 📄 📄 📄 📄

Hello all at the JS,
As discussed earlier today, we would like to modify our Application Form. The Project Modification form and the Budget Modification forms in the Attachments tab will give you more details. Thank you.
Kind regards,
The LP and PPs of Project 2000

Include your message in the message box...

Fig.8: Attachment tab.

Categories
Categories ▾

- Change of End-Date/Duration
- Change of Project Result/Indicators
- Change of Partnership
- Change of Budget
- Change of Activities
- Change of Period

Message Attachments

Upload

Filename	Filetype	Date	User	Comment	Actions
Project 2000 Modification-Form.docx	application/vnd.openxmlformats-officedocument.wordprocessingml.document	12.08.2020 17:15:02	Asterix	<input type="text"/>	Delete
Budget-Modification-Form Project 2000.xlsx	application/vnd.openxmlformats-officedocument.spreadsheetml.sheet	12.08.2020 17:15:14	Asterix	<input type="text"/>	Delete

Send

...and your attachments in the attachments tab by clicking on 'upload'.

And click on 'send' to send your request from either the Message or Attachments tabs.



Fig.9: Confirmation on screen that the request has been sent.



eMS confirms that your request has been sent successfully

AF Modif in eMS by LPs direct

Upload Success
Change Request Successful

Fig.10: Modification Request Details

Modification Request Details - Modifications entered in eMS directly by LPs themselves - France (Channel) England Technical Assista

Modification number	Open modification details	Modification request					
		Modification request (date)	Modification requested by	Type of modification	Modification request approved / rejected	Modification request approved / rejected (date)	Modification request approved / rejected by
2		12.08.2020 17:24:45	Asterix	Change of Periods, Change of Activities, Change of Budget, Change of End-Date/Duration, Change of Partnership, Change of Project Result/Indicators	New		
1		05.03.2019 10:19:24	admin	Change of Periods	Accepted	05.03.2019 10:19:24	admin

Your 'Modification Request Overview' now shows like this with details of the modification request. You can also open the modification details tab.

2. Modification Request Decision (by the JS)


Fig.11: Modification request decision by the JS – drop-down list to confirm the state of the modification

Modification request decision

State

Mr Refuse

Mr Accepted

B I U abc x₁ x² | 

Hello Mr LP,
The JS accepts to open up the Application Form so that you can modify it.
Kind regards,
The JS

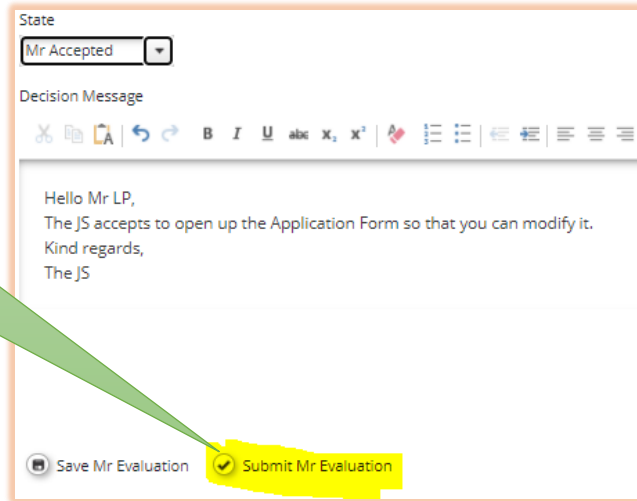
The JS will review your request and the attachments and decide whether to open up the AF for you to modify or not.



Fig.12: 'Submit Evaluation' button.

After having selected 'Mr Refuse' or 'Mr Accepted', the 'Submit Mr Evaluation' button will appear:

The JS clicks on it...

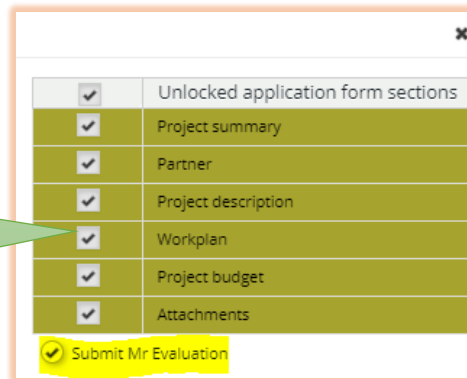


Mr = Modification request

Fig.13: Unlocked application form sections.

A window with the sections to unlock pops up:

The JS selects as per LP's wish or according to what it thinks the LP will really need and clicks on 'Submit...Evaluation'



3. Modifying your Application Form

The Reporting section will now show this notification: 'the project contains an ongoing modification request and on approval of this request the approved application form can therefore change'.

Fig.14: On going modification request notification.

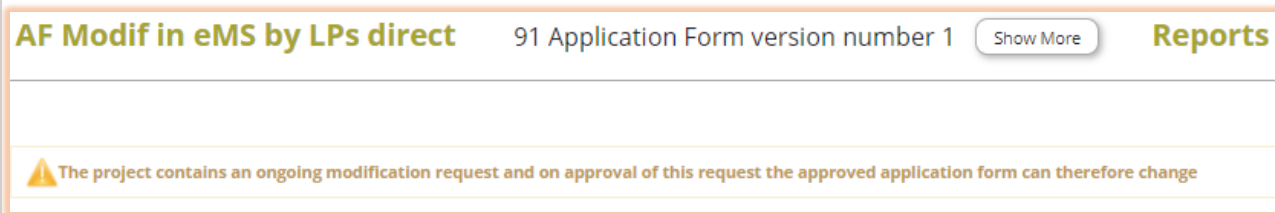


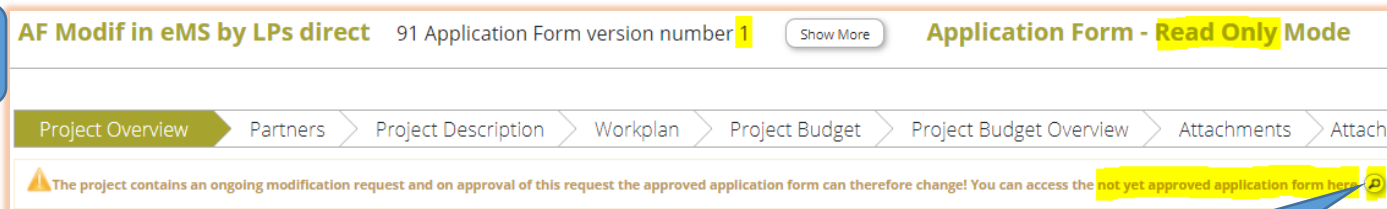
Fig.15: 'Application Form' on the left-hand-side menu.

You can click on 'Application form':



Fig.16: Access to the not-yet approved Application Form for modification.

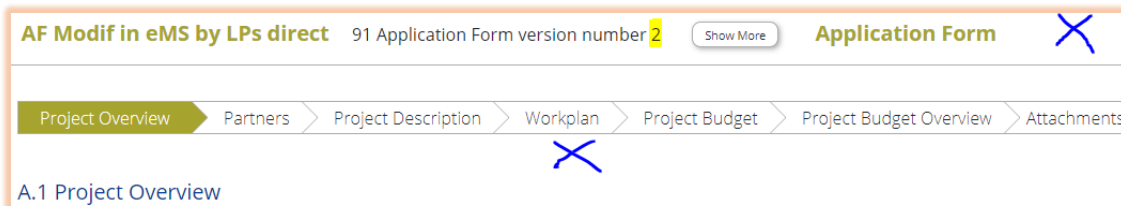
AFv1 is still read only...



...but you now have the option to access the not-yet approved AF to make your changes

Click on that magnifying glass and you are taken to AFv2 which you can edit:

Fig.17: Access to Application Form V2 which can be edited.



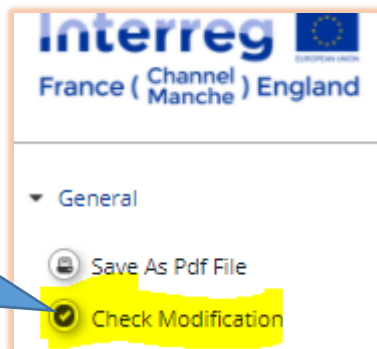
AFv2 does not have the read-only mention and does not show the notification message

Modify your AF as agreed with the JS.

This can take as little as a few minutes for a simple administrative modification up to a few days for technical or fundamental modifications with a lot of data to change, add, or remove.

Fig.18: 'Check modification' button on the left-hand-side menu.

Once you have made your changes, click on 'Check Modification' to make sure that there is no discrepancy or anything missing:



Correct as necessary if there are error messages:

Fig.19: Error message on screen.


 Contributions of partner 'I AM the LP and PP1 of project AF Modif in eMS directly by LPs themselves' Do not match the target value
The amounts entered on the "E.1 project budget per period" section do not match with the total budget ERDF (15.744.489,43 € ≠ 16.055.179,18 €)

Fig.20: 'Submit modification' button on the left-hand-side menu.

Once corrected and the check is successful, you can submit the modified AF for JS review by clicking on 'submit modification' .:

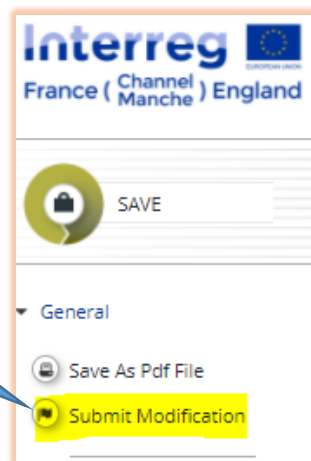


Fig.21: 'Change Request Submitted' notification.



You receive confirmation that it has been submitted:

 Change Request Submitted

Fig.22: Modification Request details.

The modification table (from 'Modification Request Overview') is filled automatically as the different stages are completed:

Modification Request Details - Modifications entered in eMS directly by LPs themselves - France (Channel) England Technical Assistance

Modification number	Open modification details	Modification request (date)	Modification requested by	Modification request			Submission of application form by lp (date)	Modification			User	Open original application form
				Type of modification	Modification request approved / rejected	Modification request approved / rejected (date)		Modification request approved / rejected by	Application form accepted / rejected / handed back	Application form accepted / rejected / handed back (date)		
3		12.08.2020 19:41:32	Asterix	Change of Project Result/Indicators, Change of Partnership, Change of Periods, Change of Budget, Change of Activities, Change of End-Date/Duration	Accepted	12.08.2020 19:53:12	valbou	12.08.2020 20:39:56				

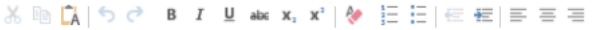
4. JS Review of your modifications

Fig.23: 'Compare Modifications' button.

Application form decision

State
Mr finally accepted

Approval Message



Save Mr Evaluation Submit Mr Evaluation Compare Modifications

The JS clicks on the magnifying glass and compares AFv2 with AFv1 before making a decision:

Fig.24: 'Print with original one as base' button.

The JS selects which sections should be printed for comparison and clicks on 'Print with original one as base':

Application form sections to include in comparison (template used for comparison must support this feature)

Project summary Partner Project description

Workplan Project budget Attachments

Print with original one as base Print with new one as base Compare HTML

Fig.25: Notification of changes to the Application Form.

The changes will be highlighted, **red** being the initial version and **green** the proposed new version

AF Modif in eMS by LPs direct 91 - Phase 2 Application Form Version **12** - Submitted version

5. JS decision

Fig.26: 'Modification Request Overview' button.

Same as before, the JS clicks on 'Modification Request Overview':

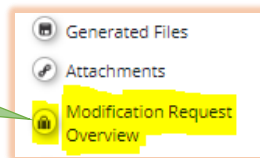


Fig.27: Magnifying glass to 'Open modification details' section.

...then on the magnifying glass under column 'Open modification details':


Modification number	Open modification details	Modification request				
		Modification request (date)	Modification requested by	Type of modification	Modification request approved / rejected	Mo ap reje
3		12.08.2020 19:41:32	Asterix	Change of End-Date/Duration, Change of Activities, Change of Partnership, Change of Budget, Change of Project Result/Indicators, Change of Periods	Accepted	12.08 19:53

Fig.28: 'Submit Evaluation' button.

The JS accepts the changes and clicks on 'Submit Mr Evaluation':

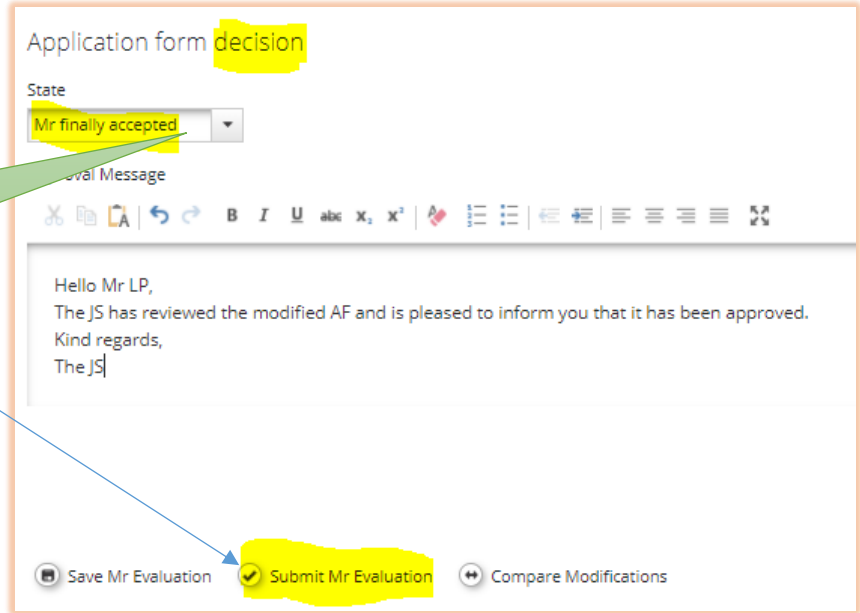


Fig.29: 'Change accepted' notification on screen.

eMS confirms that the change has been accepted...

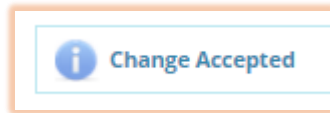


Fig.30: 'Reporting section' and the 'Application Form' section on eMS.

...both the 'Reporting' section and the 'Application form' now display AFv2 with no notification messages:

Also note that AFv2 is read only again

