**Engineering Change Requests for Dummies**

1. Two possibilities: the official CERN logo for an ECR affecting a machine that is in operation; the official project logo for an approved project that has such a logo.

2. The name of the machine if it is in operation, i.e. 'CP5', 'PS', 'PSB', 'SPS', 'LHC'.

3. The EDMS no. To ensure that the ECR is uploaded in the right location on the EDMS, the EDMS no. is obtained by the Configuration Manager.

4. The version no. of the ECR following the so-called software engineering coding scheme:
   - Draft releases always start with '0.1', '0.2'; (so rejected ECRs)
   - A recently approved ECR has a rev. no. of the form '1.0'
   - An implemented ECR has a rev. no. of the form '2.0'.
   - To ensure a required coherency, version numbers are provided by the Configuration Manager.

5. The validity of a given release of an ECR. It necessarily starts as 'DRAFT', then is followed by 'RELEASED', 'IMPLEMENTED', or 'ABANDONED'.

6. The document reference that complements the EDMS code. To guarantee the appropriateness of the reference and provide some coherency, this code is provided by the Configuration Manager.

7. The date of release of the ECR. The ISO 8601 format: YYYY-MM-DD.

8. The document type that is kept to "ENGINEERING CHANGE REQUEST" throughout its whole lifecycle (see 16).

9. A practical title for the ECR selected so that one can easily refer to it.

10. A brief description of the change that is proposed.

11. The names and affiliations (dept./grp.) of the authors of the ECR, very likely those who have been mandated for preparing the ECR. It can be the equipment owner or any one else duly mandated.

12. The names and affiliations (dept./grp.) of the checkers of the ECR. Checkers shall be those who have the skills to appraise the quality of the ECR, its feasibility, and from all appropriate perspectives.

13. The names and affiliations (dept./grp.) of the approvers of the ECR. Approvers shall be all those for whom the implementation of the ECR has a major impact (performance, modifications, availability, maintainability, operation costs, schedule, etc.) on the equipment or activities they have the responsibility for. By approving the ECR, they are saying that they accept the consequences of the ECR, whether these are positive or negative.

14. The names or e-groups of the required recipients for the ECR.

15. If the list of actions is rather long, it shall be listed in the body of the ECR and a mention referring to the correct section feature on the cover page. If the identified actions are not many, they can be listed on this page.

16. To make it simple, this document is called Engineering Change Request throughout its whole lifecycle. It is obvious that once approved it becomes an order and shall be implemented.

17. ECR may follow a rather long lifecycle and a printed version is not necessarily the latest one. Hence, one shall check on the EDMS if the version in hand is the latest one.

**templates**

ECR templates (Microsoft Word for Windows and for Mac OSX*) are available from the 'New from template...' menu. Then select, the appropriate template from the relevant tab.

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*a as soon as this service will be offered for Mac users. In the meantime, templates can be downloaded from: https://dfs.cern.ch/dfs/Applications/CERN/DraftFolder Workgroup Templates and the corresponding facility folder (PS-Complex, SPS or LHC).