

honesty, integrity & professionalism



the topics

training

topic 1 - core data

lifespan housing training programme



TOPIC 1 Core Data

Basic data Structure & Hierarchy (Groupings)
General Navigation & Widgets
Attribute Types, calendar, notification and Planned Maintenance
General Documents
Importing and Exporting of works and attributes using excel

TOPIC 2 Housing Quality Standard & Energy

Introduction to National Housing Quality standards & HHSRS
Introduction to Energy Assessments
Importing and exporting Housing Quality Standards using excel
Carbon in Homes (if Applicable)

TOPIC 3 Compliance

Asbestos
Fire
Water
Appliance servicing
Importing and Exporting of Data using excel

TOPIC 4 Data Analysis

Reports Wizard
System Administration and permissions
Cost modelling
Component Cost Accounting

TOPIC 5 System Design (requires users to have undertaken topic 1)

Adding and editing Addresses
Creating and Editing Groupings and Look up Data
Creating and Editing Attributes and Look up Data
Creating and Editing Works and Look up Data

TOPIC 6 Property Performance Tool

Asset Liability Register
Property Analysis
Multi Property Analysis
Portfolio Analysis
Social Value Score (SVS) Analysis
SVS Templates
Updating SVS using Excel

TOPIC 7 Lifespan Mobile

Download and Installation of software
Property address/survey list download
Navigation
Photographic records
Attribute survey
Housing Standards
Energy assessment
Fire Risk Assessment
Asbestos risk assessment
Validation and synchronisation of data

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Links

UAT

Housing site www.pt-lifespan.com/UatLifespan

Admin site: www.pt-lifespan.com/UatLifespanClientAdmin

Live

Housing site: www.pt-lifespan.com/LifespanWeb

Admin site: www.pt-lifespan.com/LifespanWebClientAdmin

topic 1: core data



Introduction & Navigation

Overview

The summary page shows an overview of the currently selected property. Properties can be part of fully cloned to other properties using the copy facility.



Property Detail	
Year Built	2011
Number of Bedrooms	2
Heating	Not Set
Garden	Not Set
Conservatory	Not Set
Garage	Not Set
Car Parking	Not Set
Archetype	Not Set
Storeys	Not Set
Construction	Not Set
General Condition	Not Set
Disabled Facilities	Not Set
New Kitchen Date	2034
New Bathroom Date	2024
ECO Funding	Not Set

Demonstration

The demonstration will show how to:

- 1 Navigate the system and filter your address list.
View and use stock profile & Property detail pages.
- 2 Create and save filters
- 3 Add a new property
- 4 Edit an existing property
- 5 Delete a property
- 6 Copy property attributes from the selected property to others
- 7 Access and use the Properties Import Export Sheet to add another URPN.

Tasks

- Create a new property with the URPN as any random number preceded by '000' and any address you like.
- Copy the RdSAP data from '2a Alne Terrace' to your property.
- Create a new URPN using the Import Export Sheet in Excel.

groupings



Overview

Property Groupings are used in a number of areas in the software and are particularly important as part of filtering and data analysis. It is important for users to be able to understand how to view, assess and update groups as part of their system knowledge.

Demonstration

The demonstration will show how to:

- 1 How to use grouping in a filter
- 2 How to view Groupings
- 3 How to update Groupings
- 4 How to update groupings for more than one property at a time.
- 5 How to use the Import Export sheet for Grouping updates in excel.

Tasks

Add the following to your property:

- An asset Type using to one of your URPN's UI
- Add a Local Authority or Block information using the Import Export Sheet in excel.

attributes & planned maintenance



Overview

The property attributes page shows the features and planned maintenance of the property.

There are three types of property attributes: property information, planned maintenance and HHSRS.

Demonstration

The demonstration will show how to:

- 1 Add a property attribute
- 2 Edit an attribute
- 3 Delete an attribute
- 4 Use attribute Groups and filter the attribute view
- 5 The difference between Property Information Attribute and Planned Maintenance.
- 6 How to Add a work schedule to an attribute to create Planned maintenance.
- 7 How to edit Planned Maintenance and change the rate applied.
- 8 Mark works as complete
- 9 Attach a file to a property attribute and how to see sub attributes.

The screenshot shows the 'Property Attributes' interface for property AKNR0073. It features two tabs: 'Property Information' and 'Planned Maintenance'. The 'Planned Maintenance' tab is active, displaying a table with columns for Location, Sub-Location, Attribute, and Value. The table lists various attributes such as 'Cavity Wall Insulation', 'Double Glazing', 'Roof Fabric', and 'Services'. A summary row at the bottom provides details for 'Cavity Wall Insulation', including its priority (0 - Not Prioritised), condition (C - Average), quantity (48), date (01/05/2018), cost (£350), and completion status (False).

Location	Sub-Location	Attribute	Value
External	External Fabric	Cavity Wall Insulation	Introduce Insulation
External	External Fabric	Double Glazing	UPVC
External	External Fabric	Double Glazing	UPVC
External	External Fabric	Painting	Emulsion
External	External Fabric	Windows	UPVC
External	External Works	Boundaries (Front)	1.5m Brick & Metal Paving
External	External Works	Boundaries (Rear)	1.5m Brick
External	External Works	Gates	Timber
External	External Works	Gate 2	Metal
External	External Works	Patios	Concrete Flags
External	Roof Fabric	Bay Raft	Lead
External	Roof Fabric	Covering (Pitched)	State Tile
External	Roof Fabric	Rainwater Goods	Aluminium
Internal	Bathrooms/WC	Complete Bathroom	Bathroom Fittings and Floor Finish
Internal	Kitchen	Complete Kitchen	3 Bed
Internal	Roof Space	Insulation (Ceiling)	25mm
Internal	Services	Boiler	Gas Condensing Combi
Internal	Services	Central Heating (Hot System)	3 Bed
Internal	Services	Hot Water Heating	Cylinder

Collection	Action	Priority	Condition	Quantity	Date	Cost	Completed
Cavity Wall Insulation	Introduce Insulation	0 - Not Prioritised	C - Average	48	01/05/2018	£350	False

Tasks

Add the following to your property:

- An information attribute stating the year built as 1991.
- A HHSRS attribute for damp and mould growth.
- A kitchen attribute with a maintenance schedule and mark as complete using the import export sheet

documents



Overview

The documents page shows any files or images that have been attached to properties.

Attachments can be linked to fire, asbestos or to a specific property attribute.

Demonstration

The demonstration will show how to:

- 1 Add a file attachment
- 2 Add an image attachment
- 3 Edit an attachment
- 4 Delete an attachment
- 5 Link attachments to fire, asbestos or property attributes
- 6 Use the Import Export Sheets to upload data

Documents					ACKR5673 Adroyd Street 73, Openshaw, Manchester, M11 1NT	
Type	Description	Document Ref.	Date	Linked		
Image	Front Elevation		01/08/2012 00:00:00	Windows		
Image	Rear Elevation		01/08/2012 00:00:00			
Image	Boiler		01/08/2012 00:00:00	Boiler		
Image	Bathroom		01/08/2012 00:00:00	Complete Bathroom		
Image	Kitchen		01/08/2012 00:00:00	Complete Kitchen		
Image	Gas Certificate		01/08/2012 00:00:00	Boiler		

Tasks

- Upload a sample picture from the laptop and link it to fire.
- Upload a file from the laptop and link it to the boiler.
- Add a new Attachment using the Import Export Sheet