



Lifespan Projects Mobile User Manual

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1 Getting Started

Lifespan Projects mobile software has been designed to work in conjunction with Lifespan Projects. Its predominant use is to record survey information via a tablet or other mobile device which is then uploaded back into the system to update ongoing projects.

1.1 Launch Lifespan Projects Mobile

1. Launch Lifespan Housing by tapping the icon on your tablet's main screen.



Figure 1: open lifespan projects mobile

1.2 Sign In

1. Type in your Lifespan Projects username and password. To stay logged into the software, choose the option 'Keep me signed in'
2. Click 'Sign In'

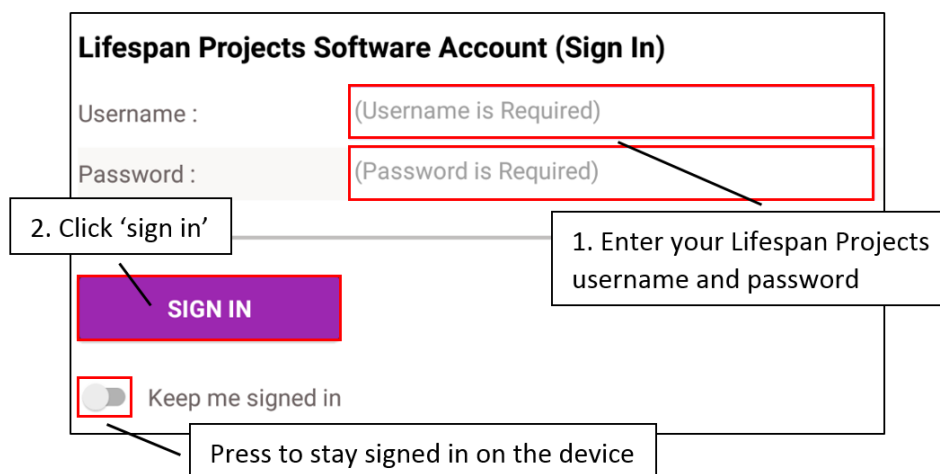


Figure 2: signing in

1.3 Layout and Navigation

After logging in you will be directed to the main screen.

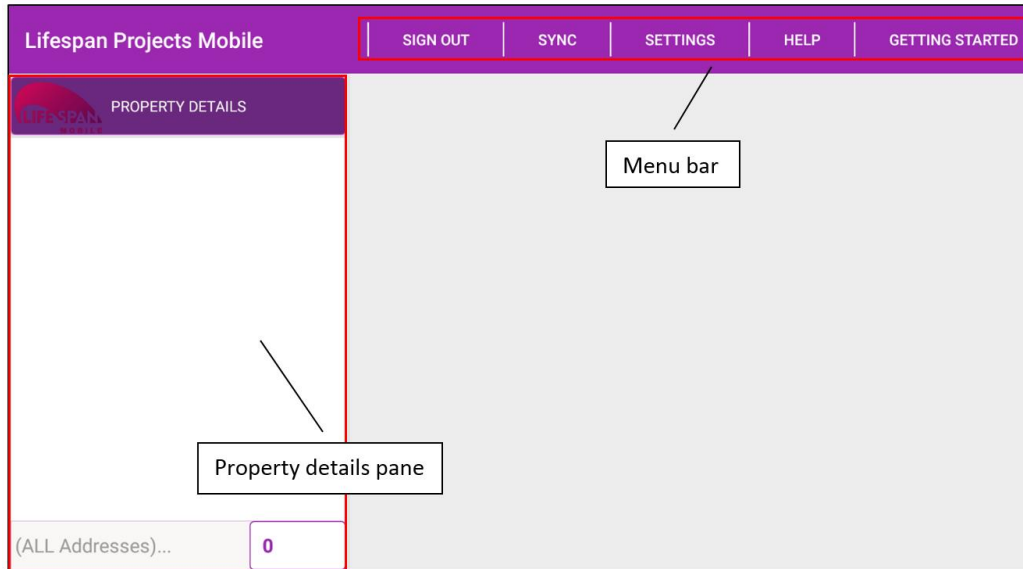


Figure 3: main screen

1.4 Menu Bar

The menu bar allows the user to select the following options:

- Sign Out – Sign out of Lifespan Projects Mobile.
- Sync – Synchronise properties to and from Lifespan Projects.
- Settings – View the setting options.

2 Sync Projects

The sync projects screen shows a list of projects you have access to and enables you to download or upload any changes made.

1. Click on the 'Sync' button from the menu bar.

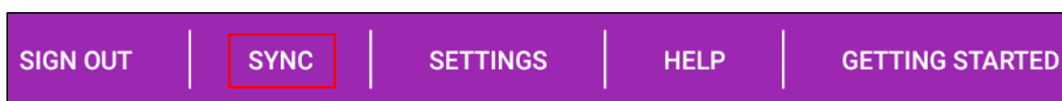


Figure 4: sync button

- To sync all projects, go to the bottom left of the screen and click 'sync all projects'.

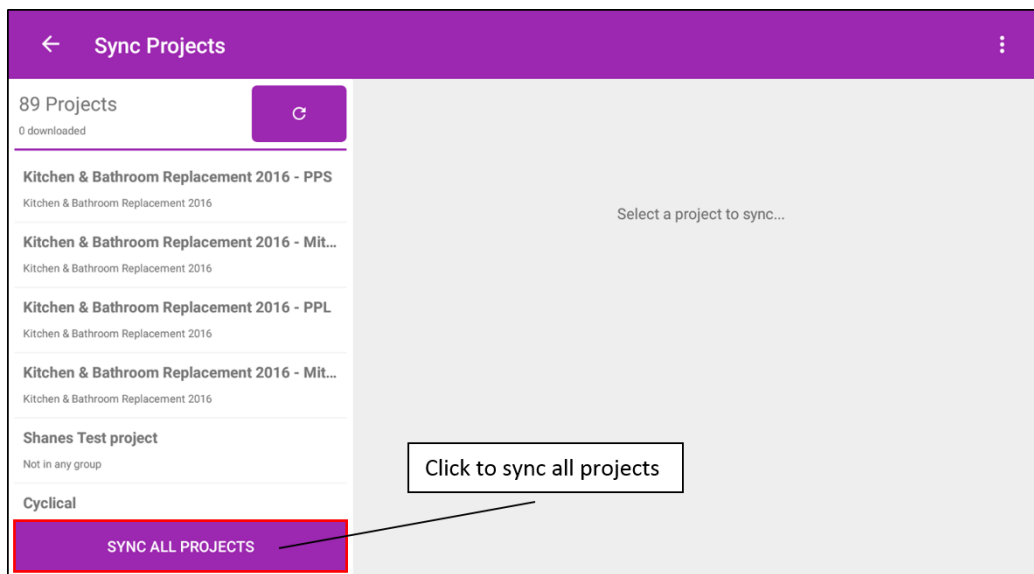


Figure 5: sync all projects

This will download all projects linked to your account. If you already have projects on your device, any changes made will be uploaded to Lifespan Projects.

- Alternatively, you can select specific projects by choosing them from the list on the left. This will bring up an overview of the project, displaying the number of addresses, how many have been downloaded and how many have been updated since the last sync. While on the selected address, press 'sync project' to sync it to your account.

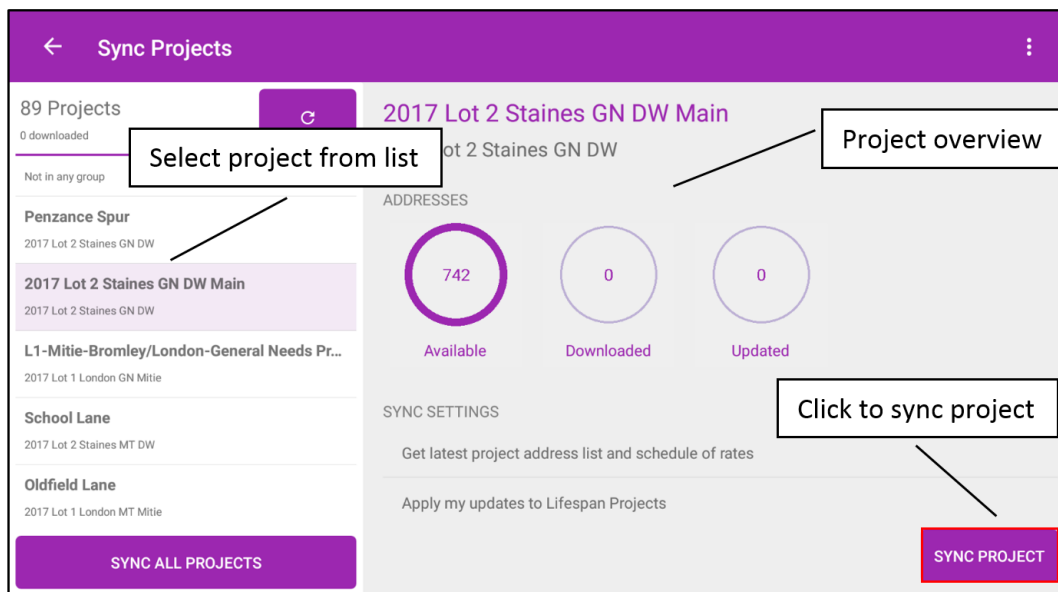


Figure 6: sync project

Now when you go into sync projects, the downloads will appear at the top of the list and the number of downloaded projects will show at the top of the screen.

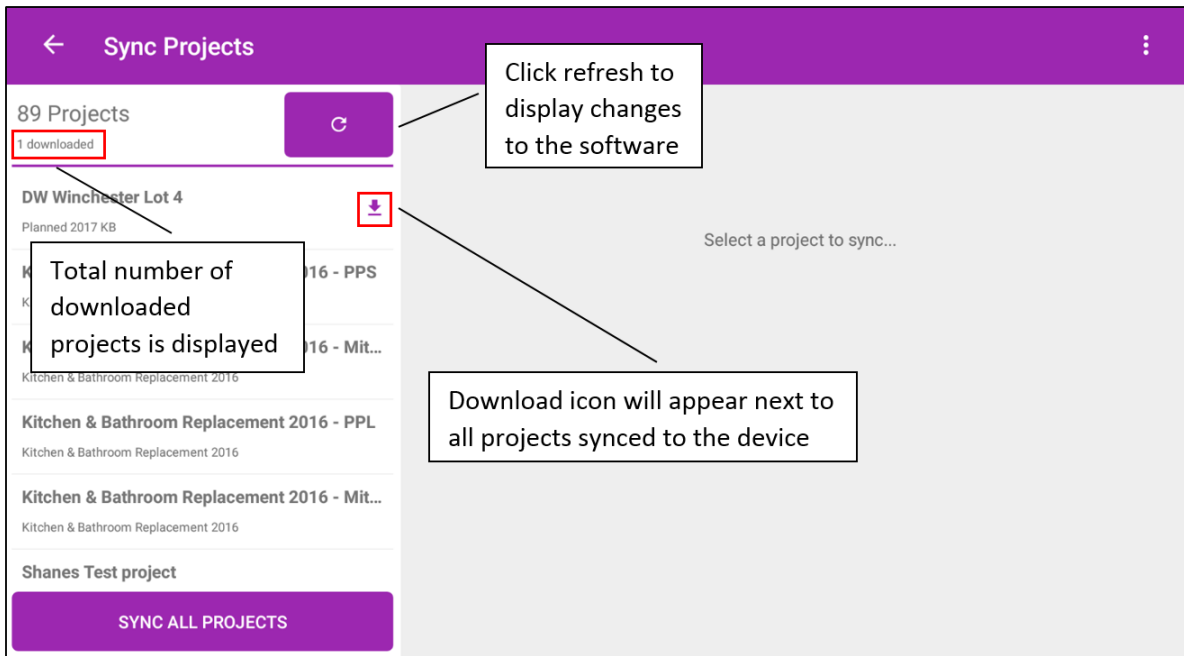


Figure 7: downloaded projects

4. You can also backup the database from the sync projects screen. Click the 3 dots in the top right of the screen and then on 'Backup Database'. This will create a copy of the database currently on the tablet and send a backup to external storage.

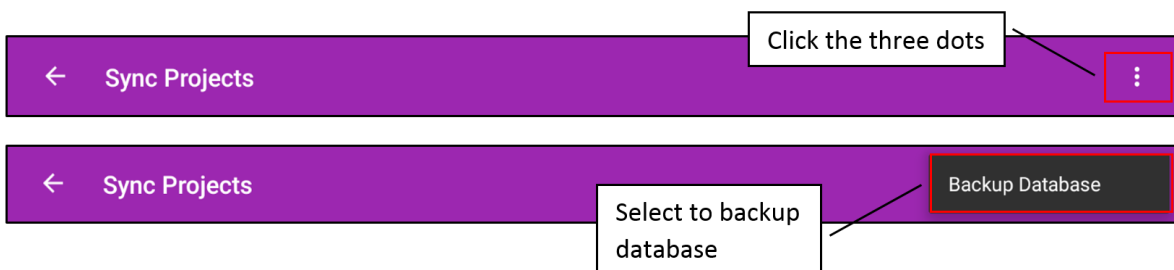


Figure 8: create a backup of the database

3 Settings

1. Click on settings from the menu bar to bring up the options.

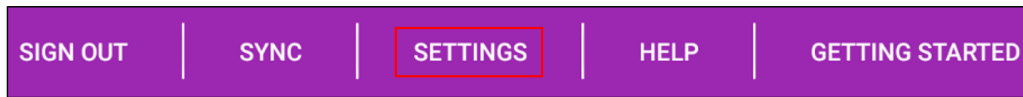


Figure 9: settings button

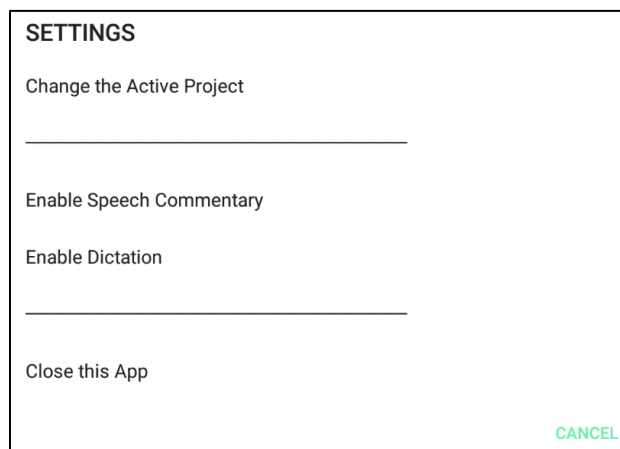


Figure 10: settings options

Click into any of the options to enable it's use in the software.

After you have downloaded for the first time, select the 'Change the Active Project' function to go into the project to display the linked addresses. Subsequently, click to change the project you are currently working on.

4 Properties

After selecting an active project, the addresses linked to it will appear in a list on the left. Click on a property to see its details on the right.

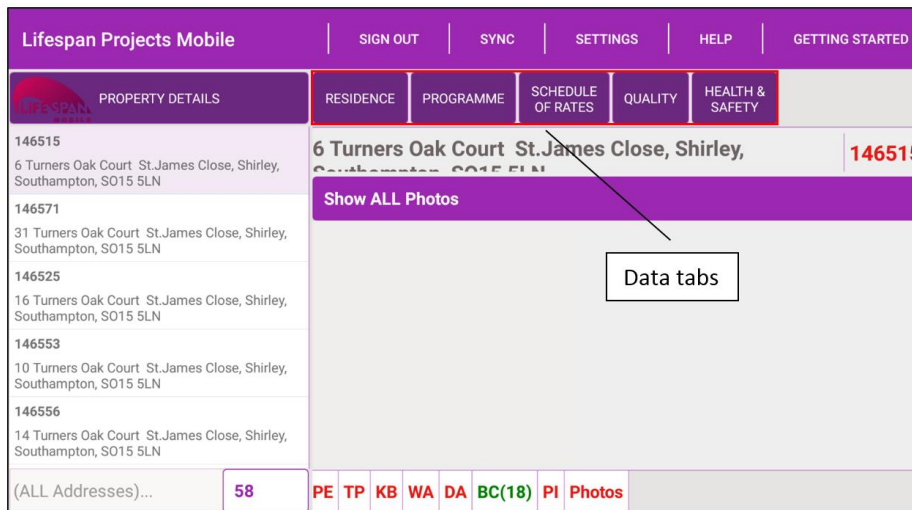


Figure 11: property screen

You will see five separate tabs along the top of the screen, clicking into any of these will offer more options and allow you to input data which will populate the relevant stages and tasks in Lifespan projects once uploaded.

Any photographs linked to the property will be displayed to the right of the screen.

Within Lifespan Projects there is a safeguard option that can be applied to a property, which is stored in tenant contact details. If this is marked as 'yes', a message will appear on the property details page stating 'Do Not Visit Alone' as shown below.

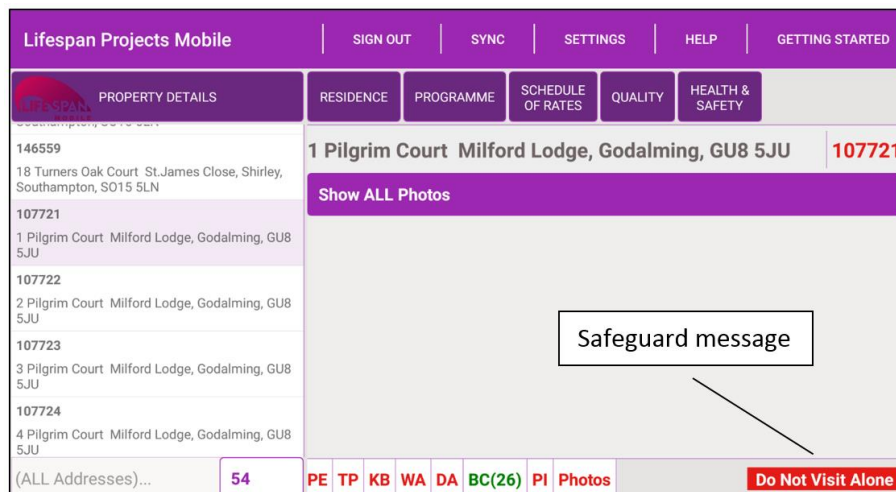


Figure 12: safeguard message

NOTE This can only be added or removed through Lifespan Projects and cannot be altered from the mobile software.

4.1 Filters

By default, all properties in the project will be displayed on the main screen, however, there is a function in the software to allow you to easily filter to the property required.

1. In the bottom left of the screen under the list of properties, type in the search bar all or part of the address or UPRN required.
2. Click on the box to the side of the search bar (the figure shown is the total number of properties in the current filter).

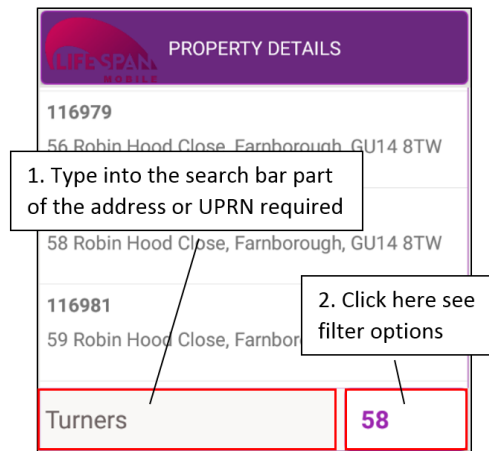


Figure 13: address search

3. The filter options will appear on the screen as below, select the appropriate choice to narrow down your search by the address or UPRN.

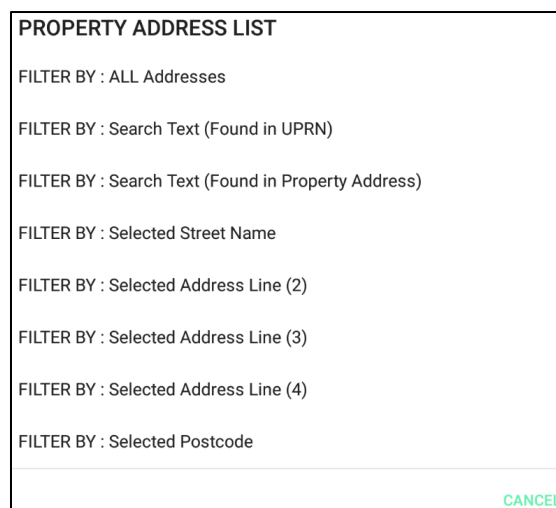


Figure 14: address filters

The filtered results will now be displayed on the main screen and the box to the right will show how many properties are listed in the new filter.

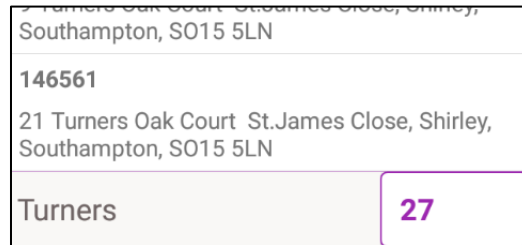


Figure 15: filtered addresses

5 Residence

The residence tab enables survey data to be collected on site for the following assessments prior to work starting;

- Pre-Entry Assessment
- Tenant’s Profile Assessment
- Tenant’s Preferences (Kitchen and Bathroom)
- Tenant’s Preferences (External Decorations)
- Tenant’s White Appliances Assessment
- Disabled Adaptations Referral
- Contractor

To complete any of these, simply choose it from the menu to bring up the fields.

1. Click on the ‘resident’ data tab on the main screen.

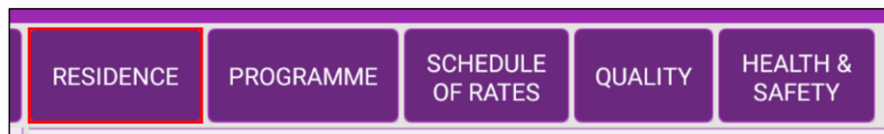


Figure 16: residence data tab

2. Select from the list the assessment you want to complete.

RESIDENCE

Pre-Entry Assessment

Tenant's Profile Assessment

Tenant's Preferences (Kitchen and Bathroom)

Tenant's Preferences (External Decorations)

Tenant's White Appliances Assessment

Disabled Adaptations Referral

Contractor

CANCEL

Figure 17: residence options

The assessments are split into multiple parts, with each part displaying its questions on a separate screen.

Depending on the question you will have either a drop-down list to choose from or a free-text box to type into. Any yes/no questions feature a slide bar, to answer yes just press on it and it will slide across and turn green.

The progress bar at the bottom of the screen updates as you work through each stage of the survey.

3. Work along each tab completing the fields as necessary, all mandatory questions are in purple text and marked with a star.

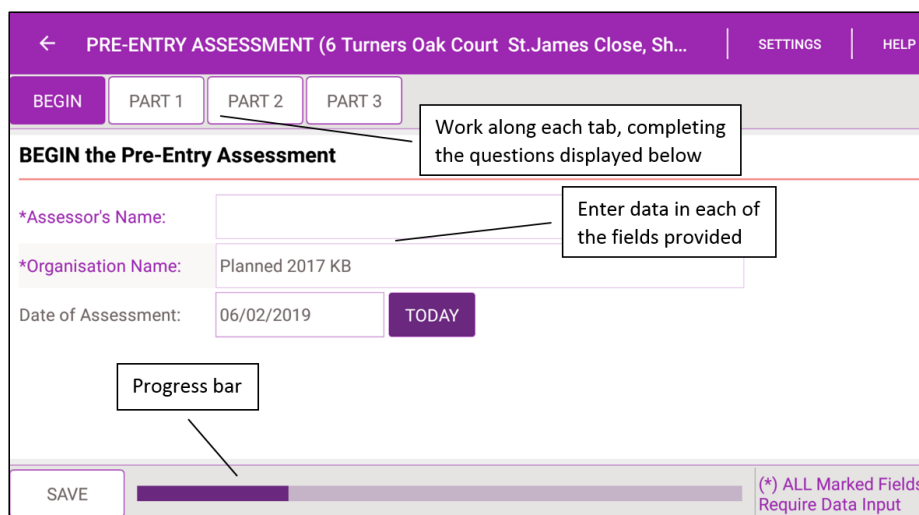


Figure 18: pre-entry assessment

4. Once you have finished the survey, click 'save'.

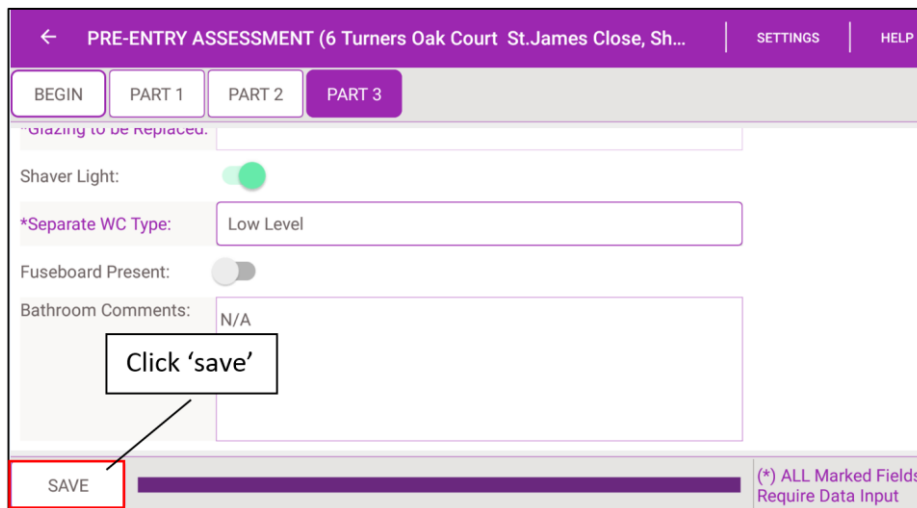


Figure 19: completing an assessment

This does a quick validation of the data and an error will appear if any mandatory questions have not been completed.

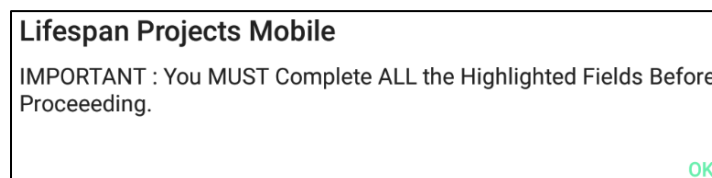


Figure 20: error message for incomplete survey

All incomplete fields will now be highlighted in red until they are filled in, and the assessment successfully saved.

6 Schedule of Rates

The schedule of rates tab is where all associated work attributes should be recorded for each stage of the project. Once the data for a property is collected and uploaded, the information is updated in Lifespan Projects to enable components and costs to be approved at the various stages.

There are 4 stages in schedule of rates, where attributes can be included, amended or removed throughout the project;

- Stage 1 – Initial review and recording of relevant attributes.

- Stage 2 – Here you can include/exclude a component, change the quantity or confirm the quantity from stage 1.
- Stage 3 – Here you can include/exclude a component, change the quantity or confirm the quantity from stage 2.
- Stage 4 – Completion. At this stage you can record whether or not the work has been completed to a satisfactory standard.

1. Click on the 'schedule of rates' data tab on the main screen.

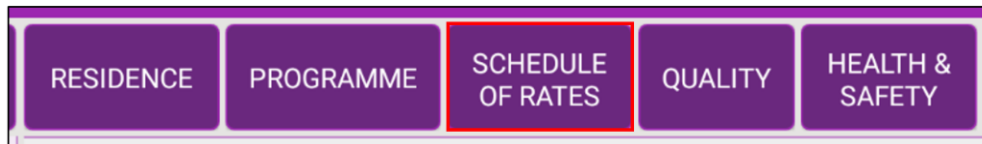


Figure 21: schedule of rates data tab

2. Select from the list which stage of the project you are currently at.

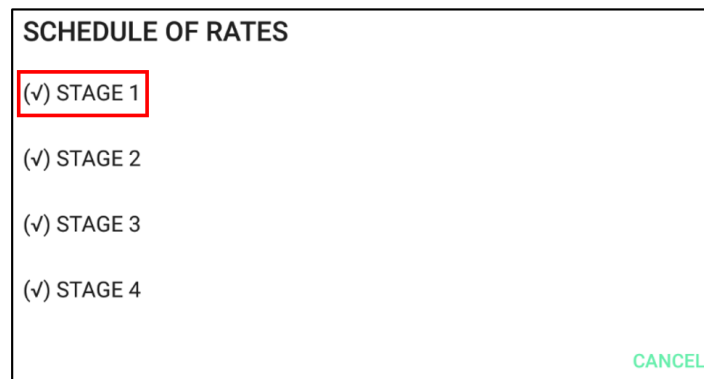


Figure 22: schedule of rates options

Stage 1 – Budget Stage 2 – initial survey Stage 3 – Works on site variation Stage 4 - Snagging

The screen will now show the schedule of rates for the property selected.

The components are grouped by category in three steps. To filter to the item needed you can either select the headings from the main screen, go to the 'all category' buttons on the left and select from the lists or apply a filter from the search bar in the top left.

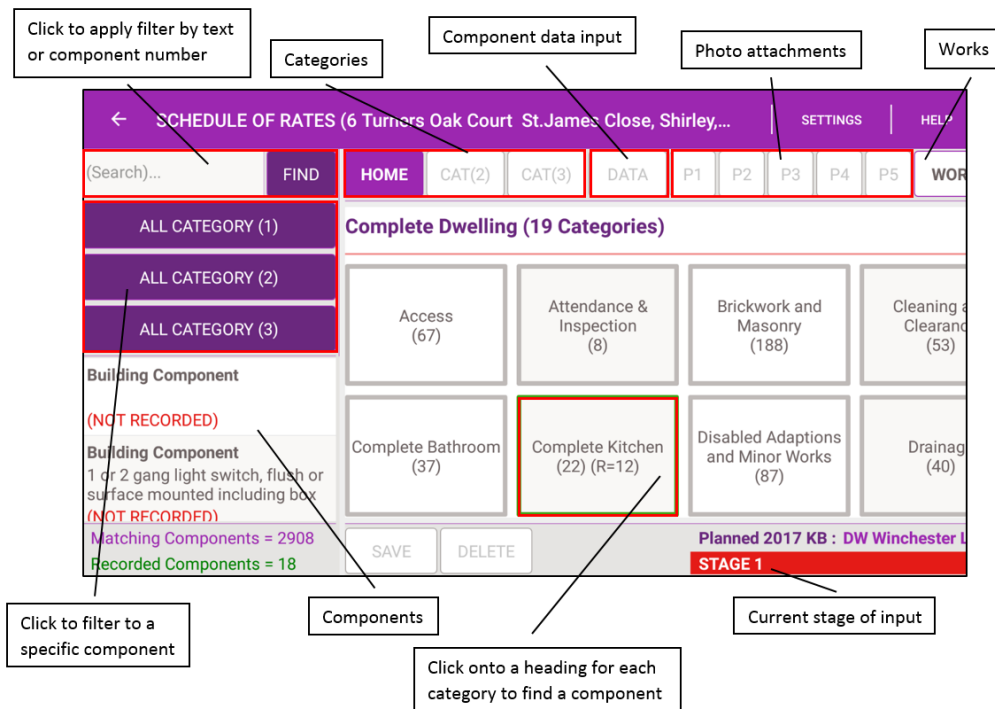
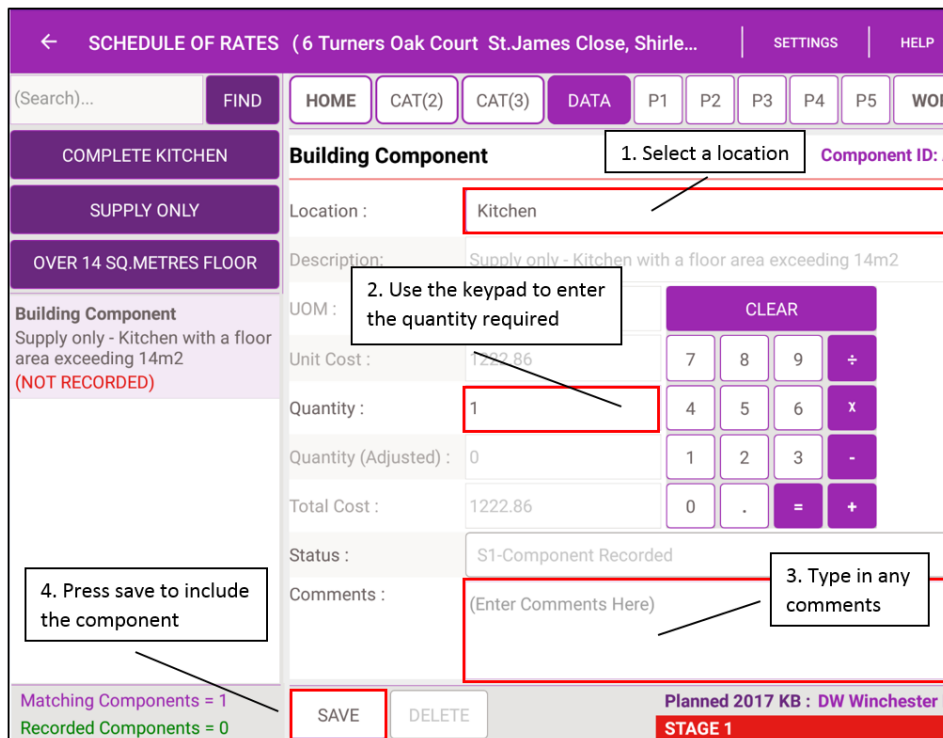


Figure 23: schedule of rates

- Once you have selected a component from the list the building component page will be displayed, allowing you to update it.

Choose the location from the drop-down list and set the quantity using the number pad to the right. Any comments can be entered in the section at the bottom of the screen.

Press 'save' to include the component.



Building Component 1. Select a location Component ID: A

Location : Kitchen

Description: Supply only - Kitchen with a floor area exceeding 14m2

UOM : CLEAR

Unit Cost : 1222.86

Quantity : 1 2. Use the keypad to enter the quantity required

Quantity (Adjusted) : 0

Total Cost : 1222.86

Status : S1-Component Recorded

Comments : (Enter Comments Here) 3. Type in any comments

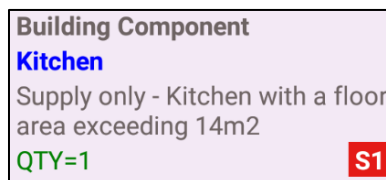
Matching Components = 1
Recorded Components = 0

SAVE DELETE

Planned 2017 KB : DW Winchester L
STAGE 1

Figure 24: including a component

The component will now be updated on the device. Whereas before it was showing in the list on the left as not recorded, it now displays the location, quantity and stage details.



Building Component
Kitchen
Supply only - Kitchen with a floor area exceeding 14m2
QTY=1 **S1**

Figure 25: saved building component

At stage 1, you are including the component, so the status is already set. However, as you go through each stage the status can be amended as per the requirements of the work. To update the status, click into the field and select the appropriate option;

- Component OK – should be selected at stages 2 or 3 if the quantity of the component is accurate and doesn't need to be changed.

- Exclude Component (Incorrect Description) – can be used at stages 2 or 3 if a component has been added by mistake and needs to be replaced. Change the quantity to 0 and select this option.
- Include Component (Corrected Description) – can be used at stages 2 or 3 to include a new component.
- Corrected Quantity – to be used at stages 2 or 3 if the component is correct but the quantity needs to be amended. Enter the correct quantity and select this option.

Stage 4 is the final review to check the completion of the works. At this stage you can select a status to show whether the work has been completed or not, whether it was done to a satisfactory standard; or state the corrected quantity if this varies from data inputted at the previous stage.

SELECT THE STATUS

S4-Work Not Completed

S4-Work Completed (Satisfactory)

S4-Work Completed (Unsatisfactory)

S4-Work Completed (Corrected Quantity)

CANCEL

Figure 26: stage 4 status

Once uploaded, the data collected at stage 4 will update the final contract value within Lifespan Projects along with providing information for work inspection and snagging reports.

6.1 Attaching a photograph

The software enables you to attach a photograph at any stage within the 'schedule of rates' tab. You can add up to five images per component via the device photo gallery, or the camera app.

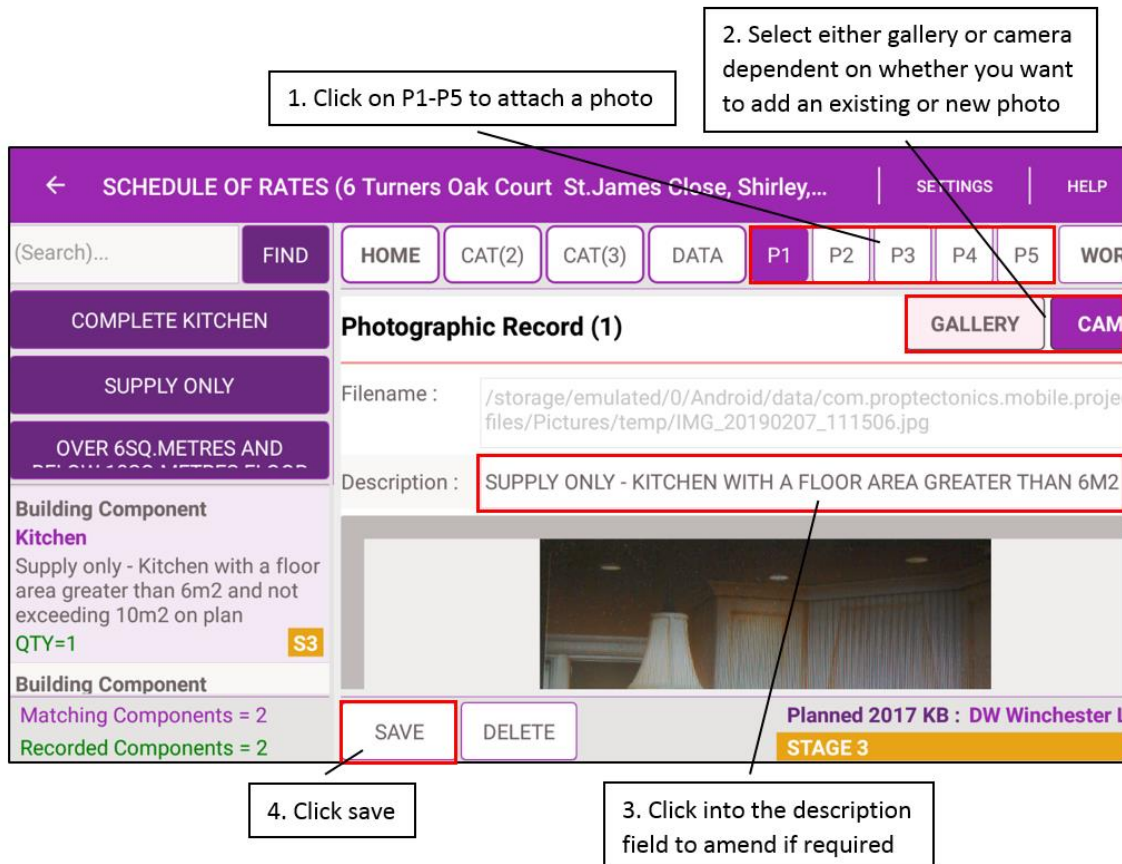


Figure 27: attaching a photograph

1. After selecting a component, go to the bar along the top of the screen and select P1 (P2-P5 for further images).
2. Select 'Gallery' to choose a photo stored on the device or 'Camera' to activate the camera app and take a new image.
3. The file name will be generated automatically, and the standard description is the component name, however this can be changed if required by tapping into the field and typing in a preferred description.
4. Click 'save' to attach the photo to the component.

The component will now show that it has a photograph attached by showing the P symbol in the bottom right of the listing.

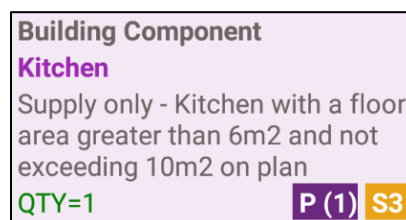


Figure 28: building component with photo

6.2 Works

Within schedule of rates, the 'works' tab gives you a break down of components for the specific property being viewed.

From here you can see the total number of works and the total cost so far.

1. To view a specific item of work, select it from the list and press 'selected works review'.

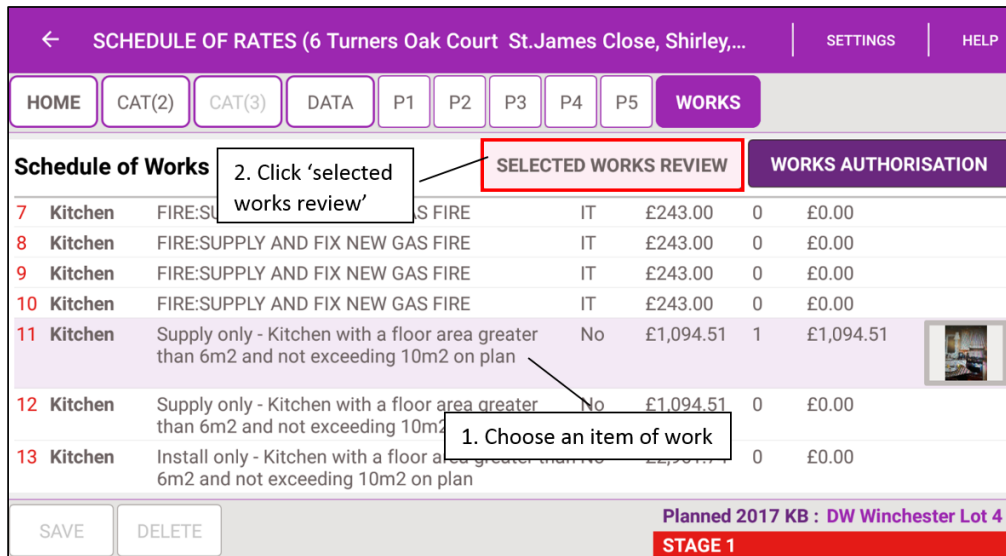


Figure 29: schedule of rates – works

This will bring up a screen showing all the details along with any associated photographs. You can amend the location, quantity required and add any comments as necessary before saving.

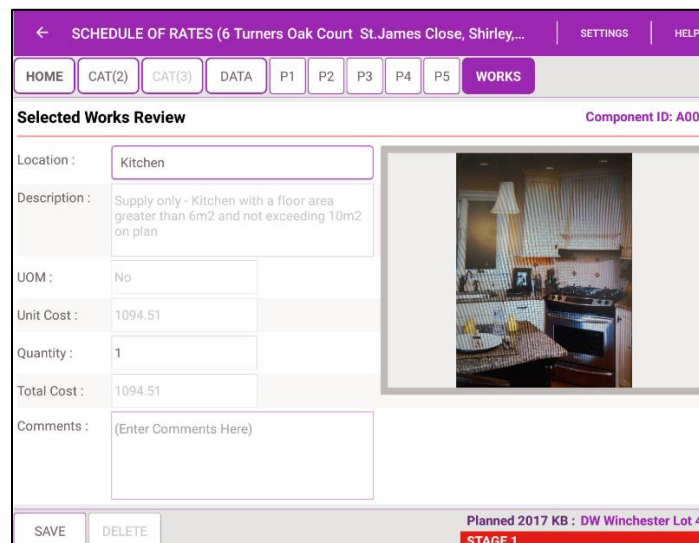


Figure 30: selected works review

- Go to 'works authorisation' to bring up the customer declaration screen.

This should be reviewed and signed by the tenant on site. It confirms that everything has been recorded accurately and they agree to the works being carried out.

Press the slide bar to enable information to be entered. The tenant should then type in their name, enter the date and use the box below it to write their signature as proof of consent.

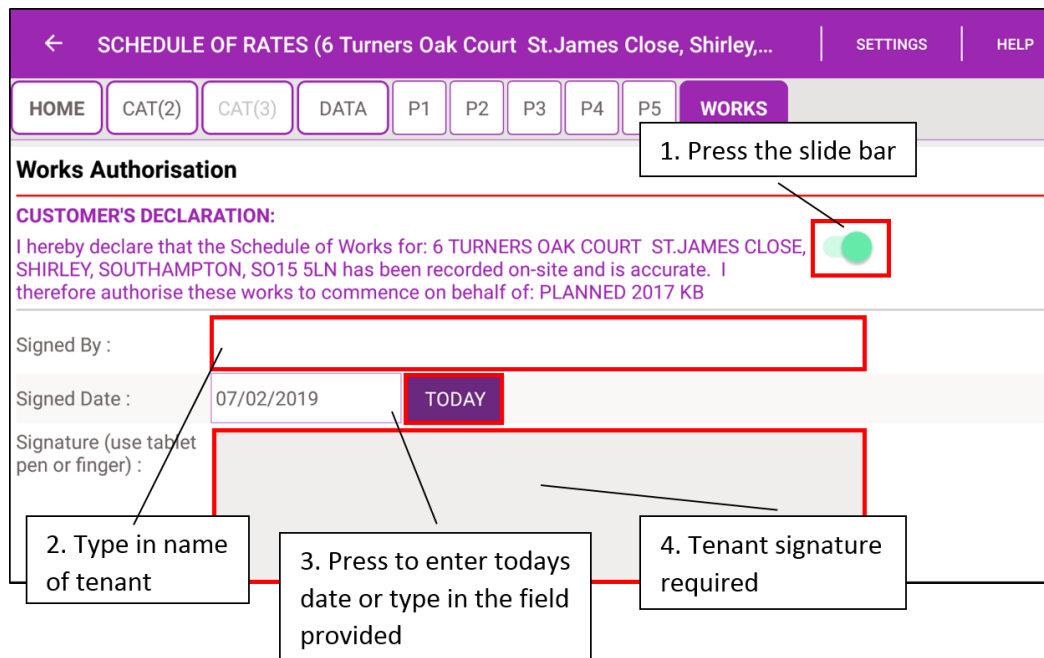


Figure 31: works authorisation

6.3 Snagging

Stage 4 is the snagging stage in the software, where any issues can be recorded before the property is marked as complete in Lifespan Projects.

As with previous stages, the information should be collected on the tablet by choosing a component and entering the details as necessary – using one of the four status options.

Below is an example for each status available;

HOME	CAT(2)	CAT(3)	DATA	P1	P2	P3	P4	P5	WOR
Unit Cost :	2961.85			7	8	9	+		
Quantity :	1			4	5	6	X		
Quantity (Adjusted) :	0			1	2	3	-		
Total Cost :	2961.85			0	.	=	+		
Status :	S4-Work Not Completed								
Comments :	Not complete								
SAVE		DELETE		Planned 2017 KB : DW Winchester L					
STAGE 4									

HOME	CAT(2)	CAT(3)	DATA	P1	P2	P3	P4	P5	WOR
Unit Cost :	2961.85			7	8	9	+		
Quantity :	1			4	5	6	X		
Quantity (Adjusted) :	0			1	2	3	-		
Total Cost :	2961.85			0	.	=	+		
Status :	S4-Work Completed (Satisfactory)								
Comments :	(Enter Comments Here)								
SAVE		DELETE		Planned 2017 KB : DW Winchester L					
STAGE 4									

HOME	CAT(2)	CAT(3)	DATA	P1	P2	P3	P4	P5	WOR
Unit Cost :	2961.85			7	8	9	+		
Quantity :	1			4	5	6	X		
Quantity (Adjusted) :	0			1	2	3	-		
Total Cost :	2961.85			0	.	=	+		
Status :	S4-Work Completed (Unsatisfactory)								
Comments :	Poor finish, cupboards damaged during install.								
SAVE		DELETE		Planned 2017 KB : DW Winchester L					
STAGE 4									

HOME	CAT(2)	CAT(3)	DATA	P1	P2	P3	P4	P5	WOR
Unit Cost :	2961.85			7	8	9	+		
Quantity :	1			4	5	6	X		
Quantity (Adjusted) :	2			1	2	3	-		
Total Cost :	5923.7			0	.	=	+		
Status :	S4-Work Completed (Corrected Quantity)								
Comments :	(Enter Comments Here)								
SAVE		DELETE		Planned 2017 KB : DW Winchester L					
STAGE 4									

Figure 32: stage 4 inputting

After being saved and the project synced, the information will be on Lifespan Projects.

Back in Lifespan Projects, go to Project Manager to view the 'work inspections' tile. The four completions shown above are displayed in the chart and split according to whether they were completed satisfactorily or not.

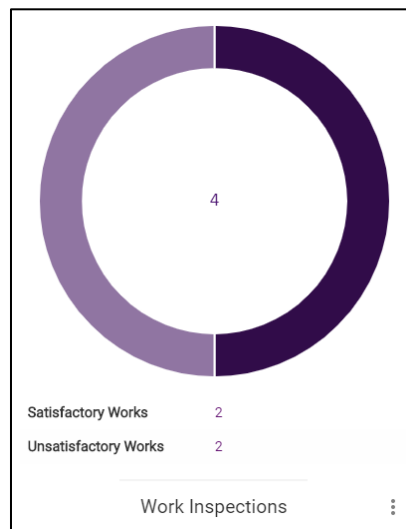


Figure 33: work inspections

- Satisfactory Works;
 - Work Completed (Satisfactory)
 - Work Completed (Corrected Quantity)

- Unsatisfactory Works;
 - Work Not Completed
 - Work Completed (Unsatisfactory)

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.

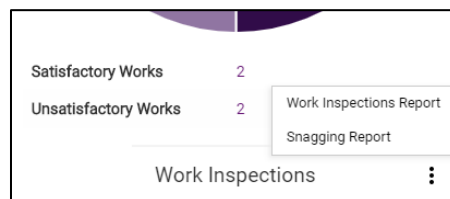


Figure 34: work inspections reports

1. Go to the three dots in the bottom of the tile and select 'Snagging Report'.

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		

Figure 35: snagging report

2. 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.

6.4 Settings

Go to settings at the top right of the screen. This will bring up a selection of options relating only to 'schedule of rates'.

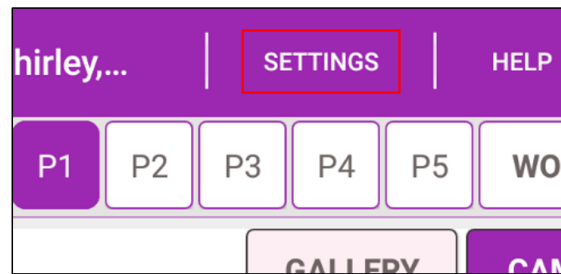


Figure 36: schedule of rates settings

- Set Default Quantity = 0 (PHASE 1 Only) – This selection will change the default value of each component added at stage 1 to a quantity of 0, so for every item being added a new quantity will need to be inputted. You can also change this default to show as quantity = 1 for each component.
- Show House Navigation Picture – This will change the format of the main screen, so instead of choosing a component from a description, you can choose which section of the house you are concentrating on and press on that area of the screen. You can go back to your previous display by returning to settings and selecting ‘Hide House Navigation Picture’.

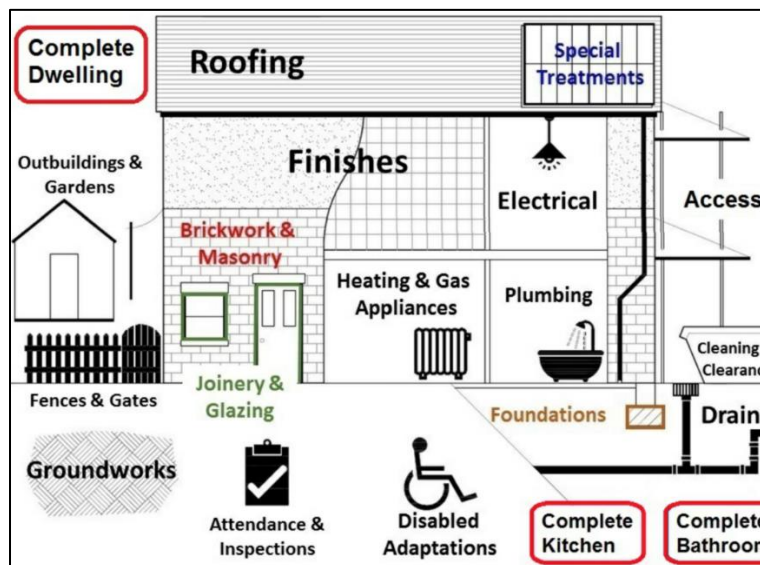


Figure 37: house navigation picture

- **Hide Filter Buttons** – this option hides the filter buttons on the main screen, giving you more space to enter data. You can add them back in by returning to settings and selecting ‘Show Filter Buttons’.
- **Change Column Layout – CAT(1), CAT(2) and CAT(3)** – This option enables you to change the layout of the main screen so you can see more or less categories on the screen at one time. There are multiple selections to choose from with various layouts.
- **Use Small Font Size** – Choose to view the screen in either a small or large font size.
- **Use Thin Cell Padding (for Components List)** – this option makes the components in the list slightly narrower so you can see more on the screen at one time. To make them bigger, return to settings and select ‘Use Thick Cell Padding (for Components List)’.