



# LEADER ICT System User Guide Project Record



# Index

Introduction .....	1
Overview .....	1
User Roles .....	2
Promoters .....	9
Overview .....	9
Adding New Promoters.....	10
LAG Projects .....	14
Overview .....	14
LAG Project Stages .....	15
Stage 00 Create New Project .....	17
Stage 01 EOI Submitted .....	23
Stage 02 EOI Eligible.....	27
Stage 03 Application Submitted.....	48
Stage 04 Application Public Procurement Checks .....	50
Stage 05 Application LAG User Sign-Off.....	57
Stage 06 Application LAG Manager Approval .....	61
Stage 07 Application Evaluation Eligibility Assessment .....	62
Stage 08 Application Article 48 User Check .....	69
Stage 09 Application Article 48 Manager Verification .....	70
Stage 10 Application Decision.....	72
Stage 11 Final LAG User Check.....	74
Stage 12 Final LAG Manager Approval.....	80
Stage 13 Final Article 48 User Check.....	82
Stage 14 Final Article 48 Manager Verification.....	83
Stage 15 Final Project Approved.....	85
Stage 16 EOI or Project Withdrawn .....	86
Stage 17 Project Rejected .....	87
Stage 18 EOI Ineligible .....	88
IP Projects .....	89
Overview .....	89
IP Project Stages.....	90
Stage 06 Application LAG Manager Approval of IP Projects.....	92
Stage 12 Final LAG Manager Approval of IP Projects .....	94
SharePoint Document Library .....	97
Troubleshooting.....	108
Resources .....	110
Support .....	111
Appendix 1 .....	112
Appendix 2 .....	114

# Glossary

Abbreviation	Definition
CRM	Customer Relationship Management
CRO	Companies Registration Office
EOI	Expression of Interest
IP	Implementing Partner
LAG	Local Action Group
LCDC	Local Community Development Committee
LDC	Local Development Company
LDS	Local Development Strategy
Promoter	Promoter of a project
RDP	Rural Development Programme
TCAN	Tax Clearance Access Number
TRN	Tax Reference Number

# Introduction

## Overview

The LEADER ICT system is a custom-built web-based CRM solution that is designed to support the administration of the LEADER element of the Rural Development Programme (RDP) 2014-2020. The development and roll-out of the ICT system is being undertaken on a phased basis:

- **Phase 1** of the system which was developed in 2016 has facilitated the submission of Monthly Returns (administration and animation expenditure) and the input of Expression of Interest (EOI) data in respect of potential project promoters.
- **Phase 2** of the system facilitates the creation and administration of projects including project-level expenditure.
- **Phase 3** of the system will incorporate additional requirements of the LEADER Programme as well as providing an opportunity for system refinements.

The specification for the LEADER ICT system has been developed by the Department of Rural and Community Development to meet the requirements for the management and administration of LEADER funding as part of the RDP 2014-2020. The Department is the Programme Manager for LEADER. Pobal is supporting the Department in the development and roll out of the ICT system, as based on the Department's requirements.

The LEADER ICT system is utilised by the following user groups:

- Local Action Groups (LAGs)
- Implementing Partners (IPs)
- Pobal Staff
- Department Officials
- Inspectorate Officials

This User Guide has been created specifically for Local Action Group users in relation to their usage of the system for Phase 2 – Projects. There are three different Local Action Group user roles - the LAG Project User, LAG User and LAG Manager. An overview of each of these user roles is provided in the next section.

## User Roles

The LEADER ICT system has a number of separate user roles that correspond to the different entities involved in the management and administration of LEADER funding. The individual user roles correspond to different levels of access to the system. The following tables provide details of each of the user roles and their associated security role/permissions for each Phase:

Local Action Group User Roles		
User Role	Monthly Returns – Phase 1 Security Role Description	Projects & Project Claims - Phase 2 Security Role Description
LAG Project User	N/A – no access to the following: LAG record; LDS record; any associated IP record; Monthly Returns functionality; LDS and Monthly Return folder in the Document Library.	<p>A user within the LAG who enters its own Project &amp; Project Claim data on the system.</p> <ul style="list-style-type: none"> <li>Can input basic EOI information for projects (Phase 1)</li> <li>Can record LAG Projects &amp; Promoters &amp; move the Project on certain Stages</li> <li>Can create Project Claims on the LAG Project record &amp; move the Claim on certain Stages</li> <li>Has access rights to the Project &amp; Project Claim sub-folder within the LAG Document Library, which contains the LAGs supporting documentation (no access to the IP Document Libraries)</li> </ul>
LAG User	<p>A user within the LAG who enters its own Monthly Return data on the system but does not have approval rights.</p> <ul style="list-style-type: none"> <li>Read-only access to own LDS and LAG record and any associated IP record</li> <li>Has access rights to the LDS Document Library folder</li> <li>Can record LAG administration and animation expenditure on the Monthly Return</li> <li>Can complete the LAG checklist relating to the LAG expenditure</li> <li>Can review the completed IP administration and animation expenditure and IP checklist (where there are associated IP/s)</li> <li>Can move the Monthly Return on certain Stages</li> <li>Has access rights to the Monthly Return Document Library 'main folder' which contains a subfolder of supporting documentation per associated IP (where relevant) as well as their own sub-folder of LAG supporting documentation</li> </ul>	<p>A user within the LAG who enters its own Project &amp; Project Claim data on the system.</p> <ul style="list-style-type: none"> <li>Can input basic Expression of Interest (EOI) information for projects (Phase 1)</li> <li>Can record LAG Projects &amp; Promoters &amp; move the Project on certain Stages</li> <li>Can create Project Claims on the LAG Project record &amp; move the Claim on certain Stages</li> <li>Has access rights to the Project &amp; Project Claim Document Library 'main folder' which contains a subfolder of supporting documentation for the associated IP (where relevant) as well as the sub-folder of LAG supporting documentation.</li> </ul>

<b>LAG Manager</b>	<p><b>A user within the LAG who reviews and approves its own Monthly Return information on the system.</b></p> <ul style="list-style-type: none"> <li>• Read-only access to own LDS and LAG record and any associated IP record</li> <li>• Has access rights to the LDS Document Library folder</li> <li>• Can review and approve the completed Monthly Return (LAG expenditure, and where relevant IP expenditure)</li> <li>• Can move the Stage on whereby the Monthly Return is submitted to Pobal for the Article 48 check, before it is forwarded to the Department.</li> <li>• Has access rights to the Monthly Return Document Library 'main folder' which contains a subfolder of supporting documentation per associated IP (where relevant) as well as their own sub-folder of LAG supporting documentation.</li> </ul>	<p><b>A user within the LAG who reviews and approves its own Project &amp; Project Claim information on the system.</b></p> <ul style="list-style-type: none"> <li>• Can review and approve the LAG Project (on the system) and any associated IP Project, at the Application Stage</li> <li>• Can view Project Promoters</li> <li>• Can move a Project on to the Stage that the Project is submitted to Pobal for Article 48 checks</li> <li>• Can review and approve the LAG, and any associated IP, Project Claim</li> <li>• Has access rights to the Project &amp; Project Claim Document Library 'main folder' which contains a subfolder of supporting documentation per associated IP (where relevant) as well as their own sub-folder of LAG supporting documentation.</li> </ul>
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Implementing Partner User Roles		
User Role	Monthly Returns – Phase 1 Security Role Description	Projects & Project Claims - Phase 2 Security Role Description
IP Project User	N/A – no access to the following: IP record; LDS record; Monthly Returns functionality; LDS and Monthly Return folder in the Document Library.	<p>A new user role within the IP who enters its own IP Project &amp; Project Claim data on the system.</p> <ul style="list-style-type: none"> <li>• Can record IP Projects &amp; Promoters &amp; move the Project on certain Stages</li> <li>• Can create Claims on the IP Projects &amp; move the Claim on certain Stages</li> <li>• Has access rights to the IP Project &amp; Project Claim Document Library, which contains the IPs own supporting documentation</li> </ul>
IP User	<p>A user within the IP organisation who enters its own IP Monthly Return data on the system but does not have approval rights.</p> <ul style="list-style-type: none"> <li>• Read-only access to own LDS record and IP record</li> <li>• No access to the LDS Document Library folder</li> <li>• Can record IP administration and animation expenditure on the Monthly Return</li> <li>• Can upload documentation in support of the reported expenditure</li> <li>• Can complete the IP checklist relating to the IP expenditure</li> <li>• Has access to the Monthly Return Document Library sub-folder within the main folder that relates to their respective IP (only), into which their own IP supporting documents will be uploaded</li> </ul>	<p>A user within the Implementing Partner (IP) organisation who enters its own IP Project &amp; Project Claim data on the system.</p> <ul style="list-style-type: none"> <li>• Can input basic EOI information for projects (in Phase 1)</li> <li>• Can record IP Projects &amp; Promoters &amp; move the Project on certain Stages</li> <li>• Can create Project Claims on the IP Projects &amp; move the Claim on certain Stages</li> <li>• Has access rights to the IP Project &amp; Project Claim Document Library, which contains the IPs own supporting documentation.</li> </ul>

<b>IP Manager</b>	<p><b>A user within the IP organisation who reviews and approves its own IP Monthly Return information on the system.</b></p> <ul style="list-style-type: none"> <li>• Read-only access to own LDS record and IP record</li> <li>• No access to the LDS Document Library folder</li> <li>• Can review and approve its own IP Monthly Return expenditure and the supporting documentation uploaded, as well as the IP checklist responses input by the IP User, before this is submitted to the LAG</li> <li>• Has access to the Monthly Return Document Library sub-folder within the main folder that relates to their respective IP (only), into which their own IP supporting documents will be uploaded</li> </ul>	<p><b>A user within the IP organisation who reviews and approves its own IP Project &amp; Project Claim information on the system.</b></p> <ul style="list-style-type: none"> <li>• Can review and approve its own IP Projects &amp; Project Claims and the supporting documentation uploaded, as well as the IP checklist responses input by the IP User</li> <li>• Can view Project Promoters</li> <li>• Has access to the Project &amp; Project Claim Document Library sub-folder within the main folder that relates to their respective IP (only), into which their IP supporting documents will be uploaded</li> </ul>
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Department User Roles		
User Role	Monthly Returns – Phase 1 Security Role Description	Projects & Project Claims - Phase 2 Security Role Description
<b>Department User</b>	<p><b>Department User who is responsible for the processing and approval of all Monthly Returns.</b></p> <ul style="list-style-type: none"> <li>Read-only access to all LDS, LAG and IP records and the LDS Document Library</li> <li>Read-only access to Monthly Returns for all LAGs and IPs, including the Monthly Return Document Library</li> <li>Monthly Return: Completes a Department Checklist, approves &amp; records payment details against each Monthly Return</li> </ul>	<p><b>Department User who is responsible for the review of all LAG &amp; IP Project Claims and payment details.</b></p> <ul style="list-style-type: none"> <li>Read-only access to Projects, Promoters and Project Claims for all LAGs and IPs</li> <li>Completes a Department Checklist, reviews &amp; records payment details against each Project Claim</li> <li>Can view/contribute to the Project and Project Claim Document Library</li> </ul>
<b>Department Manager</b>	<p><b>Department Manager with read-only access to Monthly Returns.</b></p> <ul style="list-style-type: none"> <li>Read-only access to all LDS, LAG and IP records and the LDS Document Library</li> <li>Read-only access to Monthly Returns for all LAGs and IPs, including the Monthly Return Document Library</li> </ul>	<p><b>Department Manager who is responsible for ultimately approving all LAG &amp; IP Project Claims.</b></p> <ul style="list-style-type: none"> <li>Read-only access to Projects, Promoters and Project Claims for all LAGs and IPs, including all supporting documentation uploaded to the Project &amp; Project Claim Document Library</li> <li>Approves all Project Claims and moves onto the Payment stage</li> </ul>
<b>Inspectorate User</b>	<p><b>Inspectorate User with read-only access to Monthly Returns.</b></p> <ul style="list-style-type: none"> <li>Read-only access to all LDS, LAG and IP records, and to Monthly Returns for all LAGs and IPs, including the Monthly Return Document Library</li> </ul>	<p><b>Inspectorate User who is responsible for reviewing selected LAG &amp; IP Project Claims.</b></p> <ul style="list-style-type: none"> <li>Read-only access to all Projects and Promoters</li> <li>Reviews Project Claims at the Optional Inspectorate Stage &amp; can move a Project Claim Stage forward/back as per Stage Transition</li> <li>Can view/contribute to the Project and Project Claim Document Library</li> </ul>
<b>Inspectorate Manager</b>	<p><b>Inspectorate User with read-only access to Monthly Returns.</b></p> <ul style="list-style-type: none"> <li>Read-only access to all LDS, LAG and IP records, and to Monthly Returns for all LAGs and IPs, including the Monthly Return Document Library</li> </ul>	<p><b>Inspectorate User who is responsible for reviewing selected LAG &amp; IP Project Claims.</b></p> <ul style="list-style-type: none"> <li>Read-only access to all Projects and Promoters</li> <li>Reviews Project Claims at the Optional Inspectorate Stage &amp; can move a Project Claim Stage forward/back as per Stage Transition</li> <li>Has Bulk Edit permissions.</li> <li>Can view/contribute to the Project and Project Claim Document Library</li> </ul>

Pobal User Roles		
User Role	(Monthly Returns – Phase 1) Security Role Description	(Projects & Project Claims - Phase 2) Security Role Description
<b>Article 48 User</b>	<p><b>Pobal staff member who is responsible for executing all Monthly Return Article 48 checks.</b></p> <ul style="list-style-type: none"> <li>Read-only access to the LDS, LAG and IP record</li> <li>Read-only access to Monthly Returns and expenditure details for all LAGs and IPs, including all supporting documentation uploaded</li> <li>Has access to the LDS and Monthly Return Document Library for all LAGs and IPs</li> <li>Completes the Article 48 checklist on all Monthly Returns</li> <li>Moves all Monthly Returns from Stage 4 (Approved by LAG Manager) to Stage 5 (Article 48 check in progress)</li> </ul>	<p><b>Pobal staff member who is responsible for executing all Project &amp; Project Claim Article 48 checks.</b></p> <ul style="list-style-type: none"> <li>Can view Projects, Promoters and Project Claims for all LAGs and IPs, including all supporting documentation uploaded to the Project &amp; Project Claim Document Library</li> <li>Completes the Article 48 checklist on all Projects and Project Claims</li> </ul>
<b>Article 48 Manager</b>	<p><b>Pobal staff member who is responsible for verifying all Monthly Return Article 48 checks.</b></p> <ul style="list-style-type: none"> <li>Read-only access to all LDS, LAG and IP records</li> <li>Read-only access to Monthly Returns and expenditure details for all LAGs and IPs, including all supporting documentation uploaded</li> <li>Has access to the LDS and Monthly Return Document Library for all LAGs and IPs</li> <li>Verifies the Article 48 checklist on the system</li> <li>Moves the Monthly Return to the Article 48 Verified stage</li> </ul>	<p><b>Pobal staff member who is responsible for verifying all Project &amp; Project Claim Article 48 checks.</b></p> <ul style="list-style-type: none"> <li>Can view Projects, Promoters and Project Claims for all LAGs and IPs, including all supporting documentation uploaded to the Project &amp; Project Claim Document Library</li> <li>Verifies the Article 48 Checklist on the system</li> <li>Moves the Projects and Claims to 'Article 48 Verified' stage</li> </ul>
<b>Pobal Development Co-ordinator</b>	<p><b>Pobal staff member with access to all screens/ functions pertaining to the setting up of the LDS for all LAGs and IPs.</b></p> <ul style="list-style-type: none"> <li>Can create LDS/LAG/IP records for the purpose of setting up entities on the ICT system at the outset</li> <li>Can view Monthly Return records for all LAGs and IPs</li> <li>Can view all EOI/Project records</li> <li>Has access rights to all LDS Document Library folders</li> <li>Has no access to the Monthly Return Document Library for any LAG or IP</li> </ul>	<p><b>N/A</b></p> <p>Note: this role is being replaced in Phase 2 and the current Users will be migrated to the Pobal read-only role</p>

<b>Pobal Read-Only User</b>	<b>Pobal staff member with Read-only access to all entities and attributes in the system.</b> <ul style="list-style-type: none"> <li>• Read-only access to all LDS, LAG and IP records</li> <li>• Has access rights to all LDS Document Library folders</li> <li>• Read-only access to Monthly Returns for all LAGs and IPs</li> <li>• No access to the Monthly Return Document Library for any LAG or IP</li> <li>• Can export results of filters/searches</li> </ul>	<b>Pobal staff member with Read-only access to all entities and attributes in the system.</b> <ul style="list-style-type: none"> <li>• Ready-only access to all Promoters, Projects &amp; Project Claims recorded on the system</li> <li>• No access to the Project and Project Claim Document Library</li> <li>• Can export results of filters/searches</li> </ul>
<b>LEADER System Administrator</b>	<b>Pobal staff member fulfilling the LEADER System Administrator role.</b> <ul style="list-style-type: none"> <li>• Full access to the system including Document Libraries, for the purpose of trouble-shooting, training and providing ongoing support to all users.</li> <li>• Maintains User Accounts (access and permissions), sets up the LAG/IP and LDS record</li> <li>• Creates Monthly Returns and document folders for all organisations</li> <li>• Can edit all entity data and all static data</li> </ul>	<b>Pobal staff member fulfilling the Leader System Administrator role.</b> <ul style="list-style-type: none"> <li>• Has full access to all Projects, Promoters and Project Claims records, including Document Libraries</li> <li>• Can edit all entity data and all static data</li> </ul>
<b>External 3rd Party Software Provider</b>	<b>External System Administrator</b> <ul style="list-style-type: none"> <li>• On request/approval by Pobal - Full access to all LDS/LAG/IP &amp; Monthly Return data on the system to carry out necessary technical support and maintenance, including Document Libraries</li> <li>• Access is secure and available only to those with authority when required</li> </ul>	<b>External System Administrator</b> <ul style="list-style-type: none"> <li>• On request/approval by Pobal - Full access to all LAG/IP Project &amp; Claim data on the system to carry out necessary technical support and maintenance, including Document Libraries</li> <li>• Access is secure and available only to those with authority when required</li> </ul>

# Promoters

## Overview

A Project Promoter is an individual, group or other body that submits an Expression of Interest and where a follow-on application is successful, is given a contract to deliver the approved project. The Project Promoter, as a designated beneficiary of funding under LEADER, is responsible for the delivery of the project.

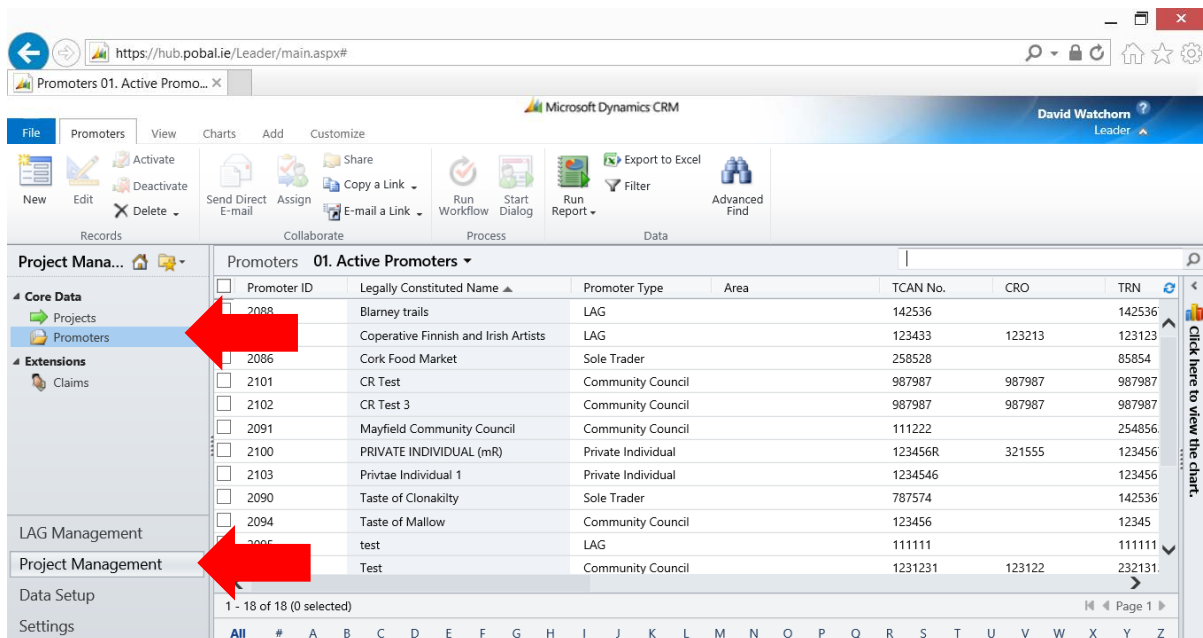
In summary:

- The Promoter is the entity submitting the proposal or promoting the project.
- The Promoter is the entity that will receive the project payments.
- The Promoter may be an individual or an organisation.
- Every project must have at least one Promoter.
- Project claim payments will be made to Promoter.

## Adding New Promoters

LAG Project Users and LAG Users can add a new Project Promoter to the system as follows:

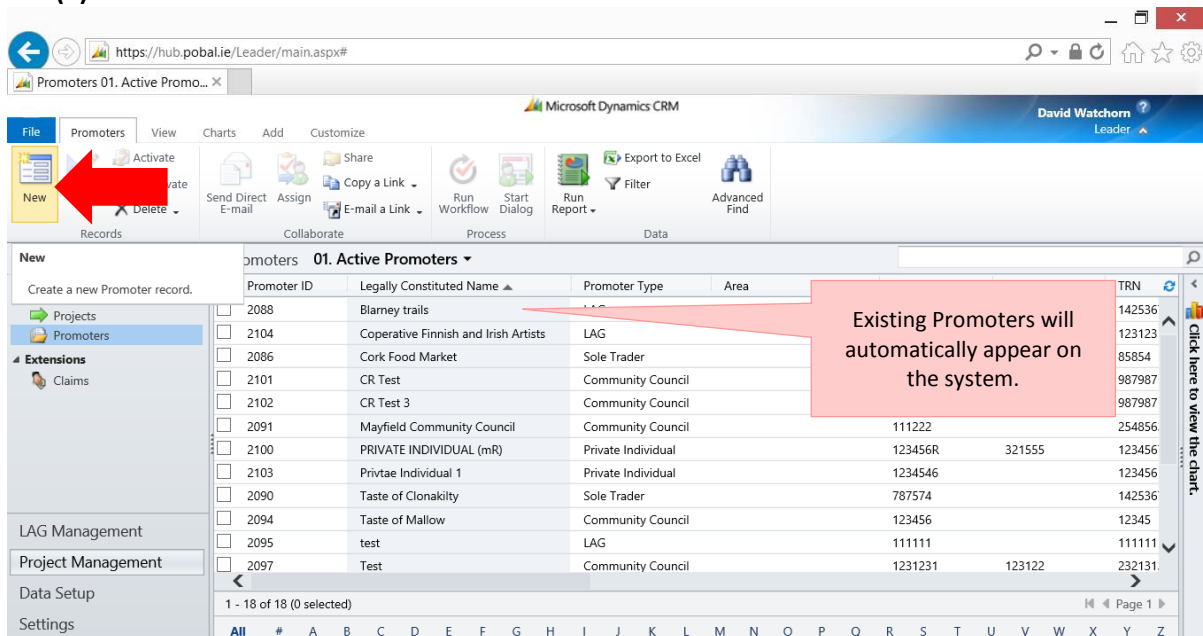
- (1) Click on **Project Management** and **Promoters**.



The screenshot shows the Microsoft Dynamics CRM interface. The left navigation pane has 'Project Management' selected. The main area displays a table of 'Promoters' with columns: Promoter ID, Legally Constituted Name, Promoter Type, Area, TCAN No., CRO, and TRN. The table contains 18 records. A red arrow points to the 'Promoters' link in the left navigation pane, and another red arrow points to the 'Project Management' link in the same pane.

Promoter ID	Legally Constituted Name	Promoter Type	Area	TCAN No.	CRO	TRN
2088	Blarney trails	LAG		142536		142536
2104	Cooperative Finnish and Irish Artists	LAG		123433	123213	123123
2086	Cork Food Market	Sole Trader		258528		85854
2101	CR Test	Community Council		987987	987987	987987
2102	CR Test 3	Community Council		987987	987987	987987
2091	Mayfield Community Council	Community Council		111222		254856
2100	PRIVATE INDIVIDUAL (mR)	Private Individual		123456R	321555	123456
2103	Private Individual 1	Private Individual		1234546		123456
2090	Taste of Clonakilty	Sole Trader		787574		142536
2094	Taste of Mallow	Community Council		123456		12345
2095	test	LAG		111111		111111
2097	Test	Community Council		1231231	123122	232131

- (2) Click **New**.



The screenshot shows the Microsoft Dynamics CRM interface with the 'New' button highlighted in the top ribbon. A red arrow points to the 'New' button, and another red arrow points to the 'Promoters' link in the left navigation pane. A red callout box points to the table, stating: "Existing Promoters will automatically appear on the system."

Promoter ID	Legally Constituted Name	Promoter Type	Area	TCAN No.	CRO	TRN
2088	Blarney trails	LAG		142536		142536
2104	Cooperative Finnish and Irish Artists	LAG		123433	123213	123123
2086	Cork Food Market	Sole Trader		258528		85854
2101	CR Test	Community Council		987987	987987	987987
2102	CR Test 3	Community Council		987987	987987	987987
2091	Mayfield Community Council	Community Council		111222		254856
2100	PRIVATE INDIVIDUAL (mR)	Private Individual		123456R	321555	123456
2103	Private Individual 1	Private Individual		1234546		123456
2090	Taste of Clonakilty	Sole Trader		787574		142536
2094	Taste of Mallow	Community Council		123456		12345
2095	test	LAG		111111		111111
2097	Test	Community Council		1231231	123122	232131

### (3) The new Promoter Form opens.

The screenshot displays the 'Promoter: New' form in Microsoft Dynamics CRM. The interface includes a top menu bar with 'File', 'Promoter', and 'Add'. Below this is a ribbon with various action buttons like 'Save', 'Save & Close', 'Delete', 'Add to Marketing List', 'Connect', 'Assign', 'Copy a Link', 'E-mail a Link', 'Run Workflow', 'Start Dialog', and 'Run Report...'. The left sidebar shows navigation options under 'Information', 'Related', 'Common', 'Sales', and 'Opportunities'. The main form area is divided into several sections: 'Promoter Details', 'Auto Address', 'Address Details', 'Contact Details', 'Funding Details', and 'Notes & Activities'. Annotations with red callout boxes highlight specific features: 'This is the Promoter form' points to the 'Promoter Details' section; 'The Auto Address feature helps you find a correct address quickly.' points to the 'Auto Address' section; 'The name, phone and email of the Promoter are here.' points to the 'Contact Details' section; and 'There is a question here about whether the Promoter has previously been in receipt of funding.' points to the 'Funding Details' section.

**Promoter: New - Microsoft Dynamics CRM - Internet Explorer**

David Watchorn  
Leader

**File Promoter Add**

Save Save & Close Delete Add to Marketing List Connect Assign Copy a Link E-mail a Link Run Workflow Start Dialog Run Report...

**Information**

- Promoter Details
- Auto Address
- Address Details
- Contact Details
- Funding Details
- Notes & Activities

**Related**

- Common
  - More Addresses
  - Activities
  - Closed Activities
  - Sub-Accounts
  - Contacts
  - Relationships
  - Connections
  - Audit History
  - Projects Promoted...
- Sales
  - Address Details
  - Contact Details
  - Funding Details
  - Notes & Activities

**Promoter New**

**Promoter Details**

Promoter ID: [Text Box] Legally Constituted Name: [Text Box]

Promoter Type: [Text Box] TCAN No.: [Text Box]

Is the Promoter a Farmer? ☒ No ☐ Yes CRO: [Text Box]

TRN: [Text Box] Herd Number: [Text Box]

**Auto Address**

Enter Full Address or Postcode [Text Box] Search [Button]

**Address Details**

Address Line 1: [Text Box] County / Dublin Postcode: [Text Box]

Address Line 2: [Text Box] Small Area: [Text Box]

Address Line 3: [Text Box] Electoral District: [Text Box]

Eircode: [Text Box]

**Contact Details**

First Name: [Text Box] Last Name: [Text Box]

Main Phone: [Text Box] E-mail: [Text Box]

**Funding Details**

Previous funding: ☒ No ☐ Yes

**Notes & Activities**

Activities

Subject	Regarding	Activity Type	Activity Status	Priority	Due Date

Notes

Enter a note [Text Box]

Status: Active

(4) The LAG Project User or the LAG User then completes the following fields.

Field	Options
Promoter ID	Auto-populates
Promoter Type*	Choose: <ul style="list-style-type: none"> <li>• Community Council</li> <li>• Company Limited by Guarantee (without Share Capital)</li> <li>• Cooperative Society registered under Industrial &amp; Provident Societies Act</li> <li>• Designated Activity Company limited by shares</li> <li>• Farmer</li> <li>• Formalised Community/Voluntary Group</li> <li>• Implementing Partner</li> <li>• Local Action Group</li> <li>• Limited Company</li> <li>• Partnership</li> <li>• Private Individual</li> <li>• Public Body</li> <li>• Registered Charity</li> <li>• Sole Trader</li> <li>• Trust</li> <li>• Other</li> </ul>
Legally Constituted Name*	Legal Name as per Company Registration or the Private Individual Name
TCAN No*	Tax Clearance Access Number
CRO No	Company Registration Office Number
TRN*	Tax Reference Number
Is the Promoter a Farmer? *	Choose <ul style="list-style-type: none"> <li>• Yes (If “Yes” the Herd Number field becomes mandatory).</li> <li>• No</li> </ul>
Herd Number	Enter the Herd Number if the Promoter is a farmer
Auto Address	The Auto Address is a feature that enables you to find an address easily and accurately. You may enter the known details of the address and or the postcode and the functionality suggests matching addresses for you to choose from.
Address Line 1*	First line of the address
Address Line 2*	Second line of the address
Address Line 3*	Third line of the address
County / Dublin Postcode	The county or the Dublin Postcode e.g. “Dublin 1”, “Dublin 2” etc.
Small Area	The Small Area of the address (if known)
Electoral District	The Electoral District of the address (if known)
Eircode*	The Eircode for the address
First Name*	The first name of the Promoter
Last Name*	The last name of the Promoter
Main Phone*	The mobile or landline of the Promoter – numbers only no spaces
Email*	The email address of the Promoter – standard email format
Previous Funding?*	This relates to whether the Promoter has previously been in receipt of any public funding. Choose <ul style="list-style-type: none"> <li>• Yes (if “Yes” the Previous Funding Amount field is mandatory)</li> <li>• No</li> </ul>
Previous Funding Amount	The amount of any previous public funding in euros.

(5) The Promoter record is now complete and should look like this.

Promoter: New - Microsoft Dynamics CRM - Internet Explorer

Microsoft Dynamics CRM

David Watchorn  
Leader

File Promoter Add

Save Save & Close Deactivate Save & New Add to Marketing List Connect Assign Sharing Copy a Link E-mail a Link Run Workflow Start Dialog Run Report

Save Collaborate Process Data

Information

- Promoter Details
- Auto Address
- Address
- Contact
- Funding
- Notes & Activities

Promoter

Taste of Mallow

Promoters

Promoter Details

Promoter ID 2084

Legally Constituted Name Taste of Mallow

Promoter Type Limited Company

TCAN No. 123456

Is the Promoter a Farmer? ☒ No ☐ Yes

CRO

TRN 12345

Herd Number

Auto Address

Address

Address Line 1 1

County / Dublin Postcode Co. Cork

Address Line 2 Main Street

Small Area CHURCHTOWN

Address Line 3 Mallow

Electoral District MALLOW NORTH URBAN

Eircode 123456

Contact

First Name Ann

Main Phone 01 123456

Last Name FitzGerald

E-mail ann@fitzgerald.com

Funding

Previous funding ☒ No ☐ Yes

Notes & Activities

Activities

Activities Open Activities

Subject	Regarding	Activity Type	Activity Status	Priority	Due Date
<p>Enter a note</p>					

Status Active

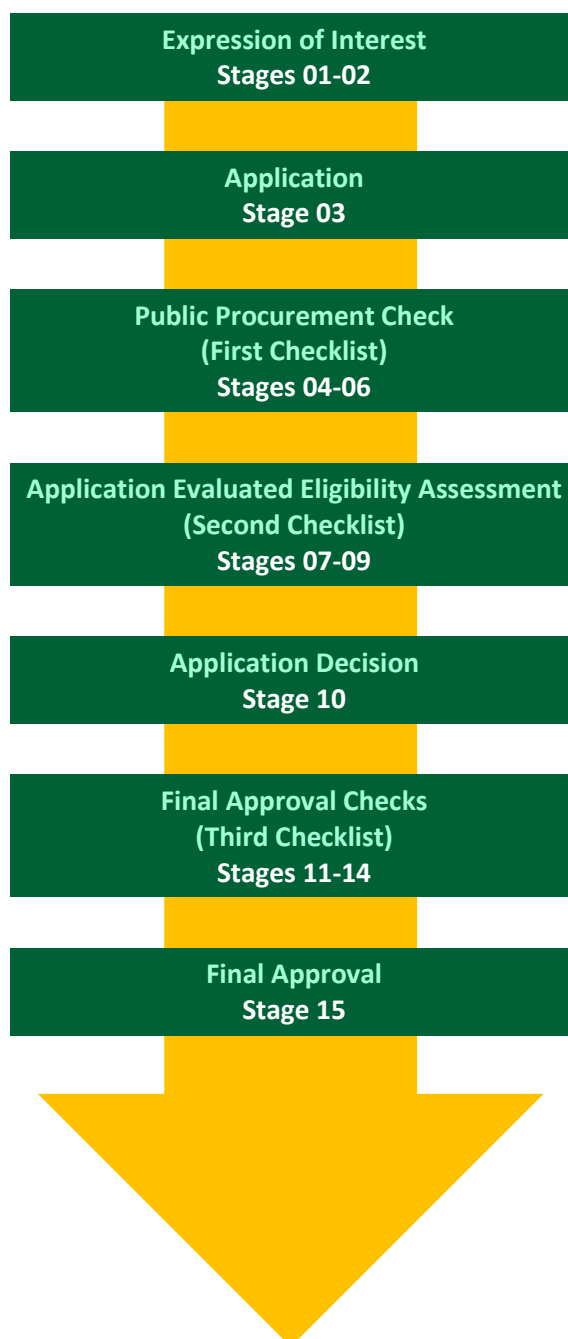
125%

# LAG Projects

## Overview

The main purpose of the LEADER system is to support the recording and management of LEADER projects. Following the submission of an Expression of Interest by a project promoter, each project record can transition through a series of stages as it progresses through the decision-making process. Each of the system users in the Local Action Groups, Pobal and the Department have different roles in transitioning the record through the various stages. An overview of the key stages for approved projects is provided below.

The specific role of the Local Action Group in a project will be determined by whether the project is created by: (a) the Local Action Group itself or (b) an associated Implementing Partner. For ease of reference, the two distinct roles are detailed in separate sections of the User Guide as follows: LAG project stages (Page 37 below) and IP project stages (Page 111).



## LAG Project Stages

There are 15 stages for a project that is created by the Local Action Group, as well as 3 stages which are relevant for the withdrawal or rejection of a Project or EOI. The table below provides a summary of each stage along with details of the specific user role which completes the stage and the next stage that the project progresses to.

Stage	LAG Project User	LAG User	LAG Manager	Article 48 User	Article 48 Manager	Can Progress To Stage
<b>Create New EOI</b> Enter basic EOI details including Promoter, Indicative Budget, Project Name and Description, Primary Local Objective. Save as "01 EOI Submitted"	LAG Project User	LAG User				↓ 01
<b>01 EOI Submitted</b> Enter any outstanding EOI details. The EOI can now be progressed to "02 EOI Eligible".	LAG Project User	LAG User				↓ 02 ↓ 16 ↓ 18
<b>02 EOI Eligible</b> Enter Application form details including Sector or Initiative, Project Type, Sub-Type, Financials. Progress to "03 Application Submitted".	LAG Project User	LAG User				↓ 03 ↓ 16 ↓ 18
<b>03 Application Submitted</b> Progress project to "04 Application Public Procurement Checklist"	LAG Project User	LAG User				↓ 04 ↓ 16 ↓ 17
<b>04 Application Public Procurement Checklist</b> Answer the Public Procurement checklist questions and progress to "05 Application LAG User Sign Off".	LAG Project User	LAG User				↓ 05 ↓ 16 ↓ 17
<b>05 Application LAG Sign Off</b> The project is signed off by the LAG User. Progress to "06 Application LAG Manager Approval"		LAG User				↓ 06 ↓ 16 ↓ 17
<b>06 Application LAG Manager Approval</b> The project is approved by the LAG Manager. Progress to "07 Application Evaluation Eligibility Checklist"			LAG Manager			↓ 07 ↓ 16 ↓ 17
<b>07 Application Evaluation Eligibility Checklist</b> The Application Evaluation Eligibility Assessment Checklist questions are completed. Progress to "08 Application Article 48 User Check".	LAG Project User	LAG User				↓ 08 ↓ 16
<b>08 Application Article 48 User Check</b> The Pobal Article 48 User fills in responses to all the checklist questions and progresses to "09 Application Article 48 Manager Verification".				Article 48 User		↓ 09 ↓ 10 ↓ 16
<b>09 Application Article 48 Manager Verification</b> The Article 48 Verification by the Pobal Article 48 Manager before the Application decision. Progress to "09 Application Article 48 Manager Verification".					Article 48 Manager	↓ 10 ↓ 16

Stage	LAG Project User	LAG User	LAG Manager	Article 48 User	Article 48 Manager	Can Progress To Stage
<b>10 Application Decision</b> The decision on the application is made and the Board Approval Date is entered. The project is then progressed to "11 Final LAG or IP User Check".	LAG Project User	LAG User				↓ 11 ↓ 16 ↓ 17
<b>11 Final LAG Check</b> The Final Approval Checklist is completed by the LAG Project User or LAG User. The project is then progressed to "12 Final LAG Manager Approval".	LAG Project User	LAG User				↓ 12 ↓ 16 ↓ 17
<b>12 Final LAG Manager Approval</b> The Final Approval Checklist responses are approved by the LAG Manager. The project is then progressed to "13 Final Article 48 User Check".			LAG Manager			↓ 13 ↓ 16 ↓ 17
<b>13 Final Article 48 User Check</b> The Final Approval Checklist responses are checked by the Pobal Article 48 User. Progress to "14 Final Article 48 Manager Verification".				Article 48 User		↓ 14 ↓ 16 ↓ 17
<b>14 Final Article 48 Manager Verification</b> The Final Approval Checklist responses are verified by the Pobal Article 48 Manager. The project is progressed to "15 Final Project Approved".					Article 48 Manager	↓ 15 ↓ 16 ↓ 17
<b>15 Final Project Approved</b> The project is now approved. The LAG or Project User can populate Letter of Offer and Contract dates at this Stage.	LAG Project User	LAG User				↓ 16 ↓ 17
<b>16 EOI or Project Withdrawn</b> A status for the Withdrawal of the Expression of Interest or the Project.	LAG Project User	LAG User				-
<b>17 Project Rejected</b> A status for the Rejection of the Application at Decision stage.	LAG Project User	LAG User				-
<b>18 EOI Ineligible</b> A status for setting Expressions of Interest to ineligible.	LAG Project User	LAG User				-

## Stage 00

### Create New Project

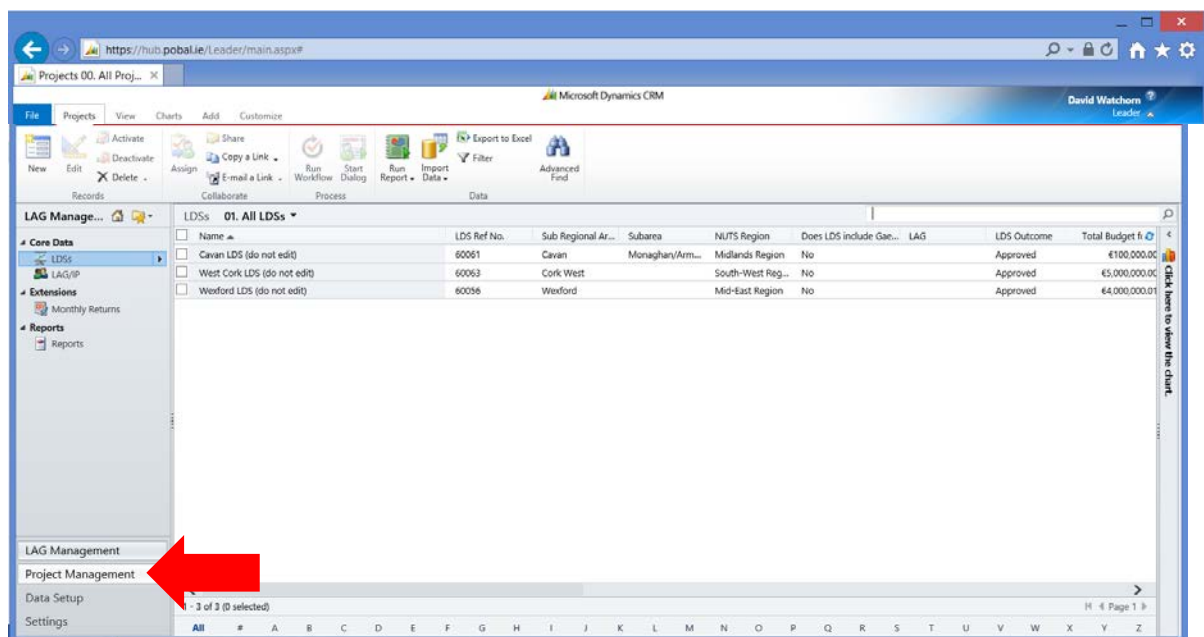
#### Overview

Stage	LAG Project User	LAG User	LAG Manager	Article 48 User	Article 48 Manager	Can Progress To Stage
<b>Create New Project</b> Enter basic details including Promoter, Indicative Budget, Project Name and Description. Save as "01 EOI Submitted"	LAG Project User	LAG User				↓ 01

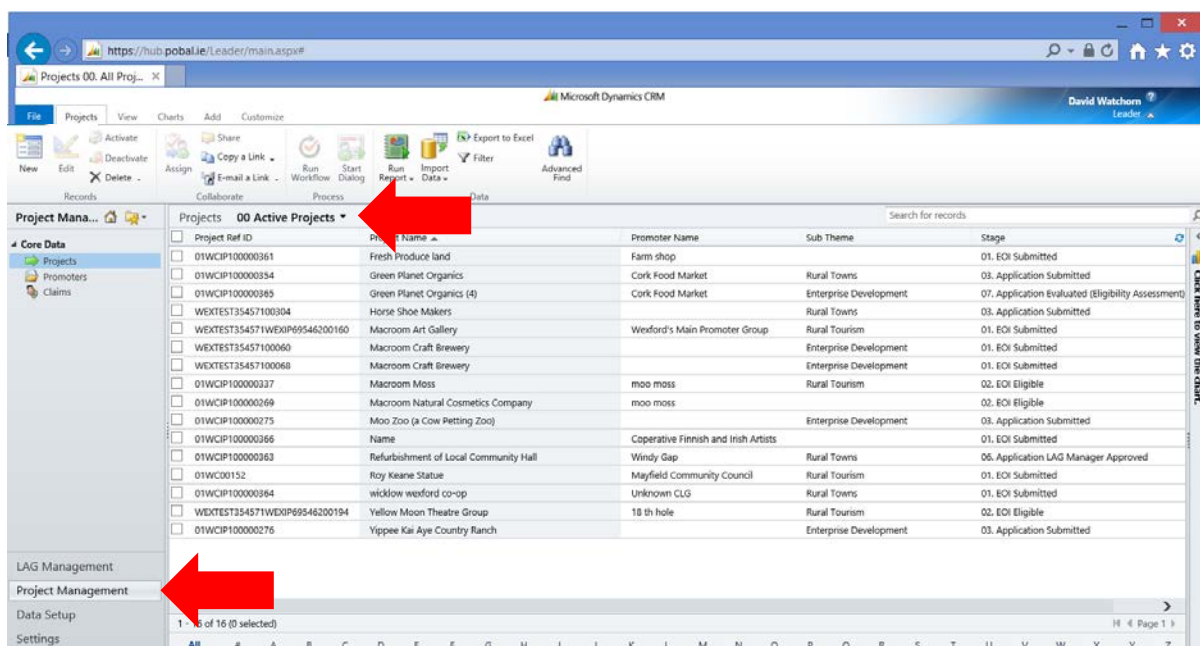
All Expressions of Interest received must be recorded on the LEADER ICT System. This involves the creation of a new Project record by the LAG Project User or LAG User. The first step is for the LAG Project User or LAG User to enter basic details including the **Promoter, Indicative Budget**, the **Primary Local Objective** that the project is aligned to, **Date EOI Received, Project Name** and **Description**. A number of other fields are automatically populated. Once this is complete the project is saved at stage **01 EOI Submitted**.

#### Process

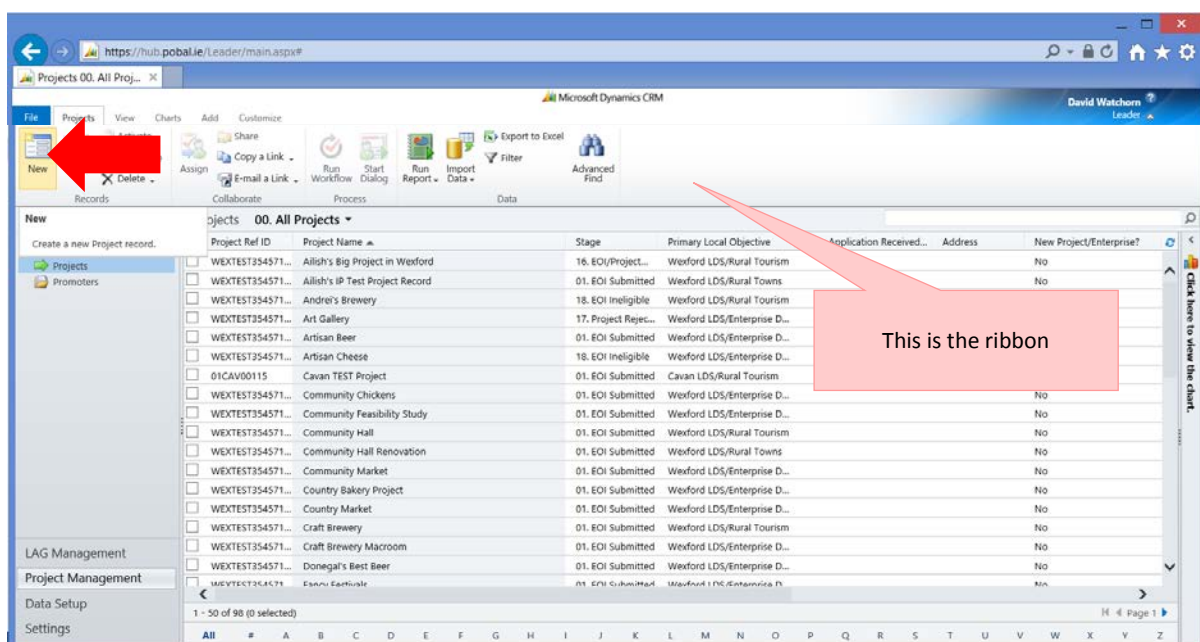
- (1) In the Left Navigation click **Project Management**.



- (2) **The Projects area opens** showing the default “00 Active Projects” view of all projects that have already been created by LAG Project Users or LAG Users within your own Local Action Group organisation.



- (3) **On the ribbon click New.**



(4) A new Project record form opens.

https://hub.pobal.ie/Leader/main.aspx#

Projects 00. All Proj...

Microsoft Dynamics CRM

David Watchorn  
Leader

File Projects View Charts Add Customize

Save Save & New Save Save & Close Delete Assign Copy a Link E-mail a Link Collaborate Run Workflow Start Dialog Run Report - Process Data

Note that it says "New" here.

Project Basic

- General
- Questions
- Dates
- Reasons & Notes
- Art 48 Application Ch...
- Financials

Related

- Common
  - Documents
  - Audit History
  - Co-operation Projects
  - Pobal/Dept Internal N...
  - Stage Audits
  - Checklist Responses f...
- Processes
  - Workflows
  - Dialog Sessions

Project New

General

Project Ref ID

Promoter Name \*

LAG \*

LDS

Assignee \*

David Watchorn

Stage \*

01. EOJ Submitted

LAG Ref ID

Call Type \*

Indicative Grant Amount \*

Gaeltacht Area? ☒ No ☐ Yes

Is this an Enterprise? ☒ No ☐ Yes

Island Area? ☒ No ☐ Yes

Project Description \*

Project Name \*

Description \*

Status Active

(5) The first step in creating a new project record is to add the Promoter. Click on the blue icon beside Promoter Name field.

https://hub.pobal.ie/Leader/main.aspx#

Projects 00. All Proj...

Microsoft Dynamics CRM

David Watchorn  
Leader

File Projects View Charts Add Customize

Save Save & New Save Save & Close Delete Assign Copy a Link E-mail a Link Collaborate Run Workflow Start Dialog Run Report - Process Data

Project Basic

- General
- Questions
- Dates
- Reasons & Notes
- Art 48 Application Ch...
- Financials

Related

- Common
  - Documents
  - Audit History
  - Co-operation Projects
  - Pobal/Dept Internal N...
  - Stage Audits
  - Checklist Responses f...
- Processes
  - Workflows
  - Dialog Sessions

Project New

General

Project Ref ID

Promoter Name \*

LAG \*

LDS

Assignee \*

David Watchorn

Stage \*

01. EOJ Submitted

LAG Ref ID

Call Type \*

Indicative Grant Amount \*

Gaeltacht Area? ☒ No ☐ Yes

Is this an Enterprise? ☒ No ☐ Yes

Island Area? ☒ No ☐ Yes

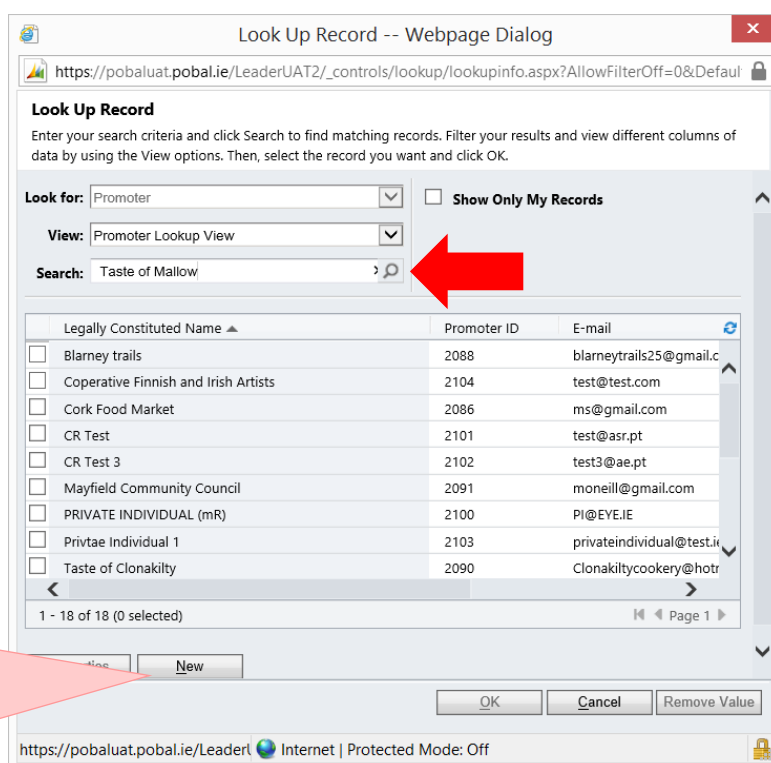
Project Description \*

Project Name \*

Description \*

Status Active

- (6) The list of **existing Promoters** is presented i.e. the list of promoters who are associated with the LDS for that particular sub-regional area. As a Local Action Group, this will include promoters that you have entered, as well as any promoters recorded by your associated Implementing Partners. Scroll through the list or use the **Search box** to **find the Promoter**.



**Look Up Record**

Enter your search criteria and click Search to find matching records. Filter your results and view different columns of data by using the View options. Then, select the record you want and click OK.

Look for: Promoter ☐ Show Only My Records

View: Promoter Lookup View

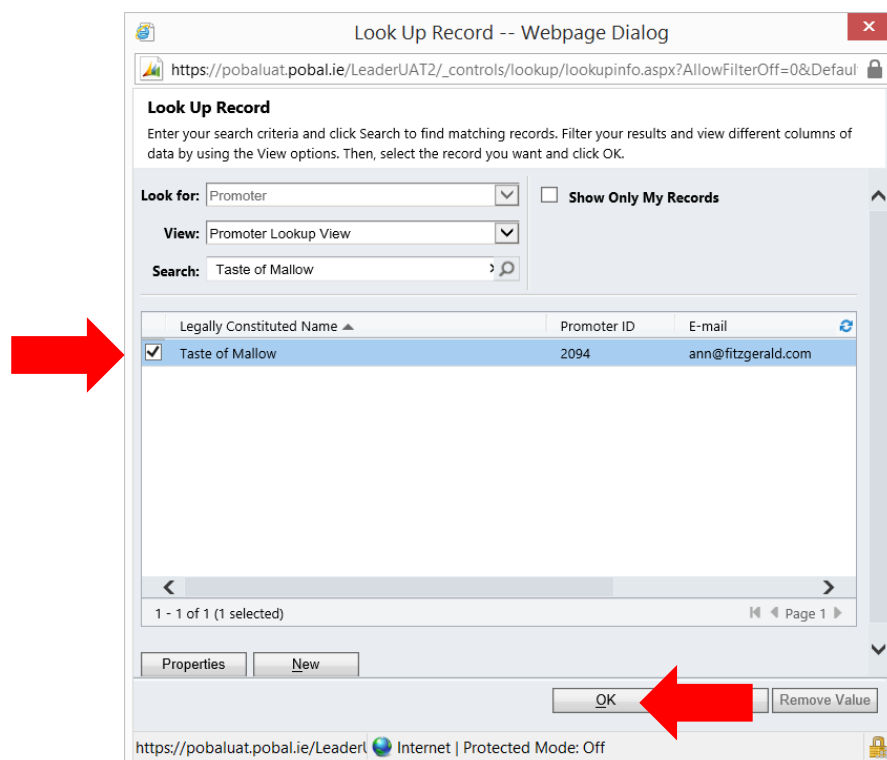
Search: Taste of Mallow

Legally Constituted Name	Promoter ID	E-mail
<input type="checkbox"/> Blarney trails	2088	blarneytrails25@gmail.c
<input type="checkbox"/> Cooperative Finnish and Irish Artists	2104	test@test.com
<input type="checkbox"/> Cork Food Market	2086	ms@gmail.com
<input type="checkbox"/> CR Test	2101	test@asr.pt
<input type="checkbox"/> CR Test 3	2102	test3@ae.pt
<input type="checkbox"/> Mayfield Community Council	2091	noneill@gmail.com
<input type="checkbox"/> PRIVATE INDIVIDUAL (mR)	2100	PI@EYE.IE
<input type="checkbox"/> Private Individual 1	2103	privateindividual@test.i
<input type="checkbox"/> Taste of Clonakilty	2090	Clonakiltycookery@hotr

1 - 18 of 18 (0 selected) Page 1

If the Promoter is not set up, you can set it up using the **New** button here. Detailed instructions on setting up a promoter are provided [here](#).

- (7) Once you have found the correct promoter, tick the **box** beside the name of the Promoter and click **OK**. Alternatively you can just click on the name of the Promoter.



**Look Up Record**

Enter your search criteria and click Search to find matching records. Filter your results and view different columns of data by using the View options. Then, select the record you want and click OK.

Look for: Promoter ☐ Show Only My Records

View: Promoter Lookup View

Search: Taste of Mallow

Legally Constituted Name	Promoter ID	E-mail
<input checked="" type="checkbox"/> Taste of Mallow	2094	ann@fitzgerald.com

1 - 1 of 1 (1 selected) Page 1

(8) The Promoter will automatically populate into the Promoter Name field.

The screenshot shows the 'New Project' form in Microsoft Dynamics CRM. The 'Promoter Name' field is highlighted with a red arrow, indicating it is populated with 'Taste of Mallow'. The form includes various other fields for project details, such as 'Project Ref ID', 'Assignee', 'Stage', 'LAG', 'LDS', 'Indicative Grant Amount', 'Gaeltacht Area?', 'Is this an Enterprise?', 'Project Description', and 'Status'.

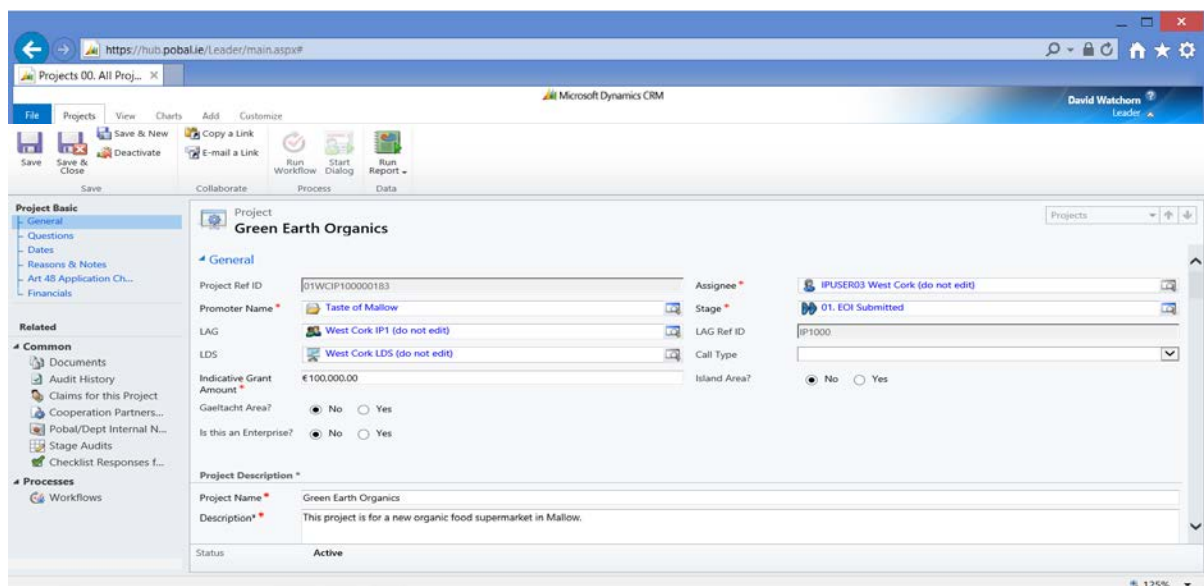
(9) Complete the remaining fields as indicated by the asterisk and click **Save & Close** at top right of screen.

Field	Options
<b>Project Name*</b>	The name of the project
<b>Description*</b>	The project description must be at least 150 characters long.
<b>Indicative Grant Amount*</b>	The estimated <u>Indicative</u> Grant Amount
<b>Call Type*</b>	Choose: <ul style="list-style-type: none"> <li>Rolling Call</li> <li>Targeted</li> </ul>
<b>Gaeltacht Area?</b>	Choose: <ul style="list-style-type: none"> <li>Yes</li> <li>No</li> </ul>
<b>Island Area?</b>	Choose: <ul style="list-style-type: none"> <li>Yes</li> <li>No</li> </ul>
<b>Date EOI Submitted*</b>	Select the date that the Expression of Interest was submitted from calendar.
<b>Stage*</b>	Auto-populates

- (10) Select the relevant **Primary Local Objective** that corresponds to your project from the following options. These are associated with the Local Development Strategy for your Sub-Regional Area.

Field	Options
<b>Primary Local Objective*</b>	<p>Choose:</p> <p><b>Theme 1: Economic Development, Enterprise Development and Job Creation</b></p> <ul style="list-style-type: none"> <li>Sub-theme 1-1: Rural Tourism</li> <li>Sub-theme 1-2: Enterprise Development</li> <li>Sub-theme 1-3: Rural Town</li> <li>Sub-theme 1-4: Broadband</li> </ul> <p><b>Theme 2: Social Exclusion</b></p> <ul style="list-style-type: none"> <li>Sub-theme 2-1: Basic Services Targeted at Hard-to-Reach Communities</li> <li>Sub-theme 2-2: Rural Youth</li> </ul> <p><b>Theme 3: Rural Environment</b></p> <ul style="list-style-type: none"> <li>Sub-theme 3-1: Protection and sustainable use of water resources</li> <li>Sub-theme 3-2: Protection and improvement of local bio-diversity</li> <li>Sub-theme 3-3: Development of renewable energy</li> </ul>
<b>Theme</b>	Auto-populates based on your Local Development Strategy (LDS)
<b>Sub-Theme</b>	Auto-populates based on your Local Development Strategy (LDS)

- (11) **Save the Project.** The project is now at **Stage 01 EOI Submitted** and the **Project ID** is generated.



The screenshot shows the Microsoft Dynamics CRM interface for a project named 'Green Earth Organics'. The 'Project Basic' form is displayed, showing various fields and their values:

- Project Ref ID:** 01WCP100000183
- Promoter Name:** Taste of Mallow
- LAG:** West Cork IP1 (do not edit)
- LDS:** West Cork LDS (do not edit)
- Indicative Grant Amount:** €100,000.00
- Gaeltacht Area?** No
- Is this an Enterprise?** No
- Assignee:** IPUSER03 West Cork (do not edit)
- Stage:** 01. EOI Submitted
- LAG Ref ID:** IP1000
- Call Type:** (dropdown menu)
- Island Area?** No
- Project Description:**
  - Project Name:** Green Earth Organics
  - Description:** This project is for a new organic food supermarket in Mallow.
  - Status:** Active

#### Notes:

- The project is now at **Stage 01 EOI Submitted** and the **Project ID** is generated.
- The project can be progressed to **Stage 02 EOI Eligible**.
- The project can be progressed to **Stage 16 EOI or Project Withdrawn**, if it is withdrawn.
- The project can be progressed to **Stage 18 EOI Ineligible**, if it is ineligible.
- The project **cannot be reversed**.

# Stage 01 EOI Submitted

## Overview

Stage	LAG Project User	LAG User	LAG Manager	Article 48 User	Article 48 Manager	Can Progress To Stage
<b>01 EOI Submitted</b> Enter any outstanding information that relates to the project. The project is then progressed to "02 EOI Eligible".	LAG Project User	LAG User				↓ 02 ↓ 16 ↓ 18

At Stage 01 EOI Submitted, the LAG Project User or LAG User enters any outstanding information that relates to the project such as additional information for the Project Description. Once complete the project is progressed to **Stage 02 EOI Eligible** indicating that the Expression of Interest is eligible to go forward to a full application. Alternatively the project is reversed by the LAG Project User or LAG User to Stage 00 Create New Project for amending.

## Process

- (1) Open the project which is currently at Stage 01 EOI Submitted.

The screenshot displays the Microsoft Dynamics CRM interface for a project record titled "Green Earth Organics". The interface includes a top navigation bar with the URL "https://hubs.pobal.ie/Leader/main.aspx#". Below this is a ribbon with tabs for "File", "Projects", "View", "Charts", "Add", and "Customize". The "Projects" tab is active, showing options like "Save", "Save & Close", "Deactivate", "Copy a Link", "E-mail a Link", "Run Workflow", "Start Dialog", and "Run Report".

The main content area shows the "Project Basic" section with a left-hand navigation pane containing "General", "Questions", "Dates", "Reasons & Notes", "Art 48 Application Ch...", and "Financials". The "General" section is expanded, displaying various fields:

- Project Ref ID:** 01WCIP100000103
- Promoter Name:** Taste of Mallow
- LAG:** West Cork IP1 (do not edit)
- LDS:** West Cork LDS (do not edit)
- Indicative Grant Amount:** €100,000.00
- Gaeltacht Area?** No (selected)
- Is this an Enterprise?** No (selected)
- Project Description:** Green Earth Organics
- Description:** This project is for a new organic food supermarket in Mallow.
- Status:** Active

On the right side of the form, there are fields for "Assignee" (IPUSER03 West Cork (do not edit)), "Stage" (01. EOI Submitted, highlighted with a red arrow), "LAG Ref ID" (IP1000), and "Call Type" (dropdown menu). The "Island Area?" field has radio buttons for "No" (selected) and "Yes".

(2) The project record should now look like this:

The screenshot shows the Microsoft Dynamics CRM interface for a project record titled 'Green Earth Organics'. The left-hand navigation pane is expanded, showing the 'Project Basic' section with 'General' selected. Below 'General', there are links for 'Questions', 'Dates', 'Reasons & Notes', 'Art 48 Application Ch...', and 'Financials'. The 'Related' section includes 'Common' (Documents, Audit History, Claims for this Project, Cooperation Partners..., Pobal/Dept Internal N..., Stage Audits, Checklist Responses f...) and 'Processes' (Workflows). The main content area displays the 'General' tab of the project record. Fields include: Project Ref ID (01WCIP100000183), Promoter Name (Taste of Mallow), LAG (West Cork IP1 (do not edit)), LDS (West Cork LDS (do not edit)), Indicative Grant Amount (€100,000.00), Gaeltacht Area (No), Is this an Enterprise? (No), Project Description (Green Earth Organics), Primary Local Objective (West Cork LDS/Enterprise Development), Theme (Rural Economic Development, Enterprise Development And Job Creation), Sub Theme (Enterprise Development), and Sector/Initiative. The right-hand pane shows the 'Assignee' (IPUSER03 West Cork (do not edit)), 'Stage' (02. EOI Eligible), 'LAG Ref ID' (P1000), and 'Call Type' (No).

(3) Upload any relevant documents to the Documents folder.

This screenshot is identical to the one above, showing the 'Green Earth Organics' project record. A red arrow points to the 'Documents' link in the 'Related' > 'Common' section of the left-hand navigation pane, indicating where to upload relevant documents.

- (4) The record is now progressed to the next stage. **Click on the icon to the right of the Stage field.**

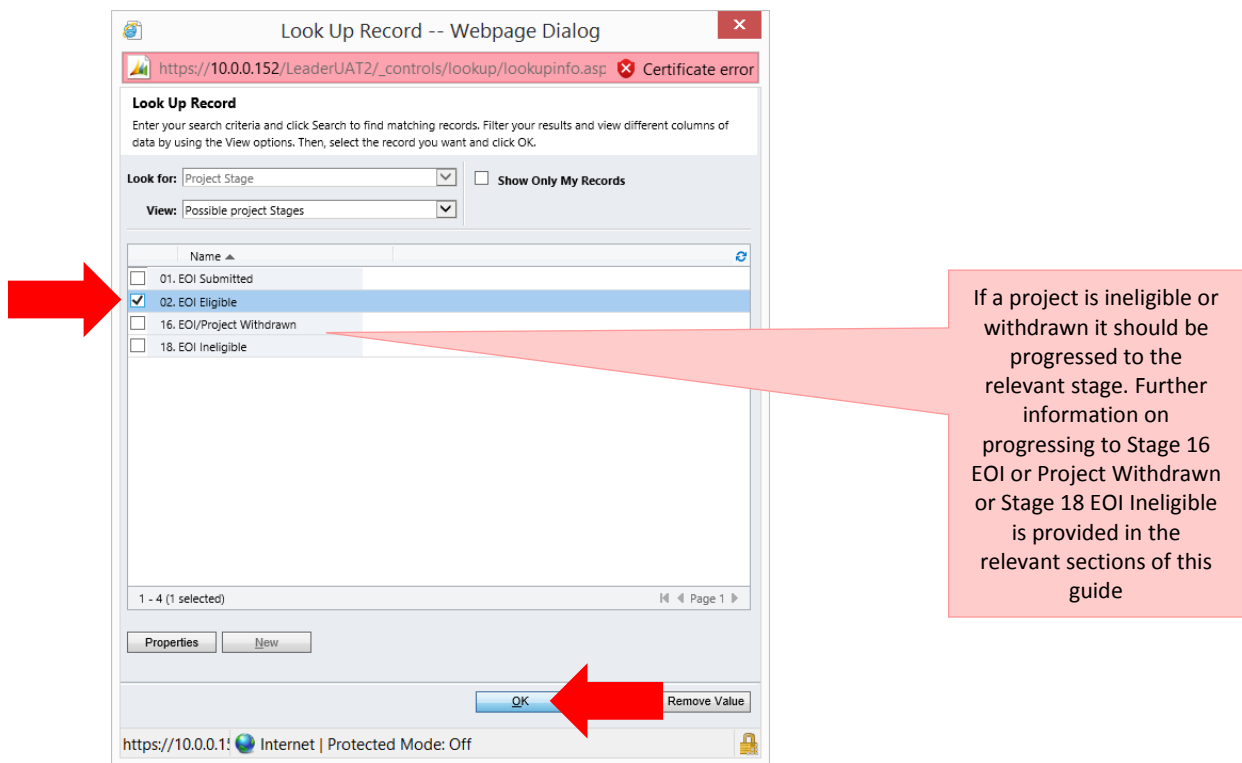
The screenshot shows the 'Project Basic' form for 'Green Earth Organics'. The 'Stage' field is set to '02: EOI Eligible'. A red arrow points to the icon to the right of the Stage field.

- (5) **The Stage lookup screen opens showing all possible Stage Transitions which the LAG Project User or LAG User can make at this point.**

The screenshot shows the 'Look Up Record -- Webpage Dialog'. The 'View' dropdown menu is set to 'Possible project Stages'. A red arrow points to the 'View' dropdown menu.

Name
<input type="checkbox"/> 01. EOI Submitted
<input type="checkbox"/> 02. EOI Eligible
<input type="checkbox"/> 16. EOI/Project Withdrawn
<input type="checkbox"/> 18. EOI Ineligible

(6) Place a tick beside **02 EOI Eligible** and click **OK**.



**Look Up Record -- Webpage Dialog**

Enter your search criteria and click Search to find matching records. Filter your results and view different columns of data by using the View options. Then, select the record you want and click OK.

Look for: Project Stage ☐ Show Only My Records

View: Possible project Stages

Name
<input type="checkbox"/> 01. EOI Submitted
<input checked="" type="checkbox"/> 02. EOI Eligible
<input type="checkbox"/> 16. EOI/Project Withdrawn
<input type="checkbox"/> 18. EOI Ineligible

1 - 4 (1 selected) Page 1

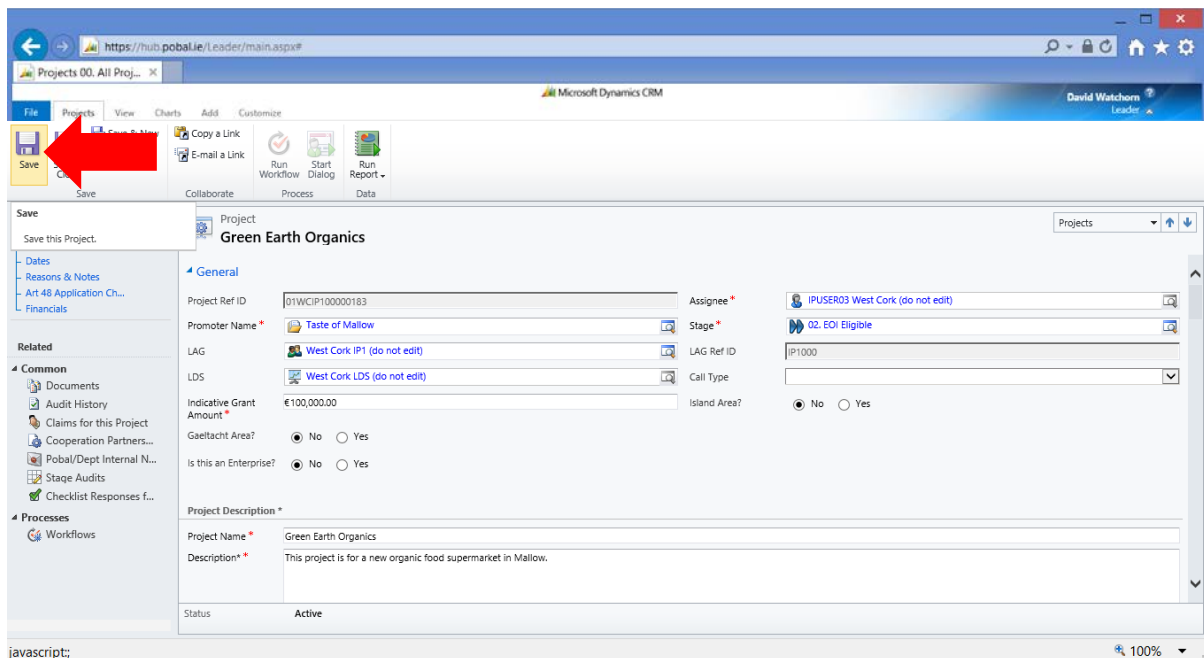
Properties New

OK Remove Value

https://10.0.0.1! Internet | Protected Mode: Off

If a project is ineligible or withdrawn it should be progressed to the relevant stage. Further information on progressing to Stage 16 EOI or Project Withdrawn or Stage 18 EOI Ineligible is provided in the relevant sections of this guide

(7) Click **Save** to update the record to the new stage which is **02 EOI Eligible**.



Save this Project.

Project: Green Earth Organics

Project Ref ID: 01WCIP100000183

Promoter Name: Taste of Mallo

LAG: West Cork IP1 (do not edit)

LDS: West Cork LDS (do not edit)

Indicative Grant Amount: €100,000.00

Geatacht Area? ☒ No ☐ Yes

Is this an Enterprise? ☒ No ☐ Yes

Project Description:

Project Name: Green Earth Organics

Description: This project is for a new organic food supermarket in Mallo...

Status: Active

## Notes:

- The project is now at **Stage 02 EOI Eligible**.
- The project can be progressed to **Stage 03 Application Submitted**.
- The project can be progressed to **Stage 16 EOI or Project Withdrawn** if it is withdrawn.
- The project can be progressed to **Stage 18 EOI Ineligible** if it is ineligible.
- The project can be reversed to **Stage 01 EOI Submitted** if basic information needs amending.

## Stage 02 EOI Eligible

### Overview

Stage	LAG Project User	LAG User	LAG Manager	Article 48 User	Article 48 Manager	Can Progress To Stage
<b>02 EOI Eligible</b> Enter further details including Sector or Initiative, Project Type, Sub-Type, Financials and progress to "03 Application Submitted".	LAG Project User	LAG User				↓ 03 ↓ 16 ↓ 18

This stage involves the inclusion of additional project information including the **Sector or Initiative, Project Type, Project Sub-Type, Applicant Type, Financial fields and the Questions section**, as well as the **Date Application submitted**. It represents the final step before an Expression of Interest becomes a formal application. Once the relevant information has been completed, the project can be progressed to **Stage 03 Application Submitted**. Alternatively the project is reversed by the LAG Project User or LAG User to Stage 01 EOI Submitted for amending.

### Process

- (1) The LAG Project User or LAG User opens the project record which is at Stage 02 EOI Eligible.

The screenshot displays the Microsoft Dynamics CRM interface for a project record titled 'Green Earth Organics'. The 'Stage' field is set to '02. EOI Eligible', which is highlighted by a red arrow. The interface includes a navigation pane on the left with sections like 'Project Basic', 'Related', and 'Common'. The main area shows various fields for the project, including 'Project Ref ID', 'Promoter Name', 'LAG', 'LDS', 'Indicative Grant Amount', 'Gaeilteacht Area?', 'Is this an Enterprise?', 'Assignee', 'Stage', 'LAG Ref ID', 'Call Type', 'Island Area?', 'Enterprise Type', and 'New or Existing Enterprise?'. The 'Assignee' field is set to 'IPUSER03 West Cork (do not edit)'. The 'Stage' field is set to '02. EOI Eligible'. The 'LAG Ref ID' is 'IP1000'. The 'Call Type' is set to 'No'. The 'Island Area?' is set to 'No'. The 'Enterprise Type' is 'Medium'. The 'New or Existing Enterprise?' is 'New'.

(2) The LAG Project User or LAG User completes the following basic information fields:

Field	Options
<b>Is this an Enterprise?*</b>	Choose: <ul style="list-style-type: none"> <li>• Yes (If “Yes” the following two questions are mandatory)</li> <li>• No</li> </ul>
<b>Enterprise Type</b>	Choose: <ul style="list-style-type: none"> <li>• Medium</li> <li>• Small</li> <li>• Micro</li> </ul>
<b>New or Existing Enterprise?</b>	Choose: <ul style="list-style-type: none"> <li>• New</li> <li>• Existing</li> </ul>
<b>Project Type*<sup>1</sup></b>	Choose: <ul style="list-style-type: none"> <li>• Analysis and Development</li> <li>• Capital</li> <li>• Large Scale Project</li> <li>• Marketing</li> <li>• Training</li> </ul>
<b>Project Sub-Type*</b>	Choose: <ul style="list-style-type: none"> <li>• Artisan food</li> <li>• Co-operation Inter-territorial Full</li> <li>• Co-operation Inter-territorial Preparatory</li> <li>• Co-operation Cross-Border Full</li> <li>• Co-operation Cross-Border Preparatory</li> <li>• Co-operation Transnational Full Project</li> <li>• Co-Operation Transnational Preparatory</li> <li>• REDZ</li> <li>• Not Applicable (For most projects you choose “Not Applicable”)</li> </ul>
<b>Applicant Type*</b>	Choose: <ul style="list-style-type: none"> <li>• Community</li> <li>• Hard to Reach Communities</li> <li>• Private</li> </ul>
<b>Maximum Funding*</b>	Auto-populates based on Project Type and Project Sub-Type. See Appendix 1.
<b>Maximum Rate of Aid*</b>	Auto-populates based on Project Type and Project Sub-Type. See Appendix 1.

---

<sup>1</sup> See Appendix 1 for further information on the Maximum Rate of Aid and Maximum Funding by Project Type, Project Sub-Type and Applicant Type.

(3) Next choose the **Sector or Initiative**.

<b>Sector or Initiative<sup>2*</sup></b>	<p>Choose from drop down list. Note that the options available are those associated with the Primary Local Objective, Theme and Sub-Theme. Full list of possibilities:</p> <p><b>Theme 1: Economic Development, Enterprise Development and Job Creation</b></p> <p><b>Subtheme 1-1: Rural Tourism</b></p> <ul style="list-style-type: none"> <li>• Activity/Adventure Tourism (angling, walking, cycling)</li> <li>• Agri-Tourism</li> <li>• Cluster/network of Tourism Businesses</li> <li>• Culture &amp; Heritage Tourism</li> <li>• Eco-Tourism</li> <li>• Food Tourism</li> <li>• Health &amp; Wellness Tourism</li> <li>• Marine &amp; Water-based Tourism</li> <li>• Promotion of area as “destination” (website development, etc.)</li> <li>• Other (please specify)</li> </ul> <p><b>Subtheme 1-2: Enterprise Development</b></p> <ul style="list-style-type: none"> <li>• Agricultural Diversification (e.g. farm shops)</li> <li>• Creative Industries</li> <li>• Food &amp; Beverage</li> <li>• Hospitality</li> <li>• ICT</li> <li>• Marine Diversification (e.g. fish smoking)</li> <li>• Social Enterprise</li> <li>• Other (please specify)</li> </ul> <p><b>Subtheme 1-3: Rural Town</b></p> <ul style="list-style-type: none"> <li>• Development of community/ recreation spaces</li> <li>• Development of festivals</li> <li>• Development of markets</li> <li>• Maintenance/Restoration/Upgrading of built environment in town</li> <li>• Streetscape enhancement</li> <li>• Tidy Towns</li> <li>• Other (please specify)</li> </ul> <p><b>Subtheme 1-4: Broadband</b></p> <ul style="list-style-type: none"> <li>• Action Plans / Feasibility Studies</li> <li>• Capacity Building / Training</li> <li>• Skills Development</li> <li>• Small scale equipment</li> <li>• Other (please specify)</li> </ul>
--	--

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<sup>2</sup> Appendix 2 provides further information on the categories for each project under all Sub-Themes along with definitions and examples for guidance.

## **Theme 2: Social Exclusion**

### **Subtheme 2-1: Basic Services Targeted at Hard-to-Reach Communities**

- Bereavement/Suicide-prevention Services
- Education/Training Skills Development
- Health
- Personal Support Services
- Recreational/Physical Amenities
- Retail/Financial Services
- Social/Community Amenities
- Transport
- Other (please specify)

### **Subtheme 2-2: Rural Youth**

- Access to IT
- Arts
- Sport/Recreation
- Youth Clubs / Cafés
- Youth Entrepreneurship
- Other (please specify)

## **Theme 3: Rural Environment**

### **Subtheme 3-1: Protection and sustainable use of water resources**

- Local Action Plans/Feasibility studies
- Technical Capacity Building/Training
- Water Conservation Education/Awareness
- Water Conservation Initiatives
- Other (please specify)

### **Subtheme 3-2: Protection and improvement of local bio-diversity**

- Biodiversity Protection Education/Awareness
- Environmental Improvement Initiatives
- Local Action Plans/Feasibility studies
- Other (please specify)

### **Subtheme 3-3: Development of renewable energy**

- Local Action Plans/Feasibility Studies
- Practical Sustainable Energy Initiatives
- Renewable Energy Education/Awareness
- Technical Capacity Building/Training
- Local Action Plans/Feasibility studies
- Other (please specify)

(4) **Next complete the following financial fields** with information from the application form.

<b>Total Project Cost *</b>	Total of estimated outlay cost and benefit in kind. Enter a numeric figure.
<b>Contribution in Kind*</b>	Contribution in Kind. Enter a numeric figure.
<b>Private Matching Funds*</b>	Private Match Funding amount. Enter a numeric figure. Please note, the Private Matching Funds field should <b>not include</b> any contribution in kind that may be provided by the promoter.
<b>Public Matching Funds*</b>	Public Match Funding amount. Enter a numeric figure. If populated the following field is mandatory.
<b>Source of Public Matching funding</b>	Choose from the list of values provided. Note: only one source can be populated.
<b>Total Funding Sources</b>	Total Funding Sources is the sum of Contribution in Kind plus Private Match Funds plus Public Matching Funds plus LEADER Grant Amount. Auto-populates.
<b>Minimum Funding Threshold *</b>	The Minimum Funding Threshold. Enter a numeric figure.
<b>LEADER Grant Amount *</b>	LEADER Grant Amount. Enter a numeric figure.
<b>LEADER Grant Amount Paid</b>	LEADER Grant Amount Paid is the total of all approved claims. Auto-populates.
<b>LEADER Grant Amount Remaining</b>	LEADER Grant Amount Remaining is the LEADER Grant Amount minus the LEADER Grant Amount Paid. Auto-populates.
<b>Total Claims Approved but not Paid</b>	Total Claims Approved but not Paid. Auto-populates.

(5) If the Project has Sub-Theme “2-1 Provision of basic services targeted at hard to reach communities”, then the following fields are populated. Otherwise they are not populated.

<b>Primary Target Group</b>	Choose: <ul style="list-style-type: none"> <li>• Children</li> <li>• Farmers on small holdings</li> <li>• Fishermen</li> <li>• Local Authority Tenants</li> <li>• Lone Parents</li> <li>• Long Term Unemployed people</li> <li>• Homeless individuals or those experiencing housing exclusion</li> <li>• Islanders</li> <li>• NEETS (Young People who are not in Employment, Education or Training)</li> <li>• Migrants or New Communities (including refugees or asylum seekers)</li> <li>• Older People</li> <li>• People living alone</li> <li>• People with a Disability</li> <li>• Roma</li> <li>• Small and Medium Enterprise Owner</li> <li>• Travellers</li> <li>• Under-employed people</li> <li>• Unemployed people</li> <li>• Women</li> <li>• Young People (15-35 Years)</li> <li>• Other (Please Specify)</li> </ul>
<b>Secondary Target Group</b>	Choose: <ul style="list-style-type: none"> <li>• Children</li> <li>• Farmers on small holdings</li> <li>• Fishermen</li> <li>• Local Authority Tenants</li> <li>• Lone Parents</li> <li>• Long Term Unemployed people</li> <li>• Homeless individuals or those experiencing housing exclusion</li> <li>• Islanders</li> <li>• NEETS (Young People who are not in Employment, Education or Training)</li> <li>• Migrants or New Communities (including refugees or asylum seekers)</li> <li>• Older People</li> <li>• People living alone</li> <li>• People with a Disability</li> <li>• Roma</li> <li>• Small and Medium Enterprise Owner</li> <li>• Travellers</li> <li>• Under-employed people</li> <li>• Unemployed people</li> <li>• Women</li> <li>• Young People (15-35 Years)</li> <li>• Other (Please Specify)</li> </ul>
<b>Other Target Group</b>	Free text

(6) Next complete the **Monitoring** questions below as appropriate:

Field	Options
Is this project improving basic services or infrastructure?*	Choose: <ul style="list-style-type: none"> <li>• Yes (If “Yes” the next question becomes mandatory)</li> <li>• No</li> </ul>
Indicate the population that will benefit from this service	Enter a whole number indicating the population.
Is this funding state aid under the “De Minimis” rule?*	Choose: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>
Is the project creating or sustaining jobs?*	Choose: <ul style="list-style-type: none"> <li>• Yes (If “Yes” the following two job questions are mandatory)</li> <li>• No</li> </ul>
Anticipated # of jobs created	The anticipated number of jobs to be created overall.
Anticipated # of jobs sustained	The anticipated number of jobs to be sustained overall.
Actual # of jobs created for 2016	The actual number of jobs created for 2016. Note this field is not mandatory. Note that if no jobs are created enter “0”.
Actual # of jobs sustained for 2016	The actual number of jobs sustained for 2016. Note this field is not mandatory. Note that if no jobs are sustained enter “0”.
Actual # of jobs created for 2017	The actual number of jobs created for 2017. Note that this field is not populated until the end of 2017.
Actual # of jobs sustained for 2017	The actual number of jobs sustained for 2017. Note that this field is not populated until the end of 2017.
Actual # of jobs created for 2018	The actual number of jobs created for 2018. Note that this field is not populated until the end of 2018.
Actual # of jobs sustained for 2018	The actual number of jobs sustained for 2018. Note that this field is not populated until the end of 2018.
Actual # of jobs created for 2019	The actual number of jobs created for 2019. Note that this field is not populated until the end of 2019.
Actual # of jobs sustained for 2019	The actual number of jobs sustained for 2019. Note that this field is not populated until the end of 2019.
Actual # of jobs created for 2020	The actual number of jobs created for 2020. Note that this field is not populated until the end of 2020.
Actual # of jobs sustained for 2020	The actual number of jobs sustained for 2020. Note that this field is not populated until the end of 2020.



(7) Note that if the response to the question “**Is the project creating or sustaining jobs?**” is **Yes** then the following fields become mandatory:

- **Anticipated # of jobs created**
- **Anticipated # of jobs sustained**

(8) The screen looks like this:

(9) Click the icon beside the **Anticipated # of jobs created** field to populate it.

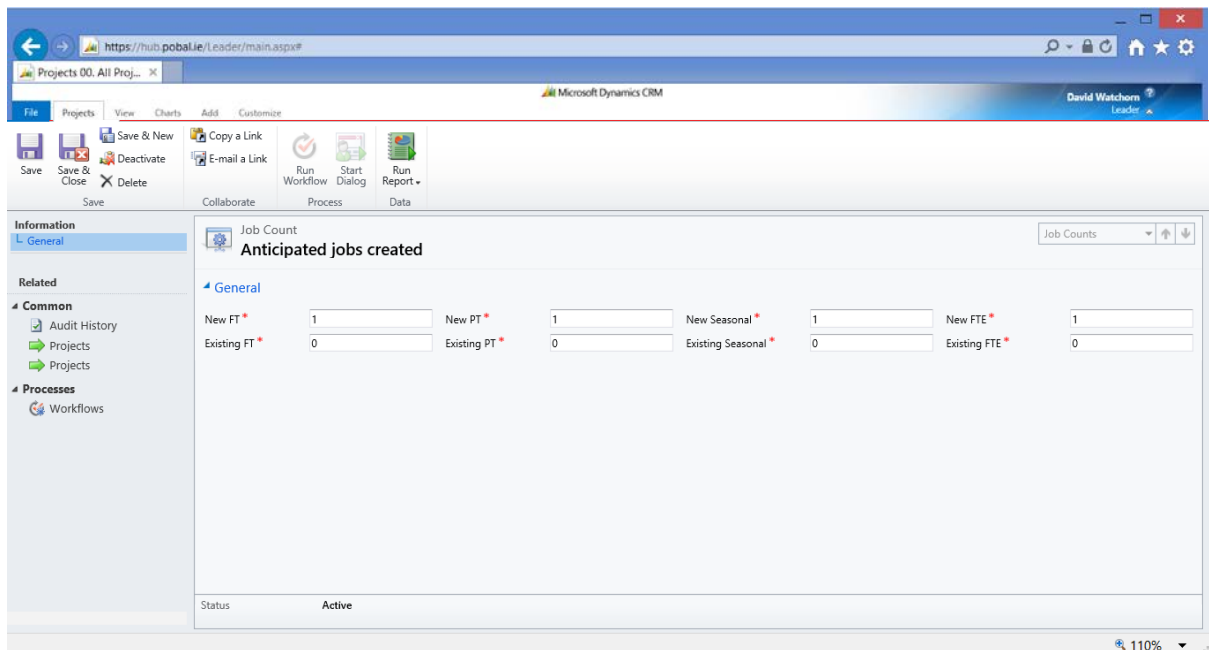
(10) The Anticipated Jobs Created form opens.

The screenshot shows the 'Anticipated jobs created' form in Microsoft Dynamics CRM. The form is titled 'Job Count' and 'Anticipated jobs created'. It has a 'General' tab selected. The form contains several input fields for job counts: New FT\*, Existing FT\*, New PT\*, Existing PT\*, New Seasonal\*, Existing Seasonal\*, New FTE\*, and Existing FTE\*. The status is 'Active'.

(11) Fill in the following mandatory fields to indicate direct jobs created (whole numbers only).  
If there are no jobs applicable to a particular field, then enter “0” to satisfy the mandatory requirement.

Field	Description
<b>New FT*</b>	Number of new Full-Time jobs.
<b>Existing FT*</b>	Number of existing Full-Time jobs.
<b>New PT*</b>	Number of new Part-Time jobs.
<b>Existing PT*</b>	Number of existing Part-Time jobs.
<b>New Seasonal*</b>	Number of new Seasonal jobs.
<b>Existing Seasonal*</b>	Number of existing Seasonal jobs.
<b>New FTE*</b>	Number of new Full-Time-Equivalent jobs.
<b>Existing FTE*</b>	Number of existing Full-Time-Equivalent jobs.

(12) The screen should now look like this:

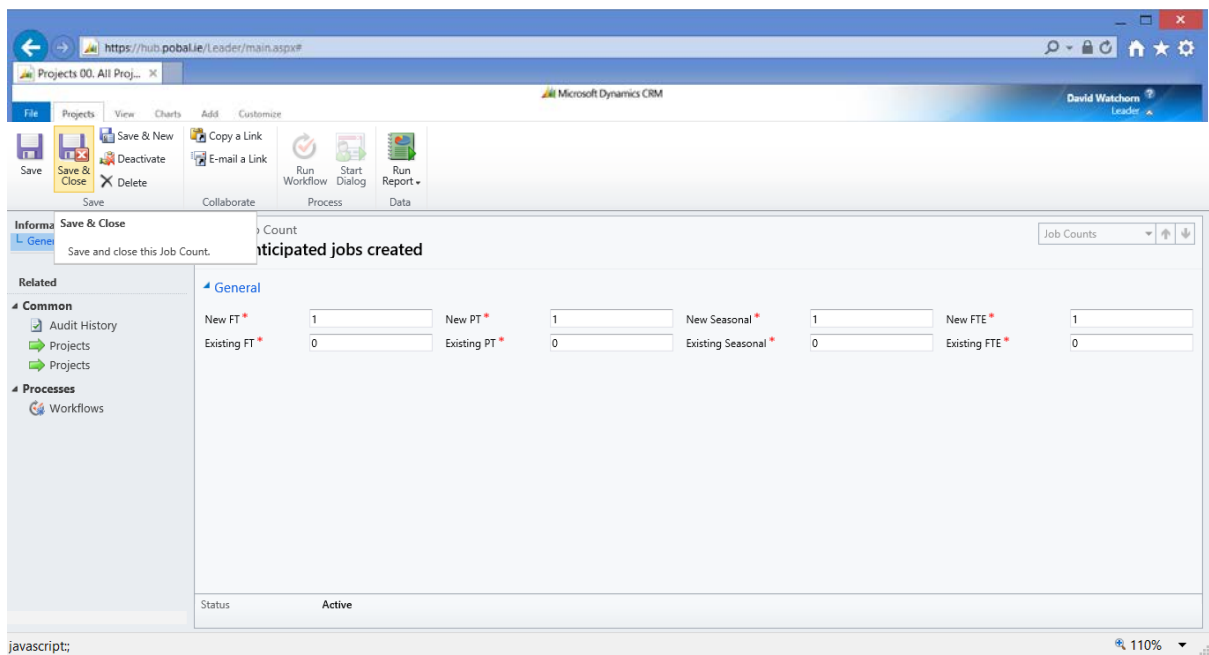


The screenshot shows the Microsoft Dynamics CRM interface for the 'Job Count' form. The browser address bar displays 'https://hub.poba.lie/leader/main.aspx#'. The left sidebar contains the 'Information' pane with 'General' selected, and a 'Related' section with 'Common' (Audit History, Projects) and 'Processes' (Workflows). The top ribbon includes 'File', 'Projects', 'View', 'Charts', 'Add', and 'Customize'. The 'File' ribbon has 'Save', 'Save & Close', and 'Delete'. The 'Projects' ribbon has 'Save & New', 'Copy a Link', 'E-mail a Link', 'Run Workflow', 'Start Dialog', and 'Run Report'. The main area is titled 'Job Count' with the subtitle 'Anticipated jobs created'. It features a 'Job Counts' dropdown and a 'General' section with input fields for 'New FT', 'Existing FT', 'New PT', 'Existing PT', 'New Seasonal', 'Existing Seasonal', 'New FTE', and 'Existing FTE'. The 'Status' field is set to 'Active'.

Field	Value
New FT *	1
Existing FT *	0
New PT *	1
Existing PT *	0
New Seasonal *	1
Existing Seasonal *	0
New FTE *	1
Existing FTE *	0

Status: Active

(13) Click **Save & Close**.



The screenshot shows the same Microsoft Dynamics CRM interface as the previous one, but with a 'Save & Close' dialog box open. The dialog box has the title 'Save & Close' and the message 'Save and close this Job Count.' The 'File' ribbon now highlights the 'Save & Close' button. The main area remains the same, showing the 'Job Count' form with the 'General' section and input fields. The 'Status' field is still 'Active'.

Field	Value
New FT *	1
Existing FT *	0
New PT *	1
Existing PT *	0
New Seasonal *	1
Existing Seasonal *	0
New FTE *	1
Existing FTE *	0

Status: Active

(14) The screen should now look like this. The figures entered are now saved and available as a **linked record** i.e. one can click the link to view the record.

The screenshot shows the Microsoft Dynamics CRM interface for a project named 'Green Earth Organics'. The left sidebar contains navigation links for 'Project Basic', 'General', 'Questions', 'Dates', 'Reasons & Notes', 'Art 48 Application Ch...', and 'Financials'. The main area displays the 'Questions' section with several dropdown menus and text fields. A red callout box points to the 'Anticipated jobs created' field, indicating it is a linked record.

(15) Repeat the process for the **Anticipated # of jobs sustained** field.

(16) Finally add the **Application Submitted Date**:

<b>Application Submitted Date*</b>	The date the application is submitted. This is the date it is progressed to Stage 03 Application Submitted.
------------------------------------	---

(17) The project record should now look like this:

The screenshot shows the Microsoft Dynamics CRM interface for a project record titled 'Green Earth Organics'. The browser address bar shows 'https://hub.pobal.ie/Leader/main.aspx#'. The left sidebar contains navigation links for 'Project Basic' (General, Questions, Dates, Reasons & Notes, Art 48 Application Ch..., Financials), 'Related' (Common: Documents, Audit History, Claims for this Project, Cooperation Partners..., Pobal/Dept Internal N..., Stage Audits, Checklist Responses f...), and 'Processes' (Workflows). The main content area is divided into several sections:

- General:**
  - Project Ref ID: 01WCIP100000103
  - Promoter Name: Taste of Mallow
  - LAG: West Cork LPI (do not edit)
  - LDS: West Cork LDS (do not edit)
  - Indicative Grant Amount: €100,000.00
  - Gaeltacht Area: No
  - Is this an Enterprise? No
  - Assignee: IPUSER03 West Cork (do not edit)
  - Stage: 02. EOY Eligible
  - LAG Ref ID: IP1000
  - Call Type: [Dropdown]
  - Island Area? No
  - Enterprise Type: Medium
  - New or Existing Enterprise? New
  - Project Name: Green Earth Organics
  - Description: This project is for a new organic food supermarket in Mallow.
- Primary Local Objective:**
  - Primary Local Objective: West Cork LDS/Enterprise Development
  - Theme: Rural Economic Development, Enterprise Development And Job Creation
  - Sub Theme: Enterprise Development
  - Sector/initiative: Social Enterprise
  - Project Type: Capital
  - Maximum Funding: €200,000.00
  - Project Sub-Type: N/A
  - Approved by Dept: No
  - Primary Target Group: [Dropdown]
  - Other Target Group: [Dropdown]
  - Applicant Type: Private
  - Maximum Rate of Aid %: 50
  - Source of Public Matching funding: [Dropdown]
  - Date of Approval: [Dropdown]
  - Secondary Target Group: [Dropdown]
- Questions:**
  - Is this project improving basic services/ infrastructure? No
  - Indicate the population that will benefit from this service: [Text Area]
  - Is this funding state aid under the "de minimis" rule? No
  - Is this project creating or sustaining jobs? Yes
  - # of jobs created/sustained: [Text Area]
  - Anticipated # of jobs created: Anticipated jobs created
  - Actual # of jobs created for 2016: [Text Area]
  - Actual # of jobs created for 2017: [Text Area]
  - Actual # of jobs created for 2018: [Text Area]
  - Actual # of jobs created for 2019: [Text Area]
  - Actual # of jobs created for 2020: [Text Area]
  - Anticipated # of jobs sustained: [Text Area]
  - Actual # of jobs sustained for 2016: [Text Area]
  - Actual # of jobs sustained for 2017: [Text Area]
  - Actual # of jobs sustained for 2018: [Text Area]
  - Actual # of jobs sustained for 2019: [Text Area]
  - Actual # of jobs sustained for 2020: [Text Area]
- Dates:**
  - Date EOI Received: 13/02/2017
  - Date Application Submitted by LAG: 03/01/2017
  - Evaluation Committee Date: [Text Area]
  - Board Approval Date: [Text Area]
  - Status: Active

(18) If the Project Subtype is a Cooperation Project then add the Cooperation Partner.  
If it is not a Cooperation Project please proceed to Point 28.

- Note that for a Cooperation Project, the Promoter Type field on the Promoter record must be “LAG”.
- If you select a Cooperation Project the Cooperation Partner Subgrid appears:

The screenshot shows the Microsoft Dynamics CRM interface for a project named 'Green Earth Organics'. The 'Project Sub-Type' is 'Co-operation Transnational Full Project'. The 'Cooperation Partners / Linked Projects' subgrid is visible, showing a table with columns for project type and name. A red arrow points to the 'Co-operation LA...' link in the first row of the subgrid.

(19) Click inside the Cooperation Partner subgrid.

The screenshot shows the same Microsoft Dynamics CRM interface. A red arrow points to the 'Cooperation Partners / Linked Projects' subgrid. A red box with the text 'This is the Cooperation Partner subgrid.' points to the subgrid.

(20) Click **Add New Cooperation Partner / Linked Record**.

The screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar includes 'File', 'Projects', 'View', 'Charts', 'Add', and 'Customize'. The 'Add' tab is active, showing a ribbon with options like 'Delete Cooperation Partner / Linked Project', 'Copy a Link', 'E-mail a Link', 'Filter', 'Save Filters', 'Set As Default View', 'Chart Pane', 'Run Workflow', 'Start Dialog', 'Run Report', and 'Export Cooperation Partners / Linked Projects'. A red arrow points to the 'Add New Cooperation Partner / Linked Project' button in the ribbon. The main form is titled 'Add New Cooperation Partner / Linked Project' and is for the 'Project' record 'Green Earth Organics'. The form includes fields for 'Project Sub-Type' (set to 'Co-operation Transnational Full Project'), 'Actual Rate of Aid %' (0.00), 'Date of Approval', 'Source of Public Matching funding', 'Primary Target Group', and 'Secondary Target Group'. A table below these fields shows a list of related records, but it is currently empty, displaying the message 'No Cooperation Partner / Linked Project records are available in this view.' The status bar at the bottom indicates 'Status: Active'.

(21) The Cooperation Partner / Linked Project form opens:

The screenshot shows the 'Cooperation Partner / Linked Project' form in Microsoft Dynamics CRM. The top navigation bar includes 'File', 'Cooperation Partner / Linked Project', 'Save & New', 'Copy a Link', 'E-mail a Link', 'Run Workflow', 'Start Dialog', and 'Run Report'. The 'Save & New' tab is active, showing a ribbon with options like 'Save', 'Save & Close', 'Delete', 'Copy a Link', 'E-mail a Link', 'Run Workflow', 'Start Dialog', and 'Run Report'. The main form is titled 'Cooperation Partner / Linked Project' and is for the 'New' record. The form includes fields for 'Co-operation Member State', 'Co-operation Member State', 'Linked Project ID', and 'Linked Project Name'. A red arrow points to the 'Cooperation Partner/Linked Project' link in the left-hand navigation pane. A red callout box with the text 'This is the Cooperation Partner / Linked Project form' points to the main form area. The status bar at the bottom indicates 'Status: Active'.

(22) Click the **Cooperation Member State** lookup icon.

Cooperation Partner / Linked Project - Microsoft Dynamics CRM - Internet Explorer

https://pobaluat.pobal.ie/LeaderUAT2/main.aspx?etc=10090&extraqs=%3fetc%3d10090%26ldr\_leaderproject%3d%257b9A63840C-53F9-E611-9476-005056B8C12F5%257d%26ldr\_projectpartnertype

File Cooperation Partner / Linked Project

Save Save & New Save & Close Delete Copy a Link E-mail a Link Run Workflow Start Dialog Run Report -

Information Cooperation Partner/...

Related

Common Audit History

Processes Workflows

Cooperation Partner / Linked Project

New

Co-operation Member State

Co-operation Member State

Linked Project ID

Linked Project Name

Status Active

https://pobaluat.pobal.ie/LeaderUAT2/userdefined/edit.aspx?etc=10090&ldr\_leaderproject=%7b9A63840C-53F9-E611-9476-005056B8C12F5%7d&ldr\_projectpartnertype=753280001&page 105%

(23) Select the **Country** and click **OK**.

Look Up Record-- Web page Dialogue

https://pobaluat.pobal.ie/LeaderUAT2/\_controls/lookup/lookupinfo.aspx?AllowFilterC

Look Up Record

Enter your search criteria and click Search to find matching records. Filter your results and view different columns of data by using the View options. Then, select the record you want and click OK.

Look for: Country

View: \_Country Lookup View

Search: Search for records

Show Only My Records

Name	Created On
<input type="checkbox"/> Poland	30/11/2016 16:32
<input type="checkbox"/> Portugal Islands and Madeira Islands	30/11/2016 16:32
<input type="checkbox"/> Republic of Cyprus	30/11/2016 16:32
<input type="checkbox"/> Romania	30/11/2016 16:32
<input type="checkbox"/> Slovakia	30/11/2016 16:32
<input type="checkbox"/> Slovenia	30/11/2016 16:32
<input checked="" type="checkbox"/> Spain	30/11/2016 16:32
<input type="checkbox"/> Sweden	30/11/2016 16:32
<input type="checkbox"/> UK - England	30/11/2016 16:32
<input type="checkbox"/> UK - Northern Ireland	30/11/2016 16:32
<input type="checkbox"/> UK - Scotland	30/11/2016 16:32
<input type="checkbox"/> UK - Wales	30/11/2016 16:32

1 - 33 of 33 (1 selected)

Page 1

Properties New

OK Remove Value

https://pobaluat.po Internet | Protected Mode: Off

(24) The value populates in the Cooperation Member State field.

Cooperation Partner / Linked Project - Microsoft Dynamics CRM - Internet Explorer

https://pobaluat.pobal.ie/LeaderUAT2/main.aspx?etc=10090&extraqs=%3fetc%3d10090%26ldr\_leaderproject%3d%257b9A63840C-53F9-E611-9476-0050568C12F5%257d%26ldr\_projectpartnertype

File Cooperation Partner / Linked Project

Save Save & New Save & Close Delete Copy a Link E-mail a Link Run Workflow Start Dialog Run Report ..

Information Cooperation Partner/...

Related Common Audit History Processes Workflows

Cooperation Partner / Linked Project New

Cooperation Partner/Linked Project

Co-operation Member State Spain

Co-operation Member State

Linked Project ID \* Linked Project Name

Status Active

(25) Add the relevant **Linked Project ID** and **Linked Project Name** of the cooperation project from the particular Member State.

Cooperation Partner / Linked Project - Microsoft Dynamics CRM - Internet Explorer

https://pobaluat.pobal.ie/LeaderUAT2/main.aspx?etc=10090&extraqs=%3fetc%3d10090%26ldr\_leaderproject%3d%257b9A63840C-53F9-E611-9476-0050568C12F5%257d%26ldr\_projectpartnertype

File Cooperation Partner / Linked Project

Save Save & New Save & Close Delete Copy a Link E-mail a Link Run Workflow Start Dialog Run Report ..

Information Cooperation Partner/...

Related Common Audit History Processes Workflows

Cooperation Partner / Linked Project New

Cooperation Partner/Linked Project

Co-operation Member State Spain

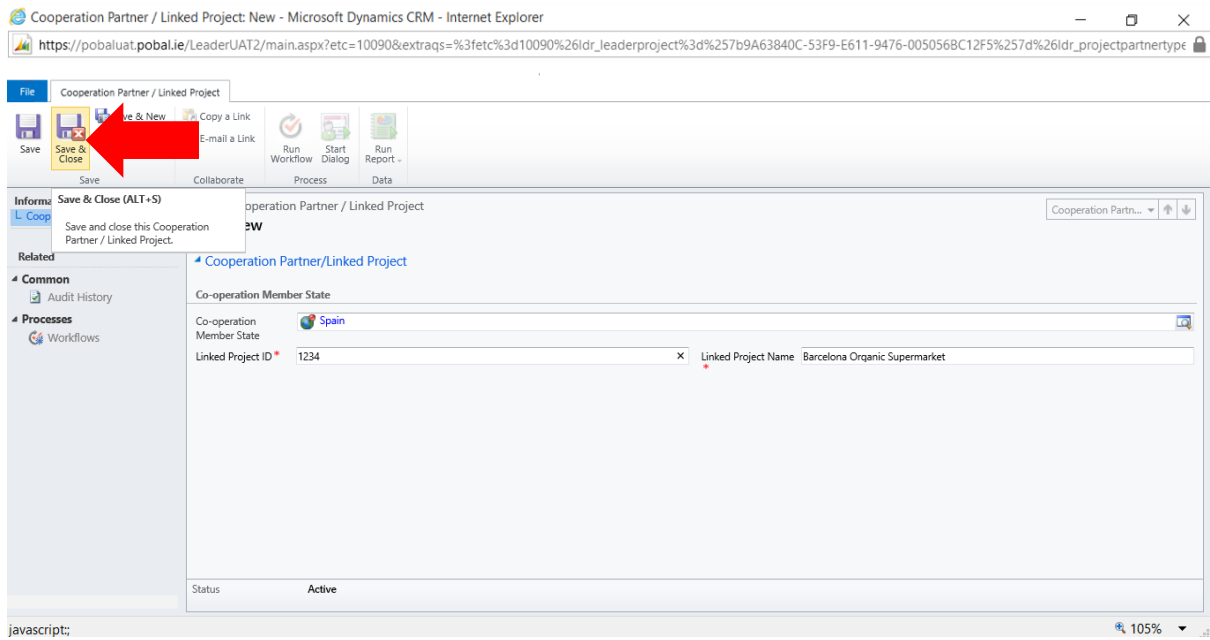
Co-operation Member State

Linked Project ID \* 1234

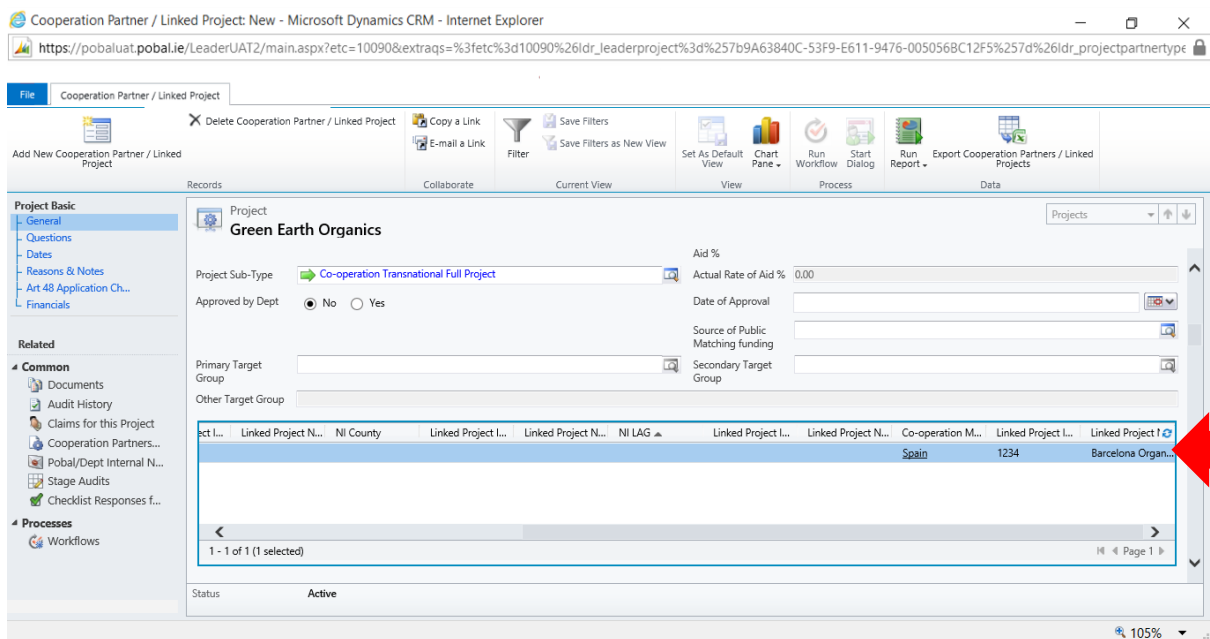
Linked Project Name Barcelona Organic Supermarket

Status Active

(26) Click **Save & Close**.



(27) The saved record appears in the Cooperation Partner subgrid.



**Note:**

The above example is for a Full Transnational Cooperation Project. Here are different fields relevant to all the different kinds of Cooperation Projects:

Field	Options
<b>Cooperation Member State*</b>	Choose: <ul style="list-style-type: none"><li>• Yes (If “Yes” the following two questions are mandatory)</li><li>• No</li></ul>
<b>Cooperation NI County*</b>	Choose from the list of Northern Ireland (NI) counties presented.
<b>Cooperation LAG*</b>	The Cooperation Project Partner organisation name where it is a LAG.
<b>Cooperation Non LAG</b>	The Cooperation Project Partner organisation name where it is not a LAG.
<b>Linked Project ID*</b>	Linked Project Reference
<b>Linked Project Name*</b>	Linked Project Name

(28) Upload any relevant documents to the Documents folder.

The screenshot shows the Microsoft Dynamics CRM interface for a project named 'Green Earth Organics'. The left-hand navigation pane is expanded, showing the 'Related' section. A red arrow points to the 'Documents' link under the 'Common' category. The main form displays various fields for the project, including Project Ref ID, Promoter Name, LAG, LDS, Indicative Grant Amount, and Assignee.

(29) The LAG Project User or LAG User now progresses to the relevant Stage. Click the **Stage** lookup icon.

The screenshot shows the same Microsoft Dynamics CRM interface for the 'Green Earth Organics' project. A red arrow points to the 'Stage' field, which contains the value '02. EOI Eligible'. The 'Stage' field has a small icon next to it, which is the lookup icon mentioned in the text.

(30) Choose **03 Application Submitted** and click **OK**.

Look Up Record -- Webpage Dialog

Enter your search criteria and click Search to find matching records. Filter your results and view different columns of data by using the View options. Then, select the record you want and click OK.

Look for: Project Stage ☐ Show Only My Records

View: Possible project Stages

Name
<input type="checkbox"/> 01. EOI Submitted
<input type="checkbox"/> 02. EOI Eligible
<input checked="" type="checkbox"/> 03. Application Submitted
<input type="checkbox"/> 16. EOI/Project Withdrawn
<input type="checkbox"/> 18. EOI Ineligible

1 - 5 (1 selected) Page 1

Properties New

OK Remove Value

(31) Click **Save** to save the record with new Stage applied.

Microsoft Dynamics CRM

Save (CTRL+S)

Save this Project.

Project: Green Earth Organics

Project Ref ID: 01WCIP100000183

Promoter Name: Taste of Mallow

LAG: West Cork IP1 (do not edit)

LDS: West Cork LDS (do not edit)

Indicative Grant Amount: €100,000.00

Gaeltacht Area? ☒ No ☐ Yes

Is this an Enterprise? ☐ No ☒ Yes

Assignee: IPUSER03 West Cork (do not edit)

Stage: 03. Application Submitted

LAG Ref ID: IP1000

Call Type:

Island Area? ☒ No ☐ Yes

Enterprise Type: Medium

New or Existing Enterprise? New

Project Description:

Project Name: Green Earth Organics

Description: This project is for a new organic food supermarket in Mallow.

Status: Active

(32) The project is now at **Stage 03 Application Submitted**.



**Notes:**

- The project is now at **Stage 03 Application Submitted**.
- The project can be progressed to **Stage 04 Application Public Procurement Checks**
- The project can be progressed to **Stage 16 EOI or Project Withdrawn** if it is withdrawn.
- The project can be progressed to **Stage 17 Project Rejected** if it is rejected.
- The project can be reversed to **Stage 02 EOI Submitted** if existing information needs to be edited.

## Stage 03

### Application Submitted

#### Overview

Stage	LAG Project User	LAG User	LAG Manager	Article 48 User	Article 48 Manager	Can Progress To Stage
<b>03 Application Submitted</b> Progress the project to "04 Application Public Procurement Checklist"	LAG Project User	LAG User				↓ 04 ↓ 16 ↓ 17

Stage 03 Application Submitted is a simple step where the LAG Project User or LAG User reviews the project information entered so far and if satisfied, progresses the project to **Stage 04 Application Public Procurement Checklist** for the first set of checklist questions. Alternatively the project is reversed by the LAG Project User or LAG User to Stage 02 EOI Eligible for amending.

#### Process

- (1) The LAG Project User or LAG User opens the project which is at **Stage 03 Application Submitted**.
- (2) The LAG Project User or LAG User reviews the project information entered so far and if satisfied progresses the project. Click the **Stage lookup icon**.

The screenshot shows the Microsoft Dynamics CRM interface for a project named "Green Earth Organics". The form is in the "General" tab. The "Stage" field is set to "03. Application Submitted". A red arrow points to the "Stage" field, indicating the "Stage lookup icon" mentioned in the process description.

Project: Green Earth Organics

Project Ref ID: 01W/CIP100000183

Promoter Name: Taste of Mallow

LAG: West Cork IP1 (do not edit)

LDS: West Cork LDS (do not edit)

Indicative Grant Amount: €100,000.00

Gaeltacht Area? ☐ No ☐ Yes

Is this an Enterprise? ☐ No ☒ Yes

Assignee: IPUSER03 West Cork (do not edit)

Stage: 03. Application Submitted

LAG Ref ID: IP1000

Call Type: [Dropdown]

Island Area? ☒ No ☐ Yes

Enterprise Type: Medium

New or Existing Enterprise: New

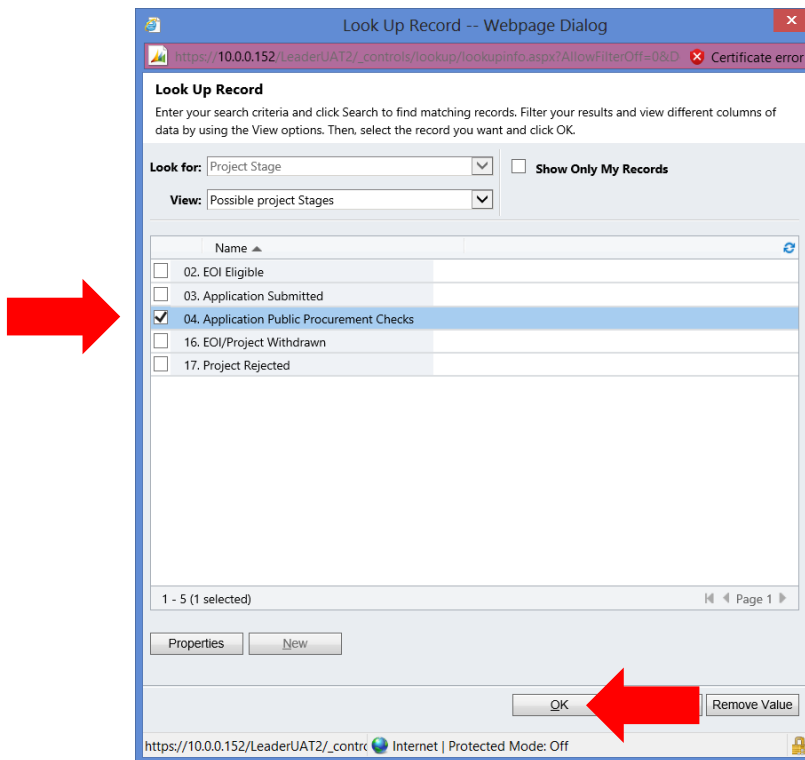
Project Description:

Project Name: Green Earth Organics

Description: This project is for a new organic food supermarket in Mallow.

Status: Active

(3) Choose **04 Application Public Procurement Checks** and click **OK**.



**Look Up Record**  
Enter your search criteria and click Search to find matching records. Filter your results and view different columns of data by using the View options. Then, select the record you want and click OK.

Look for:  ☐ Show Only My Records

View:

Name
<input type="checkbox"/> 02. EOI Eligible
<input type="checkbox"/> 03. Application Submitted
<input checked="" type="checkbox"/> 04. Application Public Procurement Checks
<input type="checkbox"/> 16. EOI/Project Withdrawn
<input type="checkbox"/> 17. Project Rejected

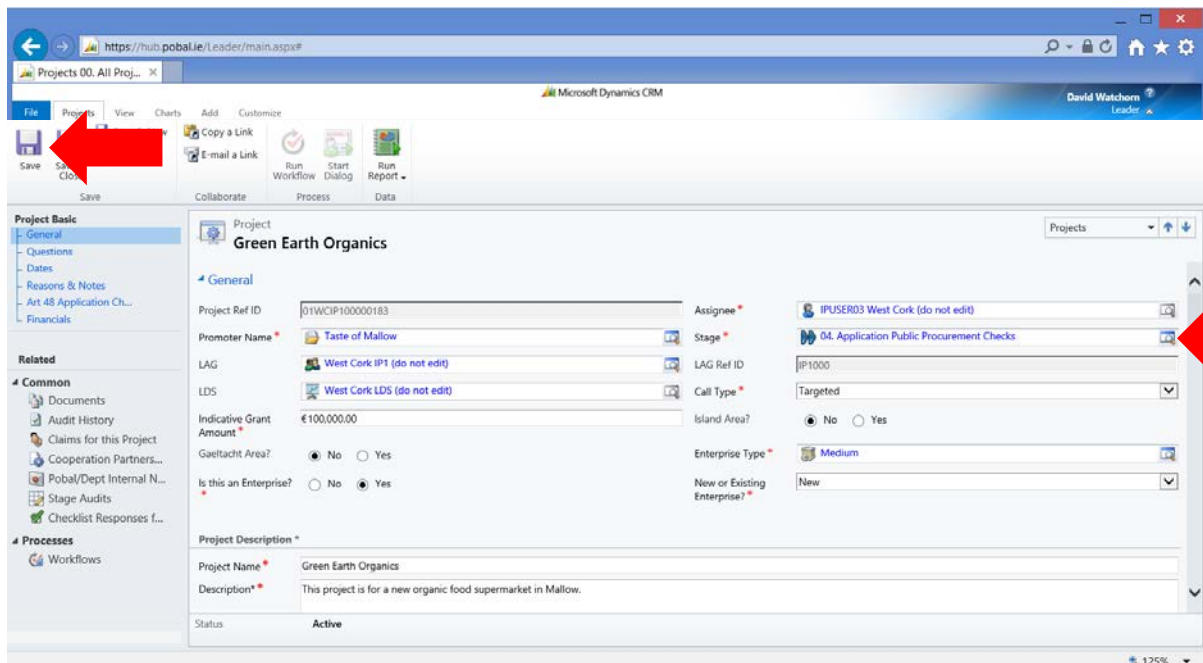
1 - 5 (1 selected) Page 1

Properties New

OK Remove Value

https://10.0.0.152/LeaderUAT2/\_cont... Internet | Protected Mode: Off

(4) The stage updates to **04 Application Public Procurement Checks**. Click **Save** to save the record.



Microsoft Dynamics CRM

Project: **Green Earth Organics**

**General**

Project Ref ID: 01W/CIP100000183 Assignee: IPUSER03 West Cork (do not edit)

Promoter Name: Taste of Mallow Stage: 04. Application Public Procurement Checks

LAG: West Cork IP1 (do not edit) LAG Ref ID: IP1000

LDS: West Cork LDS (do not edit) Call Type: Targeted

Indicative Grant Amount: €100,000.00 Island Area? ☒ No ☐ Yes

Gaeltacht Area? ☒ No ☐ Yes Enterprise Type: Medium

Is this an Enterprise? ☐ No ☒ Yes New or Existing Enterprise: New

Project Description:

Project Name: Green Earth Organics

Description: This project is for a new organic food supermarket in Mallow.

Status: Active

## Stage 04

### Application Public Procurement Checks

#### Overview

Stage	LAG Project User	LAG User	LAG Manager	Article 48 User	Article 48 Manager	Can Progress To Stage
<b>04 Application Public Procurement Checklist</b> Answer the Public Procurement checklist questions and progress to "05 Application LAG User Sign Off".	LAG Project User	LAG User				↓ 05 ↓ 16 ↓ 17

Stage 04 involves the completion of a set of Public Procurement questions by the LAG Project User or LAG User. This is the first batch of Article 48 checklist questions for the project. There are 60 questions to be answered in this batch. Once complete the project can be progressed to **Stage 05 Application LAG User Sign-off**. Alternatively the project is reversed by the LAG Project User or LAG User to Stage 03 Application Submitted for amending.

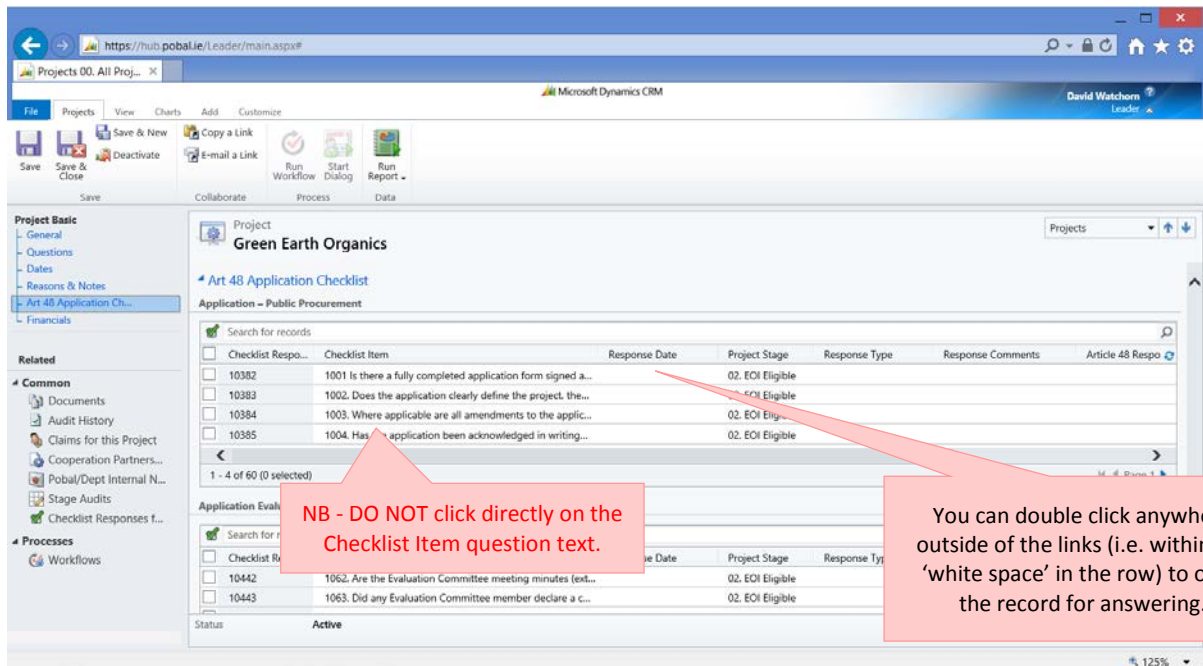
#### Process

- (1) The LAG Project User or LAG User opens the project which is at **Stage 04 Application Public Procurement Checks**.

The screenshot displays the Microsoft Dynamics CRM interface for a project named 'Green Earth Organics'. The 'Project Basic' section is active, showing various fields for project details. The 'Stage' field is set to '04. Application Public Procurement Checks', which is highlighted by a red arrow. Other visible fields include 'Project Ref ID', 'Promoter Name', 'LAG', 'LDS', 'Indicative Grant Amount', 'Gaeltacht Area?', 'Is this an Enterprise?', 'Assignee', 'Stage', 'LAG Ref ID', 'Call Type', 'Island Area?', 'Enterprise Type', 'New or Existing Enterprise?', 'Project Description', 'Project Name', and 'Status'.

(2) We are now ready to start answering the checklist questions.

(3) The LAG Project User or LAG User **navigates to the Application Public Procurement checklist questions section of the project record:**



Project: Green Earth Organics

Art 48 Application Checklist

Application - Public Procurement

Checklist Respo...	Checklist Item	Response Date	Project Stage	Response Type	Response Comments	Article 48 Respo
<input type="checkbox"/>	10382	1001 Is there a fully completed application form signed a...	02: EOI Eligible			
<input type="checkbox"/>	10383	1002. Does the application clearly define the project, the...	02: EOI Eligible			
<input type="checkbox"/>	10384	1003. Where applicable are all amendments to the applic...	02: EOI Eligible			
<input type="checkbox"/>	10385	1004. Has the application been acknowledged in writing...	02: EOI Eligible			

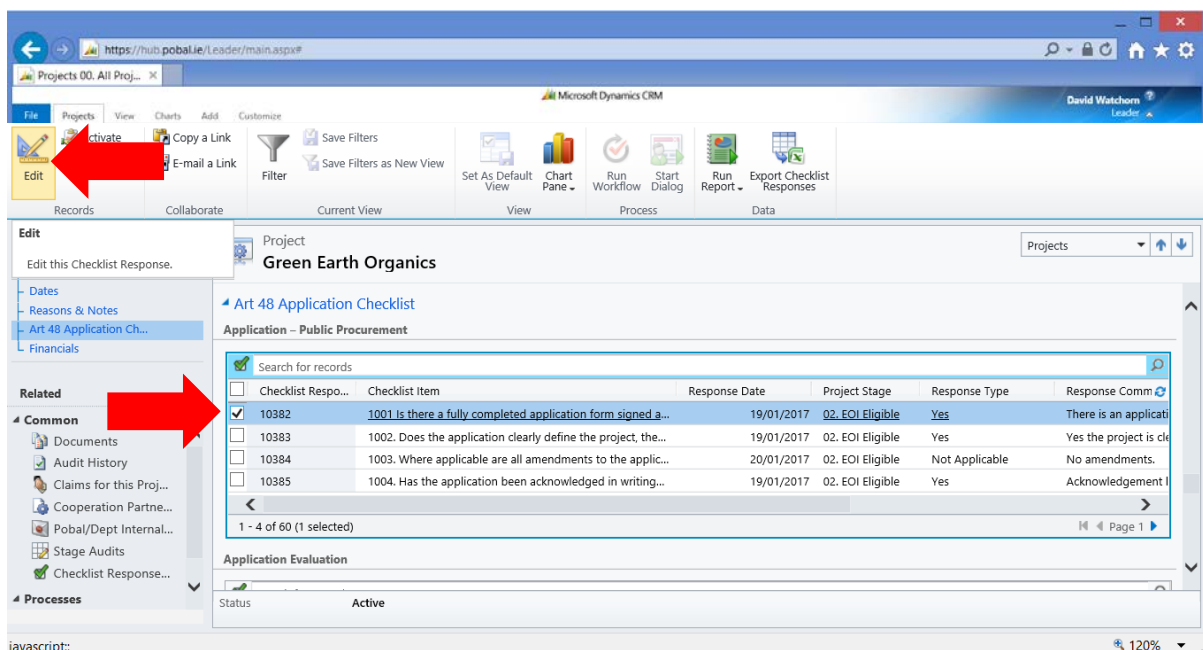
1 - 4 of 60 (0 selected)

Application Evaluation

Status: Active

**Important:** When opening Checklist items do not click directly on the Checklist Item question text. This will open a screen used for editing the question text. You will not be able to answer the question from there.

(4) Put a **check beside a question** and click **Edit** to open it or highlight the question and double-click on the blue area.



Project: Green Earth Organics

Art 48 Application Checklist

Application - Public Procurement

Checklist Respo...	Checklist Item	Response Date	Project Stage	Response Type	Response Comm	
<input checked="" type="checkbox"/>	10382	1001 Is there a fully completed application form signed a...	19/01/2017	02: EOI Eligible	Yes	There is an applicati...
<input type="checkbox"/>	10383	1002. Does the application clearly define the project, the...	19/01/2017	02: EOI Eligible	Yes	Yes the project is cl...
<input type="checkbox"/>	10384	1003. Where applicable are all amendments to the applic...	20/01/2017	02: EOI Eligible	Not Applicable	No amendments.
<input type="checkbox"/>	10385	1004. Has the application been acknowledged in writing...	19/01/2017	02: EOI Eligible	Yes	Acknowledgement I...

1 - 4 of 60 (1 selected)

Application Evaluation

Status: Active

(5) The Checklist Response form opens.

The screenshot shows the Microsoft Dynamics CRM interface for a 'Checklist Response' record with ID 10382. The record is owned by 'IPUSER03 West Cork (do not edit)'. The 'General' tab is active, showing fields for 'Checklist Response ID' (10382), 'Project' (Green Earth Organics), and 'Type of Project Checklist' (Application Form). Below these is a 'Check List Item' section with a green checkmark and the text '1001 Is there a fully completed application form signed and dated by the applicant on the file?'. The 'Response' section has fields for 'Response Type', 'Response Date', and 'Response Comments'. The status is 'Active'. A red arrow points to the 'Checklist Response' title at the top of the form.

(6) Click the **Response Type** lookup icon to record a response to the specific question.

This screenshot is identical to the one above, but with a red arrow pointing to the 'Response Type' lookup icon (a small icon with a magnifying glass) in the 'Response' section. The 'Response Type' field is currently empty.

- (7) The Response Type Lookup box opens with the following options: Yes; No; Not Applicable.

The screenshot shows a web browser window titled "Look Up Record -- Webpage Dialog". The address bar shows a URL with a "Certificate error". The main content area has a "Look Up Record" section with instructions: "Enter your search criteria and click Search to find matching records. Filter your results and view different columns of data by using the View options. Then, select the record you want and click OK." Below this are three dropdown menus: "Look for:" (set to "Response Type"), "View:" (set to "Response Type Lookup View"), and "Search:" (with a search icon). To the right is a checkbox labeled "Show Only My Records". Below these is a table with three columns: "Name", "Checklist Response Type", and "Created On". The table contains three rows: "No", "Not Applicable", and "Yes", all with "LAG Response" as the response type and "09/02/2016 13" as the creation date. At the bottom are buttons for "Properties", "New", "OK", "Cancel", and "Remove Value".

Name	Checklist Response Type	Created On
<input type="checkbox"/> No	LAG Response	09/02/2016 13
<input type="checkbox"/> Not Applicable	LAG Response	09/02/2016 13
<input type="checkbox"/> Yes	LAG Response	09/02/2016 13

- (8) Choose the appropriate response (Yes, No or Not Applicable) and click OK.



This screenshot is identical to the previous one, but with the "Yes" option in the table selected (checked). Additionally, a red arrow points to the "OK" button at the bottom right of the dialog. The status bar at the bottom indicates "1 - 3 of 3 (1 selected)" and "Page 1".

Name	Checklist Response Type	Created On
<input type="checkbox"/> No	LAG Response	09/02/2016 13
<input type="checkbox"/> Not Applicable	LAG Response	09/02/2016 13
<input checked="" type="checkbox"/> Yes	LAG Response	09/02/2016 13

- (9) Complete the **Response Comments** box if desired. Note it is not mandatory to complete this. Then press **Save & Close**.

The screenshot shows the 'Checklist Response' form in Microsoft Dynamics CRM. The form is for 'Checklist Response 10382' and is associated with the project 'Green Earth Organics'. The 'Response' section shows a 'Response Type' of 'Yes' and a 'Response Comments' field with the text 'There is an application form on file signed by the Promoter.' A red arrow points to the 'Save & Close' button in the top ribbon. Another red arrow points to the 'Response Comments' field, with a callout box stating 'You may enter a comment here if relevant.' The status is 'Active'.

- (10) The record saves and the response details are visible in the relevant columns within the sub grid – see example below.

The screenshot shows the 'Project Basic' form for 'Green Earth Organics'. The form displays a sub-grid of 'Art 48 Application Checklist' items. A red arrow points to the 'Response Comments' column in the sub-grid, which contains the text 'There is an application for...'. The status is 'Active'.

Checklist Item	Response Date	Response Type	Response Comments	Article	Created On
1001. Application Form - Is there a fully completed applic...	19/01/17	Yes	There is an application for...		18/01/17 21:34
1002. Application Form - Does the application clearly defi...					
1003. Application Form - Where applicable, are all amend...					
1004. Application Form - Has the application been ackno...					
1005. Application Form - Have all documents been date s...					
1006. Eligibility - Is the beneficiary eligible in accordance...					
1007. Eligibility - Is the project eligible under the Theme...					
1008. Financing/ Viability - Has confirmation of matching...					
1009. Financing/ Viability - Are matching funds eligible?					
1010. Financing/ Viability - Is the project financially sustal...					
1011. Financing/ Viability - Has a business plan/marketing...					
1012. Financing/ Viability - If VAT has been included in th...					
1013. Financing/ Viability -Have management accounts or...					

(11) **Repeat the process for the remaining Application Public Procurement Checklist questions.**  
Please note, that all questions must be answered but not necessarily in one sitting. Once you save and exit the checklist you will be able to continue the next time you access it.

(12) **The screen should now look like this.**

Project Basic

General

Questions

Dates

Reasons & Notes

Art 48 Application Checklist

Financials

Related

Common

Documents

Audit History

Claims for this Project

Cooperation Partners...

Pobal/Dept Internal N...

Stage Audits

Checklist Responses f...

Processes

Workflows

Dialog Sessions

Project

Green Earth Organics

Art 48 Application Checklist

Application - Public Procurement

Search for records

Checklist Item	Response Date	Response Type	Response Comments	Article 48 Response	Verification Comments	Created On
1001. Application Form - Is there a fully completed applic...	19/01/17	Yes	There is an application for...			18/01/17 21:34
1002. Application Form - Does the application clearly defi...	19/01/17	Yes	Yes the project is de...			18/01/17 21:34
1003. Application Form - Where applicable, are all amend...	25/01/17	Yes	No amendments.			18/01/17 21:34
1004. Application Form - Has the application been ackno...	19/01/17	Yes	Acknowledgement letter s...			18/01/17 21:34
1005. Application Form - Have all documents been date s...	20/01/17	Yes				
1006. Eligibility - Is the beneficiary eligible in accordance...	20/01/17	Yes				
1007. Eligibility - Is the project eligible under the Theme...	20/01/17	Yes				
1008. Financing/ Viability - Has confirmation of matching...	20/01/17	Yes				
1009. Financing/ Viability - Are matching funds eligible?	20/01/17	Yes				
1010. Financing/ Viability - Is the project financially sustai...	20/01/17	Yes				
1011. Financing/ Viability - Has a business plan/marketing...	20/01/17	Yes				18/01/17 21:34
1012. Financing/ Viability - If VAT has been included in th...	20/01/17	Yes				18/01/17 21:34
1013. Financing/ Viability -Have management accounts or...	20/01/17	Yes				18/01/17 21:34

Status: Active

(13) **Upload any relevant documents to the Documents folder.**

Project Basic

General

Questions

Dates

Reasons & Notes

Art 48 Application Checklist

Financials

Related

Common

Documents

Audit History

Claims for this Project

Cooperation Partners...

Pobal/Dept Internal N...

Stage Audits

Checklist Responses f...

Processes

Workflows

Project

Green Earth Organics

General

Project Ref ID: 01WCI100000183

Assignee: IPUSER03 West Cork (do not edit)

Promoter Name: Taste of Mallow

Stage: 02: EOI Eligible

LAG: West Cork IP1 (do not edit)

LAG Ref ID: IP1000

Call Type: [Dropdown]

Indicative Grant Amount: €100,000.00

Island Area: No (selected)

Gaeltacht Area: No (selected)

Is this an Enterprise? No (selected)

Project Description:

Project Name: Green Earth Organics

Description: This project is for a new organic food supermarket in Mallow.

- (14) When all Application Public Procurement Questions have been answered, the project is progressed by updating the **Stage**. Click the **Stage Lookup** icon, choose **05 Application IP Manager or LAG User Sign-off** and click **OK**. The value in the Stage field updates. Click **Save**.

The screenshot shows the Microsoft Dynamics CRM interface for a project named 'Green Earth Organics'. The 'Stage' field is set to '05. Application IP Manager/LAG User Sign-off'. A red arrow points to the 'Save' button in the top left, and another red arrow points to the 'Stage' field dropdown.

Field	Value
Project Ref ID	01WCIP100000183
Promoter Name	Taste of Mallow
LAG	West Cork IP1 (do not edit)
LDS	West Cork LDS (do not edit)
Indicative Grant Amount	€100,000.00
Gaeltacht Area?	No
Is this an Enterprise?	No
Assignee	IPUSER03 West Cork (do not edit)
Stage	05. Application IP Manager/LAG User Sign-off
LAG Ref ID	IP1000
Call Type	Targeted
Island Area?	No
Enterprise Type	Medium
New or Existing Enterprise?	New
Project Description	Green Earth Organics
Description	This project is for a new organic food supermarket in Mallow.
Status	Active



#### Notes:

- **All Application Public Procurement Check questions must be answered.**
- If you try and save the project at Stage 05 Application LAG User Sign-off before all Application Public Procurement Checks questions are answered, **the system will report an error message.**
- You can easily see which questions remain unanswered by referring to the **Response Type** field in the subgrid.
- The project is now at **Stage 05 Application LAG User Sign-off.**

## Stage 05

### Application LAG User Sign-Off

#### Overview

Stage	LAG Project User	LAG User	LAG Manager	Article 48 User	Article 48 Manager	Can Progress To Stage
<b>05 Application LAG User Sign Off</b> The project information entered is signed off by the LAG User. Progress to "06 Application LAG Manager Approval"		LAG User				↓ 06 ↓ 16 ↓ 17

The project record information and the Application Public Procurement Checklist questions are now reviewed and signed off by the LAG User (or the IP Manager in the case of an IP project). In the case of a LAG, when the LAG User is satisfied that the information entered is correct, they sign off by progressing the project to **Stage 06 Application LAG Manager Approval**. Alternatively the project is reversed by the LAG User to Stage 04 Application Public Procurement Checklist for amending.



**Note:** This stage is called "05 Application IP Manager or LAG User Sign-Off". For a project created by a Local Action Group, the LAG User completes the sign off. However for a project created by an Implementing Partner, the IP Manager does the sign off.

#### Process

(1) The LAG User opens the project record at **Stage 05 Application LAG User Sign Off**

The screenshot shows the Microsoft Dynamics CRM interface for a project named 'Green Earth Organics'. The 'General' tab is selected, and the 'Stage' dropdown menu is open, showing '05. Application IP Manager/LAG User Sign-off' as the selected option. A red arrow points to this stage dropdown. The project details include:

- Project Ref ID:** 01WCIP100000183
- Assignee:** IPUSER03 West Cork (do not edit)
- Promoter Name:** Taste of Mallow
- LAG:** West Cork IP1 (do not edit)
- LAG Ref ID:** IP1000
- LDS:** West Cork LDS (do not edit)
- Call Type:** Targeted
- Indicative Grant Amount:** €100,000.00
- Island Area?** No (selected)
- Enterprise Type:** Medium
- Is this an Enterprise?** No (selected)
- New or Existing Enterprise?** New
- Project Description:** Green Earth Organics. This project is for a new organic food supermarket in Mallow.
- Status:** Active

(2) The LAG User reviews the project record information that has been entered.

The screenshot shows the Microsoft Dynamics CRM interface for a project named 'Green Earth Organics'. The 'General' tab is active, displaying the following information:

- Project Ref ID:** 01WCIP10000183
- Promoter Name:** Taste of Mallow
- LAG:** West Cork IP1 (do not edit)
- LDS:** West Cork LDS (do not edit)
- Indicative Grant Amount:** €100,000.00
- Gaeltacht Area?** No
- Is this an Enterprise?** Yes
- Assignee:** IPUSER03 West Cork (do not edit)
- Stage:** 05. Application IP Manager/LAG User Sign-off
- LAG Ref ID:** IP1000
- Call Type:** Targeted
- Island Area?** No
- Enterprise Type:** Medium
- New or Existing Enterprise?** New
- Project Description:**
  - Project Name:** Green Earth Organics
  - Description:** This project is for a new organic food supermarket in Mallow.
  - Status:** Active

(3) The LAG User navigates to the **Application Public Procurement Checklist** questions section and **checks the responses entered** using the subgrid or by clicking into each question.

The screenshot shows the 'Art 48 Application Checklist' subgrid for the 'Green Earth Organics' project. The subgrid displays a list of checklist items with their response dates, types, and comments. A red callout box points to the subgrid with the text: "The responses can be checked by using the subgrid or by clicking into each question."

Checklist Item	Response Date	Response Type	Response Comments	Article 48 Respo...	Verification Comments	Created On
1001. Application Form - Is there a fully completed applic...	19/01/17	Yes	There is an application for...			18/01/17 21:34
1002. Application Form - Does the application clearly defi...	19/01/17	Yes	Yes the project is clearly d...			18/01/17 21:34
1003. Application Form - Where applicable, are all amend...	25/01/17	Yes	No amendments.			18/01/17 21:34
1004. Application Form - Has the application been ackno...	19/01/17	Yes	Acknowledgement letter s...			18/01/17 21:34
1005. Application Form - Have all documents been date s...	20/01/17	Yes				18/01/17 21:34
1006. Eligibility - Is the beneficiary eligible in accordance...	20/01/17	Yes				18/01/17 21:34
1007. Eligibility - Is the project eligible under the Theme...	20/01/17	Yes				18/01/17 21:34
1008. Financing/ Viability - Has confirmation of matching...	20/01/17	Yes				18/01/17 21:34
1009. Financing/ Viability - Are matching funds eligible?	20/01/17	Yes				18/01/17 21:34
1010. Financing/ Viability - Is the project financially sustai...	20/01/17	Yes				18/01/17 21:34
1011. Financing/ Viability - Has a business plan/marketing...	20/01/17	Yes				18/01/17 21:34
1012. Financing/ Viability - If VAT has been included in th...	20/01/17	Yes				18/01/17 21:34
1013. Financing/ Viability -Have management accounts or...	20/01/17	Yes				18/01/17 21:34

- (4) If satisfied with the project information entered including any uploaded documentation, the LAG User signs off on the project by progressing it to **Stage 06 Application LAG Manager Approval** and clicks **Save**. The stage updates.

The screenshot shows the Microsoft Dynamics CRM interface for a project named "Green Earth Organics". The top ribbon has a "Save" button highlighted with a red arrow. The main form area shows the "General" tab with various fields. The "Stage" dropdown menu is set to "06. Application LAG Manager Approved", and a red arrow points to it. The "Project Description" field contains the text "This project is for a new organic food supermarket in Mallow." The "Status" field is set to "Active".

Field	Value
Project Ref ID	01WCIP100000183
Promoter Name	Taste of Mallow
LAG	West Cork IP1 (do not edit)
LDS	West Cork LDS (do not edit)
Indicative Grant Amount	€100,000.00
Gaeltacht Area?	No
Is this an Enterprise?	No
Project Description	Green Earth Organics This project is for a new organic food supermarket in Mallow.
Assignee	IPUSER03 West Cork (do not edit)
LAG Ref ID	IP1000
Call Type	Targeted
Island Area?	No
Enterprise Type	Medium
New or Existing Enterprise?	New
Status	Active

- (5) If not satisfied with the project information entered, the LAG User reverses the project to **04 Application Public Procurement Checks** and clicks **Save**.



**Note:**

- The LAG User can check for projects that are ready for their review (i.e. those that have been transitioned to **Stage 05 Application Sign-off**) by using the System View **“Stage 05 Application LAG Sign-off”** which is available within the Projects entity.

The screenshot displays the Microsoft Dynamics CRM interface. The left-hand navigation pane shows the 'Core Data' section with 'Projects' selected. The main area is divided into 'System Views' and a data table. In the 'System Views' list, '05. Application IP Manager/LAG User Sign-off' is highlighted. The data table below lists various project records with columns for Stage, Primary Local Objective, Date Application, Address, and New Project/Enterprise?.

Stage	Primary Local Objective	Date Application	Address	New Project/Enterprise?
06. Application L...	West Cork LDS/Enterprise...	10/01/2017		No
04. Application...	West Cork LDS/Rural Touri...	11/01/2017		No
01. EOI Submitted				No
02. EOI Eligible	West Cork LDS/Rural Touri...	31/01/2017		No
03. Application...	West Cork LDS/Rural Touri...	19/01/2017		No
01. EOI Submitted	West Cork LDS/Rural Touri...	15/10/2016		No
02. EOI Eligible				No
03. Application...	West Cork LDS/Enterprise...	01/02/2017		No
Submitted				No
Eligible				No
01. EOI Submitted	West Cork LDS/Rural Touri...	04/10/2016		No
01. EOI Submitted				No
01. EOI Submitted				No
01. EOI Submitted				No
01. EOI Submitted				No
05. Application L...	West Cork LDS/Enterprise...	23/01/2017		No

## Stage 06

### Application LAG Manager Approval

#### Overview

Stage	LAG Project User	LAG User	LAG Manager	Article 48 User	Article 48 Manager	Can Progress To Stage
<b>06 Application LAG Manager Approval</b> The project is approved by the LAG Manager. Progress to "07 Application Evaluation Eligibility Checklist"			LAG Manager			↓ 07 ↓ 16 ↓ 17

The project must now be approved by the LAG Manager. The LAG Manager reviews the project record information including the Application Public Procurement Checklist answers and any supporting documentation uploaded to the Document Library. If satisfied with the information, the LAG Manager approves the application by progressing it to **Stage 07 Application Evaluation Eligibility Assessment**. Alternatively the project is reversed by the LAG Manager to Stage 05 Application IP Manager or LAG User Sign Off for amending.



**Note:** At this stage the LAG Manager also reviews any Implementing Partner projects that also require a LAG Manager sign off at this stage. This is covered [here](#).

#### Process

- (1) The LAG Manager reviews the project information and if satisfied approves the application by progressing it to Stage 07 Application Evaluation Eligibility Assessment.

The screenshot displays the Microsoft Dynamics CRM interface for a project named 'Green Earth Organics'. The 'General' tab is active, showing various project details. A red arrow points to the 'Save' button in the top left ribbon. Another red arrow points to the 'Stage' dropdown menu, which is currently set to '07. Application Evaluated (Eligibility Assessment)'. The project details include:

- Project Ref ID:** 01WCIP10000183
- Promoter Name:** Taste of Mallow
- LAG:** West Cork IP1 (do not edit)
- LDS:** West Cork LDS (do not edit)
- Indicative Grant Amount:** €100,000.00
- Gaeltacht Area?** No
- Is this an Enterprise?** Yes
- Assignee:** IPUSER03 West Cork (do not edit)
- Stage:** 07. Application Evaluated (Eligibility Assessment)
- LAG Ref ID:** IP1000
- Call Type:** Targeted
- Enterprise Type:** Medium
- Enterprise:** New
- Project Description:** Green Earth Organics. This project is for a new organic food supermarket in Mallow.
- Status:** Active

## Stage 07

### Application Evaluation Eligibility Assessment

#### Overview

Stage	LAG Project User	LAG User	LAG Manager	Article 48 User	Article 48 Manager	Can Progress To Stage
<b>07 Application Evaluation Eligibility Checklist</b> The Application Evaluation Eligibility Assessment Checklist questions are completed. Progress to "08 Application Article 48 User Check".	LAG Project User	LAG User				↓ 08 ↓ 16 ↓ 17

At Stage 07 Application Evaluation Eligibility Assessment the second checklist of questions are completed by the LAG Project User or LAG User. This checklist relates to eligibility items including the eligibility of the Evaluation Committee members involved in the decision-making process. There are 7 checklist questions in this section. In addition the **Evaluation Committee Date** is entered at this stage. Once complete the LAG Project User or LAG User signals this is done by progressing the status to **08 Application Evaluation Article 48 Check**. Alternatively the project is reversed by the LAG Project User or LAG User to Stage 06 LAG Manager Approval for amending.

#### Process

- (1) The LAG Project User or LAG User opens the project record which is currently at **07 Application Evaluated Eligibility Assessment**.

The screenshot displays the Microsoft Dynamics CRM interface for a project record titled "Green Earth Organics". The interface includes a navigation pane on the left with sections like "Project Basic", "Related", "Common", and "Processes". The main area shows the "General" tab with various fields for project details.

**Project Details:**

- Project Ref ID:** 01WCIP100000183
- Promoter Name:** Taste of Mallow
- LAG:** West Cork IP1 (do not edit)
- LDS:** West Cork LDS (do not edit)
- Indicative Grant Amount:** €100,000.00
- Gaeltacht Area?** No
- Is this an Enterprise?** Yes
- Assignee:** IPUSER03 West Cork (do not edit)
- Stage:** 07. Application Evaluated (Eligibility Assessment)
- LAG Ref ID:** IP1000
- Call Type:** Targeted
- Island Area?** No
- Enterprise Type:** Medium
- New or Existing Enterprise?** New
- Project Name:** Green Earth Organics
- Description:** This project is for a new organic food supermarket in Mallow.
- Status:** Active

(2) The user then navigates to the Application Evaluation Eligibility Assessment checklist:

The screenshot shows the Microsoft Dynamics CRM interface for a project named 'Green Earth Organics'. The left sidebar contains a navigation pane with 'Project Basic' expanded, showing 'General', 'Questions', 'Dates', 'Reasons & Notes', 'Art 48 Application Ch...', and 'Financials'. The 'Art 48 Application Ch...' item is selected. The main area displays the 'Application Evaluation' section. A red arrow points to the 'Application Evaluation' tab. Below the tab is a table with columns: Checklist Respo..., Checklist Item, Response Date, Project Stage, Response Type, Response Comments, and Article 48 Respo... The table contains 7 rows of data. Below the table is a status bar showing '1 - 7 of 7 (0 selected)' and 'Page 1'. At the bottom, there are two text boxes for 'Art 48 End of Project Application overall response' and 'Art 48 End of Project Application overall response comments'. The status is 'Active'.

Checklist Respo...	Checklist Item	Response Date	Project Stage	Response Type	Response Comments	Article 48 Respo...
10442	1062. Are the Evaluation Committee meeting minutes (ext...	20/01/2017	02. EOI Eligible	Yes		
10443	1063. Did any Evaluation Committee member declare a c...	20/01/2017	02. EOI Eligible	Yes		
10444	1064. Is the % aid level, ceiling amount and any particular...	20/01/2017	02. EOI Eligible	Yes		
10445	1065. Was the rationale for deadweight and displacement...	20/01/2017	02. EOI Eligible	Yes		
10446	1066. Has each Evaluation Committee member complete...	02. EOI Eligible				
10447	1067. Has an average score been calculated for the projec...	02. EOI Eligible				
10448	1068. Do the Evaluation Committee minutes contain a det...	02. EOI Eligible				

(3) Double click on the first checklist question to open it.

The screenshot shows the same Microsoft Dynamics CRM interface as the previous one, but with a red arrow pointing to the first checklist question in the table. The table now shows 4 rows of data. Below the table is a status bar showing '1 - 4 of 7 (0 selected)' and 'Page 1'. At the bottom, there are two text boxes for 'Art 48 End of Project Application overall response' and 'Art 48 End of Project Application overall response comments'. The status is 'Active'.

Checklist Respo...	Checklist Item	Response Date	Project Stage	Response Type	Response Comments	Article 48 Respo...
10442	1062. Are the Evaluation Committee meeting minutes (ext...		02. EOI Eligible			
10443	1063. Did any Evaluation Committee member declare a c...		02. EOI Eligible			
10444	1064. Is the % aid level, ceiling amount and any particular...		02. EOI Eligible			
10445	1065. Was the rationale for deadweight and displacement...		02. EOI Eligible			

**(4) The Checklist Response form opens.**

The screenshot shows the Microsoft Dynamics CRM interface. The browser address bar displays <https://hub.poba.lie/Leader/main.aspx#>. The top navigation bar includes 'File', 'Projects', 'View', 'Charts', 'Add', and 'Customize'. The left sidebar contains 'Information' (General, Response, Article 48 Response), 'Related' (Common, Audit History), and 'Processes' (Workflows). The main content area is titled 'Checklist Response 10442' and shows the owner 'IPUSER03 West Cork (do not edit)'. Under the 'General' tab, the 'Checklist Response ID' is 10442, the 'Project' is 'Green Earth Organics', and the 'Type of Project Checklist' is 'Evaluation'. A checklist item is visible: '1062. Are the Evaluation Committee meeting minutes (extract) retained on the project file?'. Under the 'Response' tab, the 'Response Type' field is empty, the 'Response Date' is '20/01/2017', and there is a text area for 'Response Comments'. The 'Status' is 'Active'.

**(5) Click on the blue icon beside the Response Type field to record the response.**

This screenshot is identical to the previous one, but with a red arrow pointing to a small blue icon located to the right of the 'Response Type' text box. This icon is used to record the response.

(6) The Response Type Lookup box opens.

**Look Up Record**  
Enter your search criteria and click Search to find matching records. Filter your results and view different columns of data by using the View options. Then, select the record you want and click OK.

**Look for:** Response Type ☐ **Show Only My Records**

**View:** Response Type Lookup View

**Search:** Search for records

Name	Checklist Response Type	Created On
<input type="checkbox"/> No	LAG Response	09/02/2016 13
<input type="checkbox"/> Not Applicable	LAG Response	09/02/2016 13
<input type="checkbox"/> Yes	LAG Response	09/02/2016 13

1 - 3 of 3 (0 selected) Page 1

Properties New OK Cancel Remove Value

(7) Choose the appropriate response (Yes, No or Not Applicable) and click OK.



**Look Up Record**  
Enter your search criteria and click Search to find matching records. Filter your results and view different columns of data by using the View options. Then, select the record you want and click OK.

**Look for:** Response Type ☐ **Show Only My Records**

**View:** Response Type Lookup View

**Search:** Search for records

Name	Checklist Response Type	Created On
<input type="checkbox"/> No	LAG Response	09/02/2016 13
<input type="checkbox"/> Not Applicable	LAG Response	09/02/2016 13
<input checked="" type="checkbox"/> Yes	LAG Response	09/02/2016 13

1 - 3 of 3 (1 selected) Page 1

Properties New OK Cancel Remove Value

- (8) Complete the **Response Comments** box if desired. Note it is not mandatory to complete this. Then click **Save & Close**.

The screenshot shows the 'Checklist Response' form in Microsoft Dynamics CRM. The top ribbon has buttons for 'Save', 'Save & Close', 'Copy a Link', 'Email a Link', 'Run Workflow', 'Start Dialog', and 'Run Report'. A red arrow points to the 'Save & Close' button. The form displays details for Checklist Response ID 10382, owned by IPUSER03 West Cork. The 'General' section shows the Project as 'Green Earth Organics' and the Check List Item as '1001 Is there a fully completed application form signed and dated by the applicant on the file?'. The 'Response' section shows a 'Response Type' of 'Yes' and a 'Response Date' field. The 'Response Comments' text area contains the text: 'There is an application form on file signed by the Promoter.' The status is 'Active'.

- (9) The record saves and the details are visible in the subgrid.

The screenshot shows the 'Project' form for 'Green Earth Organics' in Microsoft Dynamics CRM. The 'Application Evaluation' subgrid is visible, showing a list of checklist items. A red arrow points to the 'Response Type' column for the selected record (ID 10442), which shows 'Yes'. The status is 'Active'.

Checklist Respo...	Checklist Item	Response Date	Project Stage	Response Type	Response Comments	Article 48 Respo...
10442	1062. Are the Evaluation Committee meeting minutes /ext...	20/01/2017	02. EOI Eligible	Yes		
10443	1063. Did any Evaluation Committee member declare a c...					
10444	1064. Is the % aid level, ceiling amount and any particula...					
10445	1065. Was the rationale for deadweight and displacement...					
10446	1066. Has each Evaluation Committee member complete...					
10447	1067. Has an average score been calculated for the projec...					
10448	1068. Do the Evaluation Committee minutes contain a det...					

- (10) Repeat the process for all other Application Evaluation Eligibility Assessment checklist questions.

(11) The screen should now look like this.

The screenshot shows the Microsoft Dynamics CRM interface for the 'Green Earth Organics' project. The left sidebar contains a navigation menu with 'Project Basic' (General, Questions, Dates, Reasons & Notes, Art 48 Application Ch..., Financials), 'Related' (Common: Documents, Audit History, Claims for this Project, Cooperation Partners..., Poba/Dept Internal N..., Stage Audits, Checklist Responses f...), and 'Processes' (Workflows). The main area displays the 'Application Evaluation' section with a search bar and a table of checklist items.

Checklist Respo...	Checklist Item	Response Date	Project Stage	Response Type	Response Comments	Article 48 Respo...
10442	1062. Are the Evaluation Committee meeting minutes (ext...	20/01/2017	02. EOI Eligible	Yes		
10443	1063. Did any Evaluation Committee member declare a c...	20/01/2017	02. EOI Eligible	Yes		
10444	1064. Is the % aid level, ceiling amount and any particular...	25/01/2017	02. EOI Eligible	Yes		
10445	1065. Was the rationale for deadweight and displacement...	20/01/2017	02. EOI Eligible	Yes		
10446	1066. Has each Evaluation Committee member complete...	25/01/2017	02. EOI Eligible	Yes		
10447	1067. Has an average score been calculated for the projec...	25/01/2017	02. EOI Eligible	Yes		
10448	1068. Do the Evaluation Committee minutes contain a det...	25/01/2017	02. EOI Eligible	Yes		

Below the table, there are fields for 'Art 48 End of Project Application overall response' and 'Art 48 End of Project Application overall response comments'. The status is 'Active'.

(12) Upload any relevant documents to the Documents folder.

The screenshot shows the Microsoft Dynamics CRM interface for the 'Green Earth Organics' project. The left sidebar contains a navigation menu with 'Project Basic' (General, Questions, Dates, Reasons & Notes, Art 48 Application Ch..., Financials), 'Related' (Common: Documents, Audit History, Claims for this Project, Cooperation Partners..., Poba/Dept Internal N..., Stage Audits, Checklist Responses f...), and 'Processes' (Workflows). The main area displays the 'General' section with various project details. A red arrow points to the 'Documents' folder in the left sidebar.

**Project Details:**

- Project Ref ID: 01WCIP100000183
- Promoter Name: Taste of Mallow
- LAG: West Cork IP1 (do not edit), West Cork LDS (do not edit)
- Indicative Grant Amount: €100,000.00
- Gaeltacht Area: No
- Is this an Enterprise?: No
- Project Description: Green Earth Organics. This project is for a new organic food supermarket in Mallow.

**Assignee and Stage:**

- Assignee: IPUSER03 West Cork (do not edit)
- Stage: 02. EOI Eligible
- LAG Ref ID: IP1000
- Call Type: No

(13) Providing all of the **Application Evaluation Eligibility Assessment checklist** questions have been answered, the **Stage** can be updated.

(14) Click the **Stage Lookup** icon, choose **08 Application Article 48 User Check** and click **OK**. The value in the Stage field updates.

The screenshot shows the Microsoft Dynamics CRM interface for a project named 'Green Earth Organics'. The 'Stage' field is highlighted with a red arrow pointing to the 'Stage Lookup' icon. The form displays various fields including Project Ref ID, Promoter Name, LAG, LDS, Indicative Grant Amount, Gaeltacht Area, Is this an Enterprise?, Enterprise Type, and Project Description.



#### Notes:

- All Application Evaluation Eligibility Assessment checklist questions must be answered.
- If you try and advance the stage before all Application Evaluation Eligibility Assessment checklist questions are answered the system will report an error message.
- You can easily check which questions remain outstanding and unanswered by referring to the Response Type field in the subgrid.
- This is the end of the Application Evaluation Eligibility Assessment Checks. The project is now ready for the Article 48 checks which are performed by Pobal and this is the next step.

## Stage 08

### Application Article 48 User Check

#### Overview

Stage	LAG Project User	LAG User	LAG Manager	Article 48 User	Article 48 Manager	Can Progress To Stage
<b>08 Application Article 48 User Check</b> The Pobal Article 48 User fills in responses to all the checklist questions and progresses to "09 Application Article 48 Manager Verification".				Article 48 User		↓ 09 ↓ 10 ↓ 16

At Stage 08 the project record is reviewed by the Pobal Article 48 User who performs the Article 48 checks. This involves reviewing the responses to both the Application Public Procurement and Application Evaluation Eligibility Assessment checklist questions. If the Pobal Article 48 User is satisfied with the answers they progress the project to **Stage 09 Application Article 48 Manager Verification**. Alternatively the project is reversed by the Article 48 User to 07 Application Evaluation Eligibility Checklist for amending.

#### Process

- (1) **The Pobal Article 48 User reviews the response** to both the Application Public Procurement and the Application Evaluation Eligibility Assessment checklist questions. They record their own response to each question in the Checklists, adding verification comments where required. If satisfied that all is in order, the Pobal Article 48 User progresses the project to **Stage 09 Application Article 48 Manager Verification**.

The screenshot displays the Microsoft Dynamics CRM interface for a project named 'Green Earth Organics'. The ribbon at the top includes buttons for 'Save', 'Deactivate', 'Copy a Link', 'E-mail a Link', 'Run Workflow', 'Start Dialog', and 'Run Report'. The 'Save' button is highlighted with a red arrow. The main area shows the project details for 'Green Earth Organics', including fields for Project Ref ID, Promoter Name, LAG, LDS, Indicative Grant Amount, Gaeltacht Area, Is this an Enterprise?, Project Description, Project Name, Description, and Status. The 'Stage' dropdown menu is highlighted with a red arrow, showing '09. Application Art 48 Manager Verified' selected. The 'Assignee' field shows 'David Watchorn'.

## Stage 09

### Application Article 48 Manager Verification

#### Overview

Stage	LAG Project User	LAG User	LAG Manager	Article 48 User	Article 48 Manager	Can Progress To Stage
<b>09 Application Article 48 Manager Verification</b> The Article 48 Verification by the Pobal Article 48 Manager before the Application decision. Progress to "09 Application Article 48 Manager Verification".					Article 48 Manager	↓ 10 ↓ 16 ↓ 17

The project is now with the Pobal Article 48 Manager who **reviews the responses** to both the Application Public Procurement checklist and the Application Evaluation Eligibility Assessment checklist questions as well as the responses and comments entered by the Pobal Article 48 User at the previous stage. If the Pobal Article 48 Manager is satisfied with the answers they progress the project to **Stage 10 Application Decision**. Alternatively the project is reversed by the Article 48 Manager to 08 Application Article 48 User Check for amending.

#### Process

- (1) **The Pobal Article 48 Manager reviews the responses** to both the Application Public Procurement and the Application Evaluation Eligibility Assessment checklist questions as well as the responses and comments entered by the Pobal Article 48 User at the previous step.
- (2) If satisfied, the Pobal Article 48 Manager populates **Article 48 End of Project Application Overall Response** and **Article 48 End of Project Application Overall Response Comments**.

Field	Options
<b>Article 48 End of Project Application Overall Response</b>	Choose: <ul style="list-style-type: none"> <li>• Complete</li> <li>• Complete with outstanding items</li> <li>• Incomplete</li> </ul>
<b>Article 48 End of Project Application Overall Response Comments</b>	A comment field for adding any comments.

(3) The project should now look like this.

Project: Green Earth Organics

Checklist Item	Response Date	Project Stage	Response Type	Response Comments	Article 48 Respo
10442 1062. Are the Evaluation Committee meeting minutes (ext...	20/01/2017	02. EOI Eligible	Yes		
10443 1063. Did any Evaluation Committee member declare a c...	20/01/2017	02. EOI Eligible	Yes		
10444 1064. Is the % aid level, ceiling amount and any particular...	20/01/2017	02. EOI Eligible	Yes		
10445 1065. Was the rationale for deadweight and displacement...	20/01/2017	02. EOI Eligible	Yes		

Art 48 End of Project Application overall response: All approved and no issues.

Status: Active

(4) If satisfied the Pobal Article 48 Manager completes the verification by progressing the project to **Stage 10 Application Decision**.

Project: Green Earth Organics

Project Ref ID: 01WCIP100000183

Assignee: David Watchorn

Promoter Name: Taste of Mallow

Stage: 10. Application Decision

LAG: West Cork IP1 (do not edit)

LAG Ref ID: IP1000

LDS: West Cork LDS (do not edit)

Call Type: Targeted

Indicative Grant Amount: €100,000.00

Island Area?: No

Enterprise Type: Medium

Is this an Enterprise?: Yes

New or Existing Enterprise?: New

Project Description:

Project Name: Green Earth Organics

Description: This project is for a new organic food supermarket in Mallow.

Status: Active



## Notes

- If there is an issue the project can be reversed for amending.

## Stage 10

### Application Decision

#### Overview

Stage	LAG Project User	LAG User	LAG Manager	Article 48 User	Article 48 Manager	Can Progress To Stage
<b>10 Application Decision</b> The decision on the application is made and the Board Approval Date is entered. The project is then progressed to "11 Final LAG or IP User Check".	LAG Project User	LAG User				↓ 11 ↓ 16 ↓ 17

The project is now ready for Local Action Group consideration (LAG Board). This is an offline process. When a decision is reached, the **Board Approval Date** is entered onto the system by the LAG Project User or LAG User. The project is then progressed to the next appropriate stage depending on the decision as follows:

- If **Approved** progress to Stage 11 for final approval checks.
- If **Rejected** progress to Stage 17 Project Rejected
- If **Withdraw** progress to Stage 16 EOI or Project Withdrawn

#### Process

- (1) **The Local Action Group makes their decision on the project in an offline process.**
- (2) When the decision is made, the **Board Approval Date** is entered by the LAG Project User or LAG User.

Field	Options
<b>Board Approval Date</b>	The date the Local Action Group board approves the project decision.

(3) The screen should now look like this:

Project: Green Earth Organics

**Dates**

Date EOI Received: 18/01/2017

Evaluation Committee Date: 20/01/2017

Date Application Submitted by LAG: 19/01/2017

Board Approval Date: 21/01/2017

Comments:

Offer Sent date:

Contract Effective Date:

Contract Extension Date:

Offer Accepted By:

Contract Completion Date:

**Reasons & Notes**

Rejection Reasons:

Status: Active

(4) If the decision is that the project is approved, the LAG Project User or LAG User signifies this by progressing the project to the next stage for the final checks.

(5) Click on **Stage** and choose **11 Final LAG or IP User Check**, click **OK** and press **Save**.

Project: Green Earth Organics

**General**

Project Ref ID: 01WICP100000183

Promoter Name: Taste of Mallow

LAG: West Cork IP1 (do not edit)

LDS: West Cork LDS (do not edit)

Indicative Grant Amount: €100,000.00

Island Area? ☒ No ☐ Yes

Enterprise Type: Medium

Project Description:

Project Name: Green Earth Organics

Description: This project is for a new organic food supermarket in Mallow.

Status: Active

## Stage 11

### Final LAG User Check

#### Overview

Stage	LAG Project User	LAG User	LAG Manager	Article 48 User	Article 48 Manager	Can Progress To Stage
<b>11 Final LAG/IP User Check</b> The Final Approval Checklist is completed by the LAG Project User or LAG User. The project is then progressed to "12 Final LAG Manager Approval".	LAG Project User	LAG User				↓ 12 ↓ 16 ↓ 17

The project which has been approved by the Local Action Group now moves through the final approval checks. The LAG Project User or LAG User **now answers the Final Approval Checklist questions**. There are 10 questions (questions 68-77) to be answered at this stage. When complete, the project is progressed to **Stage 12 Final LAG Manager Approval**. Alternatively the project is reversed by the LAG Project User or LAG User to 10 Application Decision for amending.

#### Process

- (1) Open the project which is at **Stage 11 Final LAG User Check**.

The screenshot shows the Microsoft Dynamics CRM interface for a project named 'Green Earth Organics'. The project is currently at Stage 11, 'Final LAG/IP User Check'. The interface includes a navigation pane on the left with sections like Project Basic, Related, Common, and Processes. The main area displays various fields for the project, including Project Ref ID, Promoter Name, LAG, LDS, Indicative Grant Amount, Gaeltacht Area, Enterprise Type, and Project Description.

Field	Value
Project Ref ID	01WCBP100000183
Promoter Name	Taste of Mallow
LAG	West Cork IP1 (do not edit)
LDS	West Cork LDS (do not edit)
Indicative Grant Amount	€100,000.00
Gaeltacht Area?	No
Enterprise Type	Medium
Project Name	Green Earth Organics
Description	This project is for a new organic food supermarket in Mallow.
Status	Active

(2) Navigate to the **Article 48 Final Approval Checklist** questions.

Project: Green Earth Organics

Art 48 Project Final Checklist

Checklist Item	Response Date	Project Stage	Response Type	Response Comments	Article 48 Respo...	Verification
10449: Are signed copies of the LAG minutes (extract) retai...	20/01/2017	02: EOI Eligible				
10450: Did any Board member declare a conflict and absen...	20/01/2017	02: EOI Eligible				
10451: Are the % aid level and ceiling amount clearly docu...	20/01/2017	02: EOI Eligible				
10452: Is the rationale or criteria for grant aid included in t...	20/01/2017	02: EOI Eligible				

1 - 4 of 21 (0 selected)

Final overall response: [ ]

Final overall response comments: [ ]

Financials

Total Project Cost: € [ ]

Total Final Costs: € [ ]

Contribution in Kind: € [ ]

Status: Active

(3) Put a tick in the **box beside the first question** and click **Edit**

Project: Green Earth Organics

Art 48 Project Final Checklist

Checklist Item	Response Date	Project Stage	Response Type	Response Comments	Article 48 Respo...	Verification
10449: Are signed copies of the LAG minutes (extract) retai...	20/01/2017	02: EOI Eligible				
10450: Did any Board member declare a conflict and absen...	20/01/2017	02: EOI Eligible				
10451: Are the % aid level and ceiling amount clearly docu...	20/01/2017	02: EOI Eligible				
10452: Is the rationale or criteria for grant aid included in t...	20/01/2017	02: EOI Eligible				

1 - 4 of 21 (1 selected)

Final overall response: [ ]

Final overall response comments: [ ]

Financials

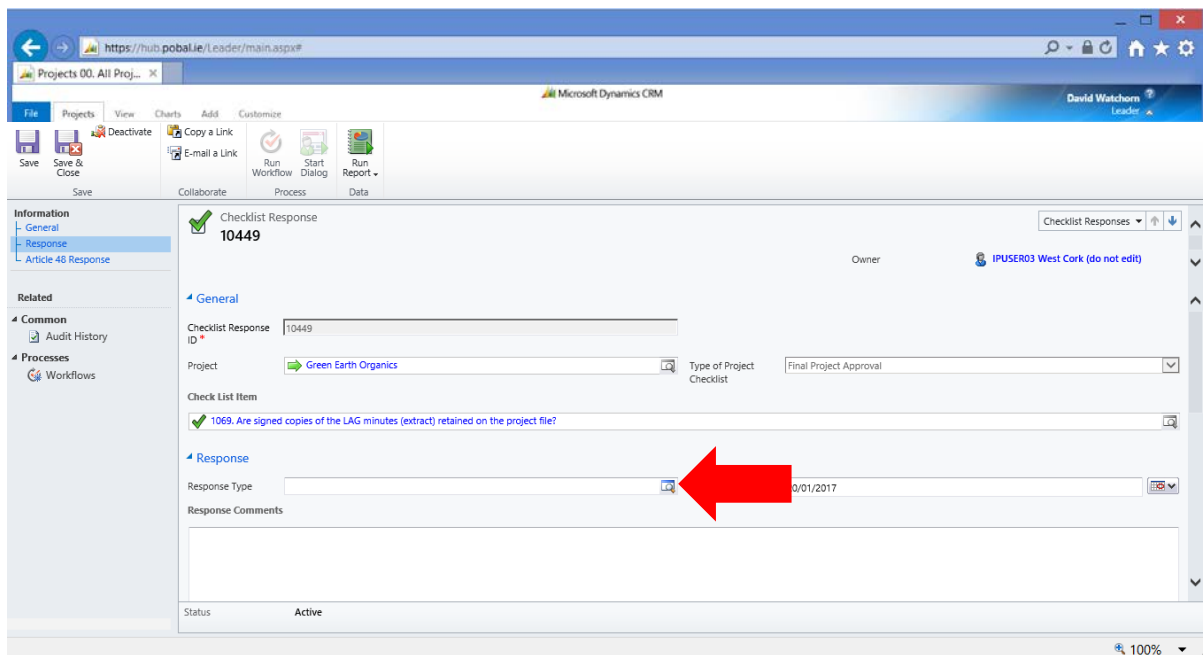
Total Project Cost: € [ ]

Total Final Costs: € [ ]

Contribution in Kind: € [ ]

Status: Active

(4) Click the **Response Type** lookup icon:



Checklist Response 10449

Owner: IPUSER03 West Cork (do not edit)

**General**

Checklist Response ID #: 10449

Project: Green Earth Organics

Type of Project Checklist: Final Project Approval

Check List Item: 1069. Are signed copies of the LAG minutes (extract) retained on the project file?

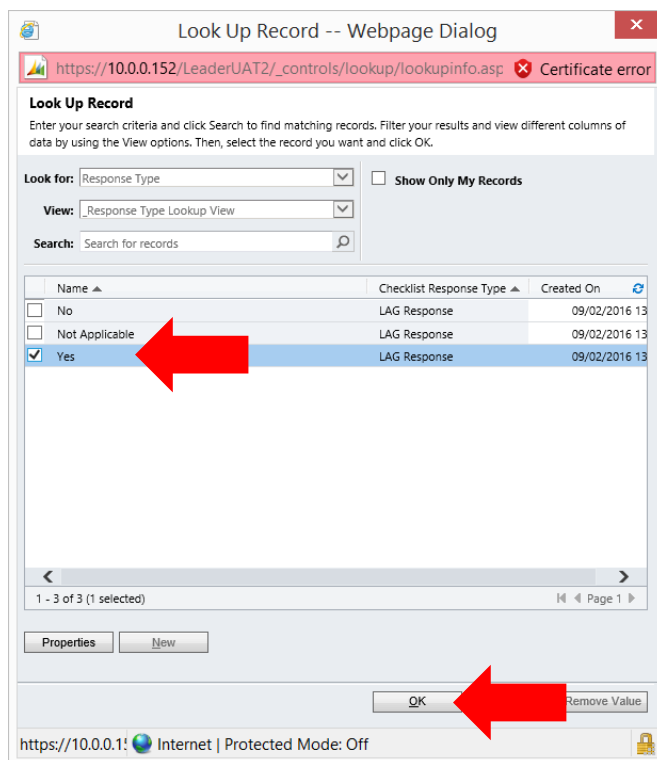
**Response**

Response Type: [Lookup Icon] 0/01/2017

Response Comments:

Status: Active

(5) Choose the **Response** (e.g. "Yes") and click **OK**.



Look Up Record -- Webpage Dialog

https://10.0.0.152/LeaderUAT2/\_controls/lookup/lookupinfo.asp Certificate error

**Look Up Record**

Enter your search criteria and click Search to find matching records. Filter your results and view different columns of data by using the View options. Then, select the record you want and click OK.

Look for: Response Type

View: Response Type Lookup View

Search: Search for records

☐ Show Only My Records

	Name	Checklist Response Type	Created On
<input type="checkbox"/>	No	LAG Response	09/02/2016 13
<input type="checkbox"/>	Not Applicable	LAG Response	09/02/2016 13
<input checked="" type="checkbox"/>	Yes	LAG Response	09/02/2016 13

1 - 3 of 3 (1 selected) Page 1

Properties New

OK Remove Value

https://10.0.0.1 Internet | Protected Mode: Off

(6) Populate the **Response Comments** if desired.

Microsoft Dynamics CRM

David Watchorn  
Leader

Checklist Response 10449

Owner: IPUSER03 West Cork (do not edit)

Project: Green Earth Organics

Type of Project Checklist: Final Project Approval

Check List Item: 1069. Are signed copies of the LAG minutes (extract) retained on the project file?

Response

Response Type: Yes

Response Date: 20/01/2017

Response Comments: Yes they are on file.

Article 48 Response

Article 48 Response: Status: Active

Note that the Response Date is automatically populated.

(7) Click **Save & Close**.

Microsoft Dynamics CRM

David Watchorn  
Leader

Checklist Response 10449

Owner: IPUSER03 West Cork (do not edit)

Project: Green Earth Organics

Type of Project Checklist: Final Project Approval

Check List Item: 1069. Are signed copies of the LAG minutes (extract) retained on the project file?

Response

Response Type: Yes

Response Date: 21/01/2017

Response Comments:

Article 48 Response

Article 48 Response: Status: Active

- (6) Note that the record is now saved and visible in the Article 48 Final Approval Checklist Response subgrid.

The screenshot shows the Microsoft Dynamics CRM interface for a project named 'Green Earth Organics'. The 'Art 48 Project Final Checklist' subgrid is visible, containing a table with columns: Checklist Item, Response Date, Project Stage, Response Type, and Response Comments. A red arrow points to a record in the subgrid.

Checklist Item	Response Date	Project Stage	Response Type	Response Comments
10449. Are signed copies of the LAG minutes (extract) retai...	21/01/2017	02. EOI Eligible	Yes	Yes they are on file.
10450. Did any Board member declare a conflict and absen...	20/01/2017	02. EOI Eligible		
10451. Are the % aid level and ceiling amount clearly docu...	20/01/2017	02. EOI Eligible		
10452. Is the rationale or criteria for grant aid included in t...	20/01/2017	02. EOI Eligible		

- (8) Repeat the process for all Article 48 Final Checklist questions and upload any relevant documentation to the Documents folder.

- (9) Upload any relevant documents to the Documents folder.

The screenshot shows the Microsoft Dynamics CRM interface for a project named 'Green Earth Organics'. The 'General' tab is selected, showing fields for Project Ref ID, Promoter Name, LAG, Indicative Grant Amount, Gaeltacht Area, and Project Description. A red arrow points to the 'Documents' folder in the left-hand navigation pane.

Project Ref ID: 01WCIP100000183  
Promoter Name: Taste of Mallow  
LAG: West Cork IP1 (do not edit)  
Indicative Grant Amount: €100,000.00  
Gaeltacht Area: No  
Project Description: Green Earth Organics  
Description: This project is for a new organic food supermarket in Mallow.

- (10) Once all the Final Approval Checklist Questions are answered, the user indicates this is done by progressing the **Stage**. Click the **Stage Lookup** icon, choose **12 Final LAG Manager Approval** and click **OK**. The value in the Stage field updates. Click **Save**.

The screenshot shows the Microsoft Dynamics CRM interface for a project named "Green Earth Organics". The "Stage" field is set to "12. Final LAG Manager Approved", which is highlighted by a red arrow. The "Save" button in the top ribbon is also highlighted with a red arrow. The form includes various fields for project details, such as Project Ref ID, Promoter Name, LAG, LDS, Indicative Grant Amount, Gaeltacht Area, and Enterprise Type. The project status is "Active".

Field	Value
Project Ref ID	01WICIP100000183
Promoter Name	Taste of Mallow
LAG	West Cork IP1 (do not edit)
LDS	West Cork LDS (do not edit)
Indicative Grant Amount	€100,000.00
Gaeltacht Area?	No
Is this an Enterprise?	Yes
Enterprise Type	Medium
Project Name	Green Earth Organics
Description	This project is for a new organic food supermarket in Mallow.
Status	Active

## Stage 12

### Final LAG Manager Approval

#### Overview

Stage	LAG Project User	LAG User	LAG Manager	Article 48 User	Article 48 Manager	Can Progress To Stage
<b>12 Final LAG Manager Approval</b> The Final Approval Checklist responses are approved by the LAG Manager. The project is then progressed to “13 Final Article 48 User Check”.			LAG Manager			↓ 13 ↓ 16 ↓ 17

The next step in the project approval process is sign off by the LAG Manager. The LAG Manager reviews the Article 48 Final Approval Checklist answers and if satisfied they sign off on the answers by progressing the project to **Stage 13 Final Article 48 User Check**. Alternatively the project is reversed by the LAG Manager to 11 Final LAG User Check for amending.



**Note:** At this stage the LAG Manager also reviews any Implementing Partner projects that also require a LAG Manager sign off at this stage. This is covered [here](#).

#### Process

- (1) The LAG Manager opens the project which is at **Stage 12 Final LAG Manager Approval**.

The screenshot shows the Microsoft Dynamics CRM interface for a project named 'Green Earth Organics'. The project is currently at Stage 12: Final LAG Manager Approved. The interface includes a navigation pane on the left with sections like 'Project Basic', 'Related', 'Common', and 'Processes'. The main area displays project details such as Project Ref ID, Promoter Name, LAG, LDS, Indicative Grant Amount, Gaeltacht Area, Island Area, Enterprise Type, and Project Description. A red arrow points to the '12. Final LAG Manager Approved' dropdown menu in the Stage field.

- (2) The LAG Manager navigates to the **Article 48 Final Approval Checklist** questions and checks the responses and any supporting documentation uploaded to the Document Library.

The screenshot shows the Microsoft Dynamics CRM interface. The left sidebar contains a navigation pane with 'Project Basic' expanded, showing 'General', 'Questions', 'Dates', 'Reasons & Notes', 'Art 48 Application Ch...', and 'Financials'. The 'Art 48 Application Ch...' is selected. The main area displays the 'Art 48 Project Final Checklist' for 'Green Earth Organics'. It includes a table with columns: Checklist Item, Response Date, Project Stage, Response Type, Response Comments, Article 48 Respo..., and Verification. The table lists four items (10449, 10450, 10451, 10452) with their respective response dates (21/01/2017) and project stages (02. EOI Eligible). Below the table, there are fields for 'Final overall response' (set to 'Complete'), 'Final overall response comments' (set to 'All requirements met.'), 'Total Project Cost', 'Total Final Costs', 'Contribution in Kind', and 'Status' (set to 'Active').

- (3) If the LAG Manager is satisfied with the Final Checklist answers they progress the project to the next stage. Click on **Stage**, choose **13 Final Article 48 User Check**, click **OK** and **Save**.

The screenshot shows the Microsoft Dynamics CRM interface with the 'General' tab selected for 'Green Earth Organics'. The left sidebar shows 'Project Basic' expanded, with 'General' selected. The main area displays the 'General' tab with various fields: 'Project Ref ID' (01WGP100000183), 'Promoter Name' (Taste of Mallow), 'LAG' (West Cork IP1 (do not edit)), 'LDS' (West Cork LDS (do not edit)), 'Indicative Grant Amount' (€100,000.00), 'Gaeltacht Area?' (No), 'Is this an Enterprise?' (Yes), 'Assignee' (IPUSER03 West Cork (do not edit)), 'Stage' (13. Final Art 48 User check), 'Call Type' (Targeted), 'Enterprise Type' (Medium), and 'New or Existing Enterprise?' (New). A red arrow points to the 'Save' button in the top left, and another red arrow points to the 'Stage' dropdown menu.



## Notes

- If there is an issue the project is reversed to the relevant stage for amending. The LAG Manager then communicates with the LAG Project User or LAG User in an offline process detailing the issue.

## Stage 13

### Final Article 48 User Check

#### Overview

Stage	LAG Project User	LAG User	LAG Manager	Article 48 User	Article 48 Manager	Can Progress To Stage
<b>13 Final Article 48 User Check</b> The Final Approval Checklist responses are checked by the Pobal Article 48 User. Progress to "14 Final Article 48 Manager Verification".				Article 48 User		↓ 14 ↓ 16 ↓ 17

At Stage 13, the Pobal Article 48 User **reviews the Article 48 Final Approval Checklist responses**. If the Pobal Article 48 User is satisfied with the answers the project is progressed to **Stage 14 Final Article 48 Manager Verification**. Alternatively the project is reversed by the Article 48 User to 12 Final LAG Manager Approval for amending.

#### Process

- (1) The Pobal Article 48 User **checks over the responses** to the Article 48 Final Approval Checklist answers.
- (2) If satisfied, the Pobal Article 48 User progresses the project to the next stage which is **14 Final Article 48 Manager Verification**.

The screenshot displays the Microsoft Dynamics CRM interface for a project named 'Green Earth Organics'. The top navigation bar shows the 'Save' button, which is highlighted with a red arrow. The 'Stage' dropdown menu is open, showing '14. Final Art 48 Manager' as the selected option, also highlighted with a red arrow. The project details include Project Ref ID, Promoter Name, LAG, LDS, Indicative Grant Amount, Gaeltacht Area, Enterprise Type, and Project Description.

## Stage 14

### Final Article 48 Manager Verification

#### Overview

Stage	LAG Project User	LAG User	LAG Manager	Article 48 User	Article 48 Manager	Can Progress To Stage
<b>14 Final Article 48 Manager Verification</b> The Final Approval Checklist responses are verified by the Pobal Article 48 Manager. The project is progressed to "15 Final Project Approved".					Article 48 Manager	↓ 15 ↓ 16 ↓ 17

The project record is now reviewed by the Pobal Article 48 Manager who signs off on the Article 48 Final Approval Checklist responses by progressing the project to **Stage 15 Final Project Approved**. Alternatively the project is reversed by the Article 48 Manager to 13 Final Article 48 User Check for amending.

#### Process

- (1) The Pobal Article 48 Manager **checks over the responses** to the Article 48 Final Approval Checklist responses.
- (2) The Pobal Article 48 Manager then populates **Article 48 End of Project Application Overall Response** and **Article 48 End of Project Application Overall Response Comments**.

Field	Options
Article 48 End of Project Application Overall Response	Choose: <ul style="list-style-type: none"> <li>Complete</li> <li>Complete with outstanding items</li> <li>Incomplete</li> </ul>
Article 48 End of Project Application Overall Response Comments	A comment field for adding any comments.

(3) The project should now look like this.

The screenshot shows the Microsoft Dynamics CRM interface for a project named 'Green Earth Organics'. The left sidebar contains navigation options like 'General', 'Questions', 'Dates', 'Reasons & Notes', 'Art 48 Application Ch...', and 'Financials'. The main area displays the 'Application Evaluation' section with a table of records. A red arrow points to the 'Art 48 End of Project' section, which shows 'Application overall response' and 'All approved and no issues.'

Checklist Respo...	Checklist Item	Response Date	Project Stage	Response Type	Response Comments	Article 48 Respo
10442	1062. Are the Evaluation Committee meeting minutes (ext...	20/01/2017	02. EOI Eligible	Yes		
10443	1063. Did any Evaluation Committee member declare a c...	20/01/2017	02. EOI Eligible	Yes		
10444	1064. Is the % aid level, ceiling amount and any particular...	20/01/2017	02. EOI Eligible	Yes		
10445	1065. Was the rationale for deadweight and displacement...	20/01/2017	02. EOI Eligible	Yes		

(4) The Pobal Article 48 Manager then verifies the project by progressing it to the next stage which is **15 Final Project Approved** and saves the record.

The screenshot shows the Microsoft Dynamics CRM interface for the 'Green Earth Organics' project. The left sidebar contains navigation options like 'Dates', 'Reasons & Notes', 'Art 48 Application Ch...', and 'Financials'. The main area displays the 'General' section with various fields. A red arrow points to the '15. Final Project Approved' stage.

Field	Value
Project Ref ID	01WCRIP100000183
Promoter Name *	Taste of Mallow
LAG *	West Cork IP1 (do not edit)
LDS *	West Cork LDS (do not edit)
Indicative Grant Amount *	€100,000.00
Gaeltacht Area?	No
Is this an Enterprise?	Yes
Assignee *	David Watchorn
Stage *	15. Final Project Approved
LAG Ref ID	IP1000
Call Type *	Targeted
Island Area?	No
Enterprise Type *	Medium
New or Existing Enterprise?	New
Project Description *	Green Earth Organics
Description *	This project is for a new organic food supermarket in Mallow.
Status	Active



## Notes

- This is the final project approval stage.
- If there is an issue the Pobal Article 48 Manager reverses the project for amending.

## Stage 15

### Final Project Approved

#### Overview

Stage	LAG Project User	LAG User	LAG Manager	Article 48 User	Article 48 Manager	Can Progress To Stage
<b>15 Final Project Approved</b> The project is now approved. The Letter of Offer and Contract dates are populated.	LAG Project User	LAG User				↓ 16 ↓ 17

This status reflects the Final Project Approval. The fields relating to the Offer and Contract date can be populated at this stage.

#### Process

Complete the following fields as needed. These fields need to be populated before any Project Claims are entered.

Field	Options
<b>Offer Sent Date</b>	The date the Letter of Offer is sent.
<b>Offer Accepted By</b>	Free text for person and date.
<b>Contract Effective Date</b>	The contract start date.
<b>Contract Completion Date</b>	The contract completion date.
<b>Contract Extension Date</b>	The contract extension date (if relevant).

## Stage 16

### EOI or Project Withdrawn

#### Overview

Stage	LAG Project User	LAG User	LAG Manager	Article 48 User	Article 48 Manager	Can Progress To Stage
<b>16 EOI or Project Withdrawn</b> A status for the Withdrawal of the Expression of Interest or the Project.	LAG Project User	LAG User				-

This status reflects the withdrawal of an Expression of Interest or a Project Application. The project can be withdrawn at various stages. When clicking on the Stage lookup icon, if you see the option **16 EOI or Project Withdrawn**, you can withdraw the project at that stage.

#### Process

- (1) The LAG Project User or LAG User moves the stage to **16 EOI or Project Withdrawn** and saves the record.



#### Notes

- Once a project record is saved after the Stage has been transitioned to “16 EOI or Project Withdrawn”, it cannot be reverted or moved to any other stage.
- If moved to this stage in error please contact the LEADER System Administrator in Pobal.

## Stage 17 Project Rejected

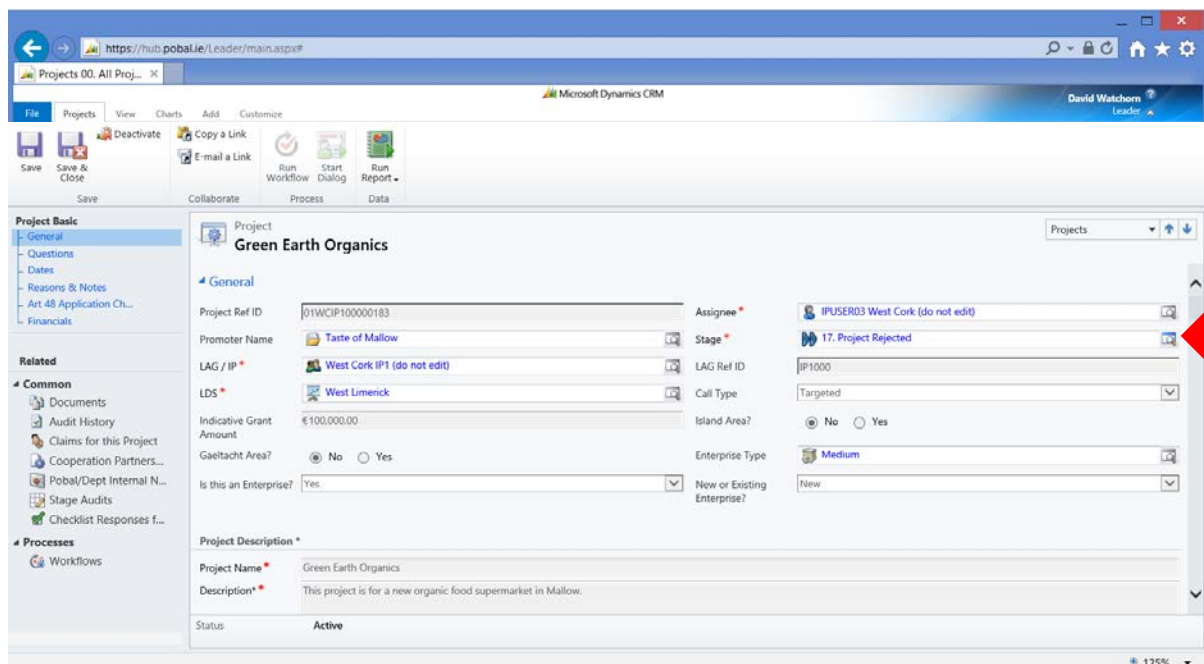
### Overview

Stage	LAG Project User	LAG User	LAG Manager	Article 48 User	Article 48 Manager	Can Progress To Stage
<b>17 Project Rejected</b> A status for the Rejection of the Application at Decision stage.	LAG Project User	LAG User				-

This status reflects the rejection of the project. The project can be rejected at various stages. When clicking on the Stage lookup icon, if you see the option of **17 Project Rejected**, you can reject the project at that stage.

### Process

- (1) The LAG Project User or LAG User moves the stage to **17 Project Rejected** and saves the record.



The screenshot shows the Microsoft Dynamics CRM interface for a project record. The project is named 'Green Earth Organics'. The 'Stage' field is set to '17. Project Rejected', which is highlighted by a red arrow. The form includes fields for Project Ref ID, Promoter Name, LAG / IP, LDS, Indicative Grant Amount, Gaeltacht Area, Island Area, Enterprise Type, and Project Description. The 'Status' is set to 'Active'.



### Notes

- Once the project record has been saved after the Stage has been transitioned to “17 Project Rejected”, it cannot be reverted or moved to any other stage.
- If moved to this stage in error please contact the LEADER System Administrator in Pobal.

## Stage 18

### EOI Ineligible

#### Overview

Stage	LAG Project User	LAG User	LAG Manager	Article 48 User	Article 48 Manager	Can Progress To Stage
<b>18 EOI Ineligible</b> A status for ineligible Expressions of Interest.	LAG Project User	LAG User				-

This status reflects an Expression of Interest that is deemed ineligible. When clicking on the Stage lookup icon, if you see the option of **18 EOI Ineligible**, you can deem the project ineligible at that stage.

#### Process

- (1) The LAG Project User or LAG User moves the stage to **18 EOI Ineligible** and saves the record.

The screenshot shows the Microsoft Dynamics CRM interface for a project record titled 'Green Earth Organics'. The 'Project Basic' tab is active, and the 'General' sub-tab is selected. The 'Stage' field is set to '18. EOI Ineligible'. Other fields include 'Project Ref ID' (01W/CIP100000183), 'Promoter Name' (Taste of Mallow), 'LAG / IP' (West Cork IP1 (do not edit)), 'LDS' (West Limerick), 'Indicative Grant Amount' (€100,000.00), 'Island Area?' (No), 'Enterprise Type' (Medium), 'Is this an Enterprise?' (Yes), and 'Project Description' (Green Earth Organics). The 'Status' is 'Active'.



#### Notes

- Once the project record has been saved after the Stage has been transitioned to “18 EOI Ineligible” it cannot be reverted or moved to any other stage.
- If moved to this stage in error please contact the LEADER System Administrator in Pobal.

# IP Projects

## Overview

Local Action Groups have a key role in the approval of projects created by their associated Implementing Partner organisation(s).

There are two stages at which a LAG Manager has overall approval responsibility for projects created by an associated Implementing Partner, as follows:

- 06 Application LAG Manager Approval; and
- 12 Final LAG Manager Approval.

Note: In addition to the above, at **Stage 10 Application Decision** of the IP Project, all projects that are created by an associated Implementing Partner must be approved by the LAG Board – this process is completed offline. At this point, all project application information has been entered on the ICT system by the IP staff, the first two checklists have been completed and the Pobal Article 48 checks on the two checklists have been processed.

When the LAG Board make a decision on the project, the **Board Approval Date** is entered onto the ICT system by the IP Project User or IP User. The project is then progressed to the next appropriate stage.

## IP Project Stages

Projects created by Implementing Partner organisations follow a similar process to projects created by Local Action Groups. There are two key stages where the LAG (LCDC) Manager is involved, namely at “06 LAG Manager Approval” and “12 Final LAG Manager Approval”. These are the only stages where LAG staff are involved in this process. The LAG Project User and LAG User are not involved in this process.

Stage	IP Project User	IP User	IP Manager	LAG Manager	Article 48 User	Article 48 Manager	Can Progress To Stage
<b>Create New EOI</b> Enter basic EOI details including Promoter, Indicative Budget, Project Name and Description, Primary Local Objective. Save as “01 EOI Submitted”	IP Project User	IP User					↓ 01
<b>01 EOI Submitted</b> Enter any outstanding EOI details. The EOI can now be progressed to “02 EOI Eligible”.	IP Project User	IP User					↓ 02 ↓ 16 ↓ 18
<b>02 EOI Eligible</b> Enter Application Form details including Sector or Initiative, Project Type, Sub-Type, Financials and progress to “03 Application Submitted”.	IP Project User	IP User					↓ 03 ↓ 16 ↓ 18
<b>03 Application Submitted</b> Progress the project to “04 Application Public Procurement Checklist”	IP Project User	IP User					↓ 04 ↓ 16 ↓ 17
<b>04 Application Public Procurement Checklist</b> Answer the Public Procurement checklist questions and progress to “05 Application IP Manager”.	IP Project User	IP User					↓ 05 ↓ 16 ↓ 17
<b>05 Application IP Manager Sign Off</b> The project is signed off by the IP Manager. Progress to “06 Application LAG Manager Approval”			IP Manager				↓ 06 ↓ 16 ↓ 17
<b>06 Application LAG Manager Approval</b> The project is approved by the LAG Manager in the associated Local Action Group. Progress to “07 Application Evaluation Eligibility Checklist”				LAG Manager			↓ 07 ↓ 16 ↓ 17
<b>07 Application Evaluation Eligibility Checklist</b> The Application Evaluation Eligibility Assessment Checklist is completed. Progress to “08 Application Article 48 User Check”.	IP Project User	IP User					↓ 08 ↓ 16
<b>08 Application Article 48 User Check</b> The Pobal Article 48 User fills in responses to all the checklist questions and progresses to “09 Application Article 48 Manager Verification”.					Article 48 User		↓ 09 ↓ 10 ↓ 16
<b>09 Application Article 48 Manager Verification</b> The Article 48 Verification by the Pobal Article 48 Manager before the Application decision. Progress to “09 Application Article 48 Manager Verification”.						Article 48 Manager	↓ 10 ↓ 16

Stage	IP Project User	IP User	IP Manager	LAG Manager	Article 48 User	Article 48 Manager	Can Progress To Stage
<b>10 Application Decision</b> The decision on the application is made and the Board Approval Date is entered. The project is then progressed to “11 Final LAG or IP User Check”.	IP Project User	IP User					↓ 11 ↓ 16 ↓ 17
<b>11 Final LAG or IP User Check</b> The Final Approval Checklist is completed by the LAG Project User or LAG User. The project is then progressed to “12 Final LAG Manager Approval”.	IP Project User	IP User					↓ 12 ↓ 16 ↓ 17
<b>12 Final LAG Manager Approval</b> The Final Approval Checklist responses are approved by the LAG Manager. The project is then progressed to “13 Final Article 48 User Check”.				LAG Manager			↓ 13 ↓ 16 ↓ 17
<b>13 Final Article 48 User Check</b> The Final Approval Checklist responses are checked by the Pobal Article 48 User. Progress to “14 Final Article 48 Manager Verification”.					Article 48 User		↓ 14 ↓ 16 ↓ 17
<b>14 Final Article 48 Manager Verification</b> The Final Approval Checklist responses are verified by the Article 48 Manager. The project is progressed to “15 Final Project Approved”.						Article 48 Manager	↓ 15 ↓ 16 ↓ 17
<b>15 Final Project Approved</b> The project is now approved. The User can populate Letter of Offer and Contract dates at this Stage.	IP Project User	IP User					↓ 16 ↓ 17
<b>16 EOI or Project Withdrawn</b> A status for the Withdrawal of the Expression of Interest or the Project.	IP Project User	IP User					-
<b>17 Project Rejected</b> A status for the Rejection of the Application at Decision stage.	IP Project User	IP User					-
<b>18 EOI Ineligible</b> A status for setting Expressions of Interest to ineligible.	IP Project User	IP User					-

## Stage 06

### Application LAG Manager Approval of IP Projects

#### Overview

Stage	LAG Project User	LAG User	LAG Manager	Article 48 User	Article 48 Manager	Can Progress To Stage
<b>06 Application LAG Manager Approval</b> The project is approved by the LAG Manager. Progress to “07 Application Evaluation Eligibility Checklist”			LAG Manager			↓ 07 ↓ 16 ↓ 17

At this stage, any projects that are created by an associated Implementing Partner must be approved by the LAG Manager. All application information will have been inputted by the IP staff, the Public Procurement checklist will have been answered and the project has been signed off by the IP Manager. The project now appears in a view called **“Stage 06 Application Manager LAG Approval”** which is the prompt for the LAG Manager to review and sign off on it. The LAG Manager then reviews the project record information including the Application Public Procurement Checklist answers and any supporting documentation uploaded to the Document Library. If satisfied with the information, the LAG Manager approves the application by progressing it to **Stage 07 Application Evaluation Eligibility Assessment**. Alternatively the project is reversed by the LAG Manager to Stage 05 Application IP Manager Sign Off for amending.

#### Process

- (1) **The LAG Manager reviews the system view “06 Application LAG Manager Approval”** to identify any Implementing Partner projects that are now ready for LAG Manager approval.

The screenshot shows the Microsoft Dynamics CRM interface. The browser address bar displays <https://hub.poba.ie/Leader/main.aspx#>. The page title is "Projects 00. All Proj...". The ribbon includes tabs for File, Projects, View, Charts, Add, and Customize. The "Projects" tab is active, showing a ribbon with options like New, Edit, Deactivate, Copy a Link, E-mail a Link, Run Workflow, Start Dialog, Run Report, Filter, Export to Excel, and Advanced Find. The main area displays a view titled "Projects 06 Application LAG Manager Approved". The view shows a table with the following data:

Project Ref ID	Project Name	Promoter Name	Sub Theme	Stage
01WCIP10000354	Green Earth Organics	Cork Food Market	Rural Towns	06. Application LAG Manager Approved

A red callout box points to the table with the text: "This view shows projects at Stage 06 meaning they are ready for LAG Manager approval." The bottom of the screen shows the "LAG Management" and "Project Management" sections.

(2) The LAG Manager reviews the project information and if satisfied approves the application by progressing it.

(3) Click on the **stage lookup icon**, choose **07 Application Evaluation Eligibility Assessment** and click **OK**. Then click **Save** to save the record at the new stage.

The screenshot shows the Microsoft Dynamics CRM interface for a project named 'Green Earth Organics'. The 'Stage' field is highlighted with a red arrow, and the 'Save' button is also highlighted with a red arrow. The 'Stage' field is currently set to '07. Application Evaluated (Eligibility Assessment)'. The 'Save' button is located in the top left corner of the form.

Project: Green Earth Organics

Project Ref ID: 01WCIP100000183

Promoter Name: Taste of Mallow

LAG: West Cork LPI (do not edit)

LDS: West Cork LDS (do not edit)

Indicative Grant Amount: €100,000.00

Gaeltacht Area? No

Is this an Enterprise? Yes

Project Description:

Project Name: Green Earth Organics

Description: This project is for a new organic food supermarket in Mallow.

Status: Active

Assignee: IPUSER03 West Cork (do not edit)

Stage: 07. Application Evaluated (Eligibility Assessment)

LAG Ref ID: IP1000

Call Type: Targeted

Island Area? No

Enterprise Type: Medium

New or Existing Enterprise? New

## Stage 12

### Final LAG Manager Approval of IP Projects

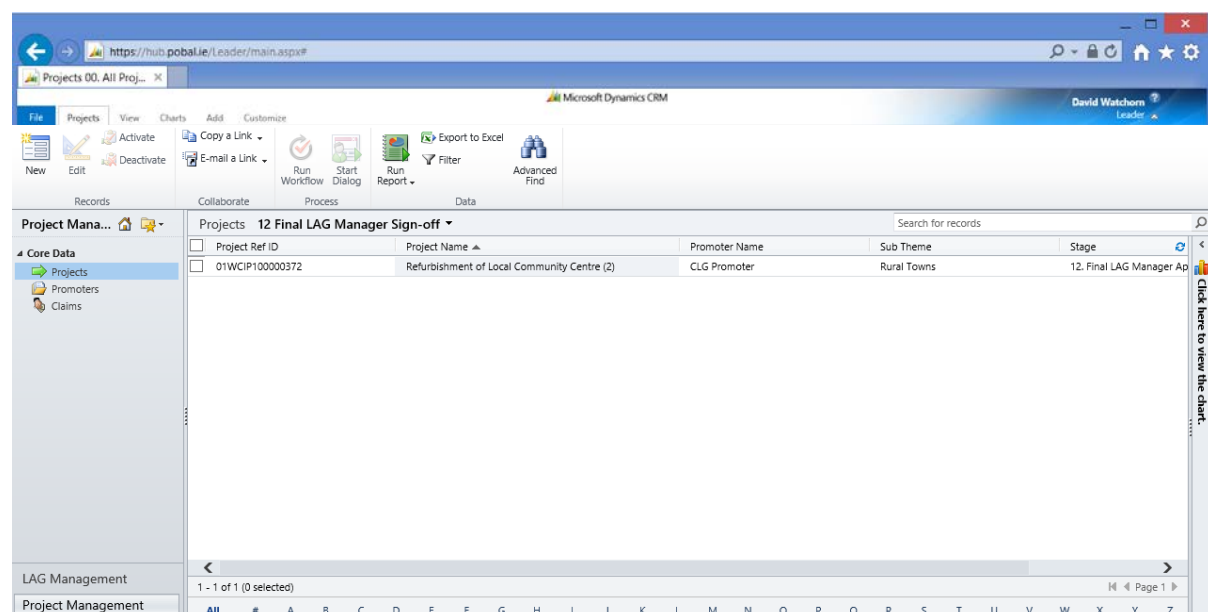
#### Overview

Stage	LAG Project User	LAG User	LAG Manager	Article 48 User	Article 48 Manager	Can Progress To Stage
<b>12 Final LAG Manager Approval of IP Projects</b> The Final Approval Checklist responses are approved by the LAG Manager. The project is then progressed to “13 Final Article 48 User Check”.			LAG Manager			↓ 13 ↓ 16 ↓ 17

At this stage, any projects created by an associated Implementing Partner must be approved by the LAG Manager. All application information will have been input by the IP staff, the first two checklists will have been answered, the LAG Board will have approved the project and the Final Checklist will have been completed. The project now appears in a view called “Stage 12 Application LAG Manager Sign Off” which is the prompt for the LAG Manager to review and sign off on it. The LAG Manager reviews the Article 48 Final Approval Checklist answers and if satisfied they sign off on the answers by progressing the project to **Stage 13 Final Article 48 User Check**. Alternatively the project is reversed by the LAG Manager to Stage 11 Final LAG or IP User Check for amending.

#### Process

- (1) The LAG Manager reviews the system view “12 Final LAG Manager Sign-Off” to identify any Implementing Partner projects that are now ready for LAG Manager sign-off.



- (2) The LAG Manager opens the IP project at **Stage 12 Final LAG Manager Approval**.

Project: Green Earth Organics

Project Ref ID: 01WCIP100000183

Promoter Name: Taste of Mallow

LAG: West Cork IP1 (do not edit)

LDS: West Cork LDS (do not edit)

Indicative Grant Amount: €100,000.00

Gaeltacht Area? ☒ No ☐ Yes

Is this an Enterprise? Yes

Enterprise Type: Medium

New or Existing Enterprise? New

Project Description:

Project Name: Green Earth Organics

Description: This project is for a new organic food supermarket in Mallow.

Status: Active

Stage: 12. Final LAG Manager Approved

(3) The LAG Manager navigates to the **Article 48 Final Approval Checklist** questions and checks the responses and any supporting documentation uploaded to the Document Library.

Project: Green Earth Organics

Art 48 Project Final Checklist

Checklist Respo...	Checklist Item	Response Date	Project Stage	Response Type	Response Comments	Article 48 Respo...	Verification
<input type="checkbox"/>	1069. Are signed copies of the LAG minutes (extract) retail...	21/01/2017	02. EOI Eligible	Yes	Yes they are on file.		
<input type="checkbox"/>	10449						
<input type="checkbox"/>	10450	21/01/2017	02. EOI Eligible	Yes			
<input type="checkbox"/>	10451	21/01/2017	02. EOI Eligible	Yes			
<input type="checkbox"/>	10452	21/01/2017	02. EOI Eligible	Yes			

1 - 4 of 21 (0 selected)

Final overall response: Complete

Final overall response comments: All requirements met.

Financials

Total Project Cost: €

Total Final Costs: €

Contribution in Kind: €

Status: Active

- (4) If the LAG Manager is satisfied with the Final Checklist answers they progress the project to the next stage. Click on **Stage**, choose **13 Final Article 48 User Check**, click **OK** and **Save**.

The screenshot shows the Microsoft Dynamics CRM interface for a project named 'Green Earth Organics'. The 'Save' button in the top ribbon is highlighted with a red arrow. The 'Stage' dropdown menu is open, showing '13. Final Art 48 User check' as the selected option, also highlighted with a red arrow. The form fields include Project Ref ID, Promoter Name, LAG, LDS, Indicative Grant Amount, Gaeltacht Area, Island Area, Enterprise Type, and Project Description.



## Notes

If there is an issue, the project is reversed to the previous stage for amending. The LAG Manager then communicates with the IP Project User or IP User in an offline process detailing the issue.

# SharePoint Document Library

## Overview

As part of the project management function within the LEADER ICT System a SharePoint document folder is being made available for each project which will house all supporting documentation relating to the project. There is one unique folder for each project. Details of who can access the project folder are detailed in the [User Roles](#) section of this guide which provides an overview of the security permissions associated with each user role. The table below details the type of documents that can be uploaded to the folder:

Content Type	Document Type
<b>01 Application</b>	01 Application Form (Declaration & State Aid Declaration) 02 Acknowledgement Letter 03 Data Protection Consent Form 04 Initial Site Inspection Report including colour photos *** 99 New Document Type Required
<b>02 Eligibility and Assessment</b>	Business Documents (Please choose) 01 Signed CHY Letter 02 CRO Check 03 VAT Status Revenue Letter *** Financial Documents (Please choose) 01 Management accounts or 3 year most recent Audited Accounts (for an existing business) 02 Income and Expenditure Statements 03 Bank Statements 04 Business and Marketing Plan 05 Matched Funding documentation 06 Bridging Finance, Co-Funding and alternative sources of funding 07 Correspondence regarding alternative sources of funding sought *** Evaluation Documents (Please choose) 01 Local Enterprise Office Notification letter 02 Displacement documentation 03 Deadweight documentation 04 Micro Enterprise documentation 05 De Minimis Letters 06 Environmental Impact Assessment Report 07 Departmental Consent and Approval eg Arts or Heritage projects *** 99 New Document Type Required
<b>03 Eligibility and Assessment (Additional for Construction Projects)</b>	01 Evidence of Ownership 02 Evidence of Current Lease 03 Evidence of Agreement (in lieu of lease) 04 Associated Maps (Map in colour) 05 Title Deeds 06 Planning Permission and Exemption

	07 Voluntary Labour Schedule 08 Independent Certificate of Valuation of Donation 09 Independent Certification of Valuation of Land Purchased *** 99 New Document Type Required
<b>04 Public Procurement</b>	01 eTender Audit Trail 02 Quotations 03 Quotation Schedule 04 Tender Report 05 Tenders (from all tendering parties) 06 Successful Tender Letter 07 Unsuccessful Tender Letters 08 Post Tendering Negotiations *** 99 New Document Type Required
<b>05 Evaluation Committee</b>	01 Evaluation Committee Board Minute Extract 02 Completed Individual and Combined Scoring Records *** 99 New Document Type Needed
<b>06 LAG Approval</b>	LAG Board Minutes Extract (Please choose) 01 Approving the Project 02 Confirming Representative Pillar and compliance with LEADER meeting quorum rules 03 Completed Individual and Combined Re-Evaluation Scoring Records *** 99 New Document Type Required
<b>07 Letter of Offer</b>	01 Completed Commencement Verification Declaration 02 Pre-Approval Site Inspection Report including colour photographs 03 Letter of Offer and Acceptance Confirmation 04 Signed Contract (LEADER Grant Agreement) *** 99 New Document Type Required
<b>08 Claim</b>	Completed Grant Payment Claim Form and Associated Documentation (Please choose) 01 Completed Grant Payment Claim Form including Completed Declaration 02 Completed Grant Payment Calculation Form *** Transaction Documents (Please choose) 01 Original Paid Invoices 02 Payment Receipts 03 Original or Certified Copies Bank Statements showing dates and payments to Suppliers 04 Signed Contracts (Services and Supplies) *** Voluntary Labour (Please choose) 01 Certificates for Voluntary Labour 02 Timesheets *** Benefit in Kind 01 Benefit in Kind Document

\*\*\*

Capital Works - Qualified Professional Certificates and Final Reports  
(Please choose)

01 Qualified Architect or Engineers Certificates

02 Qualified Architect or Engineers Final Report

\*\*\*

Promoter Financial Details (Please choose)

01 Bank Details (Promoter Bank Account details)

\*\*\*

Business Documentation (Please choose)

01 VAT Status Revenue Letter

02 Tax Clearance Access Number (Contractor or Supplier)

03 Tax Clearance Access Number (Project Promoter)

04 CRO Printout for Promoter (where relevant)

\*\*\*

Training and Course details (Please choose)

01 Course Details (Signed Attendance sheet, details of provider,  
materials used, achievements of the course participants etc.)

02 Course materials showing Programme Publicity logos

\*\*\*

Insurance (Please choose)

01 Contractor and Subcontractor's Insurance

02 Promoter's Insurance

\*\*\*

Asset Register and Storage Agreement (Please choose)

01 Asset Register

02 Storage Agreement (applies to equipment)

\*\*\*

Performance Indicators: Inputs, Outcomes and Impacts reports (Please  
choose)

01 Updated Performance Indicators, a signed and dated Inputs,  
Outcomes and Impacts Report

\*\*\*

Monitoring

01 Site Inspection Report and colour photographs

\*\*\*

Publicity (Please choose)

01 Confirmation that the Promoter has complied with LEADER Publicity  
Requirements

\*\*\*

LAG Approval for Project Amendments (Please choose)

01 LAG Approval for Use of Alternative Suppliers (if applicable)

02 Project Extension - Promoter's Written Request for a Project  
Extension)

03 Project Extension - LAG Project Contract Extension Approval Letter)

04 Reallocation of funds - Formal written request made to the LAG)

05 Reallocation of funds - Formal written request approved by the LAG)

06 LAG Board Minutes Extract confirming Approval or Rejection of  
Changes or Contract Extensions

\*\*\*

Payment

	01 Payment Acknowledgement *** 99 New Document Type Required
<b>09 Payment of Grant Stage</b>	01 A copy of EFT details on file including related bank statement 02 A copy of the acknowledgement of grant payment on file 03 Promoter's Bank Statement to verify receipt of claim payment 04 Final and completed signed checklist (Interim solution) *** 99 New Document Type Required
<b>10 Appeal</b>	01 Appeal Letter 02 Appeal Decision Letter **** 99 New Document Type Required

Let's have a look at how this works:

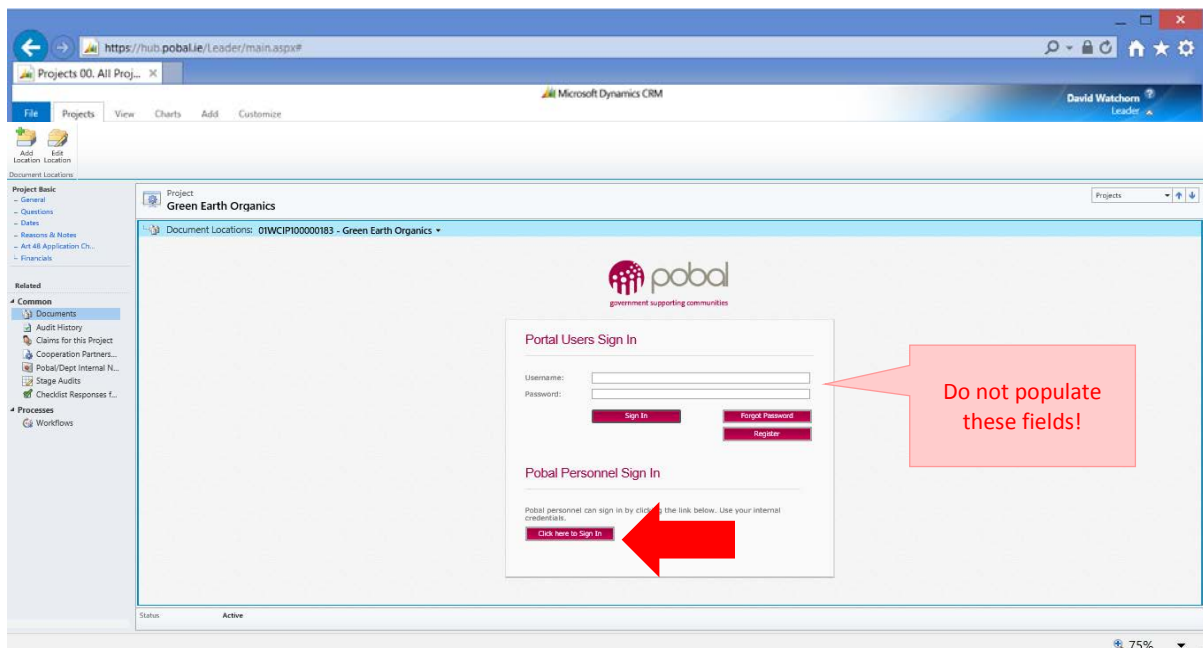
- (1) Open the **Project form** for any project. Click on the **Documents** link.

The screenshot shows the Microsoft Dynamics CRM interface. The left-hand navigation pane is expanded, showing the 'Related' section. A red arrow points to the 'Documents' link under the 'Common' category. The main area displays the 'Project' form for 'Green Earth Organics'. The form includes fields for Project Ref ID, Promoter Name, LAG, Indicative Grant Amount, Gaeltacht Area, Is this an Enterprise?, Project Description, Project Name, and Status. The 'Documents' link in the left pane is highlighted with a red arrow.

- (2) You are presented with a login screen the first time you navigate to this folder:

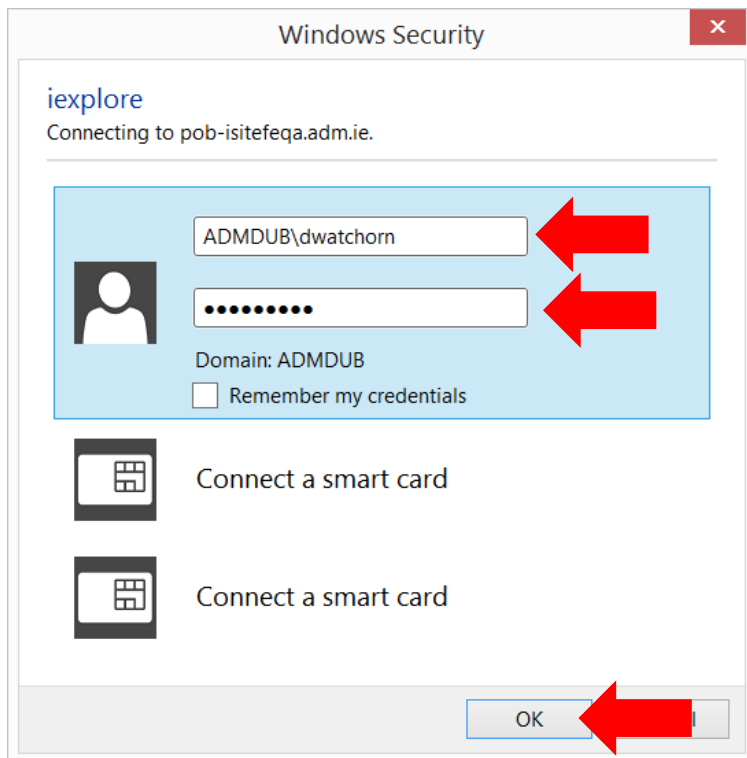
The screenshot shows the login screen for the 'Documents' folder in the Microsoft Dynamics CRM Project form for 'Green Earth Organics'. The login screen is titled 'Portal Users Sign In' and 'Pobal Personnel Sign In'. It includes fields for Username and Password, and buttons for Sign In, Forgot Password, Register, and Click here to Sign In. The 'Documents' link in the left-hand navigation pane is highlighted.

(3) Under **Pobal Personnel Sign In** choose **Click here to Sign In**:

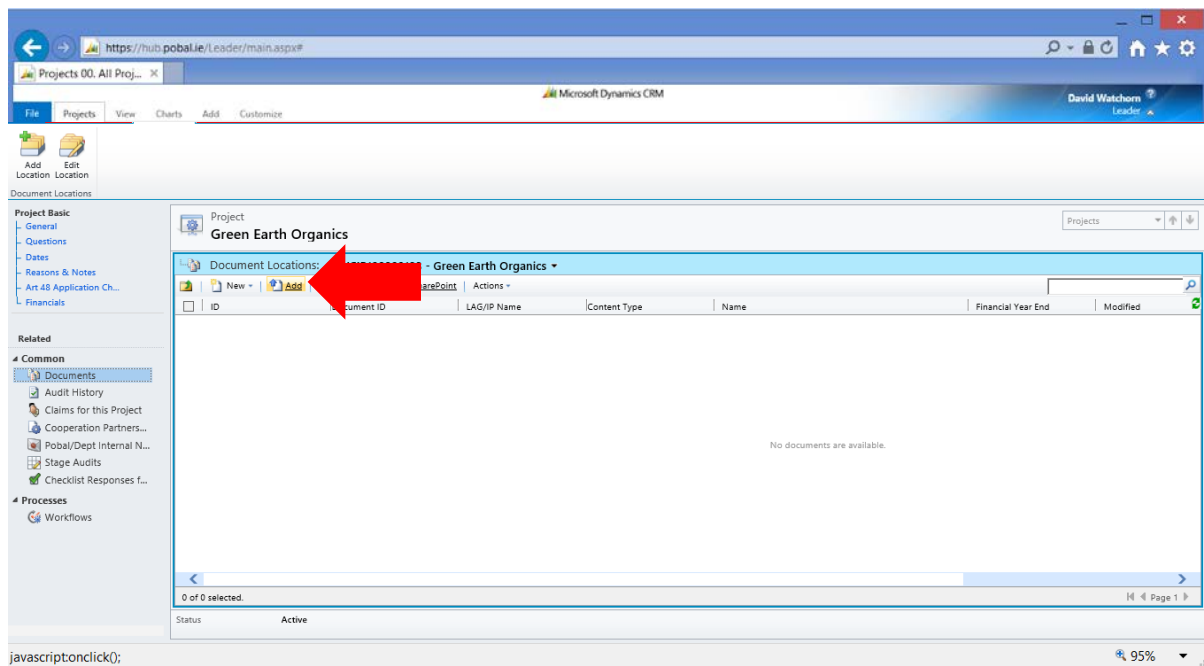


(4) The Windows Security screen opens:

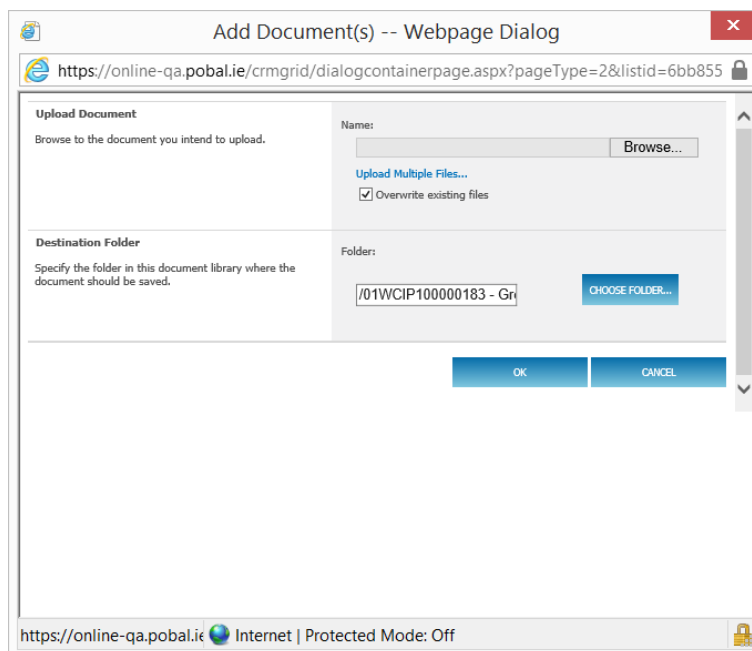
- In the first field enter **ADMDUB\** followed by your **username**
- In the second field enter your **password**
- Press **OK**.



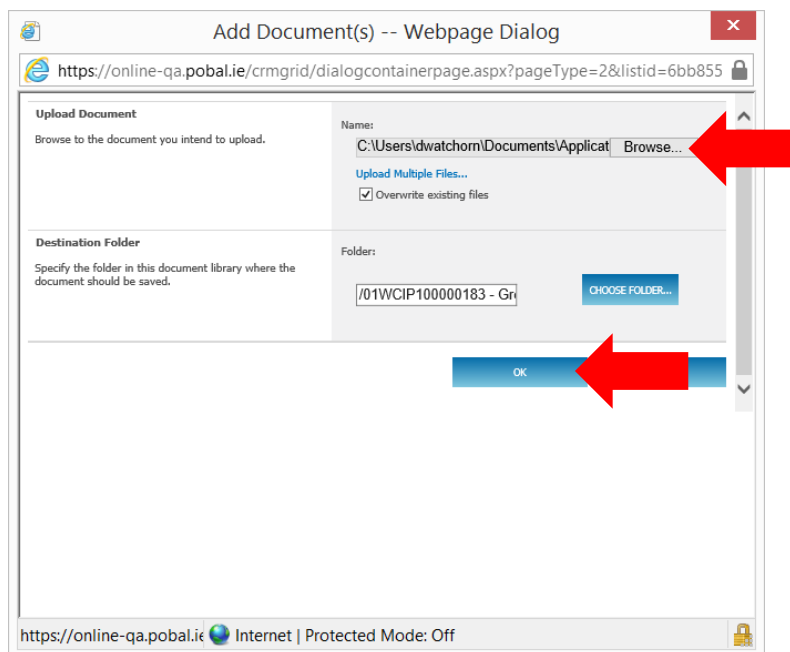
(5) To add a new document within the document folder, click **Add**.



(6) The **Add Document** dialogue box opens:

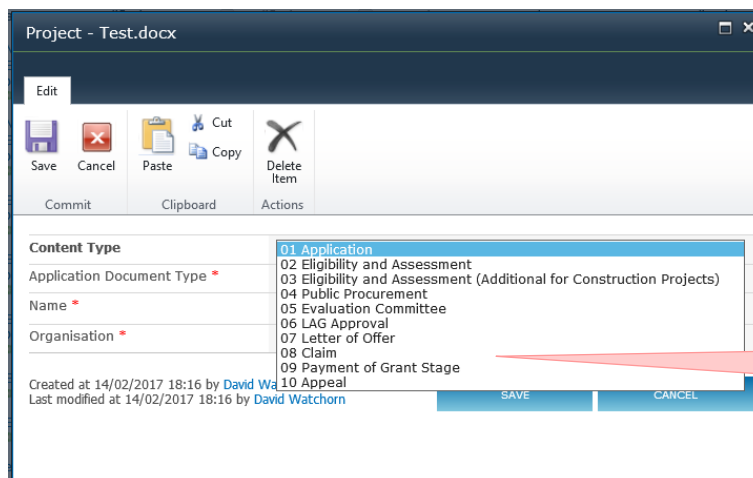


(7) Click **Browse**, locate the file to be uploaded and click **OK**.



(8) The file uploads and you are presented with a screen where you are required to categorise the document.

(9) Choose a **Content Type** from the list of options.



Choose the  
**Content Type**  
from this list.

(10) Next choose the **Document Type** from the list of options.

Project - Test.docx

Edit

Save Cancel Paste Cut Copy Delete Item

Commit Clipboard Actions

Content Type 01 Application

Application Document Type \*

Name \*

Organisation \*

Created at 14/02/2017 18:16 by David Watchorn  
Last modified at 14/02/2017 18:16 by David Watchorn

SAVE CANCEL

(11) Next choose Implementing Partner name from the list of options.

Project - Test.docx

Edit

Save Cancel Paste Cut Copy Delete Item

Commit Clipboard Actions

Content Type

Application Document Type \*

Name \*

Organisation \*

Created at 14/02/2017 18:16 by David Wa  
Last modified at 14/02/2017 18:16 by Dav

(12) The screen should now look like this.

Project - Application Form.docx

Edit

Check In Cancel Paste Cut Copy Delete Item

Commit Clipboard Actions

The document was uploaded successfully and is checked out to you. Check that the fields below are correct and that all required fields are filled out. The file will not be accessible to other users until you check in.

Content Type 01 Application

Application Document Type \* 01 Application Form (DedARATION & State Aid DedARATION)

Name \* Application Form.docx

Organisation \* Avondhu Blackwater Partnership (Cork North)

Created at 16/02/2017 16:08 by David Watchorn  
Last modified at 16/02/2017 16:08 by David Watchorn

CHECK IN CANCEL

(13) Click **Check In**.

Project - Application Form.docx

Edit

Check In Cancel Paste Cut Copy Delete Item

Commit Clipboard Actions

**i** The document was uploaded successfully and is checked out to you. Check that the fields below are correct and that all required fields are filled out. The file will not be accessible to other users until you check in.

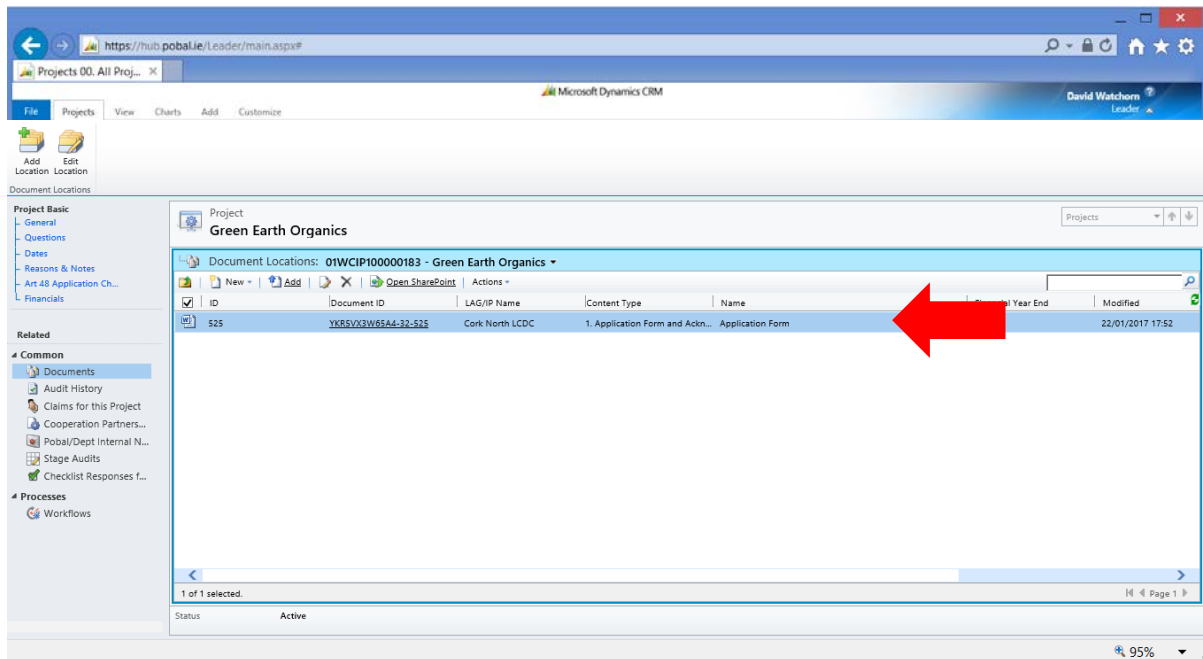
Content Type	01 Application
Application Document Type *	01 Application Form (Declaration & State Aid Declaration)
Name *	Application Form
Organisation *	Avondhu Blackwater Partnership (Cork North)

Created at 16/02/2017 16:08 by David Watchorn  
Last modified at 16/02/2017 16:08 by David Watchorn

CHECK IN

At this point you can also modify the name of the file if desired.

#### (14) The file uploads.



The screenshot shows the Microsoft Dynamics CRM interface for the 'Green Earth Organics' project. The 'Document Locations' section is active, displaying a table of documents. A red arrow points to the 'Actions' column of the table.

ID	Document ID	LAG/IP Name	Content Type	Name	Created	Modified
525	YKBSVX3W05A4-32-525	Cork North LCDC	1. Application Form and Ackn...	Application Form		22/01/2017 17:52



#### Important

- If you upload a document in error and wish for it to be deleted please email the LEADER Administrator with details.



#### Notes

- To change the name of the file or to choose a different Content Type, click on **Actions** and choose **Edit Properties**.
- To download a copy of the document click on **Actions** and choose **Download a Copy**.
- As an Implementing Partner, all of the uploaded documents to your **Projects Document Library** can be accessed by: users within your own Implementing Partner (IP Project User, IP User and IP Manager); specific staff in your associated Local Action Group (LAG User and LAG Manager); the Pobal Article 48 User and Manager; the Inspectorate and Department users. Further information is provided in the [User Roles](#) section of the User Guide.

# Troubleshooting

## Overview

If you encounter any errors in using the LEADER ICT system, please take a screenshot of the error message and email details of the issue along with the screenshot to [onlinesupport@pobal.ie](mailto:onlinesupport@pobal.ie).

## Screen Shots

To take a screenshot press the **PrintScreen** button. This button is usually the third button in from the top right of a keyboard. It may be labelled with an abbreviation "Prt Sc". This copies the active screen. Next go to your email programme and paste the image by pressing **Ctrl** and **V** on the keyboard. Alternatively you can paste the image into a Microsoft Word document and forward that document with the query.

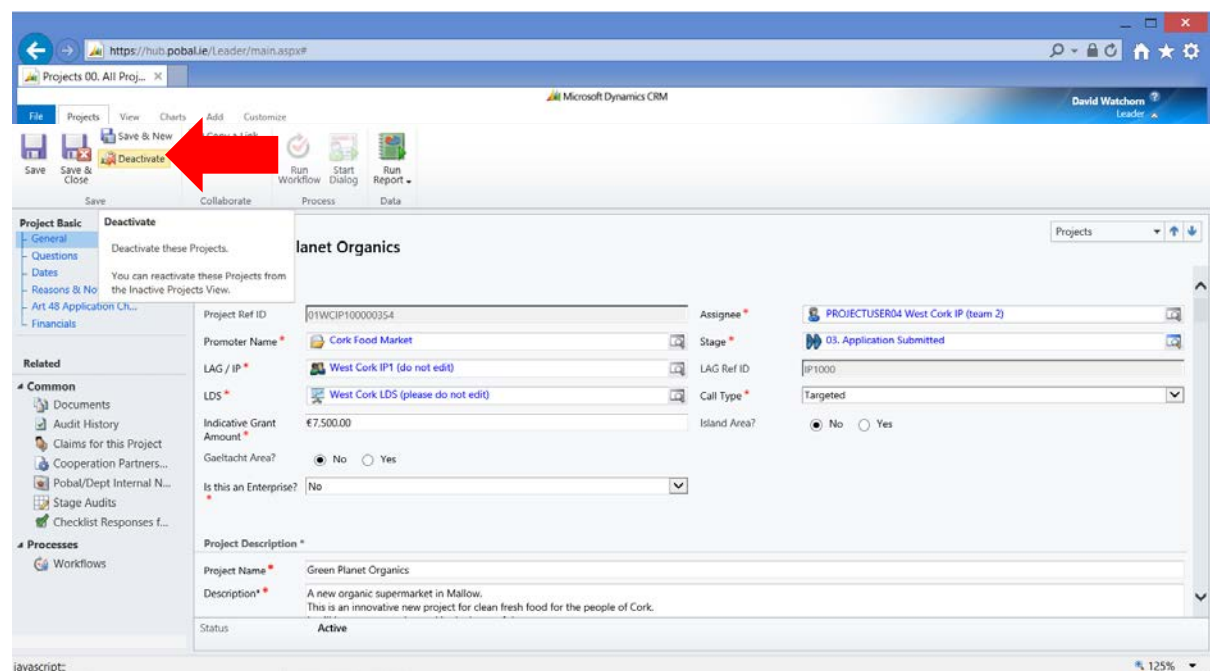
## Login Issues

It is important that the correct login page is used. Please access the LEADER ICT system via this link only: <https://hub.pobal.ie/Leader>

If you cannot access the system despite using the correct link and username and password, please take a screenshot of any error message and report the issue to Online Support on 01 5117222 or at [onlinesupport@pobal.ie](mailto:onlinesupport@pobal.ie).

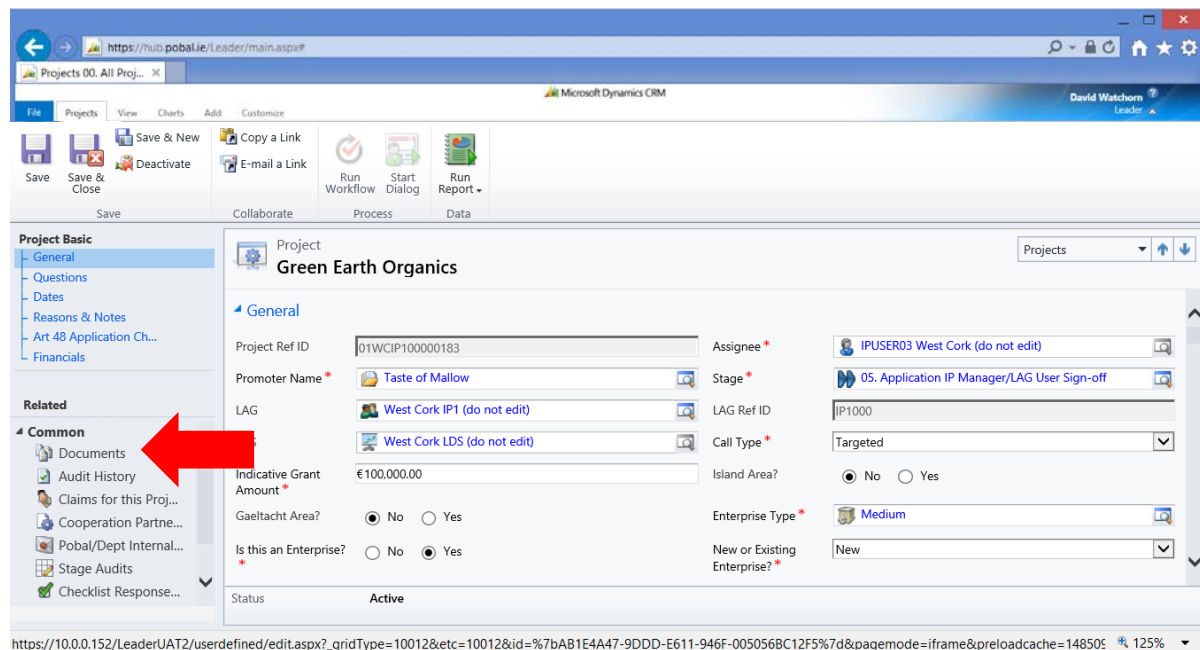
## Deactivation

If you accidentally deactivate a project record please notify the LEADER Administrator:



## SharePoint Document Libraries

There are individual SharePoint document libraries that are connected with the LEADER ICT System, these individual folders include the Local Development Strategy, Monthly Returns and Projects entities. To access these SharePoint document libraries please select **Documents** on the left hand menu from within relevant entity.



If you experience any difficulties accessing the document libraries please take a screenshot of any error message and report the issue to Online Support on 01 5117222 or at [onlinesupport@pobal.ie](mailto:onlinesupport@pobal.ie).

## SharePoint File Sizes

It is recommended that all documents uploaded to the Document Library are **less than 1MB** in size. If you find that your file is too large to upload you can try the following to reduce file size:

- Change the file format – e.g. change to PDF.
- If it is already a PDF document you can save it as a “Reduced Size PDF”.
- You can ZIP the file using appropriate software.
- If you need assistance please contact [onlinesupport@pobal.ie](mailto:onlinesupport@pobal.ie)

## SharePoint Missing Document Types

During the process of uploading documents to the SharePoint libraries you are asked to categorise the documents by selecting from the list of available document “Content Types”. If you find that an appropriate “Content Type” you can request a new document Content Type.

## Refreshing

Occasionally if you are not seeing the expected result on screen it may be a simple matter that the screen needs to be refreshed. Remember that both CRM and SharePoint are online systems so like any web page they may need to be refreshed in case this has not happened automatically. You refresh the screen by pressing F5 on the keyboard.

# Resources

## Department of Rural and Community Development

- LEADER Operating Rules / Rural Development Programme Ireland 2014-2020
- All relevant circulars issued by the Department
- [Website](#)

## Pobal

- LEADER ICT System User Guides
- [Website](#)

# Support

Query	Description	Telephone	Email
<b>Programme</b>	For all programme-related queries on LEADER	-	<a href="mailto:rdp1420@ahg.gov.ie">rdp1420@ahg.gov.ie</a>
<b>Technical / ICT</b>	For all technical queries on the LEADER CRM System	01 5117222	<a href="mailto:onlinesupport@pobal.ie">onlinesupport@pobal.ie</a>
<b>Adding and Modifying Users</b>	For adding new users, or modifying existing users. A LEADER Mandate Form must be attached with each user request.	01 5117222	<a href="mailto:onlinesupport@pobal.ie">onlinesupport@pobal.ie</a>
<b>Removing Users</b>	For removing user accounts. A LEADER Mandate Form must be attached with each user request.	01 5117222	<a href="mailto:onlinesupport@pobal.ie">onlinesupport@pobal.ie</a>



Please note that at all times, Local Action Groups and Implementing Partners are fully responsible for their active login accounts to the LEADER CRM system.

Given the sensitive nature of the information stored on the system it is very important that users have the correct level of access. It is particularly important that Pobal is informed when a LAG or IP staff member changes roles or leaves in which case their account needs to be deactivated.

Users are also reminded that they must comply with the LEADER ICT System User Policy.

# Appendix 1

## Maximum Rate of Aid and Maximum Funding By Project Type, Project Sub-Type and Applicant Type

Project Type	Project Sub-Type	Applicant Type	Maximum Rate of Aid	Maximum Funding
Capital	<ul style="list-style-type: none"> <li>N/A</li> <li>Co-operation Transnational Full</li> <li>Co-operation Inter-territorial Full</li> <li>Co-operation Cross-Border Full</li> </ul>	• Private	Up to a maximum of 50%	€200,000
	<ul style="list-style-type: none"> <li>N/A</li> <li>Co-operation Transnational Full</li> <li>Co-operation Inter-territorial Full</li> <li>Co-operation Cross-Border Full</li> </ul>	• Community	Up to a maximum of 75%	
	<ul style="list-style-type: none"> <li>N/A</li> <li>Co-operation Transnational Full</li> <li>Co-operation Inter-territorial Full</li> <li>Co-operation Cross-Border Full</li> </ul>	• Hard to reach communities	Up to a maximum of 90%	
	<ul style="list-style-type: none"> <li>Co-operation Transnational Preparatory</li> <li>Co-operation Inter-territorial Preparatory</li> <li>Co-operation Cross-Border Preparatory</li> </ul>	• Community • Hard to reach communities (LAG Projects only)	Up to a maximum of 100%	€6,000
Marketing	<ul style="list-style-type: none"> <li>N/A</li> <li>Co-operation Transnational Full</li> <li>Co-operation Inter-territorial Full</li> <li>Co-operation Cross-Border Full</li> </ul>	• Private	Up to a maximum of 50%	€200,000
	<ul style="list-style-type: none"> <li>N/A</li> <li>Co-operation Transnational Full</li> <li>Co-operation Inter-territorial Full</li> <li>Co-operation Cross-Border Full</li> </ul>	• Community	Up to a maximum of 75%	
	<ul style="list-style-type: none"> <li>N/A</li> <li>Co-operation Transnational Full</li> <li>Co-operation Inter-territorial Full</li> <li>Co-operation Cross-Border Full</li> </ul>	• Hard to reach communities	Up to a maximum of 90%	
	<ul style="list-style-type: none"> <li>Co-operation Transnational Preparatory</li> <li>Co-operation Inter-territorial Preparatory</li> <li>Co-operation Cross-Border Preparatory</li> </ul>	• Community • Hard to reach communities (LAG Projects only)	Up to a maximum of 100%	€6,000

Project Type	Project Sub-Type	Applicant Type	Maximum Rate of Aid	Maximum Funding
Large Scale Project	<ul style="list-style-type: none"> <li>• N/A</li> <li>• Co-operation Transnational Full</li> <li>• Co-operation Inter-territorial Full</li> <li>• Co-operation Cross-Border Full</li> </ul>	• <b>Community</b>	Up to a maximum of 75%	€500,000
	<ul style="list-style-type: none"> <li>• Co-operation Transnational Preparatory</li> <li>• Co-operation Inter-territorial Preparatory</li> <li>• Co-operation Cross-Border Preparatory</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Community</b></li> <li>• <b>Hard to reach communities (LAG Projects only)</b></li> </ul>	Up to a maximum of 100%	€6,000
Analysis and Development	<ul style="list-style-type: none"> <li>• N/A</li> <li>• Co-operation Transnational Full</li> <li>• Co-operation Inter-territorial Full</li> <li>• Co-operation Cross-Border Full</li> </ul>	• <b>Private</b>	Up to a maximum of 75%	€30,000
	<ul style="list-style-type: none"> <li>• N/A</li> <li>• Co-operation Transnational Full</li> <li>• Co-operation Inter-territorial Full</li> <li>• Co-operation Cross-Border Full</li> </ul>	• <b>Community</b>	Up to a maximum of 90%	€30,000
	<ul style="list-style-type: none"> <li>• Co-operation Transnational Preparatory</li> <li>• Co-operation Inter-territorial Preparatory</li> <li>• Co-operation Cross-Border Preparatory</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Community</b></li> <li>• <b>Hard to reach communities (LAG Projects only)</b></li> </ul>	Up to a maximum of 100%	€6,000
Training	<ul style="list-style-type: none"> <li>• N/A</li> <li>• Co-operation Transnational Full</li> <li>• Co-operation Inter-territorial Full</li> <li>• Co-operation Cross-Border Full</li> </ul>	• <b>Private</b>	Up to a maximum of 100%	€200,000
	<ul style="list-style-type: none"> <li>• Co-operation Transnational Preparatory</li> <li>• Co-operation Inter-territorial Preparatory</li> <li>• Co-operation Cross-Border Preparatory</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Community</b></li> <li>• <b>Hard to reach communities (LAG Projects only)</b></li> </ul>	Up to a maximum of 100%	€6,000

# Appendix 2

## Guidance on categories per Sub-Theme

### Overview

The categories for each project under all sub-themes are outlined below along with definitions and examples for guidance. Each project must be assigned to one sub-theme and then choose one primary category under Sector or Initiative within that sub-theme. There is an option for “other” where a project does not fit into any of the categories provided under each sub-theme. The list of categories for each sub-theme will be reviewed and refined on the basis of additional projects types entered under the “Other” option.

### Theme 1: Economic Development, Enterprise Development and Job Creation

The focus of theme one relates to the challenge of driving continued local economic development, including the diversification of the rural economy, to create employment opportunities for the local community, including those from disadvantaged groups.

#### Subtheme 1-1 Rural Tourism

Rural tourism is an important sector that provides a stimulus for enterprise and job creation. As tourism is based on a particular asset that is generally place-specific, for example, landscape, history, it offers significant potential, even in peripheral areas. Interventions under this sub-theme should focus on actions that have the potential to make the area more attractive for local, national and foreign visitors.

Sector or Initiative	Description
Activity or Adventure Tourism (angling, walking, cycling)	Activity based tourism projects such as walking, cycling, hiking and other physical activities. Please note this category does not include water based activities.
Agri-Tourism	Agriculture or horticulture based activities e.g. visits to working farms, farmhouse stays, promotion/sale of farm produce.
Cluster or network of Tourism Businesses	Networking projects designed to avail of linkages and synergies eg tourism hubs to facilitate a multi-sectoral approach.
Culture and Heritage Tourism	Projects focused on cultural, historic or heritage-based events or attractions.
Eco-Tourism	Projects with a positive impact on the natural environment and/or the welfare of local communities.
Food Tourism	Culinary attractions/events aimed at tourists, such as food trails and food tours.

Health and Wellness Tourism	Projects that promote health and well-being, for example spas and specialised retreats.
Marine and Water-based Tourism	Projects centred on Ireland's coastal and inland waters as attractions, including angling, surfing, sailing and water-sports.
Promotion of area as "destination" (website development etc.)	Projects that promote an area through, for example, marketing, branding, website development, app development etc. to increase number of visitors to an area.
Other	If the rural tourism project does not fit in one of the above categories please specify the nature of the project.

### Subtheme 1-2 Enterprise Development

To support the diversification of the rural economy, the CEDRA report (2014) identifies potential sectors for future enterprise development in recognition that SMEs in rural areas face key challenges, as they are disproportionately at risk of closure with the economic downturn. In the context of Priority 6, the development of inclusive models of business support is an important tool to realise the potential of groups who are underrepresented in enterprise, for example, women, young people and people with a disability.

Sector or Initiative	Description
Activity or Adventure Tourism (angling, walking, cycling)	Activity based tourism projects such as walking, cycling, hiking and other physical activities. Please note this category does not include water based activities.
Agricultural Diversification	Entrepreneurial use of farm resources for non-agricultural purposes, for example, farm shops, recreational activities etc.
Creative Industries	Enterprises relating to creative industries including traditional crafts, design, visual and performing arts, music, film, TV, radio etc.
Food & Beverage	Enterprises relating to the food and beverage industry, e.g. Speciality foods and beverages, artisan foods, craft beers etc.
Hospitality	Enterprises in the hospitality industry including hotels, accommodation, lodgings. Please note this category does not include restaurants and pubs.
ICT	Enterprises in the field of ICT including website, application, software development etc.
Marine Diversification (e.g. fish smoking)	Entrepreneurial projects relating to diversifying activities/products in the marine sector, e.g. fish smoking, diversified fish products, seaweed cultivation/products etc.
Social Enterprise	Enterprises set up to achieve social, community and/or environmental benefits.

Other	If the enterprise development project does not fit in one of the above categories please specify the nature of the project.
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### Sub-Theme 1-3 Rural Towns

This sub-theme supports the regeneration of rural towns by promoting them as attractive places to visit, live and do business in. The CEDRA (2014) report outlines how many rural towns felt the impact of the economic downturn more acutely than urban areas, with high levels of unemployment and poverty. LEADER is particularly suited to revitalising rural towns through co-ordinating an integrated approach that builds on the economic strengths and infrastructure of the area.

Sector or Initiative	Description
<b>Development of community/recreation spaces</b>	Development of community facilities, green areas, parks, sporting facilities, children's playgrounds etc.
<b>Development of festivals</b>	Development of festivals to re-invigorate rural towns, e.g. historical, cultural, music, food or sporting festivals.
<b>Development of markets</b>	Development/promotion of market events such as farmers markets, craft markets etc. to re-invigorate rural town and promote local produce.
<b>Maintenance or Restoration or Upgrading of built environment in town</b>	Projects/town renewal schemes that renovate derelict buildings with incentives to attract businesses to vacant properties.
<b>Streetscape enhancement</b>	Projects to create a more pleasant and functional physical environment in rural towns, e.g. planting trees, benches, lighting, paving etc.
<b>Tidy Towns</b>	Participants in the National or Local Tidy Towns competitions.
<b>Other</b>	If the rural towns project does not fit in one of the above categories please specify the nature of the project.

### Sub-Theme 1-4 Broadband

Given the extent of work that is conducted online, increased access to reliable and high-speed broadband is vital for the economic and social development of rural areas and communities. This sub-theme supports local actions that complement the national initiatives tasked with developing a comprehensive rural broadband infrastructure. This sub-theme supports the regeneration of rural towns by promoting them as attractive places to visit, live and do business in. The CEDRA (2014) report outlines how many rural towns felt the impact of the economic downturn more acutely than urban areas, with high levels of unemployment and poverty. LEADER is particularly suited to revitalising rural towns through co-ordinating an integrated approach that builds on the economic strengths and infrastructure of the area.

Sector or Initiative	Description
<b>Action Plans or Feasibility studies</b>	Feasibility studies/action plans in relation to community broadband, improving local access to broadband.
<b>Capacity building or Training</b>	Basic ICT training to priority groups, for example, to enable older people and young people to stay connected.
<b>Development of community or recreation spaces</b>	Development of community facilities, green areas, parks, sporting facilities, children's playgrounds etc.
<b>Skills Development projects</b>	Up-skilling within local communities in technical aspects relating to broadband installation.
<b>Small scale equipment projects</b>	Small scale equipment such as boosters, routers etc. for local businesses.
<b>Other (please specify)</b>	If the Broadband project does not fit in one of the above categories please specify the nature of the project.

## Theme 2: Economic Social Inclusion

The focus of theme two, relates to promoting the cohesion of the sub-regional area not only from an economic development perspective but also in relation to fostering social inclusion. In rural areas, the low density of population, high levels of out-migration and distance from urban centres, results in fewer employment options and lower levels of service provision than in urban areas. Given the extent of work that is conducted online, increased access to reliable and high-speed broadband is vital for the economic and social development of rural areas and communities. This

### Sub-Theme 2-1 Provision of basic services targeted at hard to reach communities

This sub-theme addresses a lack of access to basic services, for people living in rural and remote areas and groups who are at risk of social exclusion. In some cases, the particular service may have never existed in the locality or has been withdrawn. In rural areas, people's experience of exclusion is often compounded by physical isolation. The type of actions supported may involve establishing a new service for hard to reach communities, or improving access to existing services. Projects under this sub-theme must be aimed at the target groups identified under LEADER).

Sector or Initiative	Description
<b>Bereavement or Suicide-prevention Services</b>	Services providing supports and information around suicide prevention and bereavement.
<b>Education or Training</b>	New or existing Education or training courses specifically targeting people at risk of social exclusion (from LEADER target groups).
<b>Health</b>	Initiatives to improve access for target groups to health services.
<b>Personal support Services</b>	Services providing personal supports such as counselling, family supports, mental health services, addiction services.
<b>Recreational or Physical Amenities</b>	Creating or improving access to recreational amenities such as sporting facilities, dance, exercise, gyms etc.
<b>Retail or Financial Services</b>	Creating or improving access to services aimed at target groups in the area of retail or financial services.
<b>Social or Community Amenities</b>	Creating or improving access to social and community amenities such as community halls, parent & toddler groups, community coffee mornings, community information events etc.
<b>Transport</b>	Local or rural transport initiatives such as car-shares, community/voluntary car schemes. Please note this category does not include purchase of vehicles.
<b>Other (please specify)</b>	If the basic services project does not fit in one of the above categories please specify the nature of the project.

## Sub-Theme 2-2 Rural Youth

The significant increase in unemployment levels across many EU countries has had a severe impact on young people. The promotion of youth entrepreneurship and associated training can provide improved pathways for young people to access economic opportunities in rural areas. In addition, actions that develop the social infrastructure of rural areas provide important opportunities for young people to realise their potential. In the context of LEADER, young people are defined as people aged 15 to 35 years.

Sector or Initiative	Description
<b>Access to ICT</b>	Projects providing opportunities for improved access to IT for young people.
<b>Arts</b>	Projects providing creative and arts based activities for young people.
<b>Sport or Recreation</b>	Projects providing sporting and recreation activities for young people.
<b>Youth Clubs or Cafés</b>	Provision of youth clubs and cafes for young people to gather and socialise in a safe, secure and supportive environment with a range of services provided.
<b>Youth Development</b>	Youth work and development initiatives, for example, afterschool clubs, summer camps, school transition programmes etc.
<b>Youth Entrepreneurship</b>	Information, capacity building, training to enable young people to develop skills in business start-up and enterprise.
<b>Other (please specify)</b>	If the rural youth project does not fit in one of the above categories please specify the nature of the project.

### Theme 3: Rural Environment

Theme three is focused on maximising the potential of the environment to contribute to the sustainable development of rural Ireland.

#### Sub-Theme 3-1 Water Resources

Greater protection of local water resources is essential for sustaining rural communities. Environmental schemes have the potential to play a pivotal role in addressing pressures on water reserves and in supporting the local community to conserve this valuable resource.

Sector or Initiative	Description
Local action plans/feasibility studies	Projects that will develop local water conservation plans and/or feasibility studies.
Technical capacity building/training	Capacity building on the technical aspects of water conservation/recycling schemes.
Water conservation education/awareness	Projects that raise local awareness about water conservation or water recycling.
Water conservation initiatives	Practical initiatives that conserve water (e.g. rainwater harvesting or use of greywater for fertiliser and general washing).
Other (Please specify)	If the water resources project does not fit in one of the above categories please specify the nature of the project.

#### Sub-Theme 3-2 Local Biodiversity

Biodiversity, which encompasses natural wildlife, flora and fauna, is an important foundation to the healthy functioning of ecosystems. The protection of biodiversity is a growing concern, with the loss of various species of wildlife, flora and fauna as well as their natural habitat. Factors that impact on local biodiversity include population growth, cutting hedgerows and changes in land usage.

Sector or Initiative	Description
Biodiversity protection education or awareness	Projects that raise local awareness and provide guidance on how to protect biodiversity domestically.
Environmental improvement initiatives	Practical initiatives that support biodiversity and environmental improvements, e.g. upgrading parks and river walks, establishment of nature corridors, habitat creation and planting of native species.
Local action plans/feasibility studies	Projects that will develop action plans and/or feasibility studies that enhance and protect particular aspects of biodiversity.
Other (Please specify)	If the biodiversity project does not fit in one of the above categories please specify the nature of the project.

### Sub-Theme 3-3 Renewable Energy

Clean sources of energy have a lower environmental impact on nature than conventional energy technologies. This sub-theme is premised on the need to mitigate against the impact of recent environmental trends, which include climate change. It is considered that community-based initiatives will play a key role in realising national and EU environmental targets, particularly in the reduction of carbon dioxide emissions through energy infrastructure. In addition, renewable energy technologies have the potential to generate new employment opportunities in rural areas.

Sector or Initiative	Description
<b>Local action plans/feasibility studies</b>	Projects that will develop action plans and feasibility studies in relation to renewable energy sources and green technologies.
<b>Practical sustainable energy initiatives</b>	Practical initiatives that deliver sustainable energy alternatives (e.g. solar power, biomass heating, community wind farms and community based heating systems).
<b>Renewable energy education/awareness</b>	Projects that raise local awareness and provide practical guidance on environmental issues and green technologies.
<b>Technical capacity building/training</b>	Capacity building actions may focus on the practical installation and use of renewable energy technologies.
<b>Other (please specify)</b>	If the renewable energy project does not fit in one of the above categories please specify the nature of the project.



