

honesty, integrity & professionalism



the topics

training

topic 8 -
pas 2035

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

TOPIC 8 PAS 2035

Lifespan Mobile – Data Collection
Lifespan Housing – Validation Export
Lifespan Housing – RdSAP and Occupancy Assessments
Lifespan Housing – Housing Assessment
Reporting – Static Reports
Reporting – Reports Wizard



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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

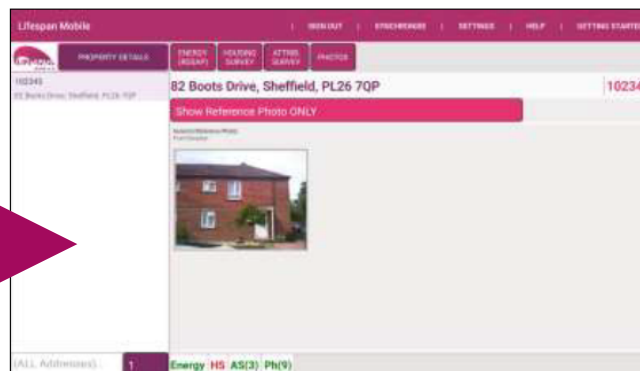
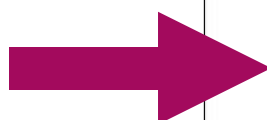
topic 8: pas 2035



Lifespan Mobile – Data Collection

Overview

Lifespan mobile software enables you to collect information for PAS 2035 and upload the data to the applicable module in Lifespan Housing. Collection includes energy and occupancy assessments, housing survey and photographs.



Demonstration

The demonstration will show how to:

- 1 Navigate to the energy module to enter energy and occupancy data
- 2 Access and enter details into the housing survey
- 3 Link photographs to a question within the housing survey
- 4 Upload an address to Lifespan Housing

Tasks

- View the energy assessment
- Open the housing survey, select a property type and begin the survey
- Link a photograph to a question within the housing survey

Lifespan Housing - Validation Export

Overview

The validation export sheet within Lifespan Housing allows for quick checking of information before reports are produced. The single spreadsheet will download to show all properties that hold PAS 2035 data and each question in the housing survey is included.

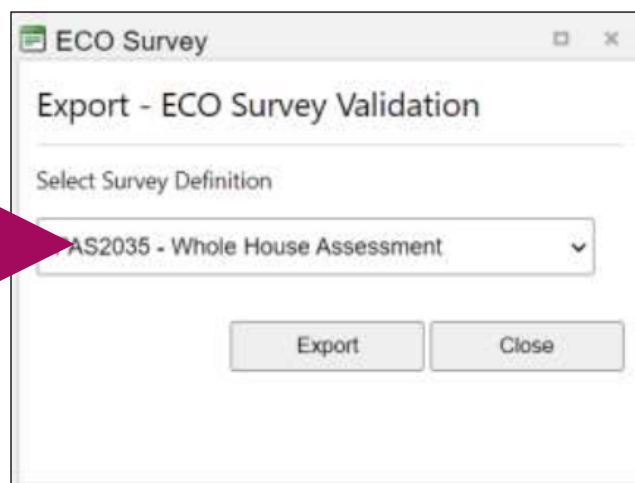
Demonstration

The demonstration will show how to:

- 1 Navigate to the 'Validation Export' button
- 2 Select the correct template and export the data
- 3 View the export sheet

Tasks

- Export the validation sheet
- View the survey data



Lifespan Housing – RdSAP & Occupancy Assessments

Overview

The energy and occupancy data will be available within the RdSAP module of Lifespan Housing. Energy data from here can be viewed, edited and calculated prior to lodging the EPC.



Demonstration

The demonstration will show how to:

- 1 Navigate to the energy & occupancy assessment data
- 2 View, edit and calculate the assessments

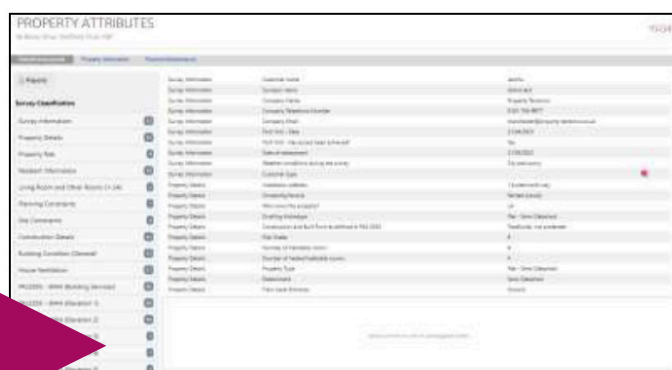
Tasks

- View the survey data
- Edit and calculate an RdSAP and occupancy assessment

Lifespan Housing – Housing Assessment

Overview

The collected survey information is stored within the 'Property Attributes' module and can be viewed alongside the existing planned maintenance information for the selected property. This is an interactive view of the survey data, enabling you to filter down to specific information and view any associated comments and photographs



PROPERTY ATTRIBUTES			
Category	Attribute Name	Value	Action
Survey Information	Survey Information	Survey Date	2024-03-15
	Survey Information	Survey Time	10:00 AM
	Survey Information	Survey Location	123 Main Street
	Survey Information	Survey Type	Visual Inspection
	Survey Information	Survey Status	Completed
	Survey Information	Survey Notes	Minor issues noted during survey.
	Survey Information	Survey Photos	10
	Survey Information	Survey Comments	2
	Survey Information	Survey Attachments	5
	Survey Information	Survey Reports	1
Planned Maintenance	Planned Maintenance	Next Service Due	2024-06-01
	Planned Maintenance	Service Type	Annual Inspection
	Planned Maintenance	Service Status	Upcoming
	Planned Maintenance	Service History	2023-03-15
	Planned Maintenance	Service Location	123 Main Street
	Planned Maintenance	Service Notes	Check for leaks and water damage.
	Planned Maintenance	Service Photos	3
	Planned Maintenance	Service Comments	1
	Planned Maintenance	Service Attachments	1
	Planned Maintenance	Service Reports	0

Demonstration

The demonstration will show how to:

- 1 Navigate to the housing survey data
- 2 Filter to specific elements within the survey
- 3 View associated comments and photographs

Tasks

- View the housing survey data

Reporting - Static Reports

Overview

Various static reports are available from Lifespan which give you an output of data for individual or selected properties following a set template. The exports are located across a number of modules dependant on what information is required.

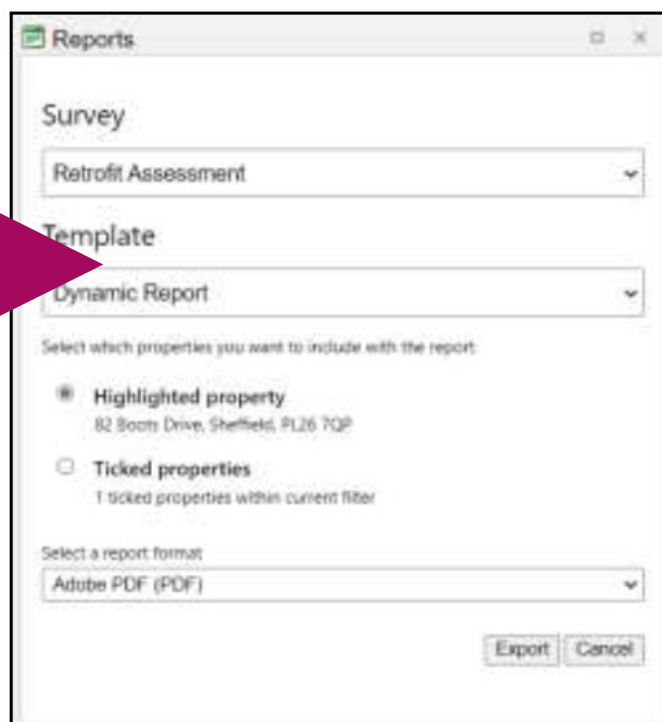
Demonstration

The demonstration will show how to:

- 1 Navigate to each of the report output locations
- 2 Extract reports for single and multiple addresses
- 3 View associated comments and photographs

Tasks

- Export a retrofit assessment report
- Export the EPC data for a chosen property
- Export the Occupancy Assessment report for a chosen property



Reporting – Reports Wizard

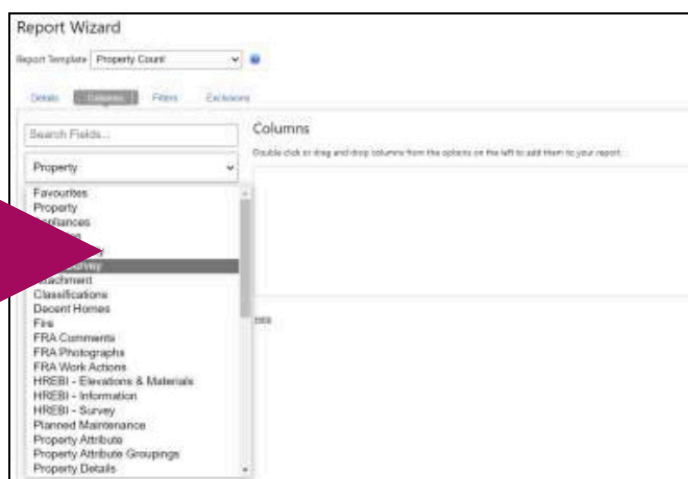
Overview

Custom reports can be created within the Lifespan Reports Wizard to include any of the fields captured during the survey. This covers each of the modules to enable the user bespoke reporting,

Demonstration

The demonstration will show how to:

- 1 Open the reports wizard and locate the relevant fields from the survey
- 2 Create a custom report on the housing survey data
- 3 Create a custom report on energy and occupancy data



Tasks

- Create a custom report to include data collected within the housing survey
- Create a custom report to include data collected within the occupancy assessment