



National Affordable Housing Programme

Entering HomeBuy Direct Bids

System Guide for Providers v1.0

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1. Introduction

This guidance is written for Providers who are bidding for HomeBuy Direct funding from the National Affordable Housing Programme. It provides step-by-step guidance on how Providers enter bids directly to the Homes and Communities Agency's Investment Management System (IMS). Further HomeBuy Direct Guidance will be issued in the week beginning 19 January covering the steps required for allocations and scheme and payment processing, when access to that part of the system is available.

The basic steps involved in submitting HomeBuy Direct bids in IMS are:

i) Creating a HomeBuy Direct Partnership (section 3)

Even Partners who have an existing NAHP partnership for 2008-11 must create a new, separate HomeBuy Direct partnership

ii) Creating a HomeBuy Direct Agreement attached to the Partnership created in i above (section 4)

iii) Inputting HomeBuy Direct Project/s under the Agreement created in ii above (Section 5)

The Project is the first of the two parts of a bid and acts as a header for the bid;

iv) Inputting Homebuy Direct Sub-Products linked to the Project(s) inputted in iii above (Section 6)

The Sub Product is the second part of the bid and sits under the Project. The majority of the bid data is entered via the Sub Product.

v) Submitting your HomeBuy Direct Agreement to the HCA (Section 6)

Once your Agreement is submitted and accepted by the HCA you will then be able to submit HomeBuy Direct Bids on an ongoing basis through your existing Agreement by:

i) Inputting HomeBuy Direct Project/s (Section 5)

ii) Inputting and Submitting Homebuy Direct Sub-Products (Section 5)

This guidance deals exclusively with system processing. For further information about HomeBuy Direct, please consult the HomeBuy Direct section of the [Affordable Housing Capital Funding Guide](#).

2. Accessing the Investment Management System

2.1 Registering to use IMS

If you are a Provider who has not yet registered to use the Investment Management System, please follow the registration procedures which can be found at http://www.homesandcommunities.co.uk/new_user

2.2 Configuring your network and system to use IMS

Please consult our connectivity guide which can be found at: http://www.housingcorp.gov.uk/upload/pdf/110_Connectivity_Guide.pdf. This document details the necessary technical steps and procedures required to access the Investment Management System. The system is based on the Citrix Metaframe with a Citrix NFuse portal providing the gateway to the system. If you experience any problems in this process please contact the IMS Service Desk on 0845 300 4347.

2.3 IMS Security

If you have registered to use IMS you will have at least one nominated IMS security administrator in your organisation. This person will be able to set up new users in IMS for your organisation and to add the authority for each user to carry out specific tasks within IMS.

Please see Annex 1 of this document for a quick guide for security administrators on how to set-up new users with the appropriate authorities to process HomeBuy Direct bids.

2.4 Logging onto IMS

Once you have accessed the online site by following the steps in the Connectivity Guide (see 2.2 above), select the **IMS** icon. The following Logon Screen will be displayed:

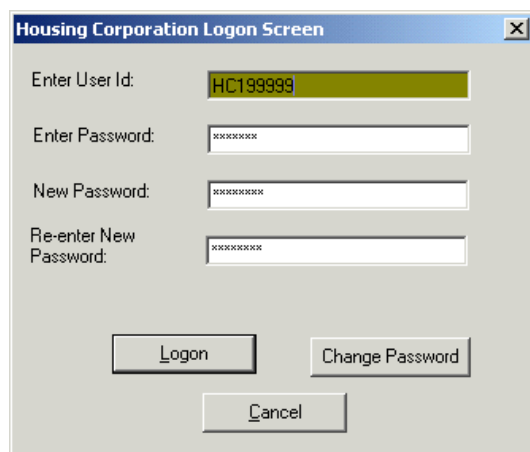


Fig. 1 IMS User Logon Screen

Following successful input of your User Id and Password in the logon screen above the screen opposite will be displayed in which you will need to confirm organisation type and code.

Please note: all organisations with a code with the Prefix **NP** are classed as an **Unregistered Body** within IMS.

- Enter your User Id
- If logging on for the first time your password will be **newpass**
- If password is **newpass** then you will have to input and re-enter a new password (minimum 6 characters) and then select **Change Password**
- If you forget your password your security administrator can reset it for you

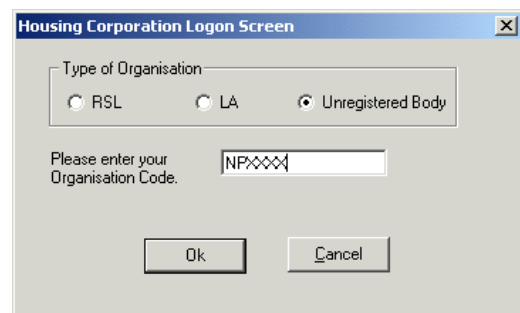


Fig. 2 Organisation Logon Screen

Once you have entered the Organisation Type, Organisation Code and selected **Ok** the system will log you into IMS and the **System Manager** screen will open. This is the main screen in IMS from which all IMS applications and functions can be accessed, including bids, allocations, schemes and payments.

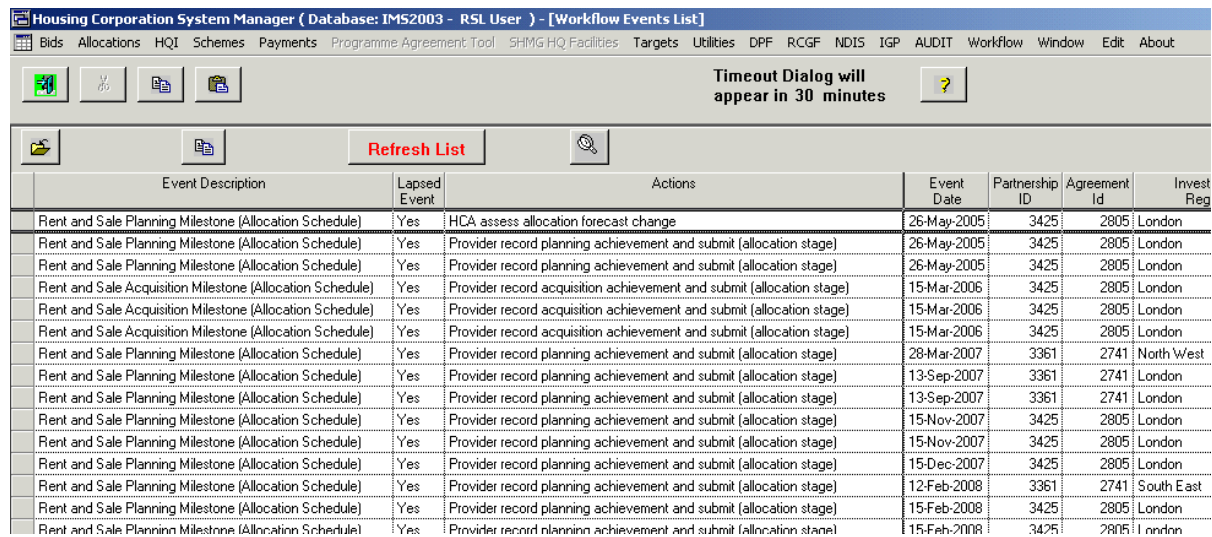


Fig. 3 System Manager screen including workflow items

When you log into IMS, the System Manager screen initially displays details of workflow items relating to your organisation. You don't need to understand the workflow feature in order to submit HomeBuy Direct bids but it's a useful feature of the system and information and guidance on it can be found at <http://www.homesandcommunities.co.uk/help>

To close workflow and return to the standard **System Manager** screen select the

exit from current window icon  towards the top-left of the screen. You will then see the standard **System Manager** screen minus the workflow items:

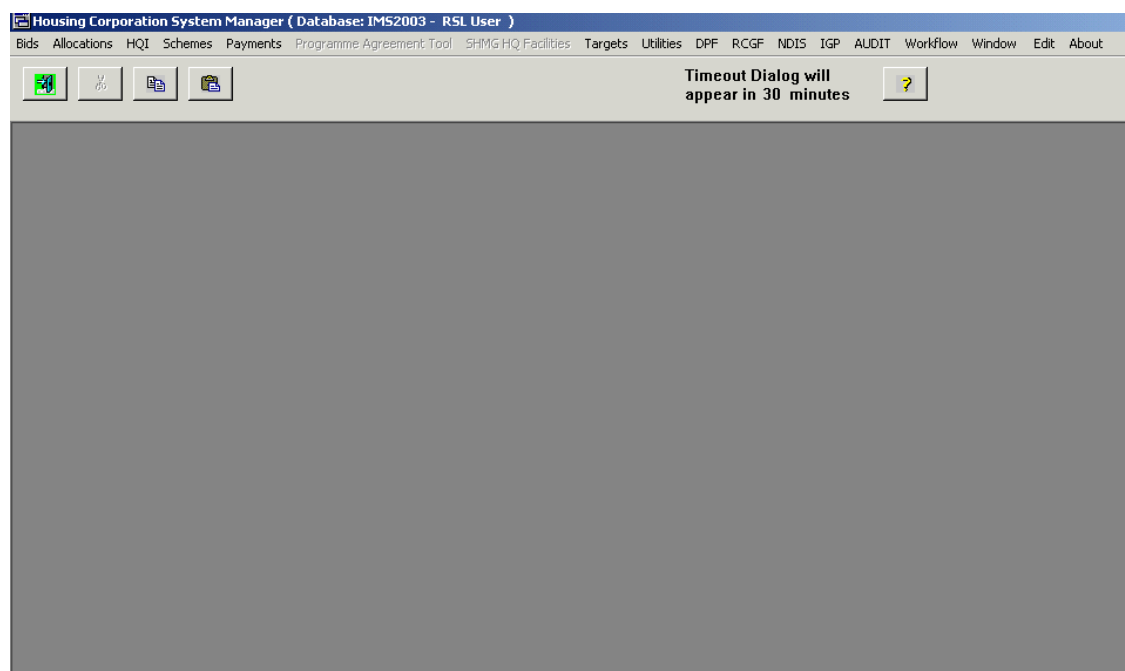


Fig. 4 System Manager screen without workflow items

3. Creating a HomeBuy Direct Partnership

3.1 Navigating to the Partnership Screen

From the IMS System Manager screen select **Bids > Partnerships/Specialists**

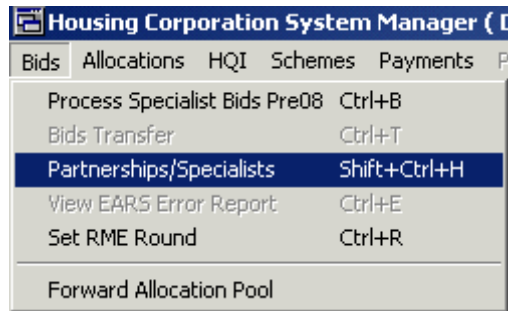


Fig. 5 System Manager screen – Bids menu

In the subsequent Partnership Screen select **Partnerships > Select**

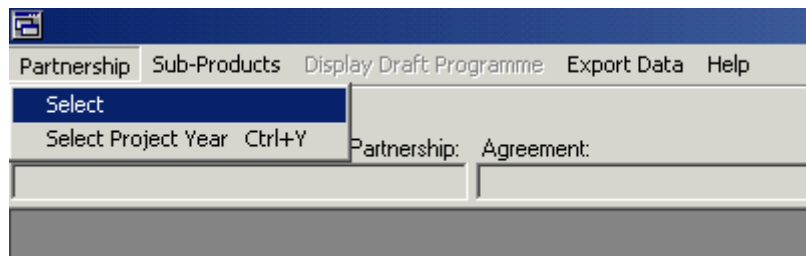
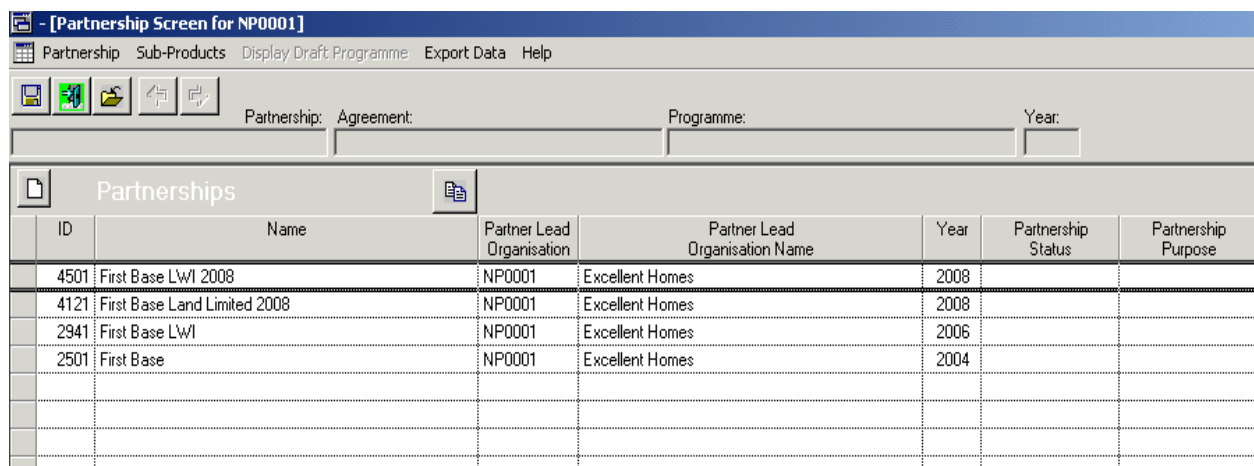


Fig. 6 Bids screen – Partnership menu


The following Partnership screen will be displayed. This will list all existing Partnerships which you are a member of:

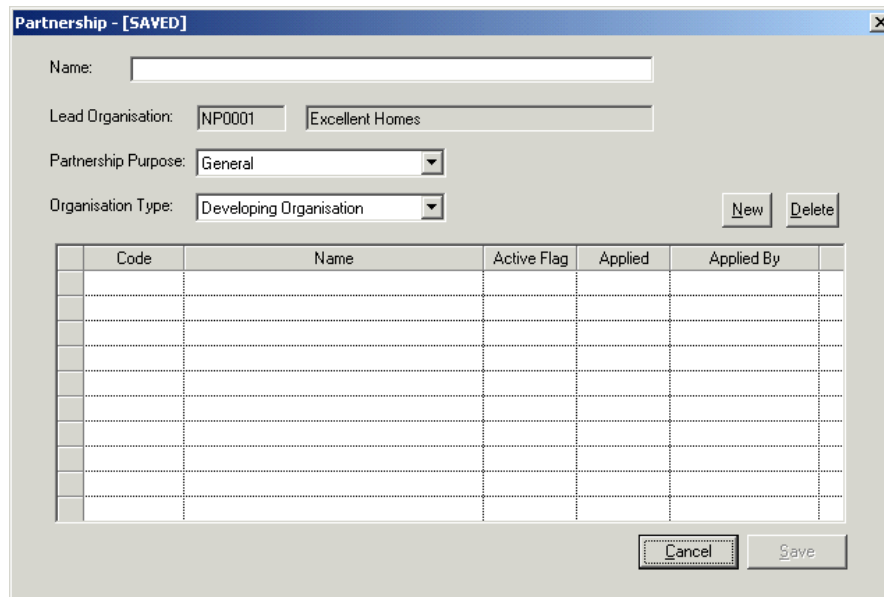

 A screenshot of the 'Partnership Screen for NP0001'. It shows a table with columns for ID, Name, Partner Lead Organisation, Partner Lead Organisation Name, Year, Partnership Status, and Partnership Purpose. The table contains four rows of data.

ID	Name	Partner Lead Organisation	Partner Lead Organisation Name	Year	Partnership Status	Partnership Purpose
4501	First Base Lwl 2008	NP0001	Excellent Homes	2008		
4121	First Base Land Limited 2008	NP0001	Excellent Homes	2008		
2941	First Base Lwl	NP0001	Excellent Homes	2006		
2501	First Base	NP0001	Excellent Homes	2004		

Fig. 7 Partnerships screen

3.2. Creating a HomeBuy Direct Partnership

From the Partnerships screen (*Fig. 7*) select the Create New Partnership icon . The following Create Partnership screen will be displayed:



Partnership - [SAVED]

Name:

Lead Organisation:

Partnership Purpose:

Organisation Type:

Code	Name	Active Flag	Applied	Applied By

Fig.8 Create Partnership screen (not completed)

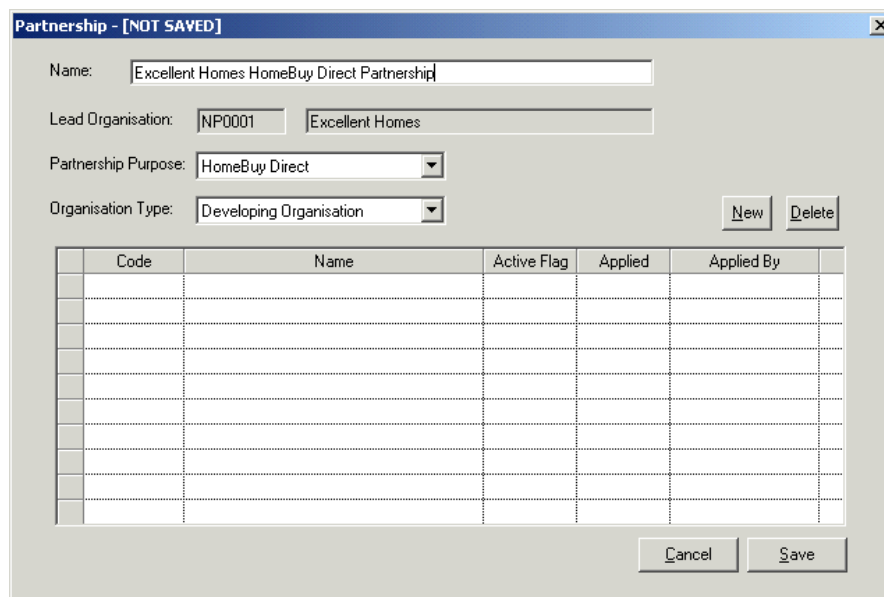
Mandatory fields:

Name

Enter a name for your HomeBuy Direct Partnership

Partnership Purpose

Select **HomeBuy Direct**



Partnership - [NOT SAVED]

Name:

Lead Organisation:

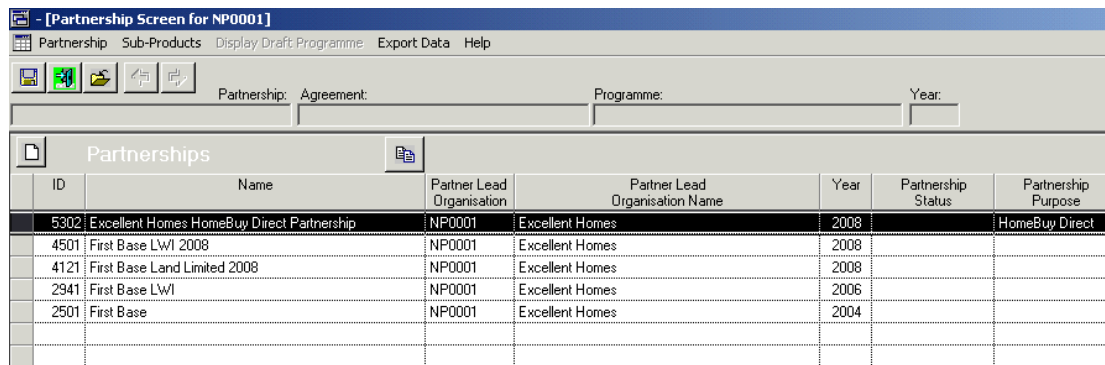
Partnership Purpose:

Organisation Type:

Code	Name	Active Flag	Applied	Applied By

Fig.9 Create Partnership screen with **Name** and **Partnership Purpose** completed

Once you have saved the Create Partnership Screen the system will return you to the Partnerships screen and your new HomeBuy Direct Partnership will be listed:

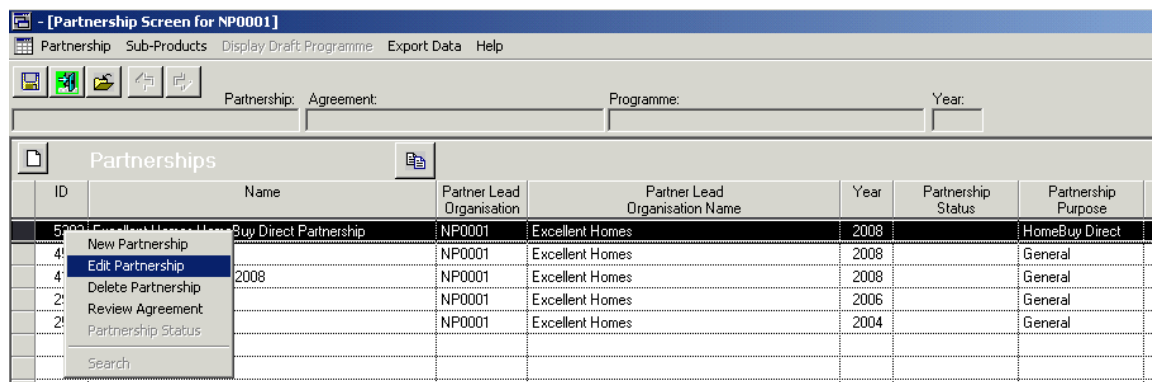


ID	Name	Partner Lead Organisation	Partner Lead Organisation Name	Year	Partnership Status	Partnership Purpose
5302	Excellent Homes HomeBuy Direct Partnership	NP0001	Excellent Homes	2008		HomeBuy Direct
4501	First Base Lwl 2008	NP0001	Excellent Homes	2008		
4121	First Base Land Limited 2008	NP0001	Excellent Homes	2008		
2941	First Base Lwl	NP0001	Excellent Homes	2006		
2501	First Base	NP0001	Excellent Homes	2004		

Fig. 10 Partnership screen with HomeBuy Direct Partnership listed

3.3. Adding Organisations to your HomeBuy Direct Partnership


You can add other Developing, Managing and Owning Organisations to your HomeBuy Direct Partnership by highlighting the row for the Partnership, right-clicking and selecting Edit Partnership.

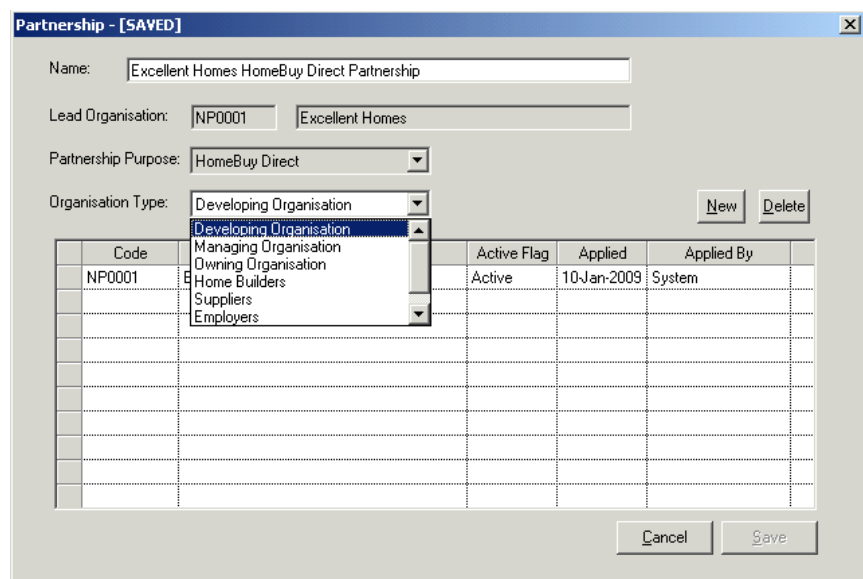


ID	Name	Partner Lead Organisation	Partner Lead Organisation Name	Year	Partnership Status	Partnership Purpose
5302	Excellent Homes HomeBuy Direct Partnership	NP0001	Excellent Homes	2008		HomeBuy Direct
41	New Partnership	NP0001	Excellent Homes	2008		General
4	Edit Partnership	NP0001	Excellent Homes	2008		General
2	Delete Partnership	NP0001	Excellent Homes	2006		General
2	Review Agreement	NP0001	Excellent Homes	2004		General
2	Partnership Status	NP0001	Excellent Homes			

Fig. 11 Partnership menu by right-clicking on the Partnership Row

After selecting **Edit Partnership**, the Partnership screen opposite is then displayed. Use the **Organisation Type** drop-down menu to select whether to add either Developing, Managing or Owning.

To add an organisation simply select  and then enter their organisation code



Partnership - [SAVED]

Name:

Lead Organisation:

Partnership Purpose:

Organisation Type:

Code	Active Flag	Applied	Applied By
NP0001	Active	10-Jan-2009	System

Fig. 12 Edit partnership Screen

4. Setting up a HomeBuy Direct Agreement

4.1 Navigating to the Agreement screen

From the **System Manager** screen select **Bids > Partnership/Specialists > Partnership > Select** > double-click on the row for your **HomeBuy Direct Partnership** > double-click on the row for your **HomeBuy Direct Agreement**. You should then be able to see the following **Agreements** screen:

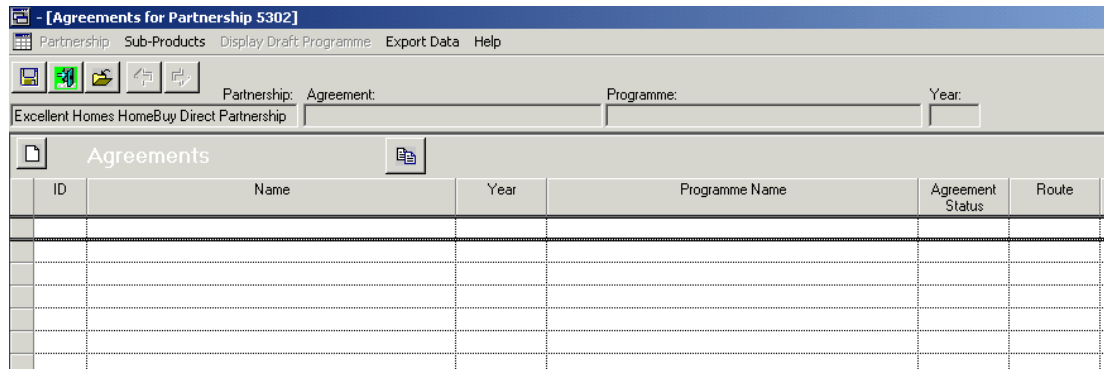


Fig. 13 Agreements Screen (with no Agreements listed)

4.2 Creating a HomeBuy Direct Agreement

Select the Create New Agreement  icon in the Agreements screen. The following New Agreement screen will be displayed:

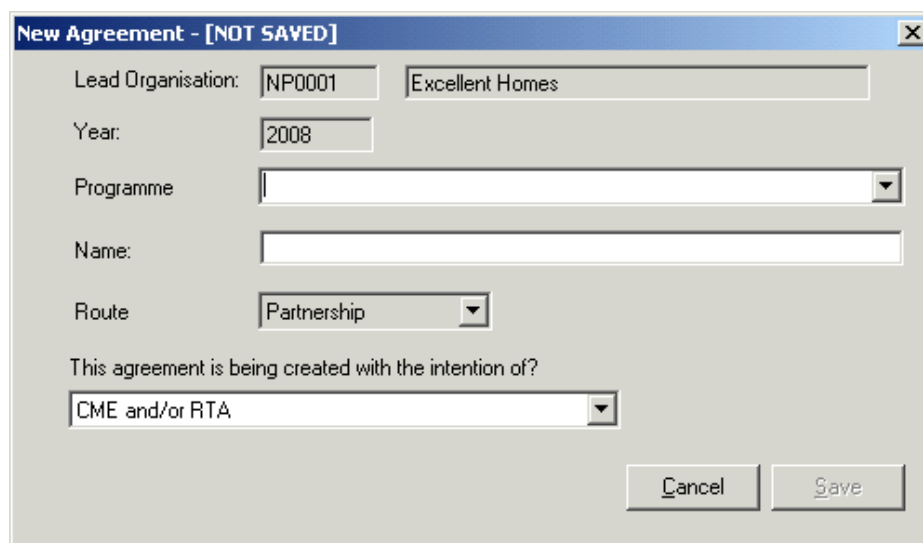


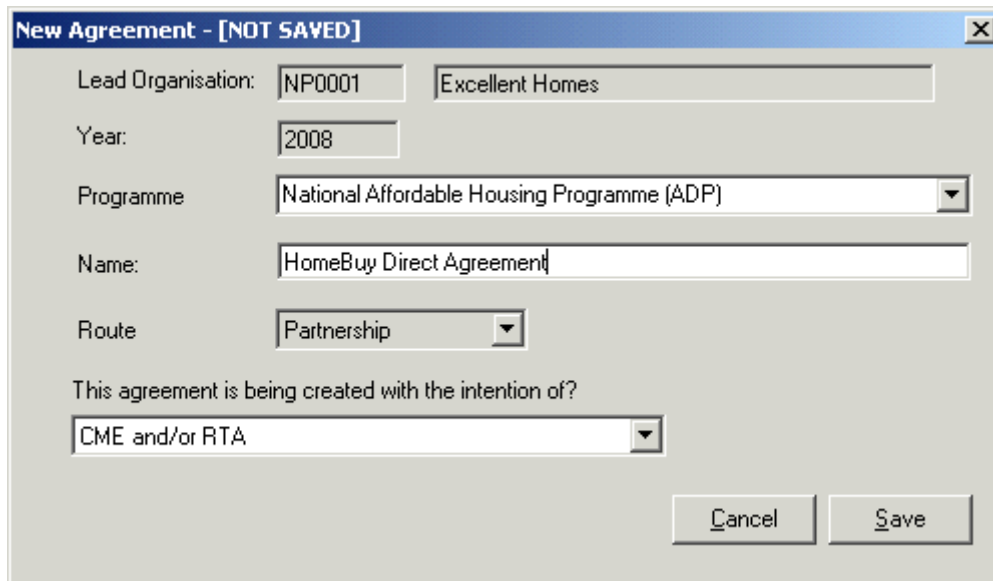
Fig. 14 New Agreement screen (not completed)

Mandatory fields/questions:

Programme: Select **National Affordable Housing Programme**

Name: Please provide a name for your HomeBuy Direct Agreement.

This agreement is being created with the intention of? Please select **CME and/or RTA**. This is the default option. HomeBuy Direct bids will be entered under Continuous Market Engagement (CME) arrangements whereby bids can be submitted all year round.



New Agreement - [NOT SAVED]

Lead Organisation: NP0001 Excellent Homes

Year: 2008

Programme: National Affordable Housing Programme (ADP)

Name: HomeBuy Direct Agreement

Route: Partnership

This agreement is being created with the intention of?
CME and/or RTA

Cancel Save

Fig. 15 New Agreement screen (completed)

5. Inputting a HomeBuy Direct Project

Projects represent the first of two parts of a bid. The second part of the bid is entered through sub-products attached to the Project.

There is no restriction on the number of separate projects which can be input, although it is expected that HomeBuy Direct bids will be grouped together into bids representing multiple units for each site. Multiple units submitted via one bid can subsequently be scheduled into individual single unit schemes later in the process after the bid has been accepted so that the processing of individual purchases can take place.

5.1 Navigating to the Project screen

In the **System Manager** screen select **Bids > Partnership/Specialists > Partnership > Select** > double-click on your **HomeBuy Direct Partnership** row > double-click on your **HomeBuy Direct Agreement** row. You should then be able to see the following Projects screen listing all projects you have entered:

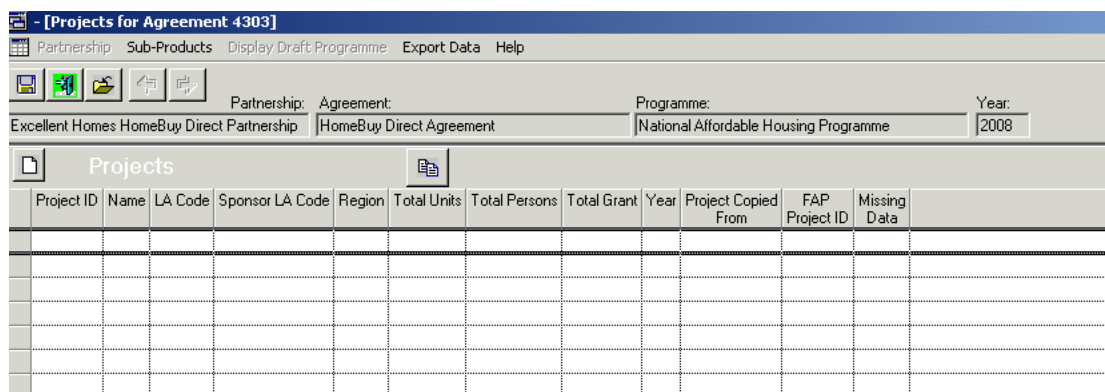



Fig. 16 Projects Screen (no Projects listed yet)

5.2 Creating a New HomeBuy Direct Project

In the Projects Screen (Fig 14. above) select the Create New Project icon . The following New Project screen will be displayed. There are **Scheme** and **Location** tabs within this screen

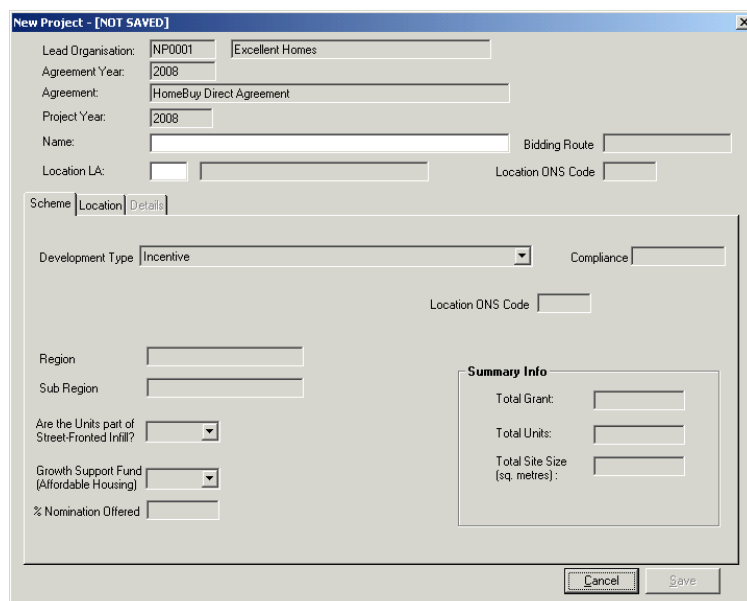


Fig. 75 New Project Screen showing Scheme tab (not completed)

New Project Mandatory fields:

Location LA (Local Authority). Enter the three digit code for the Local Authority.

If you don't know the Local Authority code then right-click in the Location LA field in the project and the LA Search screen opposite will open

You can enter partial Local Authority Code or Name information, select **Find** and the search screen will return all records matching those partial characteristics.

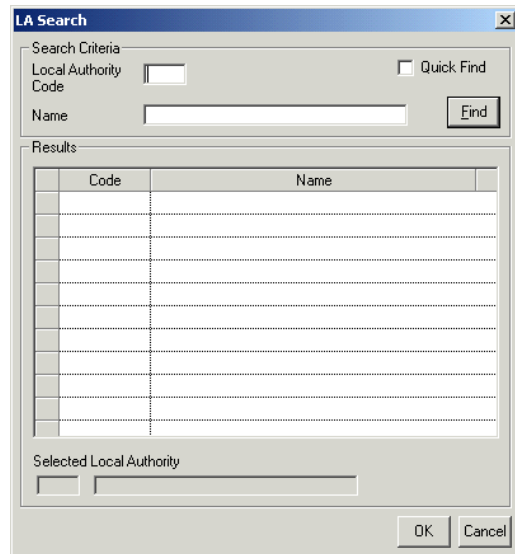


Fig. 18 LA Search screen (unpopulated)

Once you have found the Local Authority you want, highlight the row and select **OK**. The LA Search screen will close and you will return to the Project screen where the Location LA field will be populated with the code for the LA you selected

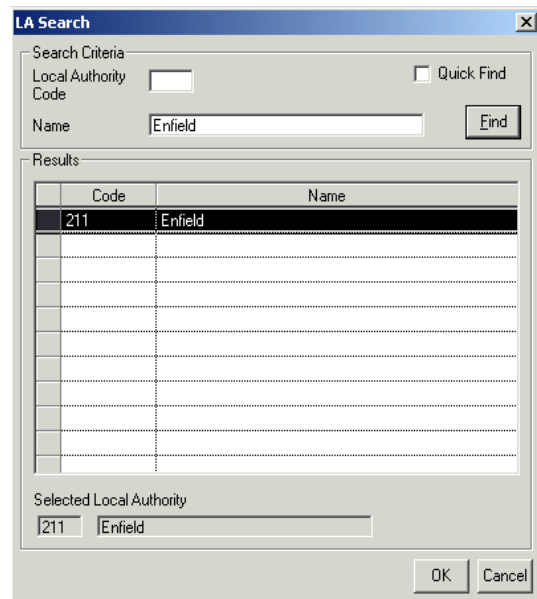


Fig. 19 LA Search screen (populated)

5.3 New Project screen – Scheme Tab

No data needs to be entered in this tab

5.4 New Project Screen – Location tab

OS Co-ordinates – Mandatory field. Please provide OS co-ordinates for the main site.

Postcode – Not mandatory. Please supply post code for main site if available. The system will not accept partial postcodes

Rural Unit – Not mandatory Yes/No

If 'Yes' then Rural Unit Type must be entered: Either population 0-3000 or population 3001- 10000. The Rural Exception Site

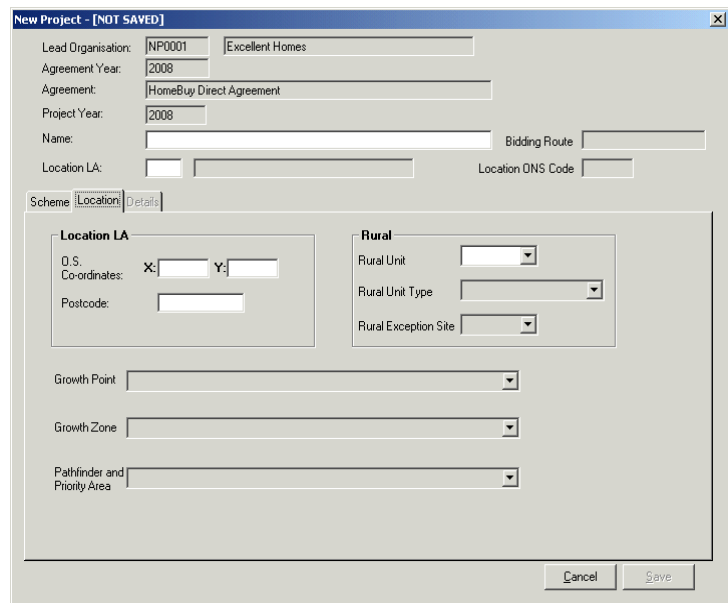
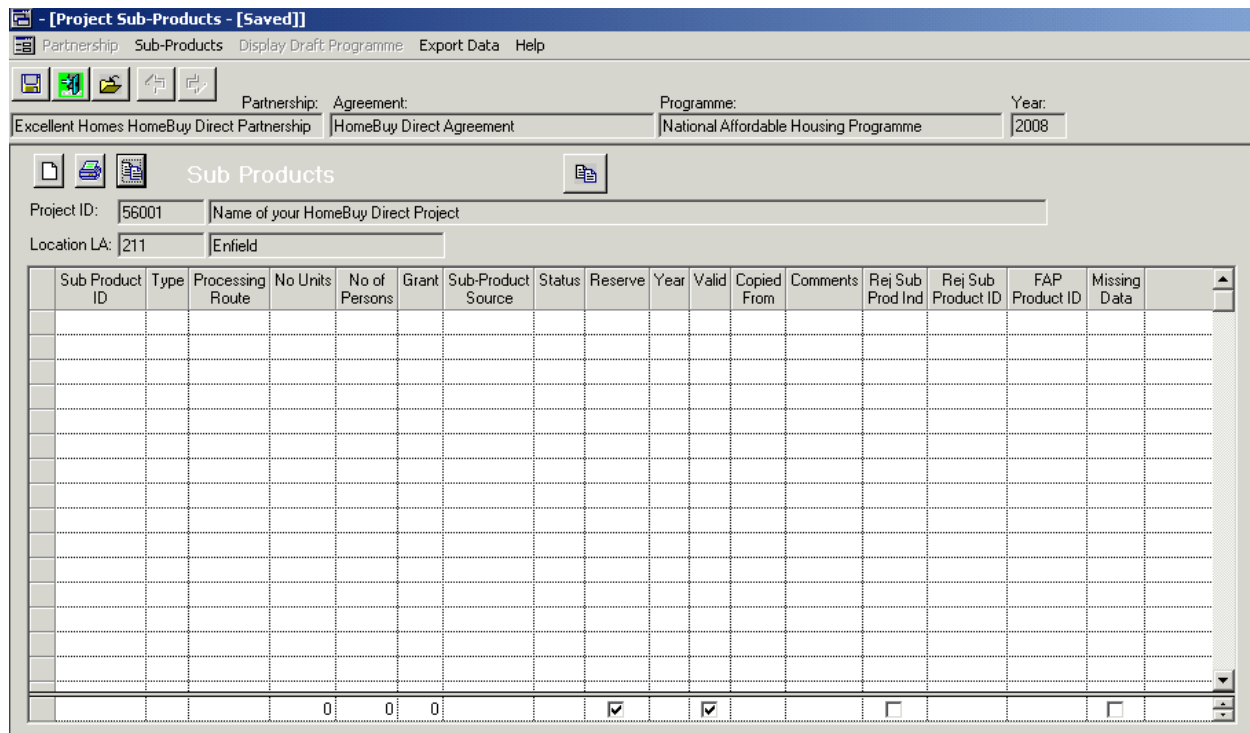


Fig. 20 New Project Location tab

Growth Zone – This field is only available if you have entered a local authority which may be part of a growth zone. You can either select the particular growth zone from the menu or select **Not in a growth zone**.

Once screen complete, press **Save**. After Saving press **Cancel** and the system will take you to the sub-product screen for this project.



Sub Product ID	Type	Processing Route	No Units	No of Persons	Grant	Sub-Product Source	Status	Reserve	Year	Valid	Copied From	Comments	Rej Sub Prod Ind	Rej Sub Product ID	FAP Product ID	Missing Data
			0	0	0			<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>

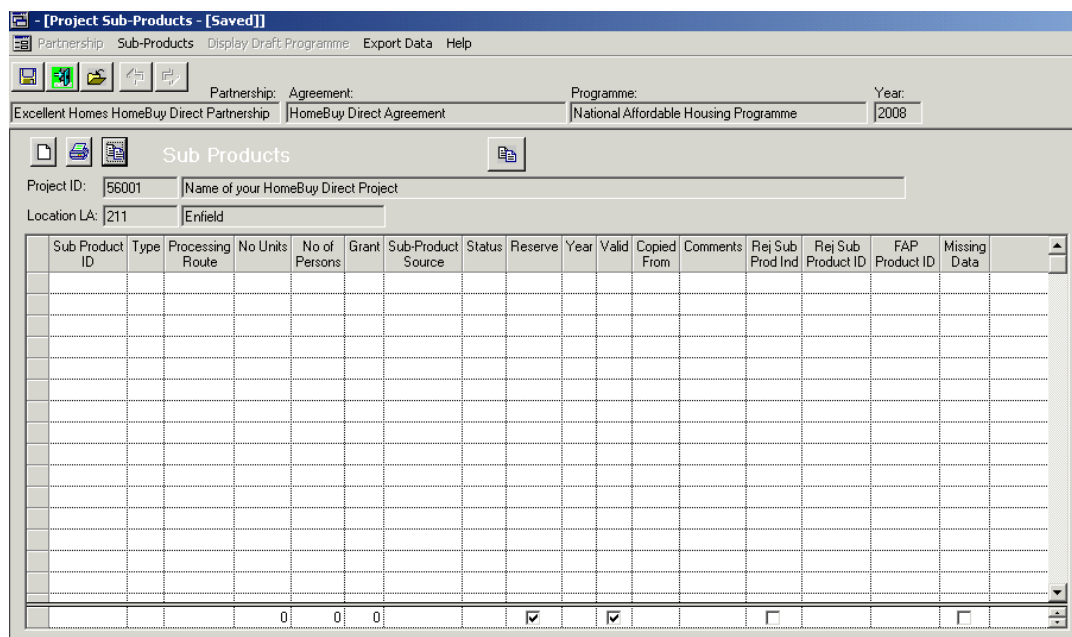
Fig. 21 Sub Products Screen (with no sub products listed)

6. Inputting HomeBuy Direct Sub Products

Sub Products are linked to a Project and represent the second part of the two parts of the bid. This is where the majority of the data is entered for the bid. It is possible to add more than one Sub Product for a Project.


6.1 Navigating to the Sub Product screen

From the **System Manager** screen select **Bids > Partnership/Specialists > Partnership > Select >** double-click on your **HomeBuy Direct Partnership** row > Double-click on your **HomeBuy Direct Agreement** row > Double-click on the row of the **Project** that you want to add the Sub Product to. The following Sub Product screen will be displayed which will display all Sub Products input for that Project:



The screenshot shows the 'Project Sub-Products' screen. At the top, there are fields for Partnership (Excellent Homes HomeBuy Direct Partnership), Agreement (HomeBuy Direct Agreement), Programme (National Affordable Housing Programme), and Year (2008). Below these are fields for Project ID (56001) and Name of your HomeBuy Direct Project. There are also fields for Location LA (211) and Enfield. The main area is a table with the following columns: Sub Product ID, Type, Processing Route, No Units, No of Persons, Grant, Sub-Product Source, Status, Reserve, Year, Valid, Copied From, Comments, Rej Sub Prod Ind, Rej Sub Product ID, FAP Product ID, Missing Data. The table is currently empty. At the bottom, there are summary statistics: 0 units, 0 persons, 0 grants, and checkboxes for Reserve, Valid, Copied From, and Missing Data.

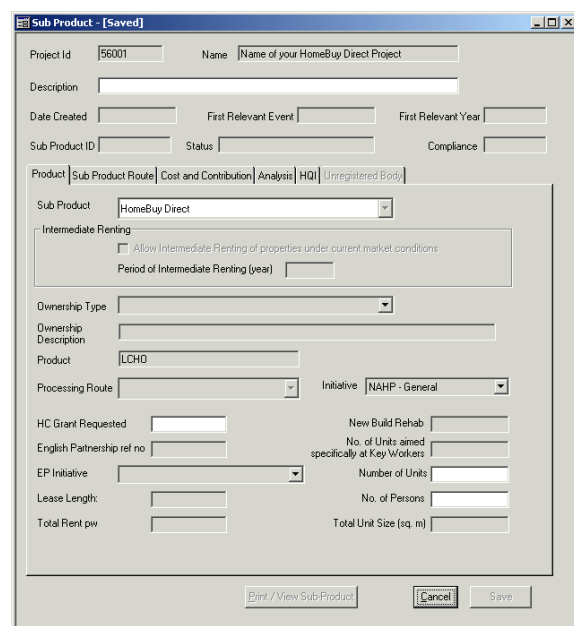
Fig. 22 Sub Products Screen (with no sub products listed)

In the above Sub-Product screen select the new sub product  icon to view the Sub-Product screen

6.2 The Sub Product Screen

Description

This is a mandatory field and the description entered will be carried forward to allocation if the bid is successful. Please try to ensure that the description you enter for each sub-product is one which will make it easily identifiable for you in any subsequent list of allocations. For example, please try to avoid generic descriptions such as 'HomeBuy units'.



The screenshot shows the 'Sub Product' screen. It has fields for Project Id (56001), Name (Name of your HomeBuy Direct Project), Description, Date Created, First Relevant Event, First Relevant Year, Sub Product ID, Status, and Compliance. There are tabs for Product, Sub Product Route, Cost and Contribution, Analysis, HQI, and Unregistered Body. The 'Sub Product' dropdown is set to 'HomeBuy Direct'. There is a checkbox for 'Allow Intermediate Renting of properties under current market conditions' and a field for 'Period of Intermediate Renting (year)'. Other fields include Ownership Type, Ownership Description, Product (LCHD), Processing Route, Initiative (NAHP - General), HC Grant Requested, New Build Rehab, English Partnership ref no, No. of Units aimed specifically at Key Workers, EP Initiative, Number of Units, Lease Length, No. of Persons, Total Rent pw, and Total Unit Size (sq. m). At the bottom, there are buttons for Print / View Sub-Product, Cancel, and Save.

Fig. 23 Individual Sub Product screen

6.3 Sub Product Screen – Product Tab

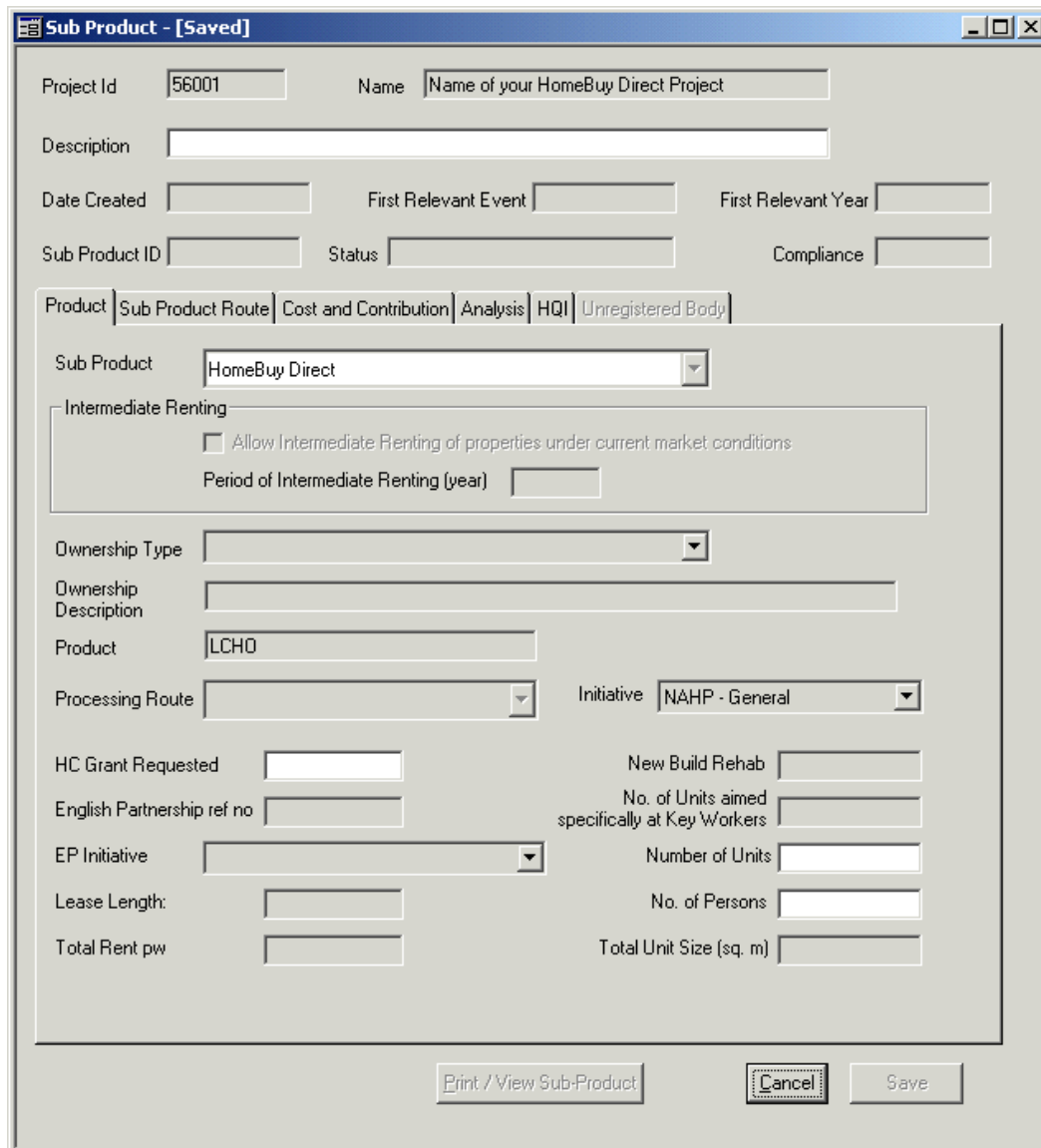
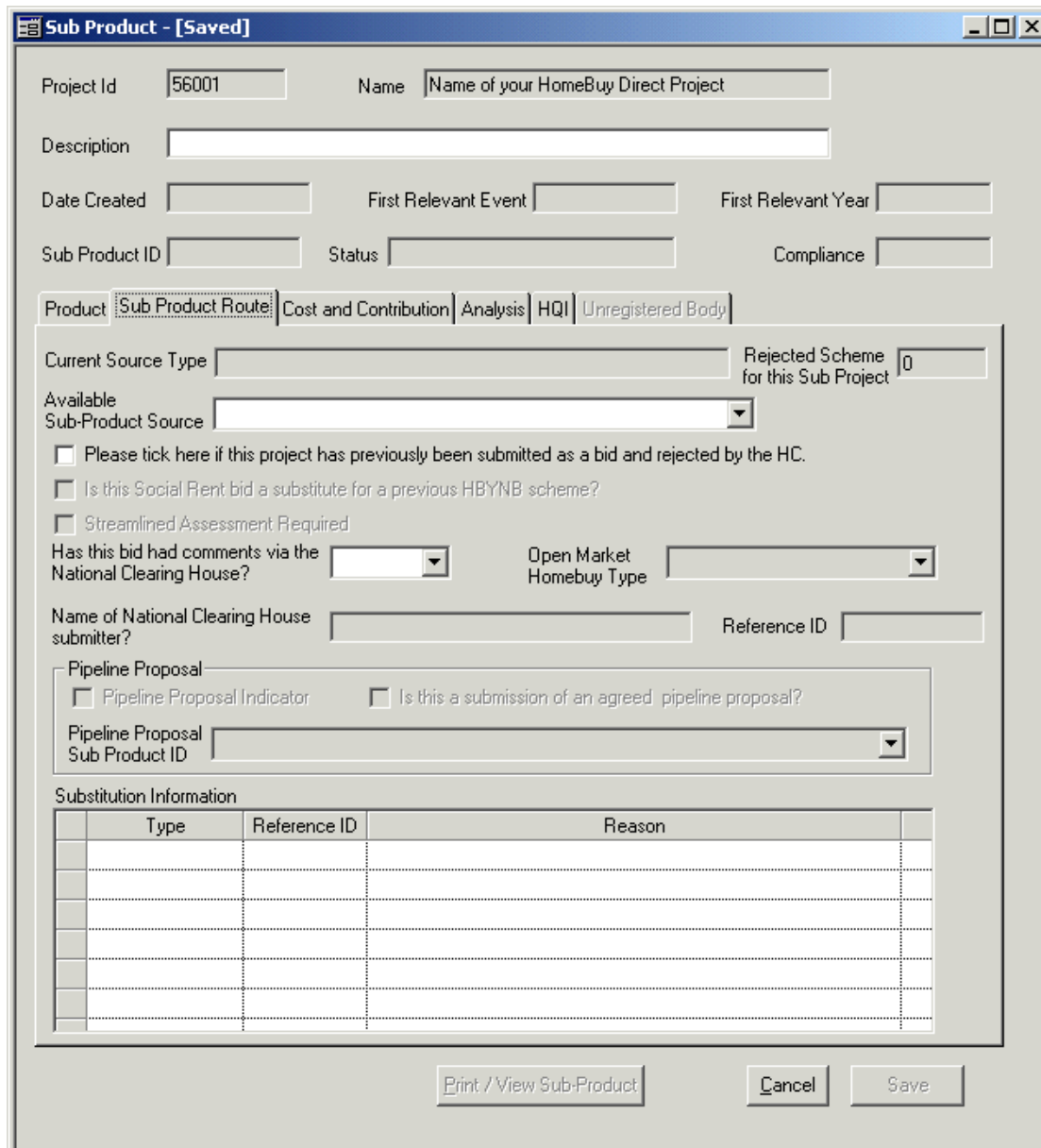


Fig. 24 Sub Product Screen showing Product tab (not completed)

Mandatory fields:

- **HC Grant Requested**
- **Number of Units**
- **No of Persons**

6.4 Sub Product Screen – Sub Product RouteTab



Project Id Name

Description

Date Created First Relevant Event First Relevant Year

Sub Product ID Status Compliance

Product: **Sub-Product Route** | Cost and Contribution | Analysis | HQI | Unregistered Body

Current Source Type Rejected Scheme for this Sub Project

Available Sub-Product Source

Please tick here if this project has previously been submitted as a bid and rejected by the HC.

Is this Social Rent bid a substitute for a previous HBYNB scheme?

Streamlined Assessment Required

Has this bid had comments via the National Clearing House? Open Market Homebuy Type

Name of National Clearing House submitter? Reference ID

Pipeline Proposal

Pipeline Proposal Indicator Is this a submission of an agreed pipeline proposal?

Pipeline Proposal Sub Product ID

Substitution Information

Type	Reference ID	Reason

Fig. 25 Sub Product Screen showing Sub-Product Route tab (not completed)

Mandatory fields

Available Sub-Product source

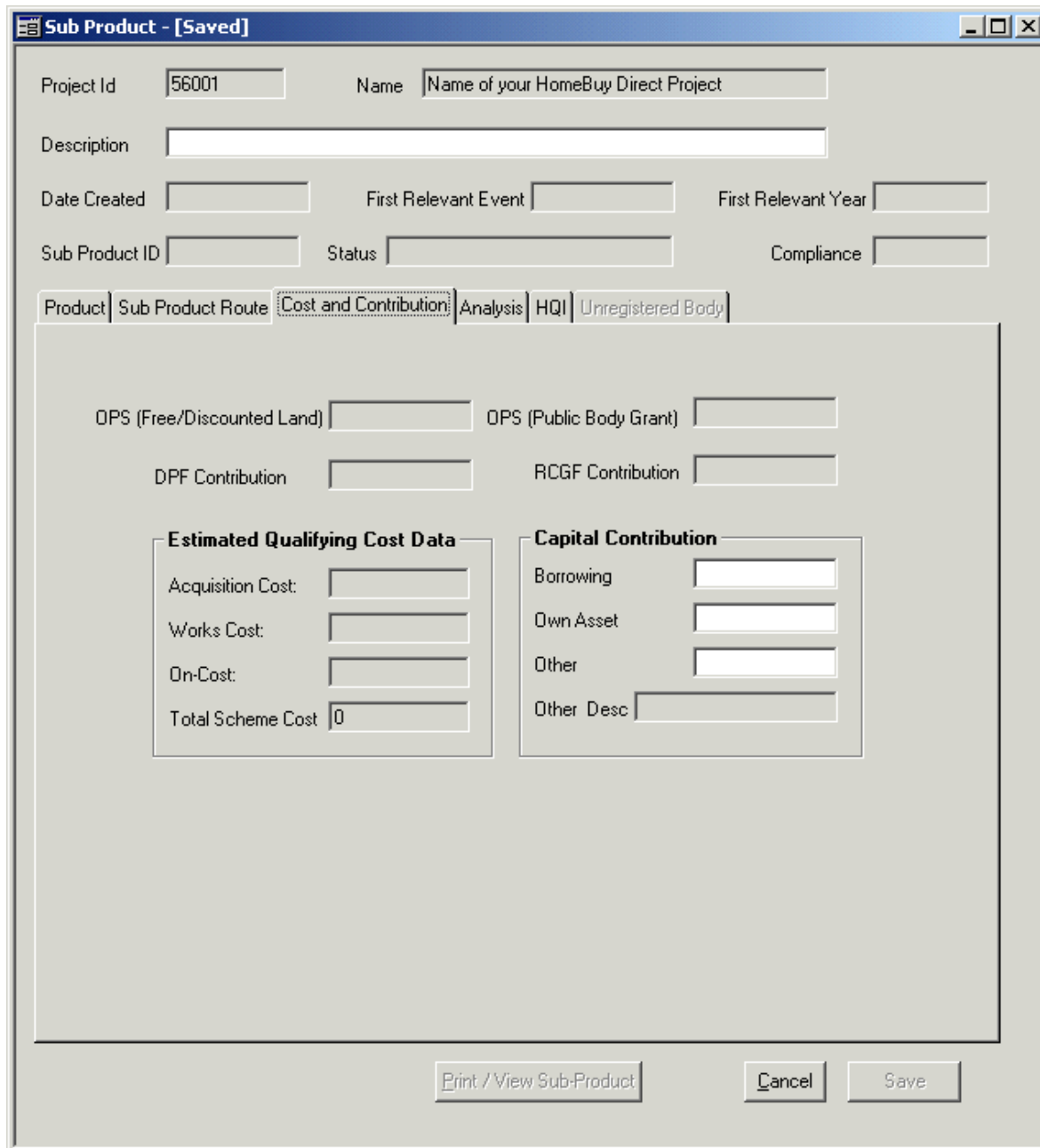
You must select the default option **Continuous Market Engagement**

Has this bid had comments via the National Clearing House? Please select **No**. Not relevant.

Optional check-box field

Please tick here if the project has previously been submitted as a bid and rejected by the HC . Please do not tick this check-box. Not relevant

6.5 Sub Product Screen –Cost and Contribution Tab



Project Id Name

Description

Date Created First Relevant Event First Relevant Year

Sub Product ID Status Compliance

Product | Sub Product Route | **Cost and Contribution** | Analysis | HQI | Unregistered Body

OPS (Free/Discounted Land) OPS (Public Body Grant)

DPF Contribution RCGF Contribution

Estimated Qualifying Cost Data

Acquisition Cost:

Works Cost:

On-Cost:

Total Scheme Cost

Capital Contribution

Borrowing

Own Asset

Other

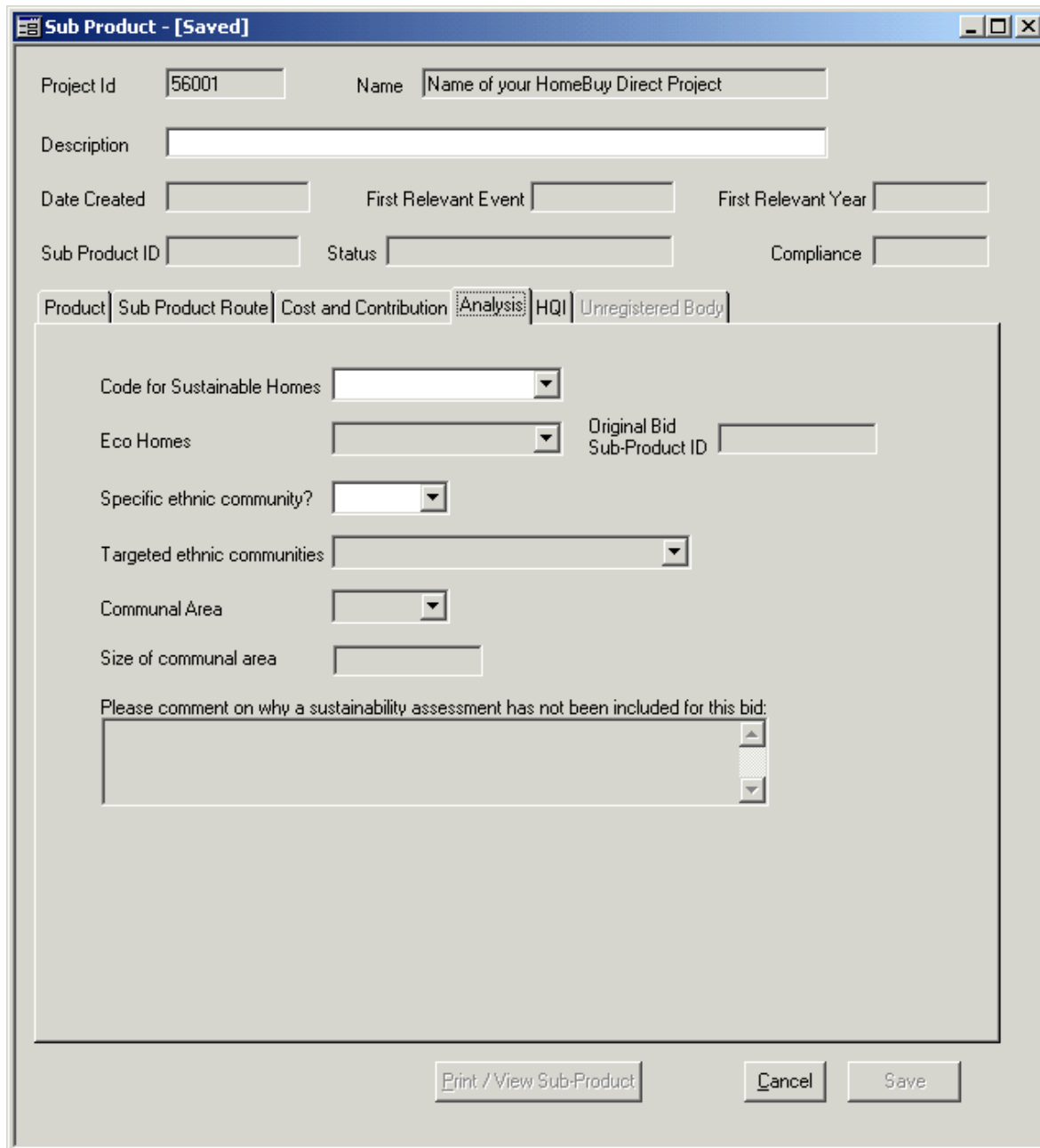
Other Desc

Fig. 26 Sub Product Screen showing cost and contribution tab (not completed)

Optional fields. If no data entered the value for each field defaults to zero.

- **Capital Contribution**
- **Borrowing**
- **Own Asset**
- **Other** - If Other amount is more than zero is entered then a description of the Other contribution must be entered in the **Other Desc** field.

6.6 Sub Product Screen –Cost and Contribution Tab



Sub Product - [Saved]

Project Id Name

Description

Date Created First Relevant Event First Relevant Year

Sub Product ID Status Compliance

Product | Sub Product Route | Cost and Contribution | **Analysis** | HQI | Unregistered Body

Code for Sustainable Homes

Eco Homes Original Bid Sub-Product ID

Specific ethnic community?

Targeted ethnic communities

Communal Area

Size of communal area

Please comment on why a sustainability assessment has not been included for this bid:

Fig. 27 Sub Product Screen showing Analysis tab (not completed)

Mandatory Fields

- Code for Sustainable Homes**
 Drop-down menu. If N/A selected then Eco Homes field must also be completed. This should correspond to the data submitted as part of the HomeBuy Direct Competition.
- Eco Homes**
 Drop-down menu. If N/A selected then comment has to be added in the **Please comment on why a sustainability assessment has not been included for this bid**. This should correspond to the data submitted as part of the HomeBuy Direct Competition

6.7 Maintain Forecast

Forecast and milestone information needs to be entered for each of your HomeBuy Direct sub-products.

To access the forecast screen, highlight the sub-product in the Sub-Products screen and right-click to see the sub product menu.

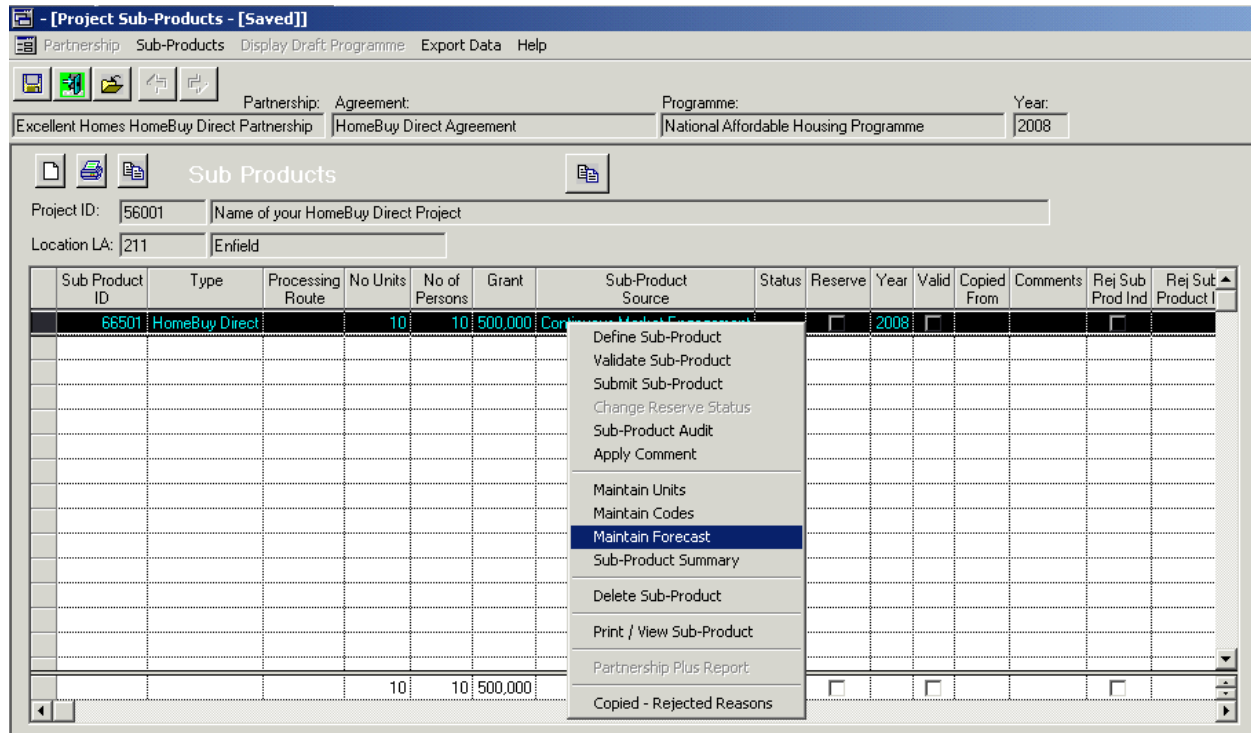


Fig. 28 Sub Product menu with Maintain Forecast option highlighted

Select **Maintain Forecast** from the above menu. The following **Sub-Product – Maintain Forecast and Milestones** screen will open.

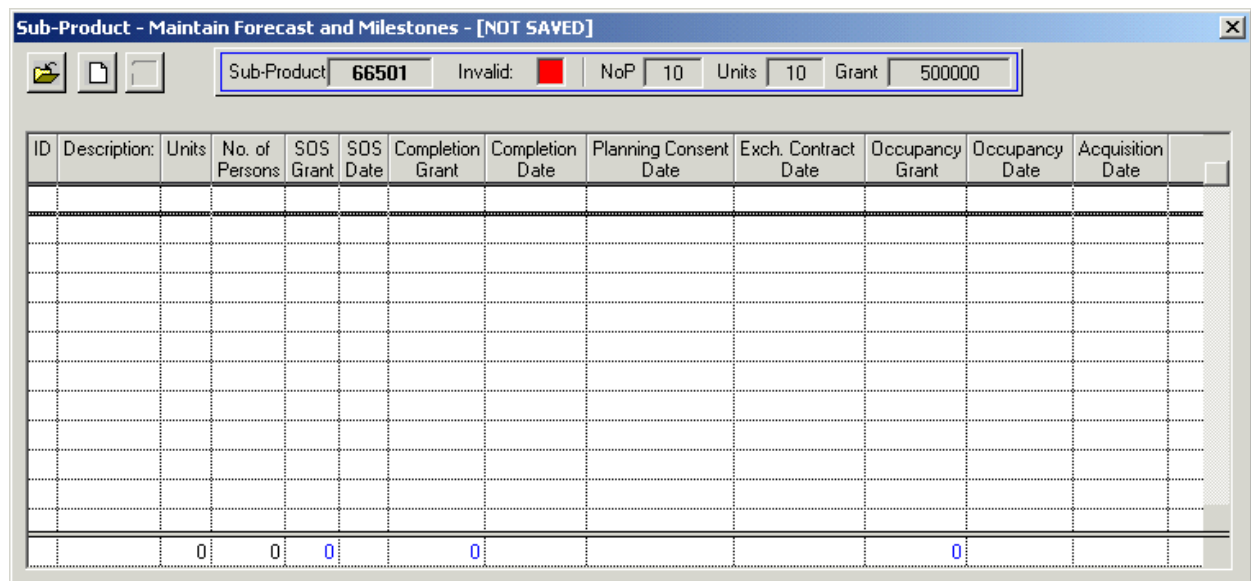



Fig. 29 The Sub Product - Maintain Forecast and Milestones screen

Select the New Forecast icon  and the following **Enter Sub-Product Milestone Event** screen will open:

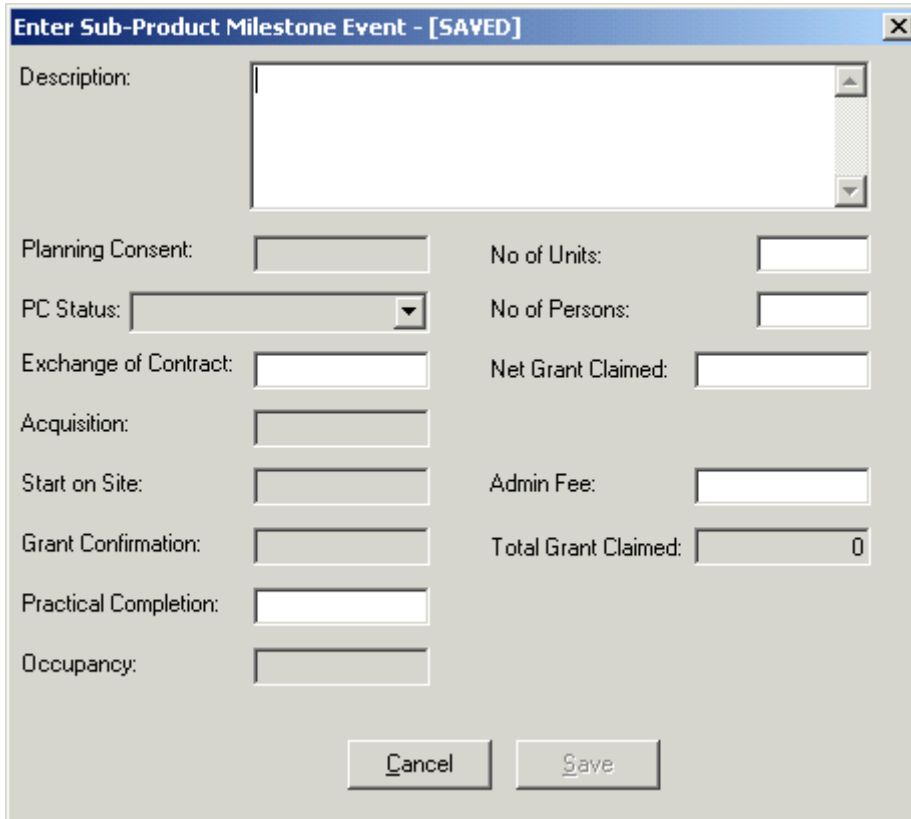


Fig. 30 Enter Sub-Product Milestone Event screen (not completed)

Mandatory Fields

- **Description** -Can be the same as the sub-product description covered by 6.2 above.
- **Exchange of Contracts – Date Field. Right click in the field to access the IMS calendar**
- **Practical Completion – Date Field. Right click in the field to access the IMS calendar**
- **No. of Units**
- **No. of Persons**
- **Net Grant Claimed** (Net Grant + Admin Fee must equal total HC Grant Claimed in bid)
- **Admin Fee** - Fee per unit x no. of units

Save the screen once you have entered all of the data. As there are still stages to be completed to validate Sub Product, the following list of Errors will then be displayed with details of what remaining information needs to be added to complete the sub-product so it can be validated.

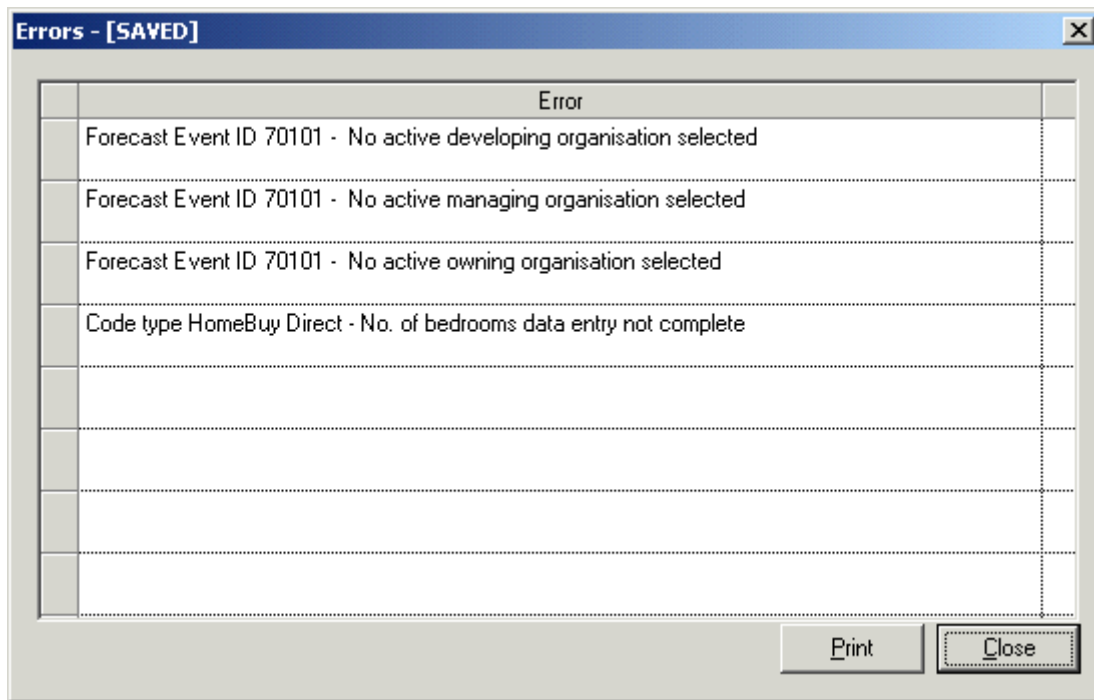
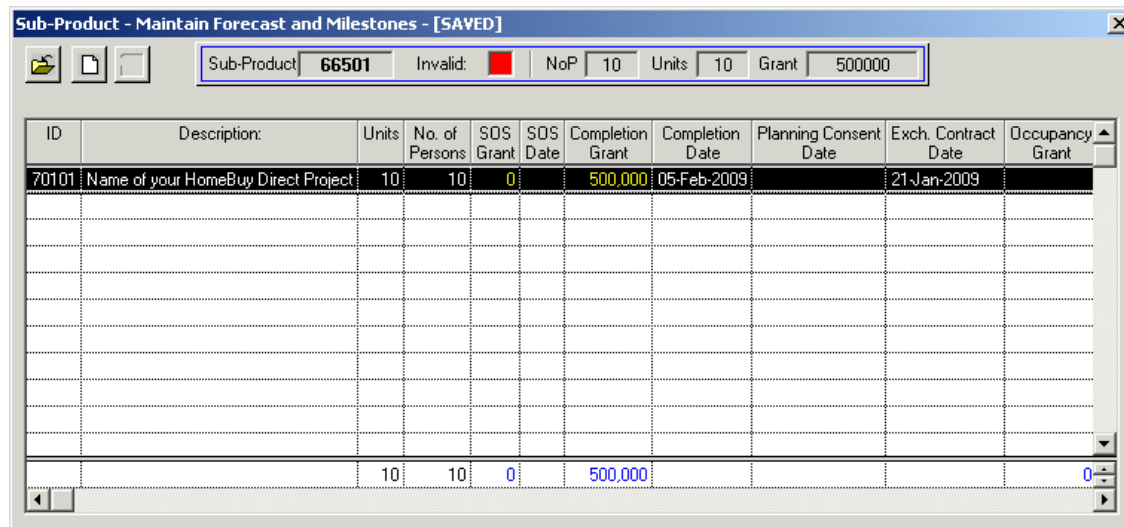


Fig. 31 Errors screen after saving data in the Enter Sub-Product Milestone Event screen

A further message will also be displayed stating that the Sub-Product Data Status is now set to "Invalid"

6.8 Selecting Active Developing, Managing and Owning Organisations

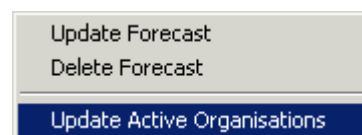
Having saved the forecast data in the Sub-Product Milestone Event screen (section 6.7) you will now have an entry within the Maintain Forecast screen (accessed by right-clicking on the sub-product and selecting Maintain Forecast)



ID	Description:	Units	No. of Persons	SOS Grant	SOS Date	Completion Grant	Completion Date	Planning Consent Date	Exch. Contract Date	Occupancy Grant
70101	Name of your HomeBuy Direct Project	10	10	0		500,000	05-Feb-2009		21-Jan-2009	
		10	10	0		500,000				0

Fig. 32 Sub Product – Maintain Forecast and Milestones screen

Highlight the row and right-click to see the menu opposite. Select **Update Active Organisation**

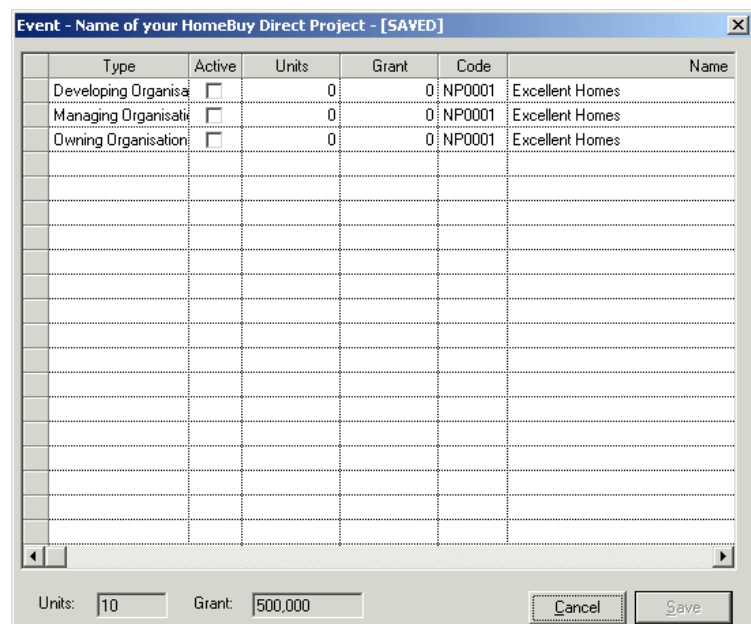


The update active organisations screen will be displayed. This lists all Developing, Managing and Owning Organisation within your partnership.

If you have more than one of each then you need to specify who will be the Developing Organisation – The Developing Organisation processes the schemes and payment within IMS.

You also need to specify who will be the Managing and Owning Organisations.

To select Developing Organisation – tick the Active column for the Developing Organisation. Do not enter units and grant.

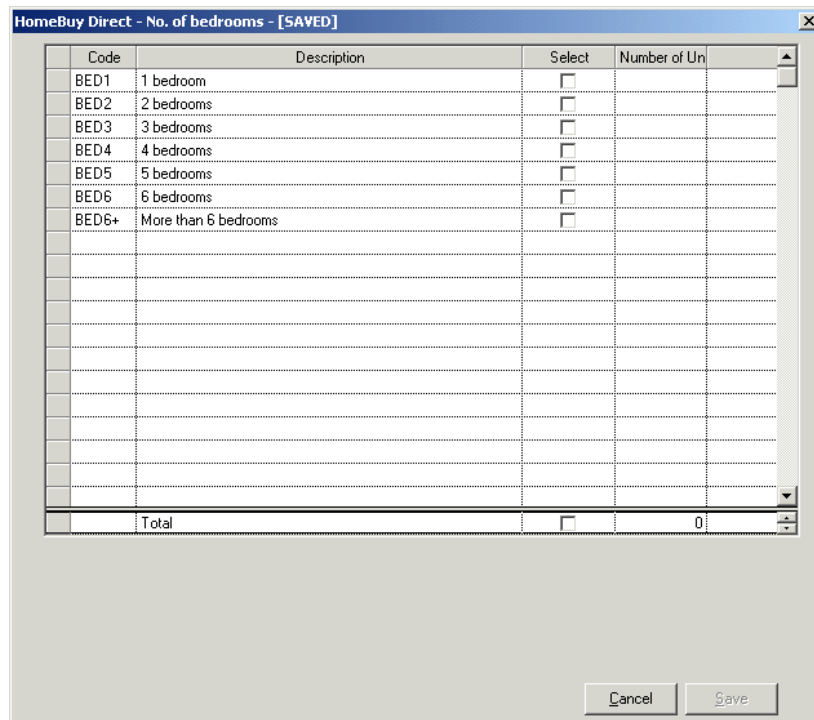


Type	Active	Units	Grant	Code	Name
Developing Organisation	<input type="checkbox"/>	0	0	NP0001	Excellent Homes
Managing Organisation	<input type="checkbox"/>	0	0	NP0001	Excellent Homes
Owning Organisation	<input type="checkbox"/>	0	0	NP0001	Excellent Homes

Fig. 33 Update Active organisations Screen

To select Managing Organisation - tick the Active column for the Managing Organisation. Enter the number of units and amount of grant specified in the Sub Product.

The following screen will be displayed. Please indicate how many of the units fall into each of the bedroom categories and save the screen.



The screenshot shows a window titled "HomeBuy Direct - No. of bedrooms - [SAVED]". It contains a table with the following columns: Code, Description, Select, and Number of Units. The rows are as follows:

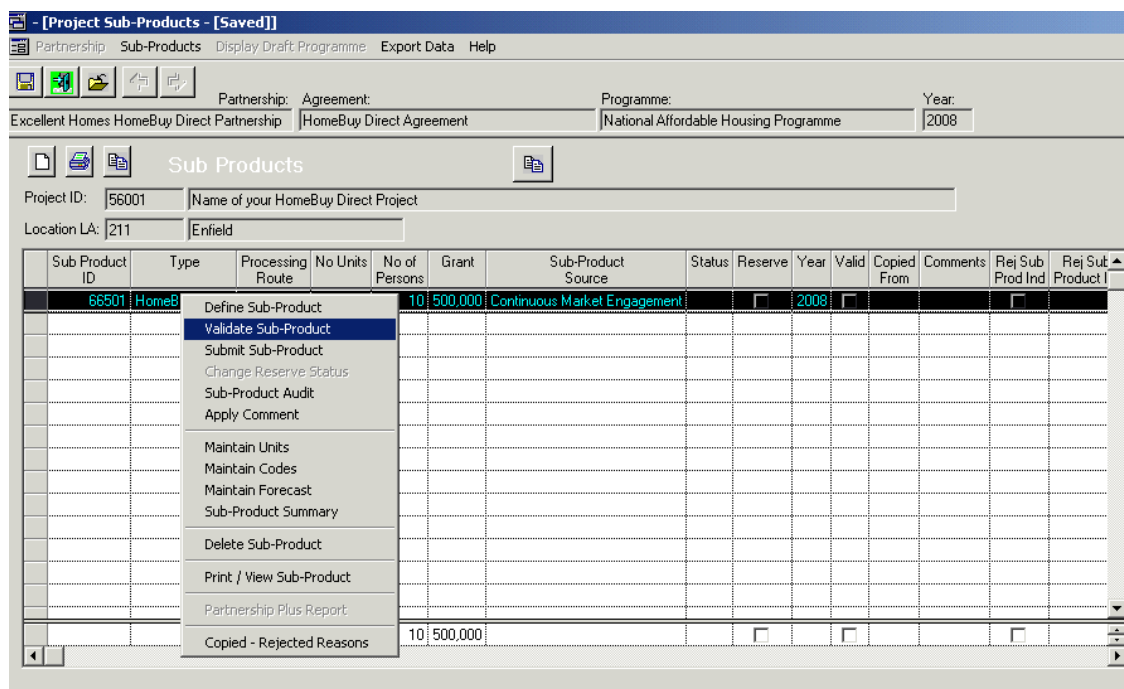
Code	Description	Select	Number of Units
BED1	1 bedroom	<input type="checkbox"/>	
BED2	2 bedrooms	<input type="checkbox"/>	
BED3	3 bedrooms	<input type="checkbox"/>	
BED4	4 bedrooms	<input type="checkbox"/>	
BED5	5 bedrooms	<input type="checkbox"/>	
BED6	6 bedrooms	<input type="checkbox"/>	
BED6+	More than 6 bedrooms	<input type="checkbox"/>	
Total			0

At the bottom of the window are "Cancel" and "Save" buttons.

Fig. 36 HomeBuy Direct – No. of Bedrooms screen

6.10 Validating the Sub-Product

In order to check that all the sub-product data has been entered correctly, highlight the sub-product in the Sub Products screen and right-click to see the sub-product menu:



The screenshot shows the "Project Sub-Products - [Saved]" window. The top menu bar includes "Partnership", "Sub-Products", "Display Draft Programme", "Export Data", and "Help". The main area shows fields for "Project ID: 56001", "Location LA: 211", and "Enfield". Below these is a table of sub-products. The first row is highlighted, and a context menu is open over it.

Sub Product ID	Type	Processing Route	No Units	No of Persons	Grant	Sub-Product Source	Status	Reserve	Year	Valid	Copied From	Comments	Rej Sub Prod Ind	Rej Sub Product I
66501	HomeB	Define Sub-Product		10	500,000	Continuous Market Engagement		<input type="checkbox"/>	2008	<input type="checkbox"/>			<input type="checkbox"/>	
<ul style="list-style-type: none"> Define Sub-Product Validate Sub-Product Submit Sub-Product Change Reserve Status Sub-Product Audit Apply Comment Maintain Units Maintain Codes Maintain Forecast Sub-Product Summary Delete Sub-Product Print / View Sub-Product Partnership Plus Report Copied - Rejected Reasons 														
				10	500,000			<input type="checkbox"/>		<input type="checkbox"/>			<input type="checkbox"/>	

Fig. 37 Validate Sub-Product menu item

From the menu select **Validate Sub-Product**

If there are no errors in the Sub Product then the following message will be displayed:

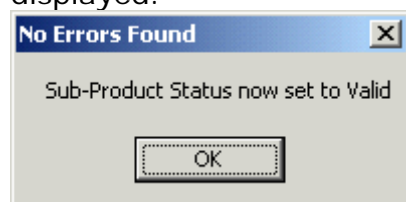


Fig. 38 Sub product set to valid message

If there are any errors the system will display them in an errors window:

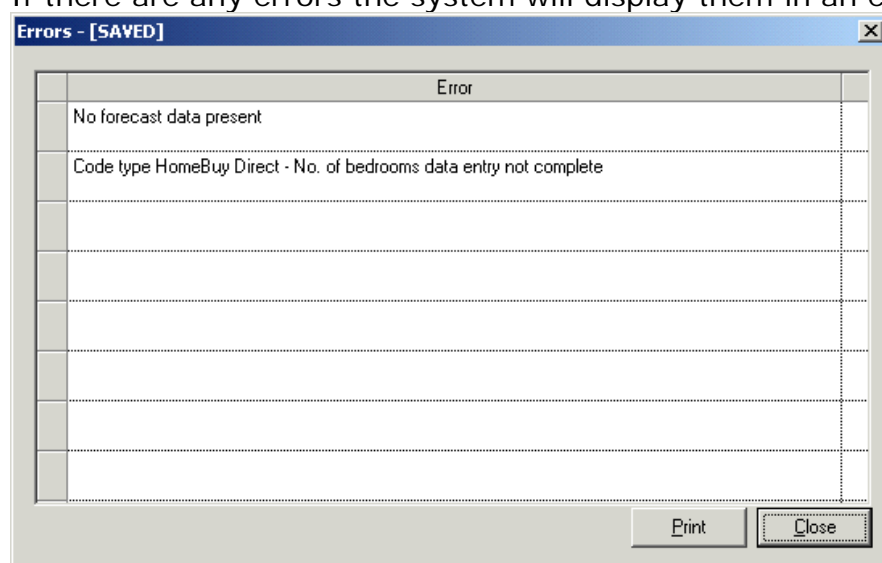


Fig. 39 Validation Errors

6.11 Submitting individual Sub Products

If you had already submitted your HomeBuy Direct Agreement and it had been approved, you would be able to submit Sub Products individually once they are validated. However, no Provider will be in this position when HomeBuy Direct is launched and so all Providers will have to submit sub-products via the HomeBuy Direct Agreement (see section 7)

To submit an individual Sub Product, right-click on the relevant sub product and select Submit Sub-Product from the menu.

7. Submitting your HomeBuy Direct Agreement

Once all bids have been entered and validated the agreement should be submitted.

To submit your HomeBuy Direct Agreement, go to the Agreement record, right-click and select Agreement Status:

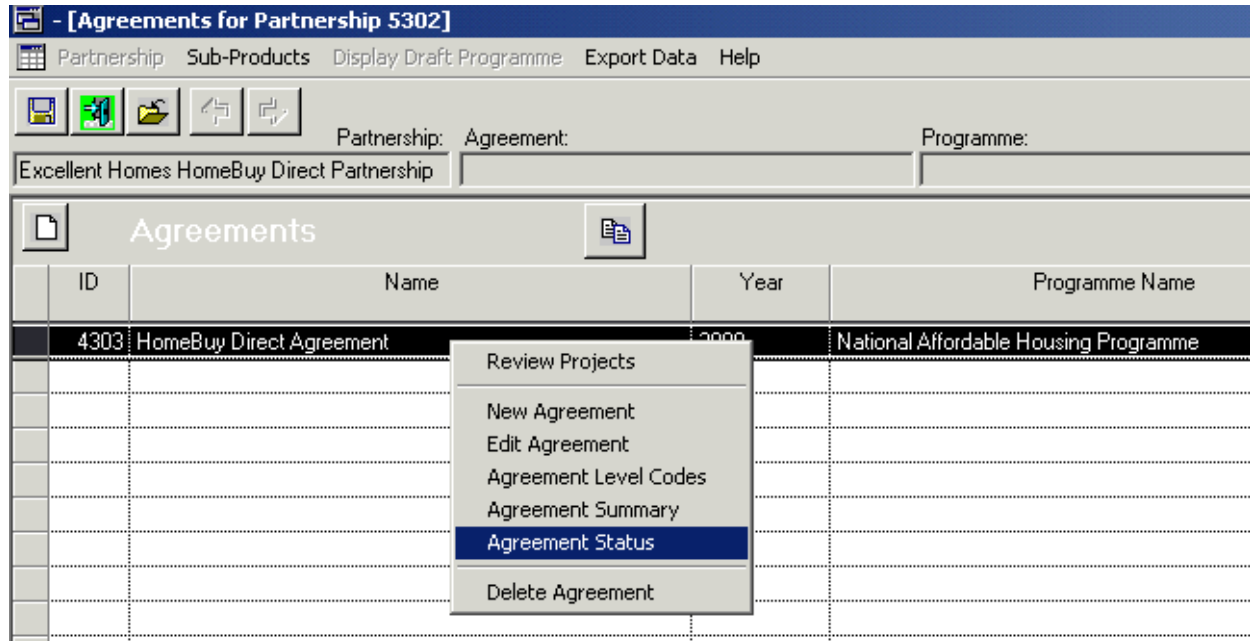


Fig. 40 Select Agreement Status

The following Agreement Status screen will be displayed:

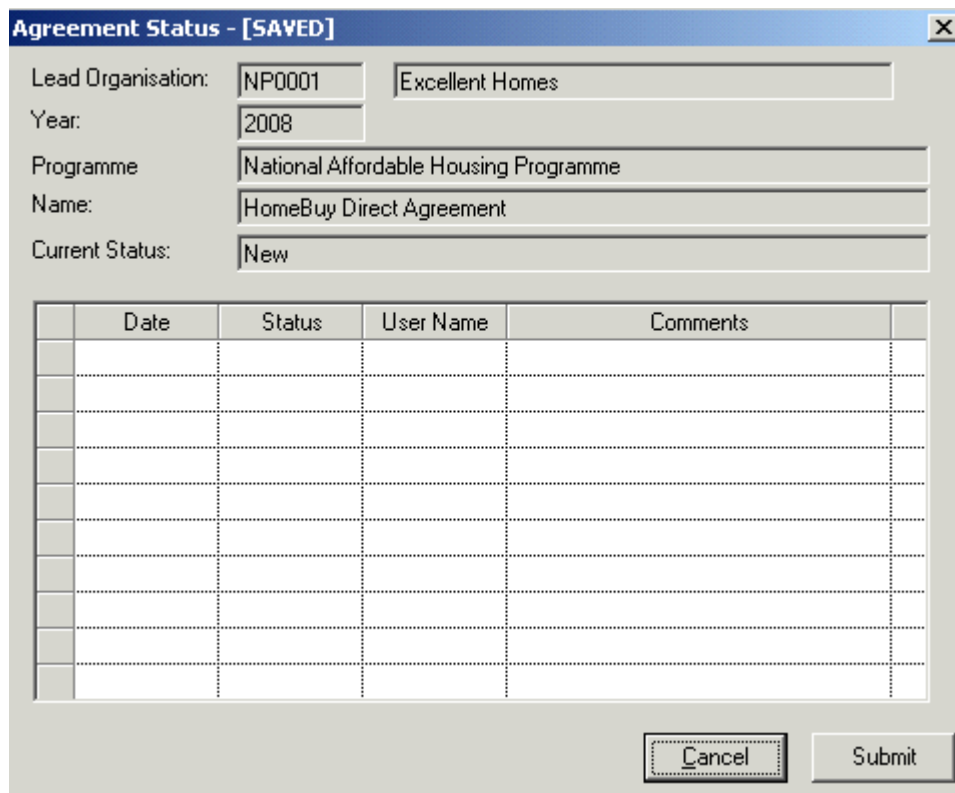


Fig. 41 Agreement Status screen

Select **Submit** and the following **Submit HomeBuy Direct Agreement** screen will be displayed:

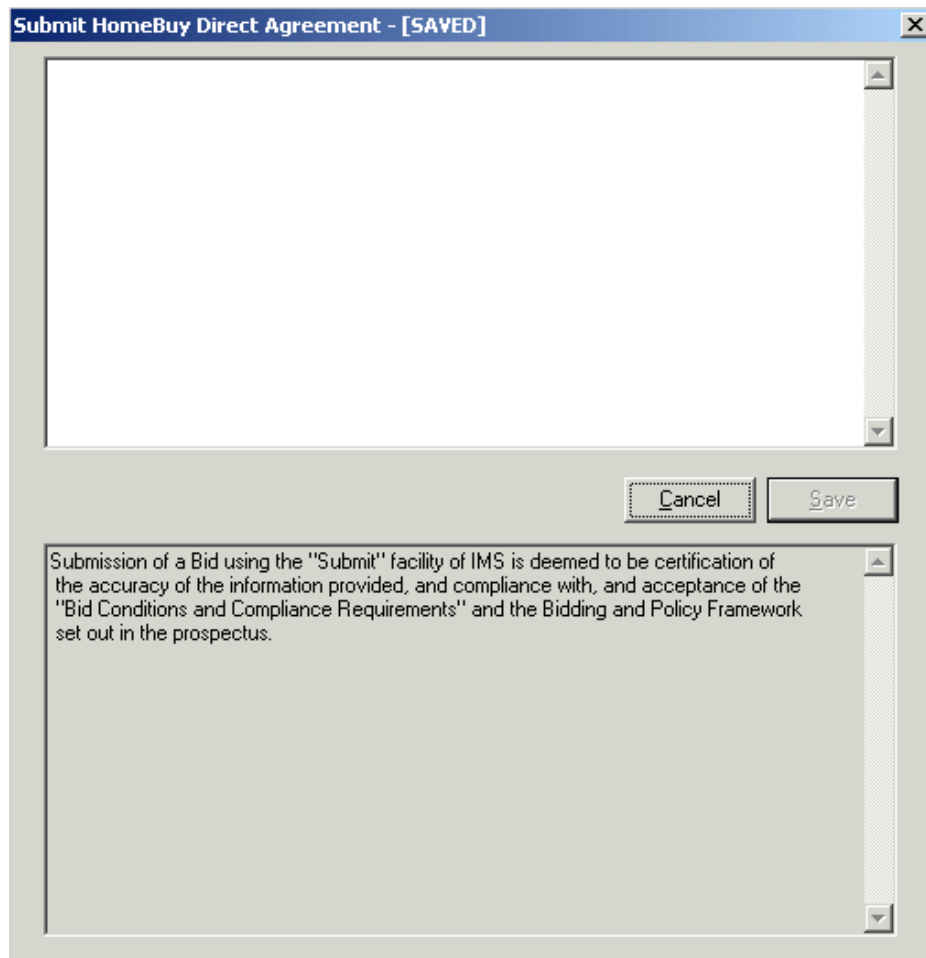


Fig. 42 Submit HomeBuy Direct Agreement screen

Enter a submission comment in the upper dialogue box and press save.

Your Agreement, including all validated sub-products within the Agreement will now have been submitted to the HCA.

When you return to the Agreement screen you will see that the Agreement status has been updated to **Submitted**. This marks the completion of the HomeBuy Direct bid submission process.

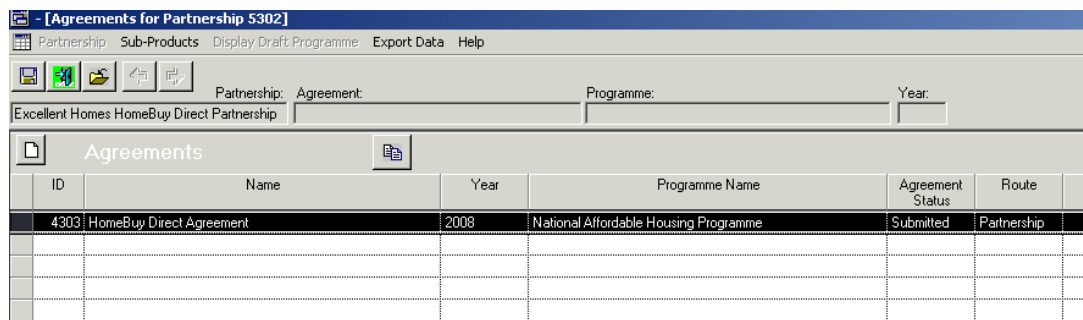


Fig. 43 Agreement screen showing updated Agreement status

8. Next steps – Allocations, Scheme and Payment Processing

Further HomeBuy Direct Guidance will be issued in the week beginning 19 January covering these next step when access to that part of the system is available.

Annex 1 – Quick Guide to adding a new user with the authority required to submit HomeBuy Direct bids in IMS

In order to enter HomeBuy Direct Bids following the process set out in the guidance above you will need to have a Userid in IMS with the correct security authorities attached. Those required for entering bids are as follows:

URB users (organisations with code prefixed NPXXXX)

URB Partnership Sign-Off
URB Maintain Forecast
Unregistered Body Maintain Agreement
Unregistered Body Submit Agreement
Unregistered Body Submit Sub-Project

RSL users:

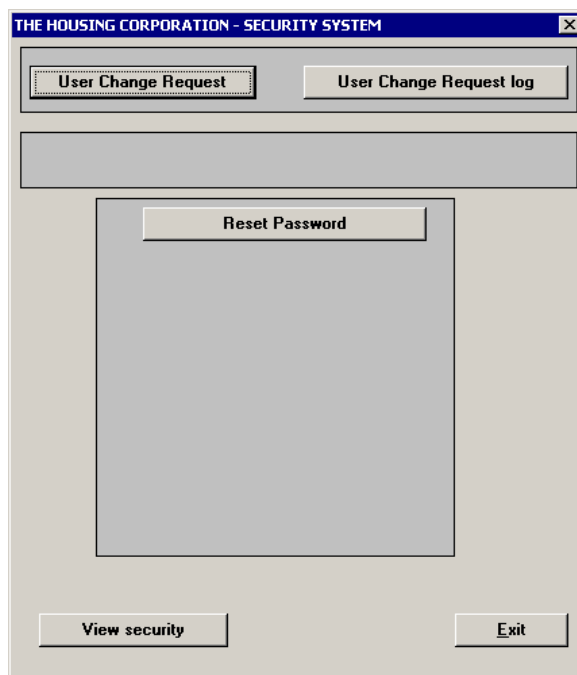
RSL Partnership Sign-Off
RSL Input Bids
RSL Submit Bids
RSL Maintain Forecast

- 1 To set up a user and add these authorities, your organisation's Security Administrator must log onto IMS security. Please see 2.2., 2.3 and 2.4 in the guidance above for further information on how to get to log-on to the point where you can see the IMS Security icon.

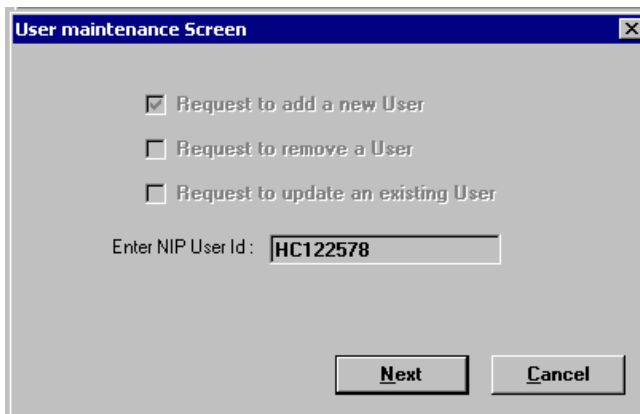


HousingCorp-Online Security

- 2 The following screen will be displayed:

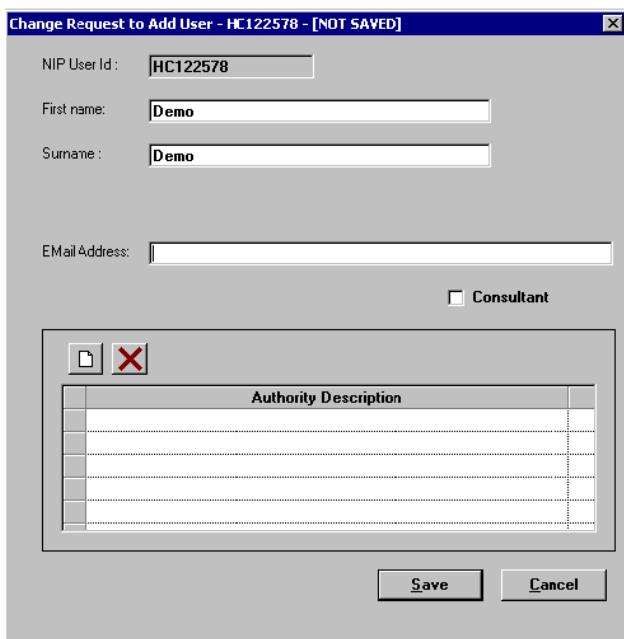


- 3 To add a new user click the User Change Request button in the screen above. The User Maintenance Screen below will appear. The NIP User Id (the IMS User ID) is automatically generated. Please take a note of this ID.




The 'User maintenance Screen' dialog box contains three radio button options: 'Request to add a new User' (which is selected), 'Request to remove a User', and 'Request to update an existing User'. Below these options is a text field labeled 'Enter NIP User Id:' containing the value 'HC122578'. At the bottom of the dialog are 'Next' and 'Cancel' buttons.

- 4 Click on the Next button to see the Add User screen. Security Administrators will see the screen below:



The 'Change Request to Add User - HC122578 - [NOT SAVED]' dialog box has several input fields: 'NIP User Id:' (pre-filled with 'HC122578'), 'First name:' (pre-filled with 'Demo'), 'Surname:' (pre-filled with 'Demo'), and 'EMail Address:'. There is a checkbox labeled 'Consultant' which is currently unchecked. Below these fields is a table titled 'Authority Description' with a grid of rows and columns. To the left of the table is a small icon of a document with a red 'X' over it. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

- 5 Enter the First name and Surname details of the user in the appropriate fields.
- 6 Enter the user's email address
- 7 Consultant Access tick box – Do not tick this box.
- 8 Click on the add new authority  icon. An arrow will appear in the first row of the Authority Description table. Select the appropriate authority in the screen below (see the list of authorities required at the start of this Annex).

Change Request to Add User - HC131924 - [NOT SAVED]

NIP User Id:

First name:

Surname:

E Mail Address:

Consultant

Authority Description	
→	URB Input Schemes
	URB Jump Facility
	URB Maintain FAP project
	URB Maintain Forecast
	URB Partnership Sign-Off
	URB Submit Allocation Change
	URB Submit Payment Claims
	URB Submit Schemes
	URB Terminate unsubmitted schemes
	Un-Registered Body Security Administrator

- Select the authority from the list and save. The screen will save that authority in the first row.

Change Request to Add User - HC131924 - [NOT SAVED]

NIP User Id:


First name:

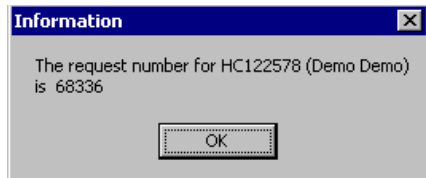
Surname:

E Mail Address:

Consultant

Authority Description	
→	URB Partnership Sign-Off

10. Click on the add new authority  icon again and add another row and select another of the authorities you need.
11. Continue this process until you have added each of the authorities you need on a separate row.
12. Then click the Save button. An Information box will be displayed:



13. All requests for creating new users will be authorised by the Housing Corporation. If you have a query regarding a new user contact the Housing Corporation helpdesk referencing the Request number (as shown above).

Updating an Existing Users

14. Click the User Change Request button, and then select Request to update an existing user from the User Maintenance Screen.
15. Enter the NIP User ID of the user you wish to amend and then click Next. The Update User screen will appear.
16. Add or delete the authorities as appropriate as detailed above. To delete an authority from the UserID highlight the Authority and select the delete icon
17. Keep a note of the request number generated when you save the screen it is needed as a reference to authorise your request.