Guidelines for Managing Project Data Modification in eMS in Connection to Project Changes

Version 1.0
July 2017
Introduction

This document provides guidance on how to manage project data modification in eMS in connection to project changes.

Project changes within the Danube Transnational Programme are regulated by the DTP Implementation Manual, including the necessary processes and documents. The project change process in general is managed outside the eMS and once the change process is concluded by a Programme level confirmation / decision and with signing the Adendum to the Subsidy Contract (in case of major changes), the modified project data is to be entered by the LP into eMS, uploading also all the documents of the respective project change. Modified project data of both major and minor changes are to be updated in eMS, except for the project budget in case of minor budget reallocations between Work Packages / Budget Lines (below 5% / 10% flexibility limit).

**ATTENTION!!!**

As data modification process in eMS affects the reporting process in the system, it is important that such modification starts only after the Lead Partner and the JS Project Officer have an agreement on that step!
Initiating project data modification

Once the project change has been concluded and the LP and JS PO agree to start project data modification in eMS, the first step is that the LP initiate the “modification request”. Entering the project in eMS, selecting the “LP role” in the drop-down list, the “project” view is to be selected by pressing the project button on the left side menu of the screen.

In project view, on the left side menu of the screen the Request Modification is to be pressed in the Application And Contract section. On the pop-up window the type(s) (categories) of project change is to be selected, the project change(s) is to be very briefly described (e.g. partner change of ERDF PP7) and by pressing the send button submitting it to the JS.

Once the “modification request” is sent by the LP in eMS, the reporting section is not available for the LP or PPs, until the data modification process is concluded in the system. Accessing the
project in eMS, instead of the reporting section, the modification request page is visible, in which the status of the process can also be seen.

### Modifying project data

The LP will be informed by the JS PO by email that the JS opened up the project application in eMS for the LP to edit, whose status is also indicated on the modification panel.

The different parts of the AF can be accessed through the upper tabs of the project.

Modification of project data is simple and self-explanatory for most of the data fields, but there are certain issues to be considered.
In case of partner change, the withdrawing PP is not to be deleted from the partner list, but at the "Acronym" section of the PP description "- withdrawn" text is to be added to the PP Acronym.

Budget items need data at WP /BL / period level that does not exist in the original budget tables, for which the project modification tool (Excel based – downloadable at DTP website) generating the necessary data level, helping to fill in the modified budget table.

Always remember to press “SAVE” before leaving a section, as by changing section of the application without saving, the inserted data is lost!
Once the project change related data is modified in the application, all documents connected to the specific project change are to be uploaded in a single, zip file in the Attachments section.

When all the project change related data has been modified and the documents uploaded, the Check Modification button is to be pressed. Following that, above the project section tabs a message appears, indicating if some parts need correction or the data modification is Successfully checked.

In case the check was successful, the modification is to be submitted by the specific button in the left menu list and the confirmation of the step.

When the data modification is submitted, the status of the process is indicated as "Modification request submitted"
In case following the JS check of the modification some corrections are necessary, the JS PO will inform the LP by email, as well as opening up the application for the LP in eMS and the “Modification request” status will indicate this accordingly.

In case the project data has been correctly modified in accordance with the related project change and the JS approves this in eMS, the LP will be informed by an email.

Following the JS approval step in eMS, accessing the project in eMS, the LP and the PPs will be able to access the reporting section again.