

User Manual

**Projects: Creating and Viewing
For Managing Authority, Intermediary Body and Beneficiary users.**

Version 2

PROVIDENT



Document Version Control

Version	Amendment Author	Date	Change Description
1	Mark Crossan	8th September 2017	Initial Draft
2	Mark Crossan	26 th October 2017	Focusing on ERDF fund
3	Mark Crossan	27 th October 2017	Update of screenshots

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1 Overview

The purpose of this document is to provide the end user an instructional manual that can be referenced as a guide for creating and viewing ERDF Projects and the subpanels within the record. This document focuses on the ERDF fund and should be used by Beneficiary users.

For ERDF, the Scheme Type will dictate what user group will create the Project and Declaration records. The different Scheme Type value describes which user role can create Projects:

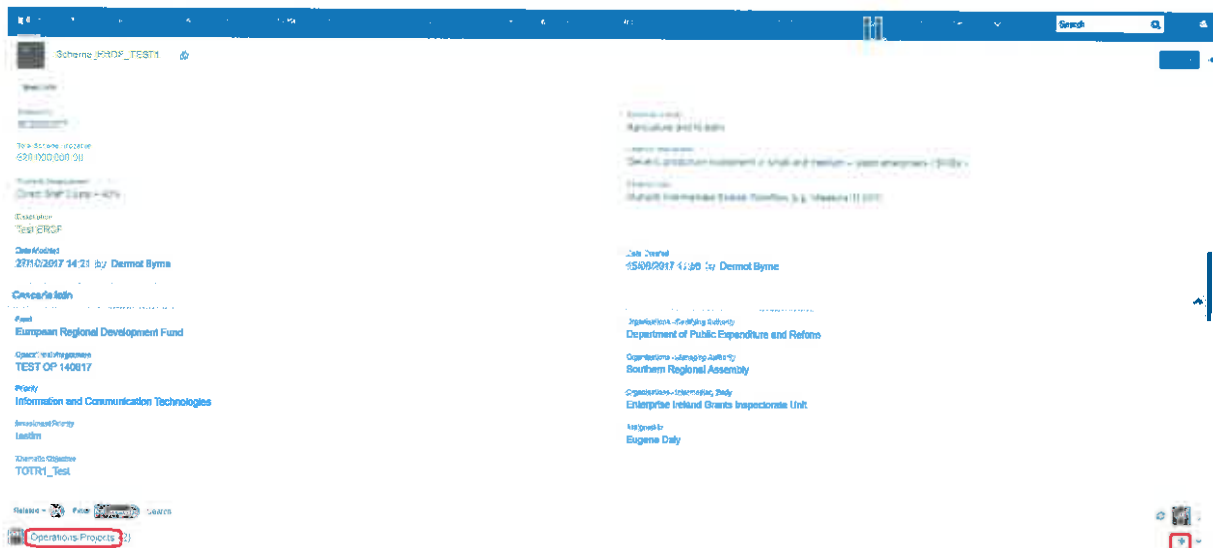
- *Scheme Type of "Multiple Intermediate Bodies Workflow [e.g. Measure1] (M1)" the IB user will create the Project.*
- *Scheme Type of "Managing Authority or Intermediate Body create Projects (M2)"*
- *Scheme Type of "Beneficiary creates Projects (M3)"*

2 Creating an Project

2.1 Scheme Type of "Multiple Intermediate Bodies Workflow [e.g. Measure1] (M1)":

2.1.1 A Project will be created from the relevant Scheme record.

2.1.2 Open the relevant Scheme record and click on the "+" button on the Projects subpanel:



2.1.3 A new blank Project record will be displayed. Fill in all of the details as required starting by entering in a Name.

Basic Info

Legal Name/Partnership Name: ABC DEF

Operational/Postal Address: 50 Wicklow Street

Location: Dublin

Start Date: 27/10/2017

End Date: dd/mm/yyyy

Scheme Type: Multiple Intermediate Bodies Workflow [e.g. Measure 1] (M1)

Assigned to: Dermot Byrne

Date Modified: 27/10/2017 13:25 by Dermot Byrne

2.1.4 There are a number of mandatory fields within each tab. These will be marked as “Required” and will be highlighted in red if the record is attempted to be saved before they are filled out.

2.1.5 On the Basic Info tab the Recipient field needs the Recipient organisation selected. This field is specific to Schemes with a Scheme Type of “Multiple Intermediate Bodies Workflow [e.g. Measure1] (M1)”.

Basic Info

Legal Name/Partnership Name: ABC DEF

Operational/Postal Address: 50 Wicklow Street

Location: Dublin

Start Date: 27/10/2017

End Date: dd/mm/yyyy

Scheme Type: Multiple Intermediate Bodies Workflow [e.g. Measure 1] (M1)

Assigned to: Dermot Byrne

Date Modified: 27/10/2017 13:25 by Dermot Byrne

2.1.6 Click on the field and then click on “Search and Select”.

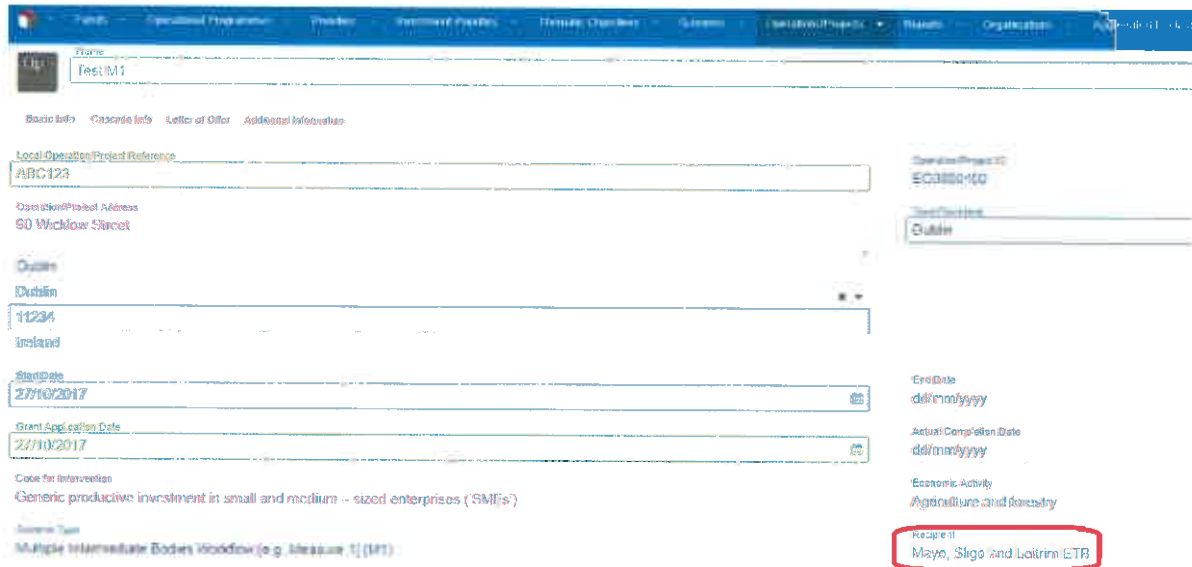
Recipient

Search and Select

2.1.7 Search and Select the Recipient organisation from the list:



2.1.8 The selected organisation is then displayed in the field:

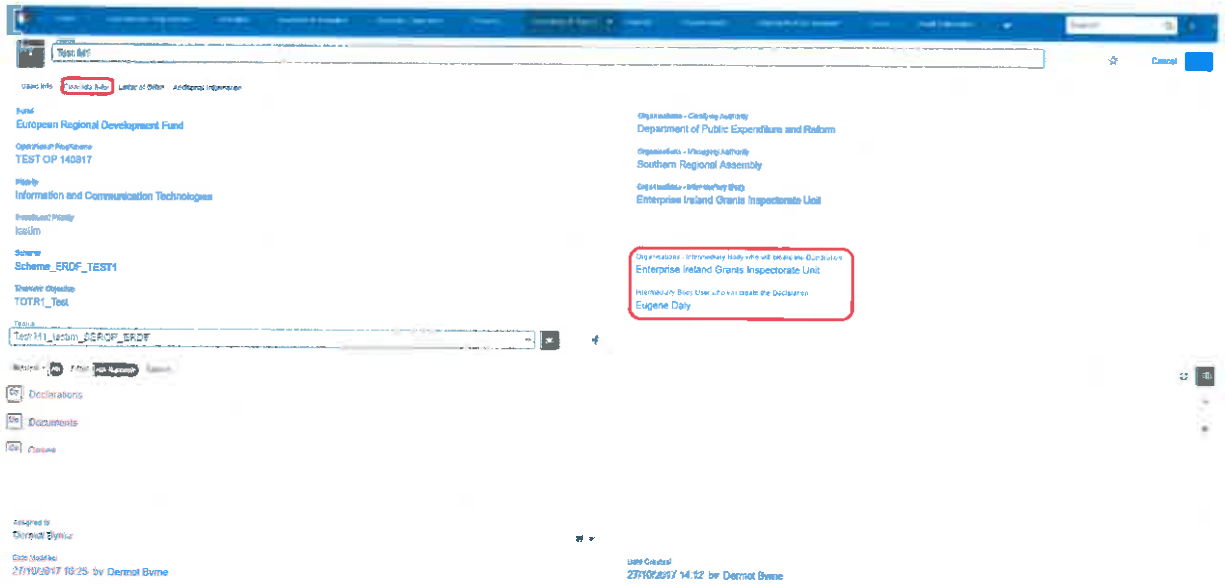


2.1.9 Fill in the rest of the fields as needed.

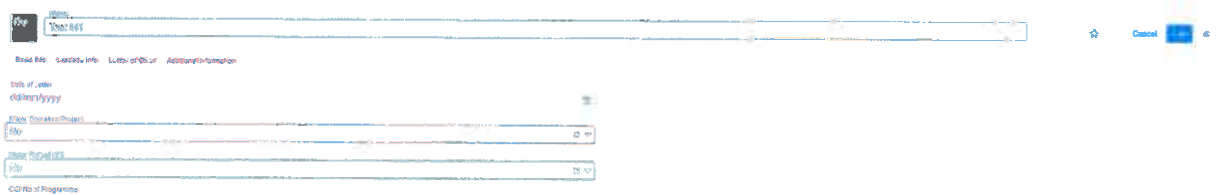
2.1.9 On the Cascade Info tab the “Intermediary Body who will create the Declaration” field and the “Intermediary Body User who will create the Declaration” field need to be selected. These fields are specific to Schemes with a Scheme Type of “Multiple Intermediate Bodies Workflow [e.g. Measure1] (M1)”.

2.1.10 First Search and Select the Intermediary Body who will create the Declaration field.

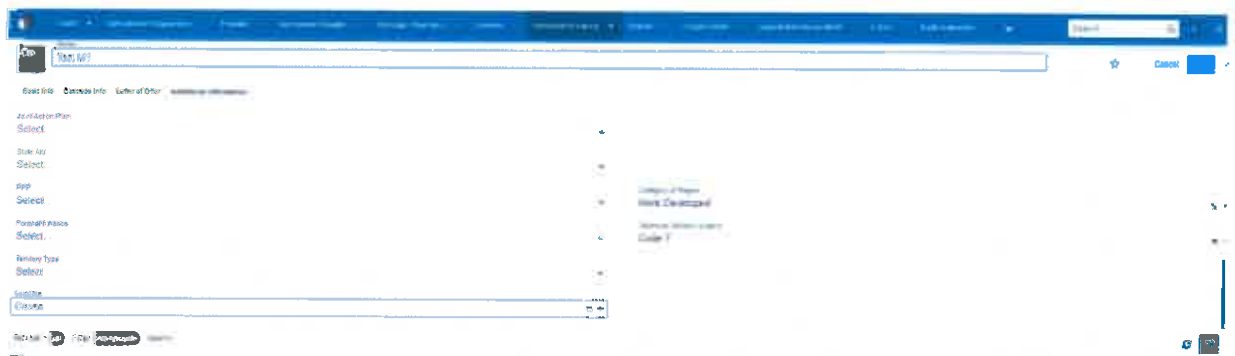
2.1.11 Then Search and Select the Intermediary Body User who will create the Declaration.



2.1.12 Enter in details into the “Letter of Offer” tab. Note that the “CCI No. of the Programme” is automatically populated based on the related Operational Programme:



2.1.13 Enter in details into the “Additional Information” tab:

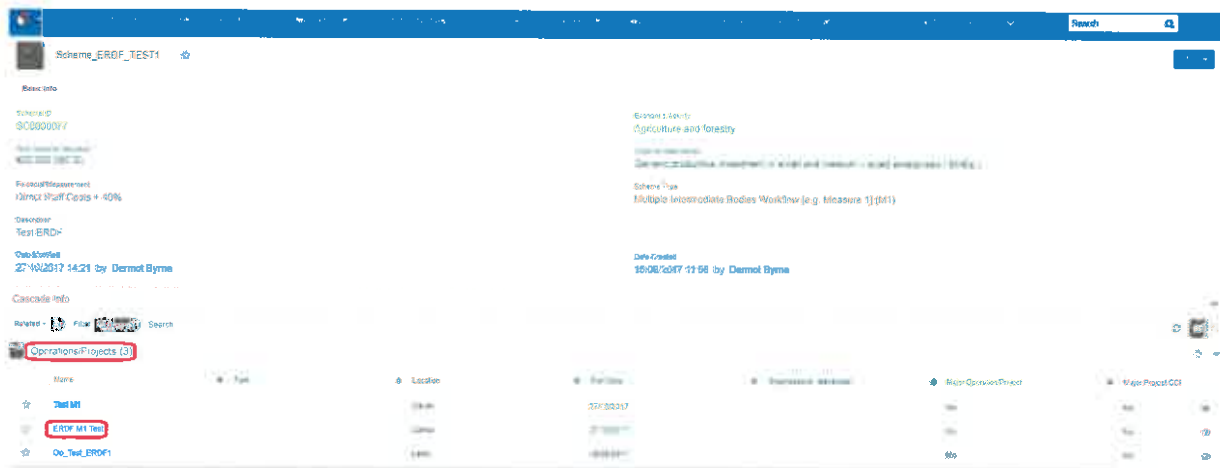


2.1.14 Save the record by clicking on the “Save” button:



2.1.15 Note that once the record has been saved, only the record owner (the “Assigned to” user) has the rights to edit.

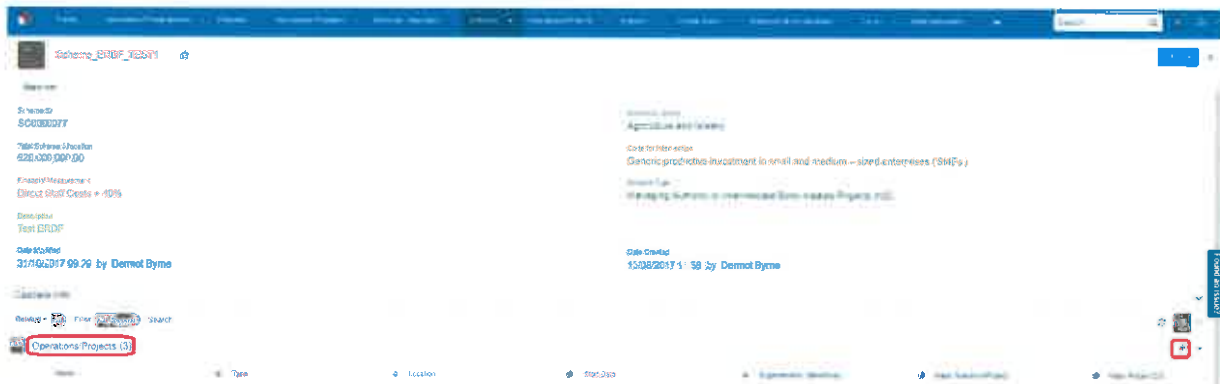
2.1.16 The newly created Project will then appear in the subpanel under the relevant Scheme:



2.2 Scheme Type of “Managing Authority or Intermediate Body create Projects (M2)”:

2.2.1 A Project will be created from the relevant Scheme record.

2.2.2 Open the relevant Scheme record and click on the “+” button on the Projects subpanel:



2.2.3 A new blank Project record will be displayed. Fill in all of the details as required starting by entering in a Name.

2.2.4 There are a number of mandatory fields within each tab. These will be marked as “Required” and will be highlighted in red if the record is attempted to be saved before they are filled out. Fill in the details as needed.

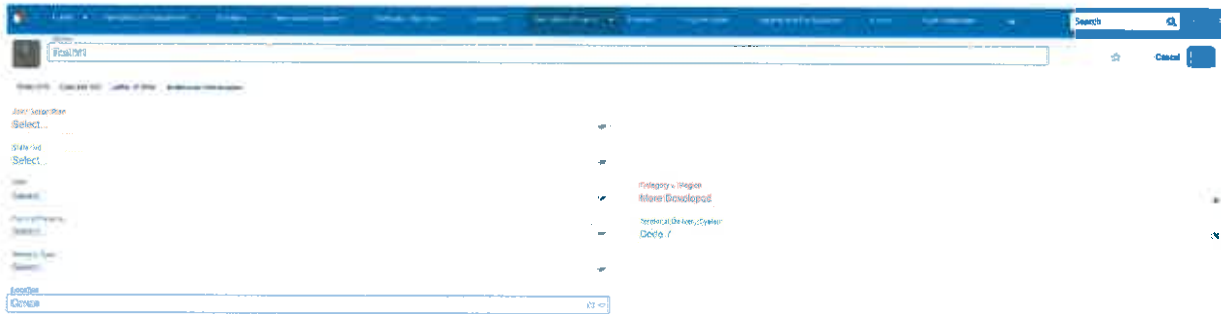
2.2.5 The Cascade Info tab details the organisations associated with this particular Project.

Basic Info **Cascade Info** Letter of Offer Additional Information

2.2.6 Enter in details into the “Letter of Offer” tab. Note that the “CCI No. of the Programme” is automatically populated based on the related Operational Programme:

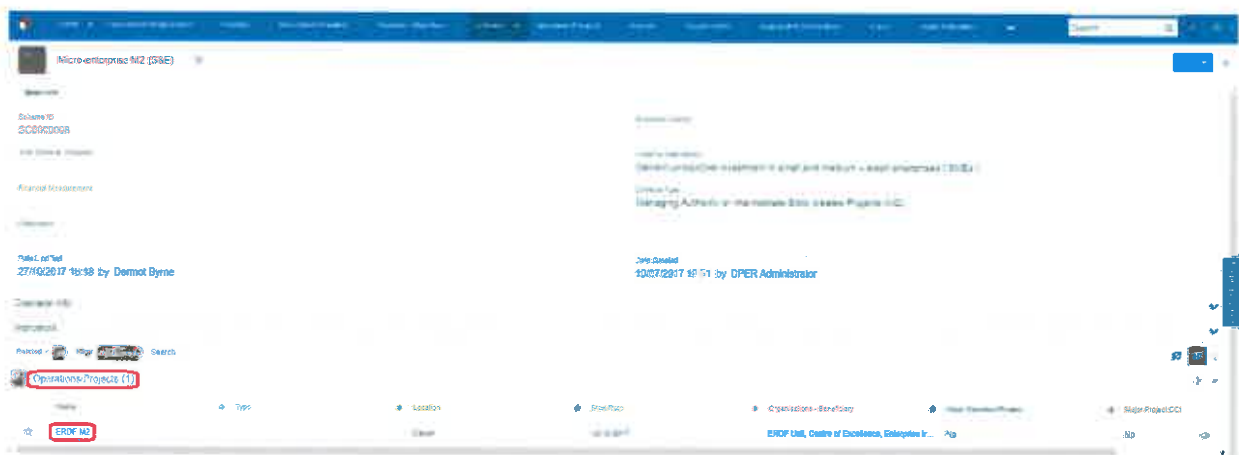
2.2.7 Enter in details into the “Additional Information” tab:

2.2.8 Save the record by clicking on the “Save” button:



2.2.9 Note that once the record has been saved, only the record owner (the “Assigned to” user) has the rights to edit.

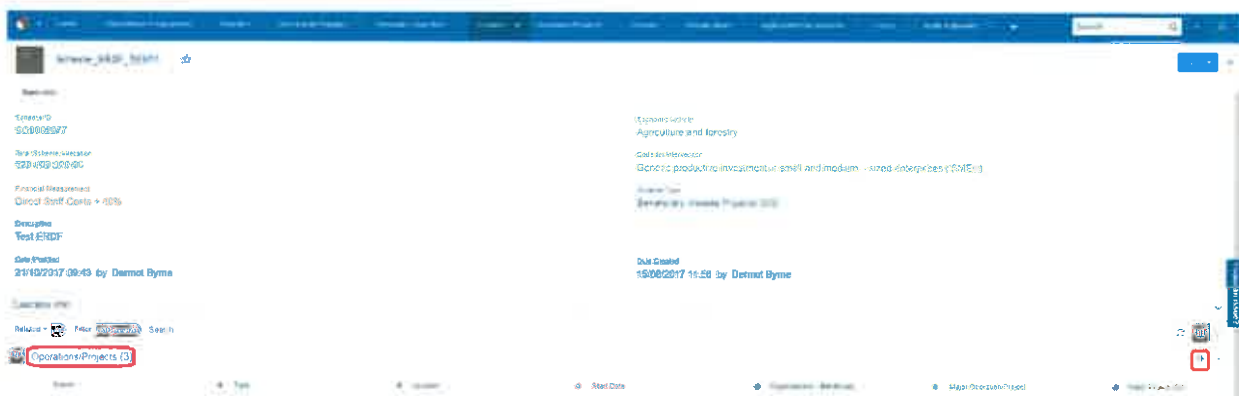
2.2.10 The newly created Project will then appear in the subpanel under the relevant Scheme:



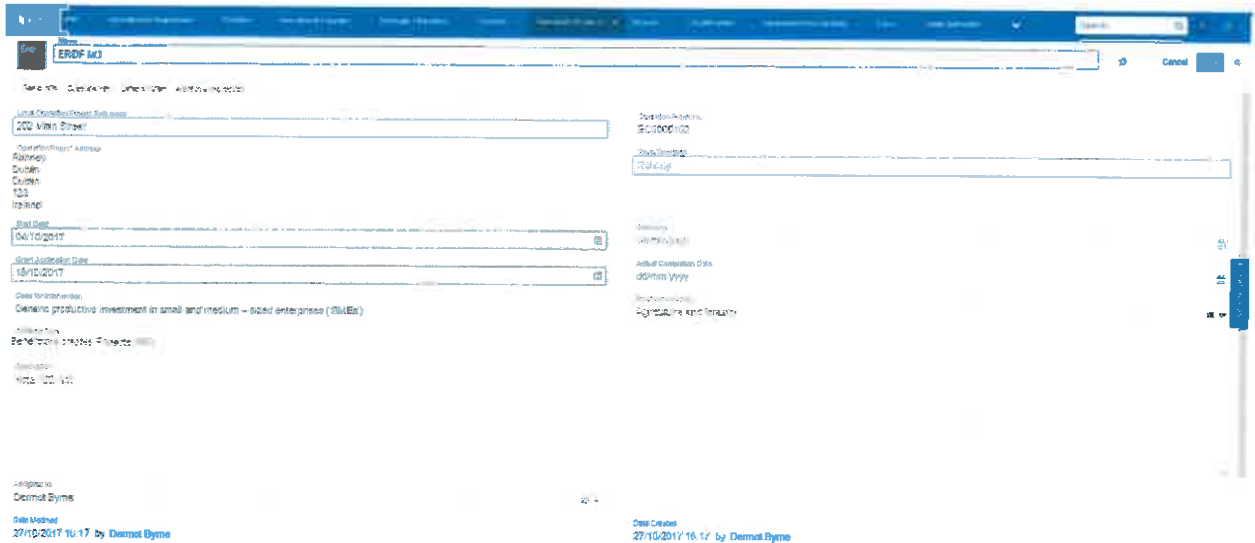
2.3 Scheme Type of “Beneficiary creates Projects (M3)”:

2.3.1 A Project will be created from the relevant Scheme record.

2.3.2 Open the relevant Scheme record and click on the “+” button on the Projects subpanel:



2.3.3 A new blank Project record will be displayed. Fill in all of the details as required starting by entering in a Name.



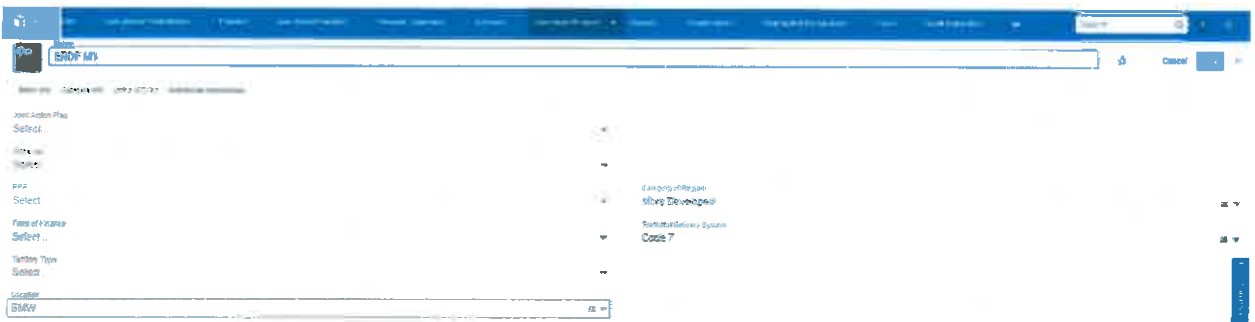
2.3.4 There are a number of mandatory fields within each tab. These will be marked as “Required” and will be highlighted in red if the record is attempted to be saved before they are filled out. Fill in the details as needed.

2.3.5 The Cascade Info tab details the organisations associated with this particular Project.

2.3.6 Enter in details into the “Letter of Offer” tab. Note that the “CCI No. of the Programme” is automatically populated based on the related Operational Programme:



2.3.7 Enter in details into the “Additional Information” tab:

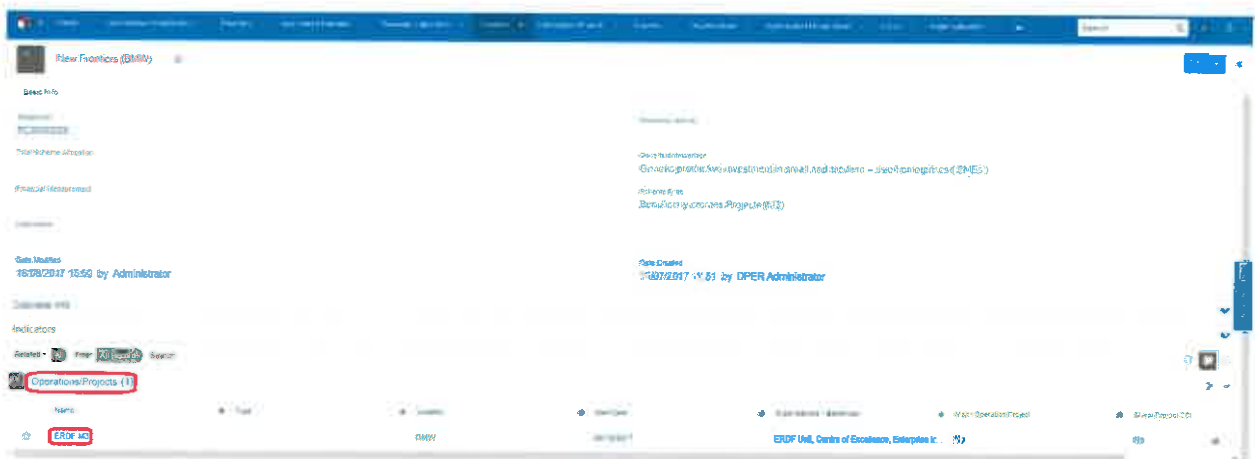


2.3.8 Save the record by clicking on the “Save” button:



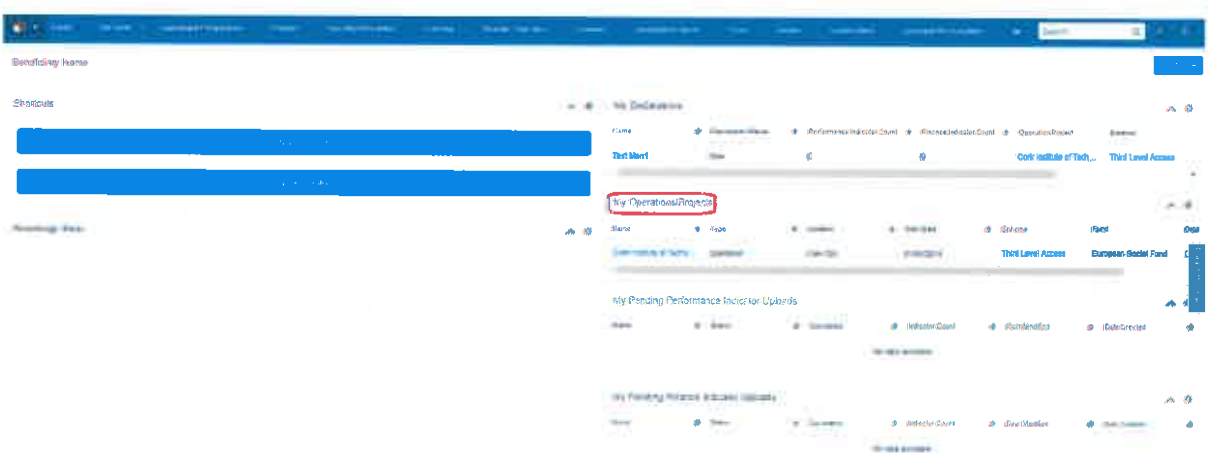
2.3.9 Note that once the record has been saved, only the record owner (the “Assigned to” user) has the rights to edit.

2.3.10 The newly created Project will then appear in the subpanel under the relevant Scheme:



3 Viewing an Project

3.1 Beneficiary users will see relevant Projects in the “My Operations/Projects” dashlet on the main homepage dashboard:



3.2 Alternatively Managing Authority, Intermediary Body and Beneficiary users can go to the “Operations/Projects” tab and search for a Project record. Just to note that users will only see Project records that they have the rights to view.



3.3 Only the “Assigned to” user on the record has the rights to edit the record.

3.4 The subpanels on the Project record will display records that are associated with the Scheme:

