

# Change Request (CR)

<b>Client Name</b>	<u>Petroleum Technology Research Centre</u>	<b>Vendor</b>	<u>ClimbIT Inc.</u>
<b>Project Name</b>	<u>STEPS Online Collaborative Research Community – Phase 1</u>	<b>Project No.</b>	<u>PTRC-001</u>

## SECTION A: CHANGE REQUEST DESCRIPTION

<b>CR Initiator</b>	<u>Malcolm Wilson</u>	<b>CR Date</b>	<u>May 11, 2011</u>
<b>CR No.</b>	<u>001</u>	<b>Priority</b>	<u>HIGH</u>
<b>Type of Change</b>	<u>Additional functionality outside the scope of Statement of Work</u>		

### Description of Requested Change:

- 1. Dynamic Profiles** – Expand on the static profiles implemented during Phase 1 to include all the dynamic and collaborative features available in SharePoint. These updated profiles are required to stimulate more interaction and collaboration by allowing users to rate content and provide feedback through blogs and forums, as well as provide the PTRC and STEPS with metrics that can be used to improve content, information services and understand user and member behavior. Functionality in this item includes:
  - Information services to track member relationships, contacts, significant event notifications;
  - Dynamic profiles of each researcher and research organization to demonstrate and articulate their unique knowledge, competency and research capability;
  - Feedback mechanisms including tagging, notes, ratings, noteboard to increase member engagement and enable PTRC management to govern research community services and behaviours;
  - Expertise tagging to enable industry members to identify expertise in specific areas of interest;
  - Collaboratively engage members to determine research direction and support requirements;
  - Blogging, posting and wikis to increase discussions and information exchange amongst members;
- 2. Enhanced Information Searches** – Additional online search services have been identified that would be of value to members. For example, the ability to search by multiple themes, additional unstructured information services such as expertise / know-how searching.

## SECTION B: IMPACT OF CHANGE

### Resource(s) Impacted by Change:

- ClimBIT and Mera Group resources will be required to perform the work. Mera will engage directly with PTRC to improve visibility of their significant role in content development and member acquisition.
- There may be an impact on the current Public Site and this is subject to an assessment of future cost of ownership to keep the current site or to migrate it to the new infrastructure.

### Estimated Impact to Budget and Schedule:

The project schedule will be impacted by approximately 60 days with the

**Total Estimated Cost:** \$47,500

**Estimated Revised Completion Date:** August 1, 2011

## SECTION C: PROJECT MANAGEMENT APPROVAL

**Date Submitted:** May 11, 2011

**Comments:** This change order has been developed as a result of the positive feedback obtained from Board reviews and extensive demonstrations and feedback sessions conducted at the Williston Basin conference from May 1-3, 2011

**PTRC Approval:**



**Title:**

*CEO*

**Date:**

*May 12/2011*

**CLIMBIT  
Approval:**

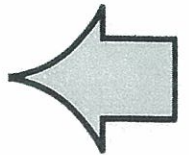


**Title:**

*Manager/Partner*

**Date:**

*May 13/2011*



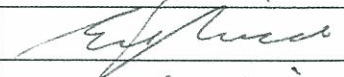
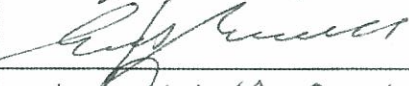
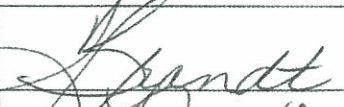
# Change Request

## Program Change Request

<b>Title:</b>	Alerting relating to Project Milestones/Additional Icon added to project approval process
<b>Reference No.:</b>	N/A
<b>Originated By:</b>	Mark Flewelling
<b>Originator's Program Manager:</b>	Tammy Brandt
<b>Date Originated:</b>	7/11/11

<b>Reason for change:</b>	Alerting will allow PTRC to recognize milestone dates for funding release, project deadlines etc. Additional icon for "Approval Pending" to allow approver to ask for additional information prior to approval.
<b>Change details:</b>	6 days of effort.
<b>Cost:</b>	6 days x 8 hrs x \$130/hr=\$6,240.00+ applicable taxes

## Approval to Implement

<b>PTRC Approval:</b>	
<b>PTRC Approvers Signature:</b>	
<b>Date of Signature:</b>	Nov 10, 2011
<b>ClimbIT Approval:</b>	Tammy Brandt
<b>Signature of ClimbIT Approval:</b>	
<b>Date of Signature:</b>	Nov 10, 2011