



Homes &
Communities
Agency

Affordable Homes Programme 2015-18

Provider Reports in IMS

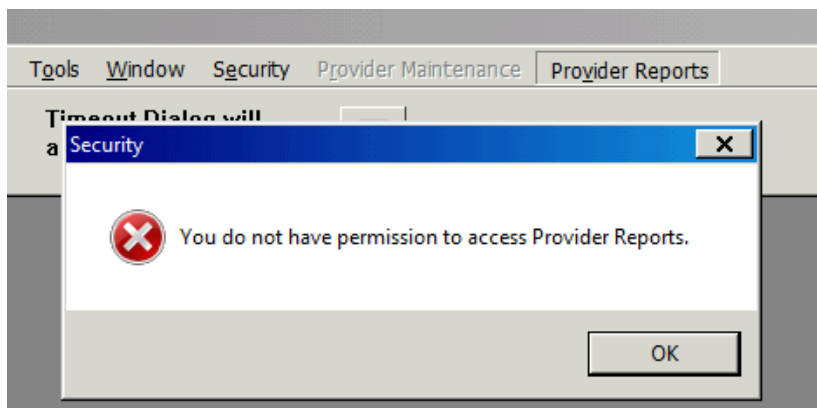
IMS System Guidance v 1.1

Version	Date Issued	Details
1.1	24/08/2015	Security Permissions added

A set of **Provider Reports** have been created in IMS to help improve external reporting. These reports will allow **real-time access** to data on the progress of profiles, allocations, schemes and forecasting in Excel spreadsheet format. These reports will be visible on screen and can be emailed to the address of the user.



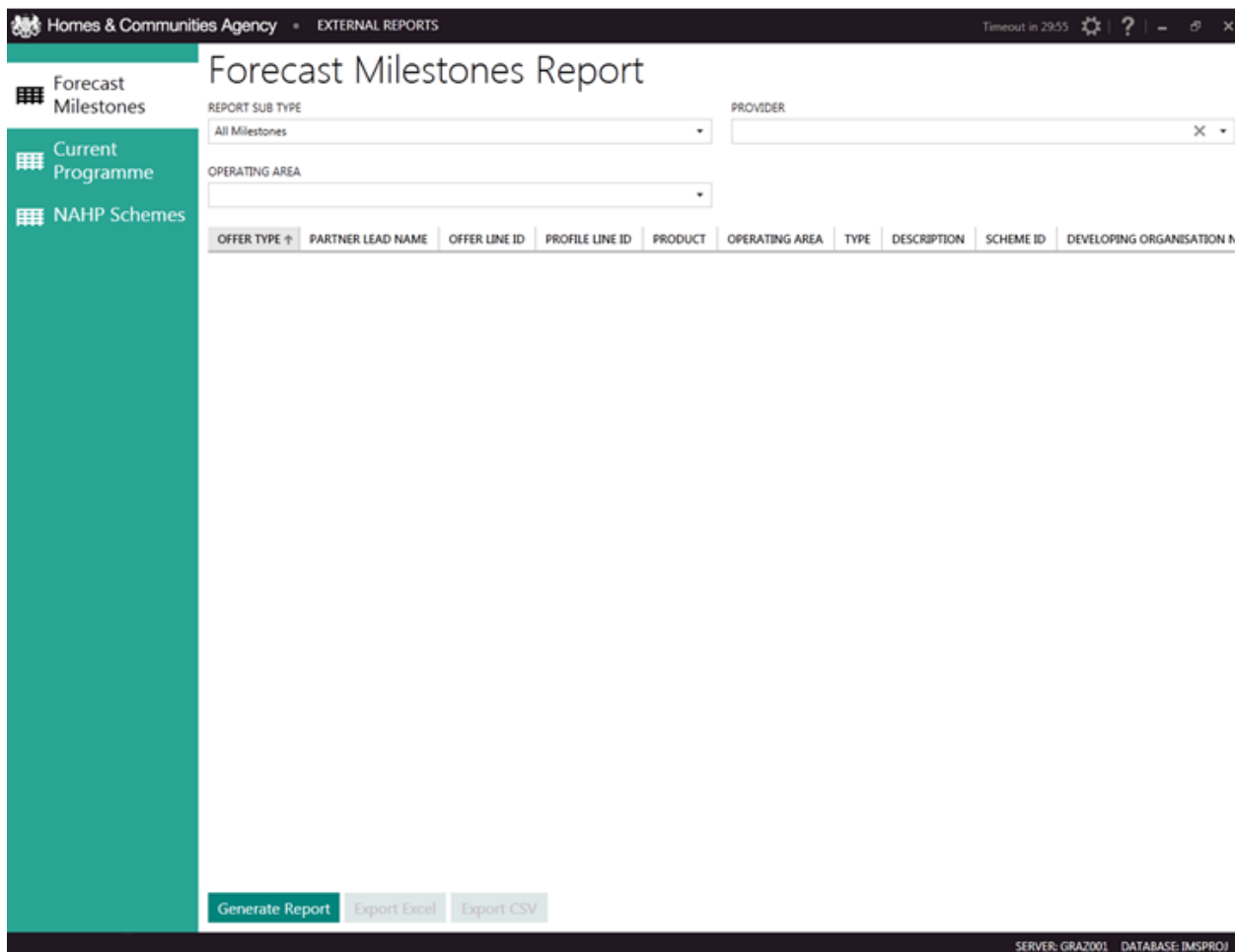
Provider Reports are accessed from the main menu of IMS as seen above on the far right-hand side of the available options.



Permissions

URB - Provider Reports
RP - Provider Reports

Access to Provider Reports is given via permissions assigned by an organisation's **security administrator**. If a user is receiving the above security error message when trying to open Provider Reports they should contact their security administrator to request access. The two different permissions are displayed above dependent on the type of provider (Unregistered Body or Registered Provider).



The screenshot shows the 'Forecast Milestones Report' interface. At the top, the breadcrumb navigation reads 'Homes & Communities Agency > EXTERNAL REPORTS'. The page title is 'Forecast Milestones Report'. On the left, a teal sidebar contains three menu items: 'Forecast Milestones' (selected), 'Current Programme', and 'NAHP Schemes'. The main content area features two dropdown menus: 'REPORT SUB TYPE' (set to 'All Milestones') and 'PROVIDER'. Below these is an 'OPERATING AREA' dropdown. A table header is visible with columns: OFFER TYPE, PARTNER LEAD NAME, OFFER LINE ID, PROFILE LINE ID, PRODUCT, OPERATING AREA, TYPE, DESCRIPTION, SCHEME ID, and DEVELOPING ORGANISATION N. At the bottom of the interface, there are three buttons: 'Generate Report', 'Export Excel', and 'Export CSV'. The footer indicates 'SERVER: GRA2001 DATABASE: IMSPROJ'.

Provider Reports initially opens to the **Forecast Milestones Report**. Alternative options in the left hand column are **Current Programme Report** and **NAHP Schemes Report**.

Forecast Milestones Report

REPORT SUB TYPE

All Milestones

All Milestones

Approaching Milestones

Lapsed Milestones

For the **Forecast Milestones Report** the options available for the sub type are shown above. This report is intended to identify start on site, interim and completion forecasts.

When selecting the **Approaching Milestones** option another dropdown field is displayed where Providers are able to select the appropriate criteria. The options are;

- Current month and next month
- Current month and next two months
- Current month and next three months

OPERATING AREA

East and South East

Midlands

North East, Yorkshire and The Humber

North West

South and South West

For all of the Provider Reports, an **HCA Operating Area** can be selected, alternatively, leaving this field blank will mean that the **National** position for a Provider is displayed.

Homes & Communities Agency • EXTERNAL REPORTS Timeout in 29:59

Forecast Milestones Report

Forecast Milestones
Current Programme
NAHP Schemes

REPORT SUB TYPE
Approaching Milestones

APPROACHING CRITERIA
Current month and next three months

OPERATING AREA
East and South East

PROVIDER
[REDACTED]

OFFER TYPE ↑	PARTNER LEAD NAME	OFFER LINE ID	PROFILE LINE ID	PRODUCT	OPERATING AREA	TYPE	DESCRIPTION	SCHEME ID	DEVELOPING ORGANISATION NAME	MILESTONE FORECAST DATE	MILESTONE	FUNDING (£)
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Exported reports will be sent to [REDACTED]. If this is incorrect, please contact your primary security administrator.

[Generate Report](#) [Export Excel](#) [Export CSV](#)

Once a report sub type, Operating Area and approaching criteria (for the Approaching Milestones report) are selected users can click on **Generate Report** at the bottom of the screenshot above and the report will initially be displayed on screen.

[Generate Report](#) [Export Excel](#) [Export CSV](#)  Busy, please wait...



As the report is being generated the whirring display above will be shown as the report is generated in the background.

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Forecast Milestones Report

Forecast Milestones

Current Programme

NAHP Schemes

REPORT SUB TYPE

Approaching Milestones

OPERATING AREA

East and South East

APPROACHING CRITERIA

Current month and next three months

PROVIDER

[REDACTED]

OFFER TYPE	PARTNER LEAD NAME	OFFER LINE ID	PROFILE LINE ID	PRODUCT	OPERATING AREA	TYPE	DESCRIPTION	SCHEME ID
Affordable Rent and Home Ownership 2015-18	[REDACTED]	8842	34711	AFFRENT	East and South East	Scheme Profile	[REDACTED]	[REDACTED]
Affordable Rent and Home Ownership 2015-18	[REDACTED]	8842	34712	AFFHO	East and South East	Scheme Profile	[REDACTED]	[REDACTED]
Affordable Rent and Home Ownership	[REDACTED]	818	3348	AFFRENT	East and South East	Scheme	[REDACTED]	[REDACTED]
Affordable Rent and Home Ownership	[REDACTED]	818	3358	AFFHO	East and South East	Scheme	[REDACTED]	[REDACTED]
Affordable Rent and Home Ownership	[REDACTED]	818	3888	AFFRENT	East and South East	Scheme	[REDACTED]	[REDACTED]
Affordable Rent and Home Ownership	[REDACTED]	844	8027	AFFRENT	East and South East	Scheme	[REDACTED]	[REDACTED]
Affordable Rent and Home Ownership	[REDACTED]	844	8028	AFFRENT	East and South East	Scheme	[REDACTED]	[REDACTED]
Affordable Rent and Home Ownership	[REDACTED]	844	8501	AFFHO	East and South East	Scheme	[REDACTED]	[REDACTED]
Affordable Rent and Home Ownership	[REDACTED]	798	18302	AFFRENT	East and South East	Scheme	[REDACTED]	[REDACTED]
Affordable Rent and Home Ownership	[REDACTED]	798	18305	AFFRENT	East and South East	Scheme	[REDACTED]	[REDACTED]
Affordable Rent and Home Ownership	[REDACTED]	798	18307	AFFRENT	East and South East	Scheme	[REDACTED]	[REDACTED]
Affordable Rent and Home Ownership	[REDACTED]	798	18309	AFFRENT	East and South East	Scheme	[REDACTED]	[REDACTED]
Affordable Rent and Home Ownership	[REDACTED]	818	9773	AFFRENT	East and South East	Scheme	[REDACTED]	[REDACTED]
Affordable Rent and Home Ownership	[REDACTED]	798	17281	AFFRENT	East and South East	Scheme	[REDACTED]	[REDACTED]
Affordable Rent and Home Ownership	[REDACTED]	798	18304	AFFRENT	East and South East	Scheme	[REDACTED]	[REDACTED]
Homelessness Change Programme	[REDACTED]	4706	21801	HCP	East and South East	Scheme	[REDACTED]	[REDACTED]
Homelessness Change Programme	[REDACTED]	5553	22310	HCP	East and South East	Scheme	[REDACTED]	[REDACTED]
Affordable Rent and Home Ownership	[REDACTED]	844	26672	AFFRENT	East and South East	Scheme	[REDACTED]	[REDACTED]
Affordable Rent and Home Ownership	[REDACTED]	844	26679	AFFHO	East and South East	Scheme	[REDACTED]	[REDACTED]
Affordable Rent and Home Ownership	[REDACTED]	844	40098	AFFRENT	East and South East	Scheme	[REDACTED]	[REDACTED]

Exported reports will be sent to [REDACTED]. If this is incorrect, please contact your primary security administrator.

[Generate Report](#)
[Export Excel](#)
[Export CSV](#)
Action completed successfully

A completed report is shown above. If a user wants to have a saved copy of the report there are two options available. **Export** as an **Excel** document, or, **Export** as a **CSV file**. Both options will mean that a saved copy will be sent to the email address stored in IMS for the user.



The screenshot shows a software interface with a dark header bar containing the text "Homes & Communities Agency" and "EXTERNAL REPORTS". Below this is a blue notification bar with an information icon and the text "Forecast Milestones Report for [redacted] - 2015-08-07.xlsx was successfully emailed to you at [redacted]". To the left of the main content area is a sidebar with a grid icon and the text "Forecast Milestones". The main content area features the title "Forecast Milestones Report" in a large, light-colored font.

Once a report has been sent via an email, a message similar to that above will be displayed. If the email address is incorrect or the email is not received please check with your organisation's security administrator to check the saved email address is correct.

Current Programme Report

Homes & Communities Agency • EXTERNAL REPORTS Timeout in 29:58

Current Programme Report

ANALYSIS TYPE: Unit Completions PROVIDER: [REDACTED]

OPERATING AREA: Midlands

OFFER TYPE	PARTNER LEAD NAME	OFFER LINE ID	PROFILE LINE ID	PRODUCT	OPERATING AREA	TYPE	DESCRIPTION	SCHEME ID	DEVELOPING ORGANISATION NAME	MILESTONE FORECAST
Affordable Rent and Home Ownership 2015-18	[REDACTED]	8137	35442	AFFRENT	Midlands	Scheme Profile	[REDACTED]	[REDACTED]	[REDACTED]	31/08/2017
Affordable Rent and Home Ownership 2015-18	[REDACTED]	8137	35443	AFFHO	Midlands	Scheme Profile	[REDACTED]	[REDACTED]	[REDACTED]	31/08/2017
Affordable Rent and Home Ownership 2015-18	[REDACTED]	8143	35445	AFFRENT	Midlands	Scheme Profile	[REDACTED]	[REDACTED]	[REDACTED]	31/03/2017
Affordable Rent and Home Ownership 2015-18	[REDACTED]	8143	35446	AFFHO	Midlands	Scheme Profile	[REDACTED]	[REDACTED]	[REDACTED]	31/03/2017
Affordable Rent and Home Ownership 2015-18	[REDACTED]	8018	35236	AFFRENT	Midlands	Scheme Profile	[REDACTED]	[REDACTED]	[REDACTED]	29/04/2016
Affordable Rent and Home Ownership 2015-18	[REDACTED]	7964	35306	AFFRENT	Midlands	Scheme Profile	[REDACTED]	[REDACTED]	[REDACTED]	30/12/2016
Affordable Rent and Home Ownership 2015-18	[REDACTED]	8075	35101	AFFRENT	Midlands	Scheme Profile	[REDACTED]	[REDACTED]	[REDACTED]	30/06/2017
Affordable Rent and Home Ownership 2015-18	[REDACTED]	8079	35237	AFFRENT	Midlands	Scheme Profile	[REDACTED]	[REDACTED]	[REDACTED]	28/07/2017
Affordable Rent and Home Ownership 2015-18	[REDACTED]	8006	35097	AFFRENT	Midlands	Scheme Profile	[REDACTED]	[REDACTED]	[REDACTED]	02/11/2016
Affordable Rent and Home Ownership 2015-18	[REDACTED]	9566	35471	AFFRENT	Midlands	Scheme Profile	[REDACTED]	[REDACTED]	[REDACTED]	29/12/2017
Affordable Rent and Home Ownership 2015-18	[REDACTED]	9566	35472	AFFHO	Midlands	Scheme Profile	[REDACTED]	[REDACTED]	[REDACTED]	29/12/2017

[Generate Report](#)
[Export Excel](#)
[Export CSV](#)
Action completed successfully

The **Current Programme Reports** work in a very similar way to those described for Forecast Milestones in the previous pages. The Analysis type options are Expenditure, Unit Starts and Unit Completions. Selecting one of these along with an HCA Operating Area will identify all actuals and remaining forecasts for the current financial year month by month. It will also show forecasts for the following two years as annual totals.

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NAHP Outstanding Schemes Report

- Forecast Milestones
- Current Programme
- NAHP Schemes

PARTNER LEAD NAME	OPERATING AREA	PRODUCT	SCHEME ID	ADDRESS	DEVELOPING ORGANISATION NAME	MILESTONE	MILESTONE FORECAST DATE	UNITS	FUNDING (£)
[REDACTED]	Midlands	HBVNB	[REDACTED]	[REDACTED]	[REDACTED]	Completion	31/08/2015	8	128,000

Exported reports will be sent to [REDACTED]. If this is incorrect, please contact your primary security administrator.

Generate Report
Export Excel
Export CSV
🔔 Action completed successfully

The final available report is the **National Affordable Housing Programme (NAHP) Outstanding Schemes Report**. This report does not have any parameters to amend; pressing the Generate Report button will identify any outstanding scheme forecasts for a Provider's NAHP schemes.