

Systems User Guide

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1. NEC Estates

1.1 Introduction

This guide provides an overview of NEC Estates and the related processes.

1.2 Objectives

This guide will help you to:

- Understand the role of Estates within NEC Housing.
- Recognise the links between the NEC Housing product areas.
- Gain access to NEC Housing.

1.3 Main Functions of Estates

Estates is the core product area of the NEC Housing application holding information about people and properties.

Other NEC Housing product areas, for example, Rents, Repairs and Allocations, all access the information within Estates, consequently, most of the data needed to run the system is set up and maintained within the Estates product area.

It is in Estates that details of administration units, properties, voids, tenancies, parties, and households are maintained.

The following business areas within Estates are important:

- Administration Units
- Properties
- Tenancies
- Voids
- Parties and Households

1.4 Administration Units

Administration units (or admin units) are used to group properties within NEC Housing to exercise financial controls, produce reports and limit user access.

Queries can be run on admin units to obtain information, for example, all void properties in the admin unit type of OFF (office) or accounts, in arrears by housing officer PAT (patch).

Admin unit groupings could reflect, for example, repair contract areas, estates, regions, political wards, and blocks of flats. Admin units may also be linked in a hierarchy with the property assigned to the lowest level, for example, a property may be assigned to a block, which is assigned to an estate, which is assigned to a region.

1.5 Properties

Properties are used to manage the housing stock held within NEC Housing.

Details of the address and features such as number of bedrooms, type of heating, lettings area etc. can be maintained.

1.6 Tenancies

Tenancies represent the formal linking of a person or people, known as tenants, with a property for a period. In business terms this link is the tenancy agreement.

Tenancies can be created, maintained, and terminated within Estates. However, if your organisation has the Allocations module, tenancies are normally created and, in some instances, terminated via Allocations.

1.7 Voids










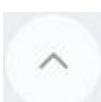


Void is a term used in housing to denote that a property is not occupied. The property may be void as it is newly acquired and has not yet been let or because the last tenancy has ended, and the next tenancy has not yet started.














Void management and reporting are found within the Estates and Allocations modules. This flexibility within void management and NEC Housing enables void properties to be closely monitored.









1.8 Parties and Households

Parties and households can be created, maintained, and terminated within Estates.





1.9 System Icons

Icon	Description
	Click the Main Row Action icon to view a list of different areas within the system. (THE BURGER)
	Click the More Chevron icon to access the business and functional areas of the application.
	Click the Row Action icon to access a list of values from which you can select an action to perform.
	Click the Create icon to open the form or wizard used to create a record.
	Click the Open icon to view the contents of a region or form.
	Click the Close icon to hide the contents of a region or form.
	Click the Next Page icon to view the next set of records in a summary page region.
	Click the Previous Page icon to view the previous set of records in a summary page region.
	Click the Expand/Collapse icon to display additional information relating to the corresponding record or to hide this additional information.
	Click the Start of Page icon to allow the system to automatically scroll up to the start of the summary or details page you are currently on.
	Click the Select this record icon to select the record in the corresponding row to display associated child regions.
	Click the Advanced Search icon to access an advanced search from a summary page.

	Click the Last Query icon to resubmit the last query performed.
	Click the Help icon to open the online help topic relating to the page, region or form you are using. The help button appears in the top banner or footer.
	Click the Help About icon to view further information about the region or form you are currently in.
	Click the Cancel icon to close the region, form, or screen you are in without saving your changes.
	Click the Mobile icon to indicate that you are using a mobile device. The screen will adapt so that it is fully optimised when in this mode.
	Click the Desktop icon to indicate that you are using a desktop. The screen will adapt so that it is fully optimised when in this mode.
	Click the Cards View icon to change the way in which the search results are displayed. This icon is only available in the MyPortal 360View page.
	Click the Report View icon to change the way in which the search results are displayed. This icon is only available in the MyPortal 360View page.
	Click the More icon at the top of a details page to display more links that you can use to navigate to different regions.
	Click the Calendar icon to select the date you want from the pop-up calendar that appears. Alternatively enter the date using your keyboard.
	Click the Open Search Page icon to open a secondary form where you can enter your search criteria.
	Click the Select List icon to select the item you want from the pop-up list that appears.
	Click the System Menu icon to a view drop down list from which you can perform the following actions: Preferences - The Display Preferences page will open, and you can set your user preferences for the system. Help - The online help homepage will open where you can search for further information. Password - The Change Password form will open, and you can change your password for the system. Log Off - You will be logged off the system.
	Click the Excel icon to export the records held within the region to your computer as an Excel document.

	Click the Add Row icon to add a new row to a form in a wizard.
	Click the Remove this row icon to remove a row from a form in a wizard.
*	This icon denotes a mandatory field where information must be entered before a task can be completed.
	Click the Reset icon to reset your selections back to the default settings.
	Click the Move icon to move your selection to another area.
	Click the Move All icon to move all your selections to another area.
	Click the Remove icon to remove your selection.
	Click the Remove All icon to remove all your selections.
	Click the Top icon to move your selection to the top of the list.

There are five types of errors:

Type of Error	What this means
E – Error 	Action needed to be taken to continue process
I – Information 	For information
Q – Question	Likely to be a mandatory field
V – Validation 	For information
W – Warning 	Action needed to be taken to continue process

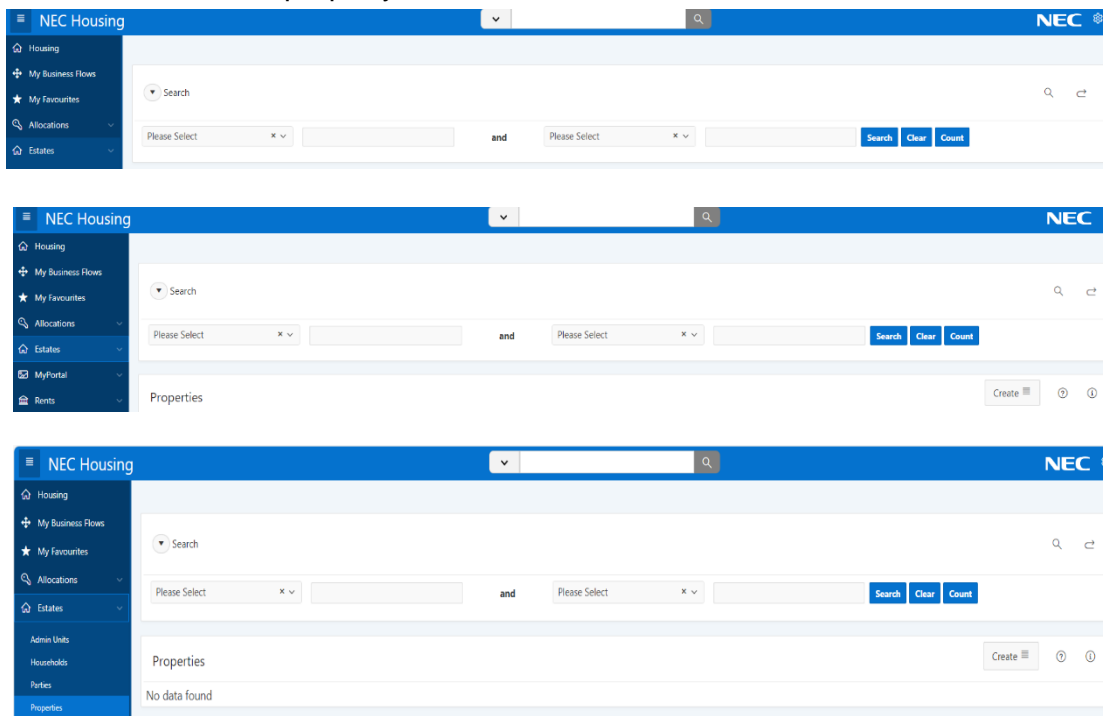
2. Estate Processes

2.1 Properties

Properties are used to manage the housing stock held within NEC Housing.

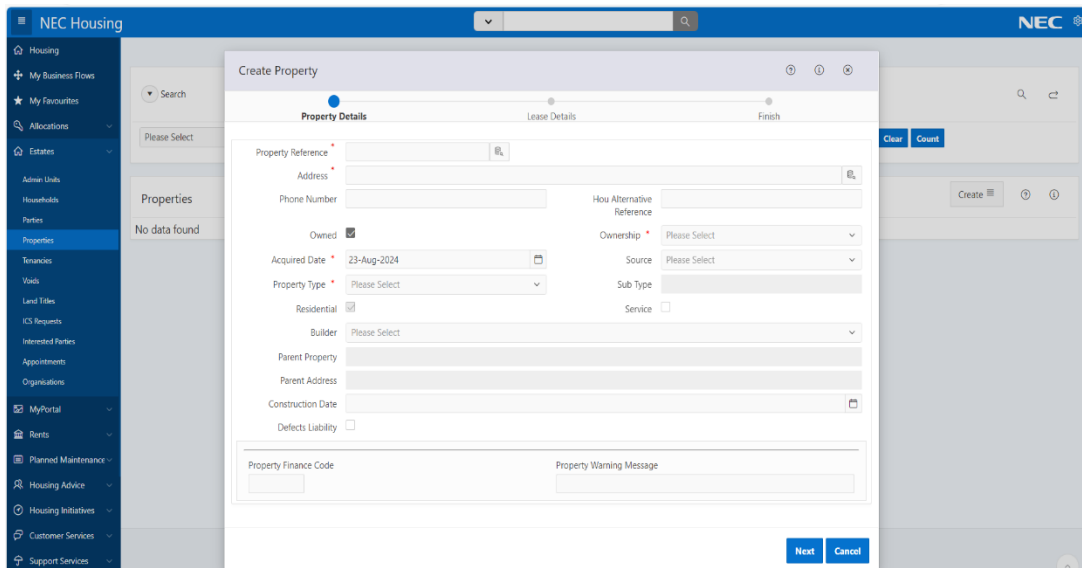
Details of the address and features such as number of bedrooms, types of heating and lettings area can be maintained.

Properties include houses, flats and garages are used within the system to denote an occupied, owned, rented or vacant building that is either lived in and or forms part of an agreement between a person and the organisation, an example of which could be a social tenant or council tax property.



2.1.1 Creating a property

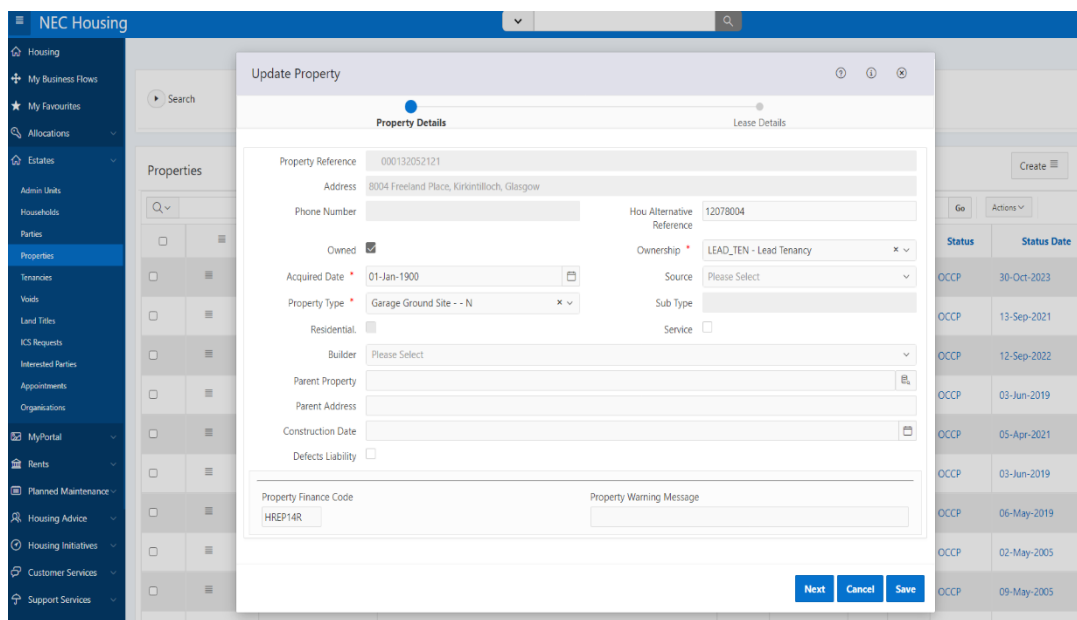
- Click Housing Icon
- Click on the Housing icon to open the Housing menu.
- Navigate to Estates
- Click on Estates in the Housing menu.
- Access Properties
- Click on Properties to open the Properties page.
- Create New Property



- Select 'Create Property' from the Create list at the top of the region.
- Enter Property Details
- Fill in the following details in the wizard:
- Property Code
- Property Name
- Address
- Number of Bedrooms
- Type of Heating
- Save the Property
- Click Save to create the property.

2.1.2 Updating a property

- Click Housing.
The Housing menu expands.
- Click Estates.
The Estates menu expands.
- Click Properties.
The Properties summary page appears.
- Enter your search criteria in the Search area.
If the Quick Search options do not meet your needs, click the Advanced Search icon at the top of the Search area, and enter more specific criteria.
Tip: Click the Help icon at the top of the form for further information.
- Click Search.
The records that meet your search criteria appear in the Properties region.
- Select Update Property from the Row Action list corresponding to the record you want to update.

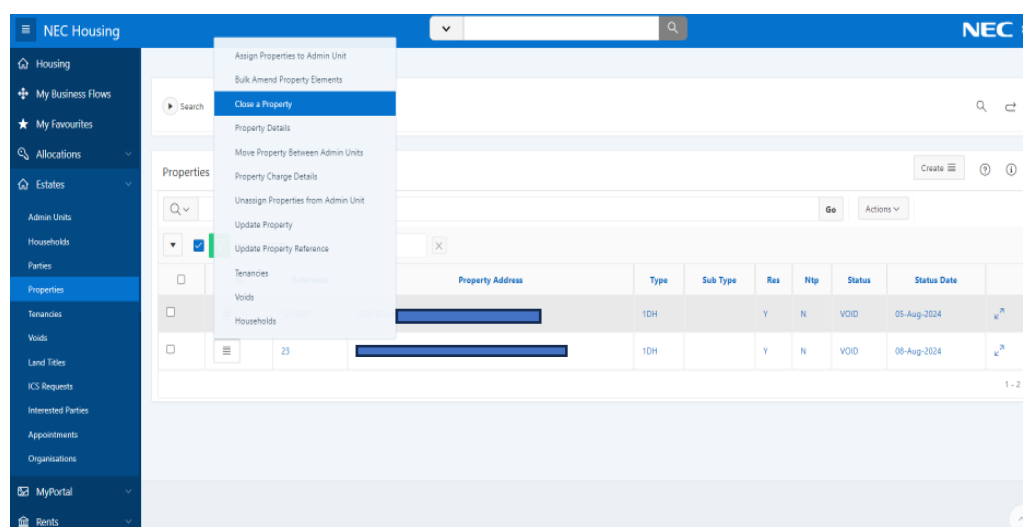


The Update Property wizard appears.

- Enter the relevant data in the wizard.
 Tip: Click the Help icon at the top of the wizard for further information.
- Click Save.
 The wizard closes and you are returned to the Properties region.
 The changes you made to the property have been applied.

2.1.3 Disposing a property

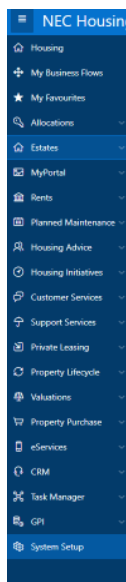
- Click Housing Icon Housing
- Click Estates.
- Click Properties.
- Search for the property by using the advance search and select void on the property status
- row action the property on the front page and select close property



- fill in the wizard selecting date and close status
- click next
- click save

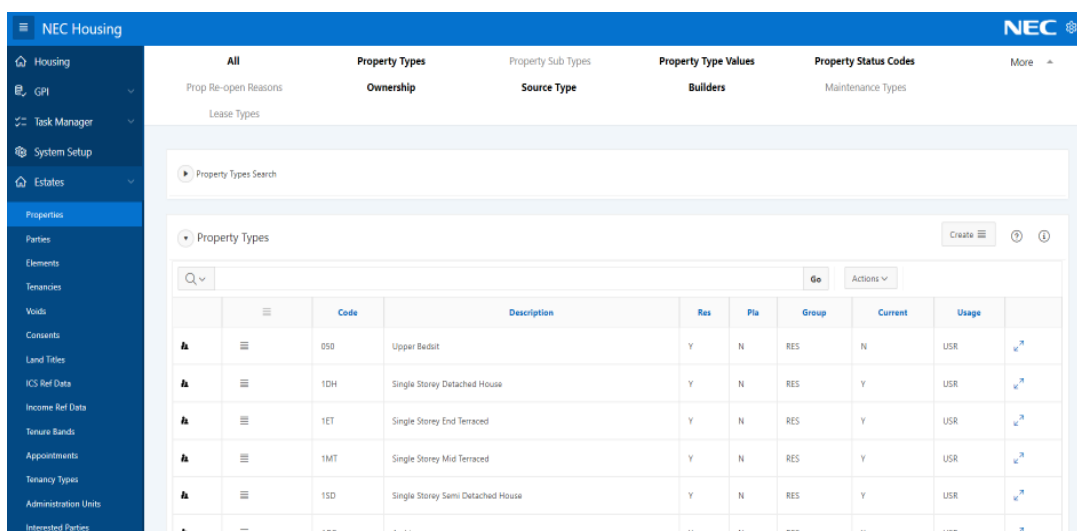
2.1.4 Creating a Property Type

- Click System Setup.



The System Setup area appears with the default product area displayed.

- Click Estates.
 - The Estates menu expands.
 - Click Properties.
 - The Properties setup page appears.
 - Click the Property Types link at the top of the setup page.
- Tip: If the link isn't visible at the top of the screen, click More to expand the menu.



The page refreshes to display the selected region.

- Select Create Property Type from the Create list at the top of the region.
- The Create Property Type form appears.
- Enter the relevant data in the form.

Tip: Click the Help icon at the top of the form for further information.

- Click Save.
 The new property type appears in the Property Types region.
 The property type is now available to use elsewhere in the system.

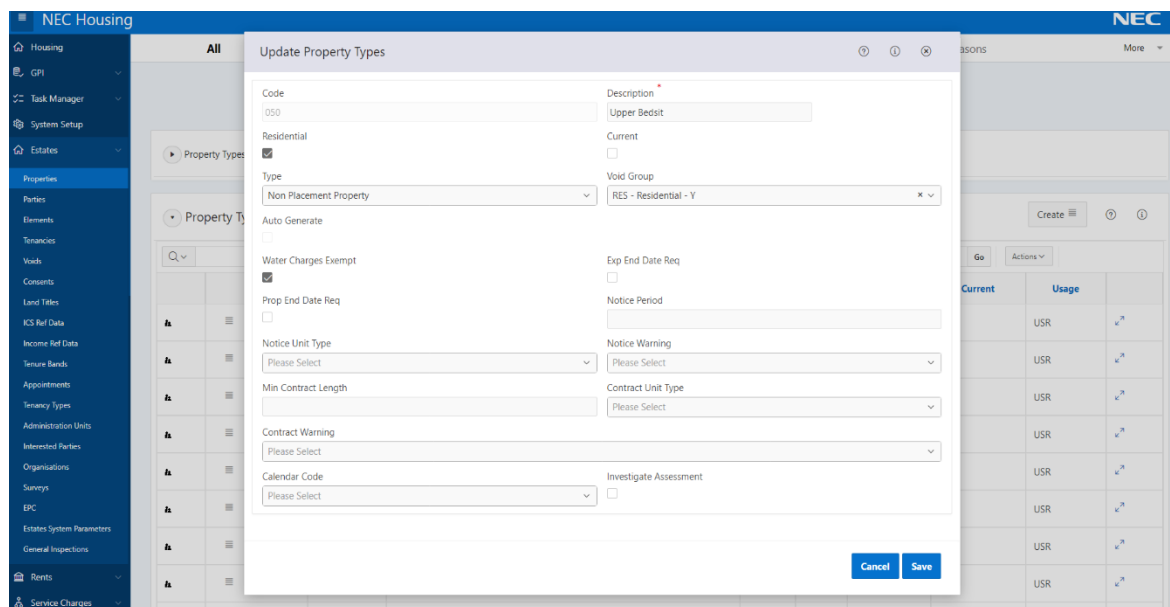
2.1.5 Updating a Property Type

- Click System Setup.
 The System Setup area appears with the default product area displayed.
- Click Estates.
 The Estates menu expands.
- Click Properties.

	Code	Description	Res	Pla	Group	Current	Usage
▲	050	Upper Bedst	Y	N	RES	N	USR
▲	1DH	Single Storey Detached House	Y	N	RES	Y	USR

The Properties setup page appears.

- Click the Property Types link at the top of the setup page.
 Tip: If the link isn't visible at the top of the screen, click More to expand the menu.
 The page refreshes to display the selected region.
- Select Update Property Type from the Row Action list corresponding to the appropriate record.
 The Update Property Types form appears.



- Enter the relevant data in the form.
 Tip: Click the Help icon at the top of the form for further information.
- Click Save.
 The form closes and you are returned to the Property Types region.
 The changes you made to the property type have been applied.

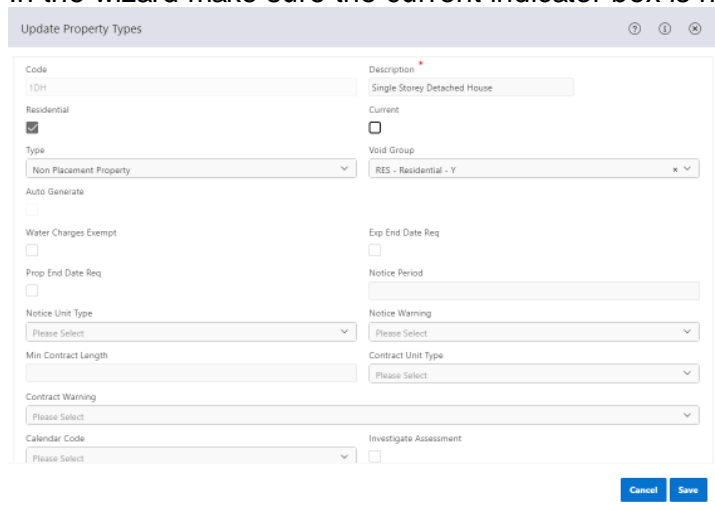
2.1.6 Removing a Property Type

- Click System Setup.
 The System Setup area appears with the default product area displayed.
- Click Estates.
- Click Properties.
 The Properties setup page appears.
- Click the Property Types link at the top of the setup page.

Tip: If the link isn't visible at the top of the screen, click More to expand the menu.

The page refreshes to display the selected region.

- Row action the property type you want to remove and select update property type
- In the wizard make sure the current indicator box is not ticked



- Click save

2.2 Admin Units

Administration units are used to group properties within NEC Housing to exercise financial controls, produce reports and limit user access. Queries can also be run on admin units, for example, all void properties in the admin unit type of OFF (office) or accounts, in arrears by housing officer PAT (patch).

The administration unit structure forms a hierarchy, and different hierarchies can be established to reflect various geographical or management property grouping within an organisation.

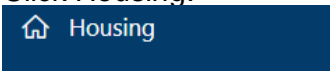
Groupings could reflect, for example, repair contract areas, estates, regions, political wards and blocks of flats. Administration units may be linked in a hierarchy with the property assigned to the lowest level, for example, a property may be assigned to a block, which is assigned to an estate, which is assigned to a region.

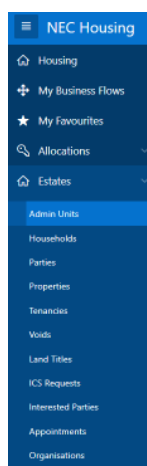
If codes are structured and logical, reporting will be made easier. For example, the codes for all area offices could begin with the same characters, such as AREA01, AREA02, etc. If numeric codes are required, say for schemes the code can be prefixed with the type as in SCH123456.

Codes should not contain spaces. Use of the underscore is allowed but may cause problems when querying, as it is a wildcard character.

Admin units are created and maintained from the **Admin Units** summary page within the Estates module of NEC Housing. From here you will be able to carry out the daily tasks associated with maintaining admin units.

2.2.1 Creating an Admin Unit

- Click Housing.

- The Housing menu expands.
- Click Estates.
 The Estates menu expands.



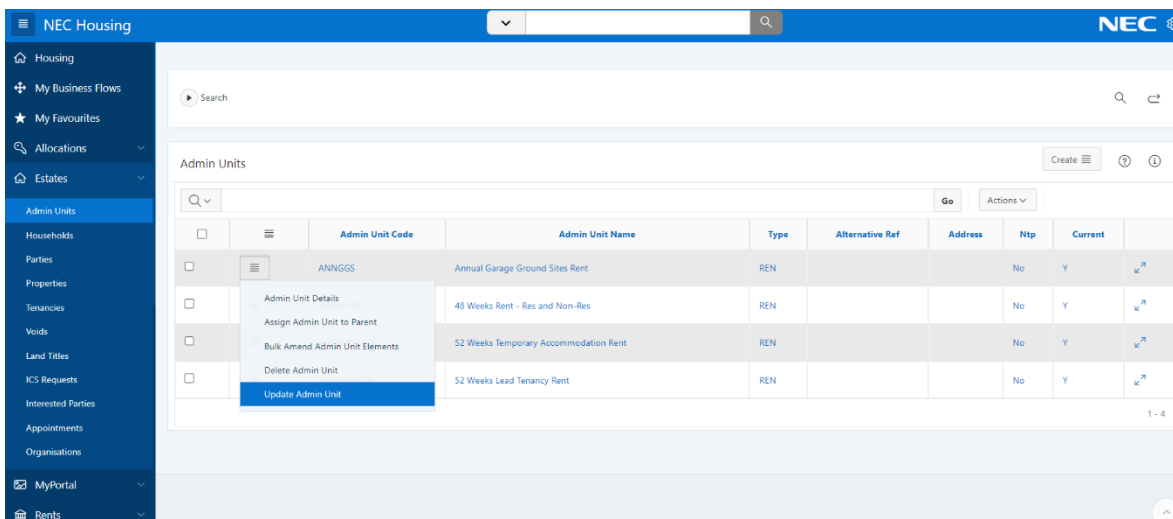
- Click Admin Unit.
The Admin Unit page appears.
- Select Create Admin Unit from the Create list at the top of the region.
The Create Admin Unit wizard appears.
- Enter the relevant data in the wizard.

-
- Tip: Click the Help icon at the top of the wizard for further information.
- Click Save.
The new admin unit appears in the Admin Units region.
The admin unit has been created.

2.2.2 Updating an Admin Unit

- Click Housing.
The Housing menu expands.
- Click Estates.
The Estates menu expands.
- Click Admin Units.
The Admin Units summary page appears.
- Enter your search criteria in the Search area.
If the Quick Search options do not meet your needs, click the Advanced Search icon at the top of the Search area, and enter more specific criteria.
Tip: Click the Help icon at the top of the form for further information.
- Click Search.
The records that meet your search criteria appear in the Admin Units region.

- Select Update Admin Unit from the Row Action list corresponding to the record you want to update.



The Update Admin Unit form appears.

- Enter the relevant data in the form.

The 'Update Admin Unit' form is displayed. It contains the following fields: Admin Unit Code (ANNGGS), Admin Unit Name (Annual Garage Ground Sites Rent), Type (Revenue Accounting), Alternative Reference (empty), Tenancy Week Start (Please Select), Current (checked), and Comments (empty). There are 'Cancel' and 'Save' buttons at the bottom right.

Tip: Click the Help icon at the top of the form for further information.

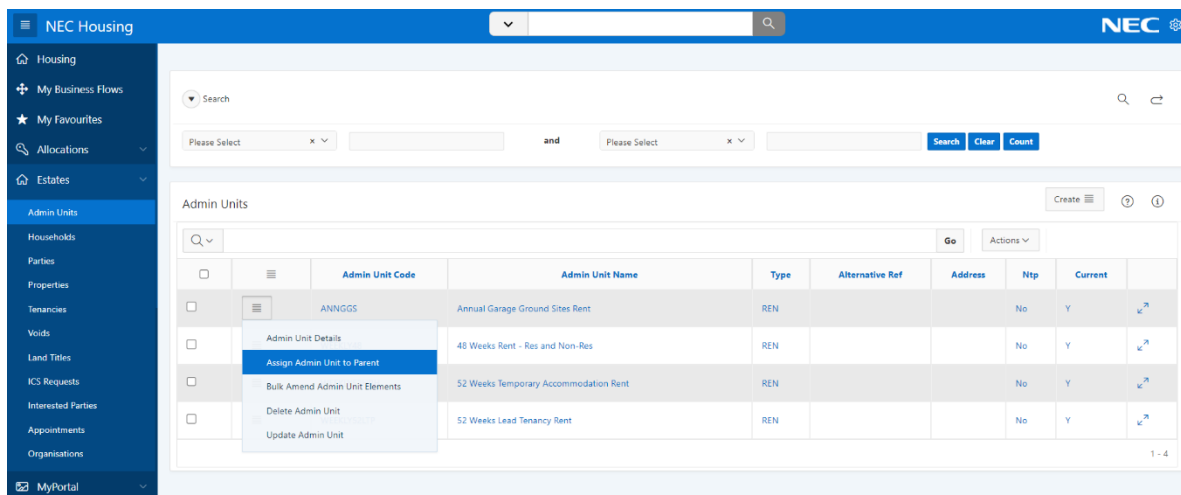
- Click Save.
 The form closes and you are returned to the Admin Units region.
 The changes you made to the admin unit have been applied.

2.2.3 Assigning an Admin Unit

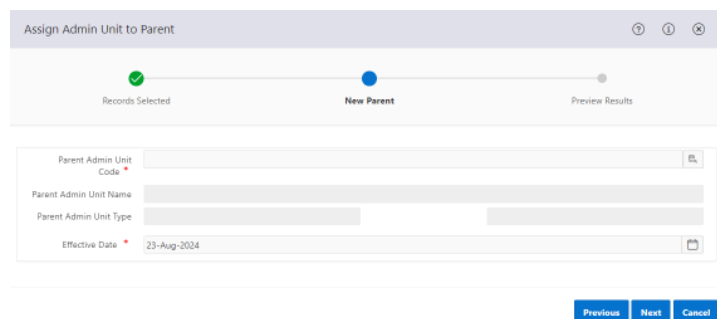
- Click Housing.
 The Housing menu expands.
- Click Estates.
 The Estates menu expands.
- Click Admin Unit.
 The Admin Unit page appears.
- Enter your search criteria in the Search area.
 If the Quick Search options do not meet your needs, click the Advanced Search icon at the top of the Search area, and enter more specific criteria.
 Tip: Click the Help icon at the top of the form for further information.
- Click Search.
 The records that meet your search criteria appear in the Admin Units region.
 Do one of the following:

To assign admin units to a parent in bulk, check the boxes corresponding to the records you require, then select Assign Admin Unit to Parent from the Bulk Actions list in the table heading.

To assign a single admin unit to a parent, select Assign Admin Unit to Parent from the corresponding Row Action list.



The Assign Admin Unit to Parent wizard appears.

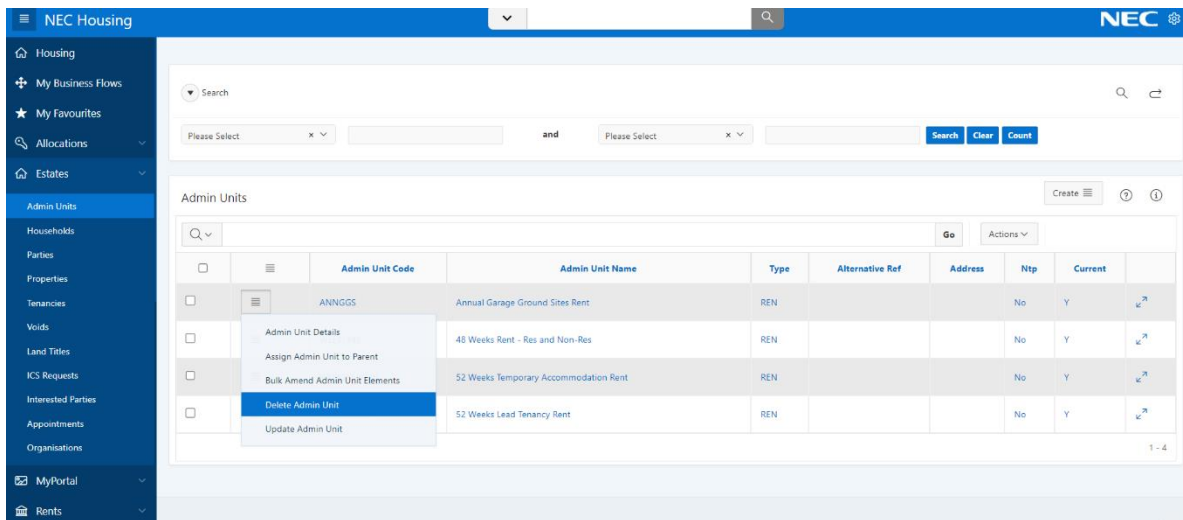


- Enter the relevant data in the wizard.
 Tip: Click the Help icon at the top of the wizard for further information.
- Click Save.
 The wizard closes and you are returned to the Admin Units region.
 The admin unit has been assigned to a parent admin unit.

2.2.4 Removing an Admin Unit

- Click Housing.
 The Housing menu expands.
- Click Estates.
 The Estates menu expands.
- Click Admin Unit.
 The Admin Unit page appears.
- Enter your search criteria in the Search area.
 If the Quick Search options do not meet your needs, click the Advanced Search icon at the top of the Search area, and enter more specific criteria.
 Tip:
 Click the Help icon at the top of the form for further information.

- Click Search.
The records that meet your search criteria appear in the Admin Units region.
- Select Delete Admin Unit from the Row Action list in the appropriate row.
A message box appears.



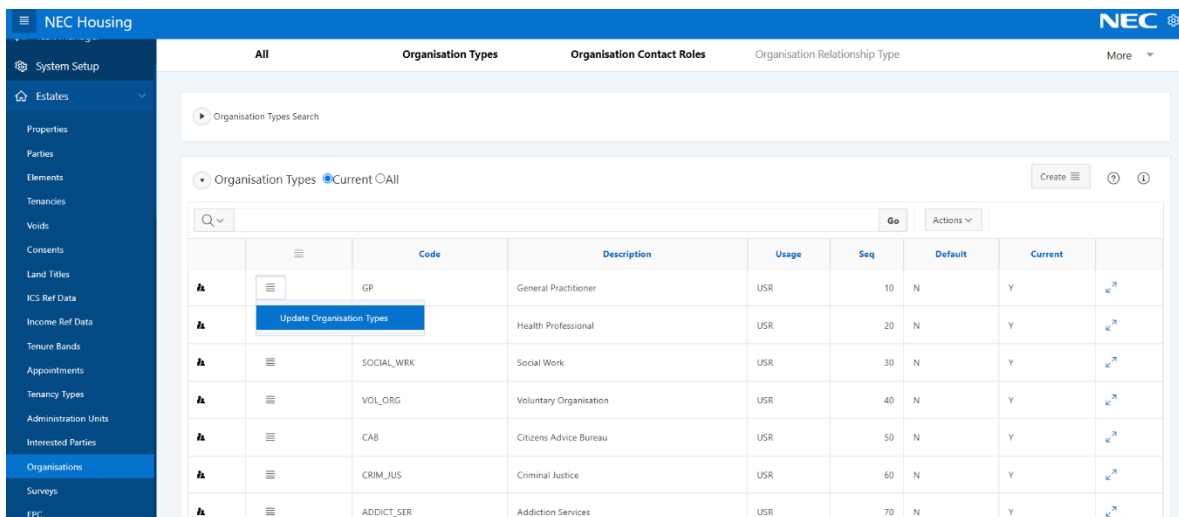
- Click OK to confirm the deletion.

2.3 Organisations

Organisations denote structures through which individuals cooperate systematically to conduct business within the Estates product area.

2.3.1 Creating an Organisation

- Click System Setup.
The System Setup area appears with the default product area displayed.
- Click Estates.
The Estates menu expands.
- Click Organisations.
The Organisations setup page appears.



- Click Organisation Types link at the top of the setup page.
 Tip: If the link isn't visible at the top of the screen, click More to expand the menu.
 The page refreshes to display the selected region.
- Select Create Organisation Types from the Create list at the top of the region.
 The Create Organisation Types form appears.
- Enter the relevant data in the form.

- Tip: Click the Help icon at the top of the form for further information.
- Click Save.
 The new organisation type appears in the Organisation Types region.
 The organisation type is now available to use elsewhere in the system.

2.3.2 Updating an Organisation

- Click System Setup.
 The System Setup area appears with the default product area displayed.
- Click Estates.
 The Estates menu expands.
- Click Organisations.
 The Organisations setup page appears.
- Click Organisation Types link at the top of the setup page.
 Tip: If the link isn't visible at the top of the screen, click More to expand the menu.
 The page refreshes to display the selected region.
- Select Update Organisation Types from the Row Action list corresponding to the appropriate record.

The Update Organisation Types form appears.

- Enter the relevant data in the form.
Tip: Click the Help icon at the top of the form for further information.
- Click Save.
The form closes and you are returned to the Organisation Types region.
The changes you made to the organisation type have been applied.

2.3.3 Removing an Organisation

- Click Housing.
The Housing menu expands.
- Click Estates.
The Estates menu expands.
- Click Organisations.
The Organisations page appears.
- Enter your search criteria in the Search area.
If the Quick Search options do not meet your needs, click the Advanced Search icon at the top of the Search area, and enter more specific criteria.
Tip: Click the Help icon at the top of the form for further information.
- Click Search.
The records that meet your search criteria appear in the Organisations region.
- Select Delete Organisation from the Row Action list corresponding to the record you want to delete.

Reference	Organisation Name	Short Name	Type	Sort	Ntp	Child	Current
233	BLYTHSWOOD PROPERTY MANAGEMENT	BWOOD_PM	FACTOR	-	N	N	Y
	CAS CLEANING	CAS_CLEAN	FACTOR	-	N	N	Y
	CORONET SERVICES	CORONET	FACTOR	-	N	N	Y
236	EDC GROUNDS	EDC_GRND	FACTOR	-	N	N	Y
237	HANOVER SCOTLAND	HANOVER	FACTOR	-	N	N	Y
238	CRIMINAL JUSTICE	CRIM_JUST	FACTOR	-	N	N	Y
239	EDC CONCIERGE	EDC_CONCRG	FACTOR	-	N	N	Y

A message box appears.

- Click OK to confirm the deletion.
The organisation has been deleted.

2.4 Structured Addresses

2.4.1 Creating Structured Addresses

- Click System Setup.
- Click General.
- Click Addresses.

The screenshot shows the NEC Housing system interface. On the left is a navigation menu with 'Addresses' selected. The main area displays the 'Address Usage Types' table. The table has columns for Object, Role, Format, Usg, End, Cur, Con, and NFA. The data rows are as follows:

	Object	Role	Format	Usg	End	Cur	Con	NFA
	AUN	PHYSICAL	Free	USR	Y	Y	Y	N
	TCY	FORWARD	Free	SYS	Y	Y	N	N
	PRO	PHYSICAL	Structured	USR	Y	Y	Y	N
	BDE	PHYSICAL	Structured	SYS	N	Y	N	N
	PDF	PHYSICAL	Free	SYS	N	Y	N	N
	PAR	CORRESPOND	Free	SYS	Y	Y	N	N

- The Addresses page appears.
- Click more and select Address Usage Types
Tip: Click the Help icon at the top of the form for further information.
- Click Create
- Fill in the wizard selecting address object, address role and format type

The screenshot shows the 'Create Address Usage Type' form. It contains the following fields and options:

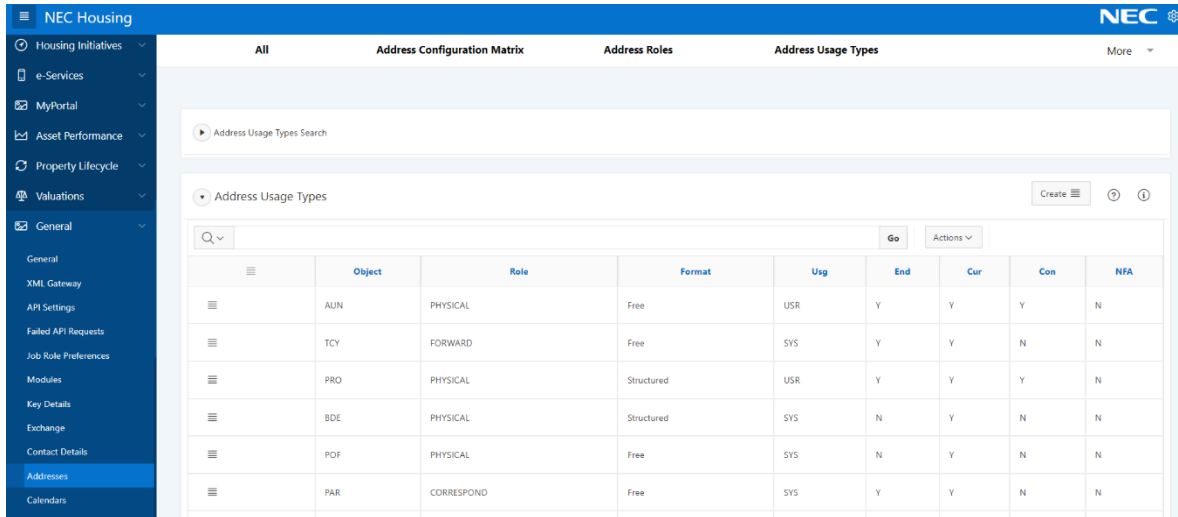
- Address Object: Please Select (dropdown)
- Address Role: Please Select (dropdown)
- Format Type: Please Select (dropdown)
- Allow End Date:
- Allow Contact Name:
- NFA:

Buttons at the bottom: Cancel, Save, Apply.

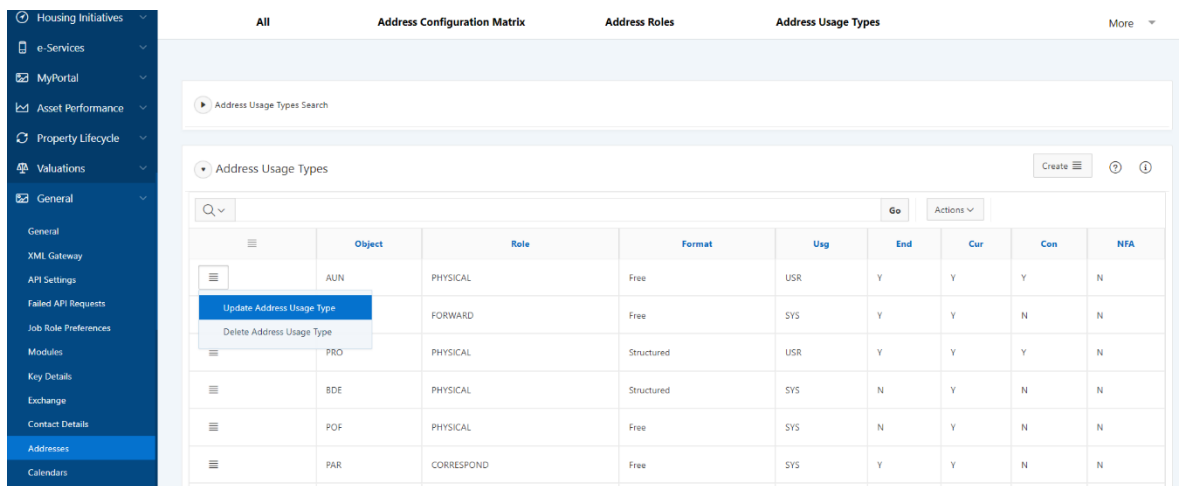
- Click save

2.4.2 Updating Structured Addresses

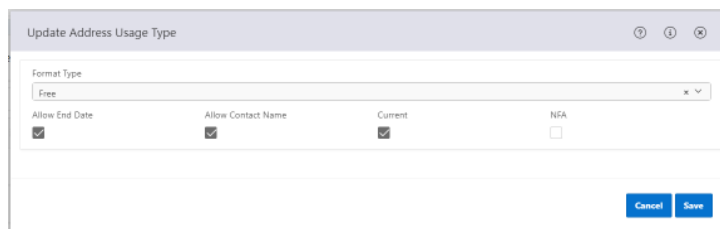
- click on system setup
- click on general
- click on addresses



- click address usage type
- row action the type you want to update



- select update address usage type
- fill in the wizard selecting format



- click save

2.4.3 Removing Structured Addresses

- click on system setup
- click on general
- click on addresses
- click address usage type
- row action the type you want to remove

	Object	Role	Format	Usg	End	Cur	Con	NFA
	AUN	PHYSICAL	Free	USR	Y	Y	Y	N
		FORWARD	Free	SYS	Y	Y	N	N
	PRO	PHYSICAL	Structured	USR	Y	Y	Y	N
	BDE	PHYSICAL	Structured	SYS	N	Y	N	N
	POF	PHYSICAL	Free	SYS	N	Y	N	N
	PAR	CORRESPOND	Free	SYS	Y	Y	N	N

- select delete address usage type

Confirm you want to perform the following action...

Delete Address Usage Type

....for record:- AUN

Cancel **OK**

- click ok

2.5 Elements

Elements can be assigned to both properties and admin units. When assigned to properties they could be used to record physical characteristics of the property, whilst admin unit elements could be used to hold details of communal facilities or physical characteristics of blocks of flats or estates, for example.

Element types available include:

- **CL** (Client)
- **CP** (Contractor Performance)
- **PR** (Property)
- **SC** (Service Charge)
- **SE** (Survey Element)

Where an element is defined as type **PR**, it is also necessary to define whether the element is to be used in the Planned Maintenance product area. When creating an element this will default to 'not to be used' in Planned Maintenance and should be left at this value until the Planned Maintenance product area is configured.

The attribute type must also be specified, i.e., whether the attribute is numeric, coded, multi-value, or date. Where the attribute type is 'coded', the appropriate coded values that can be used as an attribute of the element must be defined.

Multi value elements allow more than one current instance of an element to exist against a property, provided each instance of the element has a different attribute recorded, for example, a multi-value element of ADAP could allow attributes of RAMP, STAIRLIFT, GRABRAILS to be recorded against a property. The acceptable coded values for the attributes must be defined in the same way as for coded attributes. Because multi-value elements are not unique, they cannot be used in allocation matching rules or for rent calculation.

Elements can be assigned to one or more element groups if required.

Job roles can be assigned to individual elements, with either 'read only' access (allowing the element to be viewed only by users associated with the job roles assigned) or 'write' access (allowing the element to be created or updated only by users associated with the job roles assigned).

If no job roles are assigned to an element, the element can be created and maintained by any user who has access to the **Create Element** form and can be viewed by any user who has access to the relevant pages.

2.5.1 Creating an Element

- Click System Setup.
The System Setup area appears with the default product area displayed.
- Click Estates.
The Estates menu expands.
- Click Elements.

	Code	Description	Element Type	Attribute Type	HPM Usage	Further Attribute	Usg	Parent	Sec	Cur	Att	Fur
ik	BEDS	No of beds	PR	N	N	-	USR	-	N	Y	N	N
ik	BEDSIZEDBL	No of Double bedrooms	PR	N	N	-	USR	-	N	Y	N	N
ik	BEDSIZESIN	No of Single bedrooms	PR	N	N	-	USR	-	N	Y	N	N
ik	DWELLING	Dwelling type	PR	C	N	-	USR	-	N	Y	Y	N
ik	NEEDS_TYPE	Needs Type	PR	C	N	-	USR	-	N	Y	Y	N
ik	PRINTRP_CHARACTERISTIC	Principal Characteristic	PR	M	N	-	USR	-	N	Y	Y	N

The Elements setup page appears.

- Click on create and select create element
- Fill in the wizard creating a code and description
- Click save

2.5.2 Updating an Element

- Click System Setup.
The System Setup area appears with the default product area displayed.
- Click Estates.
The Estates menu expands.
- Click Elements.
The Elements setup page appears

	Code	Description	Element Type	Attribute Type	HPM Usage	Further Attribute	Usq	Parent	Sec	Cur	Att	Fur	
	BEDS	No of beds	PR	N	N	-	USR	-	N	Y	N	N	⋮
		No of Double bedrooms	PR	N	N	-	USR	-	N	Y	N	N	⋮
	BEDSIZESIN	No of Single bedrooms	PR	N	N	-	USR	-	N	Y	N	N	⋮
	DWELLING	Dwelling type	PR	C	N	-	USR	-	N	Y	Y	N	⋮
	NEEDS_TYPE	Needs Type	PR	C	N	-	USR	-	N	Y	Y	N	⋮

- Row action the element you want to update and select update element.
- Fill in the wizard with the updates.

- Click save.

2.5.3 Removing an Element

- Click System Setup.
The System Setup area appears with the default product area displayed.
- Click Estates.
The Estates menu expands.
- Click Elements.
The Elements setup page appears

	Code	Description	Element Type	Attribute Type	HPM Usage	Further Attribute	Usg	Parent	Sec	Cur	Att	Fur
	BEDS	No of beds	PR	N	N	-	USR	-	N	Y	N	N
		No of Double bedrooms	PR	N	N	-	USR	-	N	Y	N	N
	BEDSIZESIN	No of Single bedrooms	PR	N	N	-	USR	-	N	Y	N	N
	DWELLING	Dwelling type	PR	C	N	-	USR	-	N	Y	Y	N
	NEEDS_TYPE	Needs Type	PR	C	N	-	USR	-	N	Y	Y	N

- Row action the element you want to update and select update element.
- In wizard make sure the current box is unticked

- Click save.

2.6 Tenancies

Tenancies represent the formal linking of a person or people, known as tenants, and a property for a period. In business terms this link is the tenancy agreement.

2.6.1 Creating a Tenancy via Accepting an Offer

- Select 'Allocations' and select 'Offers', search for the property using the search or advanced search options
- 'Row Action' the property which the offer is on, and select 'Confirm Acceptance of an Offer'

- Complete the 'Confirm Acceptance of an Offer' wizard by first completing the 'General' page by entering the relevant data, ensuring to provide an option in the terminate existing tenancy if they are already a council tenant and if the tenancy will be a permanent or temporary tenancy. Then click 'Next'.

Confirm Acceptance Of An Offer

Progress: **General** | People | Tenancy Details | People Addresses

Current Tenancy: Permanent
 Terminate Existing Tenancy: Please Select
 Existing Tenancy: Please Select

Permanent Tenancy: Permanent x v

Search results:
 Searching...
 Give Notice (highlighted)
 Terminate
 Warning

Next Cancel

- Complete the 'People' page by checking all the tenant and household members are there. If someone needs added select the 'Add Row' and use the 'Open Search' to add or create them (Follow Manual for Creating a Person).
- Check that all the details of every tenant and household member are correct by clicking the 'Update' button.

Confirm Acceptance Of An Offer

Progress: General | **People** | Tenancy Details | People Addresses

Ten	Main	Person Name	Date of Birth	Sex	Rel	H/H			
<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	<input type="text"/>	10/02/1972	Male x v	MAIN - applicant x v	N	-	Update	-

1 - 1

Add Row Previous Next Cancel

- This prompts the 'Update Person' wizard where there could be some mandatory fields needing information. Add in all the relevant information.

Update Person ? i x

Surname	
<input type="text" value=""/>	
Forename	
<input type="text" value=""/>	
Initials	
<input type="text" value="M"/>	
Title	
<input type="text" value="MR"/>	
Surname Prefix	Gender *
<input type="text" value=""/>	<input style="float: right; text-align: right; font-size: small;" type="text" value="M - Male"/> x v
Date of Birth *	NI Number *
<input type="text" value=""/> <input type="button" value="📅"/>	<input type="text" value=""/>
Geographic Origin	
<input style="float: right; text-align: right; font-size: small;" type="text" value="Please Select"/> x v	
Ethnic Origin *	
<input style="float: right; text-align: right; font-size: small;" type="text" value="10 - Asian Bangladeshi"/> x v	
Alternative Reference	Marital Status
<input type="text" value=""/>	<input style="float: right; text-align: right; font-size: small;" type="text" value="MARRIED - Legally Married"/> x v
Language	Economic Status
<input style="float: right; text-align: right; font-size: small;" type="text" value="Please Select"/> x v	<input style="float: right; text-align: right; font-size: small;" type="text" value=""/> v
End Date	End Reason
<input type="text" value=""/> <input type="button" value="📅"/>	<input type="text" value="Please Select"/>
Disabled	OAP
<input type="checkbox"/>	<input type="checkbox"/>
Employer	
<input type="text" value=""/>	

- Click 'Save'
- Once this 'People' page has been completed click 'Next'
- Complete the 'Tenancy Details' page by entering all the relevant information.

The screenshot shows the 'Confirm Acceptance Of An Offer' form with the 'Tenancy Details' step highlighted. The progress bar shows 'General' and 'People' as completed (green checkmarks) and 'Tenancy Details' as the current step (blue circle). 'People Addresses' is the next step (grey circle).

Form fields include:

- Tenure Type: SST - Scottish Secure Tenancy
- Start Date: 08/02/2024
- Tenancy Source: Please Select
- Corresp Name: [Redacted]
- Alternative Ref: [Empty]
- Proxy Type: Please Select
- Supervisor: [Empty]
- Assigned Tenure: [Empty]
- Tenancy Type: SST - Scottish Secure Tenancy
- Review Date: [Empty]
- Tenancy Status: Please Select
- Contact Number: [Empty]
- Tenancy Services: Please Select
- Proxy Name: [Empty]
- Survey Code: Please Select
- Tenancy Origin: [Empty]
- Letting Date: [Empty]
- Tenancy Comments: [Empty]

Buttons at the bottom: Previous, Next, Cancel.

- One the 'Tenancy Details' page has been completed click 'Next'
- Complete the 'People Addresses' page by updating all the household addresses to the one they will now be residing.

Note: Use this subpage to enter or confirm contact address details. Provided the tenancy is being created for a residential property its address can be copied to all people on the application using the 'Copy to All' button. If required one or more people can be excluded and an alternative address assigned using the 'Open Search' in the 'Contact Address' column.

The screenshot shows the 'Confirm Acceptance Of An Offer' form with the 'People Addresses' step highlighted. The progress bar shows 'General', 'People', and 'Tenancy Details' as completed (green checkmarks) and 'People Addresses' as the current step (blue circle).

Form fields include:

- Contact Address: 74 Burns Court, Kirkintilloch, Glasgow, G66 2NR
- Copy To All button

Name	Contact Address	Address Start	Exclude
[Redacted]	[Redacted] Kirkintilloch, Glasgow, G66 2NR	29-MAY-2023	N x v
[Redacted]	[Redacted] Kirkintilloch, Glasgow, G66 2NR	29-MAY-2023	N x v

Buttons at the bottom: Previous, Cancel, Save.

- Click 'Save'

- This now closes this wizard and automatically opens the follow up 'Creating a Rent Account' wizard

Create Revenue Account

Account Details | Debit Breakdowns

Type: Rent Account

Tenancy Start Date: 08/02/2024 | Tenancy Name: [Redacted]

Reporting Property: 132032000 - 24 Burns Court, Kirkintilloch, Glasgow, G66 2... | [Redacted]

Account Number: 15140 | Check Digit: 6 | Payment Reference: 6900151400

Financial Admin Unit: WEEKLY48 - 48 Weeks Rent - Res and Non-Res

Account Start Date: 08/02/2024 | Account End Date: [] | Account Due Date: []

Alternative Reference: [] | Pending HB:

Text: []

System Messages

TCY-00074 New Tenancy created with Tenancy No : 30461

Property Reference	Property Address	Property Type	Residential	Start Date	Allocate
132032000	24 Burns Court, Kirkintilloch, Glasgow, G66 2ND	Tenement Middle Floor	Y	08/02/2024	<input checked="" type="checkbox"/>

Next | Cancel

Note: When creating a tenancy if the account has another current tenancy, i.e. a decant tenancy, lock up or garage ground site, please follow the 'Linking Current Tenancies' guide. Also ensure to follow the 'Linking Former Accounts to Tenancies' to ensure that all former accounts are linked to the new tenancy.

2.6.1 Creating a Tenancy Without Accepting of an Offer

- In 'Tenancies' click 'Create' and then 'Create a Tenancy'

Create [Menu Icon]

- Create Tenancy for Organisation
- Create A Tenancy

- This opens the 'Create Tenancy' wizard the same as 'Creating a Tenancy via Acceptance of an Offer' however it adds the 'Properties' page.

- Using the 'Open Search' search for the property to attach the tenancy to

- Click 'Select' on the property you want to attach a tenancy to

Property Search

	Reference	Property Address	Type	Sub Type		Res	Ntp	Status	Status Date	
Select	000132051649	[REDACTED] Bishopbriggs, Glasgow	GGS	-		COUN	N	N	VOID	01-Jan-1900
Select	000132051751	[REDACTED] Lennoxton, Glasgow	GGS	-		COUN	N	N	VOID	01-Jan-1900
Select	000132051754	[REDACTED] Lennoxton, Glasgow	GGS	-		COUN	N	N	VOID	01-Jan-1900
Select	000132051760	[REDACTED] Lennoxton, Glasgow	GGS	-		COUN	N	N	VOID	01-Jan-1900

- Once you have selected your property click 'Next' on the Properties page.
- This then opens the 'People' page where you need to search for the person who is to get the tenancy and all their household members using the 'Open Search'. If they do not appear in the search, you can then create the people. To do this follow the guide for 'How to Create a Person'.
- Once you have added the full household click 'Next'
- This then follows the same steps as the 'Creating a Tenancy via Acceptance of an Offer'. Follow the remainder of the steps from that guide.

Note: When creating a tenancy if the account has another current tenancy, i.e. a decant tenancy, lock up or garage ground site, please follow the 'Linking Current Tenancies' guide.

2.6.2 Creating a Rent Account

- After creating the tenancy, the 'Create Revenue Account' wizard automatically pops up for completion.

Create Revenue Account

Account Details Debit Breakdowns

Type: Rent Account

Tenancy Start Date: 08/02/2024 Tenancy Name: [REDACTED]

Reporting Property: 132032000 [REDACTED] Kirkintilloch, Glasgow, G66 2...

Account Number: 15140 Check Digit: 6 Payment Reference: 6900151400

Financial Admin Unit: WEEKLY48 - 48 Weeks Rent - Res and Non-Res

Account Start Date: 08/02/2024 [REDACTED]

Alternative Reference: [REDACTED] Pending HB:

Text: [REDACTED]

universal credit recipient: Please Select New Payment Card: Please Select

arrears at uc notification date: [REDACTED] universal credit claim date: [REDACTED]

universal credit pay date: [REDACTED] universal credit housing costs: Please Select

universal credit managed payment request: [REDACTED] universal credit managed payment: Please Select

universal credit managed payment awarded: [REDACTED] universal credit arrears deduction request: [REDACTED]

universal credit arrears deduction: Please Select universal credit arrears deduction award: [REDACTED]

discretionary housing payment: Please Select bedroom tax: Please Select

hardship fund: Please Select hardship fund award date: [REDACTED]

hardship fund award amount: [REDACTED] Rent Acc Comments: [REDACTED]

HB Claimant No: [REDACTED] Rents Warning Message: [REDACTED]

Property Reference	Property Address	Property Type	Residential	Start Date	Allocate
132032000	[REDACTED] Kirkintilloch, Glasgow G66 2ND	Tenement Middle	Y	08/02/2024	<input checked="" type="checkbox"/>

Next Cancel

- Enter all the relevant information in the 'Account Details' page, making sure the account start date is correct, ticking the box if a housing benefit claim is pending, selecting if they are on universal credit and order a new payment card.
- Click 'Next'
- Check all the information is correct in the 'Debit Breakdown' section and if everything is correct click 'Save'

Create Revenue Account

Account Details Debit Breakdowns

Tenure: SST Tenancy Start Date: 08/02/2024

Tenancy Type: SST Num Props: 1

Tenancy Name: [REDACTED]

Gross Rent at A/C Start: 86.60

Start Date	Status	Charge Code	Attribute	Value	Tax Code	Reb	Re
08/02/2024	A	RENT_48W		84.60		<input checked="" type="checkbox"/>	
08/02/2024	A	SC_CCLEAN		2.00		<input checked="" type="checkbox"/>	

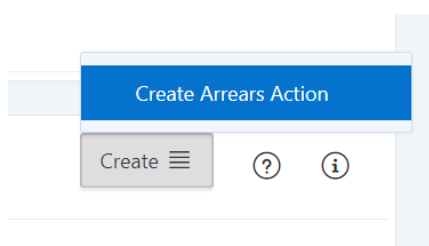
1 - 2

Add Row Previous Cancel Save

If something happens while creating the rent account you can start the process again by going to 'Tenancies', searching for the tenancy that was just created. 'Row Action' the tenancy and select 'Create Revenue Account'. This should only be done when there has been an error. The rent account should always be created alongside the tenancy where possible.

2.6.3 Ordering a New Rent Card

- In '**Revenue Accounts**', search for the rent account using the search or advanced search options
- Select the account you would like to order the new rent card for
- Click '**More**' and then '**Arrears Actions**'
- Click '**Create**' and then '**Create Arrears Action**'



- Complete the '**Create Arrears Action**' wizard by selecting '**PCRD – INFO – Replacement Card Ordered**', put the status as '**Pending**' and add some text to the '**Notepad Text**'

 A screenshot of a web form titled 'Create Account Arrears Action'. The form contains several fields:

- 'Action': A dropdown menu with 'PCRD - INFO - Replacement Card Ordered' selected.
- 'Status': A dropdown menu with 'Authorised' selected.
- 'Action Balance': A text input field containing '-88.15'.
- 'Next Action Date': A date picker field.
- 'Expiry Date': A date picker field.
- 'Review Date': A date picker field.
- 'Effective Date': A date picker field.
- 'Notepad Text': A large text area for entering notes.
- 'Note Type': A dropdown menu with 'Please Select' selected.
- 'Highlighted Ind': A checkbox that is currently unchecked.
- 'Generate Arrears Letter': A checkbox that is currently unchecked.

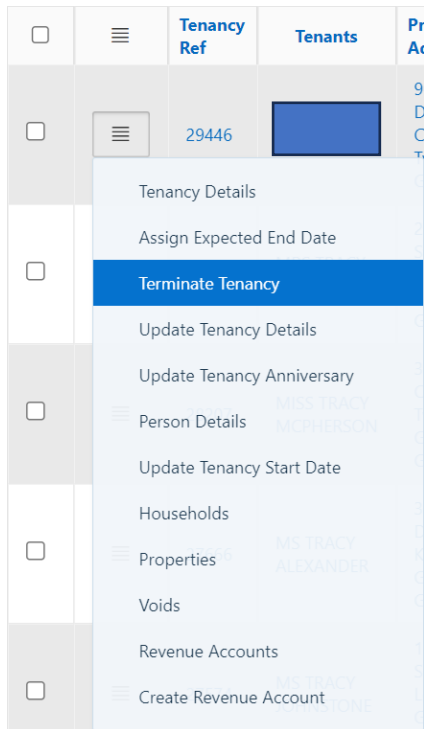
 At the bottom of the form are three buttons: 'Cancel', 'Save', and 'Apply'.

- Click '**Save**'

2.6.4 Terminating a Tenancy and Rent Account

- Ending a tenancy automatically ends a rent account.

- In 'Tenancies', search for the tenancy using the search or advanced search options
- 'Row Action' the tenancy you want to terminate and select 'Terminate Tenancy'



- Complete the 'Terminate Tenancy' wizard starting with the 'Tenancies' page by entering the end date and termination reason.

The 'Terminate Tenancy' wizard is shown with a progress bar at the top. The first step, 'Tenancies', is active. Below the progress bar, the form contains the following fields:

- Tenancy Reference: 28207
- Address: [Redacted]
- Actual End: [Calendar icon]
- Termination Reason: Please Select
- Termination Condition: Please Select
- Survey Code: Please Select

'Next' and 'Cancel' buttons are located at the bottom right of the form.

- Click 'Save'
- Complete the 'People Addresses' page by entering the new address for everyone in the household using the 'Open Search' in the 'Contact Address' column.

Terminate Tenancy

✓ Tenancies
 ● **People Addresses**
● Revenue Accounts
 ● Related Applications
 ● Business Actions

Contact Address

Name	Contact Address	Address Start	Exclude
		01-Jan-2022	N x v

1 - 1

- Click 'Next'
- This then terminates the Revenue Accounts, and a system message will confirm this.

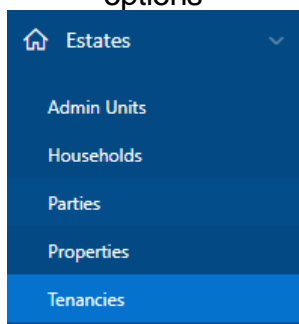
System Messages

⚠ HRA-00241 The following revenue accounts will be terminated :- 352.

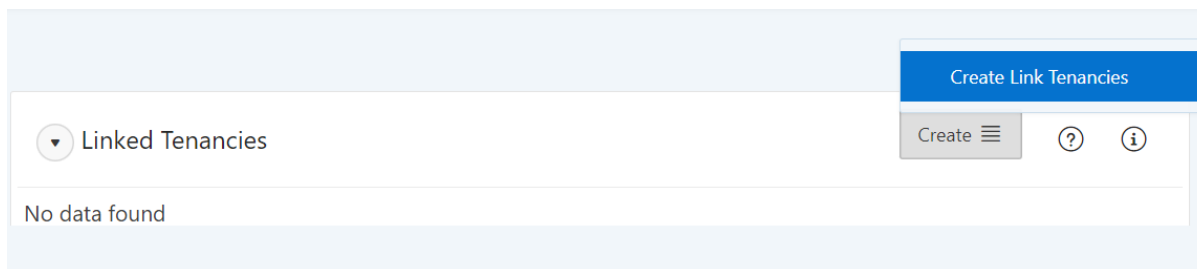
Note: When terminating a tenancy and rent account please follow the 'Linking Former Accounts to Tenancies' guide.

2.6.5 Linking Current Tenancies

- In '**Tenancies**' search for a record using the search or advanced search options



- Select the lock up, garage ground site or decant tenancy you want to link
- Click '**More**' and then '**Linked Tenancies**'
- Click '**Create**' and then '**Create Link Tenancies**'



- Complete the **'Create Linked Tenancies'** wizard remembering to ensure the **'Parent Tcy Ref'** is the main tenancy, you've provided a start date and a linking reason.

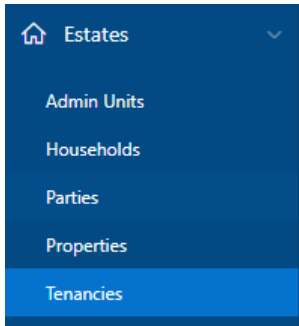
- Click **'Save'**

Note: *Rules for linking:*

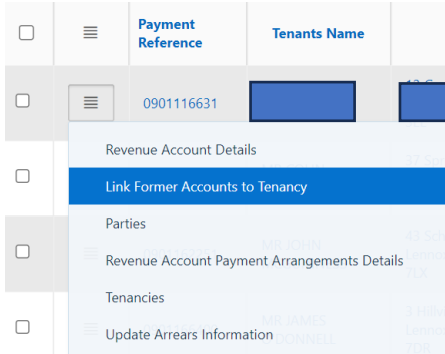
- *The tenant must have at least one Terminated Tenancy with an associated account and one Current Tenancy with a current account.*
 - *You can link any account types to the Current Tenancy e.g. Rent Account, Court Costs, Rechargeable Account, Insurance Account.*
 - *Linking will NOT transfer account balances automatically however balance transfers from former to current accounts can be applied later.*
 - *Non-Tenant Sundry Accounts cannot be linked.*
-

2.7 Linking Former Accounts to Tenancies

- In **'Revenue Accounts'** search for a record using the search or advanced search options



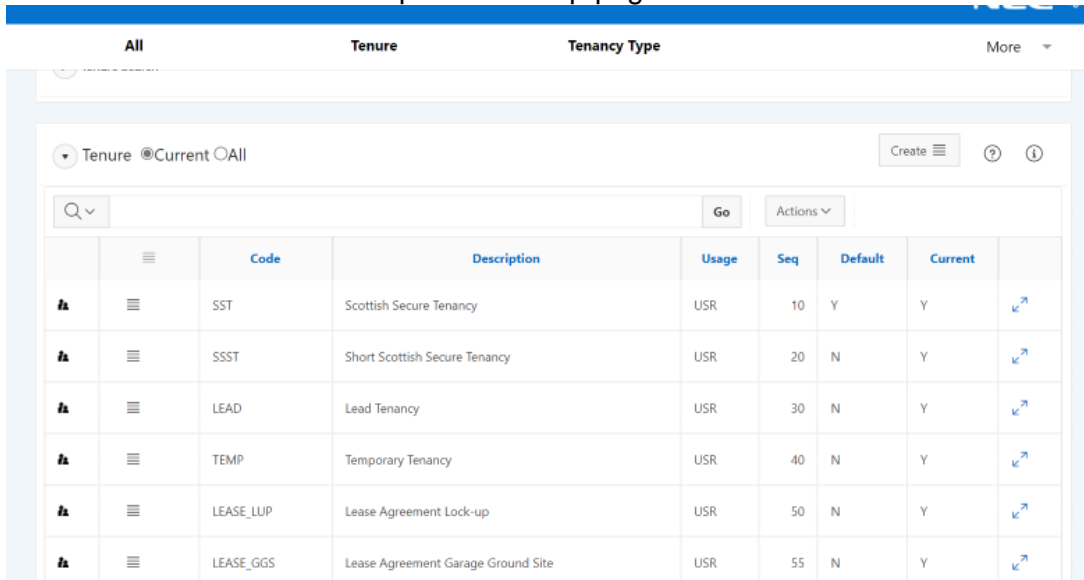
- Select the former account you want to link
- **'Row Action'** and the click **'Link Former Accounts to Tenancies'**



- Complete the **'Link Former Accounts to Tenancy'** wizard with all the relevant data.
- Click **'Save'**

2.7 Creating Tenure Types

- Click System Setup.
- The System Setup area appears with the default product area displayed.
- Click Estates.
- The Estates menu expands.
- Click Tenancies.
- The Tenancies setup page appears.
- Click the Tenure link at the top of the setup page.



- Tip:

- If the link isn't visible at the top of the screen, click More to expand the menu.
- The page refreshes to display the selected region.
- Select Create Tenure from the Create list at the top of the region.

- The Create Tenure form appears.
- Enter the relevant data in the form.
- Tip:
- Click the Help icon at the top of the form for further information.
- Click Save.
- The new tenure type appears in the Tenure region.
- The tenure type is now available to use elsewhere in the system.

2.8 Calendars / Public Holidays

Calendars can be set up to enable the system to calculate target dates and times and for appointment slots to be created against diaries.

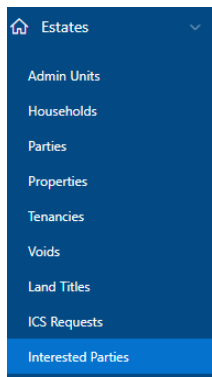
As much of the NEC Housing system is dependent on dates and ranges of dates, system calendars are important in ensuring that actions are directed to working days and not days which are weekends or public holidays.

Three system defined calendar types are provided for Repairs, Voids, and general system use. User defined calendars can also be created. Calendars are used within a specific calendar year and can be used throughout the system and for multiple purposes.

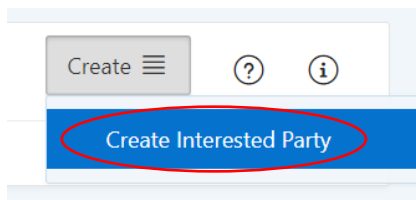
2.9 Interested Parties

2.9.1 Create an Interested Party

- In **'Estates'**, select **'Interested Parties'**



- Select **'Create'** and then **'Create Interested Party'**



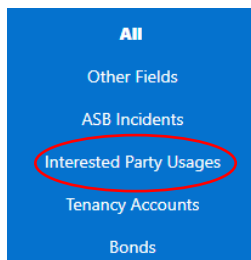
- Click **'Open Search'** and search the system to see if the person already exists. If the person does not exist click **'Create Person'** and follow the **'Create Person'** wizard ensuring you've completed all the mandatory fields. Then complete the rest of the **'Create Interested Party'** wizard.

A screenshot of a 'Create Interested Party' form. The form has a title bar with a question mark, an information icon, and a close icon. The form contains several fields: 'Type' (dropdown), 'Short Name' (text), 'Person Name' (text with a search icon circled in red), 'Organisation Name' (text with a search icon), 'Username' (dropdown), 'Printer' (dropdown), 'Comments' (text), 'Tax Rate' (dropdown), 'Placement Allowed Indicator' (checkbox), 'Contractor Site Code' (dropdown), 'Staff Id' (text), 'Handheld Username' (dropdown), and 'Admin Unit' (dropdown with a search icon). At the bottom right, there are 'Cancel' and 'Save' buttons.

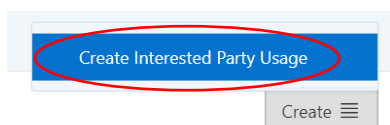
- Click **'Save'**

2.9.2 Add an Interested Party

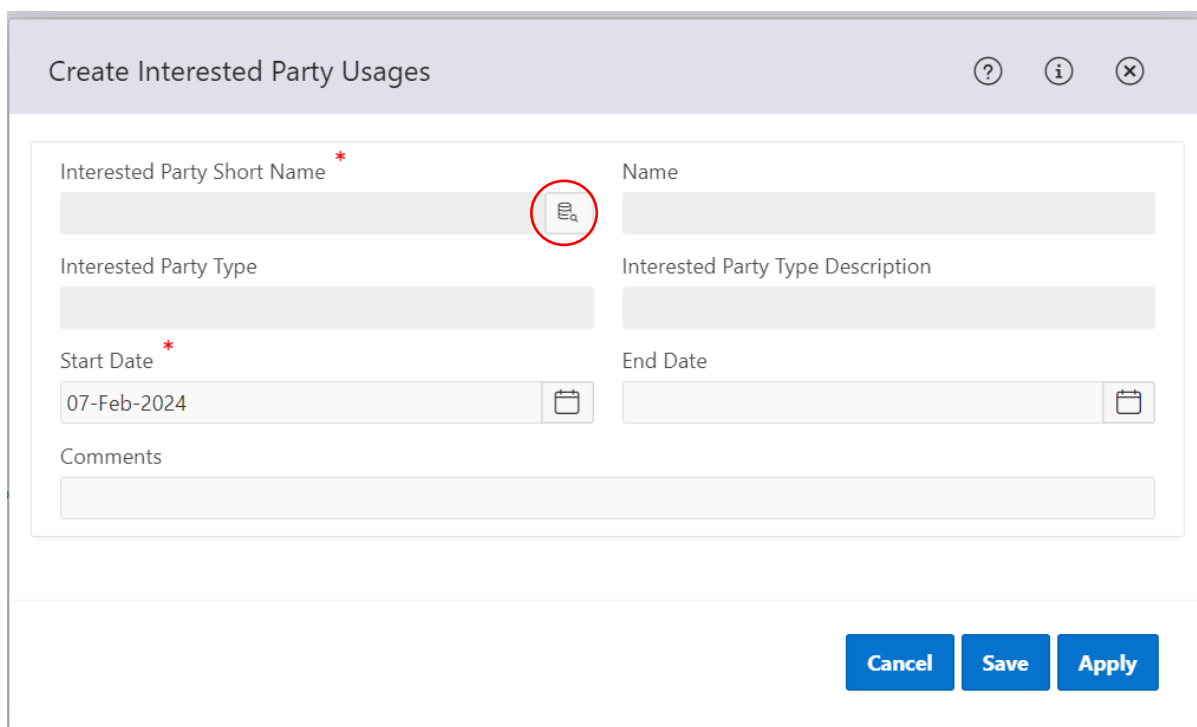
- In **'Tenancies'**, search for a record using the search or advanced search options
- Select the tenancy you would like the interested party to be attached to
- Select **'Interested Party Usage'** from the **'More'** drop down



- Select **'Create'** and then **'Create Interested Party Usage'**



- Complete the **'Create Interested Party Usages'** wizard, remembering to search for the interested party using the **'Open Search'**. If the interested party does not exist click the **'Create'** button and follow the guide for **'How to Create an Interested Party'** and then complete the rest of the wizard



The 'Create Interested Party Usages' wizard form contains the following fields:

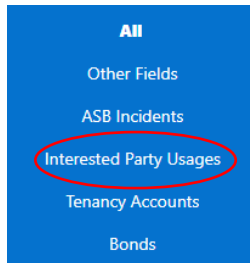
- Interested Party Short Name ***: Text input field with a search icon circled in red.
- Name**: Text input field.
- Interested Party Type**: Text input field.
- Interested Party Type Description**: Text input field.
- Start Date ***: Date input field with a calendar icon, containing '07-Feb-2024'.
- End Date**: Date input field with a calendar icon.
- Comments**: Text area.

At the bottom right, there are three buttons: **Cancel**, **Save**, and **Apply**.

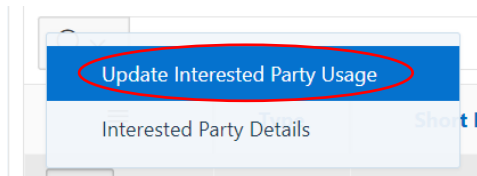
- Click **'Save'**

2.9.3 Update or Remove an Interested Party

- In **'Tenancies'**, search for a record using the search or advanced search options
- Select the tenancy you would like to update or remove the interested party from
- Select **'Interested Party Usage'** from the **'More'** drop down



- **'Row Action'** the interested party you wish to update or remove and **select 'Update Interested Party Usage'**



- Update the **'Update Interested Party Usages'** with the new information and remember to enter an end date if you are removing the interested party
- Click **'Save'**

3. NEC Rents

3.1 Introduction

This guide provides an overview of NEC Rents and the related processes.

3.2 Objectives

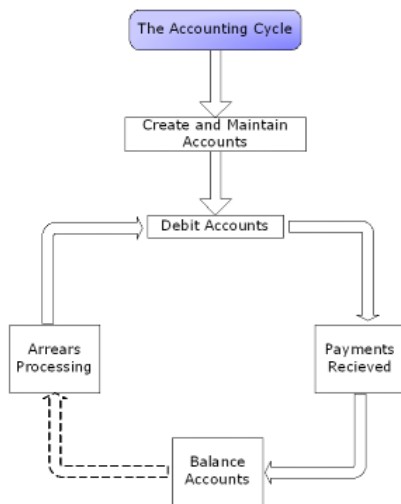
This guide will help you to:

- Understand the main functions of NEC Rents.
- Understand the principles of the Accounting Cycle.
- Understand the Principles of the Financial Admin Years.

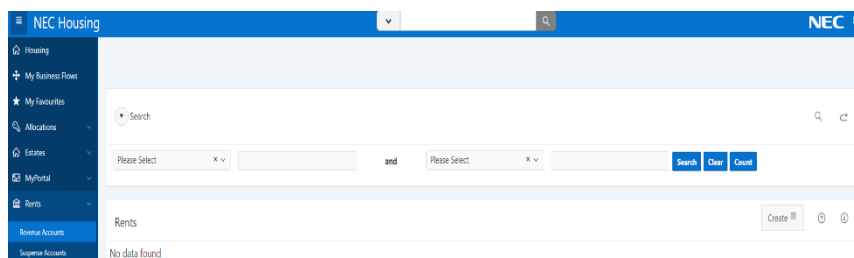
3.3 Main Functions of Rents

- Rent Calculation.
- Account Maintenance (including new, existing and former tenants).
- Payments and Adjustments.
- Suspense Accounts.
- Sundry Accounts.
- Rent Collection.
- Arrears Control.
- Recording Tenant Service Charges if required.
- Year Start/Year End Management.

3.4 Accounting Lifecycle



4. Rent Processes



4.1 Rent Account and Tenancies

4.1.1 Updating Revenue Accounts

- Click Housing.
The Housing menu expands.
- Click Rents.
The Rents menu expands.
- Click Revenue Accounts.
The Revenue Accounts page appears.
- Enter your search criteria in the Search area.

If the Quick Search options do not meet your needs, click the Advanced

Search icon at the top of the Search area, and enter more specific criteria.
 Tip: Click the Help icon at the top of the form for further information.

- Click Search.

Payment Reference	Tenants Name	Address	Start Date	Last Arrears Action	Account Type	Current Balance	Current Account Ind
0901113020	MRS RENE INGLIS	42 Clarinda Court, Kirkintilloch, Glasgow, G66 2SD	09-Feb-1988	VST	REN	654.28	Y
	DOOLE	19 Woodhead Avenue, Kirkintilloch, Glasgow, G66 3DW	01-Sep-1997	CON1	REN	607.68	Y
	ADRIE	Flat 1/1, 34 Kerr Street, Kirkintilloch, Glasgow, G66 1JZ	01-May-2023	CON2	REN	484.35	Y
	DOCHERTY	2/1, 8 Southbank Road, Kirkintilloch, Glasgow, G66 1NH	23-Mar-2015	CON1	REN	704.05	Y
	KOX	108 Ellisland, Kirkintilloch, Glasgow, G66 2UB	24-May-2021	CON1	REN	453.44	Y
	AITKEN	114 Monkland Avenue, Kirkintilloch, Glasgow, G66 3BS	09-Feb-1988	CON1	REN	607.68	Y
	E BOYLE	27 Parkview Avenue, Kirkintilloch, Glasgow, G66 3DB	06-May-2019	CON1	REN	594.15	Y

The records that meet your search criteria appear in the Rents region.

- Select Update Revenue Account from the Row Action list corresponding to the record you want to update.
 The Update Revenue Account Details form appears.
- Enter the relevant data in the form.
 Tip: Click the Help icon at the top of the form for further information.
- Click Save.
 The form closes and you are returned to the Rents region.
 The changes you made to the revenue account have been applied.

4.1.2 Updating Tenancy Start Dates

- Click Housing.
 The Housing menu expands.
- Click Estates.
 The Estates menu expands.
- Click Tenancies.
 The Tenancies page appears.

- Enter your search criteria in the Search area.
 If the Quick Search options do not meet your needs, click the Advanced Search icon at the top of the Search area, and enter more specific criteria.
 Tip: Click the Help icon at the top of the form for further information.
- Click Search.

Tenancy Ref	Tenants	Property Address	Start Date	Tenure	Tenancy	Res	Ntp	RTB	Vis	Lnk
38237	MIR MOHAMMAD EUGENIY, MRS ESRAA ABDELMOHEARN	49 Castleshill Road, Bearsden, Glasgow, G61 4DZ	06-Aug-2024	SST	SST	Y	N	N	N	N
	Tenancy Details									
	Assign Breached End Date	IAN GILMARTIN	4 Watt Place S, Milngavie, Glasgow, G62 7LQ	01-Aug-2024	SST	SST	Y	N	N	N
	Terminate Tenancy	EGOSHA BOTTOMLEY	88 Burns Court, Kirkintilloch, Glasgow, G66 2NR	07-Aug-2024	SST	SST	Y	N	N	N
	Update Tenancy Details									
	Update Tenancy Anniversary	MAMA MCKENZRY	45 St. Marys Road, Bishopton, Glasgow, G64 2EH	19-Aug-2024	SST	SST	Y	N	N	N
	Apply Stamp									
	Update Tenancy Start Date	EBORAH TAYLOR	36 Nithsdale Crescent, Bearsden, Glasgow, G61 4HY	08-Aug-2024	SST	SST	Y	N	N	N
	Household									
	Proposals	IE CRAIG	53 Ashburn Road, Milngavie, Glasgow, G62 7PQ	21-Aug-2024	SST	SST	Y	N	N	N
	Visits									
	Applications	GEORGINA SHARPE	83 Oxford Street, Kirkintilloch, Glasgow, G66 1LQ	02-Aug-2024	SST	SST	Y	N	N	N
	Revenue Services									

The records that meet your search criteria appear in the Tenancies region.

- Select Update Tenancy Start Date from the Row Action list corresponding to the record you want to update the start date for.
 The Update Tenancy Start Date form appears.
- Enter the relevant data in the form.
 Tip: Click the Help icon at the top of the form for further information.
- Click Save.
 The form closes and you are returned to the Tenancies region.
 The changes you made to the tenancy start date have been applied.

4.1.3 Cancelling a Rent Account and Tenancy Made in Error

- Click System Setup.
 The System Setup area appears with the default product area displayed.
- Click Estates.
 The Estates menu expands.
- Click Tenancies.
 The Tenancies setup page appears.

- Click the Cancel Reason link at the top of the setup page.

The screenshot shows a web interface for managing 'Cancel Reason'. At the top, there is a navigation menu with the following items: All, Tenure, Tenancy Type, More (with a dropdown arrow), Source, Term Reason, **Cancel Reason** (highlighted in yellow), Status, Conditions, Stop Code, Services, Proxy Type, NTQ Reasons, RTB Withdrawn, RTB Denied, and Link Reasons. Below the menu is a section titled 'Cancel Reason' with radio buttons for 'Current' (selected) and 'All'. There is a 'Create' button with a dropdown arrow, a help icon, and an info icon. A search bar with a 'Go' button and an 'Actions' dropdown is present. The main table has the following data:

	Code	Description	Usage	Seq	Default	Current	
	DECEASED	Tenant deceased	USR	-	N	Y	↗
	ERROR	Raised in error	USR	-	N	Y	↗
	OTHER	Other	USR	-	N	Y	↗

Page 1 - 3

- Tip: If the link isn't visible at the top of the screen, click More to expand the menu. The page refreshes to display the selected region.

The screenshot shows the 'Create Cancel Reason' form. The form has the following fields and controls:

- Code ***: Text input field.
- Description ***: Text input field.
- Seq**: Text input field.
- Default**: Checkbox (unchecked).
- Current**: Checkbox (checked).
- Comments**: Text area.

At the bottom right, there are three buttons: **Cancel**, **Save**, and **Apply**.

- Select Create Cancel Reason from the Create list at the top of the region. The Create Cancel Reason form appears.
- Enter the relevant data in the form. Tip: Click the Help icon at the top of the form for further information.
- Click Save. The new tenancy cancellation reason appears in the Cancel Reason region. The tenancy cancellation reason is now available to use elsewhere in the system.

4.1.4 Reinstate a Rent Account and Tenancy

- Click Housing.
The Housing menu expands.
- Click Rents.
The Rents menu expands.
- Click Revenue Accounts.
The Revenue Accounts page appears.
- Enter your search criteria in the Search area.
If the Quick Search options do not meet your needs, click the Advanced Search icon at the top of the Search area, and enter more specific criteria.
Tip: Click the Help icon at the top of the form for further information.
- Click Search.

Payment Reference	Tenants Name	Address	Start Date	Last Arrears Action	Account Type	Current Balance	Current Account Ind
090111000	MRS RENEE INGLIS	41 Clairide Court, Kirkintilloch, Glasgow, G66 7JD	09-Feb-1988		REN	92.38	Y
	Revenue Account Details						
	Document Management	DDJ F	19 Woodhead Avenue, Kirkintilloch, Glasgow, G66 3JW	01-Sep-1997	CLRD	-101.28	Y
	Link (only available to tenants)	DSBF	Flat 1/1, 34 Kerr Street, Kirkintilloch, Glasgow, G66 1J7	01-May-2003	COM1	103.74	Y
	Managed Account (Customer Policy Assignments)						
	Parties	YOCHREYN	2/1, 8 Southbank Road, Kirkintilloch, Glasgow, G66 1N4	23-Mar-2015	APM	-80.25	Y
	Revenue Account Payment Arrangements Details						
	Tenancies	EDX	108 Pittwater, Kirkintilloch, Glasgow, G66 7JH	24-May-2021	CLRD	-163.22	Y
	Tenure Account Balance						
	Update Arrears Information	ATKEN	114 Monkland Avenue, Kirkintilloch, Glasgow, G66 3BS	09-Feb-1988	CLRD	-101.28	Y
	Update Revenue Account	SCWLF	27 Parkview Avenue, Kirkintilloch, Glasgow, G66 3DB	06-May-2019	CLRD	-114.81	Y
0901146180	MR FRANCIS MILLEDON	28 Wavergreen Avenue, Kirkintilloch, Glasgow, G66 4AQ	09-Feb-1988		REN	-105.70	Y
0901152710	MRS ELLEN LOGAN	3 Ruthven Place, Bishopbriggs, Glasgow, G64 1JX	09-Feb-1988		APM	-0.08	Y
0901156580	MRS WYNNE MOORE	8 East Springfield Terrace, Bishopbriggs, Glasgow, G64 1RS	09-Feb-1988		REN	-17.42	Y
0901158703	MR DONALD MCMORROW	5 Craigil Square, Bishopbriggs, Glasgow, G64 1HP	26-Aug-2016		REN	-88.06	Y
0901160791	MRS PAMELA KIMMETT	23 Millburn Street, Lemiestown, Glasgow, G66 7TE	26-Sep-2016		COM1	55.00	Y
0901164890	MS MARGARET CRAIG	44 Millburn Street, Lemiestown, Glasgow, G66 7TE	09-Feb-1988		MPPL	949.21	Y
0901171810	MR JOHN COLPLAND	89 Carnegie Road, Torrance, Glasgow, G64 4BP	09-Feb-1988		MPPL	302.54	Y

The records that meet your search criteria appear in the Rents region.

- Select Update Revenue Account from the Row Action list corresponding to the record you want to update.

Update Revenue Account Details

Payment Reference: 090111000 | AR Ref: | Start Date: 09-Feb-1988 | Account Due Day: | Pending MB:

Account Type:

Date First in Arrears: | UC Recipient:

Amounts of UC Claim Date: | UC Claim Date:

UC Payment Date: | UC Housing Cost:

UC Managed Payment Requested: | UC Managed Payment:

UC Managed Payment Awarded / Declined: | UC Arrears Deduction Requested:

UC Arrears Deduction: | UC Arrears Deduction Awarded / Declined:

DHP Case: | DHP AWARD:

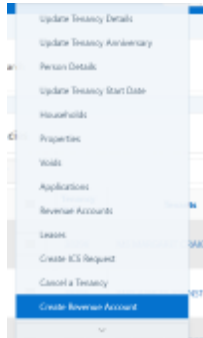
DHP End Date: | Bedroom Tax Case:

The Update Revenue Account Details form appears.

- Enter the relevant data in the form.
Tip: Click the Help icon at the top of the form for further information.
- Click Save.
The form closes and you are returned to the Rents region.
The changes you made to the revenue account have been applied.

4.1.5 Creating a Sequestered and DAS Rent Account

- From any page on the 'Housing' modules navigation on the left-hand side find and select 'Estates' and then 'Tenancies'
- Search for the tenancy you are attaching the account to using the search or advanced search options
- Row Action the tenancy you want and select 'Create Revenue Account'



- Complete the 'Create Revenue Account' wizard ensuring to select the type 'Sundry Tenancy Account' and then choose the account type required from the drop down. Complete the rest of the wizard.

Create Revenue Account

Account Details | Debit Breakdowns

Type * Sundry Tenancy Account x v Account Type * Please Select x v

Tenancy Start Date 11-Sep-2024 Tenancy Name MS M CRAIG

Reporting Property * 132016546 - 44 Millburn Street, Lennoxton, Glasgow, G66 7... v

Account Number 7044 Check Digit 7 Payment Reference 7901164892

Financial Admin Unit WEEKLY48 - 48 Weeks Rent - Res and Non-Res

Account Start Date * 11-Sep-2024 Account End Date Account Due Date

Alternative Reference

Text

Next Cancel

- Click 'Next'
- Complete the 'Debit Breakdown' section of the wizard.

Create Revenue Account

Account Details | Debit Breakdowns

Tenure SST Tenancy Start Date 11-Sep-2024

Tenancy Type SST Num Props 0

Tenancy Name MS M CRAIG

Gross Rent at A/C Start 0.00

No data found

Add Row Previous Cancel Save

-
- Click 'Save'

4.2 Direct Debits

Direct Debit instructions (DDI) are requests made by revenue account holders to have charges deducted via BACS and Direct Debit systems from their bank accounts.

If the COI_FOR_FORMER_RECS system parameter is set to Y, and a conflict of interest exists with an access level of 'none', the DDI will not be displayed on the Direct Debit Instructions summary page. However, if the access level is 'read', the DDI will be displayed but you will not be able to perform any actions against it. You will only be able to view the details of the DDI.

The Direct Debit Instructions region provides a historical view of this information and

The screenshot shows the 'Method Types' section of the NEC Housing system. The table lists various payment methods with columns for Code, Description, Regular, Extractable, Cash, Usage, Seq No, Default, and Current. The 'Current' column includes a small icon for each row.

Code	Description	Regular	Extractable	Cash	Usage	Seq No	Default	Current
CR	Cash Receipting	N	N	N	SYS	-	N	Y
DD	Direct Debit	Y	Y	N	SYS	-	N	Y
KC	Rent Collector	N	N	N	SYS	-	N	Y
SO	Standing Order	N	N	N	SYS	-	N	Y
GI	Post Office Giro	N	N	N	SYS	-	N	Y
LIC	Universal Credit	N	N	N	USR	-	N	Y
HB	Housing Benefit	N	N	N	USR	-	N	Y
KA	DDP Rent Account	N	N	N	USR	-	N	Y

displays details such as:

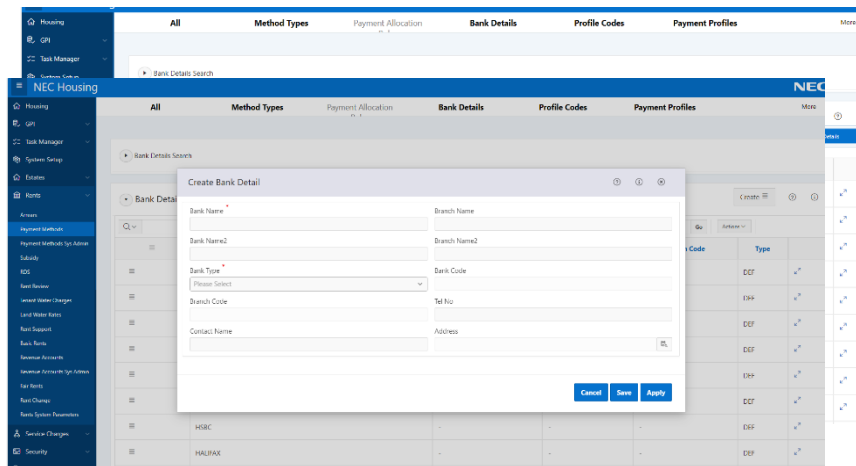
Direct Debit Statuses

Requestor Names

Payment Reference Number

4.2.1 Creating Bank Details

- Click System Setup.
The System Setup area appears with the default product area displayed.
- Click Rents
The Rents menu expands.
- Click Payment Methods.
The Payment Methods setup page appears.
- Click the Bank Details link at the top of the setup page.
Tip: If the link isn't visible at the top of the screen, click More to expand the menu.
The page refreshes to display the selected region.
- Select Create Bank Details from the Create list at the top of the region.

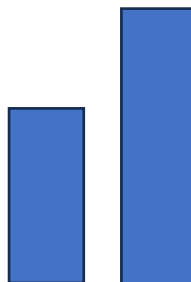


The Create Bank Detail form appears.

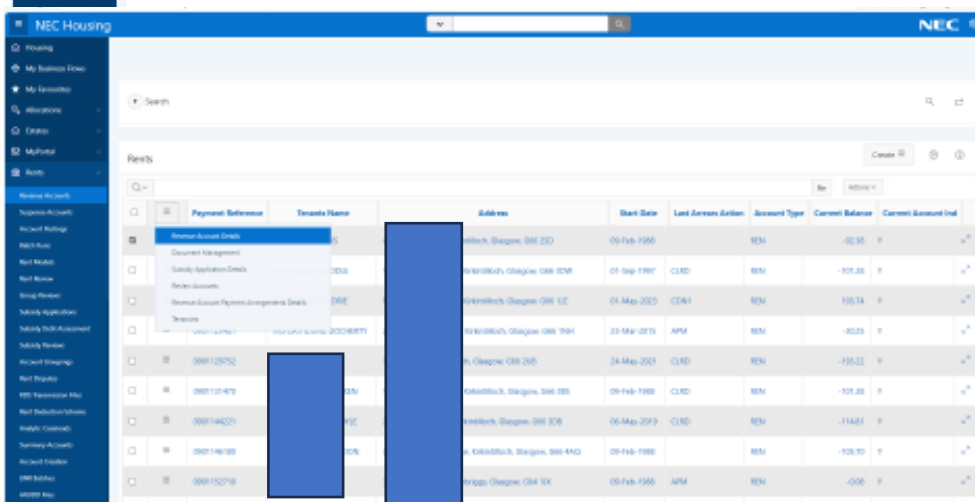
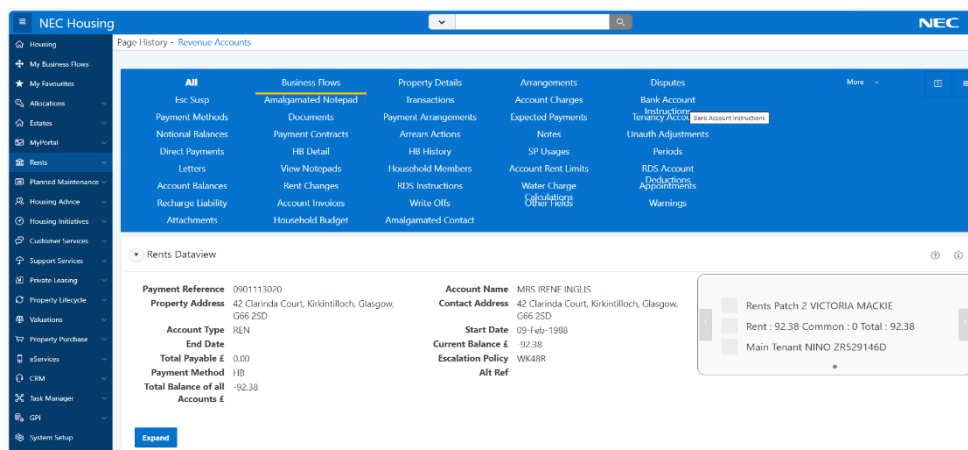
- Enter the relevant data in the form.
 Tip: Click the Help icon at the top of the form for further information.
- Click Save.
 The new bank detail appears in the Bank Details region.
 The bank detail is now available to use elsewhere in the system.

4.2.2 Creating Bank Account Instructions

- Click Housing.
 The Housing menu expands.
- Click Rents.
 The Rents menu expands.
- Click Revenue Accounts.
- The Revenue Accounts page appears.
- Enter your search criteria in the Search area.
 If the Quick Search options do not meet your needs, click the Advanced Search icon at the top of the Search area, and enter more specific criteria.
 Tip: Click the Help icon at the top of the form for further information.
- Click Search.
 The records that meet your search criteria appear in the Rents region.
 Do one of the following:
 To select multiple records, check the corresponding boxes, then select Revenue Account Details from the Bulk Actions list in the table



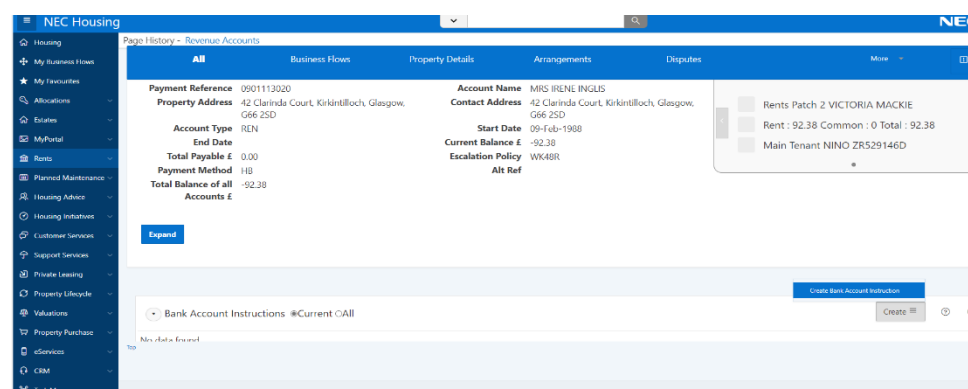
heading.



To select a single record, select Revenue Account Details from the corresponding Row Action list.

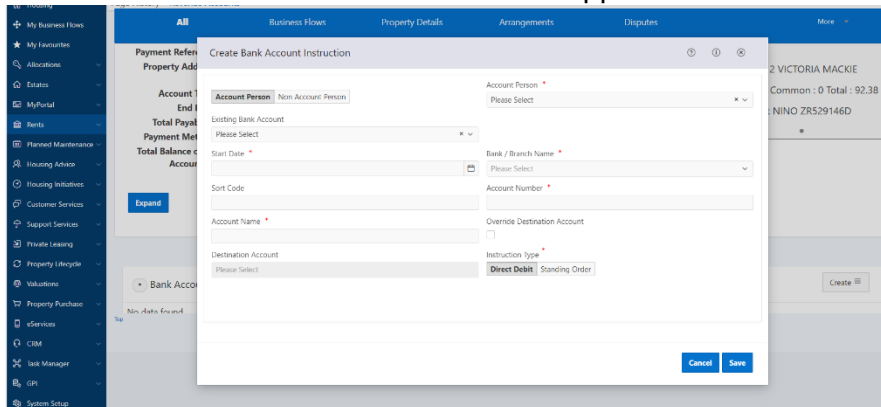
The Rents details page appears.

- Click the Bank Account Instructions link at the top of the screen.
 Tip: If this link is not visible at the top of the screen, click More to expand the menu.



The page refreshes to display the selected region.

- Select Create Bank Account Instruction from the Create list at the top of the region.
 The Create Bank Account Instruction form appears.



- Enter the relevant data in the form.
 Tip: Click the Help icon at the top of the form for further information.
- Click Save.
 The form closes and you are returned to the Bank Account Instructions region.
 The bank account instructions have been created.

4.2.3 Updating Bank Account Instructions

You can only complete this task if the record selected has a Type of REN - Revenue Accounts.

- Click Housing.
 The Housing menu expands.
- Click Estates.
 The Estates menu expands.
- Click Admin Unit.
 The Admin Unit page appears.
- Enter your search criteria in the Search area.
 If the Quick Search options do not meet your needs, click the Advanced Search icon at the top of the Search area, and enter more specific criteria.
 Tip: Click the Help icon at the top of the form for further information.
- Click Search.
 The records that meet your search criteria appear in the Admin Units region.
 Do one of the following:
 To select multiple records, check the boxes corresponding to the records you require, then select Admin Unit Details from the Bulk Actions list in the table heading.
 To select a single record, select Admin Unit Details from the corresponding Row Action list.
 The Admin Unit details page appears.
- Click the Admin Unit Financial Details link at the top of the screen.
 Tip: If this link is not visible at the top of the screen, click More to expand the menu.
 The system scrolls down to the Admin Unit Financial Details region.
- Select Update Bank Account Details from the Row Action list corresponding to the record you want to update.

The Update Bank Account Details form appears.

- Enter the relevant data in the form.
 Tip: Click the Help icon at the top of the form for further information.
- Click Save.
 The form closes and you are returned to the Admin Unit Financial Details region.
 The changes you made to the bank account details have been applied.

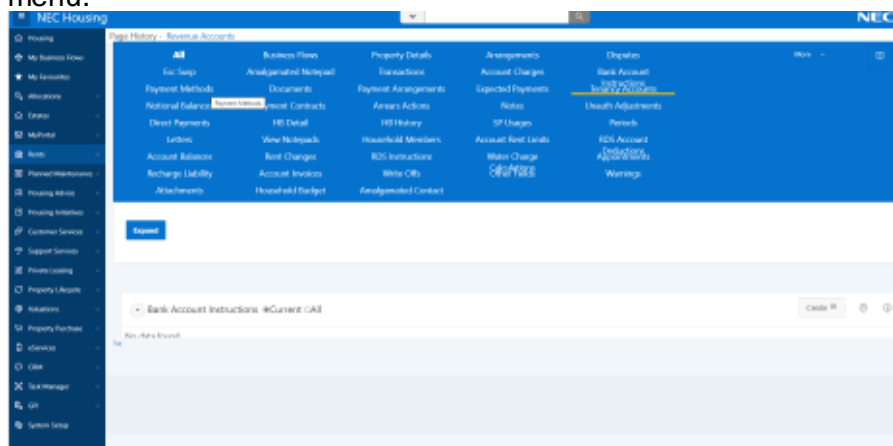
4.2.4 Payment Methods

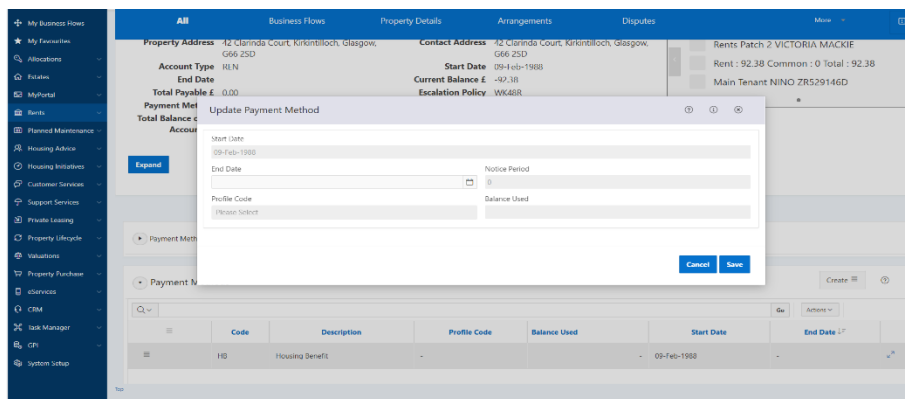
When making a payment to or on behalf of a client the method of payment needs to be recorded. For example, this might be by cash, cheque, voucher etc.

4.2.4.1 Updating Payment Methods

Tip: You can only complete this task if the payment method selected does not have an End Date.

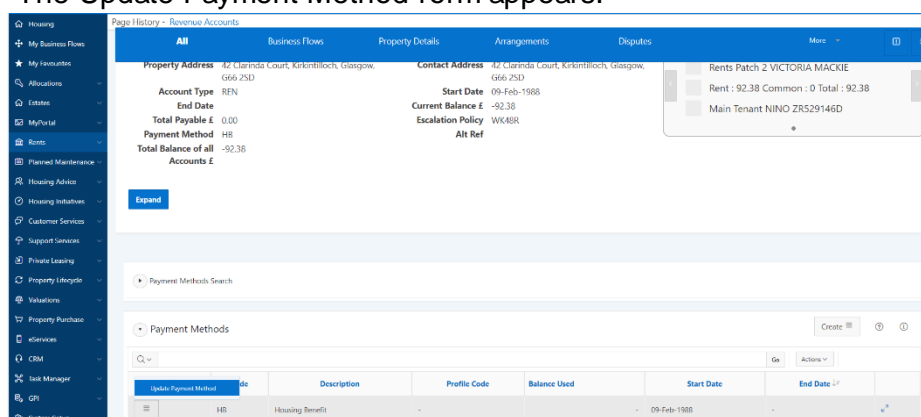
- Click Housing.
- The Housing menu expands.
- Click Rents.
 The Rents menu expands.
- Click Revenue Accounts.
 The Revenue Accounts page appears.
- Enter your search criteria in the Search area.
 If the Quick Search options do not meet your needs, click the Advanced Search icon at the top of the Search area, and enter more specific criteria.
 Tip: Click the Help icon at the top of the form for further information.
- Click Search.
 The records that meet your search criteria appear in the Rents region.
 Do one of the following:
 To select multiple records, check the corresponding boxes, then select Revenue Account Details from the Bulk Actions list in the table heading.
 To select a single record, select Revenue Account Details from the corresponding Row Action list.
 The Rents details page appears.
- Click the Payment Methods link at the top of the screen.
 Tip: If this link is not visible at the top of the screen, click More to expand the menu.





The system scrolls down to the Payment Methods region.

- Select Update Payment Method from the Row Action list in the row corresponding to the record you want to select.
 The Update Payment Method form appears.



- Enter the relevant data in the form.
 Tip: Click the Help icon at the top of the form for further information.
- Click Save.
 The form closes and you are returned to the Payment Methods region.
 The changes you made to the payment method have been applied.

4.2.5 Checking Payment Instalments

- Click Housing.
 The Housing menu expands.
- Click Rents.
 The Rents menu expands.
- Click Revenue Accounts.
 The Revenue Accounts page appears.
- Enter your search criteria in the Search area.
 If the Quick Search options do not meet your needs, click the Advanced Search icon at the top of the Search area, and enter more specific criteria.
 Tip: Click the Help icon at the top of the form for further information.
- Click Search.
 The records that meet your search criteria appear in the Rents region.
 Do one of the following:
 To select multiple records, check the boxes corresponding to the records you require, then select Revenue Account Details from the Bulk Actions list in the

table heading.

Payment Reference	Tenants Name	Address	Start Date	Current Balance
090113020	MRS IRENE INGLIS	42 Clarinda Court, Kirkintilloch, Glasgow, G66 2SD	09-Feb-1988	-92.38
090113021	MRS IRENE INGLIS	42 Clarinda Court, Kirkintilloch, Glasgow, G66 2SD	09-Feb-1988	-92.38
090113022	MRS IRENE INGLIS	42 Clarinda Court, Kirkintilloch, Glasgow, G66 2SD	09-Feb-1988	-92.38
090113023	MRS IRENE INGLIS	42 Clarinda Court, Kirkintilloch, Glasgow, G66 2SD	09-Feb-1988	-92.38
090113024	MRS IRENE INGLIS	42 Clarinda Court, Kirkintilloch, Glasgow, G66 2SD	09-Feb-1988	-92.38
090113025	MRS IRENE INGLIS	42 Clarinda Court, Kirkintilloch, Glasgow, G66 2SD	09-Feb-1988	-92.38
090113026	MRS IRENE INGLIS	42 Clarinda Court, Kirkintilloch, Glasgow, G66 2SD	09-Feb-1988	-92.38
090113027	MRS IRENE INGLIS	42 Clarinda Court, Kirkintilloch, Glasgow, G66 2SD	09-Feb-1988	-92.38
090113028	MRS IRENE INGLIS	42 Clarinda Court, Kirkintilloch, Glasgow, G66 2SD	09-Feb-1988	-92.38
090113029	MRS IRENE INGLIS	42 Clarinda Court, Kirkintilloch, Glasgow, G66 2SD	09-Feb-1988	-92.38
090113030	MRS IRENE INGLIS	42 Clarinda Court, Kirkintilloch, Glasgow, G66 2SD	09-Feb-1988	-92.38

To select a single record, select Revenue Account Details from the corresponding Row Action list.

Page History - Revenue Accounts

Account Name: MRS IRENE INGLIS
Contact Address: 42 Clarinda Court, Kirkintilloch, Glasgow, G66 2SD
Start Date: 09-Feb-1988
Current Balance £: -92.38
Escalation Policy: WK48R
Alt Ref:

Payment Reference: 090113020
Property Address: 42 Clarinda Court, Kirkintilloch, Glasgow, G66 2SD
Account Type: REN
End Date: 0.00
Total Payable £: 0.00
Payment Method: HB
Total Balance of all Accounts £: -92.38

Menu: All, Business Flows, Property Details, Arrangements, Disputes, More

Expand

The Revenue Account Details page appears.

- Click the Household Members link at the top of the screen.
 Tip: If this link is not visible at the top of the screen, click More to expand the menu.

Page History - Revenue Accounts

Account Name: MRS IRENE INGLIS
Contact Address: 42 Clarinda Court, Kirkintilloch, Glasgow, G66 2SD
Start Date: 09-Feb-1988
Current Balance £: -92.38
Escalation Policy: WK48R
Alt Ref:

Payment Reference: 090113020
Property Address: 42 Clarinda Court, Kirkintilloch, Glasgow, G66 2SD
Account Type: REN
End Date: 0.00
Total Payable £: 0.00
Payment Method: HB
Total Balance of all Accounts £: -92.38

Household Members

Name	Date of Birth	Age	Rel	Start Date	End Date	At Risk?
Mrs Irene Inglis	03-Nov-1939	81	MANN	09-Feb-1988		N

The system scrolls down to the Household Members region.

- Select Party Payment Arrangements Details from the Row Action list corresponding to the record you want to view the details for. The Person Details page appears.

You can now view the party payment arrangements.

4.2.6 Updating Payment Instalments

- Click Housing.
The Housing menu expands.
- Click Rents.
The Rents menu expands.
- Click Revenue Accounts.
The Revenue Accounts page appears.
- Enter your search criteria in the Search area.
If the Quick Search options do not meet your needs, click the Advanced Search icon at the top of the Search area, and enter more specific criteria.
Tip: Click the Help icon at the top of the form for further information.
- Click Search.
The records that meet your search criteria appear in the Rents region.

Payment Reference	Tenants Name	Address	Start Date	Last Amers Action	Account Type	Current Balance	Current Account Ind
Revenue Account Details	IS	47 Clarinda Court, Kirkintilloch, Glasgow, G66 2SD	09-Feb-1988		REN	92.38	Y
Revenue Management							
Service Application Details	JULL	19 Woodhead Avenue, Kirkintilloch, Glasgow, G66 2DW	01-Sep-1997	CLRD	REN	-101.28	Y
Revenue Accounts							
Revenue Account Payment Arrangements Details	CRB	Flat 1/1, 34 Glen Street, Kirkintilloch, Glasgow, G66 1JZ	01-May-2003	CONF	REN	163.74	Y
Revenue							
Revenue Accounts							
Revenue Account Details							
Revenue Management							
Service Application Details							
Revenue Accounts							
Revenue Account Details	MR ANDREW KNICK	100 Dalsland, Kirkintilloch, Glasgow, G66 2UB	26-May-2021	CLRD	REN	-193.22	Y
Revenue Management							
Service Application Details							
Revenue Accounts							
Revenue Account Details	MR J. FREDERICK ALTYEN	214 Merchiston Avenue, Kirkintilloch, Glasgow, G66 3BS	09-Feb-1988	CLRD	REN	101.28	Y
Revenue Management							
Service Application Details							
Revenue Accounts							

Do one of the following:

To select multiple records, check the corresponding boxes, then select Revenue Account Payment Arrangements Details from the Bulk Actions list in the table heading.

To select a single record, select Revenue Account Payment Arrangements Details from the corresponding Row Action list.

The Rents details page appears.

- Click the Payment Arrangements link at the top of the screen.
Tip: If this link is not visible at the top of the screen, click More to expand the menu.
The page refreshes to display the selected region.
- Select Update Payment Arrangement from the Row Action list in the row

Payment Arrangements

Property Address: 42 Clarinda Court, Kirkintilloch, Glasgow, G66 2SD

Account Type: REN

Start Date: 09-Feb-1988

Current Balance: -92.38

Escalation Policy: WKBR

Alt Ref

Payment Method: RD

Total Payable: 0.00

Total Balance of all Accounts: -92.38

Payment Arrangements: #Current | All

corresponding to the record you want to select.

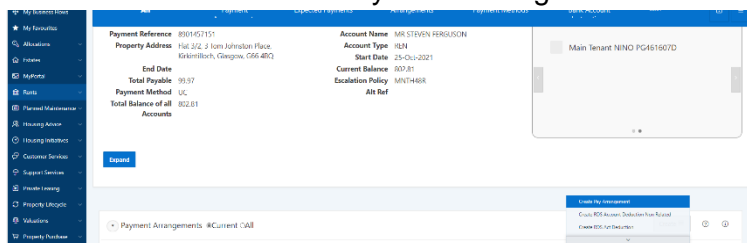
The Update Payment Arrangement form appears.

- Enter the relevant data in the form.
Tip: Click the Help icon at the top of the form for further information.

- Click Save.
 The form closes and you are returned to the Payment Arrangements region.
 The changes you made to the payment arrangement have been applied.

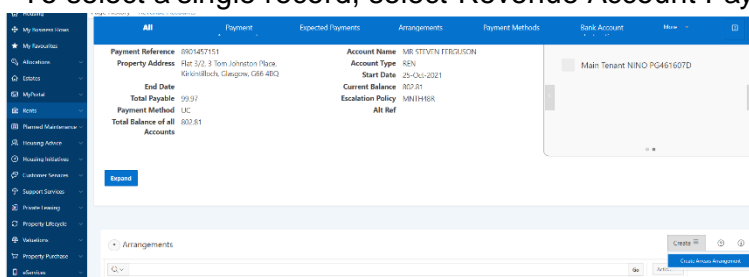
4.2.7 Creating Fixed Payments

- Click Housing.
 The Housing menu expands.
- Click Rents.
 The Rents menu expands.
- Click Revenue Accounts.
 The Revenue Accounts page appears.
- Enter your search criteria in the Search area.
 If the Quick Search options do not meet your needs, click the Advanced Search icon at the top of the Search area, and enter more specific criteria.
 Tip: Click the Help icon at the top of the form for further information.
- Click Search.
 The records that meet your search criteria appear in the Rents region.
 Do one of the following:
 To select multiple records, check the corresponding boxes, then select Revenue Account Payment Arrangements Details from the Bulk



Actions list in the table heading.

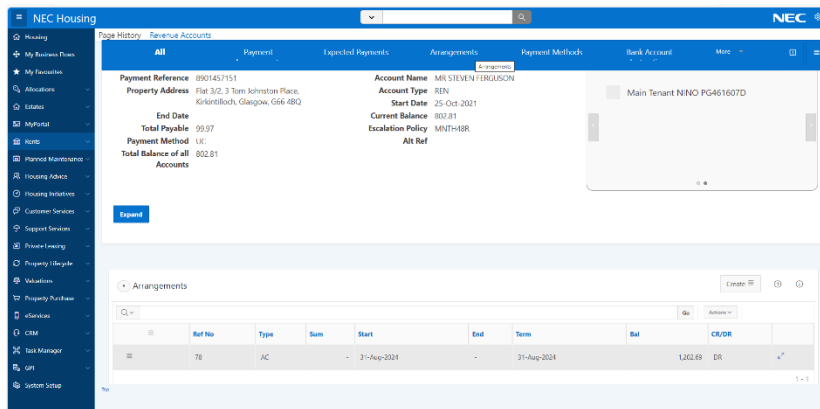
To select a single record, select Revenue Account Payment Arrangements



Details from the corresponding Row Action list.

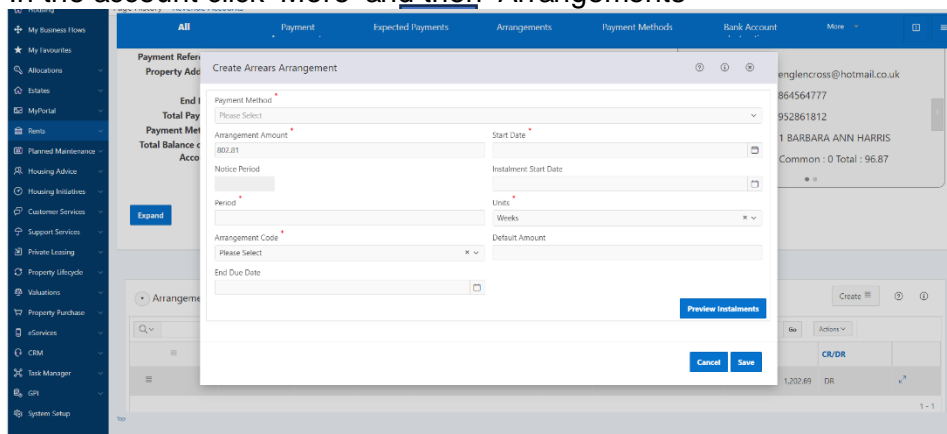
The Rents details page appears.

- Click the Payment Arrangements link at the top of the screen.
 Tip: If this link is not visible at the top of the screen, click More to expand the menu.
 The page refreshes to display the selected region.
- Select Create Pay Arrangement from the Create list at the top of the region.
 The Create Payment Arrangement form appears.
- Enter the relevant data in the form.
 Tip: Click the Help icon at the top of the form for further information.
- Click Save.
 The form closes and you are returned to the Payment Arrangements region.
 The payment arrangement has been created.



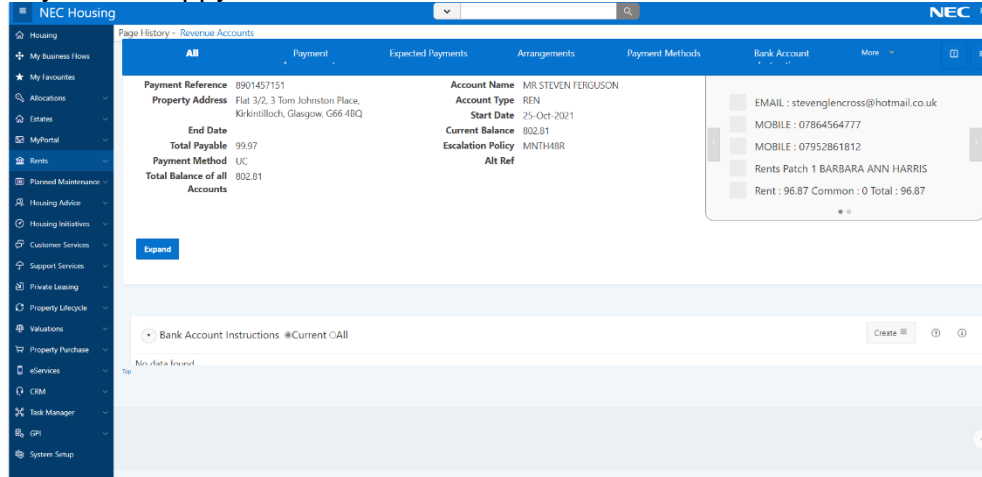
4.2.8 Creating Direct Debits via Payment Arrangements

- From any page on the 'Housing' modules navigation on the left-hand side find and select 'Rents' and then 'Revenue Accounts'
- In 'Revenue Accounts', search for the person whose direct debit you would like to set up using the search or advanced search options.
- Select the account.
- In the account click 'More' and then 'Arrangements'



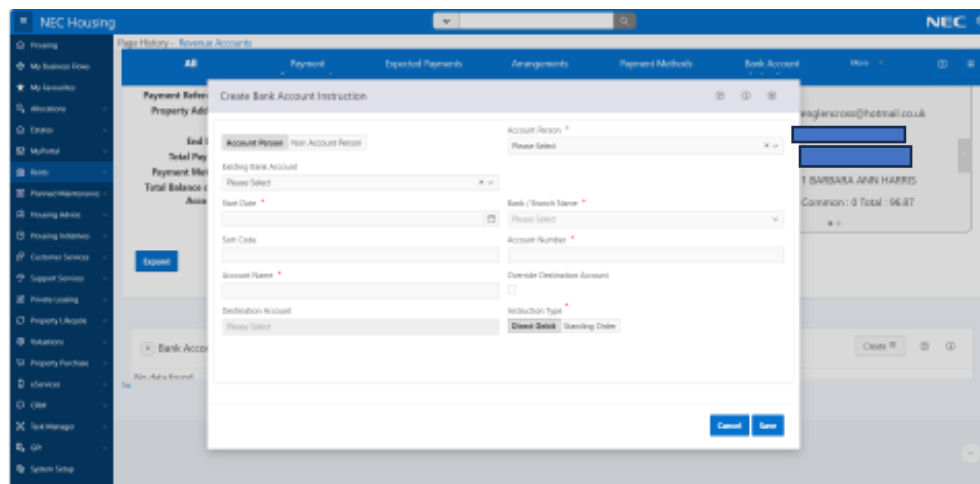
- Click 'Create' and then 'Create Arrears Arrangement'
- 'Complete the 'Create Arrears Arrangement' wizard ensuring to complete the following.
 - Payment method - Should be Direct Debit
 - Arrangement Amount – Total amount of arrears
 - Start Date – The day the agreement was made
 - Instalment Start Date – The day the first payment is due, i.e. 1st or 15th of the month
 - Period - 1
 - Units - Months
 - Arrangement Code – The arrears action "AC"
 - Default Amount - Fixed Amount agreed by the tenant.'
- Click 'Preview Instalments'

- If you are happy with the instalments due click 'Save' if not edit the arrears



agreement above and then click 'Preview Instalments' again until you are happy with this.

- You must create a bank account instruction before this step.



You have created a direct debit via the payment arrangement

4.2.9 Sending Direct Debit Letters

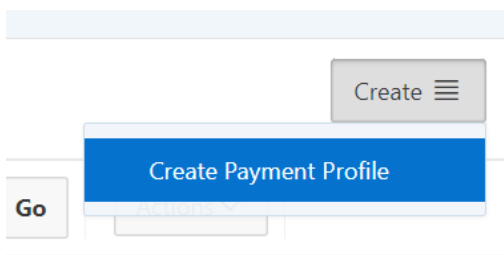
- From any page on the 'Housing' modules navigation on the left-hand side find and select 'Rents' and then 'Revenue Accounts'
- In 'Revenue Accounts', search for the person whose direct debit letter you would like to send using the search or advanced search options.

- Rents
- Arrears
- Payment Methods**
- Payment Methods Sys Admin
- Subsidy
- RDS
- Rent Review
- Tenant Water Charges
- Land Water Rates
- Rent Support
- Basic Rents
- Revenue Accounts
- Revenue Accounts Sys Admin
- Fair Rents
- Rent Change
- Rents System Parameters

Admin Unit ? i ×

Profile Code *	Admin Unit *
<input type="text" value="Please Select"/>	<input type="text" value="Please Select"/>
Year	Start
<input type="text"/>	<input type="text"/>
End	Collection Weeks
<input type="text"/>	<input type="text"/>
Restricted	
<input type="checkbox"/>	

- Click 'More' and then Payment Profiles'
- Click 'Create' and then 'Create Payment Profile'



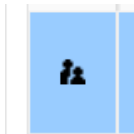
- Complete the 'Admin Unit' wizard remembering to have the correct number of collection weeks for each admin year.

The screenshot shows a web form titled "Create Payment Profile Items". The form contains the following fields and controls:

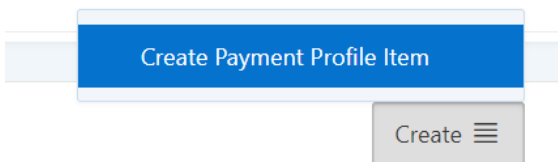
- Profile Code:** A text input field containing "DD01".
- Admin Unit Code:** A text input field containing "WEEKLY52HRH".
- Year:** A text input field containing "2024".
- Payment Due Date:** A date picker field with a calendar icon.
- Add Remainder:** A checkbox, currently unchecked.
- Debit Period Factor:** A text input field.
- Bal Effective Date:** A date picker field with a calendar icon.

At the bottom right of the form, there are three buttons: "Cancel", "Save", and "Apply".

- Click 'Save'
- 'Parent and Child' the new payment profile and open the 'Profile Items' section.



- Click 'Create' and then 'Create Payment Profile Item'

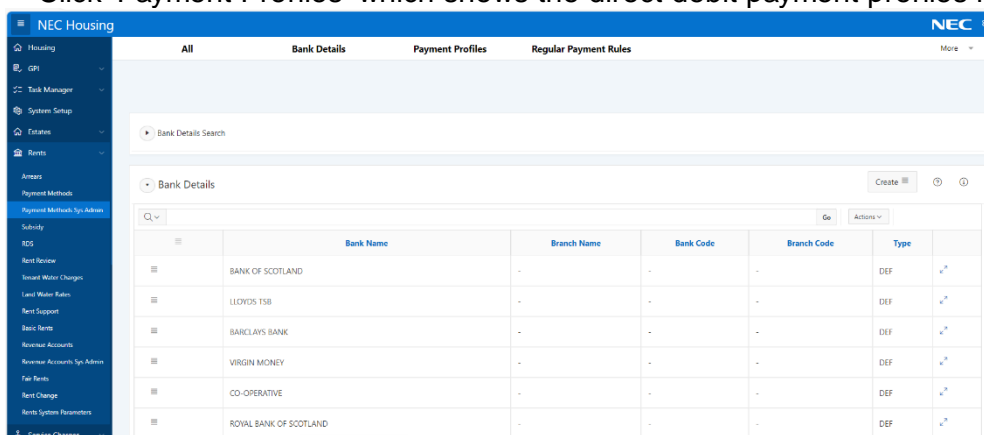


- Complete the 'Create Payment Profile Items' wizard for each of the payments due. Remember to tick 'Add Remainder' for the first payment of the year.
- Click 'Save'

4.2.11 Unassigning Direct Debit Profile

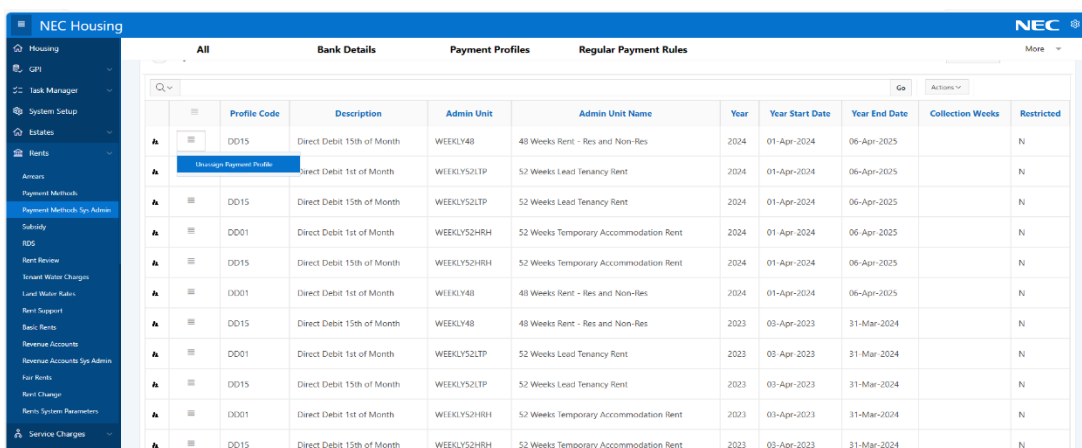
- From any page on the 'System Setup' modules navigation on the left-hand side find and select 'Rents'

- From here select 'Payments Methods Sys Admin'
- Click 'Payment Profiles' which shows the direct debit payment profiles for

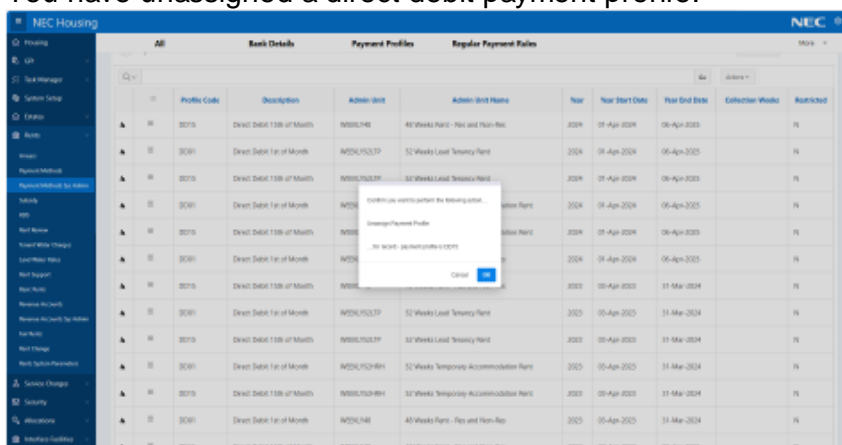


every admin year and rental admin unit.

- 'Row Action' the profile you would like to unassign and select 'Unassign Payment Profile'

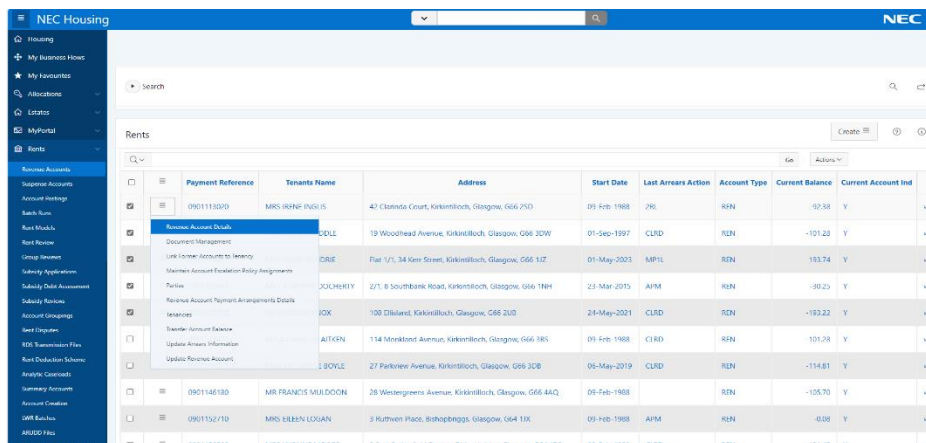


- Confirm you want to do the following action by checking you've chosen the correct payment profile and if you are happy clicking 'OK'
- You have unassigned a direct debit payment profile.

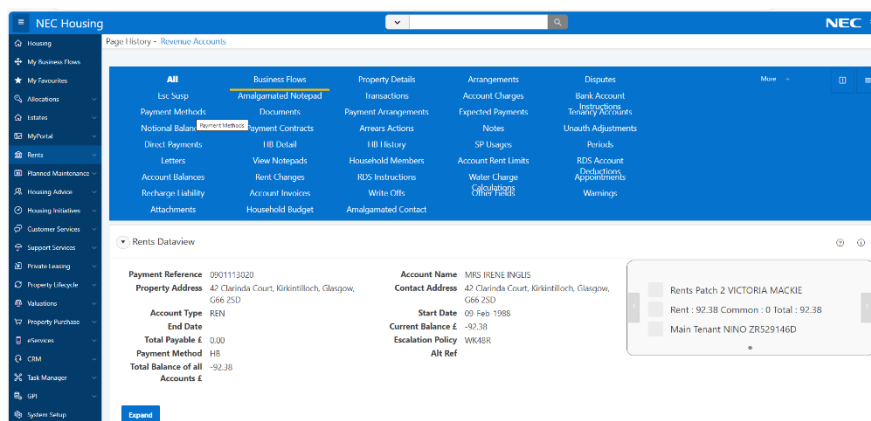


4.2.11.1 Updating Payment Profiles

You can only complete this task if the payment profile selected has a Code of DD (direct debit) and does not have an End Date.



- Click Housing.
The Housing menu expands.
- Click Rents.
The Rents menu expands.
- Click Revenue Accounts.
The Revenue Accounts page appears.
- Enter your search criteria in the Search area.
If the Quick Search options do not meet your needs, click the Advanced Search icon at the top of the Search area, and enter more specific criteria.



- Tip: Click the Help icon at the top of the form for further information.
- Click Search.
The records that meet your search criteria appear in the Rents region.
Do one of the following:
To select multiple records, check the boxes corresponding to the records you require, then select Revenue Account Details from the Bulk Actions list in the table heading.
To select a single record, select Revenue Account Details from the corresponding Row Action list.
The Rents Details page appears.
- Click the Payment Methods link at the top of the screen.
Tip: If this link is not visible at the top of the screen, click More to expand the menu.
The system scrolls down to the Payment Methods region.
- Select Update Payment Profile from the Row Action list corresponding to the record you want to update.
The Update Payment Profile form appears.
- Enter the relevant data in the form.
Tip:

- Click the Help icon at the top of the form for further information.
- Click Save.
 The form closes and you are returned to the Payment Methods region.
 The changes you made to the payment profile have been applied.

4.3 GPI Jobs

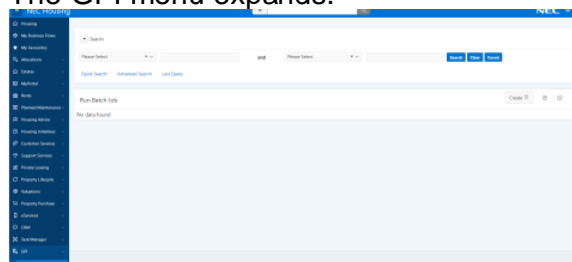
Generic Process Interface (GPI) allows you to run processes and reports to manage key interfaces that arise during the planning and execution of your organisation's day to day business processes.

Some reports and processes can be scheduled to run outside of your business hours, eliminating the possibility of any wasted time or resources. They can also be grouped and run together in batches. You can also determine whether a report or process depends on the successful completion of another job, and as a result, unnecessary jobs will not be initiated by the system.

Each report and process are run according to the run-time parameters that you specify, allowing you to tailor the jobs according to your requirements.

4.3.1 Run GPI Jobs – Basic Search

- Click GPI .
 The GPI menu expands.



- Click Run Job.
 The Run Batch Job page appears.
- Enter your search criteria in the Search area.
 If the Quick Search options do not meet your needs, click the Advanced Search icon at the top of the Search area, and enter more specific criteria.
 Tip: Click the Help icon at the top of the form for further information.
- Click Search.
 The recent jobs that meet your search criteria appear in the Run Batch Job region.
- Select Run Module from the Row Action list corresponding to the module you want to run a job for.
 The Run Module form appears.
- Enter the relevant data in the form.
 Tip:
 Click the Help icon at the top of the form for further information.

- Click Save.
A message box appears.
- Dismiss the message.
The form closes and you are returned to the Run Batch Job region.
The job will be run according to the parameters and options you have specified.

4.3.2 Run GPI Jobs – Advanced Search

- From any screen click 'GPI' and then 'Run Job'
- Click 'Advanced Search'
- Enter your search criteria and click 'Search'
- Row Action the job you are looking to run and select 'Run Module'
- Complete the wizard for the job you want to run
- Click 'Save'
You can use the % as a wild card like * in saffron.

4.3.3 Review GPI Job Output - Basic Search

- From any screen click 'GPI' and then 'Run Job'
- In the search bar select 'Module' and enter the module name in the search bar
- Click 'Search'
- Row Action the job you are looking to run and select 'Run Module'
- Complete the wizard for the job you want to run
- Click 'Save'

4.3.3.1 Viewing Job Run Output Files

- Click GPI
The GPI menu expands.
- Click Review GPI Job Output.

The screenshot shows a 'Job Schedule' interface. At the top, there is a search bar with a dropdown arrow and the word 'Search'. Below it, there are two search criteria fields: 'Restrict' with a dropdown arrow and the value 'Y', and 'and' with 'Please Select' and a dropdown arrow. To the right of these fields are three buttons: 'Search', 'Clear', and 'Count'. Below the search fields are three links: 'Quick Search', 'Advanced Search', and 'Last Query'. The main content area is titled 'Job Schedule' and has a 'Create' button with a dropdown arrow, a help icon, and an information icon. Below the title is a search bar with a dropdown arrow and the word 'Go', and an 'Actions' dropdown menu. The table below has the following columns: Run ID, Module, Description, Scheduled Date, Date Completed, Comments, Created By, and Status. The table contains three rows of data:

Run ID	Module	Description	Scheduled Date	Date Completed	Comments	Created By	Status
487978	EDC_SI_POSITION	EDC - Shortlist Reposition Script	18-SEP-2024 22:05:00	-	SCHEDULED	LBROWN	S
478244	HAT355	Allocations Batch Process Finished	18-SEP-2024 22:00:00	-	SCHEDULED	LBROWN	S
469848	HAT240	Short List Production (Fast Batch)	18-SEP-2024 20:30:00	-	SCHEDULED	LBROWN	S

- The Review GPI Job Output page appears.

- Enter your search criteria in the Search area.
If the Quick Search options do not meet your needs, click the Advanced Search icon at the top of the Search area, and enter more specific criteria.
Tip: Click the Help icon at the top of the form for further information.
- Click Search.
The records that meet your search criteria appear in the Job Schedule region.
- Select Job Details from the Row Action list corresponding to the record you want to view the details for.
The Job Details details page appears.
- Click the Output Files link at the top of the screen.
Tip: If this link is not visible at the top of the screen, click More to expand the menu.
The system scrolls down to the Output Files region.

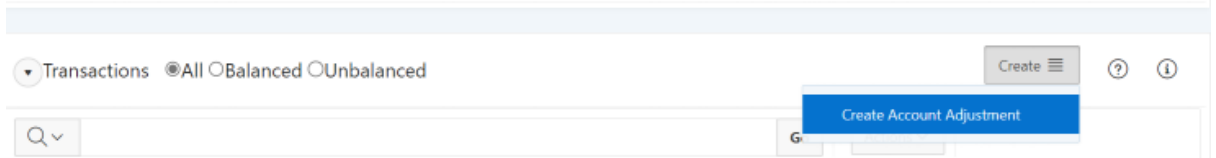
4.3.4 Review GPI Job Output - Advance Search

- Click GPI
The GPI menu expands.
- Click Review GPI Job Output.
The Review GPI Job Output page appears.
- Enter your search criteria in the Search area.
If the Quick Search options do not meet your needs, click the Advanced Search icon at the top of the Search area, and enter more specific criteria.
Tip: Click the Help icon at the top of the form for further information.
- Click Search.
The records that meet your search criteria appear in the Job Schedule region.
- Select Job Details from the Row Action list corresponding to the record you want to view the details for.
The Job Details details page appears.
- Click the Output Files link at the top of the screen.
Tip: If this link is not visible at the top of the screen, click More to expand the menu.

4.4 Finance Processes

4.4.1 Creating Manual Adjustments

- From any page on the 'Housing' modules navigation on the left-hand side find and select 'Rents' and then 'Revenue Accounts'
- Search for the account using the search or advanced search options
- Select the account you want to add the adjustment to
- Click 'More' and select 'Transactions'
- Click 'Create' and then 'Create Account Adjustment'

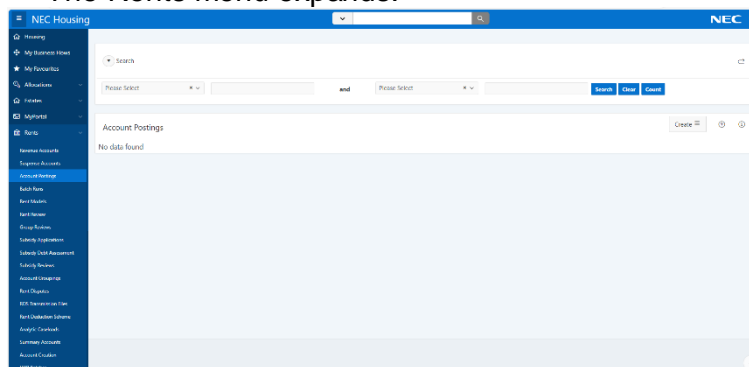


-
- Complete the 'Create Account Adjustment' wizard ensuring to select one of the manual adjustment types and input a debit or credit to add.

-
- Click 'Save'
- You have added a manual adjustment to a rent account.

4.4.3 Creating Account Postings

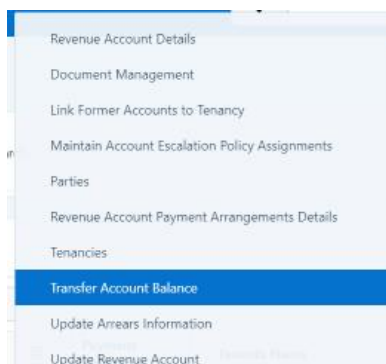
- Click Housing.
- The Housing menu expands.
- Click Rents.
- The Rents menu expands.



- If the Quick Search options do not meet your needs, click the Advanced Search icon at the top of the Search area, and enter more specific criteria.
- Tip: Click the Help icon at the top of the form for further information.
- Click Search.
- The records that meet your search criteria appear in the Account Postings region.
- Do one of the following:
 - To select multiple records, check the boxes corresponding to the records you require, then select Posting Details from the Bulk Actions list in the table heading.
 - To select a single record, select Posting Details from the corresponding Row Action list.
- The Posting Details page appears.
- Select Update Posting from the Row Action list corresponding to the record you want to update.
- The Update Postings form appears.
- Enter the relevant data in the form.
- Tip:
 - Click the Help icon at the top of the form for further information.
 - Click Save.
- The form closes and you are returned to the Postings region.
- The changes you made to the posting have been applied.

4.4.5 Moving Credit between Current and Former Accounts

- From any page on the 'Housing' modules navigation on the left-hand side find and select 'Rents' and then 'Revenue Accounts'
- Search for the account using the search or advanced search options
- Select the account you want to move the credit from
- 'Row Action' the rent account with the credit you want to move and click 'Transfer Account Balance'



- Complete the 'Transfer Account Balance' wizard ensuring to complete the payment reference the credit is to move to and if only a partial payment is due to be transferred complete that section.

-
- Click 'Save'
- You have been able to move credit between a current and former account.

4.4.6 Creating Write Offs

- From any page on the 'Housing' modules navigation on the left-hand side find and select 'Rents' and then 'Write Offs'
- Click 'Create' and then 'Create Write Offs'

- Complete the 'Create Write Offs' wizard ensuring to complete all required fields and click 'Save'

4.4.6 Updating Write Offs

- From any page on the 'Housing' modules navigation on the left-hand side find and select 'Rents' and then 'Write Offs'
- 'Row Action' the case that requires updating and click 'Update Write Off'

Write Offs

The screenshot shows a table with columns for checkboxes, menu icons, 'Reference', and 'Name'. A row with 'Reference' value '6' has a context menu open. The menu items are: Approve Write Off, Assign Batch Reference, Cancel Write Off, Origin Account Details, Person Details, Tenancy Details, and a blue 'Update Write Offs' button at the bottom.

- Complete the 'Update Write Offs' wizard with any changes that are required

The 'Update Write Offs' wizard form contains the following fields and values:

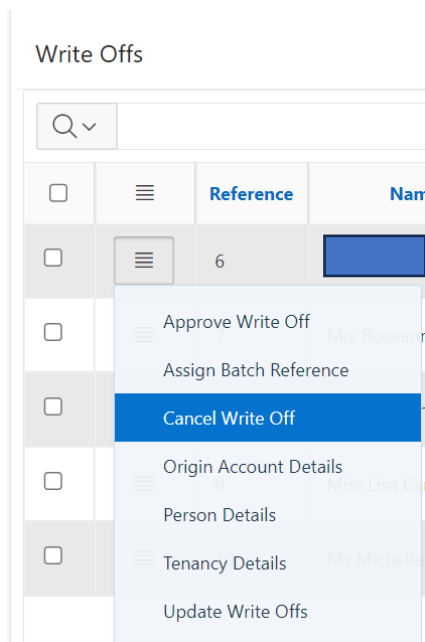
- Pay Ref ***: [Redacted]
- Person Ref ***: [Redacted]
- Amount ***: 770.97
- Reason Code ***: UNRE - Unrecoverable Unable To Trace
- Batch Ref**: Please Select
- Comments**: [Empty text area]

Buttons: Cancel, Save

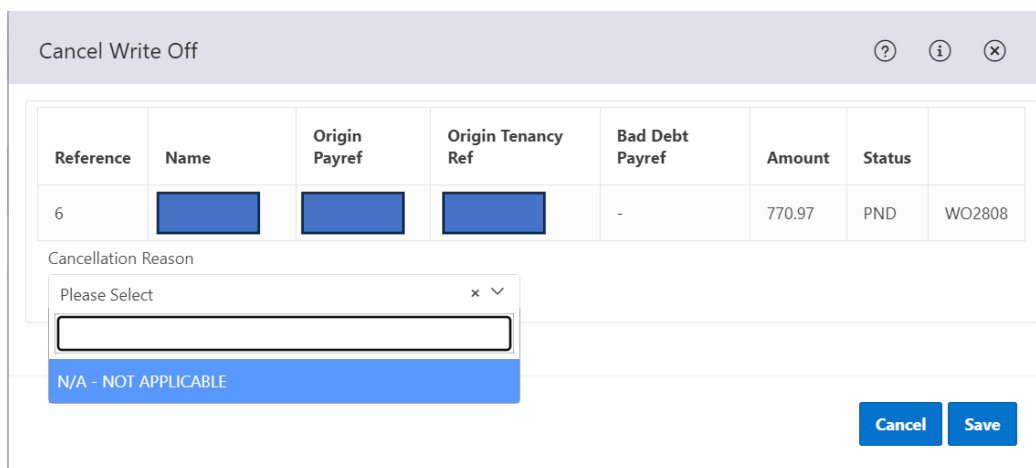
- Click 'Save'

4.4.6 Cancelling Write Offs

- From any page on the 'Housing' modules navigation on the left-hand side find and select 'Rents' and then 'Write Offs'
- 'Row Action' the case that requires updating and click 'Cancel Write Off'



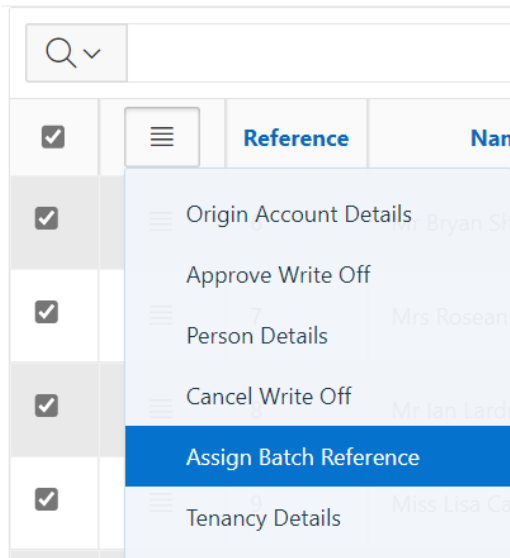
- Complete the 'Cancel Write Off' wizard ensuring to insert a cancellation reason.



4.4.6 Assigning Batch References to Write Offs for Authorisation

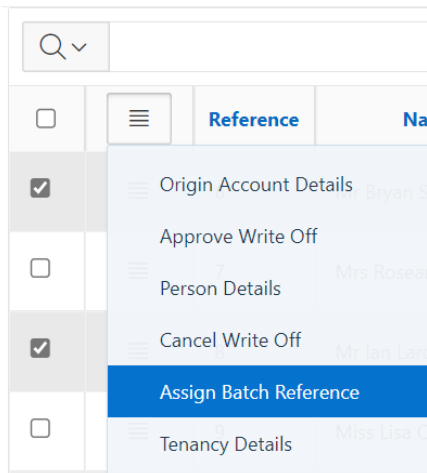
- From any page on the 'Housing' modules navigation on the left-hand side find and select 'Rents' and then 'Write Offs'
- Search for all pending write offs by selecting 'Status' for the search criteria and searching for 'PND'
- If all of the pending search results have been approved for authorisation tick the box in the header to select all and click 'Bulk Row Action' and then 'Assign Batch Reference'

Write Offs



- If selecting only some of the pending results tick the boxes against the cases due to be authorised and click 'Bulk Row Action' and then 'Assign Batch Reference'

Write Offs



- Complete the 'Assign Batch Reference' wizard ensuring to tick the 'Overwrite existing batch references' and entering the agreed 'Batch Reference'

Assign Batch Reference

?
i
x

Batch Reference

WO2808
▼

Update write offs at status Approved

Overwrite existing batch references

Update write offs at status Cancelled

Reference	Name	Origin Payref	Origin Tenancy Ref	Bad Debt Payref	Amount	Status	Batch Ref
6	Mr Bryan Shovlin	2901458580	32036	-	770.97	PND	WO2808
7	Mrs Roseanna Ritchie	0901464090	32568	-	142.86	PND	WO2808
8	Mr Ian Lardner	5901369291	32610	-	388.09	PND	WO2808
9	Miss Lisa Campbell	A901466981	33030	-	748.75	PND	WO2808
10	Ms Michelle Duffin	0901454370	36916	-	350.00	PND	WO2808

Cancel
Save

- Click 'Save'

4.4.6 Approving Write Offs

- From any page on the 'Housing' modules navigation on the left-hand side find and select 'Rents' and then 'Write Offs'
- Search for all approved write offs by doing an advanced search for the authorised batch reference and the status of 'Approved'

Write Offs Search ↶ ? ⓘ
✕

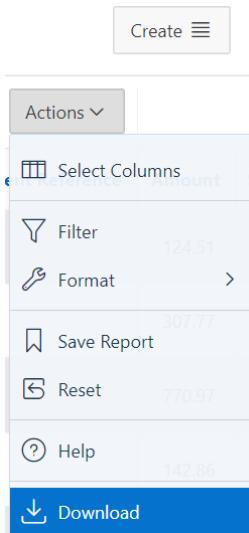
▼ Write Off details

Origin Payment Reference	<input type="text"/>	<input type="text"/>	Bad Debt Payment Reference	<input type="text"/>	<input type="text"/>
Origin Tenancy Reference	<input type="text"/>	<input type="text"/>	Batch Reference	<input type="text"/>	▼
Admin Unit	<input type="text"/>	<input type="text"/>	Account Type	Please Select	x ▼
Amount	<input type="text"/>	<input type="text"/>	Status	Approved	x ▼
Amount From	<input type="text"/>	<input type="text"/>	Amount To	<input type="text"/>	<input type="text"/>
Party Reference	<input type="text"/>	<input type="text"/>	Reason Code	Please Select	x ▼
Forename	<input type="text"/>	<input type="text"/>	Surname	<input type="text"/>	<input type="text"/>
Created Date From	<input type="text"/>	<input type="text"/>	Created Date To	<input type="text"/>	<input type="text"/>
Created By	<input type="text"/>	<input type="text"/>	Approved By	<input type="text"/>	<input type="text"/>
Approved Date From	<input type="text"/>	<input type="text"/>	Approved Date To	<input type="text"/>	<input type="text"/>

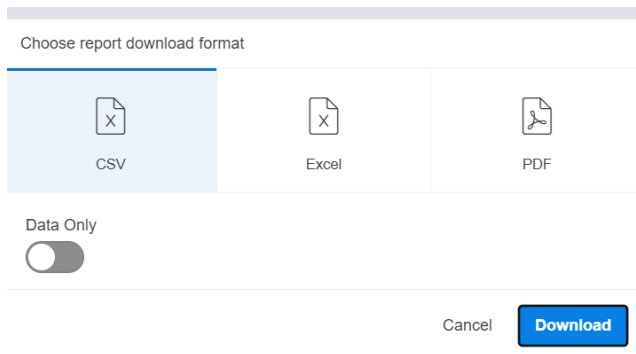
▶ Address details

Save and Search Save Search New Query Count Cancel

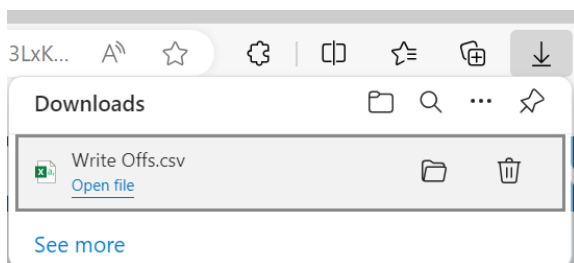
- In the search results click 'Actions' and then 'Download'



- Download using the 'Excel' format and click 'Downlaod'



- This downloads the file to your download folder



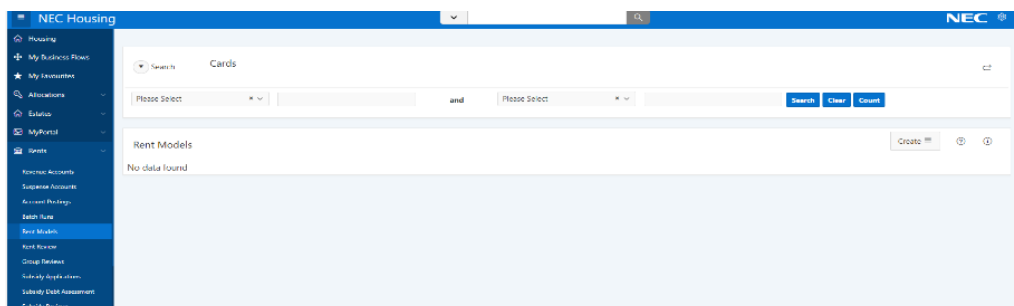
- Send this file to the finance shared mailbox (revenue.performance@eastdunbarton.gov.uk) populating the subject line with the Batch Reference and the following backup documents: List of all accounts including totals & Signed authorisation memo.

4.5 Rent Increase

A basic rent increase identifies how a basic rent amount should be determined for a new rent model.

4.5.1 Creating Basic Rent Increases

- Click Housing.
The Housing menu expands.
- Click Rents.
The Rents menu expands.
- Click Rent Models.



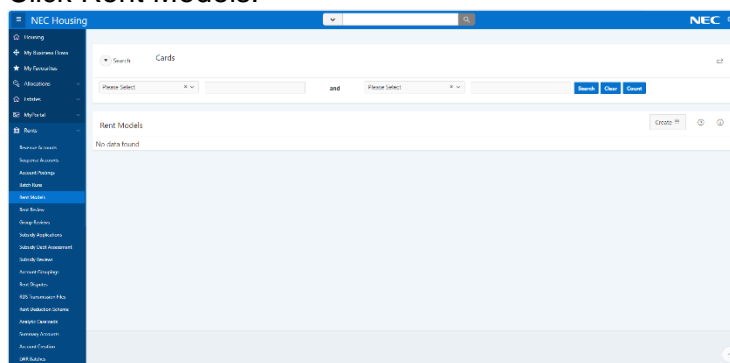
The Rent Models page appears.

- Enter your search criteria in the Search area.
If the Quick Search options do not meet your needs, click the Advanced Search icon at the top of the Search area, and enter more specific criteria.
Tip:
Click the Help icon at the top of the form for further information.

- Click Search.
 The records that meet your search criteria appear in the Rents Model region.
 Do one of the following:
 To select multiple records, check the boxes corresponding to the records you require, then select Rent Model Details from the Bulk Actions list in the table heading.
 To select a single record, select Rent Model Details from the corresponding Row Action list .
 The Rent Model Details page appears.
- Click the Basic Rent Increases link at the top of the screen.
 Tip:
 If this link is not visible at the top of the screen, click More to expand the menu.
 The system scrolls down to the Basic Rent Increases region.
- Select Create Basic Rent Increase from the Create list at the top of the region.
 The Create Basic Rent Increases form appears.
- Enter the relevant data in the form.
 Tip:
 Click the Help icon at the top of the form for further information.
- Click Save.
 The form closes and you are returned to the Basic Rent Increases region.
 The basic rent increase has been created.

4.5.2 Creating Property Rent Increases

- Click Housing.
 The Housing menu expands.
- Click Rents.
 The Rents menu expands.
- Click Rent Models.



The Rent Models page appears.

- Enter your search criteria in the Search area.
 If the Quick Search options do not meet your needs, click the Advanced Search icon at the top of the Search area, and enter more specific criteria.
 Tip:
 Click the Help icon at the top of the form for further information.
- Click Search.
 The records that meet your search criteria appear in the Rent region.
 Do one of the following:
 To select multiple records, check the boxes corresponding to the records you require, then select Rent Model Details from the Bulk Actions list in the table heading.

To select a single record, select Rent Model Details from the corresponding Row Action list.

The Rent Models Details page appears.

- Click the Basic Rent Increases link at the top of the page.
Tip:
If this link is not visible at the top of the screen, click More to expand the menu.
The system scrolls down to the Basic Rent Increases region.
- Click the Select this record icon in the row corresponding to the record you want to select.
The Property Rent Increases option appears below the Basic Rent Increases region.
- Click the Property Rent Increases Option Open icon.
The Property Rent Increases region opens.
- Select Create Property Rent Increases from the Create list at the top of the region.
The Create Property Rent Increase form appears.
- Enter the relevant data in the form.
Tip:
Click the Help icon at the top of the form for further information.
- Click Save.
The form closes and you are returned to the Property Rent Increases region.
The property rent increase has been created.

4.6 Arrears Actions

Arrears actions are used to record each event or stage of the recovery process for an individual account with an outstanding balance.

Before a user can record this information on the system, the relevant arrears actions must have been set up. For example:

- Letter 1 - First arrears letter.
- Letter 2 - After Letter 1 if the account falls further into arrears
- Telephone Call
- Visit

Actions can be linked to a master status, allowing an at-a-glance idea of the level of escalation that an account has reached.

Note:

The master statuses functionality is not mandatory.

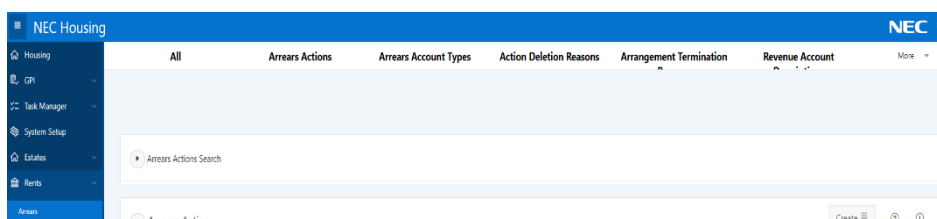
Any action that could take place at any point within the life cycle of an account in arrears, such as Telephone Call or visit, should be defined with an Arrears Action Type of INFO. This type of action is then ignored by the system during arrears escalation and will enable further arrears actions to be progressed to as defined by the policy.

You do this from the Arrears Actions region on the Rents system setup Arrears page.

Tip: When users are creating arrears actions, the Code is a required field.

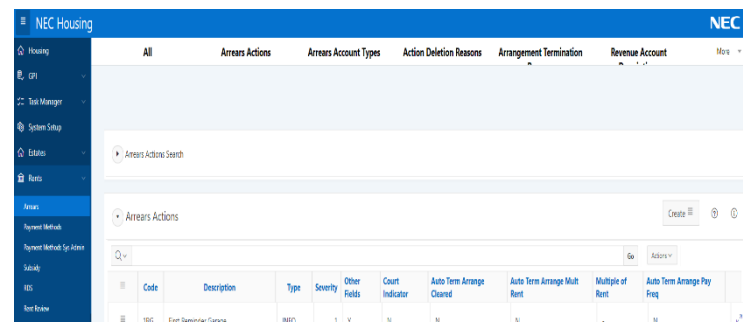
4.6.1 Creating Arrears Actions

- Click System Setup.
The System Setup area appears with the default product area displayed.
- Click Rents
The Rents menu expands.
- Click Arrears.



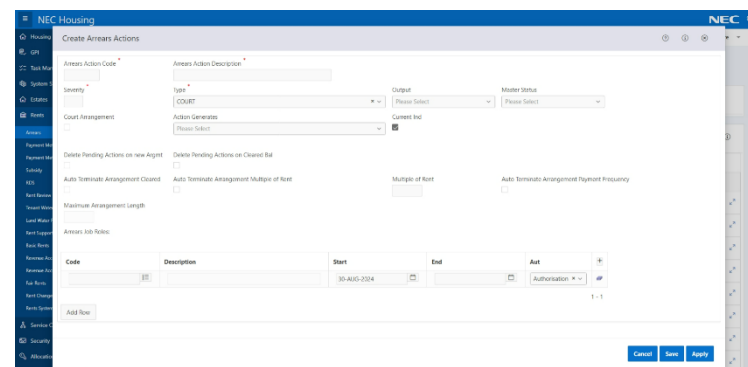
The Arrears setup page appears.

- Click the Arrears Actions link at the top of the setup page.
Tip: If the link isn't visible at the top of the screen, click More to expand the menu.



The page refreshes to display the selected region.

- Select Create Arrears Action from the Create list at the top of the region.
The Create Arrears Actions form appears.
- Enter the relevant data in the form.

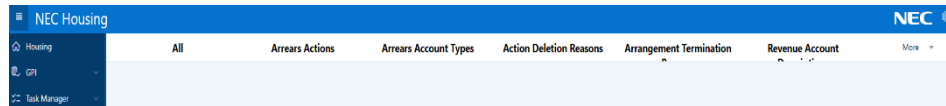


Tip: Click the Help icon at the top of the form for further information.

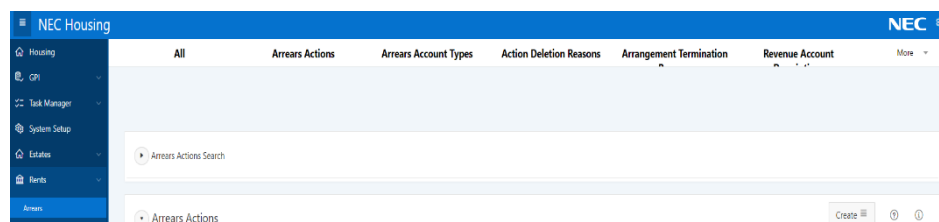
- Click Save.
The new arrears action appears in the Arrears Actions region.
The arrears action is now available to use elsewhere in the system.

4.6.2 Updating Arrears Actions

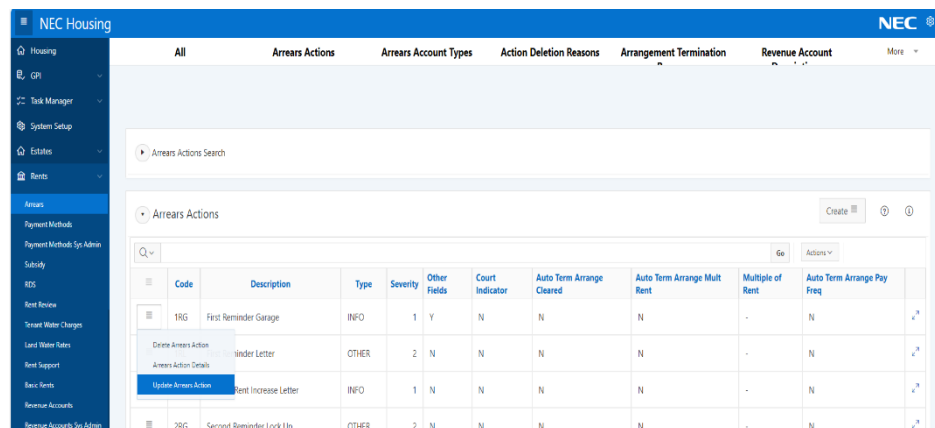
- Click System Setup.
The System Setup area appears with the default product area displayed.
- Click Rents
The Rents menu expands.
- Click Arrears.



The Arrears setup page appears.

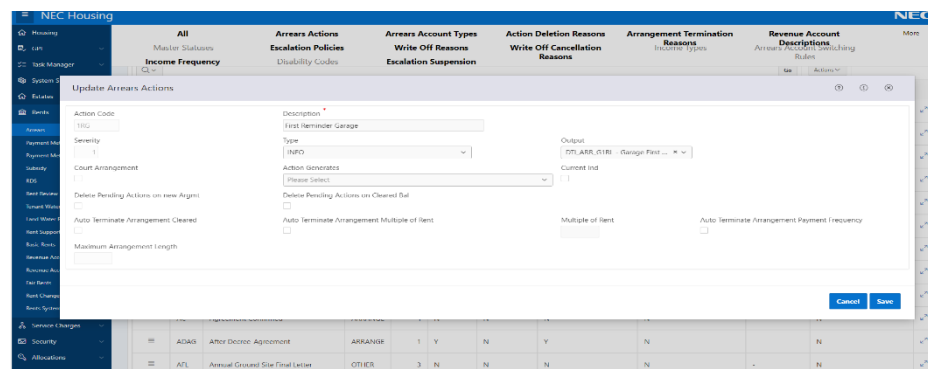


- Click the Arrears Actions link at the top of the setup page.
Tip: If the link isn't visible at the top of the screen, click More to expand the menu.



The page refreshes to display the selected region.

- Select Update Arrears Action from the Row Action list corresponding to the



appropriate record.

The Update Arrears Actions form appears.

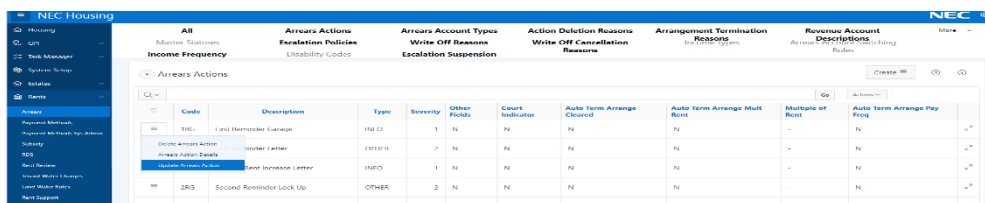
- Enter the relevant data in the form.

Tip: Click the Help icon at the top of the form for further information.

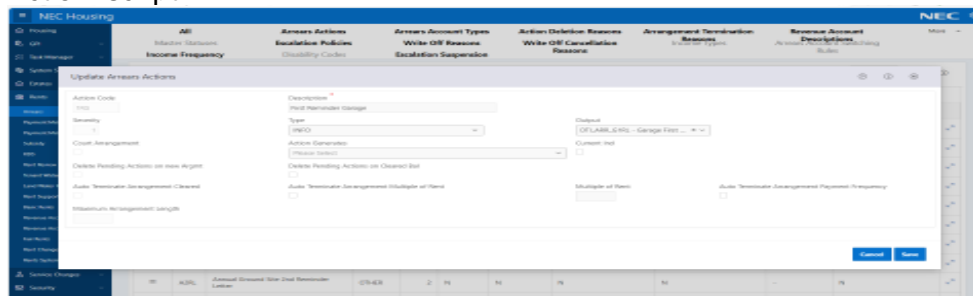
- Click Save.
 The form closes and you are returned to the Arrears Actions region.
 The changes you made to the arrears action have been applied.

4.6.3 Applying Security to Arrears Actions

- From any page on the 'System Setup' modules navigation on the left-hand side find and select 'Rents' and then 'Arrears'
- In the 'More' drop down select 'Arrears Actions'
- Search for the arrears action you'd like to update using the search bar
- 'Row Action' the arrears action and click 'Update Arrears Action'



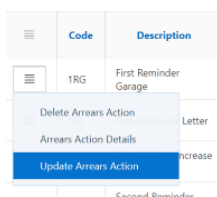
- Complete the 'Update Arrears Actions' wizard ensuring to complete the mandatory fields and any additional fields the same as in the 'Create Arrears Action' script.



- Click 'Save'
- You cannot update the security for arrears actions in this set. Follow the script for 'Applying Security to Arrears Actions' for that step.
 You have been able to update an arrears action.

4.6.4 Making Arrears Actions Non-Current

- From any page on the 'System Setup' modules navigation on the left-hand side find and select 'Rents' and then 'Arrears'
- In the 'More' drop down select 'Arrears Actions'
- Search for the arrears action you'd like to update using the search bar
- 'Row Action' the arrears action and click 'Update Arrears Action'



- Complete the 'Update Arrears Actions' wizard ensuring to untick the 'Current Ind'

-
- Click 'Save'
- You have made an arrears action non-current

4.7 Arrears Escalations

Arrears stages are used for monitoring purposes. Against each arrears stage, the target number of days normally allowed for the account to be at this stage before further action is taken can be defined.

For example, a service level agreement may exist with the local courts such that court hearing date notifications are to be received within two weeks of an application being made.

There is a facility to monitor accounts that have an incomplete arrears stage, using the Revenue Account Search form, Arrears Details area.

Note: Actions of type INFO may also be used as either the start or end action of an arrears stage.

4.7.1 Creating Escalations

- Click System Setup.
The System Setup area appears with the default product area displayed.
- Click Rents
The Rents menu expands.
- Click Arrears.
The Arrears setup page appears.
- Click the Escalation Policies link at the top of the setup page.

Tip: If the link isn't visible at the top of the screen, click More to expand the menu.

The page refreshes to display the selected region.

- Select Escalation Policy Details from the Row Action list corresponding to the appropriate record.
The Escalation Policy Details page appears.
- Click Arrears Stages link at the top of the details page.
Tip: If the link isn't visible at the top of the screen, click More to expand the menu.
The page refreshes to display the selected region.
- Select Create Arrears Stages from the Create list at the top of the region.

- The Create Arrears Stages form appears.
- Enter the relevant data in the form.
Tip: Click the Help icon at the top of the form for further information.
- Click Save.
The new escalation policy arrears stage appears in the Arrears Stages region.
The escalation policy arrears stage is now available to use elsewhere in the system.

4.7.2 Updating Escalations

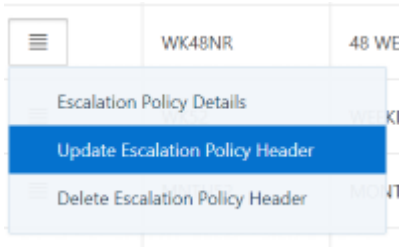
- Click System Setup.
The System Setup area appears with the default product area displayed.
- Click Rents
The Rents menu expands.
- Click Arrears.
The Arrears setup page appears.
- Click the Escalation Policies link at the top of the setup page.
Tip: If the link isn't visible at the top of the screen, click More to expand the menu.
The page refreshes to display the selected region.
- Select Escalation Policy Details from the Row Action list corresponding to the appropriate record.

Code	Description	Type	Severity	Other Fields	Court Indicator	Auto Term Arrange Cleared	Auto Term Arrange Rent	Auto Term Arrange Mult	Multiple of Rent	Auto Term Arrange Pay Freq
1BG	First Reminder Garage	INFO	1	N	N	N	N	N	-	N
1RL	First Reminder Letter	OTHER	2	N	N	N	N	N	-	N
1UCR	First UC Rent Increase Letter	INFO	1	N	N	N	N	N	-	N
2RG	Second Reminder Lock Up	OTHER	2	N	N	N	N	N	-	N
2RL	Second Reminder Letter	OTHER	3	N	N	N	N	N	-	N
2UCR	Second UC Rent Increase Letter	INFO	1	N	N	N	N	N	-	N
7PL	Sevens Day Pre Legal Letter	INFO	8	N	N	N	N	N	-	N
A1RL	Annual Ground Site First Reminder Letter	OTHER	1	N	N	N	N	N	-	N

- The Escalation Policy Details page appears.
- Click Arrears Stages link at the top of the details page.
Tip: If the link isn't visible at the top of the screen, click More to expand the menu.
The page refreshes to display the selected region.
- Select Update Arrears Stages from the Row Action list corresponding to the appropriate record.
The Update Arrears Stages form appears.
- Enter the relevant data in the form.
Tip: Click the Help icon at the top of the form for further information.
- Click Save.
The form closes and you are returned to the Arrears Stages region.
The changes you made to the escalation policy arrears stage have been applied.

4.7.3 Making Escalations Non-Current

- From any page on the 'System Setup' modules navigation on the left-hand side find and select 'Rents' and then 'Arrears'
- In the 'More' drop down select 'Escalation Policies'
- 'Row Action' the escalation policy you want to update and click 'Update Escalation Policy Header'



-
- Complete the 'Update Escalation Policy Header' wizard ensuring to untick the 'Current Indicator'

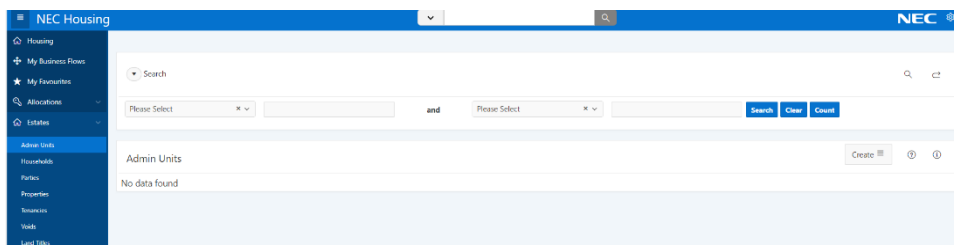
-
- Click 'Save'
- You have made an escalation policy non-current.

4.8 Admin Units

Administration units are used to group properties within NEC Housing to exercise financial controls, produce reports and limit user access.

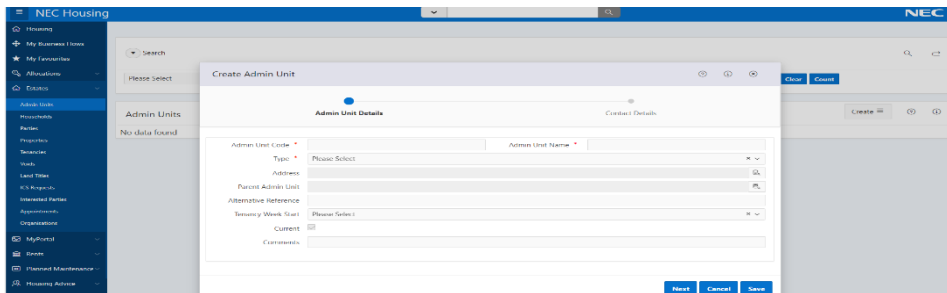
4.8.1 Creating New Admin Units

- Click Housing Icon Housing.
- Click Estates.
- Click Admin Unit.



- Select Create Admin Unit from the Create list at the top of the region.

- Enter the relevant data in the wizard:
ADMIN UNIT CODE, ADMIN UNIT NAME, TYPE
 Address, Parent Admin Unit, Alternative Reference, Tenancy Week Start, Current, Comment



- Click Save.

4.8.2 Updating Admin Units

- Click Housing Icon
- click on estates
- click on admin units
- search for the admin units using the quick search or advance search
- row action the admin unit you want to change on the page
- click on update admin unit from the drop down
- fill in the wizard with the changes e.g. description change
- click save

4.9 Admin Years

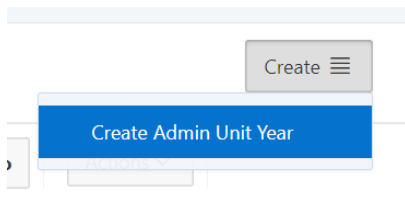
Admin years are used to record both the start and end dates of a financial year corresponding to a particular admin unit.

4.9.1 Creating New Admin Years

- From 'System Setup' click 'Rents' and then 'Revenue Accounts System Admin'



- Click 'Create' and then 'Create Admin Unit Year'



- Complete the 'Create Admin Year' - When you select your admin unit it automatically completes most of the wizard but make sure that the details are correct, and the number of admin weeks are correct for the year.

The 'Create Admin Year' form contains the following fields and options:

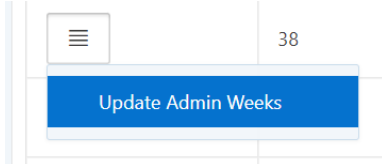
- Admin Unit**: A dropdown menu with 'Please Select' as the current selection.
- Start Date**: A date input field.
- End Date**: A date input field with a calendar icon.
- Admin Year**: A text input field.
- Debit Basis**: A dropdown menu with 'Please Select' as the current selection.
- Force Period**:
- Remove Limits**:
- Pro-Rate**:
- Weeks in Year**: A text input field.
- Week Start Day**: A text input field.
- Month Start Day**: A text input field.
- Days in Month**: A text input field.
- Inflation Rate**: A text input field.
- First Balance Period**: A text input field.
- First Debit Period**: A text input field.
- Create Balance Periods**:
 - Monthly
 - Four Weekly
 - Two Weekly
 - Weekly
- Balance Effective Day**: A dropdown menu with 'SUN' as the current selection.
- Create Debit Periods**:
 - Monthly
 - Four Weekly
 - Two Weekly
 - Weekly
- Create Admin Weeks**:
- Number of Admin Weeks**: A text input field.

Cancel Save Apply

- Click 'Save'
- 'Parent and Child' the new admin year and open the 'Admin Weeks' drop down.



- Find the rent-free weeks for that year and 'Row Action' those and select 'Update Admin Weeks'



- Complete the 'Update Admin Weeks' wizard by ticking the rent-free box

Update Admin Weeks ? ⓘ ✕

Rent Free *

Cancel Save

- Click 'Save'
- Good practice to check all the options in parent and child to make sure they are sitting correctly before the admin year needs activating.

4.9.2 Activating New Admin Years

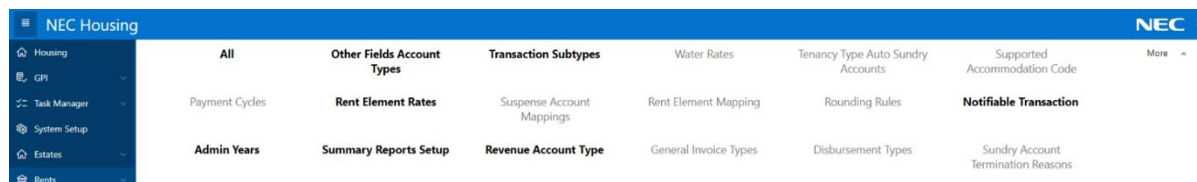
- Click System Setup Icon System Setup.
The System Setup area appears with the default product area displayed.
- Click Rents
The Rents menu expands
- Click Revenue Accounts.

Code	Description	Other Fields
HBO	HOUSING BENEFIT OVERPAYMENT (update)	Y
MWO	MAJOR WORKS ACCOUNT	N
REN	RENT ACCOUNT	Y
REP	RECHARGEABLE REPAIRS ACCOUNT	N

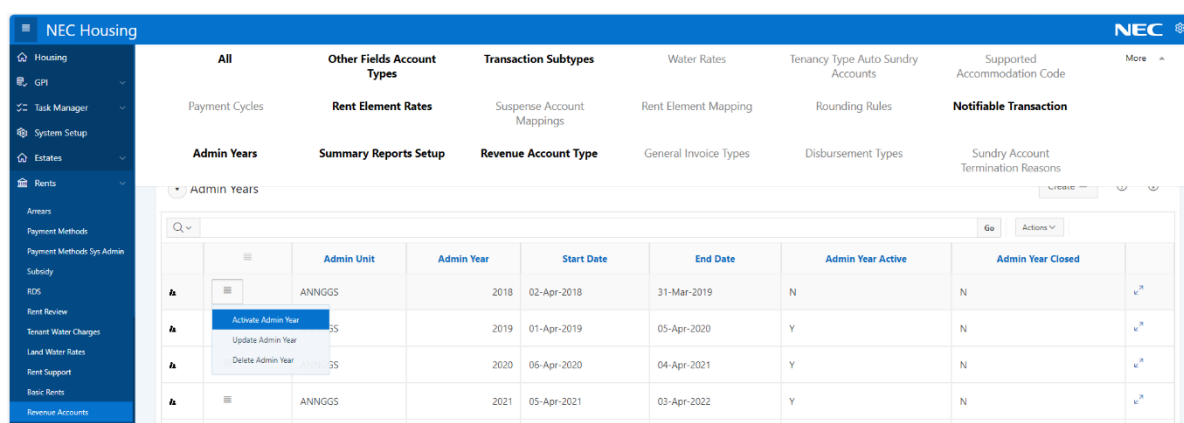
The Revenue Accounts setup page appears.

Click More

- Click the Admin Years link at the top of the setup page.
 Tip: If the link isn't visible at the top of the screen, click More to expand the menu. The page refreshes to display the selected region.
- Select Activate Admin Year from the Row Action list corresponding to the appropriate record.



The Activate Admin Year form appears.

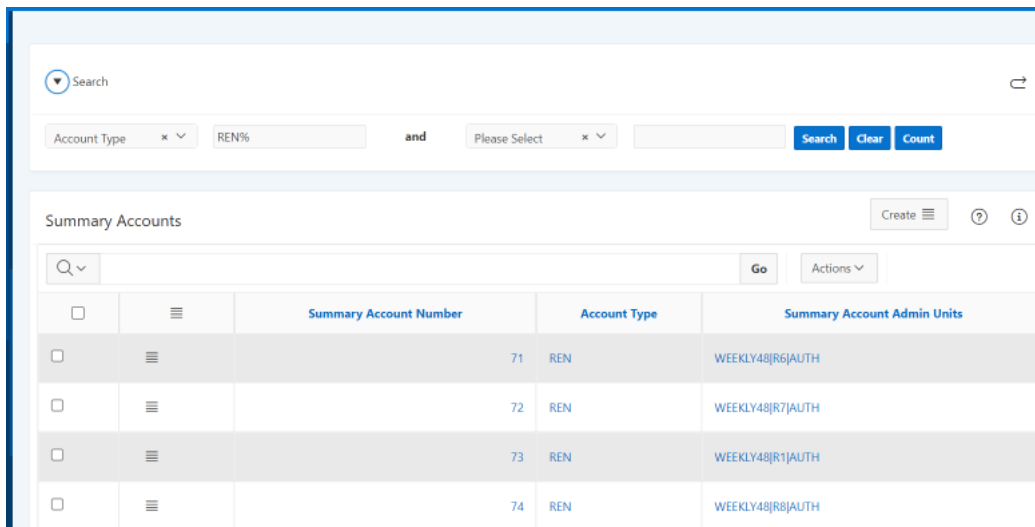


- Enter the relevant data in the form.
 Tip:
 Click the Help icon at the top of the form for further information.
- Click Save.
 The form closes and you are returned to the Admin Years region.
 The admin unit year is now active in the system.

4.10 Summary Reports

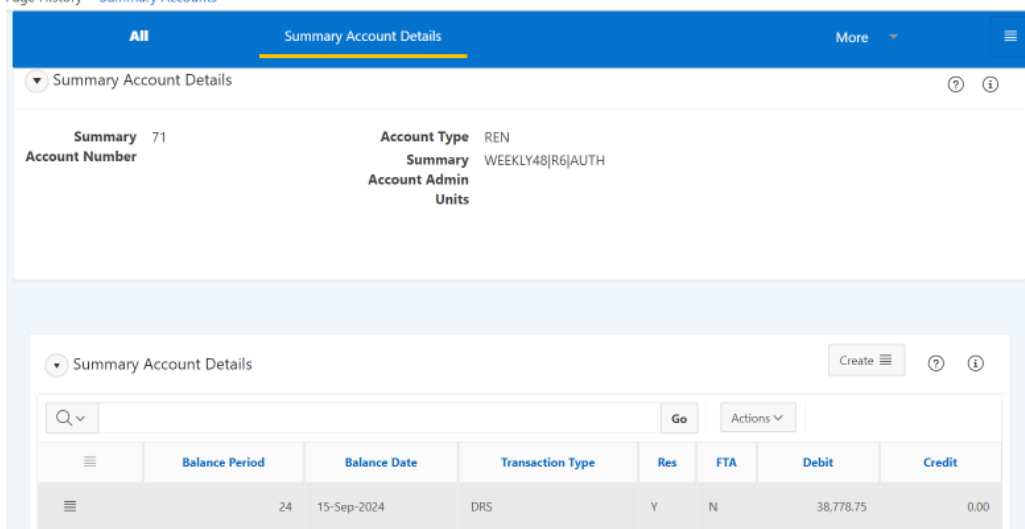
4.10.1 Viewing Summary Reports

- From any page on the 'Housing' modules navigation on the left-hand side find and select 'Rents' and then 'Summary Accounts'
- Use the search bar to search by either the Summary Account Number, Account Type or Summary Account Admin Units



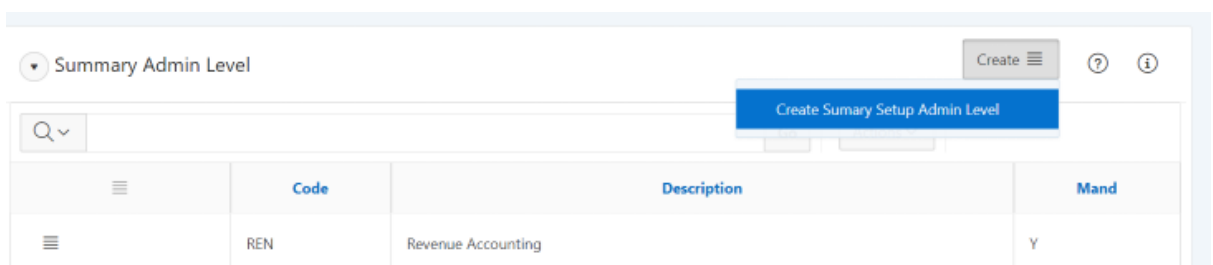
- Once you've completed the search click on the account you'd like to view
- This opens the Summary Account Details page
- The wild card doesn't work for the search bar. You must enter the account number or use part of the search criteria and then the wild card. For example, 'REN%' for the Account Type or 'Weekly%' for the Summary Account Admin Units
- You have been able to view summary accounts

Page History - Summary Accounts



4.10.2 Creating Summary Reports

- From any page on the 'System Setup' modules navigation on the left-hand side find and select 'Rents' and then 'Revenue Accounts'
- In the 'More' drop down select 'Summary Reports Setup'
- 'Parent and Child' the summary report you'd like to create a level for
- Open the Summary Admin Level drop down
- Click 'Create' and then 'Create Summary Setup Admin Level'



- Complete the 'Create Summary Setup Admin Level' wizard by selecting the 'Admin Unit Type Code' from the search dialog

Admin Unit Type Code	Admin Unit Type Description	Mandatory	+
		<input checked="" type="checkbox"/>	

1 - 1

Add Row

Cancel Save Apply

- To add more admin unit type codes, click 'Add Row' and select the 'Admin Unit Type Code' from the search dialog.
- Once you have added all the summary setup admin levels click 'Save'
- You have been able to create summary reports

4.10.3 Updating Summary Reporting Levels

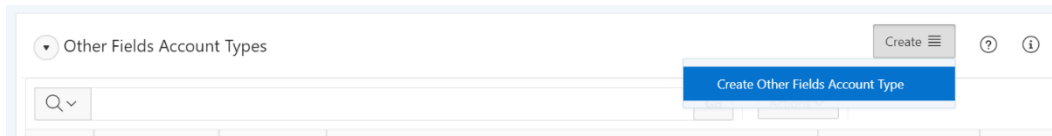
- From any page on the 'System Setup' modules navigation on the left-hand side find and select 'Rents' and then 'Revenue Accounts'
- In the 'More' drop down select 'Summary Reports Setup'
- 'Parent and Child' the summary report you'd like to add reporting levels to
- Open the Summary Admin Level drop down
- Click 'Create' and then 'Create Summary Setup Admin Level'
- Complete the 'Create Summary Setup Admin Level' wizard by using the search dialog to select the 'Admin Unit Type Code'
- To add more admin unit type codes, click 'Add Row' and select the 'Admin Unit Type Code' from the search dialog.
- Once all the levels have been added click 'Save'
- You have been able to update or delete a summary reports level.

4.11 Other Fields

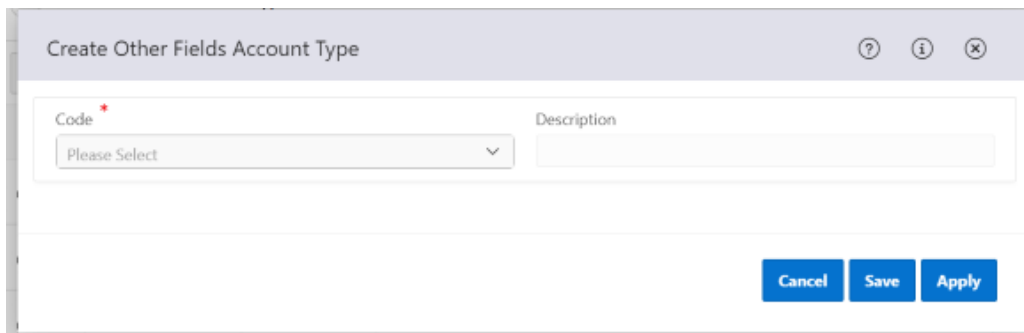
4.11.1 Attaching Other Fields to the Rent Accounts

- From any page on the 'System Setup' modules navigation on the left-hand side find and select 'Rents' and then 'Revenue Accounts'
- In the 'More' drop down select 'Other Fields Account Types'
- 'Parent and Child' the Rent Account and open the 'Other Field Usages' drop down

- Click 'Create' and then 'Create Other Field Usages'



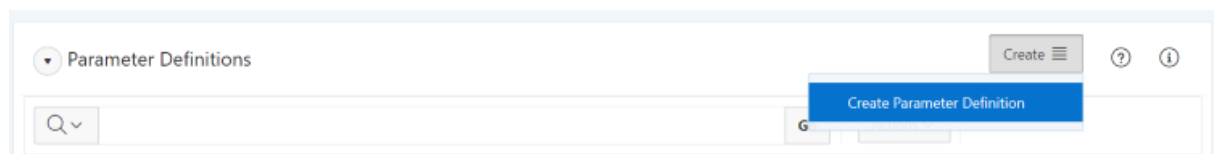
-
- 'Complete the "Create Other Field Usages" wizard ensuring to complete the following
 - Parameter Name - The name of the other field you created
 - Display Sequence - The order this is to appear on the rent account
 - Required - tick this only if it is a required field which has to be completed.'



- Click 'Save'
- You have been able to attach other fields to the rent account.

4.11.2 Creating 'Other Fields'

- From any page on the 'System Setup' modules navigation on the left-hand side find and select 'General' and then 'Parameters'
- In the 'More' drop down select 'Parameter Definitions'
- Click 'Create' and then 'Create Parameter Definition'



- - Description
 - Type - This should always be "Other Fields"
 - Datatype - What you want to enter in the other fields box, it can be either.
- Coded - Drop down options of prewritten inputs
- Date - A date input
- Numeric - A number input
- Sort -
- Text - A free text input

- YN - A yes or no input
 - Required - If this is a required field
 - Updateable - Should always have a tick
 - Hidden - Should always be unticked
 - Length - The number of characters for free text
 - Decimal Places - the number of decimal places for numeric
 - Wildcards - Should always be unticked
 - Lower Case - If the text should appear lower case
 - Validation Rule - This is the drop down for the coded data type
 - Default Value - Should always be blank
 - Hint Text - Hints for someone completing the other field. Likely to be left blank
 - Query Module - Search option - to be left blank'

The screenshot shows a 'Parameter Definition' window with the following fields and options:

- Name *
- Description *
- Type: OTHER FIELDS (dropdown)
- Datatype *: TEXT (dropdown)
- Required:
- Updateable:
- Hidden:
- Length *
- Decimal Places
- Wildcards:
- Lower Case:
- Validation Rule: Please Select (dropdown)
- Validation Rule Description
- Rule Parameters
- Default Value
- Hint Text

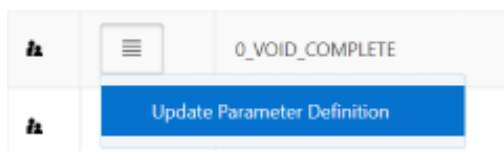
Buttons: Cancel, Save

- Once you have completed the necessary information click 'Save'
- For the coded data type, you must first create validation rules and reference domains. Please follow the 'Creating Validation Rules and Reference Domains' guide for this.
- You have been able to create another fields parameter.

4.11.2 Updating or Removing 'Other Fields'

- From any page on the 'System Setup' modules navigation on the left-hand side find and select 'General' and then 'Parameters'
- In the 'More' drop down select 'Parameter Definitions'
- Search for the parameter you'd like to update or delete

- To update an other field 'Row Action' the parameter and click 'Update Parameter Definition'



-
- Complete the 'Update Parameter Definition' ensuring to complete any necessary fields and if the parameter is no longer in use untick the 'Current' tick box.

The image shows a dialog box titled 'Update Parameter Definition'. It contains the following fields and controls:

- Name: 0_VOID_COMPLETE
- Description: Void Complete
- Type: MODULE
- Datatype: YN
- Required:
- Updateable:
- Hidden:
- Current:
- Length: [Empty text box]
- Decimal Places: [Empty text box]
- Wildcards:
- Lower Case:
- Validation Rule: Please Select
- Rule Parameters: [Empty text box]
- Default Value: [Empty text box]

Buttons: Cancel, Save

-
- Click 'Save'
- To delete an other field 'Row Action' the parameter and click 'Delete Parameter Definition'
- This opens a box asking you to confirm the action. If you are happy that the details are correct click 'Ok'
- You cannot delete an other field that is attached to any parts of the system, so the other field needs unattached first. You can do this by following the 'Updating Other Fields Attached to Rent Accounts' or 'Updating Other Fields Attached to Arrears Actions' guides.
- You have been able to update or delete an other field.

4.11.3 Updating Other Fields Attached to Rent Accounts

- From any page on the 'System Setup' modules navigation on the left-hand side find and select 'Rents' and then 'Revenue Accounts'
- In the 'More' drop down select 'Other Fields Account Types'
- 'Parent and Child' the Rent Account and open the 'Other Field Usages' drop down

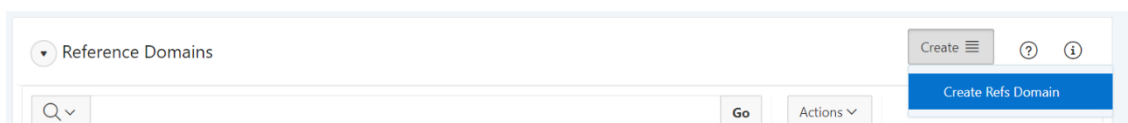
- To delete an other field from the rent account ‘Row Action’ the field you’d like to delete and select ‘Delete Other Field Usage’
- Complete the ‘Delete Other Field Usage’ wizard by checking the details are correct and clicking ‘Save’
- To update an other field from the rent account ‘Row Action’ the field and select ‘Update Other Field Usage’
- Complete the ‘Update Other Field Usage’ wizard with the necessary changes
- Click ‘Save’
- You have been able to update the other fields attached to rent accounts

4.11.4 Updating Other Fields Attached to Arrears Actions

- From any page on the ‘System Setup’ modules navigation on the left-hand side find and select ‘Rents’ and then ‘Arrears’
- In the ‘More’ drop down select ‘Arrears Actions’
- ‘Row Action’ the arrears action you want to update and click ‘Arrears Action Details’
- In the ‘Arrears Action Dataview’ click on the ‘More’ drop down and select ‘Other Field Usages’
- To delete an other field from the rent account ‘Row Action’ the field you’d like to delete and select ‘Delete Other Field Usage’
- Complete the ‘Delete Other Field Usage’ wizard by checking the details are correct and clicking ‘Save’
- To update an other field from the rent account ‘Row Action’ the field and select ‘Update Other Field Usage’
- Complete the ‘Update Other Field Usage’ wizard with the necessary changes
- Click ‘Save’
- You have been able to update other fields attached to arrears actions

4.11.5 Creating Validation Rules and Reference Domains

- From any page on the ‘System Setup’ modules navigation on the left-hand side find and select ‘General’ and then ‘Parameters’
- In the ‘More’ drop down select ‘Reference Domains’
- Click ‘Create’ and then ‘Create Refs Domain’



-
- ‘Complete the ‘‘Create Ref Domain’’ wizard ensuring to complete the following
 - Code - The code for the domain
 - Description - Description of the domain

- Length - Number of characters for this
- Product Area - Should always be HOU - Housing Domains
- Type - Leave blank'

- Once complete click 'Save'
- 'Parent and Child' the new domain and open the 'Reference Values' drop down.
- Click 'Create' and then 'Create Refs Value'

-
- 'Complete the "Create Ref Value" wizard ensuring to complete the following
 - Code - the code for this drop-down option
 - Description - The description for this down drop option
 - Code2 - Leave blank
 - Description2 - Leave blank
 - Sequence - The order in which you want it to show in the drop down. Can be left blank unless a particular order is needed
 - Default - The default option for the drop down - Can be left blank
 - Current - If it's a current option
 - Comments - Can be left blank'

- Once complete click 'Save' and repeat this for every drop-down option required.
- In the 'More' drop down select 'Validation Rules'
- Click 'Create' and then 'Create Validation Rule'

-
- 'Complete the "Create Validation Rule" wizard ensuring to complete the following
 - Name - This can be the same as the Reference Value
 - Type - Should always be "Ref Value"
 - Description - This can be the same as the reference Value

- Error Number - Leave Blank

The screenshot shows a 'Create Validation Rule' wizard with the following steps: Validation Rule, Table List of Values, Sql Details, Reference List of Values, Date Rule, and Number Rule. The 'Validation Rule' step is selected. The form contains the following fields:

- Name: [Text Input]
- Type: [Dropdown Menu: DATE]
- Description: [Text Input]
- Error Number: [Dropdown Menu: Please Select]
- Error Name: [Text Input]

Buttons: Next, Cancel

- Once you have completed the first page of the 'Create Validation Rule' click 'Next'
- In the second page you are only required to complete the 'Reference Domain'. You do this by searching for the reference domain you created.
- Once complete click 'Save'
- This is the first step required for creating other fields with a drop down. Once you have completed this step, please follow the 'Creating Other Fields' guide.
- You have been able to create the drop-down options for the other fields.

4.11.6 Updating or Deleting Validation Rules

- From any page on the 'System Setup' modules navigation on the left-hand side find and select 'General' and then 'Parameters'
- In the 'More' drop down select 'Validation Rules'
- Search for the validation rule you'd like to update or delete
- To delete a validation rule 'Row Action' the validation rule and select 'Delete Validation Rule'
- This opens a box asking you to confirm the action. If you are happy that the details are correct click 'Ok'
- To update a validation rule 'Row Action' the validation rule and select 'Update Validation Rule'
- Complete the 'Update Validation Rule' wizard updating anything that requires it and if the domain reference is no longer in use untick the 'Current' tick box.
- Click 'Save'
- You cannot delete the Validation Rule if it is attached to any part of the system. You will need to remove all links to this before deleting. You can however make it not current without unattaching it to everything.

- You have been able to update or delete validation rules.
-

4.11.7 Updating or Deleting Reference Domains

- From any page on the 'System Setup' modules navigation on the left-hand side find and select 'General' and then 'Parameters'
- In the 'More' drop down select 'Reference Domains'
- Search for the reference domain you'd like to update or delete
- To delete the reference domain 'Row Action' the parameter and click 'Delete Refs Domain'
- This opens a box asking you to confirm the action. If you are happy that the details are correct click 'Ok'
- To update the reference domain 'Row Action' the reference domain and click 'Update Refs Domain'
- Complete the 'Update Ref Domain' wizard updating anything that requires it and if the domain reference is no longer in use untick the 'Current' tick box.
- To update the reference domain values 'Parent and Child' the parameter and open the 'Reference Values' drop down.
- 'Row Action' the value needing updated and select 'Update Ref Value'
- Complete the 'Update Ref Value' wizard ensuring to update anything that is required and unticking the 'Current' tick box if no longer required.
- Click 'Save'
- You cannot delete the reference domain if it is attached to any part of the system. You will need to remove all links to this before deleting. You can however make it not current without unattaching it to everything.
- You have been able to update or delete reference domains and reference domain values.

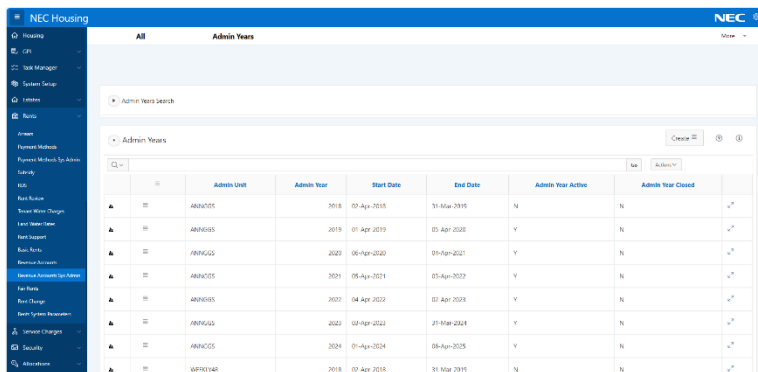
4.12 Rent Parameters

System parameters exist in each product area to determine global values for the configuration of the system.

Default values that are shipped may be changed. If a parameter has a status of required a value must be entered.

4.12.1 Viewing Rent Parameters

- From any page on the 'System Setup' modules navigation on the left-hand side find and select 'Rents' and then 'Rent System Parameters'
- You can now use the search to find and view any rents parameters
- You can find and view rent parameters



The screenshot shows the 'Admin Years' table in the NEC Housing system. The table has columns for Admin Unit, Admin Year, Start Date, End Date, Admin Year Active, and Admin Year Closed. There are 10 rows of data.

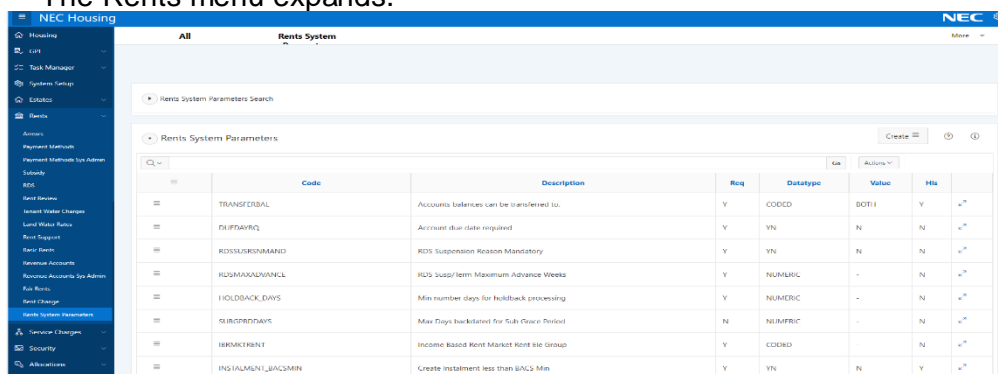
Admin Unit	Admin Year	Start Date	End Date	Admin Year Active	Admin Year Closed
ANNUOSS	2018	03-Apr-2018	31-Mar-2019	N	N
ANNUOSS	2019	01-Apr-2019	03-Apr-2020	Y	N
ANNUOSS	2020	06-Apr-2020	01-Apr-2021	Y	N
ANNUOSS	2021	05-Apr-2021	03-Apr-2022	Y	N
ANNUOSS	2022	04-Apr-2022	03-Apr-2023	Y	N
ANNUOSS	2023	03-Apr-2023	21-Mar-2024	Y	N
ANNUOSS	2024	01-Apr-2024	06-Apr-2025	Y	N
WFR0148	2018	03-Apr-2018	31-Mar-2019	N	N

4.12.2 Updating Rent Parameters

- Click System Setup.
The System Setup area appears with the default product area displayed.
- Click Rents
The Rents menu expands.
- Click Rents System Parameters.
The Rents System Parameters setup page appears.
- Click the Rents System Parameters link at the top of the setup page.
Tip: If the link isn't visible at the top of the screen, click More to expand the menu.
The page refreshes to display the selected region.
- Select Update Parameter Value from the Row Action list corresponding to the appropriate record.
The Update Parameter Value form appears.
- Enter the relevant data in the form.
Tip: Click the Help icon at the top of the form for further information.
- Click Save.
The form closes and you are returned to the Rents System Parameters region.
The changes you made to the parameter value have been applied.

14.13 Updating Rents System Parameters

- Click System Setup.
The System Setup area appears with the default product area displayed.
- Click Rents
The Rents menu expands.



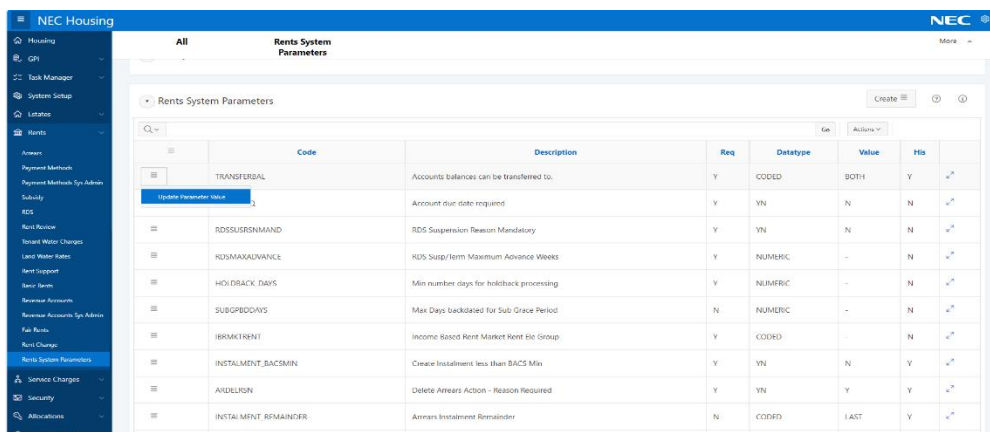
The screenshot shows the 'Rents System Parameters' table in the NEC Housing system. The table has columns for Code, Description, Req, Datatype, Value, and Hls. There are 8 rows of data.

Code	Description	Req	Datatype	Value	Hls
TRANSFERBAL	Accounts balances can be transferred to.	Y	CODED	BOTH	Y
DUFDAYREQ	Account due date required	Y	YN	N	N
RDSUSPNSREASONMAND	RDS Suspension Reason Mandatory	Y	YN	N	N
RDSMAXADVANCEWEEKS	RDS Susp/term: Maximum Advance Weeks	Y	NUMERIC	-	N
HOLDBACKDAYS	Min number days for holdback processing	Y	NUMERIC	-	N
SUBORDDAYS	Max Days backdated for Sub-Exec Period	N	NUMERIC	-	N
INCOMEKIND	Income based Rent Market Rent sic Group	Y	CODED	N	N
INSTALLMENT_BACSMIN	Create instalment less than BACS Min	Y	YN	N	Y

- Click Rents System Parameters.
The Rents System Parameters setup page appears.
- Click the Rents System Parameters link at the top of the setup page.
Tip: If the link isn't visible at the top of the screen, click More to expand the menu.

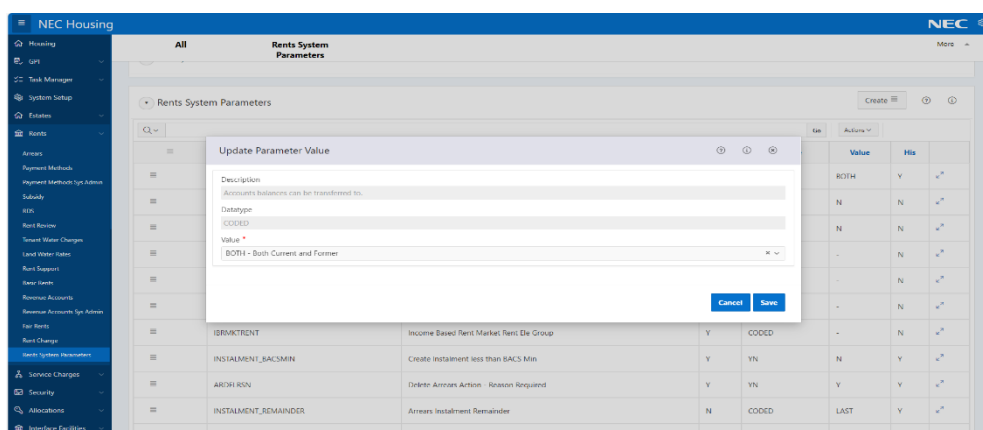
The page refreshes to display the selected region.

- Select Update Parameter Value from the Row Action list corresponding to the appropriate record.



The Update Parameter Value form appears.

- Enter the relevant data in the form.



Tip: Click the Help icon at the top of the form for further information.

- Click Save.
 The form closes and you are returned to the Rents System Parameters region.
 The changes you made to the parameter value have been applied.

5. Security Processes

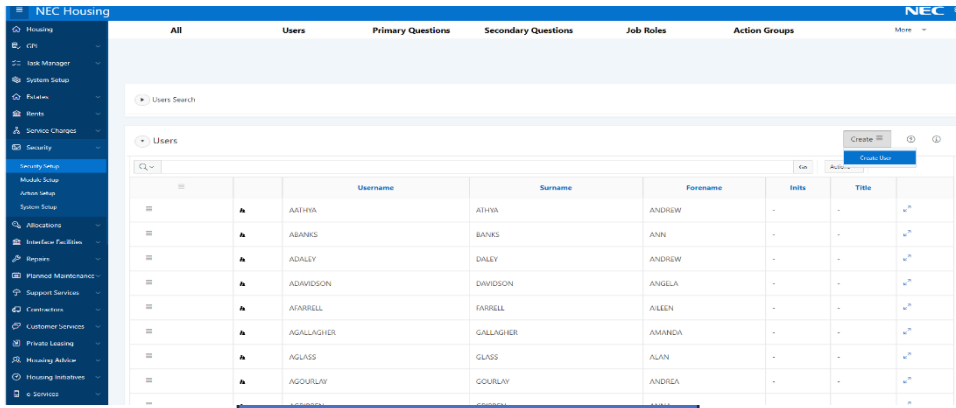
5.1 Users

Users are created and maintained in NEC Housing

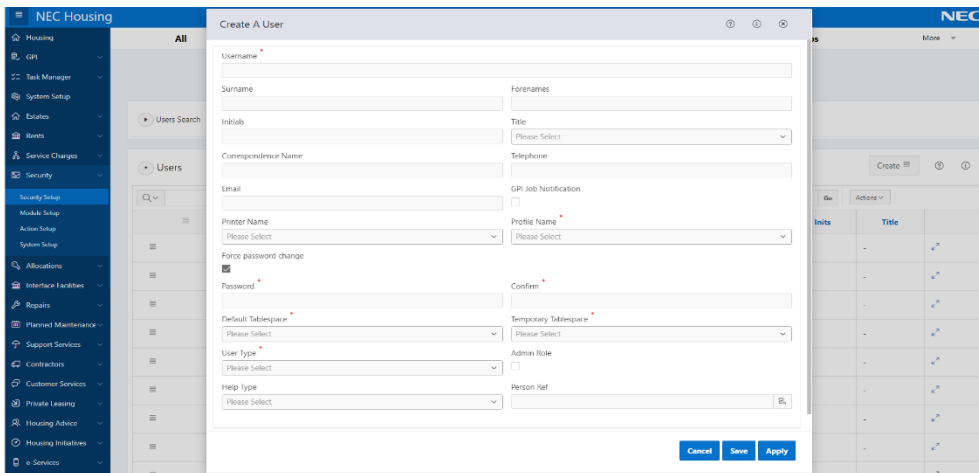
5.1.1 Creating a User

- From 'System Setup' go into 'Security' then 'Security Setup'

- Select 'Create' then 'Create User'



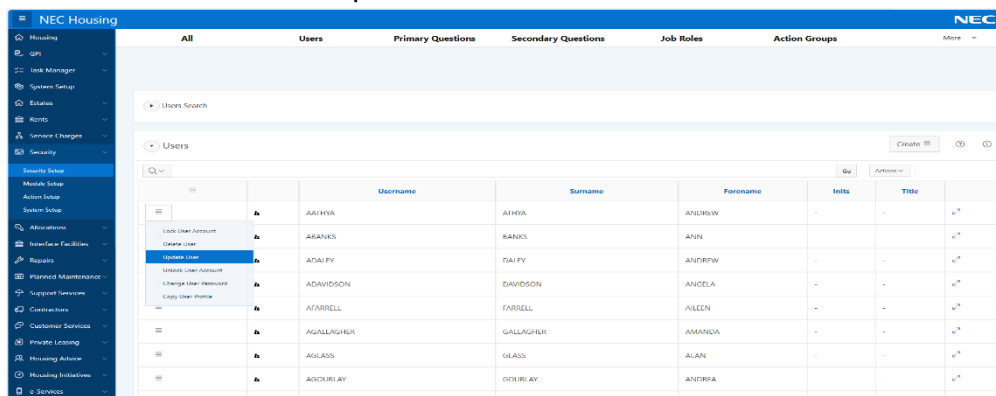
- Complete the 'Create User' wizard ensuring to follow the following:
 - Enter the username based on the person's first initial and surname
 - Enter the Profile Name is 'NEW_USER'
 - Enter the Default Tablespace is 'USERS'
 - Enter the Temporary Table Space is 'TEMP'
 - Enter the User Type is 'Housing'



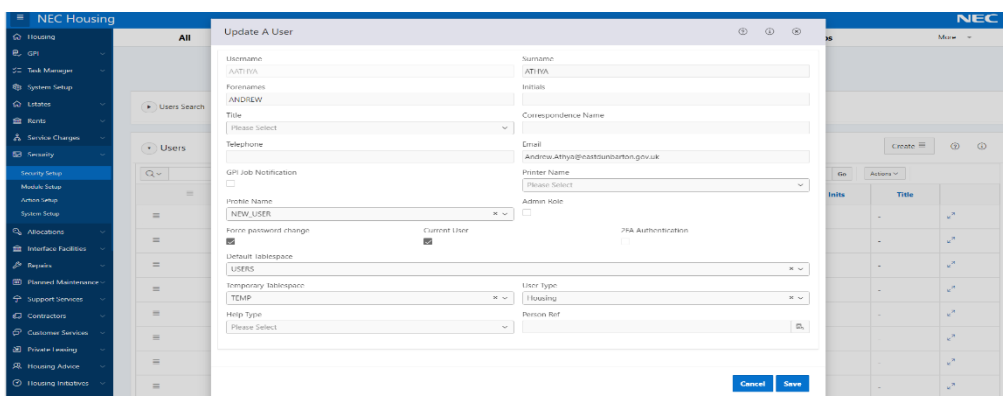
- Only tick Admin Role for System Users.
- Click 'Save'

5.1.2 Update or Delete a User

- From 'System Setup' go into 'Security' then 'Security Setup'
- Search for the user you'd wish to update
- 'Row Action' and select 'Update User'



- Update any of the details in the form and if the user is no longer an employee

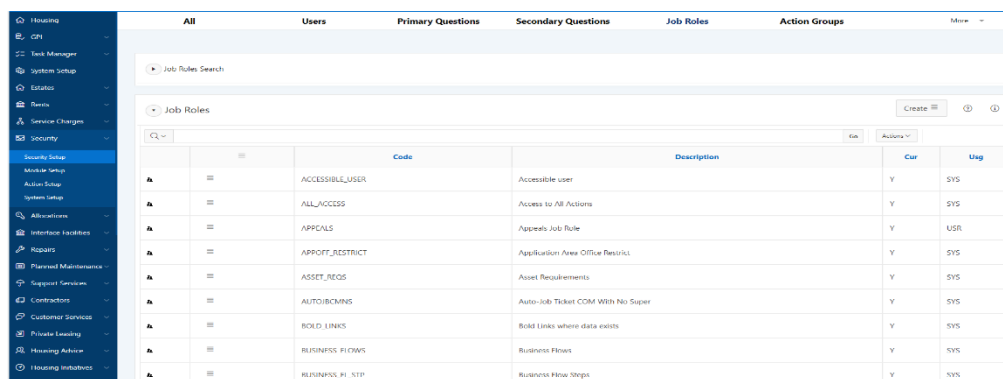


unselect 'Current User' Click 'Save'

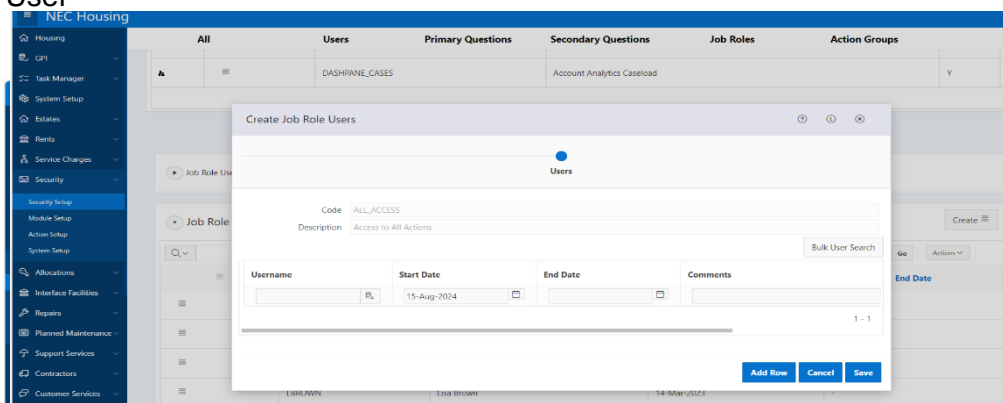
- If the user is no longer an employee also 'Row Action' and select 'Lock User's Account' and click 'OK'

5.1.3 Assigning a Job Role to a User

- From 'System Setup' go into 'Security' then 'Security Setup'
- Select 'Job Roles' from the top menu.



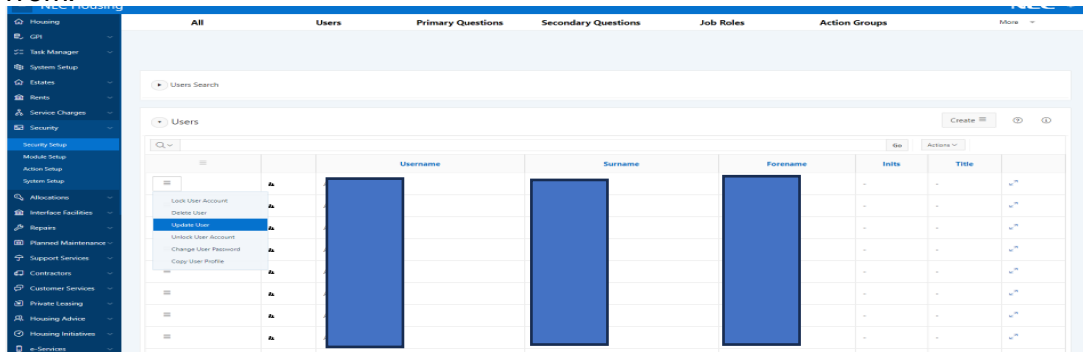
- Search for the job role due to be assigned to the user in the search bar and click 'Go'
- Parent and Child, the Job Role required
- Select the arrow at 'Job Role Users' section and click 'Create' then 'Create Job Role User'



- Search for the user and click 'Save'
- This will need done for any job role that user requires for their job.

5.1.4 Updating or Removing a Job Role to a User

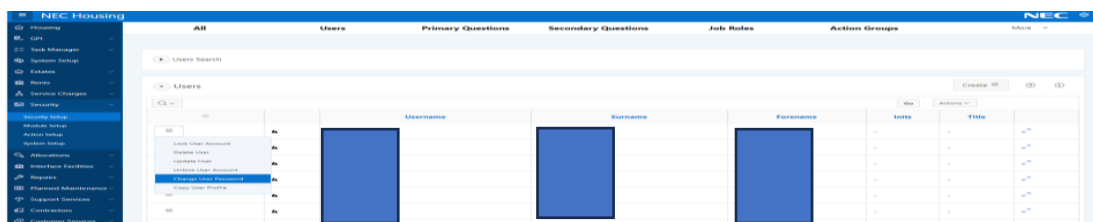
- From 'System Setup' go into 'Security' then 'Security Setup'
- Select 'Users' and then Row Action the user you want to update or remove a job role from.

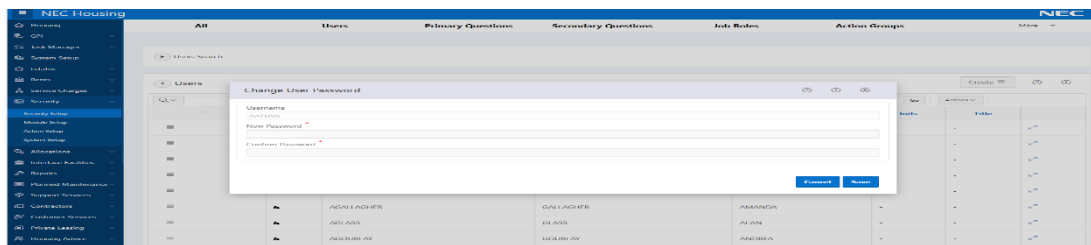
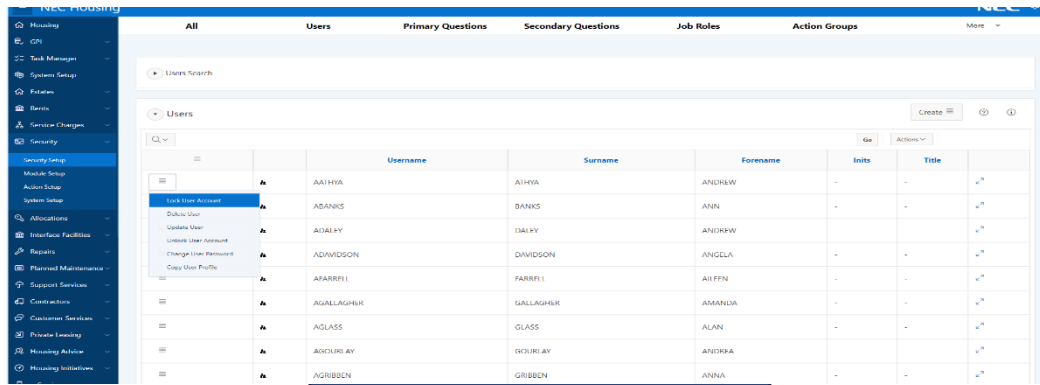


- Select the Arrow at 'User Job Roles' and row action the job role you want to remove, or bulk row action to update or remove them all.
- Enter an end date for any job role you want to remove and to update the user with a new job role select 'Add Row'
- Use the search bar under 'Job Role' and select the new job role.
- Click 'Save'

5.1.5 Resetting a User's Password

- From 'System Setup' go into 'Security' then 'Security Setup'
- Select 'Users' and then Row Action the user you want to reset the password for.
- Select 'Change User Password' and update the account with the new passwords

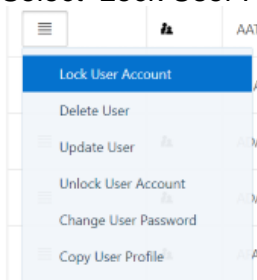




- Click 'Save'
- Colleagues should be able to reset their own password so if they are needing it reset regularly there might be an issue within the system.

5.1.6 Locking a User's Account

- From 'System Setup' go into 'Security' then 'Security Setup'
- Select 'Users' and then Row Action the user you want to reset the password for.
- Select 'Lock User Account'

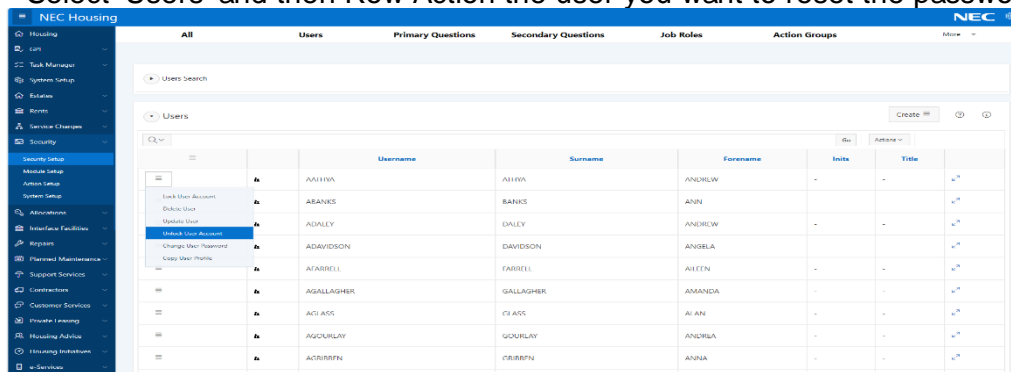


- Click 'OK'

5.1.7 Unlocking a User's Account

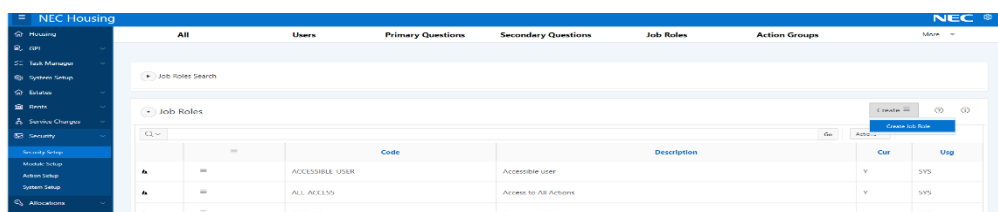
- From 'System Setup' go into 'Security' then 'Security Setup'

- Select 'Users' and then Row Action the user you want to reset the password for.



- Select 'Unlock User Account'
- Click 'OK'

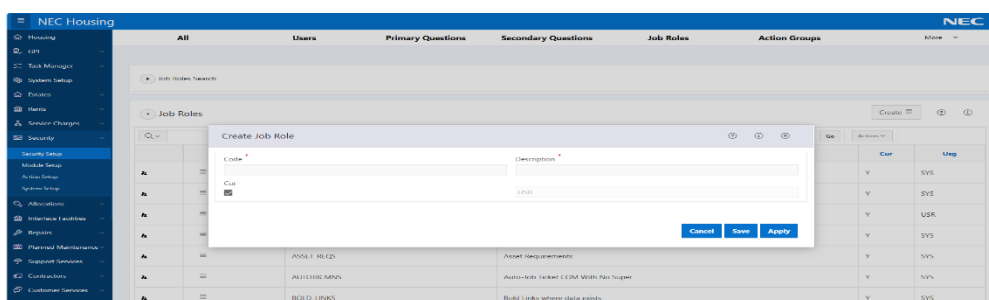
5.2 Job Roles



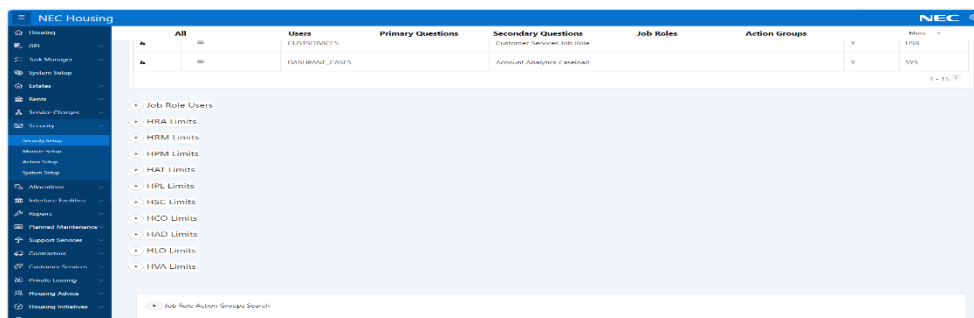
Job roles are used to define the job title that a user may be allocated.

5.2.1 Creating Job Roles

- From 'System Setup' go into 'Security' then 'Security Setup'
- Select 'Job Roles' from the top menu.
- Select 'Create' and then 'Create Job Role'



- Enter the 'Code' and 'Description' for the job role

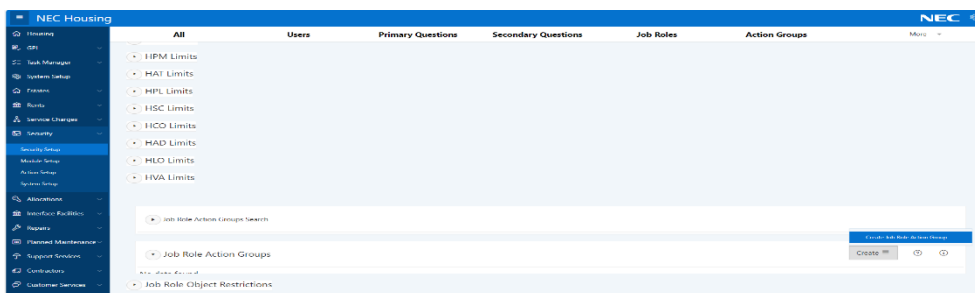


- Click 'Save'

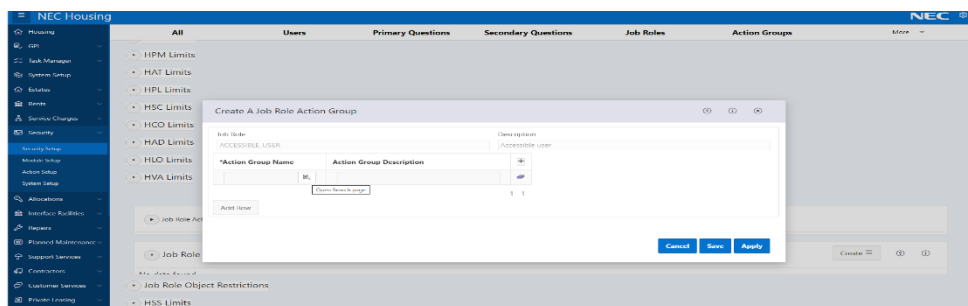
5.2.2 Assigning Action Groups to Job Roles

- From 'System Setup' go into 'Security' then 'Security Setup'

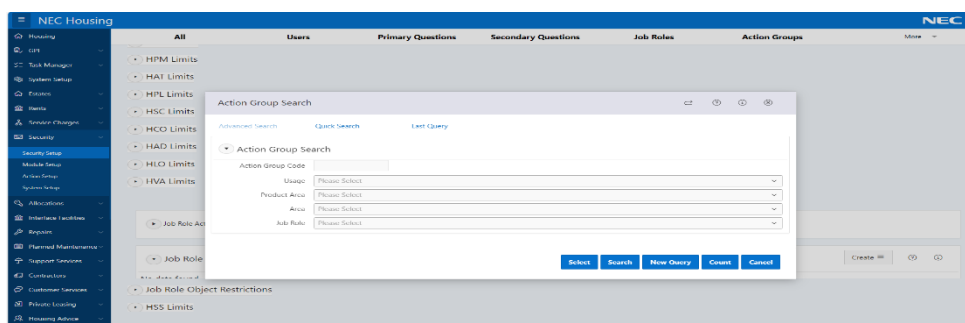
- Select 'Job Roles' from the top menu.



- Parent and child, the job role you want to assign action groups to



- Click the arrow on 'Job Role Action Groups'
- Select 'Create' and then 'Create Job Role Action Group'
- Click the 'Open Search Page' under 'Action Group Name'



- Select a product area you want to create the job role for.
- Tick the boxes of the Action Group Codes you want
- Click 'Select'
- Click 'Save'

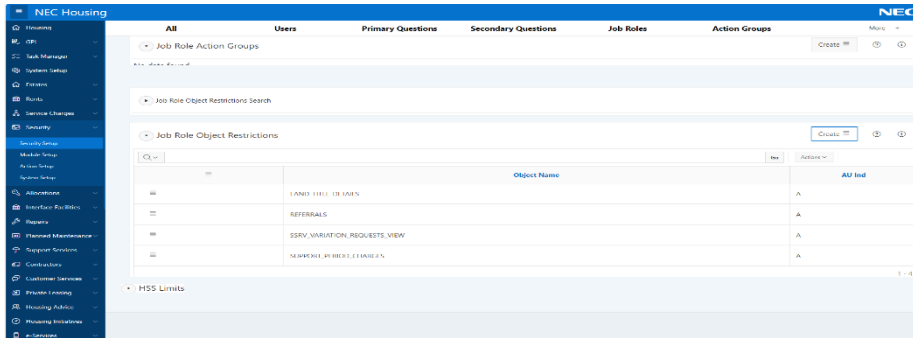
If you want to add more action groups from another product area, click 'Add Row' and then the 'Open Search Page' and look up another product area to add more action groups to the job role and repeat the process.

5.2.3 Removing Action Groups to Job Roles

- From 'System Setup' go into 'Security' then 'Security Setup'
- Select 'Job Roles' from the top menu.
- Parent and child, the job role you want to remove action groups from
- Click the arrow on 'Job Role Action Groups'

5.2.4 Creating Job Role Restrictions

- From 'System Setup' go into 'Security' then 'Security Setup'

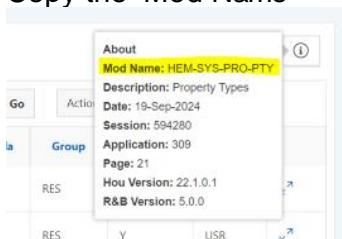


- Select 'Job Roles' from the top menu.
- Parent and Child, the Job Role you would like to add restrictions to.
- Click the arrow at 'Job Role Object Restrictions'

5.3 Modules

5.3.1 Checking Module Names

- Start from the page you are looking to get the module from. For example, notes on NEC, and find the 'Information Icon'
- Copy the 'Mod Name'



- Select 'System Setup' from the Module Navigation
- Select 'Security' and then 'Module Setup' from the Module Navigation
- Select 'Modules' from the top menu
- Select the arrow at 'Modules Search' and copy the 'Mod Name' into the 'Region ID' and click 'Search'

Modules Search
 Region ID: Module Name:
 Module Tab: Classification:
 Type: Default Description:
 User Description 1: Usage:
 Current: NCS Ind:
 Profile Name: Sub Type:
 Output Format: Save Output:

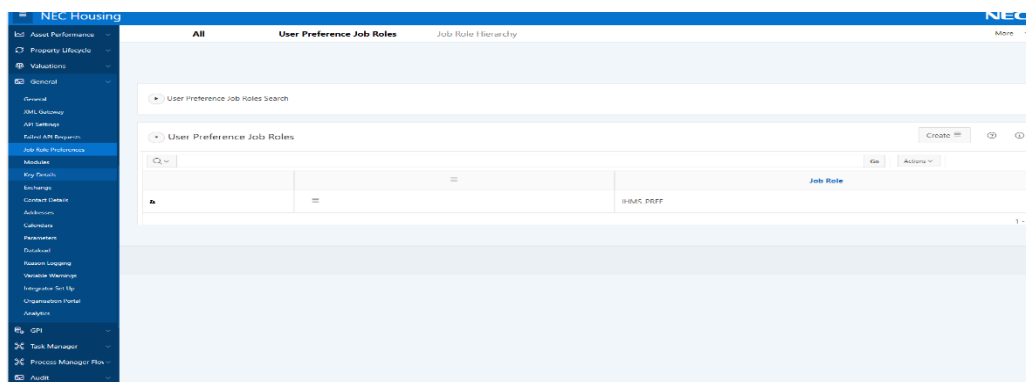
- Check the Module Name in the result box and this is your ID to identify that page on NEC.
- Some Names are the same as their Region ID but not all so this set is required.

5.3.2 Editing a Module's Navigation

- Complete the search for 'How to Check Module Names'
- Select 'Row Action' the module and select 'Module Details'
- Select 'Header Text' from the top menu
- Select 'Bulk Row Action' and then 'Update Field Labels'
- From here change the position of any that you'd like to move and update the 'Field in Use' to Yes or No as required.
- Click 'Save'

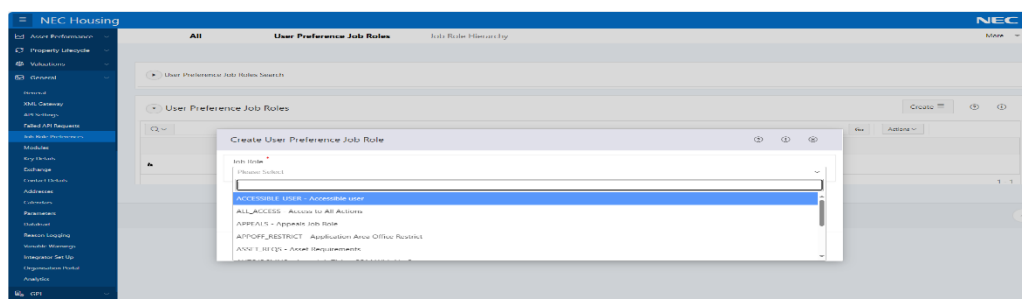
5.4 Preferences

The system preferences enable you to change some of the standard settings within the system to suit your own needs.

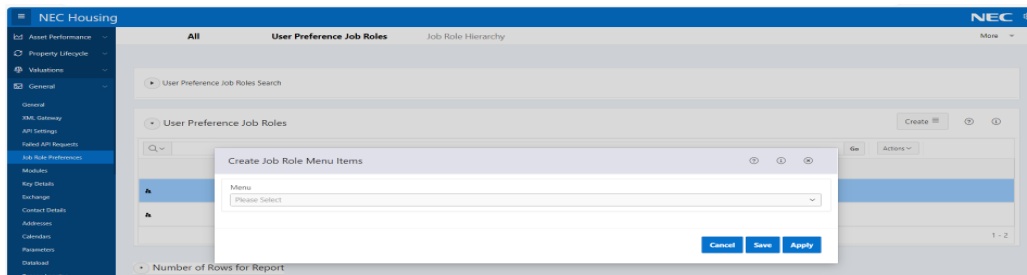


5.4.1 Setting up Navigation Preferences via Job Roles

- From 'System Setup' select 'General' and then 'Job Role Preferences'
- Select 'Create' and select the job role you want to create a preference for then click 'Save'

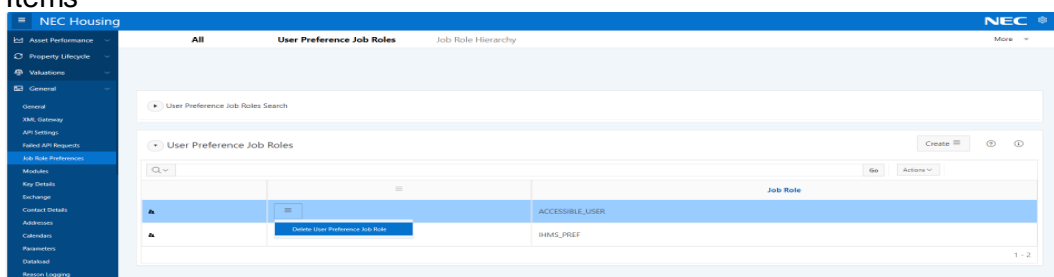


- Parent and Child, the job role
- Click the arrow to open 'Menu Items' and click 'Create' then 'Create Job Role Menu Items'



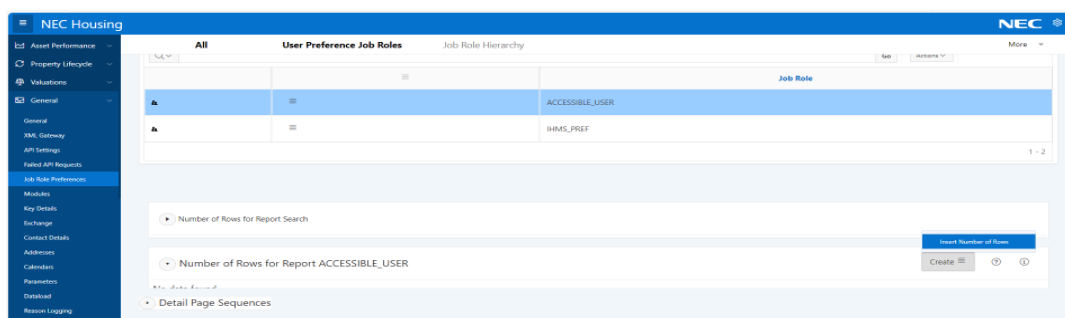
- Select 'Housing' and from here change the order of the Navigation Pane if required by changing the sequence and select the Default where you'd want the users to start when they log in.
- Click 'Save'
- Click 'Create' and 'Create Job Role Menu Items' again and select the defaulted option from the above steps. From here you can then reorder how the navigation pane for this module sits and select a default option within the module for the users to start from when they log in.
- Click 'Save'

To edit or delete the menu item preference 'Row Action' the one you'd wish to change and select either 'Update Job Role Menu Items' or 'Delete Job Role Menu Items'



5.4.2 Increasing Search Results

- Have a job role set up for preferences and attach the relevant action groups to this job role, e.g. System Team Preferences.
- From 'System Setup' select 'General' and then 'Job Role Preferences'
- Select 'Create' and select the job role you want to increase the search increase for and click 'Save'
- Parent and Child, the job role
- Click the arrow to open 'Number of Rows for Reports and click 'Create' then 'Insert Number of Rows'



- Select the module you want to increase the searches for and how many rows you would like it to bring back.
- Click 'Save'

- ‘To edit or delete the preferences “Row Action” the one you'd wish to change and select either “Update Number of Rows” or “Delete Number of Rows”.
- Only one job role per user can have preferences so best to arrange them by each teams’ requirements, e.g. Systems Team, Estates Team, Rents Team etc.’

5.4.3 Removing Navigation Actions from Action Groups - Tidy Up Pages

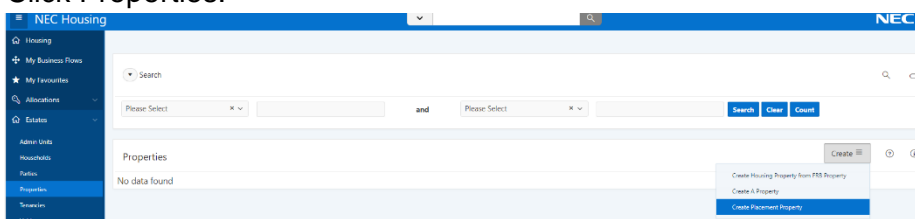
- Choose the area you wish to remove the navigation links from and complete the search for ‘How to Check Module Names’
- From here copy the ‘Module Name’ and go into ‘Security’ then ‘Action Setup’ and then ‘Navigation Non-Status Actions’
- Paste the ‘Module Name’ into the search bad and search.
- Look for the module name in the ‘Mod To’ column.
- If you are looking to remove the navigation to get to this page altogether copy all the actions and go to step 7. If you are looking to remove navigations from a particular area copy the ‘Mod From’ code
- Go back into ‘Module Setup’ and then ‘Modules’ and paste the ‘Mod To’ code into this. This should bring back where that link sits.
- Once you have your list of actions to remove go to ‘Security’ and then ‘Security Setup’ and then ‘Action Groups’
- Insert how we find the action group it belongs to
- ‘Row Action’ the action group and click ‘Copy Action Group’
- Create a new name for this, for example ACCOUNT_VIEW_HOUSING
- Click ‘Save’
- Parent and Child, the Action Group you have just created and click the arrow on ‘Navigation Action Groups’
- Find the Action codes from step 5 and click ‘Row Action’ and select ‘Delete Navigation Action Group’
- Once completed you will need to replace this action group with the original one in the job roles this change is being assigned to.

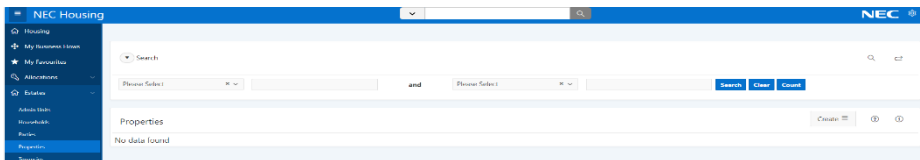
Remember to always copy an Action Group so you can revert to the original version if necessary.

6. Allocations Processes

6.1 Create a Placement Property

- Click Housing.
- The Housing menu expands.
- Click Estates.
- The Estates menu expands.
- Click Properties.



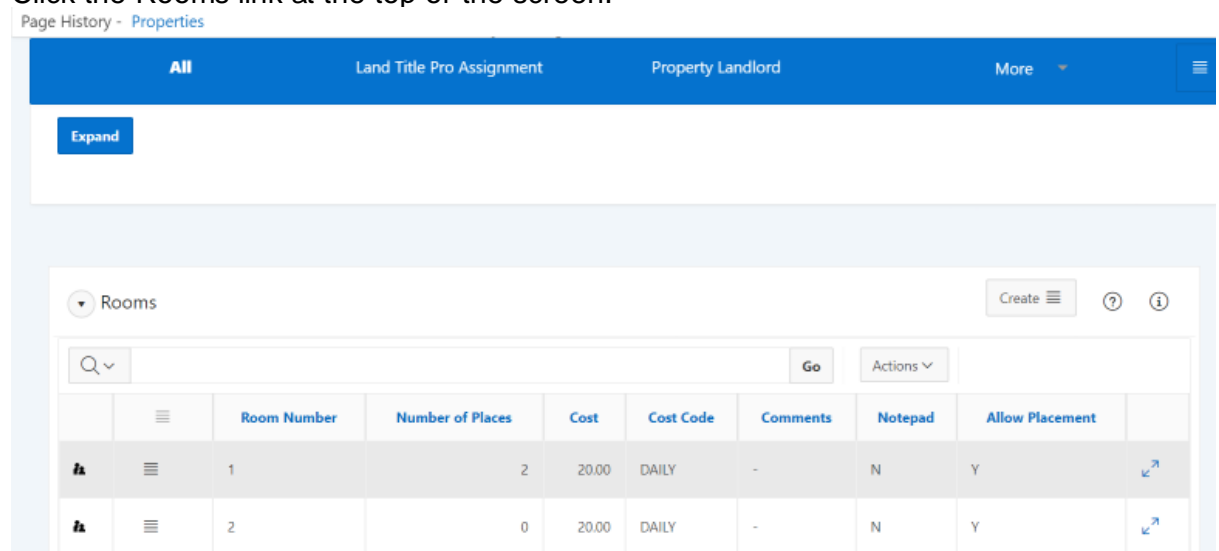


The Properties summary page appears.

- Click Create Placement Property from the Create list at the top of the region. The Create Placement Property wizard appears.
- Enter the relevant data in the wizard.
 Tip: Click the Help icon at the top of the wizard for further information.
- Click Save.
 The new property appears in the Properties region.
 The placement property has been created.

6.2 Create Placement Property Room

- Click Housing.
 The Housing menu expands.
- Click Estates.
 The Estates menu expands.
- Click Properties.
 The Properties summary page appears.
- Enter your search criteria in the Search area.
 If the Quick Search options do not meet your needs, click the Advanced Search icon at the top of the Search area, and enter more specific criteria.
 Tip:
 Click the Help icon at the top of the form for further information.
- Click Search.
 The records that meet your search criteria appear in the Properties region.
 Do one of the following:
 To select multiple records, check the boxes corresponding to the records you require, then select Property Details from the Bulk Actions list in the table heading.
 To select a single record, select Property Details from the corresponding Row Action list.
 The Property details page appears.
- Click the Rooms link at the top of the screen.



Tip:

If this link is not visible at the top of the screen, click More to expand the menu. The system scrolls down to the Rooms region.

- Select Create Placement Property Room from the Create list at the top of the region.

- The Create Placement Property Room form appears.
- Enter the relevant data in the form.
 Tip:
 Click the Help icon at the top of the form for further information.
- Click Save.
 The new placement property room appears in the Rooms region.
 The placement property room has been created.

6.3 Updating Placement Property Rooms

- Click Housing.
 The Housing menu expands.
- Click Estates.
 The Estates menu expands.
- Click Properties.
 The Properties summary page appears.

- Enter your search criteria in the Search area.

If the Quick Search options do not meet your needs, click the Advanced Search icon at the top of the Search area, and enter more specific criteria.

Tip:

Click the Help icon at the top of the form for further information.

- Click Search.

The records that meet your search criteria appear in the Properties region.

Do one of the following:

To select multiple records, check the boxes corresponding to the records you require, then select Property Details from the Bulk Actions list in the table heading.

To select a single record, select Property Details from the corresponding Row Action list.

The Property details page appears.

- Click the Rooms link at the top of the screen.

Tip: If this link is not visible at the top of the screen, click More to expand the menu.

The system scrolls down to the Rooms region.

- Select Update Placement Property Room from the Row Action list corresponding to the record you want to update.

	Room Number	Number of Places	Cost	Cost Code	Comments	Notepad	Allow Placement	
	1	2	20.00	DAILY	-	N	Y	↕ ↗
	0	20.00	DAILY	-	N	Y	↕ ↗	Update Placement Property Room Delete Placement Property Room

The Update Placement Property Room form appears.

- Enter the relevant data in the form.

Update Placement Property Room

Room Number: 1

Number of Places: 2

Cost: 20

Cost Code: DAILY - Daily charge

Comments:

Allow Placement:

Cancel Save

Tip:

Click the Help icon at the top of the form for further information.

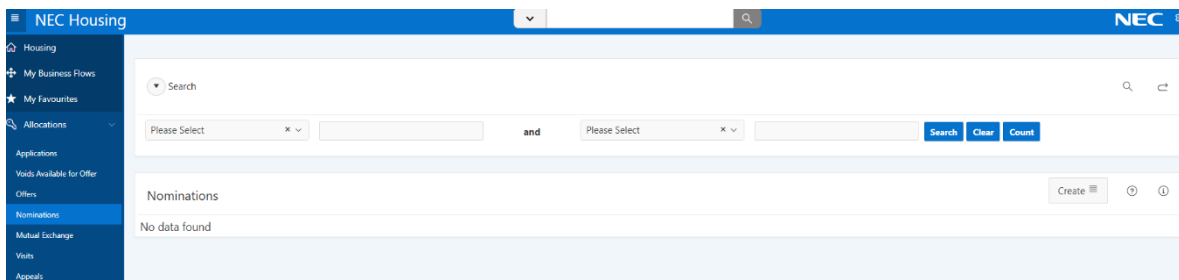
- Click Save.

The form closes and you are returned to the Rooms region.

The changes you made to the placement property room have been applied.

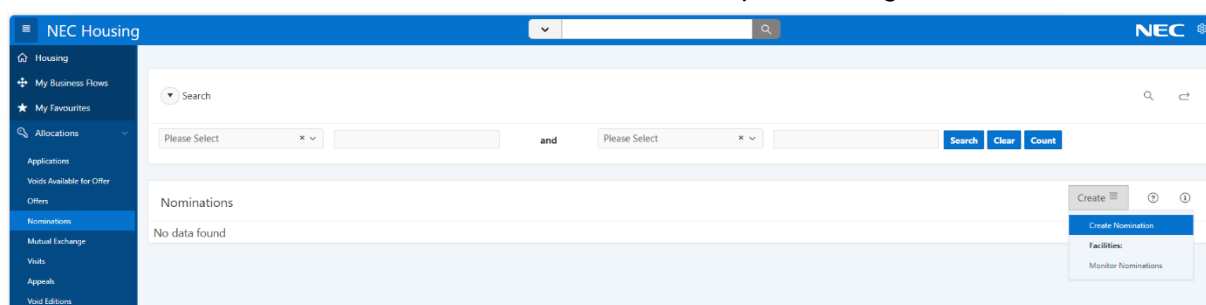
6.4 Create Nomination request

- Click Housing.
The Housing menu expands.
- Click Allocations.
The Allocations menu expands.
- Click Nominations.



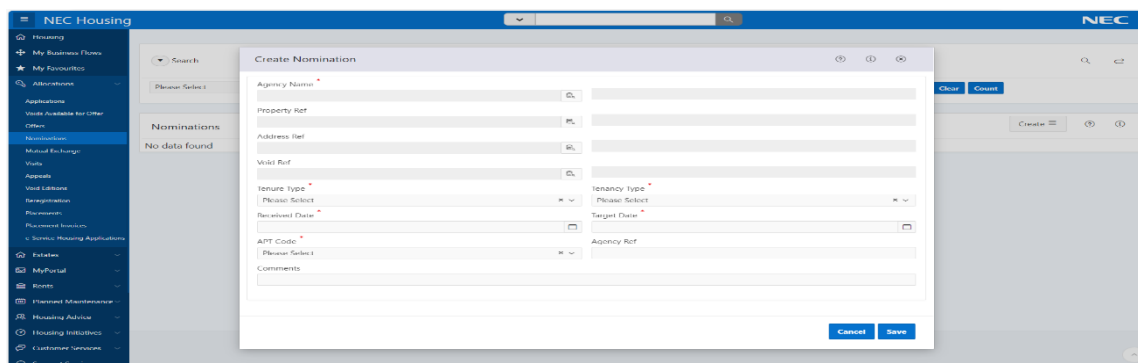
The Nominations page appears.

- Select Create Nomination from the Create list at the top of the region.



The Create Nomination form appears.

- Enter the relevant data in the form.
 - Agency Name - Use the Interested Party Type of 'Housing Association
 - Property Ref / Address Ref / Void Ref (only search on 1 of these options)
 - Tenure Type - HAH
 - Tenancy Type - HAT
 - Received Date - Date nomination come into EDC
 - Target Date - Estimated tenancy start date
 - APT Code - Makeup of the house (Examples in the next Tab)



Tip: Click the Help icon at the top of the form for further information.

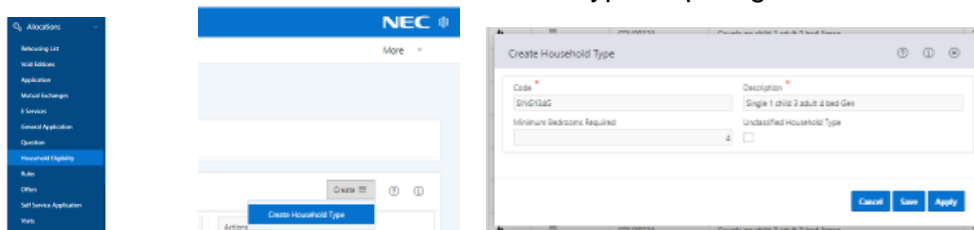
- Click Save.

The new nomination appears in the Nominations region.
 The nomination has been created.

6.5 Create a Household Code

The nomination has been created.

1. Go to system set-up, Allocations and select household eligibility. Select Create Household Type to create the household code that the house would link with. i.e a 2 bed house would be linked to a household type requiring 2 beds

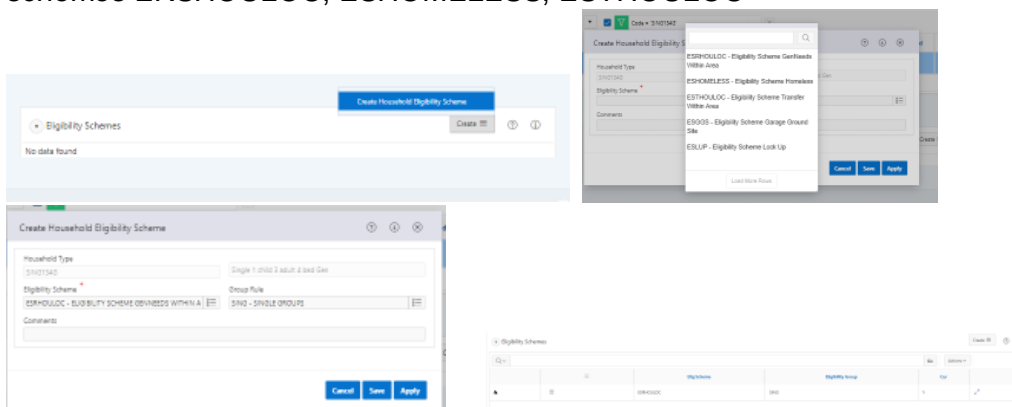


Below is what it should look like after you have created the code.

	Code	Description	Bed	Urc	Car
	SING124G	Single 1 child 2 adult 4 bed Gen	4	N	Y

Deselect this record

2. Select parent and child, eligibility schemes then create, you will be adding the schemes ERSHOULOC, ESHOMELESS, ESTHOULOC



Below is what it should look like after you have created the eligibility scheme.

	Id	Eligibility Scheme	Bed	Urc	Car
	ERSHOULOC	ERSHOULOC - Eligibility Scheme Garbages Within Area			

3. Select parent and child once these are created and on each scheme the following must be done; Eligibility Questions & Eligibility Criteria
4. Eligibility questions – add the following questions 335, 329, 330, 331, 1198, follow the wizard to build this.

Create Eligibility Question

Household Type: SING134G

Single 1 child 3 adult 4 bed Gen

Question Ref: 335

Coded Answer: SING

Answer: []

Min Value: []

Sequence: 10

Single or Couple: []

Buttons: Cancel, Save, Apply

5. Eligibility criteria- create, select APT code, then add by element.

Create Eligibility Criteria

Household Type: SING134G

Single 1 child 3 adult 4 bed Gen

Eligibility Scheme: []

Eligibility Scheme (readonly) filter area

APT Code: 335

APT Description: Single 1 child 3 adult 4 bed Gen

Buttons: Cancel, Save, Apply

Search for the element of Beds and type the value in based on the number of beds.

Allocation Property Type Search

Advanced Search | Quick Search | Last Query

Element: 335

Value: 4

Buttons: Select, Search, New Query, Cancel, Clear

Then select all properties which apply (i.e. if it is a general property – select all with general in it)

Allocation Property Type Search

APT Code	APT Description	Selected
AP0100	1 Bed 10th Floor General	<input type="checkbox"/>
AP0101	1 Bed 10th Floor General	<input type="checkbox"/>
AP0102	1 Bed 10th Floor General	<input type="checkbox"/>
AP0103	1 Bed 10th Floor General	<input type="checkbox"/>
AP0104	1 Bed 10th Floor General	<input type="checkbox"/>
AP0105	1 Bed 10th Floor General	<input type="checkbox"/>
AP0106	1 Bed 10th Floor General	<input type="checkbox"/>
AP0107	1 Bed 10th Floor General	<input type="checkbox"/>
AP0108	1 Bed 10th Floor General	<input type="checkbox"/>
AP0109	1 Bed 10th Floor General	<input type="checkbox"/>
AP0110	1 Bed 10th Floor General	<input type="checkbox"/>
AP0111	1 Bed 10th Floor General	<input type="checkbox"/>
AP0112	1 Bed 10th Floor General	<input type="checkbox"/>
AP0113	1 Bed 10th Floor General	<input type="checkbox"/>
AP0114	1 Bed 10th Floor General	<input type="checkbox"/>
AP0115	1 Bed 10th Floor General	<input type="checkbox"/>
AP0116	1 Bed 10th Floor General	<input type="checkbox"/>
AP0117	1 Bed 10th Floor General	<input type="checkbox"/>
AP0118	1 Bed 10th Floor General	<input type="checkbox"/>
AP0119	1 Bed 10th Floor General	<input type="checkbox"/>
AP0120	1 Bed 10th Floor General	<input type="checkbox"/>

Buttons: Select, Search, New Query, Cancel, Clear

6. This needs to be done for all three schemes and any household codes that would be linked to the property you have created.