







How to create an Adaptations 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 users with access to HARP are able to create a project on HARP. Any new projects created should be agreed with the Adaptations team with one project per Applicant.

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	SG Housing Endorser	Log on to the system		
2		Select Project from the left hand Menu Bar		
3		Select All from the Menu		
4		Select +Add New from Project List to display the Main Details screen		
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 Choose from the dropdown Choose from the dropdown Choose if applicable Pre-populated 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 Geographical Code* Which SIMD does your project relate to Estimated Start Date* Actual Start Date Estimated Completion Date* Actual Completion Date Slippage - check box Town Centre Project Third Party Agent Solicitor Quantity Surveyor	Leave Blank Leave Blank Choose from the dropdown Leave Blank This should be the 1st April of the relevant Financial Year Not available for update at this point This should be the 31st March of the relevant Financial Year Not available for update at this point Don't check Don't check Leave Blank Leave Blank Leave Blank
10		Select Save		
11		Select Logout from top right hand of the HARP screen		

How to request funding for Major Adaptations on HARP

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

General: Applicant Approvers with access to HARP are able to request funding for Major Adaptations on HARP.

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.

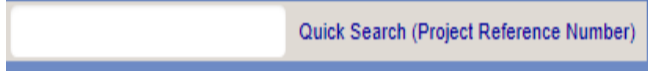

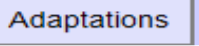
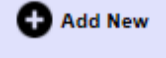
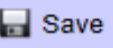


Step	User	Step Description	Input Field	Input Data
1	Applicant Approver	Log on to the system		
2		Insert the number of the Project into the Quick Search fields (at the top right hand corner of the screen)		
3		Select Edit against the Project		
4		Select Adaptations		
5		Select +Add New		
6		Enter Major Adaptation Information noting the mandatory fields marked with an asterisk * Expected Outturn and Additional Funding Required fields will appear once the Key Stage information is input, these 2 fields should not be completed at this stage	Type of Adaptation* Major Adaptation Type* Description of Adaptation* Funding Requested* Funding Awarded	Major Choose from the dropdown Input a description Input the funding required Not available for update
7		Select Save		
8		Select Key Stage		Key Date and Stage fields are shown
9		Select Add New		
10		Enter Key Date and Stage Information noting the mandatory fields marked with an asterisk *	Key Date* Stage*	Enter the Key Date of the Stage Explain what Stage this is
11		Select Save		
12		Select New if you want to add a further Stage		
13		Enter Key Date and Stage Information noting the mandatory fields marked with an asterisk *	Key Date* Stage*	Enter the Key Date of the Stage Explain what Stage this is
14		Select Save		
15		Select Back		
16		Select Project Adaptation on the crumb trail at the top		
17		Select Request Funding		
18		Select Logout from top right hand of the HARP screen		

How to request funding for General Adaptations on HARP

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

General: Applicant Approvers with access to HARP are able to request funding for General Adaptations on HARP.

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	Applicant Approver	Log on to the system		
2		Insert the number of the Project into the Quick Search fields (at the top right hand corner of the screen)		
3		Select Edit against the Project		
4		Select Adaptations		
5		Select +Add New		
6		Enter General Adaptation Information noting the mandatory fields marked with an asterisk * Expected Outturn and Additional Funding Required fields will appear once this information is saved, these 2 fields should not be completed at this stage	Type of Adaptation* Funding Requested* Funding Awarded	General Input the funding required Not available for update
7		Select Save		
8		Select Request Funding		
9		Select Logout from top right hand of the HARP screen		

How to Award Funding and create a Funding Offer on HARP
 Please Note - At all times please only click once when selecting a command - the system doesn't like double clicks

General: A Funding Offer will be sent to each Applicant successful in being awarded 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	SG Housing Endorser	Log on to the system		
2		Select Project from the menu bar	Project	
3		Select Adaptation Allocation	Adaptation Allocation	
4		Select Edit against the funding request	Edit	
5		Enter General Adaptation Information noting the mandatory fields marked with an asterisk*	Funding Awarded Expected Outturn Additional Funding Required	Input the funding you wish to award Input the expected outturn which will be the same amount as Funding Awarded Leave Blank as this is for the Review process
6		Select Save - this will now change the status of the request to Funding Awarded and you will now create a Funding Offer for this amount	Save	
7		Select Go To Project	Go To Project	
8		Select Funding Offers	Funding Offers	
9		Select Add New	Add New	
10		Enter remaining Funding Offer Information noting the mandatory fields marked with an asterisk*	Status* Project Funding Offer Template* Programme Amount Accepted OSO (on behalf of) Date Signed Copy Received	Pre-populated Pre-populated Pre-populated Enter the Funding Amount against the Programme Leave Blank No available for update at this point
11		Select Save	Save	
12		Select View Documents	View Document	
13		Select File Details	File Details	
14		Select Open	Open	
15		The document will now be open and can be edited. Once in the finalised format, select Save As and save this into your drive.		
16		Close Word		
17		Select Browse	Browse...	
18		Select the saved document and click Open	Open	
19		Select Save - the edited document will now be saved to the record	Save	
20		Select Back	Back	
21		Select Issue	Issue	
22		A comments box will be presented for you to input any comments you have for the Applicant		
23		Select Confirm once you have input your comments or select Cancel if you do not wish to proceed. If confirmed this will send the Funding Offer through HARP to the recipient	Confirm Cancel	
24		Select Back	Back	
25		Select Grant Planning Target	Grant Planning Target	
26		The Funding Period will be pre-populated with the current Financial Year but can be changed via the dropdown	Funding Period From: 2017/18 Funding Period To: 2017/18 Create Financial Period	
27		Enter the Grant Planning Target Amount against the Programme - this will be the same amount as the Funding Offer Amount.	Programme: 2016/17 RSL Adaptations: 1000000000.00	
28		Select Save	Save	
29		Select Back	Back	
30		Take a note of the Project Reference Number from the top of the screen for later on in the process		
31		Log out	LOGOUT	

Step	User	Step Description	Input Field	Input Data
32	Applicant Approver	Log on to the system		
33		Select Project Funding Offers from the 'Items requiring your attention' list	Items requiring your attention AHSP Application Approved (27) AHSP Application Awaiting Internal Review (0) Application Awaiting Internal Review (0) Programme Agreement - Applicant Awaiting Acceptance (0) Project Funding Offers (9) Project Monitoring (9)	
34		Select Edit against the Funding Offer. You may have to go into a different page using the page control buttons on the top and bottom of the Project Funding Offer list	Edit View	
35		Select View Document to check it is acceptable.	View Document	
36		Select Approve or Reject	Approve Reject	
37		A comments box will be presented for you to input any comments you have for SG.		
38		Select Confirm once you have input your comments or select Cancel if you do not wish to proceed.	Confirm Cancel	
39		Select Logout from top right hand of the HARP screen	LOGOUT	
40		The Applicant should let SG know via letter or email that they have accepted the funding award.		

Step	User	Step Description	Input Field	Input Data
41	SG Housing Endorser	Log on to the system		
42		Insert the number of the Project into the Quick Search fields (at the top right hand corner of the screen)	Quick Search (Project Reference Number)	
43		Select Edit against the Project	Edit View	
44		Select Funding Offers tab	Funding Offers	
45		Select Edit against the Funding Offer previously created	Edit View	
46		Update Date Signed Copy Received with relevant date using the calendar box provided.	Date Signed Copy Received	
47		Select Save	Save	
48		Select Back	Back	
49		The status of the Project Funding Offer is now Approved which has updated the status of the Project to Live. This will allow payments to be created against it.		
50		Log out	LOGOUT	


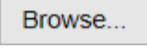


How to update the GPT on HARP to allow payments to be paid (this will be agreed in principle when agreeing projects but for the purpose of the training packs the GPT should be put on at this stage)

Step	User	Step Description	Input Field	Input Data
1	SG Housing Endorser	Log on to the system		
2		Insert the number of the Project you previously created into the Quick Search field (at the top right hand corner of the screen)	Quick Search (Project Reference Number)	
3		Select Edit against the Project	Edit View	
4		Select Grant Planning Target tab	Grant Planning Target	
5		Update the Project Grant Planning Target, the Financial Year will default to the current one		
6		Select Save	Save	
7		Select Back	Back	
8		Log out		

How to download and upload a CSV file to create an Adaptations payment on HARP

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

General: Please take time to read the Important Information notice on this page. Also, a CSV file payment cannot be created for a Project which has either no funding available or where the payment is more than the funding available.

Step	User	Step Description	Input Field	Input Data
1	Applicant Approver	Log on to the system		
2		Select Project from Menu Bar	Project	
3		Select Upload CSV from Menu	 Upload CSV	
4		Using Excel workbook provided as a download, record your claims/monitoring information		
5		Save As .CSV file to your computer system		
6		Enter the Project File Upload Information noting the mandatory fields marked with an asterisk *	Upload Type* Append to Programme* Project Search* Append to Project* File Upload*	Choose Adaptations Claims and Monitoring from the dropdown Choose the correct Programme from the dropdown Input your Project Reference Number and Search Choose your Project from the dropdown list Go to next step on how to Browse
7		Select Browse		
8		Select File from default directory		Locate file already saved previously
9		Select Open from browser	 AdaptationsClaimsAndMonitoringUpload	
10		Select Upload		
11		If there is sufficient funding in place this has now created the relevant Payment Claim for internal review by the Applicant Finance Approver. To note, this will be queued for processing and may take around 10 minutes to show up on the Applicant Finance Approver's action list.		
12		Log Out	LOGOUT	

How to process a Payment Claim for a list of Adaptation properties on HARP

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

General: The Applicant Finance Approver will have the option to internally review the Payment Claim and make a decision on whether it should be submitted to Scottish Government for payment. All Adaptation Properties will show up in the Expenditure items of the Payment Claim.

How an Applicant can internally authorise a Payment Claim

Step	User	Step Description	Input Field	Input Data
1	Applicant Finance Approver	Log on to the system		
2		Select Awaiting Internal Authorisation Payment Claims from 'Items requiring your attention'	Items requiring your attention Draft / Rework Payment Claims (15) Awaiting Internal Authorisation Payment Claims (29)	
3		Select Edit against the Payment Claim previously created. You may have to go into a different page using the page control buttons on the top and bottom of the Project Funding Offer list	Edit View	
4		Enter Payment Claim Information noting the mandatory fields marked with an asterisk *	Status Claim Reference Number Type Financial Year Pay Alternative Payee Confirm Authorisation Requirements Met Comments Programme Amount Total Amount	Pre-populated Pre-populated Choose Cash Payment from the dropdown list (this is pre-populated) Pre-populated If required, choose from the dropdown Check this box Put any comments you wish here Pre-populated Pre-populated
5		Select Save	Save	
6		Select Supporting Documents	Supporting Documents	
7		Select Add New	Add New	
8		Select Browse	Browse...	
9		Select File from default directory		Locate file already saved previously
10		Select Open		
11		Select Save	Save	
12		Select Back	Back	
13		Select Payment Claim	Payment Claim	
14		Select Internal Authorise or Internal Reject dependent on which action you wish to take.	Internal Authorise Internal Reject	
15		A comments box will be presented for you to input any comments you have for the SG Finance Team.	Enter Internal Authorise Comment	
16		Select Confirm once you have input your comments or select Cancel if you do not wish to proceed. If you select Internal Authorise and Confirm, this Payment Claim will be sent to the SG Finance Team for payment.	Confirm Cancel	
17		Select Log out	LOGOUT	

How the SG Adaptations Team can authorise a Payment Claim

Step	User	Step Description	Input Field	Input Data
18	This element of the process can't be carried out due to it being a training link and the user not being available.	Log on to the system		
19		Select Finance from the left hand Menu Bar		
20		Select Adaptations Awaiting Area Team Check from the menu		
21		Select Edit against the Payment Claim previously created.	Edit View	
22		Select Authorise or Reject dependent on which action you wish to take.	Authorise Reject	
23		A comments box will be presented for you to input any comments you may have.	Enter Authorise Comment	
24		Select Confirm once you have input your comments or select Cancel if you do not wish to proceed. If you select Authorise and Confirm, this Payment Claim will be sent to the Finance Team for payment	Confirm Cancel	
25		Select Log out	LOGOUT	


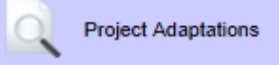
How the SG Finance Team can authorise a Payment Claim

Step	User	Step Description	Input Field	Input Data
26	As steps 17-23 cannot be carried out, this element of the process can't be carried out in the Training area, internal to SG in any case	Log on to the system		
27		Select Payment Claims - (your payment will be in one of the Finance Worklists) from 'Items requiring your attention'. This will be dependent on any payment controls put in place.	Items requiring your attention Payment Claims - Awaiting Random Finance Check (1) Payment Claims - Payment Threshold Breached (6) Finance Receipts (53) Project Change Requests (15)	
28		Select Edit against the Payment Claim previously created. You may have to go into a different page using the page control buttons on the top and bottom of the Project Funding Offer list	Edit View	
29		Select Authorise, Reject, Rework Required dependent on which action you wish to take.	Authorise Reject Rework Required	
30		A comments box will be presented for you to input any comments you have for the Applicant.	Enter Authorise Comment	
31		Select Confirm once you have input your comments or select Cancel if you do not wish to proceed. If you select Authorise and Confirm, this Payment Claim will be sent for payment.	Confirm Cancel	
32		Select Log out	LOGOUT	

How to monitor the Adaptations Programme on HARP

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

General: The SG Housing Endorser will be able to view the Funding Requests for their Housing Associations. HARP will link Area Teams to their respective Housing Associations.

Step	User	Step Description	Input Field	Input Data
1	SG Housing Central Endorser - this can't be carried out in the training link as the user is not available. This element is for Read Only purposes.	Log on to the system		
2		Select Project from the menu		
3		Select Project Adaptations		

Internal training material is currently using Central User - in the live environment this will be the Housing Endorser but for internal training purposes HARP has been set up using the Housing Central Endorser to enable the link between user and housing association

How to carry out the review process of the Adaptation Funding on HARP

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

General: The SG Housing System Administrator will put a system message on HARP to highlight to Applicants when the Review process will take place and how to apply.

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.

How SG Housing can create a system message on HARP

Step	User	Step Description	Input Field	Input Data
1	SG Housing System Administrator - this can't be carried out in the training link as the user is not available. This element is for Read Only purposes	Log on to the system		
2		Select Admin Tasks from menu bar		
3		Select System Messages from the dropdown		
4		Select Add New at the top of the action column under title System Message List		
5		Enter the System Message Information noting the mandatory fields marked with an asterisk *	Title* Body* Expiry Date* Display Ordinal*	For example - RSL Adaptations Review This is where you will put in details for RSLs to submit their Adaptations Review Applications, including the closing date This is the expiry date of the message Check this box to ensure the message is displayed This will determine the message order if there should be more than one message displayed on HARP
6		Select Save		
7		Select Back		
8		Select Log out		

How an Applicant can submit an Adaptations Review Application on HARP (additional funding request)

Step	User	Step Description	Input Field	Input Data
9	Applicant Approver	Log on to the system		
10		Insert the number of the Project into the Quick Search fields (at the top right hand corner of the screen)		
11		Select Edit against the Project	Edit View	
12		Select Adaptations		
13		Select +Add New		
14		Enter Type of Adaptation and once saved additional fields will appear	Type of Adaptation*	General
15		Select Save		
16		Enter the remaining information.	Funding Awarded Expected Outturn Additional Funding Required	Not available for update Leave blank until you have been notified of your funding award Input the additional funding to the original funding request
17		Select Request Funding		
18		Select Logout from top right hand of the HARP screen		

How an Applicant can submit an Adaptations Review Application on HARP (notification of reduction in expected outturn)

Step	User	Step Description	Input Field	Input Data
19	Applicant Inputter, Endorser or Approver	Log on to the system		
20		Insert the number of the Project you previously created into the Quick Search field (at the top right hand corner of the screen)		
21		Select Edit against the Project	Edit	
22		Select Adaptations tab		
23		Select the relevant Adaptation from the list and select Edit	Edit	
24		Enter the Expected Outturn		
25		Select Save		
26		Select Back		
27		Log out		

How SG Housing can award further funding through the Adaptations Review process on HARP

Step	User	Step Description	Input Field	Input Data
28	SG Housing Endorser	Log on to the system		
29		Select Project from the menu bar		
30		Select Adaptation Allocation		
31		Select Edit against the funding request	Edit View	
32		Enter General Adaptation Information noting the mandatory fields marked with an asterisk *	Funding Requested Awarded Expected Outturn Additional Funding Required	Input the additional amount requested (this is essentially the same as 'Additional Funding Required' field) Input the funding you wish to award Input the expected outturn which will be the same amount as Funding Awarded Leave the amount input by the Applicant earlier
33		Select Save - this will now change the status of the request to Funding Awarded and you will now create a new Funding Offer for this amount		
34		Select Go To Project		
35		Select Funding Offers		
36		Select +Add New		
37		Enter remaining Funding Offer Information noting the mandatory fields marked with an asterisk*	Status* Project Funding Offer Template* Programme Amount Accepted OBO (on behalf of) Date Signed Copy Received	Pre-populated Pre-populated Enter the Funding Amount against the Programme Leave Blank No available for update at this point
38		Select Save		

39	Select View Documents		
40	Select File Details	File Details	
41	Select Open	<input type="button" value="Open"/>	
42	The document will now be open and can be edited. Once in the finalised format, select Save As and save this into your drive.		
43	Close Word		
44	Select Browse	<input type="button" value="Browse..."/>	
45	Select the saved document and click Open	<input type="button" value="Open"/>	
46	Select Save - the edited document will now be saved to the record	<input type="button" value="Save"/>	
47	Select Back	<input type="button" value="Back"/>	
48	Select Issue	<input type="button" value="Issue"/>	
49	A comments box will be presented for you to input any comments you have for the Applicant		
50	Select Confirm once you have input your comments or select Cancel if you do not wish to proceed. If confirmed this will send the Funding Offer through HARP to the recipient	<input type="button" value="Confirm"/> <input type="button" value="Cancel"/>	
51	Select Back	<input type="button" value="Back"/>	
52	Select Grant Planning Target	<input type="button" value="Grant Planning Target"/>	
53	The Funding Period will be pre-populated with the current Financial Year but can be changed via the dropdown		
54	Enter the Grant Planning Target Amount against the Programme - this will be the same amount as the Funding Offer Amount and will take into account the full award for that Financial Year, including any additional funding		
55	Select Save	<input type="button" value="Save"/>	
56	Select Back	<input type="button" value="Back"/>	
57	Take a note of the Project Reference Number from the top of the screen for later on in the process		

How an Applicant approves a Funding Offer on HARP

Step	User	Step Description	Input Field	Input Data
58	Applicant Approver	Log on to the system		
59		Select Project Funding Offers from the 'Items requiring your attention' list		
60		Select Edit against the Funding Offer. You may have to go into a different page using the page control buttons on the top and bottom of the Project Funding Offer list	<input type="button" value="Edit"/> <input type="button" value="View"/>	
61		View Document to check it is acceptable.	<input type="button" value="View Document"/>	
62		Select Approve or Reject	<input type="button" value="Approve"/> <input type="button" value="Reject"/>	
63		A comments box will be presented for you to input any comments you have for SG.		
64		Select Confirm once you have input your comments or select Cancel if you do not wish to proceed	<input type="button" value="Confirm"/> <input type="button" value="Cancel"/>	
65		Select Logout from top right hand of the HARP screen	<input type="button" value="LOGOUT"/>	
66		The Applicant should let SG know via letter or email that they have accepted the funding award.		

How the Housing Endorser updates the signed copy Funding Offer on HARP

Step	User	Step Description	Input Field	Input Data
67	SG Housing Endorser	Log on to the system		
68		Insert the number of the Project into the Quick Search fields (at the top right hand corner of the screen)	<input type="text" value="Quick Search (Project Reference Number)"/>	
69		Select Edit against the Project	<input type="button" value="Edit"/> <input type="button" value="View"/>	
70		Select Funding Offers tab	<input type="button" value="Funding Offers"/>	
71		Select Edit against the Funding Offer previously created	<input type="button" value="Edit"/> <input type="button" value="View"/>	
72		Update Date Signed Copy Received with relevant date using the calendar box provided.	<input type="text" value="Date Signed Copy Received"/> <input type="button" value="Calendar"/>	
73		Select Save	<input type="button" value="Save"/>	
74		Select Back	<input type="button" value="Back"/>	
75		The status of the Project Funding Offer is now Approved which has updated the status of the Project to Live. This will allow payments to be created against it.		
76		Log out	<input type="button" value="LOGOUT"/>	