

Circular No: 03/2018

From: LEADER Unit

To: All LAGs and Implementing Partners

Date Issued: 24/04/2018

Subject: Projects Involving Different Rates of Grant Aid

Where the LAG decides to award differing rates of aid to project elements, each element must be entered on the LEADER IT system under separate project reference numbers. Recent developments on the IT system have made it possible to link these projects. See attached instructions.

LAGs are reminded of the €1,250 minimum funding grant threshold for a project as per Operating Rule 9.1.

Copies of all standard project related material must be uploaded to the document repository under each project number, including the Standardised Application Form and related checklist.

Cross-referenced notes must be added to each of the related projects.

This circular is effective from the above date.



How to Link Projects Guide

The 'linking' of projects is used to accommodate a scenario where a project falls under two different "Project Types" (e.g. capital and training).

The two elements of the project are essentially split and set up individually on the ICT system (as based on the 2 different Project Types), but will now be related to one another via the new "Linked Project ID".

From a reporting and data integrity perspective it is important that all associated projects (which meet this criteria) are now linked on the ICT system.

Here is the procedure for how to link two related projects:

- (1) The Project User or User creates the first project with a particular Project Type.

Note that this field defaults to "No"

Field	Value
Project Ref ID	07LDSSEC2000640
Promoter Name	Taste of Mallow
LAG / IP	Cork West IP
LDS	Cork West LDS
Indicative Grant Amount	€ 10,000.00
Gaeltacht Area?	No
Island Area?	No
Last Saved By	Test IP Project User
Does Project have two types?	No
Assignee	Test IP Project User
Stage	02. EOI Eligible
LAG Ref ID	SEC2
Call Type	Targeted
Is this an Enterprise?	Yes
Is this a Social Enterprise?	Yes
Enterprise type	Medium
New or Existing Enterprise?	New
Last Saved Date	28/02/2018
Linked Project	
Project Name	Green Earth Organics (Capital)
Description	This project is for the capital element of a new organic supermarket in Mallow.
Primary Local Objective	(01) Enterprise Development Local Objective
Theme	Rural Economic Development, Enterprise Development And Job Creation
Sub Theme	Enterprise Development
Sector/Initiative	Food & Beverage
Project Type	Capital
Maximum Funding	€200,000.00
Project Sub-Type	N/A
Payment Approach	Single (full payment)
Applicant Type	Private
Maximum Rate of Aid %	50
Actual Rate of Aid %	50.00
Source of Public Matching funding	Enterprise Ireland
Is Provisional Approval required for Procurement?	No

(2) Next the same Project User or User creates the second project which has a different Project Type

Project: Green Earth Organics (Analysis and Development)

General

Project Ref ID: 07LDR5EC200841

Assignee: Test IP Project User

Promoter Name: Taste of Mallow

Stage: 02. EC4 Eligible

LAG / IP: Cork West IP

LAG Ref ID: SEC7

LDS: Cork West LDS

Call Type: Targeted

Indicative Grant Amount: €10,000.00

Is this an Enterprise? Yes

Gaeltacht Area? ☒ No ☐ Yes

Is this a Social Enterprise? Yes

Island Area? ☒ No ☐ Yes

Enterprise Type: Medium

New or Existing Enterprise? New

Last Saved By: Test IP Project User

Last Saved Date: 26/02/2018

Does Project have two types? No

Linked Project:

Project

Project Name: Green Earth Organics (Analysis and Development)

Description: This project is for the analysis and development element of a new organic supermarket in Mallow.

Primary Local Objective: (01) Enterprise Development Local Objective

Theme: Rural Economic Development, Enterprise Development And Job Creation

Sub Theme: Enterprise Development

Sector/Initiative: Food & Beverage

Project Type: Analysis and Development

Applicant Type: Private

Maximum Funding: €10,000.00

Maximum Rate of Aid %: 75

Project Sub-Type: N/A

Actual Rate of Aid %: 50.00

Payment Approach: Single (full payment)

Source of Public Matching funding: Enterprise Ireland

Is Provisional Approval required for Procurement? No

- (3) The user chooses one of the projects and updates the “Does Project have two types?” field to “Yes”.

The screenshot shows the Microsoft Dynamics CRM interface for a project named "Green Earth Organics (Capital)". The left sidebar contains a navigation pane with "Project Basic" and "Related" sections. The "Related" section includes "Common" and "Processes" sub-sections. The "Common" sub-section has a red arrow pointing to the "Does Project have two types?" field, which is currently set to "Yes". The "Processes" sub-section is also visible. The main area displays the project details, including fields for Project Ref ID, Promoter Name, LAG / IP, LDS, Indicative Grant Amount, Gxeltacht Area, Island Area, Assignee, Stage, LAG Ref ID, Call Type, Is this an Enterprise?, Is this a Social Enterprise, Enterprise Type, New or Existing Enterprise?, Last Saved By, Last Saved Date, and Linked Project.

- (4) Next click the Linked Project lookup icon.

The screenshot shows the same Microsoft Dynamics CRM interface for the "Green Earth Organics (Capital)" project. The "Does Project have two types?" field is still set to "Yes". A red arrow points to the "Linked Project" field, which is currently set to "None". The "Linked Project" field has a lookup icon (a magnifying glass) next to it, which is the icon mentioned in the instruction.

(5) The lookup box opens.

Look Up Record-- Web page Dialogue

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 ☐ Show Only My Records

View: Possible projects

Search: Search for records

Project Ref ID	Project Name
☐ 07LDRSEC200599	Green Earth Organics (6)
☐ 07LDRSEC200610	Project to test checklist generation (2)
☐ 07LDRSEC200706	Project for LDS Example
☐ 07LDRSEC200828	Project to test Sector or Initiative
☐ 07LDRSEC200832	Project to test Provisional LAG Appro...
☐ 07LDRSEC200838	Project to test *Does Project have tw...
☐ 07LDRSEC200839	Project to test mandatory TRN
☐ 07LDRSEC200692	Example project
☐ 07LDRSEC200694	new test project
☐ 07LDRSEC200695	Project
☐ 07LDRSEC200657	Name
☐ 07LDRSEC200658	Name
☐ 07LDRSEC200614	A refurbishment project

1 - 40 (0 selected)

Properties New

OK Cancel Remove Value

https://10.0.0.152/LeaderPhase2UAT/.c Internet | Protected Mode: Off

The lookup box has a special view called "Possible Projects" that shows just the projects created by the same user and at Stages 01 & 02 and hence available for linking.

(6) The user now searches for the second project to be linked to using the Project Reference ID for that second project.

Look Up Record-- Web page Dialogue

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 ☐ Show Only My Records

View: Possible projects

Search: 07LDRSEC200841

Project Ref ID	Project Name
☐ 07LDRSEC200841	Green Earth Organics (Analysis and D...

1 - 1 (0 selected)

Properties New

OK Cancel Remove Value

https://10.0.0.152/LeaderPhase2UAT/.c Internet | Protected Mode: Off

(7) Put a tick beside the project and click OK

Look Up Record -- Web page Dialogue

https://10.0.0.152/LeaderPhase2UAT/_controls/lookup/lookupinfo.aspx?AllowFilterOff=0 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: Project ☐ Show Only My Records

View: Possible projects

Search: 07LDRSEC200841

Project Ref ID	Project Name
☒ 07LDRSEC200841	Green Earth Organics (Analysis and D...

1 - 1 (1 selected) Page 1

Properties New

OK Remove Value

https://10.0.0.152/LeaderPhase2UAT/_c Internet Protected Mode: Off

(8) The name of the second project populates into the Linked Project field.

Microsoft Dynamics CRM

Project Basic

Project: Green Earth Organics (Capital)

General

Project Ref ID: 07LDRSEC200840

Promoter Name: Taste of Mallow

LAG / IP: Cork West IP

LDS: Cork West LDS

Indicative Grant Amount: €10,000.00

Geolacat Area? ☐ No ☐ Yes

Island Area? ☐ No ☐ Yes

Last Saved By: Test IP Project User

Does Project have two types? Yes

Status: Active

Assignee: Test IP Project User

Stage: 02. ECA Eligible

LAG Ref ID: SEC2

Call Type: Targeted

Is this an Enterprise? Yes

Is this a Social Enterprise? Yes

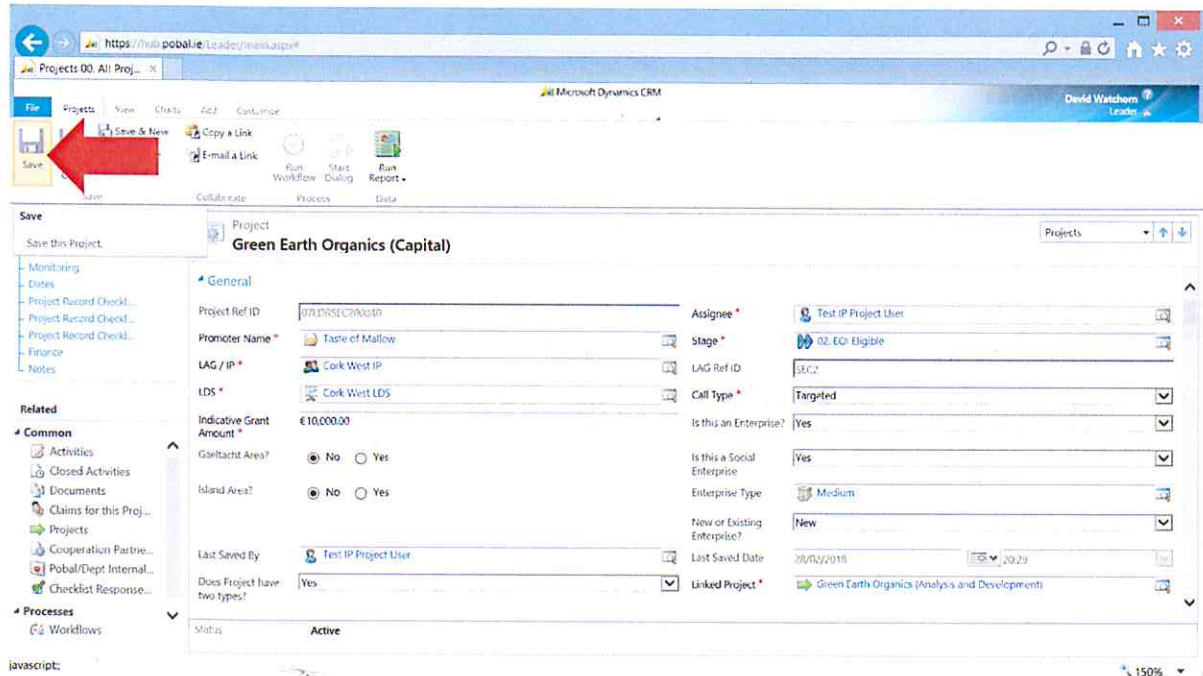
Enterprise Type: Medium

New or Existing Enterprise? New

Last Saved Date: 20/02/2010 20:29

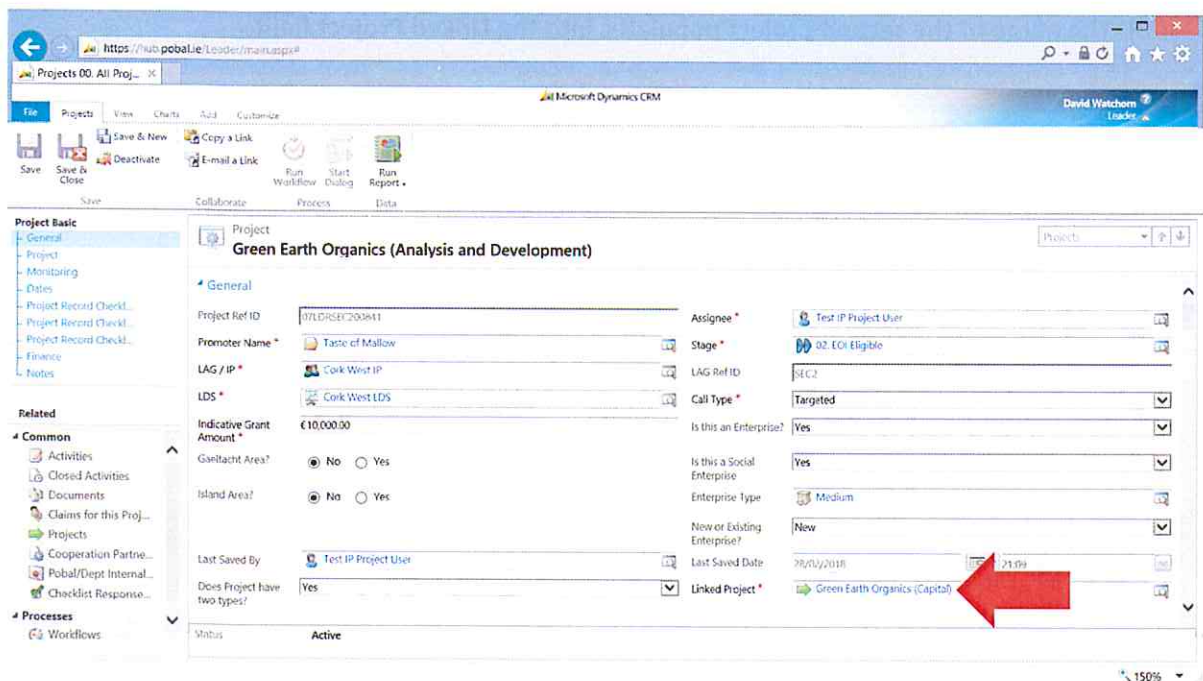
Linked Project: Green Earth Organics (Analysis and Development)

(9) Click Save.



The screenshot shows the Microsoft Dynamics CRM interface. A red arrow points to the 'Save' button in the top-left corner of the ribbon. The main form is titled 'Green Earth Organics (Capital)'. The 'General' tab is active, showing fields for Project Ref ID, Promoter Name, LAG / IP, LDS, Indicative Grant Amount, and various checkboxes for Enterprise status. The 'Status' field is set to 'Active'.

(10) The two projects are now linked. If you navigate to the second project you can see that the system has conveniently completed the linking for you.



The screenshot shows the Microsoft Dynamics CRM interface for the 'Green Earth Organics (Analysis and Development)' project. The 'General' tab is active. The 'Linked Project' field is populated with 'Green Earth Organics (Capital)', indicated by a red arrow. The 'Status' field is set to 'Active'.



Important to Note:

- The same user must create both projects that are to be linked
- The two projects must have different "Project Types"
- The two projects must be at Stages 01 or 02 to be linked
- A maximum of two projects can be linked this way
- For projects that have progressed beyond Stage 02, please contact the LEADER