

# 4

## PROJECT PROCESSING

**HOMES FOR LONDONERS:  
AFFORDABLE HOMES  
PROGRAMME 2016-21**

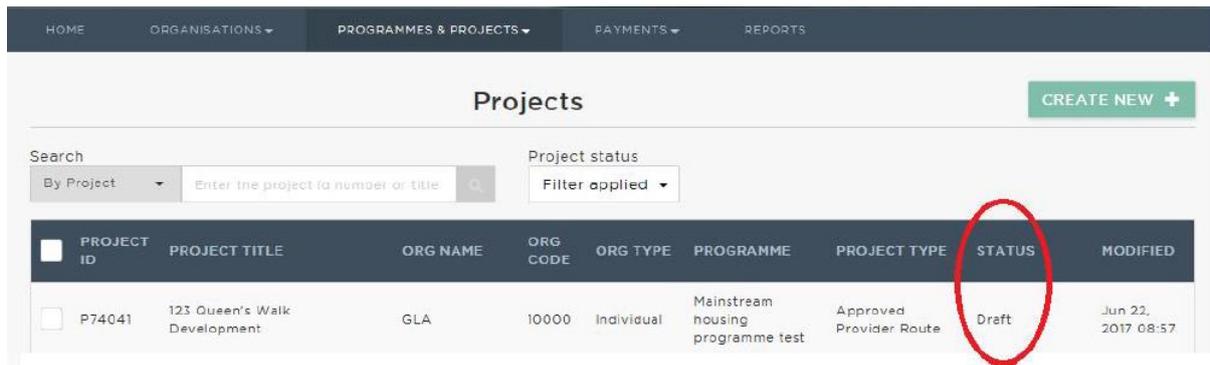
## 4. Project Processing

### 4.1 Projects Table and Project Status

To find your projects click on:



This will display the 'Projects Table' screen, which lists all your projects:

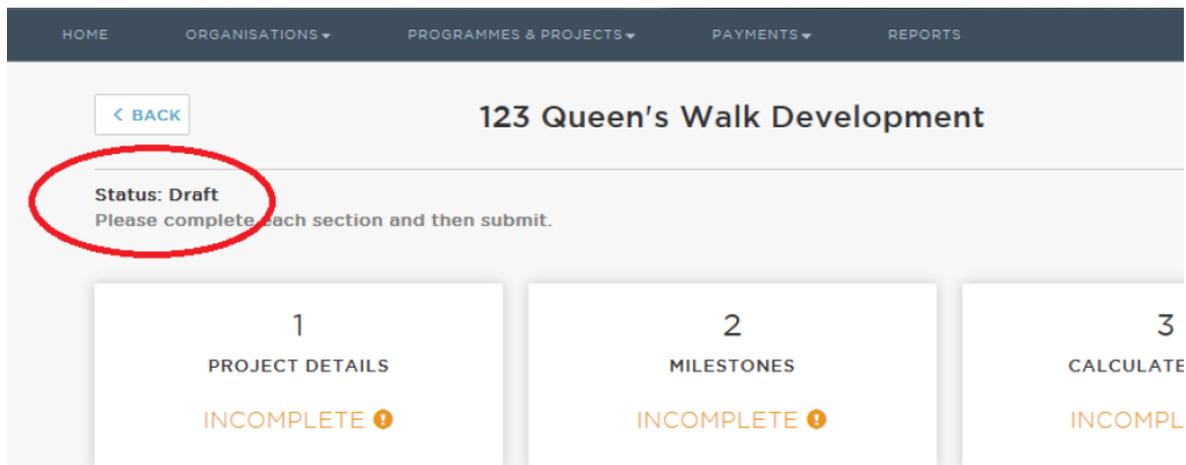


The screenshot shows the 'Projects' table interface. At the top, there is a navigation bar with 'HOME', 'ORGANISATIONS', 'PROGRAMMES & PROJECTS', 'PAYMENTS', and 'REPORTS'. Below this is a 'Projects' header with a 'CREATE NEW +' button. A search bar is present with 'By Project' and a search icon. A 'Project status' filter is set to 'Filter applied'. The table has the following columns: PROJECT ID, PROJECT TITLE, ORG NAME, ORG CODE, ORG TYPE, PROGRAMME, PROJECT TYPE, STATUS, and MODIFIED. A red circle highlights the 'STATUS' column, which shows 'Draft' for the project '123 Queen's Walk Development'.

PROJECT ID	PROJECT TITLE	ORG NAME	ORG CODE	ORG TYPE	PROGRAMME	PROJECT TYPE	STATUS	MODIFIED
P74041	123 Queen's Walk Development	GLA	10000	Individual	Mainstream housing programme test	Approved Provider Route	Draft	Jun 22, 2017 08:57

### Project Status

Each project record in GLA-OPS has a status, you can view this in the 'Projects Table' screen (shown above), or click on each project to view the 'Project Overview' screen, which also displays the project status:



The screenshot shows the 'Project Overview' screen for '123 Queen's Walk Development'. It features a 'BACK' button and a 'Status: Draft' indicator circled in red. Below this, there are three sections: '1 PROJECT DETAILS INCOMPLETE', '2 MILESTONES INCOMPLETE', and '3 CALCULATE INCOMPL'.

1	2	3
PROJECT DETAILS	MILESTONES	CALCULATE
INCOMPLETE	INCOMPLETE	INCOMPL

The project status will help you to identify the current status of each project and any action which may be required. This table describes each project status:

<b>Draft</b>	Project has been created but not yet submitted to the GLA. <b>NOTE</b> – providers can only create and submit projects for programmes marked as open for bidding by the GLA.
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<b>Submitted</b>	All required fields in the project record have been completed and the project has been submitted to the GLA for assessment. Providers cannot edit the project once submitted. If changes are required, the GLA must first return the project to the provider.
<b>Assess</b>	The GLA has marked the project as under assessment. No changes can be made to the project record while in this state unless the GLA returns the project to the provider.
<b>Returned</b>	The GLA has returned the project to the provider to make changes. The provider can update the project record once it is returned. Once resubmitted, the project will automatically go back to 'Assess' or 'Active: Approval Requested' if it is already active.
<b>Active</b>	The project has been approved by the GLA and it is now a live allocation.
<b>Active: Unapproved Changes</b>	The provider has edited an approved project but the changes have not yet been submitted to the GLA for approval.
<b>Active: Approval Requested</b>	The provider has edited an approved project and submitted the project to the GLA for approval.
<b>Active: Payment Authorisation Pending</b>	A GLA Area Manager or Senior Area Manager has requested payment authorisation for a changed project in which a payment milestone has been claimed. This means a payment record is awaiting authorisation by a Senior Area Manager. Once the payment record is authorised all changes to the project will also be approved and the status will return to 'Active'. If the pending payment is rejected by the Senior Area Manager, the project status will revert to 'Active: Approval Requested'. The Area Manager will then return the project to the provider to make the appropriate changes or to cancel the claims.
<b>Closed</b>	The project has been rejected by the Senior Area Manager and is now closed.

You can view the history of a project which includes the dates and times of changes to a project's status, by clicking to expand:



This is located towards the bottom of the 'Project Overview' screen.

### Projects Table Filter

To help you to manage your work, you may wish to use of the Projects Table filter. This function will allow you to filter projects by their status, for example, you may wish to quickly view only the projects which are 'Active: Approval Requested'.

HOME ORGANISATIONS PROGRAMMES & PROJECTS PAYMENTS

## Projects CREATE NEW +

Search Project status

By Project  All selected

PROJECT ID	PROJECT TITLE	ORG NAME	ORG CODE	PROJECT TYPE	STATUS	MODIFIED
P118685	2 The Queen's Walk	Potters Fields HA	10342	Approved Provider Route	Active	Jul 6, 2017 10:35
P118687	Water Place	Bridge Consortium	10342	Approved Provider Route	Assess	Jul 6, 2017 10:35
P118686	Halder Court	Potters Fields HA	10342	Developer-Led Route	Submitted	Jul 6, 2017 10:29

Showing 1 - 3 of 3 Previous **1** Next

Project status

- Active
- Active: Unapproved Changes
- Active: Approval Requested
- Active: Payment Authorisation
- Pending
- Assess
- Closed
- Draft
- Returned
- Submitted

## 4.2 Making Changes to a Project

Once your bid has been submitted, the GLA will change the status of your bid to 'Assess'. When their assessment is complete, the GLA will select one of these three options in GLA-OPS:

APPROVE PROJECT

REJECT PROJECT

RETURN TO ORGANISATION

Your project may be returned to you in order to make changes or to correct errors. The GLA may also add a conditional milestone to the milestone block. You will be required to enter a forecast date for this milestone and to re-submit your project.

If the GLA approves your project, the status will change to 'Active: Unapproved Changes'. The 'Project Overview' screen will now look like this:

HOME ORGANISATIONS PROGRAMMES & PROJECTS PAYMENTS

< BACK

## 2 The Queen's Walk

Status: Active Project ID: P25454  
 Unapproved Changes

1 PROJECT DETAILS APPROVED ✓	2 MILESTONES APPROVED ✓	3 CALCULATE GRANT APPROVED ✓
4 GRANT SOURCE APPROVED ✓	5 DESIGN STANDARDS APPROVED ✓	6 QUESTIONS APPROVED ✓
<div style="border: 1px solid orange; padding: 5px;"> <span style="background-color: #003366; color: white; padding: 2px;">NEW</span> <div style="text-align: center; margin-top: 5px;"> <p>7</p> <p>UNIT DETAILS</p> <p>UNAPPROVED ⚠</p> <p style="background-color: #990000; color: white; padding: 2px;">INCOMPLETE</p> </div> </div>		

Project History ▾

Before claiming a grant payment for the project, you will be required to check and update the information you have already entered in the question blocks, and to complete the Unit Details block.

From the 'Projects Table' screen, click on a project to make changes to it and then click on the relevant block(s). Click on EDIT  within each block to make the change and then click SAVE

You can make changes in any block. If you need to change the number of units or the tenure of the units, do this in the Calculate Grant block. If you have reduced the number of units in the Calculate Grant block and are now requesting too much funding in the Grant Source block, the Grant Source block will show as follows:

4

GRANT SOURCE

UNAPPROVED ⚠

INCOMPLETE

You will need to correct this block before you can submit the project. If you have increased the number of units in the Calculate Grant block, you may be eligible for additional funding, so you should check the Grant Source block and update it accordingly. The Unit Details block may also require updating (please see paragraph 5.4 of this guide for further details on this block):

Every time you review your project, you should check the Milestones block and update any milestone dates which have lapsed and have still not been achieved.

When you make changes to a block, the block will appear as **UNAPPROVED** until the change is submitted to and approved by the GLA.

Remember to click on **SUBMIT PROJECT** once all of your project changes are complete. Enter a comment to explain the changes you have made and to justify why they should be approved in the comments box.

### 4.3 Unit Details

In the Unit Details block, you will be required to complete the 'Enter Unit Details' screen, providing further information on the units, by tenure type, and provide additional information about the whole scheme. The Unit Details block will show as **INCOMPLETE** until you complete this screen.

It is easiest to look at this screen in two parts:

#### 1. 'Summary of Units by Tenure on the Project'

This table at the top of the screen will update automatically to reflect the number of units you profile out in the sections below. The number of 'Profiled Units' must match the number of 'Total Units' for each tenure type.

HOME
ORGANISATIONS ▾
PROGRAMMES & PROJECTS ▾
PAYMENTS ▾
REPORTS

< BACK

## Enter Unit Details

Project ID: **P25695**

### Summary of Units by Tenure on the Project

Total Units reflects the number of units already on the project; these must match the number of Profiled Units detailed in this block.

<p><b>LONDON AFFORDABLE RENT</b></p> <p>Profiled Units <b>0</b></p> <p>Total Units <b>10</b></p>	<p><b>LONDON LIVING RENT</b></p> <p>Profiled Units <b>0</b></p> <p>Total Units <b>10</b></p>	<p><b>LONDON SHARED OWNERSHIP</b></p> <p>Profiled Units <b>0</b></p> <p>Total Units <b>20</b></p>	<p><b>OTHER AFFORDABLE</b></p> <p>Profiled Units <b>0</b></p> <p>Total Units <b>0</b></p>
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### Enter Details of Rental Units

Add profiled unit information for all rent products

Tenure	Market Type	Bed(s)	Unit Type	Number of Units	Avg. Net Weekly Rent £	Avg. Weekly Service Charge £
London Af...	2016 - 2021 R...	Select	House	Enter units	Enter rent £	Enter £

ADD

TENURE	MARKET TYPE	BED (S)	UNIT TYPE	UNITS	NET WEEKLY RENT £	WEEKLY SC £	RENT TOTAL £	WEEKLY MARKET RENT £	RENT AS A % OF MARKET RENT
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### Enter Details of Sales Units

Add profiled unit information for all sales products

Tenure	Market Type	Bed(s)	Unit Type	Number of Units	Avg. Market Value £	Avg. First Tranche Sales %	Avg. Weekly Service Charge £
Lond...	Sales Pr...	1	Flat	10	300,000.00	Enter %	Enter £

ADD

There are separate tables to complete for 'Rental Units' and 'Sales Units' and there is a wizard to help you to input the details.

Select from the dropdown menus<sup>1</sup> in the wizard to input each unit type. You must create a different line for every different unit type, for example, a London Affordable Rent 1 bed flat must be entered onto a different line to a London Affordable Rent 2 bed flat.

**NOTE** – you do not need to enter a separate line for each individual unit: The example below shows 5 London Affordable Rent 1 bed flats grouped together, 3 London Affordable Rent 2 bed flats grouped together and 2 3 bed flats grouped together in the table. The units do not need to have the same rent and service charge to be grouped together; you should use average rent and service charge figures for each unit type.

Enter Details of Rental Units  
Add profiled unit information for all rent products

Tenure	Market Type	Bed(s)	Unit Type	Number of Units	Avg. Net Weekly Rent £	Avg. Weekly Service Charge £
London Af...	2016 - 2021 R...	3	Flat	2	161.22	5.00

**ADD**

TENURE	MARKET TYPE	BED (S)	UNIT TYPE	UNITS	NET WEEKLY RENT £	WEEKLY SC £	RENT TOTAL £	WEEKLY MARKET RENT £	RENT AS A % OF MARKET RENT
London Affordable Rent	2016 - 2021 Rent Product	1	Flat	5	144.26	5.00	149.26		
London Affordable Rent	2016 - 2021 Rent Product	2	Flat	3	152.73	5.00	157.73		
London Affordable Rent	2016 - 2021 Rent Product	3	Flat	2	161.22	5.00	166.22		

Click on **ADD** to add the unit type to the table. You will not be able to select **ADD** until you have answered all the questions for that unit type.

**NOTE** – The wizard retains the last set of information you input into it, so you will need to overwrite the wizard to change the number of bedrooms etc.

Complete the same process for the Sales Units, for example:

Enter Details of Sales Units  
Add profiled unit information for all sales products

Tenure	Market Type	Bed(s)	Unit Type	Number of Units	Avg. Market Value £	Avg. First Tranche Sales %	Avg. Weekly Service Charge £
Lond...	Sales Pr...	3	Flat	4	275,000.00	25	100.00

**ADD**

TENURE	MARKET TYPE	BED (S)	UNIT TYPE	UNITS	MARKET VALUE £	FIRST TRANCHE SALES %	% DISCOUNT OFF MARKET VALUE	WEEKLY SC £
London Shared Ownership	Sales Product	1	Flat	8	200,000.00	25		100.00
London Shared Ownership	Sales Product	2	Flat	8	260,000.00	25		100.00
London Shared Ownership	Sales Product	3	Flat	4	275,000.00	25		100.00

<sup>1</sup> See section 5 – Glossary and Dropdown Menu Options – guidance name for a list of the dropdown menu options.

## 2. 'Project Unit Details'

Finally, answer the remaining questions on the project as a whole.

Units by Number of People – enter the number of units on the project which house 1 person, 2 people, etc. The number of units must match the total number of units in the project.

TENURE	MARKET TYPE	BED(S)	UNIT TYPE	UNITS	MARKET VALUE £	FIRST TRANCHE SALES %	% DISCOUNT OFF MARKET VALUE	WEEKLY SC £
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Project Unit Details

Build Type  
The total build type split must match the total of 40 units in the project

BUILD TYPE	NEW BUILD	REFURBISHED	TOTAL
UNITS	40		40

Units by Number of People  
Detail how many people each unit is designed to accommodate, total must match the 40 units in the project.

PEOPLE	1	2	3	4	5	6	7	8+	TOTAL
UNITS	10	10	10	10					40

Number of Wheelchair Units  
In total (including any specialised units) how many units are either wheelchair accessible or wheelchair adaptable?

Gross Internal Area  
Input the total gross internal area in sqm for all units in the project, excluding communal areas e.g. lifts.

If no milestones on the project have been achieved at this time and therefore you do not wish to claim any milestones, click on [REQUEST APPROVAL](#)

The GLA will then either approve your changes or return the project to you, to make further changes.