

NE OPS Guidance

2. Creating a Project

**NORTH
OF TYNE**



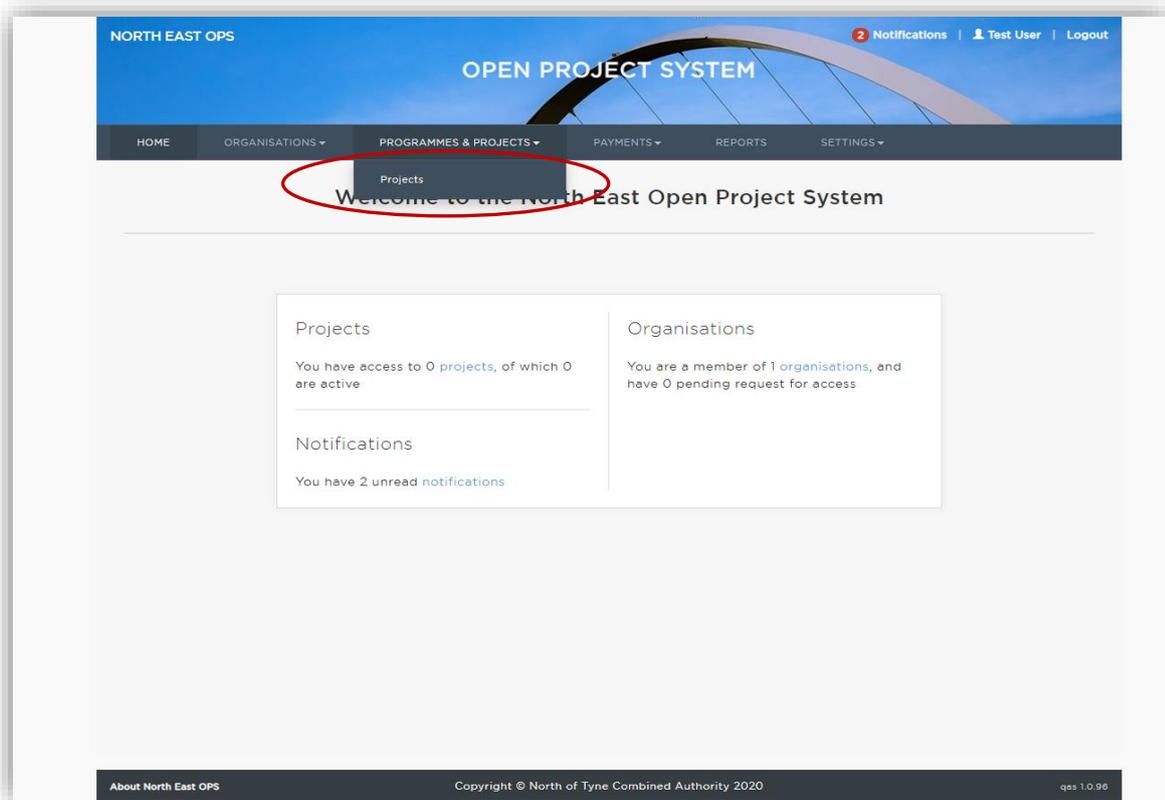
**COMBINED
AUTHORITY**

North East
Local Enterprise Partnership

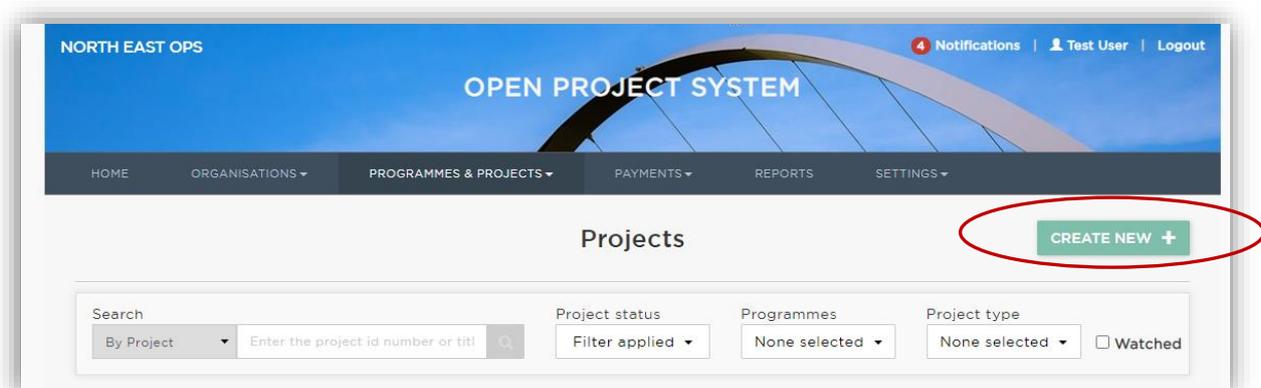


1. Creating a Project

Once you have registered and been approved on NE OPS, you will be able to login and view the home dashboard. From here you can manage your organisation (add or remove new users), view the status of claim payments, view existing projects, and create new projects.



First navigate to the projects section by selecting **Projects** from the **Programmes and Projects** dropdown menu. This screen contains all live projects and projects in progress. If you currently have no projects, this section will be blank.



From here, select **Create New +** to create a new project. You will then be presented with a screen allowing you to enter the key project details, such as the programme the project belongs to and the project title.

The screenshot shows the 'Enter project details' form in the 'OPEN PROJECT SYSTEM'. The header includes 'NORTH EAST OPS' and '4 Notifications | Test User | Logout'. The navigation bar contains 'HOME', 'ORGANISATIONS', 'PROGRAMMES & PROJECTS', 'PAYMENTS', 'REPORTS', and 'SETTINGS'. The form fields are:

- Select a programme for the project:** A dropdown menu with the placeholder text 'Select a programme'.
- Which organisation are you creating the project for?:** A text input field with the placeholder text 'Select a organisation'.
- Project title:** A text input field with the placeholder text 'e.g. name of site'.
- Select the type of project you want to create:** A text input field with the placeholder text 'Select a template'.

At the bottom of the form are two buttons: a grey 'SAVE' button and a blue 'Cancel' link. The footer contains 'About North East OPS', 'Copyright © North of Tyne Combined Authority 2020', and 'ops 1.0.96'.

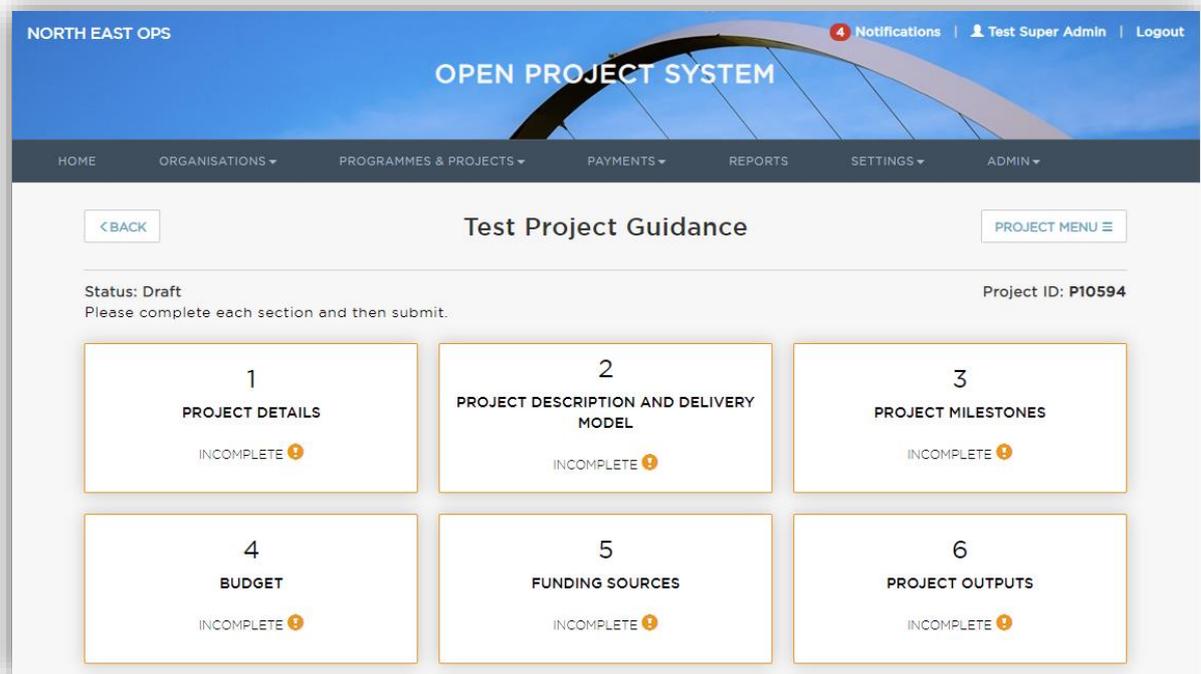
Select a programme of funding that your project falls under, for example the North of Tyne Investment Fund. Select the type of project you wish to create. Choose these options carefully, as they will determine the types of questions and information you will be asked for in the application stage.

If you are unsure about which programme or project type to select, please speak to your named contact at North of Tyne Combined Authority (NTCA) or North East Local Enterprise Partnership (NELEP) or email NE OPS@northoftyne-ca.gov.uk.

2. An Introduction to Blocks

Once you have entered the title of the project and selected the programme and project type, you will be presented with the project overview screen. This is divided into numbered sections called **blocks**. Each block requires different pieces of information that form the application. This can include milestones, budget, and outputs alongside answers to questions relevant to the application.

The structure and content of these blocks is determined by the **programme for the project** selected on the **Enter project details** screen in the previous step.



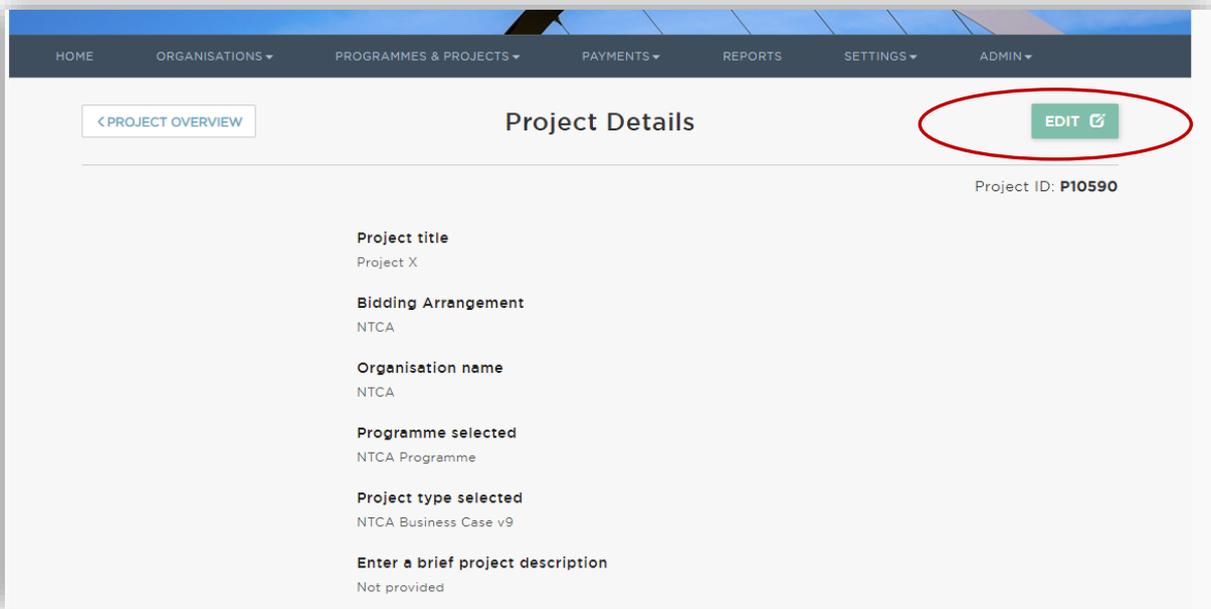
To progress and eventually submit the application, you must complete the blocks by filling in all the information required. You can complete the blocks in any order, and you can complete the application in stages. You can save your progress and revisit the application at any time. Once a block has been populated with information, its status will change from 'incomplete' to 'complete'. – See below for an example of the project milestones block prior to (left) and after (right) completion.



Please note that even if a block's status changes from 'incomplete' to 'complete', it does not always mean that all information needed to assess an application has been provided. For example, in the milestones block only project start and end dates are compulsory for the block to be marked as complete. However, more detail is usually required to gain the full picture of the application required for assessment. It is down to you, as the applicant, to provide a sufficient level of detail to enable your application to be properly assessed.

3. Project Details

The **Project Details** block contains basic information about the project. This includes the project description, address, and primary contact information. To enter the **Project Details**, block from the project overview screen, simply click any area of block. This will bring up the screen displayed below.



To modify the block, first click the  button at the top right of the screen (highlighted above).

To return to the **Project Overview** screen, simply click the  button in the top left. These buttons are consistent across all blocks within NE OPS.

It should be noted that the main lead for the project is the strategic lead responsible for sign off, whereas the project manager field should be used to denote the day-to-day lead for the project.

3.1 Themes and Workstreams

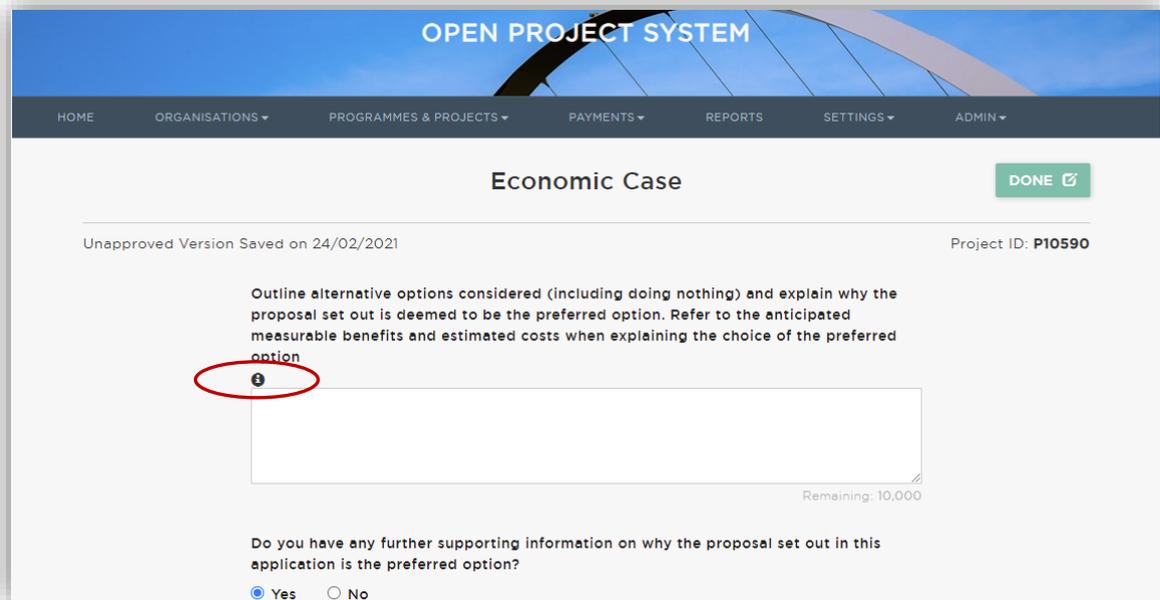
Each investment Fund Project at North of Tyne falls under a theme and a workstream – if you know what Theme and Workstream your project falls under, you can add these here, otherwise leave them blank and they will be completed by a member of the North of Tyne team.

4. Question blocks

There are often multiple question blocks included in a project application process, each containing one or more questions. These questions take a variety of forms including open free text responses, short text answers, drop down options, yes or no questions, checkboxes, or document attachments.

Some questions have a tooltip to provide more information to help applications complete the section. The tooltip icon is highlighted in the image above. Hover over the **(i)** symbol to reveal further information about the question.

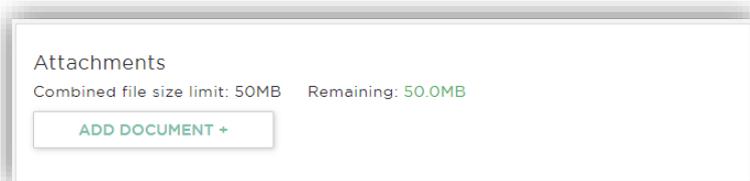
Some questions contain links to documentation to be downloaded and reviewed in the process of answering the question. In some instances, there is also a requirement to download a document, complete it and reupload it as part of the application. This will be made clear within the relevant question.



The screenshot shows a web interface for the 'OPEN PROJECT SYSTEM'. The main heading is 'Economic Case'. Below the heading, there is a status bar indicating 'Unapproved Version Saved on 24/02/2021' and 'Project ID: P10590'. The main question text reads: 'Outline alternative options considered (including doing nothing) and explain why the proposal set out is deemed to be the preferred option. Refer to the anticipated measurable benefits and estimated costs when explaining the choice of the preferred option'. A red circle highlights a tooltip icon (an 'i' in a square) located below the question text. Below the question is a large text input area with a 'Remaining: 10,000' character count. At the bottom of the form, there is a question: 'Do you have any further supporting information on why the proposal set out in this application is the preferred option?' with radio buttons for 'Yes' (selected) and 'No'.

4.1 Add Documents

Documents can be attached to support an application or to provide supplementary information (see below). There may be a limit to the total file size and/or the number of files that can be uploaded, depending on what is being asked. If this is an issue, please speak to your named contact or email NE OPS@northoftyne-ca.gov.uk.



The screenshot shows a section titled 'Attachments'. Below the title, it states 'Combined file size limit: 50MB' and 'Remaining: 50.0MB'. There is a green button labeled 'ADD DOCUMENT +'.

Please note the block completion principle outlined above also applies to question blocks. A block may be marked as 'complete' by the system when the questions have been answered, but this does not mean that a sufficient level of detail has been provided. It is the applicant's responsibility to ensure questions are answered in enough detail.

The questions in OPS contain a character limit count. These serve as a tool to keep answers to a reasonable length and encourage succinct writing. If you need to provide more written information in answer to a question, please create a separate document, upload it to OPS and attach it to your application, see **Add document** image above. Please ensure you reference the question your document relates to in both the file name and the body of the document itself.

5. Other Blocks

Specific detail on the budget, funding sources, milestones, risk, and outputs blocks can be found in additional dedicated guidance documents.

6. Submitting a Project

Once you have completed all the necessary blocks and you are happy with the level of detail in the application, submit the project for review by clicking the **Submit Project** button, highlighted below.

Status: Draft
Please complete each section and then submit.

This project is now ready to submit

Project ID: P10593

1
PROJECT DETAILS
COMPLETE ✓

2
QUESTIONS
COMPLETE ✓

Project History ▾

Comments
Add an explanatory comment

SUBMIT PROJECT

If you need to make edits to the project after you have submitted it, you must withdraw the project to be able to make edits, highlight below.

This screenshot shows a project submission interface with the following elements:

- Status:** Submitted
- Message:** This project is submitted and must be withdrawn before being edited or abandoned
- Project ID:** P10593
- Section 1:** PROJECT DETAILS, COMPLETE ✓
- Section 2:** QUESTIONS, COMPLETE ✓
- Project History:** A dropdown menu.
- Comments:** A text input field with the placeholder "Add an explanatory comment".
- Action:** A green "WITHDRAW" button, which is circled in red.

In some instances, the project may be returned by the reviewer. This may be due to missing information or a need for clarity. You can see their comments by exposing the **Project History** dropdown, see below. From here you can make the revisions needed to progress the application and then re-submit the project as before. The project can be submitted and resubmitted as many times as needed.

This screenshot shows a project submission interface with the following elements:

- Status:** Returned
- Message:** This project is under assessment and has been returned back for edits. Please complete each section and then submit.
- Project ID:** P10593
- Section 1:** PROJECT DETAILS, COMPLETE ✓
- Section 2:** QUESTIONS, COMPLETE ✓
- Project History:** An expanded dropdown menu showing a return message: "24/02/2021 at 16:10 Returned by Test Super Admin. Add more information to the strategic case."

If the project is successfully approved, the project status will be changed to active. In some cases, such as a two-stage application process, you may be required to provide more information. In these cases, new blocks will appear marked with a **NEW** banner. To progress the application, simply complete the blocks as before and submit the application for further review.

The screenshot shows a project dashboard for Project ID: P10593 with a status of 'Active'. It features three numbered blocks:

- Block 1: PROJECT DETAILS** - Status: APPROVED ✓
- Block 2: QUESTIONS** - Status: APPROVED ✓, marked with a 'NEW' banner and 'INCOMPLETE' at the bottom.
- Block 3: APPEARS ON ACTIVE** - Status: UNAPPROVED ⚠, marked with a 'NEW' banner and 'INCOMPLETE' at the bottom.

A 'Project History' dropdown menu is located at the bottom of the dashboard.

6.1 Project Statuses

Projects can be marked as having a number of different statuses, which represent where they are in the lifecycle of a project. For example, when a project is first created its status appears as 'Draft'. These can be found in the status column of the project page, see the screenshot below.

The screenshot shows a 'Projects' table with the following data:

| PROJECT ID | PROJECT TITLE | ORG NAME | ORG CODE | ORG TYPE | PROGRAMME | PROJECT TYPE | STATUS | MODIFIED |
|---------------------------------|-----------------|----------|----------|------------|--------------------------|----------------------------------|-----------|--------------------|
| <input type="checkbox"/> P10596 | Submission Test | NTCA | 19000 | Individual | NTCA Programme | Block Appears on Active Demo | Submitted | Mar 3, 2021 11:17 |
| <input type="checkbox"/> P10595 | Permo Project | NTCA | 19000 | Individual | Legacy - Investment Fund | Data Migration - Investment Fund | Draft | Mar 2, 2021 16:48 |
| <input type="checkbox"/> P10593 | withdraw b | NTCA | 19000 | Individual | NTCA Programme | Block Appears on Active Demo | Active | Feb 24, 2021 16:17 |
| <input type="checkbox"/> P10590 | Project X | NTCA | 19000 | Individual | NTCA Programme | NTCA Business Case v9 | Draft | Feb 24, 2021 16:08 |

The table below shows each of the possible project statuses, and a brief description of what they mean.

| Status | Definition |
|----------------------------|---|
| Draft | The project is in draft. |
| Submitted | The blocks have been completed and the project has been submitted for review. |
| Assess | The project is under assessment and / or is going through the project approval process. |
| Returned | The project has been returned for edits. |
| Active | The project has been approved for the next stage, this is either the full business case stage or the delivery stage depending on the project template used. |
| Active: Unapproved Changes | The project has been approved for the next stage; however, edits have been made to one or more of the blocks which need to be approved. |
| Active: Approval Requested | Changes have been made to the blocks (this includes a requested claim) and approval has been requested. |
| Closed: Completed | The project has been completed and is closed. |
| Closed: Abandoned | The project has been closed during delivery. |
| Closed: Rejected | The project has been closed ahead of delivery. |

7. Active Projects

Once a project is active, organisations continue to update the blocks in line with delivery. Milestones, risk, and outputs updates form part of project initiation and the ongoing claims and monitoring process. The **Project Progress** block is updated as part of the claims and monitoring process and will appear once the project is active. This works in a similar way to the new blocks that appear as part of a staged application, see above.

More information on the claims process through NE OPS can be found within the dedicated claims guidance documentation.