NEC Housing User Guide Finance 2

Contents

1. Getting Started with NEC Housing

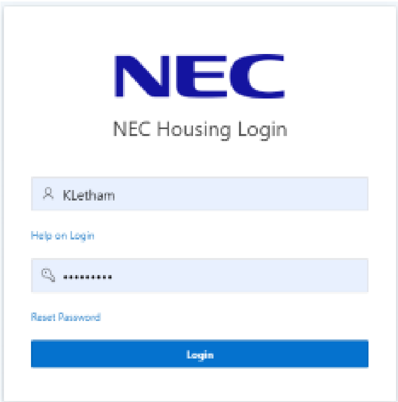
1.1 Logging in to the NEC Housing System

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.

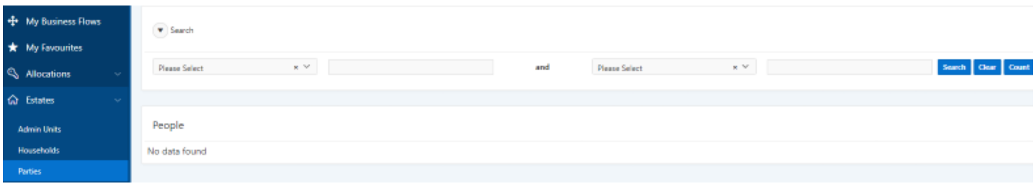
   The **NEC Housing Login** page appears.



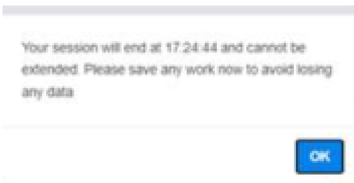
2. Enter your Username and Password.

   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:

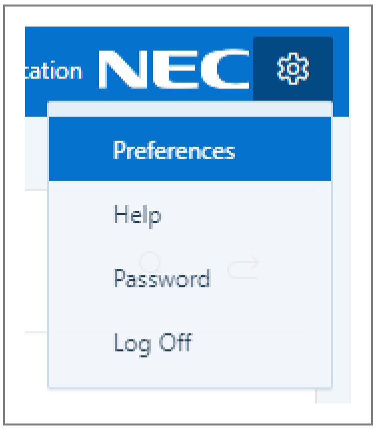
- Choose a different theme.
- Change the date format.
- Update your user profile information.

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.

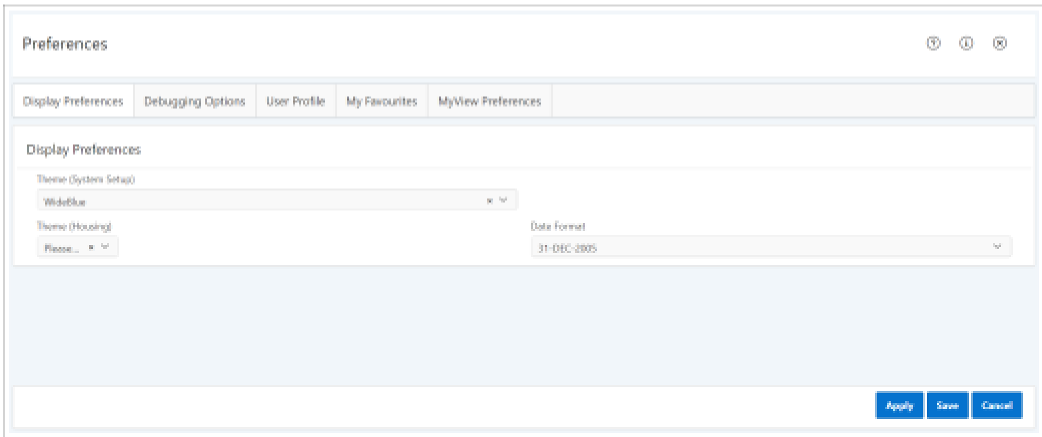
Setting Your System Preferences

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.

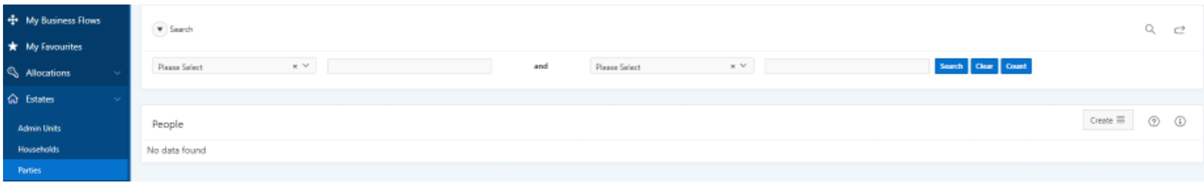


4. Set your preferences.
5. Click **Save**.
   The main NEC Housing screen reappears.

Your system preferences have been set.

1.3 Navigation Pane

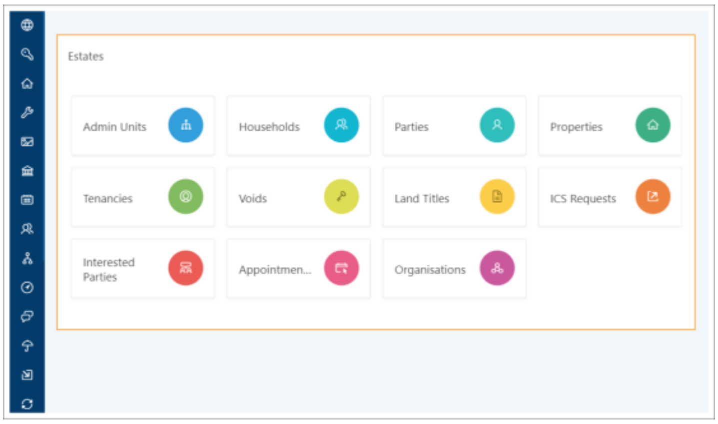
The **Navigation** pane is used within NEC Housing to access different areas of the application.



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

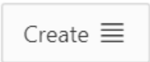
These pages can only be accessed from the System Setup menu. They usually contain several regions from which you can set up and maintain the system reference data.

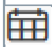
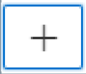
Wizard

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

2.3 Security

Access to business areas, pages, regions, forms, and actions is controlled by job role security.

It is therefore possible that some of functions you'll see in this manual may not be available to you in your role within your organisation.

3. Access and View Data

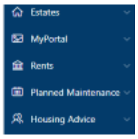
The NEC Housing system interface has several key areas namely:

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

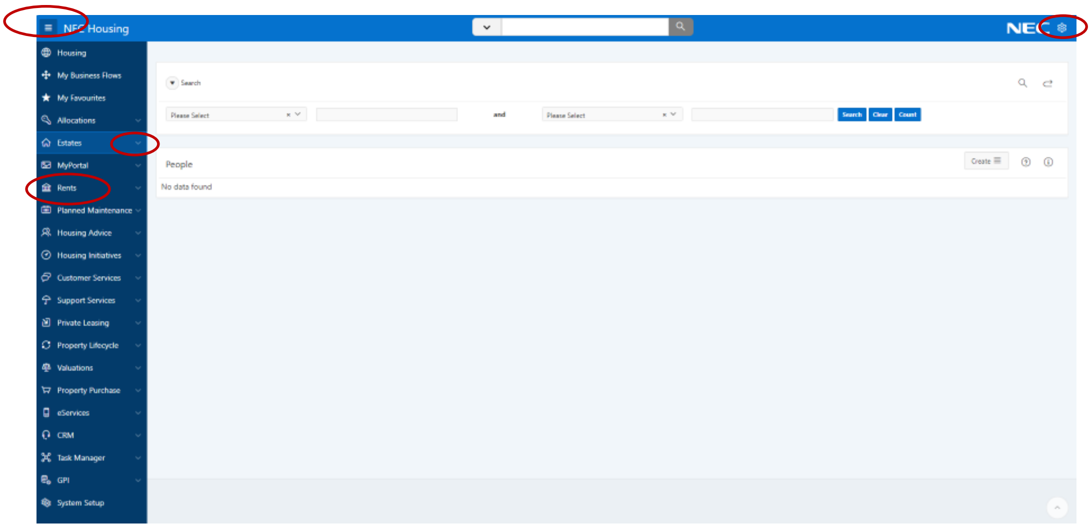


Business Areas

Appear below their respective product area Rents 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. NEC

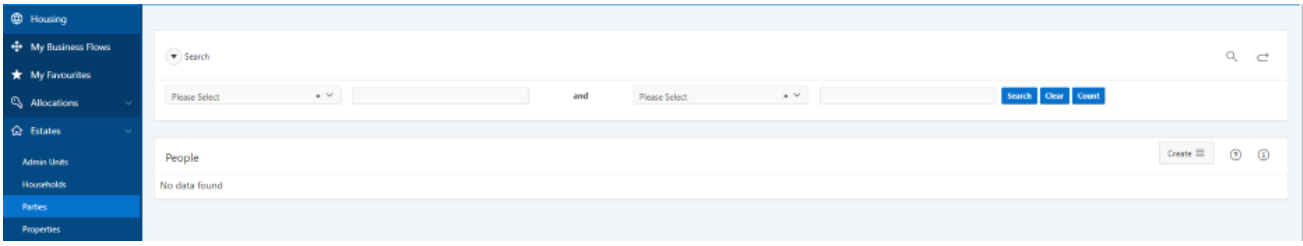


3.1 Summary Pages

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



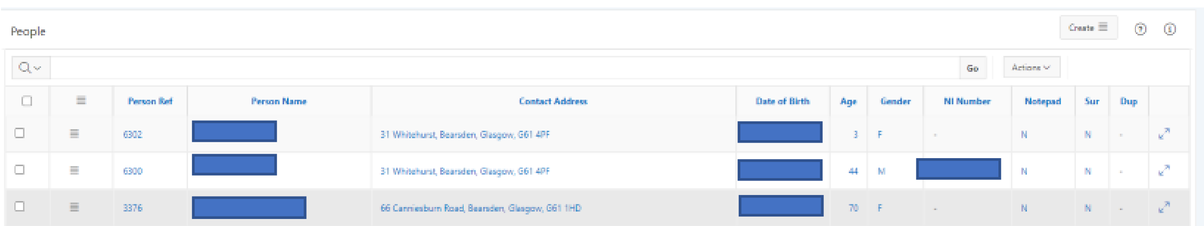
Note:
The list of available business areas is determined by your job role, and it is not possible to view any records in a summary page region until a quick **Search** or **Advanced Search** has been performed.

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.



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.

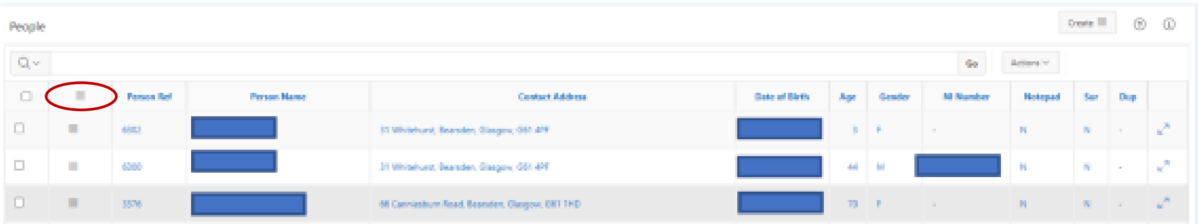
- Create a new record.
- Update an existing record.
- Access a details page (going into a record).
- Use the Interactive Report (in Actions top right).

3.2 Access a Details Page

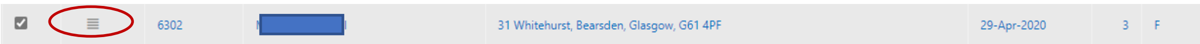
Access detail pages where you can view and maintain selected records.

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.



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

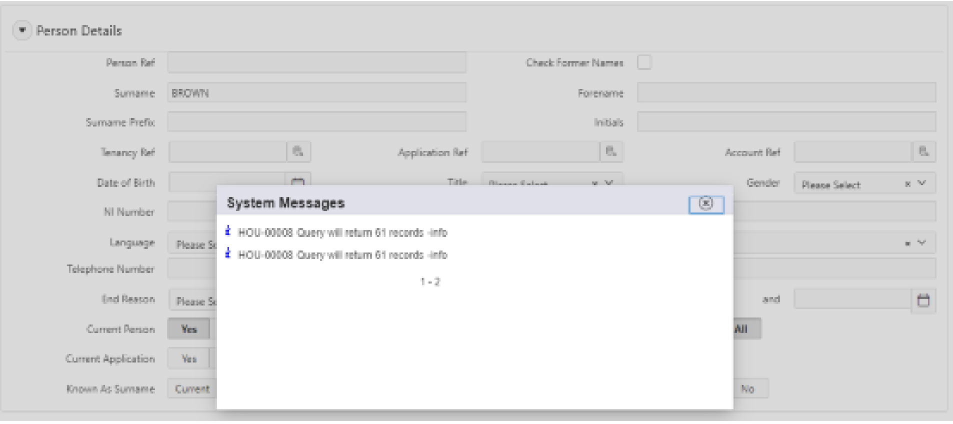


3.3 Records

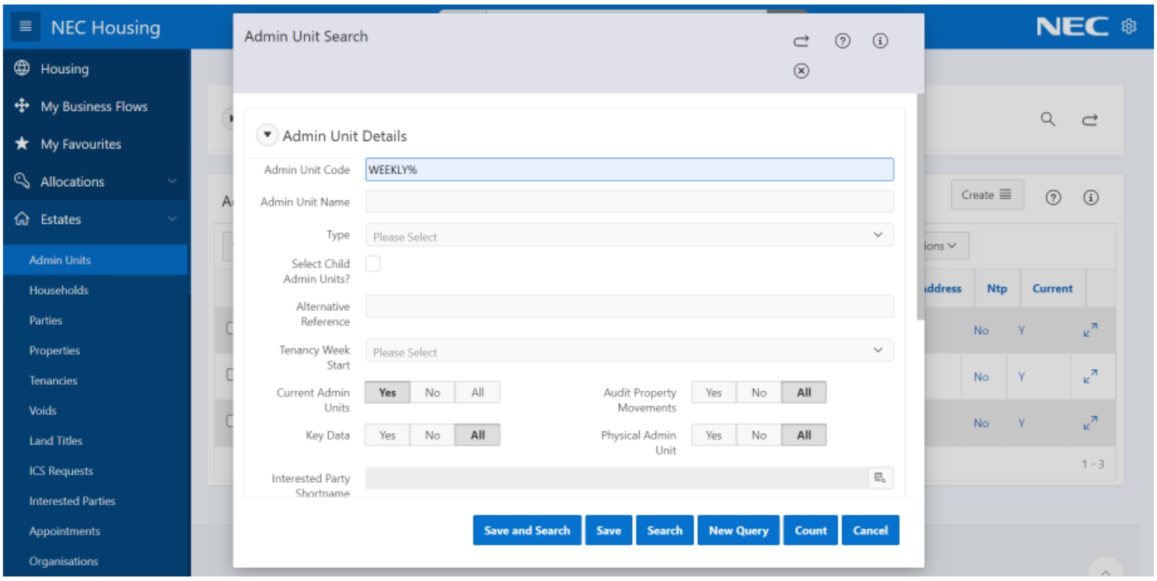
Counting Records

If you are unsure how many records will be returned using the advanced search criteria you have entered, you can check this by clicking **Count**.

A system message will appear containing the number of records that will be returned using the existing search criteria.



Wildcards can be used when entering search criteria if you are unsure of the criteria you want to enter.



View a Brief Summary of the Records

The records that meet your search criteria are displayed as a report within the region. Each row of the report contains brief details of one record.

You can use the **Next** and **Previous** icons in the bottom right-hand corner of the region to scroll through the results when the number of records returned by the search exceeds the page limit specified by your system administrator.

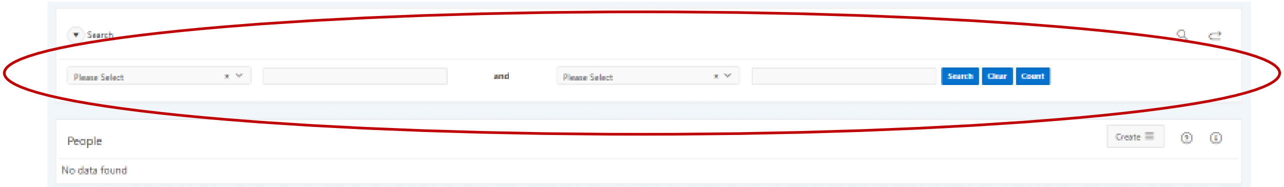
In addition, you can obtain further information about an individual record by clicking the **Expand** icon at the end of the corresponding row to display hidden fields.

You can click the Actions icon at the top of the region then download and click **Excel** icon to export the records to Microsoft Excel. There is a limit of 200,000 records that can be downloaded to your device.

4. Searches

4.1 Finding Records (Quick Search)

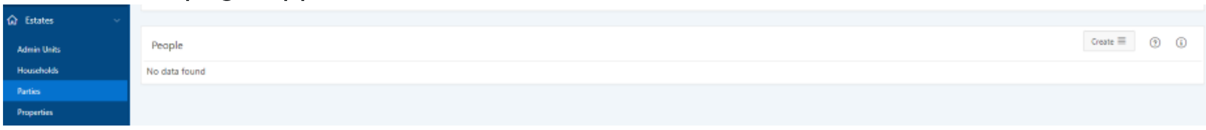
The **Quick Search** appears above the region on each of the summary pages within a product area, it enables you to select the type of data and enter the criteria you want to use to find a record. It is used to populate summary page regions with the records that meet your search criteria.



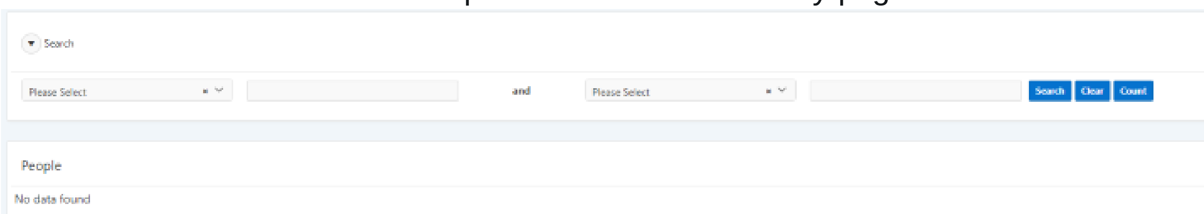
When you first access the default summary page within any product area if you want to view existing records you will need to retrieve them first. This is done by selecting search filters and entering your search criteria in the **Quick Search**.

For example, if you wanted to find a person named 'John Smith', you would do the following:

1. Click **Estates** .
   The **Estates** menu expands.
2. Click **Parties**.
   The **Parties** page appears.

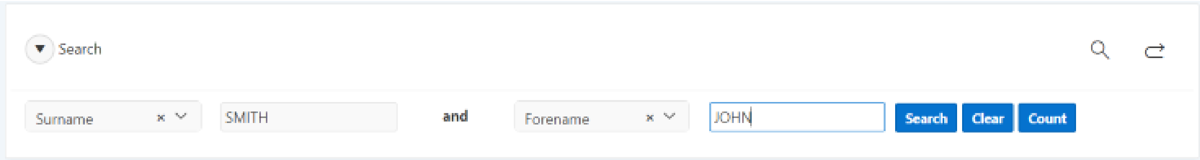


3. Locate the **Search** area at the top of the **Parties** summary page.

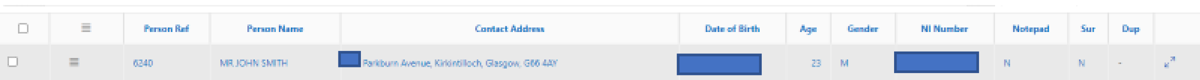


4. Select Surname from the first ‘Please Select’ list in the **Search** area.
5. Enter SMITH in the second field.
6. Select Forename from the ‘Please Select’ list in the third field of the **Search** area.

7. Enter JOHN in the fourth and final field.

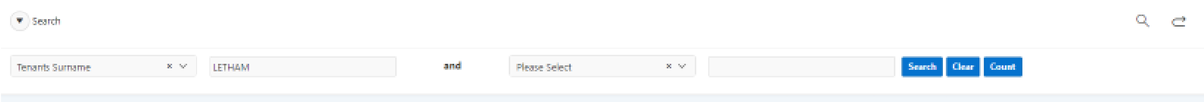


8. Click **Search**.
   All people with the name ‘John Smith’ will be returned to the **People** region on the **Parties** summary page.



4.2 Searching for Transactions on a Rent Account

1. Click **Rents**.
   The **Rents** menu expands.
2. Click **Revenue Accounts**.
   The **Revenue Accounts** page appears.
3. Locate the **Search** area at the top of the **Revenue Accounts** summary page.



4. Select Surname from the first ‘Please Select’ list in the **Search** area.
5. Enter the tenants surname and **Search.**
6. Select the account.
7. Click the ‘More’ dropdown at the top of the page
8. Select **Transactions**

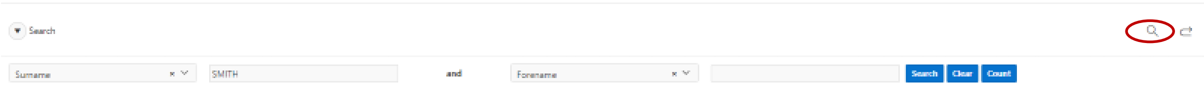
A list of all transactions will be shown.

If the **Quick Search** doesn't provide you with enough filters, use the **Advanced Search** where available.

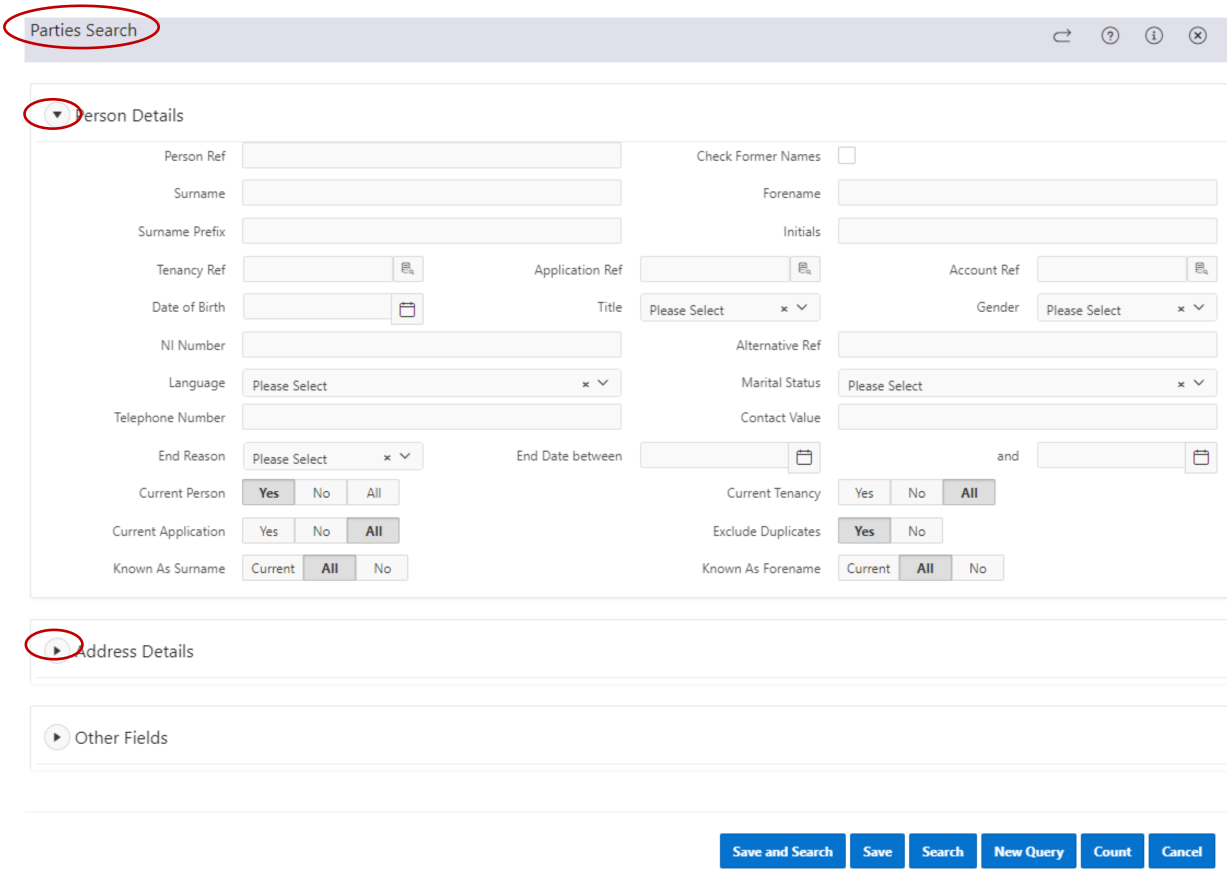
4.3 Carrying Out an Advanced Search

If the options available from the 'quick' **Search** drop-down lists do not meet your needs, you can use the advanced search feature. Advanced searches give you the ability to enter a wide range of search criteria to search the system and return only those records that fulfil the criteria specified.

The facility for advanced searches depends on the functional area you are working in. When it isn't available, the **Advanced Search** icon will not be visible in the quick **Search** area.



Advanced searches can contain several search areas depending on which functional area they are accessed from. When you access an advanced search, the default search area will be open displaying the search criteria available in that area.



You can then use the **Close** icon and **Open** icon to close and open any additional areas that you want to enter further search criteria in. All search areas contain specific search criteria relating to the functional area you are in. You can use the criteria to restrict the number of records returned by the search results.

When you submit a search from an advanced search form, the system returns you to the summary page you accessed it from. The summary page will display any results that meet your search criteria in the region of that summary page.

If no records meet your criteria, you will see the message 'No data found' instead.

Example:

1. Click **Estates**.
   The **Estates** product area appears.
2. Click **Properties**.
   The **Properties** business area summary page appears.
3. Click the **Advanced Search** icon in the **Search** area at the top of the screen.
   The **Property Search** form appears.
4. Enter your search criteria in the **Property Search** form.
5. Click **Search**.
   The form closes and you are returned to the summary page.

The records that meet your search criteria are displayed in the **Properties** region.

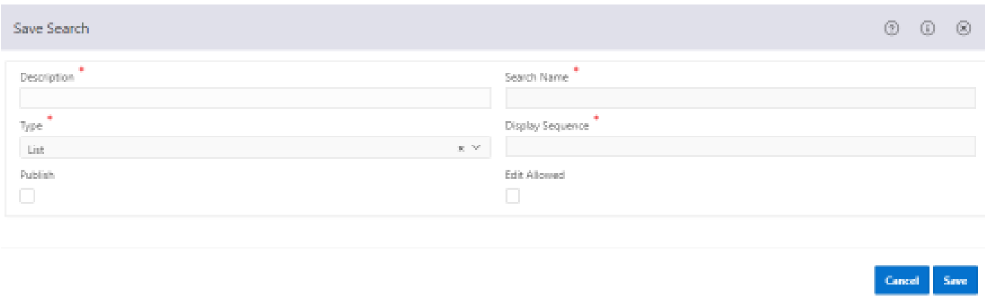
4.4 Search Results

When you run either a quick search or an advanced search, the results are displayed in the region from which the search was called.

There is no restriction on the number of records that can be returned to the region. If many records are returned, use the **Next** icon to scroll to the next page of results.

4.5 Saving Your Search Criteria

If you often enter the same criteria when searching for records, you can click the **Save and Search** button at the bottom of the form. This will open the **Save Search** form where you can save the criteria, allowing you to access it again at a later date.



If you have created a saved search or there are saved searches that have been published by other users, the **Saved Search** icon will be displayed in two places:

- In the quick **Search** area on the summary page.
- At the top of the advanced search.

When clicked, the saved searches will appear in a list or grid format (depending on the type of saved search) and you will be able to select the one that suits your needs.

When selected, the search criteria will be imported into the advanced search form and populate the relevant fields. From here you will be able to execute the search and/or amend the search criteria. If you amended the criteria, you will also be able to save it under a new name.

Example:

1. Access the **Admin Unit Search** form.
2. Enter your search criteria in the **Admin Unit Search** form.
3. Click **Save and Search**.
   The **Save Search** form appears.
4. Enter the relevant data in the form.
5. Click **Save**.
   The form closes and you are returned to the **Admin Units** summary page.

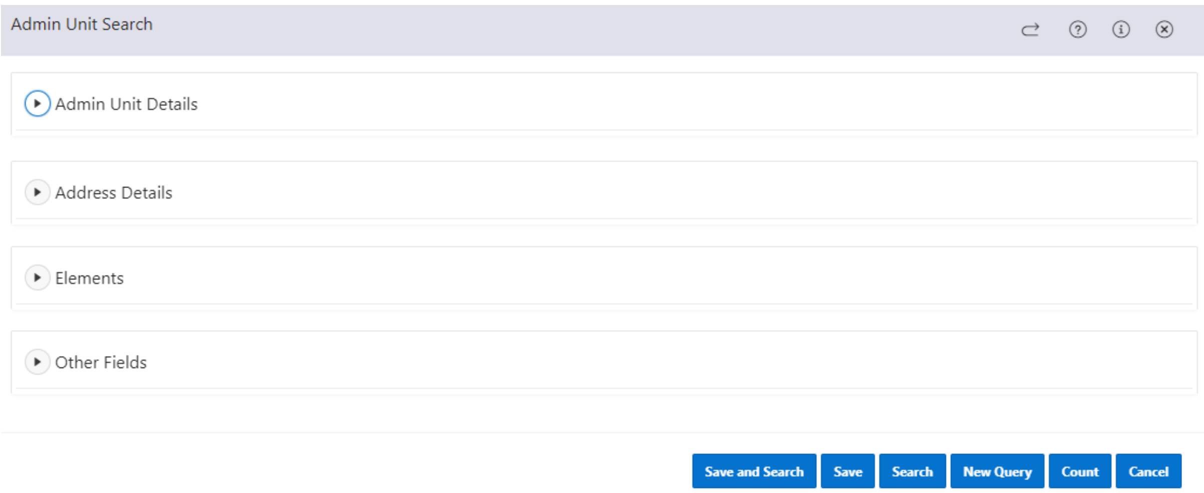
Your search has been saved and you can now click **Search** to find the records you are looking for.

You can access this saved search later, either by:

- Returning to the **Admin Units** summary page and clicking the **Saved Search** icon in the quick **Search** area or
- Accessing the **Admin Units Search** form and clicking the **Saved Search** icon at the top of the form.

4.6 Clearing Search Criteria

If you have entered search criteria and decide to change it, you can do so by clicking **New Query**. This will remove all existing criteria in the advanced search, and you can then enter alternative criteria.



4.7 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

5. Using the NEC Housing System

5.1 Using the Actions

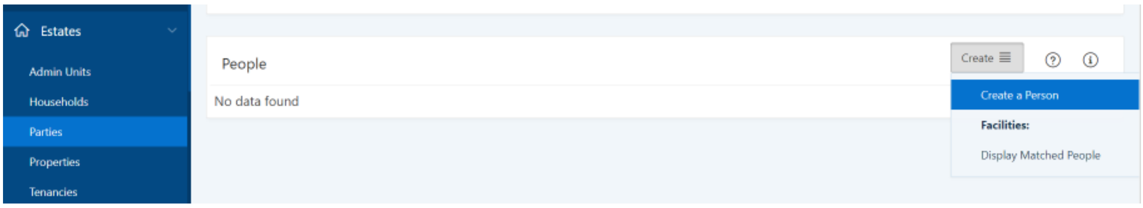
The Action lists provide access to the various tasks you can carry out from a region. The actions available from these are determined by several factors such as the status of the selected record, other system restraints, or your job role.

There are three types of commonly used actions:

Create Actions

Create actions are commonly used to create a new record, such as a new party, tenancy, or property.

These actions are displayed in a drop-down list when you click the **Create** ≡ list at the top of a region.



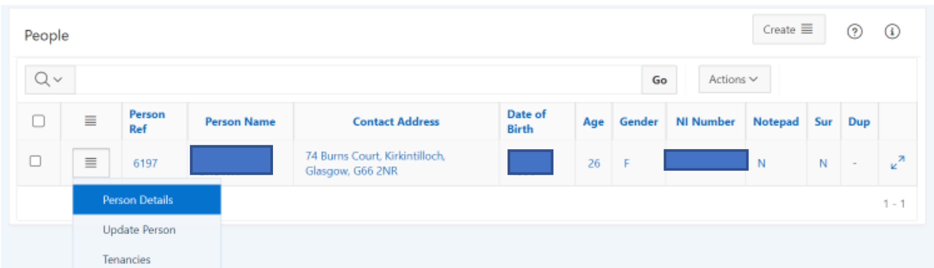
Click the action to open the form you need to create the new record.

Row Actions

Row actions are used to access the forms you need to maintain existing records. Some of the commonly used row actions will enable you to update or delete a record. However, row actions can, among other things, also be used to access a details page and run context reports.

To a use a row action:

1. Find and retrieve at least one record.
   Once data is displayed in a region the row actions will be available.
2. Click the **Row Action** ≡ list in the second column of the region.
   The list of available actions appears.



3. Select the action that opens the form you need to maintain the corresponding record.

Note:
The actions available only apply to the record in the corresponding row which, in this example, would be the Rents Central (RCEN) admin unit.

Bulk Actions

Bulk actions enable you to manage multiple records simultaneously. They are commonly used to gather records from a summary page and take them through to a details page.

To do this:

1. Find and retrieve two or more records.
   Once data is displayed in a region the bulk actions will be available.
2. Check the selection boxes in the first column of the region that correspond to the records you want.
3. Click the **Bulk Actions** list ≡ at the top of the second column to display the available actions.
4. Select the action you want to apply to the records that have their corresponding boxes checked.

Note:
The actions available may differ to those available from the **Row Action** ≡ list. This is because some actions cannot be applied to multiple records simultaneously.

5.2 Detail Pages

Detail pages are used to collate and display the information that is held on the system relating to the selected record.

Accessing a Details Page

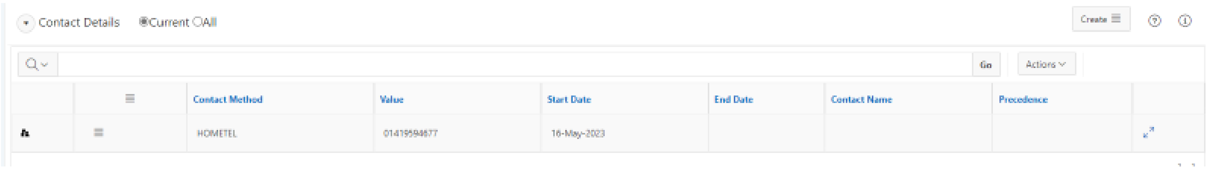
You can access a details page from regions or summary pages elsewhere in the system using the links available in the following:

Row Action List

Where there is more than one details page available from a region, select the details page required from the **Row Action** list ≡ corresponding to the record you want to view the details for.

That details page will then open with the record you selected in context.

Click Contact Details at the top of the page to view the following:

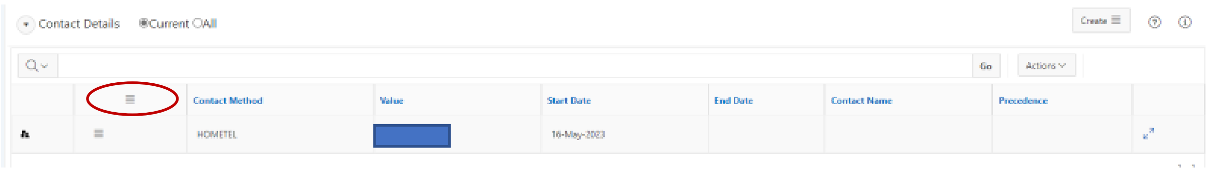


Bulk Actions List

You can, if you wish, simultaneously select several records to review in a details page. You do this by checking the boxes that correspond to the records you require.

When you have selected all the records you want, click the **Bulk Actions** ≡ list and select a details page from the list.

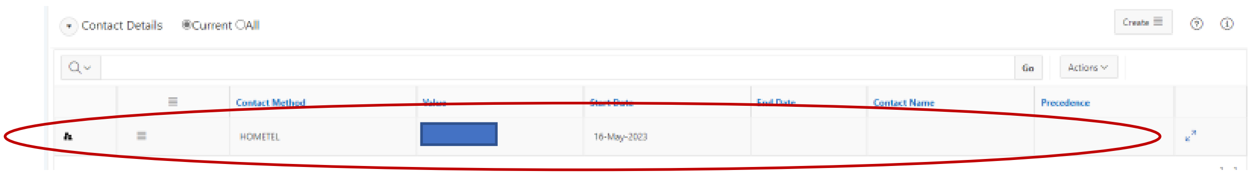
That details page will then open with the first record in context.



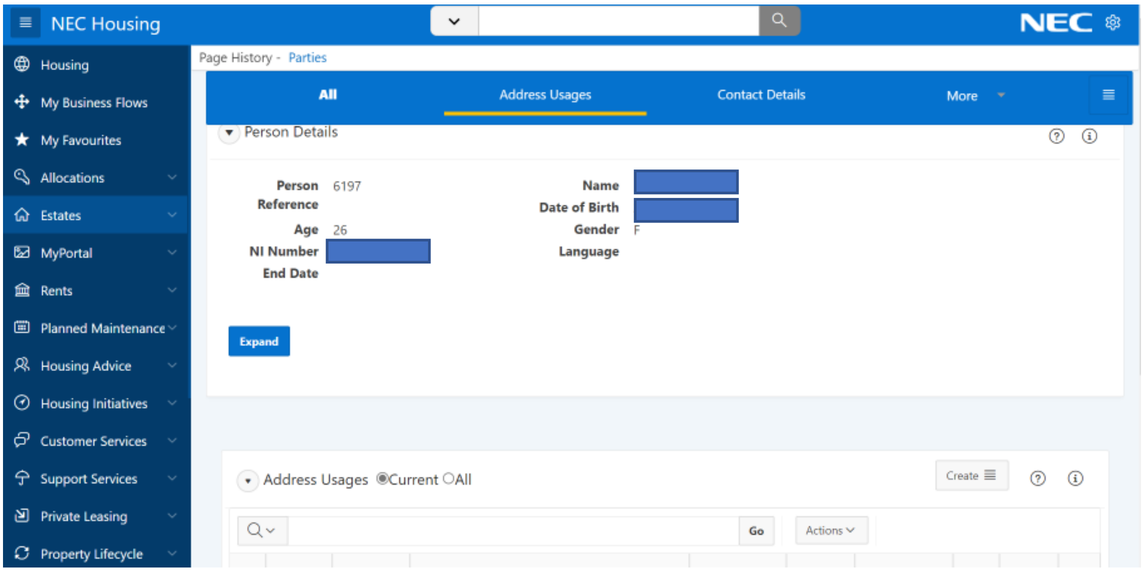
A Region Row

Where there is only one details page available from a region, click anywhere in the row of the record you want the details for.

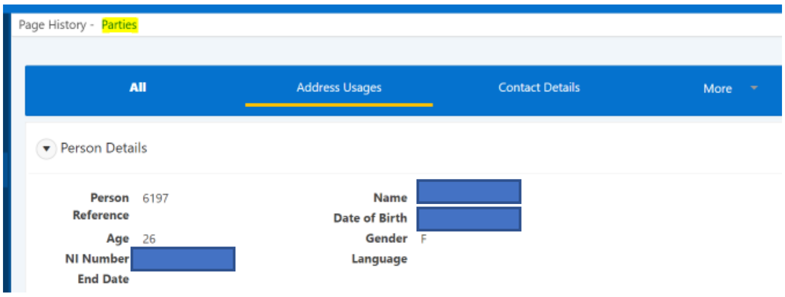
The details page will then open with the record you selected in context.



Using a Details Page



At the top of the details page, you will see the **Page History**, this is a breadcrumb trail that displays links to the pages you used to navigate to the details page.

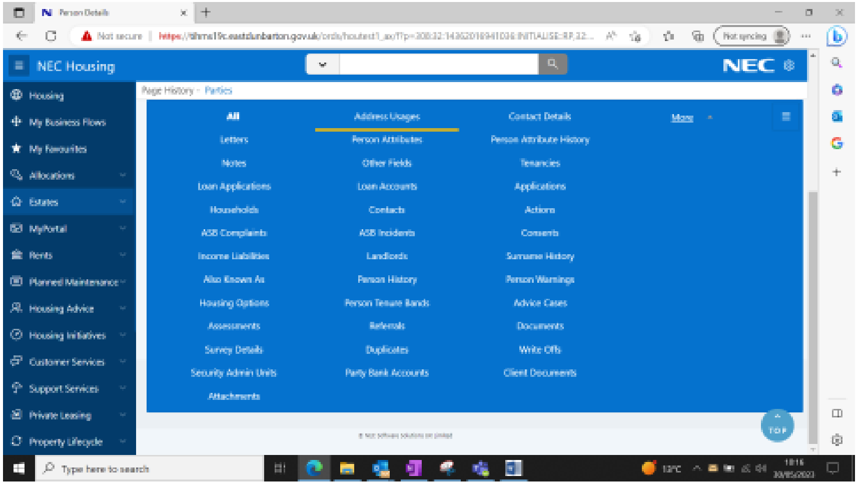


Directly below this is the region menu. Each link in this menu represents a region from which you can view and maintain the details relevant to the selected record

Once a region menu link has been clicked, it is highlighted with a yellow underline and the screen refreshes to display the corresponding region.

Tip:

Click **More** ▼ to expand the menu and display additional items.

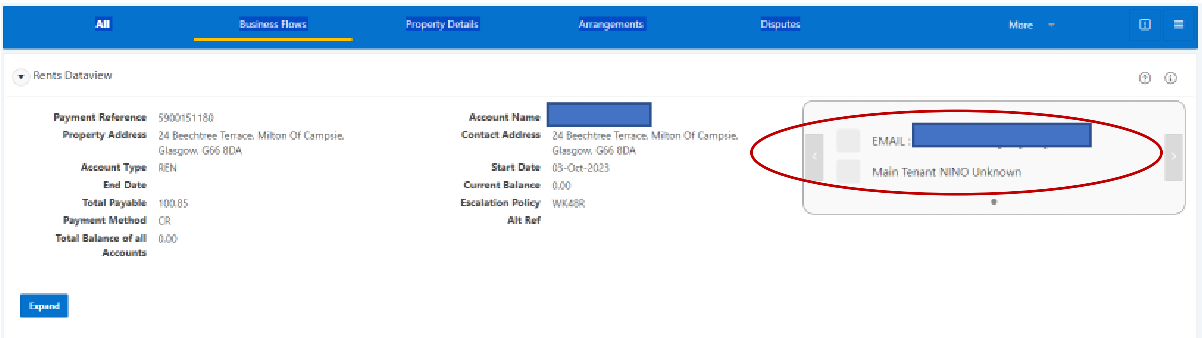


The region menu is locked at the top of the page so that when you scroll down the details page, the region menu will be retained in view. This also includes the **Actions** menu icon. This ensures that you can quickly and easily navigate around the details page no matter where you are on the page.

The portion of the screen below the region menu is called the **Context Block**. This area displays basic information about the selected record. Click **Expand** to view any additional information about the selected record.

Key information about the record may also be displayed in the **Key Details** area of the **Context Block**. For example, it might be a requirement to display that a tenant is deaf.

You can navigate through the **Key Details** area by using the **Next** and **Previous** icons at the side of the **Key Details** area.



Tip:

If you have sent more than one record to the details page from a summary page, you can scroll through them using the **Next** and **Previous** buttons at the bottom of the context block.

Detail Page Regions

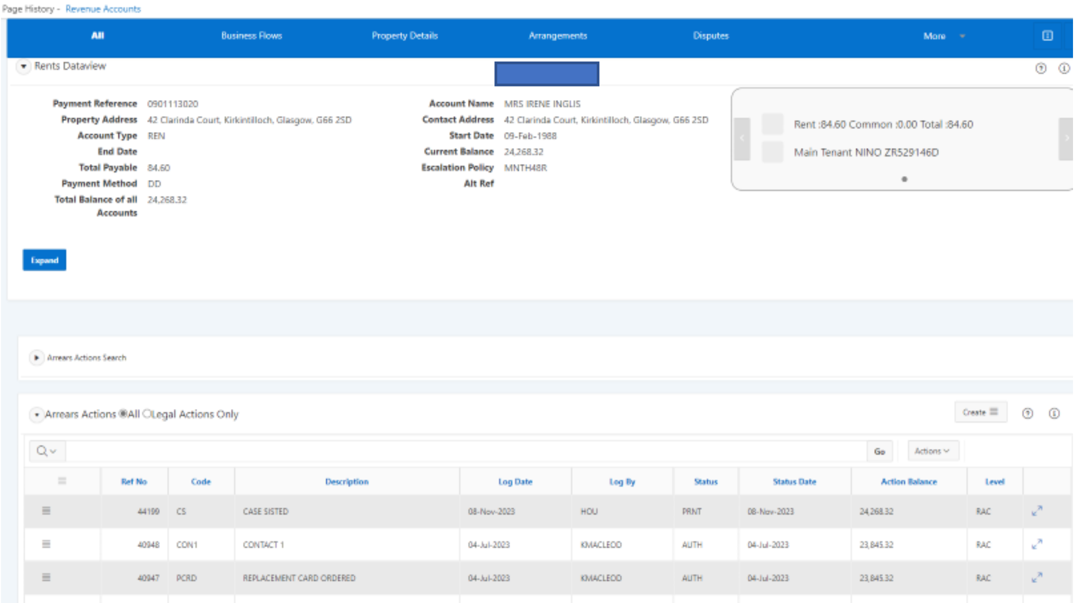
Details pages can contain several regions. The number of regions that appear on a details page will differ according to the business process.

From these regions you can view existing or historical data and maintain individual items associated with the record in context. Each alternating row of records inside the region is shaded a different colour to help with the visibility of the data.

You can click the **Excel** icon XLS at the top of the region to export the records in the region to Microsoft Excel. There is a limit of 200,000 records that can be downloaded to your device.

When you first access a details page, an overview of the selected record is displayed in the context block but there are no regions available. You can navigate to and open the region you want using the links in the region menu above the context block e.g. arrears actions.

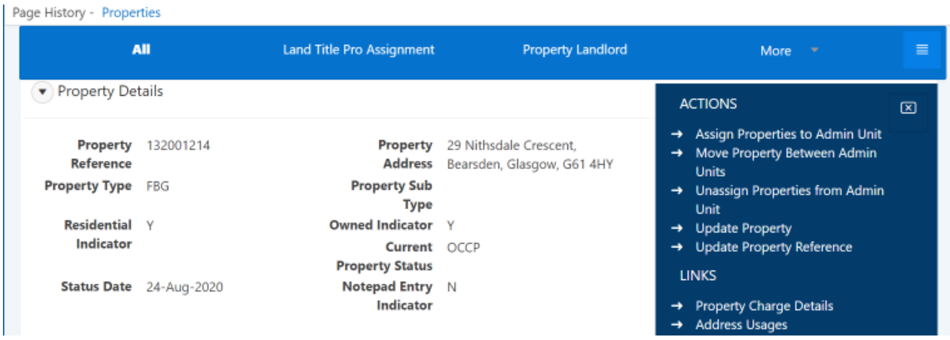
Tip:
Click **More** ▼ to expand the menu and display additional links.



Using the Options Pane

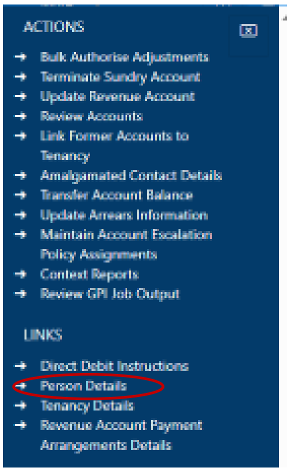
In addition to the links available from the menu at the top of a details page, there are often additional options available in either the **Actions** or **Links** areas of the pop-up **Options** pane.

By default, the **Options** pane is closed. The pane can be opened using the **Actions** ☰ icon at the top.



Actions

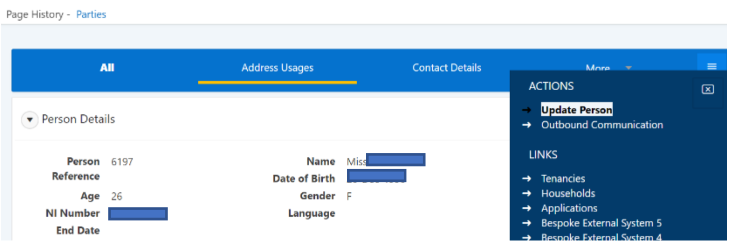
The 'Actions' area provides links to actions that can be performed for the record in context.

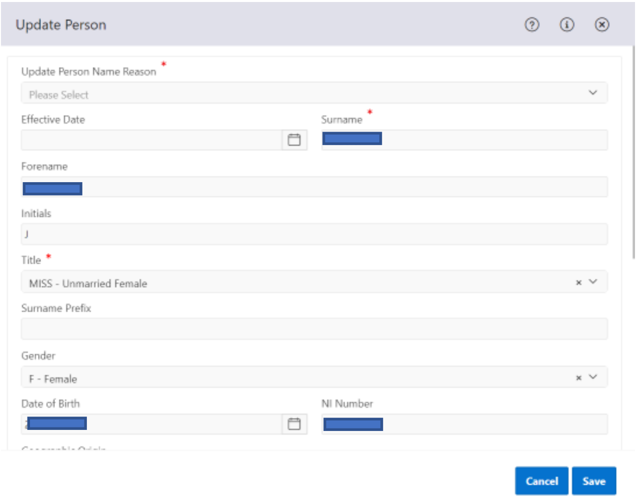


Example: How to use actions links

The following example shows how you can update person details:

1. Navigate to the **Person Details** page.
2. Click **Actions** icon to open the **Options** pane at the side of the details page.
3. Select Update Person from the **Actions** list in the **Options** pane.
   The **Update Person** form appears.
4. Enter the relevant data in the form.
5. Click **Save**.
   The form closes and you are returned to the **Person** details page.





Links

The 'Links' area provides links to other areas and can be defined by your organisation.

Example: How to use links from links list

The following example shows how you can access another summary page:

1. Navigate to the **Person Details** page.
2. Click **Actions** icon to open the **Options** pane at the side of the details page.
3. Select Households from the **Links** list in the options pane.
   The **Households** summary page appears.

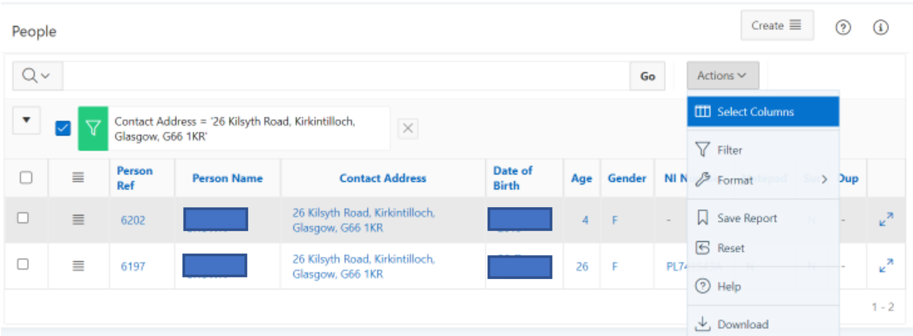
6. Interactive Reports

When you perform a search, the records that meet your search criteria are displayed in a region. Interactive reports enable you to customise the way those records are displayed.

Note:
The visibility of the interactive report options is dependent on your assigned job role.

You can create multiple variations of the report and save them as named reports, output them to comma-delimited files, and print them to PDF documents.

You can do all this and more, using the interactive report options available from the **Actions** list at the top of the region.



6.1 Columns

Select Columns

The 'Select Columns' option enables you to choose which columns you want to display or reorganise the order in which they are displayed.

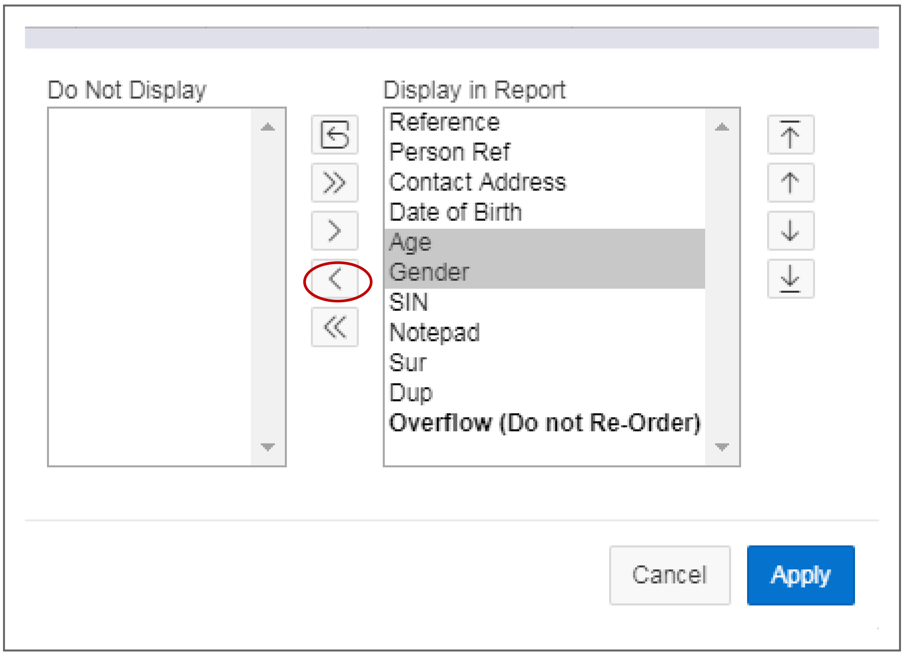
Example: How to manipulate region columns

The following example shows how you can; remove the **Age** and **Gender** columns from the **People** region and swap the order in which the **Contact Address** and **Person Name** columns appear.

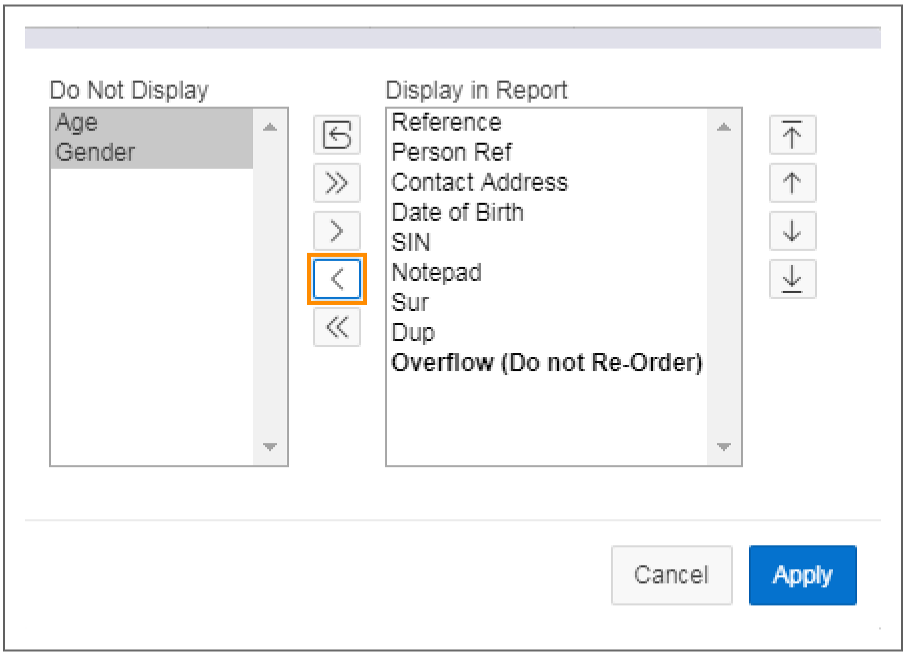
1. Click the **Actions** list.
2. Select Select Columns.

   The **Select Columns** pop-up window appears displaying the list of available columns.

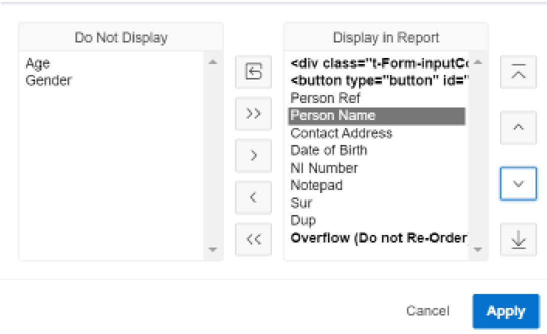
3. Highlight the names of the two columns that you don't want to display.



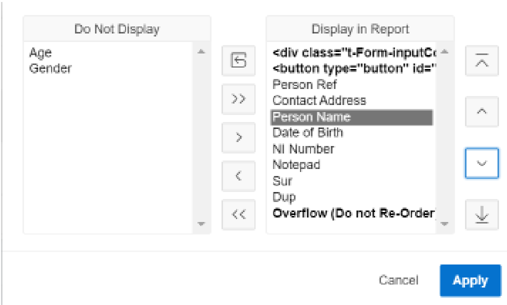
4. Click the **Remove** icon.
   The columns you selected are moved from the **Display in Report** area to the **Do Not Display** area.



5. Highlight the **Person Name** column name.

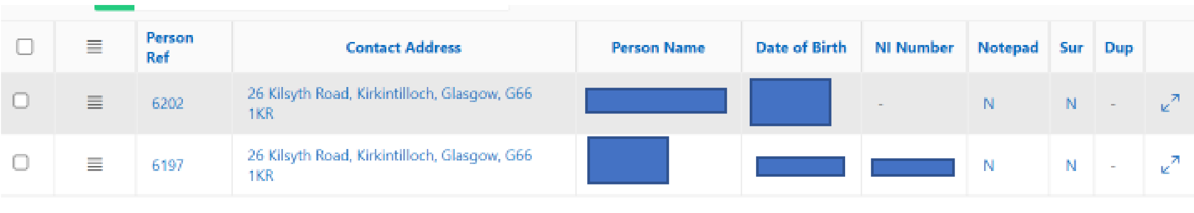


6. Click the **Down** arrow.
   The **Person Name** column moves below the **Contact Address** column.



7. Click **Apply**.

The pop-up window closes, and the region is refreshed to apply the changes you've made.



		Person Ref	Contact Address	Person Name	Date of Birth	NI Number	Notepad	Sur	Dup	
		6202	26 Kilsyth Road, Kirkintilloch, Glasgow, G66 1KR	[redacted]	[redacted]	-	N	N	-	
		6197	26 Kilsyth Road, Kirkintilloch, Glasgow, G66 1KR	[redacted]	[redacted]	[redacted]	N	N	-	

In this example, the **Age** and **Gender** columns have been removed and the **Contact Address** column now appears before the **Person Name** column.

6.2 Filter

The 'Filter' option enables you to filter the records displayed. This is particularly useful when the search criteria used will return many results.

Example: How to filter records

The following example shows how you can filter the records by the contact address you want to see.

1. Click the **Actions** list.
2. Select Filter .

The **Filter** pop-up window appears.

3. Select Column in the **Filter Type** field.
4. Select Contact Address in the **Column** field.
5. Select Contains in the **Operator** field.
6. Select the first line of the address in the **Expression** field.
7. Click **Apply**.

The pop-up window closes, and the region is refreshed to apply the changes you've made.

6.3 Format

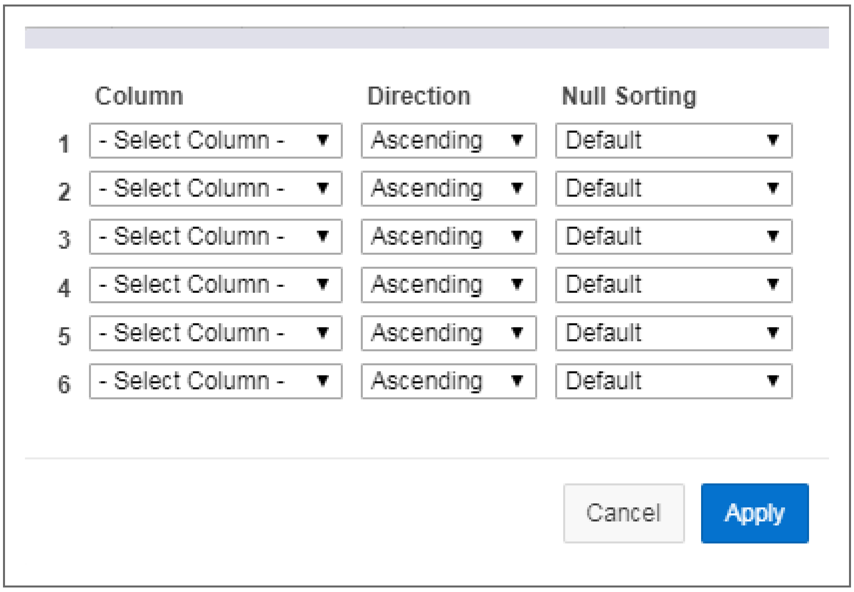
Format contains the following submenus:

Sort

Use **Sort** to change the columns you want to sort on and determine whether to sort them in ascending or descending order.

Example: How to sort columns

1. Click the **Actions** list.
2. Select Format .
3. Select Sort .



The **Sort** pop-up window appears.

4. Select Age in the **Column** field.
5. Select Descending in the **Direction** field.
6. Select Null Always First in the **Null Sorting** field.
7. Click **Apply**.

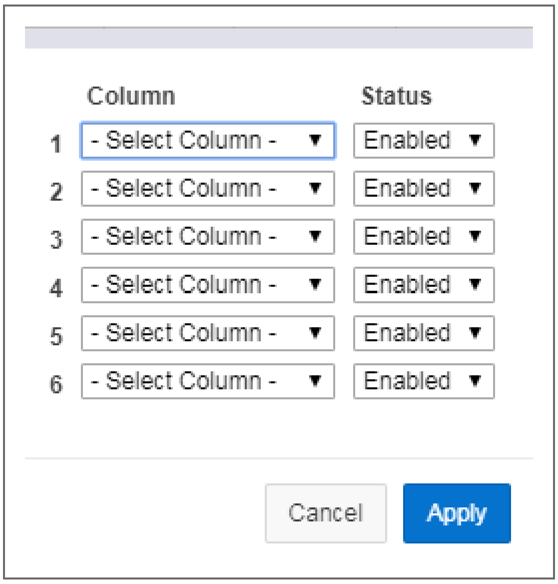
The pop-up window closes, and the region is refreshed to apply the changes you've made.

Control Break

Use **Control Break** to create a break group on one or several columns. This pulls the columns out of the interactive report and displays them as a master record.

Example: How to use Control Break

1. Click the **Actions** list.
2. Select Format.
3. Select Control Break.



The **Control Break** pop-up window appears.

4. Select Age in the **Column** field.
5. Select Enabled in the **Status** field.
6. Click **Apply**.

The pop-up window closes, and the region is refreshed to apply the changes you've made.

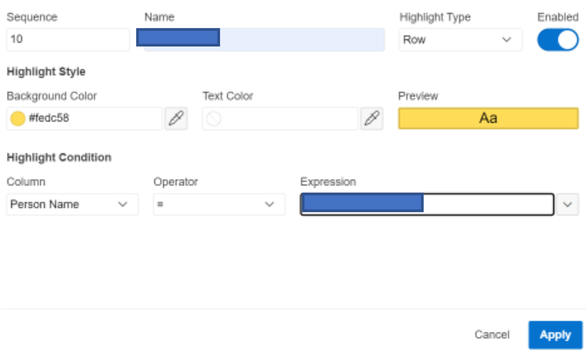
The **Age** column now appears as master records within the region.

Highlight

Use **Highlight** to define a filter that highlights the rows or cells that meet the filter criteria.

Example: How to highlight data

1. Click the **Actions** list.
2. Select Format .
3. Select Highlight .

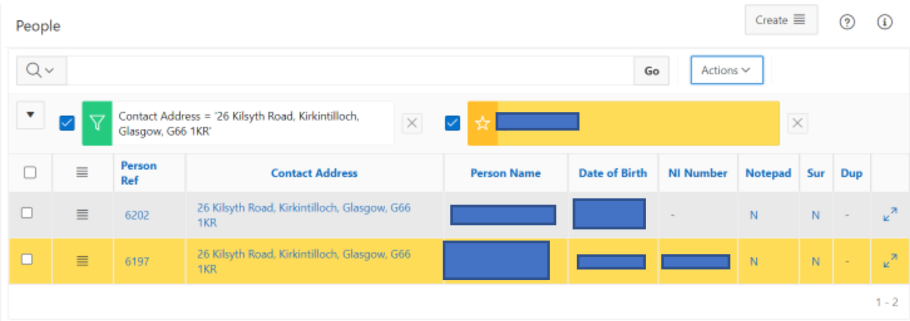


The **Highlight** pop-up window appears.

4. Enter People Over 50 in the **Name** field.

5. Select Row in the **Highlight Type** field.
6. Select [yellow] in the **Background Color** field.
7. Select Age in the **Column** field.
8. Select > in the **Operator** field.
9. Select 49 in the **Expression** field.
10. Click **Apply**.

The pop-up window closes, and the region is refreshed to apply the changes you've made.

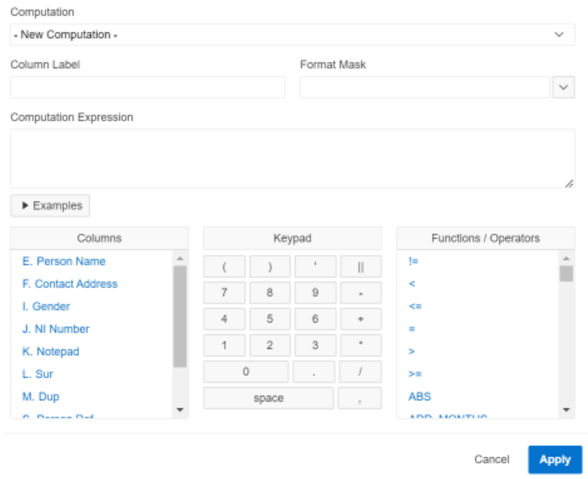


Compute

Compute enables you to add computed columns to a report.

Example: How to add computed columns

1. Click the **Actions** list.
2. Select Format.
3. Select Compute.



The **Compute** pop-up window appears.

4. Enter Pension Age in the **Column Heading** field.
5. Enter and/or select case when T > 64 then 'Y' else 'N' end using the options available from **Columns**, **Keypad** and **Functions / Operators** fields in the **Computation Expression** field.
6. Click **Apply**.

The pop-up window closes, and the region is refreshed to display the new column as the last column of the report.

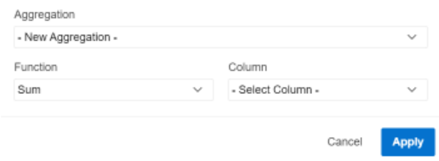
Tip:
Use the 'Select Columns' option change the position of a computed column within a report.

Aggregate

Aggregate enables you to perform mathematical computations against a column.

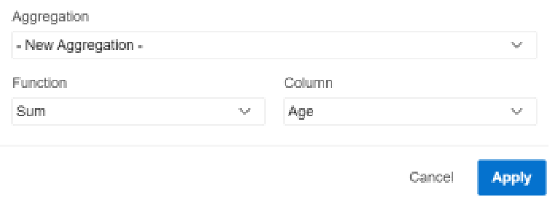
Example: How to perform mathematical computations

1. Click the **Actions** list.
2. Select Format.
3. Select Aggregate.



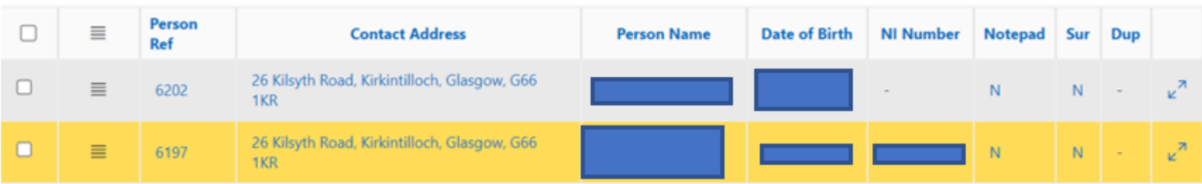
The **Aggregate** pop-up window appears.

4. Select Average in the **Function** field.
5. Select Age in the **Column** field.



6. Click **Apply**.

The pop-up window closes, and the region is refreshed to display the average age of the people in the **Age** column at the bottom of the report.



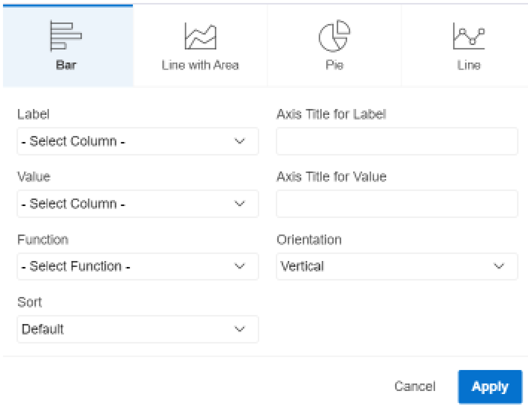
Chart

Use **Chart** to display report data in the form of a chart.

Example: How to generate charts

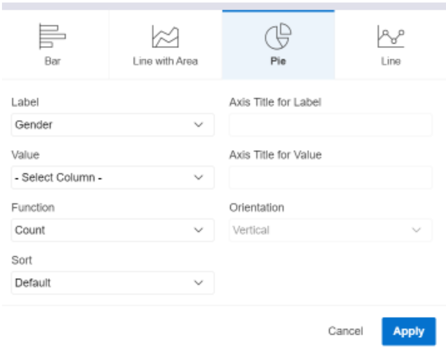
1. Click the **Actions** list.
2. Select Format.

3. Select Chart.

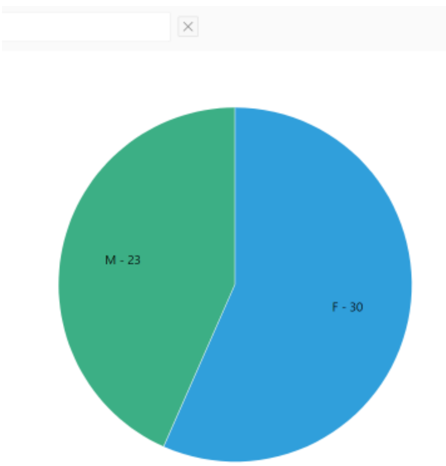


The **Chart** pop-up window appears.

4. Select Pie Chart in the **Chart Type** field.
5. Select Gender in the **Label** field.
6. Select Count in the **Function** field.



7.
8. Click **Apply**



9. .

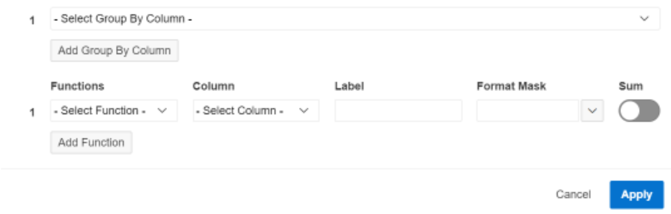
The pop-up window closes, and the region is refreshed to display the generated pie chart.

Group By

Group By enables you to group the result set by one or more columns and perform mathematical computations against columns

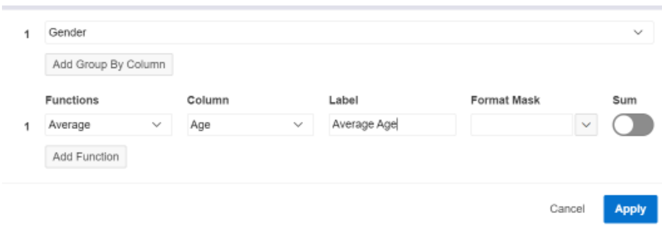
Example: How to group data together

1. Click the **Actions** list.
2. Select Format .
3. Select Group By .

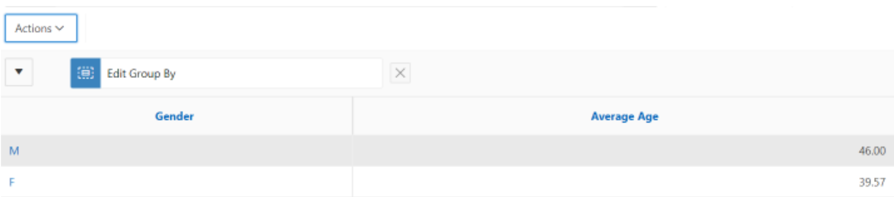


The **Group By** pop-up window appears.

4. Select Gender in the **Group By Column** field.
5. Select Average in the **Functions** field.
6. Select Age in the **Column** field.
7. Enter Average Age by Gender in the **Label** field.
8. Click **Apply**.



The pop-up window closes, and the region is refreshed to display the data that has been grouped by your criteria.



Pivot

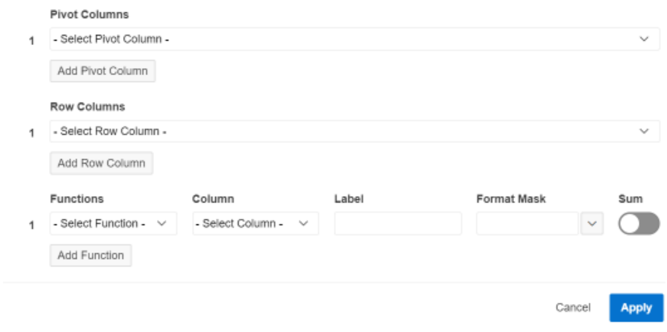
Pivot enables you to define a pivot report.

Note:

Pivot reports are used to reorganise and summarise the data of a more extensive report. This data might include sums, averages, and other statistics, that the pivot report groups together in a meaningful way.

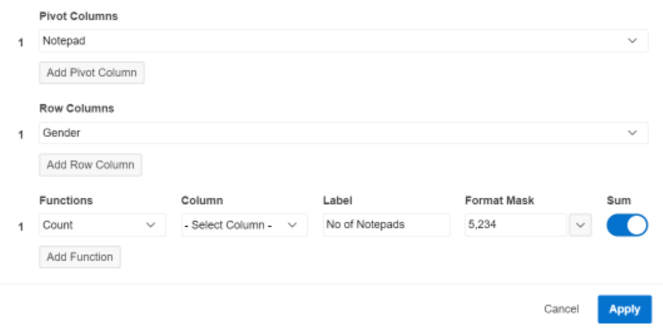
Example: How to generate pivot reports

1. Click the **Actions** list.
2. Select Format.
3. Select Pivot.



The **Pivot** pop-up window appears.

4. Select Notepad in the **Pivot Columns** field.
5. Select Gender in the **Row Columns** field.
6. Select Count in the **Functions** field.
7. Select Notepad in the **Column** field.
8. Enter Number of Notepads in the **Label** field.
9. Select 5,234 in the **Format Mask** field.
10. Check the **Sum** field.
11. Click **Apply**.



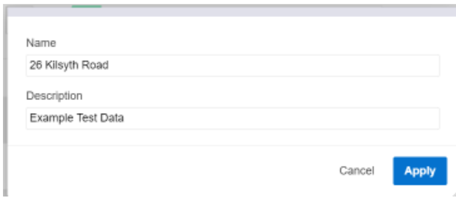
The pop-up window closes, and the region is refreshed to display the pivot report.

6.4 Save Report

This option enables you to save a customised report for future use, even after you have logged out and back in again.

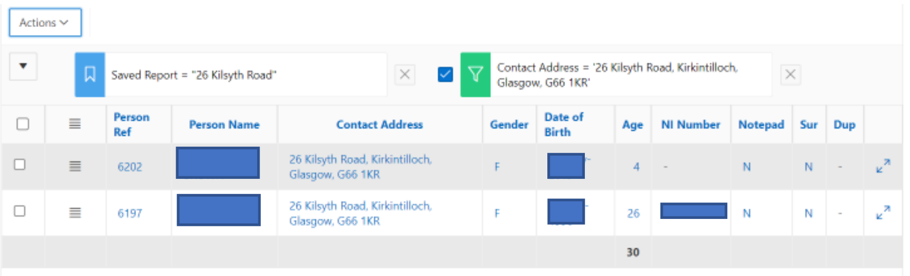
Example: How to save a report

1. Click the **Actions** list.
2. Select Save Report .
3. Enter a unique name for your report.
4. Enter a short description of your report.



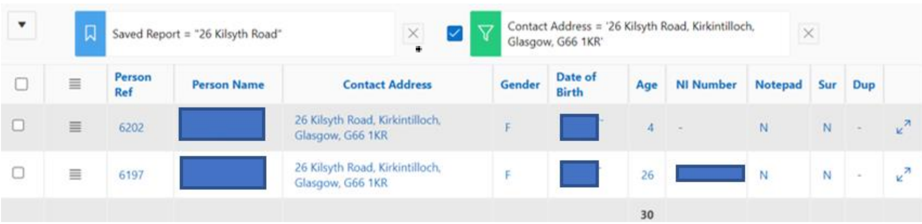
5. Click **Apply**.

The report is saved and can be selected from a drop-down list at the top of the region.



Example: How to delete a saved report

You can delete a report that you have previously saved by clicking the 'X' against the bookmarked entry at the top of the region and confirm the deletion when asked to do so.



6.5 Reset

The 'Reset' option enables you to remove any changes you have made to the report and restores it to its default settings.

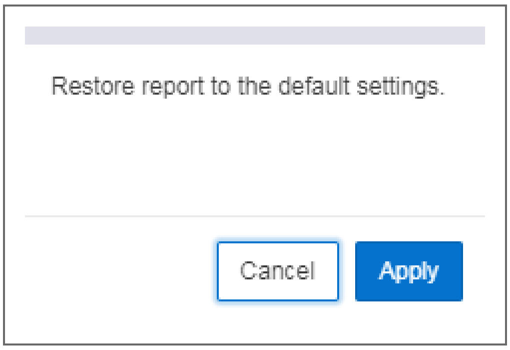
Example: How to reset a report

In the following example a filter that was applied to show only males in the report will be removed using the 'Reset' option.

1. Click the **Actions** list.

2. Select Reset .

   The **Reset** pop-up window appears.



3. Click **Apply**.

The report has been reset to the default settings.

6.6Download

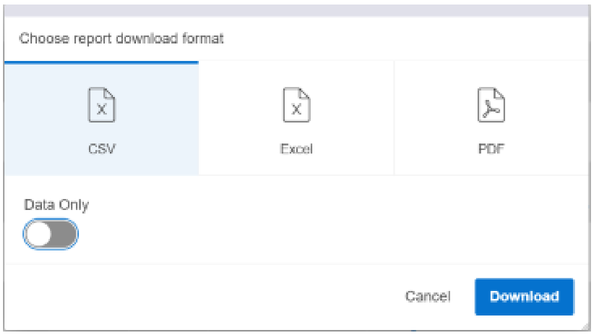
If you want to download a CSV, PDF or XLSX copy of the report, you can do so using the 'Download' option.

Example: How to download a CSV report

1. Click the **Actions** list.
2. Select Download .

   The **Download** pop-up window appears.
3. Click the **CSV** icon.

The report is immediately downloaded to your default download folder.

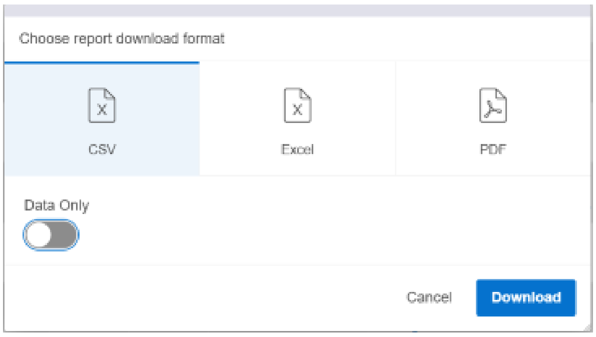


Example: How to download a PDF report

1. Click the **Actions** list.
2. Select Download .

   The **Download** pop-up window appears.
3. Click the **PDF** icon.

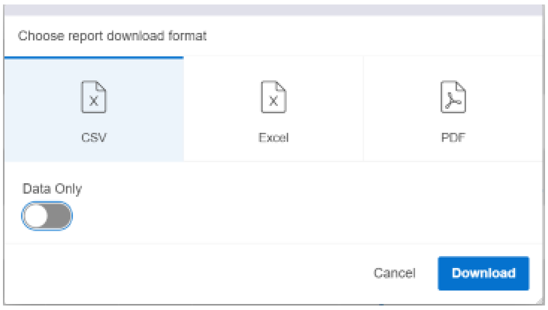
The report is immediately downloaded to your default download folder.



Example: How to download a XLSX report

1. Click the **Actions** list.
2. Select Download .
   The **Download** pop-up window appears.
3. Click the **XLSX** icon.

The report is immediately downloaded to your default download folder.

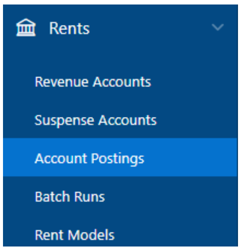


7 Account Postings

7.1 Creating Account Postings

Note: Best to have a report of all the payment methods, amounts and totals for this before starting this process.

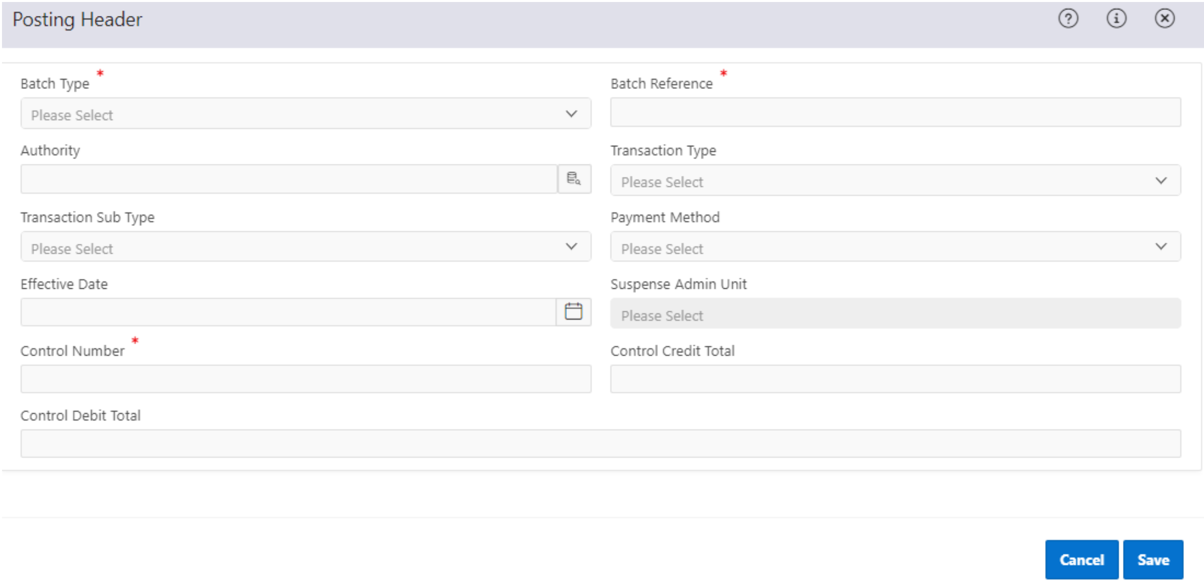
1.From any page on the "Housing" modules navigation on the left hand side find and select "Rents" and then "Account Postings"



2 Click "Create" and then "Create Cash Posting Batch"

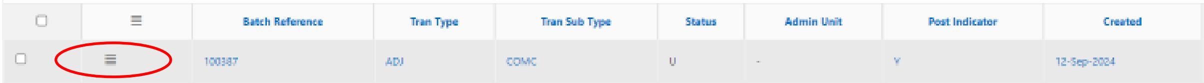
3 "Complete the ""Posting Header"" wizard ensuring to complete the following:

- Batch Type - Should be ""General""
- Batch Reference - Create a reference for these payments
- Transaction Type - Select the relevant transaction type
- Transaction Sub Type - Select the relevant transaction sub type
- Payment Method - Can leave this blank
- Effective Date - The date the payment is due to go into the account, likely todays date
- Control Number - The total number of accounts you are putting an adjustment on
- Control Credit Total - If required the total amount of credit to be added to the rent accounts
- Control Debit Total - If required the total amount of debit to be added to the rent accounts"



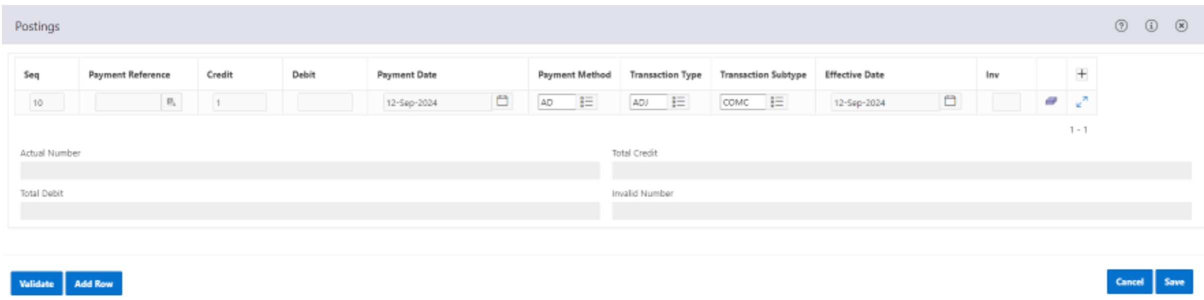
4 Click "Save"

5 "Row Action" the batch you have created and click "Create Cash Postings"



6 Complete the ""Postings"" wizard ensuring to complete the following:

- Seq - This is a number assigned to that payment, has to be unique to each payment (is automatically populated when you click ""Add Row"")
- Payment Reference - Copy the payment reference of the accounts needing the adjustment
- Credit - The amount due to each account
- Debit - The amount due to each account
- Payment Date - The date the payment is due in the account (likely todays date)
- Payment Method - Will be automatically populated
- Transaction Type - Will be automatically populated
- Transaction Subtype - Will be automatically populated
- Effective Date - Should be the todays date
- Inv - Leave Blank



7 Click "Add Row" to add the next payment and if any rows need deleted click "Remove this Row" at the end of the row.

8 Once all the payments have been done validate the data.

8 Click "Save"

9 "Row Action" the batch again and click "Update Account Cash Posting Header"

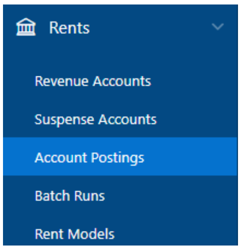
10 Complete the "Account Cash Posting Header" by checking the details and in the Posting Options click "Immediately".

11 Click "Save"

7.2 Updating Account Postings

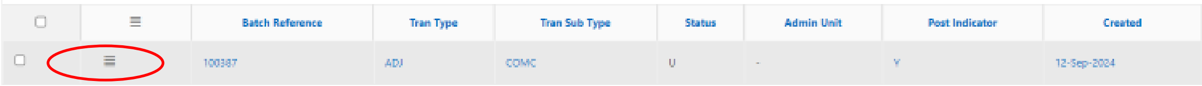
Note: You can only update account postings that have not posted to the rent account.

1. From any page on the "Housing" modules navigation on the left hand side find and select "Rents" and then "Account Postings"



2 Search for the account posting using the search bar, you can search for all unposted batches by searching for "U" under "Status"

3 "Row Action" the account posting and select "Posting Details"



4 This opens the "Posting Details" page where you can create additional account postings using the "Create" and then "Create Postings". Complete the "Create Postings" wizard ensuring to complete all the mandatory fields.

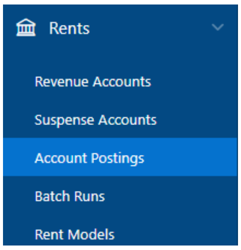
5 In the "Posting Details" page you can also update any of the postings by "Row Action" the posting and clicking "Update Posting". This opens the "Update Postings" wizard where you can edit any part of the posting. Click "Save" once done.

6 In the "Posting Details" page you can also delete an account posting by "Row Action" the posting and clicking "Delete Unposted Posting". This opens a confirmation window where you can click "Ok" to confirm you would like that posting deleted.

Removing Account Postings Batches

Note: You can only delete account postings that have not posted to the rent account.

1.From any page on the "Housing" modules navigation on the left hand side find and select "Rents" and then "Account Postings"



2.Search for the account posting using the search bar, you can search for all unposted batches by searching for "U" under "Status"

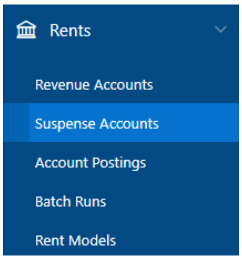
3."Row Action" the account posting and select "Delete Unposted Batch"

4. This opens a confirmation window where you can click "Ok" to confirm you would like this batch deleted.

8. Suspense Accounts

8.1 Viewing a Suspense Account

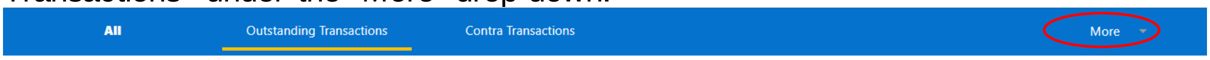
From any page on the "Housing" modules navigation on the left hand side find and select "Rents" and then "Suspense Accounts"



2 Search for the suspense account by searching for account number 0

3 Select the suspense account by double clicking or Row Action

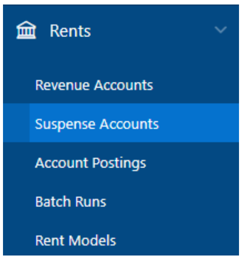
4 You can now view the "Outstanding Transactions" and the "Contra Transactions" under the "More" drop down.



Note: There is only one suspense account "0" which includes housing benefit transactions.

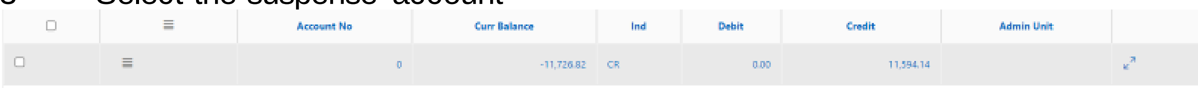
8.2 Transferring Transactions from a Suspense Account

From any page on the "Housing" modules navigation on the left hand side find and select "Rents" and then "Suspense Accounts"

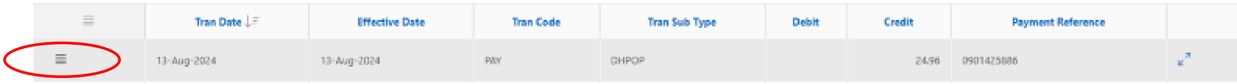


2 Search for the suspense account by searching for account number 0

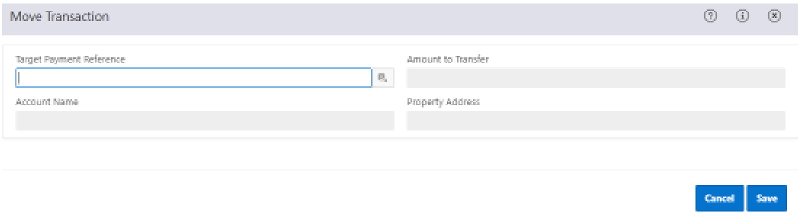
3 Select the suspense account

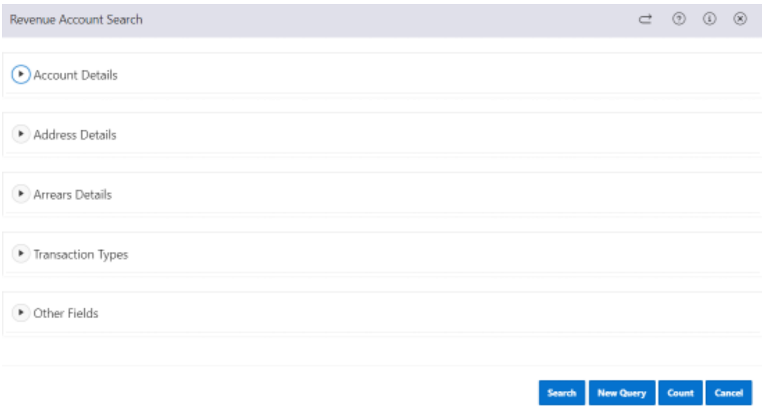


4 "Row Action" the transaction you'd like to move and select "Move Transaction"



5 Complete the "Move Transaction" wizard by ensuring you select the target payment reference using the "Open Search Page" and searching for the revenue account it is to go into. Click "Search" and once the search results show the correct rent account click "Select".

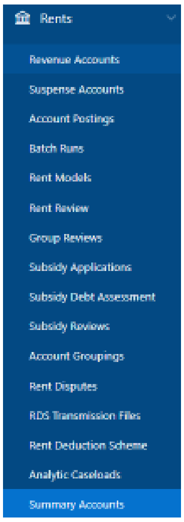




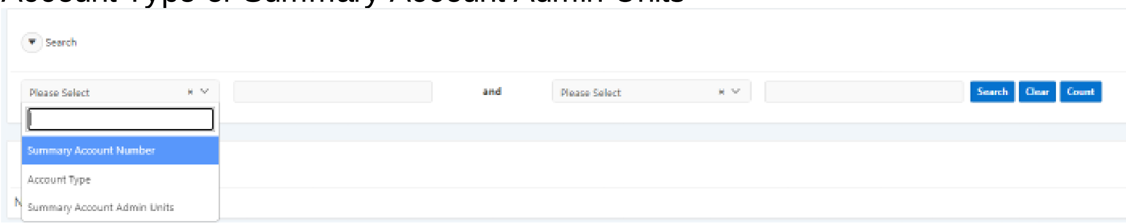
6 Click "Save"

9.Viewing Summary Accounts

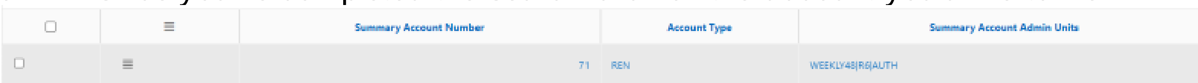
1 From any page on the "Housing" modules navigation on the left hand side find and select "Rents" and then "Summary Accounts"



2 Use the search bar to search by either the Summary Account Number, Account Type or Summary Account Admin Units



3 Once you've completed the search click on the account you'd like to view



4 This opens the Summary Account Details page

Note: The wild card (%) doesn't work for the search bar. You have to 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

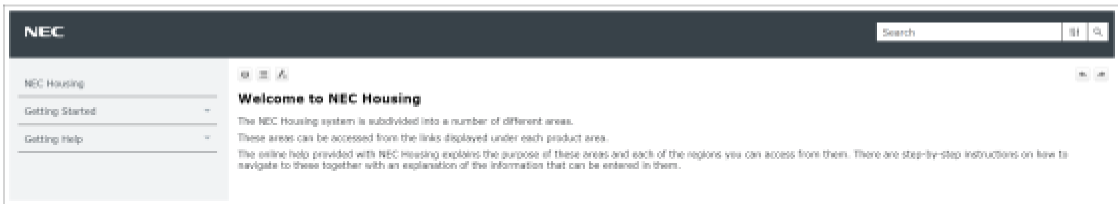
10. Online Help

NEC Housing is accompanied by an extensive online help system. The NEC Housing online help provides you with detailed guidance as well as hints and tips about the NEC Housing system.

The help is context sensitive; this means when you call the help, the topic that appears is directly relevant to the area of the application from which the Help was called.

Note:
When you call the help in a context-sensitive manner, it "knows" where you are within NEC Housing, but not what you are currently doing or attempting to do. Therefore, the first help topic that appears is designed to anticipate the information that you are mostly likely to need given your current location but will often include links to other information that you may find useful.

The help is displayed in its own browser window or, depending on how your device is configured, in a new tab of the current browser.



The help window stays open until you close it. If you call the help from another part of the NEC Housing system, the window is re-used (in other words, only one help window should be open at a time).

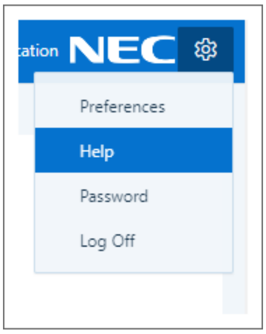
10.1 Calling the Help

The online help provided with NEC Housing can be called in a number of different ways depending on the sort of information you are looking for.

I want to search the online help

To open the home page of the online help, click the **Help** link in the system menu which can be found in the top right-hand corner of the screen.

The system menu will look like this:



You can then enter your search criteria into the search bar in the online help to find the information you need.

I want to know what I can do here

If you want to know what actions can be carried out from the page or region you are currently using, you can call the help topic that relates specifically to the page or region.

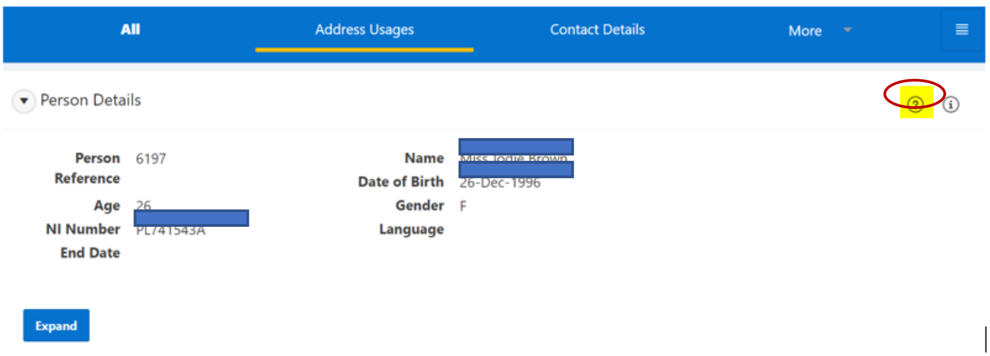
Regions

You can call the help from a region using the **Help** **icon**:

The online help opens and immediately displays the page that explains what the region is for and what you can do from it.

Details Pages

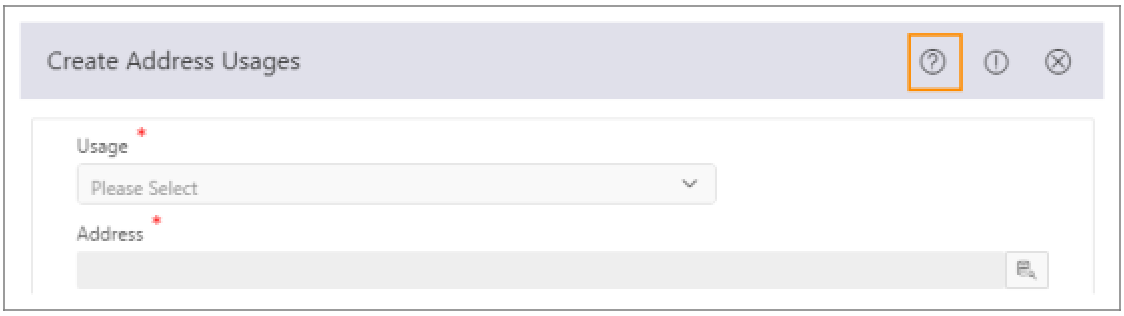
You can call the help from a details page using the **Help** icon at the top of the context block.



The online help opens and immediately displays the page that explains what the details page is for and what you can do from it.

I want to know what data to enter

If you want to know what data needs to be entered in a specific field, you can call the help page for the form that you are using. To do this, click the **Help** icon in the title banner of the form.



10.2 Searching the Help

The online help provided with NEC Housing covers all areas and modules of the application and as a result, the information contained within it is extensive.

However, the search facility enables you to find what you are looking for quickly and easily using a variety of criteria. It also enables you to restrict your search criteria to the areas of NEC Housing that you personally use with simple filters.

Enter Search Criteria

You can search for information using a single word, phrase, glossary term or abbreviation.

To search the online help, enter your search criteria in the **Search** bar then click the search button .

Tip:
Over type the 'Search' hint text in the search bar with your search criteria.
Punctuation marks such as the full stop, colon, semicolon, comma and hyphen are ignored during a search.

All searches are case-insensitive but results that match the case you used are ranked higher than those that do not.

All searches automatically include stem searching - therefore a search for 'Edit' would also find 'Editing' or 'Editor'. However, exact matches are ranked higher than stem matches.

To search for an exact phrase, enclose it in double quotes.

Example:

Enter "creating admin units" to find topics that include that phrase or use them to find topics that contain exact words by enclosing each word in double quotes.

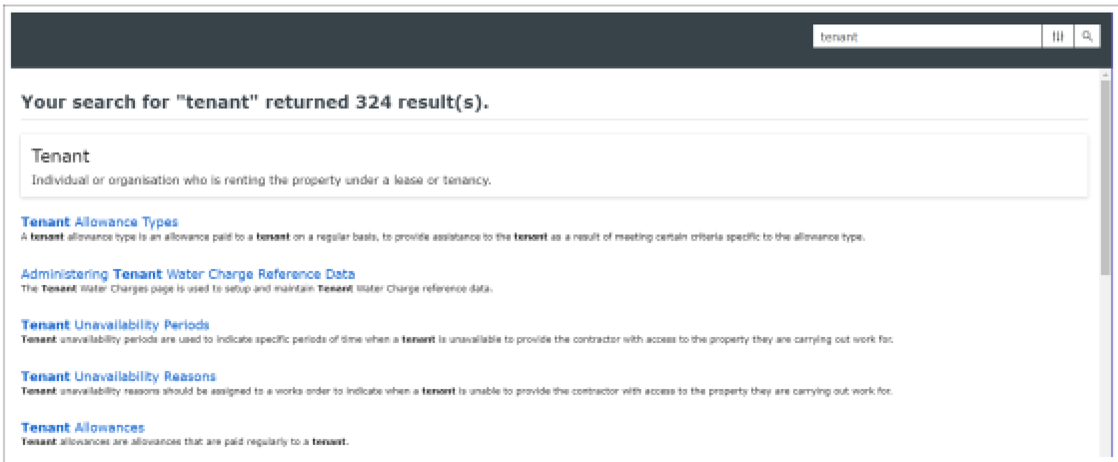
Search Results

When searching for a topic, the help system will search every document in the online help database, returning a list of topics that exactly or partially match your search criteria.

Tip:

If the system does not return any results within a matter of seconds, try amending or rephrasing your search criteria.

If your search criteria are included in the glossary, the glossary term will appear in a box at the top of the search results.



To select a topic from the results, click the title.

When you select a topic from the search results the corresponding help page appears and the text within the page that meets your search criteria is highlighted for easy reference.

Filter the Search Results

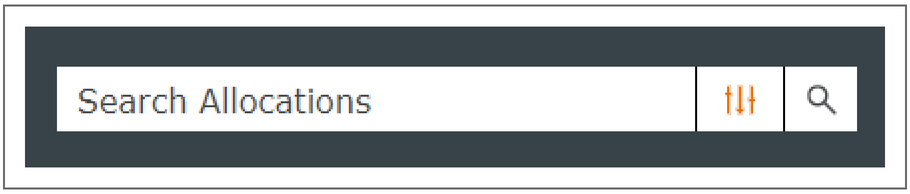
By default, the help system will search the entire online help database and return a list of topics that match your criteria regardless of the area or module to which they apply.

You can reduce the number of results returned to the specific module or area of the system that interests you.

Example:
If you were to search for 'tenancies' without using the filter, the system would return over 400 help topics. However, if you were to restrict that same search to the Allocations module, the system would return less than 40 and those topics would be specifically relevant to Allocations.

To filter the results, click the filter button and select the area or module that you are interested in. The filter button changes colour to indicate that it has been switched on.

- If you were reviewing your search results at the time you applied the filter, the system will automatically update the results and only display those topics that apply to the area you selected.
- If you applied the filter prior to entering your search criteria, the hint text in the search bar will change to indicate the area that they search results will be restricted to.



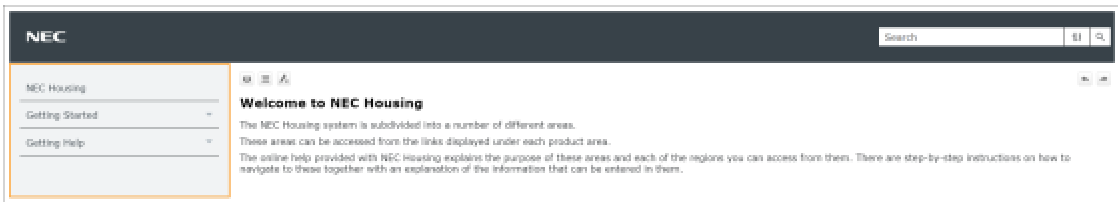
Online Help Menu

There is a short menu available from the banner at the top of the online help page.

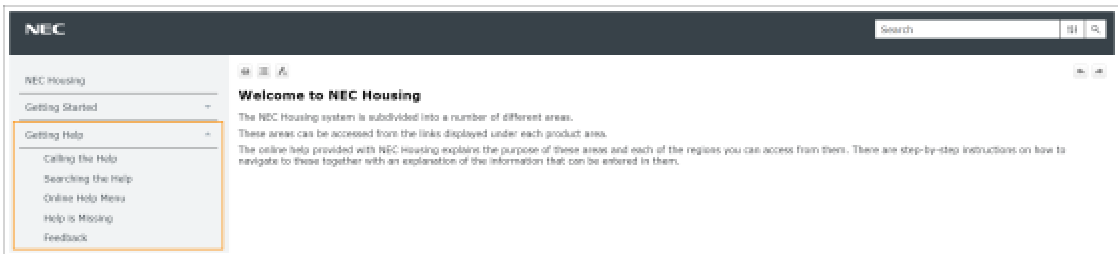
However, this will change in accordance with the device you are using to access the help.

I am using a laptop / PC monitor

When you access the online help in a browser that spans the width of your laptop or monitor, you will see a menu on the left-hand side of the online help page.



When you place your mouse over an item in the menu, a list of the topics available from that menu is displayed.

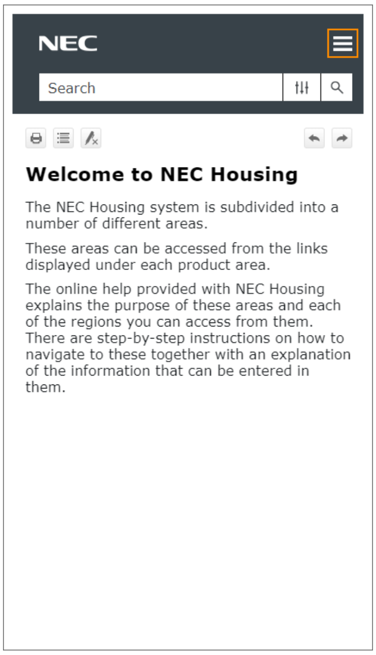


You can then select the topic that interests you.

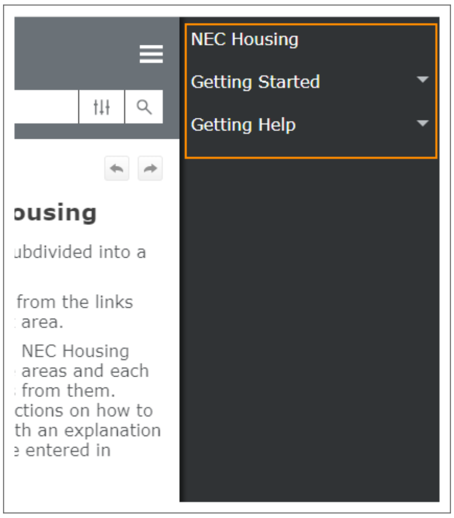
Tip:
If you reduce the size of your browser to that of a tablet, the menu will change and function in the same way as it does for a mobile device.

I am using a mobile device

When you access the online help using a mobile device such as a smartphone or tablet, a menu icon appears on the right-hand side of the online help page banner.

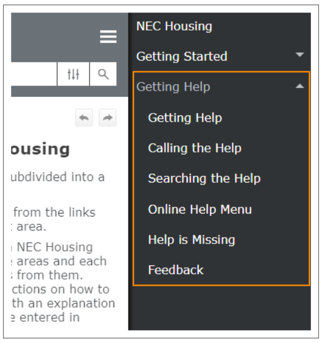


When you click the menu icon the help page slides to the left to reveal a navigation panel on the right-hand side of the screen.



You can then select the menu you want to view.

If the menu you chose has multiple topics within it, the navigation panel refreshes to display the topics available to you.



You can then select the topic that interests you.

Help is Missing

If you call the help from anywhere other than the 'system menu' at the top of the screen and the help topic that appears is not relevant to what you are doing, please log a support call so we can fix the problem.