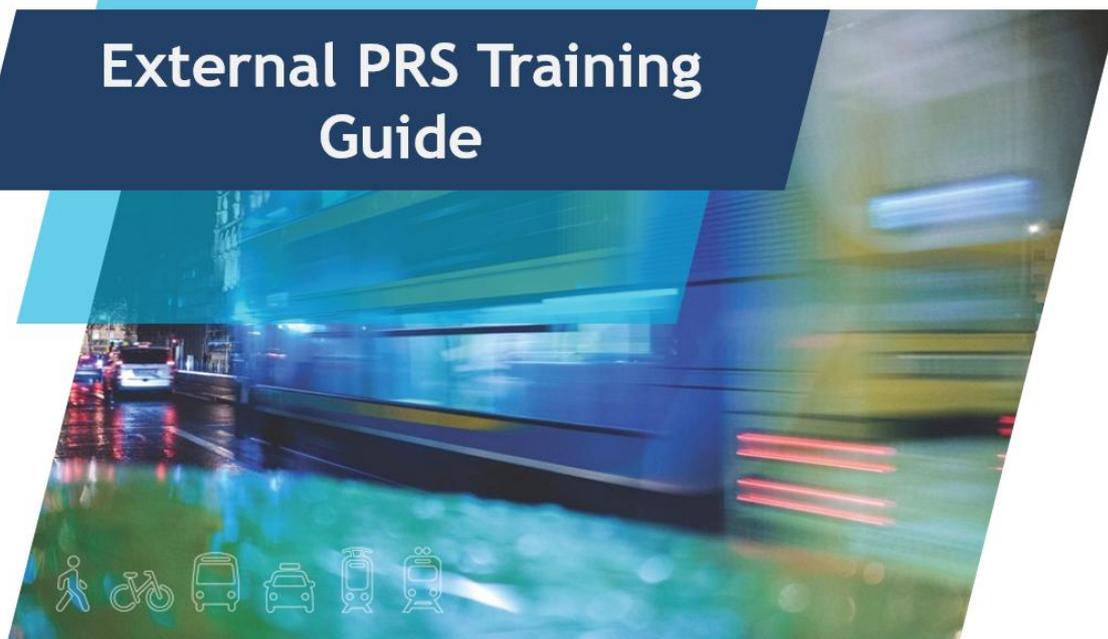


Product Version: © 2023 – PRS – 3.5.0.0



External PRS Training Guide



Version 2.1

Prepared by

Michael Connolly



REVISION & SIGNOFF SHEET

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
1.3	Michael Connolly	04/04/2023	Updated comments from Roy in Navigation section
1.4	Michael Connolly	21/11/2023	Updated to reflect changes made in PRS Phase 2 Stage 1 Enhancements
1.5	Vishvas Sharma	20/05/2024	Track Changes accepted and Resolved all the accepted comments
1.6	Michael Connolly	28/06/2024	Initial update to phase 2 stage 2 project changes
1.7	Michael Connolly	02/07/2024	Updated based off feedback
1.8	Michael Connolly	11/06/2025	Adjusted for PRS Enhancements CR project

Version	Author	Date	Description of Change
1.9	Michael Connolly	17/09/2025	Adjusted for minor PRS changes from BC Integration
2.0	Michael Connolly	05/02/2026	Adjusted for CR2 PRS changes.
2.1	Michael Connolly	24/02/2026	Adjusted to accommodate feedback

APPROVERS LIST

Name	Role	Approver/Reviewer	Approval/Review Date
Vishvas Sharma	Senior Project Manager	Reviewer	12/02/2026

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1. INTRODUCTION

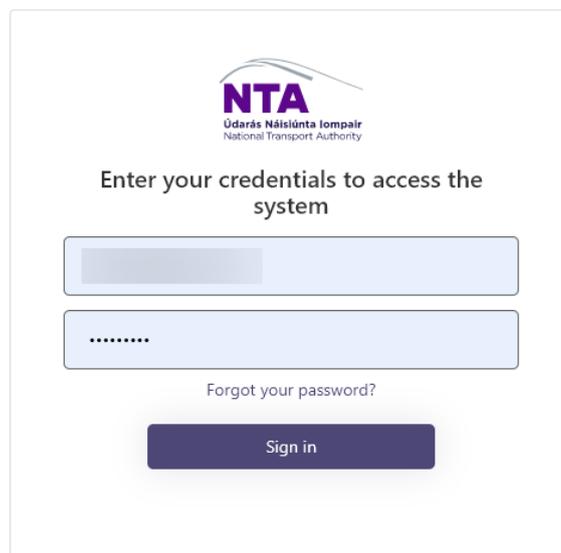
PRS (Project Reporting System) is designed to facilitate the submission, processing and monitoring of expenditure claims for projects funded by the National Transport Authority. It also allows to submit online Grant Application Form, Project Continuance Form and Allocation Adjustment Form and maintain approval workflow with secure online eSignature.

2. LOGIN

To log in the user must navigate to the home page URL

<https://prs.nationaltransport.ie> . Here they will be prompted to sign in via Username & Password.

Welcome to the PRS – NTA Capital Grant Management System



NTA
Údarás Náisiúnta Iompair
National Transport Authority

Enter your credentials to access the system

.....

Forgot your password?

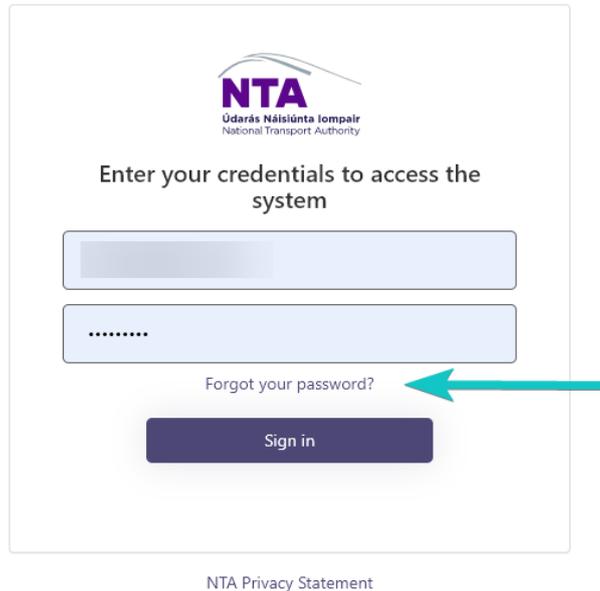
Sign in

[NTA Privacy Statement](#)

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.

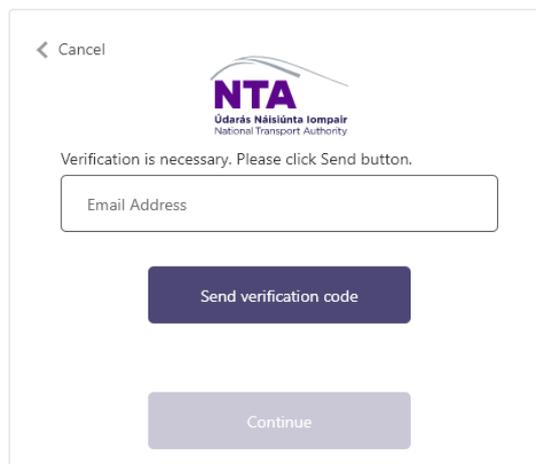
Welcome to the PRS – NTA Capital Grant Management System



The screenshot shows the login interface for the PRS – NTA Capital Grant Management System. At the top is the NTA logo (Udarás Náisiúnta Iompair / National Transport Authority). Below the logo, the text reads "Enter your credentials to access the system". There are two input fields: the first is for the username and the second is for the password, with the password field masked with dots. Below the password field is a link that says "Forgot your password?". A red arrow points to this link. At the bottom of the form is a "Sign in" button. Below the form, there is a link for "NTA Privacy Statement".

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.

Welcome to the PRS – NTA Capital Grant Management System



The screenshot shows the password reset screen. At the top left is a "Cancel" button. In the center is the NTA logo. Below the logo, the text reads "Verification is necessary. Please click Send button." There is an input field labeled "Email Address". Below the input field are two buttons: "Send verification code" and "Continue".

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.

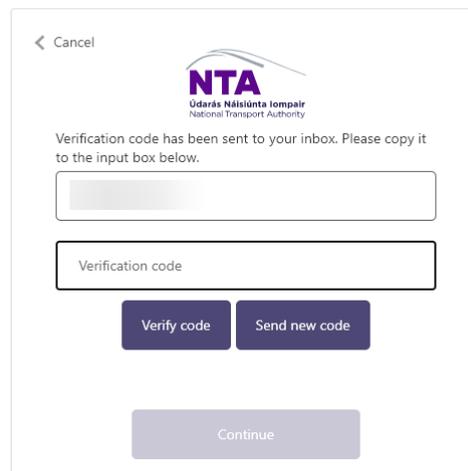
Verify your email address

Thanks for verifying your [redacted].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

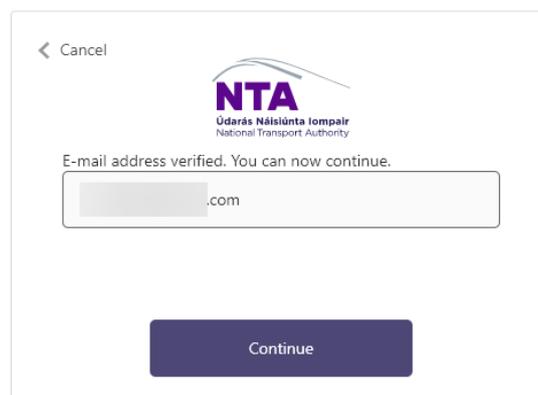


The screenshot shows a mobile-style interface with a back arrow and 'Cancel' text at the top left. The NTA logo (Údarás Náisiúnta Iompair) is centered. Below the logo, it says 'Verification code has been sent to your inbox. Please copy it to the input box below.' There is a large empty input box, followed by a smaller input box labeled 'Verification code'. Below this are two buttons: 'Verify code' and 'Send new code'. At the bottom is a 'Continue' button.

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



The screenshot shows a mobile-style interface with a back arrow and 'Cancel' text at the top left. The NTA logo (Údarás Náisiúnta Iompair) is centered. Below the logo, it says 'E-mail address verified. You can now continue.' There is a large input box containing a redacted email address followed by '.com'. At the bottom is a 'Continue' button.

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: % [& " , : + = V () < >] 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

SYSTEM USERS

The external PRS system is accessed by 6 types of user roles: Claim Proposers, Finance Officers, Project or Programme Managers, Director or Equivalent, Sponsoring Agency Administrators and Sponsoring Agency Read Only

CLAIM PROPOSER

This user role is responsible for:

- Creating claims on specific projects and submitting them for Finance Officer/ Director or Equivalent to review

FINANCE OFFICER

This user role is responsible for:

- Approving Claims to be processed by NTA
- Rejecting Claims back to Claim Proposer or SA Project or Programme Managers of the project for revision

SPONSORING AGENCY ADMINISTRATOR

This user role is allowed to:

- Create claims on specific projects and submit them for Finance Officer or Director or Equivalent to review

- Create/initiate online Forms/Pag deliverables 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, Finance Officers and Read Only users have access to all projects by default

PROJECT OR PROGRAMME MANAGER

This user role is responsible for:

- Create/initiate online Forms/Pag deliverables, Grant Application Form/Project Funding Continuance Form/Allocation Adjustment Form
- Editing documents and providing comments on them
- Cancelling/sending back to previous state.
- Approving documents if they are in Draft or NTA Preview status

DIRECTOR OR EQUIVALENT

This user role is responsible for:

- Create/initiate online Forms/Pag deliverables, Grant Application Form/Project Funding Continuance Form/Allocation Adjustment Form
- Editing documents and providing comments on them
- Cancelling/sending back to previous state, 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'
- Docusign approver of online forms and PAGs if signature required.
- Approving Claims to be processed by NTA
- Rejecting Claims back to Sponsoring Agency Administrator, Project or Programme Manager or Finance Officer.

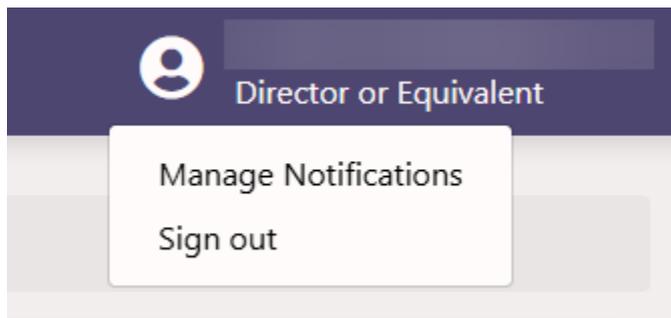
SPONSORING AGENCY READ ONLY

The sponsoring agency read only role allows users to access the system to view all data. These users do not have any ability to modify any existing data.

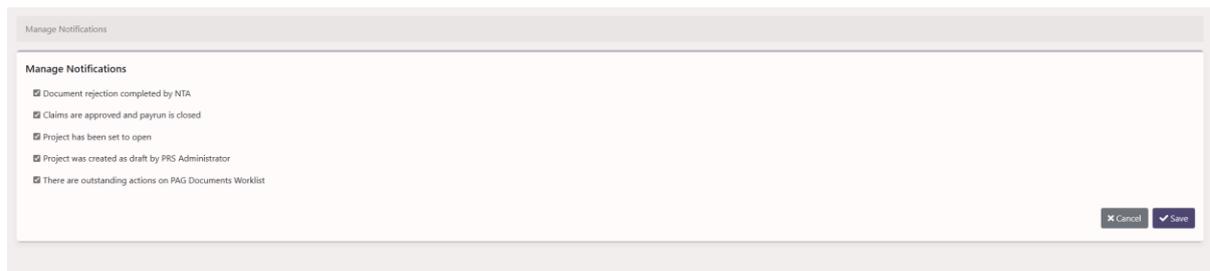
3. AUTOMATED EMAILS

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 OR PROJECT OR PROGRAMME MANAGER (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 with subject "Your Claim was rejected" 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 Manager or NTA Programme Manager

Who receives this email?

This email with subject “Your Claim was rejected” is sent to last approver of the claim (Finance Officers or Director or Equivalent) and Sponsoring Agency Administrator by default 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.

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 with subject “Updated Allocation Activated on PRS” will be sent to the Sponsoring Agency Claim Proposers, Financial Officer and Sponsoring Agency Administrator, NTA Programme Manager and NTA Senior Programme Manager of the project.

PROJECT CREATED MANUALLY BY NTA (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 with subject “New Project Activated on PRS” 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 has closed a payrun.

Who receives this email?

The email with subject “Your Claim is now Approved” is sent to the Sponsoring Agency Financial Officers and Claim Proposers and 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 Completely or Document has been returned for further adjustments.

Who receives this email?

The email with subject “Your document was rejected” is sent 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?

The email with subject “New Draft Project Created on PRS” is sent to Sponsoring Agency Administrators, NTA Programme Manager, NTA Senior Programme Manager.

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?

The email with subject “New Project Activated on PRS” is sent to Project or Programme Managers, Director or Equivalent, Sponsoring Agency Administrator, NTA Programme Manager, NTA Senior Programme Manager.

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?

The email with subject “New Project Activated on PRS” is sent to Individuals who have outstanding actions on PAG document worklist on PRS (Project or Programme Manager, Director or Equivalent).

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

HOLD POINT WAS NOT RELEASED (NOT MANAGEABLE NOTIFICATION)

When is this email sent?

The email is sent when a hold point on a project document deliverable is set to “Not Released”.

Who receives this email?

The email with subject “Your hold point deliverable was not released” is sent to the project SA Project or Programme Manager and NTA Programme Manager and NTA Senior Programme Manager.

NTA REVIEW COMPLETED FORM CAN BE SUBMITTED FOR APPROVAL (NOT MANAGEABLE NOTIFICATION)

When is this email sent?

The email is sent by internal users when a document is in “NTA Preview” status. If the document reviewer determines no further action is needed or if action is required, the relevant email will be sent to the document uploader.

Who receives this email?

The email with subject “Your document has been reviewed” is sent to the uploader of the document deliverable being reviewed.

GATEWAY APPROVED (NOT MANAGEABLE NOTIFICATION)

When is this email sent?

The email is sent automatically when a submitted Gateway Approval form has been Approved.

Who receives this email?

The email with subject “Gateway Approved” is sent to the project SA Project or Programme Manager, NTA Programme Manager and NTA Senior Programme Manager.

4. DASHBOARD

On login, the user will be brought to the Dashboard screen by default. With PAG Summary and Hold Point Summary sections

The screenshot shows a dashboard with a sidebar on the left containing navigation items: Dashboard, PAG Documents, Worklist, Projects, Payruns, and Administration. The main content area is titled 'PAGs Summary' and features a filter section with dropdown menus for Project Code, Project Name, Project Type, Project Band, Deliverable Phase, Programme, Sub-Programme, and Classification. Below the filters is an 'Export Grid' button and a 'Reset' button. A data table follows, listing project details and completion percentages.

Project Code	Project Name	Project Type	Project Band	Programme	Sub-Programme	Classification	% Completed
DRAFT/TAISC/24/0007	test	Capital Investment Project	Band 1	B8.1 SUSTAINABLE URBAN TRANSPORT	GDA	Bus Network Improvements	5.26%
DRAFT/TAISC/24/0012	GAF PAL Test	Capital Investment Project	Band 1	B8.1 SUSTAINABLE URBAN TRANSPORT	GDA	Bus Network Improvements	0%
DRAFT/TAISC/24/0017	Rosie Test 2	Capital Investment Project	Band 1	B8.5 WALKING & CYCLING PROGRAMME	Regional Cities	Cycling and Walking	0%
DRAFT/TAISC/24/0038	GAF Project type change test 1	ICT Project	Band 2	B8.1 SUSTAINABLE URBAN TRANSPORT	GDA	Bus Network Improvements	0%
TAISC/24/0010	Tes Thresh	Capital Investment Project	Band 1	B8.1 SUSTAINABLE URBAN TRANSPORT	GDA	Bus Network Improvements	12.5%
TAISC/24/0011	Rosie Test	Capital Investment Project	Band 3 (Eur 20-29.9 Mn)	B8.5 WALKING & CYCLING PROGRAMME	GDA	Cycling and Walking	27.27%

PAGS SUMMARY

On the Dashboard, the user will have access to the new PAG Summary section. In this grid, the user can see a quick breakdown of the Deliverables expected for each project.

The following filters are available:

- Project Code
- Project Name
- Project Type
- Project Band
- Deliverable Phase
- Programme
- Sub-Programme
- Classification

This screenshot is identical to the one above, but a red rectangular box highlights the filter section at the top of the dashboard, including the dropdown menus for Project Code, Project Name, Project Type, Project Band, Deliverable Phase, Programme, Sub-Programme, and Classification.

On clicking on a record, some useful information can also be retrieved such as:

- The number of deliverables in a particular status as shown below

PAGs Summary

Project Code: Project Name: Project Type: -- Select -- Project Band: -- Select --

Deliverable Phase: -- Select -- Programme: -- Select -- Sub-Programme: -- Select -- Classification: -- Select --

[Export Grid](#) [Reset](#) [Search](#)

Project Code	Project Name	Project Type	Project Band	Programme	Sub-Programme	Classification	% Completed
TAISC/24/0043	Test Gateway project	Capital Investment Project	Band 1	B8.1 SUSTAINABLE URBAN TRANSPORT	GDA	Bus Network Improvements	71.43%

Deliverable Phase	Draft	NTA Preview	Review Complete	For NTA Approval	Gatekeeper Review	Approval in Progress	Approved	% Completed
Phase 1 - Scope and Purpose	0	0	6	0	0	0	0	100%
Phase 2 - Concept Development & Option Selection	0	0	5	0	0	0	0	100%
Phase 3 - Preliminary Design	0	0	6	0	0	0	0	100%
Phase 4 - Statutory Process	0	0	6	0	0	0	0	100%
Phase 5 - Detailed Design & Procurement	0	0	1	1	0	0	0	33.33%
Phase 6 - Construction & Implementation	0	0	0	0	0	0	0	0%
Phase 7 - Close-out & Review	0	0	0	0	0	0	0	0%

- A completion percentage of expected deliverables per deliverable phase.

PAGs Summary

Project Code: Project Name: Project Type: -- Select -- Project Band: -- Select --

Deliverable Phase: -- Select -- Programme: -- Select -- Sub-Programme: -- Select -- Classification: -- Select --

[Export Grid](#) [Reset](#) [Search](#)

Project Code	Project Name	Project Type	Project Band	Programme	Sub-Programme	Classification	% Completed
TAISC/24/0043	Test Gateway project	Capital Investment Project	Band 1	B8.1 SUSTAINABLE URBAN TRANSPORT	GDA	Bus Network Improvements	71.43%

Deliverable Phase	Draft	NTA Preview	Review Complete	For NTA Approval	Gatekeeper Review	Approval in Progress	Approved	% Completed
Phase 1 - Scope and Purpose	0	0	6	0	0	0	0	100%
Phase 2 - Concept Development & Option Selection	0	0	5	0	0	0	0	100%
Phase 3 - Preliminary Design	0	0	6	0	0	0	0	100%
Phase 4 - Statutory Process	0	0	6	0	0	0	0	100%
Phase 5 - Detailed Design & Procurement	0	0	1	1	0	0	0	33.33%
Phase 6 - Construction & Implementation	0	0	0	0	0	0	0	0%
Phase 7 - Close-out & Review	0	0	0	0	0	0	0	0%

A completion percentage is also available for the entire project as below.

PAGs Summary

Project Code:
 Project Name:
 Project Type: -- Select --
 Project Band: -- Select --
 Deliverable Phase: -- Select --
 Programme: -- Select --
 Sub-Programme: -- Select --
 Classification: -- Select --

Export Grid Reset Search

Project Code	Project Name	Project Type	Project Band	Programme	Sub-Programme	Classification	% Completed
TAISC/24/0043	Test Gateway project	Capital Investment Project	Band 1	B8.1 SUSTAINABLE URBAN TRANSPORT	GDA	Bus Network Improvements	71.43%

Deliverable Phase	Draft	NTA Preview	Review Complete	For NTA Approval	Gatekeeper Review	Approval in Progress	Approved	% Completed
Phase 1 - Scope and Purpose	0	0	6	0	0	0	0	100%
Phase 2 - Concept Development & Option Selection	0	0	5	0	0	0	0	100%
Phase 3 - Preliminary Design	0	0	6	0	0	0	0	100%
Phase 4 - Statutory Process	0	0	6	0	0	0	0	100%
Phase 5 - Detailed Design & Procurement	0	0	1	1	0	0	0	33.33%
Phase 6 - Construction & Implementation	0	0	0	0	0	0	0	0%
Phase 7 - Close-out & Review	0	0	0	0	0	0	0	0%

HOLD POINTS SUMMARY

Scrolling down below the PAG Summary grid is the Hold Point Summary. This section will display a breakdown of projects with Hold point deliverables with a count of how many hold points have not been actioned, how many hold points have been released and how many have not been released.

The below filters are available to the user:

- Project Code
- Project Name
- Project Type
- Project Band
- Deliverable Phase

Hold Points Summary

Project Code:
 Project Name:
 Project Type: -- Select --
 Project Band: -- Select --
 Deliverable Phase: -- Select --

Export Grid Reset Search

Project Code	Project Name	Project Type	Project Band	Deliverable Phase	Not Actioned	Not Released	Released
TAISC/24/0016	Micks Hold Point Project	Capital Investment Project	Band 1	Phase 1 - Scope and Purpose	2	0	0
TAISC/24/0018	Rosie Test Schema 3	Capital Investment Project	Band 2	Phase 3 - Preliminary Design	0	0	1
TAISC/24/0019	Micks Gatekeeper Quick	Capital Investment Project	Band 2	Phase 1 - Scope and Purpose	0	0	1
TAISC/24/0020	Micks Gatekeeper Quick 2	Capital Investment Project	Band 2	Phase 1 - Scope and Purpose, Phase 2 - Concept Development & Option Selection	0	0	2
TAISC/24/0042	Test Project	Capital Investment Project	Band 1	Phase 1 - Scope and Purpose	0	0	1
TAISC/24/0043	Test Gateway project	Capital Investment Project	Band 1	Phase 1 - Scope and Purpose, Phase 3 - Preliminary Design, Phase 4 - Statutory Process, Phase 5 - Detailed Design & Procurement	1	0	3
TAISC/24/0044	Rosie Test 1 June	ICT Project	Band 2	Phase 1 - Initiation	1	0	0

The below information is available in the results grid:

- Sponsoring Agency
- Project Code
- Project Name
- Project Type
- Deliverable Phase
- Not Actioned - number of hold points which have not been actioned
- Not Released - number of hold points that were not released
- Released - number of hold points that were released

When I click on a number, it will redirect me to the PAG Documents and the search results will be prefiltered based on the chosen project.

Hold Points Summary

Project Code Project Name Project Type Project Band

Deliverable Phase

[Export Grid](#) [Reset](#) [Search](#)

Project Code	Project Name	Project Type	Project Band	Deliverable Phase	Not Actioned	Not Released	Released
TAISC/24/0016	Micks Hold Point Project	Capital Investment Project	Band 1	Phase 1 - Scope and Purpose	2	0	0
TAISC/24/0018	Rosie Test Schema 3	Capital Investment Project	Band 2	Phase 3 - Preliminary Design	0	0	1
TAISC/24/0019	Micks Gatekeeper Quick	Capital Investment Project	Band 2	Phase 1 - Scope and Purpose	0	0	1
TAISC/24/0020	Micks Gatekeeper Quick 2	Capital Investment Project	Band 2	Phase 1 - Scope and Purpose, Phase 2 - Concept Development & Option Selection	0	0	2
TAISC/24/0042	Test Project	Capital Investment Project	Band 1	Phase 1 - Scope and Purpose	0	0	1
TAISC/24/0043	Test Gateway project	Capital Investment Project	Band 1	Phase 1 - Scope and Purpose, Phase 3 - Preliminary Design, Phase 4 - Statutory Process, Phase 5 - Detailed Design & Procurement	1	0	3
TAISC/24/0044	Rosie Test 1 June	ICT Project	Band 2	Phase 1 - Initiation	1	0	0

The hold point summary grid can be exported to an excel spreadsheet via the

[Export Grid](#) button above the grid.

Hold Points Summary

Project Code: Project Name: Project Type: -- Select -- Project Band: -- Select --

Deliverable Phase: -- Select --

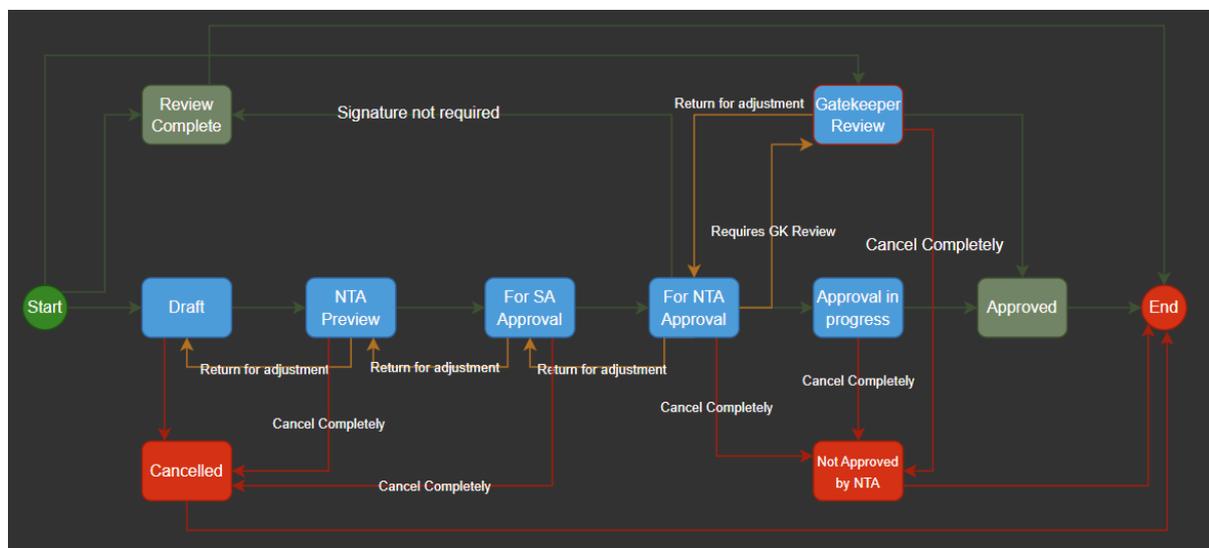
[Export Grid](#) [Reset](#) [Search](#)

Project Code	Project Name	Project Type	Project Band	Deliverable Phase	Not Actioned	Not Released	Released
TAISC/24/0016	Micks Hold Point Project	Capital Investment Project	Band 1	Phase 1 - Scope and Purpose	2	0	0
TAISC/24/0018	Rosie Test Schema 3	Capital Investment Project	Band 2	Phase 3 - Preliminary Design	0	0	1
TAISC/24/0019	Micks Gatekeeper Quick	Capital Investment Project	Band 2	Phase 1 - Scope and Purpose	0	0	1
TAISC/24/0020	Micks Gatekeeper Quick 2	Capital Investment Project	Band 2	Phase 1 - Scope and Purpose, Phase 2 - Concept Development & Option Selection	0	0	2
TAISC/24/0042	Test Project	Capital Investment Project	Band 1	Phase 1 - Scope and Purpose	0	0	1
TAISC/24/0043	Test Gateway project	Capital Investment Project	Band 1	Phase 1 - Scope and Purpose, Phase 3 - Preliminary Design, Phase 4 - Statutory Process, Phase 5 - Detailed Design & Procurement	1	0	3
TAISC/24/0044	Rosie Test 1 June	ICT Project	Band 2	Phase 1 - Initiation	1	0	0

5. PAG DOCUMENTS WORKLIST

User clicks on PAG Documents tab from the left-hand menu.

DOCUMENT STATUS WORKFLOW



- Document follows above flow when initiated by External users.
- Where Document is initiated by NTA, it will go to 'Review Complete'.
- Where Document is initiated by NTA and requires SA signature, it will proceed to 'For SA Approval'
- Where Document is initiated by NTA and Threshold is set, it will proceed to 'Approval In Progress'

- Where Document is initiated by NTA and requires Gatekeeper Review, it will proceed to 'For NTA Approval'

PAG DOCUMENTS SEARCH.

The following search field filters are available to search Documents:

- Document ID
- Project Code
- Project Name
- Project Type
- Project Band
- Deliverable Phase
- Document Type
- Document Deliverable
- Document Status (Note: This will be pre-set based on role but can be changed)
- Hold Point Deliverable
- Submission Date-From
- Submission Date-To
- Action Required
- Return records with comments not resolved
- Return records awaiting my signature (visible for Director or Equivalent user only)

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 with the below columns:

- Document ID
- Project Code
- Project Name
- Project Type
- Project Band
- Deliverable Phase – The project phase the deliverable is expected for delivery.

- Document Deliverable – The name of the document deliverable
- Current Year Allocation Request/Adjustment
 - For Grant Application Forms, the value displayed is the ‘Funding Sought from NTA (€)’
 - For Project Funding Continuance Forms, the value displayed is the ‘Funding requested for current year (€ EUR)’
 - For Allocation Adjustment Forms, the value displayed is the ‘Adjustment Value (€ EUR)’
 - For All other forms it will display as a dash “ – “
- Document Status – The current document status
- Action Required – will display a value if a comment needs to be responded to or a comment has been updated. The following are possible values:
 - Address SA Queries
 - Address NTA Queries
 - SA Queries Addressed
 - NTA Queries Addressed
 - Ready For NTA Approval
 - None (No action required)
- Actions
 - Approve Document
 - Reject Document

The screenshot shows the 'PAG Documents' form in the NTA PRS system. The form is titled 'Documents' and includes the following fields:

- Document ID (text input)
- Project Code (text input)
- Project Name (text input)
- Project Type (dropdown menu, currently showing '-- Select --')
- Project Band (dropdown menu, currently showing '-- Select --')
- Deliverable Phase (dropdown menu, currently showing '-- Select --')
- Document Type (dropdown menu, currently showing '-- Select --')
- Document Deliverable (dropdown menu, currently showing '-- Select --')
- Document Status (dropdown menu, currently showing a preselected value)
- Hold Point Deliverable (dropdown menu, currently showing '-- Select --')
- Submission Date - From (text input with calendar icon)
- Submission Date - To (text input with calendar icon)
- Action Required (dropdown menu, currently showing '-- Select --')

At the bottom of the form, there are two checkboxes:

- Return records with comments not resolved
- Return records awaiting my signature

 There are also 'Reset' and 'Search' buttons at the bottom right.

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'**

The screenshot shows the 'PAG Documents' form for a 'Sponsoring Agency Administrator'. The form includes fields for Document ID, Project Code, Project Name, Project Type, Project Band, Deliverable Phase, Document Type, Document Deliverable, Document Status (pre-set to 'Draft'), Hold Point Deliverable, Submission Date - From, Submission Date - To, and Action Required. There are also checkboxes for 'Return records with comments not resolved' and 'Return records awaiting my signature'. A 'Fill the Form' button is in the top right, and 'Reset' and 'Search' buttons are in the bottom right.

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

The screenshot shows the 'PAG Documents' form for a 'Director or Equivalent'. The form includes fields for Document ID, Project Code, Project Name, Project Type, Project Band, Deliverable Phase, Document Type, Document Deliverable, Document Status (pre-set to 'For SA Approval'), Hold Point Deliverable, Submission Date - From, Submission Date - To, and Action Required. There are also checkboxes for 'Return records with comments not resolved' and 'Return records awaiting my signature'. A 'Fill the Form' button is in the top right, and 'Reset' and 'Search' buttons are in the bottom right.

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

The screenshot shows the 'PAG Documents' form for a 'Project or Programme Manager'. The form includes fields for Document ID, Project Code, Project Name, Project Type, Project Band, Deliverable Phase, Document Type, Document Deliverable, Document Status (pre-set to 'Draft, NTA Preview'), Hold Point Deliverable, Submission Date - From, Submission Date - To, and Action Required. There are also checkboxes for 'Return records with comments not resolved' and 'Return records awaiting my signature'. A 'Fill the Form' button is in the top right, and 'Reset' and 'Search' buttons are in the bottom right.

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
- Document Description
- Number of Comments not Resolved
- Approval Details
- Edit Action Icon
- History Icon

Note: The document details may differ depending on the document deliverable.

Results 26

[Export Grid](#)

Document ID	Project Code	Project Name	Project Type	Project Band	Deliverable Phase	Document Deliverable	Document Status	Action Required	Actions
562	TAISC/24/0055	Rosie Test Aug 8	Capital Investment Project	Band 1	None	Allocation Adjustment Form	NTA Preview	-	

Submitted By
-

Submission Date
-

Related File(s)
[TAISC-24-0055 - ID 562 - Allocation Adjustment Form.pdf](#)

Document Description
-

Number of Comments not Resolved
0

Approval Details

DOCUMENT EDIT

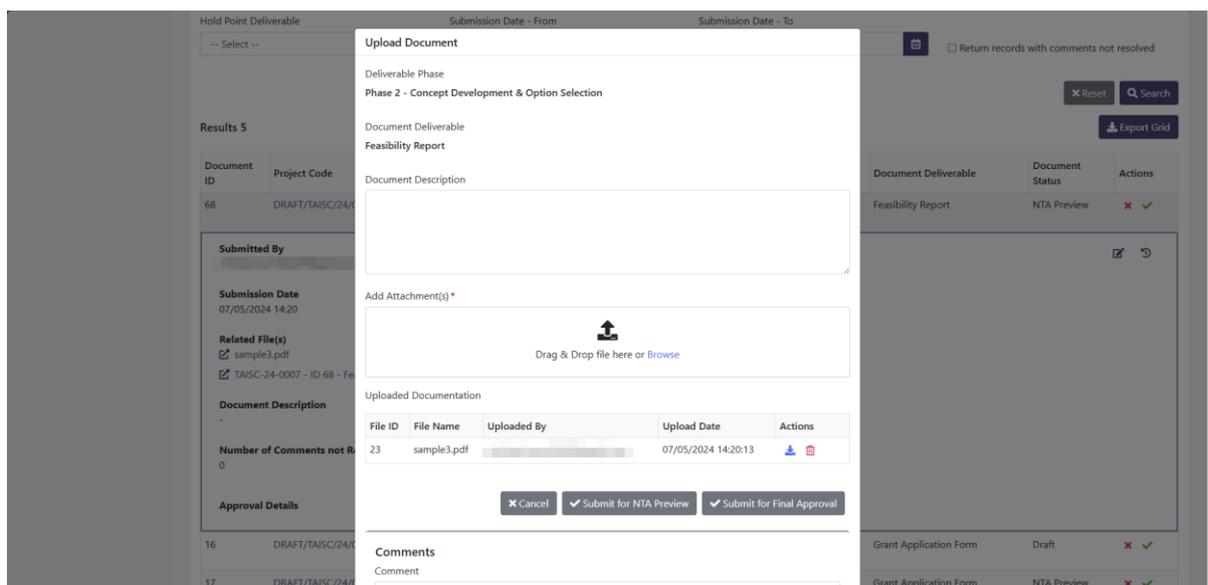
Document and form Edit will be available where the status is Draft or NTA Preview. The document can also be edited in For SA Approval status, but only by users with the Director or Equivalent role where the document has not been signed. Once a document has been signed, it is no longer editable. If the document is signed and a user would like to make further edits, it must be returned for further adjustments via the reject icon.

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

Document ID	Project Code	Project Name	Project Type	Project Band	Deliverable Phase	Document Deliverable	Document Status	Action Required	Actions
562	TAISC/24/0055	Rosie Test Aug 8	Capital Investment Project	Band 1	None	Allocation Adjustment Form	NTA Preview	-	 

Submitted By -	
Submission Date -	
Related File(s) TAISC-24-0055 - ID 562 - Allocation Adjustment Form.pdf	
Document Description -	
Number of Comments not Resolved 0	
Approval Details	

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.



File ID	File Name	Uploaded By	Upload Date	Actions
23	sample3.pdf		07/05/2024 14:20:13	 

During edit process, the below fields are locked from editing and cannot be changed:

- Deliverable Phase

- Document Deliverable

The Document description can be updated and further documents can be added using the Add Attachments area or removed using the trash can icon

Once all necessary changes have been made, the user can click on “Submit for NTA Preview” or “Submit for Final Approval”.

Upload Document

Deliverable Phase
Phase 2 - Concept Development & Option Selection

Document Deliverable
Feasibility Report

Document Description

Add Attachment(s) *


Drag & Drop file here or [Browse](#)

Uploaded Documentation

File ID	File Name	Uploaded By	Upload Date	Actions
23	sample3.pdf	michael.connolly84@gmail.com	07/05/2024 14:20:13	 

✕ Cancel ✓ Submit for NTA Preview ✓ Submit for Final Approval

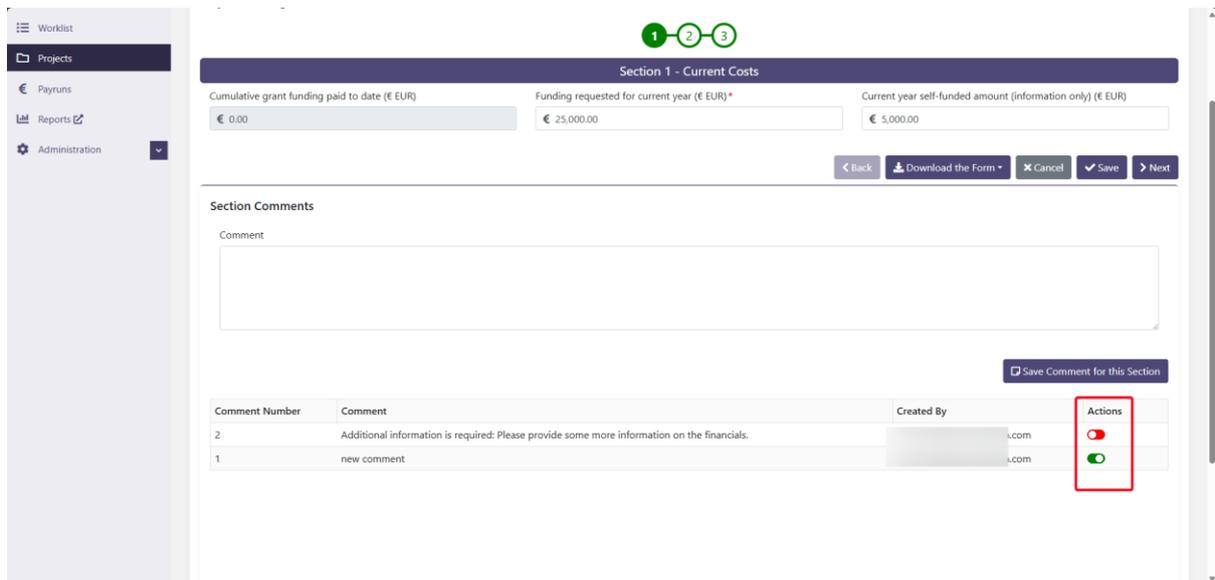
Comments

Comment

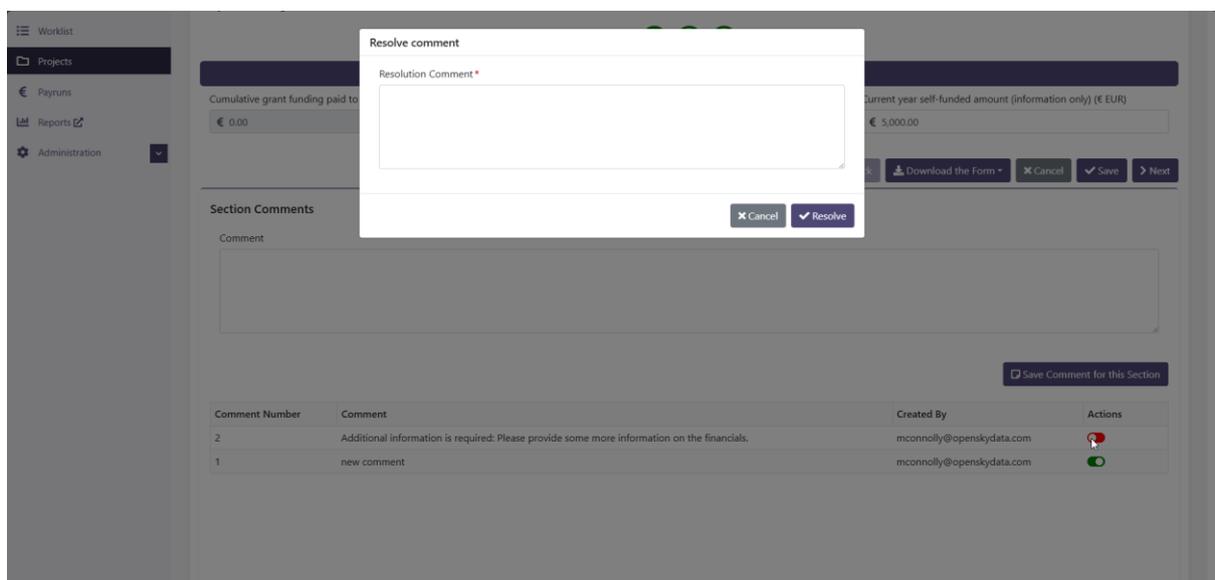
COMMENTS

On Edit documents, users can access comments which may have been left on the documents during the document perhaps being returned for further adjustment during approval.

These comments are unresolved initially which can be seen by the red toggle to represent unresolved comments and the green toggle representing the resolved comments.



After reviewing a comment and wishing to mark the comment as resolved, the user can click on the red toggle to display the Resolve comment pop-up.



Once a resolution has been provided, the comment will update to a green toggle and is then considered resolved. Once resolved, a comment cannot be changed back to unresolved.

If the document has:

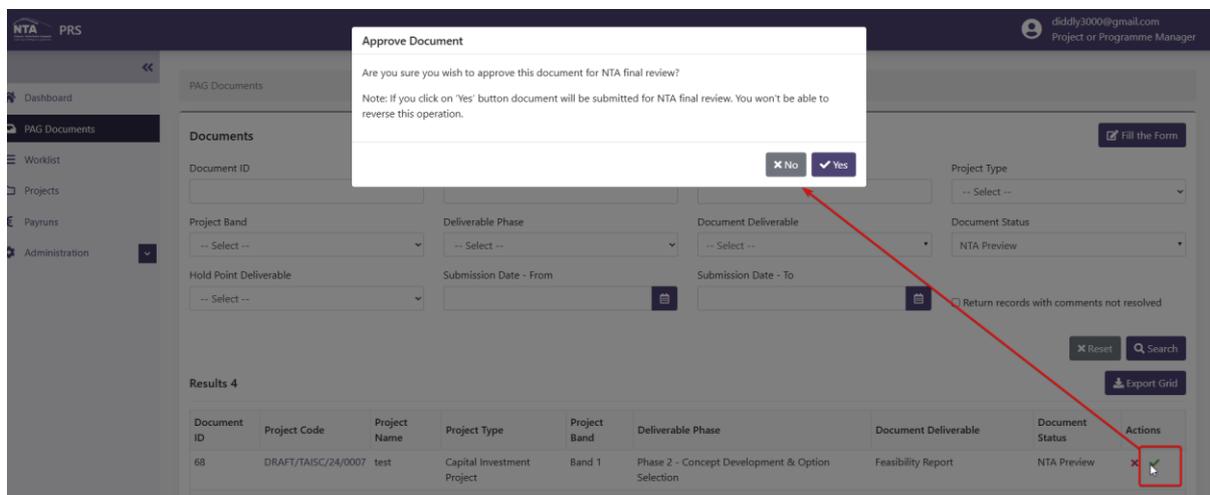
- Action Required = 'Address SA Queries', resolving this comment will update the Action Required to 'SA Queries Addressed'
- Action Required = 'Address NTA Queries' resolving this comment will update the Action Required to 'NTA Queries Addressed'

Once all comments are resolved, the user can proceed with the approval process.

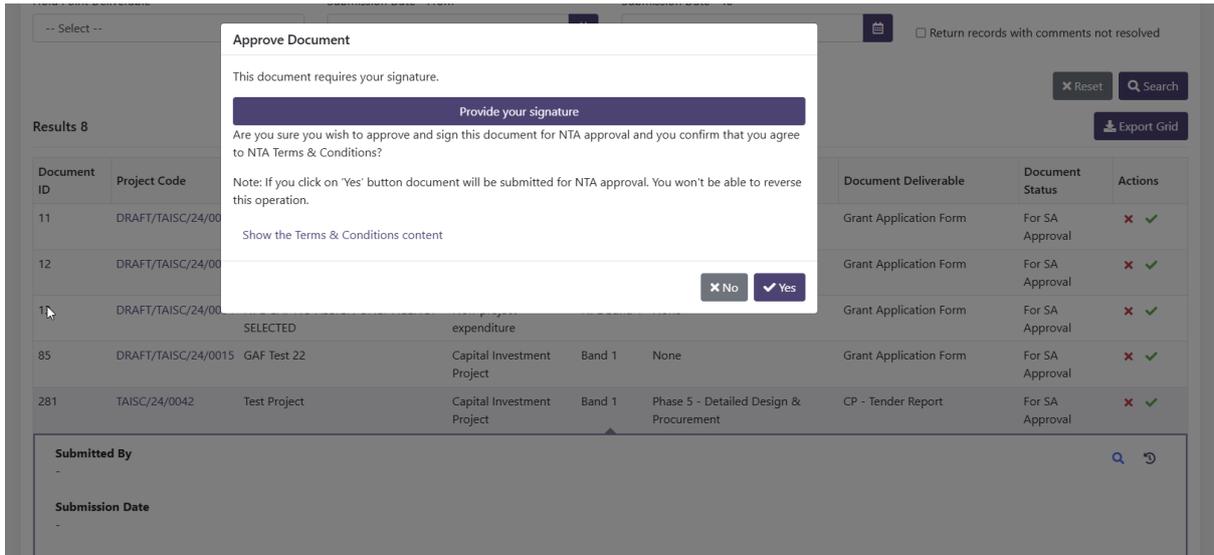
DOCUMENT APPROVAL

On clicking **Approve action icon**, depending on the status of the document the below scenarios may occur:

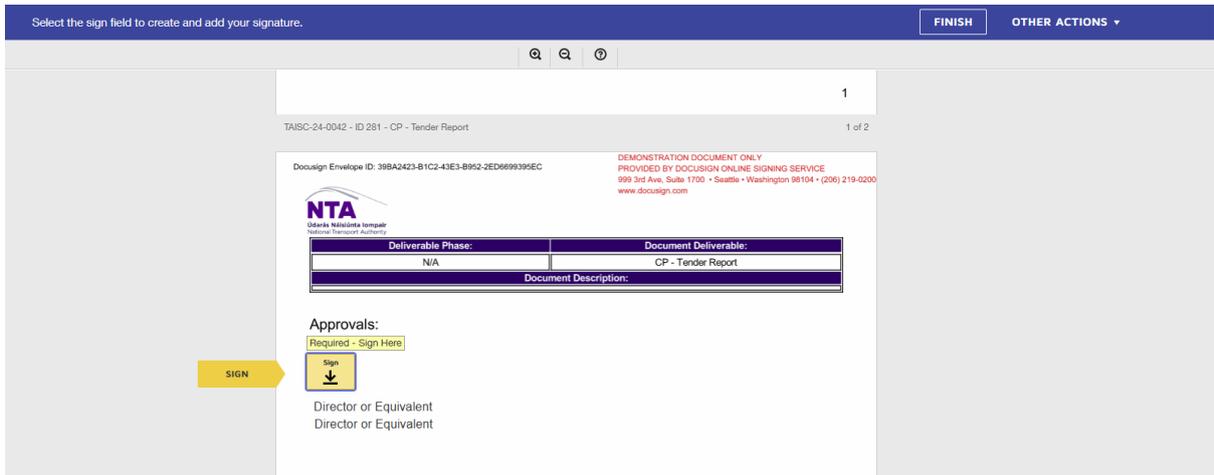
Documents in 'NTA Preview' status can be approved by the project or programme manager, director or equivalent or SA Administrator user and the status will be updated to 'For NTA Approval' where no SA signature is required.



Where a SA signature is required, the document will move from NTA Preview to 'For SA Approval' status to be Approved and signed with a signature by Director or Equivalent user. On clicking Approve the below screen will be displayed.



The user will click “Provide Signature” and will be taken to docusign to review and sign the document



Once signed, the user will be returned to the approval screen where they can approve. After approval, the status will move from “SA Approval” to “For NTA Approval”. Where documents require a signature, this will also generate an “Approved Terms & Conditions” document in the ‘Related File(s)’ section.

722 DRAFT/TAISC/25/0066 T&C DL ALL Capital Investment Project Band 1 None Grant Application Form

Submitted By
kn1ghtcrawler84@gmail.com

Submission Date
16/12/2025 11:32

Document Description
-

Number of Comments not Resolved
0

Related File(s)
[TAISC-25-0066 - ID 722 - Grant Application Form.pdf](#)
[Signature Certificate TAISC-25-0066 - ID 722 - Grant Application Form.pdf](#)
[Approved Terms & Conditions - TAISC-25-0066-16/12/2025.pdf](#)

[Download All](#)

Approval Details
 Director or Equivalent - kn1ghtcrawler84@gmail.com - 16/12/2025 11:32
 CPO Management - cpomanager@openskydata.com

DOCUMENT REJECTION

After reviewed by the SA user, the document can be rejected using the red x icon if available.

Claims Payruns Documents Phases Summary Multi Annual Project Spend

[Upload Document](#) [Fill the Form](#) [Export Grid](#)

Document ID	Deliverable Phase	Document Deliverable	Current Year Allocation Request/Adjustment	Document Status	Action Required	Actions
Document ID	-- Select --	-- Select --		-- Select --	-- Select --	X
635	Phase 2 - Concept Development & Option Selection	Feasibility Report	-	NTA Preview	-	X ✓
566	Phase 1 - Scope and Purpose	CP - Gateway 5B Approval Request Form	-	Review Complete	-	
516	None	Allocation Adjustment Form	€300.00	Approved	-	
515	None	Allocation Adjustment Form	€500.00	Review Complete	-	
487	Phase 1 - Scope and Purpose	CP - Gateway 1 Approval Request Form	-	For NTA Approval	-	🔒

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

On clicking **Reject action icon**, the pop-up will appear on the screen with following comment text field and two buttons:

- Comments – Rejection comments are saved to the comment section of the document as an unresolved comment and saved in Document History
- Close – User can cancel this operation.
- Cancel Completely – document is completely cancelled without the possibility of resubmission
- Return for further adjustments – document is returned to the previous status with the possibility of making updates and resubmitting

Document Cancellation / Return

Comments *

On selecting Cancel Completely

- The document will be updated to Cancelled depending how far the document is into the review process.
 - If the document is on the sponsoring agency side (For SA Approval, NTA Preview, etc), it will be updated to cancelled and no email is sent to the document author.
 - If the document is currently with the NTA for review (For NTA Approval, Approval In Progress, etc) the document status will be updated to Not Approved by NTA and an email will be sent to the document approvers and the author informing them of the decision.
- Any existing Action required value is cleared automatically.
- After this action the user cannot resubmit this document.

On selecting Return for further adjustments

- Return for further adjustment is available in NTA preview and For SA approval status
- The document will update to the previous status.
- A new comment is added to the document and is marked unresolved.
- The action required value is updated appropriately based on who rejected the document.
 - If the NTA user has rejected the document for further adjustments, the action required will display 'Address NTA Queries'
 - If the Sponsoring Agency user has rejected the document for further adjustments, the action required will display 'Address SA Queries'
- The document can be updated and returned once the unresolved comment has been resolved.

After reviewed by the relevant user, any document of the Sponsoring Agency with relevant permissions can Cancel the document.

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

Results 12

Export Grid

Document ID	Project Code	Project Name	Project Type	Project Band	Deliverable Phase	Document Deliverable	Document Status	Actions
11	DRAFT/TAISC/24/0002	NPE TEST OSDS	Non-project expenditure	NPE Band 1	None	Grant Application Form	For SA Approval	 
12	DRAFT/TAISC/24/0003	NPE GAF No AUTO ASSIGN	Non-project expenditure	NPE Band 1	None	Grant Application Form	For SA Approval	 
13	DRAFT/TAISC/24/0004	NPE GAF NO ASSIGN ONLY AGENCY SELECTED	Non-project expenditure	NPE Band 1	None	Grant Application Form	For SA Approval	 
68	DRAFT/TAISC/24/0007	test	Capital Investment Project	Band 1	Phase 2 - Concept Development & Option Selection	Feasibility Report	NTA Preview	 

On clicking Reject action icon, the pop-up will appear on the screen with following:

- Are you sure you wish to cancel this document submission?
 - Note: If you click on 'Yes' button document will be cancelled. You won't be able to revert this operation.
 - Yes – cancel the document
 - No – popup window is closed and no changes are made
-
- Documents in 'SA Approval' status which are cancelled are returned to 'NTA Preview' status.
 - Documents in 'NTA Preview' status are updated to 'Cancelled' 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**.

Document ID	Project Code	Project Name	Sponsoring Agency	Project Type	Project Band	Deliverable Phase	Document Deliverable	Document Status	Actions
78	DRAFT/TAISC/24/0007	test	An Taisce	Capital Investment Project	Band 1	None	Gateway Approval Form	Approval In Progress	

Submitted By
[redacted].com

Submission Date
08/05/2024 08:00

Related File(s)
 TAISC-24-0007 - ID 78 - Gateway Approval Form

Document Description
-

Number of Comments not Resolved
0

Approval Details
NTA Senior Programme Manager - testhod@openskydata.com

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 Approved	13/06/2024 09:19:42		
Document Updated	07/06/2024 13:44:11		
Document Rejected	07/06/2024 13:43:51		
Document Updated	07/06/2024 13:20:51		
Document Updated	07/06/2024 12:16:01		
Document Created	08/05/2024 08:00:07		

 Close

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

History Details

Change Type
Document Approved

Change Date
08/05/2024 09:35:26

Created By


Details

BEFORE CHANGE

Document status
NTA Preview

AFTER CHANGE

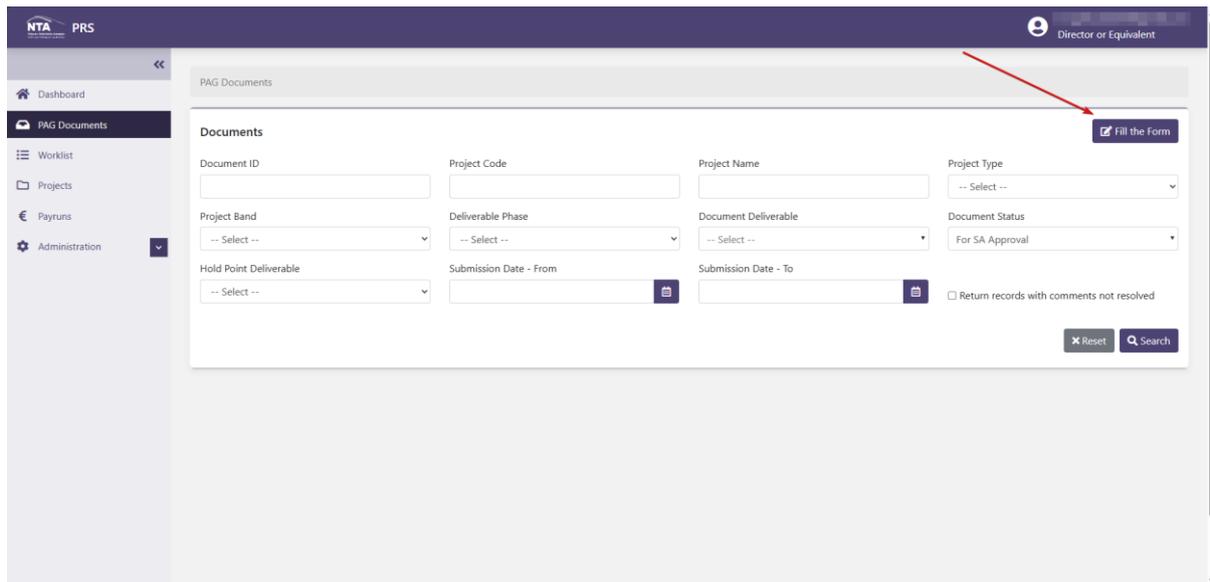
Document status
For SA Approval

 Close

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.

The screenshot shows the 'PAG Documents' interface in the NTYA PRS system. The page title is 'PAG Documents' and the user is identified as 'Director or Equivalent'. A sidebar on the left contains navigation options: Dashboard, PAG Documents (selected), Worklist, Projects, Payruns, and Administration. The main content area is titled 'Documents' and contains several input fields: Document ID, Project Code, Project Name, Project Type (dropdown), Project Band (dropdown), Deliverable Phase (dropdown), Document Deliverable (dropdown), Document Status (dropdown), Hold Point Deliverable (dropdown), Submission Date - From (calendar icon), and Submission Date - To (calendar icon). There is a checkbox for 'Return records with comments not resolved'. At the bottom right of the form area are 'Reset' and 'Search' buttons. A red arrow points to a 'Fill the Form' button located in the top right corner of the main content area.

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.

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



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
 - Non-Project Expenditure
- 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)

The screenshot displays the 'Project Grant Application Form' interface. On the left is a navigation sidebar with options: Dashboard, PAG Documents (selected), Worklist, Projects, Payruns, and Administration. The main content area shows 'Section 1 - Project Description and Full Description of Works Proposed'. A progress bar at the top indicates seven steps, with step 1 being the current section. Below the section title is a blue box with instructions: 'A full and detailed description of the proposed project/ scheme is required. The description should include the purpose, justification for and impact of the project. Please note that this section should specifically refer to the issue proposed to be solved, the objectives of the scheme, and the type of options to be considered. Where relevant, all applications must be accompanied with an appropriate supporting documentation requested by NTA.' The form contains several mandatory fields: Project Name (text input), Project Type (dropdown), Agency Project or Programme Manager (dropdown), Agency Director or Equivalent (dropdown), Programme (dropdown), Sub-Programme (dropdown), and Classification (dropdown). A large text area is provided for the Description. Below the description field is a file upload section with a 'Drag & Drop file here or Browse' button. At the bottom of the form are navigation buttons: Back, Download the Form, Cancel, Save as a Draft, Submit for NTA Preview, and Next.

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:

- Location
- Walking Kilometres
- 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: Walking Kilometres and 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?
 - Yes
 - NTA Contribution Date
 - Comments
 - 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
- 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: 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]

The screenshot shows the 'Project Grant Application Form' in Section 4 - Financial Information. The form includes several sections for funding details:

- Indicative Overall Total Cost of Project / Programme (€ EUR):** € 20,000.00
- NTA contribution to date (€ EUR):** € 5,000.00
- Co-funding/self-funding to date (€ EUR):** € 5,000

The **Section Summary** table is as follows:

Year	Funding sought from NTA	Co-funding/self-funding	Calculated indicative overall total cost of project / programme
Previous Funding	€5,000.00	€5,000	€5,000.00
Current Calendar Year	€5,000	€5,000	€5,000
Total Approved	€10,000.00	€5,000	€10,000.00

An error message is displayed below the table: **The Total Estimated €10,000.00 is not equal to the value provided in indicative Overall Total Cost of Project / Programme fee.**

➤ **Multi-annual project**

- Indicative Overall Total Cost of Project/Programme
- Comments
- Is this project part of a previous NTA funded project/programme?
 - Yes
 - NTA Contribution Date
 - Comments
 - 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)
- Add funding for another year

- Year
- Funding Sought from NTA for selected year
- Co-funding/self-funding for selected year
- Section Summary
- 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)

The application should clearly identify key indicative cost information. Please provide the NTA (cost management) quantities for capital projects. It should be noted that should approval be granted, funding is only provided for the current year. Future years/required funding should be captured in the standard annual budget process and cycles. All cost figures above should include measurable cost.

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)*

Comments*

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

NTA contribution to date (€ EUR)*

Comments*

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

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

Comments*

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

Funding Sought from NTA (€ EUR)* (Current calendar year only)

Co-funding/self-funding (€ EUR)* (Current calendar year only)

Year*

Funding Sought from NTA for selected year (€ EUR)*

Co-funding/self-funding for selected year (€ EUR)*

Section Summary

Year	Funding sought from NTA	Co-funding/self-funding	Calculated indicative overall total cost of project / programme
Previous Funding	€1,000,000	€1,000,000	€1,000,000
Current Calendar Year	€1,000,000	€1,000,000	€1,000,000
2021	€1,000,000	€1,000,000	€1,000,000
Total Estimated	€1,000,000	€1,000,000	€1,000,000

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.

Please upload supporting documentation where relevant for this section

Drop & Drop the files or [browse](#)

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.

The screenshot shows the 'Project Grant Application Form' interface. At the top, there is a breadcrumb trail 'PAG Documents / Project Grant Application Form'. Below this is a progress indicator with seven numbered steps (1-7), where step 1 is highlighted. The main heading is 'Section 1 - Project Description and Full Description of Works Proposed'. A blue box contains instructions: 'A full and detailed description of the proposed project/ scheme is required. The description should include the purpose, justification for and impact of the project. Please note that this section should specifically refer to the issue proposed to be solved, the objectives of the scheme, and the type of options to be considered. Where relevant, all applications must be accompanied with an appropriate supporting documentation requested by NTA.' Below this are several dropdown menus for 'Project Name', 'Project Type', 'Agency Project or Programme Manager', 'Agency Director or Equivalent', 'Programme', 'Sub-Programme', and 'Classification'. A large text area for 'Description' is provided. Below the description is a file upload section with a 'Drag & Drop file here or Browse' prompt. At the bottom, a navigation bar contains buttons: '< Back', 'Download the Form', 'Cancel' (highlighted with a green arrow), 'Save as a Draft', 'Submit for NTA Preview', 'Submit for Final Approval', and '> Next'.

Navigate between the Sections in Grant Application Form:

User can click on the **'Next'** button to go to next Section. Clicking the **'Next'** button will also perform an implicit save of the form.

This screenshot is identical to the one above, showing the 'Project Grant Application Form' interface. In this instance, a green arrow points to the '> Next' button in the bottom navigation bar.

User can click on the **'Back'** button to go to previous Section. Clicking the **'Back'** button will also perform an implicit save of the form.

PAG Documents / Project Grant Application Form

Project Grant Application Form

Section 1 - Project Description and Full Description of Works Proposed

A full and detailed description of the proposed project/ scheme is required. The description should include the purpose, justification for and impact of the project. Please note that this section should specifically refer to the issue proposed to be solved, the objectives of the scheme, and the type of options to be considered. Where relevant, all applications must be accompanied with an appropriate supporting documentation requested by NTA.

Project Name *

Project Type *

Agency Project or Programme Manager *

Agency Director or Equivalent *

Programme *

Sub-Programme *

Classification *

Description *

Please upload supporting documentation where relevant for this section

Drag & Drop file here or [Browse](#)

< Back Download the Form Cancel Save as a Draft Submit for NTA Preview Submit for Final Approval > Next

[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.

PAG Documents / Project Grant Application Form

Project Grant Application Form

Section 1 - Project Description and Full Description of Works Proposed

A full and detailed description of the proposed project/ scheme is required. The description should include the purpose, justification for and impact of the project. Please note that this section should specifically refer to the issue proposed to be solved, the objectives of the scheme, and the type of options to be considered. Where relevant, all applications must be accompanied with an appropriate supporting documentation requested by NTA.

Project Name *

Project Type *

Agency Project or Programme Manager *

Agency Director or Equivalent *

Programme *

Sub-Programme *

Classification *

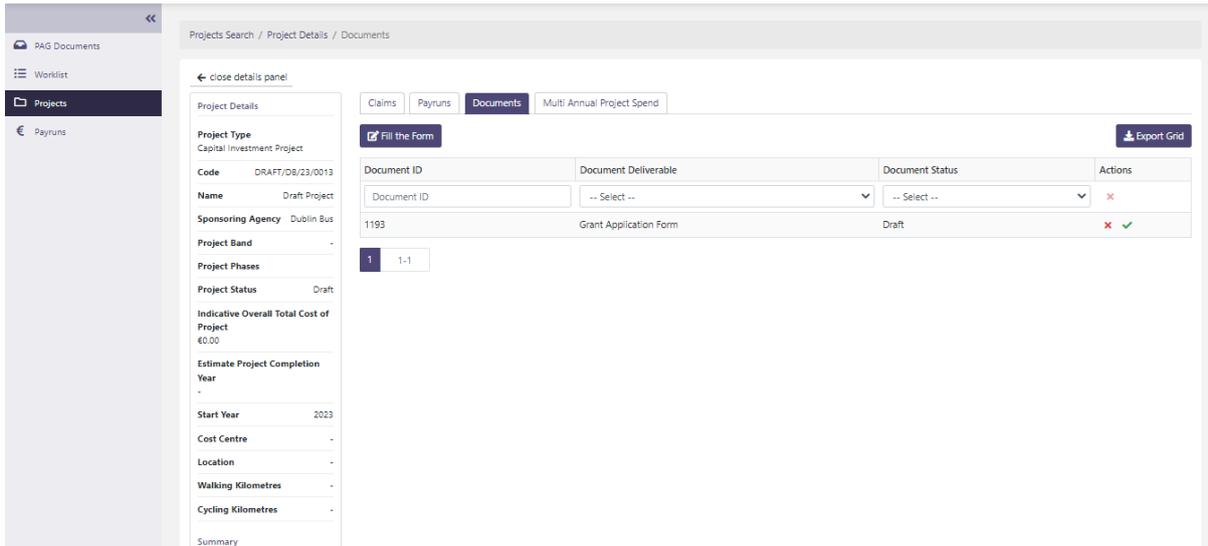
Description *

Please upload supporting documentation where relevant for this section

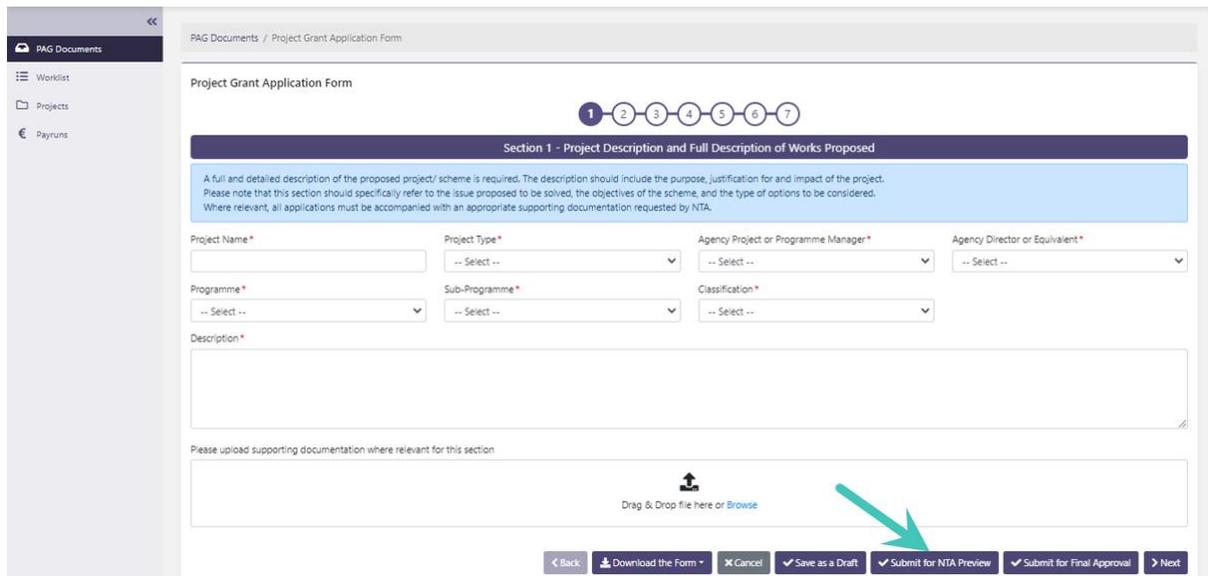
Drag & Drop file here or [Browse](#)

< Back Download the Form Cancel Save as a Draft Submit for NTA Preview Submit for Final Approval > Next

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.

NTA PRS | stivejack26@gmail.com | Project or Programme Manager

Projects Search / Project Details / Documents

← close details panel

Project Details

Project Type: ICT Project

Code: DRAFT/09/23/0014

Name: NTA Preview Project

Sponsoring Agency: Dublin Bus

Project Band: Band 1

Project Phases: Phase 0: Initiated

Project Status: Draft

Indicative Overall Total Cost of Project: €200.00

Estimate Project Completion Year: -

Start Year: 2023

Cost Centre: -

Location: -

Walking Kilometres: -

Cycling Kilometres: -

Summary

Claims | Payruns | Documents | Multi Annual Project Spend

Fill the Form | Export Grid

Document ID	Document Deliverable	Document Status	Actions
Document ID	-- Select --	-- Select --	X
1194	Grant Application Form	For SA Approval	X

Note: 'Submit for Final Approval' button is only visible to the designated 'Project or Programme Manager' or 'Director or Equivalent' and is also available where the same user roles have been granted access to the project.

If access is required the user can contact Agency Administrator to get the access.

Project Grant Application Form

1 2 3 4 5 6 7

Section 1 - Project Description and Full Description of Works Proposed

A full and detailed description of the proposed project/ scheme is required. The description should include the purpose, justification for and impact of the project. Please note that this section should specifically refer to the issue proposed to be solved, the objectives of the scheme, and the type of options to be considered. Where relevant, all applications must be accompanied with an appropriate supporting documentation requested by NTA.

Project Name *
New Project

Project Type *
Capital Investment Project

Agency Project or Programme Manager *
stivejack26@gmail.com

Agency Director or Equivalent *
michajadczak168@gmail.com

Programme *
BB.2 HEAVY RAIL SAFETY & DEVELOPMENT

Sub-Programme *
Heavy Rail

Classification *
Irish Rail

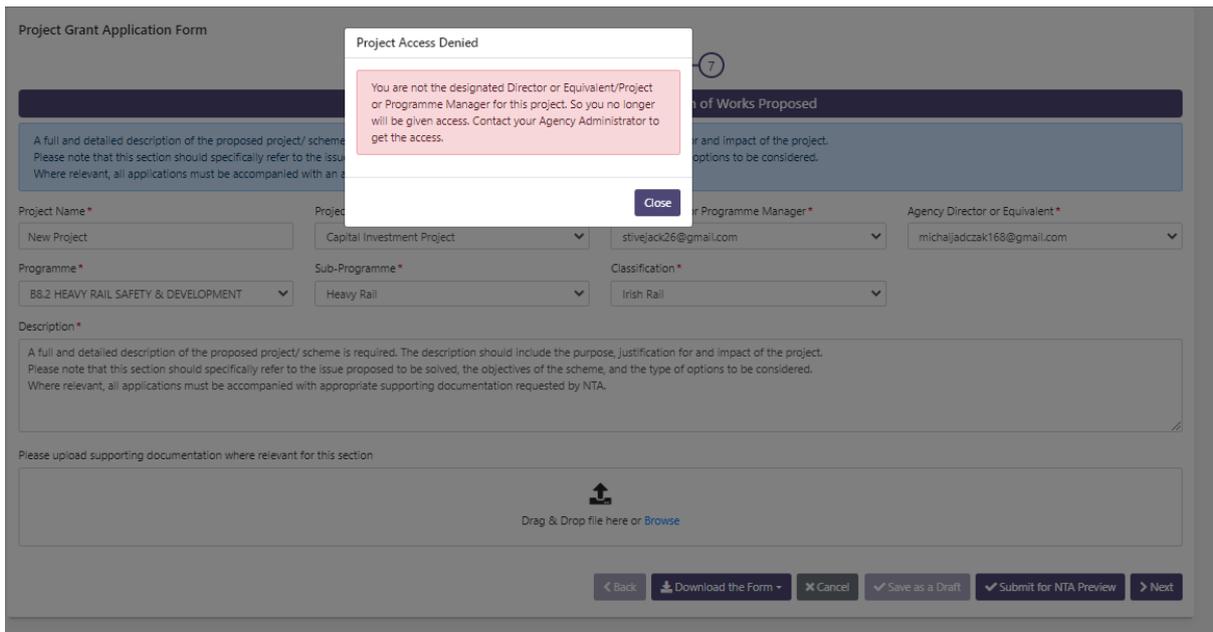
Description *

A full and detailed description of the proposed project/ scheme is required. The description should include the purpose, justification for and impact of the project. Please note that this section should specifically refer to the issue proposed to be solved, the objectives of the scheme, and the type of options to be considered. Where relevant, all applications must be accompanied with appropriate supporting documentation requested by NTA.

Please upload supporting documentation where relevant for this section

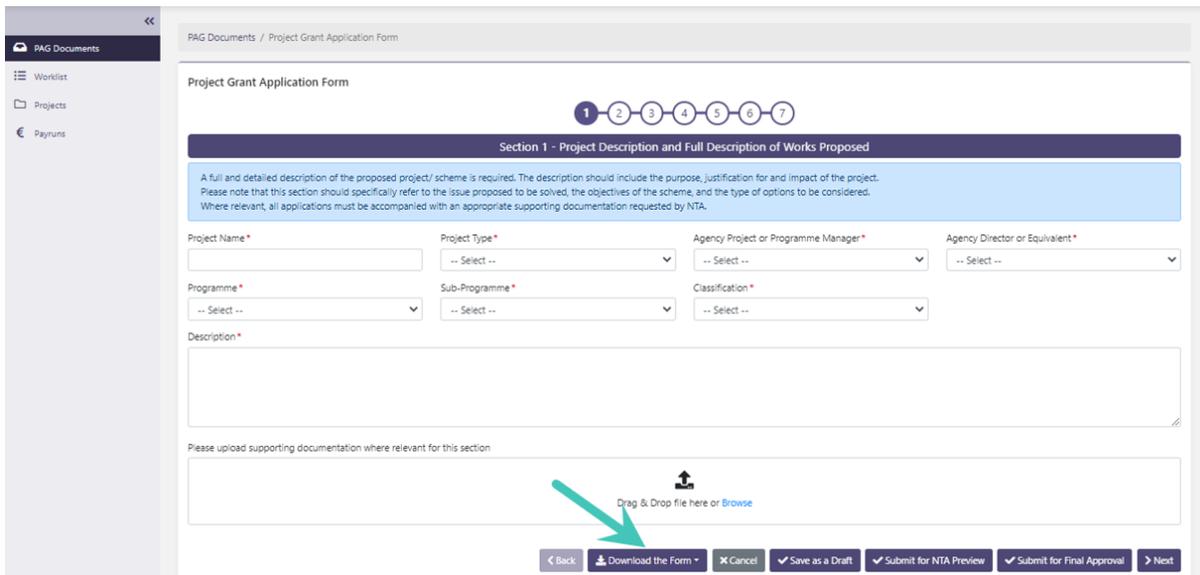
Drag & Drop file here or Browse

Back | Download the Form | Cancel | Save as a Draft | Submit for NTA Preview | Next



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

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



6. 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, and Project or Programme Manager the Claim status will be pre-set to '**Draft**'

Worklist

Claims

Claim Reference Number Project Code Project Name Category

Claim Status

Results

Claim Reference Number	Project Code	Project Name	Creation Date	Submitted By	Verified By	Status	Approved By	Total	Actions
120	TAISC/19/0001	Jewelery & Books	19/07/2021 08:06			Draft		€50.00	<input type="checkbox"/> <input checked="" type="checkbox"/>
116	TAISC/19/0001	Jewelery & Books	06/07/2021 09:26			Draft		€10.00	<input type="checkbox"/> <input checked="" type="checkbox"/>
115	TAISC/19/0001	Jewelery & Books	05/07/2021 15:49			Draft		€100.00	<input type="checkbox"/> <input checked="" type="checkbox"/>
114	TAISC/19/0001	Jewelery & Books	05/07/2021 15:41			Draft		€1,600.00	<input type="checkbox"/> <input checked="" type="checkbox"/>

1-1

- For Finance Officer and Director or Equivalent user the Claim Status will be pre-set to **'For SA Approval'**

Claims

Claim Reference Number Project Code Project Name Category

Claim Status

Results

Claim Reference Number	Project Code	Project Name	Creation Date	Submitted By	Verified By	Status	Approved By	Total	Actions
117	TAISC/21/0002	OSDS QA 2	07/07/2021 09:24			For Finance Officer verification		€45.00	<input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
113	TAISC/21/0001	OSDS QA	01/07/2021 14:51			For Finance Officer verification		€200.00	<input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
112	TAISC/19/0001	Jewelery & Books	16/06/2021 15:55			For Finance Officer verification		€100.00	<input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
78	TAISC/19/0001	Jewelery & Books	02/06/2021 20:22	seed@seed.com		For Finance Officer verification		€259.70	<input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
77	TAISC/19/0001	Jewelery & Books	02/06/2021 20:22	seed@seed.com		For Finance Officer verification		€392.09	<input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
71	TAISC/19/0001	Jewelery & Books	02/06/2021 20:22	seed@seed.com		For Finance Officer verification		€144.02	<input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>

1-1

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

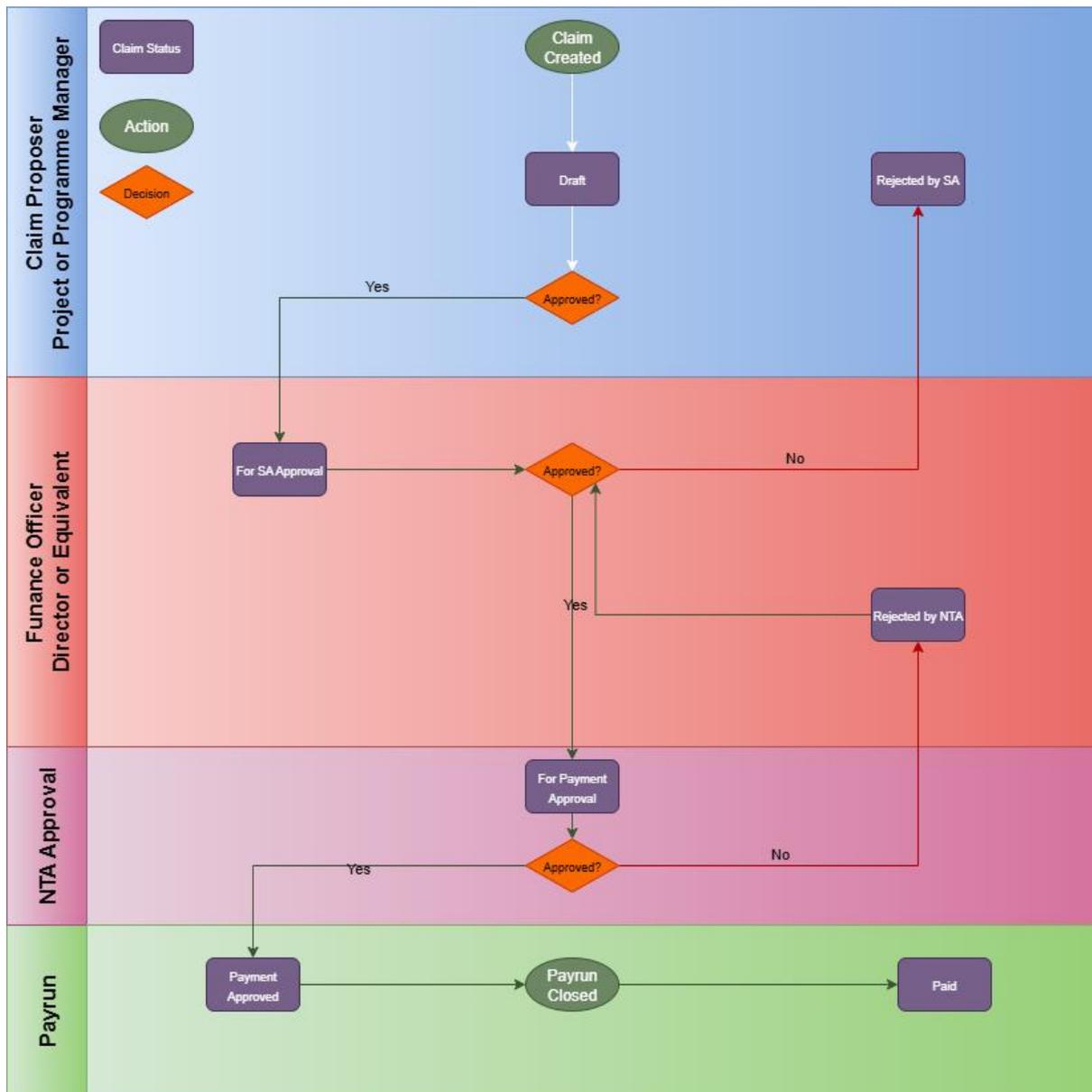
Once a search has been performed and results are returned the user can view the claim details by simply clicking anywhere on the line item. This will show the user the following details (where available):

- 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	DCC/21/0004	Amiens St to Georges / City Quay Cycle Scheme	26/07/2021 10:51			Draft		€4,500.00	

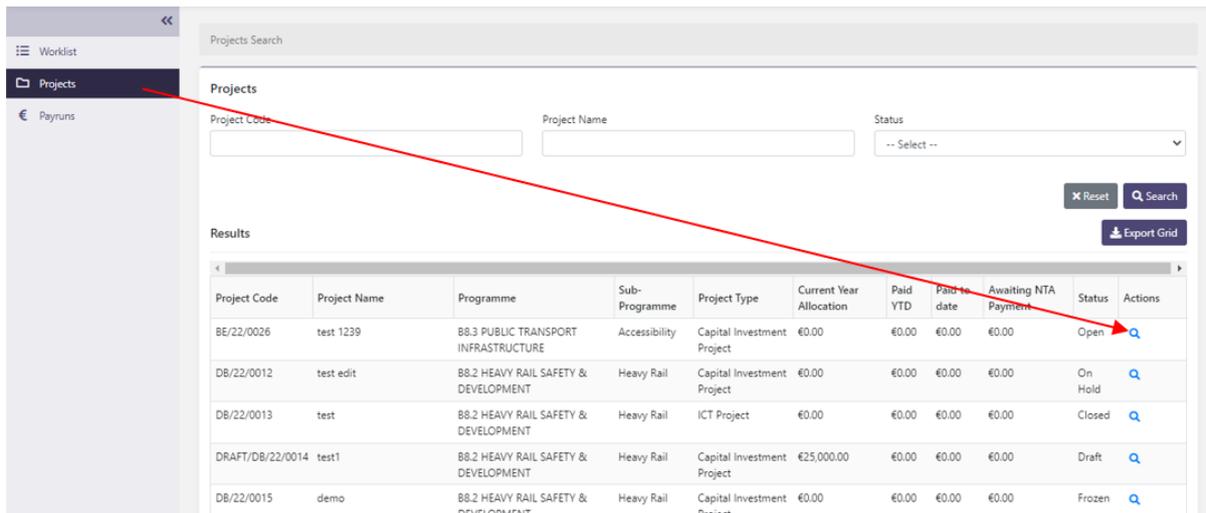
Category Details		Payrun Number	
Design/Planning	€1,500.00	-	
Construction/Implementation	€3,000.00	Approval Date	
Claim Description		-	
Claim description test		Paid Date	
Document		-	
PDF Test File.pdf			
Verification Date			
-			
Number of Comments			
0			

CLAIM STATUS WORKFLOW

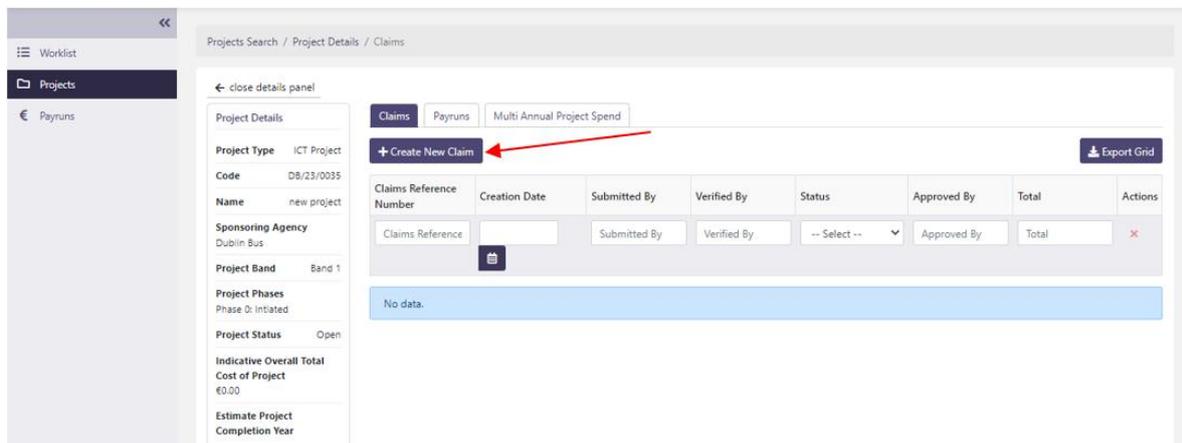


CREATE A CLAIM

As a **Claims Proposer, Project or Programme Manager** 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.

Add/Edit Claim

Claim Reference Number <i>Will be auto generated</i>	Total Claim Amount €0.00
---	-----------------------------

Claim Description

Add Attachment *


 Drag & Drop file here or [Browse](#)

#1 Category details

Category* -- Select --	Amount (€ EUR)* X.XX
---------------------------	-------------------------

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' Error will not appear if Claim is a negative one.

EDIT CLAIM DETAILS

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

- Draft
- For SA Approval
- Rejected by SA
- 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.

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

Category Details	Payrun Number
Design/Planning €1,500.00	-
Construction/Implementation €3,000.00	
Claim Description	Approval Date
Claim description test	-
Document	Paid Date
 PDF Test File.pdf	-
Verification Date	
-	
Number of Comments	
0	



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

- Claim Reference Number
- Category Details
 - Add Category Details
 - 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.

Add/Edit Claim

Claim Reference Number	Total Claim Amount
<i>Will be auto generated</i>	€4,500.00

Claim Description

Claim description test

Add Attachment *

PDF Test File.pdf

#1 Category details

Category *	Amount (€ EUR) *
Design/Planning	1500.00

[Remove Category Details](#)

#2 Category details

Category *	Amount (€ EUR) *
Construction/Implementation	3000.00

[Remove Category Details](#)

[+ Add Category Details](#)

[Cancel](#)
[Save](#)

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**.

Results

Claim Reference Number	Project Code	Project Name	Creation Date	Submitted By	Verified By	Status	Approved By	Total	Actions
117	TAISC/21/0002	OSDS QA 2	07/07/2021 09:24	[redacted]		For Finance Officer verification		€45.00	
113	TAISC/21/0001	OSDS QA	01/07/2021 14:51	[redacted]		For Finance Officer verification		€200.00	
112	TAISC/19/0001	Jewelry & Books	16/06/2021 15:55	[redacted]		For Finance Officer verification		€100.00	

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

Comments

+ Add Comment

Comment Number	Created By	Created Date	Comment	Actions
8	[REDACTED]	26/07/2021 12:10	Test Comment	 

1 1-1

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.

Comments

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

Comment *

This is a test comment

Cancel

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**.

Comments

+ Add Comment

Comment Number	Created By	Created Date	Comment	Actions
8	[REDACTED]	26/07/2021 12:10	Test Comment	 

1 1-1

Edit

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	[Redacted]	26/07/2021 12:10	Test Comment	[Edit] [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	[Redacted]	🔍
Comment Created	26/07/2021 12:10:58	[Redacted]	🔍

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	
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 SA Approval** status the **Claim Proposer or Project or Programme Manager** 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

Claim Status

[Reset](#) [Search](#)

Results

Claim Reference Number	Project Code	Project Name	Creation Date	Submitted By	Verified By	Status	Approved By	Total	Actions
120	TAISC/19/0001	Jewellery & Books	19/07/2021 08:06			Draft		€50.00	<input type="checkbox"/> <input checked="" type="checkbox"/>
116	TAISC/19/0001	Jewellery & Books	06/07/2021 09:26			Draft		€10.00	<input type="checkbox"/> <input checked="" type="checkbox"/>
115	TAISC/19/0001	Jewellery & Books	05/07/2021 15:49			Draft		€100.00	<input type="checkbox"/> <input checked="" type="checkbox"/>
114	TAISC/19/0001	Jewellery & Books	05/07/2021 15:41			Draft		€1,600.00	<input type="checkbox"/> <input checked="" type="checkbox"/>

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 SA Approval** 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 SA Approval** status.

When the Finance Officer or Director or Equivalent user logs in they are automatically brought to the Worklist section with the claims status of **For SA Approval** 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.

Claims

Claim Reference Number Project Code Project Name Category

Claim Status

Results

Claim Reference Number	Project Code	Project Name	Creation Date	Submitted By	Verified By	Status	Approved By	Total	Actions
117	TAISC/21/0002	OSDS QA 2	07/07/2021 09:24	[redacted]		For Finance Officer verification		€45.00	<input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/>
113	TAISC/21/0001	OSDS QA	01/07/2021 14:51	[redacted]		For Finance Officer verification		€200.00	<input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/>
112	TAISC/19/0001	Jewellery & Books	16/06/2021 15:55	[redacted]		For Finance Officer verification		€100.00	<input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/>
78	TAISC/19/0001	Jewellery & Books	02/06/2021 20:22	seed@seed.com		For Finance Officer verification		€259.70	<input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/>

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.

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.

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**.

Results

Claim Reference Number	Project Code	Project Name	Creation Date	Submitted By	Verified By	Status	Approved By	Total	Actions
117	TAISC/21/0002	OSDS QA 2	07/07/2021 09:24	[Redacted]	[Redacted]	For Finance Officer verification	[Redacted]	€4,500.00	  

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

Claim Description	Approval Date
Claim description test	-

Document	Paid Date
 PDF.pdf	-

Verification Date
-

Number of Comments
1



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

Claim History

Change Type	Change Date	Created By	Actions
-- Select --		Created By	
Claim Updated	09/06/2021 15:55:34	[Redacted]	
Claim Rejected	09/06/2021 15:15:31	[Redacted]	
Claim Approved	09/06/2021 14:26:54	[Redacted]	
Claim Created	09/06/2021 08:58:58	[Redacted]	

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

7. PROJECTS

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.

History Details

Change Type	Change Date
Claim Updated	17/10/2025 12:28
Created By	

Details

BEFORE CHANGE	AFTER CHANGE
Category 1	Category 1
Design/Planning - 100.00	Construction/Implementation - 100.00
Description	Description
Test	Test updated change

✕ Close

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
 - Draft
 - On Hold
 - Open
 - Closed
 - Frozen

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

Projects Search

Projects

Project Code Project Name Status

[Reset](#) [Search](#)

Results [Export Grid](#)

Project Code	Project Name	Programme	Sub-Programme	Project Type	Current Year Allocation	Claimed This Year	Total Claimed to Date	Awaiting NTA Payment	Status	Actions
DRAFT/TAISC/24/0002	NPE TEST OSDS	B8.1 SUSTAINABLE URBAN TRANSPORT	GDA	Non-project expenditure	€0.00	€0.00	€0.00	€0.00	Draft	Q
DRAFT/TAISC/24/0003	NPE GAF No AUTO ASSIGN	B8.1 SUSTAINABLE URBAN TRANSPORT	GDA	Non-project expenditure	€0.00	€0.00	€0.00	€0.00	Draft	Q
DRAFT/TAISC/24/0004	NPE GAF NO ASSIGN ONLY AGENCY SELECTED	B8.1 SUSTAINABLE URBAN TRANSPORT	GDA	Non-project expenditure	€0.00	€0.00	€0.00	€0.00	Draft	Q

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.

Projects

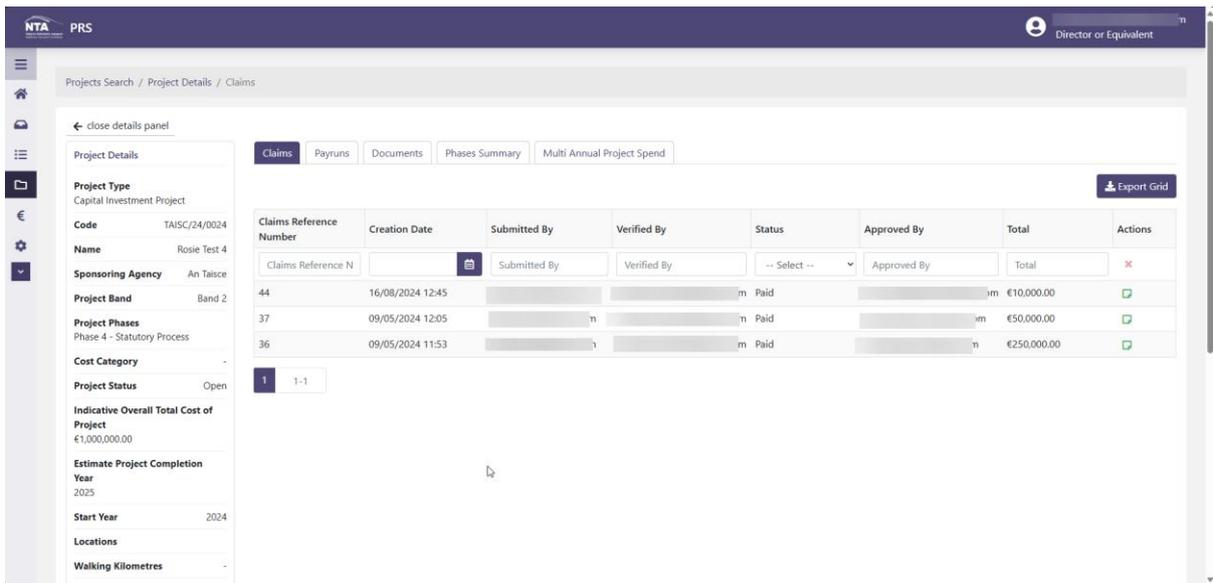
Project Code Project Name Status

[Reset](#) [Search](#)

Results [Export Grid](#)

Project Code	Project Name	Programme	Sub-Programme	Project Type	Current Year Allocation	Claimed This Year	Total Claimed to Date	Awaiting NTA Payment	Status	Actions
DRAFT/TAISC/24/0002	NPE TEST OSDS	B8.1 SUSTAINABLE URBAN TRANSPORT	GDA	Non-project expenditure	€0.00	€0.00	€0.00	€0.00	Draft	Q
DRAFT/TAISC/24/0003	NPE GAF No AUTO ASSIGN	B8.1 SUSTAINABLE URBAN TRANSPORT	GDA	Non-project expenditure	€0.00	€0.00	€0.00	€0.00	Draft	Q
DRAFT/TAISC/24/0004	NPE GAF NO ASSIGN ONLY AGENCY SELECTED	B8.1 SUSTAINABLE URBAN TRANSPORT	GDA	Non-project expenditure	€0.00	€0.00	€0.00	€0.00	Draft	Q

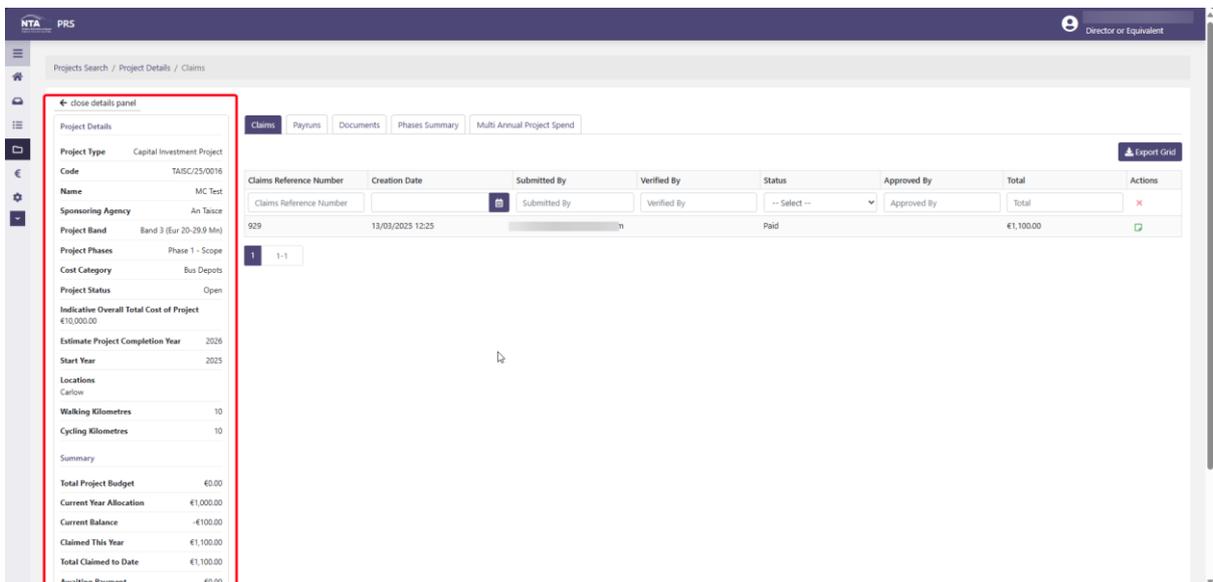
The system then displays the project dashboard which contains all project details, associated claims, payruns, documents & project spends.



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
- Non-project expenditure

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
 - Phase 1: Scope and Purpose
 - Phase 2-5: Combined
 - Phase 6-7: Combined
- For Band 2 and 3 - Capital Investment Projects
 - 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:

- 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

Cost Category

The Cost Category assigned to the project.

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 commences on PRS.

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 approved project budget assigned to the project.

Current Year Allocation

The projects allocation for the current year.

Current Balance

The remaining balance for the current year allocation 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.

Claimed This Year

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

Total Claimed 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 NTA programme of the project

Sub-Programme

The current NTA sub-programme of the project

Classification

The current NTA 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

Gatekeeper

The assigned gatekeeper for the project.

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

Description of the project provided during submission of the Grant Application Form

Original Indicative Overall Total Cost of Project

This is the original Indicative overall total cost of the project filled on section 4 of a Grant Application form. Once submitted, any further edits will not change this original value.

Original Estimate Project Completion Year

This will display the Original estimated project completed year submitted in the Grant Application form. This does not change when further edits are made in edit project details.

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

Projects Search / Project Details / Claims

← close details panel

Project Details

Project Type
Capital Investment Project

Code
TAISC/25/0016

Name
MC Test

Sponsoring Agency
An Taisce

Project Band
Band 3 (Eur 20-29.9 Mn)

Project Phases
Phase 1 - Scope

Cost Category
Bus Depots

Project Status
Open

Indicative Overall Total Cost of Project
€10,000.00

Estimate Project Completion Year
2026

Start Year
2025

Locations
Carlow

Claims Payruns Documents Phases Summary Multi Annual Project Spend

Export Grid

Claims Reference Number	Creation Date	Submitted By	Verified By	Status	Approved By	Total	Actions
Claims Reference Nu		Submitted By	Verified By	-- Select --	Approved By	Total	✕
929	13/03/2025 12:25			Paid		€1,100.00	📄

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

Projects Search / Project Details / Payruns

← close details panel

Project Details

Project Type
Capital Investment Project

Code
TAISC/25/0016

Name
MC Test

Sponsoring Agency
An Taisce

Project Band
Band 3 (Eur 20-29.9 Mn)

Project Phases
Phase 1 - Scope

Cost Category
Bus Depots

Project Status
Open

Indicative Overall Total Cost of Project
€10,000.00

Estimate Project Completion Year
2026

Start Year
2025

Locations
Carlow

Claims Payruns Documents Phases Summary Multi Annual Project Spend

Export Grid

Payrun Number	Paid Date	Claim Reference Number	Total Paid	Actions
Payrun Number		Claim Reference Number		✕
36	05/06/2025 08:43	929	€1,100.00	☰

DOCUMENTS

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
- Deliverable Phase
- Document Deliverable
- Document Status
- Actions

Projects Search / Project Details / Documents

← close details panel

Project Details

Project Type
Capital Investment Project

Code
TAISC/24/0042

Name
Test Project

Sponsoring Agency
An Taisce

Project Band
Band 1

Project Phases
Phase 3 - Preliminary Design

Project Status
Open

Indicative Overall Total
Cost of Project
€70,000.00

Estimate Project
Completion Year
2024

Start Year
2024

Cost Centre
Accounts payable / receivable
& grant administration

Claims Payruns **Documents** Phases Summary Multi Annual Project Spend

Upload Document Fill the Form Export Grid

Document ID	Deliverable Phase	Document Deliverable	Document Status	Actions
Document ID	-- Select --	-- Select --	-- Select --	✕
281	Phase 5 - Detailed Design & Procurement	CP - Tender Report	For SA Approval	✕ ✓
280	Phase 5 - Detailed Design & Procurement	CP - Gateway 5 Approval Request Form	For SA Approval	✕ ✓
276	Phase 7 - Close-out & Review	CP - Gateway 7 Approval Request Form	For NTA Approval	
275	Phase 7 - Close-out & Review	Project Completion Report	For NTA Approval	
274	Phase 4 - Statutory Process	Planning Outcome Report	For NTA Approval	
273	Phase 4 - Statutory Process	CP - Gateway 4 Approval Request Form	For NTA Approval	
272	Phase 4 - Statutory Process	Final documentation for planning/statutory consent	For NTA Approval	📄
271	Phase 3 - Preliminary Design	Preliminary Design Report	For NTA Approval	
270	Phase 3 - Preliminary Design	CP - Gateway 3 Approval Request Form	For NTA Approval	
206	None	Gateway Approval Form	Gatekeeper Review	

1 2 3 > >> 1-3

The user will be able to click on a document to expand the record and view any details related to the documents already submitted.

I can see:

- **Submitted by** – user who submitted the document
- **Submission Date** – date of submission
- **Related Files** – Any uploaded files which are attached to the record. These can be downloaded on clicking the file name
- **Document Description**
- **Number of Comments not Resolved** – provides a count of comments which are not marked as resolved.
- **Approval Details**

Approval Details provides information for users which are required to provide a signature on a document or online form.

I can see:

- The user role and email address of the user which is required to provide a DocuSign signature.
- The date & time, if a user has already signed and approved.
- Approval comments

- Users which still need to provide a signature and Approve will have no date & time

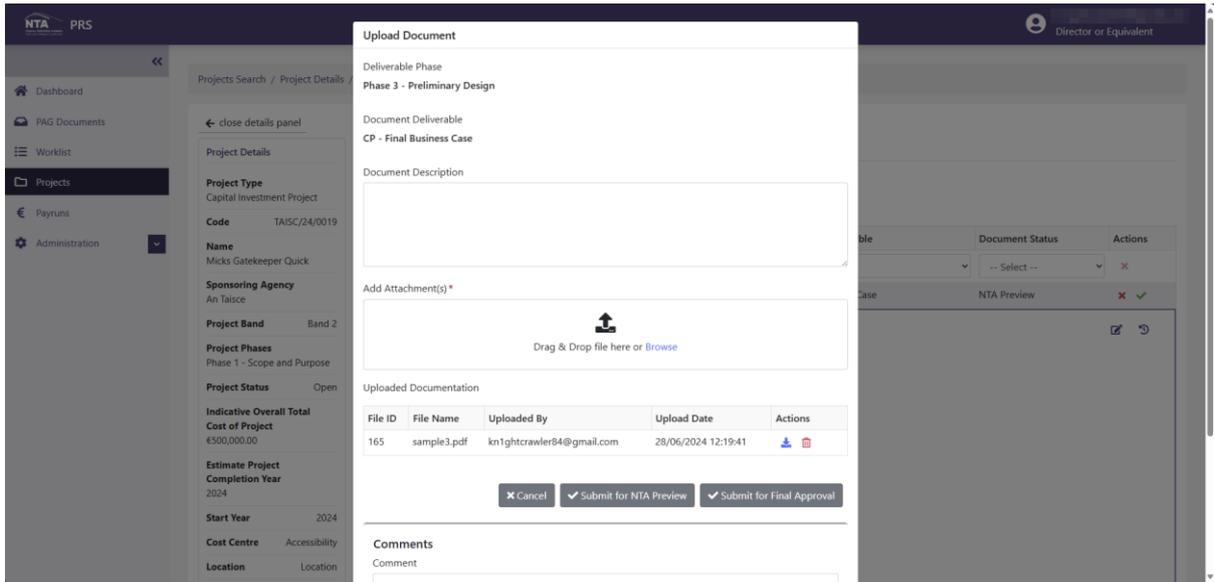
DOCUMENT EDIT

Document and form Edit will be available where the status is Draft or NTA Preview

To do this, the user can select the 'Edit' icon on the right side of the details window.

Document ID	Deliverable Phase	Document Deliverable	Document Status	Actions
Document ID	-- Select --	-- Select --	-- Select --	X
287	Phase 3 - Preliminary Design	CP - Final Business Case	NTA Preview	X ✓

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.

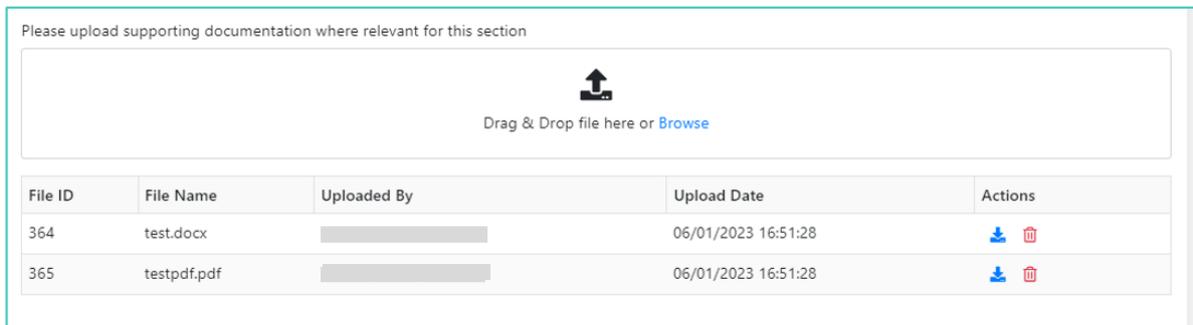


Once all necessary changes have been made, the user can click on “Submit for NTA Preview” or “Submit for Final Approval”.

UPLOADED DOCUMENTS GRID

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

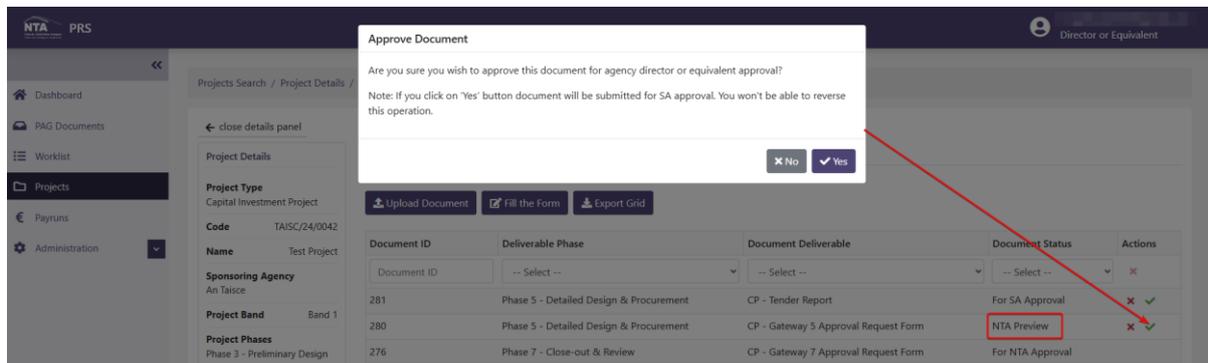
- File ID
- File Name
- Uploaded By
- Upload Date
- Actions
 - Download action icon - allows to download the attachment
 - Remove action icon - allows to remove the attachment



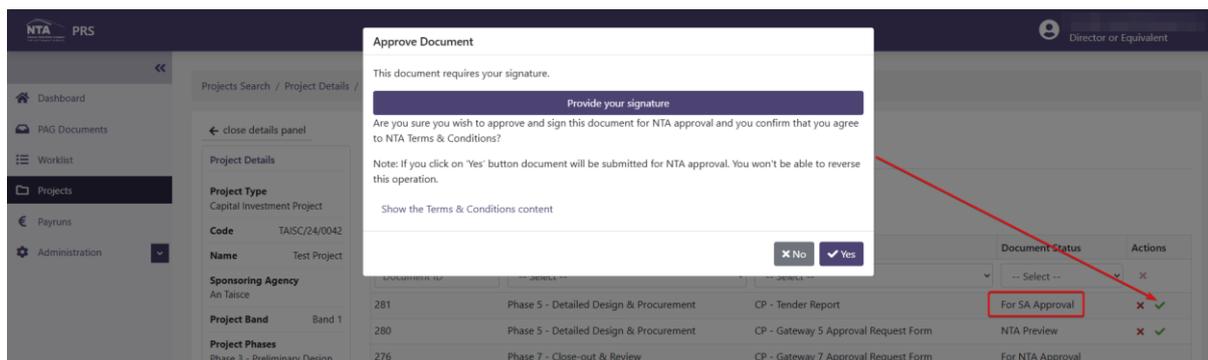
DOCUMENT APPROVAL

On clicking **Approve action icon**, depending on the status of the document the below scenarios may occur:

Documents in 'NTA Preview' status can be approved by the project or programme manager, director or equivalent or SA Administrator user and the status will be updated to 'For NTA Approval' where no SA signature is required.



Where a SA signature is required, the document will move from NTA Preview to 'For SA Approval' status to be Approved and signed with a signature by Director or Equivalent user. On clicking Approve the below screen will be displayed.



Where documents require a signature, this will also generate an "Approved Terms & Conditions" document in the 'Related File(s)' section [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.

Document ID	Document Deliverable	Document Status	Actions
Document ID	-- Select --	-- Select --	✘
1200	Project Funding Continuance Form	Draft	✘ ✔
1199	Project Funding Continuance Form	For SA Approval	✘ ✔
1197	Grant Application Form	NTA Preview	✘ ✔

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

Cancel Document

Are you sure you wish to cancel this document submission?

Note: If you click on 'Yes' button document will be cancelled. You won't be able to revert this operation.

✘ No
✔ Yes

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**.

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	✖ ✔

Submitted By
-

Submission Date
-

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

Number of Comments not Resolved
0

Approval Details

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

Document Updated

Change Date

15/12/2022 10:07:53

Created By

[Redacted]

Details

BEFORE CHANGE

AFTER CHANGE

Status

NTA Preview

Status

For SA Approval

Section 6 description

-

Section 6 description

test

Project contact person

-

Project contact person

**Maggie: FinancialApprovals, 3567898764,
maggie567@demo.com, Admin, ;**

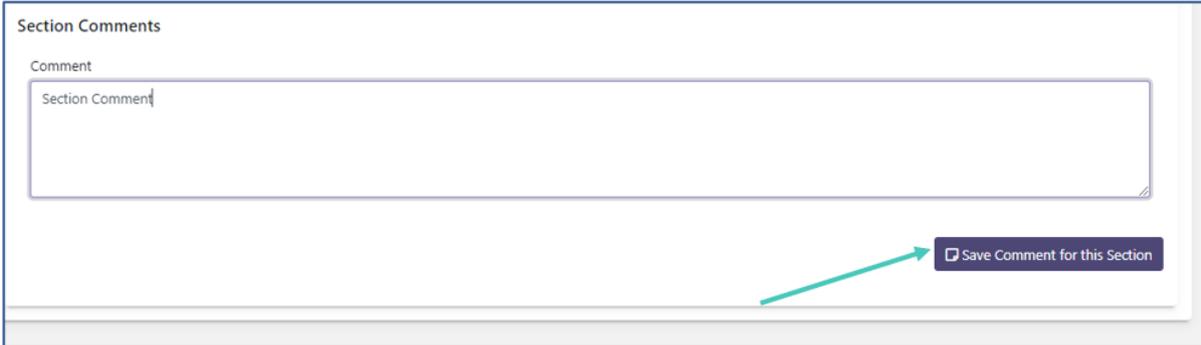
X Close

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.



Section Comments

Comment

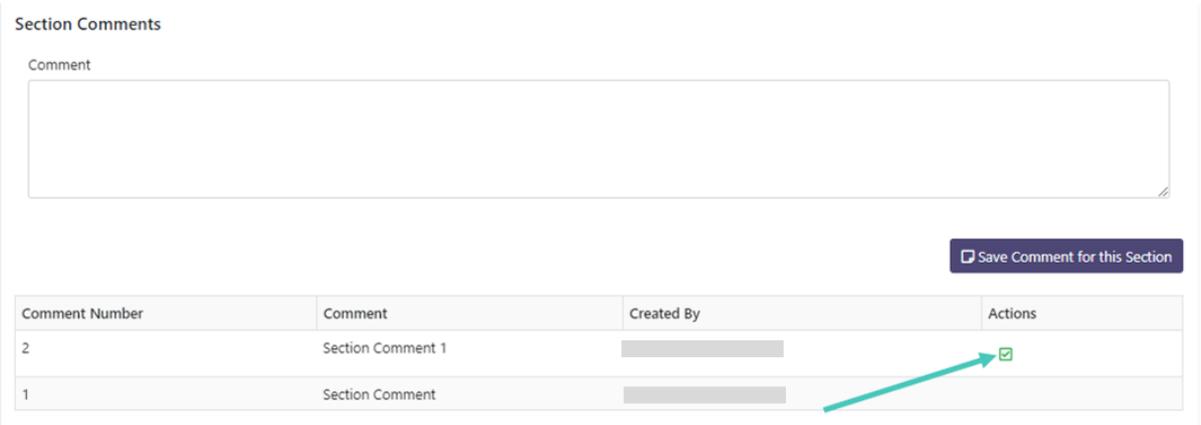
Section Comment

Save Comment for this Section

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.



Section Comments

Comment

Save Comment for this Section

Comment Number	Comment	Created By	Actions
2	Section Comment 1		<input checked="" type="checkbox"/>
1	Section Comment		

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

Resolve comment

Resolution Comment*

✕ Cancel
✓ Resolve

Section Comments

Comment

Save Comment for this Section

Comment Number	Comment	Created By	Actions
2	Section Comment 1	[Redacted]	<input checked="" type="checkbox"/>
1	Section Comment	[Redacted]	

Created Date
06/01/2023 19:12

Resolved By
[Redacted]

Resolution Date
06/01/2023 19:15

Resolution Comment
Resolved Section Comment

UPLOAD DOCUMENT

To upload a new document, select the **Upload Document** button.

Projects Search / Project Details / Documents

← close details panel

Project Details

Claims Payruns **Documents** Phases Summary Multi Annual Project Spend

Project Type
Capital Investment Project

Upload Document **Fill the Form** **Export Grid**

Code TAISC/24/0042

Name Test Project

Sponsoring Agency
An Taisce

Project Band Band 1

Project Phases
Phase 3 - Preliminary Design

Project Status Open

Document ID	Deliverable Phase	Document Deliverable	Document Status	Actions
Document ID	-- Select --	-- Select --	-- Select --	✕
281	Phase 5 - Detailed Design & Procurement	CP - Tender Report	For SA Approval	✕ ✓
280	Phase 5 - Detailed Design & Procurement	CP - Gateway 5 Approval Request Form	For SA Approval	✕ ✓
276	Phase 7 - Close-out & Review	CP - Gateway 7 Approval Request Form	For NTA Approval	
275	Phase 7 - Close-out & Review	Project Completion Report	For NTA Approval	

The system will then present a pop-up asking the user to select a Deliverable Phase and Document Deliverable. I can add a document description if needed.

The allowed formats for uploaded documents are: .pdf, .doc, .docx, .txt, .jpg, .png and .bmp.

Upload Document

Deliverable Phase *

-- Select --

Document Deliverable *

-- Select --

Document Description

Add Attachment(s) *



Drag & Drop file here or [Browse](#)

✕ Cancel
✓ Save as a Draft
✓ Submit for NTA Preview
✓ Submit for Final Approval

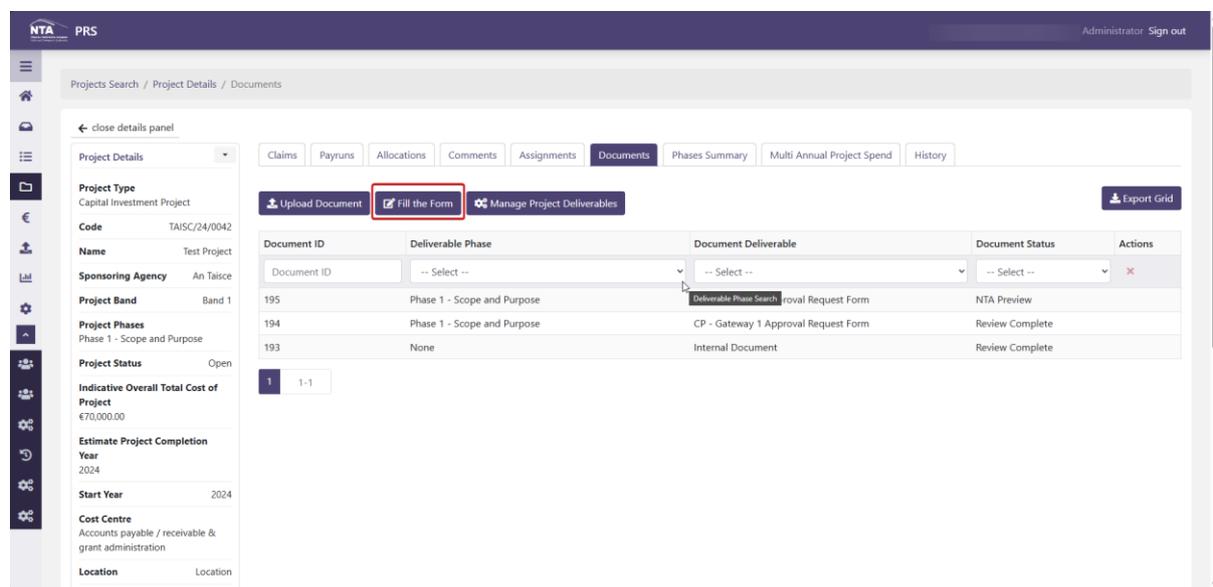
Documents uploaded by external users will go to “For NTA Approval” status on ‘Submit for final approval’ where the document does not Require SA Director or Equivalent Signature.

If the document being uploaded has a Require SA Director or Equivalent Signature requirement, the status will be updated to “For SA Approval” status on ‘Submit for Final Approval’.

FILL THE FORM

Users can access the **Fill the Form** button to request a form to be Deferred from one project phase to another project phase or Removed from a Project phase.

This can be done by clicking the “Fill the Form” button.



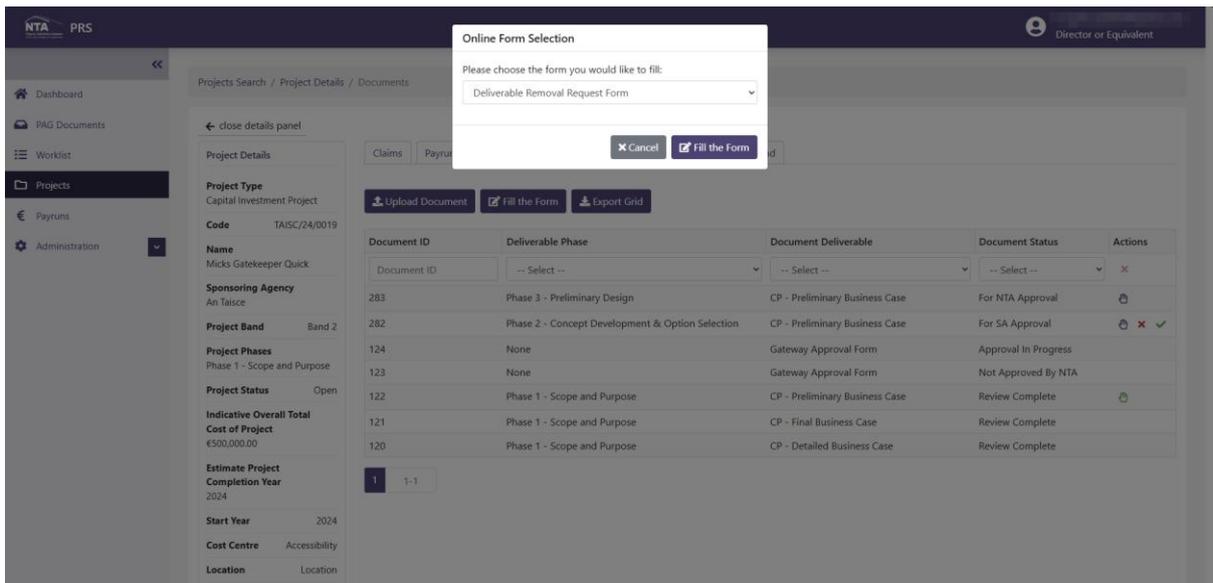
Document ID	Deliverable Phase	Document Deliverable	Document Status	Actions
Document ID	-- Select --	-- Select --	-- Select --	X
195	Phase 1 - Scope and Purpose	Deliverable Phase Search Approval Request Form	NTA Preview	
194	Phase 1 - Scope and Purpose	CP - Gateway 1 Approval Request Form	Review Complete	
193	None	Internal Document	Review Complete	

The user can then choose from the below two options:

- Deliverable Removal Request form
- Deliverable Deferral Form

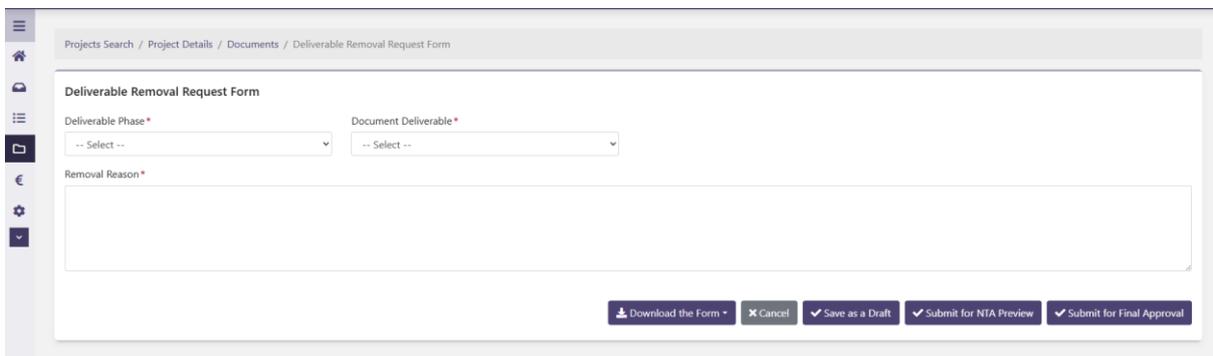
DELIVERABLE REMOVAL REQUEST FORM

To submit a Deliverable Removal Request form, the user will select the option from the dropdown and click on “Fill the Form” button to open the removal request form.

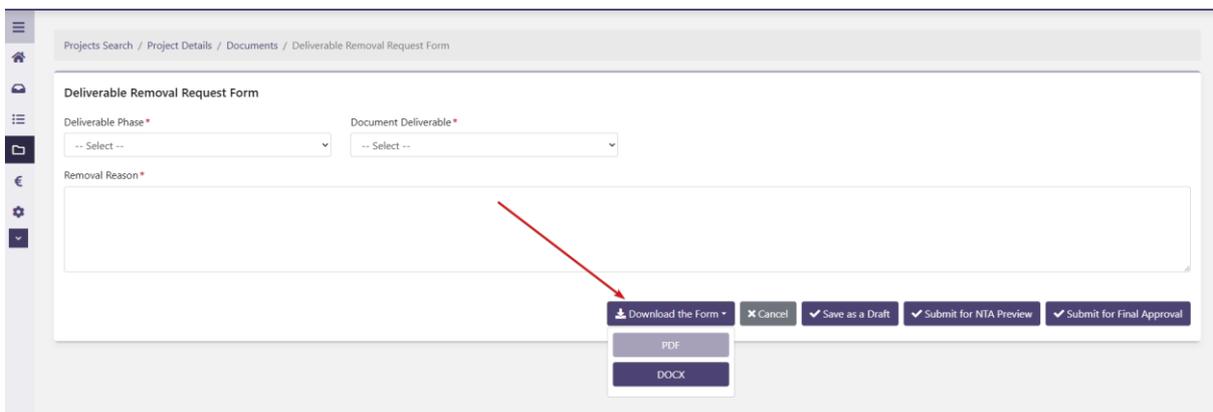


On the Deliverable Removal Request Form, the user can see the below fields:

- **Deliverable Phase** - displays a list of deliverable phases from the projects selected schema.
- **Document Deliverable** – will display all document deliverables which are expected for delivery based on the selected Deliverable Phase selection.
- **Removal Reason** – Text field for providing a removal reason.



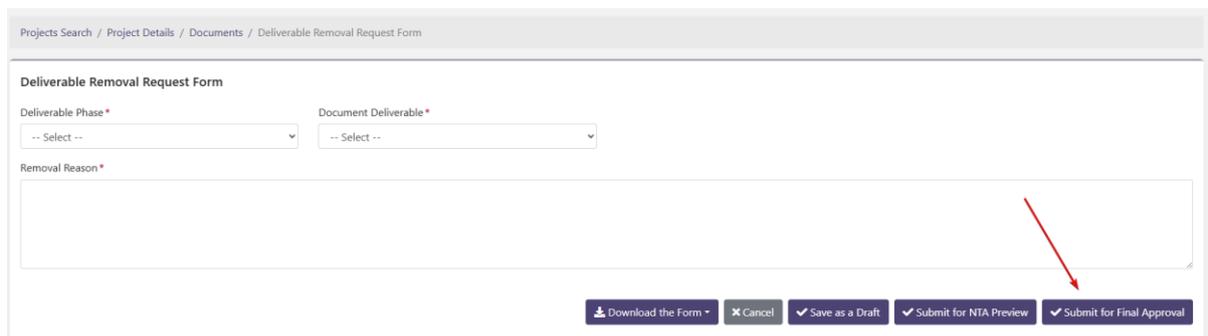
The Deliverable Removal Request form can be downloaded as a PDF or Word document via the “**Download this form**” button.



Note:

- *During the creation process, the PDF option is unavailable as it has not been saved at this point.*
- *The word file can be downloaded as an empty template only.*
- *Once the form is submitted, I can then download the PDF and Word files populated with data.*

The user can submit the form via the **“Submit for Final Approval”** button.



The screenshot shows a web interface for a 'Deliverable Removal Request Form'. At the top, there is a breadcrumb trail: 'Projects Search / Project Details / Documents / Deliverable Removal Request Form'. The form itself has a title 'Deliverable Removal Request Form'. It contains two dropdown menus: 'Deliverable Phase' and 'Document Deliverable', both currently showing '-- Select --'. Below these is a large text area labeled 'Removal Reason'. At the bottom of the form, there is a row of five buttons: 'Download the Form' (with a download icon), 'Cancel' (with an 'X' icon), 'Save as a Draft' (with a checkmark icon), 'Submit for NTA Preview' (with a checkmark icon), and 'Submit for Final Approval' (with a checkmark icon). A red arrow points from the right side of the 'Removal Reason' text area down to the 'Submit for Final Approval' button.

Once the form has been submitted for final approval, the Deliverable Removal Request form status will be updated to “For NTA Approval” for NTA Review.

Users can expand the record to review additional data:

- Submitted By – Shows the email of the user who submitted the form.
- Submission Date – will show the date the form was submitted.
- Removed Document Deliverable - the name of the deliverable being removed.
- Removed Deliverable Phase – Displays the phase the document is removed from.
- Removal Reason – displays the reason for the removal
- Number of Comments not Resolved – displays a count of any unresolved comments.
- Related File(s) – displays any related files which may have accompanied the removal.
- Approval Details – will be populated with any approvers Role – Email – Date Time and comments left on the approval.

196 None Deliverable Removal Request Form Approved

Submitted By
[redacted].com

Submission Date
23/05/2024 10:31

Removed Document Deliverable
CP - Gateway 1 Approval Request Form

Removed Deliverable Phase
Phase 1 - Scope and Purpose

Removal Reason
test

Number of Comments not Resolved
0

Related File(s)
[TAISC-24-0042 - ID 196 - Deliverable Removal Request Form.pdf](#)
[Signature Certificate TAISC-24-0042 - ID 196 - Deliverable Removal Request Form.pdf](#)

[Download All](#)

Approval Details
 NTA Programme Manager - [redacted].com - 23/05/2024 10:33
 NTA Senior Programme Manager - [redacted].com - 23/05/2024 10:44

Once approved, the deliverable will be marked as Removed in the Phase Summary tab. This deliverable will now no longer be required for delivery in this project phase.

Projects Search / Project Details / Phases Summary

← close details panel

Project Details

Project Type
Capital Investment Project

Code
TAISC/24/0019

Name
Micks Gatekeeper Quick

Sponsoring Agency
An Taisce

Project Band
Band 2

Project Phases
Phase 1 - Scope and Purpose

Project Status
Open

Indicative Overall Total Cost of Project
€500,000.00

Estimate Project Completion Year
2024

Start Year
2024

Cost Centre
Accessibility

Claims Payruns Documents **Phases Summary** Multi Annual Project Spend

[Export Grid](#)

Deliverable Phase	Expected	Deferred	Removed	Draft	NTA Preview	For SA Approval	Review Complete	For NTA Approval	Gatekeeper Review	Approval in Progress	Approved	% Complete	Gateway Status
Phase 1 - Scope and Purpose	4	0	0	0	0	0	3	0	0	0	0	100%	In progress
Phase 2 - Concept Development & Option Selection	4	0	0	0	0	1	0	0	0	0	0	0%	In progress
Phase 3 - Preliminary Design	3	0	1	0	0	0	0	1	0	0	0	0%	In progress

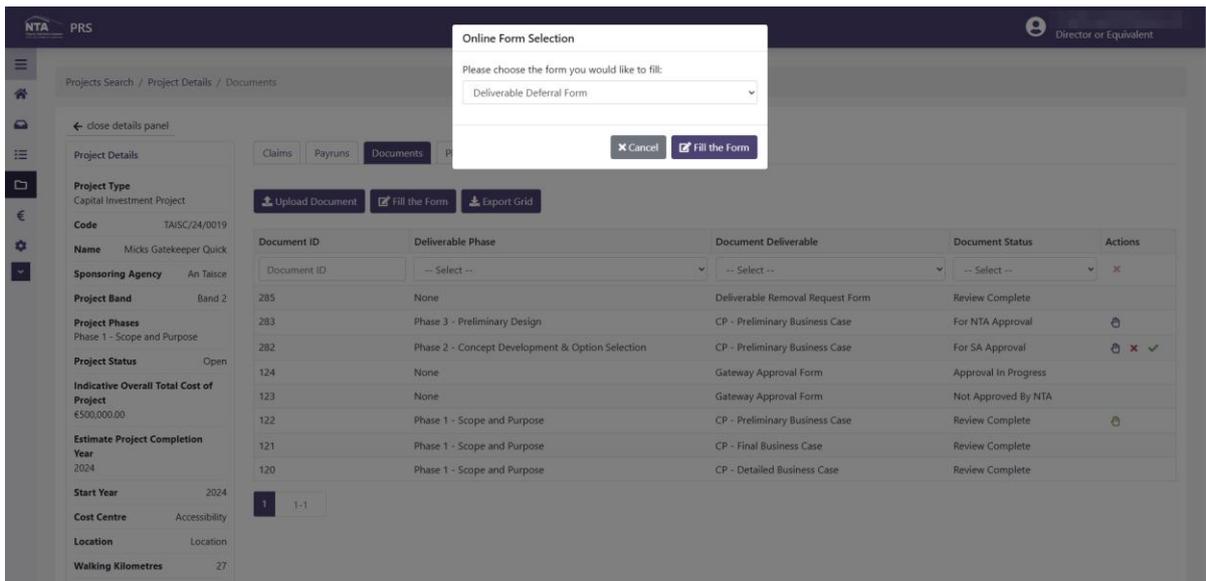
Document Deliverable	Deliverable Status	Mandatory?	Expected Delivery Date	Actions
CP - Detailed Business Case	Removed	Yes	-	
CP - Final Business Case	-	Yes	-	
CP - Gateway 1 Approval Request Form	-	No	-	
CP - Preliminary Business Case	For NTA Approval	Yes	-	

Note:

A Deliverable Removal Request form cannot be submitted against a document deliverable which is already in 'Approved' or 'Review Complete' status.

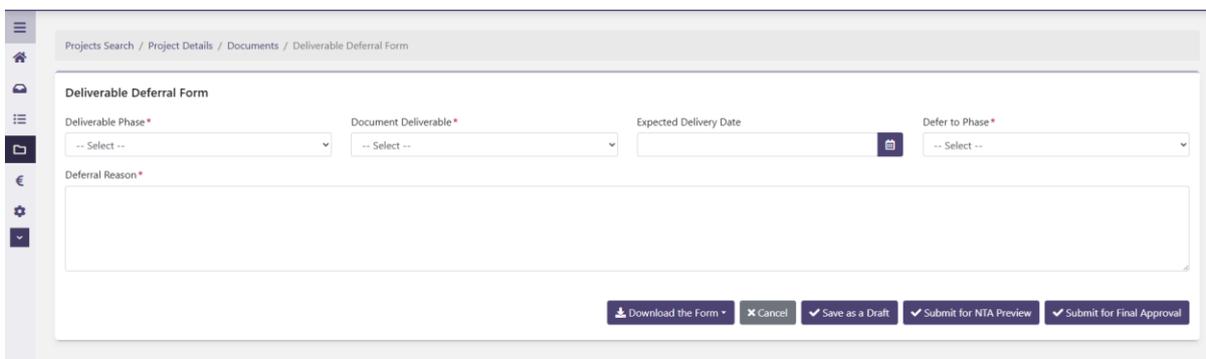
DELIVERABLE DEFERRAL FORM

To submit a Deliverable Deferral form, the user will select the option from the dropdown and click on "Fill the Form" button to open the Deferral Request form.



On the Deliverable Deferral Form, the user can see the below fields:

- **Deliverable Phase** - displays a list of deliverable phases from the projects selected schema.
- **Document Deliverable** - will display all document deliverables which are expected for delivery based on the selected Deliverable Phase selection.
- **Expected Delivery Date** - Date picker to set the new expected delivery date.
- **Defer to Phase** – displays a list of deliverable phases to determine where the document is to be deferred to.
- **Deferral Reason** – Text field for providing a deferral reason.



Once the form has been submitted, the Deliverable Deferral form status will be updated to “For NTA Approval” for NTA Review.

Users can expand the record to review additional data:

- Submitted By – Shows the email of the user who submitted the form.
- Submission Date – will show the date the form was submitted.
- Deferred Document Deliverable – the name of the deliverable being deferred
- Original Deliverable Phase - Displays the phase the deliverable will be deferred from.

- **Defer To Phase** – displays the phase the deliverable will be deferred to
- **Deferral Reason** – displays the reason for the deferral
- **Number of Comments not Resolved** – displays a count of any unresolved comments.
- **Related File(s)** – displays any related files which may have accompanied the deferral.
- **Approval Details** – will be populated with any approvers Role – Email – Date Time and comments left on the approval.

674 TAISC/24/0123 Demo project Capital Investment Project Band 1 None Deliverable Deferral Form Approved

Submitted By
@gmail.com

Submission Date
05/11/2025 08:49

Deferred Document Deliverable
CP - Gateway 1 Approval Request Form

Original Deliverable Phase
Phase 2 - Concept Development & Option Selection

Defer To Phase
Phase 4 - Statutory Process

Deferral Reason
gf

Number of Comments not Resolved
0

Related File(s)
[TAISC-24-0123 - ID 674 - Deliverable Deferral Form.pdf](#)
[Signature Certificate TAISC-24-0123 - ID 674 - Deliverable Deferral Form.pdf](#)
[Download All](#)

Approval Details
 NTA Programme Manager - .com - 05/11/2025 08:53 - d
 NTA Senior Programme Manager - .com - 05/11/2025 08:54 - f

Once approved, the deliverable will be marked as 'Deferred' in the Phase Summary tab.

Claims Payruns Documents **Phases Summary** Multi Annual Project Spend [Export Grid](#)

Deliverable Phase	Expected	Deferred	Removed	Draft	NTA Preview	For SA Approval	Review Complete	For NTA Approval	Gatekeeper Review	Approval in Progress	Approved	% Complete	Gateway Status
Phase 1 - Scope and Purpose	1	0	0	0	0	0	1	0	0	0	0	100%	In progress
Phase 2 - Concept Development & Option Selection	1	2	1	0	0	0	1	0	0	0	0	100%	In progress

Document Deliverable	Deliverable Status	Mandatory?	Expected Delivery Date	Actions
CP - Gateway 2 Approval Request Form	Removed	Yes	-	
Feasibility Report	Deferred	Yes	-	
Project Execution Plan	Deferred	Yes	-	
Option Selection Report	Review Complete	Yes	-	

This deliverable will now no longer be required for delivery in its original Phase and the document deliverable will be added to the '**Defer to Phase**' specified in the form.

Deliverable Phase	Expected	Deferred	Removed	NTA Preview	For SA Approval	Review Complete	For NTA Approval	Gatekeeper Review	Approval in Progress	Approved	% Complete	Gateway Status
Phase 1 - Scope and Purpose	2	0	1	0	0	0	0	0	0	0	0%	In progress
Phase 2 - Concept Development & Option Selection	3	1	0	0	0	0	0	0	0	0	0%	In progress
Phase 3 - Preliminary Design	2	0	0	0	0	0	0	0	0	0	0%	Not Started
Phase 4 - Statutory Process	4	0	0	0	0	0	0	0	0	0	0%	Not Started

Document Deliverable	Deliverable Status	Mandatory?				Expected Delivery Date	Actions
Final documentation for planning/statutory consent	-	Yes				-	
Planning Outcome Report	-	Yes				-	
CP - Gateway 4 Approval Request Form	-	Yes				-	
CP - Gateway 2 Approval Request Form	-	Yes				31/05/2024	

Note:

A Deliverable Deferral form cannot be submitted against a document deliverable which is already in ‘Approved’ or ‘Review Complete’ status.

I also cannot defer a document from one phase to another phase where the same document deliverable exists in both phases.

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
- Deliverable Deferral Form
- Deliverable Removal Request Form

Online Form Selection

Please choose the form you would like to fill:

-- Select --

- Allocation Adjustment Form
- Grant Application Form
- Project Funding Continuance Form
- Deliverable Removal Request Form
- Deliverable Deferral Form

Note: The Project Funding Continuance Form may not be available for selection if any of the below is true:

- Project is in Draft Status
- An existing Project Funding Continuance Form exists in one of the below statuses:
 - Draft
 - NTA Preview
 - For SA Approval
 - For NTA Approval
 - Approval in Progress

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

Online Form Selection

Please choose the form you would like to fill:

Project Funding Continuance Form ▼

The NTA 'Project Funding Continuance Form' should be used for all existing projects seeking a new allocation for the current calendar year.

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

Online Form Selection

Please choose the form you would like to fill:

Project Funding Continuance Form ▼

The NTA 'Project Funding Continuance Form' should be used for all existing projects seeking a new allocation for the current calendar year.

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

Projects Search / Project Details / Documents / Project Funding Continuance Form

Project Funding Continuance Form

Section 1 - Current Costs

Cumulative grant funding paid to date (€ EUR)	Funding requested for current year (€ EUR)*	Self-funded amount (information only) (€ EUR)
€ 0.00	€ X.XX	€ X.XX

[Back](#)
[Download the Form](#)
[Cancel](#)
[Save as a Draft](#)
[Submit for NTA Preview](#)
[Submit for Final Approval](#)
[Next](#)

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. Field is blocked if in current year the allocation on related project was already updated and is not set to 0.
- 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]

Projects Search / Project Details / Documents / Project Funding Continuance Form

Project Funding Continuance Form

Section 1 - Current Costs

Cumulative grant funding paid to date (€ EUR)	Funding requested for current year (€ EUR)*	Self-funded amount (information only) (€ EUR)
€ 0.00	€ X.XX	€ X.XX

[Back](#)
[Download the Form](#)
[Cancel](#)
[Save as a Draft](#)
[Submit for NTA Preview](#)
[Submit for Final Approval](#)
[Next](#)

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

- 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)

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

Note: The Allocation Adjustment form may not be available for selection if any of the below is true:

- Project is in Draft Status
- An existing Allocation adjustment form exists in one of the below statuses:
 - Draft
 - NTA Preview
 - For SA Approval
 - For NTA Approval
 - Approval in Progress
- An Allocation has already been made on the project for the current year

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:

In Current Project Details section:

- Existing Allocation - showing non editable value with Current Year Allocation saved on the project at the moment of filling the form
- Paid This Year - showing Paid This Year value visible on the project dashboard. This information wasn't visible on this form previously.
- Submitted - showing Submitted value visible on the project dashboard. This information wasn't visible on this form previously.
- Awaiting Payment - showing Awaiting Payment value visible on the project dashboard. This information wasn't visible on this form previously.

In Adjustment Values section:

- Adjustment Value (€ EUR) - mandatory free text field. Currency in this field is euro by default. Field is restricted to 16 characters. It does not accept A-Z characters and special characters other than full stop '!'. Field does not approve 0 amount. Negative values are allowed, however New Allocation cannot be lower than sum of amounts on all claims related with this project that are in For Payment Approval, Payment Approved and Paid statuses in current year.
- New Allocation (€ EUR) - field will calculate the value based on the Existing Allocation + Adjustment Value.
- Reason - mandatory free text field. Field is mandatory and restricted to 2000 characters
- Please upload supporting documentation where relevant for this section' file upload area. I am able to upload multiple files in *.msg, *.xls, *.xlsx, *.pdf, *.doc, *.docx, *.txt, *.jpg, *.png, *.dwg and *.bmp formats. I am able to upload single attachment with maximum size of 40MB.

Allocation Adjustment Form

Current Project Details

Existing Allocation (€ EUR)	Paid This Year (€ EUR)	Submitted (€ EUR)	Awaiting Payment (€ EUR)
€30,000.00	€1,000.00	€0.00	€500.00

Adjustment Values

Adjustment Value (€ EUR) * New Allocation (€ EUR) €30,000.00

Reason *

Please upload supporting documentation

Drag & Drop file here or [Browse](#)

Download the Form * Cancel Save as a Draft Submit for NTA Preview

PHASE SUMMARY

The Phase Summary tab can be selected to view a summary of document deliverables expected for the project and to view the status of which document deliverables have been delivered and are yet to be delivered for a project phase.

Project Details

Project Type: Capital Investment Project

Code: TAISC/24/0019

Name: Micks Gatekeeper Quick

Sponsoring Agency: An Taisce

Project Band: Band 2

Project Phases: Phase 1 - Scope and Purpose

Project Status: Open

Indicative Overall Total Cost of Project: €500,000.00

Estimate Project Completion Year: 2024

Start Year: 2024

Cost Centre: Accessibility

Location: Location

Walking Kilometres: 27

Cycling Kilometres: 27

Phases Summary

Deliverable Phase	Expected	Deferred	Removed	Draft	NTA Preview	For SA Approval	Review Complete	For NTA Approval	Gatekeeper Review	Approval in Progress	Approved	% Complete	Gateway Status
Phase 1 - Scope and Purpose	4	0	0	0	0	0	3	0	0	0	0	100%	In progress
Phase 2 - Concept Development & Option Selection	4	0	0	0	0	1	0	0	0	0	0	0%	In progress
Phase 3 - Preliminary Design	3	0	1	0	1	0	0	1	0	0	0	0%	In progress
Phase 4 - Statutory Process	4	0	0	0	0	0	0	0	0	0	0	0%	Not Started
Phase 5 - Detailed Design & Procurement	4	0	0	0	0	0	0	0	0	0	0	0%	Not Started
Phase 6 - Construction & Implementation	4	0	0	0	0	0	0	0	0	0	0	0%	Not Started
Phase 7 - Close-out & Review	4	0	0	0	0	0	0	0	0	0	0	0%	Not Started

The below column headers are available to the user:

- **Deliverable phase** -
- **Expected** - displays a count of the number of mandatory documents needed to complete that phase.

- **Deferred** - displays a count of deliverables which have been deferred for that phase.
- **Removed** - displays a count of deliverables which have removed for that phase.
- **Draft** - displays a count of deliverables in this status
- **NTA Preview** - displays a count of deliverables in this status.
- **For SA Approval** - displays a count of deliverables in this status.
- **Review Complete** - displays a count of deliverables in this status.
- **For NTA Approval** - displays a count of deliverables in this status.
- **Gatekeeper Review** - displays a count of deliverables in this status.
- **Approval in Progress** - displays a count of deliverables in this status.
- **Approved** - displays a count of deliverables in this status.
- **% Complete** - This is the percentage of mandatory deliverables for the phase which are in Approved or Review complete status.
- **Gateway Status** - will be 1 of the below values:
 - **Not Started** – when no documents for given phase and gateway were created.
 - **In Progress** – when there are documents created for given phase and gateway.
 - **Completed** – when all Recommended deliverables were submitted and approved and when Gateway Approval Form is in ‘Approved’ status.

The user can click on a Deliverable phase record and expand this to see a breakdown of document deliverables for that phase.

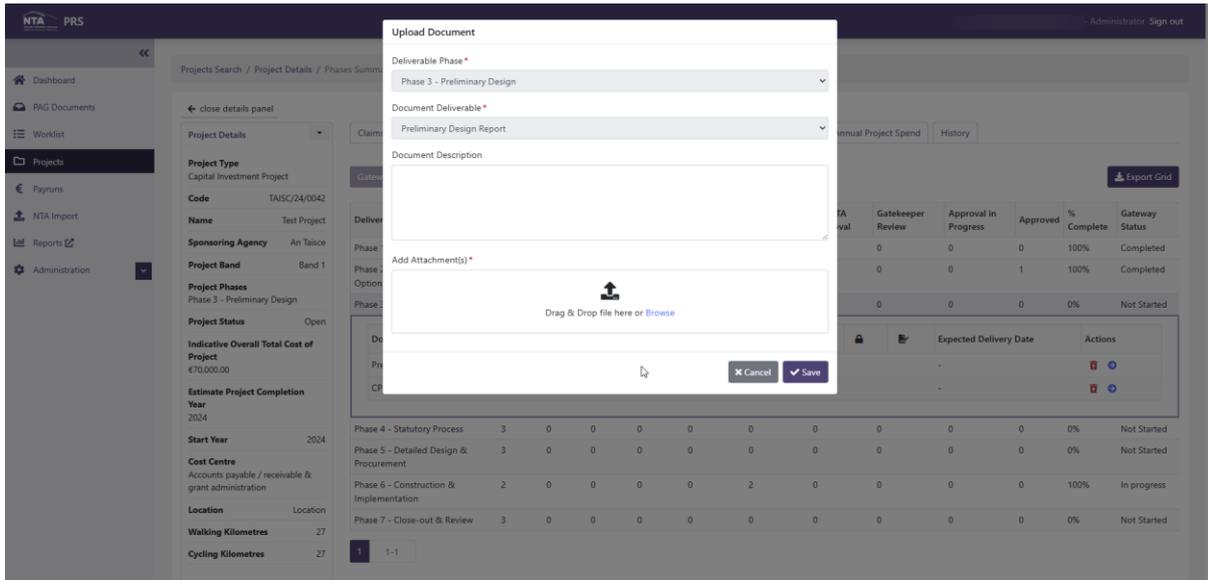
Deliverable Phase	Expected	Deferred	Removed	NTA Preview	For SA Approval	Review Complete	For NTA Approval	Gatekeeper Review	Approval in Progress	Approved	% Complete	Gateway Status
Phase 1 - Scope and Purpose	2	0	1	1	0	0	0	0	0	0	0%	In progress

Document Deliverable	Deliverable Status	Mandatory?				Expected Delivery Date	Actions
CP - Gateway 1 Approval Request Form	Removed	Yes				-	
Feasibility Report	-	Yes				-	
Project Execution Plan	NTA Preview	No				-	

The expanded record will have a list of Document deliverables with the below information for each deliverable:

- **Document Deliverable** - Name of the document.
- **Deliverable Status** – Current document status.
- **Mandatory?** – If the document is mandatory it is required to complete the phase
- **Hold Point** 🖐️ - if the document has a hand icon, it requires a hold point release from the gatekeeper.
- **Confidential** 🔒 - if the document has a lock icon, it is considered confidential and only nominated NTA Programme Manager, NTA Section Head or NTA Senior Project Manager can work on this document.
- **SA Director Signature Required** ✍️ - If the document has a signature icon, it will require a signature from the SA Director or Equivalent user assigned to the project.
- **Expected Delivery Date** – displays the expected delivery date for the document.
- **Actions** – one or more of the below action icons may be displayed:
 - **Request Removal** 🗑️ - User can click this icon to request removal of the document deliverable from this phase.
 - **Request Deferral** ⏸️ - User can click this icon to request deferral of the document deliverable from one project phase to another project phase.
 - **Hold Point** 🖐️ - This will be visible if the document requires a hold point to be released and can be 1 of 3 colours. Only the nominated gatekeeper can click this icon to release a hold point.
 - **If the Hand icon is Green** 🟢 - The hold point has been reviewed and released by the gatekeeper
 - **If the Hand icon is Red** 🟡 - The hold point has been reviewed and not released by the gatekeeper
 - **If the Hand icon is purple** 🟣 - The hold point has not been actioned by the gatekeeper.
 -
 - **Reject** ❌ - User can reject a document.
 - **Approve** ✅ - User can approve a document.

The user can double click on any document deliverable record to upload a document against that deliverable. The Deliverable Phase and Document Deliverable will be auto populated and locked from editing.



GATEWAY APPROVAL FORM

Once a Deliverable Phase '% complete' is 100% and all documents with hold points for a phase have been released. The assigned NTA Programme Manager, NTA Senior Programme Manager or NTA Section Head will submit a gateway approval form. This form is created and reviewed by the NTA team and once approved, the Gateway status is updated from In progress to Completed.

Projects Search / Project Details / Phases Summary

← close details panel

Project Details

Project Type: Capital Investment Project

Code: TAISC/24/0042

Name: Test Project

Sponsoring Agency: An Taisce

Project Band: Band 1

Project Phases: Phase 3 - Preliminary Design

Project Status: Open

Indicative Overall Total Cost of Project: €70,000.00

Deliverable Phase	Expected	Deferred	Removed	Draft	NTA Review	For SA Approval	Review Complete	For NTA Approval	Gatekeeper Review	Approval in Progress	Approved	% Complete	Gateway Status
Phase 1 - Scope and Purpose	1	0	1	0	0	0	1	0	0	0	0	100%	Completed
Phase 2 - Concept Development & Option Selection	3	1	0	0	0	0	2	0	0	0	1	100%	Completed
Phase 3 - Preliminary Design	2	0	0	0	0	0	0	2	0	0	0	0%	In progress
Phase 4 - Statutory Process	3	0	0	0	0	0	0	3	0	0	0	0%	In progress

During the Gateway Approval process, sponsoring agency users can view the Gateway Approval form from PAG Documents or the project documents tab once it is created by selecting the 🔍 icon on the Gateway Approval form.

The screenshot displays a project management interface. On the left is a navigation sidebar with 'Worklist', 'Projects', 'Payruns', and 'Administration'. The main area is divided into 'Project Details' on the left and a document list on the right. The document list has columns for Document ID, Deliverable Phase, Document Deliverable, Document Status, and Actions. The document with ID 124 is highlighted, and its details are shown below. A red box highlights the document name 'Gateway Approval Form' in the list, and a red arrow points to a search icon in the details view.

Document ID	Deliverable Phase	Document Deliverable	Document Status	Actions
288	Phase 1 - Scope and Purpose	CP - Gateway 1 Approval Request Form	Review Complete	
287	Phase 3 - Preliminary Design	CP - Final Business Case	NTA Preview	✗ ✓
285	None	Deliverable Removal Request Form	Review Complete	
283	Phase 3 - Preliminary Design	CP - Preliminary Business Case	For NTA Approval	
282	Phase 2 - Concept Development & Option Selection	CP - Preliminary Business Case	For SA Approval	
124	None	Gateway Approval Form	Approval In Progress	

Submitted By
testb@openskydata.com

Submission Date
09/05/2024 08:48

Related File(s)
TAISC-24-0019 - ID 124 - Gateway Approval Form.pdf

Document Description
-

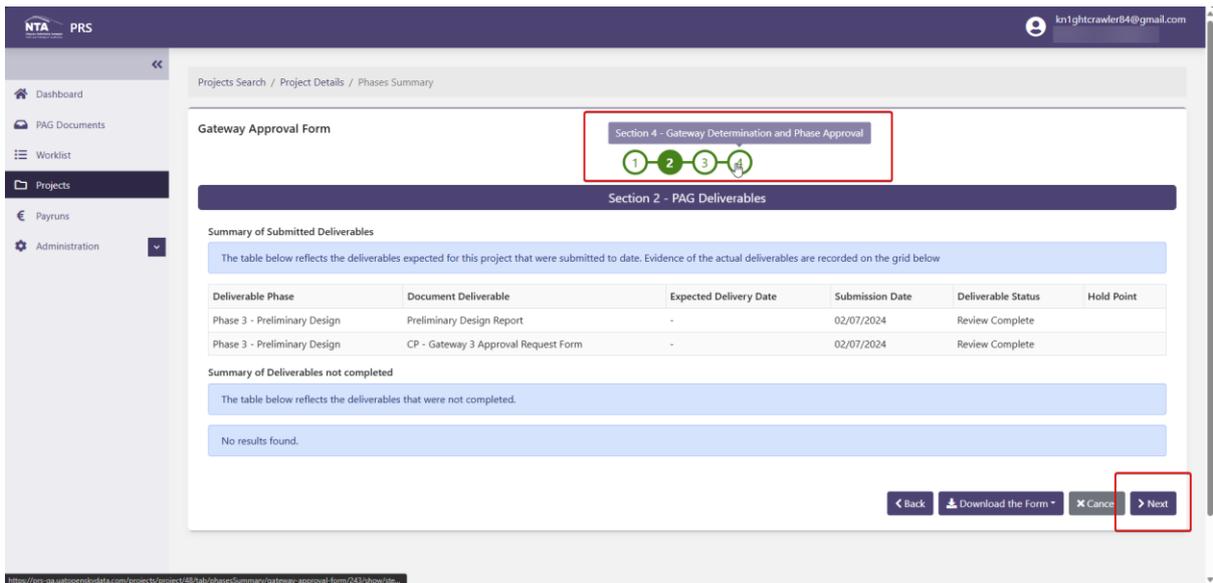
Number of Comments not Resolved
0

Approval Details

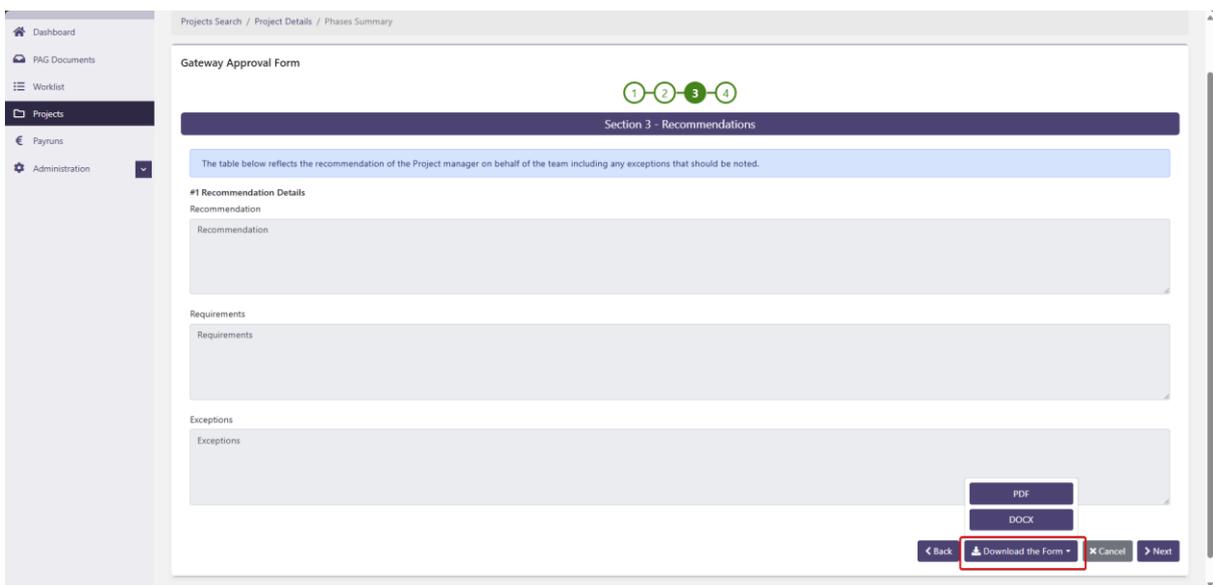
The form will be in a read only state and cannot be edited by external users.

The screenshot shows the 'Gateway Approval Form' interface. At the top, there is a progress indicator with four numbered steps (1, 2, 3, 4). Below this is a section titled 'Section 1 - Project Overview and Background'. The form contains several fields: Project Name (TAISC/24/0041 - CAP Gateway), Project Band (Band 1), Project Phase (Phase 3 - Preliminary Design), Sponsoring Agency / Directorate (An Taisce), and Project Description (Testing). There are also fields for Project Manager and Nominated Gatekeeper Approver. At the bottom right, there are navigation buttons: '< Back', 'Download the Form', 'Cancel', and '> Next'.

Users can navigate the form by clicking on the Next button or using the numbers on top of the form to quickly jump to a specific section of the form.



The form can also be downloaded in Microsoft Word or PDF format using the “Download the Form button”



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.

← close details panel

Project Details

Project Type
Capital Investment Project

Code CL/19/0001

Name withdrawal

Sponsoring Agency
Clare County Council

Project Band TestBand

Project Phases N/A

Project Status Open

Indicative Overall Total Cost of Project
€6,666.48

Estimate Project Completion
Year 2035

Start Year 2019

Cost Centre BusConnects Fleet

Location -

Walking Kilometres -

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

Export Grid

Year	Allocations as at Year End	Year End Spend	Balance
2019	€822,040.88	€0.00	€822,040.88
2020	€6,588,647.00	€3,129.22	€6,585,517.78
2021	€1,249,646.00	€3,747.83	€1,245,898.17
2022	€0.00	€0.00	€0.00
Total		€6,877.05	

1 1-1

8. 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

Payruns

Payrun Number

Project Code

Project Name

Claim Reference Number

Date Paid - From 

Date Paid - To 

Navigation menu: PAG Documents, Worklist, Projects, **Payruns**, Administration



Projects Search / Project Details / Payruns

← close details panel

Project Details

Project Type ICT Project

Code DB/23/0031

Name Allocation 16/1/23

Sponsoring Agency Dublin Bus

Project Band Band 1

Project Phases Phase 0: Initiated

Project Status Open

Indicative Overall Total Cost of Project €0.00

Estimate Project Completion Year -

Start Year 2023

Cost Centre Accessibility

Location -

Walking Kilometres -

Cycling Kilometres -

Claims Payruns Multi Annual Project Spend

Export Grid

Payrun Number	Paid Date	Claim Reference Number	Total Paid	Actions
<input type="text" value="Payrun Number"/>	<input type="text" value=""/>	<input type="text" value="Claim Reference Number"/>		<input type="button" value="✖"/>
26	18/01/2023 16:12	188	€500.00	<input type="button" value="⋮"/>
24	16/01/2023 19:40	189	€1,500.00	<input type="button" value="⋮"/>
22	16/01/2023 16:56	185, 186, 187	€95,000.00	<input type="button" value="⋮"/>

1 1-1

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.

Payruns

Payruns

Payrun Number

Project Code

Project Name

Claim Reference Number

Date Paid - From

Date Paid - To

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.

Payruns

Payrun Number Project Code Project Name Claim Reference Number

Date Paid - From Date Paid - To

Results

Payrun Number	Paid Date	Claim Reference Number	Total Paid	Actions
3	02/06/2021	39, 40, 41, 42, 43, 44, 45, 46	€4,697.41	
2	02/06/2020	1, 2, 3, 4, 5, 6	€2,911.82	

1 1-1

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

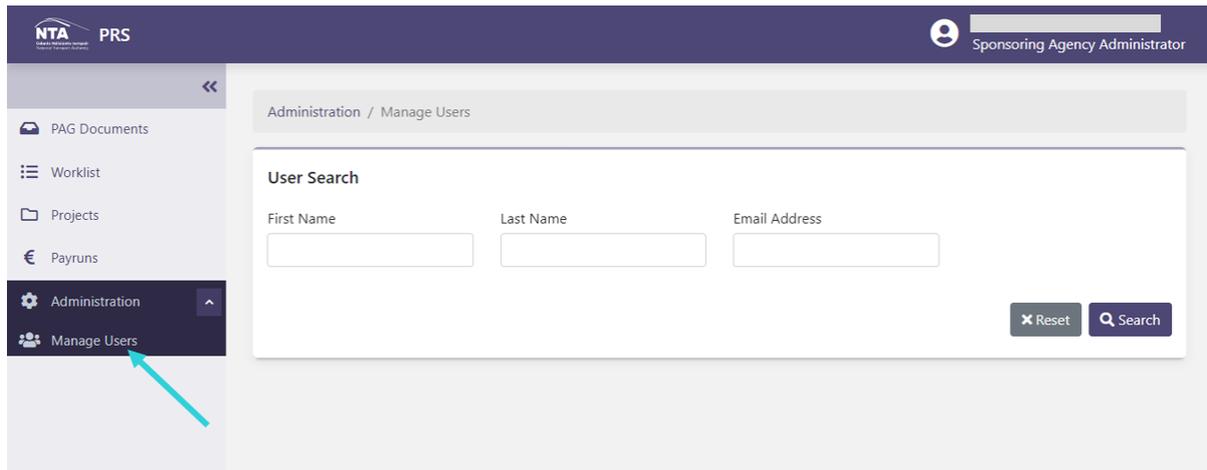
Payrun Claims

Claims Reference Number	Project Code	Project Name	Programme	Creation Date	Approved By	Approval Date	Total
39	TAISC/19/0001	Jewellery & Books	B8.5 WALKING & CYCLING PROGRAMME	02/06/2021 20:22	seed@seed.com	02/06/2021 20:22	€251.
40	TAISC/19/0001	Jewellery & Books	B8.5 WALKING & CYCLING PROGRAMME	02/06/2021 20:22	seed@seed.com	02/06/2021 20:22	€149.
41	TAISC/19/0001	Jewellery & Books	B8.5 WALKING & CYCLING PROGRAMME	02/06/2021 20:22	seed@seed.com	02/06/2021 20:22	€647.
42	TAISC/19/0001	Jewellery & Books	B8.5 WALKING & CYCLING	02/06/2021 20:22	seed@seed.com	02/06/2021 20:22	€803.

14. ADMINISTRATION

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

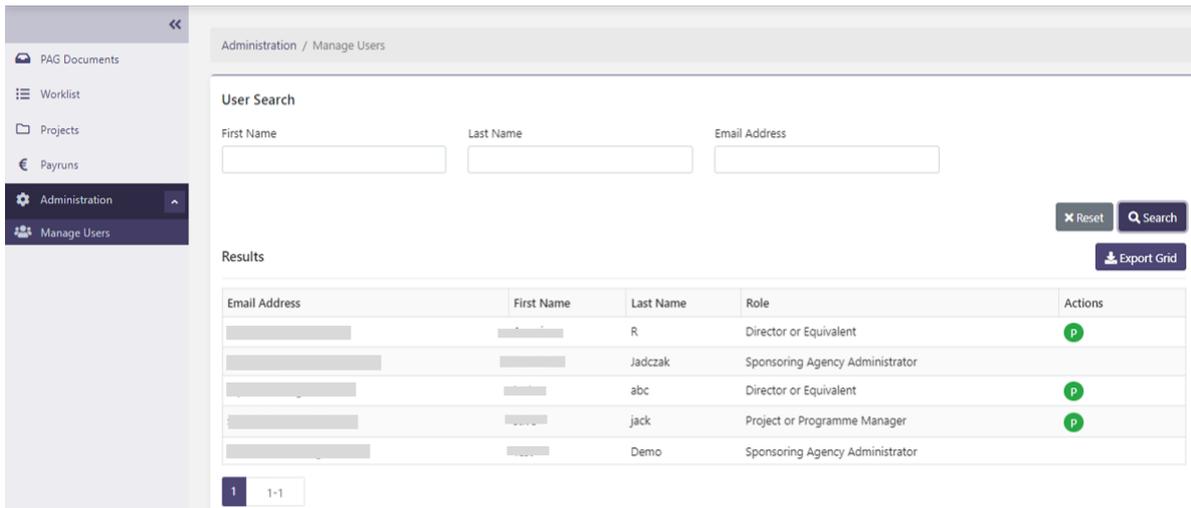
Once the desired search criteria are set the user has 2 options:

- 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.

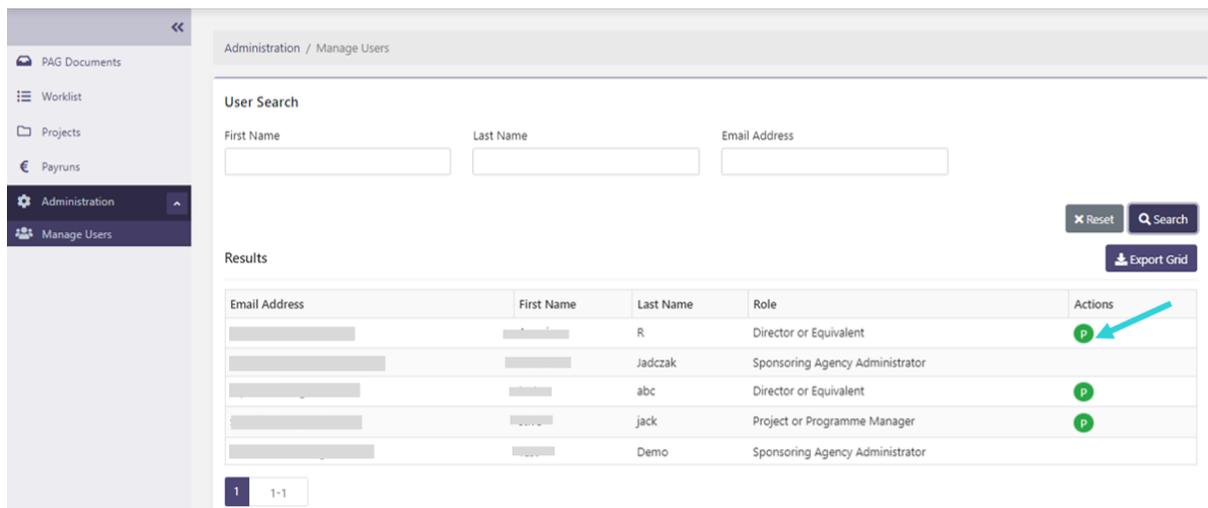
The grid will give an overview of all relevant details for the users with following details:

- 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**.

Project Code & Name	Programme	Sub-Programme	Project Management	Remove Access	Select for Re-Assignment
BE/19/0012 / Planner	B8.2 HEAVY RAIL SAFETY & DEVELOPMENT	Heavy Rail	-		-
CL/19/0001 / withdrawal	B8.1 SUSTAINABLE URBAN TRANSPORT	Regional / Cities	-		-
CN/19/0001 / wireless	B8.3 PUBLIC TRANSPORT INFRASTRUCTURE	Integration and Support	-		-
DB/22/0012 / test edit	B8.2 HEAVY RAIL SAFETY & DEVELOPMENT	Heavy Rail	-		-
DB/22/0013 / test	B8.2 HEAVY RAIL SAFETY & DEVELOPMENT	Heavy Rail	-		-
DB/22/0015 / demo	B8.2 HEAVY RAIL SAFETY & DEVELOPMENT	Heavy Rail	Director or Equivalent		<input type="checkbox"/>
DB/22/0018 / Demo1	B8.2 HEAVY RAIL SAFETY & DEVELOPMENT	Heavy Rail	Director or Equivalent		<input type="checkbox"/>

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

Project Management Re-Assignment

Select projects below that you wish to re-assign and use 'Re-Assign to other User' search field to search for new system user. Remember that only users with the same permission level will be listed.

Re-Assign to other User

✓ Re-Assign

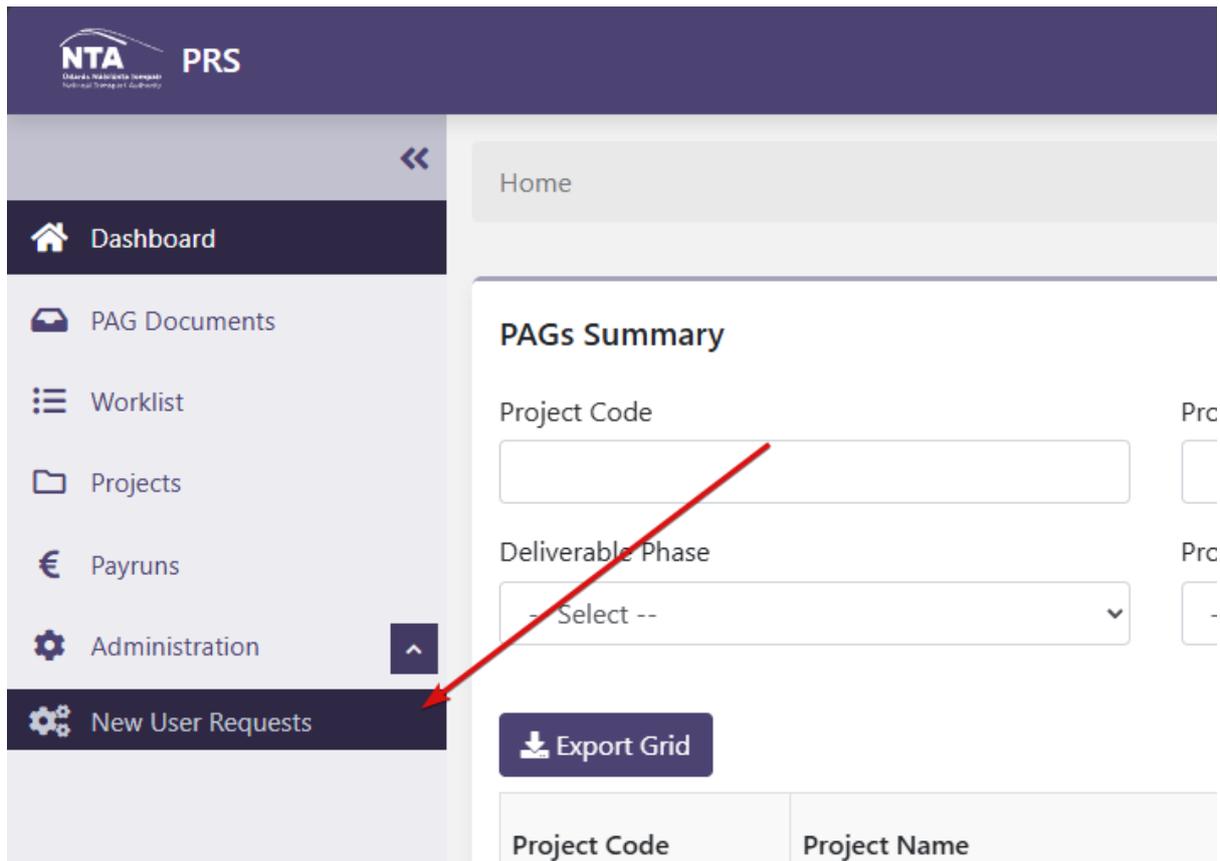
Projects

Project Code & Name	Programme	Sub-Pogramme	Project Management	Remove Access	Select for Re-Assignment
DB/22/0013 / test	B8.2 HEAVY RAIL SAFETY & DEVELOPMENT	Heavy Rail	Director or Equivalent		<input checked="" type="checkbox"/>

- 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

NEW USER REQUESTS

All external user roles can access New User Requests in administration. This can be used to submit a request for a new user to be added to the system. Once Approved by the NTA team, the user being added will receive an email to reset password. The user will also be added to Manage External Users as a new user.



DOCUMENTS FILTERING

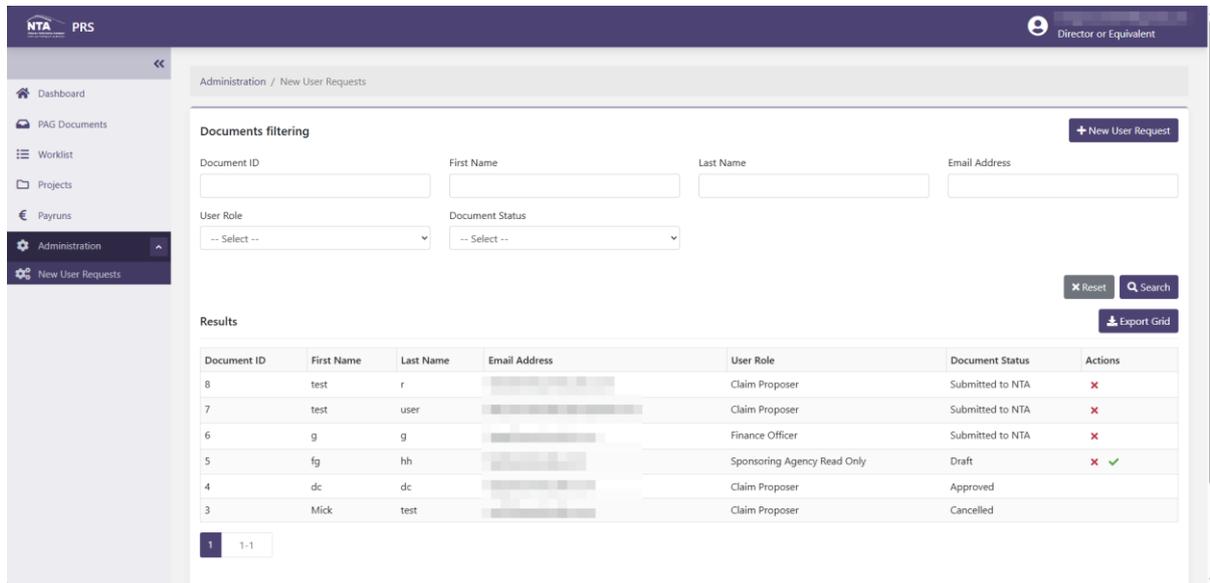
After choosing the **'New User Requests'** from Administration section, system will show a screen with following tabs:

- Document ID
- First Name
- Last Name
- Email Address
- User Role
- Document Status
- Reset
- Search
- Export Grid (when search is performed)
- New User Request

When a search is performed results will be returned with the following fields:

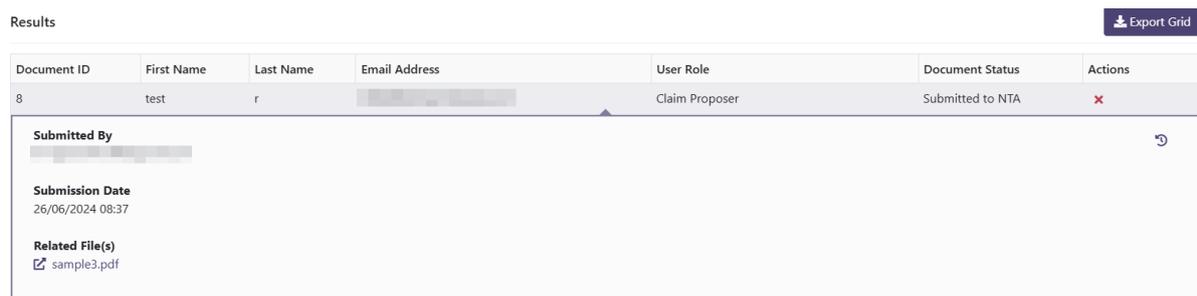
- Document ID
- First Name
- Last Name

- Email Address
- User Role
- Document Status
- Actions
 - Approve
 - Reject



If a result is selected, then this will expand the record with the following data:

- Submitted By
- Submission Date
- Related File(s)
- History icon



If the “History Icon” is selected, this will open the “Document History” pop-up with the following fields will display:

- Change Type
- Change Date
- Created By
- Actions
 - Show Details button

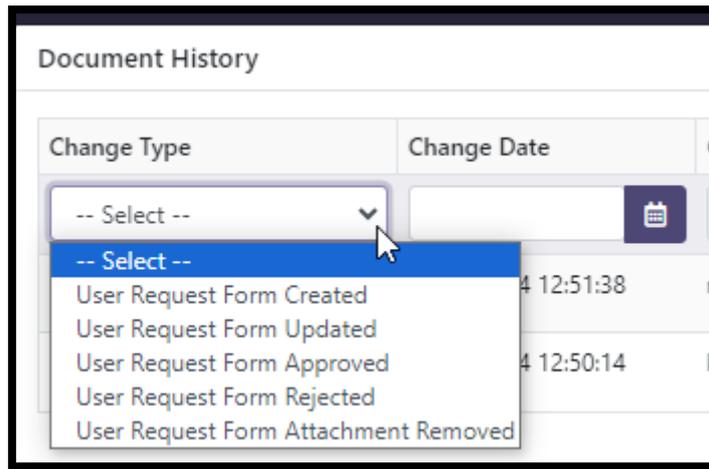
- Close button

Document History

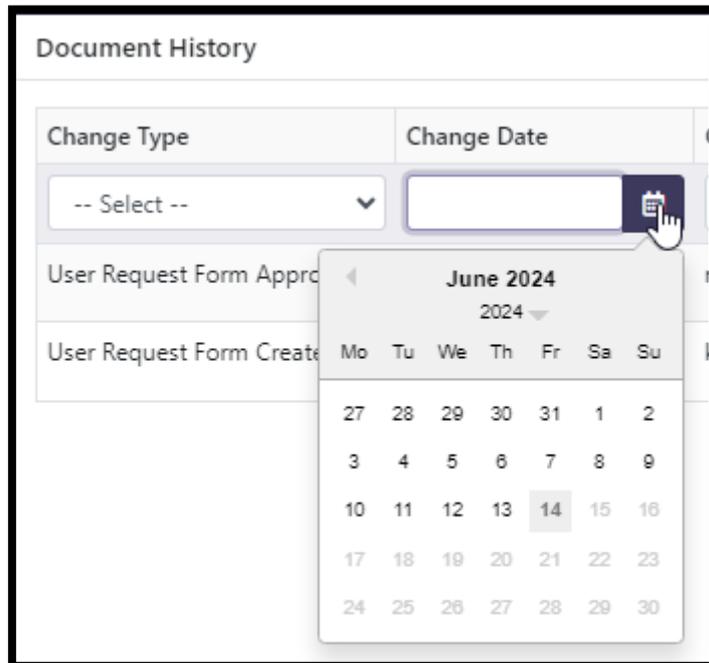
Change Type	Change Date	Created By	Actions
-- Select --	<input type="text"/>	Created By	<input type="text"/>
User Request Form Created	26/06/2024 08:37:22	<input type="text"/>	<input type="text"/>

The Change Type dropdown when selected will display the following options to filter by:

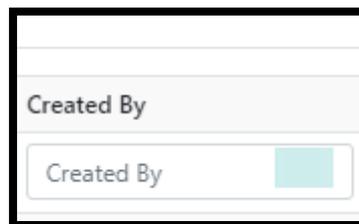
- User Request Form Created
- User Request Form Updated
- User Request Form Approved
- User Request Form Rejected
- User Request Form Attachment Removed



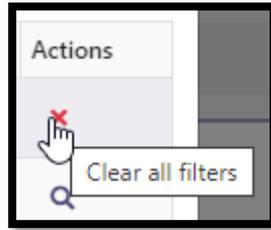
The Change Date filter will allow user to search by date it was changed:



The Created By will allow user to search by the user that made the changes:



The Actions column will have an option to allow user to clear the filters:



ADD NEW USER REQUEST

To add a new user request select the +New User Request button in the top right corner of the screen

The screenshot shows the 'Administration / New User Requests' page. The 'Documents filtering' section includes input fields for Document ID, First Name, Last Name, and Email Address, along with dropdown menus for User Role and Document Status. A '+ New User Request' button is highlighted with a red box and a red arrow. Below the filtering section is a table of results with columns for Document ID, First Name, Last Name, Email Address, User Role, Document Status, and Actions. The table contains six rows of data. At the bottom of the table, there is a pagination control showing '1' of '1-1' items.

The system will show me a screen with following fields:

- **Email Address** - text field. E-mail address must be unique. Field is mandatory. Once user is saved, this field is no longer editable. The field accepts only whitelisted email domains.
- **First Name** - text field where I can input a new first name.
- **Last Name** - text field where I can input a new last name.
- **Contact Number** - text field. It allows a user to input only 0-9 digits, space, and hyphen '-'.
- **Job Title** – text field. Field is restricted to 100 characters.
- **Role** – mandatory drop-down with the below roles listed
 - Claim Proposer
 - Finance Officer
 - Project or Programme Manager
 - Director or Equivalent
 - Sponsoring Agency Administrator

- Sponsoring Agency Read Only

‘Please print the filled new user request form, provide sign-off from a senior official within the Sponsoring Agency for example; Chief Executive, Chief Financial Officer, or Director of Operations and upload it as supporting documentation.

file upload area. I am able to upload multiple files in *.msg, *.xls, *.xlsx, *.pdf, *.doc, *.docx, *.txt, *.jpg, *.png, *.dwg and *.bmp formats. A file is required to submit a new user request

Below this, I can see a description of each user role.

Role	Description
Claim Proposer (uploader)	This user role is responsible for: Creating claims on specific projects and submitting them for Finance Officer/Director or Equivalent review
Finance Officer (approver)	This user role is responsible for: <ul style="list-style-type: none"> • Approving Claims to be processed by NTA • Rejecting Claims back to Claim Proposer/Project or Programme Manager for revision <p>The Finance Officer should be a senior official within a Sponsoring Agency.</p>
Project or Programme Manager	Role with the responsibility for organising, planning, overseeing and executing projects within the sponsoring agency. Project or Programme Manager will only see projects assigned to them. This role also has the ability to: Create claims on specific projects and submit them for Finance Officer/Director or Equivalent review.
Director or Equivalent	Role with authority or delegated authority for final sign off documents on the sponsoring agency's behalf. Director or Equivalent role will have visibility of the projects which they have been assigned. This role also has the ability to: <ul style="list-style-type: none"> • Approve Claims to be processed by NTA • Reject Claims back to Claim Proposer/Project or Programme Manager for revision
Sponsoring Agency Administrator	Role with expanded system administrative capabilities within the sponsoring agency; including, for example, the reassignment of Project or Programme manager for form approvals. Sponsoring Agency Administrator will have access to all functionalities (with the exception of forms approval and providing signatures and claim approval) in the PRS External Module and visibility of all projects. SA Administrator should have the same permission level to Claims and Payruns as Claim Proposer.

Download the Form Cancel Save as a Draft Save & Submit

Once all required information has been added, the user will click “Save & Submit” to be reviewed by the NTA team. The request will be visible in the results and updated to “Submitted to NTA” status.

After review, the status will be updated to:

- **Approved** - if accepted, the user will be automatically added to the system and the user being added will receive an email with instructions to setup their password for PRS.
- **Rejected** – If the request is rejected, the status will be updated to “Rejected” and a new request must be submitted again if necessary.

NTA PRS Director or Equivalent

Administration / New User Requests

Documents filtering + New User Request

Document ID: First Name: Last Name: Email Address:

User Role: -- Select -- Document Status: -- Select --

Results

Document ID	First Name	Last Name	Email Address	User Role	Document Status	Actions
9	mark	mooney	[REDACTED]	Claim Proposer	Submitted to NTA	<input type="button" value="x"/>
<div style="border: 1px solid #ccc; padding: 5px;"> <p>Submitted By [REDACTED]</p> <p>Submission Date 28/06/2024 14:30</p> <p>Related File(s) <input type="checkbox"/> sample3.pdf</p> </div>						
8	test	r	ldbdbb@openskydata.com	Claim Proposer	Submitted to NTA	<input type="button" value="x"/>

