

Introduction to NEC Housing Customer Services User Guide

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1. Getting Started with NEC Housing

1.1 Logging in to the NEC Housing System

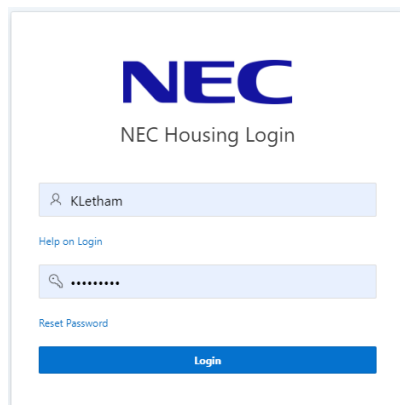
To log in to the NEC Housing system, do the following:

1. Navigate to the NEC Housing site.

Tip:

If you do not know what the URL is for the **NEC Housing Login** page, please contact your system administrator.

The **NEC Housing Login** page appears.



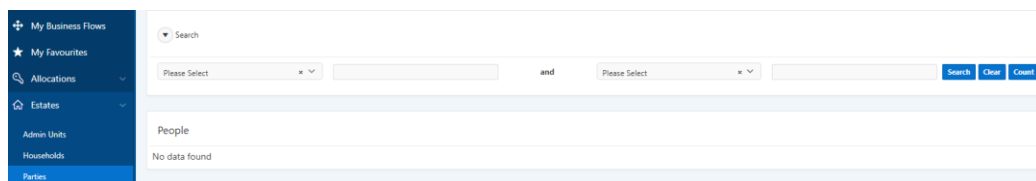
2. Enter your Username and Password.

Tip:

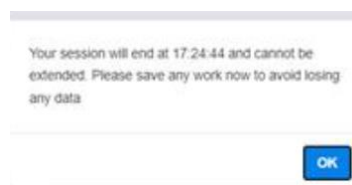
If you do not know what your username is, or have forgotten your password, please contact your system administrator before proceeding further.

3. Click **Login**.

You are now logged in to the NEC Housing system.



Please note that the system will log you out after 8 hours, you will receive a message similar to this to give you notice.



1.2 System Preferences

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

For example, you can:

- Choose a different theme.
- Change the date format.
- Update your user profile information.

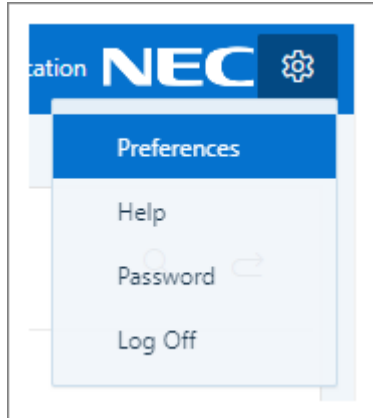
Note:

The availability of this page and some of the fields on it is determined by your user credentials. If you do not have access to it, please contact your system administrator for advice.

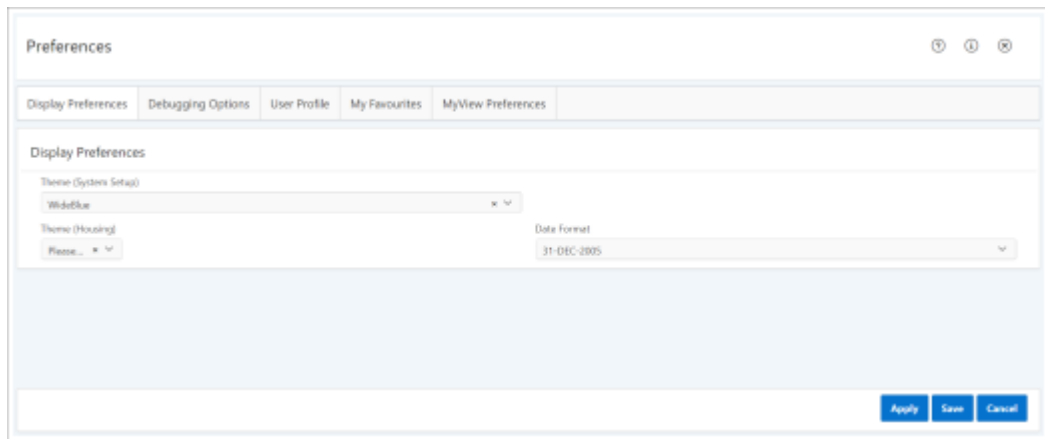
Setting Your System Preferences

To complete this task, perform the following steps:

1. Access the **Housing** menu.
2. Click the system menu icon  in the top right-hand corner of your screen. A menu appears.
3. Select **Preferences**.



The **Preferences** page appears.

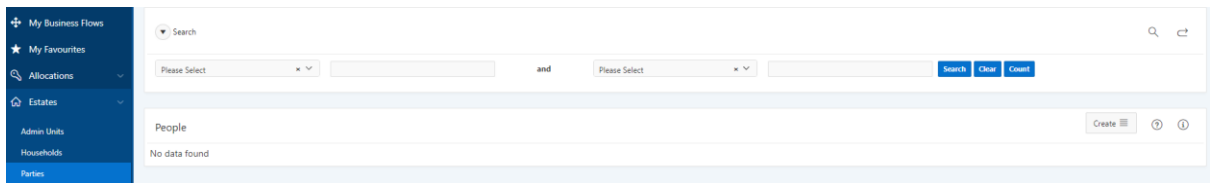



4. Set your preferences.
5. Click **Save**.
 The main NEC Housing screen reappears.

Your system preferences have been set.

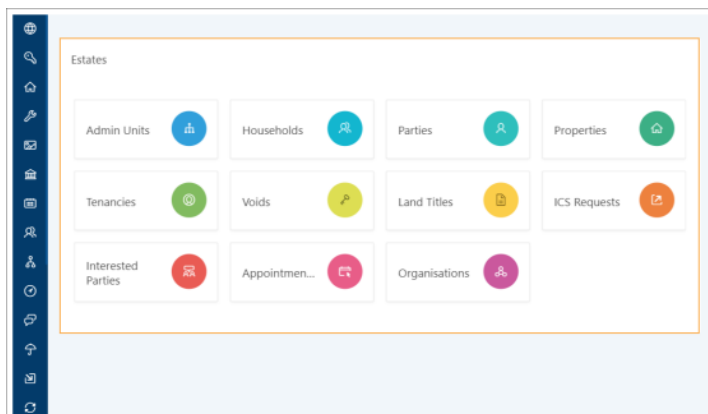
1.3 Navigation Pane

The **Navigation** pane is used within NEC Housing to access different areas of the application.



When the navigation pane is collapsed, by clicking  and only icons remain, you can click on the icons to access the different product areas.

Instead of the navigation pane expanding to show sub-menu options, business areas will appear in the form of cards on the product area landing page. Each card on a touch screen device will act like a button that can be selected.



2. About the NEC Housing System

2.1 Key Terms

Advanced Search Form

An advanced search form is usually accessed directly from the quick **Search** area at the top of a summary page. These types of forms allow you to find records using more sophisticated search criteria than that available in the quick **Search** area.

Bubble Text

The text displayed by the system when you hold your mouse over an icon or column heading to provide further information.

Bulk Actions Lists

A drop-down list of available actions. These are displayed in the table heading with a region.

Selecting an action from one of these lists will open a form, a wizard, a new page, a details page, or message box.

Business Area

A business area provides direct access to the functionality available within the selected product area.

For example, the Estates product area enables you to access the Admin Units, Households, Parties, Properties, Tenancies and Voids business areas.

Details Page

A details page is used to collate additional information about the record selected from a summary page. Pages of this type usually contain several regions.

Field

A box used to enter a single item of data such as a person's title or surname.

Form

A pop-up window accessed from a region used to gather new data or update existing data.

Form Banner

This displays the form name and provides access to the online help for that form and information about the region itself.

Form Menu

This runs across the bottom of the form. Through a series of buttons, it provides a means of saving or cancelling the record you are working on.

Link

An active element of the user interface (usually text) which when clicked takes you to another part of the system.

Page

A page is the area of your screen within a business area that is used to display information and access data entry forms.

Product Area

A product area provides high level access to the business areas available from a system area.

For example, Estates, Rents, and Allocations are all product areas available from the Housing system area.

Quick Search

An area displayed at the top of each summary page that enables you to enter a limited amount of search criteria relevant to the business you are using. It can also provide access to the advanced search form for that area.

Record

A set of related fields for example, the full name or address of a person. These are often displayed in rows within a region.


Region

A defined area on a page used to display existing records.

Region Banner

This displays the region name and provides access to any actions available from that region, the online help for that region and information about the region itself.

Row Action Lists

A drop-down list of available actions. These are displayed at the end of individual record rows in a region by clicking  icon. Selecting an action from one of these lists will open a form, a new screen, a details page, or message box.

Summary Page

The summary page is the first page that appears when you select a business area. It enables you to find the data you are interested in and in some instances, provides the facility to create new records.

System Area

For ease of use, the system is divided into several different areas, namely Housing, System Setup, Task Manager, and GPI.

System Message

A pop-up message advising you of something important, such as missing data, a system error or to alert you to a particular piece of information that you need to be mindful of regarding the currently selected record.

System Setup Page
















These pages can only be accessed from the System Setup menu. They usually contain several regions from which you can set up and maintain the system reference data.












Wizard








A collection of forms used to gather data in a systematic way.

Unlike the pop-up forms accessed from regions, you progress through wizard forms in a sequential order by clicking **Next** at the bottom of the wizard.





2.2 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

3. Access and View Data

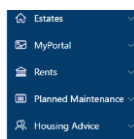
The NEC Housing system interface has several key areas namely:

Navigation Pane

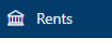
Appears on the left-hand side of the screen and can be hidden or displayed using the Expand / **Collapse Navigation**  icon at the top of the screen.

Product Areas


Appear as a list in the 'Housing Navigation' pane on the left-hand side of the screen. Each product area can be expanded or collapsed to display or hide the relevant business areas

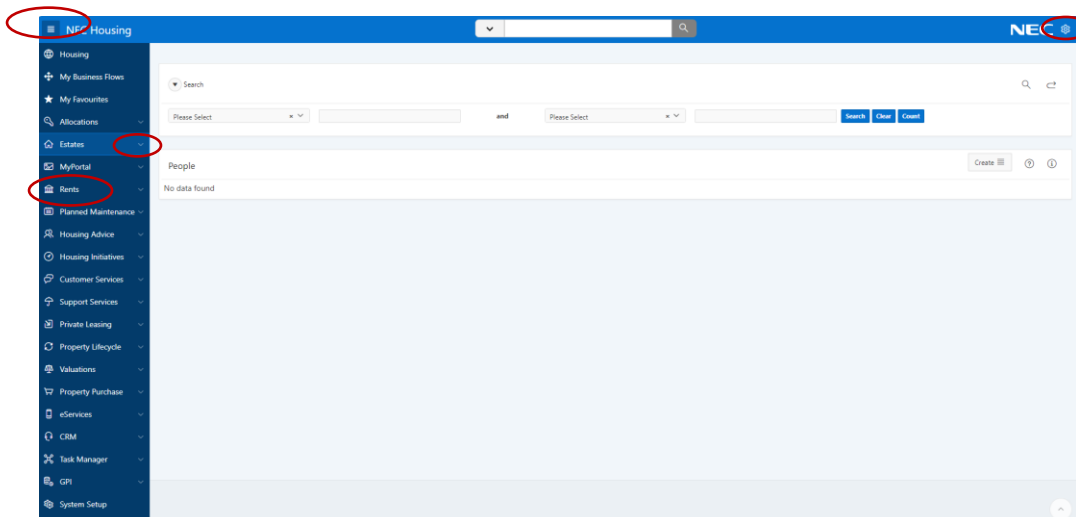


Business Areas

Appear below their respective product area  by clicking into this

System Menu

Enables you to access the **Preferences** page, change your password, call the online help, and log off the system. 

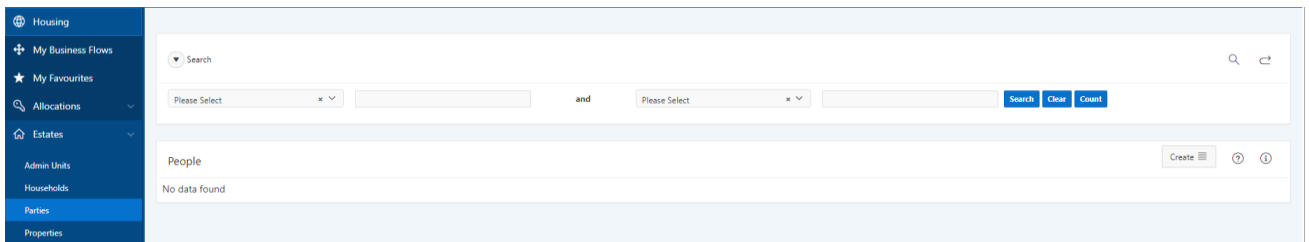


Summary Pages

Summary pages are used to find and view existing records or to access processes within a business area.

Every product area contains several business areas, each of which has a summary page. For example, you will be able to access one or more the following summary pages within **Estates** by clicking on the corresponding business area:

- Admin Units
- Households
- Parties
- Properties
- Tenancies
- Voids
- Interested Parties
- Appointments
- Organisations



Note:

The list of available business areas is determined by your job role, and it is not possible to view any records in a summary page region until a quick **Search** or **Advanced Search** has been performed.

Summary Page Regions

Summary pages only contain one region. They are used to display the records that meet your search criteria and provide access to the business processes available from the area you are working in.

Each alternating row of records inside the region is shaded a different colour to help with the visibility of the data.

By default, summary page regions are empty until you have performed a search. This can be done by using either the quick **Search** area at the top of the summary page or the **Advanced Search** which can be accessed using the link at the bottom of the quick **Search** area.

People													Create	?	!
Person Ref	Person Name	Contact Address	Date of Birth	Age	Gender	NI Number	Notepad	Sur	Dup						
6302	[Redacted]	[Redacted]	[Redacted]	3	F	-	N	N	-						
6300	[Redacted]	[Redacted]	[Redacted]	44	M	[Redacted]	N	N	-						
3376	[Redacted]	[Redacted]	[Redacted]	70	F	-	N	N	-						

When search results are displayed in the region you will be able to do one or more of the following:


- View a summary of the records.

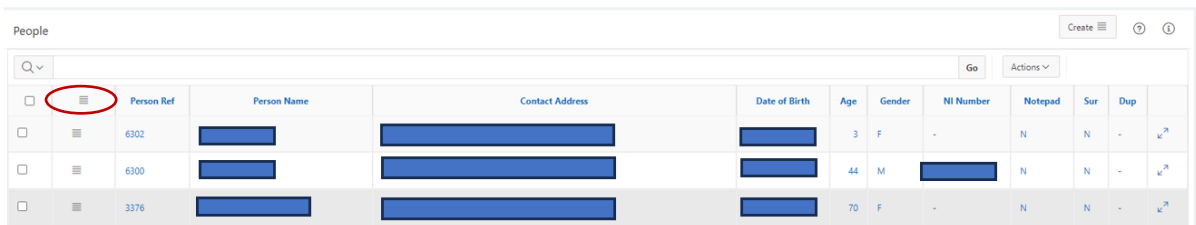
- Create a new record.
- Update an existing record.
- Access a details page (going into a record).
- Use the Interactive Report (in Actions top right).

Access a Details Page


Access detail pages where you can view and maintain selected records.

You do this in one of two ways:

- To select multiple records, check the boxes corresponding to the records you require then select the details page option from the **Bulk Actions**  list in the table heading.



<input type="checkbox"/>	Person Ref	Person Name	Contact Address	Date of Birth	Age	Gender	NI Number	Notepad	Sur	Dup
<input type="checkbox"/>	6302	[REDACTED]	[REDACTED]	[REDACTED]	3	F	-	N	N	-
<input type="checkbox"/>	6300	[REDACTED]	[REDACTED]	[REDACTED]	44	M	[REDACTED]	N	N	-
<input type="checkbox"/>	3376	[REDACTED]	[REDACTED]	[REDACTED]	70	F	-	N	N	-

- To select a single record, select the details page option from the corresponding **Row Action** list .



<input checked="" type="checkbox"/>		6302	[REDACTED]	[REDACTED]	[REDACTED]	3	F
-------------------------------------	---	------	------------	------------	------------	---	---

4. Searches

4.1 Searching Property Details

Click:

- Estates
- Properties
- Search (basic or advanced search)
- Search for the address

Property Search ↩ ? ⓘ ✕

▶ Property Details

▼ Address Details

Sub Building

Building Number

Sub-Street

Street

Town

Area

Postcode

Country

▶ Alloc Prop Type

▶ Elements

▶ Freeholder Details

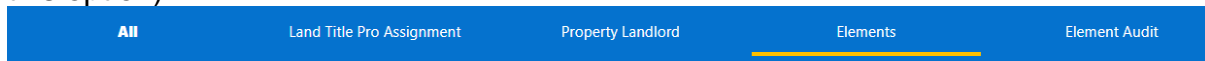
▶ Other Fields

Save and Search
Save
Search
New Query
Count
Cancel

- Select the property by clicking on it

		Reference	Property Address	Type	Sub Type	Res	Ntp	Status	Status Date	
<input type="checkbox"/>	☰	132039255	<div style="background-color: #0056b3; width: 100px; height: 15px;"></div>	SDH		Y	N	OCCP	14-Jan-2019	↗

Click 'Elements' in the top banner of the screen (you may need to click 'More' to see this option):



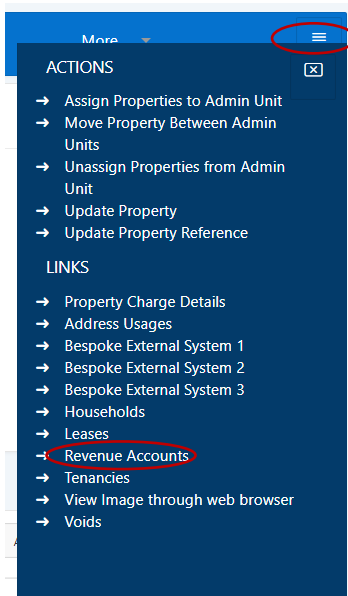
The associated table will detail the different elements of the property such as area and property type

		Code	Description	Attribute	Further Attribute	Start Date	End Date	Location	
🔍	☰	BEDS	No of beds	3	NUL	01-Apr-2019	-	PRO	🔗
🔍	☰	DWELLING	Dwelling type	SDH	NUL	01-Apr-2018	-	PRO	🔗
🔍	☰	NEEDS_TYPE	Needs Type	NT_GEN	NUL	01-Apr-2019	-	PRO	🔗
🔍	☰	RENT_52W	52W Rent Charge	301.60	NUL	04-Dec-2023	-	PRO	🔗
🔍	☰	LAR	Lettings area elements	1D BDEN CR	NUL	01-Apr-2019	-	PRO	🔗
🔍	☰	HEATING	Heating Type	HEAT_GAS	NUL	01-Apr-2019	-	PRO	🔗
🔍	☰	YEAR_BUILT	Year built	2002	NUL	01-Apr-2019	-	PRO	🔗
🔍	☰	HL_PROP	Homeless Property	YES	NUL	19-Jun-2023	-	PRO	🔗

4.2 Searching for a Rent Account

You can search for a rent account using the address, person's name or account number.

From the property element page (above) you can access the rent account details by clicking on the row action at the top right of the screen and selecting 'revenue accounts'

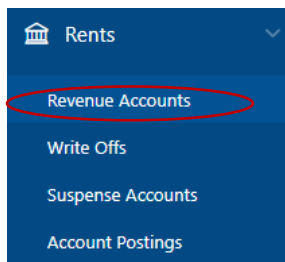


You will then see a list of all transactions

	Period	Tran Date From	Effective Date From	Tran Type	Subtype	Debit	Credit	Balance
▲	38	19-Feb-2024	18-Dec-2023	DRS	-	301.60	-	-1,159.71
-	30	13-Feb-2024	23-Oct-2023	HBS	-	-	301.60	-1,461.31
-	37	10-Dec-2023	11-Dec-2023	HBS	-	-	301.60	-1,159.71
▲	37	10-Dec-2023	11-Dec-2023	DRS	-	301.60	-	-858.11

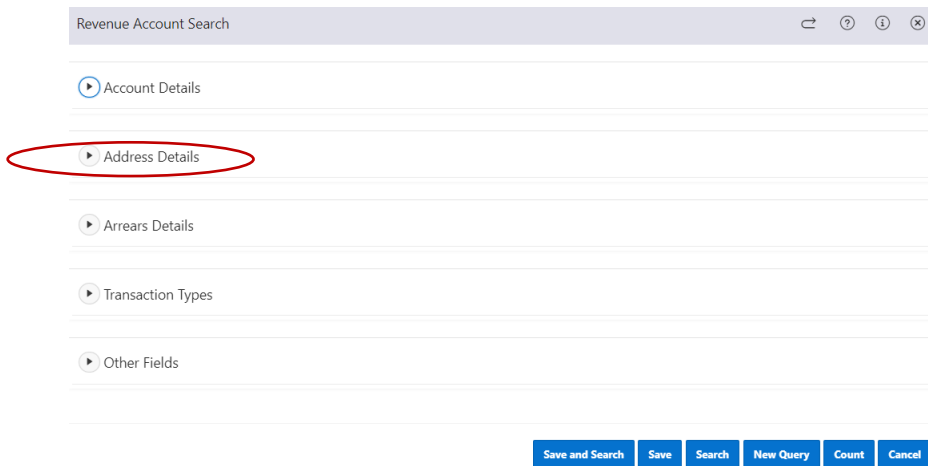
You can also search for a rent account from the left of the home page by clicking:

- Rents
- Revenue Accounts



- Search (basic or advanced search)
- Search for the address or person

To search using the **address**, select 'address details' in advanced search



Type the address and click search and select the account

	Payment Reference	Tenants Name	Address	Start Date	Last Arrears Action	Account Type	Current Balance	Current Account Ind
□	5901452770			14-Jan-2019	ARC	REN	-1,159.71	Y

You will then see a list of all transactions

		Period	Tran Date From	Effective Date From	Tran Type	Subtype	Debit	Credit	Balance	
▲	☰	38	19-Feb-2024	18-Dec-2023	DRS	-	301.60	-	-1,159.71	↕ ↗
-	☰	30	13-Feb-2024	23-Oct-2023	HBS	-	-	301.60	-1,461.31	↕ ↗
-	☰	37	10-Dec-2023	11-Dec-2023	HBS	-	-	301.60	-1,159.71	↕ ↗
▲	☰	37	10-Dec-2023	11-Dec-2023	DRS	-	301.60	-	-858.11	↕ ↗

To search using a **name**, select 'account details' in advanced search

Revenue Account Search ↶ ? ⓘ ✕

▶ Account Details

▶ Address Details

▶ Arrears Details

▶ Transaction Types

▶ Other Fields

Save and Search Save Search New Query Count Cancel

Check the correct account box is ticked at the top

▶ Account Details

Current Accounts Closed Accounts Cancelled Accounts

From here you can also search on the account number if you have it or scroll down to the name section

Forename

Surname Prefix

Surname

Click search and select the account

<input type="checkbox"/>	☰	Payment Reference	Tenants Name	Address	Start Date	Last Arrears Action	Account Type	Current Balance	Current Account Ind	
<input type="checkbox"/>	☰	5901452770			14-Jan-2019	ARC	REN	-1,159.71	Y	↕ ↗

Select 'Transactions' from the top banner (you might need to click on 'more' to see this), you will then see a list of all transactions

	☰	Period	Tran Date From	Effective Date From	Tran Type	Subtype	Debit	Credit	Balance	
▲	☰	38	19-Feb-2024	18-Dec-2023	DRS	-	301.60	-	-1,159.71	↕ ↗
-	☰	30	13-Feb-2024	23-Oct-2023	HBS	-	-	301.60	-1,461.31	↕ ↗
-	☰	37	10-Dec-2023	11-Dec-2023	HBS	-	-	301.60	-1,159.71	↕ ↗
▲	☰	37	10-Dec-2023	11-Dec-2023	DRS	-	301.60	-	-858.11	↕ ↗

4.3 Inexact Search Criteria

You can use wildcards in your search criteria where the exact criteria are unknown.

Using the Percent (%) Sign

The percent sign represents any number of characters. For example:

STEVEN%	Could retrieve STEVEN or STEVENS or STEVENSON or STEVENTON.
STE%EN	Could retrieve STEVEN or STEPHEN or STEFFEN
%MOUTH	Could retrieve EXMOUTH or PORTSMOUTH or SIDMOUTH

Using the Underscore (_) Sign

The underscore sign represents a single character. For example:

2_	Could retrieve 20 - 29 and 2a, 2b
3_ _	Could retrieve 300 - 399 and 30a, 30b
ME _ _	Could retrieve MERR or MEAR or MEIR