How to create a Regeneration project on HARP

Please Note : At all times please only click once when selecting a command - the system doesn't like double clicks

General:SG Housing and Regeneration staff as well as applicant organisations with access to HARP are all able to create a Regeneration project on HARP. Any new projects created should be agreed projects. The system should not be used to create projects which are unlikely to receive funding.

If at any time you have to come out of the system once the project has been set up, insert the reference number of the Project you previously created into the Quick Search field (at the top right hand corner of the screen) and click 'Quick Search'. This should return the record you require.

Step	User	Step Description	Input Field	Input Data
1		**Log on** to the system		
2		Select **Project** from the left hand Menu Bar	Project	
3		Select **All** from the Menu	All	
4		Select **+Add New** from Project List to display the Main Details screen	Add New	
5		Enter Project Information noting the mandatory fields marked with an asterisk *	Name* Status* Applicant* Local Authority* Local Authority Area* Grant provider* Programme*	Enter the Project Name Pre-populated If you are logging in as an Applicant this will be pre-populated Choose from the dropdown Choose one from the dropdown if listed Pre-populated once the Programme is chosen Choose the relevant Programme
6		Enter Postcode	Postcode	Enter the Postcode of the Project
7		Select **Search Icon** in blue box to get postcode look up tables		
8		Select **Select Address** from dropdown	Select Address	Enter the Address of the Project
9		Enter remaining Project Information noting the mandatory fields marked with an asterisk* Some fields will be mandatory dependent on the type of Programme chosen.	X Easting Y Northing Which SIMD deos your project relate to Geographical Code* Estimated Start Date* Actual Start Date Estimated Completion Date* Actual Completion Date Slippage - check box Town Centre Third Party Agent Solictor Quantity Surveyor	If relevant - Enter the information (between 0 and 500000) If relevant - Enter the information (between 500000 and 1300000) If relevant - Enter the information (link to SIMD provided) Choose from the dropdown Enter the est start date of the Project Enter the Actual start date of the Project if already started Enter the est completion date of the Project Not available for update Dont check Don't check Leave Blank Leave Blank Leave Blank
10		Select **Save**	Save	
11		All Project tabs will now become visible to the user		
12		Select **Additional Local Authority Area** if this is required for the Project	Additional Local Authority Area	

13		Select **+Add New** from Project Additional Local Authority Area List to display the Main Details screen	Add New	
14		Enter Additional Local Authority, Local Authority Area and/or Postcode Information. The Local Authority Area dropdown will be dependent on the Local Authority chosen.	Local Authority Local Authority Area Post Code	
15		Select **Funding Breakdowns**	Funding Breakdowns	
16		Select **+Add New** from the Project Funding Breakdown List to display the Main Details screen	Add New	
17		Enter Funding Breakdown Information noting the mandatory fields marked with an asterisk *	Tenure Type* Provision Type* Client Type* Special Needs Amount*	Choose N/A from the dropdown Choose from the dropdown Choose from the dropdown This will be auto checked dependent on the choices made above Insert the amount against this specific provision and client
18		Select **Save**	Save	
19		Select **Back**	Back	
20		Take a note of the Project Ref from the system banner for later on in the process		
21		All other tabs such as Outcome, Outputs, Supporting Outcomes and Reporting Schedule will be updated when an application is made against the Project. Other tabs such as Funding Offer, Grant Planning Target etc will be completed by the Regeneration Team through the application process.		

How to create a PCF or SCF Application

Step	User	Step Description	Input Field	Example Input Data
1	**Log in as an Applicant Inputter if you require an Internal Review process or log in as an Applicant Approver to send direct to SG**	**Log on** to the system using your user name and password		
2		Enter the **Project Reference Number** for the project you require into the quick search field on the top right of the screen - using a "P" or "T" prefix depending on whether the project was created in HARP ("P") or our Previous TRS system ("T") and hit **Quick Search**	p17 × Quick Search (Project Reference Number)	
3		Select **Edit** Project	Edit View	
4		Select **Applications** Tab	Applications	
5		Select **Add New**	Add New	
6		Check **I Confirm the Accuracy**	I Confirm The Accuracy	Check this box to indicate agreement that the information being input is accurate
7		Select **Save**	Save	
8		Select **Organisation Details**	Organisation Details	
9		Enter Organisation Details information		
10		Select **Save**	Save	
11		Select **Back**	Back	
12		Select **Governing Body & Track Record**	Governing Body & Track Record	
13		Enter Governing Body & Track Record Details		
14		Select **Save**	Save	
15		Select **Back**	Back	
16		Select **Proposal Overview**	Proposal Overview	
17		Enter Proposal Overview Details		
18		Select **Save**	Save	

19		Select **Back**	Back	
20		Select **Milestones**	Milestones	
21		Select **Add New**	Add New	
22		Enter Milestone Details		
23		Select **Save**	Save	
24		Select **Back**	Back	
25		Select **Supporting Outcomes**	Supporting Outcomes	
26		Select **Add New**	Add New	
27		Enter Supporting Outcomes Details		
28		Select **Save**	Save	
29		Select **Back**	Back	
30		Select **Outcomes**	Outcomes	
31		Select **Add New**	Add New	
32		Enter Outcomes Details		
33		Select **Save**	Save	
34		Select **Back**	Back	
35		Select **Outputs**	Outputs	
36		Select **Add New**	Add New	
37		Enter Output Details		
38		Select **Save**	Save	
39		Select **Back**	Back	
40		Select **Monitoring Evaluation**	Monitoring & Evaluation	
41		Enter Monitoring Evaluation Details		
42		Select **Save**	Save	
43		Select **Back**	Back	
44		Select **Cost Breakdowns**	Cost Breakdowns	
45		Select **Add New**	Add New	
46		Enter Cost Breakdown Details		

47		Select **Save**	Save	
48		Select **Back**	Back	
49		Select **Financial Breakdown**	Financial Breakdowns	
50		Select **Add New**	Add New	
51		Enter Financial Breakdown Details		
52		Select **Save**	Save	
53		Select **Back**	Back	
54		Select **Funding Breakdown**	Funding Breakdowns	
55		Select **Add New**	Add New	
56		Enter Funding Breakdown Details		
57		Select **Save**	Save	
58		Select **Back**		
59		Select **In Kind Contributions**	In Kind Contributions	
60		Select **Add New**	Add New	
61		Enter In Kind Contributions Details		
62		Select **Save**	Save	
63		Select **Back**	Back	
64		Select **Application** tab	Application	
65		Select '**Submit to Awaiting Recommendation'** or if an internal review process is required in the organisation select **'Submit to Awaiting Internal Review'**		
66		If logged in as an Applicant Inputter or Endorser you will now be able to **Submit the application to Awaiting Internal Review**	Submit to Awaiting Internal Review	
67		If logged in as an Applicant Approver you will now be able to Select **Submit to Awaiting Recommendation**	Submit to Awaiting Recommendation	
68		Enter Awaiting Recommendation Comment	Enter relevant text	
69		Select **Confirm**	Confirm	
70		Select **Logout** from top right hand of the HARP screen		

How to create a RCGF Application

Step	User	Step Description	Input Field	Example Input Data
1	**Log in as a LA Inputter if you require an Internal Review process or log in as an LA Approver to send direct to SG**	**Log on** to the system using your user name and password		
2		Enter the **Project Reference Number** for the project you require into the quick search field on the top right of the screen - using a "P" or "T" prefix depending on whether the project was created in HARP ("P") or our Previous TRS system ("T") and hit **Quick Search**	p17 ✕ Quick Search (Project Reference Number)	
3		Select **Edit** Project	Edit View	
4		Select **Applications** Tab	Applications	
5		Select **Add New**	Add New	
6		Check **I Confirm the Accuracy**	I Confirm The Accuracy	Check this box to indicate agreement that the information being input is accurate
7		Select **Save**	Save	
8		Select **Milestones**	Milestones	
9		Select **Add New**	Add New	
10		Enter Milestone Details		
11		Select **Save**	Save	
12		Select **Back**	Back	
13		Select **Proposal Overview**	Proposal Overview	
14		Enter Proposal Overview Details		
15		Select **Save**	Save	
16		Select **Back**	Back	
17		Select **Project Income**	Project Income	
18		Select **Add New**	Add New	
19		Enter Project Income Details		

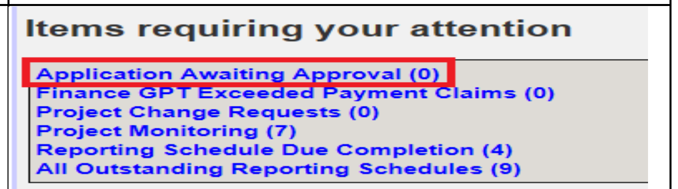
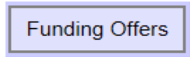
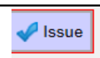
20		Select **Save**	Save	
21		Select **Back**	Back	
22		Select **Supporting Outcomes**	Supporting Outcomes	
23		Select **Add New**	Add New	
24		Enter Supporting Outcomes Details		
25		Select **Save**	Save	
26		Select **Back**	Back	
27		Select **Outcomes**	Outcomes	
28		Select **Add New**	Add New	
29		Enter Outcomes Details		
30		Select **Save**	Save	
31		Select **Back**	Back	
32		Select **Outputs**	Outputs	
33		Select **Add New**	Add New	
34		Enter Output Details		
35		Select **Save**	Save	
36		Select **Back**	Back	
37		Select **Partnerships**	Partnerships	
38		Select **Add New**	Add New	
39		Enter Partnership Details		
40		Select **Save**	Save	
41		Select **Back**	Back	
42		Select **Monitoring Evaluation**	Monitoring & Evaluation	
43		Enter Monitoring Evaluation Details		
44		Select **Save**	Save	
45		Select **Back**	Back	

46		Select **Financial Breakdown**	Financial Breakdowns	
47		Select **Add New**	Add New	
48		Enter Financial Breakdown Details		
49		Select **Save**	Save	
50		Select **Back**	Back	
51		Select **Eligible Costs**	Eligible Costs	
52		Select **Add New**	Add New	
53		Enter Eligible Cost Details		
54		Select **Save**	Save	
55		Select **Back**	Back	
56		Select **Ineligible Costs**	Ineligible Costs	
57		Select **Add New**	Add New	
58		Enter Ineligible Cost Details		
59		Select **Save**	Save	
60		Select **Back**	Back	
61		Select **Funding Breakdown**	Funding Breakdowns	
62		Select **Add New**	Add New	
63		Enter Funding Breakdown Details		
64		Select **Save**	Save	
65		Select **Back**	Back	
66		Select **In Kind Contributions**	In Kind Contributions	
67		Select **Add New**	Add New	
68		Enter In Kind Contributions Details		
69		Select **Save**	Save	
70		Select **Back**	Back	

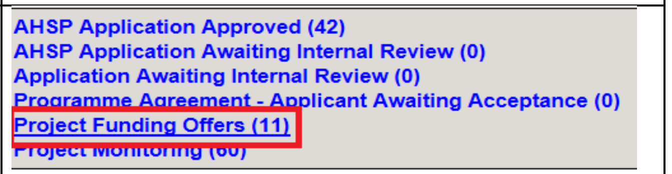
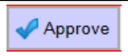
71		Select **Application** tab	Application	
72		Select '**Submit to Awaiting Recommendation'** or if an internal review process is required in the organisation select **'Submit to Awaiting Internal Review'**		
73		If logged in as an LA Inputter you will now be able to **Submit the application to Awaiting Internal Review**	Submit to Awaiting Internal Review	
74		If logged in as an LA Approver you will now be able to Select **Submit to Awaiting Recommendation**	Submit to Awaiting Recommendation	
75		Enter Awaiting Recommendation Comment	Enter relevant text	
76		Select **Confirm**	Confirm	
77		Select **Logout** from top right hand of the HARP screen		

How to carry out an appraisal of an application and create a Funding Offer on HARP

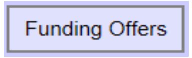
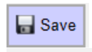
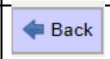
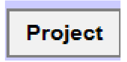
Step	User	Step Description	
1	**Regeneration Inputter**	**Log on** to the system	
2		Select **Application Awaiting Recommendation** from the **'Items requiring your attention'** list	Items requiring your attention Application Awaiting Recommendation (1) Finance GPT Exceeded Payment Claims (0) Project Monitoring (7) Reporting Schedule Due Completion (4) All Outstanding Reporting Schedules (9)
3		Select **Edit** against the relevant application - your Project Ref Number is detailed on this	Edit
4		Check that all the details of the application are correct by working your way through the tabs at the top of the screen	
5		Select **Funding Offers** tab just above Main Details	Funding Offers
6		Select **+Add New**	Add New
7		**Input:** Status- pre-populated within the system to read Draft Project Funding Offer Template*- pre-populated within the system Amount* - amount of funding awarded for the relevant Programme Accepted OBO (on behalf of) - leave blank, this is only to be used when individual organisation's business processes dictate	Enter numeric value
8		Select **Save**	Save
9		Select **View Document** and check that details are correct - at this stage the offer can be amended to reflect the relevant details	View Document
10		Select **Save**	Save
11		Select **Back**	Back
12		Select **Applications**	Applications
13		Select **Edit** against the draft application you are working on	Edit
14		If you are content then Select **Submit to Awaiting Endorsement**	Submit to Awaiting Endorsement
15		Enter your Awaiting endorsement Comment - if you are recommending that the funding offer be less or more than the application has requested this should be detailed here	
16		Select **Confirm**	Confirm
17		If you are not content with recommending the application for endorsement Select **Awaiting Rework**	Awaiting Rework
18		Enter your **Awaiting Rework Comment** - detailing reasons for passing back to applicant.	Enter text
19		Select **Confirm** which will now pass the application back to the applicant for rework. You should also notify the applicant by email or phone that you are sending the application back to them as they will not be automatically notified of this through the system.	Confirm

How to endorse an application			
20	**Regeneration Endorser**	**Log-in**	
21		Select **Application Awaiting Endorsement** from the 'Items requiring your attention' list	
22		Select **Edit** against the Application you wish to endorse	
23		Check that all the details of the application are correct by **working your way through the tabs at the top of the screen including the Funding Offer tab** where you can view and edit the funding offer as required	
24		Select **Submit to 'Awaiting Approval'**	
25		Enter Awaiting Approval Comment	Enter text as required
26		Select **Confirm**	
27		You will note that the Status in the Main Details has now changed to Awaiting Approval	
28		Select **Logout** from top right hand of the HARP screen	
How to Approve an Application and Issue a Funding Offer			
29	**Regeneration Approver**	**Log on** to the system	
30		Select **Application Awaiting Approval** from the 'Items requiring your attention' list	
31		Select **'Edit'** against the Application	
32		Check that all the details of the application are correct by **working your way through the tabs at the top of the screen**	
33		Select **Funding Offers**	
34		Select **Edit or View Document** and check that details are correct - **Edit** if you wish to make any amendments at this stage the offer can be amended	
35		Once you are content Select **Issue**	
36		Enter Comment	Enter text as required
37		Select **Confirm -** the offer will now be issued to the applicant and the project will automatically be approved.	
38		Select **Logout** from top right hand of the HARP screen	

How to accept a Funding Offer

39	**Applicant Approver**	**Log on** to the system	
40		Select **Project Funding Offers** from the 'Items requiring your attention' list - you will see a list of offers requiring your attention.	
41		Select **Edit** against the Funding Offer you want to review	
42		**View Document** to check it is acceptable.	
43		Select **Approve**	
44		Enter Comment	
45		Select **Confirm**	
46		Before logging out print a copy of the document for signature by your authorised signatory and return to SG by post	
47		Select **Logout** from top right hand of the HARP screen	

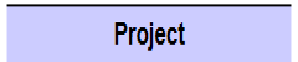
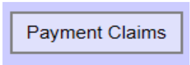
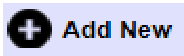
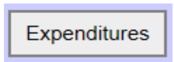
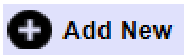
How to update on HARP that the signed copy of the Funding Offer has been received

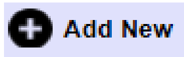
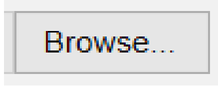
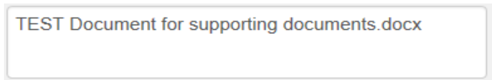
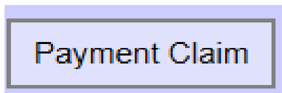
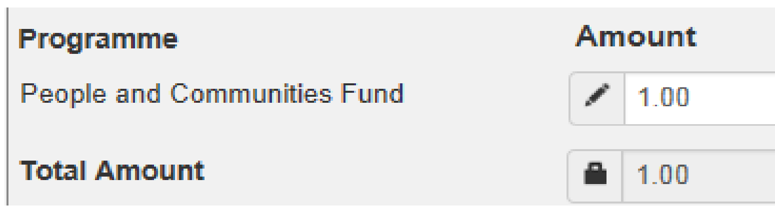
48	**Regeneration Approver**	**Log on** to the system	
49		Insert the number of the Project you previously created into the Quick Search field (at the top right hand corner of the screen)	
50		Select **Edit** against the Project	
51		Select **Funding Offers** tab	
52		Select **Edit** against the Funding Offer previously created	
53		Update **Date Signed Copy Received** with relevant date	
54		Select **Save**	
55		Select **Back**	
56		Select **Project** tab	
57		Check 2nd field in main details shows the Project as **'Live'**	
58		**Log out**	

How to update the GPT on HARP to allow payments to be paid (this will be agreed in principle when agreeing projects but for the purpose of the training packs the GPT should be put on at this stage)

59	**Regeneration Approver**	**Log on** to the system	
60		Insert the number of the Project you previously created into the Quick Search field (at the top right hand corner of the screen)	
61		Select **Edit** against the Project	Edit
62		Select **Grant Planning Target** tab	Grant Planning Target
63		Update the Project Grant Planning Target, the Financial Year will default to the current one	
64		Select **Save**	Save
65		Select **Back**	Back
66		**Log out**	

Submitting a Payment claim as an Applicant

Step	User	Step Description	Input Field
1	**Log in as an Applicant Finance Inputter if you require an Internal Review process - if not log in as an Applicant Finance Approver**	Log on to the System using your username and password	
2		Select **Project** from the menu on the left hand side	
3		Select **Live** from the project menu	
4		Ifdentify the project you want to make a payment against	
5		Select **Edit** against the Project	Edit
6		Select **Payment Claims** tab from the top section of the page	
7		Select **Add New**	
8		Enter remaining Payment Claim Information in fields which are white. Indicate with the checkbox whther you've entered Project Outputs to Date.	Type - **Cash Payment** Pay Alternative Payee - **select if relevant but not mandatory** Confirm Authorisation Req. Met - **if true then check this box** Comments - **enter if required but not mandatory**
9		Select **Save**	
10		Select **Expenditures** tab from top section of screen	
11		Select **Add New**	
12		Enter expenditure information in fields marked as white coloured. Only those with an asterisk are mandatory.	Expenditure Item* - **select correct value from dropdown** Other - **enter text as required** Amount of Expenditure* - **enter amount as required** Supporting Documentation Attached - **check this box if you are attaching invoices/receipts or copies of other paperwork** Comments - **enter if required**
13		Select **Save** and you should see the message that the record has been successfully saved	
14		If you require to add further expenditure items then **follow steps 11 to 13** for as many times as required	
15		Once you have finished entering the payment claim details select **Back**	

16		If you selected that you were attaching supporting documentation then select the **Supporting Documents** tab from the top of the page	
17		Select **Add New**	
18		Select **Browse** from the Main Details section of the page and this will allow you to find your document from your local :drives	
19		Seelect the document you want to attach and then select **open**	
20		You should then see the file path name in the box beside the browse button	
21		If you have attached the wrong document then either select **Back** and it won't be saved or else go through steps 18 to19 again	
22		Once you have attached your document Select **Save**	
23		You will see a green message saying the record has been successfully saved	
24		You wil also see the name of your supporting document in the white **Filename Field**	
25		You can attach as many supporting documents as required by **repeating steps 16 to 22**	
26		Once completed and saved Select **Back**	
27		To move the payment claim for internal authorisation within your organisation Select the **Payment Claim** tab from the top section of the screen	
28		You will see the completed details of the payment claim you have created	Programme
29		If there are more than one programme funding the project you will have the opportunity to allocate your claim across the different programmes whilst still staying within the total amount of your claim. A suggested amount will be provided against tenure, provision and client should you wish to request payment be set against a specific area. You will also have the opportunity to add an alternative payee and comment at this stage	

30		Depending on your role within your organisation and your business processes you can either select **Submit for Internal Review or Internal Authorise**	Submit for internal review / Internal Authorise
31		To **Submit for Internal Review** select that option	
32		You then have to enter a **Comment**	e.g. please review and authorise as above my delegated authority
33		Then select **Confirm**	Confirm
34		To authorise yourself Select **Internal Authorise**	Internal Authorise
35		Enter comment	E.G. Checked and authorised
36		Select **Confirm**	Confirm
37		The Main details of the payment will now show a **Status** of **Awaiting Regen Approval**	Status * Awaiting Regen Approval
38		You can now create other payment claims for other projects by repeating the steps within the training pack or if finished Select **Logout** from top right hand of the HARP screen	

Authorising a Payment claim as a Regeneration user to send to Finance for payment

Step	User	Step Description	Input Field
39	**Log in as Regeneration Approver, Endorser or Inputter**	**Log on** to the system	
40		Select **Finance** from the menu on the left hand side	**Finance**
41		Select **Payment Claims Awaiting Regen Approval** from the Finance menu	Payment Claims Awaiting Regen Approval
42		Ifdentify the payment claim you want to authorise for payment	
43		Select **Edit** against the Payment Claim	Edit
44		Select the **Authorise** or **Reject** tab above the Main Details page dependent on what action is required.	Authorise Reject
45		You then have to enter a **Comment**	e.g. reviewed by the Regeneration Team
46		Then select **Confirm**	Confirm
47		If Authorised, the payment claim has now been sent to the Finance Team for payment. If rejected this will not be paid and the status of the claim will show this.	
48		Select **Logout** from top right hand of the HARP screen	

Authorising a Submitted Payment Claim

1	**Log in as a Housing Finance Inputter, Endorser or Approver**	Log on to the System		
2		Under **Items requiring your attention** you will see **Payment Claims Awaiting Random Finance Check** and the number of claims in brackets	Items requiring your attention Payment Claims - Awaiting Random Finance Check (2) Payment Claims - Payment Threshold Breached (6) Finance Receipts (53) Project Change Requests (15)	
3		You can **either** select one of these options which will take you to the list of relevant payments **or** by scrolling down the page you will see the lists of payment claims under each of these headings		
4		Select '**Edit**' against the Project and payment claim you wish to review	Edit	
5		You will now be in the **Payment Claims** tab and the Status of the claim in the Main details field will say **Awaiting Finance - Random Check**		
6		Review the main details of the claim and also check the details within the **Expenditures** and **Supporting Document** tabs		
7		If you are happy that everything is in order then select **Authorise**	Authorise	
8		Enter a comment in the white field	E.g. Payment checked and authorised	
9		Select **Confirm**	Confirm	
10		The **Status** of the payment claim in the Main details section should now say **Paid**	Status * Paid	
11		Select **Back**		
12		You can then repeat for other payment claims or Select **Logout**	LOGOUT	

Actioning Payments Claims which have breached their Payment Threshold

1	**Log in as a Housing Finance Inputter, Endorser or Approver**	Log on to the System		
2		Under **Items requiring your attention** you will see **Payment Claims - Threshold Breached** with the number of claims in brackets	Payment Claims - Awaiting Random Finance Check (1) Payment Claims - Payment Threshold Breached (6) Finance Receipts (53) Project Change Requests (15)	
3		You can **either** select one of these options which will take you to the list of relevant payments **or** by scrolling down the page you will see the lists of payment claims under each of these headings		
4		Select '**Edit**' against the Project and payment claim you wish to review	Edit	
5		You will now be in the **Payment Claims** tab and the Status of the claim in the Main details field will say **Awaiting Finance - Payment Threshold Breached**		
6		Review the main details of the claim and also check the details within the **Expenditures** and **Supporting Document** tabs	Payment Claim / Expenditures / Supporting Documents / Status History	
7		If you are happy that everything is in order then select **Authorise**	Authorise	
8		Enter a comment in the white field	E.g. Payment checked and authorised	
9		Select **Confirm**	Confirm	
10		The **Status** of the payment claim in the Main details section should now say **Paid**	Status * Paid	
11		Select **Back**	Back	
12		If you are not happy that everything is in order with the claim then you can Select either **Reject** or **Rework Required**	Reject / Rework Required	
13		Enter a comment in the white field	E.g. Payment rejected or invoice missing	
14		Select **Confirm**	Confirm	
15		You can then repeat steps for other payment claims or Select **Logout**	LOGOUT	