Product Version: © 2023 – PRS – 2.1.0.0

External PRS Training Guide

NTA
Údarás Náisiúnta Iompair
National Transport Authority
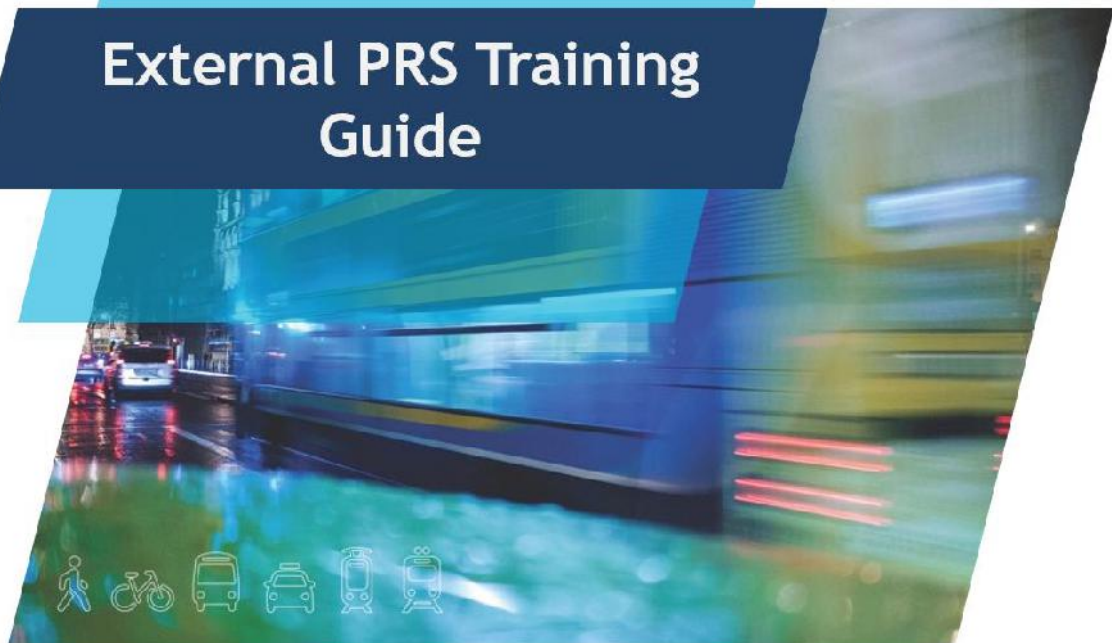
Version 1.2

Prepared by

Ammiraju B

opensky

YOUR VISION.REALISED.

Document History

Version	Author	Date	Description of Change
0.1	Ammiraju B	26/12/2022	First draft
0.2	Vishvas Sharma	12/01/2023	Initial Review and Updates
0.3	Matt Griffin	17/01/2023	Updated the alignment and font changes
0.4	Lidia Bator	25/01/2023	Updated content for existing functionalities (prior to Phase 2)
0.5	Ammiraju B	30/01/2023	Updated the document with review comments
1.0	Vishvas Sharma	30/01/2023	Document Formatting and Alignment
1.1	Vishvas Sharma	21/02/2023	Updated comments from Roy
1.2	Ammiraju B	24/03/2023	Updated comments from Selva

APPROVERS LIST

Name	Role	Approver/Reviewer	Approval/ Review Date
Matt Griffin	PMO Manager	Reviewer	17/01/2023
Lidia Bator	Senior Business Analyst	Reviewer	25/01/2023
Vishvas Sharma	Senior Project Manager	Reviewer	30/01/2023
Kavya Kunduru	Test Lead	Approver	30/01/2023

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1. PRS V2 KEY BENEFITS

Key benefits for external system users include:

- Automated emails

- Improved data auditing

- Multi annual project spend tab to view projects yearly spend and allocations history at a glance

- Improved reporting with access to all data instead of on a yearly basis only

- Improved search functionality

2. LOGIN

To log in the user must navigate to the home page URL. Here they will be prompted to sign in via Username & Password.

Welcome to the PRS – NTA Capital Grant Management System

PASSWORD RESET

In the event where the user cannot access the site via their current credentials, they have the option to reset their password via the '**Forgot your Password**' link.
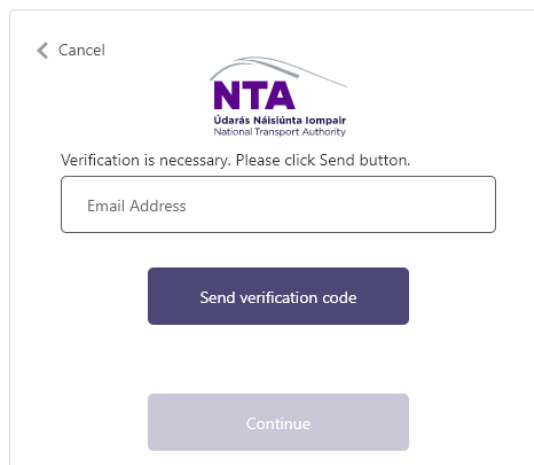
Clicking this link will redirect the user to the password reset screen. The user will be instructed to enter the email address associated with their PRS account and click the '**Send Verification Code**' button.

Once the user clicks the '**Send Verification Code**' button an email will be sent to the entered email address and the user will be redirected to a verification page. Please note that this email verification code will expire after 5 minutes.
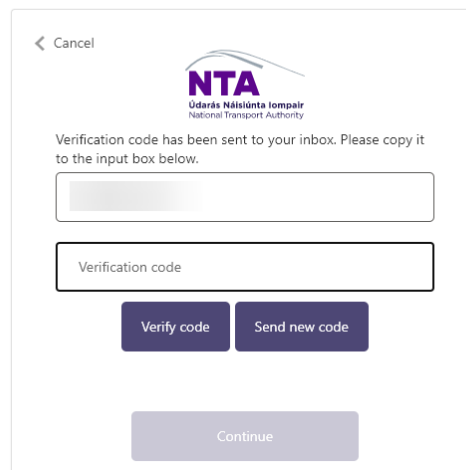
Verify your email address

Thanks for verifying your ▓▓▓▓▓▓.com account!

Your code is: 932830

The user can then either type or copy/paste the code they receive into the verification code field and click the '**Verify code'** button.

Welcome to the PRS – NTA Capital Grant Management System
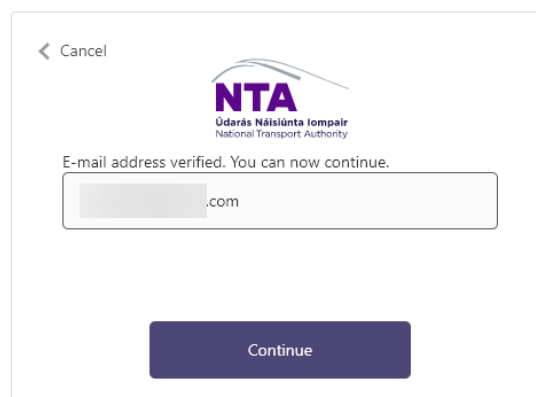
‹ Cancel

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Verification code has been sent to your inbox. Please copy it to the input box below.

Verification code

[Verify code] [Send new code]

[Continue]

Alternatively, if no email was received the user can click the '**Send new code**' button to receive a new code.

Once a valid code is entered and the user has clicked verify the user is allowed to continue to the password reset screen.

Welcome to the PRS – NTA Capital Grant Management System
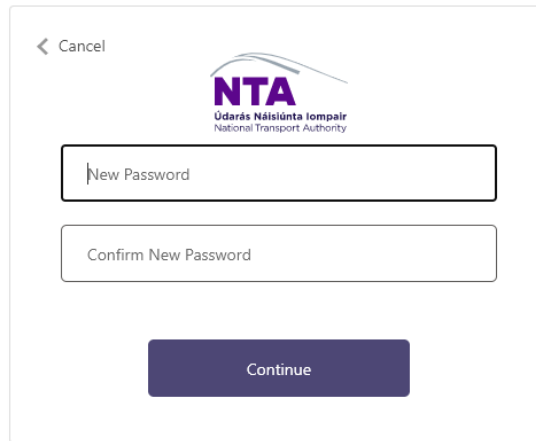
‹ Cancel

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E-mail address verified. You can now continue.

▓▓▓▓▓.com

[Continue]

Here the user can enter a new password & confirmation before continuing to the login screen. The password must conform to the following standard:

- The following characters are not allowed: % [&'', ":+=\/()<>] and space.

- Allowed characters '@', '.', dash and underscore cannot be starting characters.
- Allowed characters '@', '.', dash and underscore cannot be ending characters.

Welcome to the PRS – NTA Capital Grant Management System

< Cancel

NTA
Údarás Náisiúnta Iompair
National Transport Authority

[New Password]

[Confirm New Password]

[Continue]

SYSTEM USERS

The external PRS system is accessed by 5 types of user roles: Claim Proposers, Finance Officers, Project or Programme Managers, Director or Equivalents and Sponsoring Agency Administrators.

CLAIM PROPOSER

This user role is responsible for:

- Creating claims on specific projects and submitting them for Finance Officer review

FINANCE OFFICER

This user role is responsible for:

- Approving Claims to be processed by NTA
- Rejecting Claims back to Claim Proposer for revision

SPONSORING AGENCY ADMINISTRATOR

This user role is allowed to:

- Create claims on specific projects and submit them for Finance Officer review
- Create documents Grant Application Form/Project Funding Continuance Form/Allocation Adjustment Form

- Edit documents if they are in Draft or NTA Preview status and provide comments on them

- Approve documents if they are in Draft or NTA Preview status

- Cancel document submission

- Export details from grids to excel spreadsheet

This user role is responsible for:

- Manage Users assignment to the Projects. This applies only to the 'Project or Programme Manager' and 'Director or Equivalent' roles. Claim Proposer and Finance Officers have access to all projects by default

PROJECT OR PROGRAMME MANAGER

This user role is responsible for:

- Creating documents Grant Application Form/Project Funding Continuance Form/Allocation Adjustment Form

- Editing documents and providing comments on them

- Cancelling document submission

- Approving documents if they are in Draft or NTA Preview status

- Cancelling Document in the 'For SA Approval' status and changing the status to 'NTA Preview'

DIRECTOR OR EQUIVALENT

This user role is responsible for:

- Creating documents Grant Application Form/Project Funding Continuance Form/Allocation Adjustment Form

- Editing documents and providing comments on them

- Cancelling document submission Approving documents if they are in Draft, NTA Preview or For SA Approval status. In the last status user is also responsible for providing eSignature on the document

- Cancelling Document in the 'For SA Approval' status and changing the status to 'NTA Preview'

3. AUTOMATED EMAILS

Throughout the PRS system, users will receive automated emails for various actions in the system. Below is a description when an automated email is sent and to whom it will be sent to.

All users can enable certain email notifications in the **Manage Notifications** section of the user's profile below.
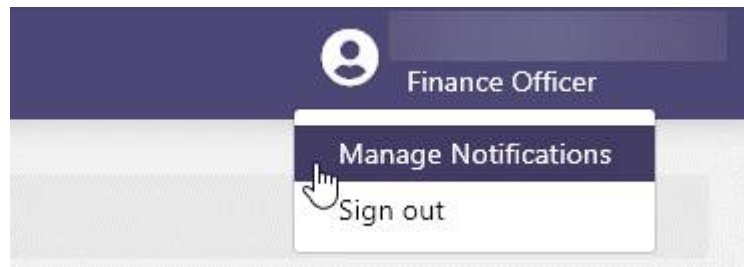
From here select required options and click save.
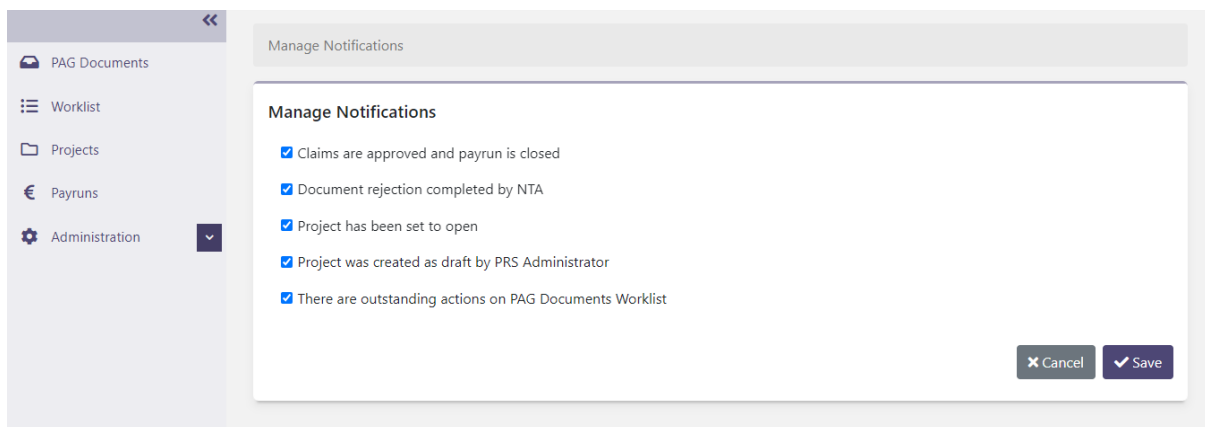
CLAIM REJECTED BY FINANCE OFFICER (NOT MANAGEABLE NOTIFICATION)

When is this email sent?
The email is sent when a claim has been rejected by the Finance Officer

Who receives this email?
This email is sent to the Claim Proposer and Sponsoring Agency Administrator for the Sponsoring Agency for which the claim has been rejected. The email will also include the rejection reason provided by the finance officer user who had rejected the claim.

CLAIM REJECTED BY NTA (NOT MANAGEABLE NOTIFICATION)

When is this email sent?

The email is sent when a claim has been rejected by a NTA Section Head, NTA Senior Programme Manage or NTA Programme Manager

Who receives this email?

This email is sent to all Claim Proposers, Finance Officers, and Sponsoring Agency Administrator for the Sponsoring Agency for which the claim has been rejected. The email will also include the rejection reason provided by the NTA user who had rejected the claim.

REMITTANCE SENT (NOT MANAGEABLE NOTIFICATION)

When is this email sent?

The email is sent when a remittance has been sent.

Who receives this email?

This email is sent to all Finance Officers, Claim Proposers and Sponsoring Agency Administrator for the Sponsoring Agency for which the remittance has been sent.

PROJECT ALLOCATION UPDATES (NOT MANAGEABLE NOTIFICATION)

When is this email sent?

The email is sent when a system administrator has updated the project allocation.

Who receives this email?

This email will be sent to the Sponsoring Agency Financial Officer and Sponsoring Agency Administrator, NTA Programme Manager and NTA Senior Programme Manager of the project.

PROJECT CREATED (NOT MANAGEABLE NOTIFICATION)

When is this email sent?

The email is sent when a system administrator has created a new project.

Who receives this email?

The email is sent to the Sponsoring Agency Financial Officers and Sponsoring Agency Administrators with CC to the projects NTA Programme Manager and NTA Senior Programme Manager.

PAYRUN CLOSED (MANAGEABLE NOTIFICATION)

When is this email sent?

The email is sent when a system administrator or capital finance officer as closed a payrun.

Who receives this email?

The email is sent to the Sponsoring Agency Financial Officers and Claim Proposers

with CC to the projects NTA Programme Manager and NTA Senior Programme Manager.

DOCUMENT REJECTION COMPLETED BY NTA (MANAGEABLE NOTIFICATION)

When is this email sent?
The email is sent when a document has been rejected by the NTA User

Who receives this email?
When rejection was completed during NTA approval process the notification will be send to all users that were involved in document approval process.

PROJECT WAS CREATED AS DRAFT BY PRS ADMINISTRATOR (MANAGEABLE NOTIFICATION)

When is this email sent?
The email is sent when a Project is created and saved as Draft by NTA Administrator

Who receives this email?

When the Project saved as Draft email is send to Sponsoring Agency Administrators with CC to NTA Programme Manager / NTA Senior Programme Manager with subject: 'New Draft Project Created on PRS'.

PROJECT HAS BEEN SET TO OPEN (MANAGEABLE NOTIFICATION)

When is this email sent?
The email is sent when a Project status changed to Open by Administrator/CPO Analyst/CPO Management

Who receives this email?

Once the project status changes from On Hold or directly to Open, there will be an email notification send to Project or Programme Managers, Director or Equivalent, Sponsoring Agency Administrator with CC to NTA Programme Manager / NTA Senior Programme Manager with subject: 'New Project Activated on PRS'.

OUTSTANDING ACTIONS ON PAG DOCUMENTS WORKLIST (MANAGEABLE NOTIFICATION)

When is this email sent?
The email is sent who have outstanding actions on PRS.

Who receives this email?

Individuals who have outstanding actions on PRS (Project or Programme Manager, Director or Equivalent).

[Note: This should only be for outstanding actions on forms]

4. PAG DOCUMENTS WORKLIST

When logging onto the external site the default landing page will be the Worklist. User has to click on PAG Documents tab from the left-hand menu.

PAG DOCUMENTS SEARCH.

The following search field filters are available to search Documents:

- Document ID
- Project Code
- Project Name
- Project Type
- Project Band
- Project Phase
- Document Deliverable
- Document Status (Note: This will be pre-set based on role but can be changed)
- Submission Date-From
- Submission Date-To
- Return records with comments not resolved

Once the desired search criteria are set the user has 2 options:

- Reset – Clear all search fields.
- Search – Display Results.

If all search fields are blank and the user clicks on 'Search' button, all the data available will be displayed to the user.

By default, the document status will be preselected depending on the role the user has logged into.

- For Sponsoring Agency Administrator, the Document status will be pre-set to '**Draft**'

- For Director or Equivalent the Document status will be pre-set to '**For SA Approval**'

- For Project or Programme Manager the Document status will be pre-set to '**Draft, NTA Preview**'

VIEW DOCUMENT DETAILS

Once a search has been performed and results are returned the user can view the document details by simply clicking anywhere on the line item. This will show the user the following details:

- Submitted By

- Submission Date

- Related Files

- Number of Comments not Resolved

- Approval Details

- Edit Action Icon

- History Icon

Results 628   [⬇ Export Grid]

Document ID	Project Code	Project Name	Project Type	Project Band	Project Phase	Document Deliverable	Document Status	Actions
1011	BE/19/0012	Planner	Capital Investment Project	test	Phase 6: Construction & Implementation, Phase 3: Preliminary Design	Project Funding Continuance Form	NTA Preview	✗ ✓
505	BE/19/0012	Planner	Capital Investment Project	test	Phase 6: Construction & Implementation, Phase 3: Preliminary Design	Project Funding Continuance Form	NTA Preview	✗ ✓

Submitted By   ✎ ⟳
-

Submission Date
-

Related File(s)
☑ BE-19-0012 - Planner-Project Funding Continuance Form

Number of Comments not Resolved
0

Approval Details

Document ID	Project Code	Project Name	Project Type	Project Band	Project Phase	Document Deliverable	Document Status	Actions
504	BE/19/0012	Planner	Capital Investment Project	test	Phase 6: Construction & Implementation, Phase 3: Preliminary Design	Project Funding Continuance Form	NTA Preview	✗ ✓
177	BE/19/0012	Planner	Capital Investment Project	test	Phase 6: Construction & Implementation, Phase 3: Preliminary Design	Allocation Adjustment Form	Draft	✗ ✓
88	BE/19/0012	Planner	Capital Investment Project	test	Phase 6: Construction & Implementation, Phase 3: Preliminary Design	Allocation Adjustment Form	NTA Preview	✗ ✓
46	BE/19/0012	Planner	Capital Investment Project	test	Phase 6: Construction & Implementation, Phase 3: Preliminary Design	Allocation Adjustment Form	Cancelled	

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DOCUMENT STATUS WORKFLOW
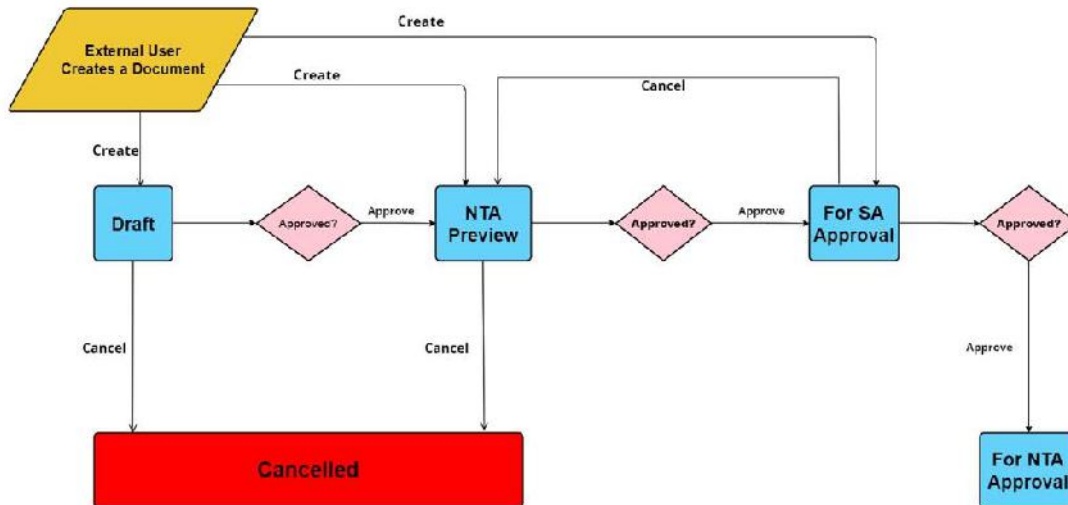
5. WORKLIST (CLAIMS)

When logging onto the external site the default landing page will be the Worklist. This is where all claims associated with the logged in users' projects will be located.

By default, this list will be pre-filtered depending on the role you have assigned.

- For Claim Proposer the Claim status will be pre-set to '**Draft**'

- For Finance Officer the Claim Status will be pre-set to '**For Finance Officer Verification'**

CLAIMS SEARCH

The following search fields are available to search claims:

- Claim Reference Number

- Project Code

- Project Name

- Category

- Claim Status *(Note: This will be pre-set based on role but can be changed)*

Once the desired search criteria are set the user has 2 options:

- Reset – Clear all search fields.

- Search – Display Results.

If all search fields are blank and the user performs a search the results will display all data available to the user.

VIEW CLAIM DETAILS

Once a search has been performed and results are returned the user can view the claim details by simply clicking anywhere on the line item. This will show the user the following details (where available):

- Category Details

- Claim Description.

- Document – it can be downloaded to user local machine.

- Verification Date – date when claim was verified by Finance Officer.

- Number of Comments – added against the claim.

- Payrun Number – populated when Claim is already Paid.

- Approval Date – date when claim was approved by NTA for payment.

- Paid Date – date when payrun was closed.

Claim Reference Number	Project Code	Project Name	Creation Date	Submitted By	Verified By	Status	Approved By	Total	Actions
16411	DOC/21/0004	Amiens St to Georges / City Quay Cycle Scheme	26/07/2021 10:51			Draft		€4,500.00	▢ ✓

Category Details
Design/Planning €1,500.00
Construction/Implementation €3,000.00

Claim Description
Claim description test

Document
PDF Test File.pdf

Verification Date

Number of Comments
0

Payrun Number

Approval Date

Paid Date
-

CLAIM STATUS WORKFLOW
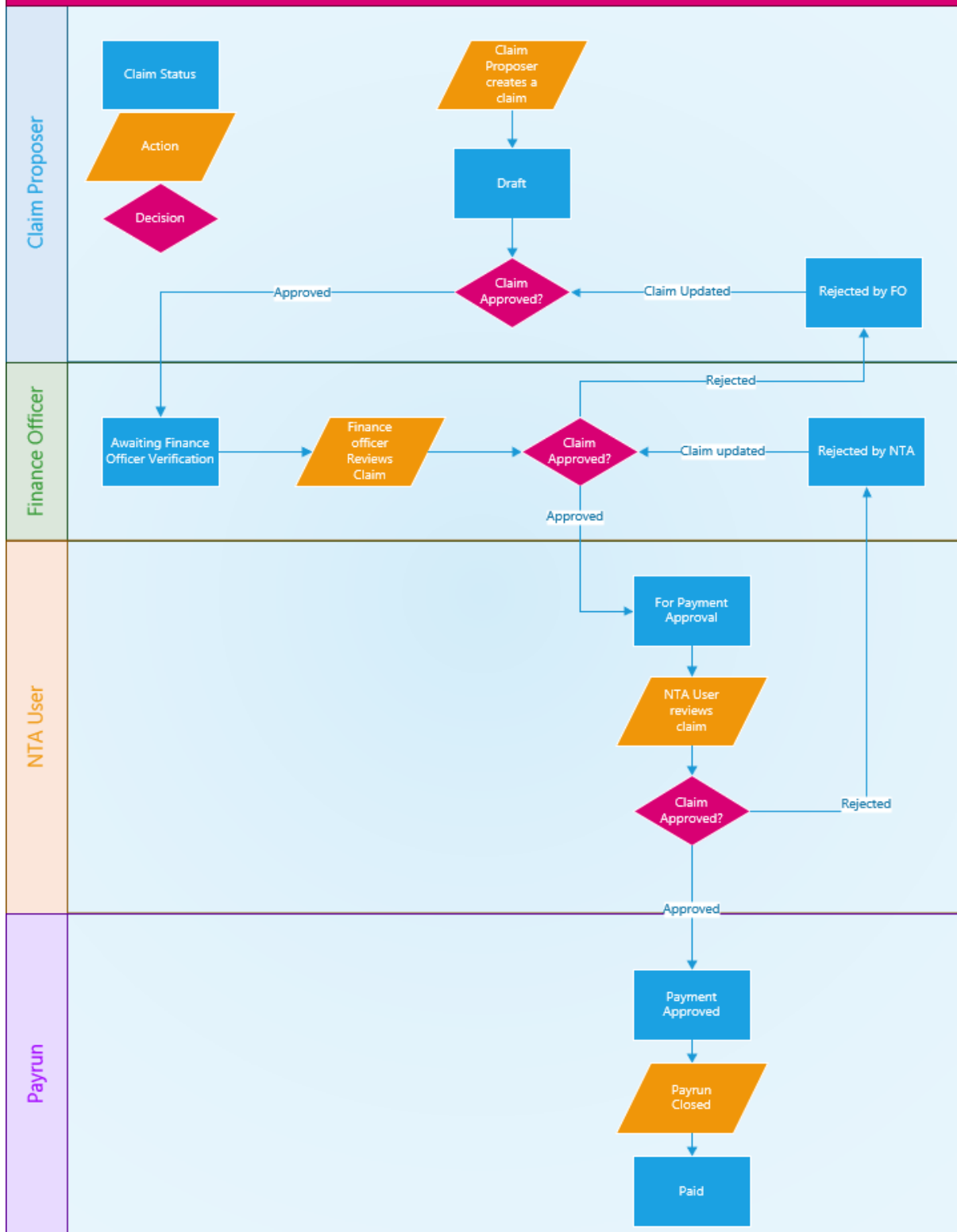
CREATE A CLAIM

As a **Claims Proposer** or **Sponsoring Agency Administrator** navigate to the projects section on the left navigation pane, search for a project and click to view the desired project via the actions menu.
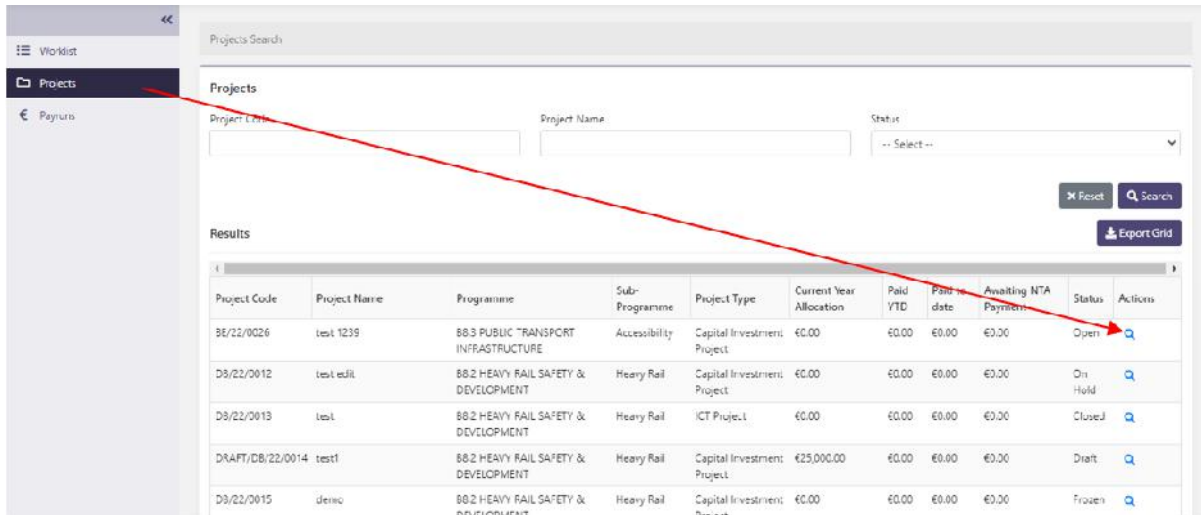
This will then open the project dashboard which will display all related claims by default, as well as allowing the user to select the **+Create New Claim** button.
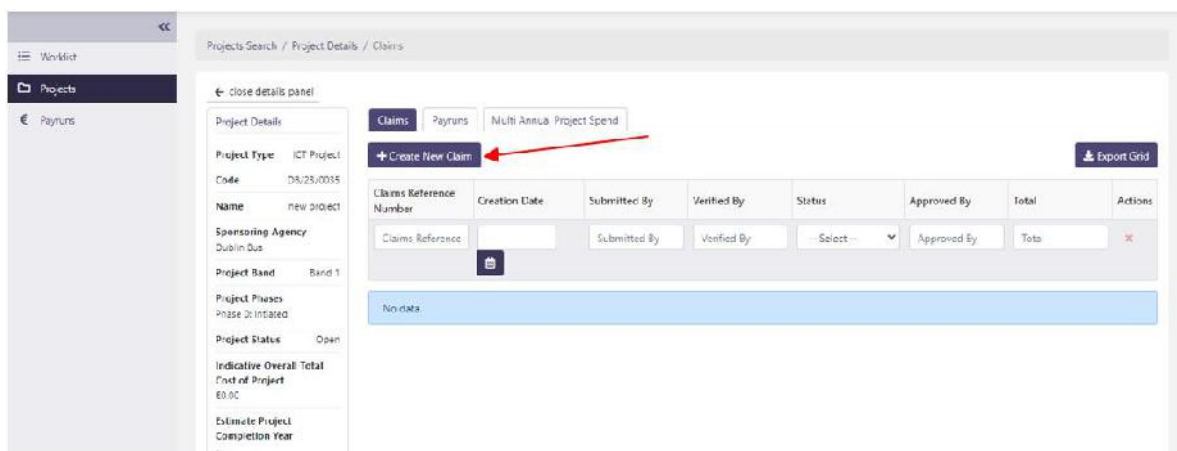
A pop-up will then be displayed to the user, allowing the user to enter the following information:

- Claim Reference Number - automatically generated incremental number.

- Category Details - mandatory drop-down with following values:

  - Design/Planning

  - Construction/Implementation

  - Land/Property

  - Other

- Amount - *mandatory field which accepts negative and positive amounts with up to 2 decimal places. Field is restricted to 20 characters and does not accept A-Z characters and special characters other than full stop.*

- Add Category Details – *Adds another row of category details and amount*

- Remove Category Details – *Removes a row of category details and amount. User cannot remove all rows and must have at least one.*

- Claim Description – *non-mandatory free text field restricted to 2000 characters.*

- Add Attachment – *User can 'Drag & Drop file from local machine or Browse' upload area. Accepted file types are *.msg, *.xls, *.xlsx, *.pdf, *.doc, *.docx, *.txt, *.jpg, *.png, *.dwg and *.bmp formats with a maximum size of 40 MB.*

Before continuing the user has two options via buttons at the bottom of the page:

- Cancel - Cancels the process and claim will not be saved.

- Save – *Saves the claim in 'Draft' status. The Claim can be saved only if the Allocation on the relevant project is >0. If there is not enough allocation on the project (i.e., Current Year Allocation on project is €10,000 and I input € 100,000 or €10,001 in Amount field) User will receive an error message saying 'Claim cannot be submitted. Please verify if Amount you input is lower or equal Current Year Allocation on this Project'*

EDIT CLAIM DETAILS

Claims will be available for the **Sponsoring Agency Administrator, Claims Proposer** or **Finance Officer** to edit. Only records in the following statuses will be available for editing:

- Draft

- For Finance Officer verification

- Rejected by FO

- Rejected by NTA

To do this the user performs a search and expands the details of the claim they wish to edit. Once expanded the user can select the '**Edit**' icon on the right side of the details window.

This will open a pop-up to edit the following details:

- Claim Reference Number

- Category Details
  - o Add Category Details
  - o Remove Category Details

- Amount

- Claim Description

- Add Attachment

Once all desired details are updated the user clicks **Save** to complete the edit.

Note: Required fields cannot be left blank when editing a claim. If details are not known the user can cancel the pop-up and edit later.

CLAIMS COMMENTS

Throughout the claims process comments may be added. These may be notes on approval/rejection, or simply general comments by the Claims Proposer or Finance Officer.

Comment visibility

- Claim comments from external users can be viewed by internal users but cannot be edited.

- Claim comments from external users can be edited by other external users. (All edits are captured in the comment history.).

VIEW COMMENTS.

To view the comments related to a claim the user performs a search and clicks on the **comments** icon under **actions**.

This will display a pop-up of all existing comments related to the claim.

ADD COMMENTS

To add a comment the user simply selects the **+Add Comment** button which will display a pop-up allowing the user to enter a comment along with the option to cancel or save.

EDIT COMMENTS

Once a comment has been submitted the user has the option to edit their comment. To do this the user needs to open the comment pop-up and click the **edit icon** under **actions**.

This will display a pop-up allowing the user to edit the comment details.

Comments

Please note that any comments below are visible to both your agency and the NTA

Comment *

This is a test comment edit

✕ Cancel   **✓ Save**

COMMENTS HISTORY

All edits made to comments are recorded in an audit history. To view this the user needs to open the comment pop-up and click the **history icon** under **actions**.

Comments

+ Add Comment

Comment Number	Created By	Created Date	Comment	Actions
8		26/07/2021 12:10	Test Comment	⟲ ✎

History

| 1 | 1-1 |

This will then display a filterable overview of all changes made to the comment.

Comment History

Change Type	Change Date	Created By	Actions
Select		Created By	✕
Comment Updated	26/07/2021 12:14:07		🔍
Comment Created	26/07/2021 12:10:58		🔍

The user can then click on the **view** icon under **actions.** This will display a 'before and after' view of any comment changes:

History Details

Change Type	Change Date
Comment Updated	26/07/2021 12:14

Created By

[redacted]

Details

BEFORE CHANGE	AFTER CHANGE
Comment	Comment
Test Comment	**Test Comment updated**

✕ Close

CLAIMS APPROVAL (CLAIMS PROPOSER)

Once a claim has been created it is left in draft status. To move the claim to **For Finance Officer Verification** status the **Claim Proposer** must approve the draft record first.

To do this the user selects the **approve icon** under the **actions** section for the record.

Claims

Claim Reference Number	Project Code	Project Name	Category
			-- Select --

Claim Status

Draft

✕ Reset   **Q Search**

Results

Claim Reference Number	Project Code	Project Name	Creation Date	Submitted By	Verified By	Status	Approved By	Total	Actions
120	TA/SC/19/0001	Jewelery & Books	19/07/2021 08:06			Draft		€50.00	📄 ✓
116	TA/SC/19/0001	Jewelery & Books	06/07/2021 09:26			Draft		€10.00	📄 ✓
115	TA/SC/19/0001	Jewelery & Books	05/07/2021 15:49			Draft		€100.00	📄 ✓
114	TA/SC/19/0001	Jewelery & Books	05/07/2021 15:41			Draft		€1,600.00	📄 ✓

The system will display an alert before moving the status, allowing the user to cancel the action or to agree and proceed. Once **Yes** is clicked the status of the claim will move to **For Finance Officer Verification** status.

Approve Claim

⚠ I hereby confirm that all amounts included in this submission have been incurred in line with the terms agreed with NTA, have been checked in full and are accurately recorded.

This claim should be approved for further actions.
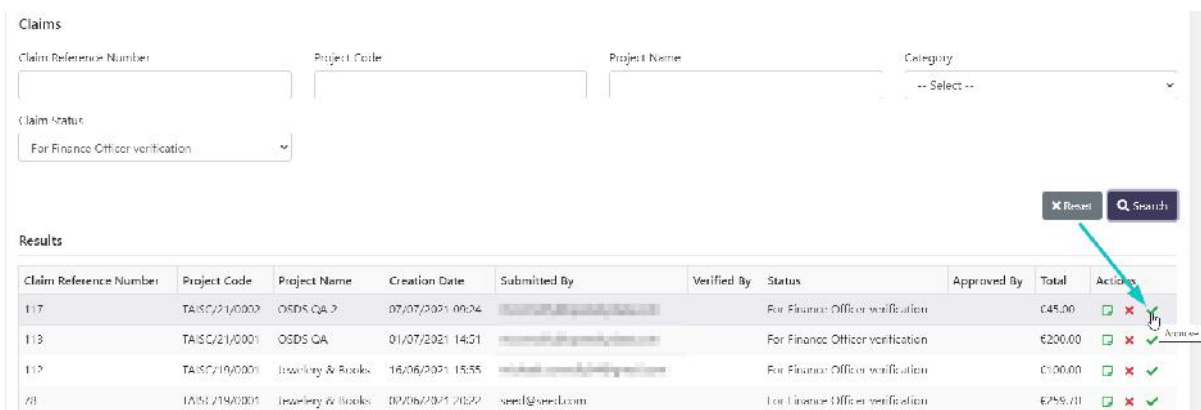
✕ No   **✓ Yes**

CLAIMS APPROVAL (FINANCE OFFICER)

After the Claim Proposer has created and approved the draft claim it is moved to **For Finance Officer Verification** status.

When the Finance Officer logs in they are automatically brought to the Worklist section with the claims status of **For Finance Officer Verification** pre-set. Here they can see all claims awaiting review.

To approve a claim the user simply selects the **Approve icon** under the **actions** section for the record.

The system will display an alert before moving the status, allowing the user to cancel the action or to agree and proceed. Once **Yes** is clicked the status of the claim will move to **For Payment Approval** status and will be reviewed by Internal PRS users.

CLAIMS REJECTION

Any claim in the status **For Finance Officer Verification** can also be rejected after review by the finance Officer and sent back to the Claim Proposer for further support/clarification.

To Reject a claim the user simply selects the **Reject icon** under the **actions** section for the record.

The system will display a pop-up requiring the user to provide a rejection reason before moving the status, allowing the user to cancel the action or to save and proceed. Once the rejection reason is provided and **Save** is clicked the status of the claim will move to **Rejected by FO** status.

The record can then be accessed again by the Claim Proposer to review any comments from the Finance Officer, make any changes that may be required and approve once again to send to the Finance Officer again to review changes.

CLAIMS HISTORY

All actions taken on a claim are recorded in an audit history. To view this the user needs to expand the details of the claim by selecting the line item & clicking the **history icon** under **actions**.

Clicking the history icon will present the user with a pop-up covering all changes to the claim.

Clicking on the '**Magnifying Glass'** icon will present another pop-up detailing what changes were made in greater detail.

History Details

Change Type	Change Date
Claim Updated	09/06/2021 15:55

Created By

▓▓▓▓▓▓▓▓▓

Details

BEFORE CHANGE	AFTER CHANGE
Description	**Description**
Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia Curae; Donec velit neque, auctor sit amet aliquam vel, ullamcorper sit amet ligula. Curabitur aliquet quam id dui posuere blandit. Pellentesque in ipsum id orci porta dapibus. Vestibulum ac diam sit amet quam vehicula elementum sed sit amet dui.	Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia Curae; Donec velit neque, auctor sit amet aliquam vel, ullamcorper sit amet ligula. Curabitur aliquet quam id dui posuere blandit. Pellentesque in ipsum id orci porta dapibus. Vestibulum ac diam sit amet quam vehicula elementum sed sit amet dui. UPDATED

✖ Close

6. PROJECTS

PROJECT DETAILS PANEL

On the left-hand side will be a Project details panel which will contain all important information for the selected project. This is split into 4 sub-sections

- Project Details
- Summary
- Scheme and Management
- Grant Application Details
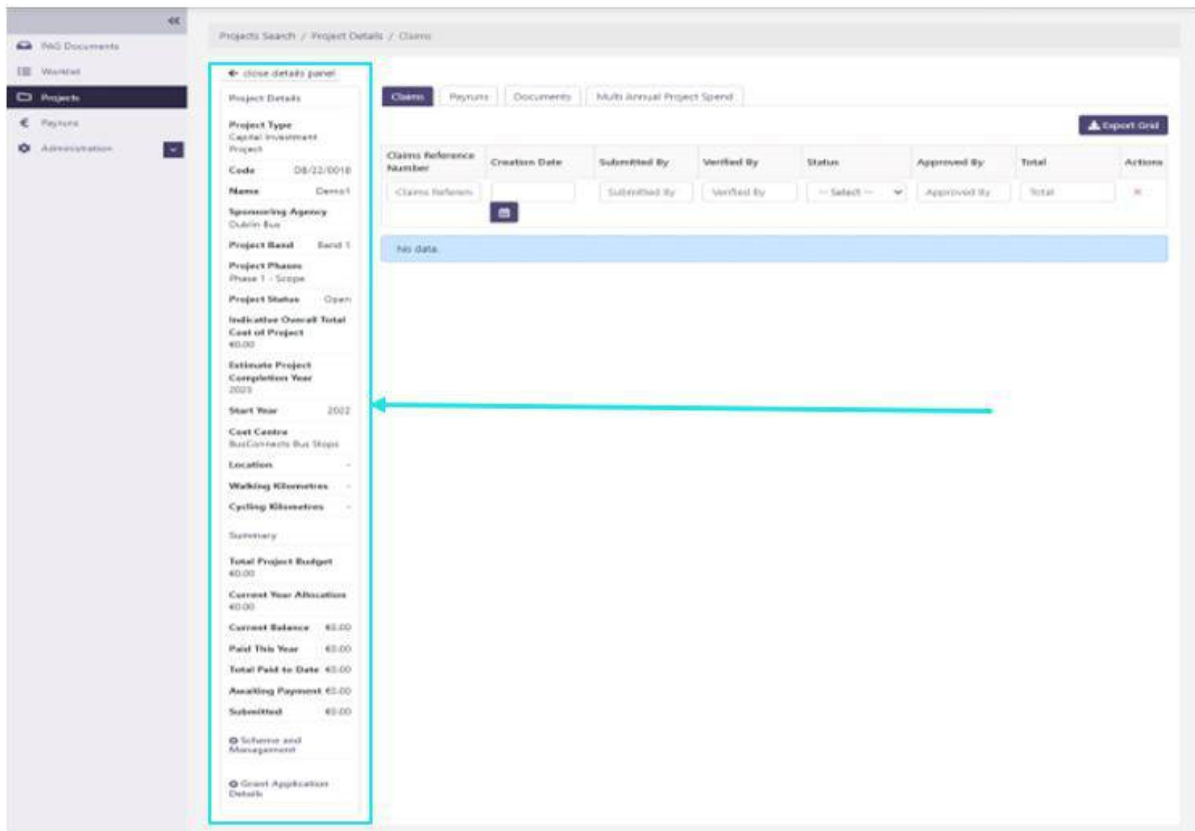
Project Details

Project Type
The project type will be one of 2 options

- Capital investment project
- ICT Project

Code
The unique code assigned to the project. This is a combination of the sponsoring agency, the year the project was created followed by a 4-digit number.
Example NTA/21/0001

Name
Project name

Sponsoring Agency
The sponsoring agency assigned to the project

Project Band

The current band which the project is currently in. This can be one of the following:

- Band 1

- Band 2

- Band 3

Project Phase

The current phase which the project is currently in. This can be one of the following:

- For Band 1 - Capital Investment Projects

    o Phase 1: Scope and Purpose

    o Phase 2-5: Combined

    o Phase 6-7: Combined

- For Capital Investment Projects

    o Phase 1: Scope and Purpose

    o Phase 2: Concept Development & Option Selection

    o Phase 3: Preliminary Design

    o Phase 4: Statutory Process

    o Phase 5: Detailed Design & Procurement

    o Phase 6: Construction & Implementation

    o Phase 7: Close-out & Review

    o N/A

- For ICT Projects:

    o Phase 0: Concept

    o Phase 1: Initiation

    o Phase 2: Planning

    o Phase 3: Procure

    o Phase 4: Analysis & Design

    o Phase 5: Build & Test

    o Phase 6: Deploy/Rollout

    o Phase 7: Hand over & BAU

    o Phase 8: Post Project Benefits Review

    o N/A

Project Status

The current project status can be one of the following:

- Draft

- On Hold

- Open

- Closed

- Frozen

Indicative Overall Total Cost of Project
The current estimated overall cost of the project.

Estimate Project Completion Year
The current estimated project completion year

Start Year
The year the project is proposed to start.

Cost Centre
The assigned cost centre assigned to the project. For example:

- Rural Hackney Service

- Leap Capital Projects

- Public Transport contracts & licensing (Bus & Rail)

Location
Location details provided during submission of the Grant Application Form. This information is filled only for the Capital Investment Projects

Walking Kilometres
Walking Kilometres details provided during submission of the Grant Application Form. This information is filled only for the Capital Investment Projects

Cycling Kilometres
Cycling Kilometres details provided during submission of the Grant Application Form. This information is filled only for the Capital Investment Projects

Summary

Total Project Budget
This is the total project budget assigned to the project.

Current Year Allocation
The projects overall budget for the current year.

Current Balance
The remaining balance for the current year of the project. This will be the 'Current Year Allocation' minus the total value of claims for the project in For Payment Approval, Payment Approved or Paid status.
If a Claim in 'For Payment Approval' status is subsequently rejected by the NTA user, the claim amount value will be re-allocated back to the Current Balance.

Paid This Year
The total value of claims for the project in 'Paid' status for the current year.

Total Paid to Date
The total value of claims for the project in 'Paid' status for the entire duration of the project.

Awaiting Payment
The total value of claims in 'Payment Approved' status.

Submitted
The total value of claims in "For Payment Approval" status.

Scheme and Management (Can be expanded or minimised using the ⊕ or ⊖ icons)

Programme
The current programme of the project

Sub-Programme
The current sub-programme of the project

Classification
The current classification of the project

NTA Programme Manager
The assigned NTA programme manager user

NTA Senior Programme Manager
The assigned NTA senior programme manager user

NTA Section Head
The assigned NTA section head user

Project or Programme Manager

The assigned sponsoring agency project or programme manager.

Director or Equivalent

The assigned sponsoring agency director or equivalent.

Grant Application Details (Can be expanded or minimised using the ⊕ or ⊖ icons)

Project Description

Original Indicative Overall Total Cost of Project
This is the original Indicative overall total cost of the project excluding any updates or changes to the original value.

Original Estimate Project Completion Year
Original estimated project completed year excluding and updates made to the original value

Projects in the PRS system are generated by the NTA team and accessible by Sponsoring Agencies users via the projects section on the left navigation pane.
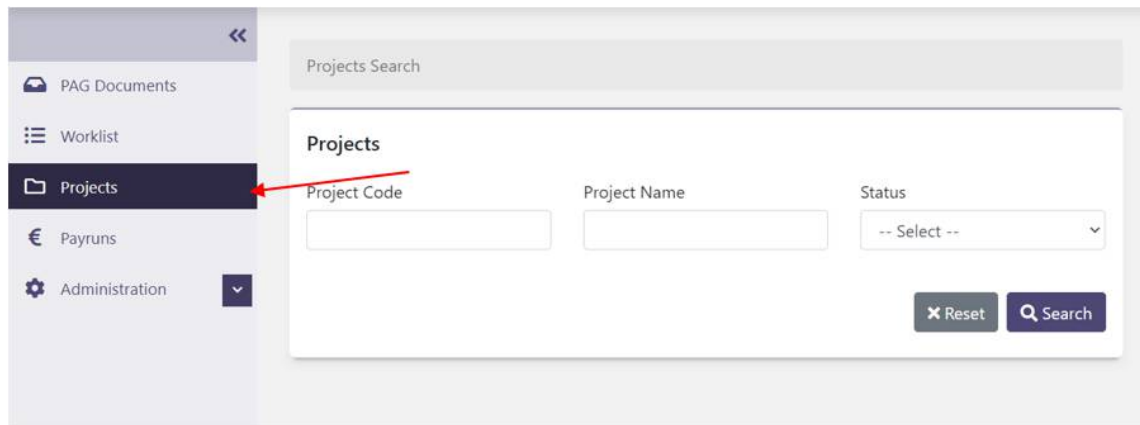
PROJECT SEARCH

When the projects section is selected the user is presented with a search screen. The following criteria is available for searching:

- Project Code
- Project Name
- Status
    - o Draft
    - o On Hold
    - o Open
    - o Closed
    - o Frozen

Alternatively, the user can click the search icon with no data in the search fields to see all available projects.
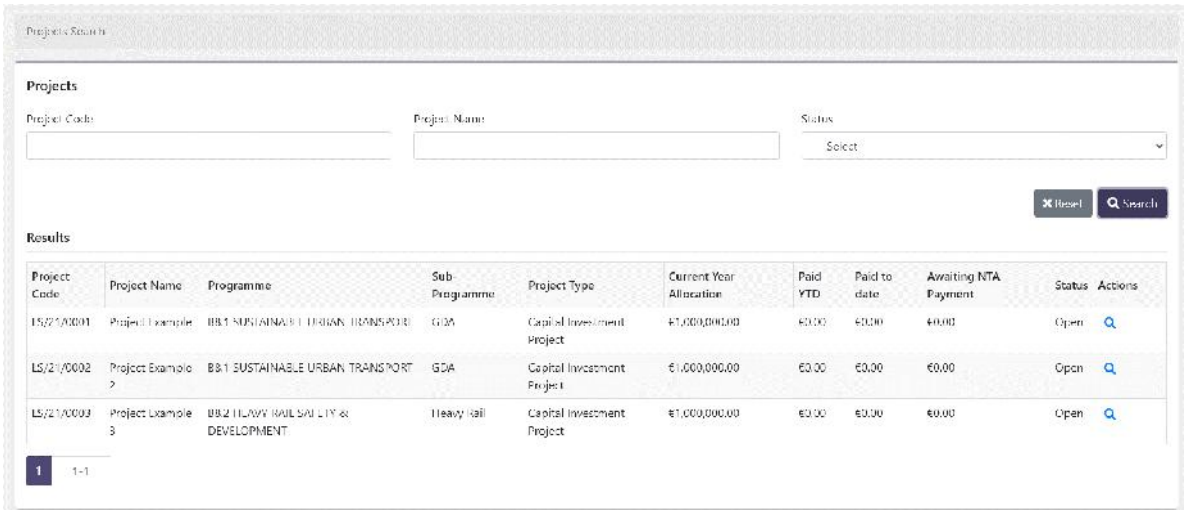
PROJECT NAVIGATION

Once the user has performed a search and found the desired project the user can click on the 'magnifying glass' icon located on the right side of the page to open the project dashboard.
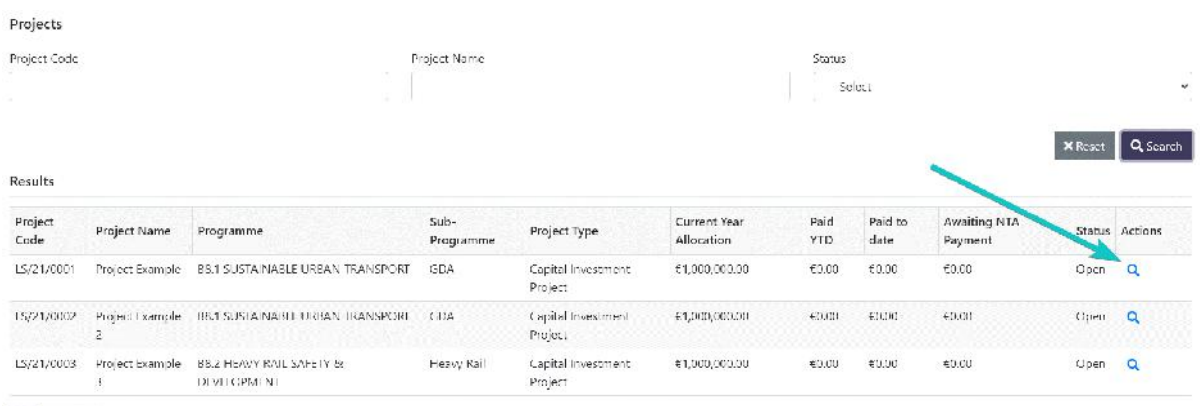
The system then displays the project dashboard which contains all project details, associated claims, payruns, documents & project spends.

VIEW CLAIMS

When opening the project dashboard, the claims tab will be opened by default. This will show all claims within the project but can be filtered if required. The following search fields are available for filtering:

- Claims Reference Number
- Category
- Creation Date
- Submitted by
- Verified by
- Status
- Approved by
- Total

VIEW PAYRUNS & ASSOCIATED CLAIMS

To view any payruns associated with the project, select the Payruns tab at the top of the page. By default, this will show all payruns associated with the project but can be filtered with the following search fields:

- Payrun Number

- Paid Date

- Claim Reference Number

- Total Paid

DOCUMENTS TAB

To view any Documents associated with the project, select the Documents tab at the top of the page. By default, this will show all documents associated with the project but can be filtered with the following search fields:

- Document ID

- Document Deliverable

- Document Status

- Actions

REVIEW MULTI ANNUAL PROJECT SPEND

The multi annual project spend tab, offers users the ability to view project allocations, year end spend and balance on a per year basis.

To view the multi annual project spend for a project, select the last tab at the top of the page. This will give an overview of Allocations at year end, year-end spend and the remaining balance. This will be split by year.

7. PAYRUNS

Payruns are available via the Payrun tab on the left navigation pane or within a specific project via the tab on the project dashboard. Payruns group all claims approved for payment in a biweekly period.

PAYRUNS SEARCH

The following search fields are available to search payruns:

- Payrun Number
- Project Code
- Project Name
- Claim Reference Number
- Date Paid – From
- Date Paid – To

Once the desired search criteria are set the user has 2 options:

- Reset – Clear all search fields.
- Search – Display Results.

If all search fields are blank and the user performs a search the results will display all data available to the user.

VIEW CLAIMS IN PAYRUN

Once a successful search is performed the user can click on the **View Claims** button under the **actions** section of the claim.

Clicking on this will present the user with a pop-up to view all claims contained within the payrun.

8. FILL THE FORM – GRANT APPLICATION FORM

As an External User with relevant permissions, to create a 'Grant Application Form' go to 'PAG Documents' and click on 'Fill the Form' button on the top right corner of the page.

Click on the 'Fill the Form' button. The system shows an Online Form Selection pop-up with 'Please choose the form you would like to fill' and following options on the drop-down below:

- Grant Application Form – pre-selected
  - Click on the 'Fill the Form' button.

If the user wants to cancel the Grant Application Form, click on the **'Cancel'** Button.

Online Form Selection

Please choose the form you would like to fill:

Grant Application Form ⌄

The NTA 'Grant Application Form' should be used for all Capital Funding Applications for new projects funded by NTA's Capital Programme for the first time.

✕ Cancel   **☑ Fill the Form**

After clicking on the 'Fill the Form' button system shows a Grant Application Form with 7 sections.

SECTION 1 – PROJECT DESCRIPTION AND FULL DESCRIPTION OF WORKS PROPOSED

User can enter Project description and full description of the works proposed in the following fields:

- Project Name – Mandatory free text field, restricted to 100 characters
- Project Type – mandatory drop-down with following values listed:
    - Capital Investment Project
    - ICT Project
- Agency Project or Programme Manager – Mandatory drop-down with agency users with 'Project or Programme manager' role
- Agency Director or Equivalent- Mandatory drop-down with agency users with 'Director or Equivalent' role
- Programme
- Sub-Programme
- Classification
- Description - Restricted to 5000 characters

- Field to upload file - (User can be able to upload multiple files in *.msg, *.xls, *.xlsx, *.pdf, *.doc, *.docx, *.txt, *.jpg, *.png, *.dwg and *.bmp formats and able to upload single attachment with maximum size of 40 MB)

SECTION 2 – DESCRIPTION OF PROJECT BENEFITS

User can enter description of project benefits in the following fields:

- Description - Restricted to 5000 characters

- Field to upload file - (User can be able to upload multiple files in *.msg, *.xls, *.xlsx, *.pdf, *.doc, *.docx, *.txt, *.jpg, *.png, *.dwg and *.bmp formats and able to upload single attachment with maximum size of 40 MB)

SECTION 3 – CONSISTENCY WITH PLANS

User can enter Consistency with plans in the following fields:

- o Location
- o Walking Kilometres
- o Cycling Kilometres

- Description - Restricted to 5000 characters

- Field to upload file - (User can be able to upload multiple files in *.msg, *.xls, *.xlsx, *.pdf, *.doc, *.docx, *.txt, *.jpg, *.png, *.dwg and *.bmp formats and able to upload single attachment with maximum size of 40 MB)

[Note: Location, Walking Kilometres, Cycling Kilometres fields are available when Project Type selected as Capital Investment Project in Section-1]

SECTION 4 – FINANCIAL INFORMATION

User can enter financial information in the following fields:

➢ **Single year project**
- Indicative Overall Total Cost of Project/Programme

- Comments

- Is this project part of a previous NTA funded project/programme?

  - o Yes

    - NTA Contribution Date
    - Comments

  - o No

- Is this project part of a previous NTA funded project/programme?
    - Yes
        - Co-funding/self-funding to date
        - Comments
    - No
- Funding Sought from NTA (current calendar year only)
- Co-funding/self-funding (current calendar year only)
- Section Summary

[Note: If 'Total Estimate' for 'Total Indicative Project/Program Cost' is not equal to 'Total Indicative Project/Program Cost', the error message will appear under the

table]

NTA PRS

stevejack25@gmail.com
Project or Programme Manager

Projects Search / Project Details / Documents / Project Grant Application Form

- PAO Documents
- Worklist
- Projects
- Payruns

Project Grant Application Form

(1)─(2)─(3)─**(4)**─(5)─(5)─(7)

Section 4 - Financial Information

The application should clearly identify key indicative cost information.
Please follow the NTA's Cost Management Guidelines for Capital Projects
It should be noted that should approval be granted, funding is solely secured for the current year. Future year(s) required funding should be captured in the standard annual budget process and cycle(s).
All cost figures above should include irrecoverable VAT.

Please select if this project is a single year project (i.e. funding applied for and project completed within the current calendar year) or multi annual project (i.e. project lifecycle over more than one calendar year)

- ● Single year project
- ○ Multi annual project

Indicative Overall Total Cost of Project / Programme ❓
(€ EUR) *

€ 400.00

Comments*

test

Is this project part of a previous NTA funded project/programme?

- ● Yes
- ○ No

NTA contribution to Date (€ EUR) *

€ 100.00

Comments*

test

Has there been any co-funding/self-funding to date?

- ● Yes
- ○ No

Co-funding/self-funding to date (€ EUR) *

€ 100.00

Comments*

test

Funding Sought from NTA (€ EUR)*	Co-funding/self-funding (€ EUR)*
(current calendar year only)	(current calendar year only)
€ 50.00	€ 100.00

Section Summary

Year	Funding sought from NTA	Co-funding/self-funding	Calculated indicative overall total cost of project / programme
Previous Funding	€100.00	€100.00	€200.00
Current Calendar Year	€50.00	€100.00	€150.00
Total Estimated	€150.00	€200.00	€350.00

⚠ The Total Estimated €350.00 is not equal to the value provided in Indicative Overall Total Cost of Project / Programme field.

< Back | ⬇ Download the Form ▾ | ✖ Cancel | ✔ Save as a Draft | ✔ Submit for NTA Preview | ✔ Submit for Final Approval | > Next

Section Comments

Comment

📝 Save Comment for this Section

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Project Grant Application Form

(1)-(2)-(3)-(4)-(5)-(6)-(7)

Section 4 - Financial Information

> The application should clearly identify key indicative cost information.
> Please follow the NTA's Cost Management Guidelines for Capital Projects.
> It should be noted that should approval be granted, funding is solely secured for the current year. Future year(s) required funding should be captured in the standard annual budget process and cycle(s).
> All cost figures above should include irrecoverable VAT.

Please select if this project is a single year project (i.e. funding applied for and project completed within the current calendar year) or multi annual project (i.e. project lifecycle over more than one calendar year)

● Single year project
○ Multi-annual project

Indicative Overall Total Cost of Project / ❶
Programme (€ EUR) *

€ XXX

Comments *

Please comment on your key assumptions relating to the "indicative overall total cost of project/programme" provided

Is this project part of a previous NTA funded project/programme?

● Yes
○ No

NTA contribution to Date (€ EUR) *

€ XXX

Comments *

If NTA has contributed to date please advise which existing project/programme this was previously funded under

Has there been any co-funding/self-funding to date?

● Yes
○ No

Co-funding/self-funding to date (€ EUR) *

€ XXX

Comments *

Please advise the source(s) of the co-funding/self-funding

Funding Sought from NTA (€ EUR) *   Co-funding/self-funding (€ EUR) *
(current calendar year only)   (current calendar year only)

€ XXX   € XXX

Section Summary

Year	Funding sought from NTA	Co-finding/self-funding	Calculated indicative overall total cost of project / programme
Previous Funding	€0.00	€0.00	€0.00
Current Calendar Year	€0.00	€0.00	€0.00
Total Estimated	€0.00	€0.00	€0.00

‹ Back | ⬇ Download the Form ▾ | ✖ Cancel | ✔ Save as a Draft | ✔ Submit for NTA Preview | ✔ Submit for Final Approval | › Next

Sidebar

- PAG Documents
- Worklist
- Projects
- € Payruns
- ⚙ Administration

50

- ➤ **Multi-annual project**
  - Indicative Overall Total Cost of Project/Programme

  - Comments

  - Is this project part of a previous NTA funded project/programme?
    - o Yes
      - ▪ NTA Contribution Date
      - ▪ Comments
    - o No

  - Is this project part of a previous NTA funded project/programme?
    - o Yes
      - ▪ Co-funding/self-funding to date
      - ▪ Comments
    - o No

  - Funding Sought from NTA (current calendar year only)

  - Co-funding/self-funding (current calendar year only)

  - Add funding for another year
    - o Year
    - o Funding Sought from NTA for selected year
    - o Co-funding/self-funding for selected year

  - Section Summary

PAG Documents

Worklist

Projects

Payruns

Administration

Project Grant Application Form

①—②—③—**④**—⑤—⑥—⑦

Section 4 - Financial Information

The application should clearly identify key indicative cost information.
Please follow the NTA's Cost Management Guidelines for Capital Projects.
It should be noted that should approval be granted, funding is solely secured for the current year. Future year(s) required funding should be captured in the standard annual budget process and cycle(s).
All cost figures above should include irrecoverable VAT.

Please select if this project is a single year project (i.e. funding applied for and project completed within the current calendar year) or multi annual project (i.e. project lifecycle over more than one calendar year)

○ Single year project
● Multi-annual project

Indicative Overall Total Cost of Project / ❶
Programme (€ EUR) *

€ X.XX

Comments *

Please comment on your key assumptions relating to the "indicative overall total cost of project/programme" provided

Is this project part of a previous NTA funded project/programme?

● Yes
○ No

NTA contribution to Date (€ EUR) *

€ X.XX

Comments *

If NTA has contributed to date please advise which existing project/programme this was previously funded under

Has there been any co-funding/self-funding to date?

● Yes
○ No

Co-funding/self-funding to date (€ EUR) *

€ X.XX

Comments *

Please advise the source(s) of the co-funding/self-funding

Funding Sought from NTA (€ EUR) *	Co-funding/self-funding (€ EUR) *
(current calendar year only)	(current calendar year only)
€ X.XX	€ X.XX

Year *	Funding Sought from NTA for selected year (€ EUR) *	Co-funding/self-funding for selected year (€ EUR) *
-- Select -- ▾	€ X.XX	€ X.XX

+ Add Funding for Another Year

Section Summary

Year	Funding sought from NTA	Co-funding/self-funding	Calculated indicative overall total cost of project / programme
Previous Funding	€0.00	€0.00	€0.00
Current Calendar Year	€0.00	€0.00	€0.00
	€0.00	€0.00	€0.00
Total Estimated	€0.00	€0.00	€0.00

Comments *

Please provide commentary on the activity of the multi-annual funding such as when construction is due to commence, milestone payments due in a certain year, etc.

‹ Back ⬇ Download the Form ▾ ✕ Cancel ✔ Save as a Draft ✔ Submit for NTA Preview ✔ Submit for Final Approval › Next

SECTION 5 – CURRENT YEAR PROJECT/PROGRAMME PHASE

User can enter Current year Programme/project Phase in the following fields:

- Project Band (based on Indicative Overall Total Cost of Project/Programme)

- Select current phase(s) of the project from dropdown list

  - For Capital Investment Projects (or matching the values in Manage PAG Settings):

    - Phase 1: Scope and Purpose
    - Phase 2: Concept Development & Option Selection
    - Phase 3: Preliminary Design
    - Phase 4: Statutory Process
    - Phase 5: Detailed Design & Procurement
    - Phase 6: Construction & Implementation
    - Phase 7: Close-out & Review
    - N/A

  - For ICT Projects (or matching the values in Manage PAG Settings):

    - Phase 0: Concept
    - Phase 1: Initiation
    - Phase 2: Planning
    - Phase 3: Procure
    - Phase 4: Analysis & Design
    - Phase 5: Build & Test
    - Phase 6: Deploy/Rollout
    - Phase 7: Hand over & BAU
    - Phase 8: Post Project Benefits Review
    - N/A

- Description – Restricted to 5000 characters

- Field to upload file - (User can be able to upload multiple files in *.msg, *.xls, *.xlsx, *.pdf, *.doc, *.docx, *.txt, *.jpg, *.png, *.dwg and *.bmp formats and able to upload single attachment with maximum size of 40MB)

[Note: Project Band and Project Phase are available when Project Type selected as Capital Investment Project/ICT Project in Section-1]

SECTION 6 – STATUTORY APPROVALS STATUS

User can enter Statutory Approval Status in the following fields:

- Description – Restricted to 5000 characters

- Field to upload file- (User can be able to upload multiple files in *.msg, *.xls, *.xlsx, *.pdf, *.doc, *.docx, *.txt, *.jpg, *.png, *.dwg and *.bmp formats and able to upload single attachment with maximum size of 40MB)

SECTION 7 – CONTACT PERSONS

User can enter Contact person's details in the following fields:

- Contact Type

- Name

- Job Title

- Contact Number

- Email Address

- Add Another Contact Person

FORM NAVIGATION

Cancelling the Grant Application Form filling:

User can click on '**Cancel'** button at the bottom of the page.

Navigate between the Sections in Grant Application Form:

User can click on the '**Next**' button to go to next Section.

User can click on the '**Back**' button to go to previous Section.

*[Note: **Back** button will be inactive when the user is in the first section, **Next** button will be inactive in the last section]*

User can save the document in draft by clicking on '**Save as Draft**' button.

After clicking on the Save as Draft button, new Project is created, and document is saved in 'Draft' status. Documents in Draft status are not visible to NTA.

User can save the document for NTA Preview by clicking on '**Submit for NTA Preview**' button.

After clicking on the Submit for NTA Preview button, new Project is created, and document is saved in 'NTA Preview' status. Documents in NTA Preview status are visible to NTA.

User can submit the form as final for Agency and NTA Approval by clicking on '**Submit for Final Approval'** button**.**

[Note: Must fill all mandatory fields before submitting the form]

After clicking on the Submit for Final Approval button, new Project is created, and document is saved in 'For SA Approval' status.

Note: '**Submit for Final Approval**' button is only visible if the designated 'Project or Programme Manager' or 'Director or Equivalent' chooses themselves as the designated Project or Programme Manager/Director or Equivalent. If the user chooses another Project or Programme Manager/Director or Equivalent, they will no longer have access to the 'Submit for Final Approval' button.

Similarly, if the user clicks on the '**Submit for NTA Preview**' button while choosing another Project or Programme Manager/Director or Equivalent as designated, they will no longer have access to it.

If access is required or the designated Project or Programme Manager/Director or Equivalent need to be reassigned, the user can contact Agency Administrator to get the access.

 User can download the form by clicking on '**Download the Form**' button.

[Note: user can download the form in *.docx or *.pdf format]

9. FILL THE FORM – PROJECT FUNDING CONTINUANCE FORM

As an External User with relevant permissions, to create a 'Project Funding Continuance Form' go to the Projects section and search for the chosen project and navigate to Documents tab.

Click on the 'Fill the Form' button. The system shows an Online Form Selection pop-up with 'Please choose the form you would like to fill' and following options on the drop-down below:

- Allocation Adjustment Form

- Grant Application Form

- Project Funding Continuance Form

Select **'Project Funding Continuance Form'** from Online Form Selection drop-down and click on Fill the Form button.

User can cancel the Project Funding Continuance Form by clicking on the **'Cancel'** Button'.

After clicking on the 'Fill the Form' button system shows a '**Project Funding Continuance Form'** with 3 sections.

SECTION 1 – CURRENT COSTS

User can enter the Current costs fields which are mentioned below

- Cumulative grant funding paid to date – read only information with sum of all paid Claims on this project to date.

- Funding requested for current year- Field is restricted to 16 Characters and does not approve '0' amount.

- Self-funded amount- - Field is restricted to 16 Characters and approve '0' amount.

[Note: Funding requested for current year field is blocked if in current year the allocation on related project was already updated and is not set to 0]

SECTION 2 – CURRENT STATUS OF PROJECT

User can enter the Current Status of Project fields which are mentioned below

- Description – Field is restricted to 5000 characters

SECTION 3 – DESCRIPTION OF WORKS TO BE UNDERTAKEN WITH REQUESTED FUNDING

User can enter the Current Status of Project fields which are mentioned below

- Select Current Phase(s) – multi-selectable drop-down with phases relevant to this project

- Description – Field is restricted to 5000 characters

- Field to upload file- (User can be able to upload multiple files in *.msg, *.xls, *.xlsx, *.pdf, *.doc, *.docx, *.txt, *.jpg, *.png, *.dwg and *.bmp formats and able to upload single attachment with maximum size of 40 MB)

10. FILL THE FORM – ALLOCATION ADJUSTMENT FORM

As an External User with relevant permissions, to create a 'Project Funding Continuance Form' go to the Projects section and search for the chosen project and navigate to Documents tab.

Click on the 'Fill the Form' button. The system shows an Online Form Selection pop-up 'Please choose the form you would like to fill' with following options on the drop-down below:

- Allocation Adjustment Form
- Grant Application Form
- Project Funding Continuance Form

Online Form Selection

Please choose the form you would like to fill:

| Allocation Adjustment Form | ⌄ |

Allocation Adjustment Form is used solely to seek approval for an allocation adjustment in the current year and not an estimated change in the total/ multi-annual cost of the project. The Sponsoring Agency should engage with their associated NTA Programme Manager or NTA Senior Programme Manager on any allocation adjustment requirements before submitting the form for final approval.

✖ Cancel   ☑ Fill the Form

Select **'Allocation Adjustment Form'** from Online Form Selection drop-down and click on Fill the Form button, after clicking on the 'Fill the Form' button system shows an Allocation Adjustment Form.

The system will show a screen with following fields:

- Existing Allocation – It is non editable value with Current Year Allocation saved on the project while filling the form
- Adjustment Value – Restricted to 16 characters
- New Allocation (€ EUR) – field will calculate the value based on the Existing Allocation + Adjustment Value.
- Reason – Restricted to 2000 characters

13. FORMS MANAGEMENT

As an external user with relevant permissions, user would like to review, edit, cancel, and approve all documents related with a chosen project.

DOCUMENTS TAB

As an External user with relevant permissions navigate to the projects section on the left navigation pane, search for a project and click to view the desired project via the action's menu.
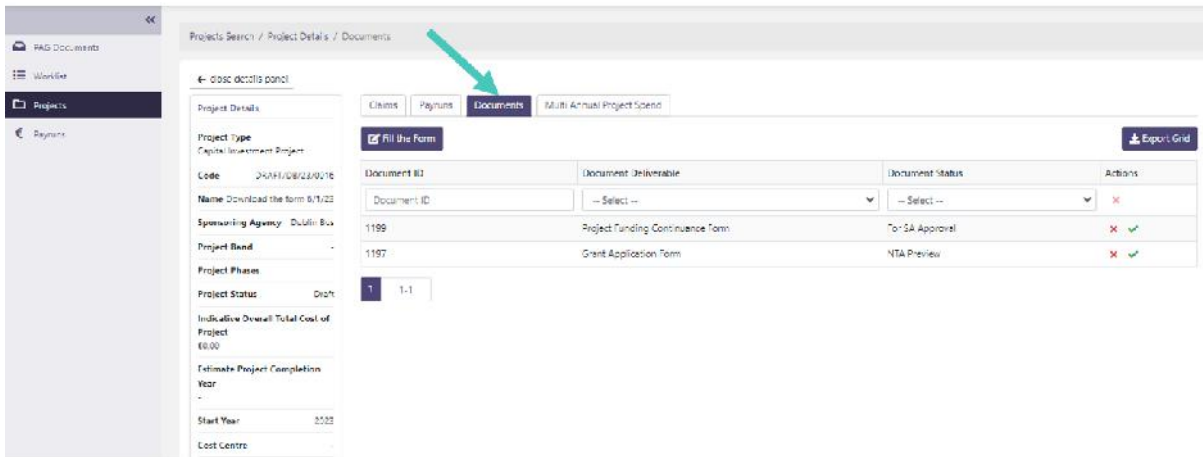

In the dashboard user can choose the **'Documents tab'**.

This will then open the project dashboard which will display all related documents by default, as well as allowing the user to select the **Fill the Form and Export grid** buttons and document grid.
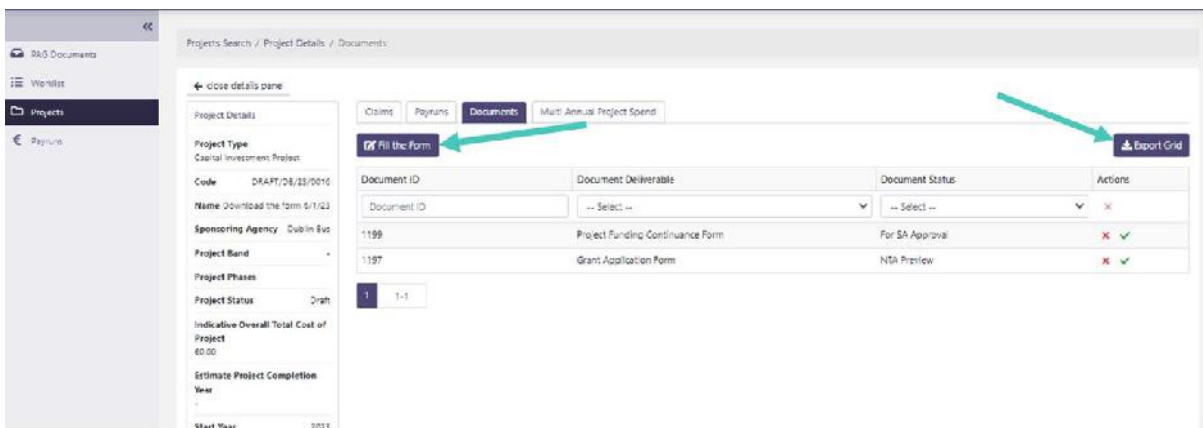
After clicking the **'Export Grid'** button user can export all returned records to excel spreadsheet and download.

After clicking the **'Fill the Form'** button a pop-up will be displayed to the user, allowing the user to select and fill any of the following form from the dropdown:

- Grant Applicatin Form

- Project Funding ContinuanceForm

- Allocation Adjustment Form
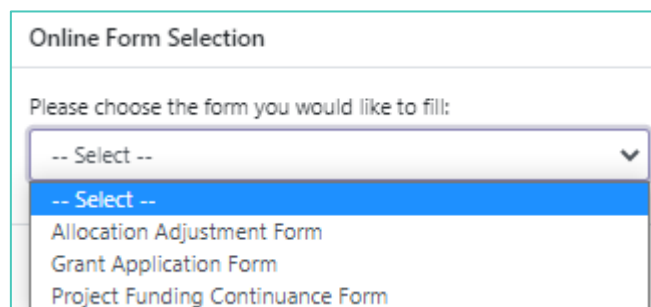
User can view the following searchable columns in the Document grid:

- Document ID
- Project Phase
- Document Deliverable
- Document Status
    - Approved
    - Cancelled
    - Draft
    - Not Approved by NTA
    - NTA Preview
    - For NTA Approval
    - For SA Approval
    - Approval in Progress
- Action Icons
    - Cancel
    - Approve

When a user clicks on a record in the grid, the record's details are expanded. Once expanded, the user can see the following details.

- Submitted by
- Submission Date
- Related files(s)
- Number of Comments not Resolved
- Approval Details
- Edit Action Icon – User can able to edit the document which is in **'Draft or NTA Preview'** status.
- History Action Icon

DOCUMENT EDIT

Document Edit will be available for the **Sponsoring Agency Administrator, Project or Programme Manager and Director or Equivalent** to edit. Only records in the following statuses will be available for editing:

- Draft
- NTA Preview

To do this the user performs a search and expands the details of the document they wish to edit. Once expanded the user can select the '**Edit**' icon on the right side of the details window.

After clicking on the Edit Action Icon, the screen will show the form fields,Uploaded documents grid (if any files have already been uploaded) and Section comments.

UPLOADED DOCUMENTS GRID

User can see a list with already uploaded documents on the grid with following fields:

- File ID
- File Name
- Uploaded By
- Upload Date
- Actions
    - o Download action icon - allows to download the attachment
    - o Remove action icon - allows to remove the attachment

SECTION COMMENTS

User can provide comments with following field:

- Comment – Text field restricted to 5000 characters

- Save comment for this Section button

To add a comment to the section the user simply enters the comment in 'Comment' field and click on the 'Save comment for this Section' button.

After clicking on the 'Save comment for this Section' button a new entry added to the grid with following fields.

- Comment Number

- Comment

- Created By

- Created Date

- Actions

User can resolve the comment by clicking on the Resolve action icon.

After Clicking on Resolve action Icon, user will see a pop-up with 'Resolution Comment' text field. Once enter the resolution comment and click on 'Resolve' button, resolution comment added to the comment grid with following fields.

- Created Date
- Resolved By
- Resolution Date
- Resolution Comment

Section Comments

Comment

[text area]

[□ Save Comment for this Section]

Comment Number	Comment	Created By	Actions
2	Section Comment 1	▒▒▒▒▒	☑
1	Section Comment	▒▒▒▒▒	

Created Date
06/01/2023 19:12

Resolved By
▒▒▒▒▒

Resolution Date
06/01/2023 19:15

Resolution Comment
Resolved Section Comment

DOCUMENT APPROVAL

To approve the document, user clicks on **Approve action icon**. On clicking **Approve action icon**, the pop-up will appear on the screen with a message based on the document status and following two buttons:

- No – User can cancel the operation

- Yes – User can approve the document

| Claims | Payruns | **Documents** | Multi Annual Project Spend |

[🗹 Fill the Form]   [⬇ Export Grid]

Document ID	Document Deliverable	Document Status	Actions
Document ID	-- Select -- ⌄	-- Select -- ⌄	✕
1204	Allocation Adjustment Form	Draft	✕ ✓
1198	Allocation Adjustment Form	For SA Approval	✕ ✓
1196	Project Funding Continuance Form	NTA Preview	✕ ✓

To approve the document, which is in 'Draft' status, user clicks on 'Yes' button in the pop-up screen. On clicking 'Yes' button, the status will change to 'NTA Preview'.

Approve Document

Are you sure you wish to approve this document for NTA Preview?

Note: If you click on `Yes` button document will be submitted for NTA Preview. You won't be able to reverse this operation.

Show the Terms & Conditions content

✕ No   ✔ Yes

To approve the document, which is in 'NTA Preview' status, user clicks on 'Yes' button in the pop-up screen. On clicking 'Yes' button, the status will change to 'For SA Approval'.

Approve Document

Are you sure you wish to approve this document for agency director or equivalent approval?

Note: If you click on `Yes` button document will be submitted for SA approval. You won't be able to reverse this operation.

Show the Terms & Conditions content

✕ No   ✔ Yes

To approve the document, which is in 'For SA Approval' status, user must be in designated 'Director or Equivalent' role. After clicking the Approve icon, a pop-up will appear; on that pop-up, the user clicks the 'Provide your Signature' button and provides signs. After signing, clicks the 'Yes' button in the pop-up window. The status will change to 'For NTA Approval' after you click the 'Yes' button.

[Note: While approving the document do an extra validation to check if there are unresolved comments on the document. If there are unresolved comments must resolve those comments]

DOCUMENT CANCELLATION

Any document in the form submission External user (**Sponsoring Agency Administrator, Project or Programme Manager, Director or Equivalent)** with relevant permissions can cancel the Document.

To cancel a document the user simply selects the **Cancel icon** under the **actions** section for the record.

On clicking **Cancel action icon**, the pop-up will appear on the screen with a message and following two buttons:

- No – User can cancel the operation
- Yes – User can confirm the document cancellation
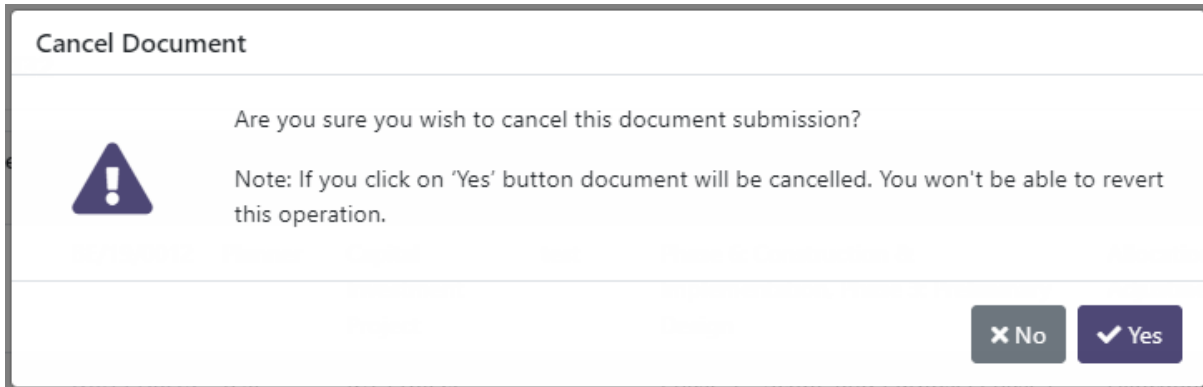
Once the "Yes" button is clicked, the document status will change based on the previous status.

DOCUMENT HISTORY

All actions taken on a document are recorded in an audit history. To view this the user needs to expand the details of the document by selecting the line item & clicking the **history icon** under **actions**.

Clicking the history icon will present the user with a pop-up covering all changes to the document.

Document History

Change Type	Change Date	Created By	Actions
-- Select -- ⌄	📅	Created By	✕
Document Updated	23/11/2022 12:40:55		🔍
Document Cancelled	08/11/2022 07:02:35		🔍
Document Created	07/11/2022 14:32:20		🔍

✕ Close

Clicking on the '**Magnifying Glass'** icon will present another pop-up detailing what changes were made in greater detail.

History Details

Change Type	Change Date
Document Updated	15/12/2022 10:07:53

Created By

Details

BEFORE CHANGE	AFTER CHANGE
Status	Status
NTA Preview	**For SA Approval**
Section 6 description	Section 6 description
-	**test**
Project contact person	Project contact person
-	**Maggie: FinancialApprovals, 3567898764, maggie567@demo.com, Admin, ;**

✕ Close

14. MANAGE EXTERNAL USERS ASSIGNMENT

MANAGE USERS

To manage users as Sponsoring Agency Administrator the user can navigate to the administration section via the dashboard of the left navigation pane.
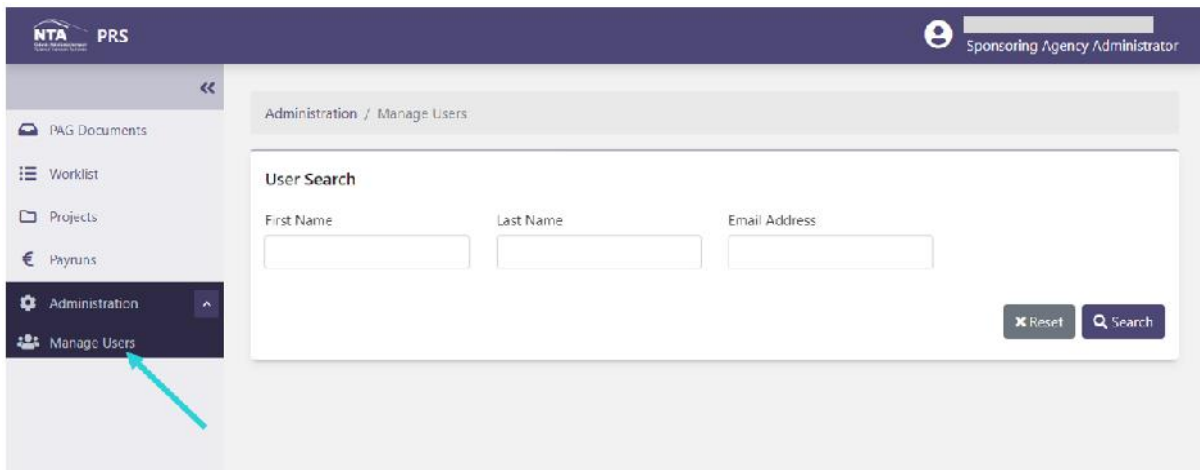
After the user clicks into the administration section, they are presented with a search screen. The following criteria can be used for a full or partial search:

- First Name
- Last Name
- Email Address

Once the desired search criteria are set the user has 2 options:

- Reset – Clear all search fields.
- Search – Display Results.
- Export Grid – Exports all results to an excel file.

If all search fields are blank and the user performs a search the results will display all data available to the user.
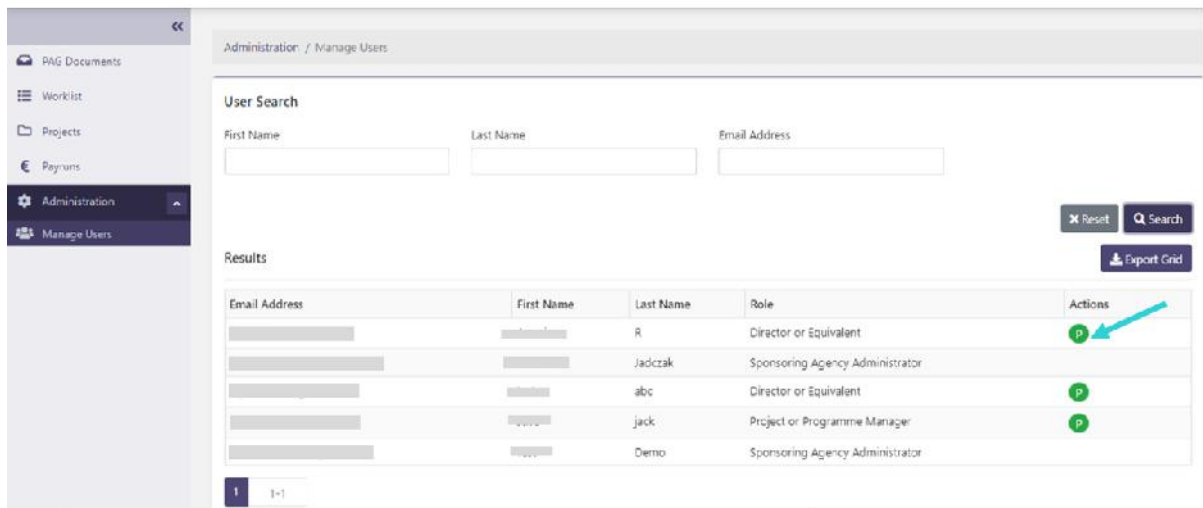
The grid will give an overview of all relevant details for the users with following details:

- Email Address
- First Name
- Last Name
- Role
- Actions
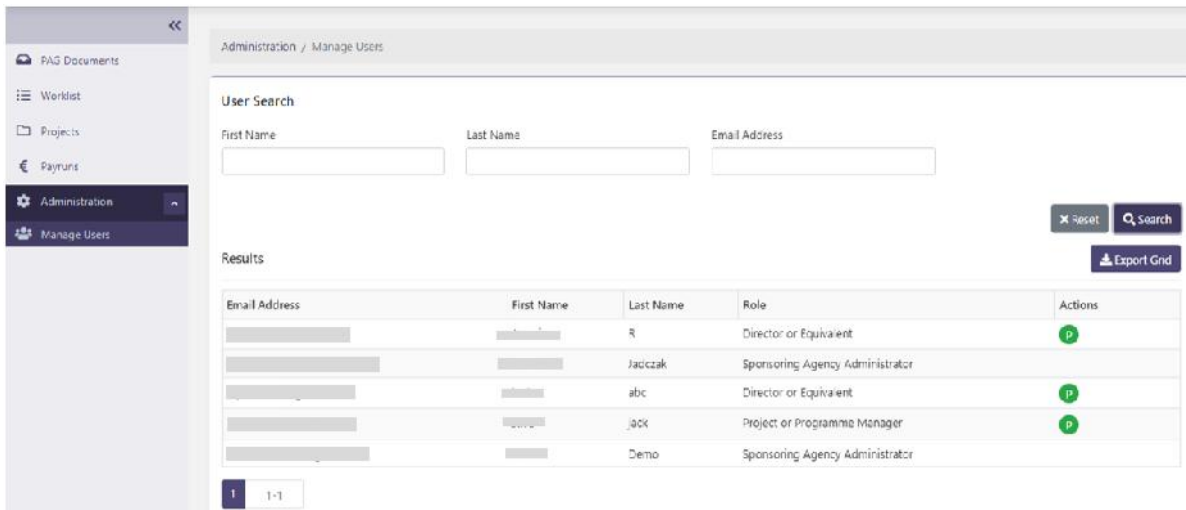
MANAGE USER PROJECTS

To view and manage a user's assigned projects, the user selects the **Assigned Projects** icon under **actions.**

This will open a screen allowing the Sponsoring Agency Admin to manage **User Projects, Assign New Project(s), Project Management Re-Assignment, Projects.**

The following fields will be displayed in the **'User Details'** section grid:

- First Name

- Last Name

- Email Address

- Role

- **Assign New Project(s)**

The dropdown will contain a list of all projects the user is not already assigned to. This can be used to give the user access to projects.

To assign a project:

1. Select 1 or more projects from the list of available projects
2. Select **Assign New Project(s)**

[Note: If user select project and decide to assign, user will have access to selected projects but will not be assigned in their Project Management section]

- **Project Management Re-Assignment**

The user can assign projects to other users. However, they can only reassign a user of the same role. For example, if the user being modified is a programme manager, programme manager can only assign the project to another programme manager user.

To reassign a project to another user:

1. Select a project or projects using the **Select for Re-Assignment** tick box
2. Search for another user using the **Re-Assign to other User** search field
3. Select **Re-Assign** button

- The following fields will be displayed in the 'Projects' section grid:
    - Project Code & Name
    - Programme
    - Sub-Programme
    - Project Management
    - Remove Access
    - Select for Re-Assignment