User Guide (V5)

Contents

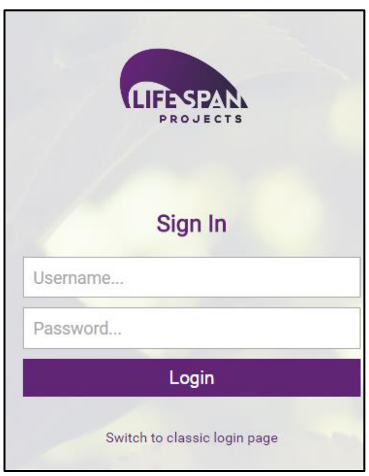
1. Getting Started

Lifespan Projects is a comprehensive project management IT toolkit for managing contract processes from end to end. Lifespan Projects provides an opportunity for everyone involved in a project to collaborate efficiently by sharing and contributing information across a common process driven platform. Lifespan Projects is designed to manage and control tasks, costs, time, documents and individual roles and responsibilities throughout the life of a project. Lifespan Projects is based on a customer led process plan made up of a number of tasks and sub-tasks which are delivered according to an agreed timescale which is recorded in Lifespan Projects in a time chart (Gantt Chart). Users responsible for delivering the tasks and sub-tasks are provided with appropriate access and have their own user areas within the software to help them deliver their tasks. For example; managing specific processes, collecting and storing information, communicating with other team members and sharing information and performance measures in time, quality, cost and safety etc.

1.1 Logging in

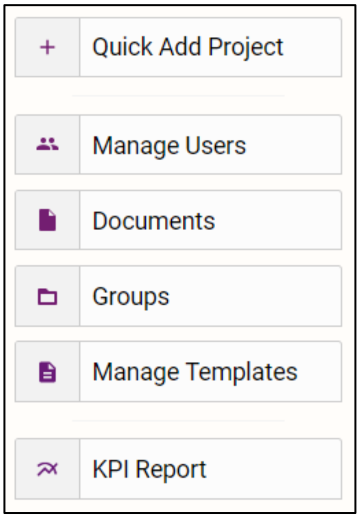
1. To log into Lifespan Projects, browse to https://pt-lifespan.com/LifespanProjects

2. Enter your username and password and click Login



1.2 Overview

1.2.1 Settings



Quick Add Project allows you to quickly add a new project.

Manage Users takes you to the user management section.

Documents allows you to add template documents.

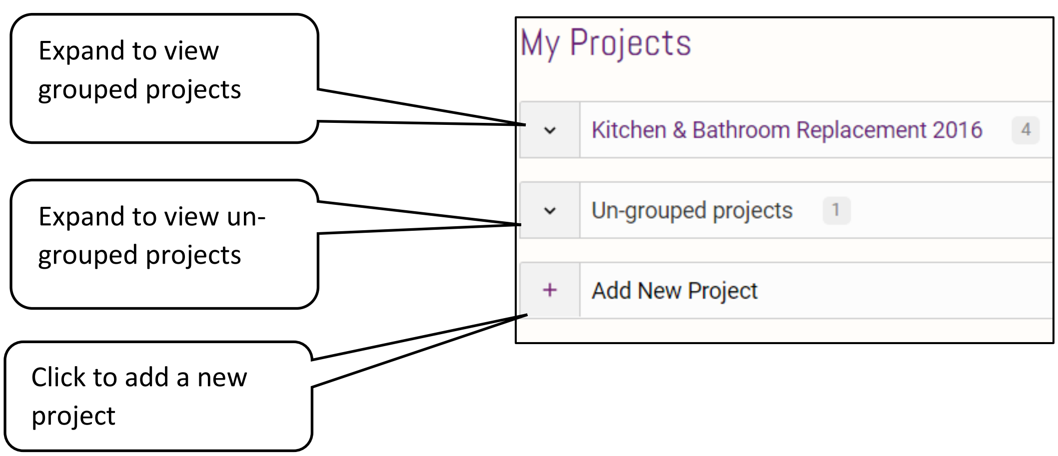
Groups allows you to group projects together.

Manage Templates allows you to create and manage project templates.

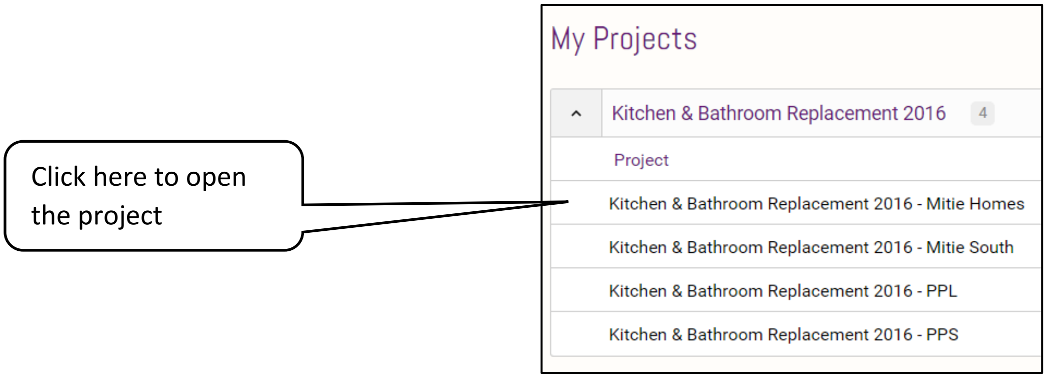
KPI Report allows you to generate a comprehensive KPI report based on data from a specific project or group for a selected timeframe.

1.2.2 My Projects

1. Your projects are displayed in groups.

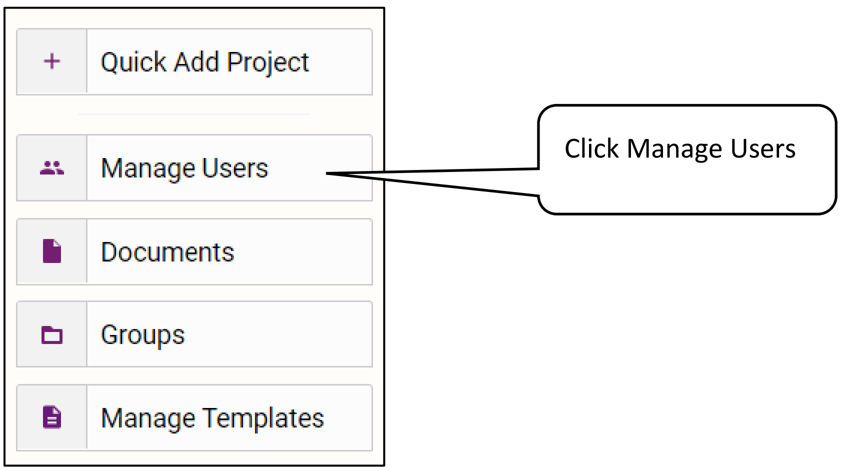


2. Once you have expanded a list of projects you can open a project by clicking on it



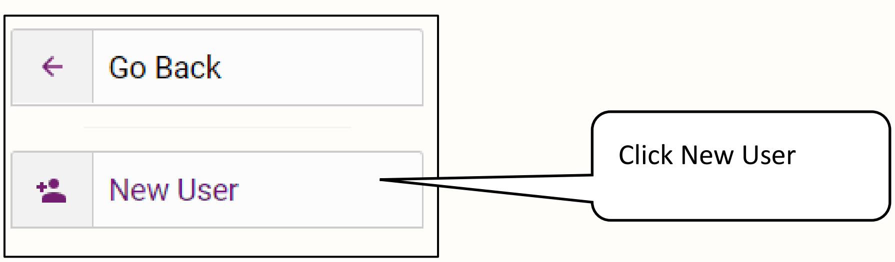
2. Managing Users

To manage users, click on **Manage Users**



2.1 Adding New Users

1. Click on the **New User** button



2. Fill in the details for the new user

3. Pick a username for the user. By default, this will be *Forename.Surname*

4. Select a password for the new user. The user will be required to change their password upon their first log-in.

    a. *Default Password* - The default password of 'Project' will be assigned to the new user. This is the simplest, but least secure option.

    b. *Random Password* - A random password, combining numeric and alpha-numeric (including upper and lowercase) letters.

5. If you would like an email to be sent to the new user immediately, tick the 'Send Welcome Emails' box. If you wish to provide the user with their access details at a later date, leave this clear.

6. Choose what permissions you would like the new user to have;

    a. *User can create projects* - the new user will be a project manager and can create new projects as well as manage users

    b. *User can manage tasks* - the new user will be able to access a project and will appear in the task manager option lists for any of your project tasks

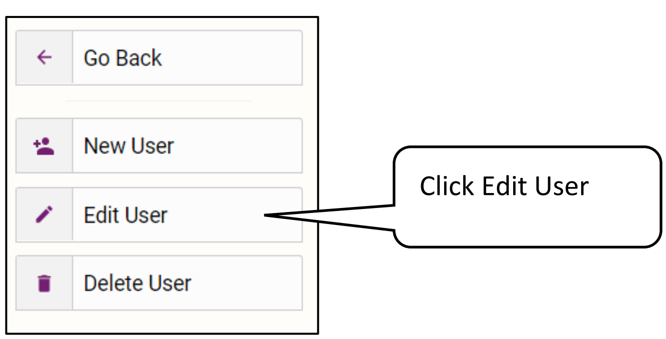
7. Click on '**Create User**' button

By default, new users won't be able to access any existing projects. You will need to assign this new user to each of the projects you want them to access, as well as configuring which project 'Objects' you would like them to see.

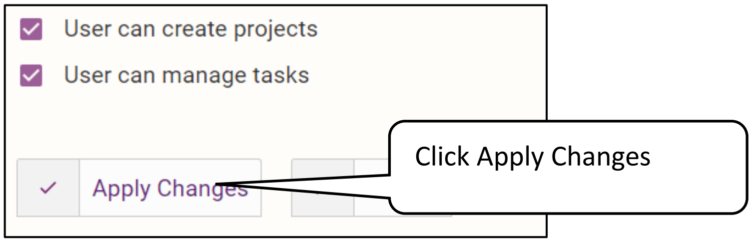
NOTE Only project managers can create new user accounts.

2.2 Editing Users

1. Select the user you wish to edit.
2. Click the **Edit User** Button



3. Make any required changes and click on **Apply Changes**.



2.3 Setting User Access rights to a project

1. Select the user you wish to set access rights for
2. Hover your mouse over the menu button then select Manage

3. For each project in the list, choose what level of access the user should have
4. Click Apply Changes

2.4 Assigning User Access to Objects

Every project can have different objects which are assigned to the client's company.

If you need to enable/disable objects to a user so that the user can see or change the object's data, perform the steps below.

1. From your '**My Projects**' click on 'Manage Users' button.

2. Select a user from the list for which you want to manage the objects.

3. From the **Object Access** widget select 'Manage' from the widget menu.

4. Select a project from the list for which you want to manage the objects for the user you selected in step 2.

5. For each object, choose what level of access user should have for the selected project.

6. Click on button 'Apply Changes' to submit changes.

2.5 Permission Groups

Permission groups allow you to easily manage the permissions for a selected number of users. Instead of having to choose the level of access for projects and objects for each user, you just do it once for the group so when the user is added they have the same level of visibility as the other members.

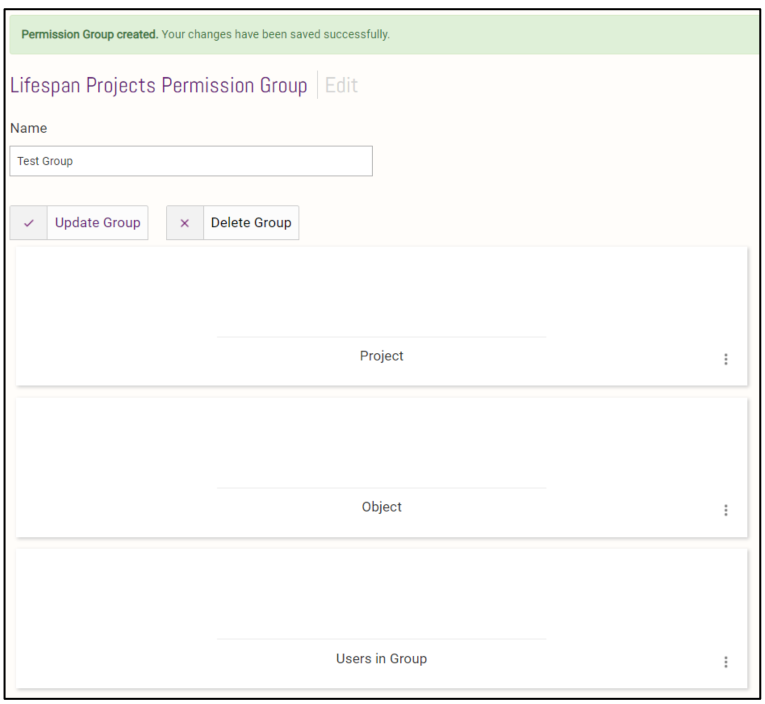
To set up a new group;

1. From your '**My Projects**' click on 'Manage Users' button.

2. Go to ‘Permission Groups’.

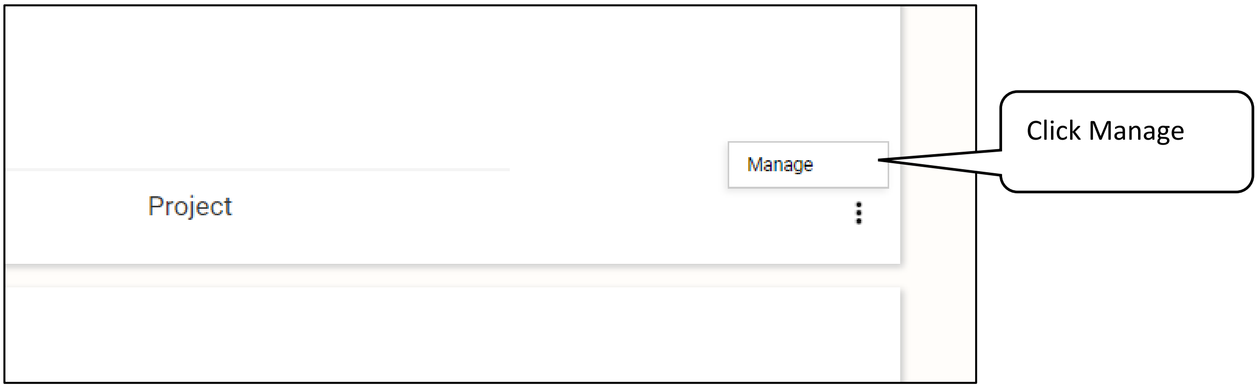
3. Select ‘New Group’

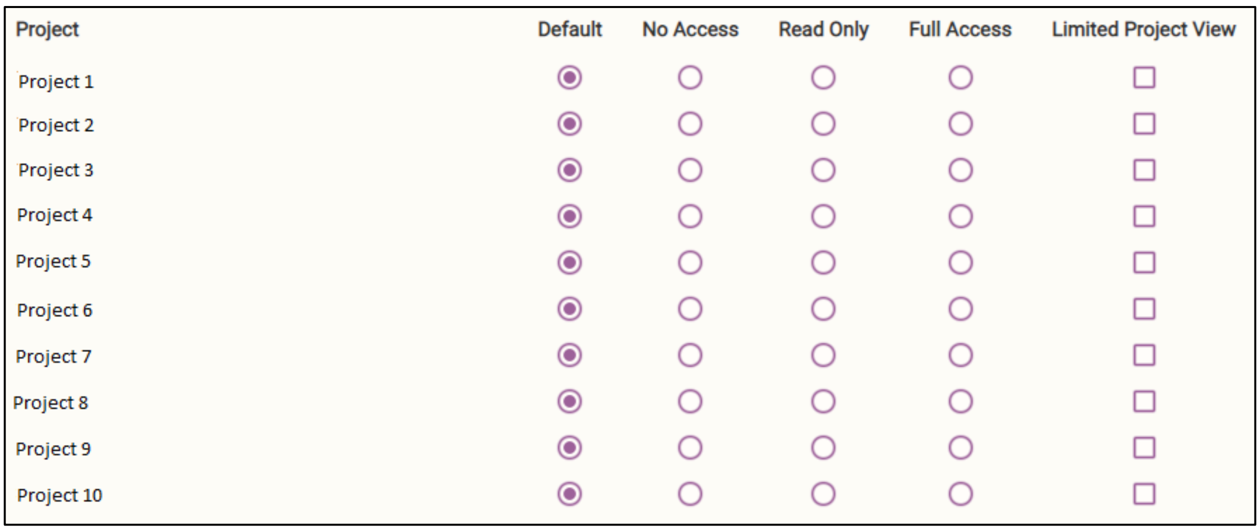
4. Type in the name of the group you wish to add and click ‘Create Group’.



You are taken to the ‘Edit’ screen and from here you can amend the name of the group, along with viewing or editing the linked projects, objects and users.

Now you have created your group, you can add the projects you want to include and set the objects required for each of them. Go to the project tile and select 'Manage'.





Project	Default	No Access	Read Only	Full Access	Limited Project View
Project 1	◉	○	○	○	☐
Project 2	◉	○	○	○	☐
Project 3	◉	○	○	○	☐
Project 4	◉	○	○	○	☐
Project 5	◉	○	○	○	☐
Project 6	◉	○	○	○	☐
Project 7	◉	○	○	○	☐
Project 8	◉	○	○	○	☐
Project 9	◉	○	○	○	☐
Project 10	◉	○	○	○	☐

The full list of projects in the database will show and from here you can choose the level of access you want to give to the account for each of them. Just click in the circle/square icon under the appropriate column for each project. Once this has been done, press '**Apply Changes**' at the bottom of the screen.

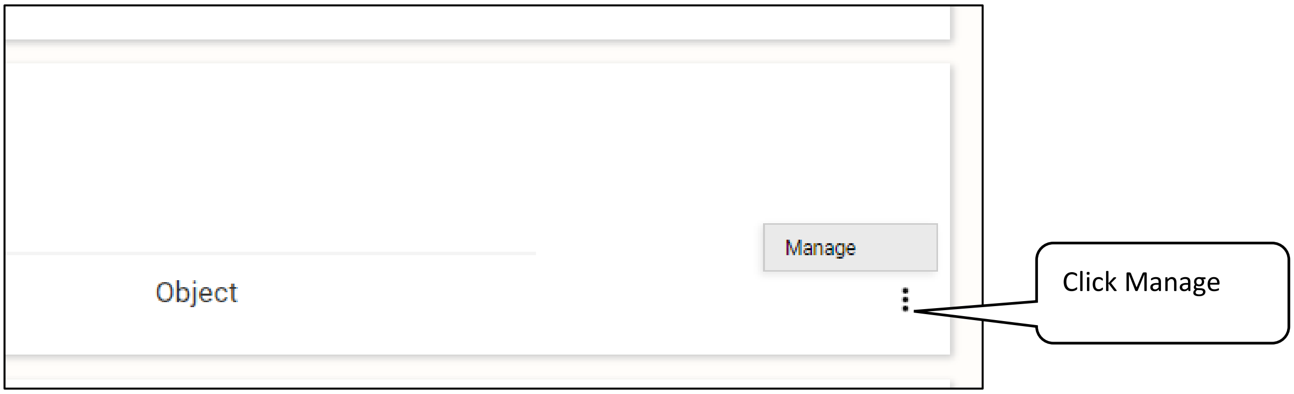
No Access – the project will not appear in any of the user accounts linked to this group.

Read Only – the user will be able to view the project but will only be able to make changes to the tasks for which they are responsible.

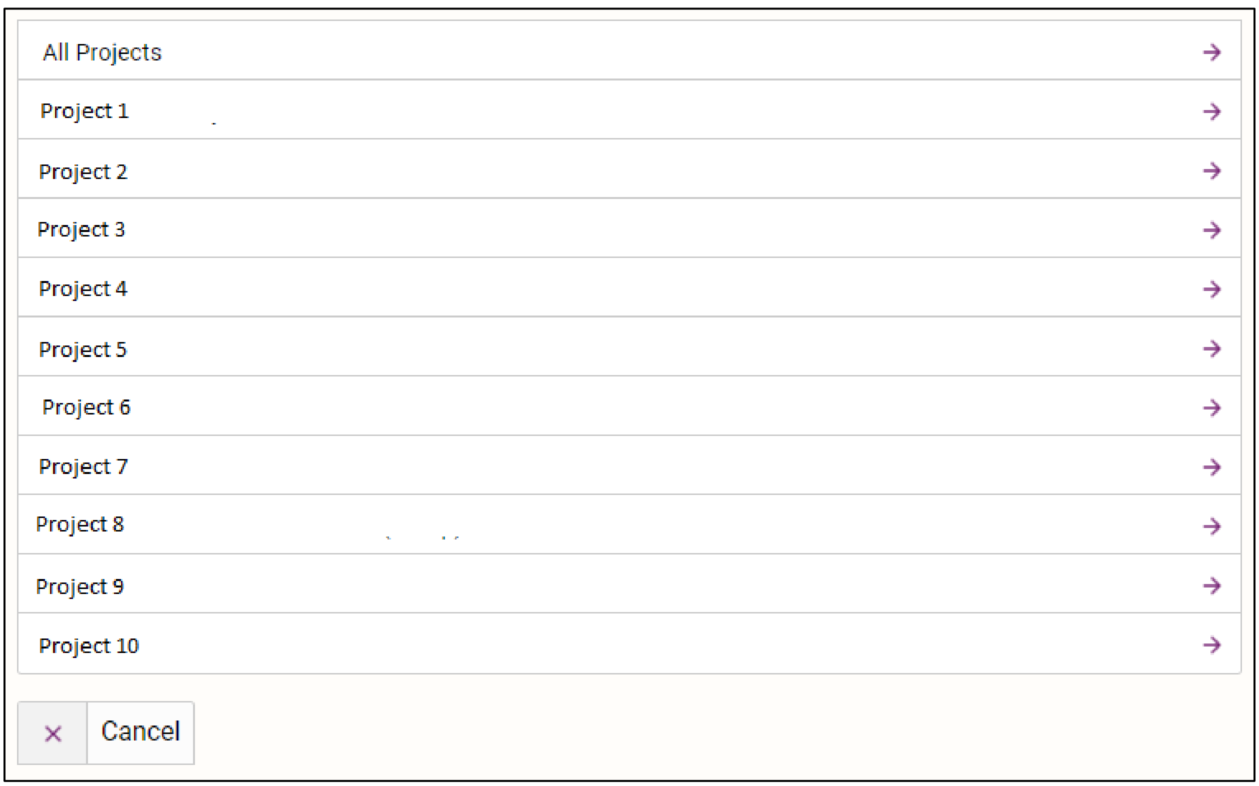
Full Access – the user will be able to view the project and all tasks associated with it, however, they will still only be able to make changes to the tasks for which they are responsible.

Limited Project View – the user will be able to view the project; however, they will only be able to see the tasks they have been assigned to.

To set the objects, go to the object tile and select 'Manage'.



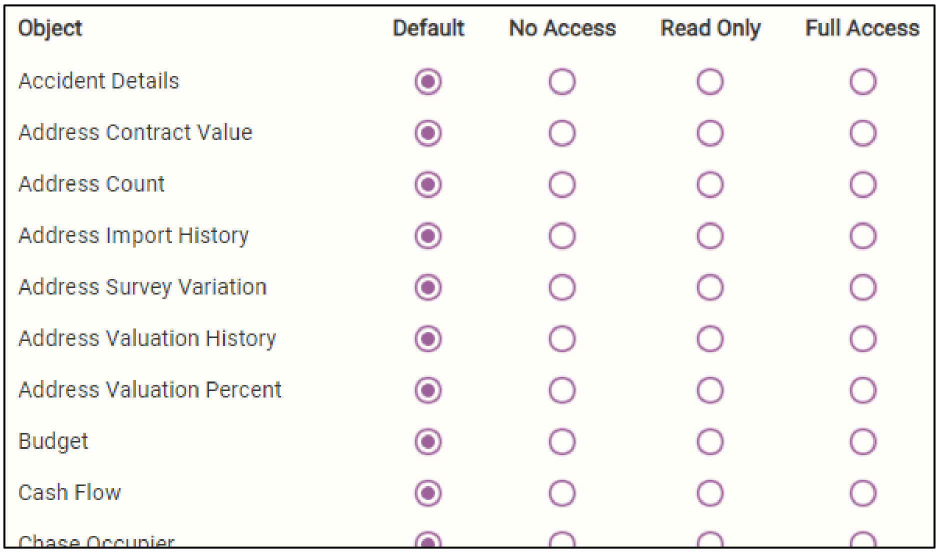
The list of projects for the group will be shown as below, giving you the option to add objects to projects individually by choosing a specific one, or to apply the same objects to each one by selecting 'All



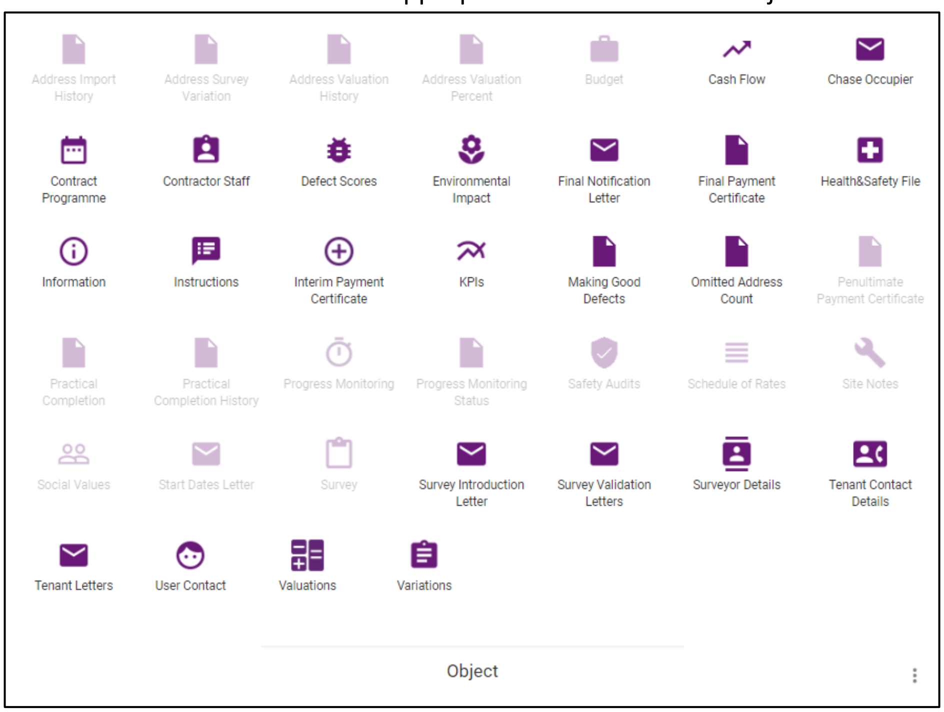
Projects'.

Once you have selected either one or all projects to set the objects for, another list will show allowing you to select the level of access required for the users within the group.

You are provided with options of either 'No Access', 'Read Only' or 'Full Access' for each object.

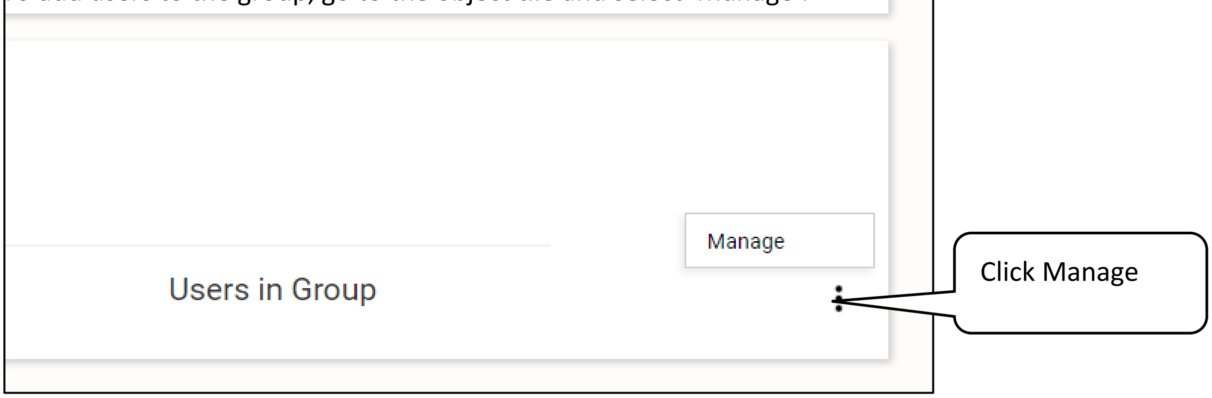


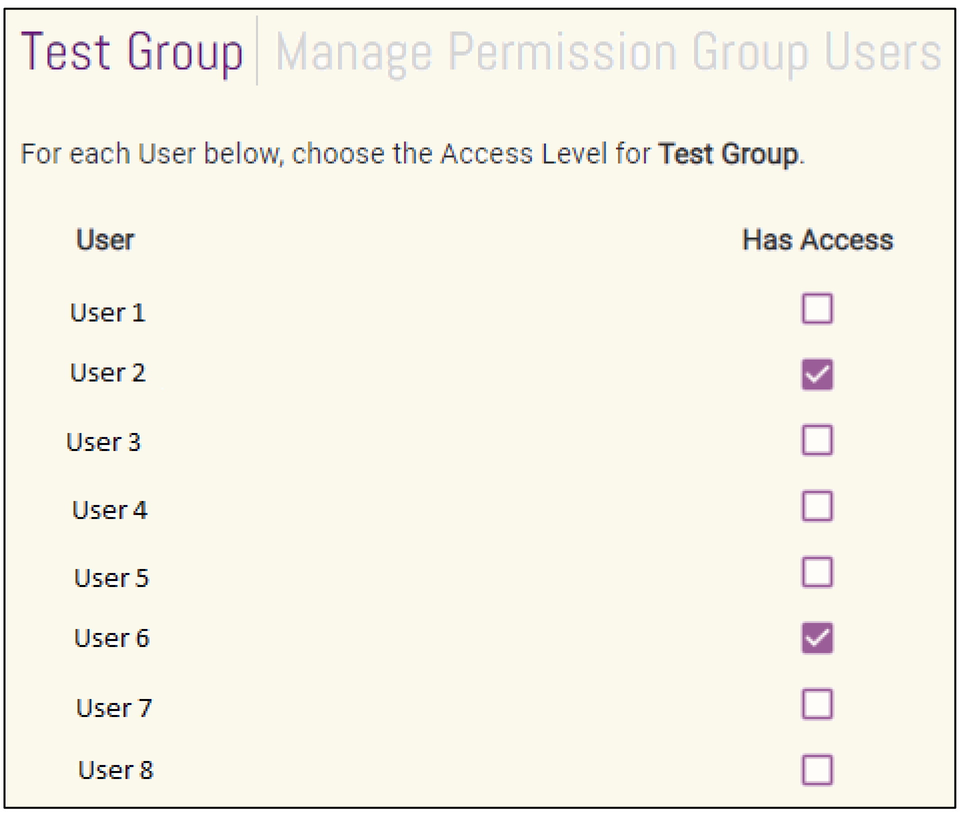
Click in the circle icon under the appropriate column for each object. Once this has been done, press ‘**Apply Changes**’ at the bottom of the screen.



Back in the group page, the icons will now appear in the objects tile. Here you will see all of the objects you have selected as either ‘read only’ (faded icons) or ‘full access’ (opaque icons).

To add users to the group, go to the object tile and select ‘Manage’.



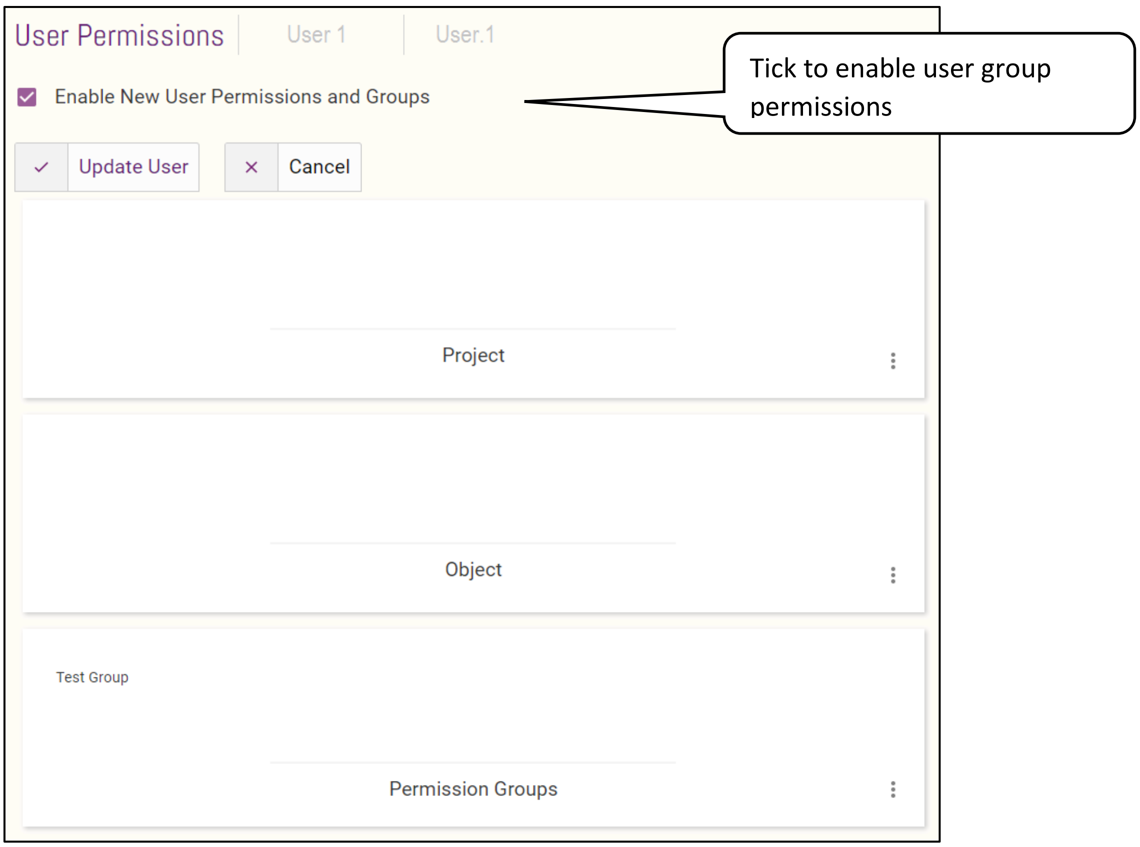


This will bring up a list of all users in the database. From here just tick under the ‘Has Access’ column for each user you want to add to the group. Once done, click ‘**Apply Changes**’ at the bottom of the screen to confirm.

2.6 User Permissions

Within ‘User Permissions’ you can go into each user account separately to make any necessary changes. Once you have set up a new user (see 2.1 adding a new user) the details will be available in user permissions.

1. From your '**My Projects**' click on 'Manage Users' button.
2. Click on ‘User Permissions’ and select the user required.
3. Tick the box next to ‘Enable New User Permissions and Groups’. This will ensure the user has the permissions linked to the group they are included in.

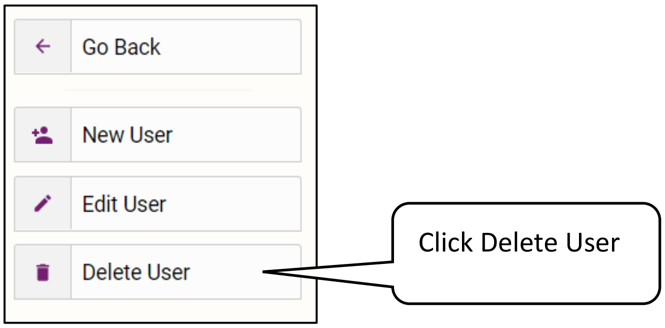


This screen shows details for the user, including all projects, objects and the permission groups they are linked to. As shown above, User 1 is in the group ‘Test Group’, which means they will have all of the permissions connected to this group – even though the tiles are empty for ‘Project’ and ‘Object’.

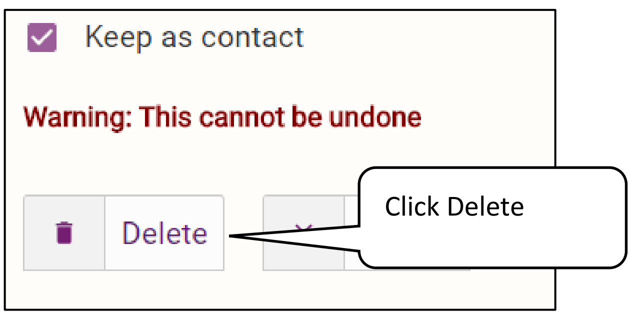
NOTE Any projects/objects included in user permissions will override the permissions set for the group, so if the user has been given access to additional objects here, these will also be visible in their group projects.

2.7 Deleting Users

1. Within 'Manage Users', select the user you wish to delete.
2. Click **Delete User**



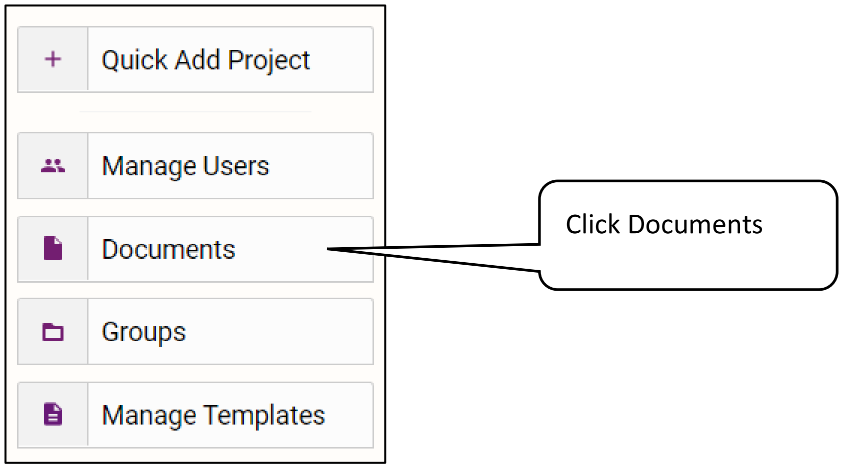
3. If you wish to keep the user as a contact tick the **Keep as contact** box, otherwise leave it unticked.
4. Click **Delete**. **NOTE** this cannot be undone.



3. Documents

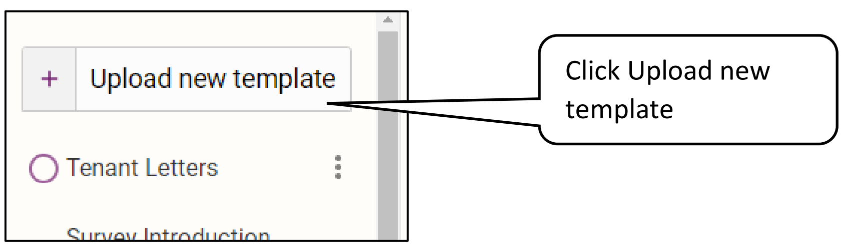
The document section shows all existing templates available for use within the software. From here you can edit or delete an existing document or upload a new document template.

1. Click into 'Documents'.

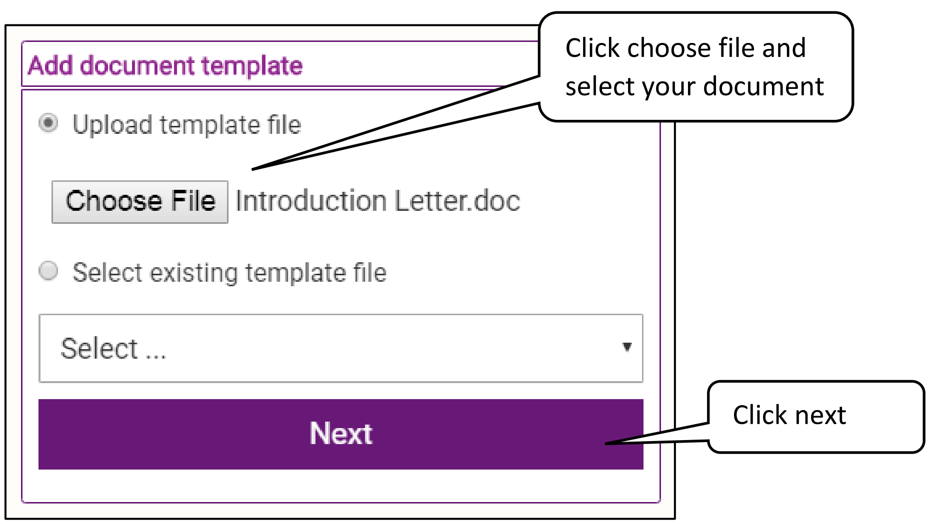


3.1 Adding a new template

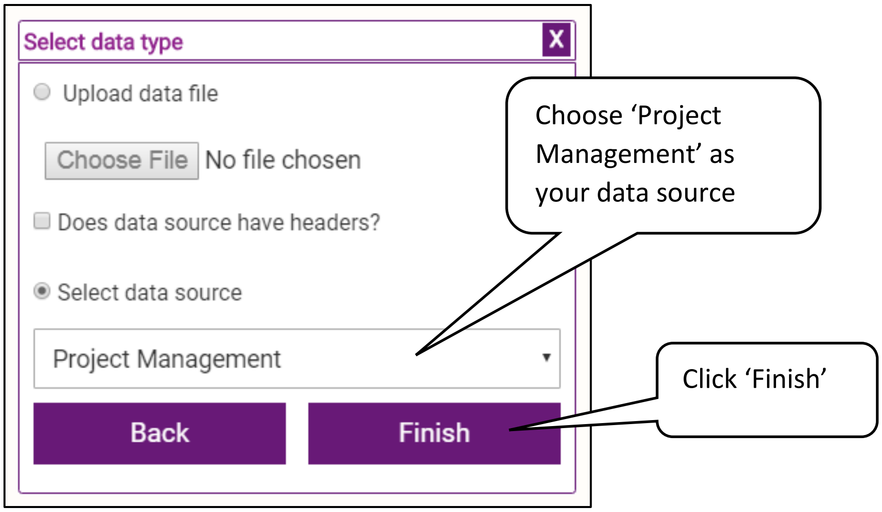
1. Select ‘Upload new template’.



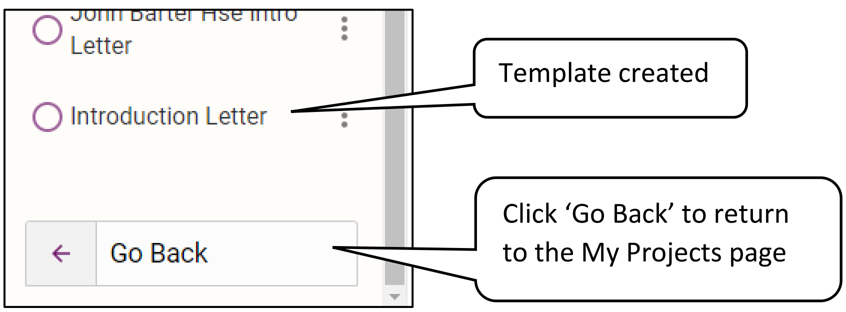
2. The following dialog box will appear, click ‘choose file’ and browse your computer files to select the document you want to use as your template.



3. You will now have to select your data type, click next to ‘select data source’ and choose ‘Project Management’ from the drop-down list to use information from projects to populate your data fields.

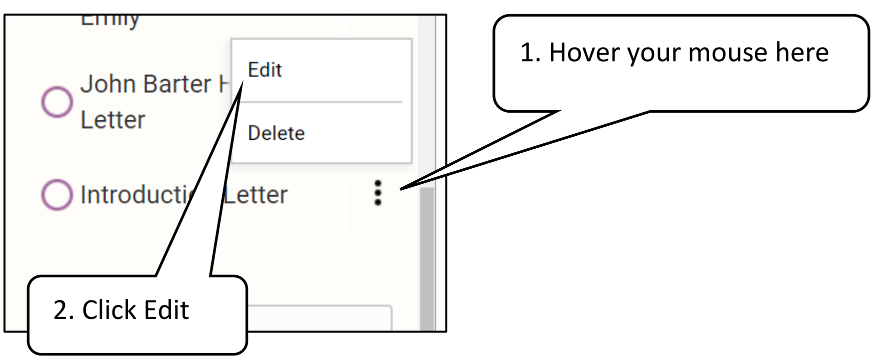


4. Your template will now appear at the bottom of the list on the left and will be available to use within your projects.

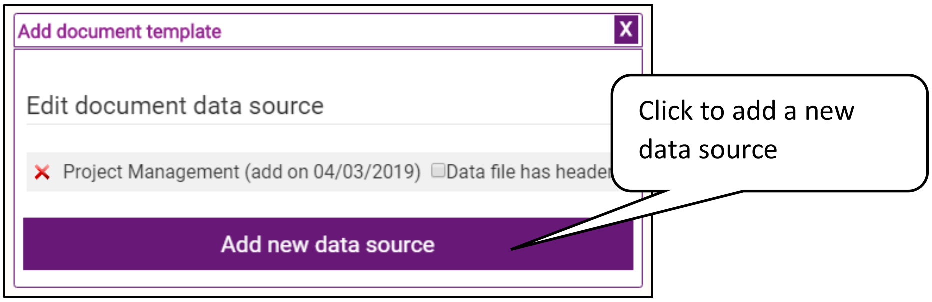


3.2 Editing an existing template

1. Go to the template you want to amend, hover over the three dots to the right of the listing and click 'Edit'.



2. The box below will appear enabling you to change the data source for the template. Click 'Add new data source' to change where software populates the data fields from.

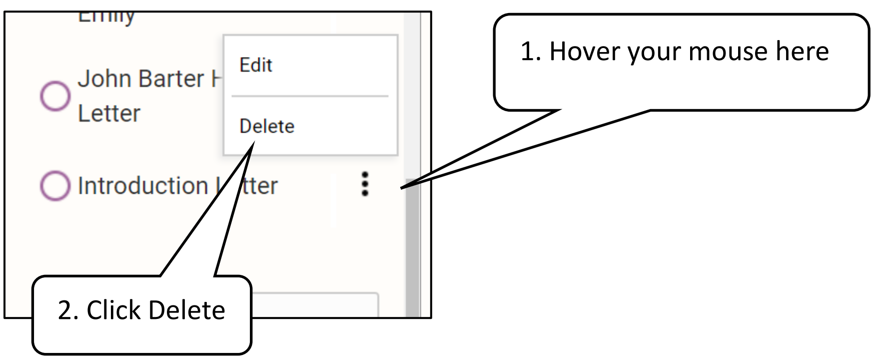


3. Enter the new details and click finish.

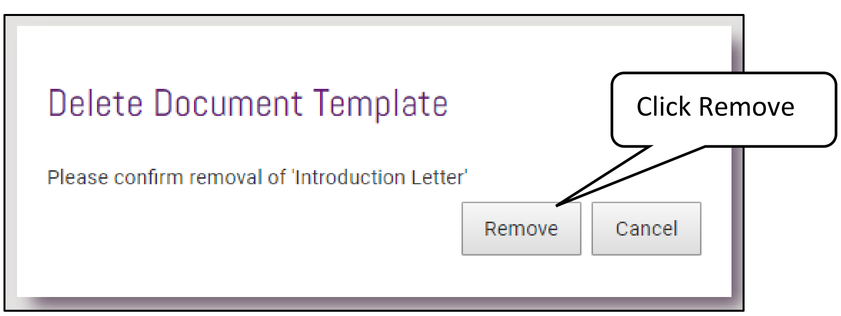
NOTE This is to amend the data source, not the template. To change the template, delete the existing one and re-upload using the corrected document.

3.3 Deleting an existing template

1. Go to the template you want to remove, hover over the three dots to the right of the listing and click 'Delete'.



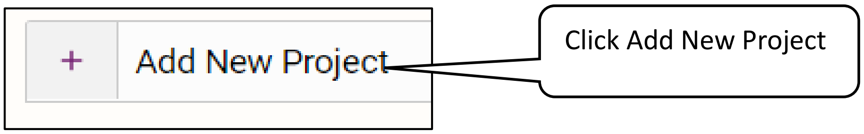
2. When prompted, click 'Remove' to delete the template. The template will now have been removed from the document list and will not appear as an option to choose in any of your projects.



4. Project Administration

4.1 Creating a new project (Project Information)

1. Click on Add New Project

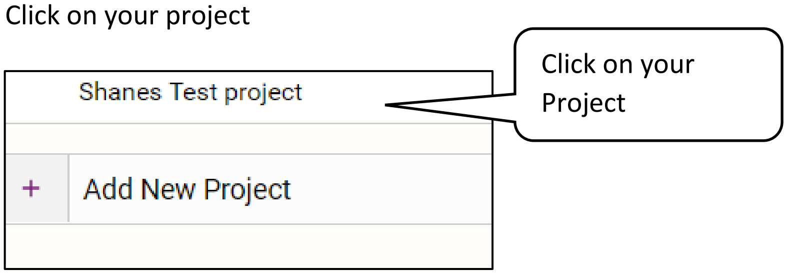


2. Fill in all the information that is requested

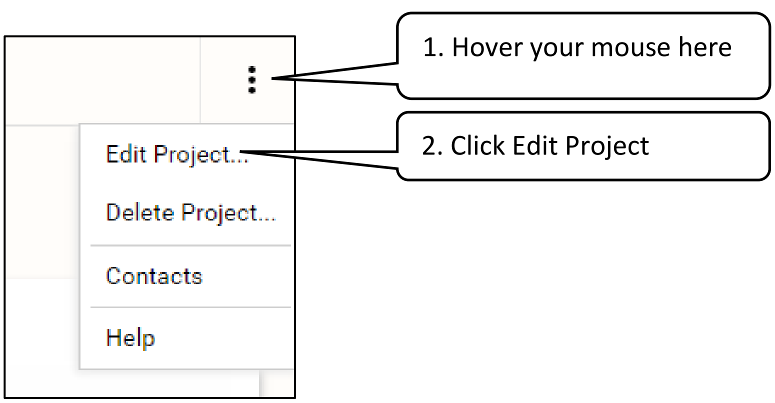
3. Click on the '**Save**' button

4.2 Editing a project (Project Information)

1. Click on your project



2. Your project will now open. Hover your mouse over the menu button at the top right of the screen then select Edit Project



3. Fill in all the information that is requested
4. Click on the 'Save' button

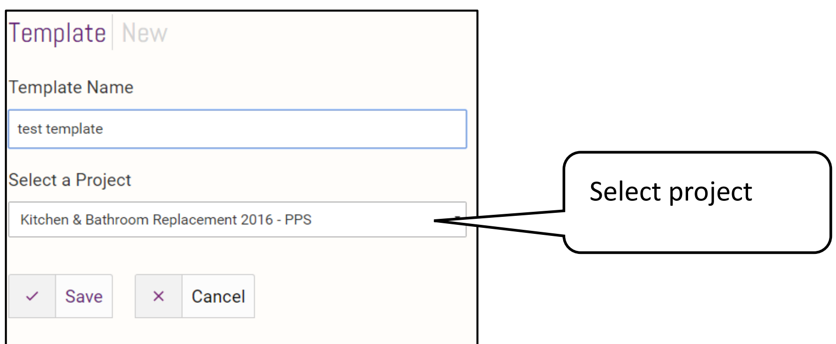
NOTE Within the edit screen if you change the status of the project to 'Complete', this will automatically delete all of the tenant information for the project. For data protection these details are removed and cannot be restored.

4.3 Managing Project Templates

This section allows you to create project templates from existing projects.

4.3.1 Creating Project Templates

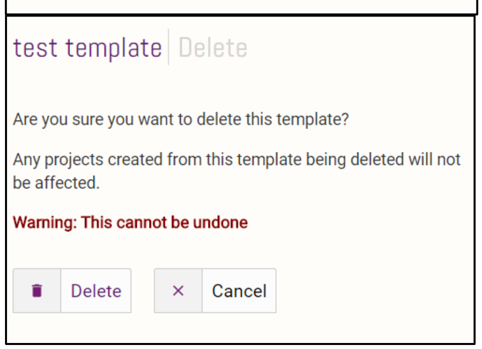
1. In the "My Projects" page click on Manage Templates
2. Click on New Template
3. Enter the template name
4. Select a project from the drop down



5. Click on Save

4.3.2 Editing Project Templates

1. Click on the Project Template
2. Click Edit Template
3. Make the required changes
4. Click Save

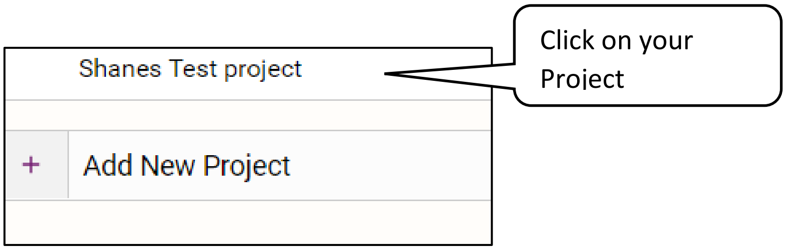


4.3.3 Deleting Project Templates

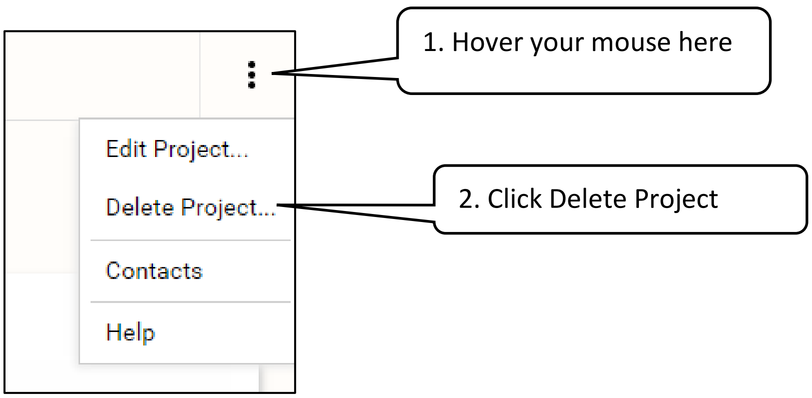
1. Click on the Project template you wish to delete
2. Click on Delete Template
3. Click Delete

4.4 Deleting a project

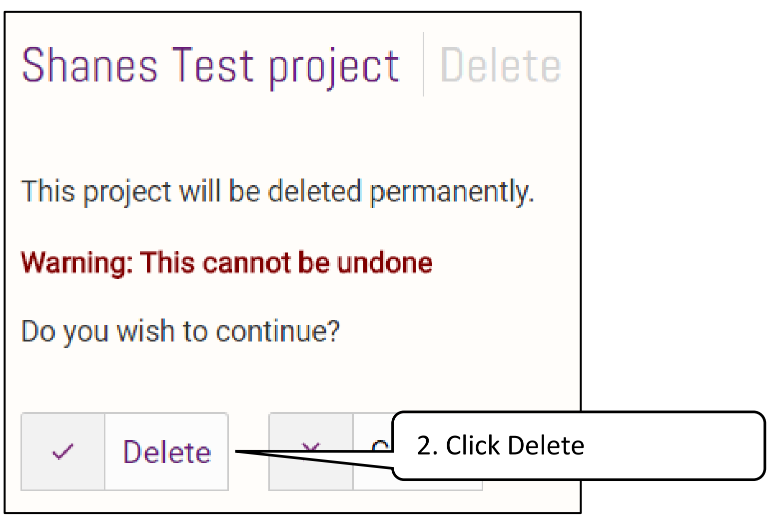
1. Click on your project



2. Your project will now open. Hover your mouse over the menu button at the top right of the screen then select Delete Project



3. Click Delete



4.5 How to add addresses to a project

Adding properties into Lifespan Projects is easy to do, however it must be done from Lifespan Housing. Using your Lifespan Housing account, follow the instructions below to add properties into any of your projects.

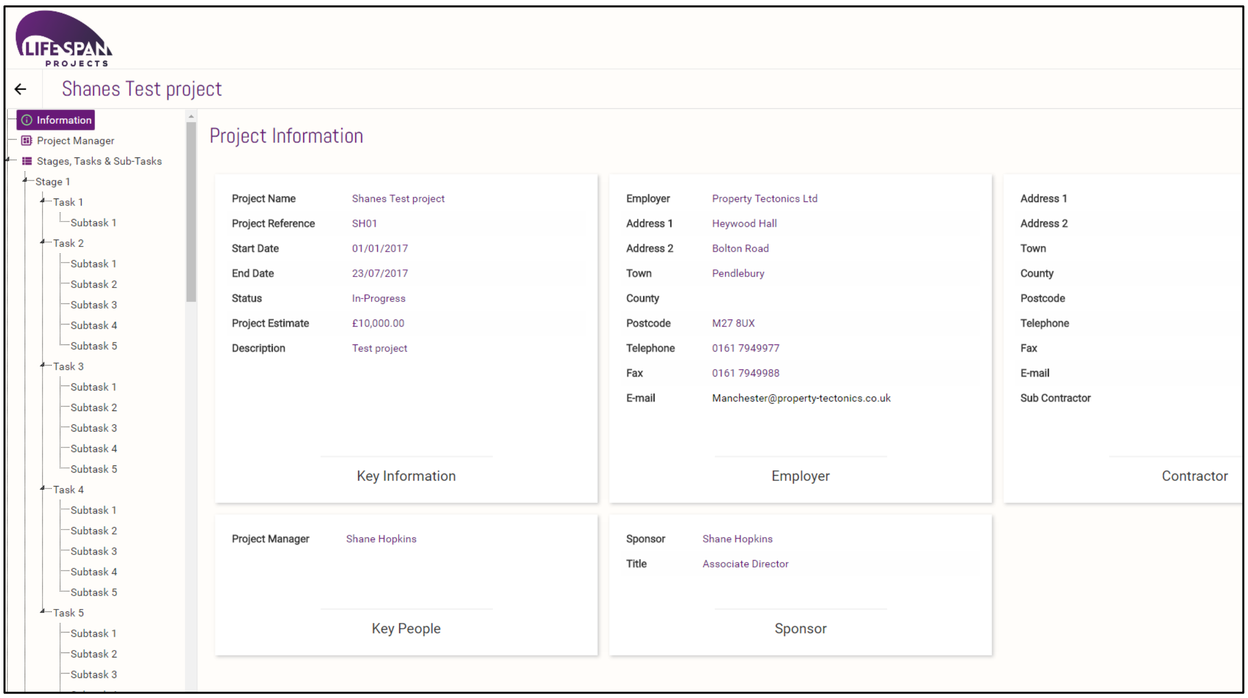
1. Log into Lifespan Housing Web
2. Click on either the '**Quick**' or '**Custom**' filter button
3. In the filter window that has now opened, build up your filter so that it will result in only the properties that you intend to import into Lifespan Projects
4. Apply the filter and verify your address now list contains only the properties that you want.
5. Click on the '**Stock Profile**' tab
6. Click on the '**Lifespan Projects**' button
7. In the window that has now opened, choose an appropriate option, then click '**Continue**'
    a. *Highlighted Property* - Choose this if you only want to send the single, currently highlighted property
    b. *Ticked Properties* - Choose this if you want to send only the properties you have "ticked" in the address list
    c. *All Properties* - Choose this if you want to send all properties that appear in your address list
8. Choose the project where you would like to add the properties
9. Tick the box if you wish to send across any accompanying works (these will appear in the 'planned works' section of projects for each address) – this enables you to choose works within a selected date range. This will also send across the schedule of rates from Lifespan Housing, which will be in addition to those already set in projects.
10. Click '**Send to Project**'.
11. If you don't want to add the selected addresses to any current projects, there is an option to create a new one by selecting 'create a new one' and filling out the required details. Clicking 'continue' will send the addresses to your new project.

When filtering your address list from within Lifespan Housing Web, do not worry if you can't get an exact address list, as you can send properties in batches (they do not have to go all at once), or you can make use of one of the three '**Send**' options in step 7 whereby you can "tick" properties to narrow your selection down even further.

NOTE If you cannot see or access the Lifespan Projects button, this will most likely be due to a lack of permissions. Please speak with your organisation's Lifespan Housing Web administrator who can grant you the appropriate rights.

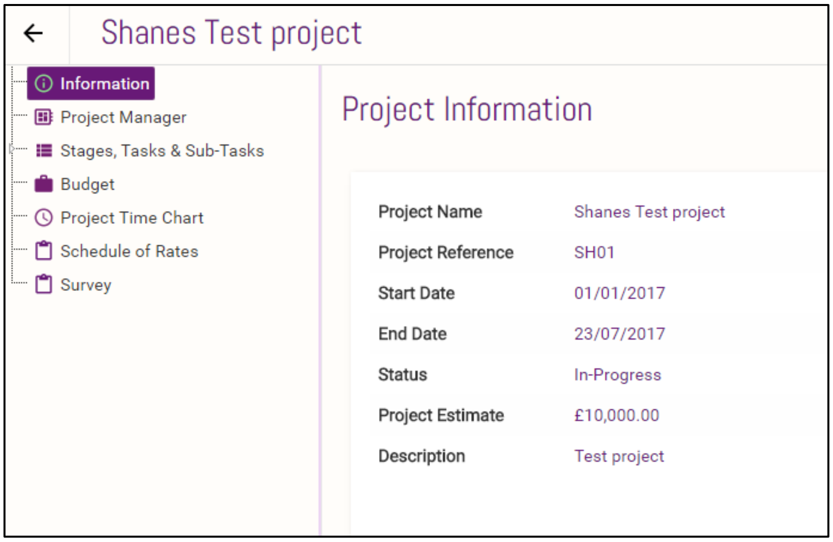
5. Managing your project

This section will describe how to manage your project, including adding stages, tasks and sub tasks, assigning task managers and setting budgets.



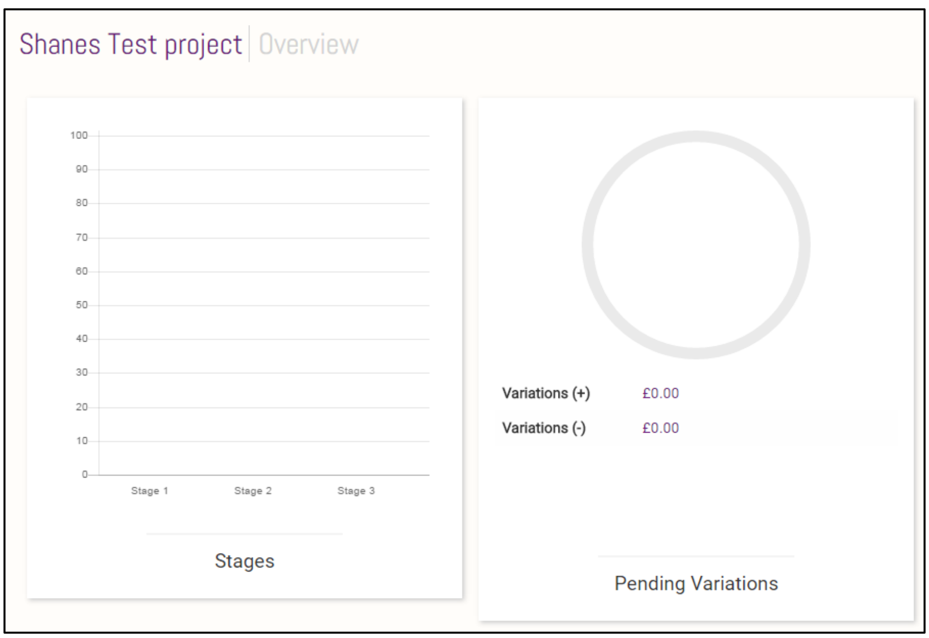
5.1 Information

The project information Screen shows key information about the project, including the project start and end dates, budget, the project manager & project sponsor.



5.2 Project Manager

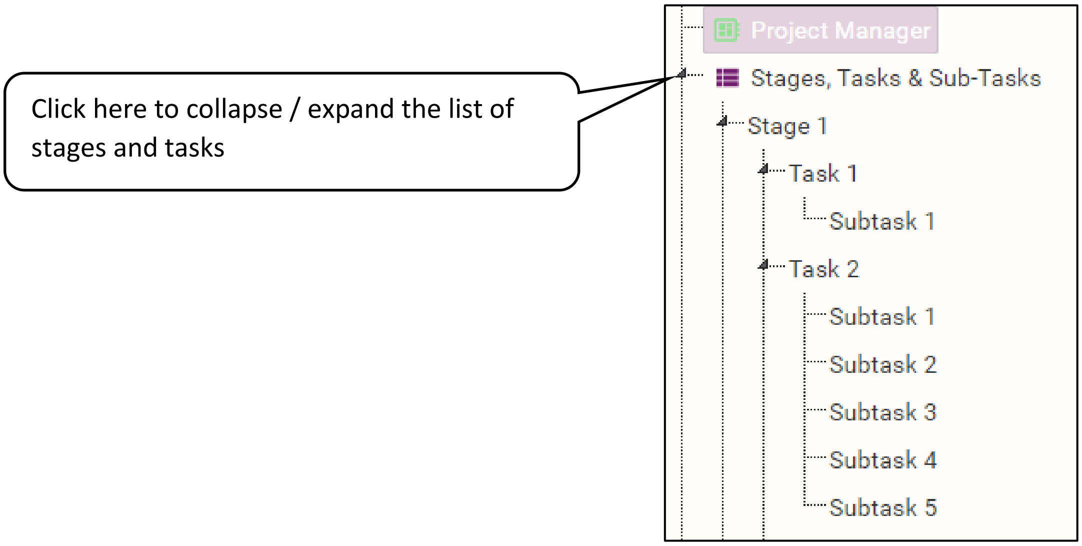
The project manager screen displays an overview of the project in graphical format.



5.3 Stages, Tasks and Sub-Tasks

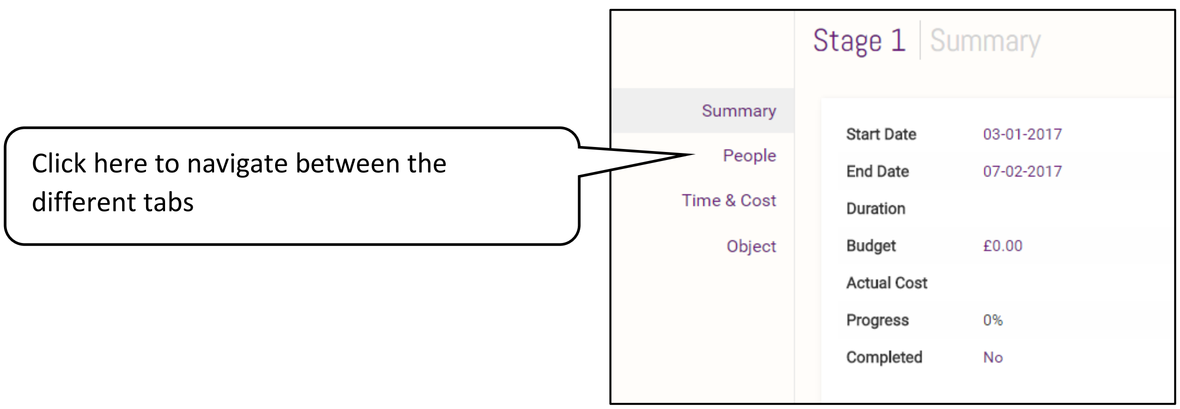
This section allows you to define Stages, Tasks and sub-tasks. Here you can define dates, assign people and add time and costs to Stages, Tasks or sub-tasks.

Clicking the collapse button collapses / expands the list of stages and tasks.

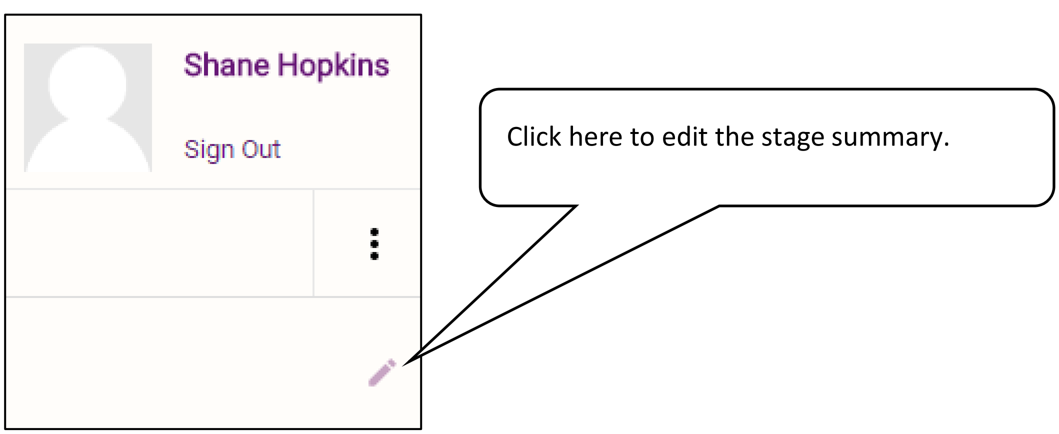


5.3.1 Editing Stage Details

1. Click on a stage on the left and the stage summary tab will open.



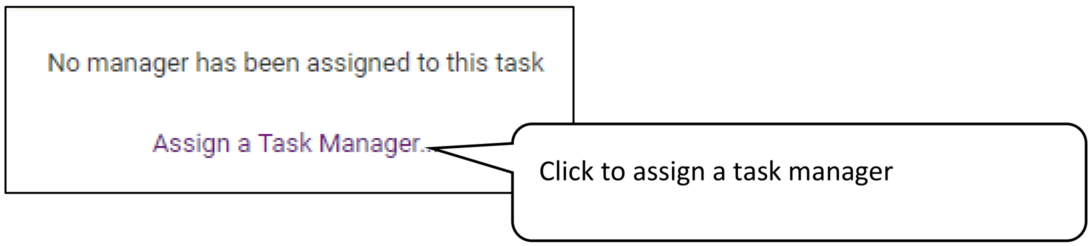
a. To edit the summary, click on the edit button at the top right of the screen.



b. Here you can rename the stage plus change the start and end dates. Make the required changes and click Save.

2. You can add a task manager to the stage if required.

a. Click Assign a Task Manager



b. Select a name form the drop-down list and click Assign to task

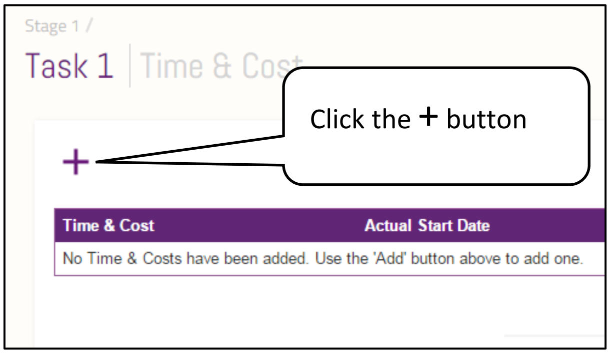
3. Click on the People tab to add people to the stage.

a. Click the Add button.

b. Select a contact and role from the drop-down menus. Tick the “Responsible” box if the person is responsible for the stage and click **Save.**

4. Click on the Time & Cost tab to add time and costs to the stage.

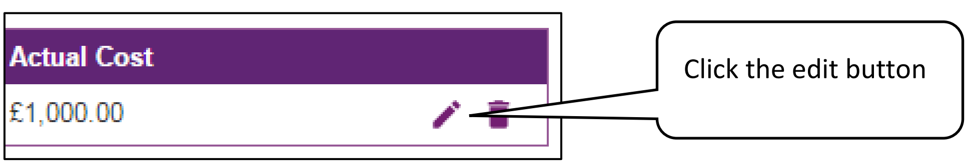
a. Click the Add button.



b. Enter the required information and click Save.

4.1 You can edit a cost by highlighting and clicking on the Edit button.

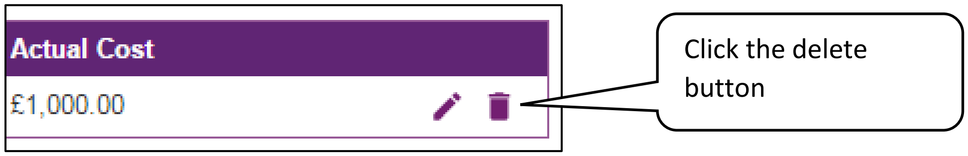
a. Click Edit



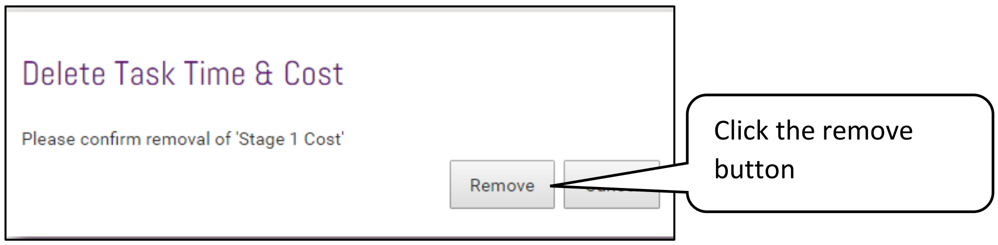
b. Make any changes as per step 3B above and click Save.

4.2 You can delete a cost by clicking on the delete button.

a. Click Delete



b. Click Remove to confirm.



5. Click on the objects tab to add objects to the stage.

a. Click the Add button.

b. Enter a description for your object.

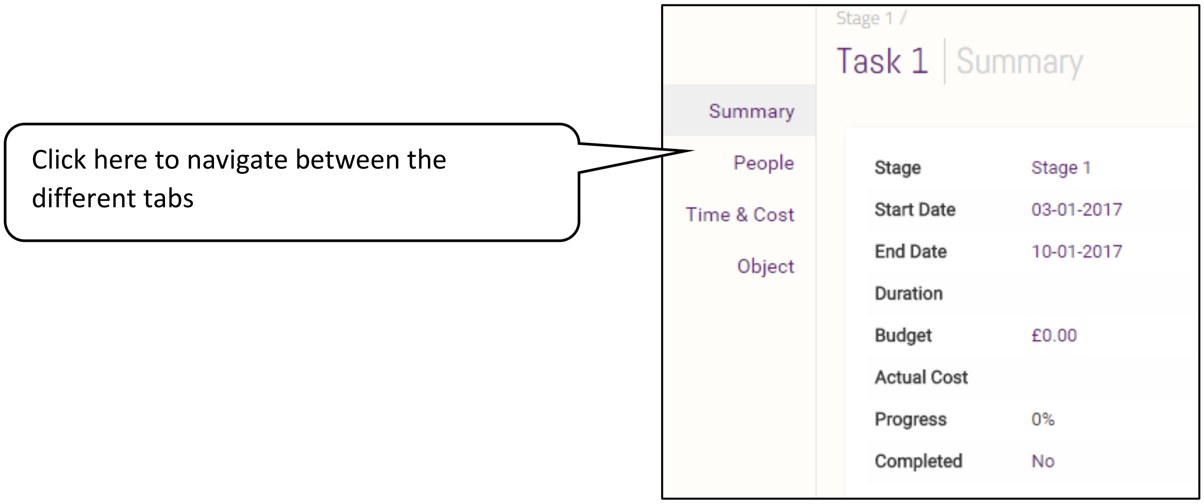
c. From the 'Object Type' drop down list, pick the type of object you want to add.

d. Specify the value for the object. Depending on the type of object you're adding some values are entered, some are picked from a pick list and some require uploading a file.

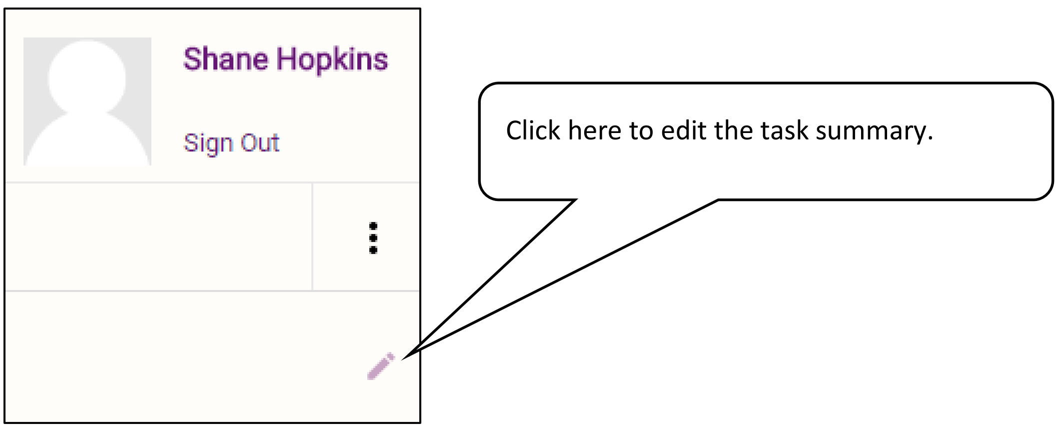
e. Click the 'Save' button.

5.3.2 Editing Task Details

1. Click on a task on the left and the task summary tab will open.



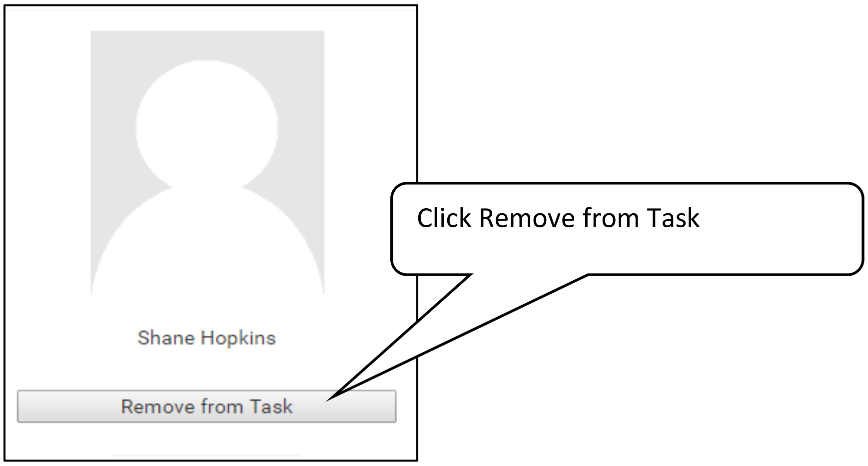
a. To edit the summary, click on the edit button at the top right of the screen.



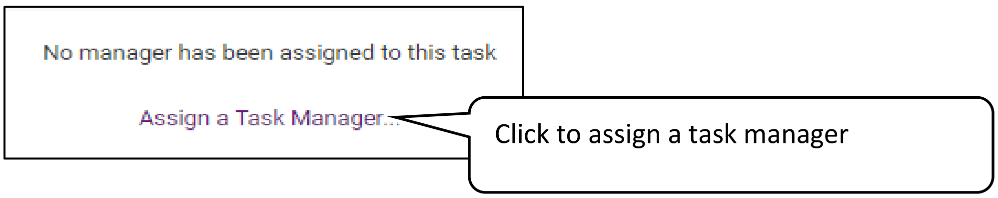
b. Here you can rename the stage plus change the start and end dates. Make the required changes and click Save.

2. The task may already have a task manager defined however you can change this if required.

a. Remove the existing task manager by clicking Remove from Task



b. Click Assign a Task Manager



c. Select a name form the drop-down list and click Assign to task

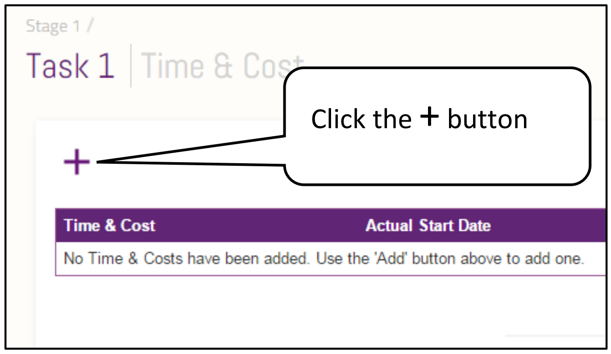
3. Click on the People tab to add people to the task.

a. Click the Add button.

b. Select a contact and role from the drop-down menus. Tick the “Responsible” box if the person is responsible for the stage and click **Save.**

4. Click on the Time & Cost tab to add time and costs to the stage.

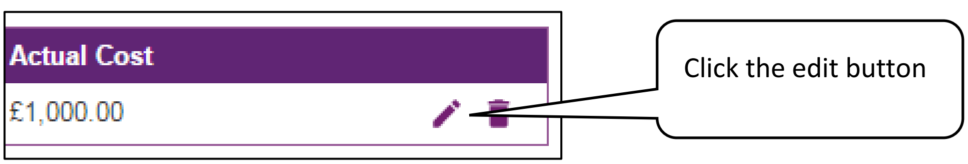
a. Click the Add button.



b. Enter the required information and click Save.

4.1 You can edit a cost be highlighting and clicking on the Edit button.

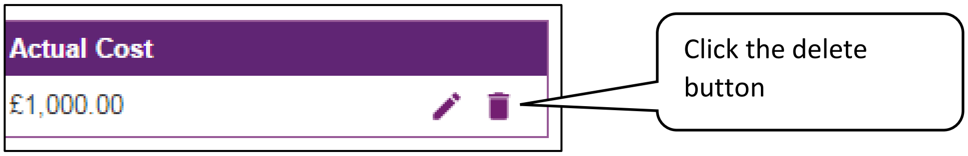
a. Click Edit



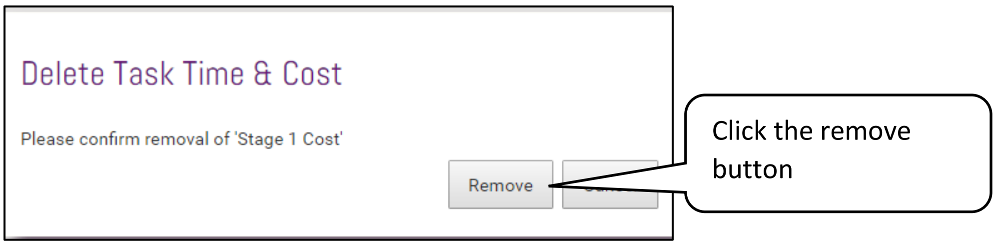
b. Make any changes as per step 3B above and click Save.

4.2 You can delete a cost by clicking on the delete button.

a. Click Delete



b. Click Remove to confirm.



5. Click on the objects tab to add objects to the stage.

a. Click the Add button.

b. Enter a description for your object.

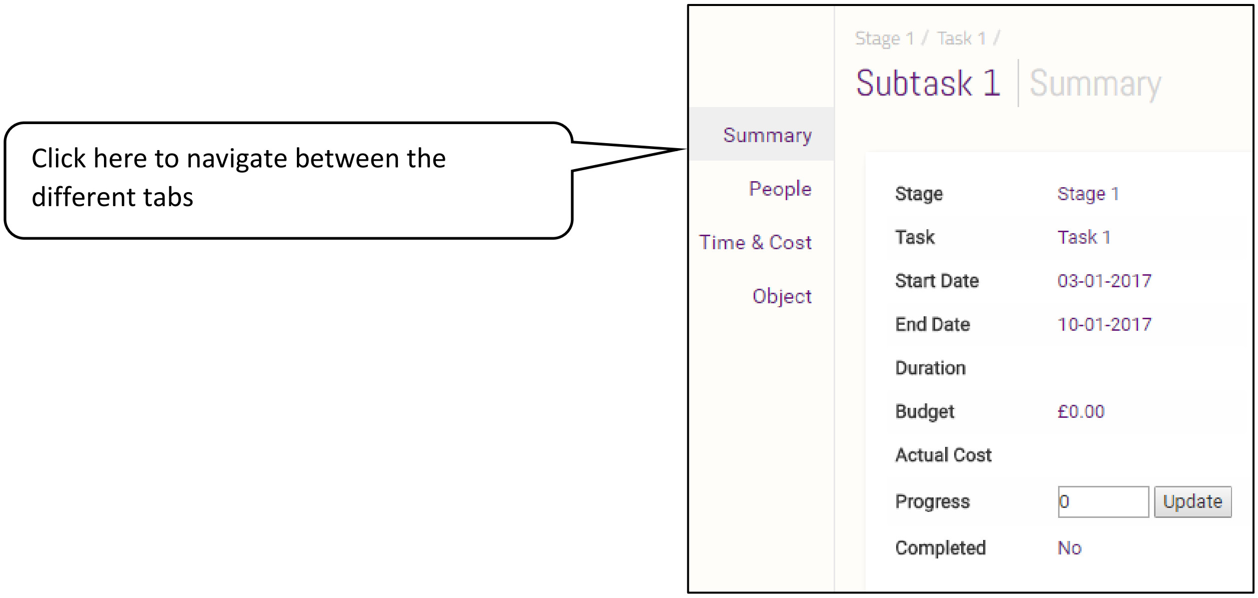
c. From the 'Object Type' drop down list, pick the type of object you want to add.

d. Specify the value for the object. Depending on the type of object you're adding some values are entered, some are picked from a pick list and some require uploading a file.

e. Click the 'Save' button.

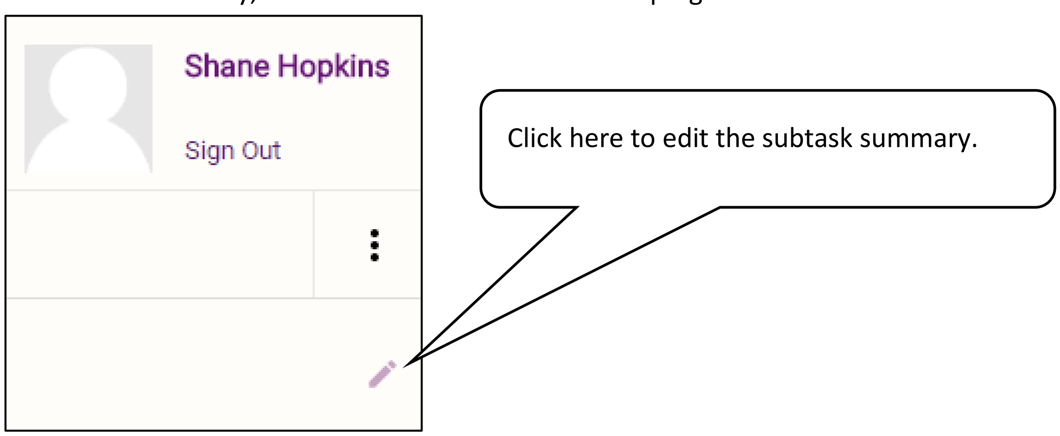
5.3.3 Editing Subtask Details

1. Click on a stage on the left and the subtask summary tab will open.



a. You can update the subtask progress by entering the percentage complete and clicking Update

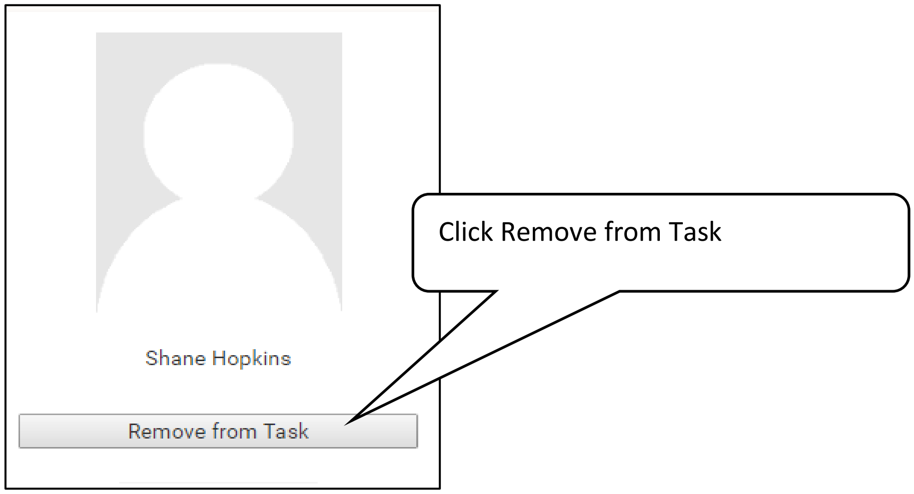
b. To edit the summary, click on the edit button at the top right of the screen.



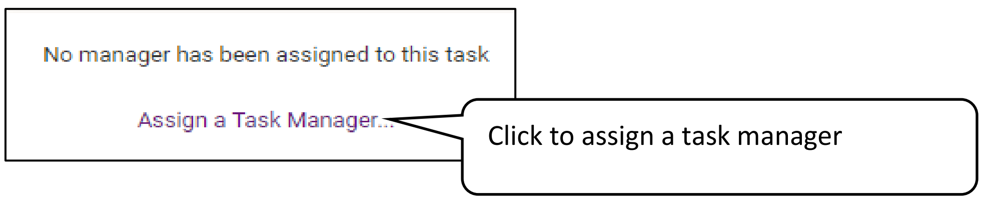
c. Here you can rename the stage plus change the start and end dates. Make the required changes and click Save.

2. The task may already have a task manager defined however you can change this if required.

a. Remove the existing task manager by clicking Remove from Task



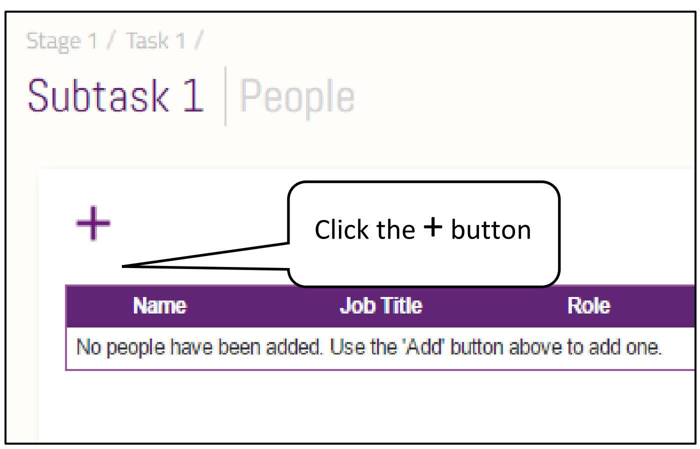
b. Click Assign a Task Manager



c. Select a name form the drop-down list and click Assign to task

3. Click on the People tab to add people to the subtask.

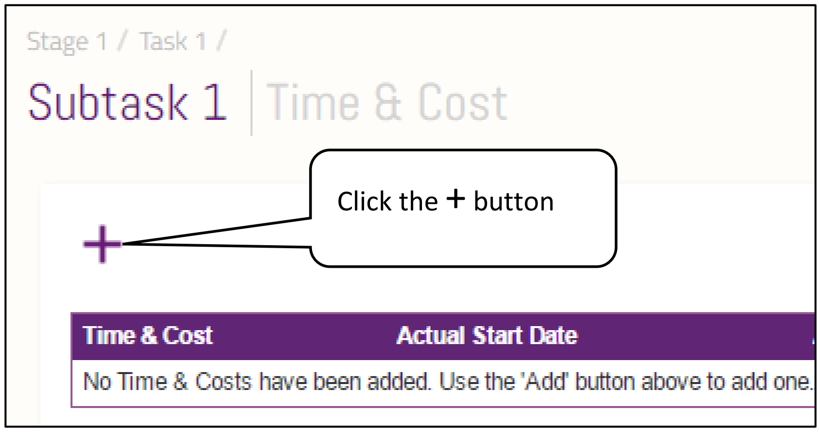
a. Click the Add button.



b. Select a contact and role from the drop-down menus. Tick the “Responsible” box if the person is responsible for the stage and click **Save.**

4. Click on the Time & Cost tab to add time and costs to the stage.

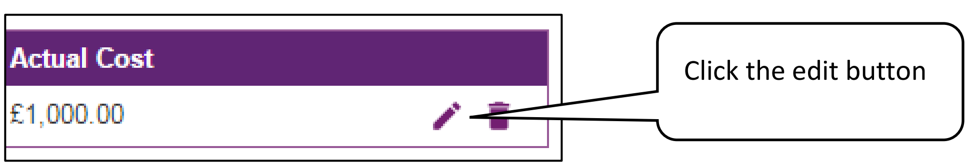
a. Click the Add button.



b. Enter the required information and click Save.

4.1 You can edit a cost be highlighting and clicking on the Edit button.

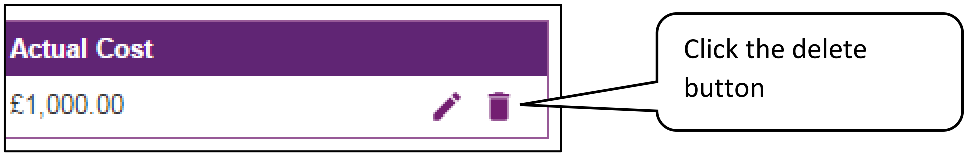
a. Click Edit



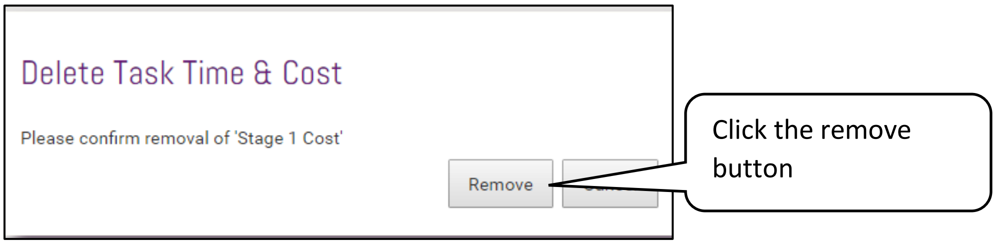
b. Make any changes as per step 3B above and click Save.

4.2 You can delete a cost by clicking on the delete button.

a. Click Delete

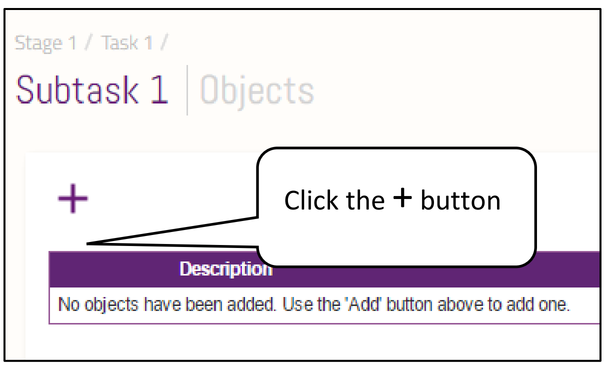


b. Click Remove to confirm.



5. Click on the objects tab to add objects to the stage.

a. Click the Add button.



b. Enter a description for your object.

c. From the 'Object Type' drop down list, pick the type of object you want to add.

d. Specify the value for the object. Depending on the type of object you're adding some values are entered, some are picked from a pick list and some require uploading a file.

e. Click the 'Save' button

5.4 Objects and their use

5.4.1 Project Manager Address List

Within Lifespan Projects there will be a need at times to manage addresses, whether that be individually or collectively. To facilitate this, a Project Manager has their own address list utility which is displayed in their 'Project Manager' object within each of their projects.

The address list will contain *all* addresses that have been added to that particular project and allows quick access to information regarding that address, as well as manipulating that address (the exact functionality will be determined by the current configuration of your Lifespan Projects account). The Project Manager address list is known as a 'Single Select' address list, meaning only one address can be active at a time.

5.4.2 Omitting Addresses

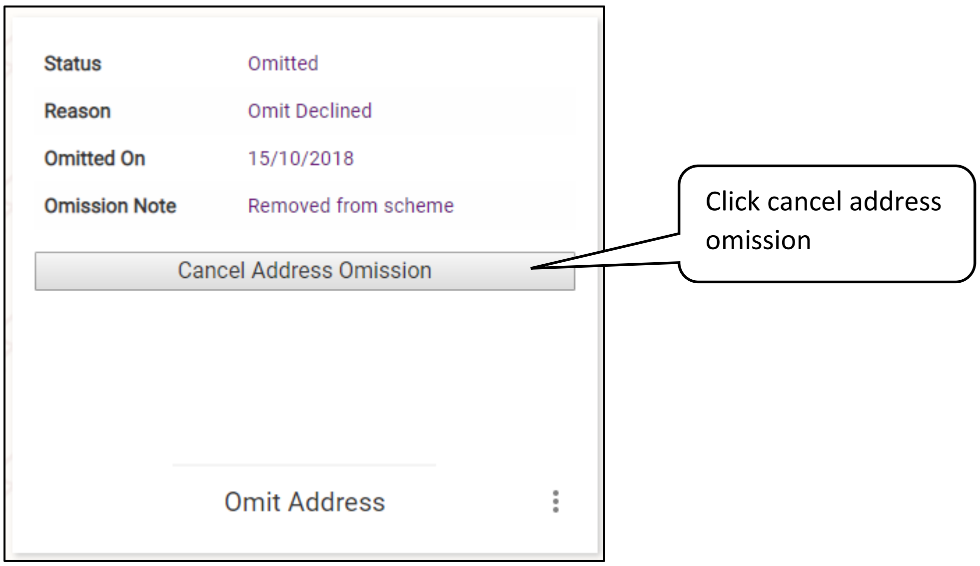
If your project is linked with Lifespan Housing and you have imported a list of addresses into it, you may at some point find the need to remove an address from that project. Instead of permanently deleting the address task(s) from the project and therefore losing all the information stored up to that point, you can instead omit it from the project so that its information is retained but is not included in the project anymore.

1. From your **My Projects** page, open the project whose tasks you wish to update
2. Go to **'Project Manager'**
3. Click on **'Addresses'** and select the address that is to be omitted from the list on the left.
4. Locate the '**Omit Address**' widget
5. In the widget, click on the '**Omit this address...**' link
6. From the drop-down list that is now shown in the widget, select the reason why you are omitting this address.
7. Click the '**Omit Address**' button

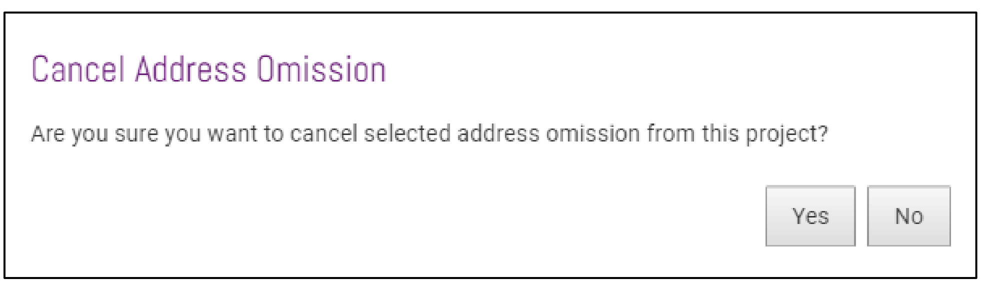
The address will be omitted from the project but shall still be present in the master project address list. The list of omission reasons is retrieved from Lifespan Housing using one of its Property Attributes pick-list values. If this list is blank, please contact us as it may be that no attribute has been configured for your account. When an address is omitted, the reason will be added against the property in Lifespan Housing by adding the same Property Attribute whose pick-list values were used to populate the drop-down list.

If for any reason an address has been omitted by mistake, or needs to be added back into the scheme, this can be done easily by working through steps 1-4 as above to get to the 'Omit Address' widget.

The tile will show as below, enabling you to see the status, reason, omission date and any notes. To cancel the omission and re-instate the address, click 'Cancel Address Omission'.



A dialog box, as shown below, will appear as confirmation you wish to continue and cancel the status of the address selected. Click 'Yes' to confirm which will add the selected property back into your project.

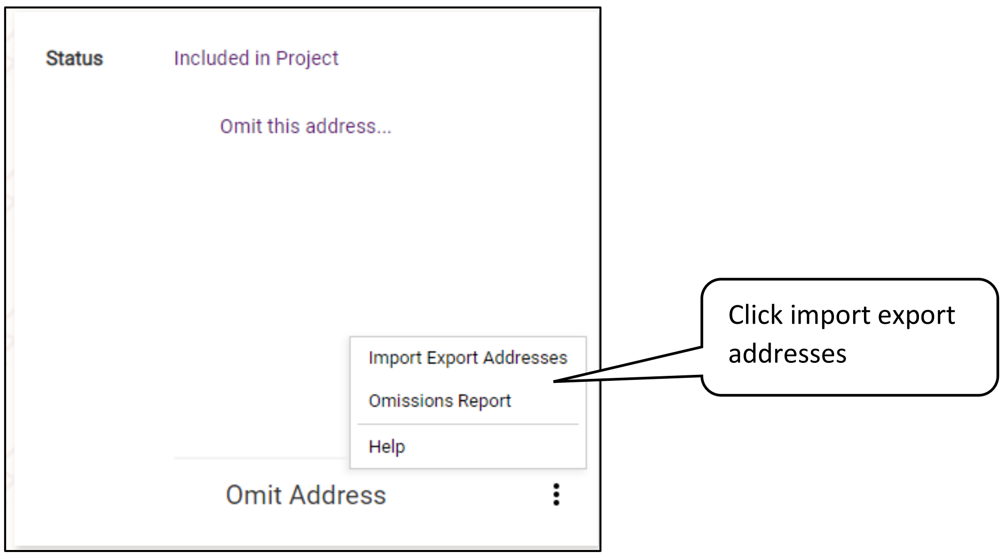


NOTE Only project managers can omit addresses and cancel omissions.

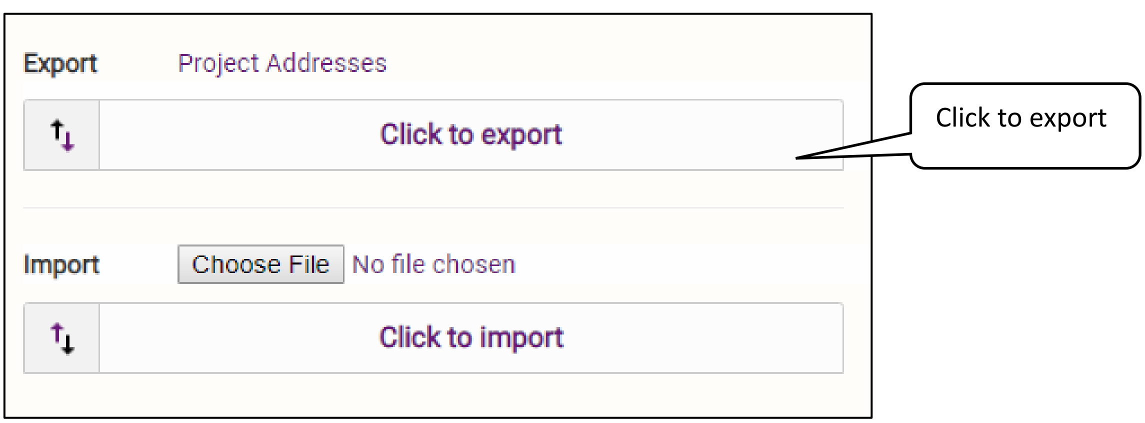
5.4.3 Deleting an address

Although omitting an address will remove data being shown in projects, it will still carry through information collected and details of the omission back to housing. Bearing this in mind, there may be cases where you wish to remove the address entirely from a project. This can be done by using the import/export function within the Addresses object in Project Manager.

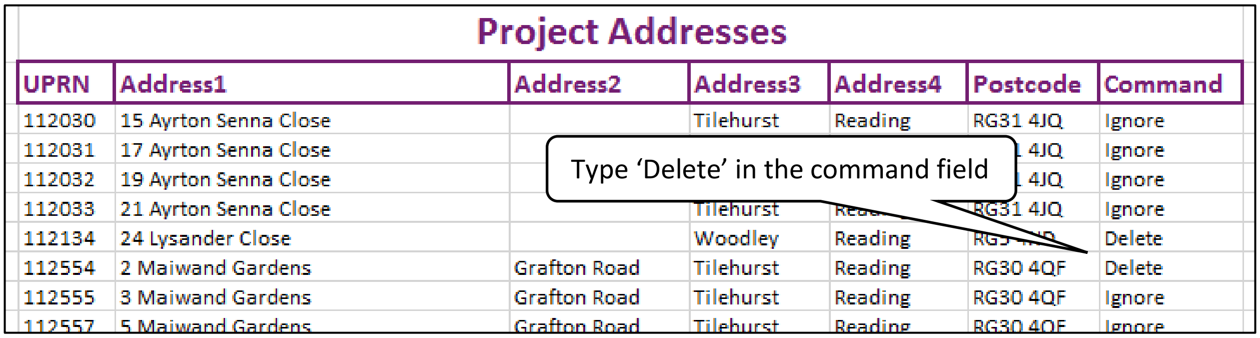
1. Open the project that contains the addresses you want to delete
2. Select ‘Project Manager’ and go to ‘Addresses’
3. Choose an address from the list on the left and find the ‘Omit Addresses’ tile. Here you have the option to either omit an address (see 4.4.2), review the omissions report (excel download), or import/export addresses
4. Hover over the three dots in the bottom right of the ‘Omit Addresses’ tile and select ‘Import Export Addresses’



5. On the next screen you will have the option of exporting or importing a file. Click to export, this will download and excel spreadsheet containing a list of all properties associated with the project.



6. The ‘Command’ field has been pre-populated with ‘Ignore’, meaning you don’t have to do anything with the addresses you want to keep in the project. For any property you want to remove from the project, just type ‘Delete’ in the command field on the corresponding row as shown in the example below;



Project Addresses

UPRN	Address1	Address2	Address3	Address4	Postcode	Command
112030	15 Ayrton Senna Close		Tilehurst	Reading	RG31 4JQ	Ignore
112031	17 Ayrton Senna Close				4JQ	Ignore
112032	19 Ayrton Senna Close				4JQ	Ignore
112033	21 Ayrton Senna Close		Tilehurst		RG31 4JQ	Ignore
112134	24 Lysander Close		Woodley	Reading	[illegible]	Delete
112554	2 Maiwand Gardens	Grafton Road	Tilehurst	Reading	RG30 4QF	Delete
112555	3 Maiwand Gardens	Grafton Road	Tilehurst	Reading	RG30 4QF	Ignore
112557	5 Maiwand Gardens	Grafton Road	Tilehurst	Reading	RG30 4QF	Ignore

As you can see above, just two properties need to be deleted and the command column has been updated accordingly. The software will skip over anything being ignored and just change anything with the value showing as ‘Delete’.

Once you have made your required changes, save the spreadsheet and go back to the import/export screen in projects. This time go to ‘choose file’ under import and select your saved spreadsheet, then press ‘click to import’.

The properties you have chosen to remove will have now been deleted and will no longer show in the list of addresses in this project.

NOTE Only project managers can delete addresses.

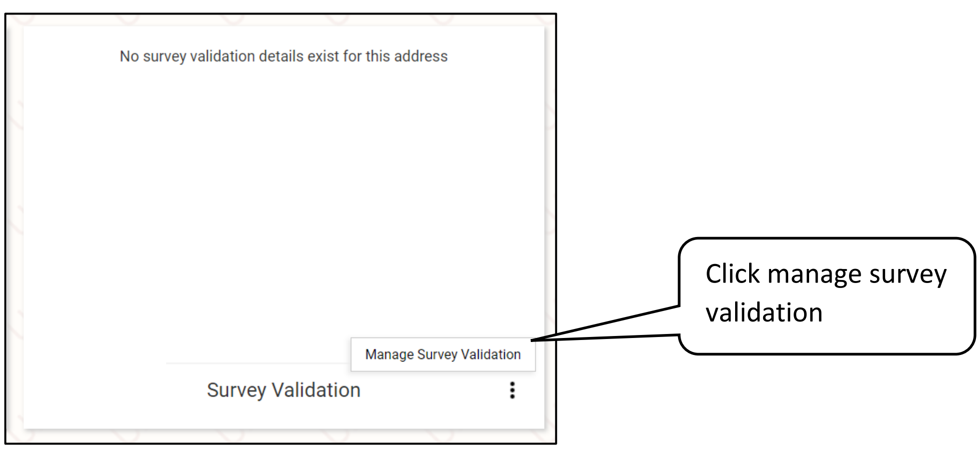
5.4.4 Adding a survey to an address

After a survey has been carried out, the results of that survey need to be entered into Lifespan Projects so that costing and works can be monitored and eventually returned back to Lifespan Housing. Fortunately, this is straight forward with the Survey object.

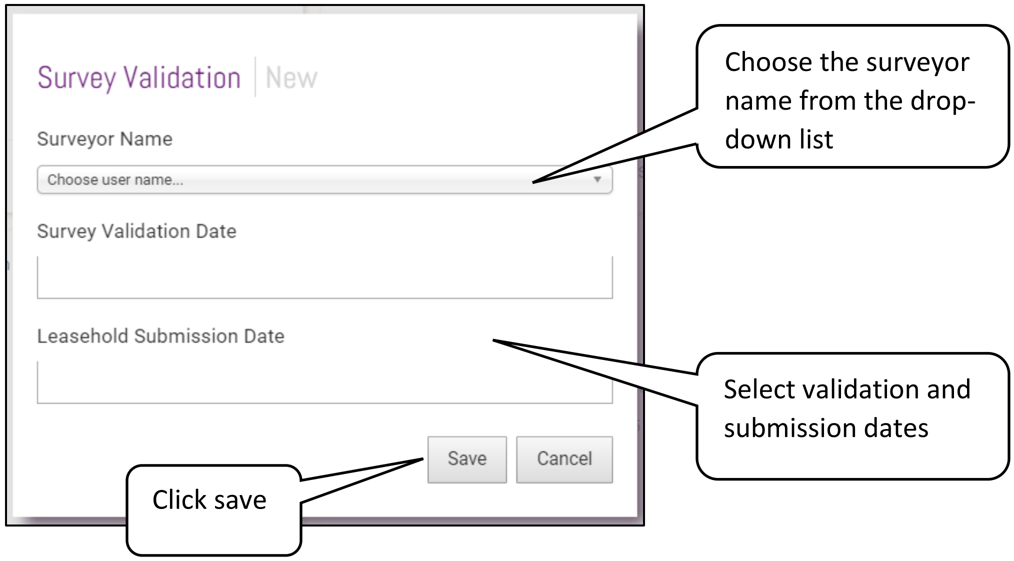
7. Open the project that contains the addresses you want to update
8. In the project tree on the left, select the 'Survey' object
9. Select the address that has been surveyed (hint: Use the search bar to quickly locate the address)
10. In the 'New Component' section, start to enter the component that has been included in the survey. You can search by description key words and/or component code.
11. In the list box that appears, select the correct component you want to add. The more precise your search term, the shorter this list will be.
12. Enter a quantity. The cost to the right of the quantity will be the unit cost, the right-hand cost will be the total cost based on the quantity you have entered.
13. Select which address specific work this rate may apply to. If it doesn't apply to any works, then leave it set to 'All'.
14. Click 'Add'
15. Repeat the above steps until all components have been added for all required addresses.

NOTE Not everyone will have access to the Survey object, meaning if you don't then you will need to request access from your Project Manager.

16. There is an option to enter when a survey has been validated.
    a. Go to the selected property
    b. Click Lifespan Housing
    c. Go to the ‘Survey Validation’ tile and select ‘Manage Survey Validation’



    d. Select from the dropdown list the user responsible for validating the survey and choose the survey validation and leasehold submission dates before saving



e. These details will now appear in the tile for this property so there is a record of these details when viewing each property

5.4.5 Issuing a practical completion

The final action when carrying out works on an address is marking them as complete. While progress monitoring will indicate they are complete when at 100%, practical completion will finalise those works and trigger some events. The main event, from a Lifespan Housing users point of view, is updating Lifespan Housing with the costs that were incurred during those works. Fortunately, the 'Practical Completion' widget makes this process very simple.

1. Open the project whose addresses you wish to update
2. Locate your project's 'Practical Completion' task; depending on your project this may be called something else.
3. From the address list, select each address that are now complete. You can select multiple addresses, as long as each address you select was completed on the same date.
4. In the 'Practical Completion' widget, select the date on which the address was actually completed.
5. Click on the 'Issue Practical Completion' button
6. Click 'Yes' in the confirmation dialog

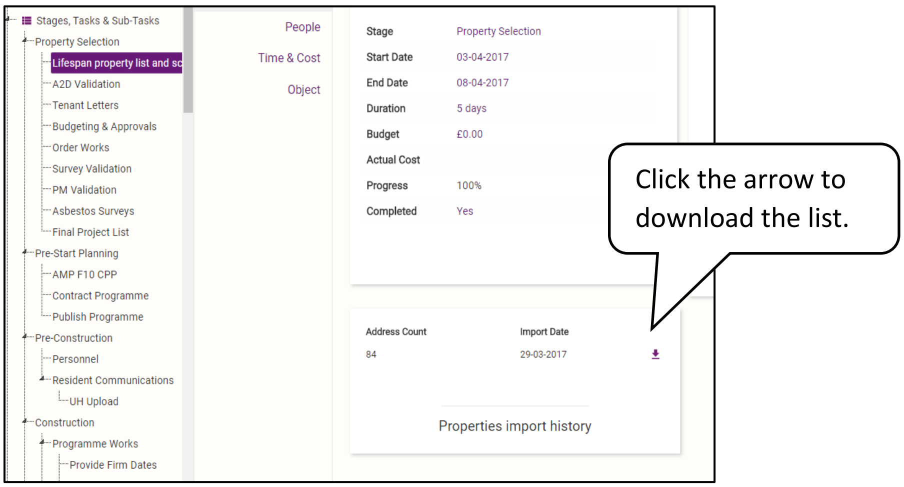
Upon completion, the addresses 'Practical Completion' (name may vary) task will be marked as being 100% complete, the overall project task completion task (see step 2 above) will be updated to reflect the overall project completeness and the works associated with the completed addresses will be issued to Lifespan Housing and works there will be marked as complete using the date specified and the total costs of the works carried out.

Not everyone will have access to the functionality as described above, if this is the case but you feel you should have such access, please see your Project Manager.

5.4.6 Property Import History

The property import history lists all the properties that were sent from Lifespan housing into Lifespan Projects. It is accessed by navigating to Stages, Tasks & Sub-Tasks > Property Selection>Lifespan property list and scope of works.

1. Click the arrow to download the list of properties in Excel.

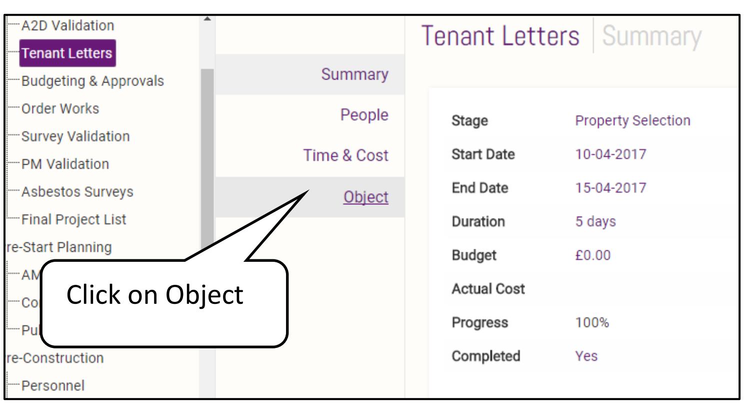


5.4.7 Tenant Contact Details

The tenant contact details object allows you to view, download or print out the tenant details for a specific project. You can also input new or edit existing data using the import/export function.

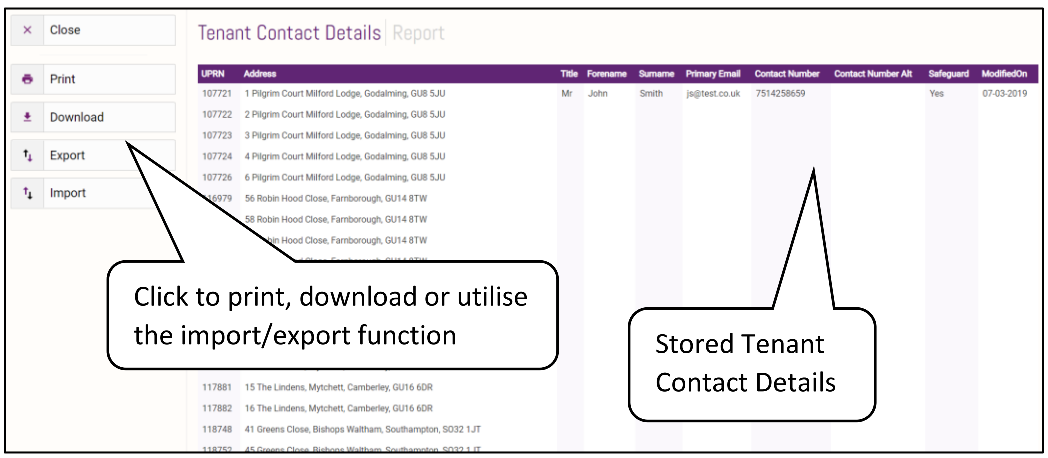
This object has various locations as it is linked to all letter and survey stages within the project. In this example it has been accessed by navigating to Stages, Tasks & Sub-Tasks > Property Selection>Tenant Letters.

1. Click on Object

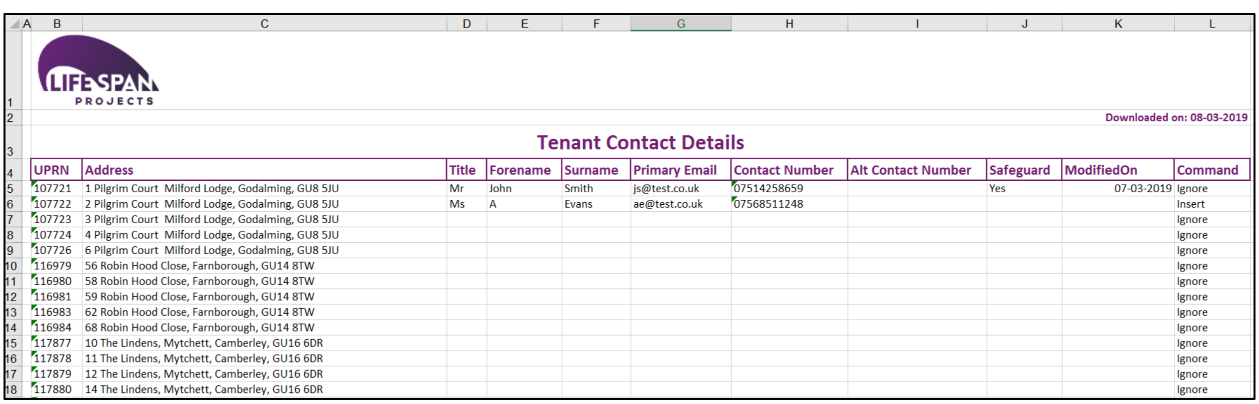


2. Click on Tenant Contact Details

From here you can see all saved details in the report on the right of the screen. Click the buttons on the left to either print or download the information or use the import/export function.



3. Click on 'Export' to download a spreadsheet which includes all tenant information for the project. The 'Command' column will by default be completed with 'Ignore' and unless you change this, these rows will be unaffected when imported back into the system.



Downloaded on: 08-03-2019

Tenant Contact Details

UPRN	Address	Title	Forename	Surname	Primary Email	Contact Number	Alt Contact Number	Safeguard	ModifiedOn	Command
107721	1 Pilgrim Court Milford Lodge, Godalming, GU8 5JU	Mr	John	Smith	js@test.co.uk	07514258659		Yes	07-03-2019	Ignore
107722	2 Pilgrim Court Milford Lodge, Godalming, GU8 5JU	Ms	A	Evans	ae@test.co.uk	07568511248				Insert
107723	3 Pilgrim Court Milford Lodge, Godalming, GU8 5JU									Ignore
107724	4 Pilgrim Court Milford Lodge, Godalming, GU8 5JU									Ignore
107726	6 Pilgrim Court Milford Lodge, Godalming, GU8 5JU									Ignore
116979	56 Robin Hood Close, Farnborough, GU14 8TW									Ignore
116980	58 Robin Hood Close, Farnborough, GU14 8TW									Ignore
116981	59 Robin Hood Close, Farnborough, GU14 8TW									Ignore
116983	62 Robin Hood Close, Farnborough, GU14 8TW									Ignore
116984	68 Robin Hood Close, Farnborough, GU14 8TW									Ignore
117877	10 The Lindens, Mytchett, Camberley, GU16 6DR									Ignore
117878	11 The Lindens, Mytchett, Camberley, GU16 6DR									Ignore
117879	12 The Lindens, Mytchett, Camberley, GU16 6DR									Ignore
117880	14 The Lindens, Mytchett, Camberley, GU16 6DR									Ignore

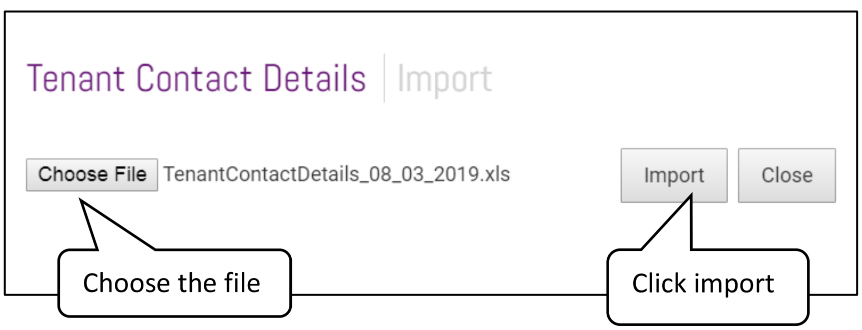
- To include new contact information, just enter the details on the corresponding address row and type 'Insert' in the command column.
- To amend existing data, change the row details and type 'Update' in the command column.
- To delete existing data, type 'Delete' in the command column of the row you want to remove.

4. The 'Safeguard' column is linked with Lifespan Projects Mobile software and is used to flag a property where the surveyor should be made aware of any risk.
   - To mark a property as having a safeguarding issue, type 'Yes' in this column of the corresponding address row.

   In projects mobile, for any properties with a safeguarding issue, 'Do Not Visit Alone' will appear in a red box at the bottom right corner of the property details page within the software.

Complete the spreadsheet with tenant details as required and save the file to your computer.

5. Back in Projects, click on 'Import' to upload the data back into the system. The dialog box will appear as below, choose the saved file and click 'Import'.

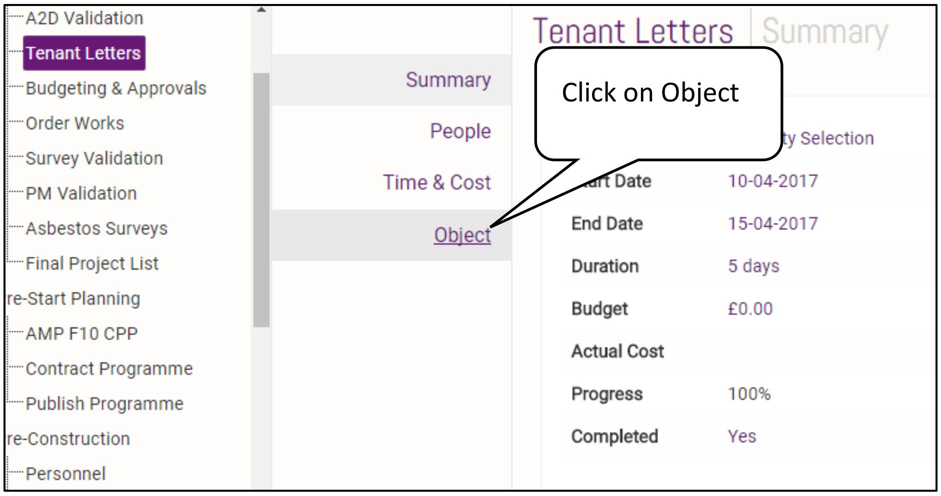


When you refresh or go back into the object, you will now see the updated tenant contact details listed in the report screen.

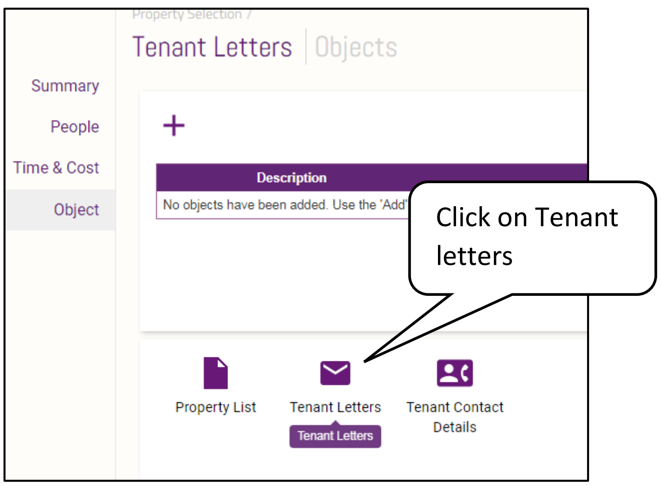
5.4.8 Generating Tenant Letters

The tenant letters widget allows you to generate letters for sending out to tenants. It is accessed by navigating to Stages, Tasks & Sub-Tasks > Property Selection>Tenant Letters.

1. Click on Object

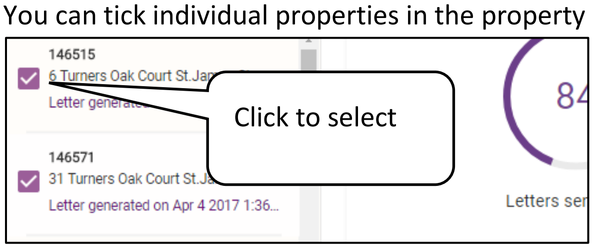


2. Click on Tenant Letters

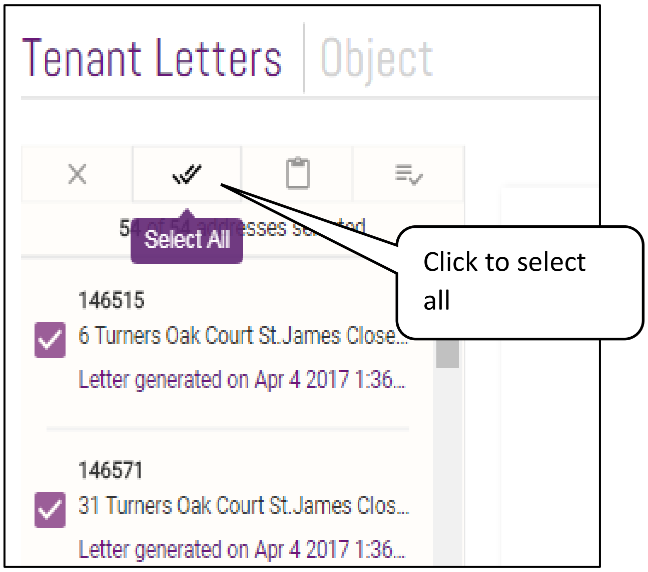


3. Select the properties you wish to include:

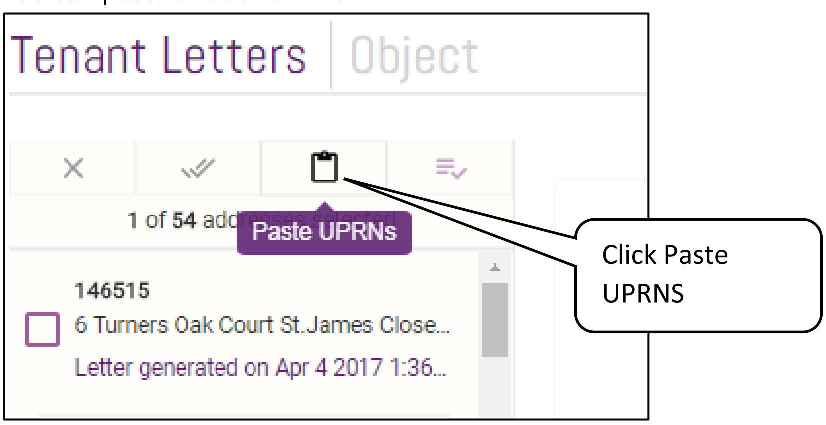
   a. You can tick individual properties in the property list.



b. You can select all properties at once by clicking Select All

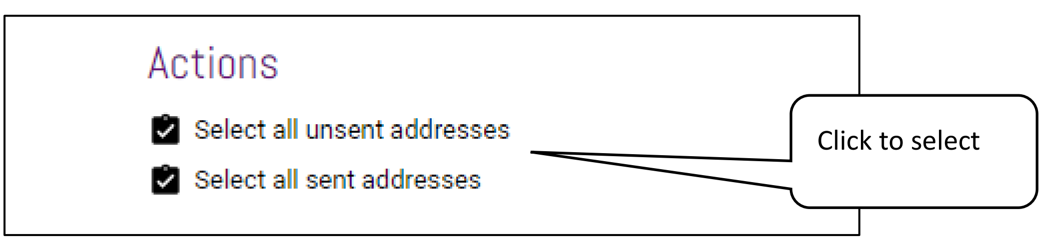


c. You can paste a list of UPRNs



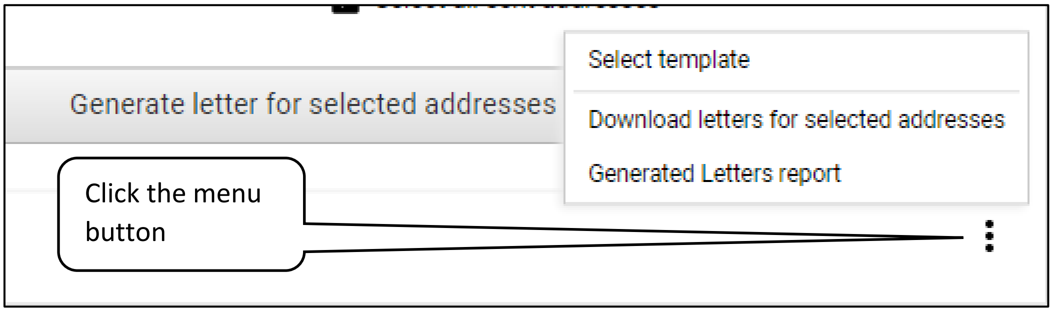
Paste the list off UPRNS in the box that pops up and click Select.

d. You can select all sent or unsent addresses



4. Select the template letter (if you have not already done so)

a. Click the menu button, then click Select template



b. Select the template document then click save.

5. You can now Click Generate letters for selected addresses. When the letters have been generated a zip-file containing the letters will automatically download

6. You can return at any point and download the letters for the selected properties
   a. Click the menu button

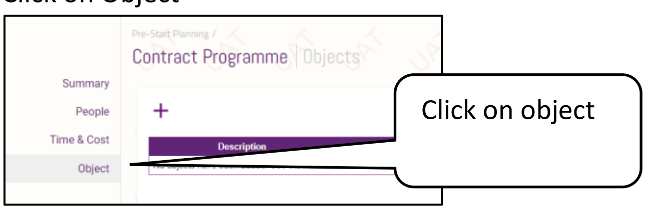
   b. Click download letters for the selected properties

   c. Click Yes at the prompt

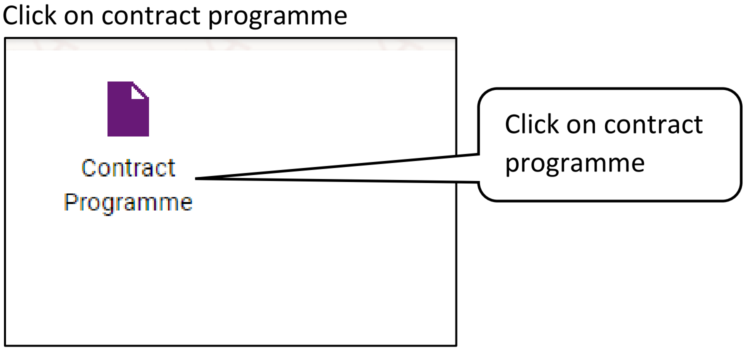
5.4.9 Contract Programme

The Contract Programme widget allows contractors to add planned start dates. It is accessed by navigating to Stages, Tasks & Sub-Tasks > Pre-start planning>Contract Programme.

1. Click on Object



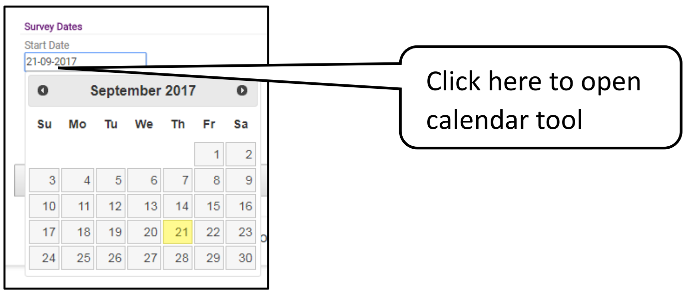
2. Click on contract programme



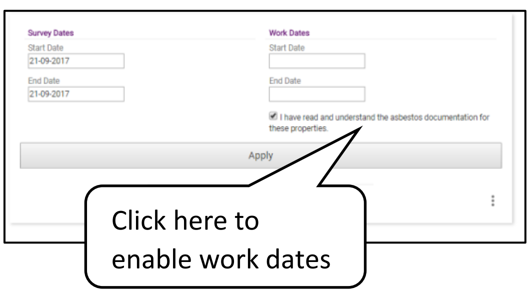
3. Select the properties you wish to include:

a. You can tick individual properties in the property list.
b. You can select all properties be clicking Select All.
c. You can paste in a list of UPRNS. Paste the list off UPRNS in the box that pops up and click Select.

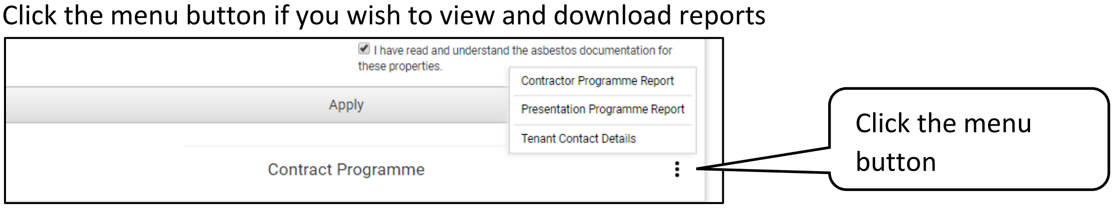
4. Use the calendar tool to set the start and end dates for the survey. If you want to use different dates for different properties you will have to repeat this process for each batch of properties with different dates.



5. You cannot enter work dates until you tick the box so say you have read and understand the asbestos documentation for these properties. Tick the box when applicable and use the calendar tool to enter the start and end dates for the works. Again, if you want to use different dates for different properties you will have to repeat this process for each batch of properties with different dates.



6. Click Apply.
7. Click the menu button if you wish to view and download reports

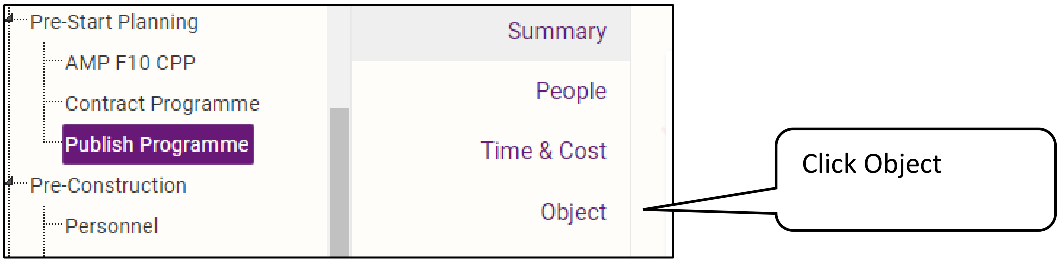


a. Contractor Programme report. This opens up in a new tab and shows planned and actual completion dates per property. This can be printed or downloaded to excel.
b. Presentation Programme. This exports the programme to excel in a Gannt chart format.
c. Tenant contact details. This opens up in a new tab and allows to import and export tenant contact details. Not all users have access to this object.

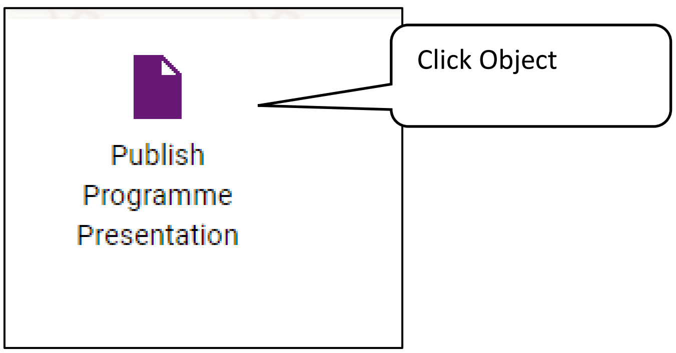
5.4.10 Publish Programme Presentation

Publish programme presentation is accessed by navigating to Stages, Tasks & Sub-Tasks > Pre-start planning>Publish Programme.

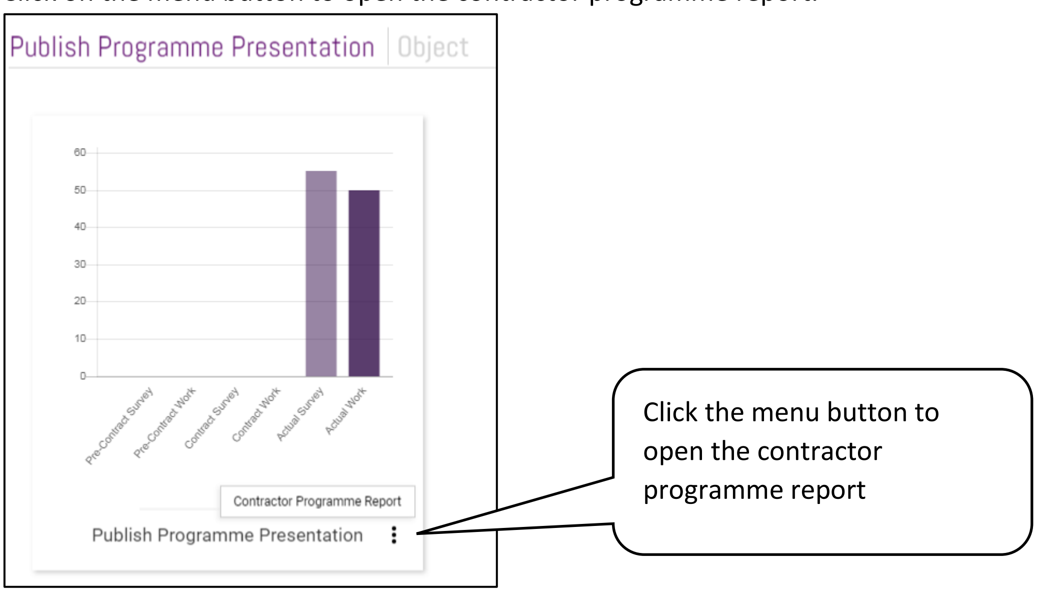
1. Click on Object



2. Click on Publish Programme Presentation



3. Click on the menu button to open the contractor programme report.

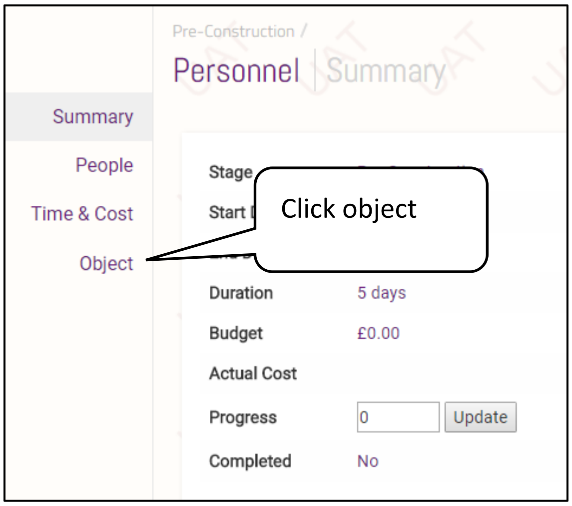


4. The report opens in a new tab and can be printed or exported to excel.

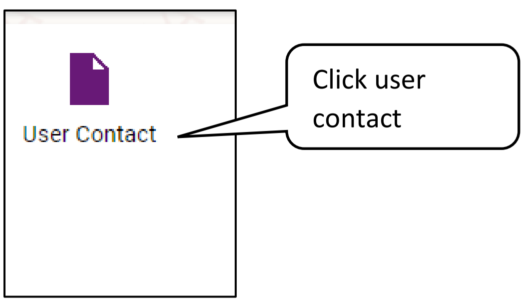
5.4.11 User Contacts

User Contacts is accessed by navigating to Stages, Tasks & Sub-Tasks >Pre-Construction>Personnel.

1. Click on object



2. Click on User contact



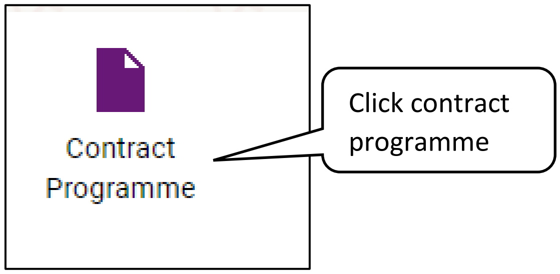
3. The list of user contacts will be displayed. You can send a user an email by clicking on the icon next to the user's name.

5.4.12 Provide Firm Dates

Provide firm dates is accessed by navigating to Stages, Tasks & Sub-Tasks>Construction>Programme Works> Provide Firm Dates.

1. Click on Object.

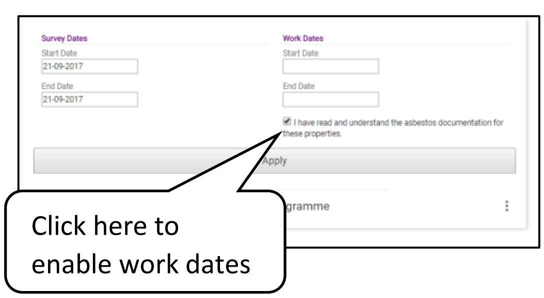
2. Click on Contract Programme.



3. Select the properties you wish to include:
    a. You can tick individual properties in the property list.
    b. You can select all properties be clicking Select All.
    c. You can paste in a list of UPRNS. Paste the list off UPRNS in the box that pops up and click Select.

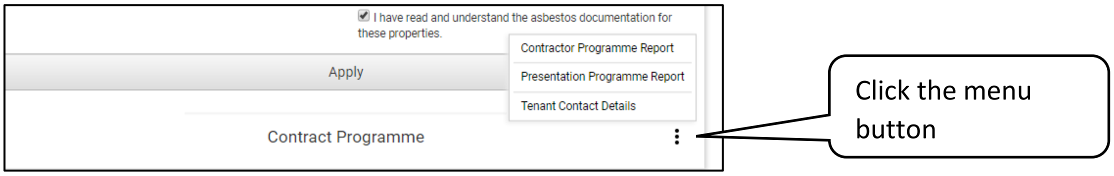
4. Use the calendar tool to set the start and end dates for the survey. If you want to use different dates for different properties, you will have to repeat this process for each batch of properties with different dates.

5. You cannot enter work dates until you tick the box so say you have read and understand the asbestos documentation for these properties. Tick the box when applicable and use the calendar tool to enter the start and end dates for the works. Again, if you want to use different dates for different properties you will have to repeat this process for each batch of properties with different dates.



6. Click Apply.

7. Click the menu button if you wish to view and download reports

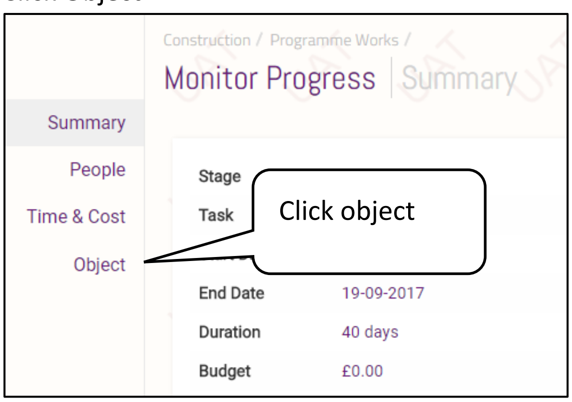


   a. Contractor Programme report. This opens up in a new tab and shows planned and actual completion dates per property. This can be printed or downloaded to excel.
   b. Presentation Programme. This exports the programme to excel in a Gannt chart format.
   c. Tenant contact details. This opens up in a new tab and allows to import and export tenant contact details. Not all users have access to this object.

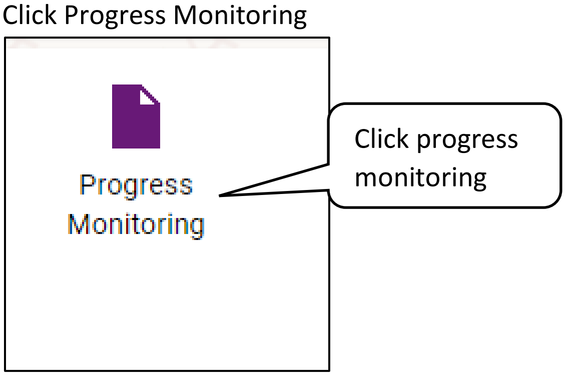
5.4.13 Monitor Progress

Monitor Progress is accessed by navigating to Stages, Tasks & Sub-Tasks>Construction>Programme Works>Monitor Progress

1. Click Object



2. Click Progress Monitoring

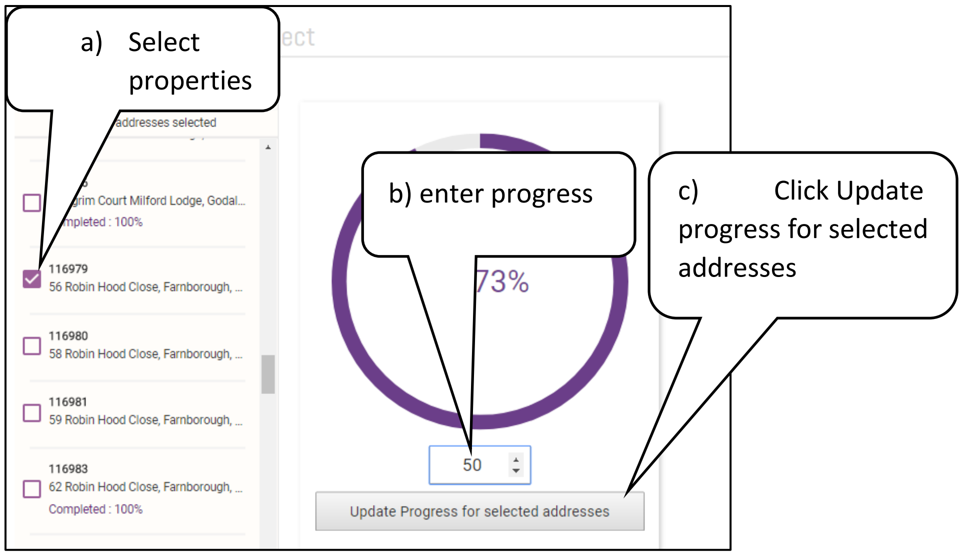


3. Progress can be updated via the object.

    a. Select the properties you wish to update the progress for

    b. Enter the progress for each selected address

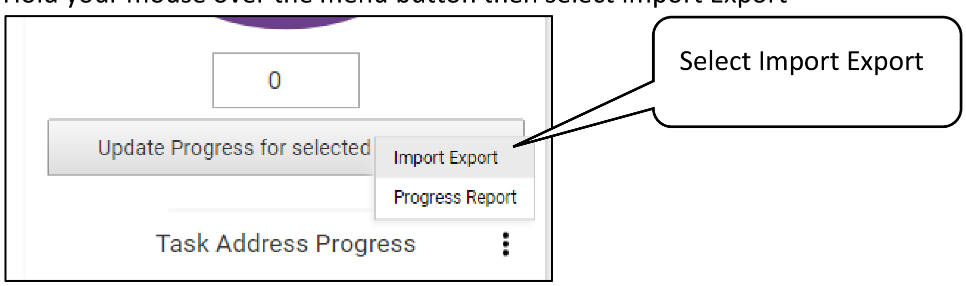
    c. Click Update progress for selected addresses



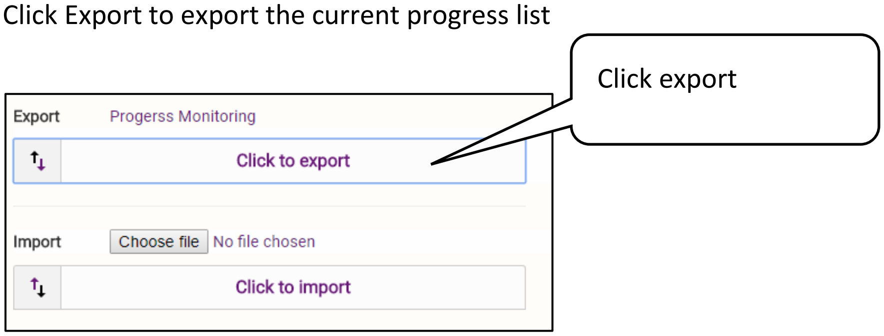
4. Progress can also be updated by uploading from a spreadsheet.

    a. Open the progress monitoring object.

    b. Hold your mouse over the menu button then select Import Export



    c. Click Export to export the current progress list

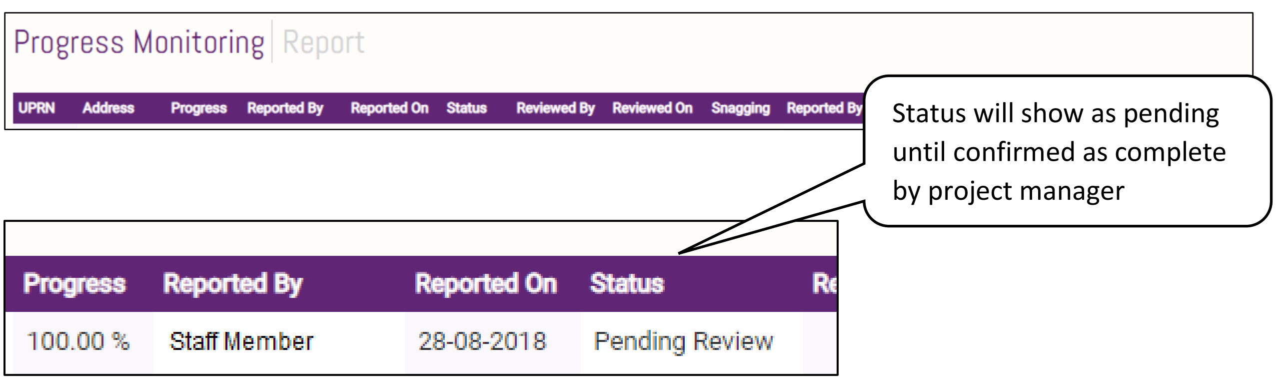


d. Make the required changes to the spread sheet and save it to your computer.

e. Click choose file and select the file you have just saved.

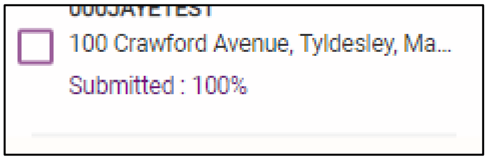
f. Click import.

5. Clicking on progress report will open a new window where the progress for each property can be printed or exported to excel.

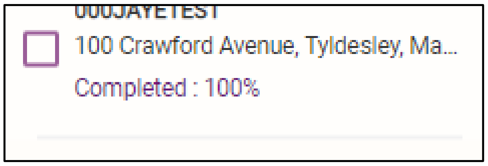


6. The report has multiple headings which are populated at the different points of completion, these show who has been responsible for reporting and reviewing at each stage along with recording the date submitted. The status will show as 'Pending Review' at first, as all progress updates need to be checked and verified by the project manager before being finalised.

7. There are two stages within the progress monitoring object.
   a. Submitted – will show when the progress percentage has been updated.

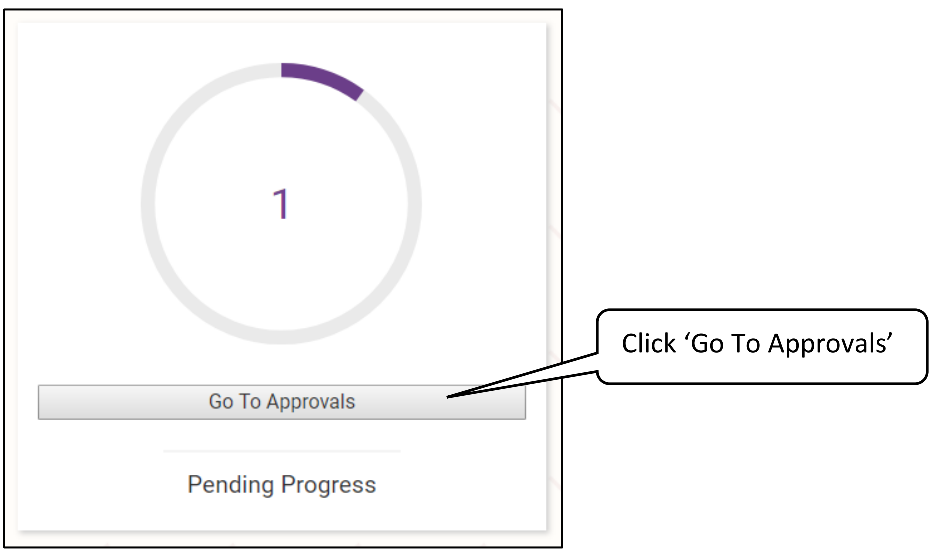


b. Completed – will show once the progress has been reviewed and accepted by the project manager.



If a property is updated but the project manager decides it is not at the level of progress which has been reported, they can choose to decline the update. This will then remove the status from the property and no additional progress percentage will be allocated to the selected address.

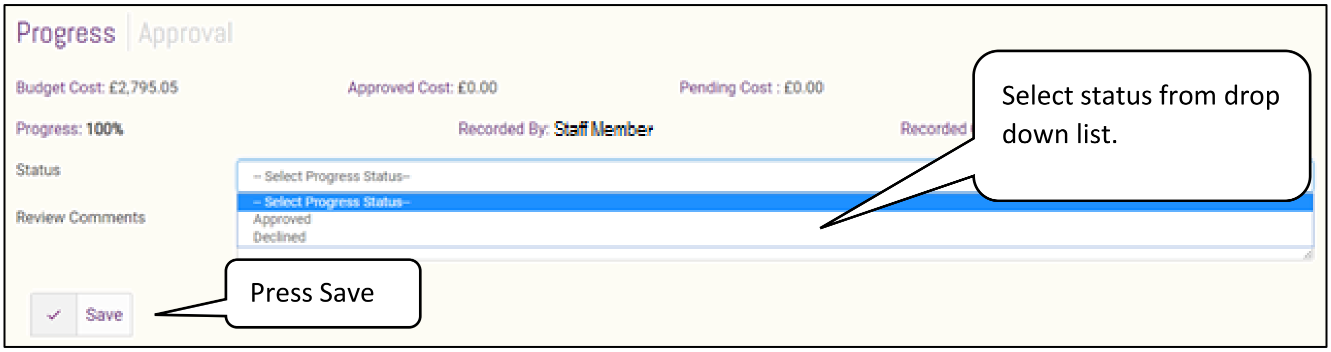
8. As the project manager, you have the responsibility to review any approvals for progress.
   a. Go to 'Project Manager'



   b. Whenever an item needs approving it will show in the 'Pending Approvals' tile. Here you can see there is just one item waiting approval.

   c. Select the address from the list.

   d. The approvals screen as shown below gives you an outline of the costs for the selected property, along with some of the same details that are in the progress report. Change the status to either 'Approved' or 'Declined' and enter any comments in the 'Review Comments' field. Press save to confirm.

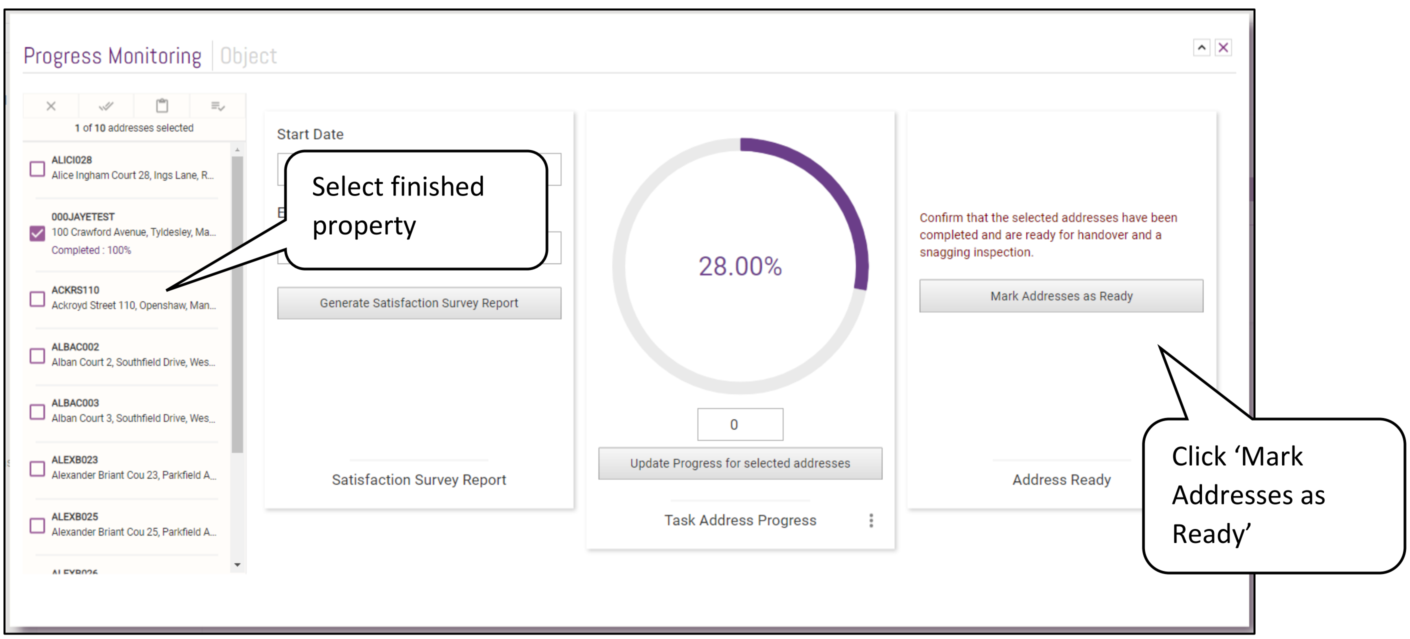


Whenever the project manager updates the approvals, the progress report will be updated to show all

Progress	Reported By	Reported On	Status	Reviewed By	Reviewed On	St
100.00 %	Staff Member	28-08-2018	Approved	Project Manager	29-08-2018	N
100.00 %	Staff Member	29-08-2018	Declined	Project Manager	29-08-2018	N

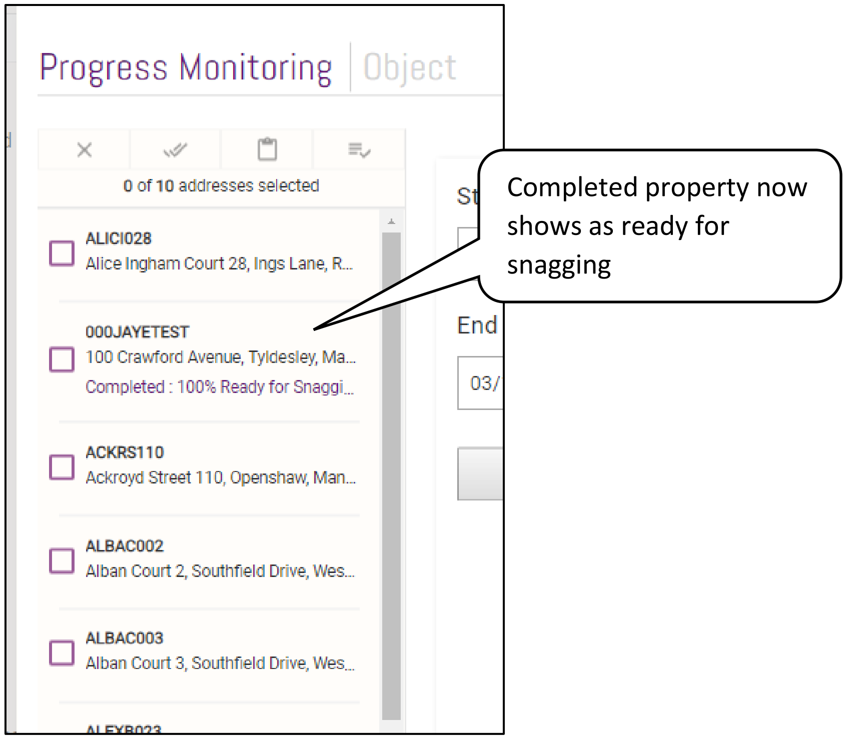
actions taken.

9. Once a property is 100% complete, it can be marked as ready. This confirms that it is ready for handover and the address will be sent to the appropriate surveyor for a snagging inspection.
   a. Go to Stages, Tasks & Sub-Tasks>Construction>Programme Works>Monitor Progress.



   b. Click on the object 'Progress Monitoring'
   c. Tick the one or more properties you want to mark as ready and click on 'Mark Addresses as Ready'. You will be asked to confirm you want to proceed.

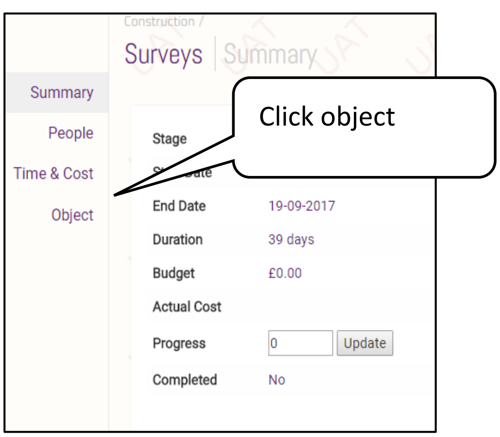
d. Once you have confirmed, the address list on the left will be updated to show the new status. You can now see the property that was selected is now showing as 'Completed: 100% Ready for Snagging'.



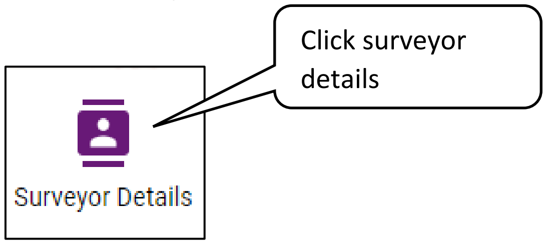
5.4.14 Surveyor Details

Surveyor Details is accessed by navigating to Stages, Tasks & Sub-Tasks>Construction>Surveys.

1. Click on Object



2. Click on Surveyor details



3. Surveyor Details can be added via the object.

    a. Select the required properties

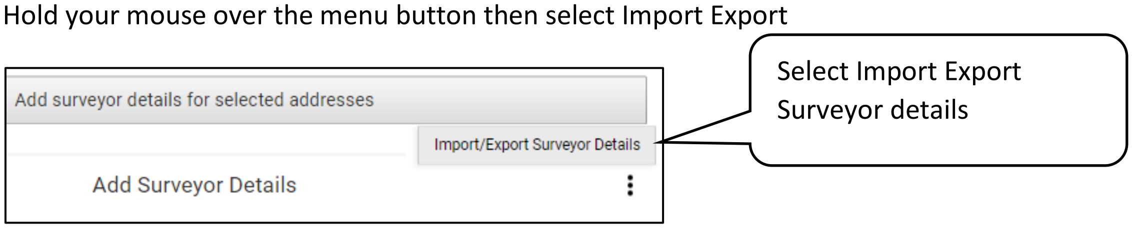
    b. Enter the surveyor details

    c. Click add surveyor deals for selected addresses

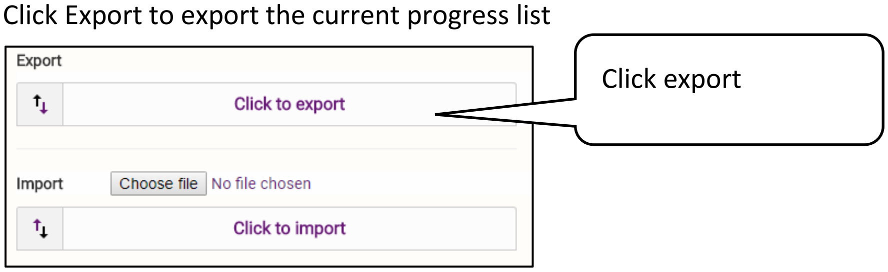
4. Surveyor details can also be updated by uploading from a spreadsheet.

    a. Open the surveyor details object.

    b. Hold your mouse over the menu button then select Import Export



Click Export to export the current progress list



c. Make the required changes to the spread sheet and save it to your computer.

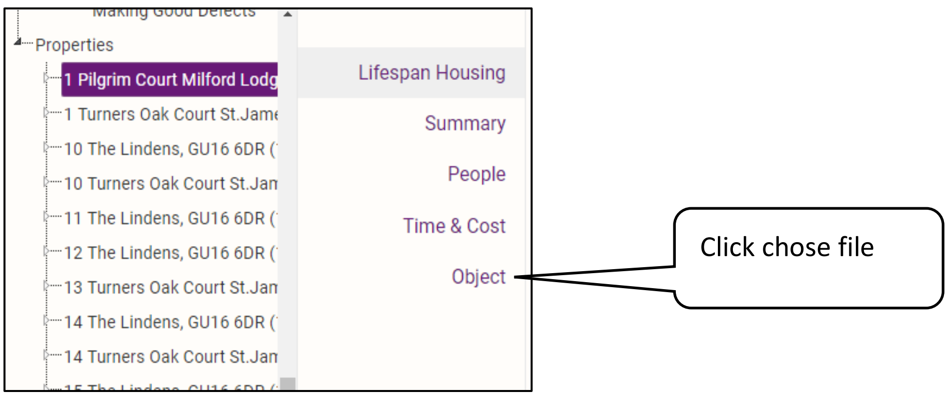
d. Click choose file and select the file you have just saved.

e. Click import.

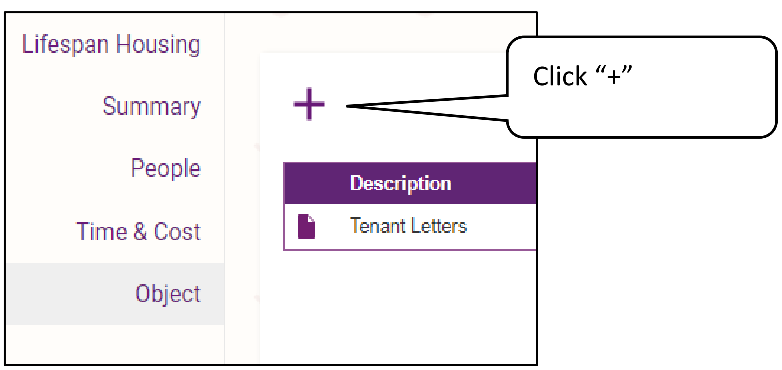
5.4.15 Surveys

Surveys can be added to a property by navigating to Stages, Tasks & Sub-Tasks>Properties then selecting a property.

1. Click on Object

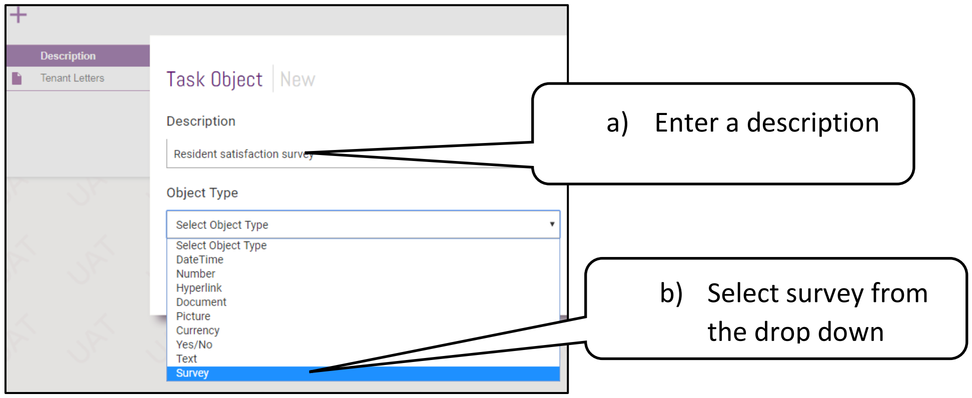


2. Click on the Plus button

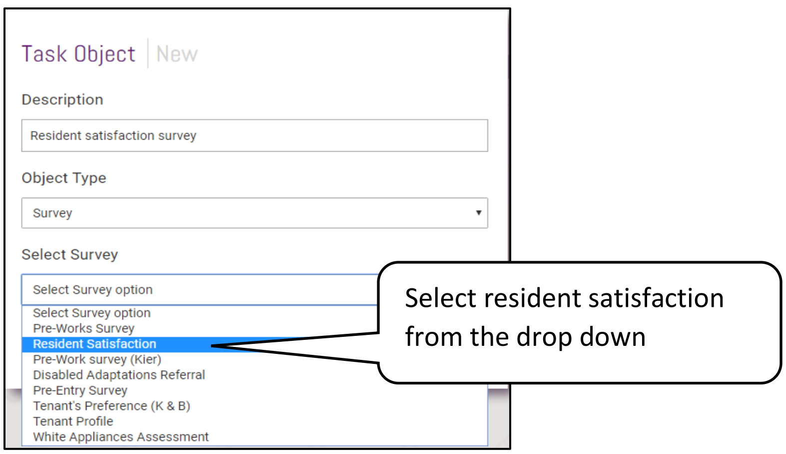


a. Enter a description. In this example I have used "resident satisfaction survey"

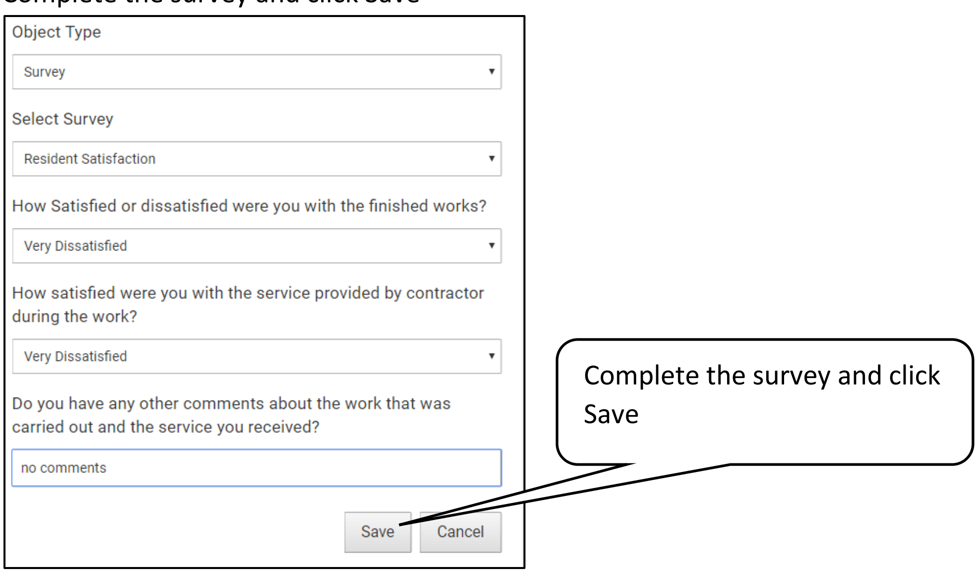
b. Select Survey from the drop down



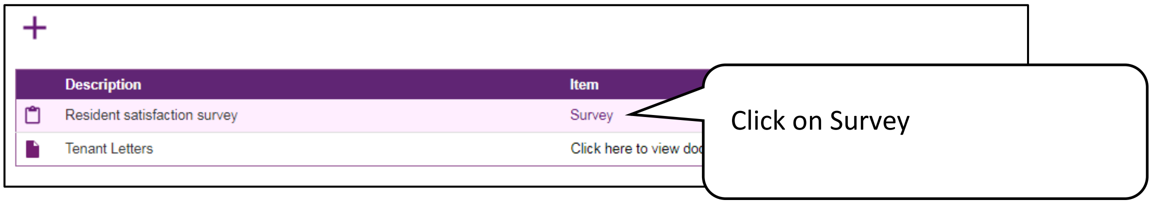
3. You can select any type of survey from the list, but in this example, I am going to select Resident Satisfaction.



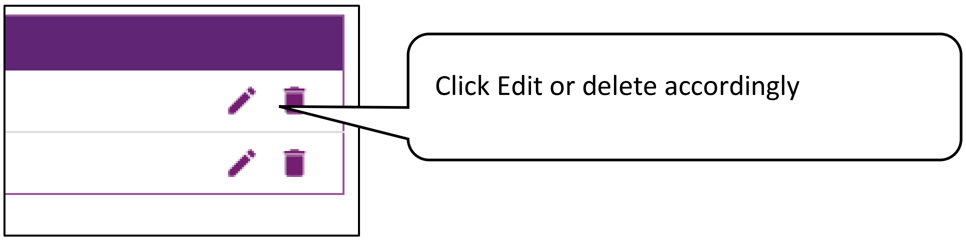
4. Complete the survey and click Save



5. The survey can be viewed by clicking on "Survey"



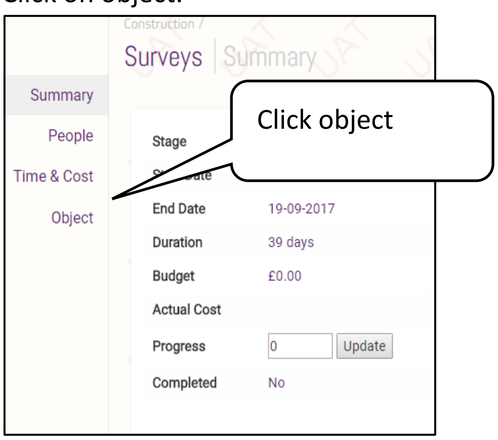
6. Surveys can be edited/deleted by clicking Edit or delete accordingly



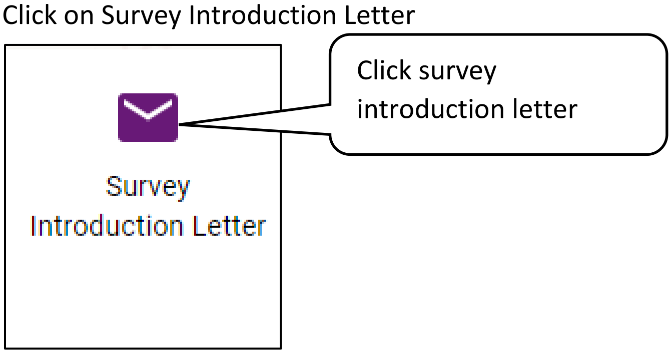
5.4.16 Survey Letters

Survey letters can be generated for sending out to tenants. It is accessed by navigating to Stages, Tasks & Sub-Tasks > Construction>Surveys. In this example I am going to generate a survey introduction letter but the process applies to all different types of letter.

1. Click on object.



2. Click on Survey Introduction Letter

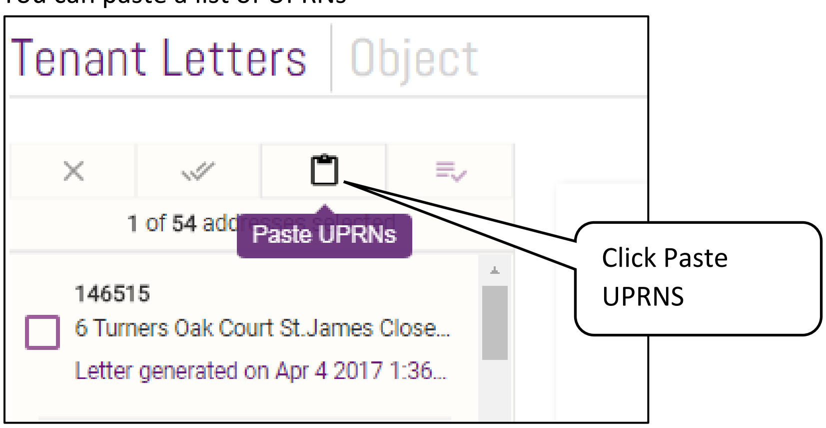


3. Select the properties you wish to include:

a) You can tick individual properties in the property list.

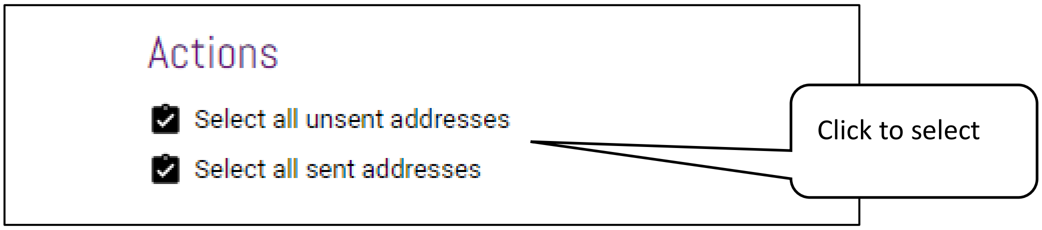
b) You can select all properties at once by clicking Select All

c) You can paste a list of UPRNs

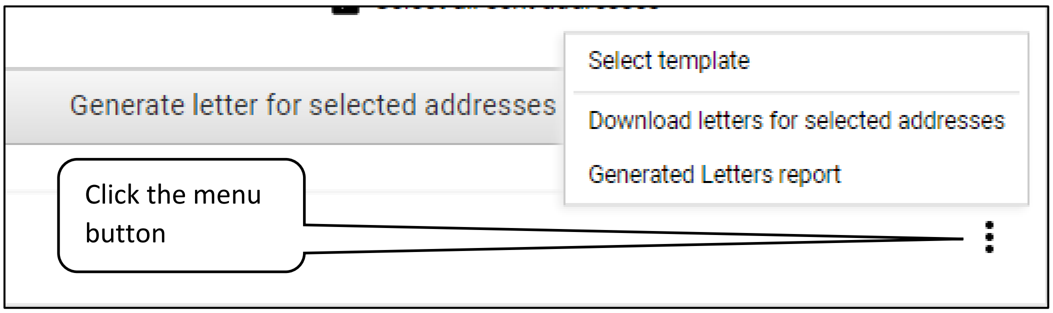


Paste the list off UPRNS in the box that pops up and click Select.

d) You can select all sent or unsent addresses



4. Select the template letter (if you have not already done so)
   a) Click the menu button, then click Select template

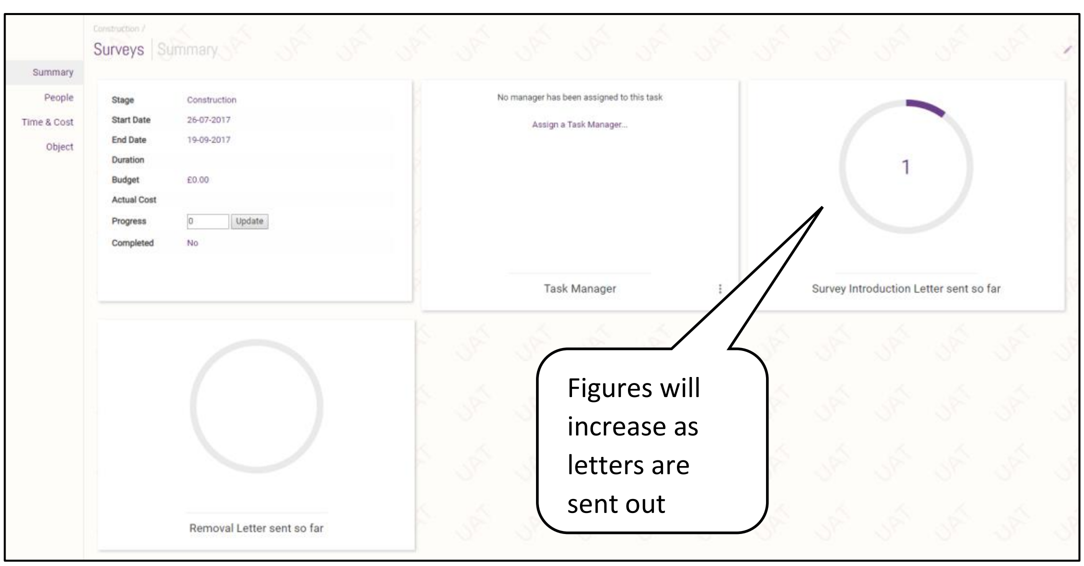


   b) Select the template document then click save.

5. You can now Click Generate letters for selected addresses. When the letters have been generated a zip-file containing the letters will automatically download

6. You can return at any point and download the letters for the selected properties
   a) Click the menu button
   b) Click download letters for the selected properties
   c) Click Yes at the prompt

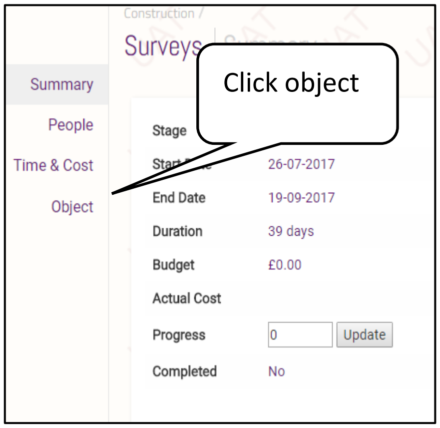
Back in the summary screen, the tiles will update when you send out certain letters. Below shows that 1 survey introduction letter has been sent so far and no removal letters.



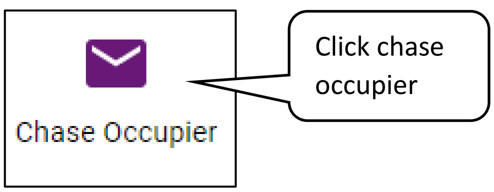
5.4.17 Chase Occupier

Chase letters can be generated for sending out to tenants. It is accessed by navigating to Stages, Tasks & Sub-Tasks > Construction>Surveys.

1. Click on Object

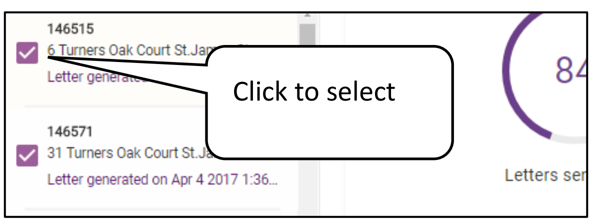


2. Click on Chase occupier



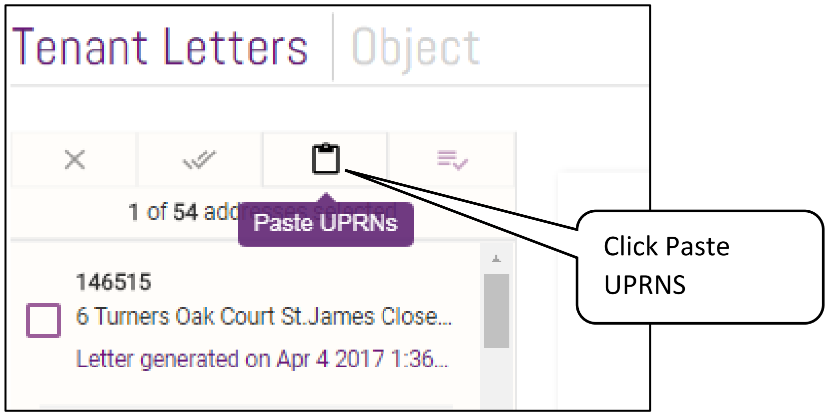
3. Select the properties you wish to include:

   a. You can tick individual properties in the property list.

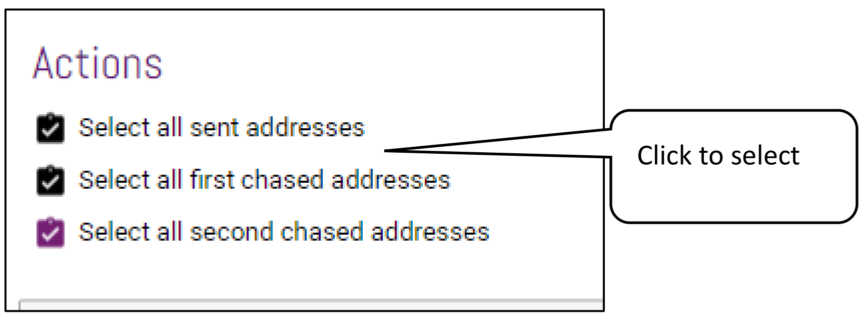


   b. You can select all properties at once by clicking Select All

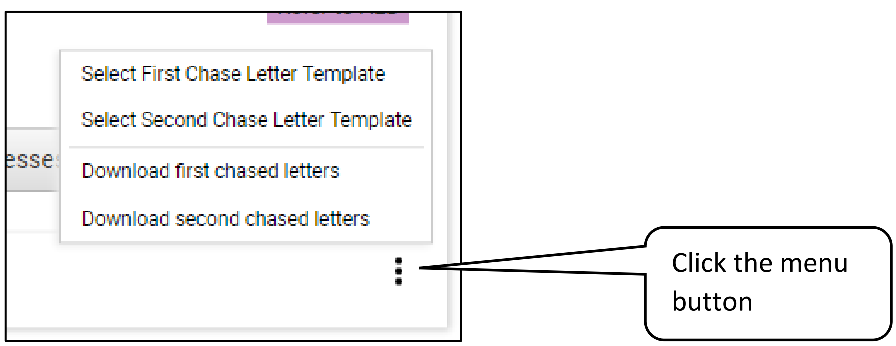
c. You can paste a list of UPRNs. Paste the list off UPRNS in the box that pops up and click Select.



d. You can select all sent addresses, all first chased addresses or all second chased addresses.



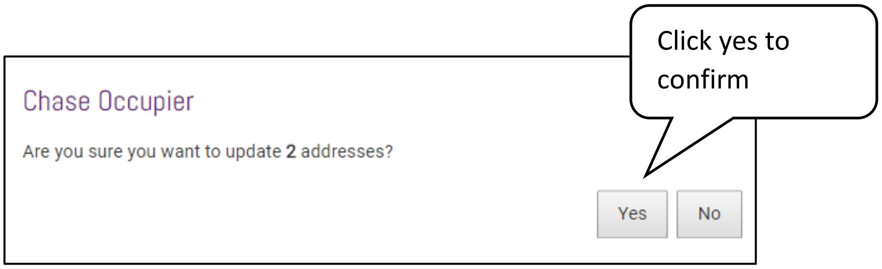
4. Select the template letter (if you have not already done so).
   a. Click the menu button, then click Select template



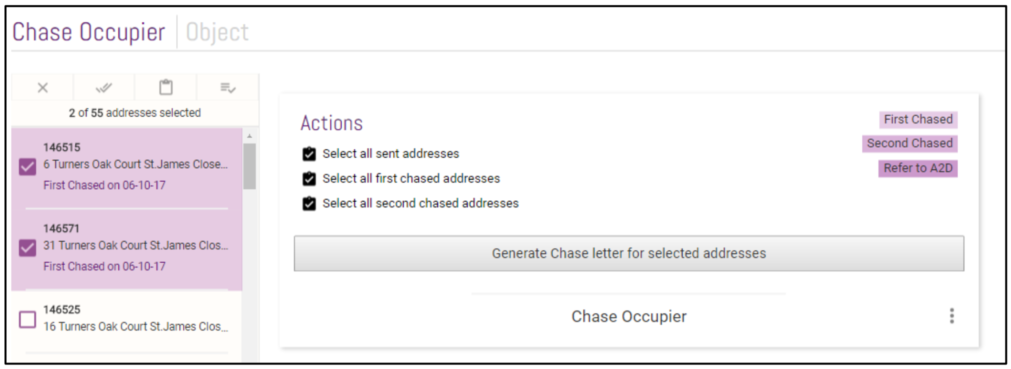
   b. Select the template document then click save.

5. You can now Click Generate letters for selected addresses.

   a. Click Yes to confirm. When the letters have been generated a zip-file containing the letters will automatically download



b. Once a letter has been generated, the addresses change colour according to the key.



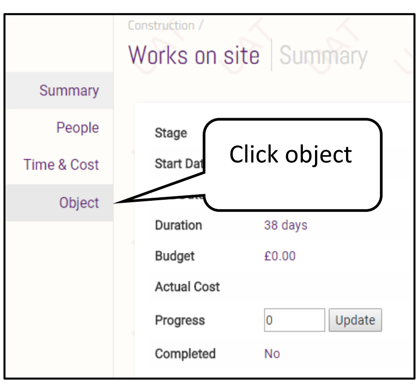
6. Repeat the process for second chase letters and for referring properties to A2D

7. You can return at any point and download the letters for the selected properties
   a. Click the menu button
   b. Click download first chased or second chased letters

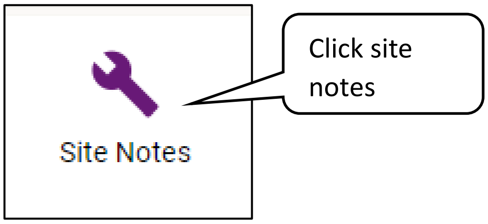
5.4.18 Add site notes

Site notes can be added to. It is accessed by navigating to Stages, Tasks & Sub-Tasks > Construction>Works on site.

1. Click on Object



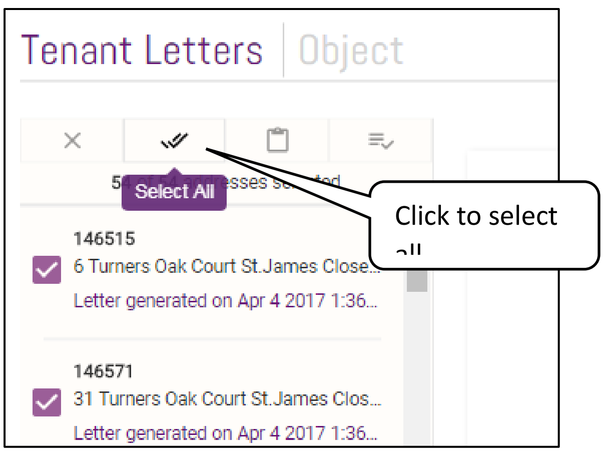
2. Click Site notes



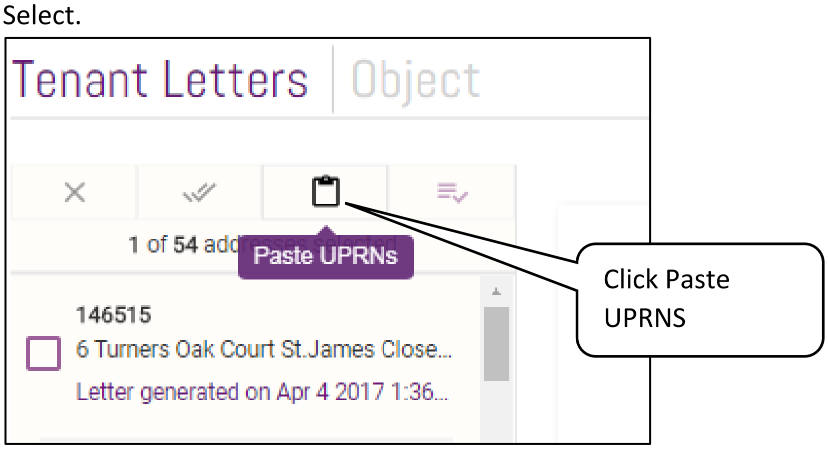
3. Select the properties you wish to include:

   a. You can tick individual properties in the property list.

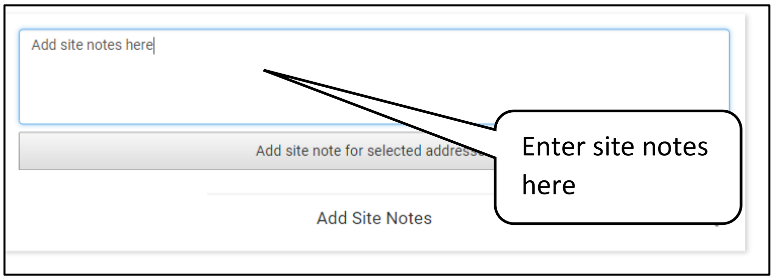
   b. You can select all properties at once by clicking Select All



   c. You can paste a list of UPRNs. Paste the list off UPRNS in the box that pops up and click Select.

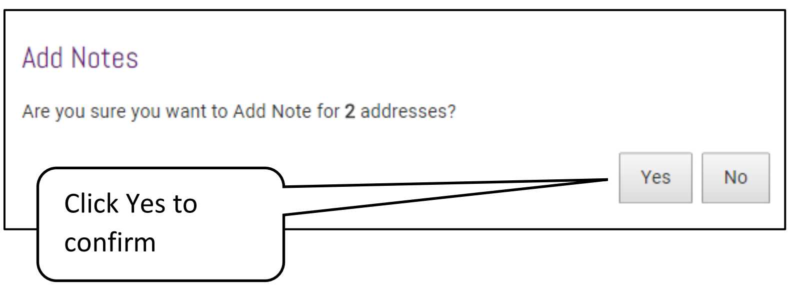


4. Enter the required site notes



5. You can now click Add site note for selected addresses

a. Click Yes to confirm

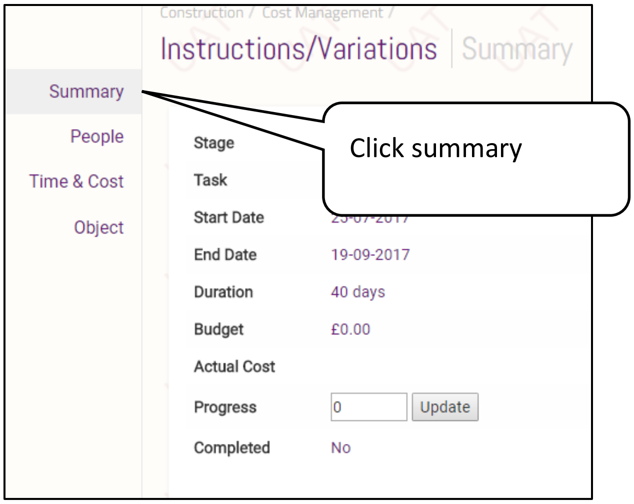


6. Clicking on site notes report will open a new window where the notes for each property can be printed or exported to excel.

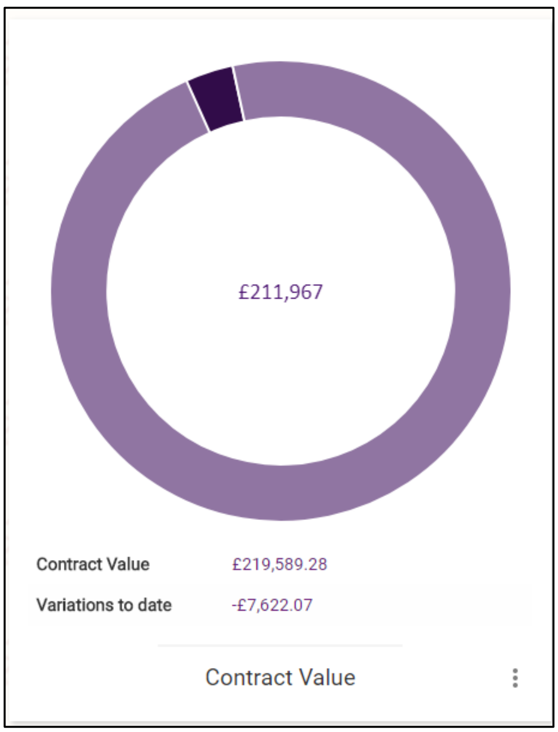
5.4.19 Contract Value

Contract value is a widget that shows the current contract (total) value for the project. It can be accessed by navigating to Stages, Tasks & Sub-Tasks > Construction>Cost Management>Instructions /Variations.

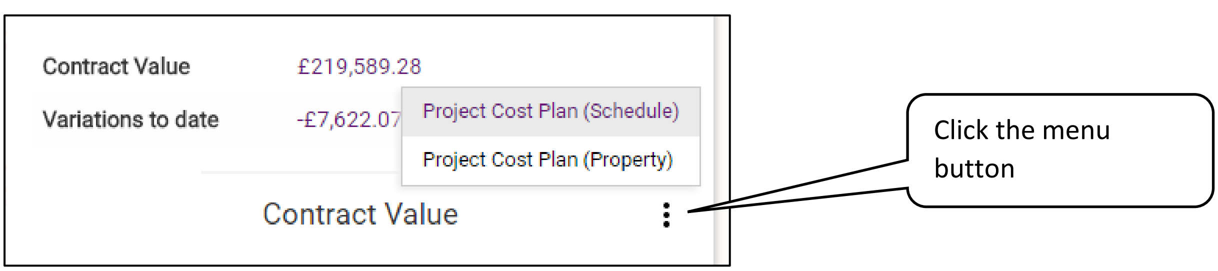
1. Click Summary



2. The widget shows the current contract value

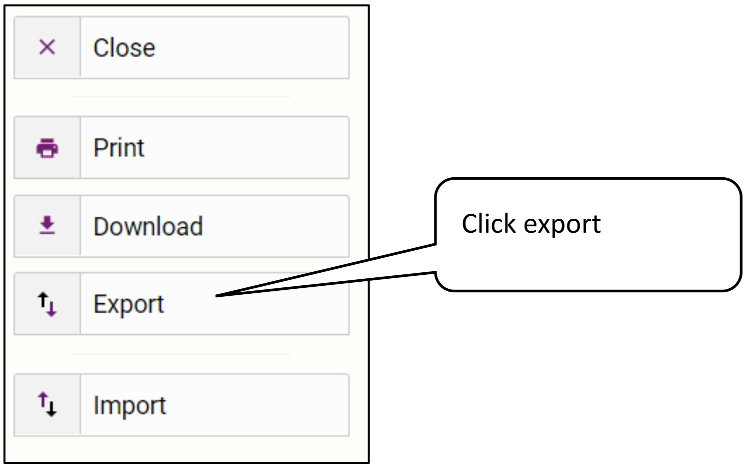


Clicking on the menu button allows you to go into the Project Cost Plan (Schedule) or Project Cost Plan (Property)



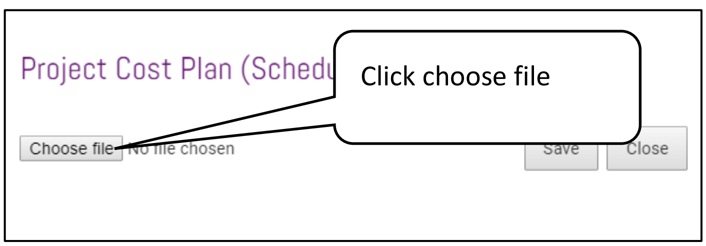
3. Selecting Project Cost Plan (Schedule) will open up the Project Cost Plan (Schedule) in a new window where you can print or download the Project Cost Plan (Schedule) and also update the Project Cost Plan (Schedule) from a spread sheet

    a. Click Export. The project cost plan will now download in an excel spread sheet

    Make the required changes to the spread sheet and save it to your computer.

    b. Click on Import
    c. Click on Choose File

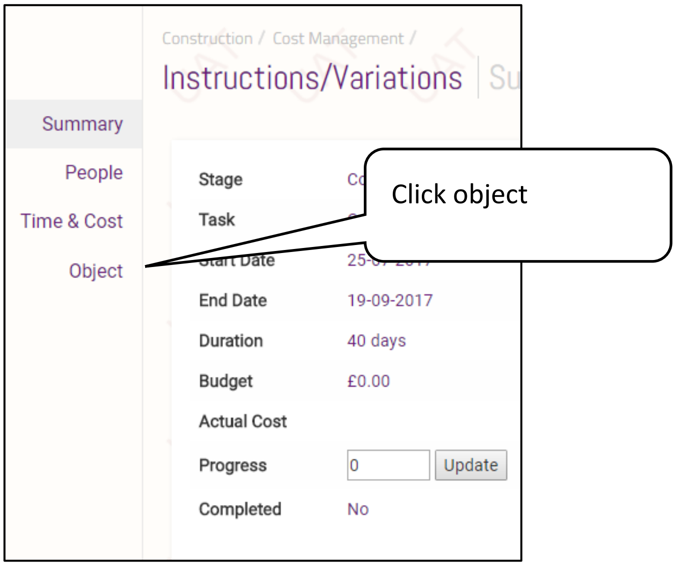
    d. Select the spread sheet that you have saved previously and click Save.

4. Selecting Project Cost Plan (Property) will open up the Project Cost Plan (Property) in a new window where you can print or download the Project Cost Plan (Property) into an excel spread sheet.

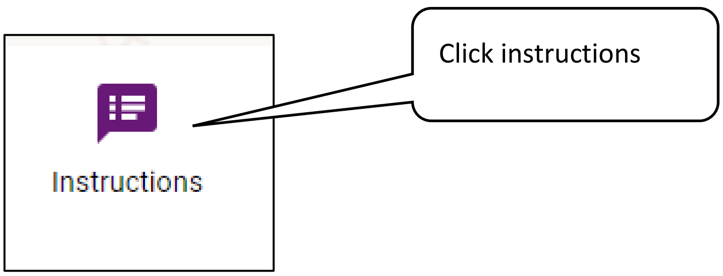
5.4.20 Instructions

Instructions are a list of instructions and payment direction where applicable. They are accessed by navigating to Stages, Tasks & Sub-Tasks > Construction>Cost Management>Instructions/Variations.

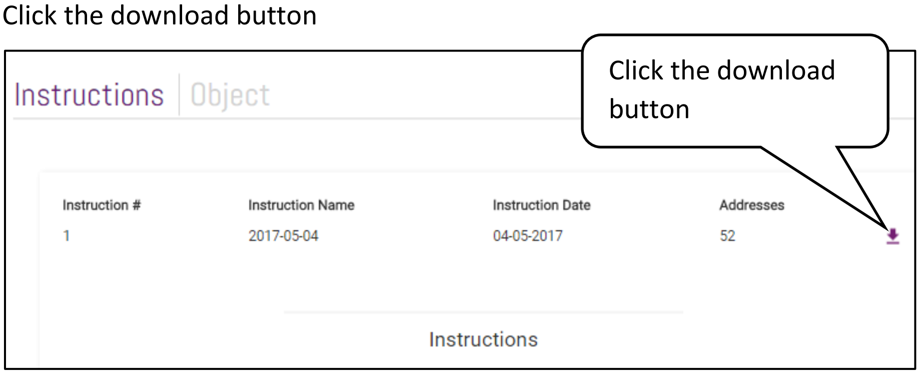
1. Click on object



2. Click instructions



3. Click the download button

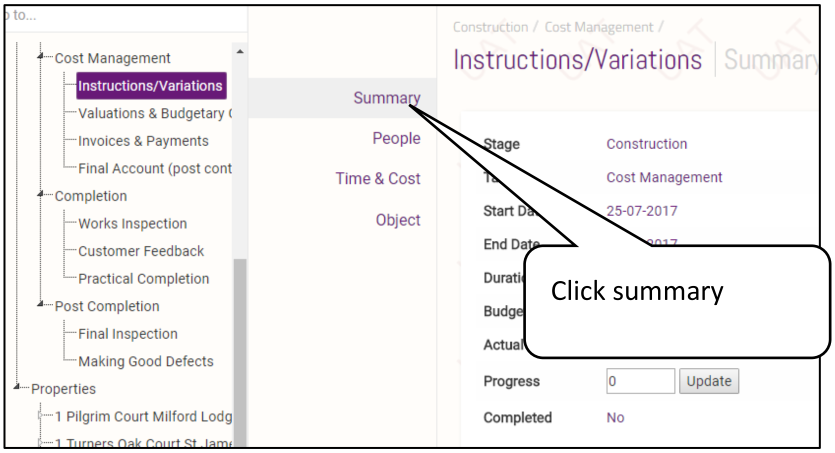


4. The list of instructions will now download in Word format.

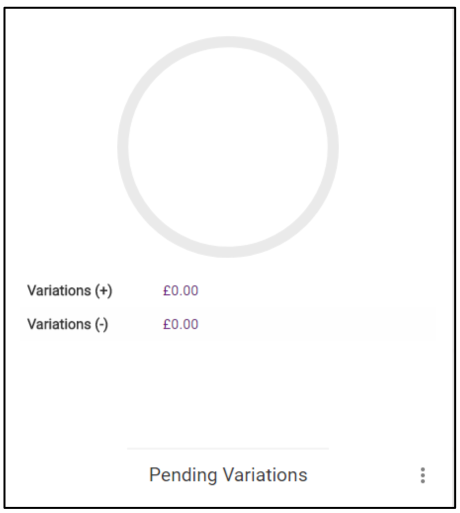
5.4.21 Pending Variations

Pending Variations are accessed by navigating to Stages, Tasks & Sub-Tasks > Construction>Cost Management>Instructions /Variations.

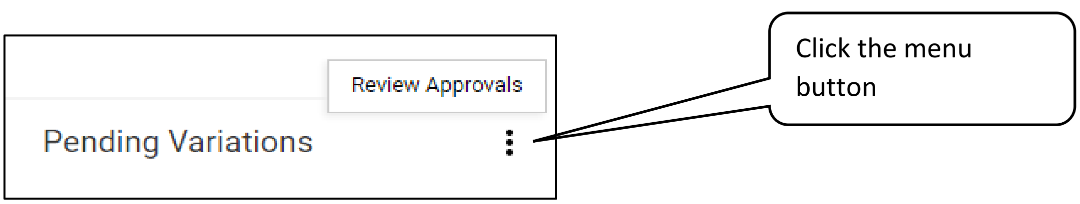
1. Click on Summary



2. The widget will display any pending variations. In this example there are no variations pending.



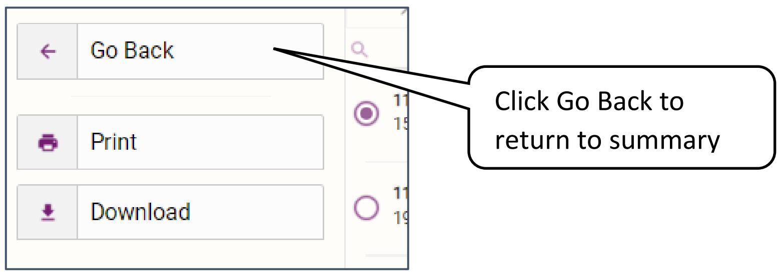
3. Click the menu button and click review approvals. This will open the variation approval screen.



4. Select a property from the list on the left. A cost summary is shown at the top of the screen showing budget, current, pending and declined costs with the approvals listed below for the address selected.
   a. Make the required changes.
   b. Click update.

5. Click Yes to confirm

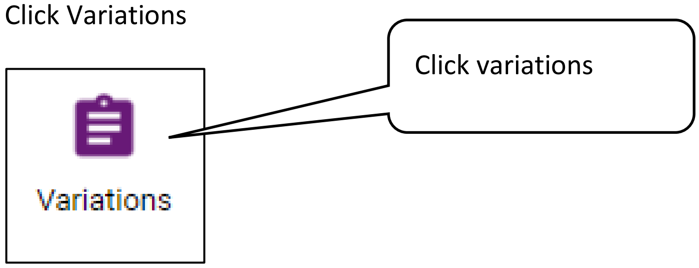
6. You have the option to print or download the approvals listed, or just click Go back to return to the summary.



7. Once you are certain there are no more variations needed for a certain property, you can finalise the variations.

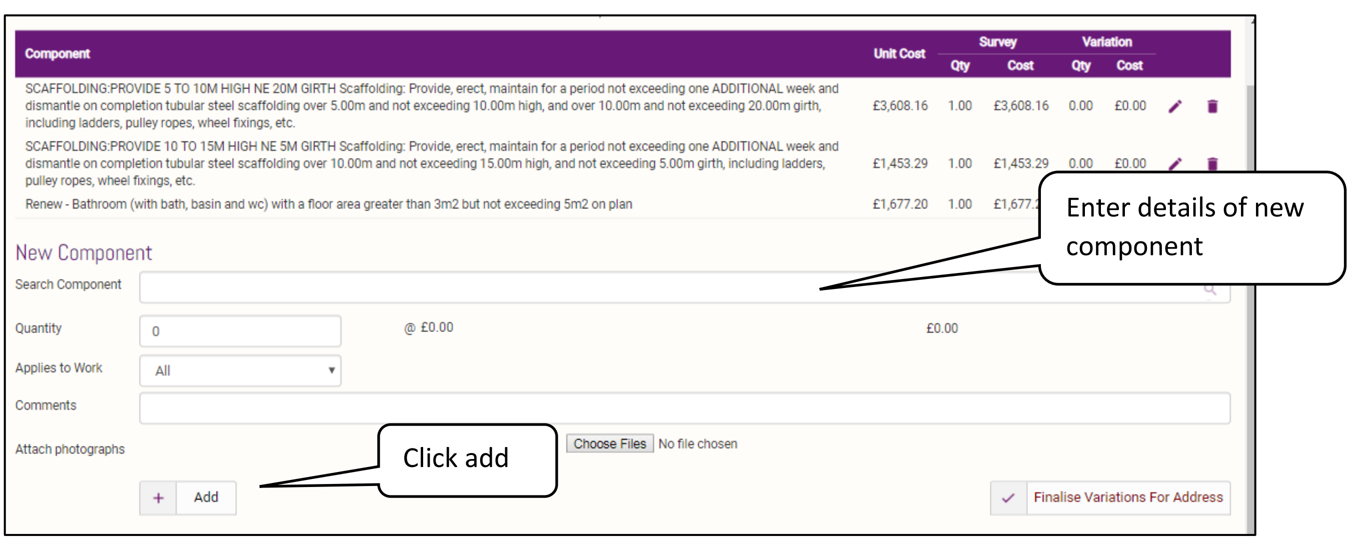
a. From Instructions/Variations go to Object

b. Click Variations

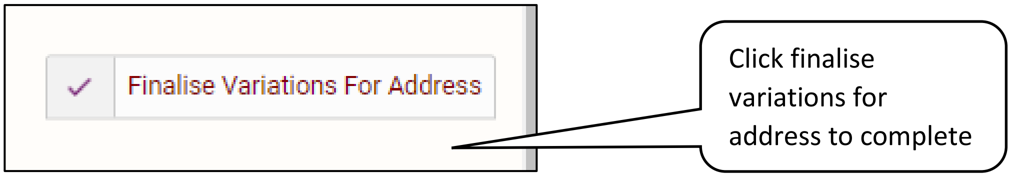


c. Select an address

d. You are now shown the full list of approved variations for the property and have the option to add another if needed.



e. Once happy with all variations for the address, click 'Finalise Variations For Address'.



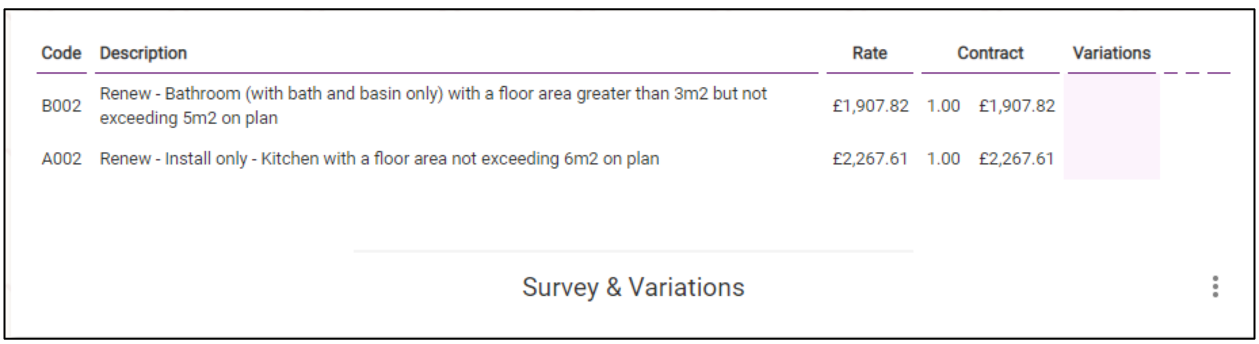
NOTE This cannot be undone. Once you have finalised, no further variations can be added to the selected address.

8. There is a report you can run for each property which shows a breakdown of surveys and variations, along with the property details. The initial attribute information is pulled from Lifespan Housing and the rest is populated from the stages within projects.

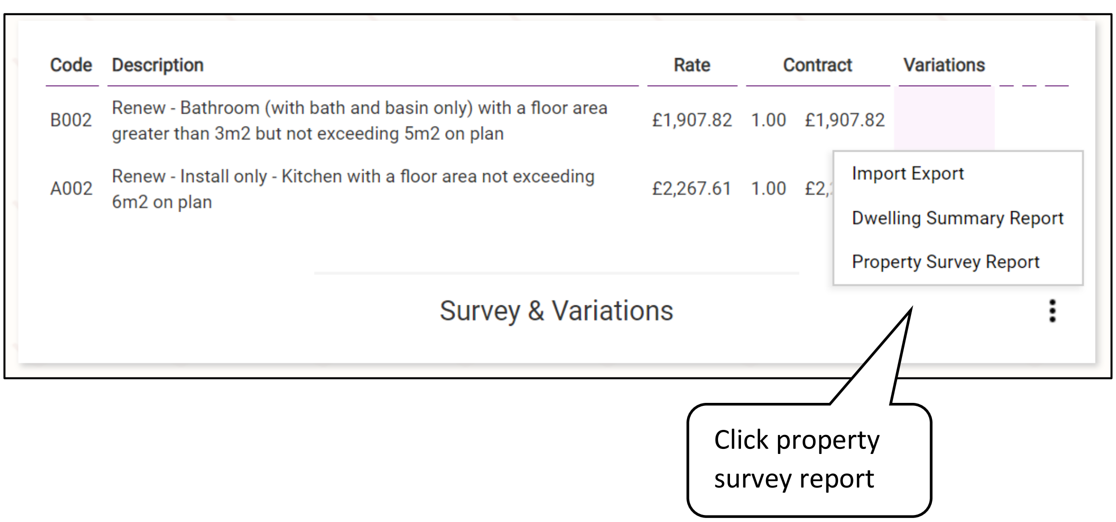
a. Go to Stages, Tasks & Sub-Tasks>Properties>Cost Management>Variations/Instructions

b. Click on Summary

c. Scroll to the bottom to view the tile 'Survey & Variations'. This shows all variations relating to the selected property, and whether or not these have been approved.



d. Click Property Survey Report to download the report, this will generate a word document including all the information required for the selected property.

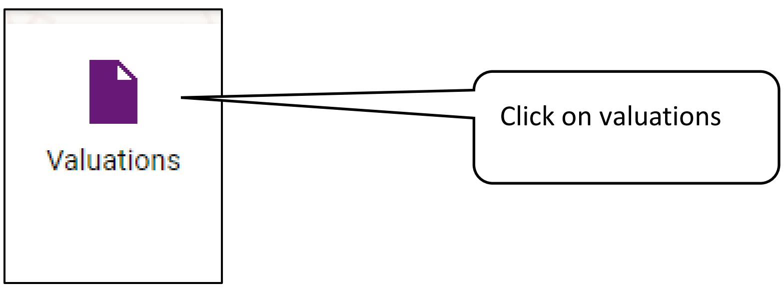


5.4.22 Valuations

Valuations are accessed by navigating to Stages, Tasks & Sub-Tasks > Construction>Cost Management> Valuations & Budgetary Control.

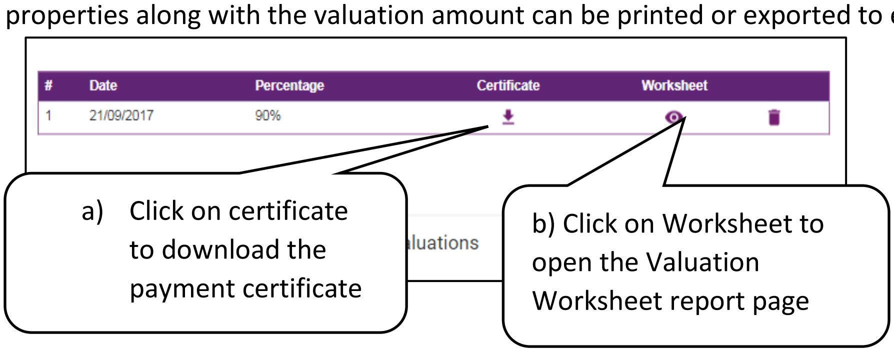
1. Click on Object

2. Click on Valuations



3. The list of valuations is now shown
    a. Click download to download the payment certificate.

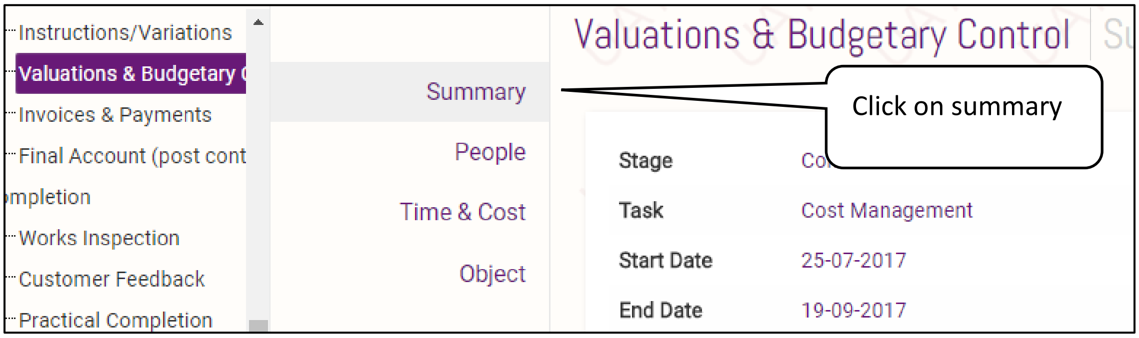
    b. Click Worksheet to open the Valuation Worksheet report page. Here the list of properties along with the valuation amount can be printed or exported to excel.



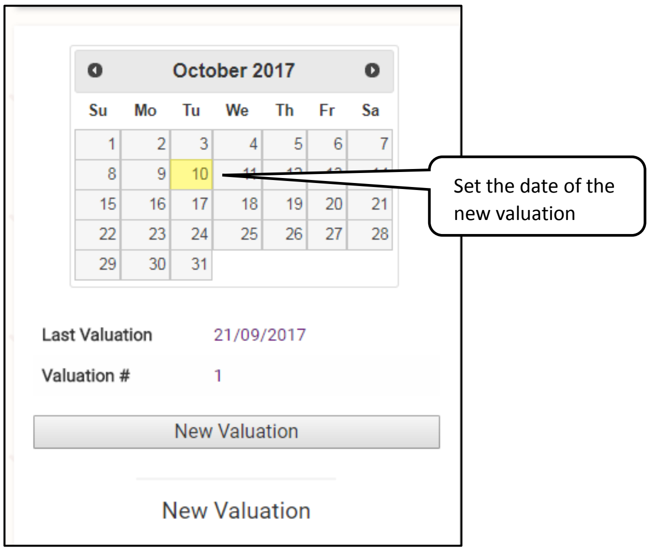
5.4.23 New Valuations

New Valuations are added by navigating to Stages, Tasks & Sub-Tasks > Construction>Cost Management> Valuations & Budgetary Control.

1. Click on Summary

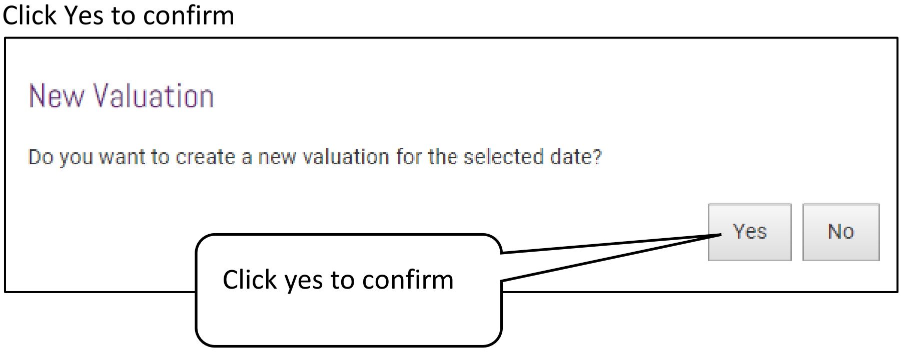


2. Use calendar to set the date of the new valuation.



3. Click New Valuation

4. Click Yes to confirm



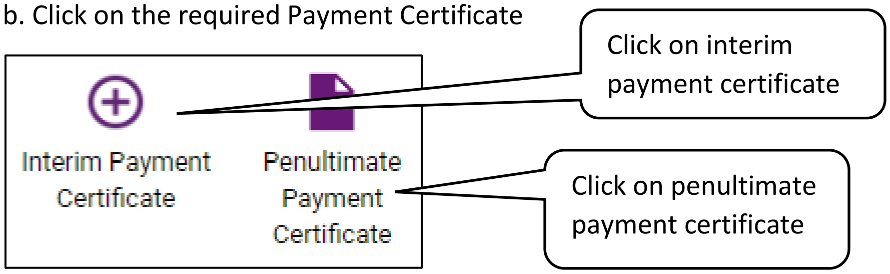
5.4.24 Payment Certificates

There are three different payment certificate options to reflect the different stages of the project – Interim, Penultimate and Final.

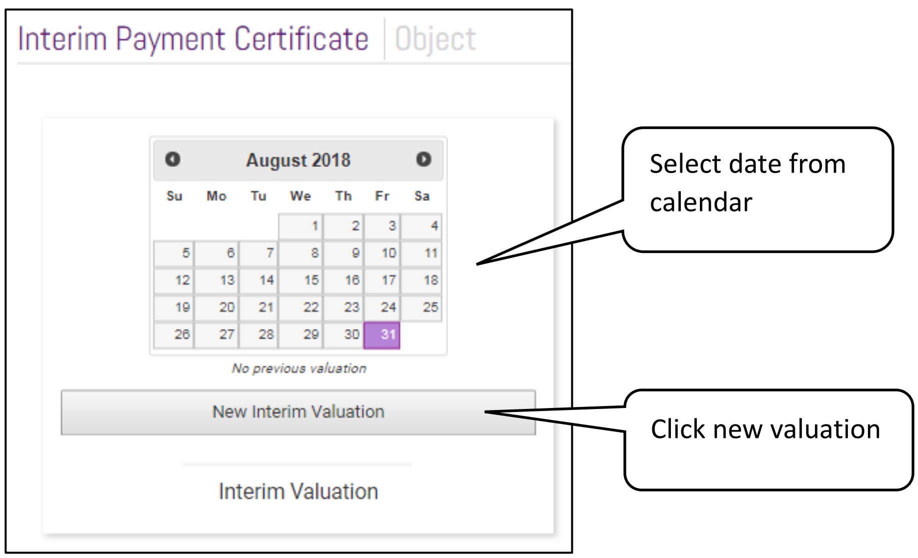
1. Interim and Penultimate payment certificates are accessed by navigating to Tasks & Sub-Tasks > Construction>Cost Management> Valuations & Budgetary Control.

a. Click on Object

b. Click on the required Payment Certificate

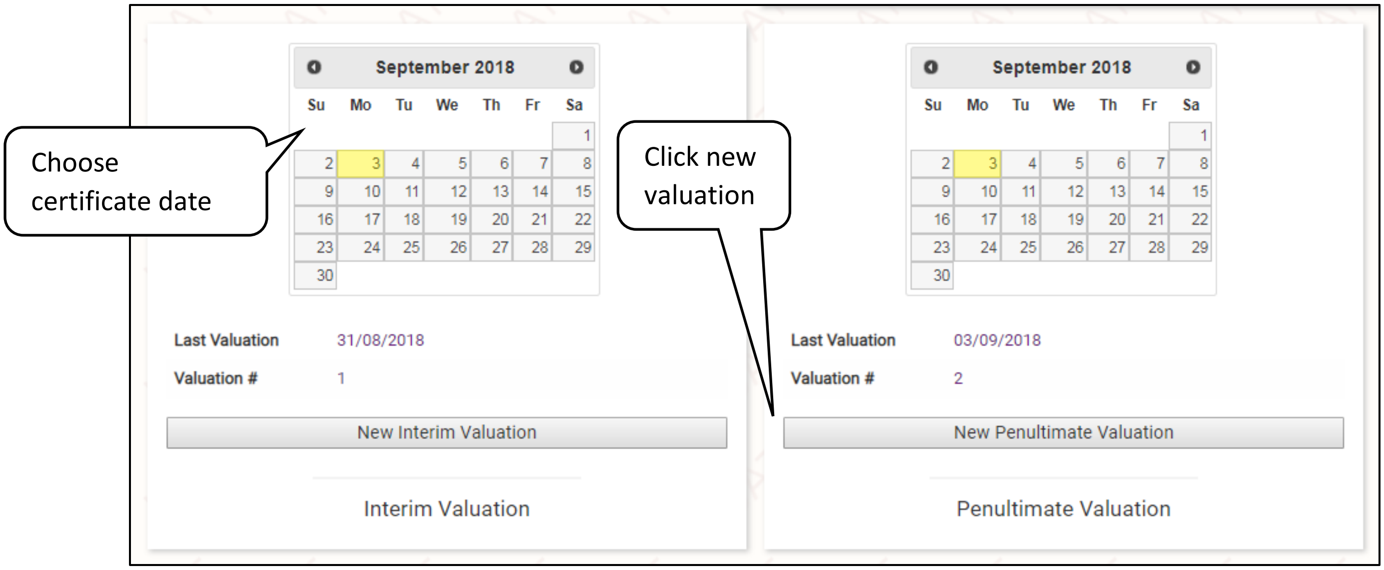


c. Select from the calendar the date you want to appear on the certificate and click ‘New Valuation’

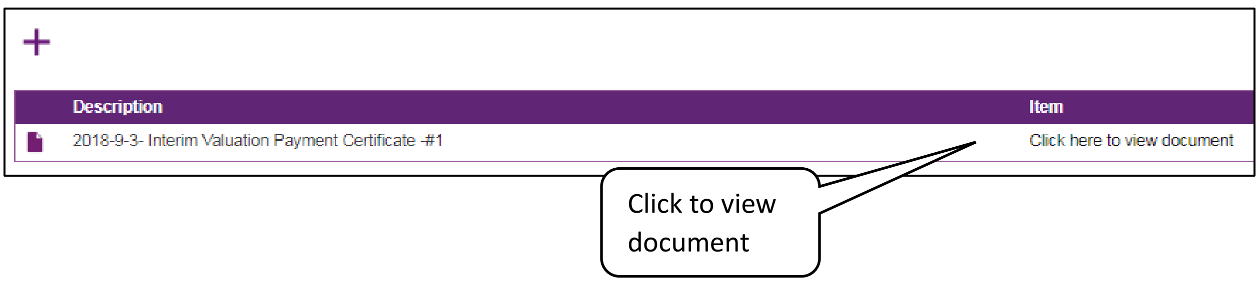


d. Click yes to ‘Do you want to create a new valuation for the selected date?’

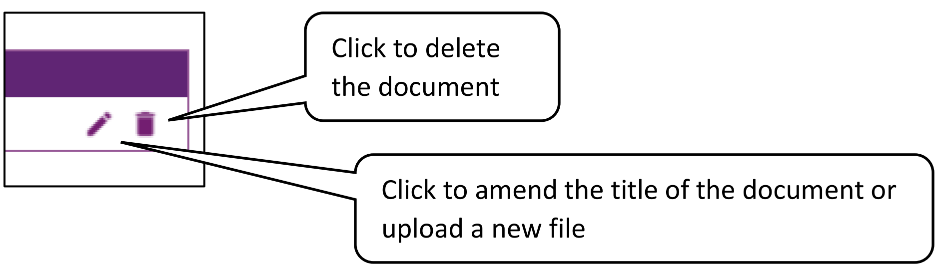
e. You can also create new valuations from the summary screen. Scroll to the bottom and select the date before clicking new valuation for the appropriate payment certificate.



f. To view the certificate, go to Object and click to view document – this will download a pdf certificate

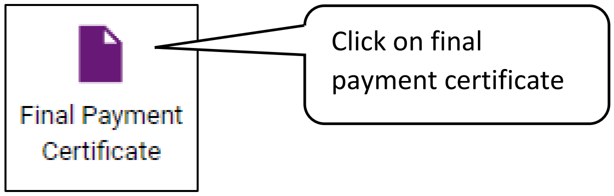


g. You can edit or delete the document by clicking on the appropriate icon on the right of the listing

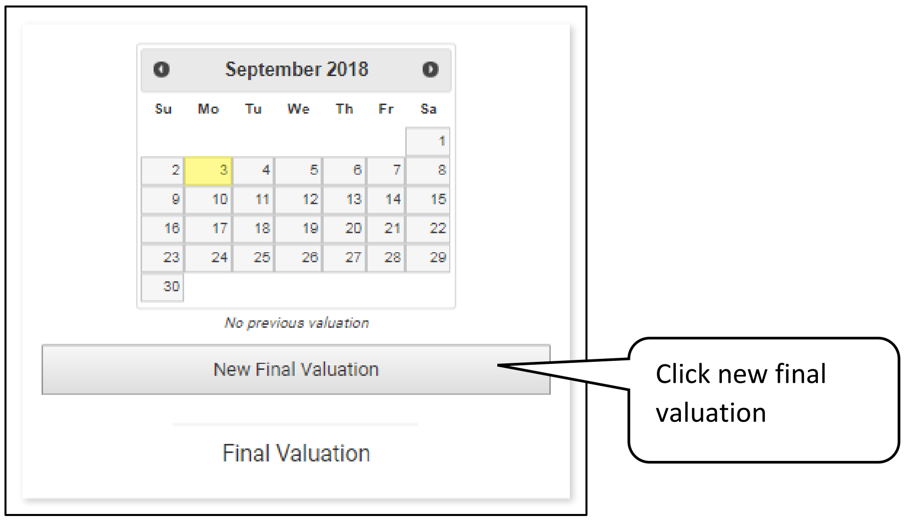


2. The final payment certificate is accessed by navigating to Tasks & Sub-Tasks > Construction>Cost Management>Final Account (Post Contract)

    a. Click on Object
    b. Click on Final Payment Certificate



c. Select from the calendar the date you want to appear on the certificate and click 'New Final Valuation'



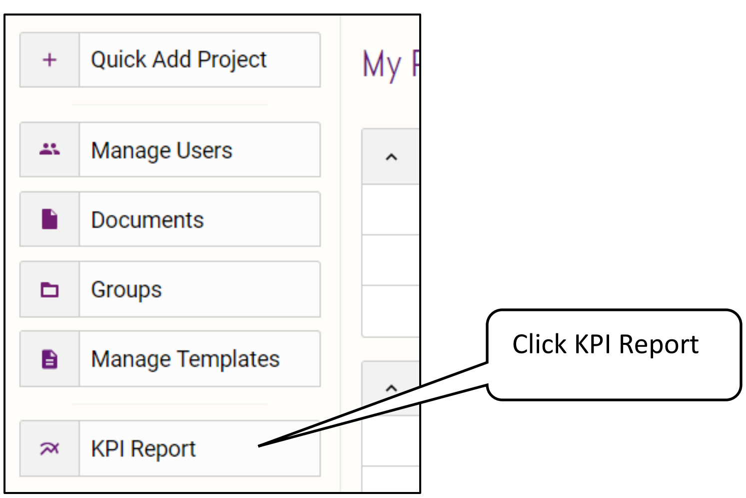
d. You can also complete this through the final valuation tile on the summary screen. Your certificate is available to view from the objects page as with previous certificates and you have the option to edit or delete the certificate by clicking on the relevant icon on the right

5.4.25 KPIs

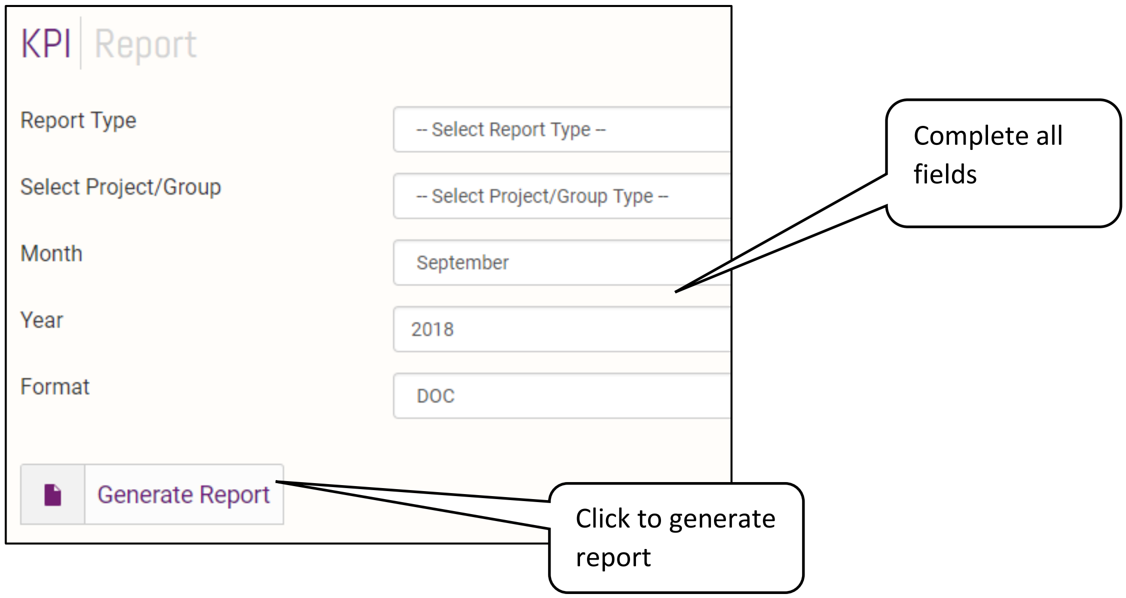
Within each project there are various key points and stages which are tracked as work evolves and the data taken is stored as KPIs.

1. Go to 'My Projects'

2. Click 'KPI Report'

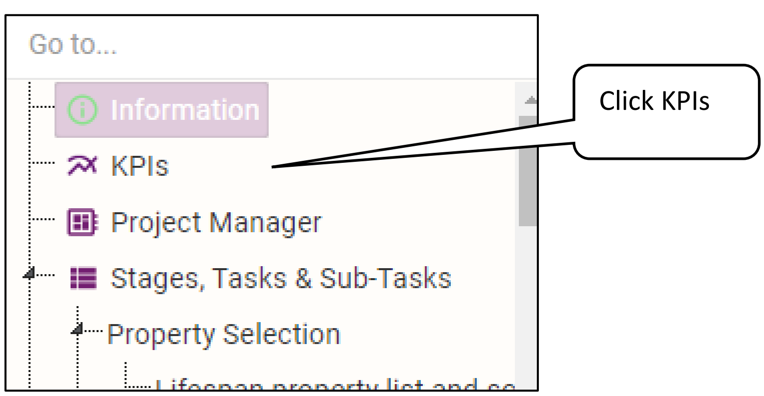


3. You are now given a number of fields which should help to narrow down your report criteria. Fill out as required and click 'Generate Report'.

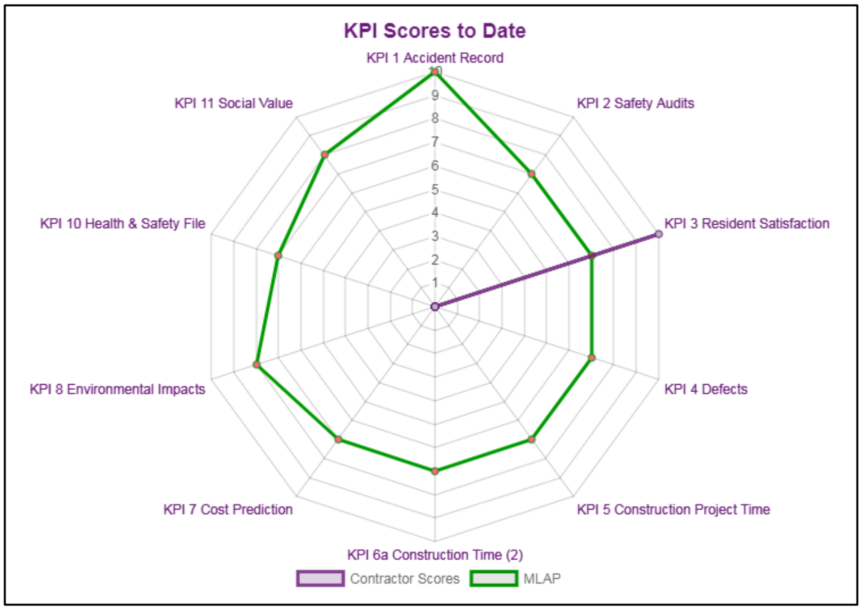


   a. Report type – Choose from either project or group
   b. Select Project/Group – Choose from the list of projects or groups depending on your previous answer
   c. Month – Up to and including the month selected
   d. Year – Up to and including the year selected
   e. Format – Choose to create your report in either DOC or PDF format

4. You can also view the KPI scores to date at a glance for any specific project
   a. Go to 'My Projects' and select the project you want to view
   b. From the task bar, click on KPIs



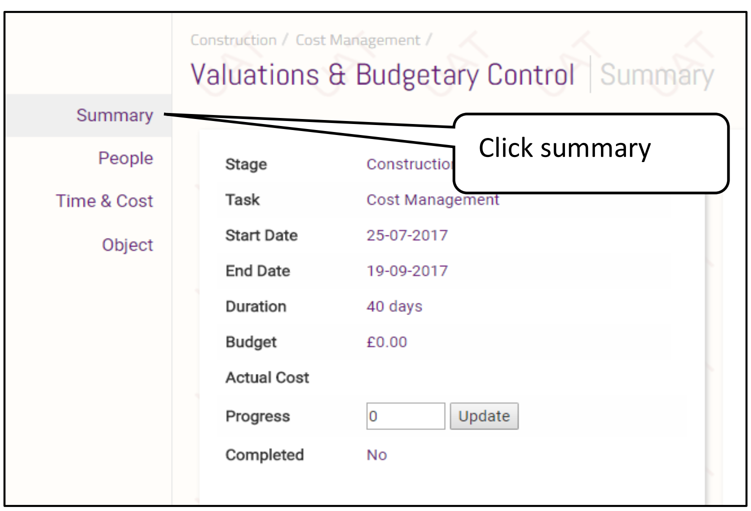
c. You will now see the graph of KPI Scores to Date. As shown in the example below it gives an overview of the selected project, showing the contractor scores alongside the MLAP scores. This is updated automatically as more information is included within the different stages of the project.



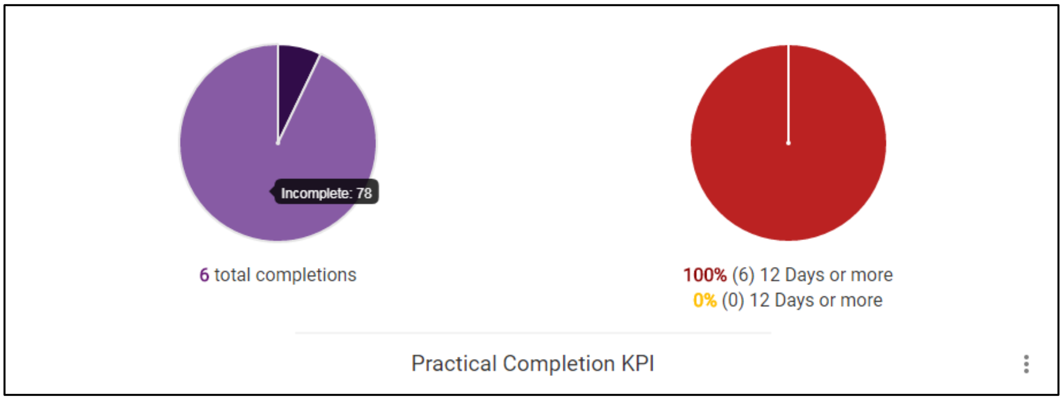
5.4.26 Practical Completion KPI

The practical Completion KPI widget is accessed by navigating to Stages, Tasks & Sub-Tasks > Construction>Cost Management> Valuations & Budgetary Control.

1. Click on Summary

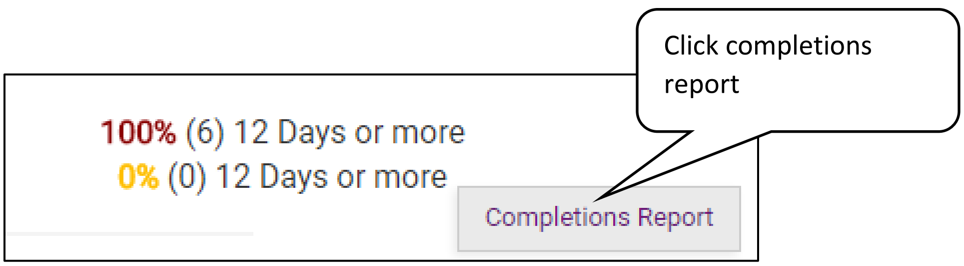


2. The widget displays the KPIs in graphical format.



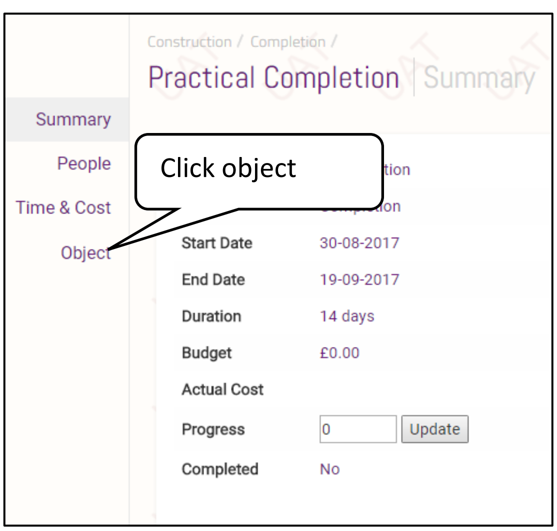
3. A completions report is available to download in excel format.
   a) Click on the menu button.

   b) Click on Completions report. The report will open up in a new tab where it can be printed or downloaded to excel.



5.4.27 Practical Completions

Practical Completion Certificates can be viewed by navigating to Stages, Tasks & Sub-Tasks > Construction>Practical Completion>Click on Object

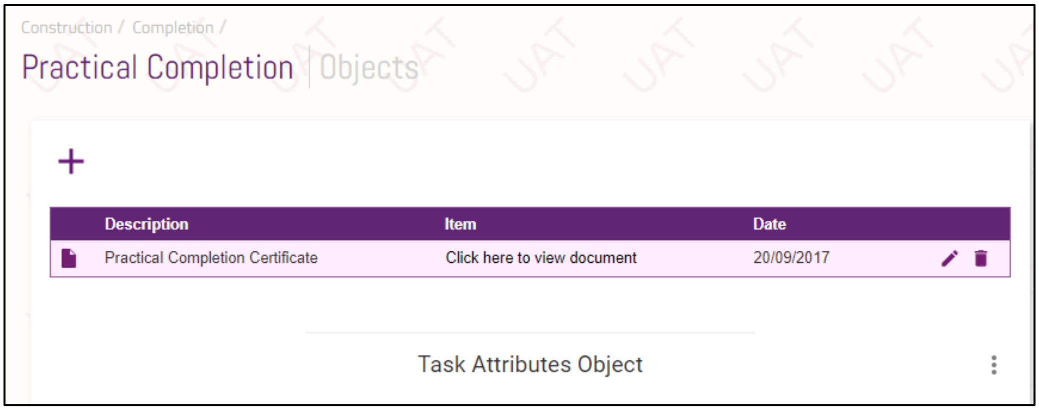


1. The list of practical completions is now shown

   a) Click “Click here to view document” to download the certificate in Word format.

   b) Click Edit to edit the document. Make the required changes and click Save

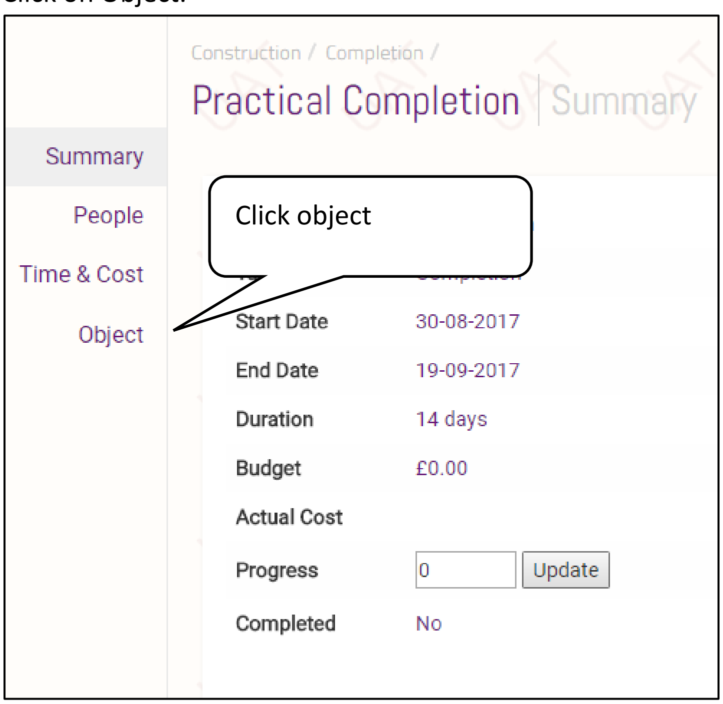
   c) Click Delete to delete the document.



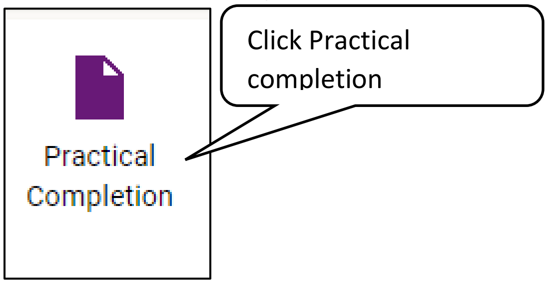
5.4.28 New Practical Completions

New Practical Completion Certificates are issued by navigating to Stages, Tasks & Sub-Tasks > Construction>Practical Completion>

1. Click on Object.



2. Click on Practical Completion

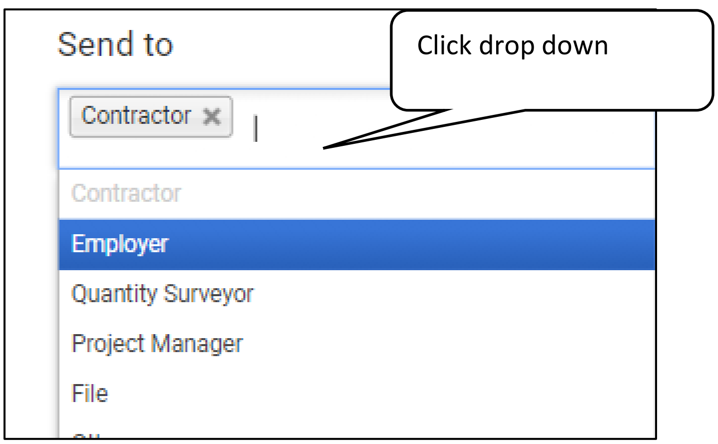


3. Select the addresses you wish to include on the practical completion certificate.

4. Select the completion date. The current date is the default however this can be changed using the calendar tool.

5. Enter the serial number.

6. Click on the drop down and select who you wish to issue the completion certificate to.

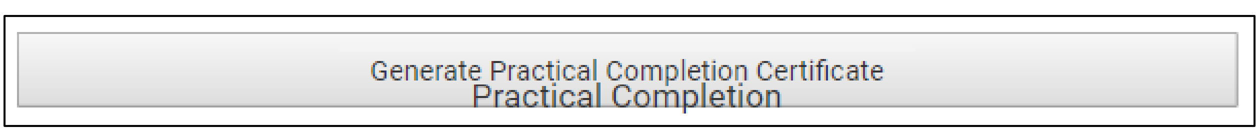


7. Select the expiration date. The default is one year from the current date however this can be changed using the calendar tool.

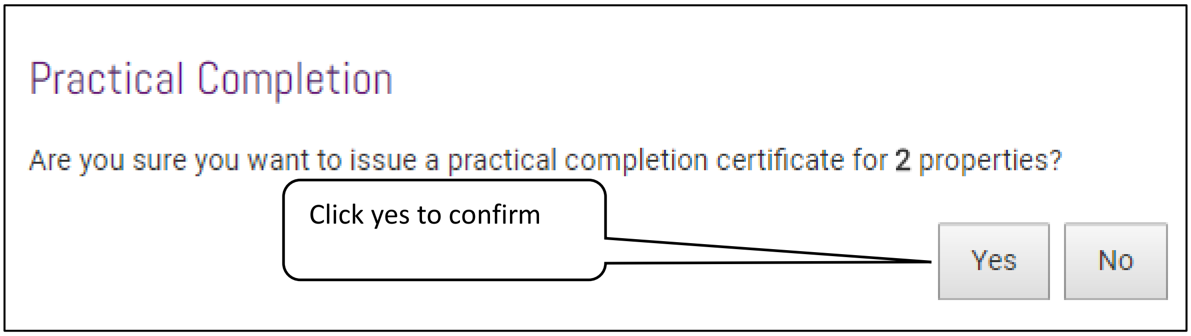
8. Enter the reference number. The default is taken from the project reference number.

9. Enter any notes if required.

10. Click Generate Practical Completion Certificate.



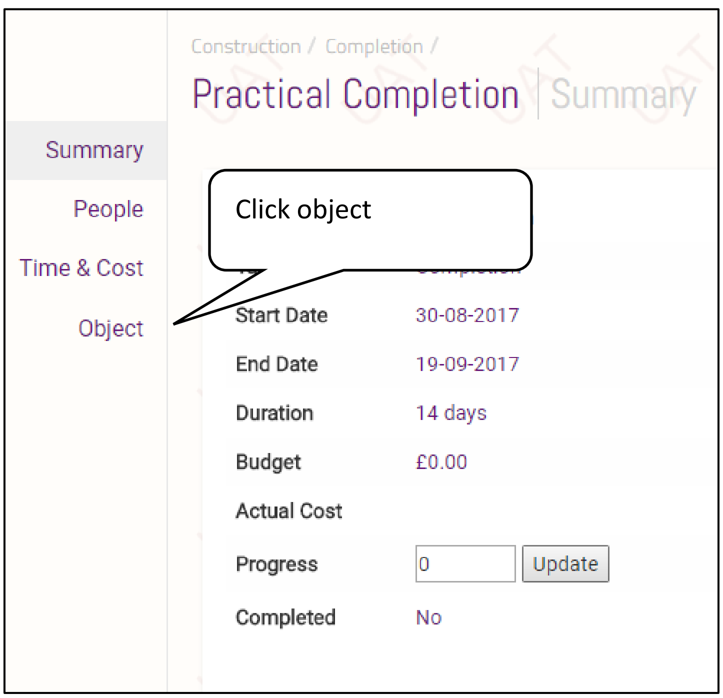
11. Click Yes to confirm. The practical completion certificate will download in Word format.



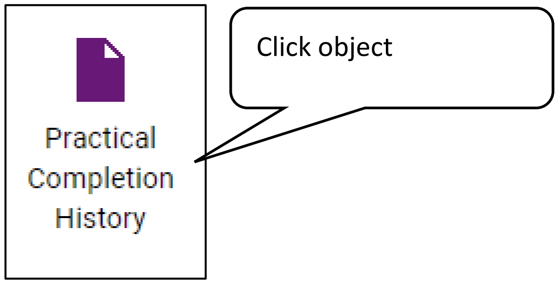
5.4.29 Practical Completion History

The Practical Completion history can be viewed by navigating to Stages, Tasks & Sub-Tasks > Construction>Practical Completion>

1. Click on Object.



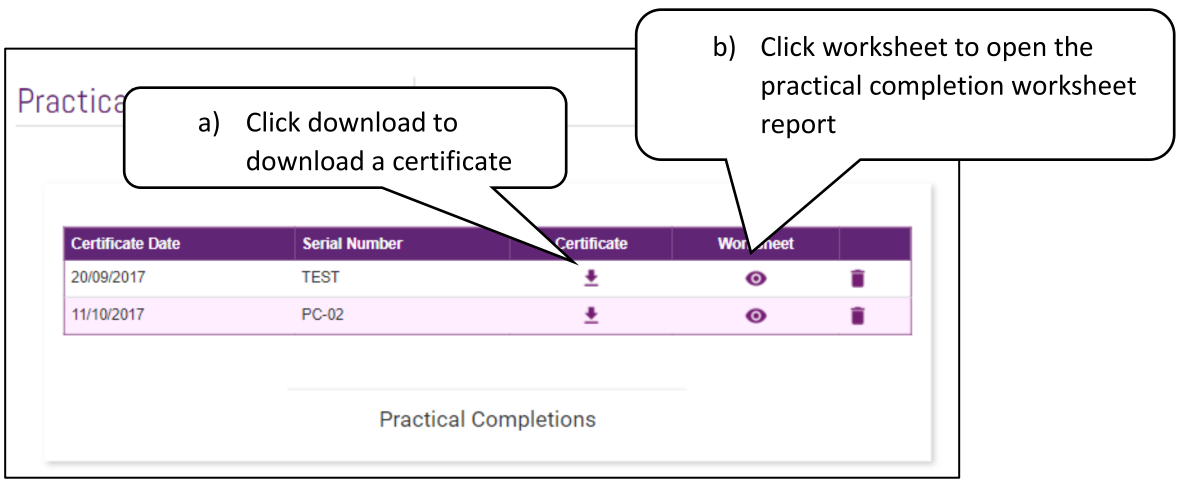
2. Click on Practical Completion History



3. The list of practical completions is now shown.

    a) Click download to download a certificate

    b) Click worksheet to open the practical completion worksheet report in a new window.



5.4.30 Snagging

The final stage of works completion is snagging. This gives the project manager a view of any issues to be addressed before the project can be completed.

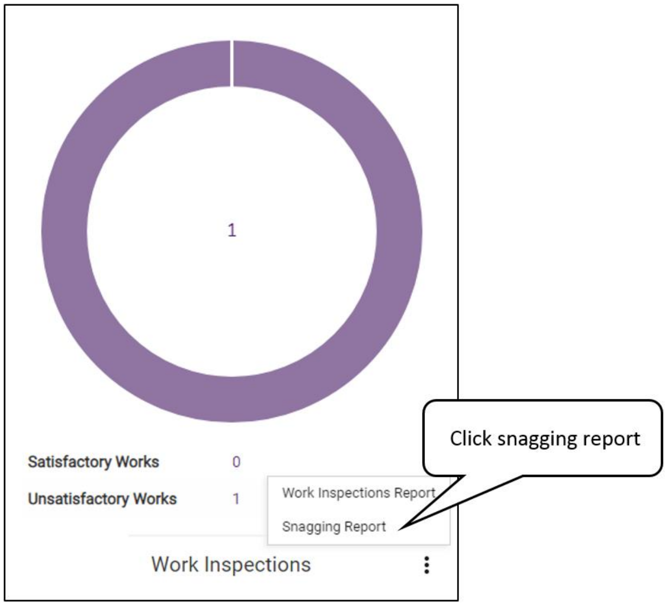
Once the final 'Stage 4' survey within Lifespan Projects Mobile has been carried out on site and the data uploaded to projects, the information is shown in the 'Work Inspections' tile.

NOTE The 'Work Inspections' tile is linked up with Lifespan Projects Mobile and will only become active if using projects and mobile in conjunction with each other.

1. Go to 'Project Manager' and scroll down to the work inspections tile. This will show you at a glance how many works have been surveyed as complete and gives you a breakdown of the satisfactory and unsatisfactory works.

Within the tile you can open the work inspection report and snagging report for more details. For a listing of all completed works, view the work inspections report. However, to review just the unsatisfactory works, you will need the snagging report.

2. Hover over the three dots and click ‘Snagging Report’.



A new window will open providing details of the unsatisfactory works along with any accompanying notes. This provides the project manager an overview of issues for each property so snagging works can be raised and the project completed.

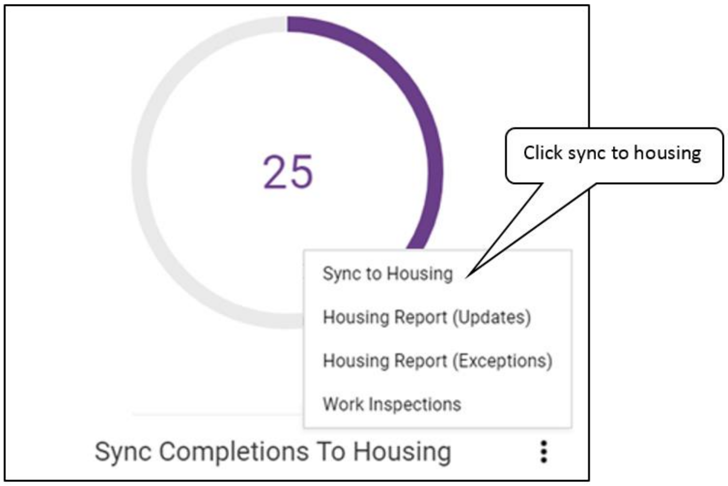
Snagging | Report

UPRN	Component Code	Component	Work Completed	Work Was Satisfactory	Comments	Reviewed On	Adjusted Quantity
146525	A008	Install only - Kitchen with a floor area exceeding 14m2	No	N/A	Not complete	08-02-2019	0.00
146525	A008	Install only - Kitchen with a floor area exceeding 14m2	Yes	No	Poor finish, cupboards damaged during install.	08-02-2019	

5.4.31 Sync Completions to Housing

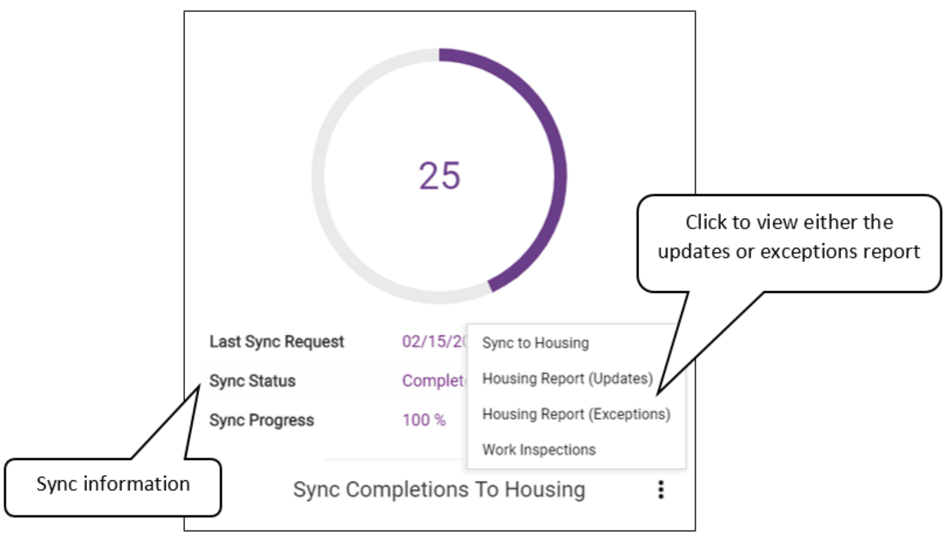
Once an entire project is complete you can sync the information back to housing which will update the work completions in property attributes for each associated property.

1. Go to ‘Project Manager’ and scroll down to the ‘sync completions to housing’ tile. The figure shown on the tile is the number of properties which are available to sync, this will include all addresses which are 100% complete and have been marked as ready within progress monitoring.
2. To start the process, hover over the three dots and click on ‘Sync to Housing’. Select ‘Yes’ to send over the completed addresses to Lifespan Housing.



You will see the progress updated on the tile underneath the property count, along with details of the last sync and the sync status.

3. For further details of the sync, go into the housing reports to view the following information;
   - Housing Report (Updates) – Shows the property UPRN, time and date of the update to housing, name of the user who requested the sync and whether the property has any exceptions.
   - Housing Report (Exceptions) – Shows the property UPRN of any addresses which failed to update in housing, date of sync, failure reason and details. Once any issues have been resolved and re-synced, the final columns will be populated to show whether the failure has been resolved, who by, when and includes any comments made.



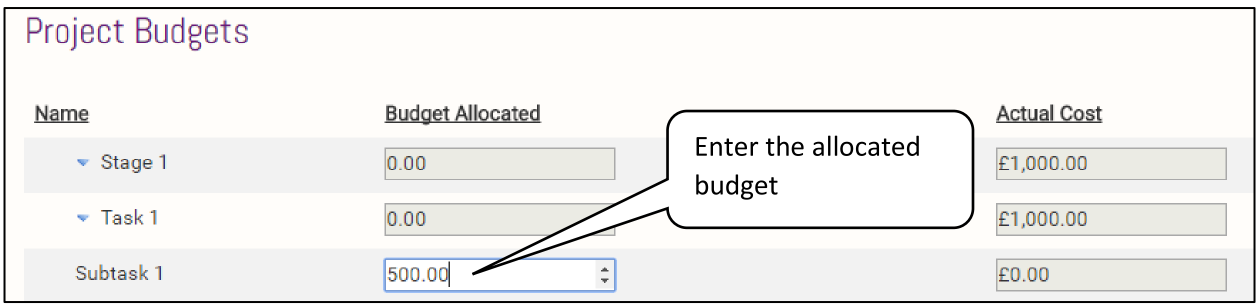
5.5 Budgets

When creating a new project an estimated total budget can be set, however, you will almost always want to break that budget down based on how you are going to run that project. Lifespan Projects enables a budget to be specified for each task, which in turn gives you total budgets for each stage and an actual planned budget for the project as a whole. The steps below explain how this can be achieved.

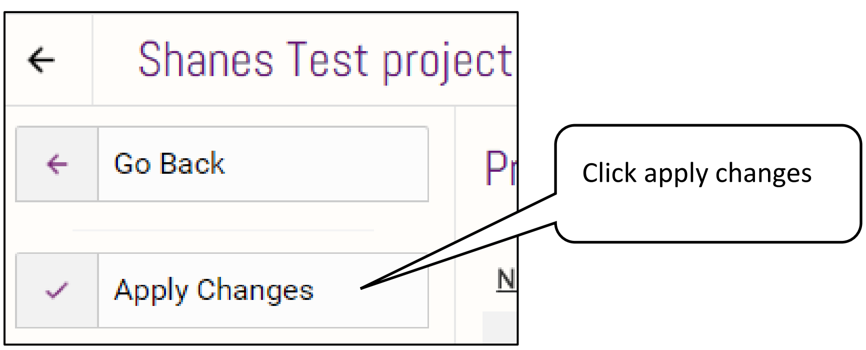
5.5.1 Adding a budget

1. Click on Budget. The project budgets screen will open.

2. Every task in the project will allow for a budget value to be set. For each task enter the allocated budget.



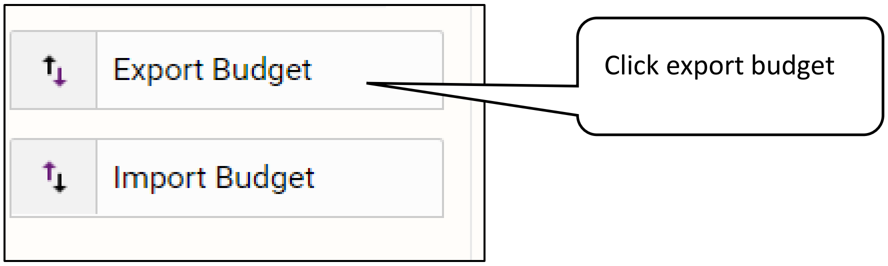
3. When all budget allocations have been complete, click 'Apply Changes'. Totals are not calculated until this is done.



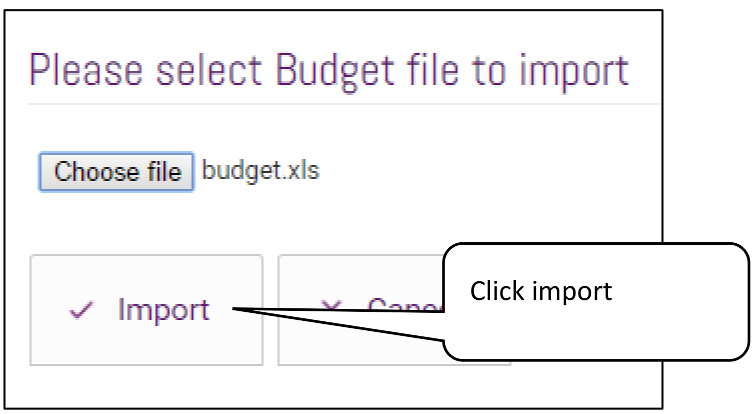
5.5.2 Import and Export from spreadsheet

Sometimes, on larger projects, it may be easier to use Microsoft Excel to set all of the budgets instead of doing it directly through your web browser. That is why Lifespan Projects supports the ability to read budgets from Microsoft Excel spreadsheets and the following steps will take you through that process.

1. To export the current projects budget, click on the 'Export Budget' button.



2. A Microsoft Excel spreadsheet download will begin, save this to a location you can easily access and then open it
3. From within Microsoft Excel, set your budgets for each task. You will see that the totals will auto-calculate for you.
3. When all of your budget has been allocated, save the spreadsheet.
4. Back in Lifespan Projects, click on the 'Import Budget' button
5. In the popup window, click on the "browse for file" button (this will vary depending on your web browser), locate the previously saved Spreadsheet and click on 'Open'
6. Click on the 'Import' button



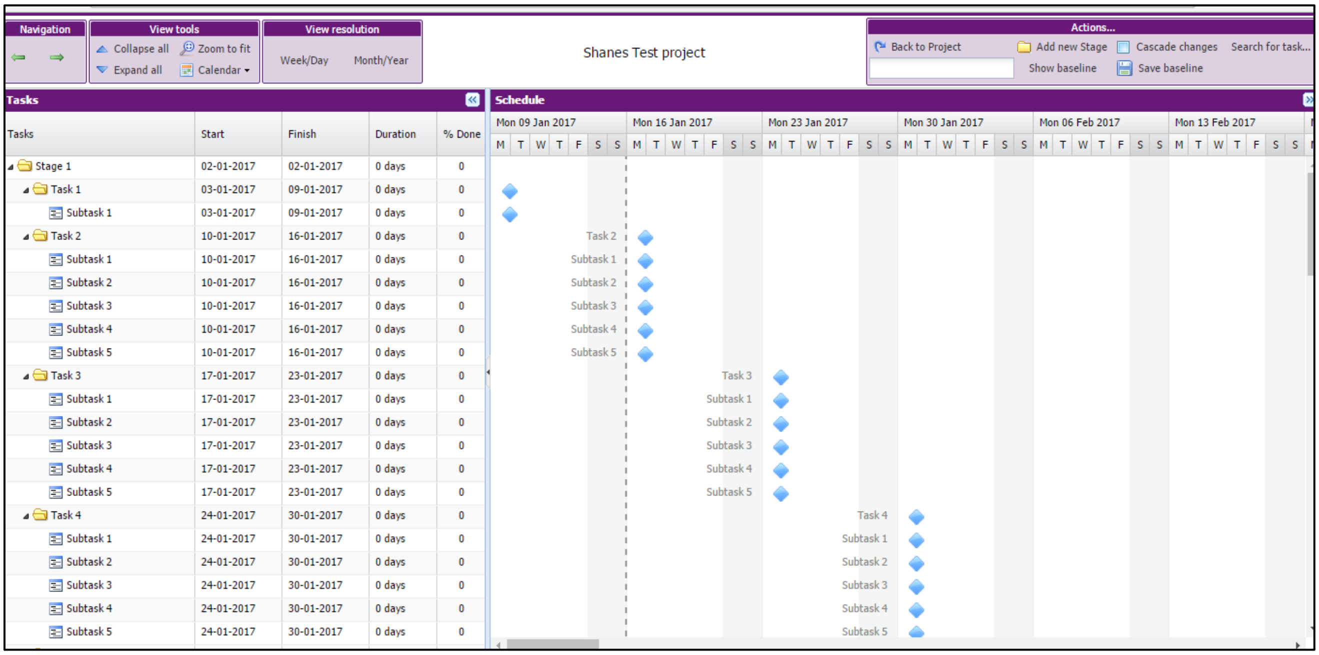
The Project Budget should be updated and saved. As the project progresses you can come back to the **Project Budgets** page to compare and contrast your planned budget against actual costs.

NOTE If you cannot see the **Budget** object in the project task list it is most likely due to access restrictions. You need to request access from that projects project manager, but if you are the project manager, please raise a support ticket as the Budget object may not be enabled on your company's account.

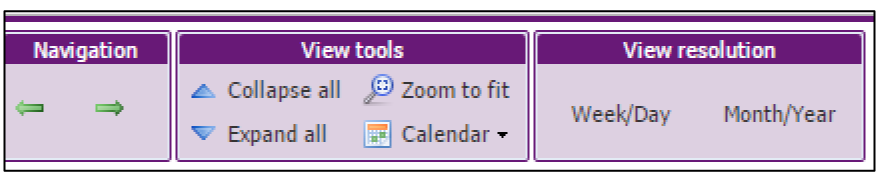
5.6 Project Time Chart

The project time chart allows you to view your project in a Gantt chart format. You can also add, edit or delete stages, tasks and sub tasks.

Click on Project time chart and the project time chart page will open.



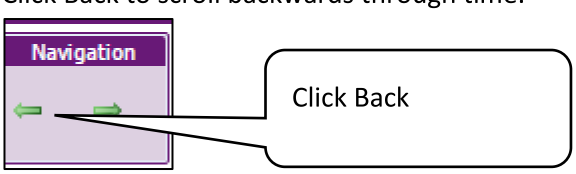
5.6.1 View Toolbar



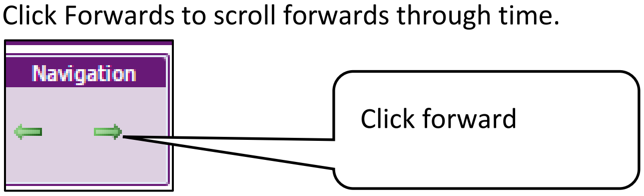
The view toolbar is located at the top left of the project time chart.

1. The navigation bar causes the Schedule section to scroll backwards or forwards through time.

3.2.1 Click Back to scroll backwards through time.

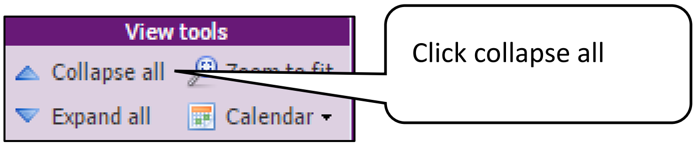


3.2.2 Click Forwards to scroll forwards through time.

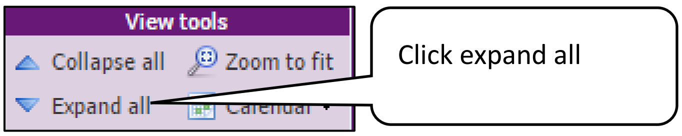


2. The view tools allow to you expand or collapse stages and to zoom the project time chart to fit on the screen.

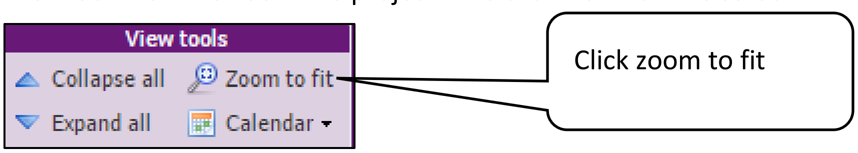
   a. Click collapse all to collapse all stages and tasks.



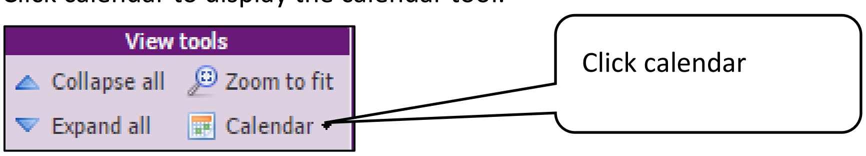
   b. Click expand all to expand all stages and tasks.



   c. Click zoom to fit to zoom the project time chart to fit on the screen.

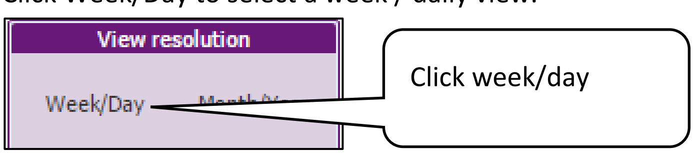


   d. Click calendar to display the calendar tool.

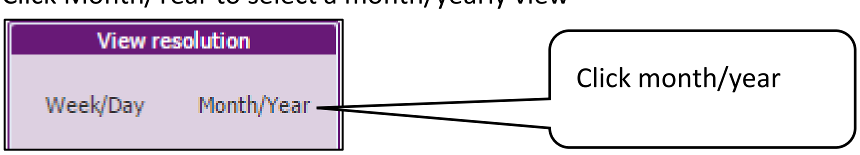


3. The view resolution toolbar toggles between a daily / weekly view to a monthly / yearly view.

   a. Click Week/Day to select a week / daily view.



   b. Click Month/Year to select a month/yearly view

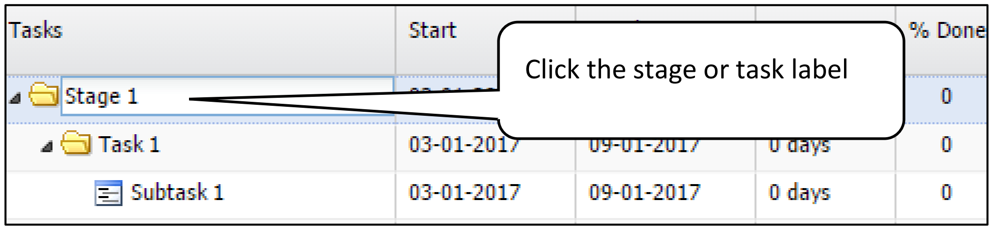


5.6.2 Editing Stages and Tasks

The tasks section allows you to rename stages and tasks plus change dates or change task duration.

1. To rename a stage or task click on the stage or task label.

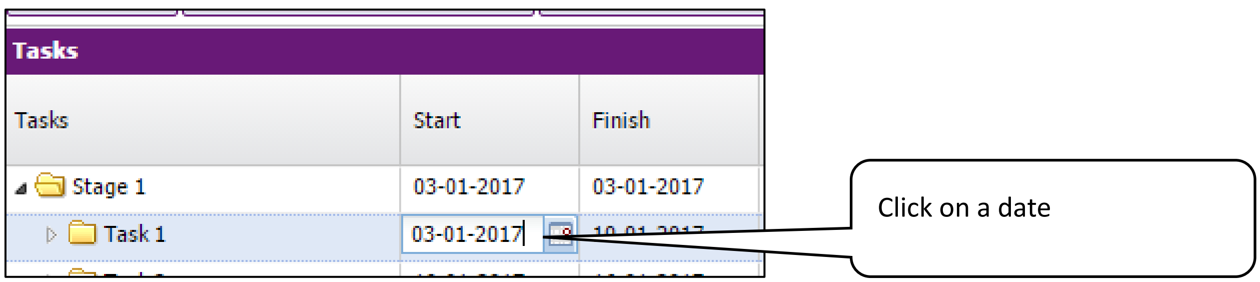
   a. Click on the stage or task label.



   b. Enter the new name for the stage or task and press Enter.

2. To change a date, click on the date

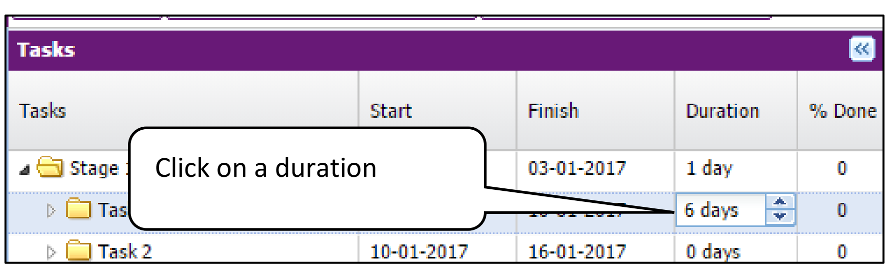
   a. Click on a date



   b. Enter the new date and press Return.

3. To change the number of days, click on the duration. This will automatically update the finish date based on the number of days from the start date.

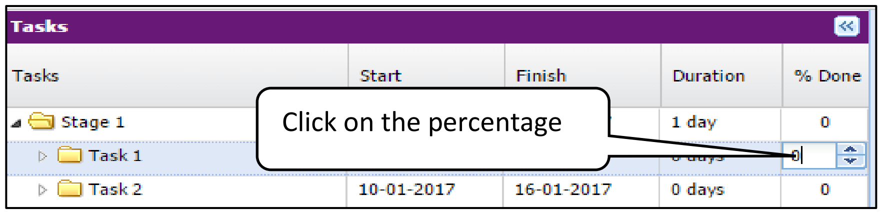
   a. Click on a duration



   b. Enter the required number of days and press return.

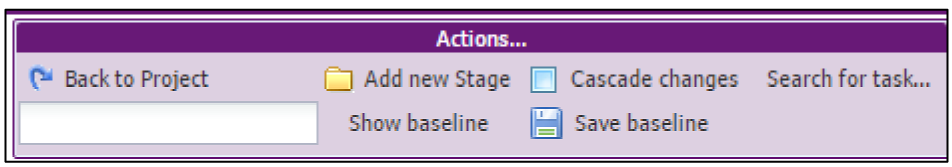
4. To change the percentage complete click on the percentage done.

a. Click on the percentage



b. Enter the required percentage and press return.

5.6.3 Actions toolbar



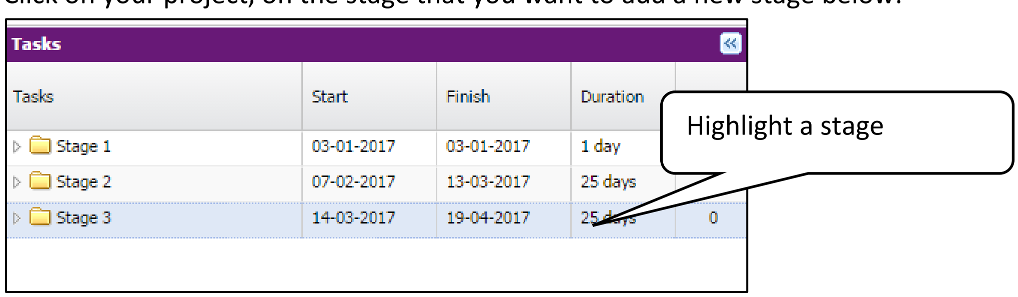
The actions toolbar is located at the top right of the project time chart.

1. Back to project takes you back to your project information page.

2. Save Baseline saves a snapshot of the project at the current time and works in conjunction with Show Baseline which will then overlay the saved baseline over the top of the project to allow you to compare the two.

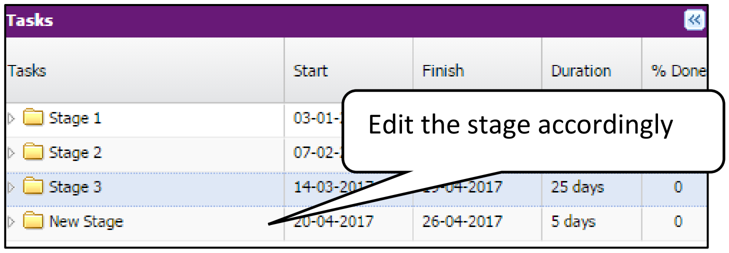
3. Add new stage allows you to add a stage to your project.

a. Click on your project, on the stage that you want to add a new stage below:



b. Click on Add new stage.

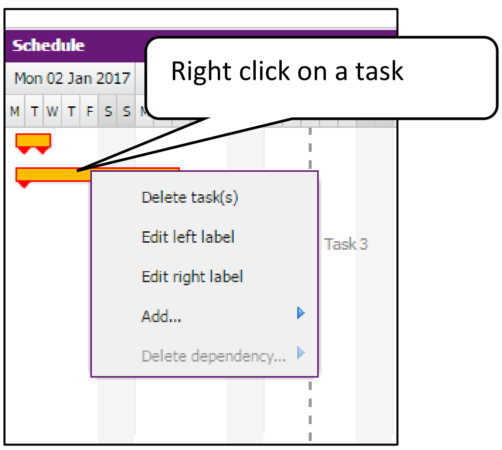
c. Edit the stage details accordingly.



5.6.4 Editing Tasks

We can add / edit or delete tasks directly in the GANTT chart.

1. Right Click on a task

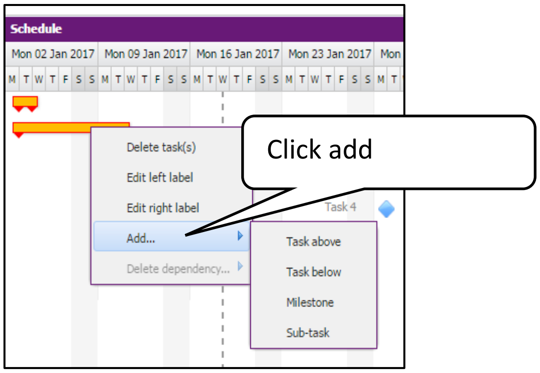


a. Clicking Delete Task will delete the task and any associated sub tasks. NOTE: This cannot be undone

b. Edit left label allows you to edit the left task label.

c. Edit right label allows you to edit the right task label.

d. Add allows you to add a task above or below the selected task, add a milestone to the task or add a sub-task.

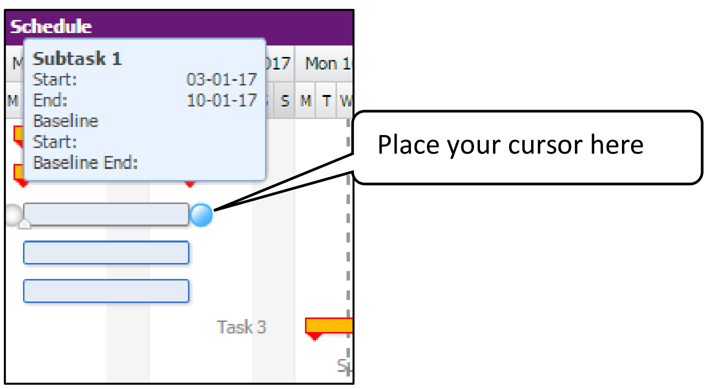


e. Select the task, milestone or sub-task accordingly.

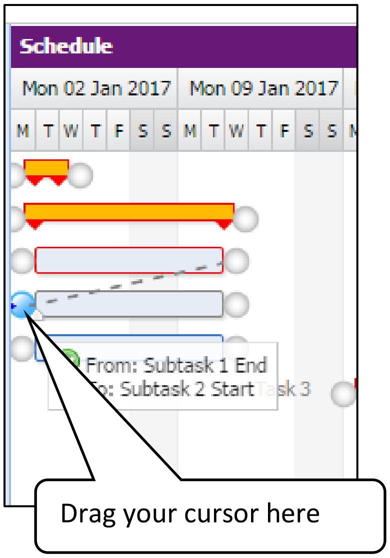
5.6.5 Adding dependencies

You can set tasks to be dependent on the previous task which means that the task cannot start until the previous task has been completed. Any changes you make to the previous task will be cascaded to the dependant tasks.

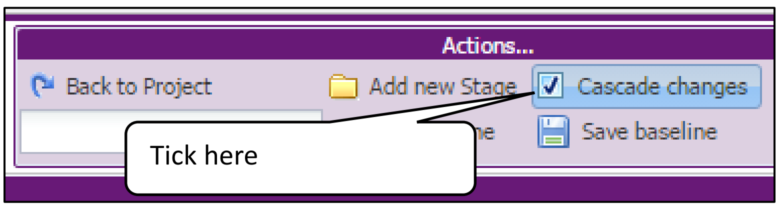
1. Place your mouse at the end of a task and a clue circle will appear



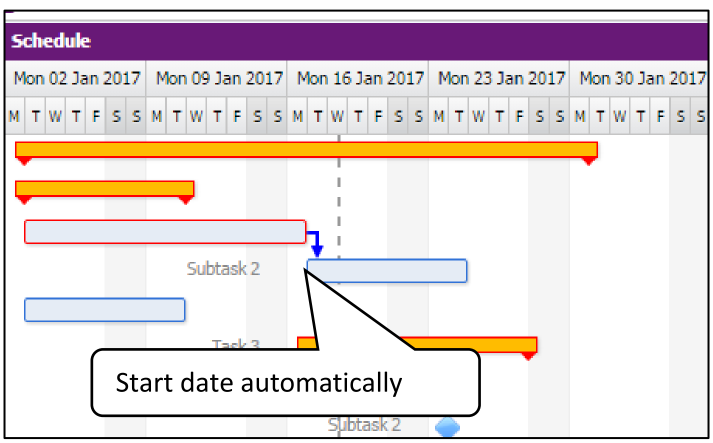
2. Holding the left mouse button down move the cursor to the start of the task you want to make dependant. When you see the blue circle at the start of the dependant task release the left mouse button.



3. Ensure Cascade changes is ticked

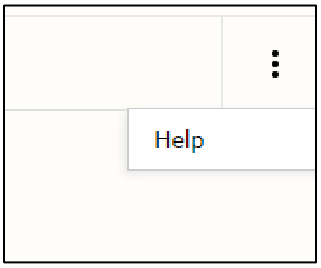


4. Changing the end date of the task will automatically update the date of the dependant task.

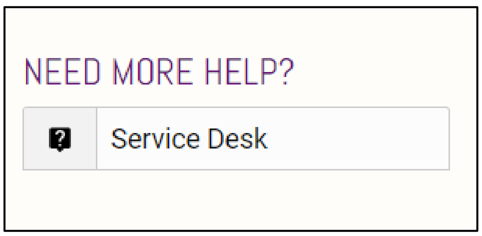


6. Help and Support

Lifespan Projects has in-built help which can be found by clicking the menu button at the top right of the projects page, then click on the 'Help' button.



If you experience any errors or need further assistance, you can contact us through our service desk. 'Service Desk' and then 'Submit a Ticket'. We'll get back to you as soon as possible.



You can also email the support team at: **manchester@property-tectonics.co.uk**