Lifespan Web User Manual

Version 0.16

Contents

1. Logging In

1. Open your web browser and navigate to Lifespan Housing Web: www.pt-lifespan.com/LifespanWeb

2. Enter your username and password and click ‘Login’.

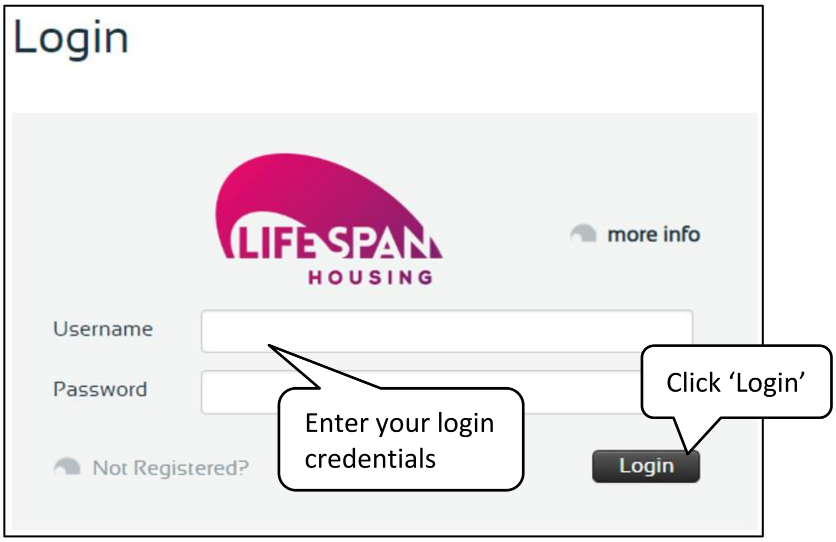


Figure 1: logging in

2. Navigation

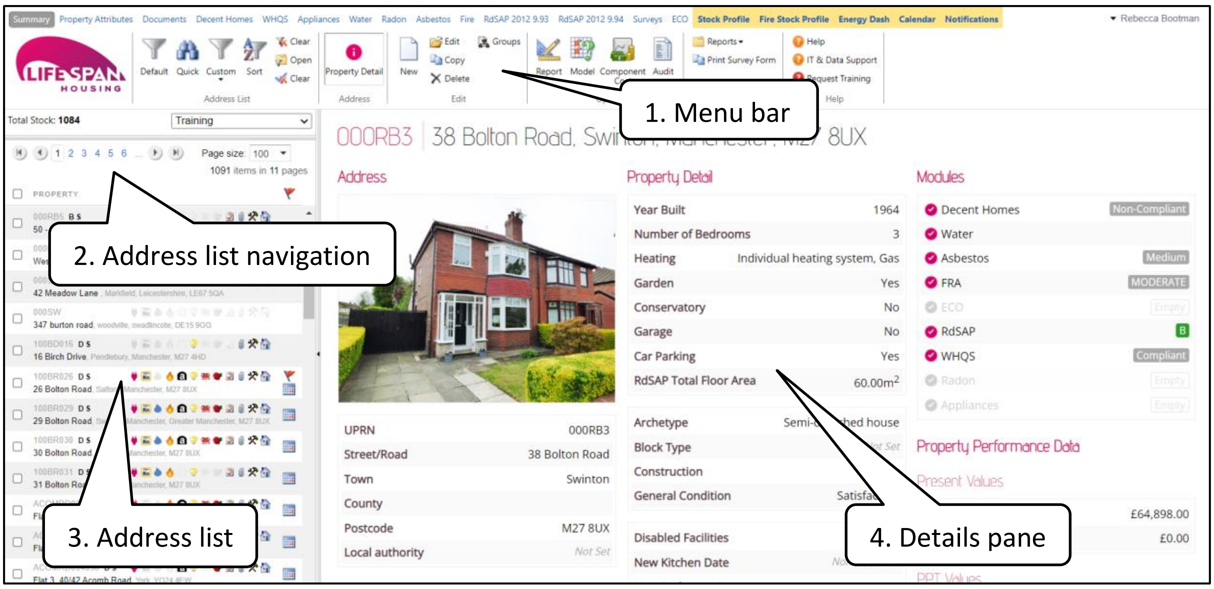


Figure 2: navigating Lifespan

2.1 The Menu Bar

The menu bar allows you to navigate to each module, select options within the module and use the filters to narrow down the properties contained in the address list. Some of the function buttons are available in every module, whereas others change dependent on what information and tools are required.

Select a module by clicking on the applicable heading at the top of the menu bar. The modules displayed are linked to your account permissions.

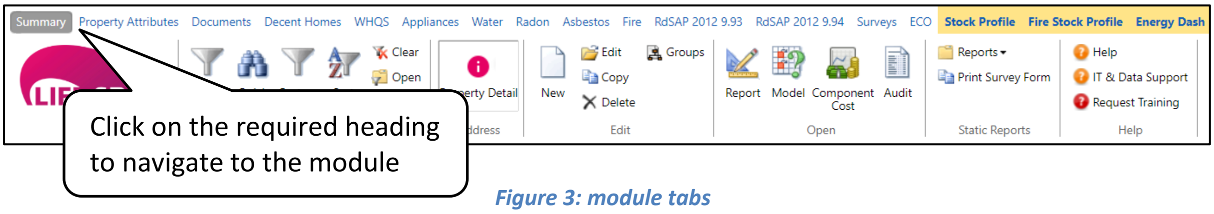


Figure 3: module tabs

Filters are available in each module, allowing you to narrow down your address list and access the information you need. The filter buttons are within the 'Address List' section of the menu bar.

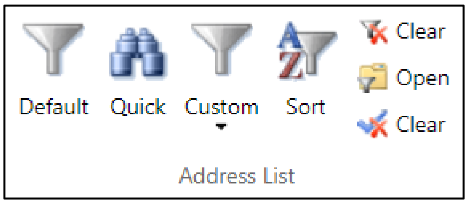


Figure 4: filter options

The 'Edit' section of the menu bar changes dependent on which module you are in. It provides all the tools required to create new, edit and delete existing data.

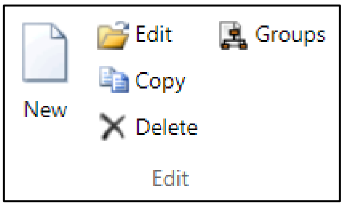


Figure 5: summary module edit buttons

2.2 The Address List

The address list shows all the properties that satisfy the current filter. If no filter has been selected, all properties will appear in the address list.

The current property is the one highlighted in orange. To select a single property, click on the address.

Each address has a tick box to the left of the property name used for filtering purposes, bulk updates and reporting. Tick the box next to any individual property to select/ deselect it or click the tick box at the top of the list to select all properties in the current filter.

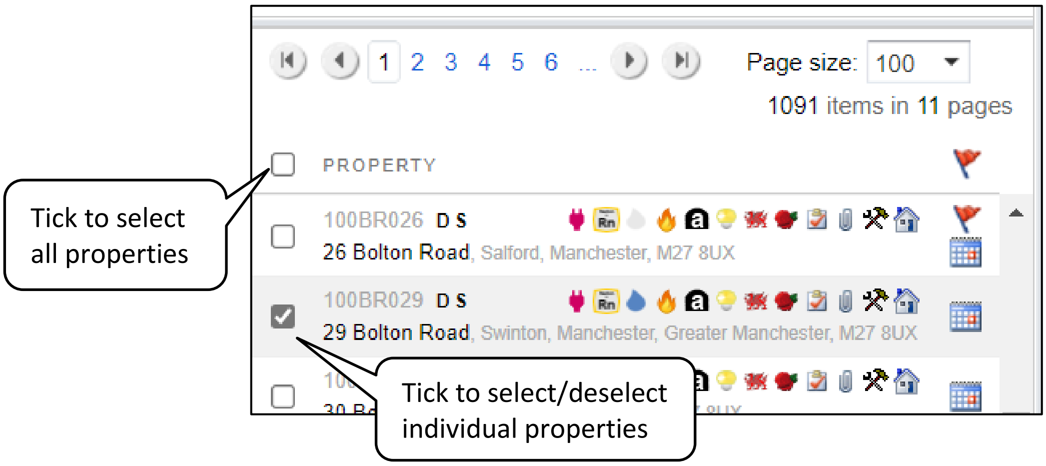


Figure 6: selecting properties

Each property has a set of icons to the right of the UPRN. Icon meanings are given below:

	Appliances
Rn	Radon
	Water
	Asset Liability Register
XB	Ecohomes XB
	Fire
a	Asbestos
	Energy
	SQHS
	WHQS
	Decent Homes
	Tasks
	Documents
	Planned Maintenance
	Property Attributes
	Asbestos Risk
	Calendar

Figure 7: icon descriptions

The icon will be displayed in colour if there is existing data within this module for the selected property or greyed out if no data is present.

2.3 The Details Pane

Like the menu bar, this area changes according to which module is selected to show all relevant information for the currently selected property. Depending on the module selected, there may also be additional tabs, function buttons or interactive elements within the display.

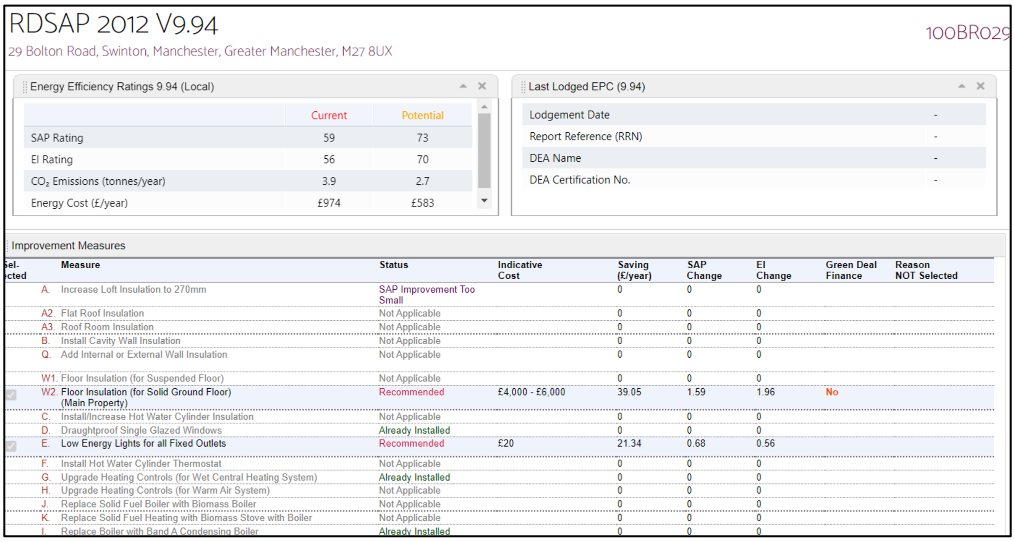


Figure 8: 'RdSAP 2012' module details pane

2.4 Address List Navigation

If there are many properties in the current filter, they are split into pages. The navigation bar allows you to navigate through the pages.

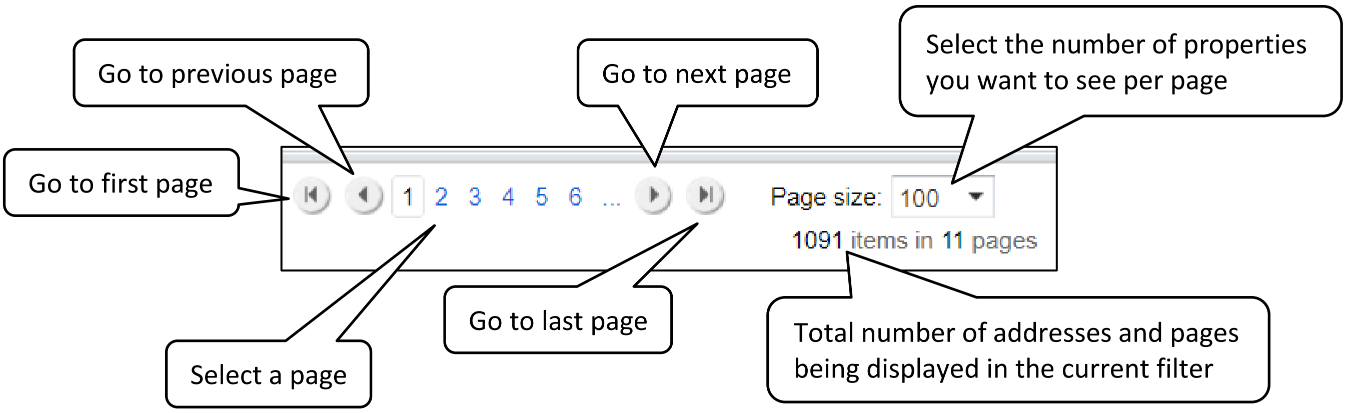


Figure 9: address list navigation

Navigate through the pages by using the previous, first, next or last page buttons or by clicking on a page number directly.

3. Filters and Groupings

There are two ways to use filters in Lifespan: quick filters and custom filters.

3.1 Quick Filters

To use a quick filter, click on 'Quick' on the menu bar.

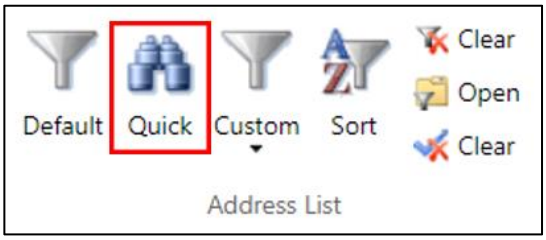


Figure 10: quick filter button

The following window will appear.

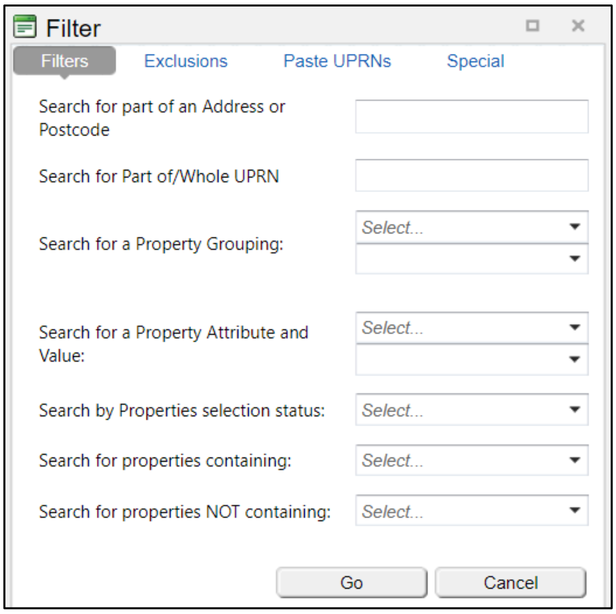


Figure 11: quick filters window

<u>Filters:</u>

Search for part of an address or postcode
You can type part of an address or postcode in here and all properties containing the text will be returned.

Search for part of/whole UPRN
Type part of or a full UPRN in this box and all properties containing the text will be returned.

Search for a property grouping
Select a property grouping from the first drop down followed by a value from the second.

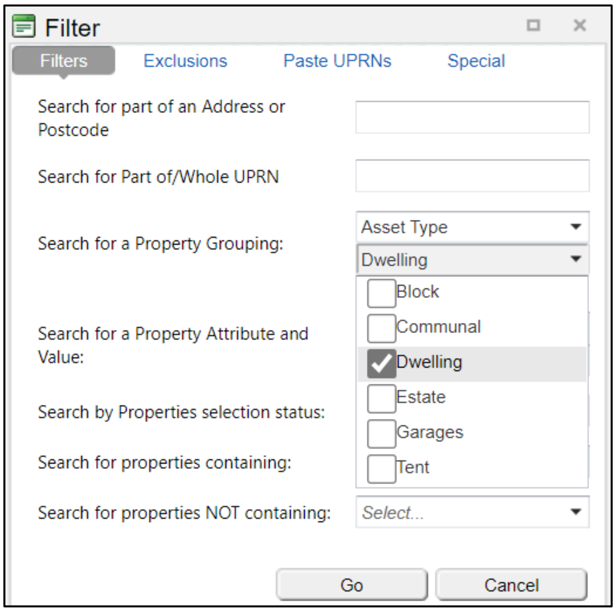


Figure 12: filter by property grouping

Search for a property attribute and value:
Select a property attribute from the first drop down followed either by selecting a value from the second drop down or by entering a value in the second box.

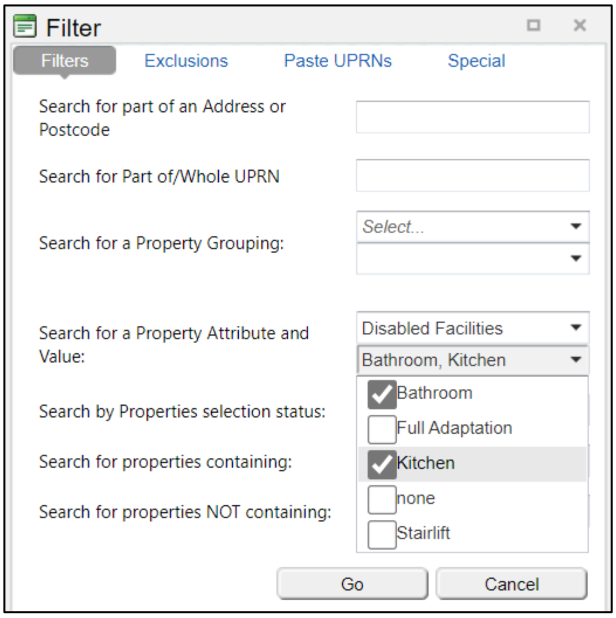


Figure 13: filter by property attribute and value

Search by properties selection status:
Use this drop down to choose either 'selected' or 'unselected' properties. The drop down will only be active if properties are selected in the address list.

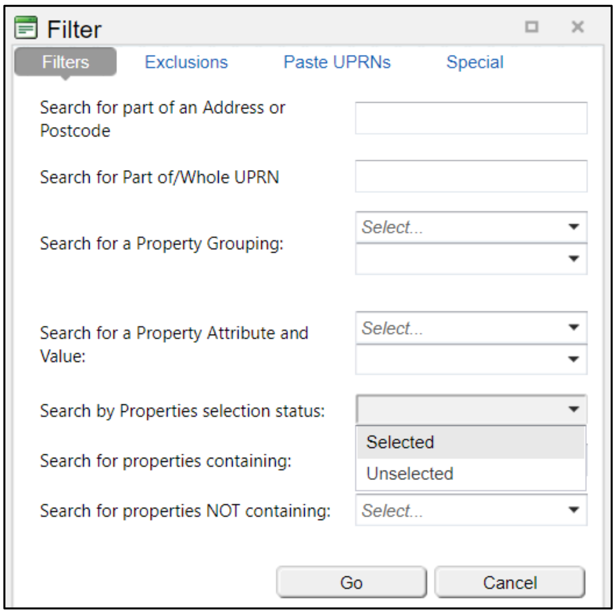


Figure 14: filter by property selection status

Search for properties containing/not containing:
Click on the drop down and tick the boxes relating to the data you wish to filter on. In the below example, only properties with a Decent Homes assessment will be shown.

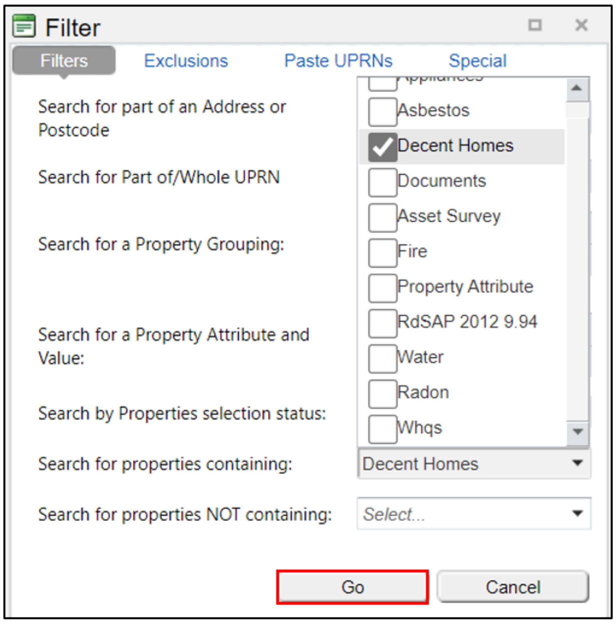


Figure 15: filter by containing/not containing

After selecting the appropriate filter, simply click 'Go'.

Exclusions:

By default, all asset types and survey types will be included and all sold, demolished, lease expired etc. properties will be excluded from your address list.

Untick any of the boxes under the asset types or survey types drop downs to **exclude** them from the filter. For example, unticking the 'Block' option will exclude all blocks from the results.

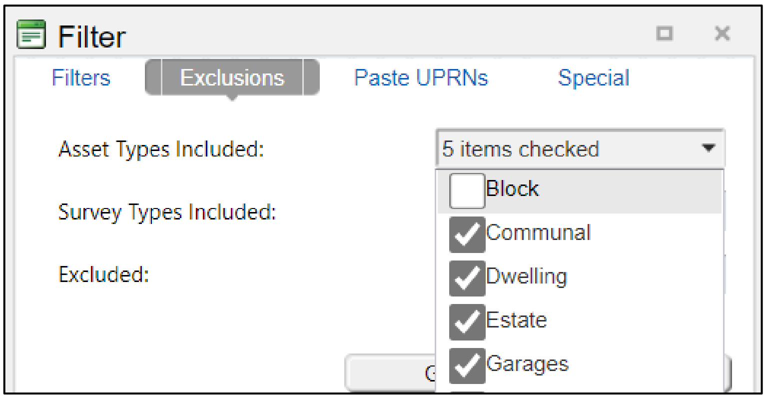


Figure 16: filter exclusions

Use the last drop down to select other options to exclude. For example, unticking 'Sold' and 'Demolished' will **include** these properties in your address list. Click 'Go' once you have selected the required options.

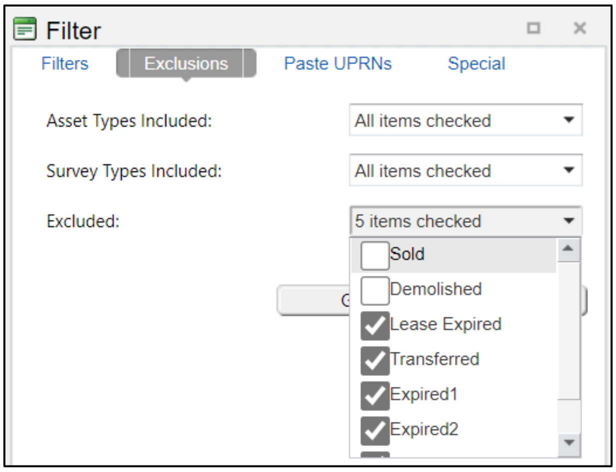


Figure 17: other exclusions

Paste UPRNS:

Use this tab to paste in a list of UPRNs from, for example, a spreadsheet or word document. Paste in or type the UPRNs each on a new line and click 'Go'.

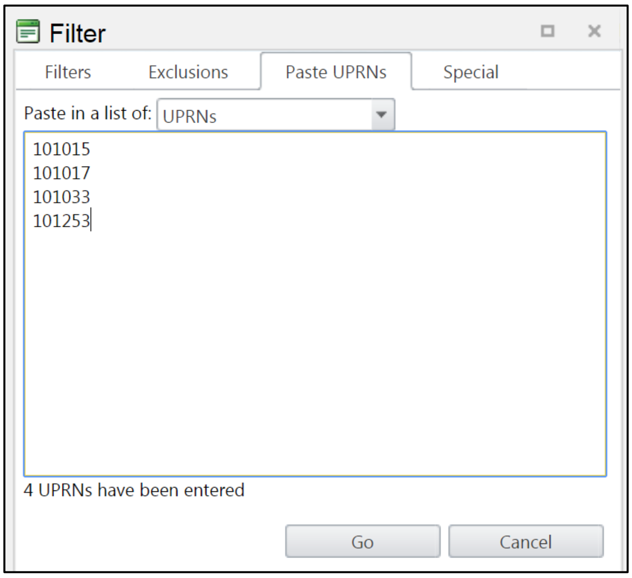


Figure 18: pasting UPRNs

Special:

This tab holds permanent filters that can be written into Lifespan by the developers. Often these are commonly requested filtering options. Select the filter to apply and click 'Go'.

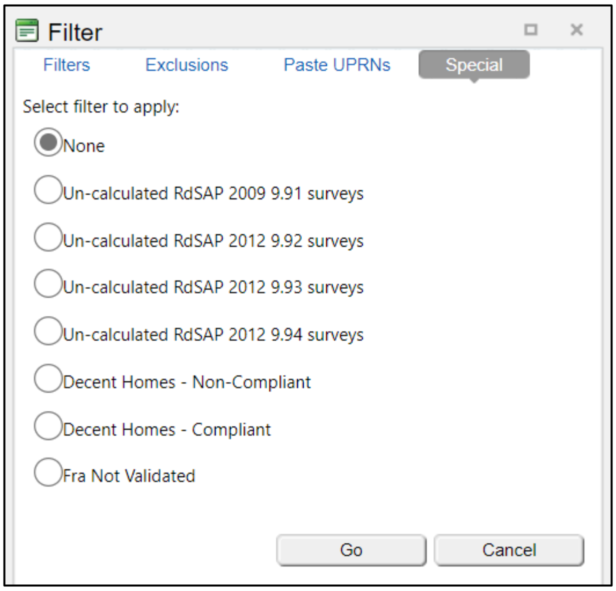


Figure 19: special filters

3.2 Custom Filters

1. To start using custom filters, click on 'Custom' in the menu bar.

This example will show how to filter for properties with a SAP rating of 62 or higher **and** CO^2 emissions of 4 tonnes or less per year.

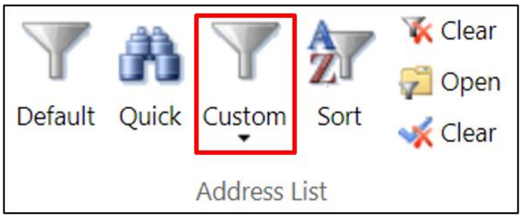


Figure 20: location of the custom filter button

2. Typing a name into the box allows you to save the filter for future use. Click on 'Add Custom Filter' to begin.

Figure 21: naming the filter

3. Set the criteria of the filter by selecting from the drop-down menus.

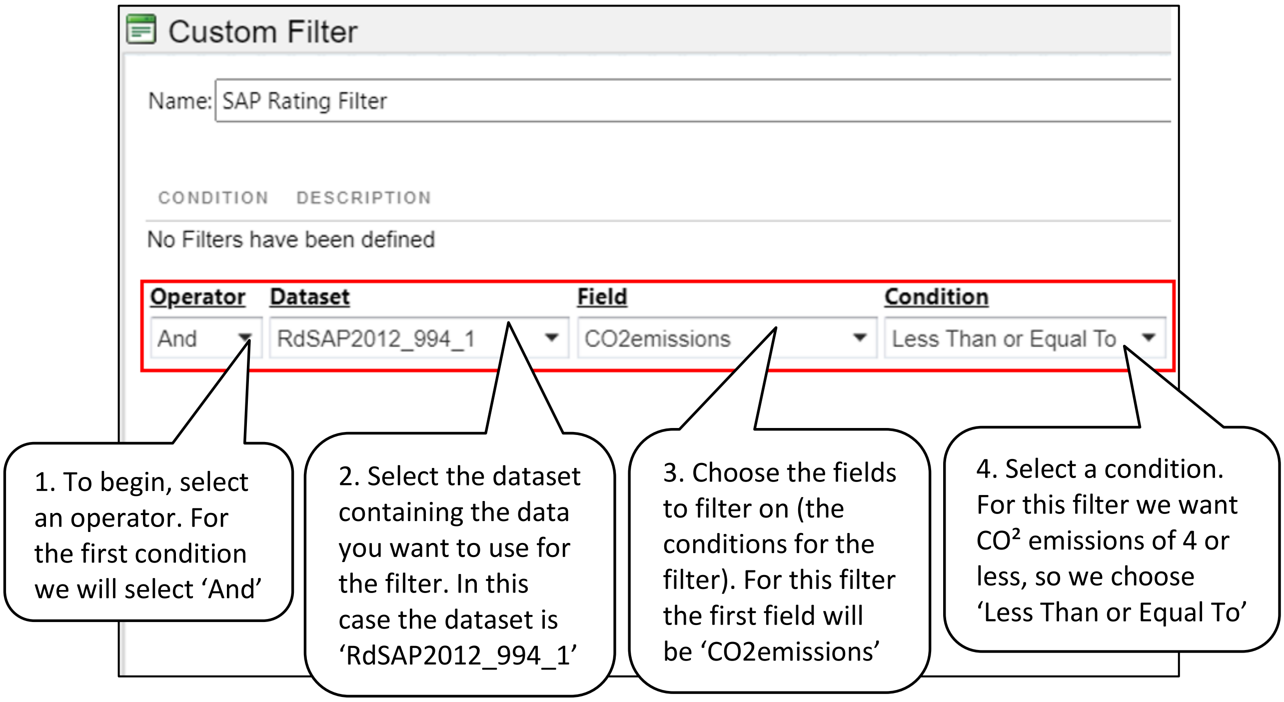


Figure 22: custom filters

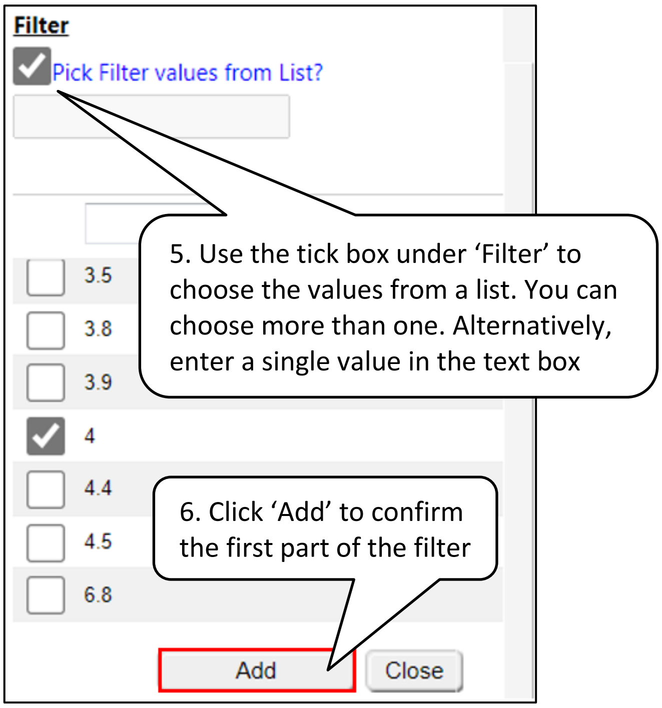


Figure 23: custom filters 2

4. Add further conditions in the same way. In this example, another condition from the same dataset has been added.

CONDITION	DESCRIPTION	
And	CO2emissions Less Than or Equal To: '4'	Delete
And	SAPrating Greater Than or Equal To: '62'	Delete

Figure 24: filter conditions

Additional custom or quick filters may be added in the same way.

5. If you wish to save the filter, click on the 'Save' button. Run the filter by clicking 'Apply Filter'.

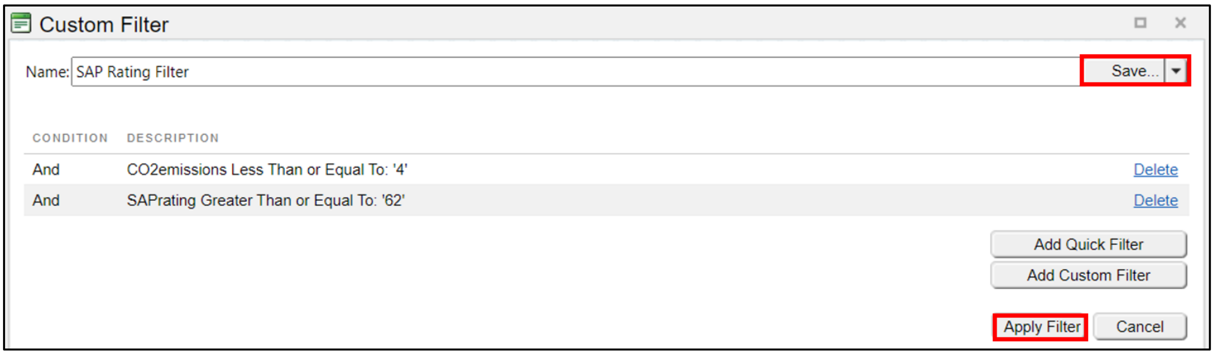


Figure 25: saving and running a filter

To open a previously saved filter, click on 'Open' on the menu bar, choose the filter, and click 'Apply'.

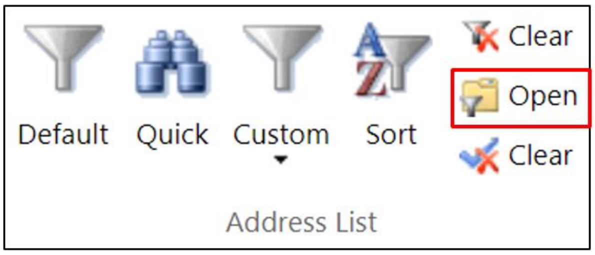


Figure 26: opening a saved filter

To clear a filter, click on 'Clear' in the menu bar.

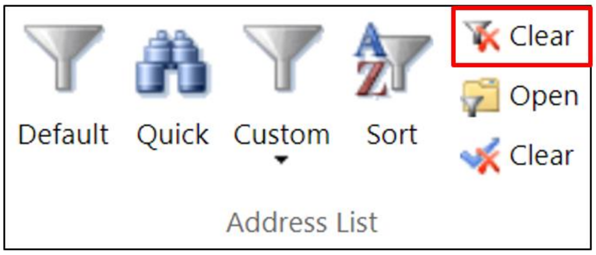


Figure 27: clearing a filter

3.3 Groupings

Groupings are a way of categorising certain elements of data so you can then search and report via the grouping rather than having to specify a number of criteria to achieve the same result.

It's not mandatory to have groupings set, however the relevant searches and report outputs will be dependent on the information provided so the more data you can provide, the more accurate these will be.

There are three types of data which can be grouped within the software, these are properties, attributes and works.

Groupings are customer defined and form part of the system administration set up for your company account using import/export sheets. For guidance on how to set up groupings, please refer to section **6.2 Analysis Groups**.

3.3.1 Property Groups

Property groups can be accessed via the 'Summary' module, where you can assign specific properties to a group.

1. If you want to assign the same group information to multiple properties, first either apply a filter or tick the addresses you want to include. For an individual address, select it from the property list on the left of the screen.

2. Click on the 'Groups' button under the 'Edit' section within the 'Summary' module.

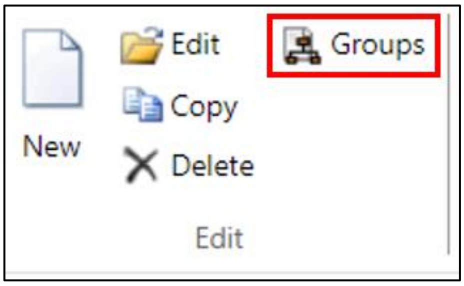


Figure 28: property groups

This will open a new display including all groups assigned to the selected property. If existing groups are assigned these will be displayed, enabling you to either edit those existing or add in a new grouping.

3. The group headings are displayed on the left and a pick list of values is available for each. Select the relevant option from the drop-down lists.

NOTE A 'save' icon will be displayed next to any grouping where a new value is selected, this is to indicate which values will be updated once the information is saved. All existing values will remain unchanged for any property you are saving against.

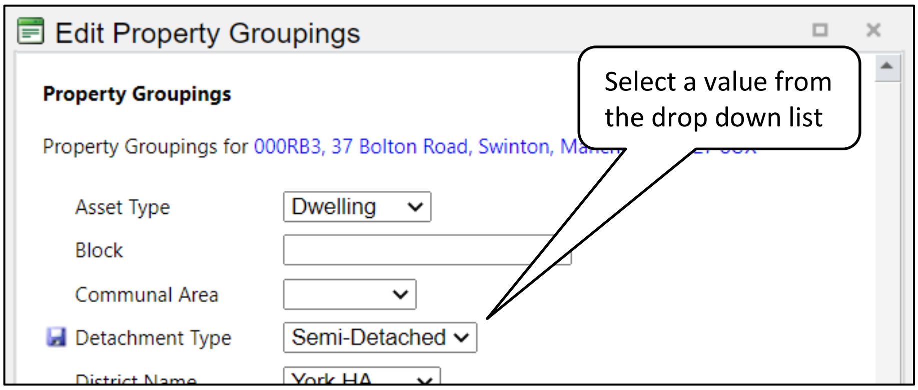


Figure 29: edit property groupings

4. There are three save methods to choose from, depending on if you want to update the new grouping values for one or multiple properties. Click 'Save' and select the relevant option.

   - **For current property**
     This will only update the changed values for the current (highlighted) property.

   - **For all properties in filter**
     This will update the changed values for all properties in the current filter.

   - **For selected properties**
     This will update the changed values for all selected (ticked) properties.

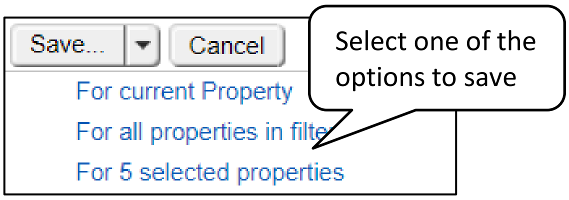


Figure 30: save options

3.3.2 Attribute Groups

The attribute group headers and associated attributes are set using the import/export sheets as part of the system design so there is no further action required within the user interface to create these groups. Once an attribute is assigned to a property, if it forms one of the groups, it will appear in the applicable section within the 'Property Attributes' module under the 'Property Information' tab.

In the example below, we have 5 separate groups which cover all attribute types. The number of attributes within each group is listed to the right and can be selected to filter to the applicable attributes.

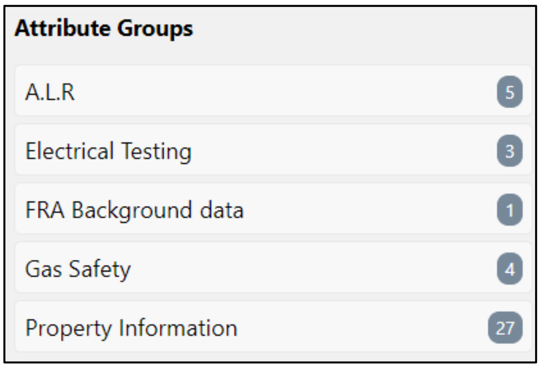


Figure 31: attribute groups

Some of the property groupings also influence how data is displayed in other modules. i.e. Attributes have to be included in the 'FRA Background data' group in order to be displayed in the 'General Information' section in the Fire Module 'Fire Risk Management' page.

For further guidance on using attributes within the software, please refer to section **5. Property Attributes.**

3.3.3 Work Groups

Work groups are used to assign the rate classification links which influence the maintenance data collection on the mobile software.

There is no visibility for work groups within the Lifespan Web user interface, they are used in the background to group rates of a specific type i.e., Kitchen, Bathroom, External Fabric, Roof Space etc. under the relevant heading for easier inputting during surveys.

For guidance on setting up work groups via the import/export sheets, please refer to section **6.7.2 Analysis Groups**. Alternatively, please refer to the Lifespan Mobile manual for information on the mobile software data collection process.

4. The Summary Screen

Click on ‘Summary’ on the menu bar. The summary screen provides an overview of the selected address.

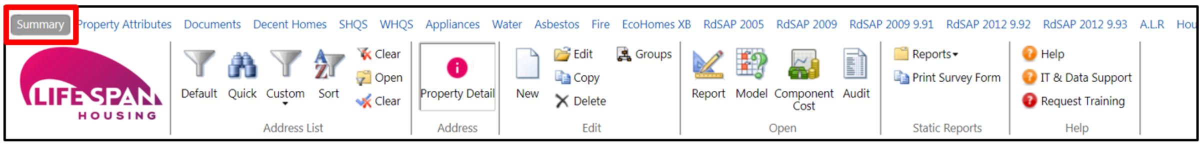


Figure 32: summary button

Information is displayed within separate sections including the address, location, property details, survey, modules and property performance data. There is also an area containing links to direct you to alternative Lifespan software products.

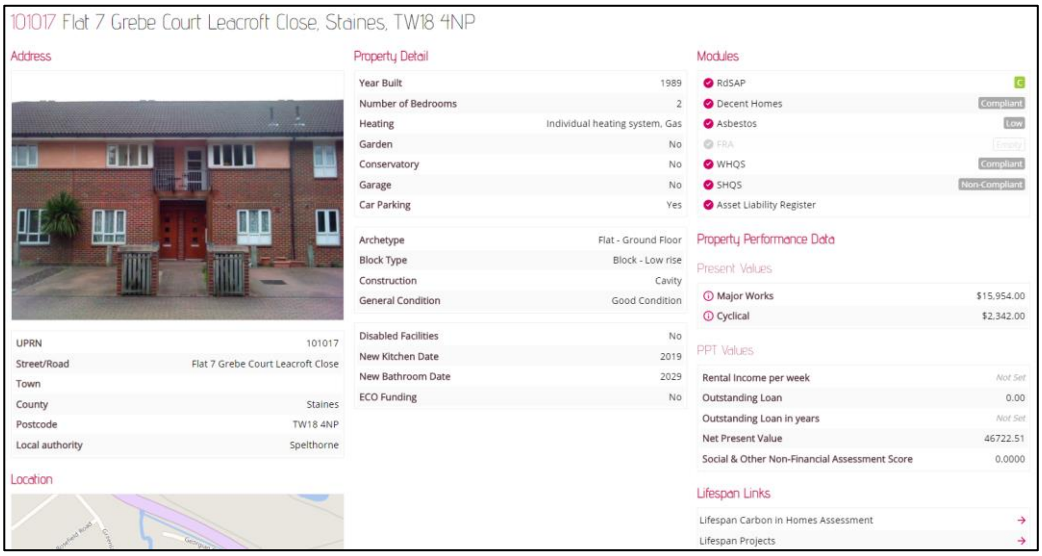


Figure 33: Summary screen overview

To download a report of the data contained within the summary module, click the ‘Standard Property Report’ button at the bottom of the screen to generate a PDF output.

Figure 34: standard property report button

There is a Property Detail button on the summary screen, which once pressed will hide the main display and instead show data within widget format.

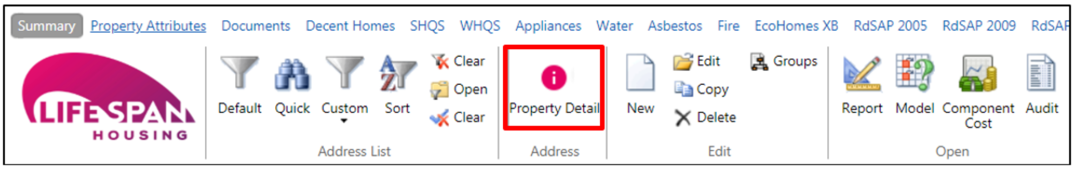


Figure 35: Property detail button

Widgets may be moved around by clicking and dragging the title bar. The dotted line shows the placement of the widget. They can also be collapsed/expanded or closed by pressing the relevant buttons.

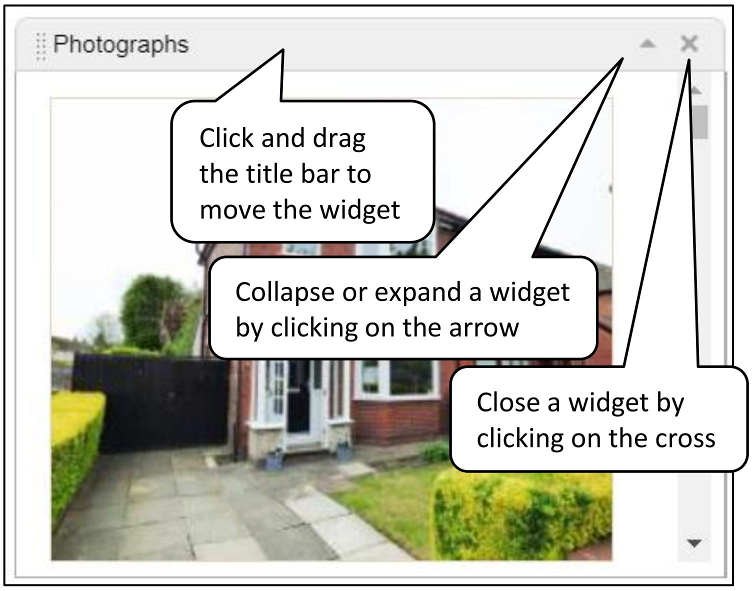


Figure 36: widget controls

To add new widgets or to replace a closed widget, select the desired widget from the drop down, click on 'Add Widgets' and drag the widget into place on the screen.

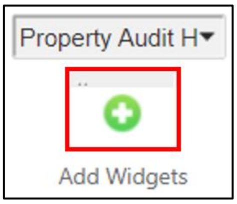


Figure 37: adding a widget

You may notice some of the widgets have hyperlinks in their title bar. Clicking these links will download the widget's data in spreadsheet format.

Figure 38: click the link to download the data

5. Property Attributes

Click on 'Property Attributes' on the menu bar.

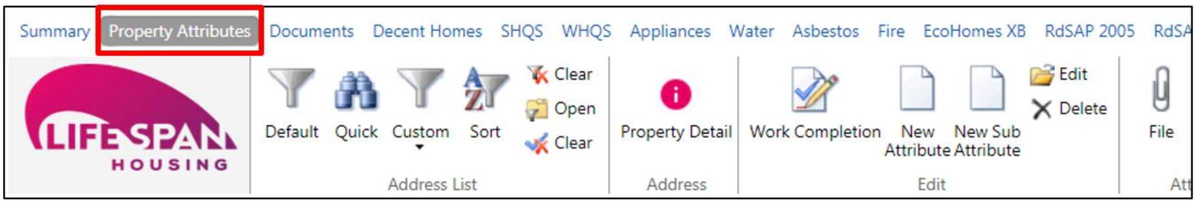


Figure 39: property attributes button

The property attributes module contains a number of tabs which include survey data, HHSRS, property information attributes, planned maintenance and service charges relevant for the selected address.

Tabs are greyed out where no data is present or shown in blue if data is available. Click on the heading to review the information on the main display.

5.1 Retrofit Assessment

If a retrofit assessment has been completed for a property, the survey data will be present within this tab.

1. Select the 'Retrofit Assessment' heading to display the survey data.

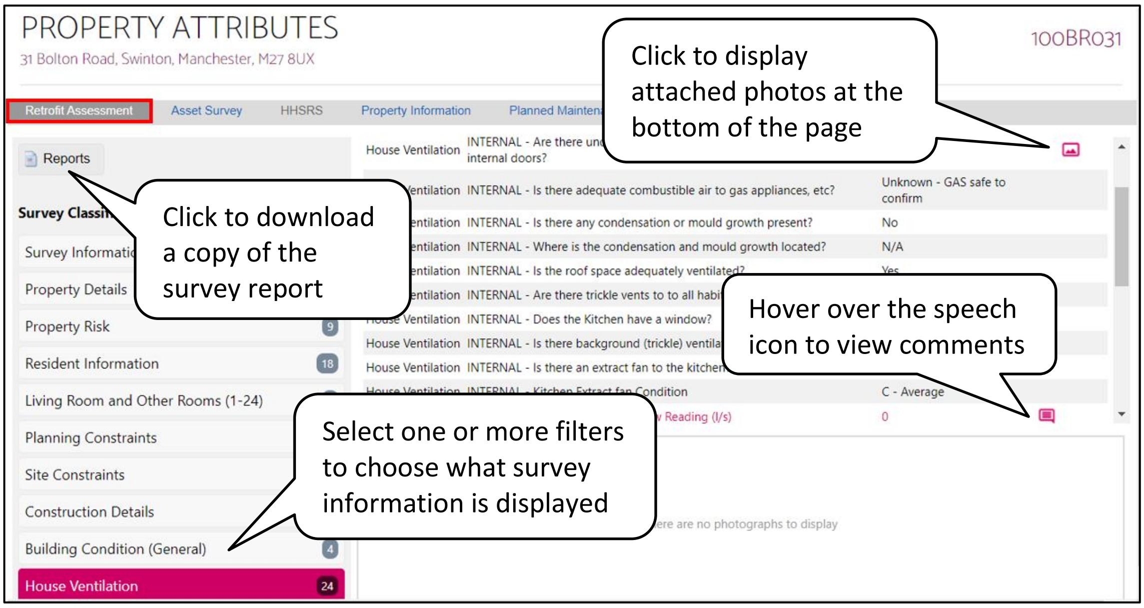


Figure 40: retrofit assessment

2. Use the filters on the left to customise what survey information is displayed. You can click to highlight one or multiple sections to limit the questions you see or select all/none to show the full dataset.

3. The photo icon appears next to any question containing an image. Click on this icon to display the photographs at the bottom of the page underneath the question list.

4. The speech icon appears next to any question containing a comment. Hover over the icon to see the comment details.

5. To download a copy of the report, click the 'Reports' button above the list of survey classifications.

NOTE Any comments are stored in the background, so although they are available via the user interface, they will not be included in the report output.

Please refer to section **16. Surveys** for guidance on inputting and editing survey data.

5.2 Asset Survey

If an asset survey has been completed for a property, the survey data will be present within this tab.

1. Select the 'Asset Survey' heading to display the survey data.

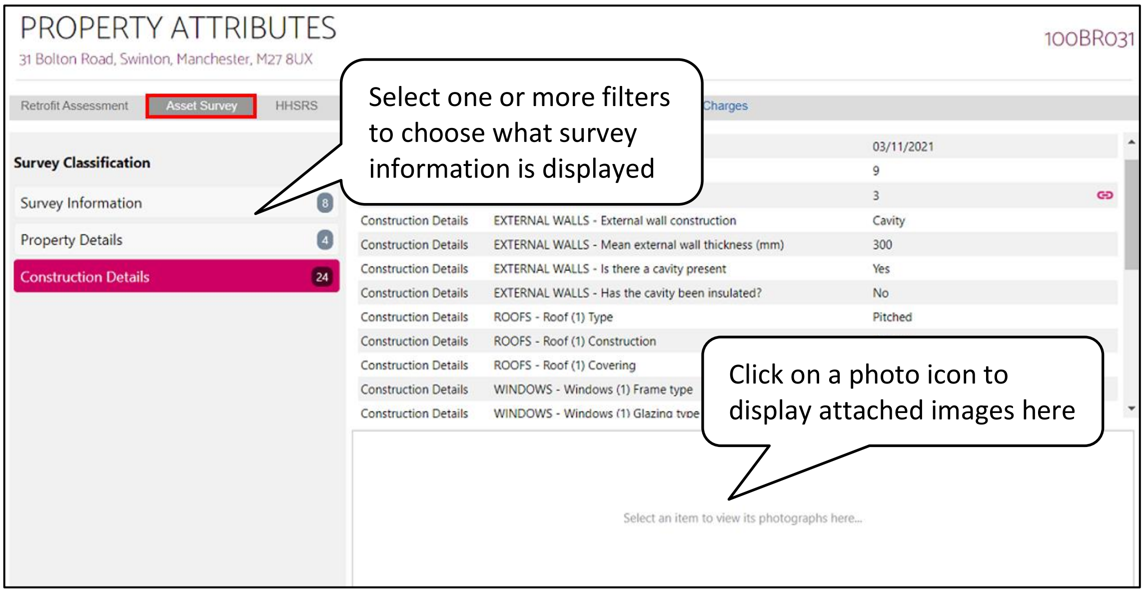


Figure 41: asset survey

2. Use the filters on the left to customise what survey information is displayed. You can click to highlight one or multiple sections to limit the questions you see or select all/none to show the full dataset.

3. The photo icon appears next to any question containing an image. Click on this icon to display the photographs at the bottom of the page underneath the question list.

4. The chain icon appears next to any question which is linked to an existing property attribute.

Please refer to section **16. Surveys** for guidance on inputting and editing survey data.

5.3 HHSRS

If the selected address contains HHSRS information, the data will be present within this tab. Each element of the HHSRS assessment is stored as a separate property information attribute and there is also a link within the 'Decent Homes' module to update as part of this assessment.

1. Select the 'HHSRS' heading to display the survey data.

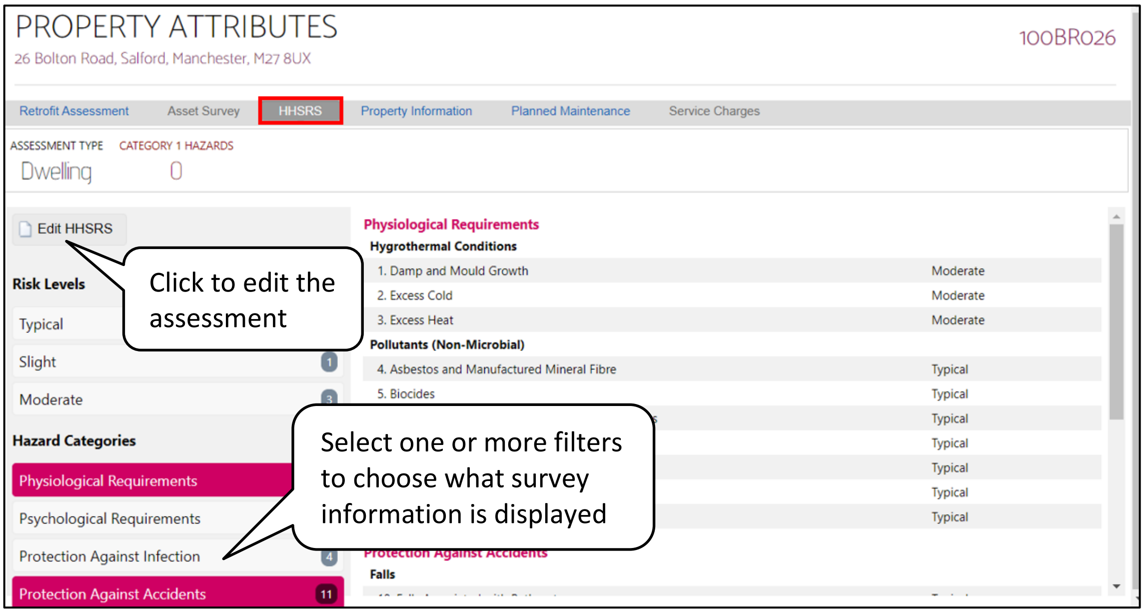


Figure 42: HHSRS

2. Use the filters on the left to customise what survey information is displayed. You can click to highlight one or multiple sections to limit the questions you see or select all/none to show the full dataset. You can choose whether to filter on risk level, hazard category or a combination of both.

3. To edit the assessment, click the ‘Edit HHSRS’ button displayed above the filters. The data will appear in a new window, allowing you to make any changes as required.

4. The assessment type and date are displayed at the top, followed by each hazard category. Use the drop-down menus to select the appropriate option and click ‘Save’ to apply your changes.

5. Next to the top value in each category are arrow buttons which can be used to aid the inputting process. The first arrow will apply the value selected to all questions in the current category and the second arrow will apply this value to the full assessment.

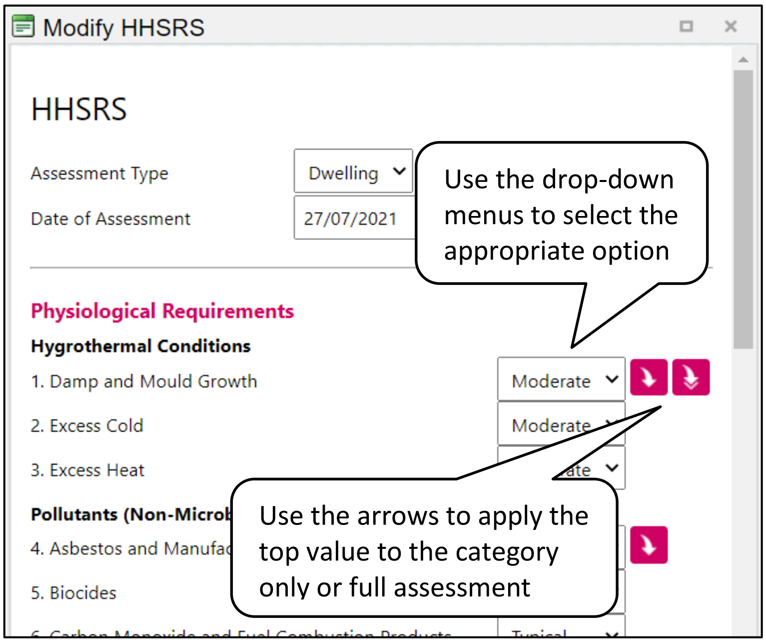


Figure 43: modify HHSRS

5.4 Property Information

The 'Property Information' tab contains all property information attributes for the selected address. This area should be used to store all static elements of a property i.e. an attribute that does not require a work schedule e.g. age band, number of bedrooms etc.

1. Select the 'Property Information' heading to display the attributes.

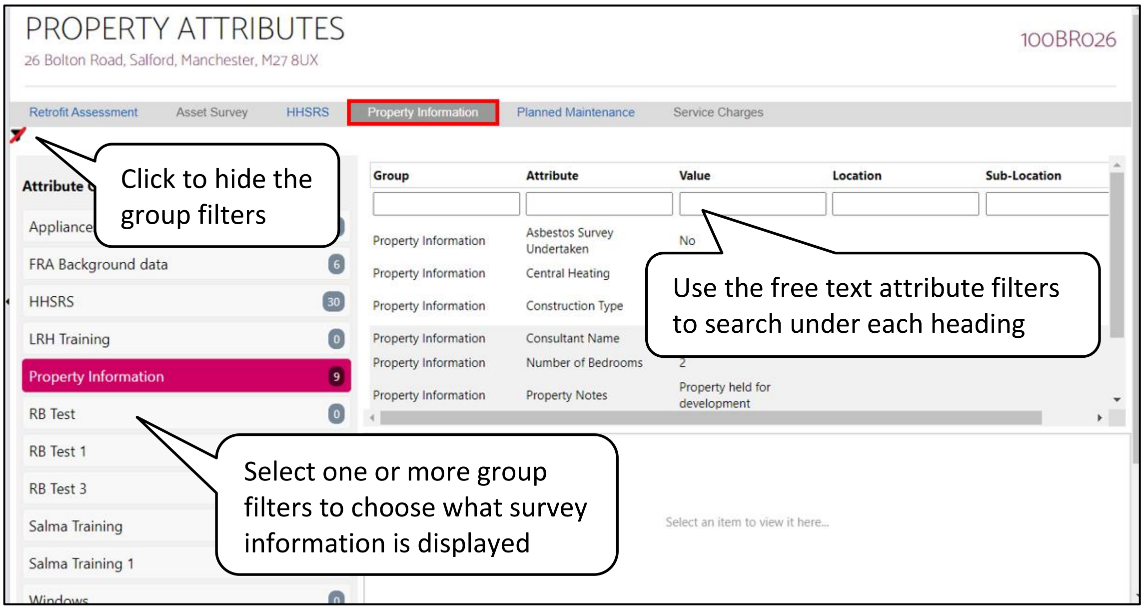


Figure 44: property information

2. Use the group filters on the left to customise which attributes are displayed. You can click to highlight one or multiple sections to limit the attributes you see or select all/none to show the full dataset.

3. Click on the filter icon in the top left of the screen to either hide or show the group filters list.

4. Additional filter options are available under each heading for the elements of the attribute. These are free-text fields, type in a value and press ‘Enter’ on your keyboard to view all applicable attributes.

5.5 Planned Maintenance

The ‘Planned maintenance’ tab contains all property attributes for the selected address which require a maintenance schedule and associated work costs stored against them.

NOTE As soon as you assign a work rate to an existing property information attribute, it becomes a planned maintenance item and the record will automatically be moved from the ‘Property Information’ tab into ‘Planned Maintenance’.

1. Select the ‘Planned Maintenance’ heading to display the attributes. To review the maintenance details for an attribute, select it from the list and the schedule will be displayed at the bottom of the screen.

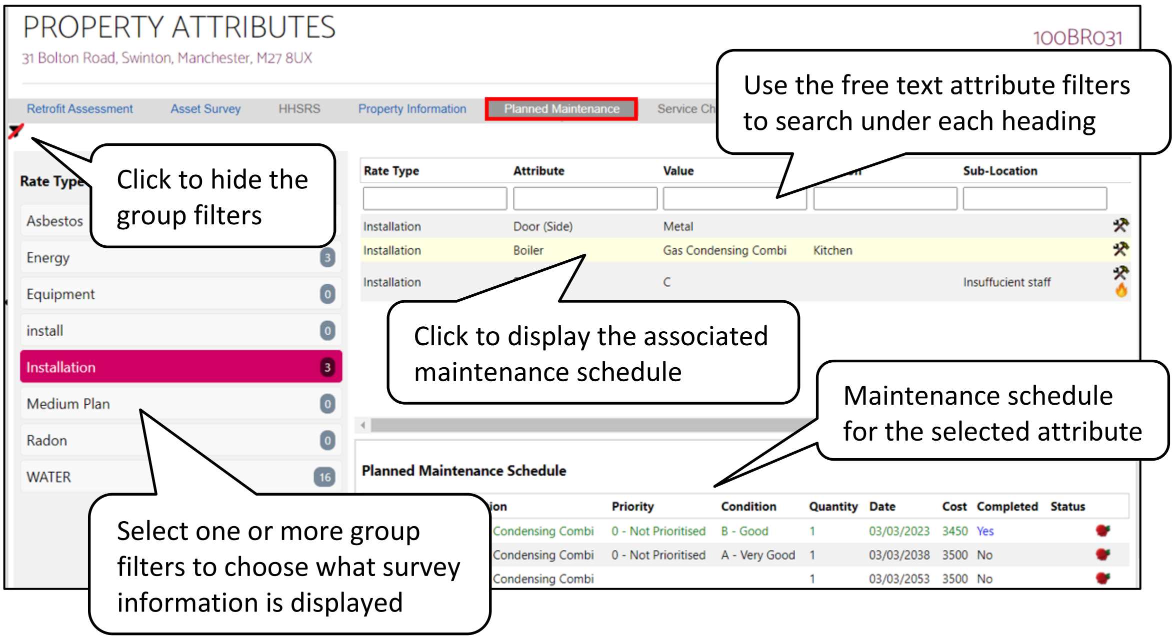


Figure 45: planned maintenance

2. Use the group filters on the left to customise which attributes are displayed. You can click to highlight one or multiple sections to limit the attributes you see or select all/none to show the full dataset.

3. Click on the filter icon in the top left of the screen to either hide or show the group filters list.

4. Additional filter options are available under each heading for the elements of the attribute. These are free-text fields, type in a value and press ‘Enter’ on your keyboard to view all applicable attributes.

5. Icons are displayed to the right of each attribute to provide further information about the component. The spanner and hammer icon show that works are present and module icons will be present if the component is linked with another module via compliance links i.e., fire, asbestos etc. (please refer to section **2.2 The Address List** for the full list of module icons).

6. Once you have selected a property attribute, the maintenance schedule will be displayed below. This provides details of the rate that has been applied to the attribute, along with associated condition, quantity, action date and cost.

7. When a work item has been completed, the applicable schedule will be displayed in green and you will see ‘Yes’ under the completed column.

NOTE The maintenance schedule displays future maintenance items spanning a 50 year period. This is based on the design life for the applied rate. i.e., If your component has a 1 year lifecycle, you will see 50 records in your schedule. If your component has a 25 year lifecycle, you will see 2 records in your schedule - one for each renewal required within the next 50 years.

5.6 Service Charges

If the selected address contains service charge information, the data will be present within this tab.

The service charge information is generally stored under the block and provides the percentage and costings of applicable maintenance data. Similar to the planned maintenance schedule, the data you see here includes the next 50 years of work renewals for the applicable components.

1. Select the ‘Service Charges’ heading to display the information.

   The total number of units and leasehold count per block is displayed at the top of the screen, followed by the maintenance data.

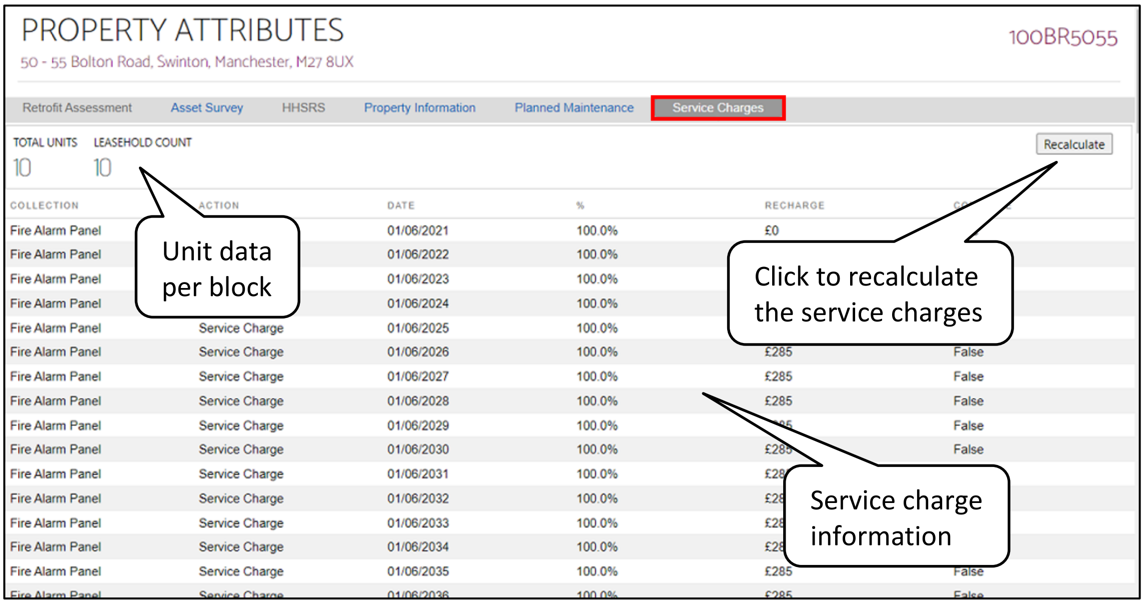


Figure 46: service charges

2. Use the 'Recalculate' button to recalculate the service charge data based on the maintenance information.

5.7 Adding Property Attributes and Works

1. Highlight a property from the address list and click 'New Attribute'

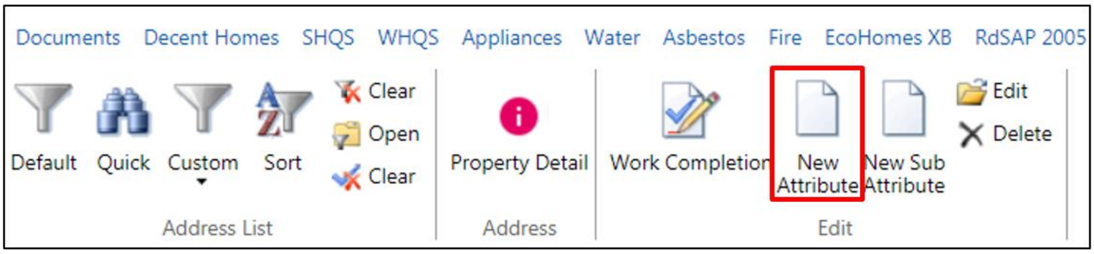


Figure 47: new property attribute button

2. Select an attribute and value from the drop-down menus. Type in a location and a sub-location if required.

NOTE The location and sublocation fields are not mandatory, however they allow you to include further details for the attribute. They can also be used to create a unique attribute in cases where multiples of the same attribute name is required.

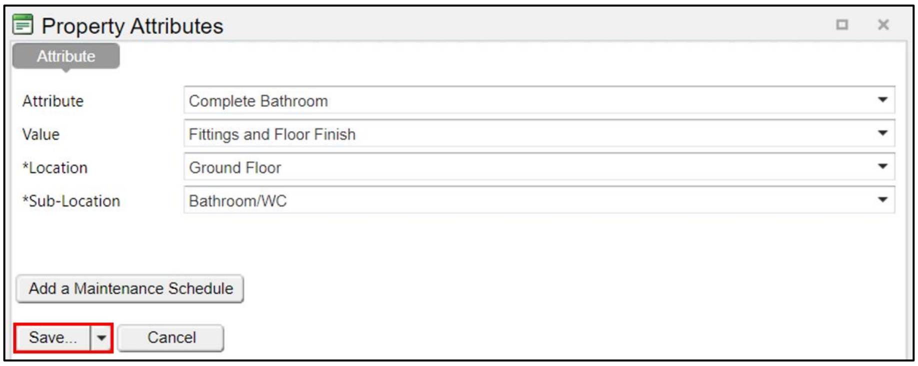


Figure 48: adding a new property attribute

3. If you wish to add a maintenance schedule, click on the ‘Add a Maintenance Schedule’ button. If not, simply press ‘Save’.

4. When you click ‘Add a Maintenance Schedule’, a new tab appears. Click the tab to proceed.

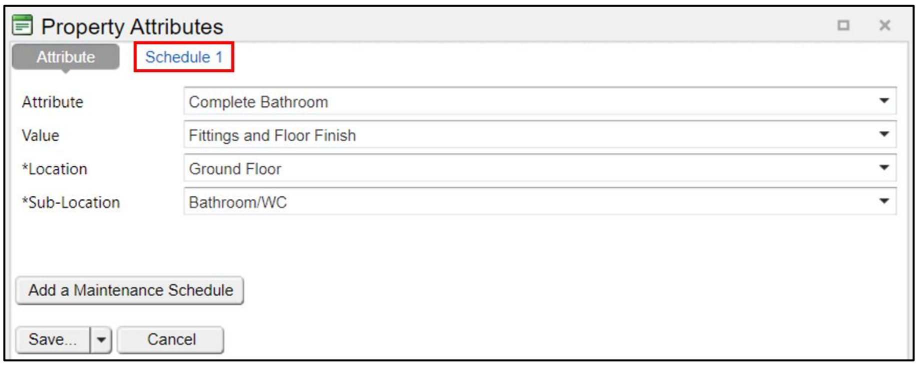


Figure 49: adding a maintenance schedule

5. Select a rate from the drop down. Start typing in the box to search the drop down and return matches.

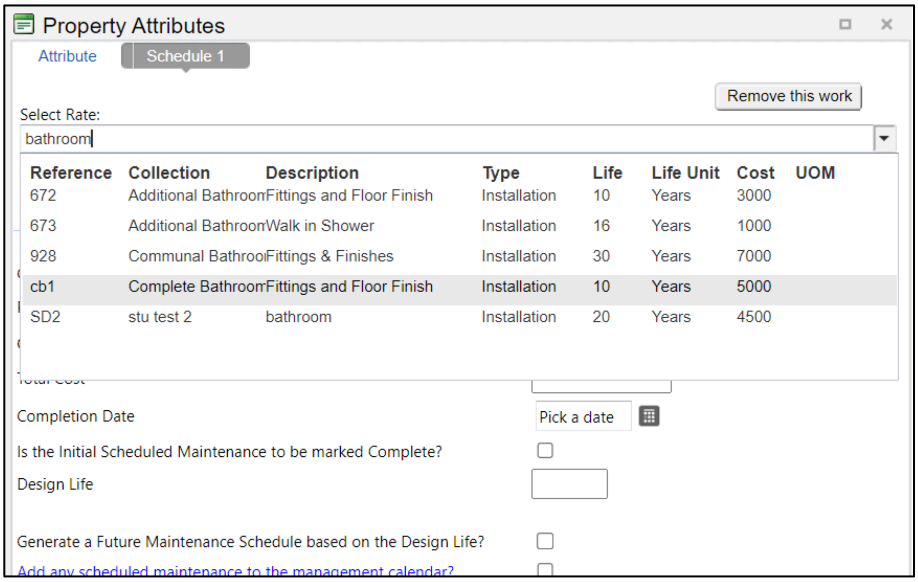


Figure 50: selecting a rate

6. Select a condition and priority from the drop downs.

7. Type in a quantity and the total cost will be automatically generated based on the quantity multiplied by the unit rate cost.

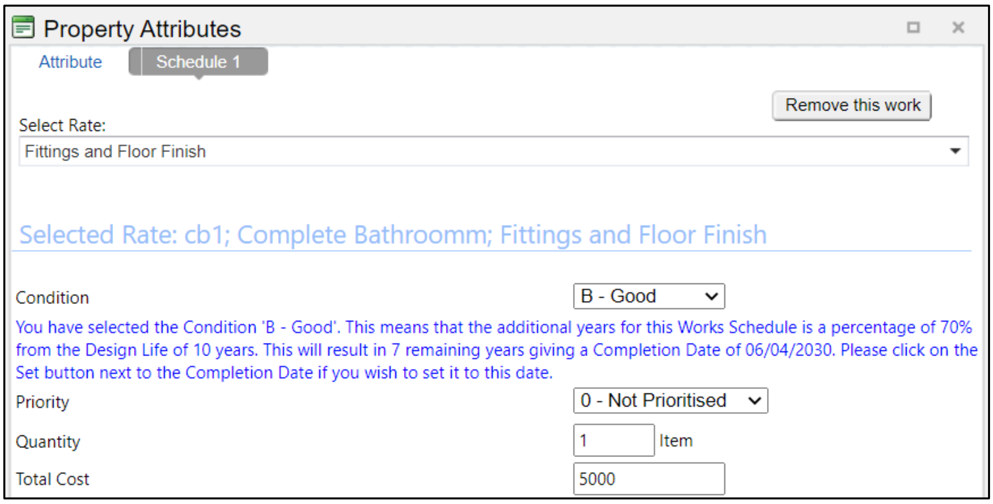


Figure 51: maintenance schedule options

8. Click 'Set' to generate a suggested completion date. You can change this if you'd prefer a different date by clicking on the calendar icon.

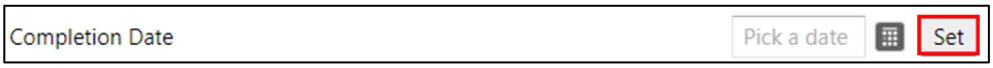


Figure 52: suggested completion date

9. Tick the box to generate a future maintenance schedule based on the design life.

10. Choose to add scheduled maintenance to the calendar by ticking the box.

11. Press 'Save' to finish.

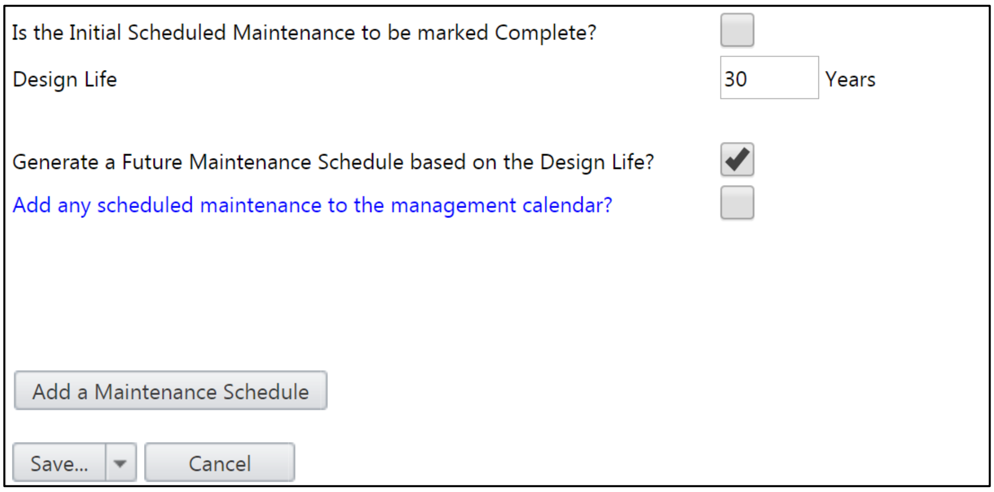


Figure 53: further maintenance schedule options

12. A spanner icon () now appears to the right of the property attribute to indicate the presence of a works schedule.

5.8 Editing Property Attributes and Works

1. Highlight an attribute and click 'Edit'.

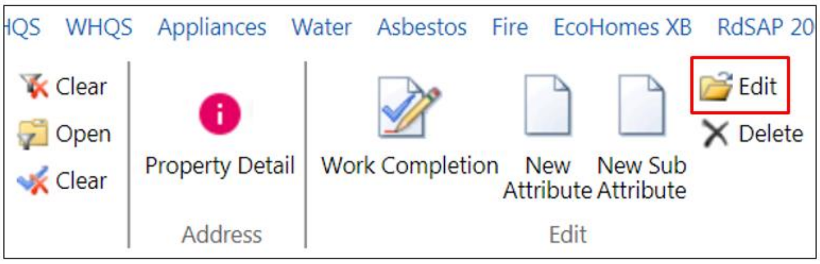


Figure 54: edit attribute button

2. Make the required changes and save.

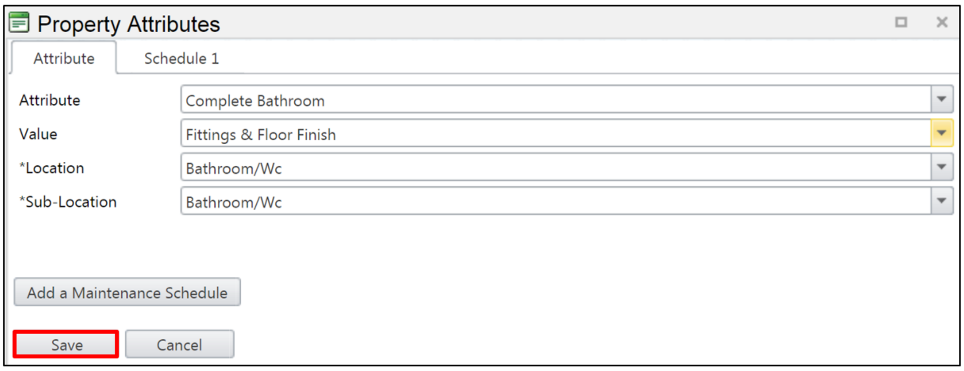


Figure 55: editing a property attribute

5.9 Deleting Property Attributes

1. Select the attribute you want to delete and click 'Delete'.

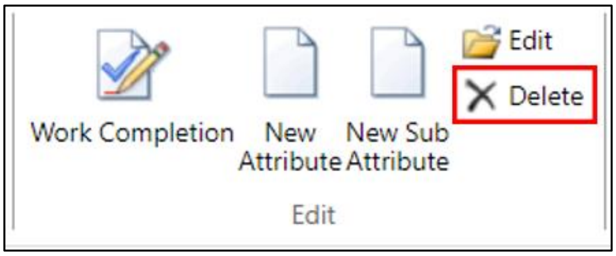


Figure 56: delete property attribute button

2. Confirm the action by pressing 'Delete'.

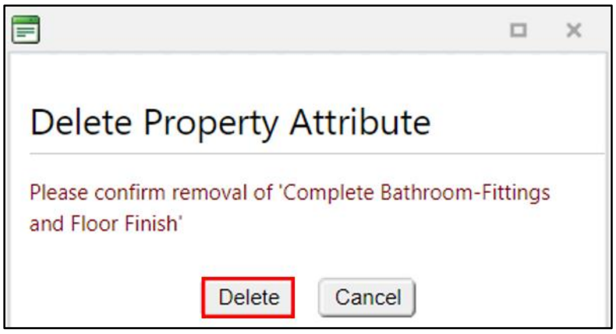


Figure 57: confirm the removal

5.10 Deleting Maintenance Schedules

1. Choose an attribute with works. At the bottom of the screen, right click the schedule and click 'Delete Schedule'.

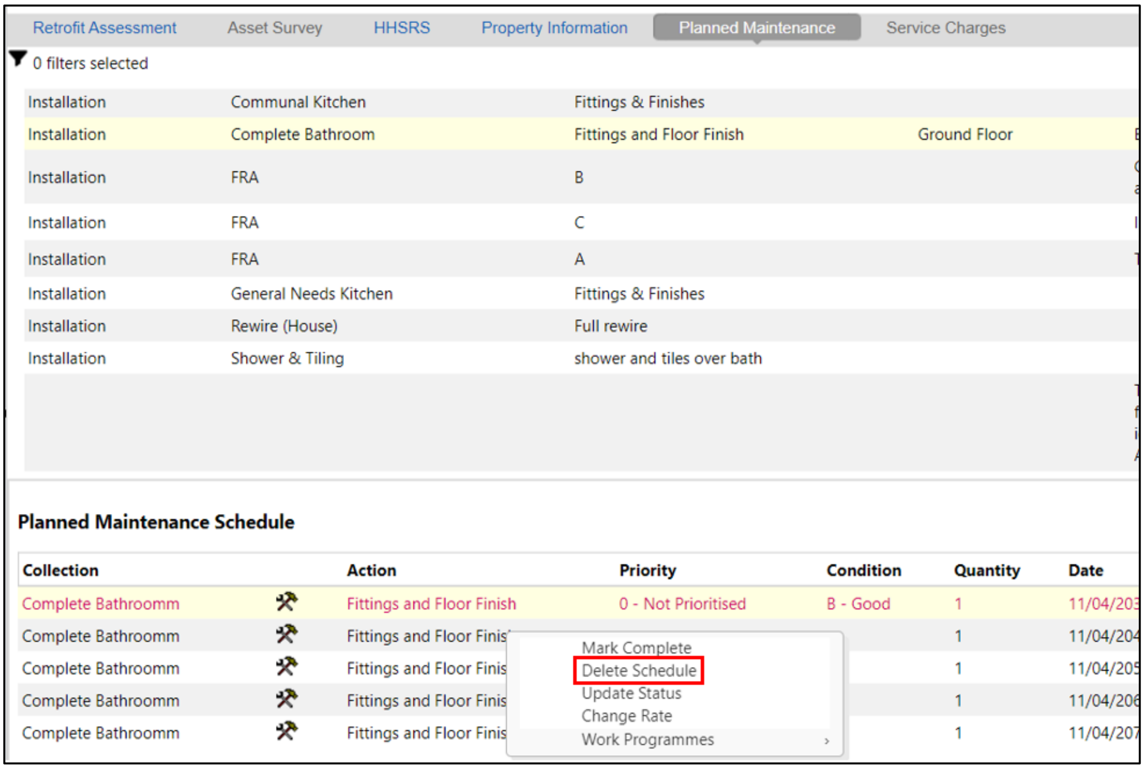


Figure 58: deleting a schedule

2. Tick the box if you want to remove all completed work records for this component or untick if you just want to remove any future work schedules against the selected attribute.

3. Confirm the removal by clicking 'Delete'.

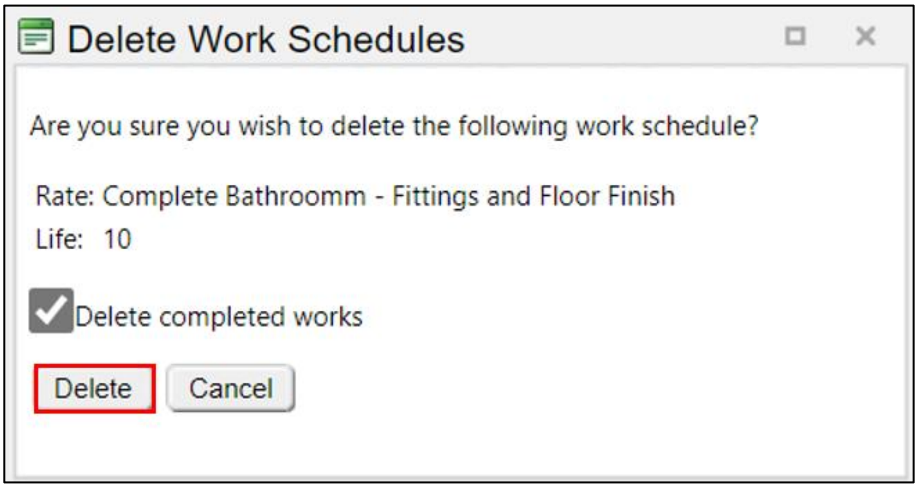


Figure 59: confirm the removal

5.11 Copying Property Attributes

1. On the ‘Summary’ tab, highlight the property you wish to copy attributes from by clicking on it in the address list.

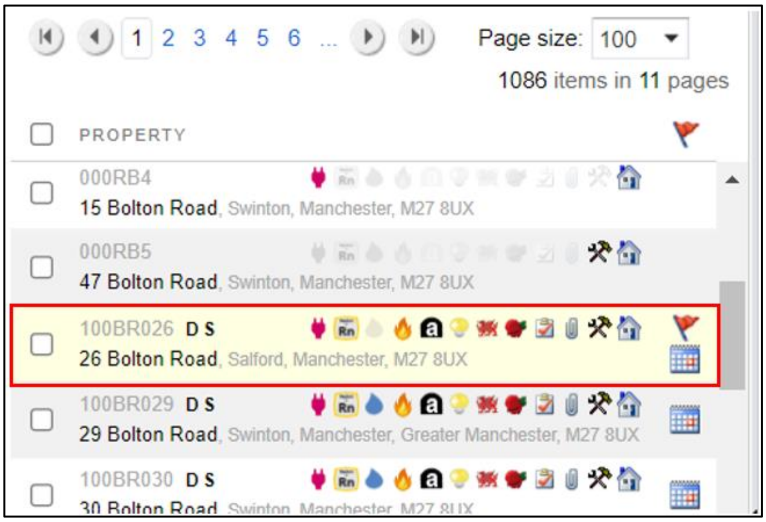


Figure 60: highlighting a property

2. Use the tick boxes to select the properties you wish the attributes to be copied to.

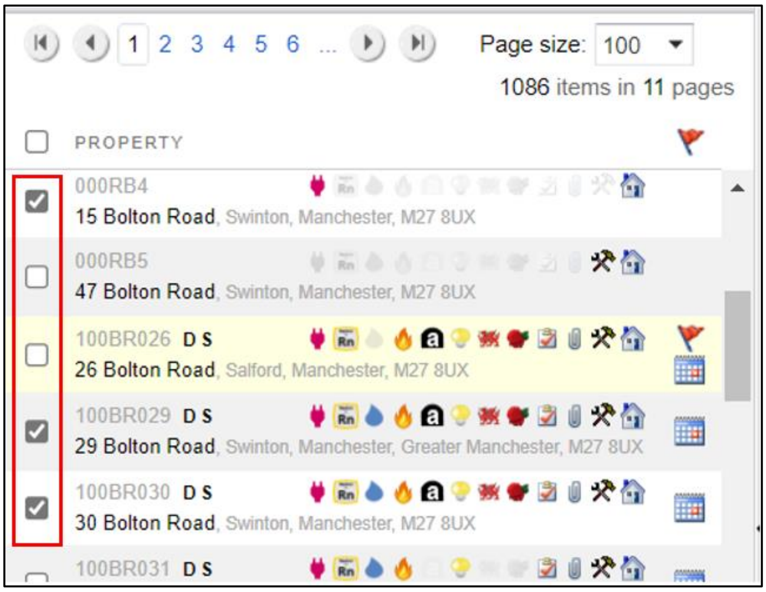


Figure 61: selecting properties by ticking them

3. Click on 'Copy'.

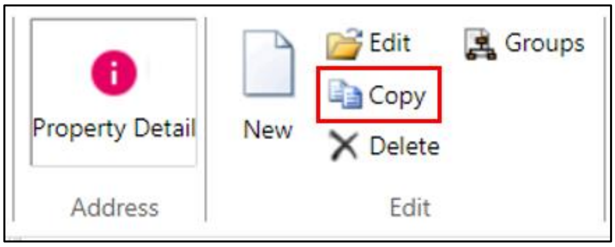


Figure 62: location of the copy button

4. You can choose to copy over data to just the ticked properties, or to all properties in the current filter. Select 'Ticked properties' to just copy to the three selected, then press 'Next'.

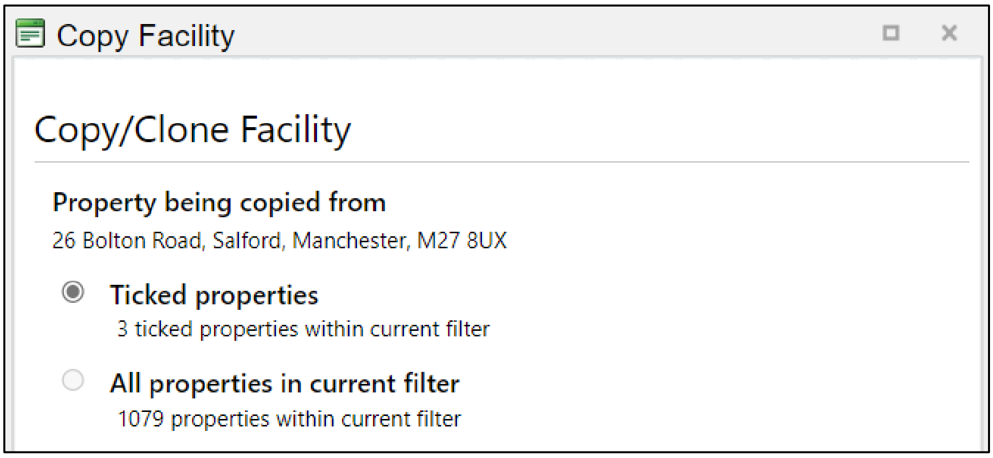


Figure 63: copy facility

5. Select the attributes to copy across and click 'Next'.

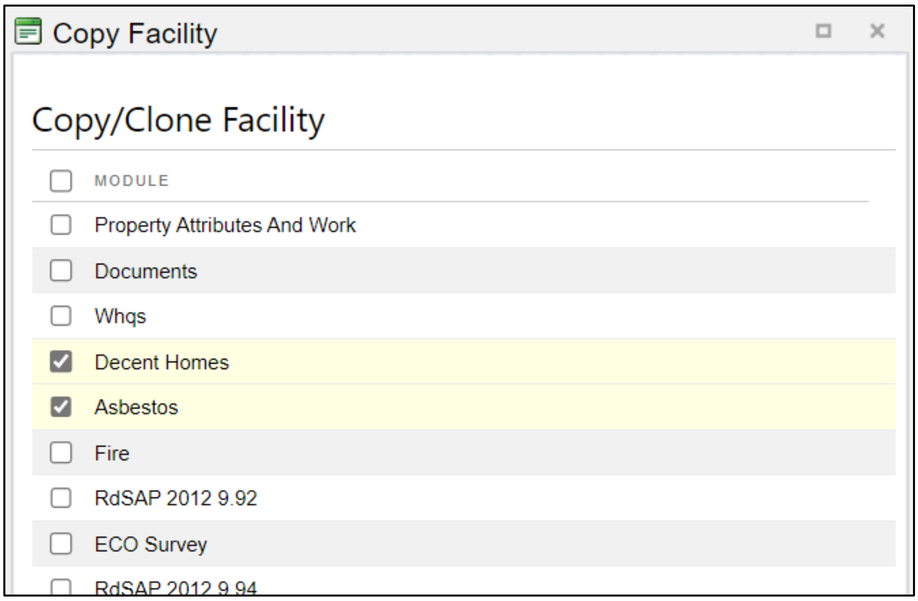


Figure 64: copying the attributes

6. This will bring up a screen with details of what has been selected. Press ‘Copy’ to confirm.

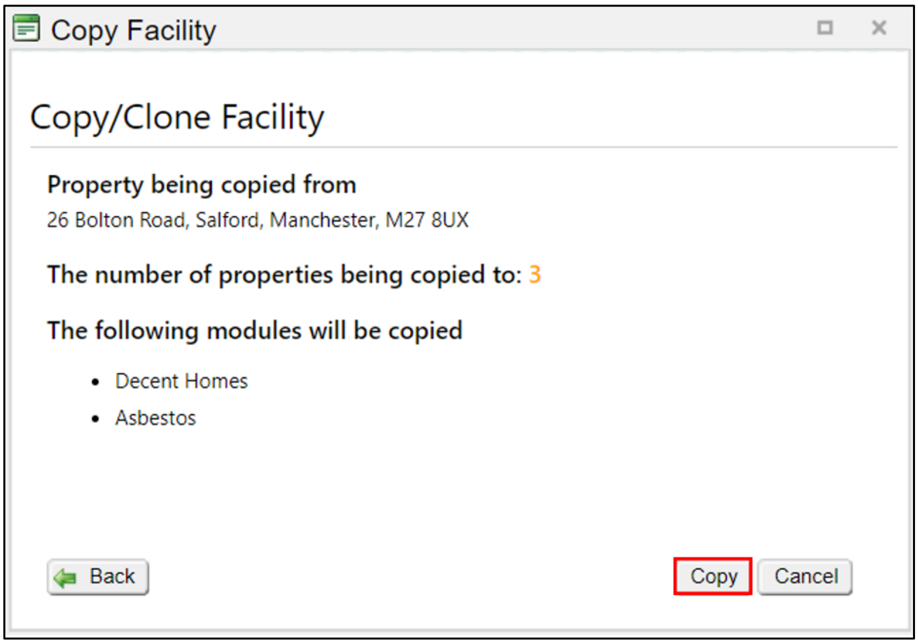


Figure 65: copy facility confirmation screen

5.12 Marking Works as Complete

1. Choose an attribute and then select the works schedule at the bottom of the screen.

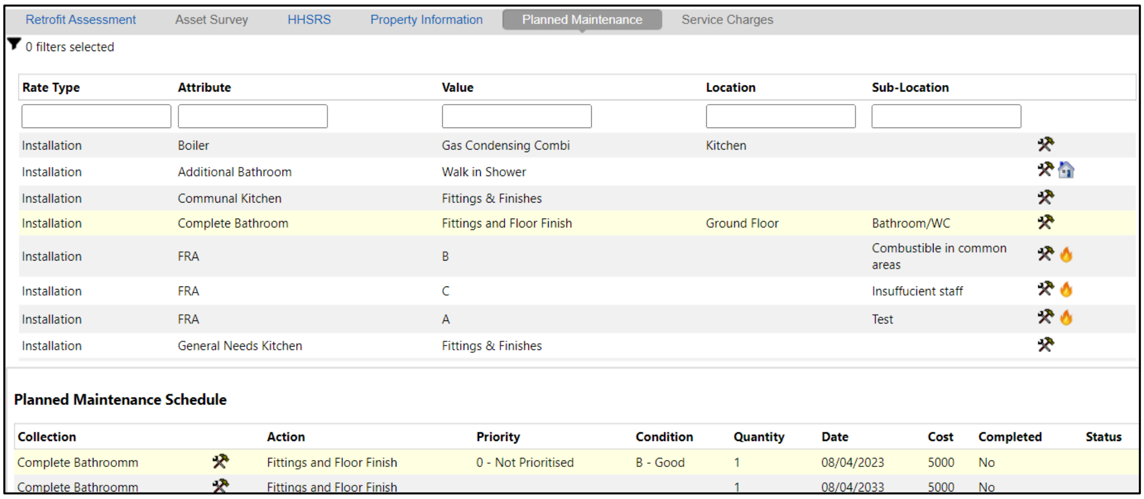


Figure 66: choosing a works schedule

2. Click on 'Work Completion' on the menu bar.

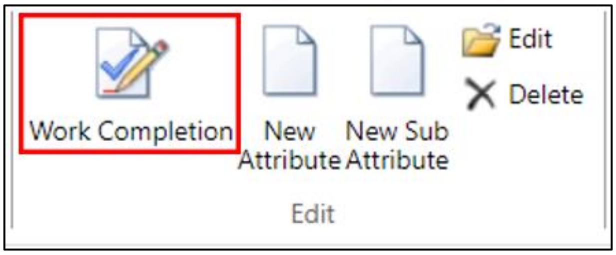


Figure 67: work completion button

3. Enter the actual cost of completion if this differs from the current work rate assigned. The tick box 'Do you want to change cost for selected properties?' enables you to change the cost of future work schedules to this same value – leave unticked to retain the rate cost for future works.

4. Enter the dates of completion using the calendar tool and tick the box to regenerate the future maintenance schedule. You are also given the option to select whether or not you want to update the linked maintenance tasks, just tick each box as required. Press 'Save'.

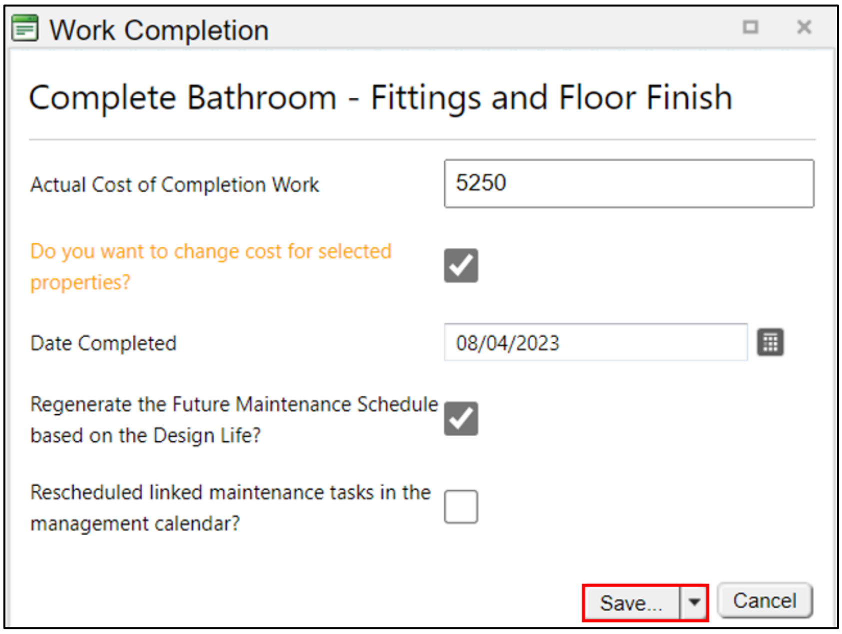
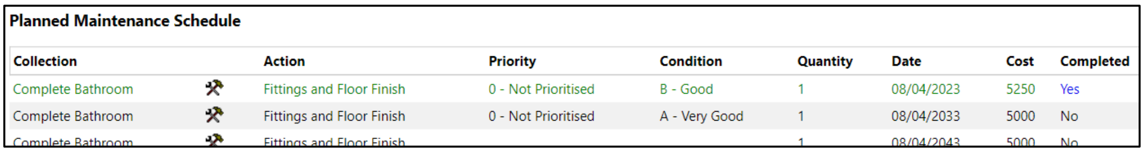


Figure 68: work completion options

Once a work item has been marked as complete, the schedule will be displayed in green and you will see 'Yes' recorded in the completed column.


Planned Maintenance Schedule

Collection		Action	Priority	Condition	Quantity	Date	Cost	Completed
Complete Bathroom		Fittings and Floor Finish	0 - Not Prioritised	B - Good	1	08/04/2023	5250	Yes
Complete Bathroom		Fittings and Floor Finish	0 - Not Prioritised	A - Very Good	1	08/04/2033	5000	No
Complete Bathroom		Fittings and Floor Finish			1	08/04/2043	5000	No

Figure 69: completed work schedule

NOTE Once a work item has been completed, this action cannot be undone. If marked as complete in error, the schedule will need to be deleted and re-inserted against the address.

6 Import/Export Sheets

All import/export sheets are accessible via the 'Property Attributes' module. They take the form of individual excel spreadsheets which can be used to insert new data or update existing information in bulk.

1. On the property attributes page, click on the 'Import/Export' button within the housekeeping section.

Figure 70: import/export button

2. The sheets are grouped into four different sections – Lookups, Analysis Groups, Core Information and Module Information.

Lookups

Attributes Lookup
Add Values to Attributes
Rates Lookup
Work Status Lookup
FRA Action Priorities
Lookup Fire Door Risk
Lookup Fire Door Assessment

Module Information

Assets & Servicing
Assets & Servicing Histories
Asbestos
Decent Homes
Documents
FRA
FRA (PAS 79:2012)
FRA (PAS 79:2020)
FRA Comments & Actions
FRA PAS+ Questions
FRA PAS+ Answers
FRA Action Maintenance
FRA - High Rise External Building Inspections
Fire Door Assessment
Fire Door Actions
HHSRS
Radon
Water
WHQS

Analysis Groups

Attribute Groups
Group Attributes under an Attribute Group
Work Group Headers
Work Groups
Group Rates under a Work Group
Property Group Headers
Property Groups
Group Properties under a Property Group

Core Information

Properties
Benchmark Property Attributes
Property Detail
Property Attributes
Property Sub Attributes
Works
Work Status
Calendar Items
Checklist Tasks
Property Checks
Compliance Links

Figure 71: choosing the data

6.1 Lookups

The 'lookup' sheets are used for the system configuration, they are essential in order to set up the background information which is then used within the relevant modules throughout the software.

- Attributes Lookup – set up new or amend existing attributes.
- Add Values to Attributes – assign pick list values to existing attributes.
- Rates Lookup – set up or amend existing work rates.
- Work Status Lookup – set up new or amend existing work status descriptions.
- FRA Action Priorities – set up new or amend existing FRA priorities and timescales.
- Lookup Fire Door Risk – set up new or amend existing risk criteria and assign timescales to fire door types.
- Lookup Fire Door Assessment – set up new or amend existing fire door assessment categories and questions.

6.2 Analysis Groups

The analysis group section contains all import/export sheets you will need to set up attribute, work and property groups for use within the software. Groupings are beneficial when filtering and reporting as they can help define your search criteria and offer value when reporting on various data sets.

- Attribute Groups – set up new or amend existing attribute groups.
- Group Attributes under an Attribute Group – assign attributes to a specific group.
- Work Group Headers – set up new or amend existing work group headers.
- Work Groups – set up new or amend existing work groups under the group headings.
- Group Rates under a Work Group – assign rates to an existing work group.
- Property Group Headers – set up new or amend existing property group headers.
- Property Groups - set up new or amend existing property groups under the group headings.
- Group properties under a Property Group - assign properties to an existing property group.

6.3 Core Information

The core information section contains all import/export sheets to enable new data to be added or existing data amended in relation to properties and associated records for attributes, works and tasks.

- Properties – set up new or amend existing addresses for the account.
- Benchmark Property Attributes – set up new or amend existing benchmark properties.
- Property Detail – assign details to a property or update existing information.
- Property Attributes – insert new or update existing property attributes.
- Property Sub Attributes - insert new or update existing property sub attributes.
- Works – insert new, update or mark existing works as complete.
- Work Status – assign a new or update an existing work status for one or multiple properties/work items.
- Calendar Items – set up new or amend existing calendar tasks.
- Checklist Tasks – set up new or amend existing checklist tasks.
- Property Checks – (linked with existing checklist tasks) assign a new or update an existing property check item.
- Compliance Links – link rates to existing compliance items for module data updates.

6.4 Module Information

The module information section contains all import/export sheets required to insert new or amend existing data for each module within the software.

- Assets & Servicing – insert new or amend existing property asset information.
- Assets & Servicing Histories – insert new or amend existing property asset servicing information.

- Asbestos – insert new or amend existing asbestos data and samples.
- Decent Homes – insert new or amend existing decent homes assessment data (English users only).
- Documents – insert new or amend existing attachment data.
- FRA/FRA (PAS 79:2012)/FRA (PAS 79:2020) – insert new or amend existing FRA data.
- FRA Comments & Actions – insert new or amend existing FRA comments and actions.
- FRA PAS+ Questions – define new or update existing FRA PAS+ questions.
- FRA PAS+ Answers – define new or update existing FRA PAS+ answers.
- FRA Action Maintenance – insert new, update or mark existing FRA works as complete.
- Fire Door Assessment – insert new or amend existing fire door assessment data.
- Fire Door Actions – insert new or amend existing fire door works.
- HHSRS – insert new or amend existing HHSRS assessment data.
- Radon – insert new or amend existing radon assessment, measure and sample data.
- Water – insert new or amend existing water assessment, measure and sample data.
- WHQS – insert new or amend existing WHQS assessment data (Welsh users only).

6.5 Import/Export Commands

All import/export sheets will include the 'Command' column, it is what the software uses to identify what action needs to be carried out.

There are four commands and these remain the same throughout the software, no matter which import sheet is being used. The commands are Insert, Update, Delete and Ignore – each of their purposes are outlined below.

- **Insert:** Used to add in new data
- **Update:** Used to update existing data
- **Delete:** Used to delete existing data
- **Ignore:** Used to ignore existing data

A command must be added for every row in your spreadsheet, if left blank you will receive an error message on import and no data will be updated in your account.

NOTE You will notice that some export sheets are pre-populated with the command 'Ignore', in these instances, you will only need to change the command for any of the rows you are either adding (Insert), editing (Update) or removing (Delete).

6.6 Exporting data

1. Click on any of the descriptions to open the applicable import/export function.

NOTE The export options remain consistent for the majority of descriptions, however there are some variants on the format of the export screen dependent on which option is selected.

2. Choose what data you want to export. 'Export' will download all existing information, enabling you to either amend current records or add new data and 'Template Export' will download a blank template for you to insert new data only.

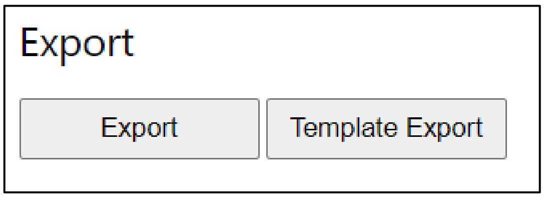


Figure 72: export options (general)

Some of the alternative export screens are shown below, with a description of their use.

- **Work Status Lookup**

  This export sheet enables you to choose whether you want to include retired work statuses in the export or just active ones. To include retired, tick this box prior to exporting the data.

Figure 73: export options (work status lookup)

- **Property Filters**

  In each instance where the export relates to property level information, the following export sheet will be displayed to include an option to 'only export properties in the current filter'. This is a useful tool for when you only want to view records for specific properties rather than the full housing stock.

  To enable this function, you will need to apply a filter to your address list prior to selecting the import sheet. The tick box will be ticked by default if you have a filter applied, untick to export data for all properties in the account.

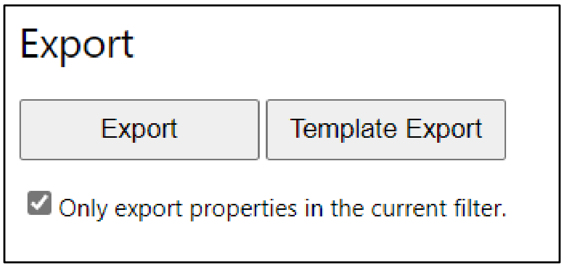


Figure 74: export options (property filter)

- **Property Attributes**

  This export sheet allows you to apply an additional filter to the data prior to exporting. You are given the option to select either 'Attribute Name' or 'Attribute Template' before choosing one or more attributes (attribute name) or one or more group of attributes (attribute template).

  Choose your preferred attribute filter and then use the 'Filter By' drop down list to select the filters required.

NOTE If 'None' is selected as the attribute filter, your exported sheet will include all property attributes.

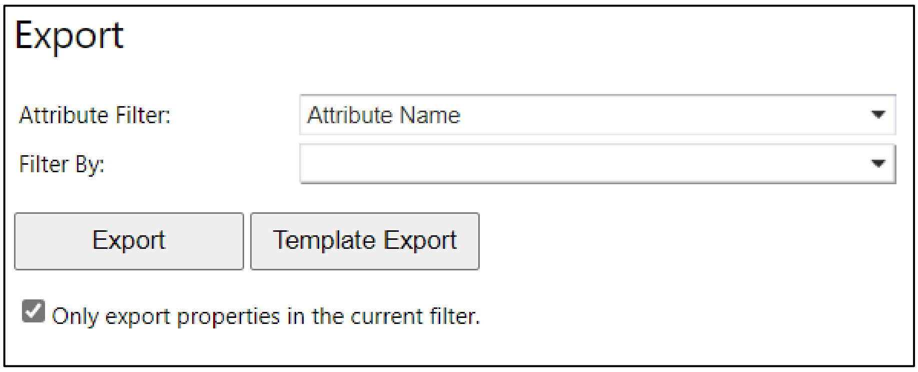


Figure 75: export options (property attributes)

- **Property Maintenance**

  The 'Works' export contains the property maintenance data and you will be able to apply additional filters before exporting the information.

NOTE The maintenance data export will not include any completed works as you are unable to make any changes to a work item once it is marked complete. If you want to view the completed work records, you will be able to access the information and export data via the reports wizard. For further guidance please refer to section **23.2 Custom Reports.**
You are given the option to select either 'Work Collection' or 'Attribute Name' before choosing one or more work items (work collection) or attributes (attribute name).

Choose your preferred work filter and then use the 'Filter By' drop down list to select the filters required.

NOTE If the 'Work Filter' is left blank, your exported sheet will include all work items.

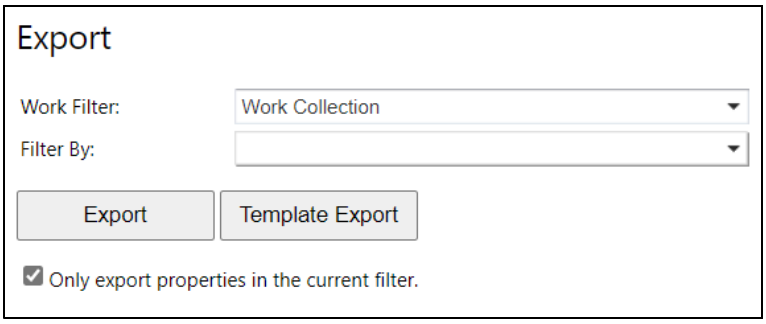


Figure 76: export options (planned maintenance)

- **Calendar**

  The calendar export allows you to filter by task type and date range before exporting the details. The task type options include Asbestos, FRA, Maintenance, Water and None.

  Choose the required task type and update the start and end date fields by either typing in a date or selecting via the calendar icon.

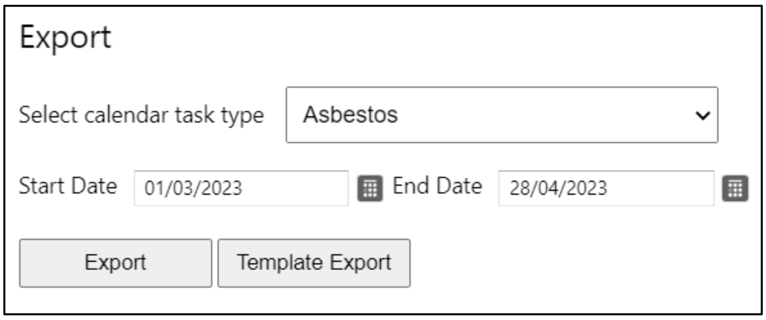


Figure 77: export options (calendar)

- **FRA**

  The 'FRA Actions & Comments' screen shows an additional option above the export section as you are required to select the applicable FRA template to enable the software to generate the applicable data export. Select from the drop down list and export as normal.

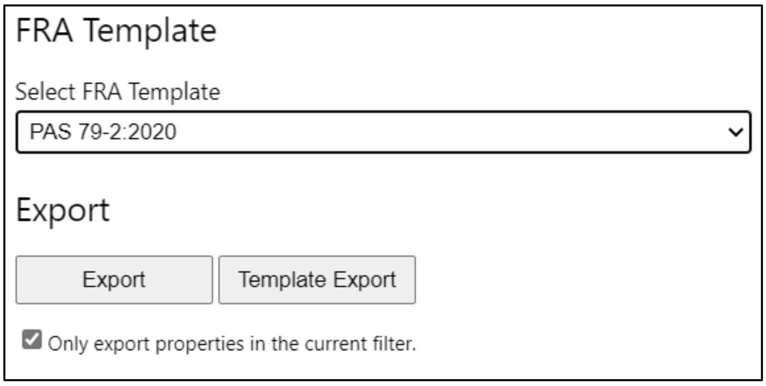


Figure 78: export options (FRA comments and actions)

- **Radon**

  The radon module contains information relating to the assessments, measures and samples. Each of these data sets requires a separate import/export sheet so the software can determine where any new or amended data should be implemented within Lifespan.

  Above the export section you will need to select the radon category to choose what data or template you want to export, either assessment data or the radon measures or samples. Select from the drop down list and export as normal.

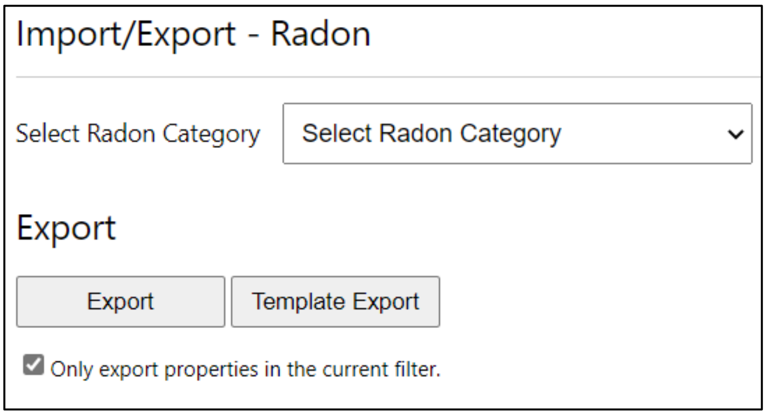


Figure 79: export options (radon)

- **Water**

  The water module contains information relating to the assessments, measures and samples. Each of these data sets requires a separate import/export sheet so the software can determine where any new or amended data should be implemented within Lifespan.

  Above the export section you will need to select the water type to choose what data or template you want to export, either assessment data or the water measures or samples. Select from the drop down list and export as normal.

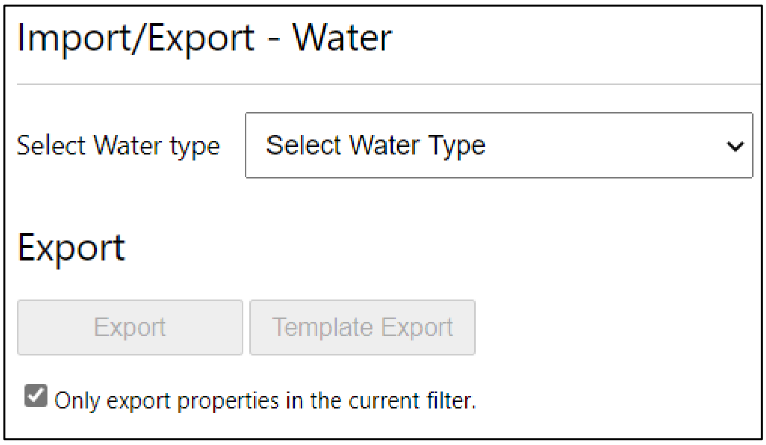


Figure 80: export options (water)

6.7 Editing Import/Export Sheets

The import/export facility is available for a wide range of datasets, however there are similarities between many of the export sheets and the editing process is consistent for each.

1. Once you have selected the applicable section and chosen either the full or template export, an excel file download will be generated. Open the file on your computer.

   The spreadsheet will contain a number of columns relating to the dataset you have chosen. If a template export has been chosen, this is the only information you will see allowing you to populate the sheet with new data. Alternatively, if you have selected 'export' the rows below will display all existing data held in Lifespan for your chosen criteria, allowing you to edit existing data in addition to populating with new data.

2. Make your changes to the sheet, ensuring the 'Command' column is populated for each row and save your spreadsheet ready to import back to Lifespan.
   For further guidance on commands, please refer to section **6.5 Import/Export Commands**.

NOTE You will notice that some export sheets are pre-populated with the command 'Ignore', in these instances, you will only need to change the command for any of the rows you are either adding (Insert), editing (Update) or removing (Delete).

3. A common field when using the import/export sheets is 'UpdateToNewReference' or 'UpdateToNewName'.
   Throughout the export sheets, the software uses a column or combination of columns in some instances as the unique identifier to determine what dataset or property information needs to be updated when it is imported back into Lifespan.
   The purpose of the 'UpdateToNew….' column is so that you can amend the existing identifier without causing the software to error.
   i.e. if you want to change the name of an existing attribute, leave the 'Name' column with its current value and populate the 'UpdateToNewName' with the replacement name. In this scenario, the command being used is 'Update' as you are amending existing data.

   e.g.

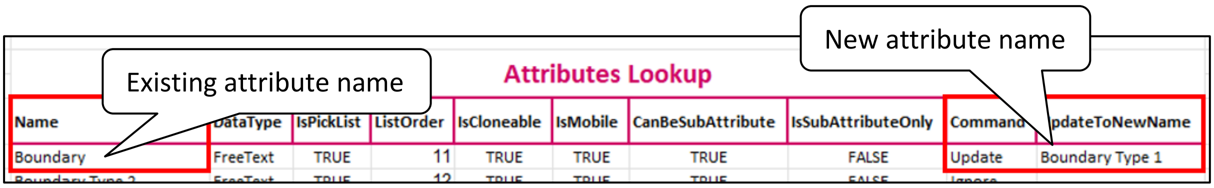


Figure 81: attributes lookup example

6.7.1 Lookups

The 'lookup' sheets are used for the system configuration, they are essential in order to set up the background information which is then used within the relevant modules throughout the software. This group of import/export sheet are unlike others as the column headers don't always relate back to specific fields in Lifespan, the data here is used to tell the software how you want the information to be presented.

Below are a couple of examples of Lookup sheets.

- **Attributes Lookup**

  The ‘Attributes Lookup’ sheet is used to create new or amend/delete existing attributes. An attribute has to be created before it will be available in the software to insert at property level.

Attributes Lookup

Name	DataType	IsPickList	ListOrder	IsCloneable	IsMobile	CanBeSubAttribute	IsSubAttributeOnly	Command	UpdateToNewName

Figure 82: attributes lookup

The column headers include.

- Name: Text field to assign a name for your attribute.
- DataType: choose from either ‘FreeText’, ‘Number’ or ‘Date’.
- IsPickList: ‘TRUE’ or ‘FALSE’. If marked as true you can add a list of preset values for users to select from.
- ListOrder: the order you see the attributes displayed once assigned to a property. Each attribute can be assigned a number or ‘0’ can be used for all and the list will default to alphabetical order.
- IsCloneable: ‘TRUE’ or ‘FALSE’. Choose whether you want to be able to clone data across different properties.
- IsMobile: ‘TRUE’ or ‘FALSE’. Whether or not the attribute is displayed within the mobile software (this can be modified prior to a survey being carried out to update the survey design).
- CanBeSubAttribute: ‘TRUE’ or ‘FALSE’. Whether or not the attribute can be used as a sub-attribute.
- IsSubAttributeOnly: ‘TRUE’ or ‘FALSE’. Whether or not the attribute should only be assigned as a sub-attribute.
- Command: ‘Insert’, ‘Update’, ‘Delete’ or ‘Ignore’. How the data is processed on import.
- UpdateToNewName: Text field to change the name of an existing attribute.

- **Rates Lookup**

  In order to create work items at property level, you need to ensure the rate information has been set up – this is done via the ‘Rates Lookup’ sheet.

Rates Lookup

Reference	Collection	Description	RateType	Cost	Life	Uom	LifeUnit	IsArchived	ServiceCharge	ServiceChargeRecoverableRate	Command	UpdateToNewReference

Figure 83: rates lookup

The column headers include.

- Reference: A unique identifier for each rate. It can be numbers/text or alphanumeric.
- Collection: Text field. Ideally this matches up with an existing attribute name – provides a collection for the work.

- Description: Text field. Ideally this matches up with an existing attribute value associated with the work collection – provides a description of the work.
- RateType: Text field to define the type of work being carried out. i.e. 'Installation', 'Cyclical', 'Energy' etc.
- Cost: Number field to define the average expected cost of the rate (this can be updated at property level where required to show exact costs on completion of work).
- Life: Number field to define the estimated lifecycle of the component.
- Uom: Text field to define the unit of measure per rate. i.e., 'm²', 'lm', 'Item' etc.
- LifeUnit: 'Y' or 'M' to confirm whether the lifecycle is measured in either Years or Months.
- IsArchived: 'TRUE' or 'FALSE'. If marked as true the rate cannot be assigned to any new work items. It will be stored in the software so you can still have visibility of completed works using the rate.
- ServiceCharge: 'TRUE' or 'FALSE' to show if a service charge applies to the rate.
- ServiceChargeRecoverableRate: Number field to show the percentage of rate recoverable amount i.e., 0-100.
- Command: 'Insert', 'Update', 'Delete' or 'Ignore'. How the data is processed on import.
- UpdateToNewReference: Text field to change the reference of an existing rate.

6.7.2 Analysis Groups

The 'Analysis Groups' section contains import/export sheets in relation to groupings within the software.

There are three types of data which can be grouped within the software, these are attributes, works and properties.

- **Attribute Groups**

  There are two steps for creating attribute groups, first you create the group and second you assign the attributes to that group.

1. The 'Attribute Groups' export contains only three columns.

Attribute Templates

Name	Command	UpdateToNewName

Figure 84: attribute templates

The column headers include.

- Name: Text field to define the name of the group as you want it to appear in Lifespan.
- Command: 'Insert', 'Update', 'Delete' or 'Ignore'. How the data is processed on import.
- UpdateToNewName: Text field to change the name of an existing group.

2. The 'Group Attributes under an Attribute Group' sheet enables you to then define which attributes should be within each group.

Template Attribute Links		
Template	Attribute	Command

Figure 85: template attribute links

Again, there are three column headers.

- <u>Template</u>: Text field – this needs to match exactly with the 'Name' of the attribute group set up in the 'Attribute Groups' export. This is repeated on each row for as many attributes are required.
- <u>Attribute</u>: Text field – one attribute per row. The attributes listed need to already exist in the account and the name needs to match exactly so it can be identified by the software on import.
- <u>Command</u>: 'Insert', 'Update', 'Delete' or 'Ignore'. How the data is processed on import.

- **Work Groups**

There are three import sheets required to set up work groups. The first sheet enables you to create the group header, second the group names and third assigning specific rates to your selected group.

1. The 'Work Group Headers' export sheet contains only three columns and allows you to define a heading for each work group.

Work Group Headers		
Name	Command	UpdateToNewName

Figure 86: work group headers

The column headers include.

- <u>Name</u>: Text field to define the name of the group i.e. 'Work Type', 'Survey Type' etc.
- <u>Command</u>: 'Insert', 'Update', 'Delete' or 'Ignore'. How the data is processed on import.
- <u>UpdateToNewName</u>: Text field to change the name of an existing group header.

NOTE In order for the data to be shown correctly in the mobile software the group header 'Work Type' should be used.

2. The 'Work Groups' sheet enables you to define the values that sit under each heading.

Work Groups			
GroupHeader	Name	Command	UpdateToNewName

Figure 87: work groups

The column headers include.

- GroupHeader: Text field – this needs to match exactly with the 'Name' of the work group set up in the 'Work Group Headers' export. This is repeated on each row for as many groups are required under each heading.
- Name: Text field – one work group name per row i.e. Kitchen, Bathroom, External Fabric, Roof Fabric etc.
- Command: 'Insert', 'Update', 'Delete' or 'Ignore'. How the data is processed on import.
- UpdateToNewName: Text field to change the name of an existing group.

3. The 'Group Rates under a Work Group' sheet is used to assign rates to a group, to enable collection of these maintenance items on the mobile software.

Rate Classification Links					
GroupHeader	ClassificationName	Reference	Collection	Description	Command

Figure 88: rate classification links

The column headers include.

- GroupHeader: Text field – this needs to match exactly with the 'Name' of the work group set up in the 'Work Group Headers' export. This is repeated on each row for as many groups are required under each heading.
- ClassificationName: Text field – one work group name per row i.e. Kitchen, Bathroom, External Fabric, Roof Fabric etc.
- Reference: Unique rate reference – must already exist in the rates lookup.
- Collection: Text field – this needs to match the collection field in the rates lookup for the selected rate.
- Description: Text field – this needs to match the description field in the rates lookup for the selected rate.
- Command: 'Insert', 'Update', 'Delete' or 'Ignore'. How the data is processed on import.

- **Property Groups**

The property groups import/export sheets follow a similar format to the work groups as there are three import sheets required to set up the groups.
The first sheet enables you to create the group header, second the group names and third assigning properties to your selected group.

1. The 'Property Group Headers' export sheet contains four columns and allows you to define a heading for each property group.

Property Group Headers			
Name	IsMobile	Command	UpdateToNewName

Figure 89: property group headers

The column headers include.

- Name: Text field to define the name of the group as you want it to appear in Lifespan i.e. 'Asset Type', 'Property Type', 'Survey Type' etc.
- IsMobile: 'TRUE' or 'FALSE' to confirm if the grouping should be displayed on the mobile software for data to be added/updated during surveys.
- Command: 'Insert', 'Update', 'Delete' or 'Ignore'. How the data is processed on import.
- UpdateToNewName: Text field to change the name of an existing group header.

2. The 'Property Groups' export sheet is used to create or edit the property groups for the account.

Property Groups			
GroupHeader	Name	Command	UpdateToNewName

Figure 90: property groups

The column headers include.

- GroupHeader: Text field – this needs to match exactly with the 'Name' of the property group set up in the 'Property Group Headers' export. This is repeated on each row for as many groups are required under each heading.
- Name: Text field – one property group name per row i.e. Dwelling/Block (Asset Type), Surveyed/Cloned/Partial Survey (Survey Type) etc.
- Command: 'Insert', 'Update', 'Delete' or 'Ignore'. How the data is processed on import.
- UpdateToNewName: Text field to change the name of an existing group.

3. The 'Group Properties under a Property Group' sheet enables you to assign properties to specific groups in bulk.

NOTE You cannot assign a property to more than one group within the same group heading i.e. a property would not be classed as both 'Block' and 'Dwelling' under the heading 'Asset Type' – only one grouping applies.

Property Groupings				
GroupHeader	Group	UPRN	Address1	Command

Figure 91: property groupings

The column headers include.

- GroupHeader: Text field – this needs to match exactly with the 'Name' of the property group set up in the 'Property Group Headers' export.
- Group: Text field – this needs to match exactly with the 'Name' of the property group set up in the 'Property Groups' export.
- UPRN: Text field to define the UPRN of the property you want to assign to the group.
- Address1: Text field to define address line 1 of the property you want to assign to the group. This address should match the UPRN provided in the previous column.
- Command: 'Insert', 'Update', 'Delete' or 'Ignore'. How the data is processed on import.

6.7.3 Core Information

The 'Core Information' sheets are used to define and update data at property level. This includes updating the property address details through to adding/updating attributes and work information.

Any changes applied using these import/export sheets can also be done via the user interface, however the import sheets enable you to insert or amend data in bulk rather than individually.

Below are a few examples of Core Information sheets.

- **Properties**

  The properties import sheet is used to create new and edit existing properties in your Lifespan account.

Properties											
UPRN	Address1	Address2	Address3	Address4	Postcode	Longitude	Latitude	GovernmentUPRN	IsValidated	Command	UpdateToNewReference

Figure 92: properties

The column headers include.

- UPRN: Used to define the 'Unique Property Reference Number'. It can be numbers/text or alphanumeric.
- Address1 - Postcode: Text fields to define the property address. You must have as a minimum a UPRN, Address1 and Postcode – the remaining address fields are not mandatory.
- Longitude/Latitude: Number fields to define the location of the property. If unknown, '0' can be used – this will be automatically updated by the software once imported based on the postcode of the address.
- GovernmentUPRN: Used to define the associated Government UPRN for the address. This field is not mandatory and can be left blank (there is an address match facility within the RdSAP module which can be used to update this field where required).
- IsValidated: 'TRUE' or 'FALSE' to confirm if the property should be marked as validated.
- Command: 'Insert', 'Update', 'Delete' or 'Ignore'. How the data is processed on import.

- UpdateToNewReference: Text field to change the UPRN of an existing property.

- **Property Attributes**

The property attributes import sheet is used to assign attributes to specific properties.

Property Attributes						
UPRN	Address1	Location	SubLocation	Attribute	Value	Command

Figure 93: property attributes

The column headers include.

- UPRN/Address1: Used to define the 'Unique Property Reference Number' and address line 1 of the property you are updating. The chosen address must already exist and details provided here need to match exactly to those in your Lifespan account.
- Location/Sublocation: Text fields to define a location and/or sublocation to the attribute. These fields are not mandatory, they can be used to provide additional details or should be used if there is more than one attribute of the same name at the address to avoid duplication i.e Attribute: Bathroom, Location: Bathroom (2).
- Attribute: Text field to define the attribute being allocated to the address. The name needs to match exactly with an existing attribute in your Lifespan account.
- Value: Text field to define the attribute value being allocated to the address. The name needs to match exactly with an existing value in your Lifespan account, associated with the selected attribute.
- Command: 'Insert', 'Update', 'Delete' or 'Ignore'. How the data is processed on import.

NOTE A unique attribute is made up of the combined values 'Location, Sublocation, Attribute'. This means you will not be able to 'Update' the location or sublocation for an attribute via the import/export function as the combination of values would no longer be recognised by the software to know what needs to be updated. To change the location/sublocation of an existing attribute it would either need to be deleted and re-inserted as new or updated manually via the user interface.

- **Works**

The works import sheet is used to assign a maintenance schedule to an existing attribute for a property.

NOTE Before a maintenance schedule can be added to a property via the works import export you must ensure that the attribute you are assigning the work to already exists. If not, it will need to be inserted via the 'Property Attributes' import sheet.

Property Maintenance																			
UPRN	Address1	WorkReference	Location	SubLocation	Attribute	Value	Reference	Collection	Description	RateType	RecoveredServiceChargePercent	Condition	Priority	Quantity	Cost	ActionDate	MarkWorksAsComplete	Command	UpdateToNewRateReference

Figure 94: property maintenance

The column headers include.

- UPRN/Address1: Used to define the 'Unique Property Reference Number' and address line 1 of the property you are updating. The chosen address must already exist and details provided here need to match exactly to those in your Lifespan account.
- WorkReference: No action required. This reference is generated automatically by the software on import. This field can be left blank for new work items and will be pre-populated for existing work.
- Location/Sublocation/Attribute/Value: Text fields to define the location, sublocation, attribute and value. The combination of values recorded here need to match an existing attribute for the selected property.
- Reference/Collection/Description/RateType: Text fields to define the reference, collection, description and rate type of the work you want to assign. This information needs to match exactly with an existing rate in your Lifespan account.
- RecoveredServiceChargePercent: Number field to define the percentage of the cost being recovered by a service charge.
- Condition: 'A – Very Good', 'B – Good', 'C – Average', 'D – Poor' or 'E – Very Poor' to confirm the current condition of the component.
- Priority: '0 – Not Prioritised', '1 – Loss of Amenity', '2 – High Cost', '3 – Serious Risk' or '4 – Dangerous' to confirm the priority status of the work.
- Quantity: Number field to define the quantity of work required. You should consider the unit of measure of the assigned rate when calculating the quantity needed i.e. if the rate cost is per dwelling, qty is usually 1, whereas a m^2 or lm unit of measure would imply a higher quantity is needed.
- Cost: Number field to define the cost of the work required. You can refer to the rates table to determine the base cost or assign alternative if known.
- ActionDate: Date field to define the next replacement date for the component.
- MarkWorksAsComplete: 'TRUE' or 'FALSE' to confirm if the work item is completed or still outstanding.
- Command: 'Insert', 'Update', 'Delete' or 'Ignore'. How the data is processed on import.
- UpdateToNewReference: Text field to change the rate of an existing work item.

6.7.4 Module Information

The 'Module Information' sheets are used to define and update data at property level. There are separate import/export sheets to enable updating of module data, with the exception of energy data which needs to be edited on an individual property basis via the user interface.

Any changes applied using these import/export sheets can also be done via the user interface, however the import sheets enable you to insert or amend data in bulk rather than individually.

Below are a couple of examples of Module Information sheets.

- **Asbestos**

Each row of data in the exported sheet refers back to an individual asbestos assessment in Lifespan. The fields in the sheet match those collected via the user interface when adding a new or editing an existing assessment in the 'Asbestos' module.

The software is expecting specific data on import so like some of the other module sheets, the asbestos export contains a second tab to provide some key module information – this includes an 'Asbestos Import Fields and Constraints' table and a 'Combinations' table. These should be used as reference when populating the sheet to ensure the correct values are recorded and prevent errors when re-importing.

Asbestos Import Fields and Constraints

Field Name	Required	Note	Data Format	Default Value	Fixed Values
UPRN	Yes		Text, 20		
SurveyType	Yes		String	Management	Management
SampleType			Text, 50	Discounted	Sampled
SampleID	Yes		Text, 50		
SampleResults	Yes	Defaults if Discounted Sample	Text, 50	Discounted	
Location1	Yes		Text, 50		
Location2	Yes		Text, 50		
ElementType	Yes		Text, 50		
ActionRequired	Yes	Defaults if Discounted Sample	Text, 50	Not Applicable	
AssessmentDate	Yes		Date, DD/MM/YYYY		
ConsultantName	Yes		Text, 50		
SurveyorName	Yes		Text, 50		
ActionTaken		Defaults if Discounted Sample	Text, 50		
LastReviewDate		Defaults if Discounted Sample	Date, DD/MM/YYYY		
NextReviewDate		Defaults if Discounted Sample	Date, DD/MM/YYYY		

Figure 95: asbestos import fields and constraints

Combinations

SurveyType	SampleType
Management	Presumed
Management	Discounted
Management	Sampled
Management	Presumed
Management	Discounted
Re-Inspection	Presumed
Re-Inspection	Discounted
Re-Inspection	Sampled
Re-Inspection	Presumed
Re-Inspection	Discounted
Demolition and Refurbishment	Sampled
Demolition and Refurbishment	Presumed
Demolition and Refurbishment	Discounted

SampleType	SampleResults
Discounted	Discounted
Presumed No Access	Discounted
No Suspect Material	Discounted
Sampled	Pending
Sampled	Positive
Sampled	Negative
Presumed	Presumed
Presumed	Positive
Presumed	Negative

Score	Material Field Na	Fixed Values	Priority Fi
0	MADescription1	Discounted suspect material	PADescrip
1	MADescription1	Plastics	PADescrip
1	MADescription1	Resins	PADescrip
1	MADescription1	Mastics	PADescrip
1	MADescription1	Roofing felts	PADescrip
1	MADescription1	Vinyl floor tiles	PADescrip
1	MADescription1	Semi rigid paints	PADescrip
1	MADescription1	Decorative finishes	PADescrip
1	MADescription1	Cement product	PADescrip
1	MADescription1	Asbestos cement	PADescrip
2	MADescription1	Insulating board	PADescrip
2	MADescription1	Asbestos insulating board	PADescrip
2	MADescription1	Mill boards	PADescrip
2	MADescription1	Other low density insulation boards	PADescrip
2	MADescription1	Textiles	PADescrip
2	MADescription1	Asbestos textiles	PADescrip
2	MADescription1	Gaskets	PADescrip
2	MADescription1	Ropes	PADescrip
2	MADescription1	Woven textiles	PADescrip
2	MADescription1	Paper	PADescrip
2	MADescription1	Asbestos paper	PADescrip
2	MADescription1	Felt	PADescrip
2	MADescription1	Asbestos felt	PADescrip
3	MADescription1	Pipe lagging	PADescrip
3	MADescription1	Boiler lagging	PADescrip

Figure 96: combinations

- **Documents**

Each row of data in the exported sheet refers back to an individual attachment in Lifespan. The fields in the sheet match those collected via the user interface in Lifespan when adding a new or editing an existing attachment in the 'Documents' module.

Property Attachments									
UPRN	FileName	DocReference	FileType	Description	DateCreated	Show	AttachmentType	Command	UpdateToNewFileName

Figure 97: property attachments

The column headers include.

- UPRN: Used to define the 'Unique Property Reference Number' of the property you are updating. The chosen address must already exist and details provided here need to match exactly to those in your Lifespan account.
- Filename: Text field to define the filename (including extension) of the attachment.
- DocReference: Text field to define a reference for the attachment. This field is not mandatory and can be left blank if no reference is required.
- FileType: 'Image', 'Document' or 'URL' to confirm the type of file.
- Description: Text field to provide a description of the attachment.
- DateCreated: Date field to confirm the date to be displayed in Lifespan.
- Show: 'TRUE' or 'FALSE' to confirm if the attachment should be marked as the 'Main Image' i.e., the photograph displayed on the summary screen for the selected address.
- AttachmentType: 'Asbestos', 'FRA', 'Water', 'Radon' or 'Appliance' to confirm if the attachment is linked to one of these modules or 'None' if not.
- Command: 'Insert', 'Update', 'Delete' or 'Ignore'. How the data is processed on import.
- UpdateToNewFileName: Text field to change the file name of an existing attachment.

NOTE Once the sheet has been re-imported, you will see a record created within the 'Documents' module for the applicable address. In order for the attachment to appear, you will need to provide the Lifespan team with the physical attachment files (via FTP or other). These can then be uploaded to the server to link up by the relevant file names so it is important to make sure the filename recorded on the import sheet matches the file exactly – including the extension name.

6.8 Importing Data

Once you have made the necessary changes and saved your excel sheet, return to Lifespan to import into your account.

If you are still within the Import/Export area in Lifespan, click 'Go Back' to return to the import screen. 'Back to Links' is used to return to the full list of import/export options.

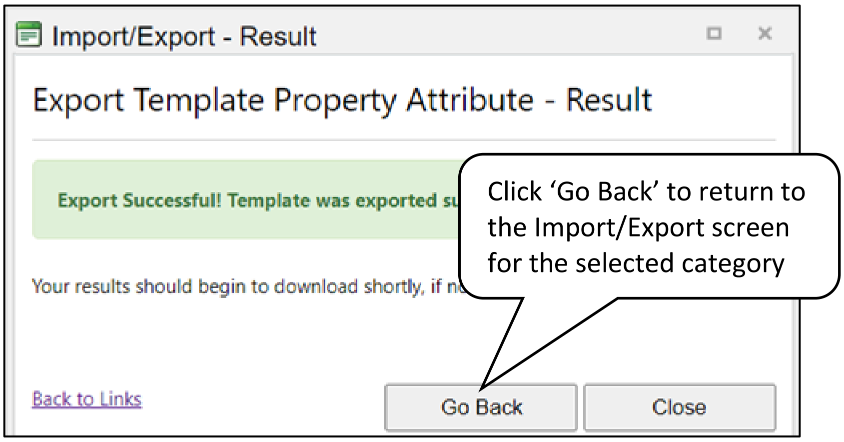


Figure 98: export result

Alternatively, return to page via the 'Property Attributes' module, 'Import/Export' button and select the relevant category from the list.

NOTE The import options remain consistent for the majority of descriptions, however there are some variants on the format of the import screen dependent on which option is selected.

1. Click 'Choose File' and select the file you have saved, then click 'Import'.

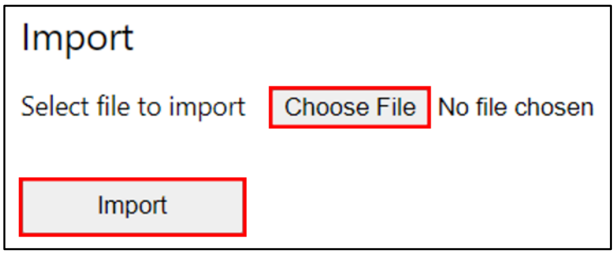


Figure 99: import

Some of the alternative import screens are shown below, with a description of their use.

- **Rates Lookup**

  By default, the software will not update any rate information linked to existing works when importing changes to the rates lookup, which means that the changes will only impact on any new maintenance schedules added after the updates.

  The 'Update Planned Maintenance' option allows you to choose whether you want to update existing works and if so, which elements of the rate you want to update.

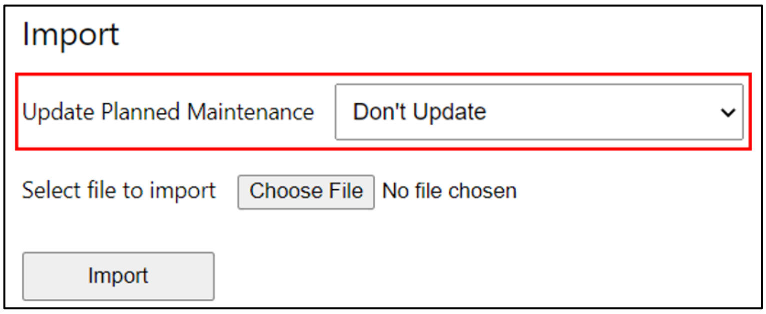


Figure 100: import options (lookup rates)

You can select from the following options.

- Don’t Update: The changes will not impact on any existing works; they apply only to new maintenance schedules added after the updates.
- Costs in Existing Data: This will update the costs for all existing and future maintenance schedules.
- Lifecycles in Existing Data: This will update the lifecycles of all existing and future maintenance schedules.
- Costs & Lifecycles in Existing Data: This will update both costs and lifecycles of all existing and future maintenance schedules.
- Service Recharges: This will update the service recharges for the account.

1. Select one of the options from the drop down list next to the heading ‘Update Planned Maintenance’.

2. Click ‘Choose File’ and select the file you have saved, then click ‘Import’.

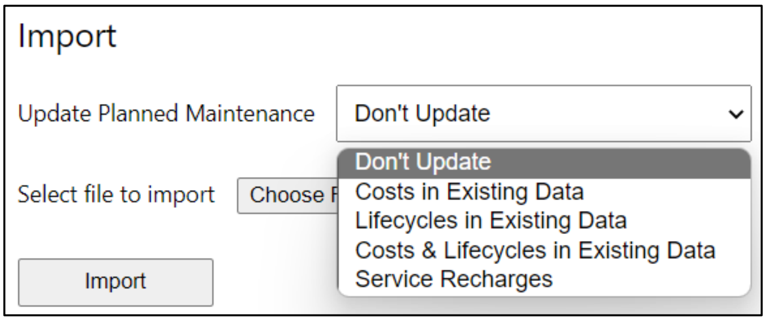
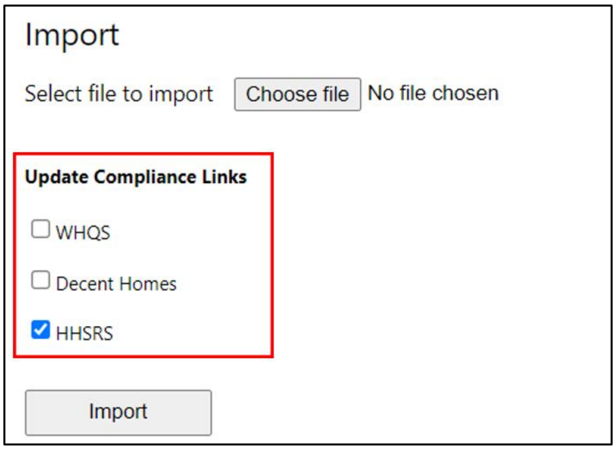


Figure 101: import options (lookup rates)(2)

NOTE Once a selection has been made and the data sheet imported it will be implemented immediately and can only be used once per import. i.e., if the data sheet is imported with the ‘Don’t Update’ option, the rates have now changed, so if you attempt to re-import with an alternative update selection it will no longer impact on any previous data.

- **Works**

The ‘Works’ import has an additional option for if you want to update the compliance links for either ‘WHQS’, ‘Decent Homes’ or ‘HHSRS’ as part of the import. This means that the associated module will be updated in Lifespan for any applicable works.



1. Click ‘Choose File’ and select the file you have saved.

2. Use the tick boxes as required to confirm which compliance links you want to update.

3. Click ‘Import’.

6.8.1 Import Errors

If there are any issues with the data you are trying to import i.e., missing fields/invalid values present, the software will reject the import sheet. In such instances, the ‘Result’ screen will display ‘Import Failed’ and a spreadsheet will be generated to include an ‘Outcome’ column providing further details of the error.

NOTE No changes will be implemented in Lifespan until the import is successful. If the import fails, you can update the software generated sheet with corrections as required and re-import. (There is no requirement to return to your initial spreadsheet to make the changes).

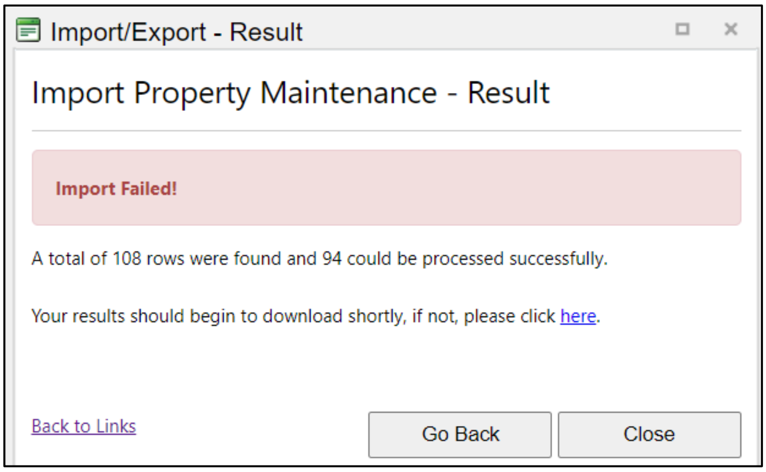


Figure 102: import failed

1. Open the software generated spreadsheet and go to the outcome column. The descriptions here will vary dependent on the problem with the data, the example below shows errors regarding the 'Works' import sheet.

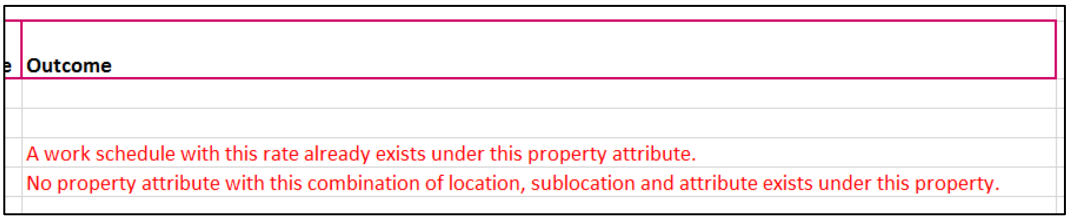


Figure 103: outcome spreadsheet

a) A work schedule with this rate already exists under this property attribute.
   - This error indicates that a user is trying to 'Insert' a work schedule that already exists against the selected attribute. The software does not allow duplicates, so in this instance, you would need to change the command to 'Update' to amend the existing work schedule. Alternatively, make sure the new work item you are adding in is being 'Inserted' against the correct attribute.

b) No property attribute with this combination of location, sublocation and attribute exists under this property.
   - This error indicates that a user is trying to either 'Insert', 'Update' or 'Delete' a work schedule against a property attribute that isn't present for the selected address. In this instance you would need to ensure that the attribute is present by first assigning the attribute to the address before trying to insert the new work schedule, or if already present, ensure the combination of location/sublocation/attribute in your import sheet matches the existing records in Lifespan.

2. Refer to the outcome column for guidance on how to correct any invalid rows and make the necessary changes to the sheet. Save the spreadsheet and return to Lifespan to re-import your data.

3. Repeat the steps above until the import is successful.

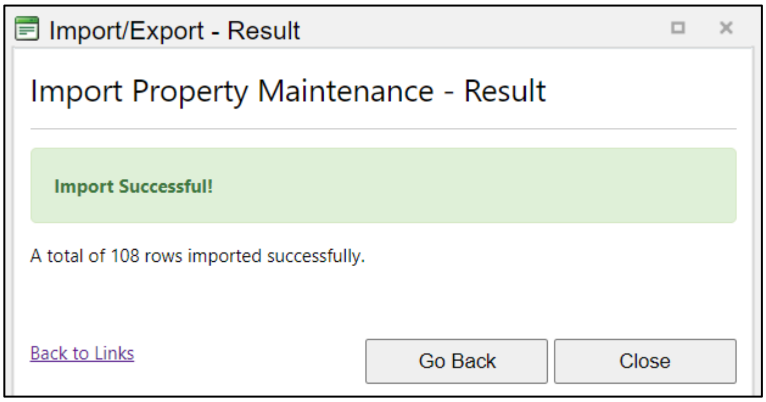


Figure 104: import successful

6.9 Creating a Survey List

Another use of the import/export function is to create survey lists – these are used to assign one or more properties to a surveyors account, which can then be downloaded to the Lifespan mobile software in preparation of surveys being undertaken. This can save time for surveyors and also ensures the correct addresses are downloaded to the mobile device.

1. In the 'Property Attributes' module, click on 'Mobile' within the 'Housekeeping' section.

Figure 105*: location of the mobile button*

2. There are two stages, firstly you will need to set up the survey list record. Under 'Survey Lists', click on 'Set up a Survey List for a User Account'.

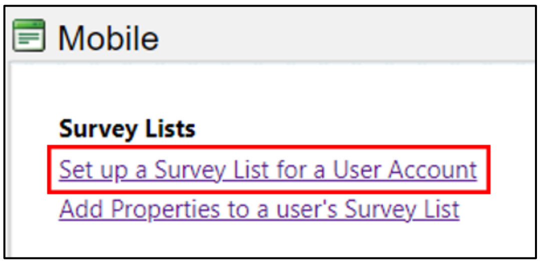


Figure 106*: set up a survey list*

3. This will bring up the survey lists options. Click 'Export' to download in excel format.

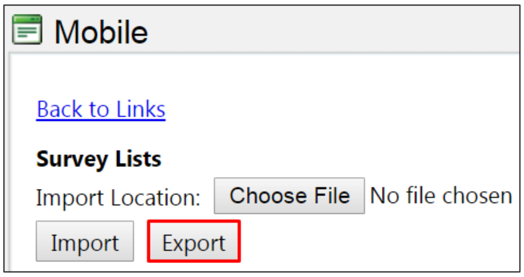


Figure 107*: exporting the survey list*

NOTE There is no 'template export' option, so the sheet will include all existing lists by default. You can either delete all existing rows before adding in a new list or use the command 'Ignore' for any rows you don't want to change.

4. You will need to input the following information.

- Username: The username for the user account you want to assign the survey list.
- Name: Text field to define the name of the list. This will be the name visible to the surveyor on their tablet.
- Command: 'Insert', 'Update', 'Delete' or 'Ignore'. How the data is processed on import.
- UpdateToNewName: Text field to change the name of an existing survey list.

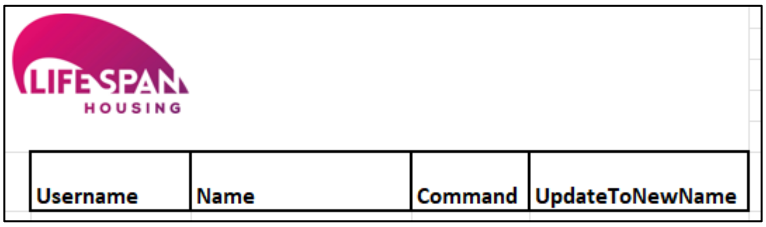


Figure 108*: survey list*

5. Complete the fields as needed and save the spreadsheet.

NOTE You can create multiple survey lists on the same sheet, each list should be on a separate row and you need to ensure that there are no duplications. i.e., the same name cannot be assigned more than once to the same user account.

6. Go back to Lifespan and this time in survey lists choose the file you have just saved and click 'import' which will save your survey list. If there are any errors in the spreadsheet, a message will appear saying it has not uploaded properly and a further spreadsheet explaining the issue for each invalid row will download. You can then amend and re-upload your list.

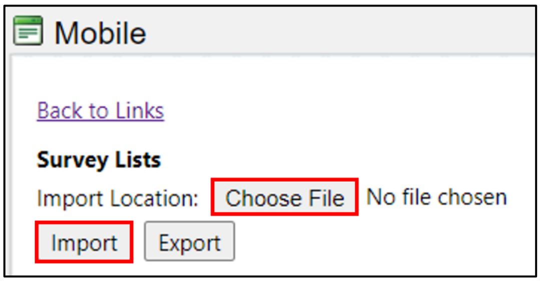


Figure 109*: importing the survey list*

7. The next step is to add properties to the list you have just created. Under 'Survey Lists', click on 'Add Properties to a user's Survey List and export.

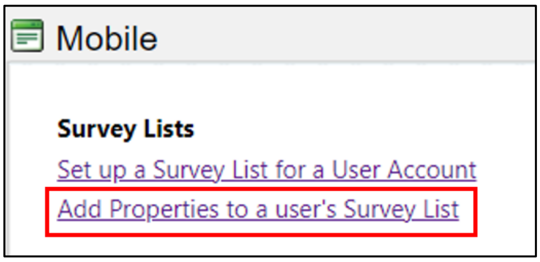


Figure 110*: add properties to a survey list*

NOTE There is no 'template export' option, so the sheet will include all properties in existing lists by default. You can either delete all existing rows before adding in the properties for your new list or use the command 'Ignore' for any rows you don't want to change.

8. You will need to input the following information.
    - Username/Name: Text fields to define the same username and name assigned to the survey list you want to assign the properties to. These fields are repeated on each row for every address being assigned.
    - UPRN/Address1: Text fields to define the UPRN and address line 1 of the property you want to assign to the list. These details need to match an existing address in Lifespan.
    - Command: 'Insert', 'Update', 'Delete' or 'Ignore'. How the data is processed on import.

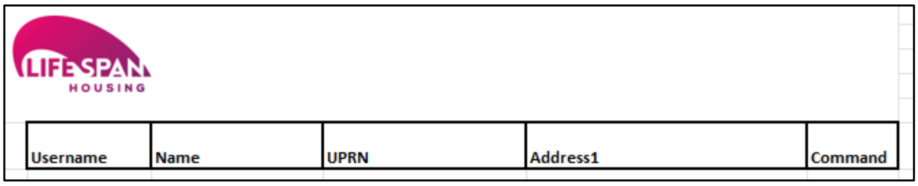


Figure 111*: add properties to survey list*

9. Complete the fields as needed and save the spreadsheet.

NOTE You can add properties to multiple survey lists on the same sheet, each property should be on a separate row and you need to ensure that there are no duplications. i.e., the same property cannot be assigned more than once to the same survey list.

10. Go back to Lifespan and this time under 'Add Properties' choose the file you have just saved and click 'Import' which will add the addresses included to your survey list.

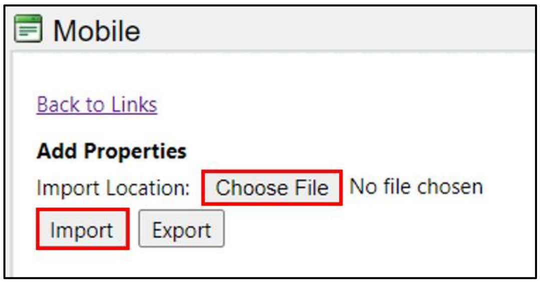


Figure 112*: import properties to survey list*

NOTE In the Lifespan mobile software, the surveyor will need to refresh their survey lists and choose the list to download – identifiable by the 'Name' used in the list created. Once this is done, all the properties will appear in their address list, ready for the survey to be completed.

7. Documents

Click on ‘Documents’ on the menu bar. Any documents or photographs attached to a property are visible on the ‘Documents’ screen.

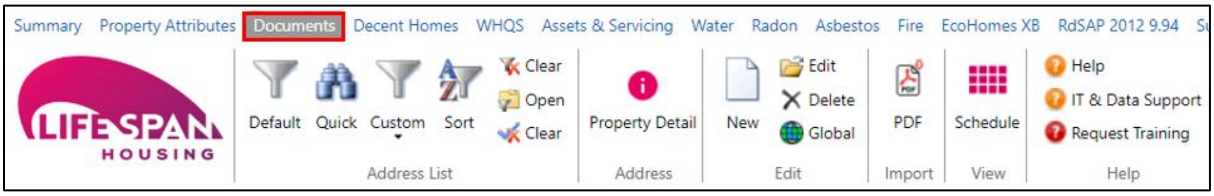


Figure 113*: Documents tab*

7.1 Adding Documents

1. Click on ‘New’.

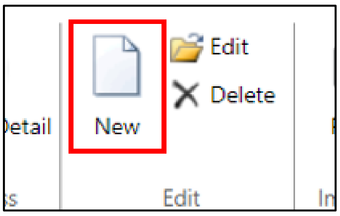


Figure 114*: new document button*

2. In the ‘Add/Edit Attachment’ screen, select a type (Image, Document or URL) and use the ‘Select’ button to choose a file to upload.

a) If ‘Image’ is selected as the type, you will have the option below to ‘Show as Main Photo?’. Tick the box to confirm if you want the uploaded attachment to be displayed as the main photograph – this is the image displayed against the property on the summary screen and property report. Ideally this should only be ticked for the front elevation image.

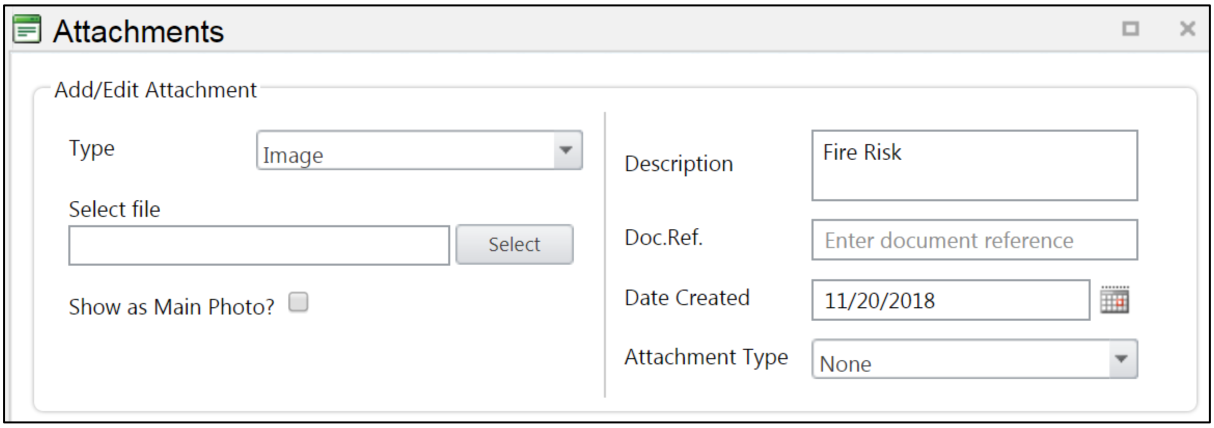


Figure 115*: adding a new document*

3. Add a description.

4. Add a document reference if required (this field is not mandatory).

5. 'Date Created' will always show today's date by default but can be manually updated if required. Type in the relevant date or select via the pop-up calendar.

6. 'Attachment Type' is used to define whether the attachment is linked to a specific module, for further guidance please refer to section **7.2 Linking Documents to Specific Modules.**

7. Click 'Save' to upload your attachment.

7.2 Linking Documents to Specific Modules

1. If the attachment being uploaded relates to a specific module, you can utilise the 'Attachment Type' to select the applicable module from the list. If not, 'None' will be selected by default.

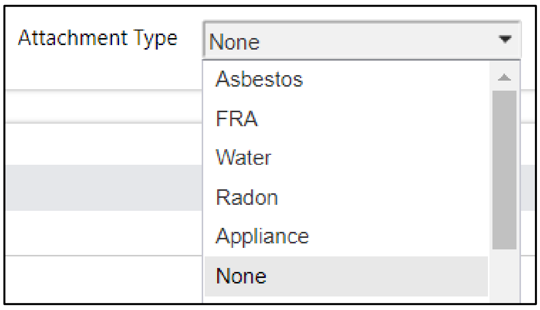


Figure 116: *linking a document*

2. When selected, an icon for asbestos ( ), fire ( ), water ( ), radon ( ) or appliance ( ) will appear to the left of the attachment to show which module it is linked to.

3. If 'Asbestos' or 'Water' have been linked, the attachment will also show under the attachments section in the selected module tab.

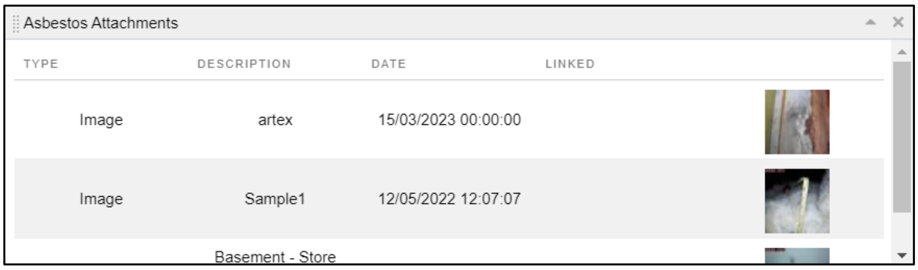


Figure 117: *asbestos attachments*

4. To remove an existing link, edit the attachment, change the attachment type to 'None' and save.

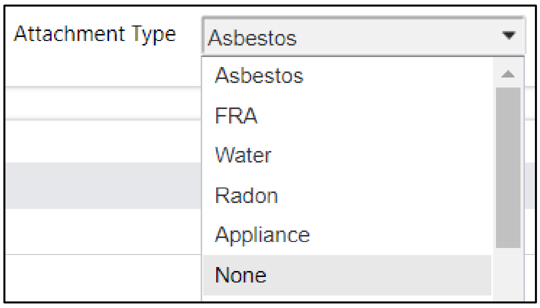


Figure 118: *removing the link*

7.3 Linking Documents to Property Attributes

1. If the attachment being uploaded relates to a specific attribute, you can utilise the 'Attachment Links' to add a link. Select 'Add new attachment link'.

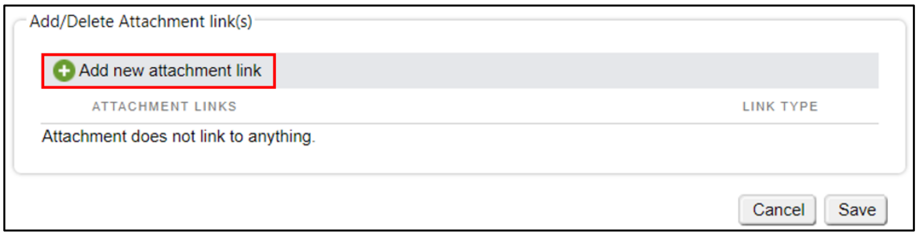


Figure 119: add an attachment link

2. For 'Link Type' choose property attribute, then select the relevant attribute from the drop-down list. Click 'Insert' and then 'Save'.

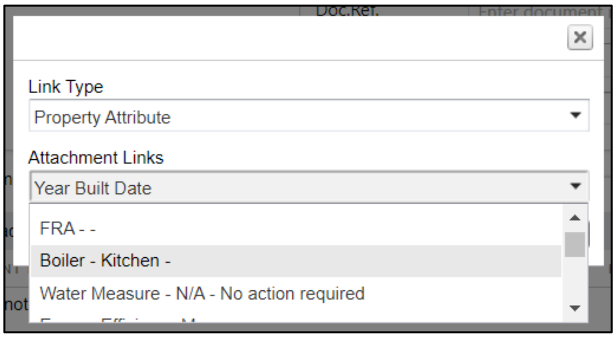


Figure 120: choose an attachment link

3. The house icon ( ) then appears to the left of the document to indicate it has been successfully linked. Similarly, a paperclip icon ( ) will now be seen to the right of the attribute name in the property attributes tab.

4. To remove an existing link, edit the attachment in the documents tab and press the bin icon next to the attachment. Click 'Save'.

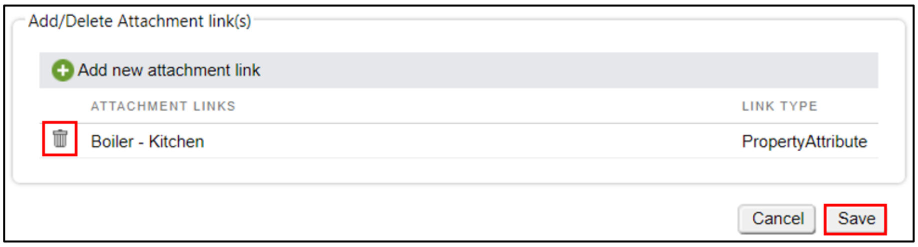


Figure 121: *delete an attachment link*

5. Alternatively, you can create an attachment link via the ‘Property Attributes’ module by selecting an existing attribute and clicking on either the file or photo button to link an attachment.

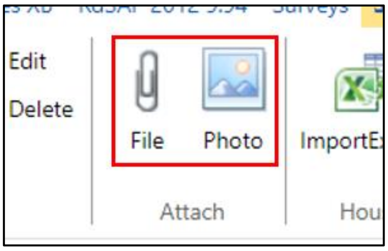


Figure 122: *attach a file or photo*

6. Similarly, selecting an assessment from the asbestos or fire module and clicking on either the file or photo button will create a link to the assessment and module.

7.4 Editing Documents

1. Select the record of the existing document you want to edit.

2. Click ‘Edit’.

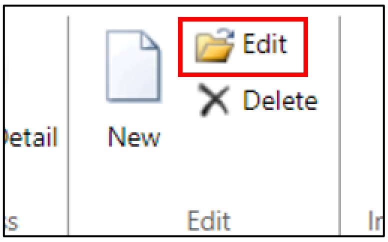


Figure 123: *edit button*

3. This will open the add/edit attachments screen. Make any changes as required and click ‘Save’.

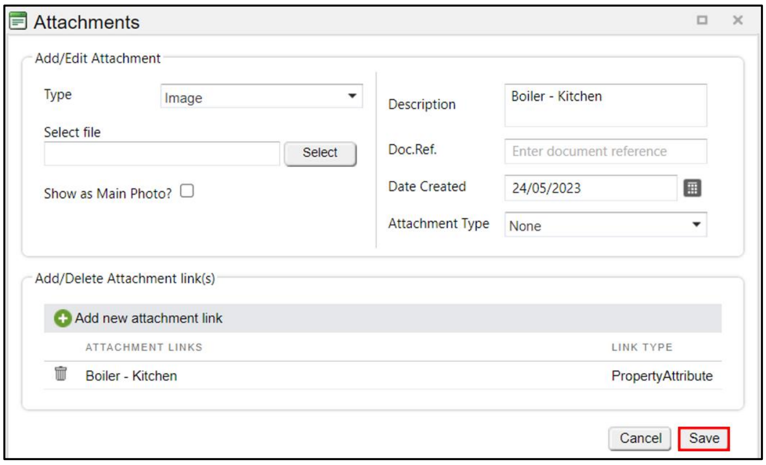


Figure 124: *edit an existing document*

7.5 Deleting Documents

1. Select the record of the existing document you want to delete.

2. Click 'Delete'.

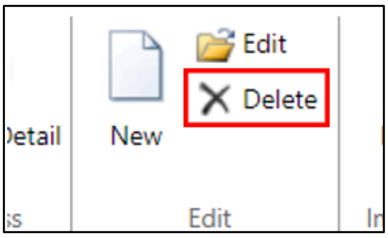


Figure 125: *delete button*

3. Click 'Remove' to confirm.

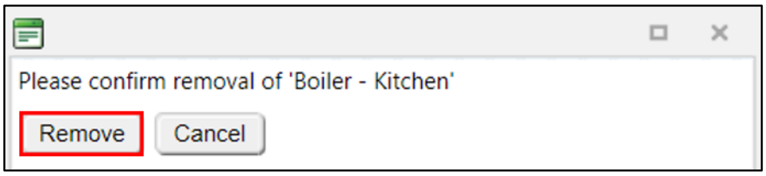


Figure 126: *confirm removal*

8. Housing Standards

Depending on which area of the country you reside in, you will have to follow the relevant housing standards. In England, this is 'Decent Homes', for Wales 'Welsh Housing Quality Standards' (WHQS) and for Scotland 'Scottish Housing Quality Standards' (SHQS). Each standard has an applicable module in Lifespan to store the assessment data at property level.

8.1 Decent Homes Assessments

Click on ‘Decent Homes’ on the menu bar.

Figure 127: *location of the 'Decent Homes' module*

Decent Homes compliance information is presented in widget form. For more information on how to use widgets, please refer to section **4. The Summary Screen.**

In addition to the standard filtering options, there is an additional filter in this module which can be used to select all properties either containing/not containing decent homes data or to show compliant/non-compliant properties. Click on the arrow below the decent homes icon to select the relevant option from the drop down list.

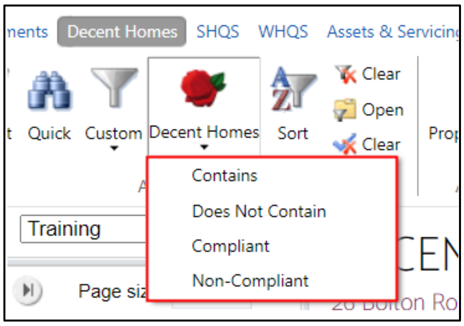


Figure 128: decent homes filter

8.1.1 Adding Decent Homes Assessments

1. Click ‘New’

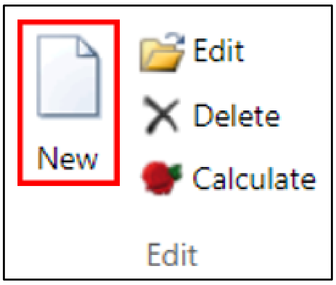


Figure 129: *new decent homes assessment*

2. Select the dwelling type and enter the survey date. Select the compliance overridden status and enter a reason if possible. Enter any comments at this stage and click ‘Save’.

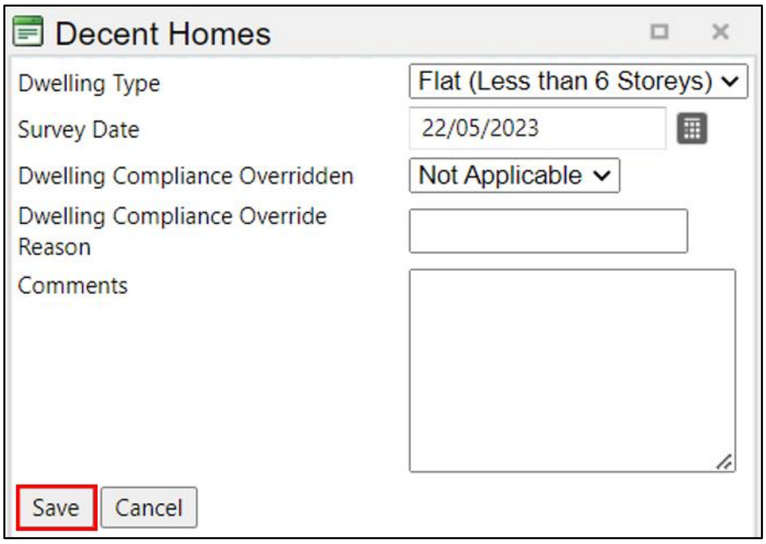
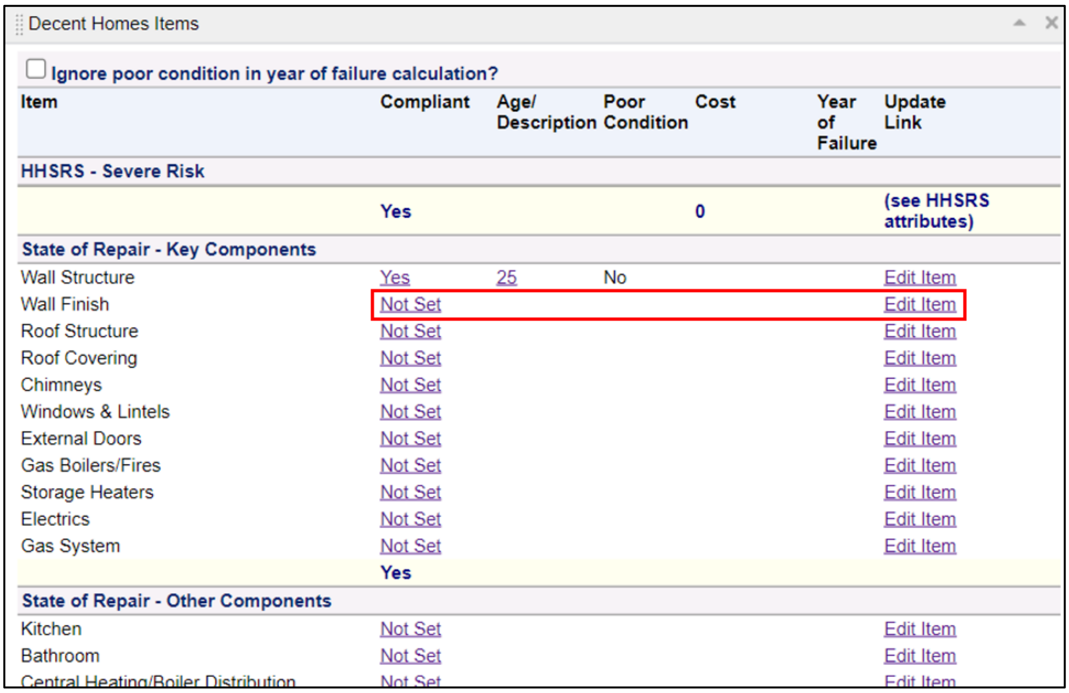


Figure 130: *new assessment details*

The information entered so far will displayed within the 'Decent Homes Header' widget.

3. Back on the Decent Homes screen, work through the assessment - editing each component within the 'Decent Homes Items' widget. To update you can click on either the 'Not Set' or 'Edit Item' links found to the right of the attribute name.



Decent Homes Items

Ignore poor condition in year of failure calculation?

Item	Compliant	Age/ Description	Poor Condition	Cost	Year of Failure	Update Link
HHSRS - Severe Risk						
	Yes			**0**		**(see HHSRS attributes)**
State of Repair - Key Components						
Wall Structure	Yes	25	No			Edit Item
Wall Finish	Not Set					Edit Item
Roof Structure	Not Set					Edit Item
Roof Covering	Not Set					Edit Item
Chimneys	Not Set					Edit Item
Windows & Lintels	Not Set					Edit Item
External Doors	Not Set					Edit Item
Gas Boilers/Fires	Not Set					Edit Item
Storage Heaters	Not Set					Edit Item
Electrics	Not Set					Edit Item
Gas System	Not Set					Edit Item
	Yes					
State of Repair - Other Components						
Kitchen	Not Set					Edit Item
Bathroom	Not Set					Edit Item
Central Heating/Boiler Distribution	Not Set					Edit Item

Figure 131: decent homes items

4. Populate the age of the component using the drop down list. The 'Item is in poor condition?' tick box should be used only when applicable for the selected component. Click 'Save'.

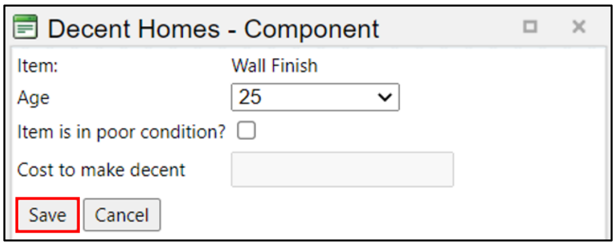
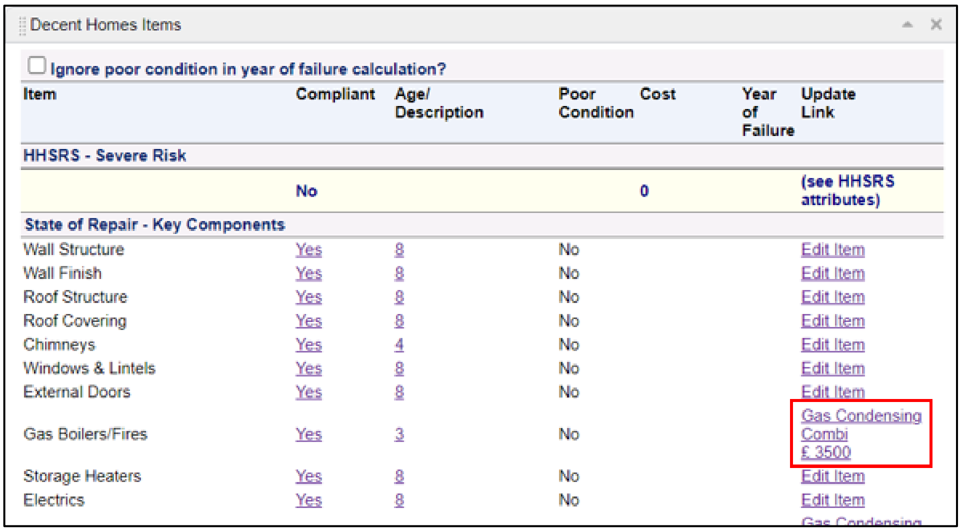


Figure 132: decent homes - component

5. Repeat steps 3 and 4 until the assessment is complete.

   If you have existing maintenance data in your account against the selected property, you may notice when working through the assessment that some of the components auto populate. Any instance of this is down to the compliance links between the 'Property Attributes' and 'Decent Homes' modules. For further information on compliance links please refer to section **5.5 Planned Maintenance.**

6. Linked works will be displayed under the 'Update Link' column as below. Click on the description to open the work schedule details.


Decent Homes Items

Ignore poor condition in year of failure calculation?

Item	Compliant	Age/ Description	Poor Condition	Cost	Year of Failure	Update Link
HHSRS - Severe Risk						
	No			**0**		**(see HHSRS attributes)**
State of Repair - Key Components						
Wall Structure	Yes	8	No			Edit Item
Wall Finish	Yes	8	No			Edit Item
Roof Structure	Yes	8	No			Edit Item
Roof Covering	Yes	8	No			Edit Item
Chimneys	Yes	4	No			Edit Item
Windows & Lintels	Yes	8	No			Edit Item
External Doors	Yes	8	No			Edit Item
Gas Boilers/Fires	Yes	3	No			Gas Condensing Combi £ 3500
Storage Heaters	Yes	8	No			Edit Item
Electrics	Yes	8	No			Edit Item

Figure 133: decent homes compliance links

8.1.2 Editing Decent Homes Assessments

1. To edit the general assessment information, click on 'Edit'.

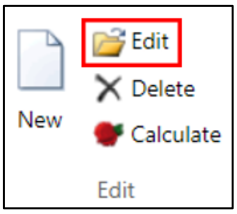


Figure 134: *edit assessment button*

2. Enter the updated details and click ‘Save’.

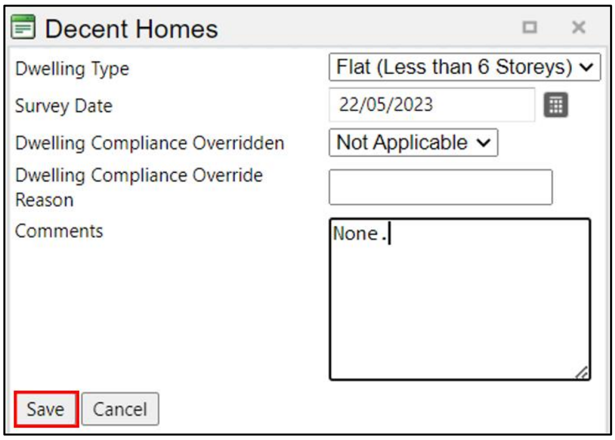


Figure 135*: editing a decent homes assessment*

3. To edit any of the components, you can click on either the ‘Not Set’ or ‘Edit Item’ links found to the right of the attribute name.

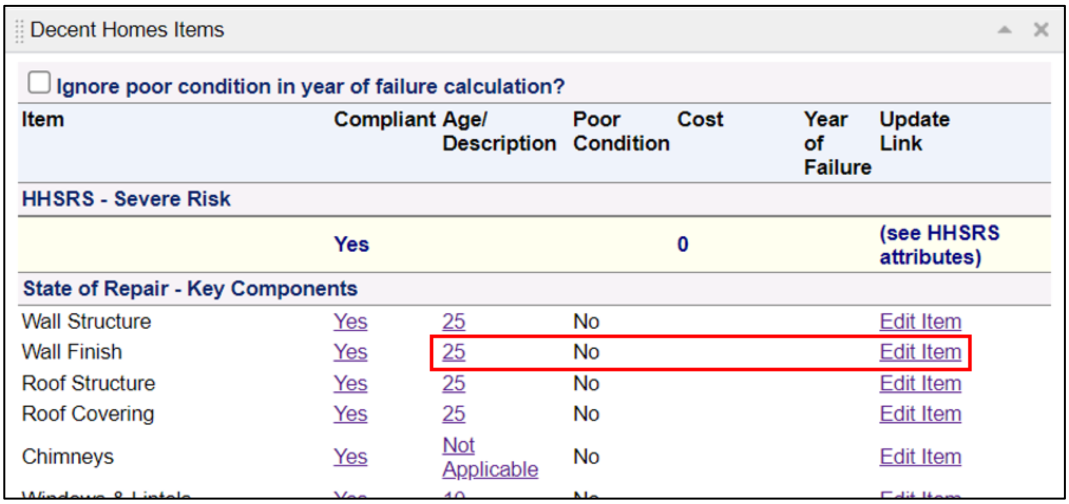


Figure 136*: editing decent homes attributes*

4. Enter the updated details and press ‘Save’.

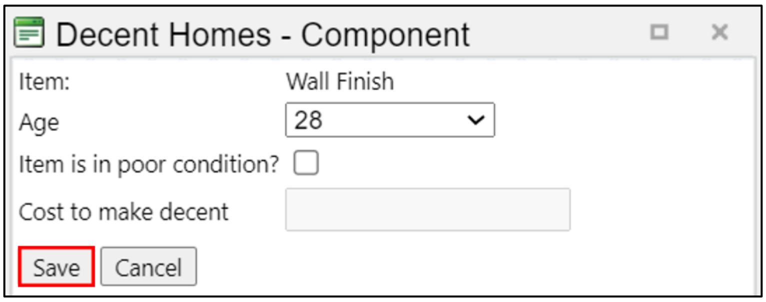


Figure 137*: saving the changes*

8.1.3 Deleting Decent Homes Assessments

1. To remove an existing decent homes assessment, click 'Delete'.

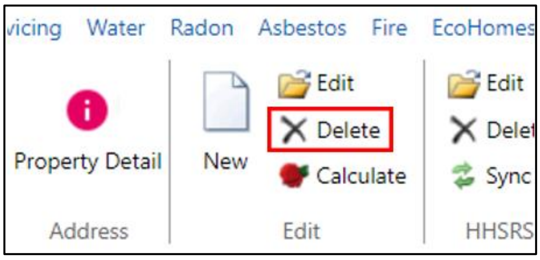


Figure 138: the delete button

2. Click 'Remove' to confirm.

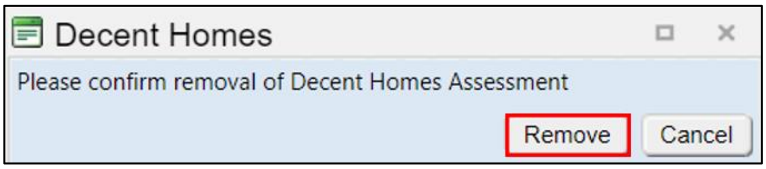


Figure 139: confirm the removal

8.1.4 Calculating Decent Homes Assessments

You can calculate assessments individually or for multiple properties by using the function button in the ribbon pane. This will refresh the compliance status based on any changes made to the data (whether this be after importing assessment data in bulk or making changes to the planned maintenance data i.e., completing works that use compliance links).

1. To calculate one or more assessments, click 'Calculate'.

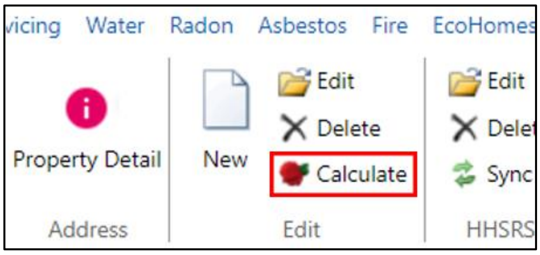


Figure 140: decent homes calculate button

2. Choose to update either highlighted, ticked or all properties and click 'Calculate'.

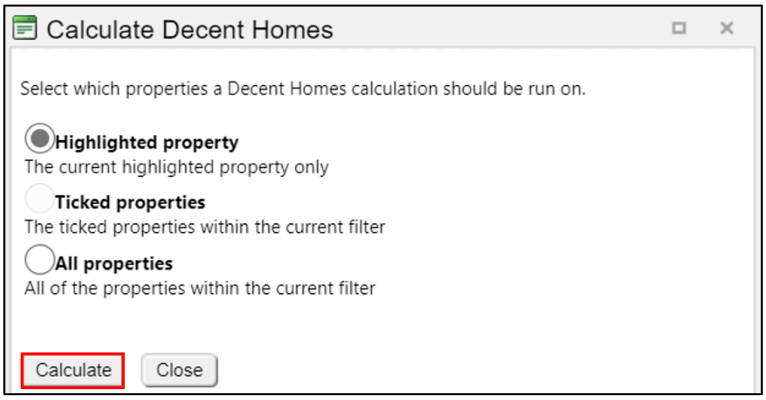


Figure 141: calculate decent homes

3. A confirmation screen will appear once calculated. An email will also be generated and sent to the address linked to the user account with the same confirmation details.

8.2 Welsh Housing Quality Standards Assessments (WHQS)

Click on 'WHQS' on the menu bar.

Figure 142: *location of the 'WHQS' module*

In addition to the standard filtering options, there is an additional filter in this module which can be used to select all properties either containing or not currently containing WHQS data. Click on the arrow below the radon icon to select either 'Contains' or 'Does Not Contain' from the drop down list.

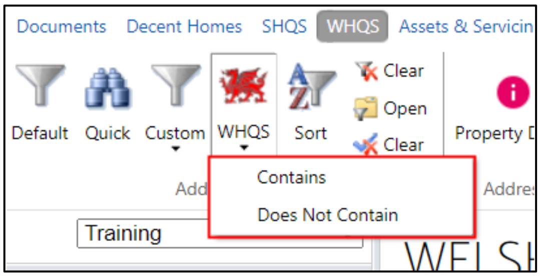


Figure 143: WHQS filter

The information is presented in separate windows, each containing a different dataset.

- Property – This section will display the front elevation image for the selected address.
- General Information – This section will display some background data for the selected address i.e. assessment version, name of surveyor and date of assessment. This information is pulled through from the existing survey data.

- Compliance – This section provides details on the compliance of the selected property, to show whether or not the dwelling is compliant, whether the compliance has been overridden and accompanying notes.
- Reports – Click the 'Property Passport' link to download a pdf document. The property passport contains information relating to retrofit works on the selected address, including energy information, completed retrofit measures and recommended medium term plans.
- Assessment – This section displays the assessment data for the selected address, detailing each question and the compliance status for each.

8.2.1 Adding/Editing WHQS Assessments

1. To add a new assessment or edit existing data, click 'Assessment'.

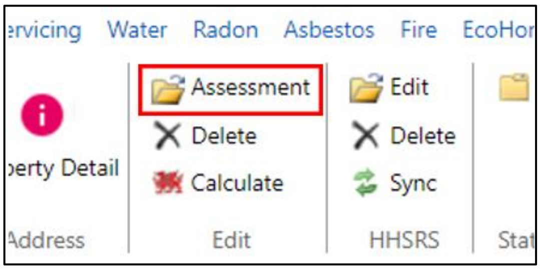


Figure 144: WHQS assessment button

2. By default, the software will open in the latest template version (2023). If there is existing data in previous version you can access this by clicking the link in the bottom left of the screen 'WHQS 2005 Assessment'. If no previous data exists, you have the option to 'Create One' by clicking the link.

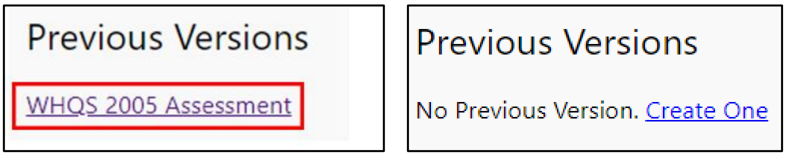


Figure 145: previous WHQS assessment

3. The question summary is on the left of the screen, navigate through the assessment either by selecting from the list or using the 'Next' button at the bottom of each section.

4. Start the assessment by entering the 'Surveyor Name' in the free-text field, type in a 'Survey Date' or select via the calendar icon and apply a preset is required.

NOTE The preset options are 'None' (this is the default option), 'House', 'Flat (Self-contained)' or 'Flat (Not self-contained). Dependent on the preset selected, some of the questions will automatically populate with 'Not Applicable' where appropriate.

5. Work through the remainder of the assessment, using the drop down fields to select the relevant values. As you complete sections, this will be indicated by a green 'thumbs up' icon on the left next to the applicable part.

Figure 146: WHQS progress indicator

6. Some questions in the assessment are linked to the HHSRS data. In these instances, if a HHSRS assessment has been completed for the property, the applicable value will be pulled through giving you an indication of which value should be selected from the drop-down list.

7. Once the assessment has been fully populated, the completion status will be updated to show either 'Compliant' or 'Non-Compliant'.

Figure 147: compliance status

8. Click 'Save' once completed. The 'Close' button can be pressed at any time to return to the WHQS module.

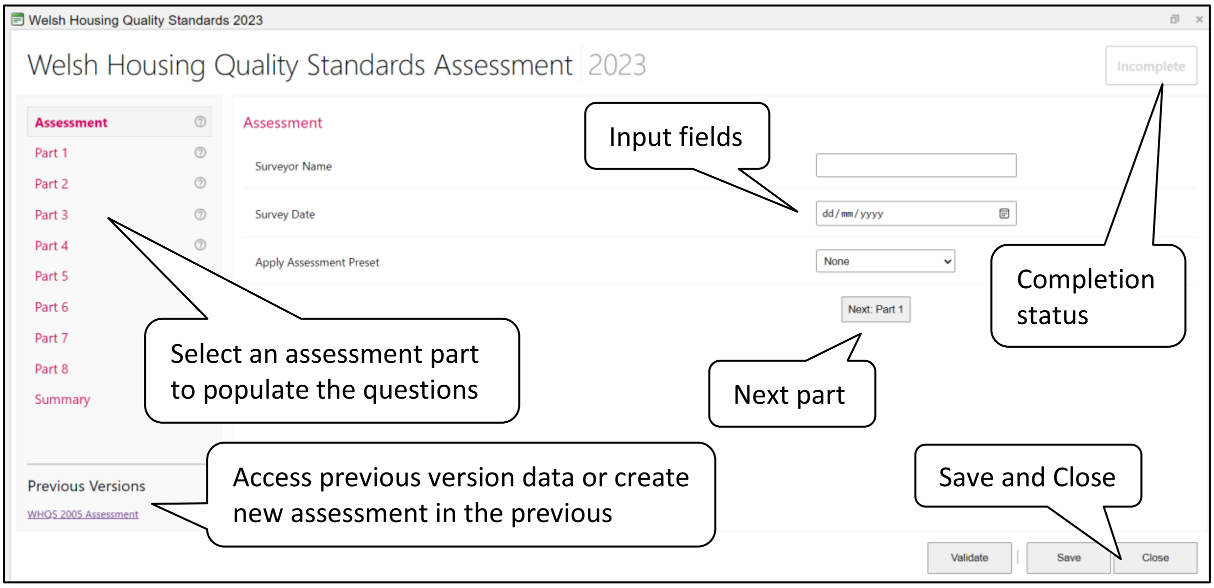


Figure 148: Welsh housing quality standards 2023

8.2.2 Deleting WHQS Assessments

1. To remove an existing WHQS assessment, click 'Delete'.

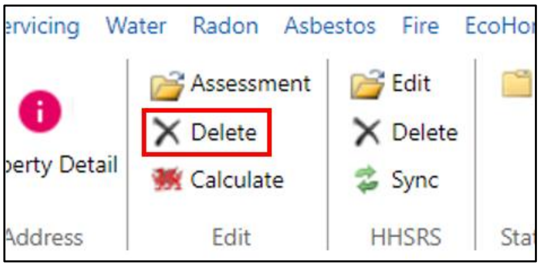


Figure 149: the delete button

2. Click 'Delete' to confirm.

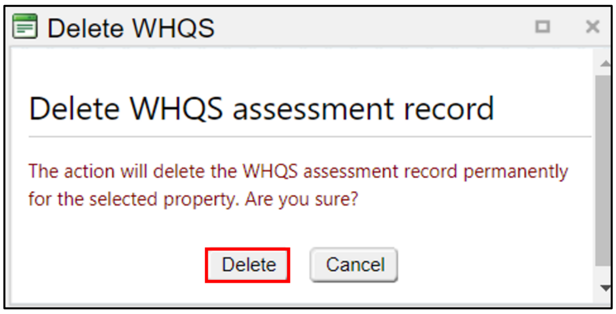


Figure 150: confirm the removal

8.2.3 Calculating WHQS Assessments

You can calculate assessments individually or for multiple properties by using the function button in the ribbon pane. This will refresh the compliance status based on any changes made to the data (whether this be after importing assessment data in bulk or making changes to the HHSRS or energy data i.e., updating items that use compliance links).

1. To calculate one or more assessments, click 'Calculate'.

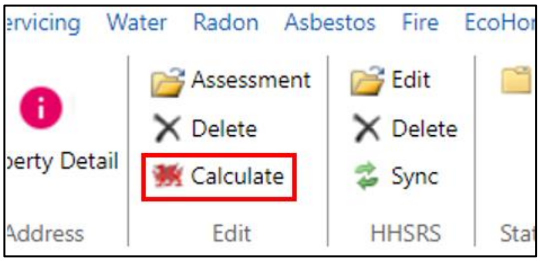


Figure 151: WHQS calculate button

2. Choose to update either highlighted, ticked or all properties and click 'Calculate'.

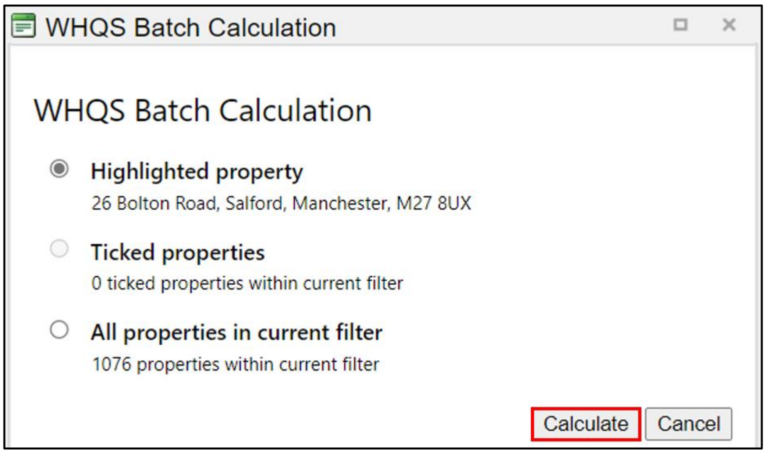


Figure 152: WHQS batch calculation

3. A results screen will appear once calculated outlining the success rate for the selected properties. If there are any calculation errors, an outcomes sheet will be generated providing further details.

9. Assets & Servicing

Click on 'Assets & Servicing' on the menu bar. This module is used to store asset details and all corresponding service history information.

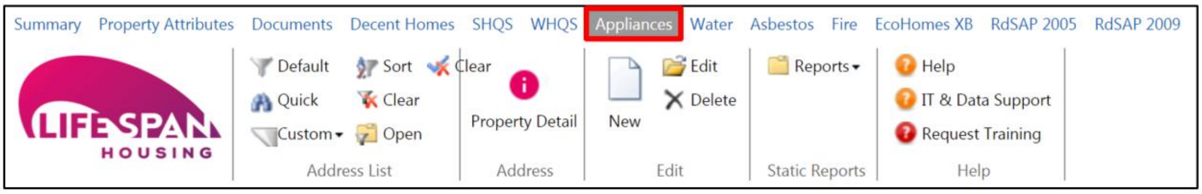


Figure 153: assets & servicing module

The module data is split into three sections. At the top of the screen each asset will be listed on a new row and underneath you will find the details and service history information for the selected asset.

9.1 Adding a New Asset Record

1. To create a new asset record, click new.

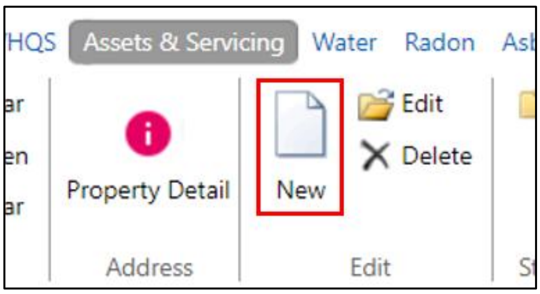


Figure 154: adding a new asset

2. In the 'Servicing & Inspection' dialog box, complete the fields in relation to the appliance, installation and service records by choosing from the drop-down lists or typing in the information.

NOTE The drop down list is custom defined as it is updated automatically each time a new value is entered. This is to aid data consistency as each account user will have access to the same list.

Once complete, click 'Save'.

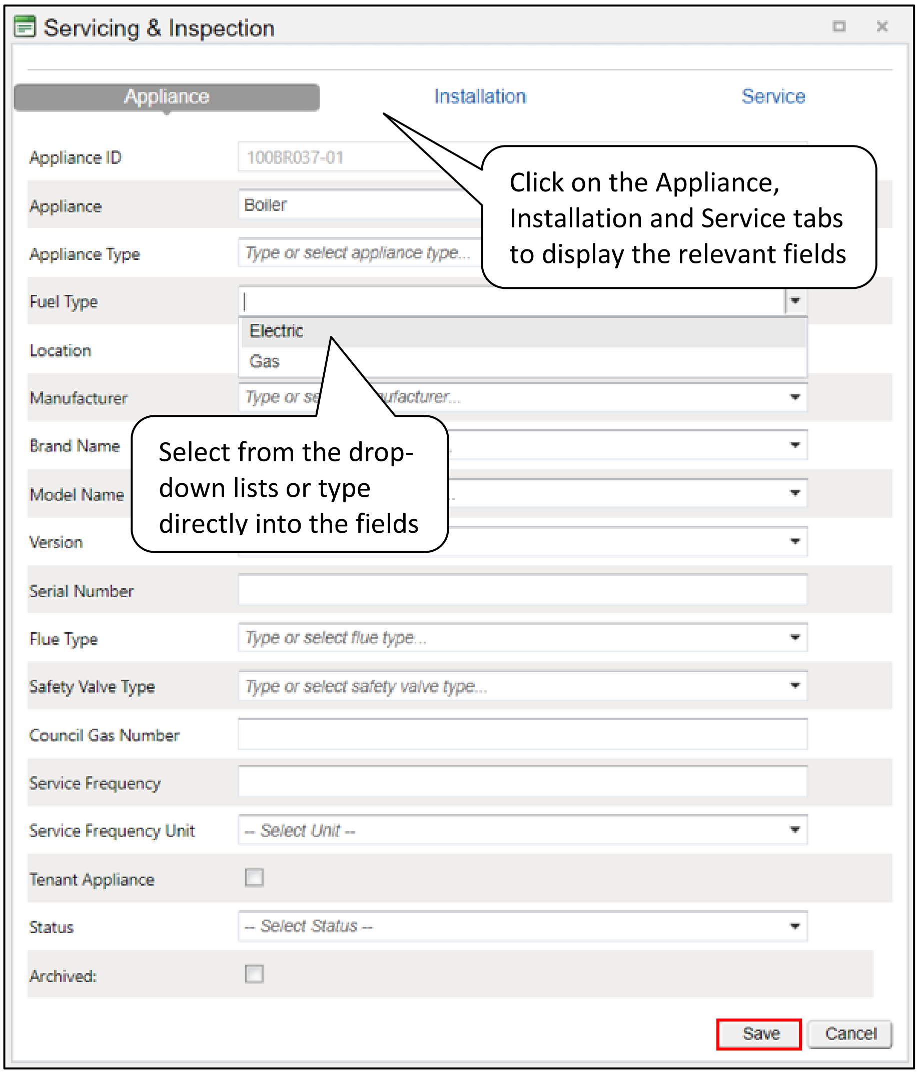


Figure 155: new appliance details

3. Returning to the main screen you will see the new asset entry listed, click on the asset description to display the details and service history at the bottom of the screen.

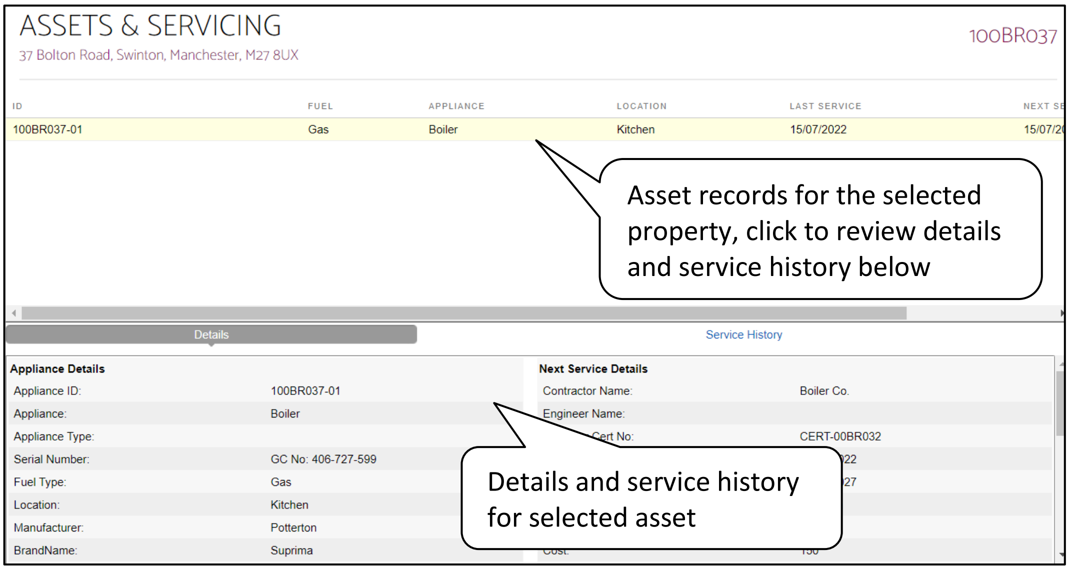


Figure 156: appliances screen

9.2 Editing an Asset Record

1. Select the record you want to amend and click 'Edit'.

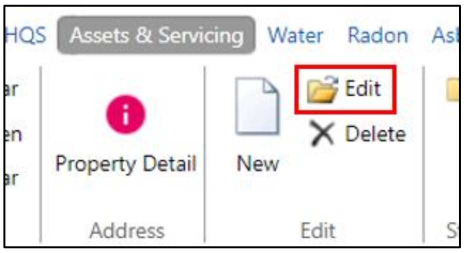


Figure 157: edit an asset record

2. The 'Servicing & Inspection' dialog box will reopen allowing you to amend the previously saved information. Make the required changes to the data and click save.

9.3 Delete an Asset Record

1. Select the record you want to remove and click 'Delete'.

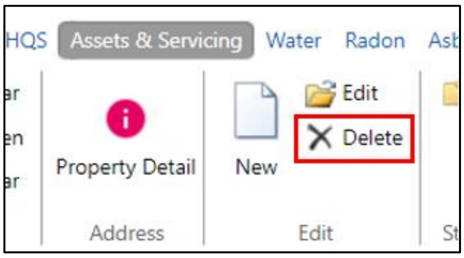


Figure 158: delete an asset record

2. Click delete to confirm removal of the record.

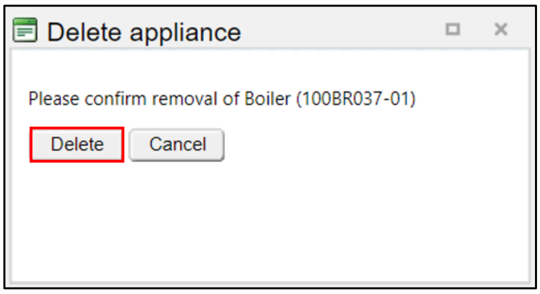


Figure 159: confirm removal of asset record

9.4 Adding a New Service History Record

1. Select the record of the asset you want to add the service history information to and go to the 'Service History' tab. Click on 'New Service' to add a new service record.

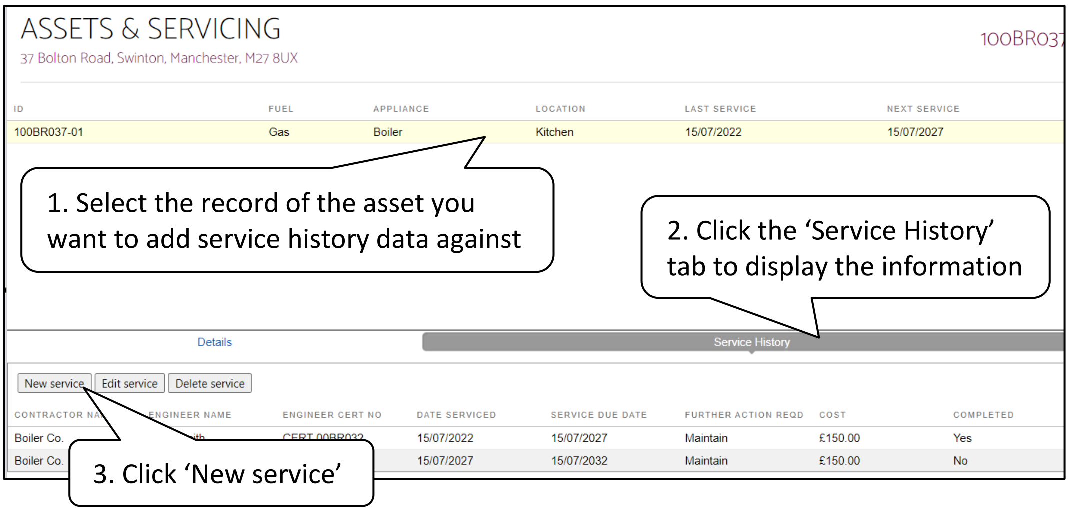


Figure 160: new service history record

2. Enter the details of the service in the fields provided, then click 'Save'.

Figure 161: add new service history

Your new record will now be displayed under the service history section of applicable asset.

9.5 Editing a Service History Record

1. Select the record of the service history you want to amend and click 'Edit service'.

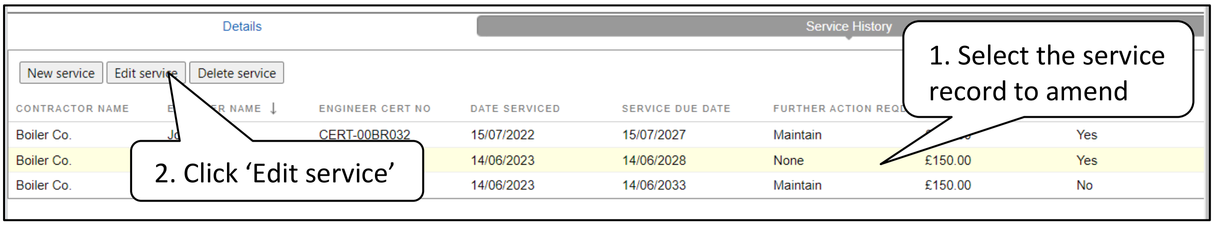


Figure 162: edit a service record

2. The 'Edit service history' dialog box will open allowing you to amend the previously saved information. Make the required changes to the data and click save.

9.6 Deleting a Service History Record

1. Select the record of the service history you want to delete and click 'Delete service'.

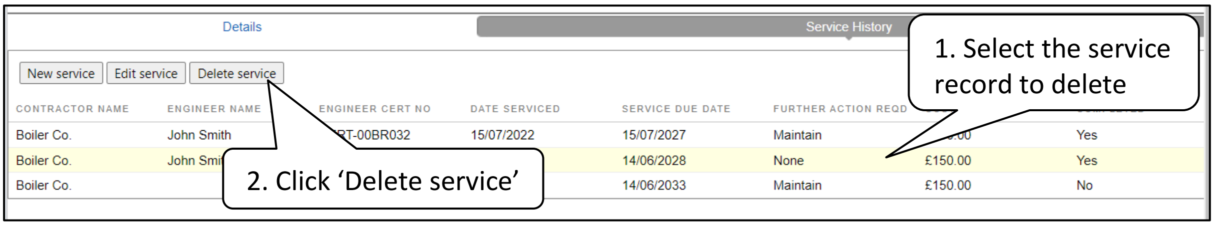


Figure 163: delete a service record

2. Click 'Delete' to confirm removal of the record.

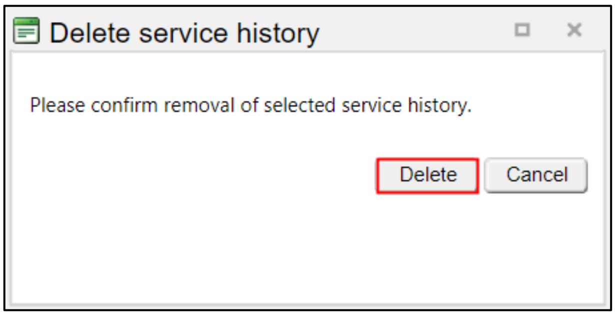


Figure 164: confirm removal of service record

10. Water

Click on 'Water' on the menu bar. The water module is used to store water risk assessments and details of associated samples and measures. The data is stored in widget format, displaying each element in a separate window.

Figure 165: location of the water module

In addition to the standard filtering options, there is an additional filter in this module which can be used to select all properties either containing or not currently containing water data. Click on the arrow below the water icon to select either 'Contains' or 'Does Not Contain' from the drop down list.

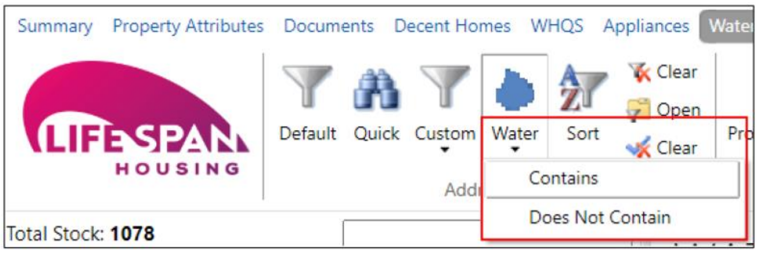


Figure 166: water filter

10.1 Adding a New Water Risk Assessment

1. To add a new water assessment, click ‘New’.

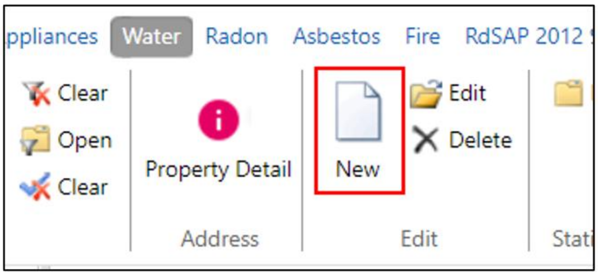


Figure 167: new water risk assessment

2. Populate the ‘Water Risk Assessment Details’ by completing each relevant field.

   The majority are free text comment boxes allowing you to follow the format of your risk assessment. For the date fields, you can either type in manually or click on the calendar icon to select a date. To attach a file, click ‘Choose File’ and select the document you want to upload.

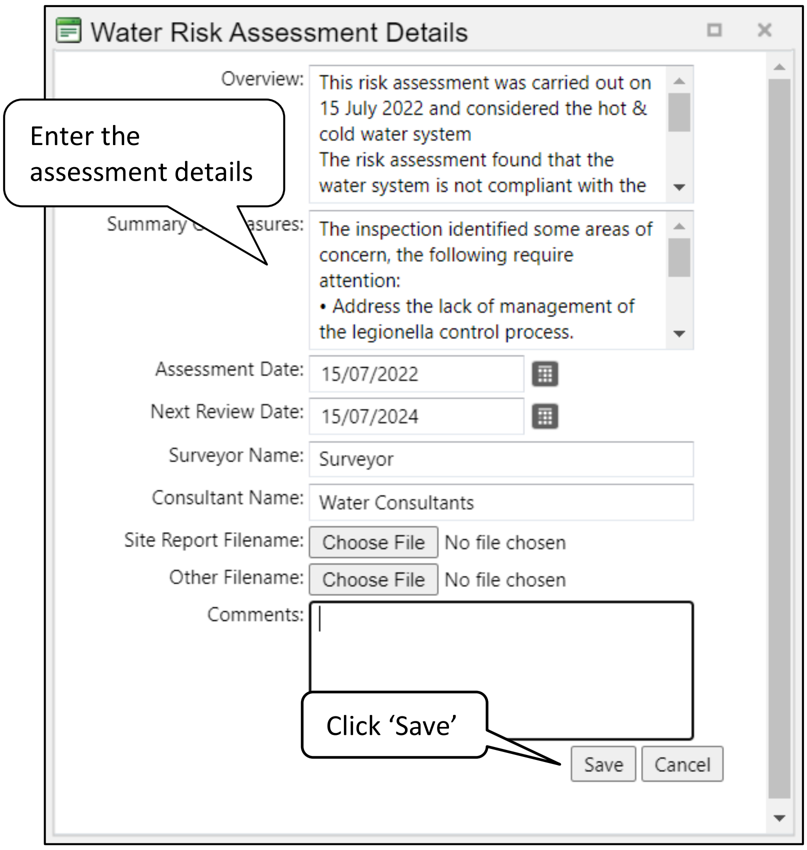


Figure 168: new water risk assessment details

3. When you return to the main screen, you will see the information updated in the ‘Water Risk Assessment’ widget.

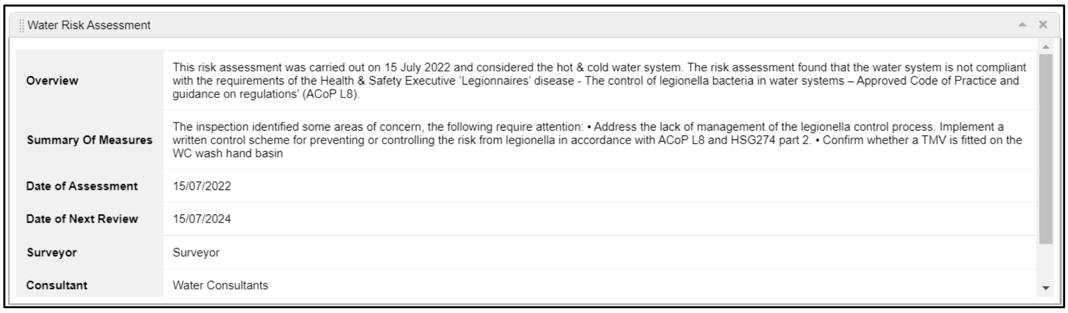


Figure 169: completed water risk assessment

10.2 Editing a Water Risk Assessment

1. To amend an existing water assessment, click ‘Edit’.

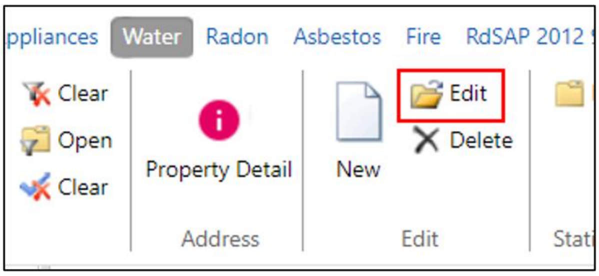


Figure 170: edit a water risk assessment

2. The water risk assessment details window will appear. Make any changes as necessary and click ‘Save’.

10.3 Deleting a Water Risk Assessment

1. To remove an existing water assessment, click ‘Delete’.

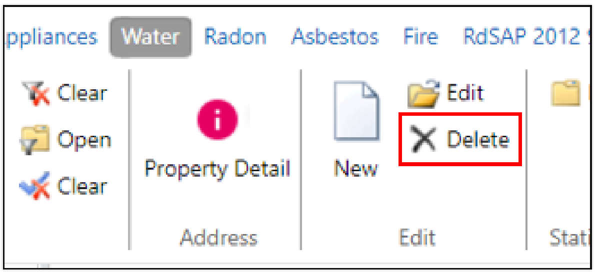


Figure 171: delete an assessment

2. Click ‘Remove’ to confirm deletion of the assessment.

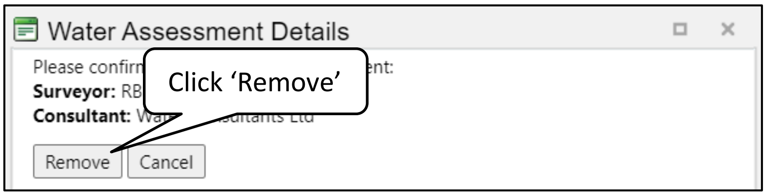


Figure 172: confirm deletion

10.4 Water Attachments

The water attachments widget displays all linked attachments for the selected property. This will include all site report, certificate or other files added within the water module, as well as any additional attachments added within the documents module. For guidance on how to add additional attachments or edit/ delete existing water attachments, please see section **7. Documents**. You can refer to **7.2 Linking Documents to Specific Modules** to link to the water module).

1. Click on the icon to the right of the description to generate a download of the attachment.

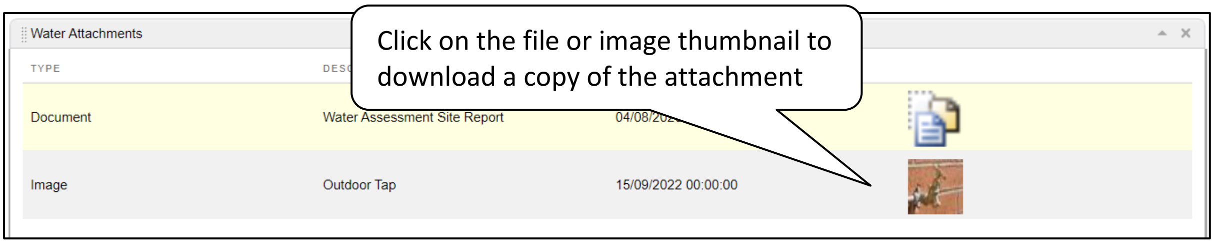


Figure 173: download a water attachment

10.5 Adding a New Water Sample

The water samples widget displays a record for each sample taken for the selected property.

1. To create a new sample record, click 'New' within the water samples widget.

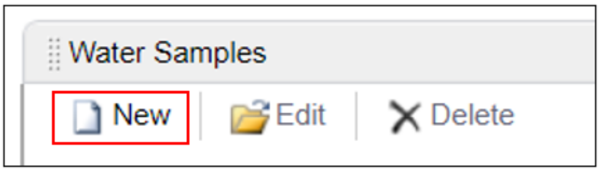


Figure 174: new water sample

2. Populate the 'Water Sample Details' by completing each relevant field.

   The majority are free text comment boxes however these are also automatic drop-down fields, meaning each time you add a new value it will be remembered on your next sample input. This facilitates easier inputting for frequently used values and maintains data consistency. Tick boxes are used to record the presence of coliforms, Ecoli and legionella, simply click in the relevant box to confirm if detected in the sample collected. For the date fields, you can either type in manually or click on the calendar icon to select a date. To attach a file, click 'Choose File' and select the document you want to upload.

3. Click 'Save'.

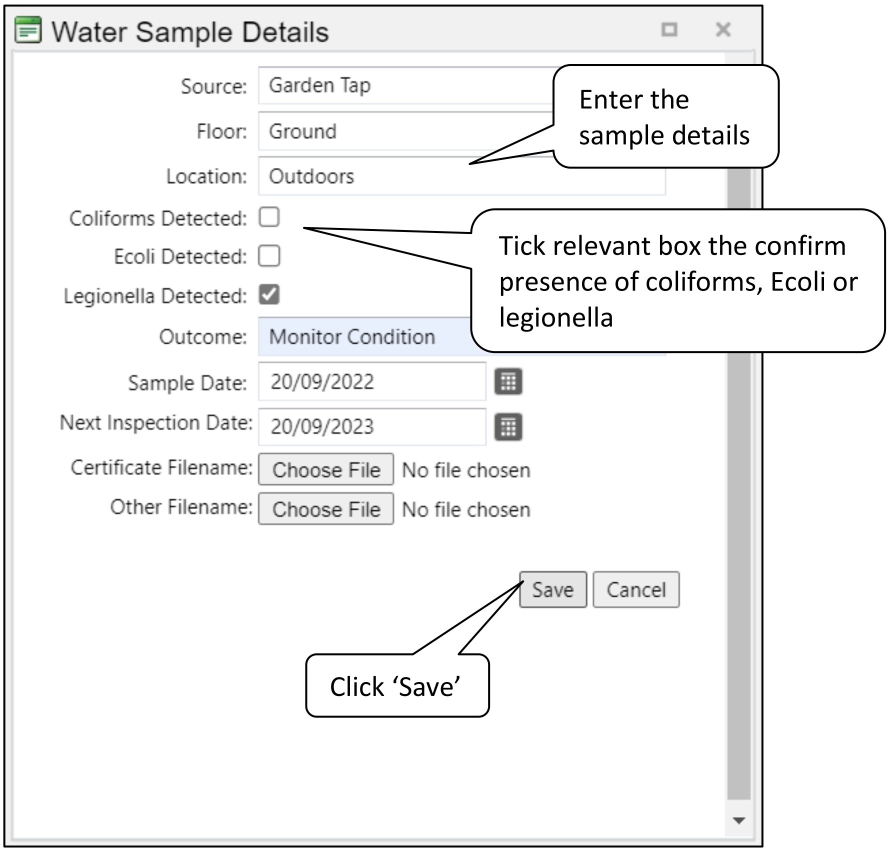


Figure 175: water sample details

10.6 Editing a Water Sample

1. To amend an existing water sample, select the sample from the list and click 'Edit' within the water samples widget.

2. The water samples window will appear. Make any changes as necessary and click 'Save'.

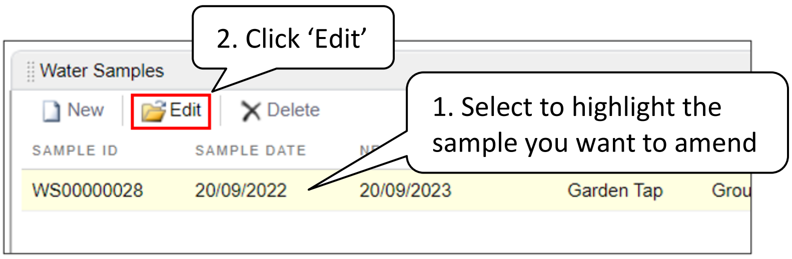


Figure 176: water sample edit screen

10.7 Deleting a Water Sample

1. Select the record of the water sample you want to remove and click on ‘Delete’.

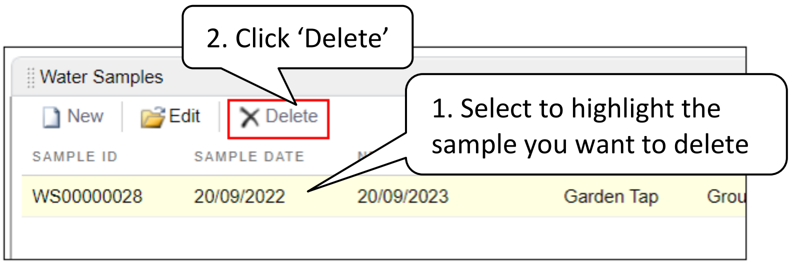


Figure 177: delete a water sample

2. Click ‘Remove’ to confirm deletion of the record.

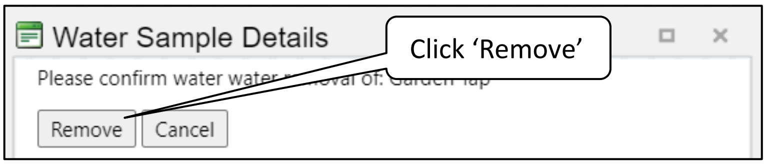


Figure 178: confirm deletion

10.8 Adding a New Water Measure

The water measures widget displays a record for each measure for the selected property. By adding in a measure, you are creating a new work item against the address. As well as the measure being displayed in the water module, the measure will be added as a planned maintenance item within the ‘Property Attributes’ module. Please refer to section **5. Property Attributes** for further guidance on how to view, edit and mark works as complete.

1. To add a new measure, click ‘New’ within the water measures widget.

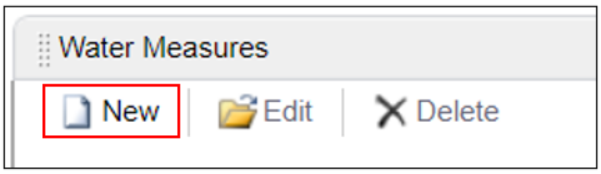


Figure 179: new water measure

2. Populate the ‘Water Measures Details’ by completing each relevant field.

   The main input method for this window is by selecting from drop-down lists with pre-set values. The free text comment boxes are also automatic drop-down fields, meaning each time you add a new value it will be remembered on your next sample input. This facilitates easier inputting for frequently used values and maintains data consistency.

3. Click ‘Save’.

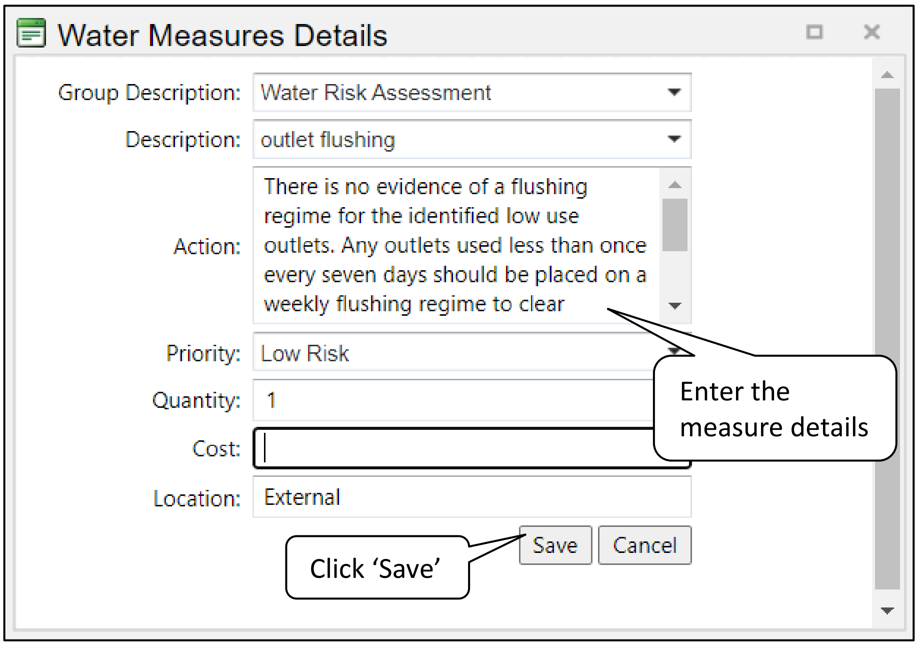


Figure 180: water measure details

10.9 Editing a Water Measure

1. To amend an existing water measure, select the measure from the list and click ‘Edit’ within the water measures widget.

2. The water measures window will appear. Make any changes as necessary and click ‘Save’.

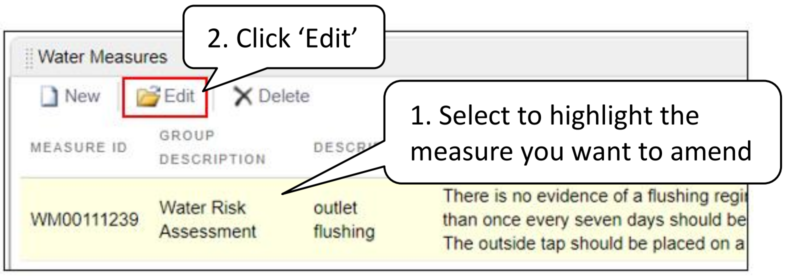


Figure 181: edit a water measure

10.10 Deleting a Water Measure

1. Select the record of the water measure you want to remove and click on ‘Delete’.

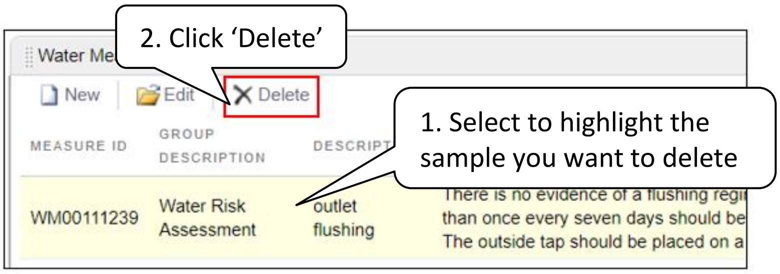


Figure 182: delete a water measure

2. Click 'Remove' to confirm deletion of the record.

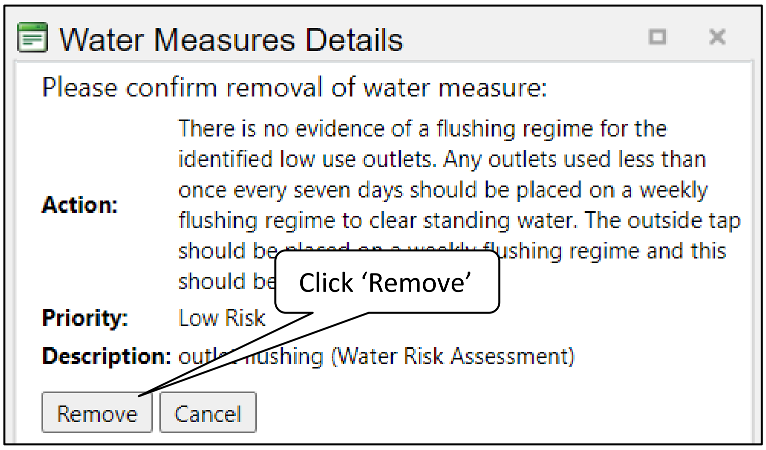


Figure 183: confirm deletion

10.11 Adding Water Events

Each time you add or edit a risk assessment, an event is created and stored within this widget to keep track of any changes. The software presents this data in a table format to include a start and end date, name, description and completion status.

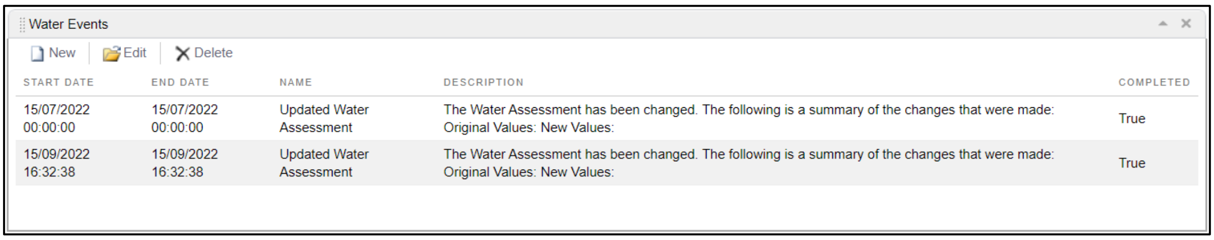


Figure 184: water events

This widget can also be used to store any additional tasks you may have that are linked to water or the risk assessment itself.

1. To add in a new event, click 'New' within the water events widget.

2. Populate the 'Task' information by completing each relevant field.

Use the free text boxes to type in the name and description and enter manually or choose a date using the calendar icon provided. The tick box can be used to mark the task as complete where applicable.

3. Click 'Save'.

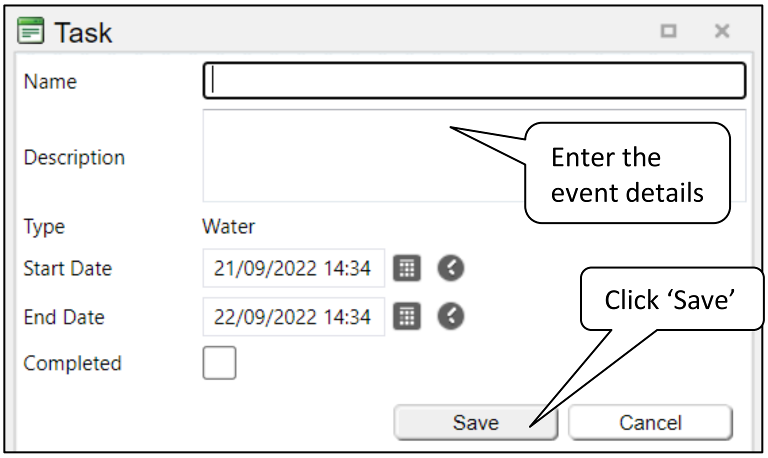


Figure 185: task window

10.12 Editing Water Events

1. To amend an existing water event, select the relevant item from the list and click 'Edit' within the water events widget.

2. The task window will appear. Make any changes as necessary and click 'Save'.

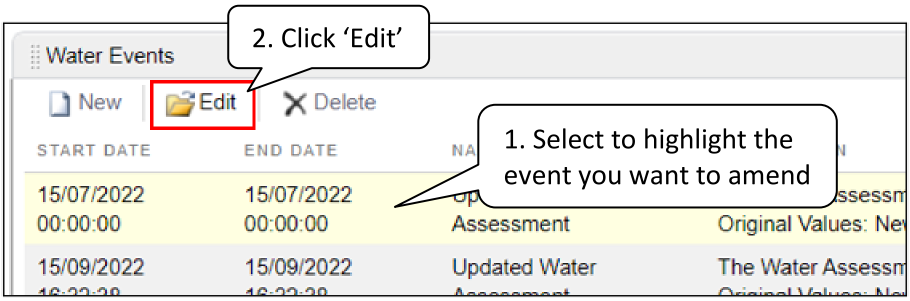
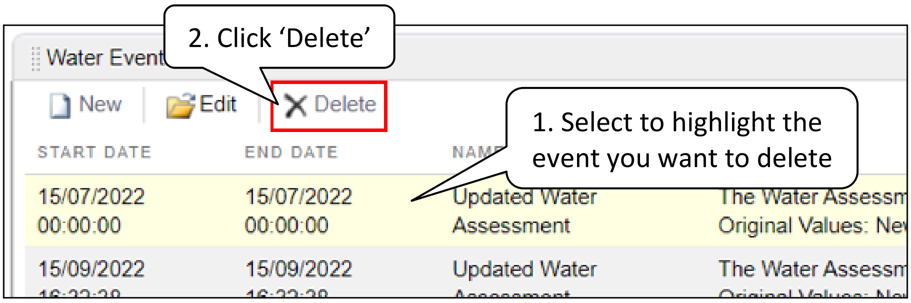


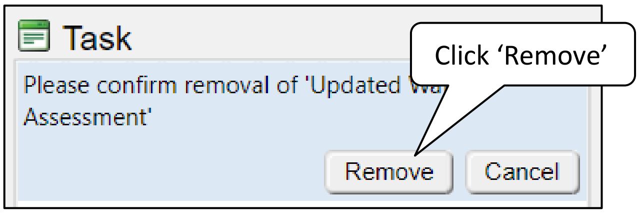
Figure 186: edit a water event

10.13 Deleting Water Events

1. Select the record of the water event you want to remove and click on 'Delete'.



2. Click 'Remove' to confirm deletion of the record.



11. Radon

Click on 'Radon' on the menu bar. The radon module is used to store radon assessments and details of associated samples and measures.

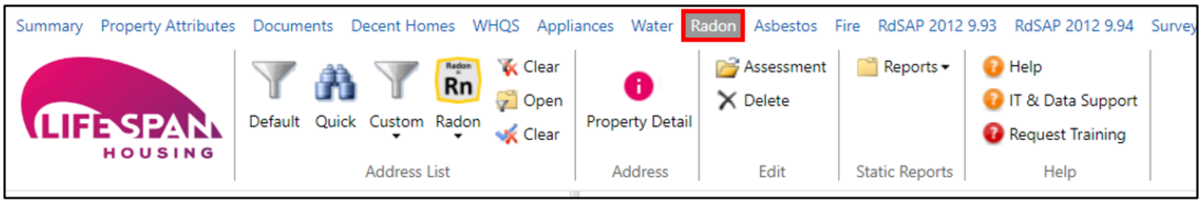


Figure 187: location of the radon module

In addition to the standard filtering options, there is an additional filter in this module which can be used to select all properties either containing or not currently containing radon data. Click on the arrow below the radon icon to select either 'Contains' or 'Does Not Contain' from the drop down list.

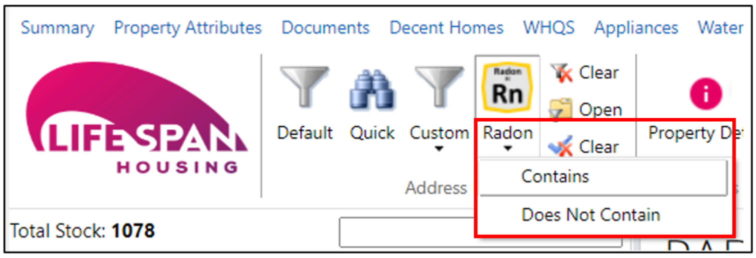


Figure 188: radon filter

The radon data is presented in separate windows on the main display. To the left of the screen, you will find background information including property details, measure priorities and measure rates. This data is populated from the summary, attributes and rates lookups – these need to be set up prior to any radon survey data being inserted to Lifespan. Please refer to section **6**

Import/Export Sheets for guidance on how to update the property and system design lookup tables via the import/export sheets.

To the right of the main screen, you will find the radon data, including windows for the assessment, samples and measures.

11.1 Adding a new Radon Assessment

1. To add a new radon assessment, click 'Assessment'.

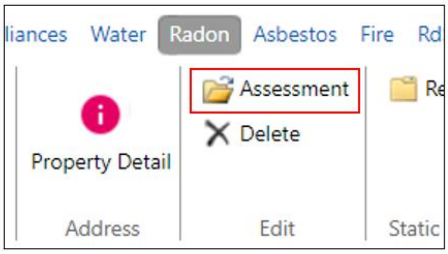


Figure 189: new radon assessment

2. Populate the 'Radon Assessment Details' by completing each relevant field.

   The majority are free text comment boxes allowing you to follow the format of your risk assessment. For the date fields, you can either type in manually or click on the calendar icon to select a date. To attach a file, click 'Choose File' and select the document you want to upload. Click 'Save' once complete.

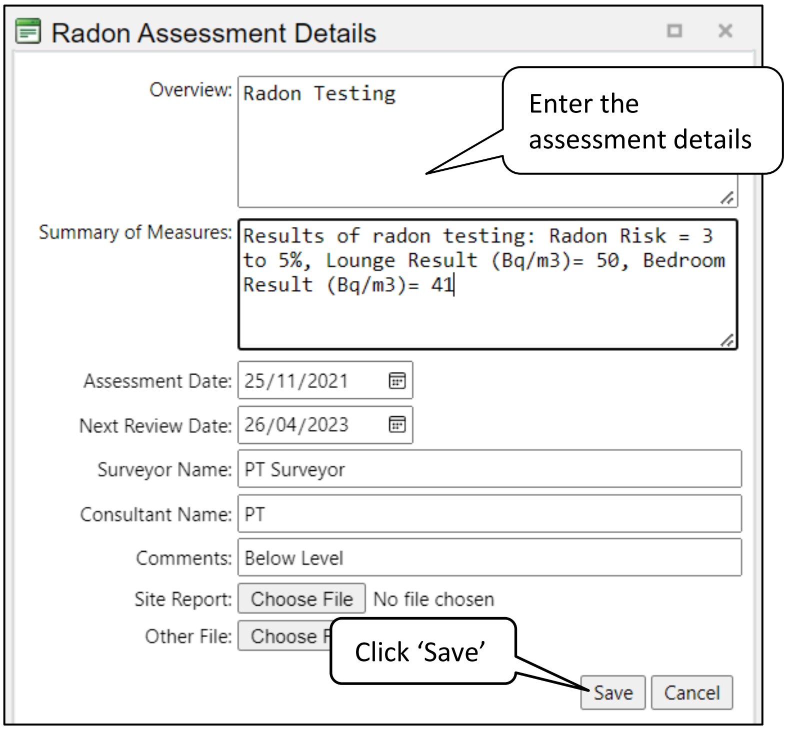
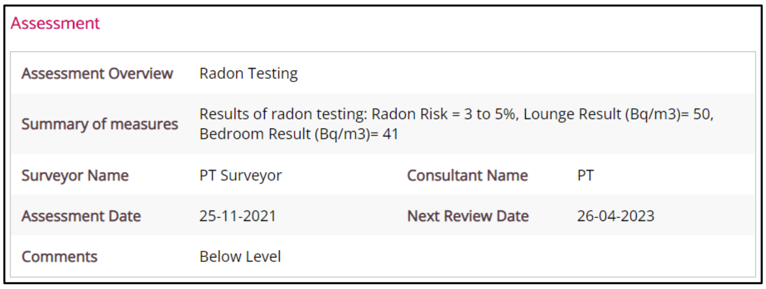


Figure 190: radon assessment details

3. When you return to the main screen, you will see the information updated in the ‘Assessment’ window.



Assessment

Assessment Overview	Radon Testing		
Summary of measures	Results of radon testing: Radon Risk = 3 to 5%, Lounge Result (Bq/m3)= 50, Bedroom Result (Bq/m3)= 41		
Surveyor Name	PT Surveyor	Consultant Name	PT
Assessment Date	25-11-2021	Next Review Date	26-04-2023
Comments	Below Level		

Figure 191: radon assessment

11.2 Editing a Radon Assessment

1. To edit an existing radon assessment, click ‘Assessment’.

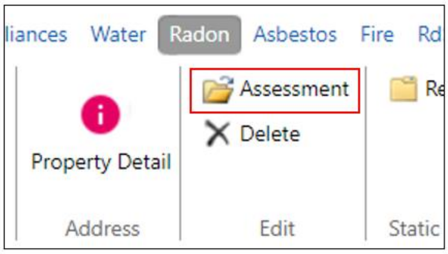


Figure 192: edit a radon assessment

2. The ‘Radon Assessment Details’ window will appear containing all existing assessment data. Make any necessary changes by overwriting the current data and click ‘Save’ to return to the main screen.

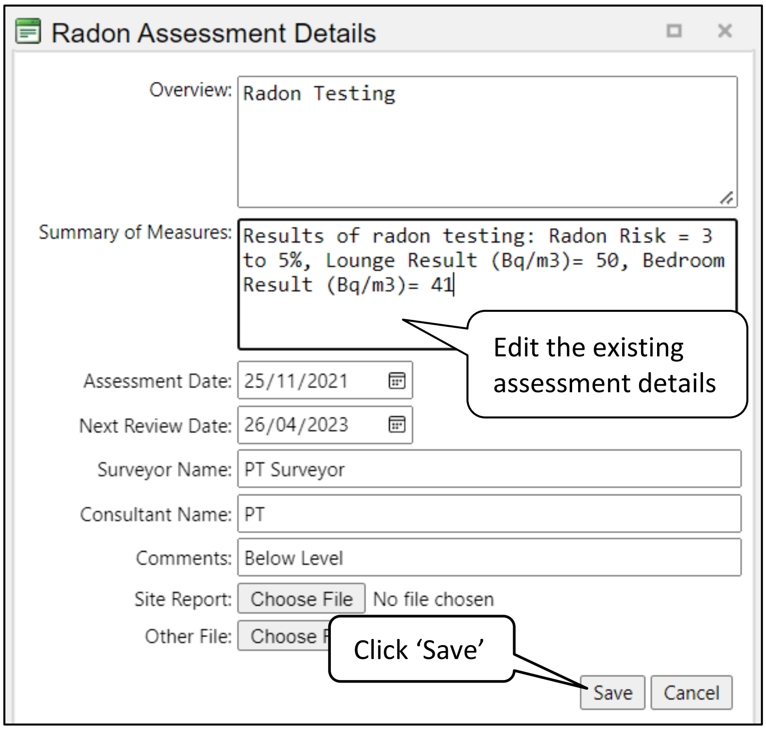


Figure 193: radon assessment details

11.3 Deleting a Radon Assessment

1. To delete an existing radon assessment, click 'Delete'.

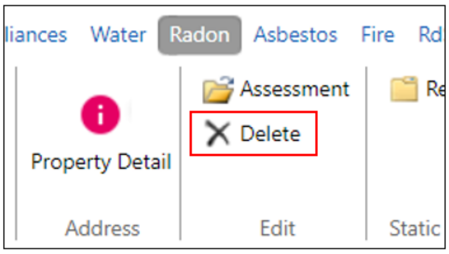


Figure 194: delete a radon assessment

2. A confirmation box will appear to ensure you want to delete the selected assessment. Click 'Cancel' to return to the main screen or 'Delete' to remove the assessment. There is an additional query in the box asking if you also want to remove all existing measures – this is ticked by default and if left will remove all associated maintenance data once the assessment is deleted. Untick the box if you want to retain the work items for the address.

NOTE Once an assessment and associated measures have been deleted there is no way of retrieving this data, you would have to re-enter the information as if it was a new assessment. With this in mind, please ensure you double check the correct property has been selected prior to deleting any data.

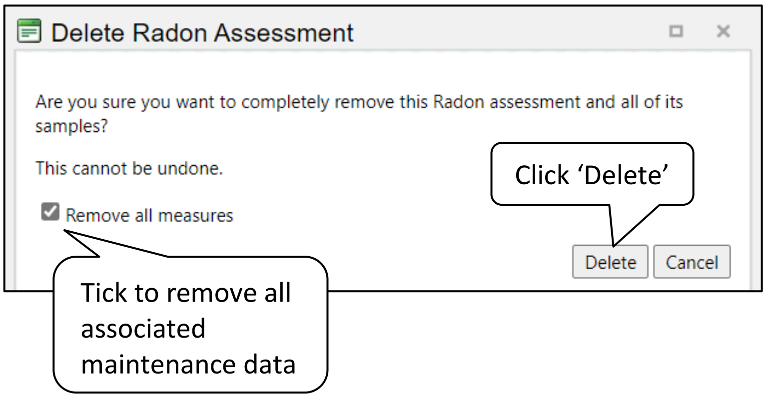


Figure 195: confirm deletion

11.4 Adding a New Radon Sample

The radon samples window displays a record for each sample taken for the selected property.

1. To create a new sample record, click 'New Sample'.

Figure 196: new sample

2. Populate the 'Radon Sample Details' by completing each relevant field.

   The majority are free text comment boxes however these are also automatic drop-down fields, meaning each time you add a new value it will be remembered on your next sample input. This facilitates easier inputting for frequently used values and maintains data consistency. For the date fields, you can either type in manually or click on the calendar icon to select a date. To attach a file, click 'Choose File' and select the document you want to upload.

3. Click 'Save'.

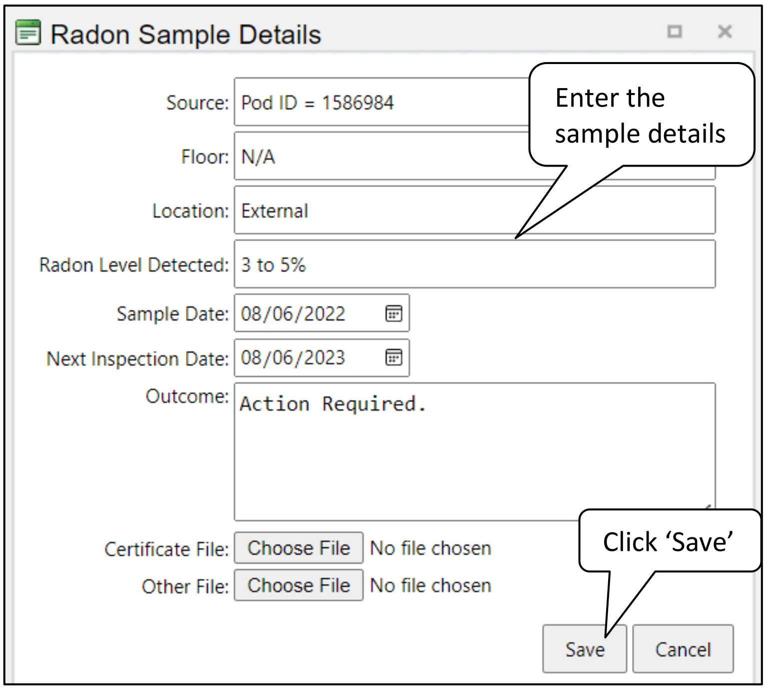


Figure 197: radon sample details

11.5 Editing a Radon Sample

1. To edit an existing radon sample, click the relevant 'Sample ID' from the list.

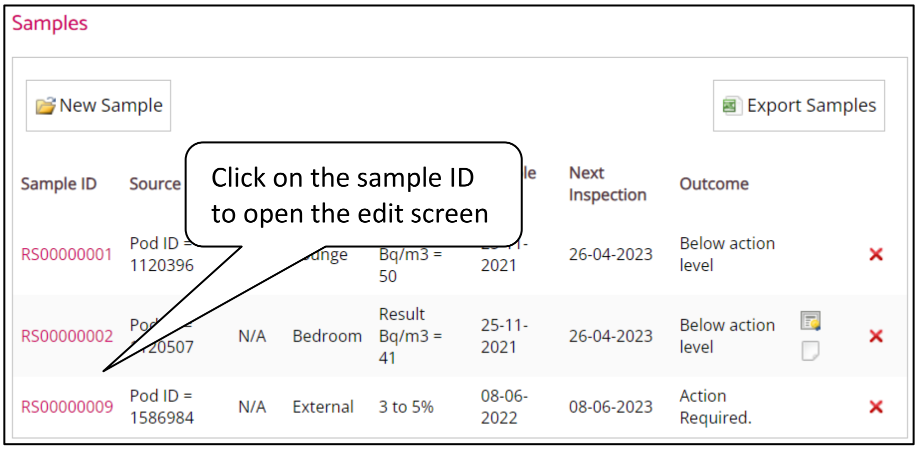


Figure 198: edit a radon sample

2. This will bring up the completed 'Radon Sample Details' window. Make any changes required and click 'Save'.

11.6 Deleting a Radon Sample

1. To delete an existing radon sample, locate the corresponding sample from the list and click on the 'X' to the right of the record.

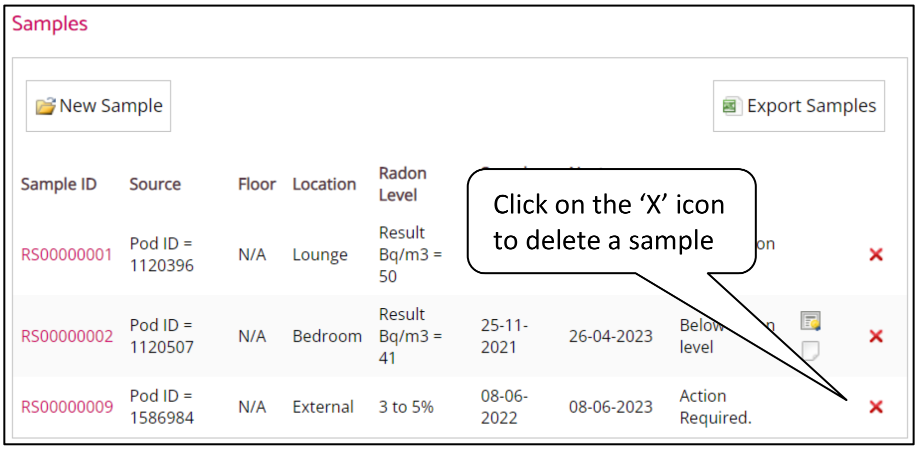


Figure 199: samples

2. A confirmation window will appear before any data is removed. At this point you can click 'Cancel' to return to the main screen or click 'Delete' to remove the selected sample record. Also on this screen is a tick box option which should be used if you want to delete any attachments associated with the sample.

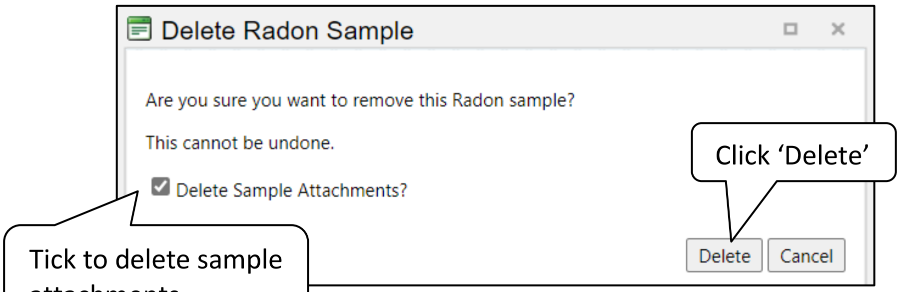


Figure 200: delete radon sample

NOTE Once a sample is deleted the data cannot be restored, you would have to re-enter the sample details under a new sample ID.
Sample IDs are unique, once a sample is created an ID is assigned and not used in the account again, even if the sample is later removed.

11.7 Adding a New Radon Measure

The radon measures window displays a record for each measure for the selected property. By adding in a measure, you are creating a new work item against the address. As well as the measure being displayed in the radon module, the measure will be added as a planned maintenance item within the 'Property Attributes' module. Please refer to section **5. Property Attributes and Planned Maintenance** of the Lifespan Web manual for further guidance on how to view, edit and mark works as complete.

NOTE Priorities and rates need to be set up in your account before any Radon Measures can be added to a property. These are managed via your system administrator and once added are displayed in the 'Measure Priorities' and 'Measure Rates' windows within the radon module.

1. To add a new measure, click ‘New Measure’ within the ‘Measures’ window on the main screen.

Figure 201: new measure

2. Populate the ‘Radon Measures Details’ by completing each relevant field.

   The main input method for this window is by selecting from drop-down lists with pre-set values. The free text comment boxes are also automatic drop-down fields, meaning each time you add a new value it will be remembered on your next sample input. This facilitates easier inputting for frequently used values and maintains data consistency.

3. Click ‘Save’.

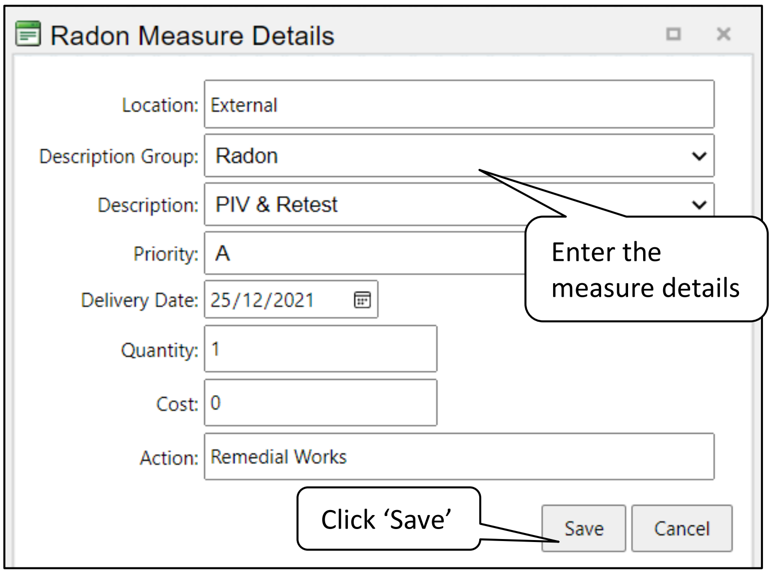


Figure 202: radon measure details

11.8 Editing a Radon Measure

1. To amend an existing radon measure, click the relevant ‘Measure ID’ from the list.

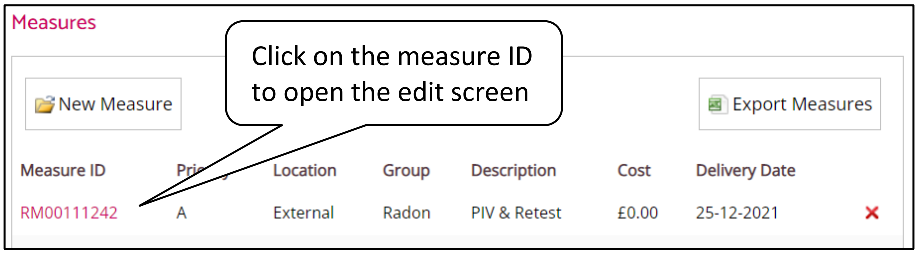


Figure 203: edit a radon measure

2. The radon measures window will appear. Make any changes as necessary and click 'Save'.

11.9 Deleting a Radon Measure

1. To delete an existing radon measure, locate the corresponding sample from the list and click on the 'X' to the right of the record.

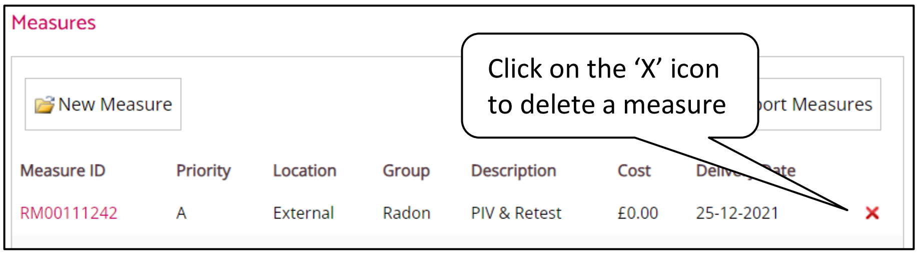


Figure 204: measures

2. A confirmation window will appear before any data is removed. At this point you can click 'Cancel' to return to the main screen or click 'Delete' to remove the selected measure record. Also on this screen is a tick box option which should be used if you want to delete any attachments associated with the sample.

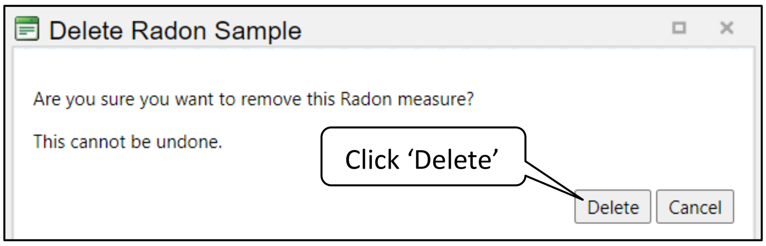


Figure 205: delete radon sample

NOTE Once a measure is deleted the data cannot be restored, you would have to re-enter the measure details under a new measure ID.
Measure IDs are unique, once a measure is created an ID is assigned and not used in the account again, even if the measure is later removed.

11.10 Radon Attachments

Radon certificates and other files can be attached either alongside the assessment or against specific samples. In each instance there is a ‘choose file’ button against the title of ‘Site Report’ or ‘Other File’ enabling you to select and upload your attachments.

1. Click ‘Assessment’ to access the radon assessment details screen or ‘New Sample’ to create a new sample, then click ‘Choose File’ to select the file you want to upload against the relevant section.

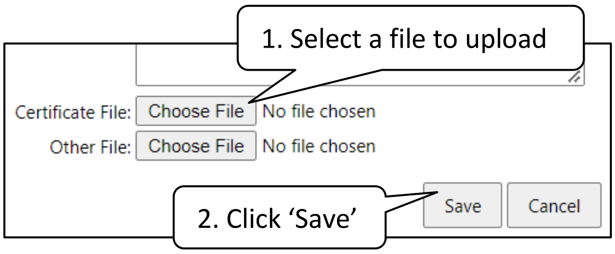


Figure 206: attach a file

NOTE You can add a file to an existing sample by clicking on the specific sample ID under ‘Samples’ to access the applicable edit screen.

2. Once an attachment has been uploaded, you will see a small icon within the section it was added against.

   In the assessment window you will see the attachments listed as either ‘Site Report’ or ‘Other’.

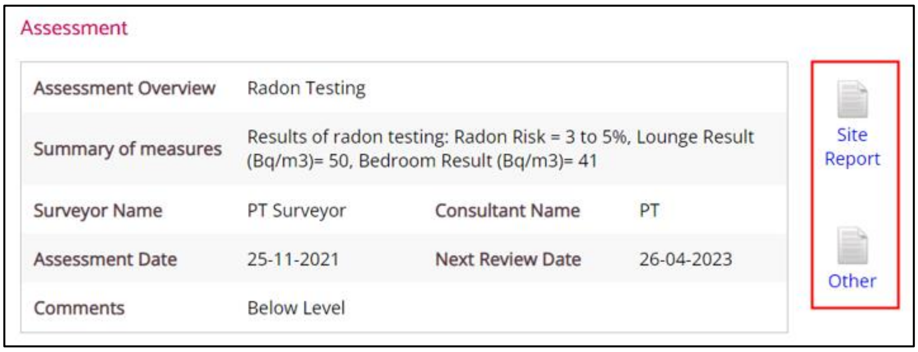


Figure 207: assessment attachments

   In the samples window you will see a ‘Certificate’ and/or ‘Other’ icon, hover the icon to display the description.


Samples

New Sample | Export Samples

Sample ID	Source	Floor	Location	Radon Level	Sample Date	Next Inspection	Outcome
RS00000001	Pod ID = 1120396	N/A	Lounge	Result Bq/m3 = 50	25-11-2021	26-04-2023	Below action level
RS00000002	Pod ID = 1120507	N/A	Bedroom	Result Bq/m3 = 41	25-11-2021	26-04-2023	Below action level
RS00000009	Pod ID = 1586984	N/A	External	3 to 5%	08-06-2022	08-06-2023	Action Required.

Figure 208: samples

3. Click on the icon to generate a download of the attachment.

NOTE Any attachments uploaded will also display in the documents module of Lifespan Housing. From here you will be able to upload further attachments, as well as edit or remove existing files.

For guidance on how to add additional attachments or edit/ delete existing radon attachments, please refer to section **7. Documents** of the Lifespan Housing Web manual. You can refer to **7.2 Linking Documents to Specific Modules** within the same manual for guidance on how to link attachments to the radon module).

12. Asbestos Risk Assessments

Click on 'Asbestos' on the menu bar. This screen holds information on asbestos risks in widget form. For more information on how to use widgets, please refer to section **4. The Summary Screen.**

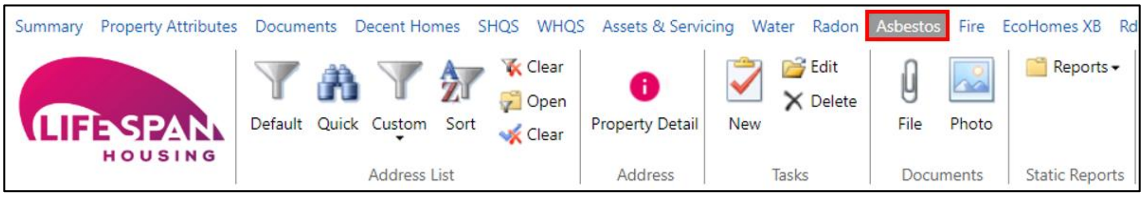


Figure 209: location of the asbestos module

12.1 Adding Asbestos Risk Assessments

1. From the asbestos tab, click 'New' in the 'Risk Assessments' widget.

Figure 210: *creating a new assessment*

2. Fill in the details, working through each tab. The majority of fields are pick list values, dates can be entered manually or use the calendar pop up to select a date.

   The panel at the top of the screen will update as you populate the information, applying the relevant risk scores from the data inputted.

3. Click 'Save' to finish.

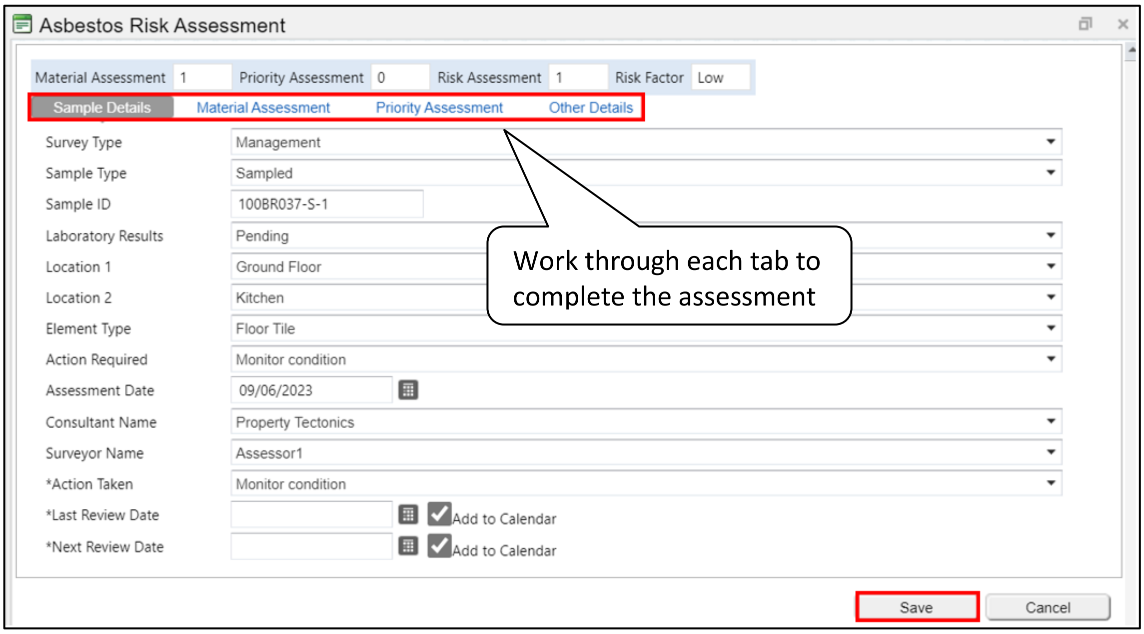


Figure 211: *asbestos risk assessment*

12.2 Editing Asbestos Risk Assessments

1. Choose a risk assessment from the 'Risk Assessments' widget and click 'Edit'.

Figure 212: *editing a risk assessment*

2. Make any changes and click 'Save'.

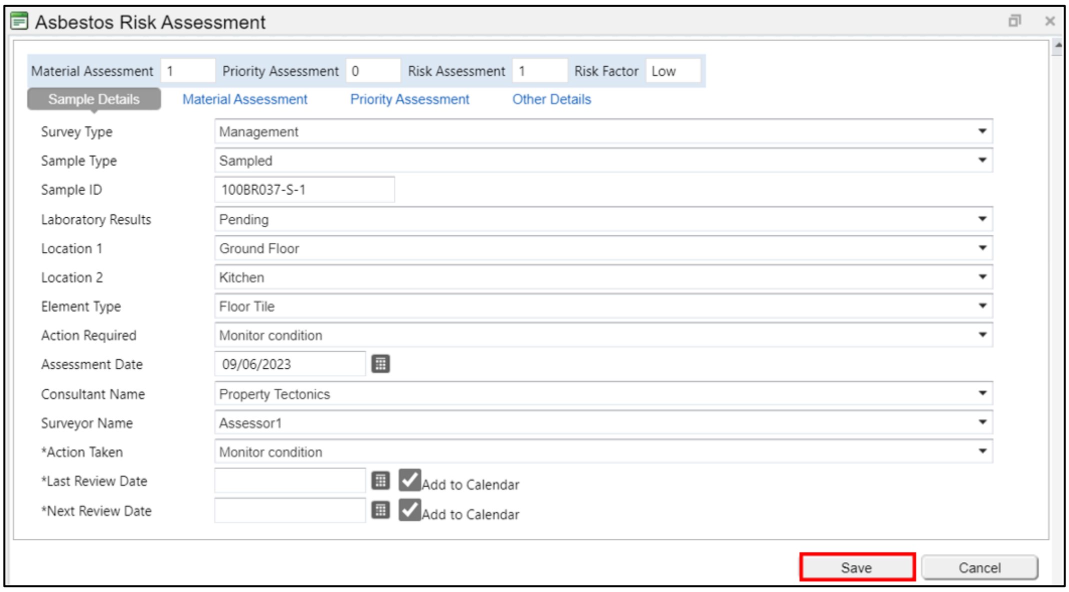


Figure 213: *edit an existing risk assessment*

12.3 Deleting Asbestos Risk Assessments

1. Select a risk assessment and click 'Delete'.

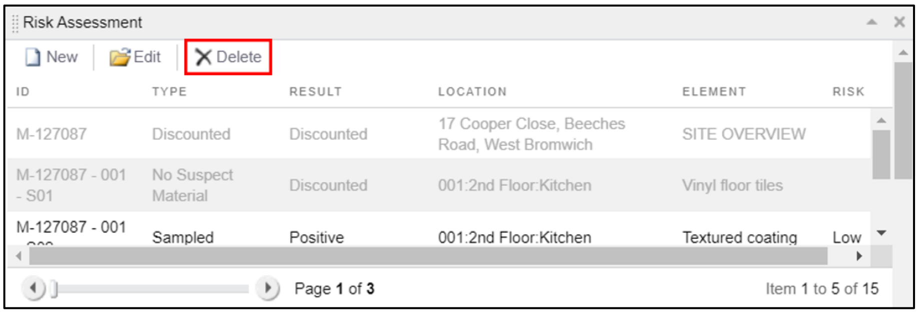


Figure 214: *deleting a risk assessment*

2. Click 'Remove' to complete.

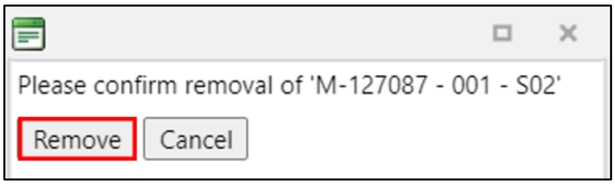


Figure 215: confirm the removal

13. Fire Risk Assessments

Click on 'Fire' on the menu bar. The fire risk management screen is displayed over separate windows, each containing a different dataset. From this area you have visibility of photographs, general fire information attributes, reports and risk management information.

Figure 216: location of the fire tab

Property

Under the 'Property' heading you will see a window containing photographs for the selected address, this displays only photographs relevant to the fire module.

NOTE For photographs to be displayed in this window, you need to ensure they are linked to the fire module, i.e. have the attachment type 'FRA'.

1. Review the photographs using the scroll bar underneath the smaller images, click to select one of these and update the main photograph above.

2. Tap on the larger image to expand to full screen. You can also right click to save or copy the image.

Figure 217: property photographs

General Information

The 'General Information' section displays all background information on the property, relevant to the fire safety. This is linked with the property attributes for the selected address.

NOTE For data to be displayed in this section, your account will need to be set up with an 'FRA Background data' attribute group. All relevant property attributes can then be assigned to the group and will be shown in the FRA module under this heading if present for the selected address.

General Information

Number of Storeys	4
Communal Area Type	Yes - Has Internal Communal Area
FRA Inspection Frequency	1-yearly
Property Designation	Low
Building Height	11m
Cladding Present	No
Evacuation Policy	Stay Put
Fire Fighting Lift Present	No
Sprinklers Installed	No
Tenant balconies, or terraces present	No

Figure 218: general information

Please see section **3.3.2 Attribute Groups** for guidance on attribute groupings and section **6.7.2 Analysis Groups** for guidance on how to set up a new group via the import/export sheets.

Reports

If the selected property has a fire risk assessment, you will be able to download a copy of the latest report in this section.

1. Click on the 'Latest Fire Risk Assessment' description to generate the PDF download.

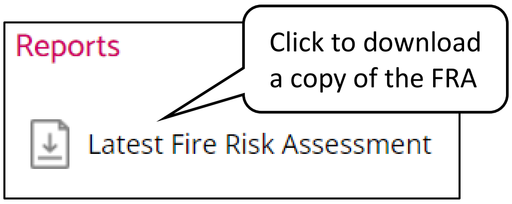


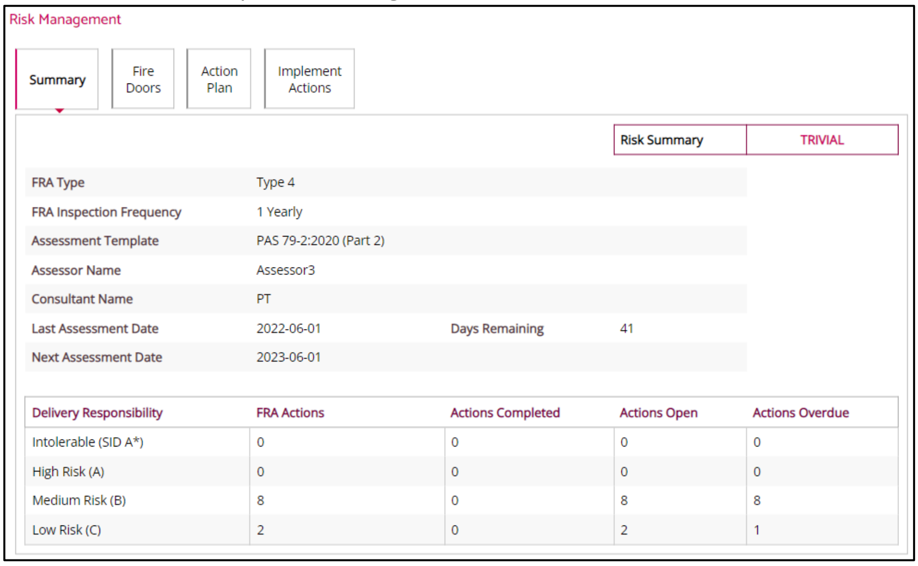
Figure 219: FRA report

Risk Management

There are multiple tabs within the 'Risk Management' section, all looking at different aspects of the fire data. These tabs are listed below.

- Summary - Providing an overview of the fire assessment details, number of days remaining until the next assessment is due and a breakdown of the FRA actions.

  The information here is pulled through from the current fire risk assessment.



FRA Type	Type 4		
FRA Inspection Frequency	1 Yearly		
Assessment Template	PAS 79-2:2020 (Part 2)		
Assessor Name	Assessor3		
Consultant Name	PT		
Last Assessment Date	2022-06-01	Days Remaining	41
Next Assessment Date	2023-06-01		

Delivery Responsibility	FRA Actions	Actions Completed	Actions Open	Actions Overdue
Intolerable (SID A*)	0	0	0	0
High Risk (A)	0	0	0	0
Medium Risk (B)	8	0	8	8
Low Risk (C)	2	0	2	1

Figure 220: risk management: summary

- Fire Doors – Displaying all existing fire door assessments including the action details, current risk and target dates. An 'Export' function is present to enable you to download the actions into an excel format.

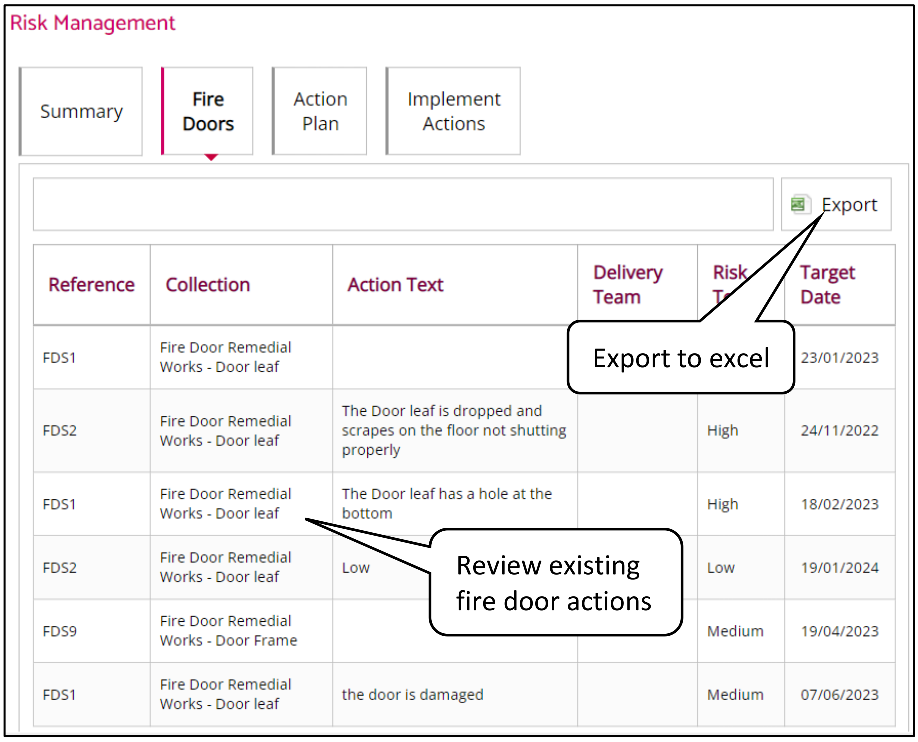


Figure 221: risk management: fire doors

For guidance on how to add a new or edit existing fire door assessments, please refer to section **13.5 Fire Doors**.

- Action Plan – Displaying all existing action plan items taken from the fire risk assessment. Details include the delivery team, category, action description, risk category, target date and status for each action listed. These can also be filtered on risk level or completion status by using the ‘Show:’ bar tick boxes above the actions. An ‘Export’ function is present to enable you to download the actions into an excel format.

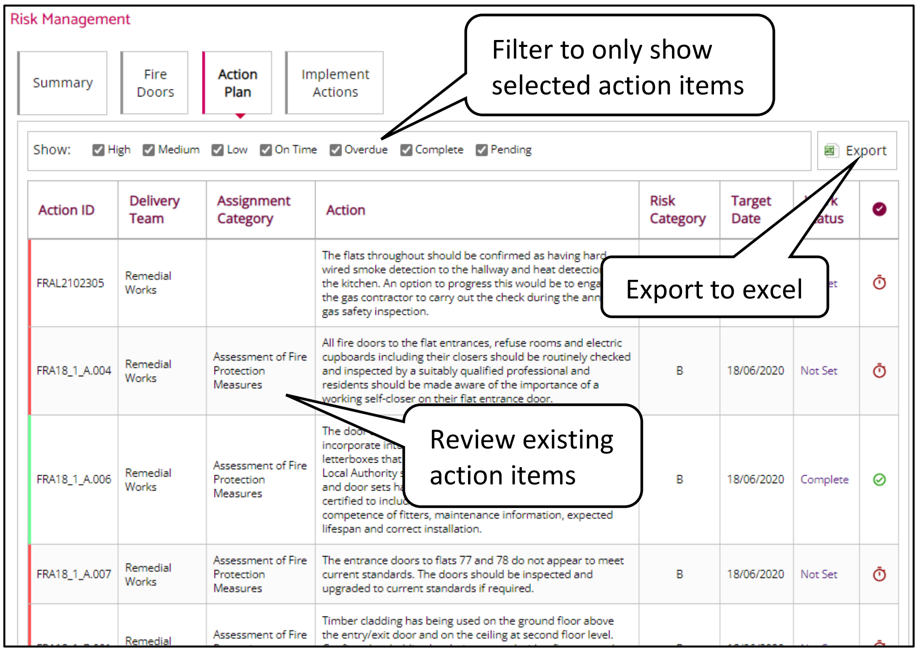


Figure 222: risk management: action plan

- Implement Actions – To review/assign budget and actual costs to existing action items. Action plan items are listed alongside the plan, execute and complete columns, presenting costs once inputted. Below is a cost breakdown showing the budget, committed and spent costs for the selected property.
  The 'Action Book' can be exported here, then amended and re-imported to update the details displayed in Lifespan.

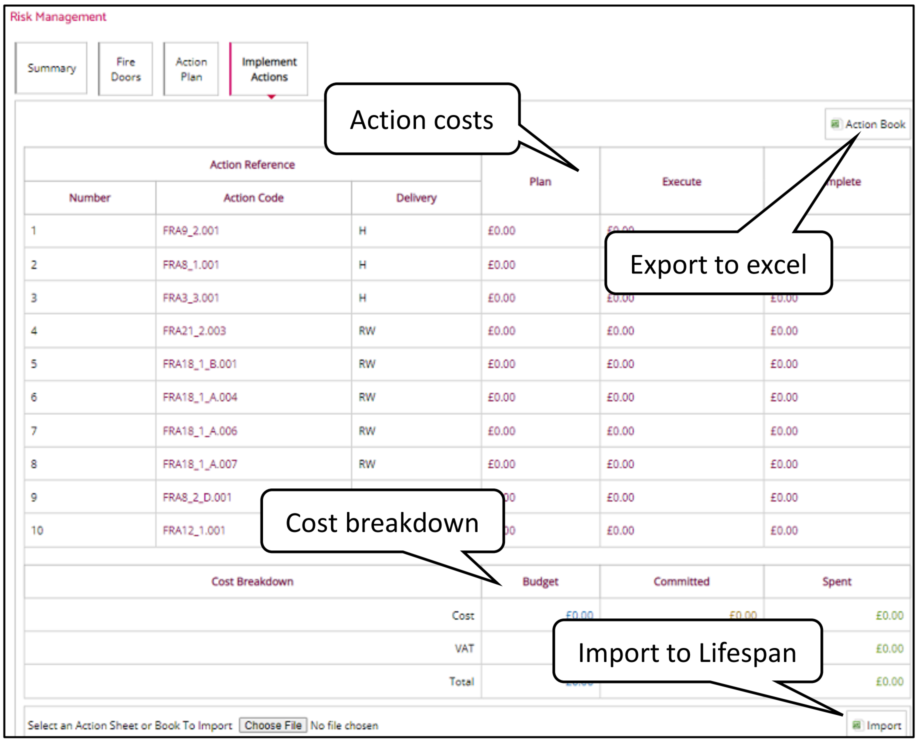


Figure 223: risk management: implement actions

13.1 Adding or Editing Fire Risk Assessments

Please be aware that there are multiple templates within Lifespan for the collection of fire assessment data. Some of the older assessments may be using the PAS 79:2012 template, while the latest assessments should be collected using the PAS 79:2020 template (part 1 for commercial buildings and part 2 for residential).

1. In the 'Fire' tab, click on 'New/Edit'.

   If there is no prior data, this will bring up a blank assessment using the latest template for you to populate. If you have selected a property that currently has FRA data stored against it, you will be viewing the most recent assessment records in the same template version it was completed in.

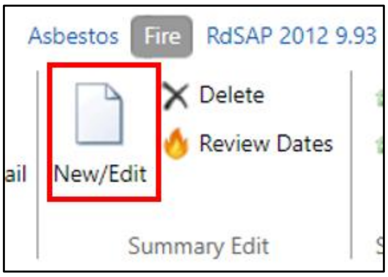


Figure 224: location of the new/edit button

2. Select the applicable template from the list in the top left of the screen.

   If there is existing data using the old template, you will need to update to the correct template by selecting from the list.

NOTE Any relevant data from the old template will be transferred to the new version when you switch the template. i.e., if the question is the same in both versions you will not lose the information when you update the template.

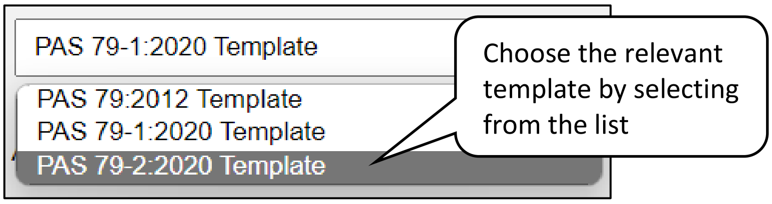


Figure 225: assessment template

The FRA shows the different sections of the report in list format on the left of the screen. There are separate items under each heading, which when you click into them will open a set of questions to complete. Once you have completed the fields on the current screen, you can either press 'next' to move on or click on a section heading from the list to display the associated questions.

Throughout the assessment, questions are answered via free-text fields or pick list selections. The only exception to this being the date fields in the initial 'Details' section.

- For date values, click into the answer box to type in a date manually or click on the icon to the right to open the calendar and select one.

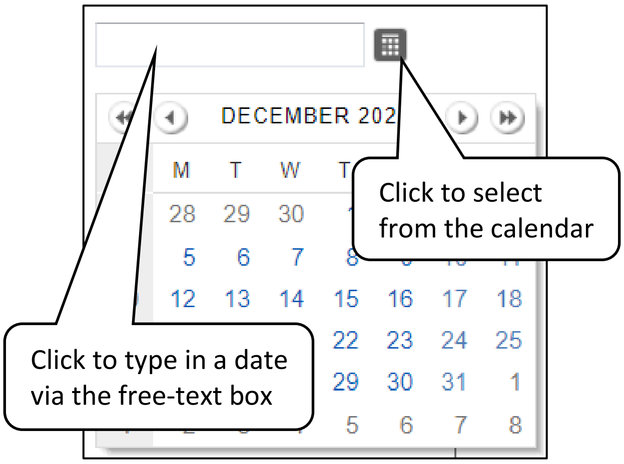


Figure 226: date values

- For free-text fields, click anywhere in the box and type in the relevant value.

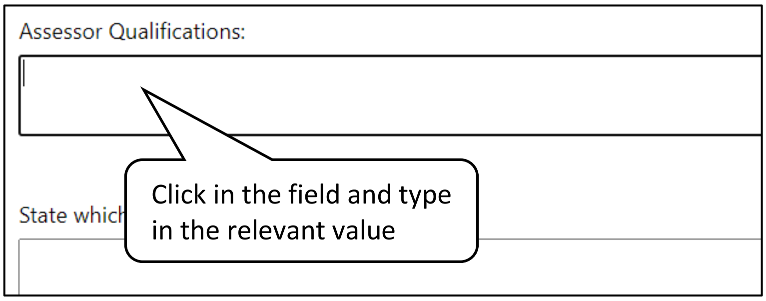


Figure 227: free-text values

- For pick list values, click into the field and select one of the pre-set answers.

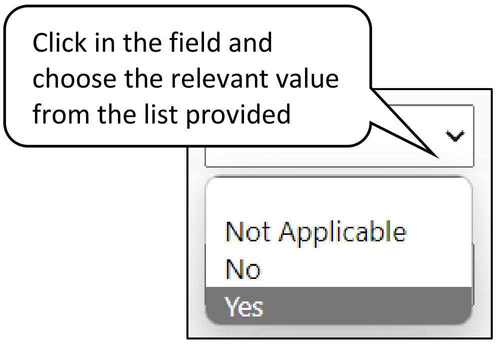


Figure 228: pick list values

3. Work through the assessment populating each field as required. Once completed, the fire risk level will be updated at the bottom of the screen.

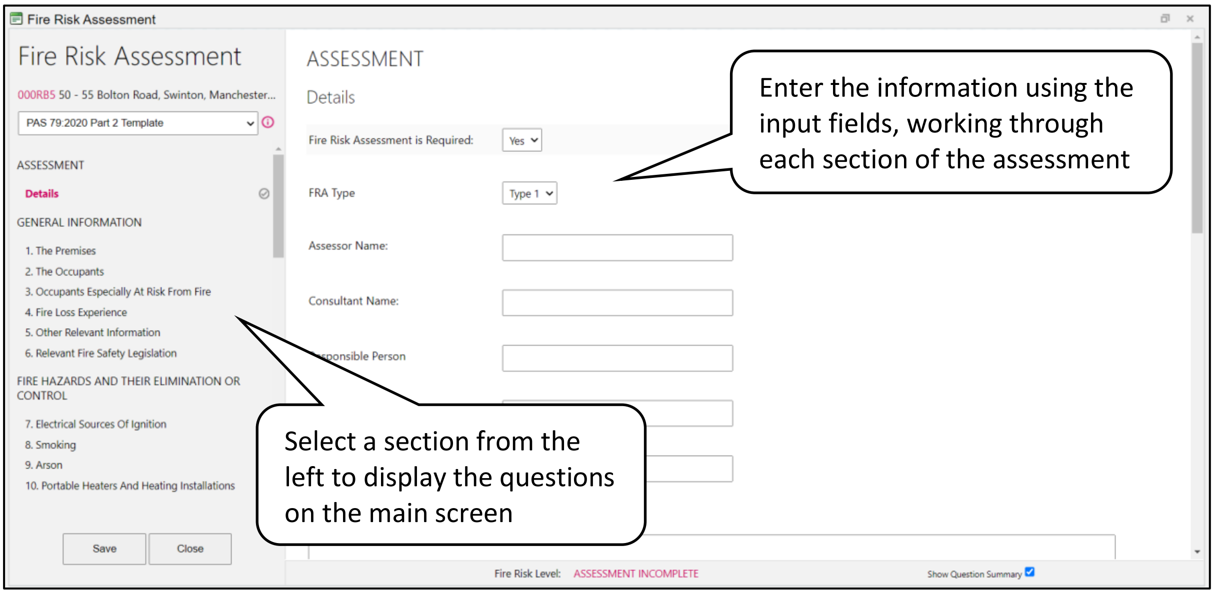


Figure 229: fire risk assessment

4. Click 'Save' once completed.

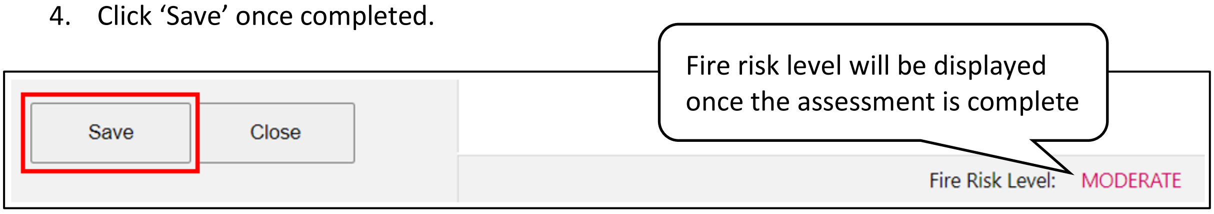


Figure 230: save the assessment

13.2 Additional Comments/ Action Plan

For some questions you may need to include a comment in addition to the answer being inputted. To the right of each relevant answer field you will see a pencil icon which is where any comments, action plan items and photographs are added to the assessment.

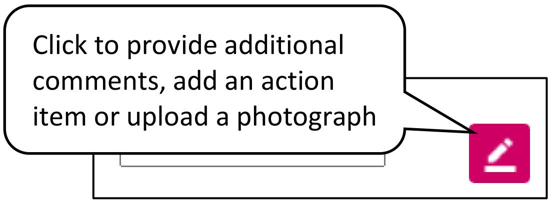


Figure 231: additional comments

1. Click on the pencil icon. A new window will open, giving you the option to add a new comment.

2. Use the free-text field to add in your comments. If the comment needs to be marked as an action plan item, use the tick box below to show it requires action.

   You can add multiple comments to a question. Click 'Add Another Comment' to display another free-text box.

Figure 232: ***new comments***

3. Any comments you have indicated as requiring an action within the assessment will appear in the action plan section. Select 'Actions' from the list to display the information on the main screen.

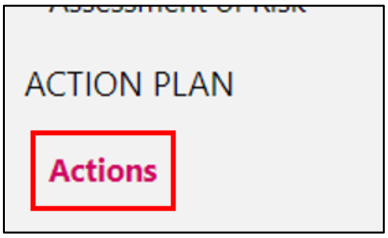


Figure 233: actions

4. Use the input fields to set the priority, quantity, cost and category for each action. Once these are updated and saved, a new maintenance item will be created and displayed in the property attributes module of Lifespan.

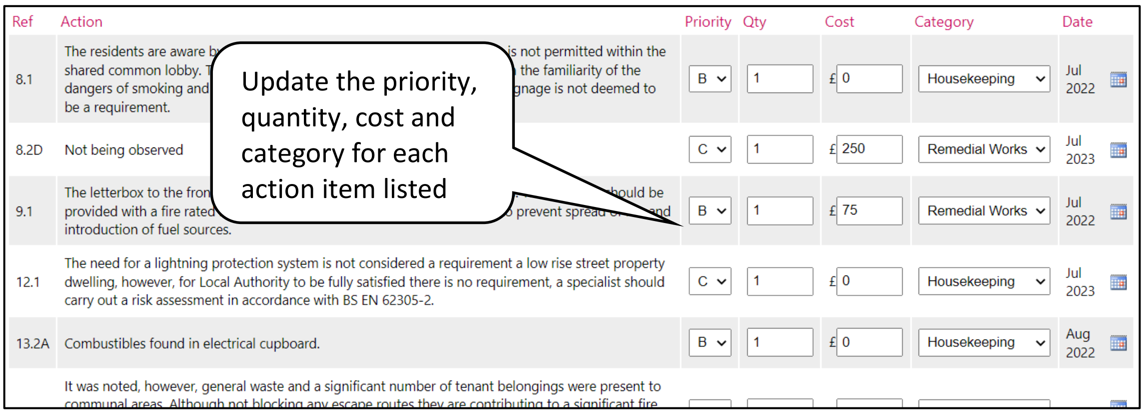


Figure 234: action plan items

NOTE The 'Date' field displayed will automatically update dependent on the 'Priority' selected. This uses the following timescales by default however these can be modified per customer account if required.

- A (High Priority) = 1 Month from date of assessment
- B (Medium Priority) = 3 Months from date of assessment

- C (Low Priority) = 1 Year from date of assessment

There may be instances where you need to remove a comment. To do this, you will need to return to the question where it was added and remove each comment individually.

5. Click the pencil icon to open the comments section. To the right of each text box you will see a bin icon, click this to remove the comment. This will clear the box allowing you to add an alternative comment or leave it blank and click 'Close' to return to the assessment.

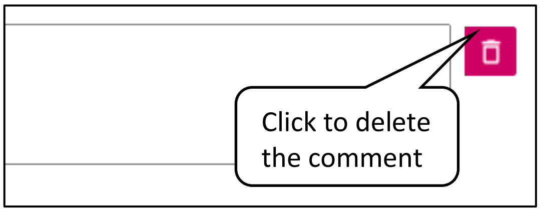


Figure 235: *delete button*

NOTE If the comment you are deleting formed part of the action plan, this will also be deleted so it will no longer appear in your 'Actions' section of the assessment. The action will also be deleted automatically from your planned maintenance data in the 'Property Attributes' module of Lifespan once the assessment has been saved.

13.3 Attaching a Photograph to an Assessment

There is the option to attach one or multiple photographs throughout the assessment, via the comments section for each applicable question.

1. Click on the pencil icon of the question you want to attach the photograph(s) to access the comments section.

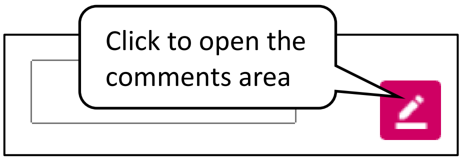


Figure 236: comments icon

2. Click on the camera icon underneath the comments and action item tick box.

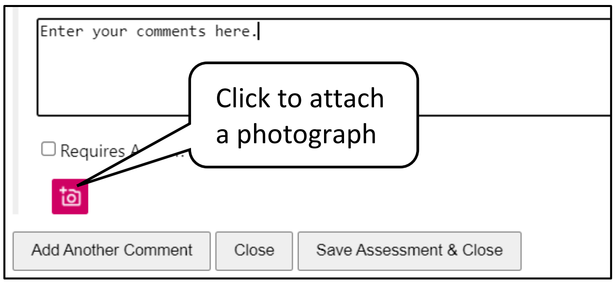


Figure 237: camera icon

3. Choose either 'Upload a new photograph' to add a new image or 'Select an existing photograph attachment' to attach an existing image to the assessment.

- Selecting 'Upload a new photograph' will open a browser menu, so you can select an image from your computer.

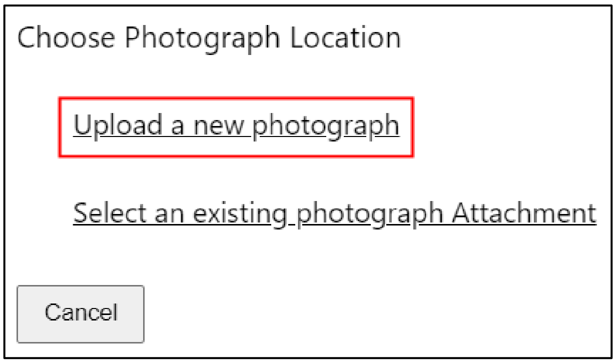


Figure 238: upload a new photograph

 - Click 'Select' to choose a photograph from your computer, then click 'Add File'. Once selected you will be given the option to attach additional files if applicable.

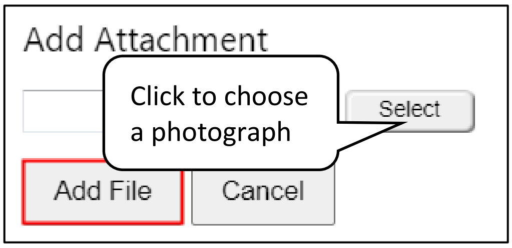


Figure 239: add attachment

- Choosing to 'Select an existing photograph Attachment' will display all the images linked to the selected property.

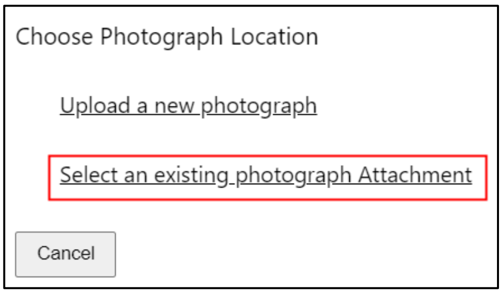


Figure 240: select an existing photograph attachment

 - Highlight the image you want to include by clicking on it, then press 'Add Selected'.

Figure 241: select existing image

13.4 Deleting Fire Risk Assessments

1. Select an assessment and click on 'Delete' on the menu bar.

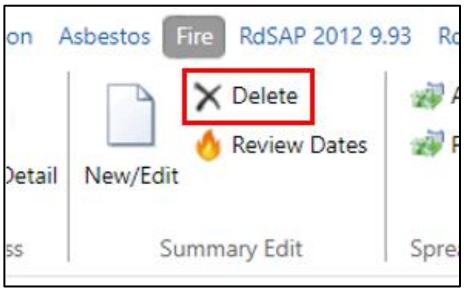


Figure 242*: delete button*

2. Use the tick box if you also want to remove any associated action items and then click 'Remove' to confirm you want to delete the FRA.

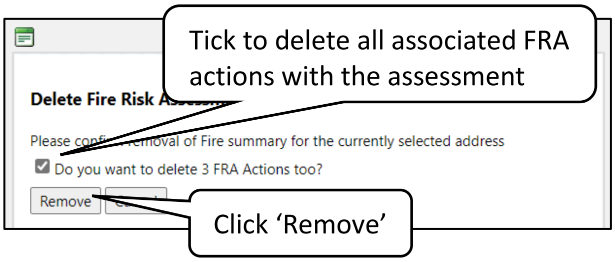


Figure 243*: confirm removal*

13.5 Fire Doors

In addition to the fire risk assessment, an assessment is required for each fire door with the premises to identify the door type, manufacturer and model, fire rating and evaluate the condition of each element.

1. To add a new or edit an existing fire door assessment, click on 'Edit' under the 'Fire Door' section within the fire module.

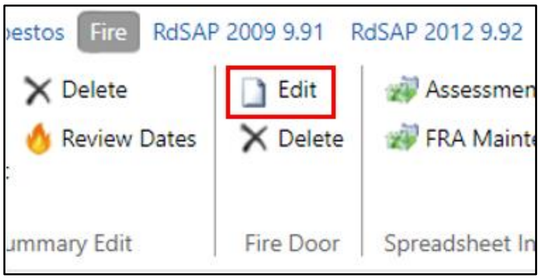


Figure 244: fire door edit button

All existing assessments will be listed on the left of the screen.

2. To edit an existing assessment, select it from the list to display the details and make the changes as required. Alternatively, click 'New Fire Door' to add a new assessment.

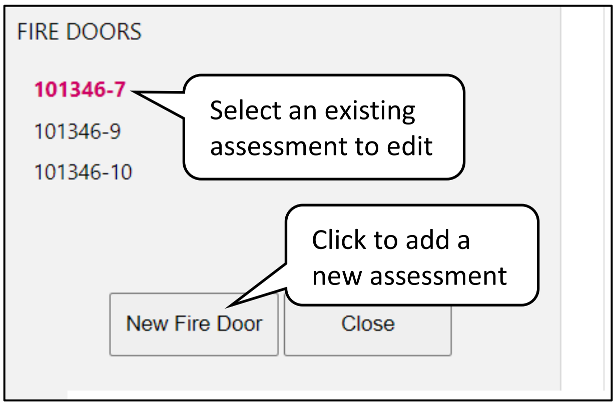


Figure 245: fire doors

3. Once you click 'New Fire Door' a new record will appear on your fire doors list and the edit screen will open on the right allowing you to input the details.

- Date fields – manually type in the date or click on the calendar icon to choose the date.
- Free-text fields – type in the manual entry.
- Pick-list fields – click in the field to open the drop-down list. Choose the value to populate.
- Tick-box fields – tick to answer yes to a question or leave unticked to answer no.

The assessment is split over 4 sections.

- General – to provide the initial assessment details.
- Door Leaf – to provide condition information on all aspects of the door leaf.
- Door frame – to provide condition details on all aspects of the door frame.
- Mongery – to provide condition details on all aspects of the door mongery.

4. Work through the assessment input data into each field provided. Under the 'General' section, the 'Fire Door Name' has been populated by default with a unique ID however this can be manually updated if an alternative format is required.

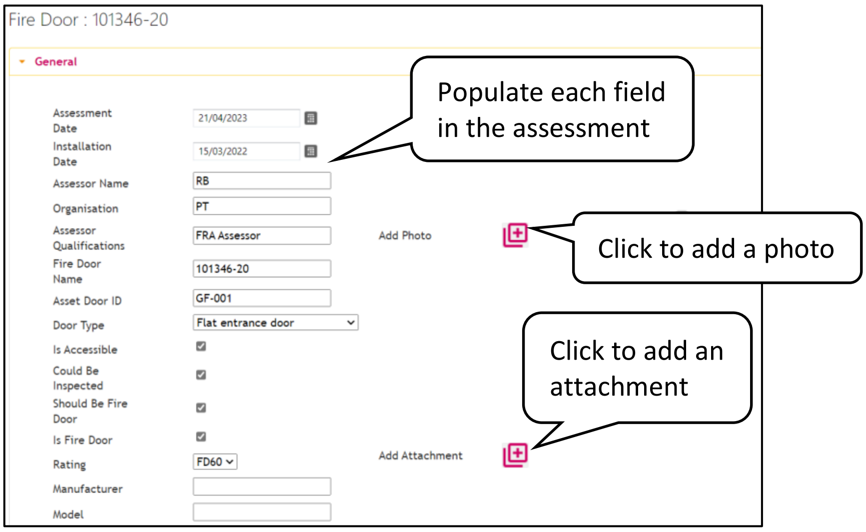


Figure 246: fire door general details

5. To add a photograph or attachment, click on the corresponding '+' icon. This will open a new window and give you the option to either upload a new attachment or select an existing attachment. For 'Add Attachment' you also have the option to add a URL.

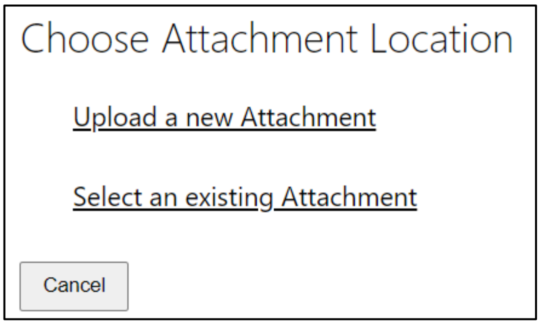


Figure 247: choose attachment location

6. To upload a new attachment, choose this option and select the relevant file on your computer before clicking 'Add File' to attach.

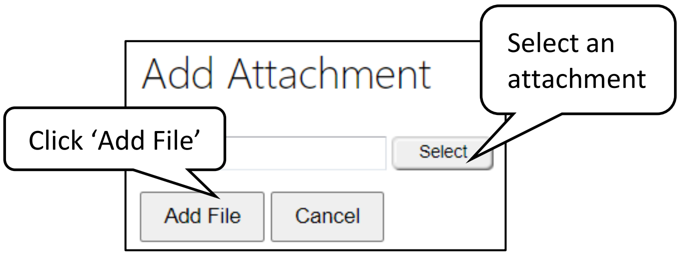


Figure 248: add attachment

7. To select an existing attachment, choose this option and click on one or multiple attachments listed. Click 'Add Selected' to confirm your choice and attach the files.

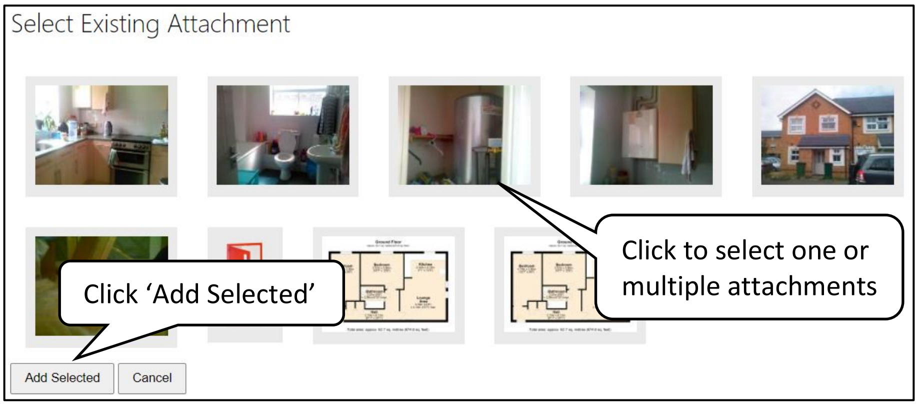


Figure 249: select existing attachment

8. To add a URL, select this option and type or paste in the details. Click 'Add URL' to save.

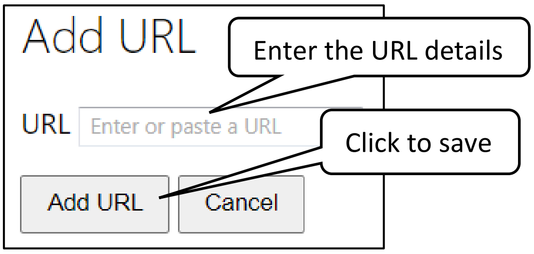


Figure 250: add URL

9. After an attachment or URL has been added, you will be directed back to your assessment and the attachment records and URL details will be visible on the screen. If multiple attachments have been added, you can scroll through to view in a larger format.

   To delete an attachment or URL, click on the small bin icon to the left of the item.

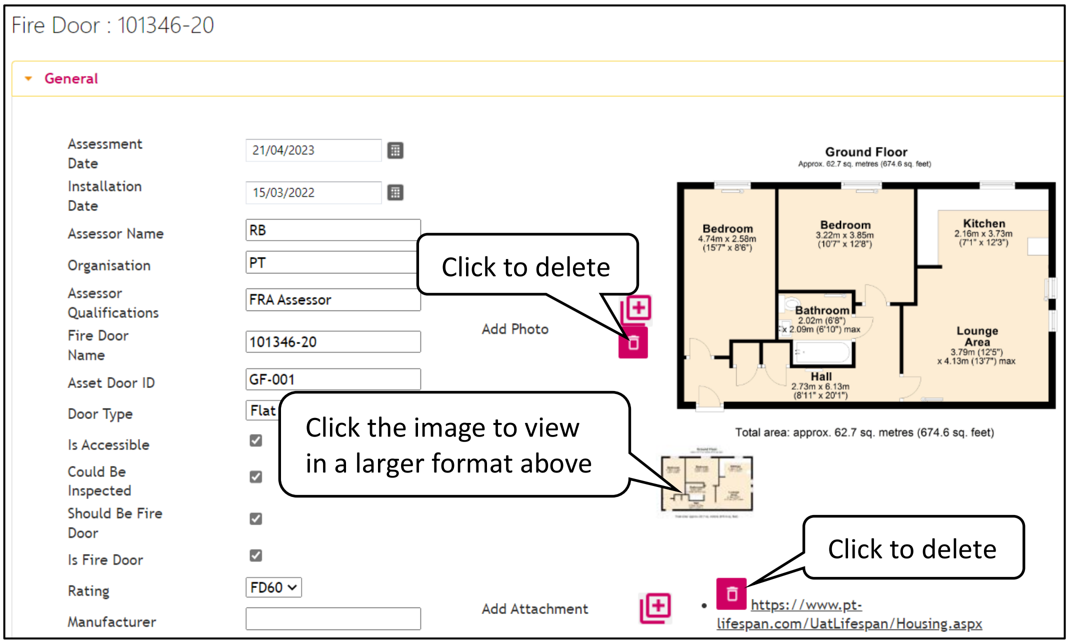


Figure 251: updated fire door assessment

10. For the remaining sections of the assessment, the defects are listed under the relevant heading.

    To update, use the tick-box to confirm the defect is present and if so, use the drop-down list to select the risk rating.

    The button to the right of each defect allows you to add a comment or attachment.

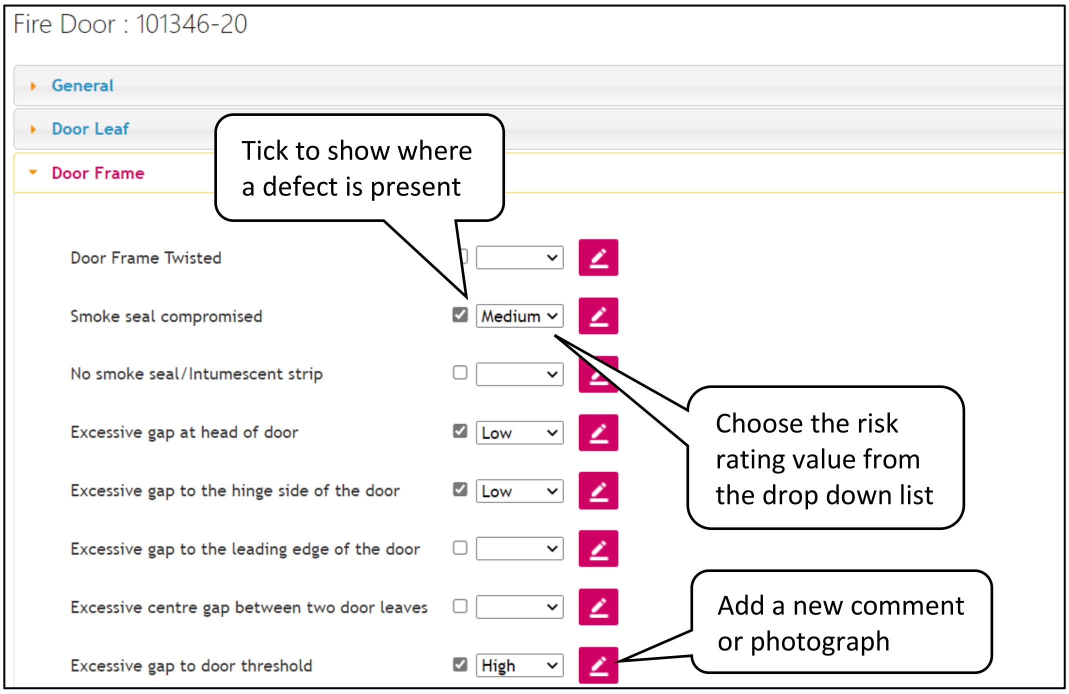


Figure 252: door frame details

11. To add a comment or photograph to a defect, click on the button to the right of the description. All comments are free-text fields, type in your comment as required.

    Click the camera icon below the comment field to add a photo and follow the same steps from earlier in the assessment to either upload a new or select an existing attachment. Click 'Done' to save and return to the assessment.

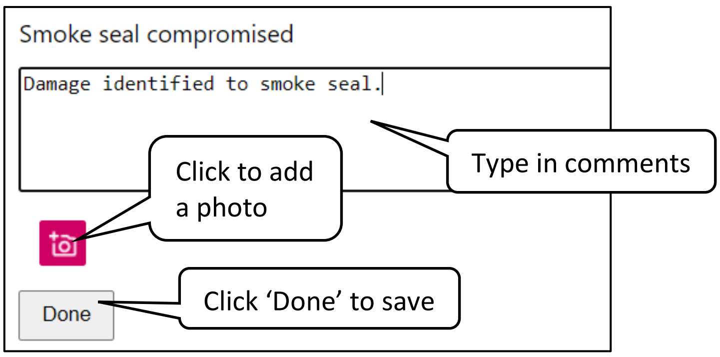


Figure 253: fire door comment

12. Once you have completed the assessment, click 'Save'.

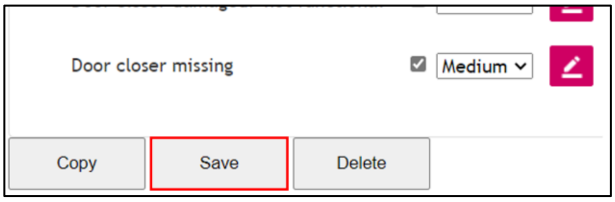


Figure 254: save the assessment

14. EcoHomes XB

Click on ‘EcoHomes XB’ on the menu bar. The EcoHomes XB module is used to assess the ecological impact of housing stock. Information on this screen is presented in widget form. For more information on how to use widgets, please refer to section 4, ‘The Summary Screen’.

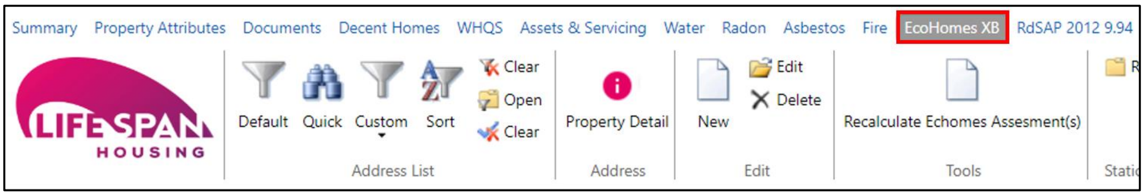


Figure 255: *location of the EcoHomes XB tab*

14.1 Adding EcoHomes XB Assessments

1. Click ‘New’ under the edit section.

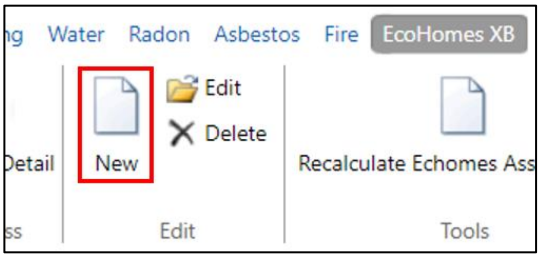


Figure 256: *adding a new assessment*

2. Complete the assessment details at the top of the screen by using the drop down fields. There is a free-text comments box to add in any additional relevant information.

3. Work through each of the tabs and enter the information accordingly. Credits are awarded to each element of the assessment by using the ‘Criteria Met’ tick boxes. Total credits are displayed at the bottom of the screen. Once each section has been completed, click ‘Save’.

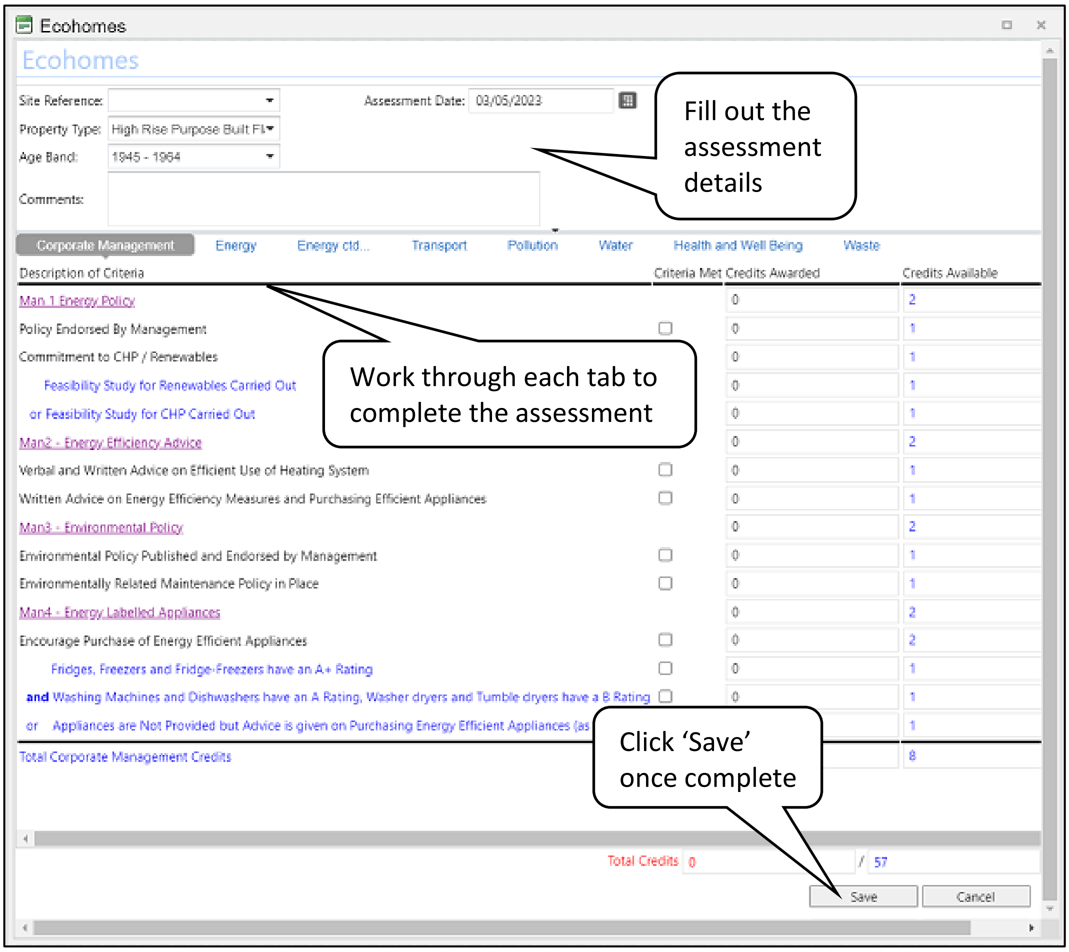


Figure 257: adding a new Ecohomes XB assessment

14.2 Editing EcoHomes XB Assessments

1. Click 'Edit' under the edit section.

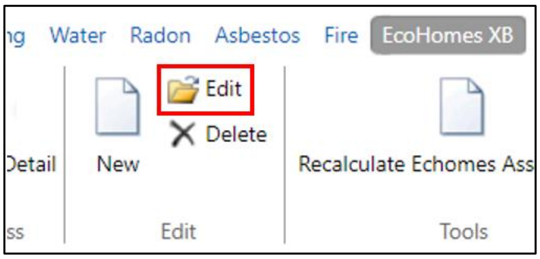


Figure 258: *editing an assessment*

2. Make any changes as required and click 'Save'.

14.3 Deleting EcoHomes XB Assessments

1. Click ‘Delete’ under the edit section.

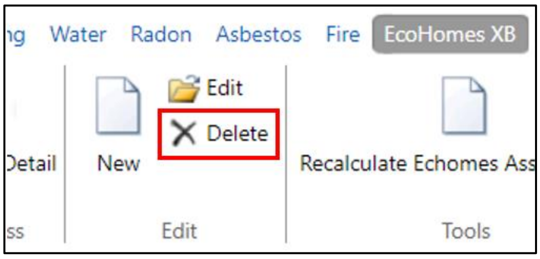


Figure 259: *deleting an EcoHomes XB assessment*

1. Click on ‘Delete’ to confirm.

Figure 260: *confirm to delete*

15. RdSAP

Click on the relevant ‘RdSAP’ version from the menu bar. The RdSAP tab shows the SAP rating of the current property and the potential rating if all improvement measures were implemented.

15.1 Adding RdSAP Assessments

1. To add an assessment, click ‘New’.

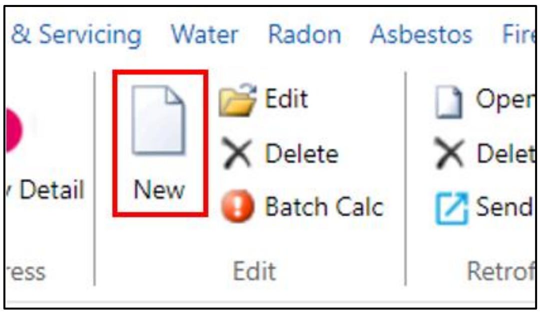


Figure 261: *location of the new button*

- The pane on the left hand side summarises the sections within Lifespan RdSAP that must be completed for each assessment.

- Navigate through the assessment by either clicking on the section header or using the ‘Previous/Next’ buttons at the top of the screen.

NOTE The ‘Previous/Next’ buttons should be used as the preferred method of navigation as they act as a form of validation by flagging any errors or omissions as you work through the assessment.

- Areas on each page have been highlighted to draw your attention to changes from the previous version of Lifespan SAP.
  - Green: additional fields
  - Blue: modified fields
  - Yellow: relocated fields

- The ‘Calculate Energy Ratings’ button can be pressed at any time once the assessment is complete. This will overwrite any reports previously created and also reset the recommendations report to its default state (i.e. no user input). Data validation is run at this point to resolve any calculation issues.

- The ‘Save Energy Data’ button should be used to save the latest assessment data inputs.

- The ‘Close’ button can be used to return to the Lifespan RdSAP module (ensure the save button is used before closing the assessment or the latest changes will not be applied).

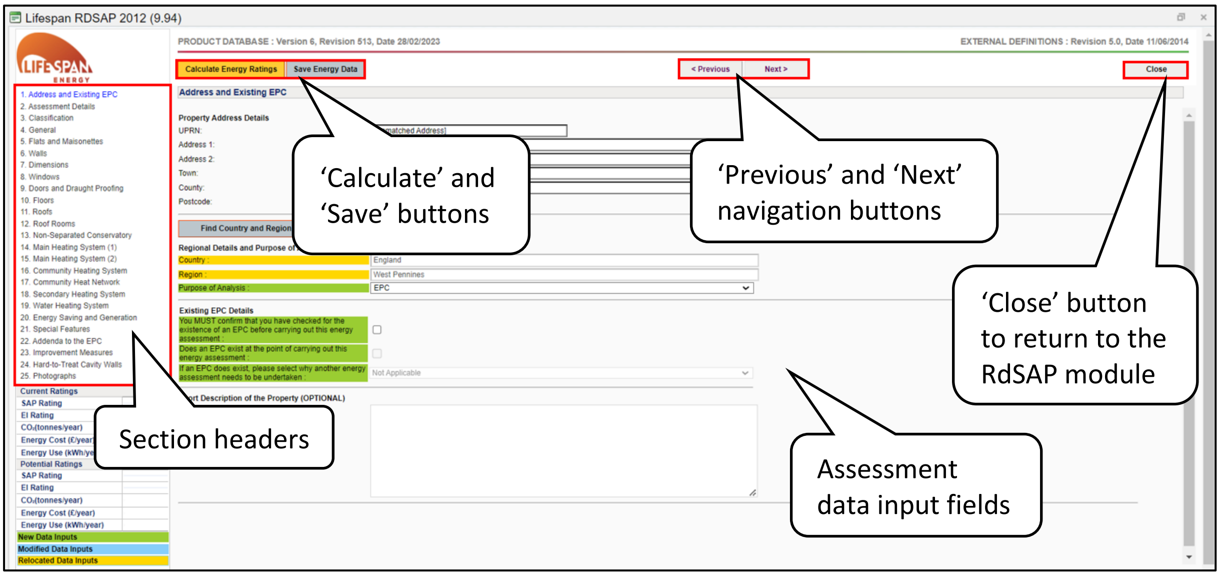


Figure 262: ***RdSAP assessment***

2. Work through the assessment using the drop-down fields to enter the appropriate data. Use the ‘Calculate’ and ‘Save’ buttons once your assessment is complete and click ‘Close’ to return to the Lifespan RdSAP module.

   For further information on RdSAP assessments, please refer to the following resources.

- The Governments Standard Assessment Procedure for Energy Rating Of Dwellings 2012 edition
- RdSAP conventions v11.3 issued March 2022
- SAP Appendix Q database (http://www.ncm-pcdb.org.uk/sap/page.jsp?id=18)
- Lifespan RdSAP User Manual v9.94

15.2 Editing RdSAP Assessments

1. To amend an existing assessment, click ‘Edit’.

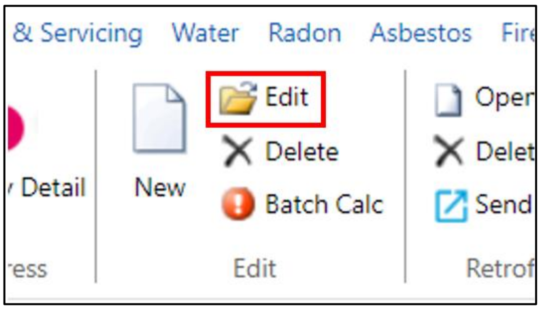


Figure 263: *location of the edit button*

2. Make any changes to the assessment as required. Use the ‘Calculate’ and ‘Save’ buttons and click ‘Close’ once completed to return to the main screen.

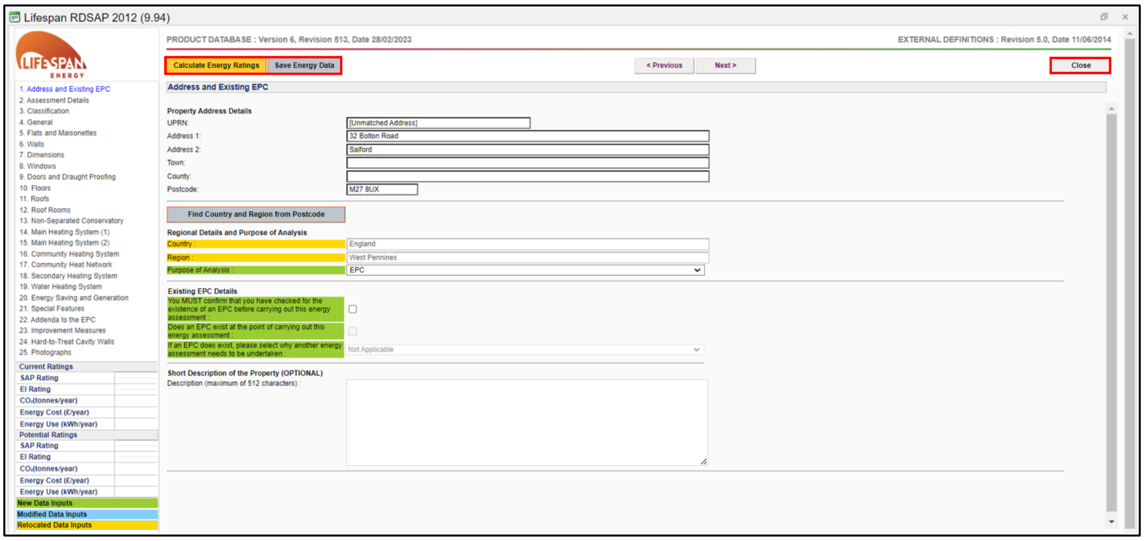


Figure 264: *editing an RdSAP assessment*

15.3 Deleting RdSAP Assessments

1. To remove an existing assessment, click ‘Delete’.

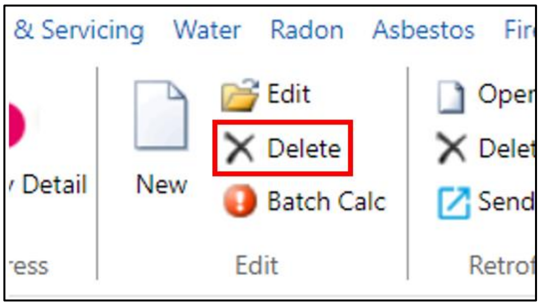


Figure 265: *location of the delete button*

2. Click 'Remove' to delete.

Figure 266: *confirm the removal*

15.4 Occupancy Assessments

As part of the PAS 2035 retrofit works, an occupancy assessment is required alongside the energy data as part of the submission pack to TrustMark. The data can be collected as part of a survey carried out using the mobile software or entered directly into Lifespan Housing.

To access the occupancy assessment data, navigate to the energy module and click 'Open' within the Retrofit section of the menu bar.

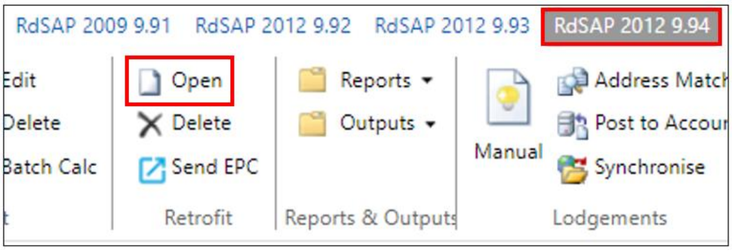


Figure 267: *retrofit 'open' button*

This will open the 'Lifespan OA-SAP' area to include both energy and occupancy data for the selected property. In a similar format to the RdSAP edit pages, all sections of the assessments will be listed on the left, leaving the main screen to show the data fields and inputs.

The RdSAP data is grouped together and below is the occupancy data, to view data for a specific section click on the heading from the list or use the 'Previous' and 'Next' buttons at the top of the screen. You can make any necessary changes to the data by updating fields as required, the majority of questions use drop-down lists – click into the field to select the correct option.

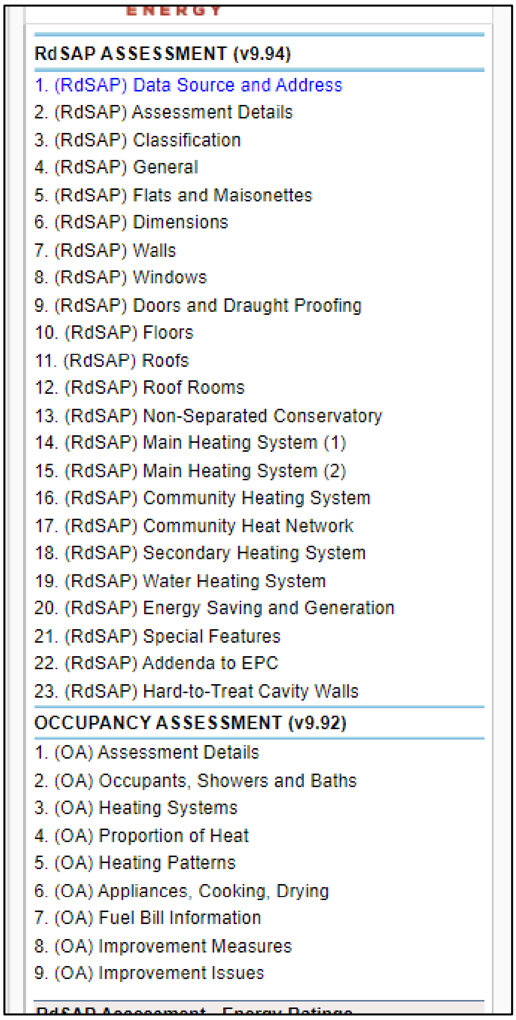


Figure 268: *Lifespan OA-SAP assessment headings*

To calculate and save the assessments, use the applicable button at the top of the screen. different

Figure 269: *calculate and save buttons*

Once the assessments have been calculated, the energy ratings and household energy usage details will be populated. This information can be found in the bottom left of the screen, underneath the assessment headings.

RdSAP Assessment - Energy Ratings	
SAP Rating	D59
EI Rating	D56
CO_2 (tonnes/year)	3.9
Energy Cost (£/year)	£974
Energy Use (kWh/year)	22,492
Occupancy Assessment - Actual Household	
Energy Cost (£/year)	£1,666
Energy Use (kWh/year)	20,333
Occupancy Assessment - Typical Household	
Energy Cost (£/year)	£1,599
Energy Use (kWh/year)	18,838

Figure 270: *energy ratings and household energy usage*

Click 'Close' to return to the RdSAP module. Ensure the assessments have been saved before leaving the editing page or you will lose any changes that have been made.

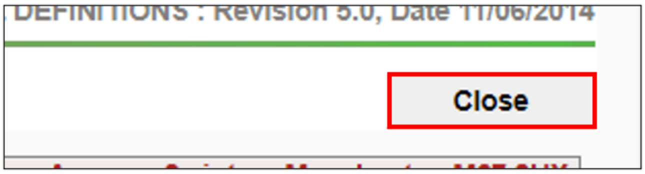


Figure 271: *close button*

15.5 Lodgement Process (via Lifespan RdSAP)

At the top of the RdSAP module screen you will see by default the widgets 'Energy Efficiency Ratings' and 'Last Lodged EPC'. In order for the 'Last Lodged EPC' widget to display the latest lodgement information, the data needs to be synced with the EPC register to pull through the relevant data.

NOTE To retrieve the lodgement data, the EPC needs to have been lodged via a Lifespan RdSAP assessor account.

Once energy data is present in Lifespan, whether this has been entered by the user interface or uploaded from the mobile software, there are three processes to follow to eventually retrieve the lodged EPC data. These processes are address matching, posting to account and synchronising.

15.5.1 Address Match

Address matching is the process of assigning a Government UPRN to a property in order to create a link between an address in Lifespan and the corresponding address on the Government register. This can be done either in Lifespan Web or in an assessors RdSAP account, however the benefit of doing this in Web is it can be done for multiple addresses in one go. You would also need to have the information in Lifespan in order to complete the synchronise after lodgement so it reduces any duplication of steps.

1. Search for the address(es) you want to address match.

2. For an individual property just highlight the required address, for multiple select all required (using the tick box selection to the left of the property).

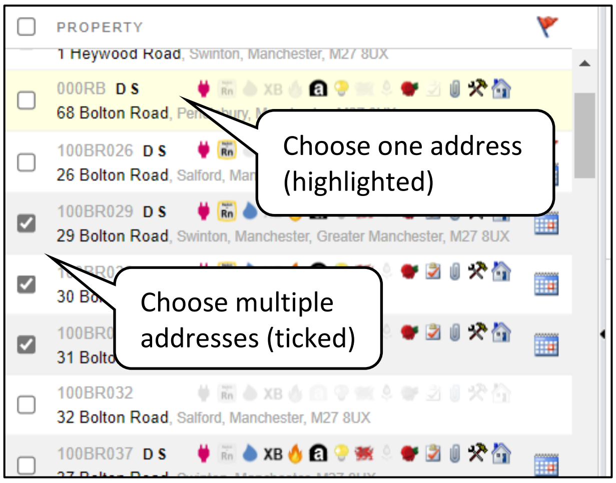


Figure 272: select one or multiple addresses

3. Navigate to the applicable RdSAP module and click ‘Address Match’ within the lodgements section.

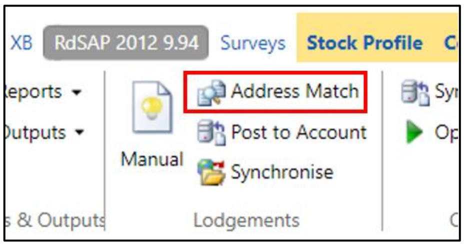


Figure 273: address match

4. Select either ‘highlighted property’ or ‘ticked properties’ from the options based on your initial address selection and click ‘Continue’.

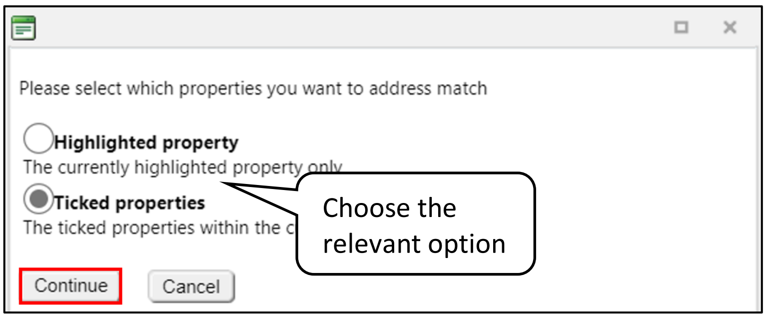


Figure 274: address match property selection

5. The next screen will display the properties and allow you to review the match before saving, the 'Matched UPRN' will be displayed in the far right column. If any of you're selected addresses have already been matched they will not appear on the list. If any have more than one match, you will see a drop down selection under the 'Matched Address' column against the property – choose the correct address before clicking 'Save'. By default, the drop-down will display 'Skip' and if left at this value, your address will not be matched.

NOTE If the correct address is not present in the drop-down list, please review the address details in Lifespan to make sure they are right. The software searches by address and postcode so if these are not recorded correctly it will not be able to find the best match until updated.

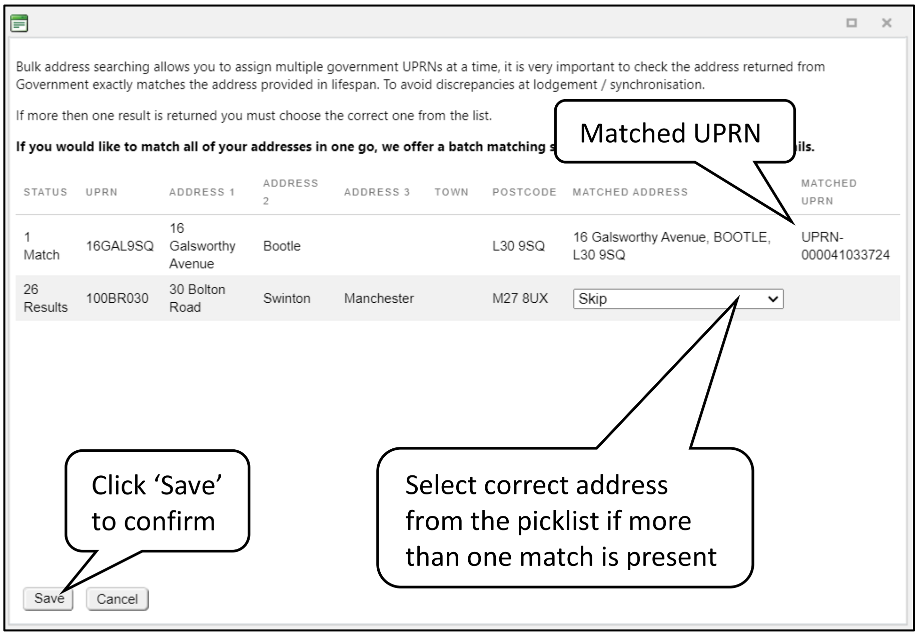


Figure 275: assign matched UPRNs

6. Once saved, the addresses will be matched. To view the details, click the 'Edit' button within the 'Summary' module for a selected address. The 'Government UPRN' field will be populated with the same value as shown in the address match screen.

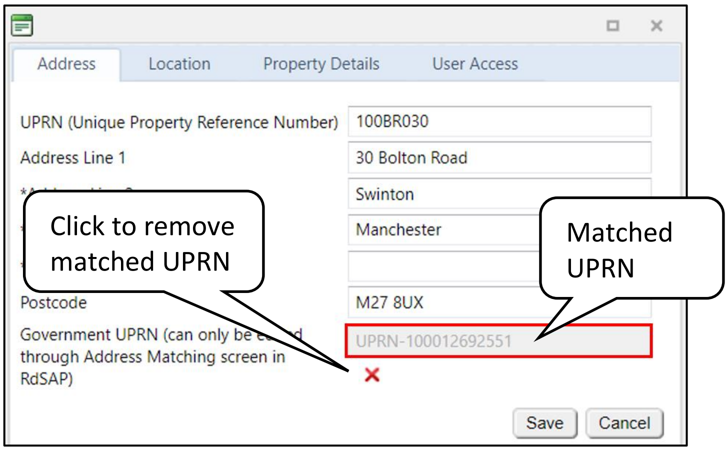


Figure 276: edit address screen

7. To remove a Government UPRN (if matched in error etc.), click on the ‘X’ symbol beneath the UPRN. You can then repeat the steps above to re-match to the correct address.

15.5.2 Post to Account

The ‘Post to Account’ function allows you to transfer the energy data from Lifespan Web to an assessors Lifespan RdSAP account in order for them to lodge the EPC.

Before posting the energy data, it is advisable to first calculate all applicable assessments. This reduces any potential calculation errors or corrections required at the lodgement stage. Please refer to section **15.1 Adding RdSAP Assessments** for guidance on calculating energy assessments.

1. Search for the address(es) for which you want to transfer the energy data.

2. For an individual property just highlight the required address, for multiple select all required (using the tick box selection to the left of the property).

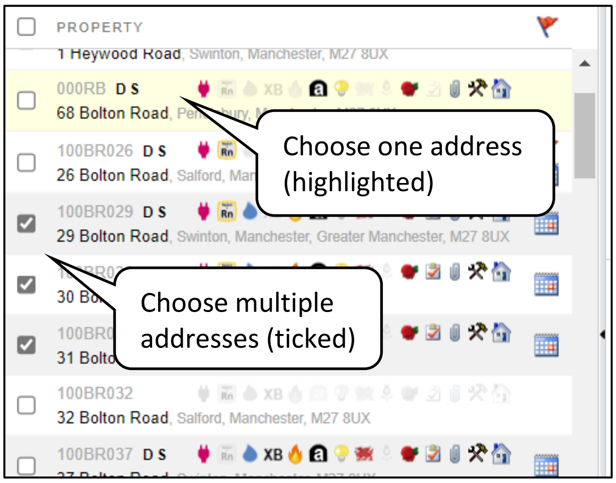


Figure 277: select one or multiple addresses

3. Navigate to the applicable RdSAP module and click ‘Post to Account’ within the lodgements section.

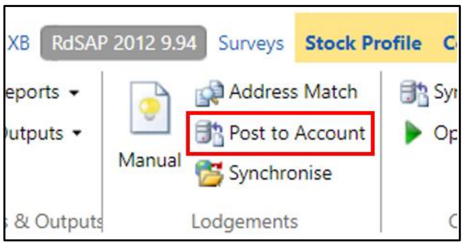


Figure 278: post to account

4. Choose the applicable option for whether you want to send data for the highlighted, ticked or filtered properties and click ‘Continue’.

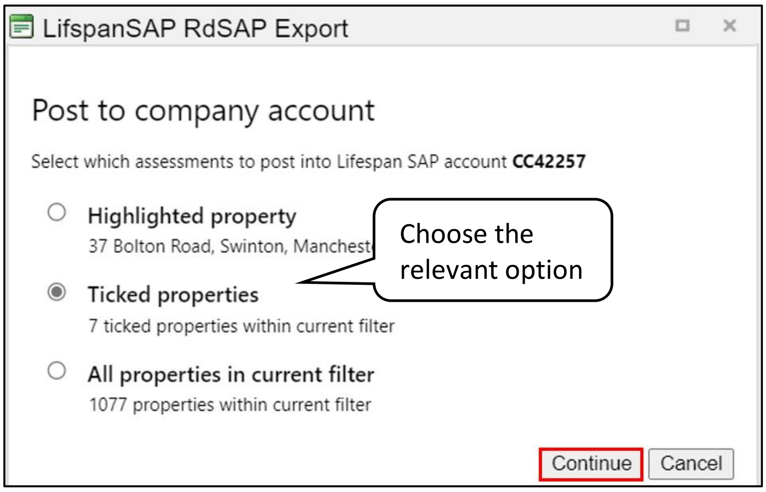


Figure 279: data export property selection

5. The next ‘LifespanSAP RdSAP Export’ screen provides an overview of whether the surveys have been matched, the surveyor name and number of assessments for each surveyor. Review the details and if correct, click ‘Send’.

NOTE The software uses the ‘Surveyor Name’ property attribute to determine which assessor account to transfer the data to.

- If the incorrect surveyor is listed, please update the property information attribute accordingly.
- If no attribute exists, the error ‘No surveyors have been linked to the account in RdSAP.’ will be displayed. Add a new surveyor name attribute to the relevant property to continue.

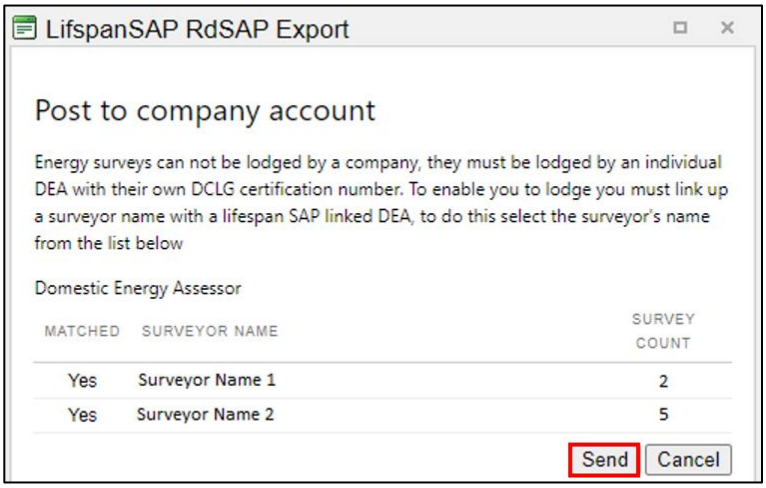


Figure 280: data export match screen

NOTE The assessor account will need to be linked by PT in order for this feature to work. Please raise a support ticket via the helpdesk to request your account to be linked, including details of each surveyor account that needs to be updated. Please refer to section **24. IT & Data Support** for guidance on how to raise a support ticket.

6. You will receive confirmation once the data has been posted. At this point, the assessor will be able to access the address(es) via their RdSAP account and complete the lodgement as normal.

15.5.3 Synchronise

The 'Synchronise' function allows you to retrieve the lodgement information once the EPC has been lodged. Lifespan software uses the Government UPRN as the link to locate the most recent lodgement data so it's essential that the address matching step has been completed in Lifespan for each property or you will not be able to sync the data.
Please refer to section **15.5.1 Address Match** for guidance on how to match an address to a Government UPRN.

1. Search for the address(es) for which you want to retrieve the energy data.

2. For an individual property just highlight the required address, for multiple select all required (using the tick box selection to the left of the property).

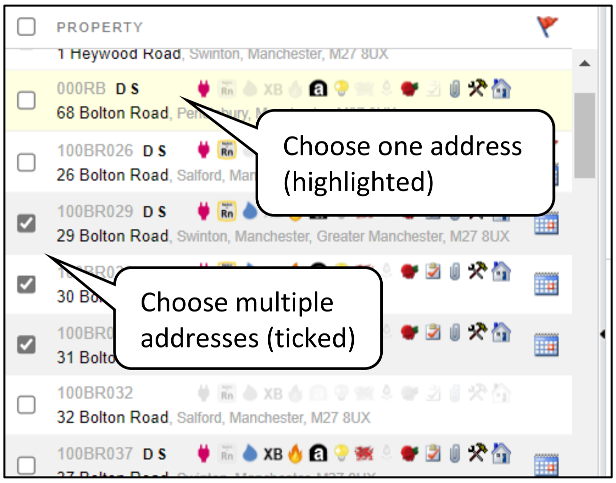


Figure 281: select one or multiple addresses

3. Navigate to the applicable RdSAP module and click 'Synchronise' within the lodgements section.

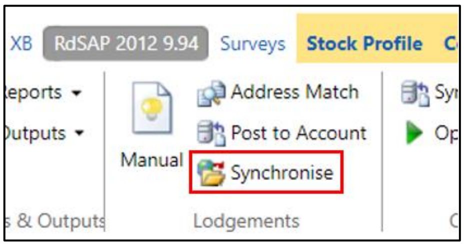


Figure 282: synchronise

4. Choose the applicable option for whether you want to send data for the highlighted, ticked or filtered properties. There is an additional tick box to 'Exclude properties with an existing lodged EPC' which can be used if required, then click 'Synchronise'.

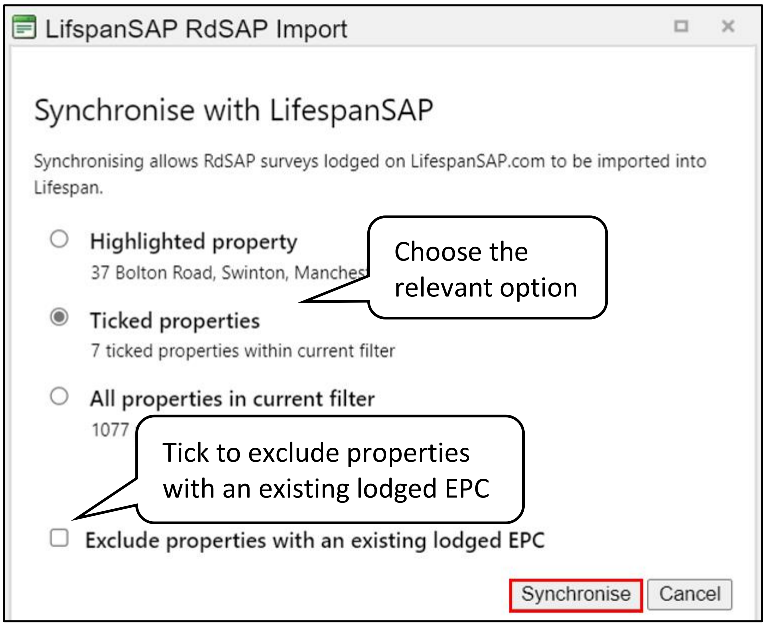


Figure 283: data import property selection

5. The software will complete the synchronise process and provide an overview screen with the results. Review the information and repeat the steps within the section as required until all properties are successfully imported. Click 'Close' to return to the RdSAP module.

   Errors generally occur as below:

   - **Properties skipped**
     This suggests that either the property has not been address matched or it has been matched to an incorrect property.
     (A suggestion for this is to double check the Government UPRN detail in the 'Edit' section on the property summary to make sure there is data present. If so, it may be worth removing and re-assigning to make sure the correct UPRN was selected).

   - **Properties not found**
     This suggests that an energy assessment has not been lodged against the property.
     (A suggestion for this is to double check the EPC register to confirm that an EPC exists for the property, if so make sure it was lodged via a Lifespan RdSAP assessors account).

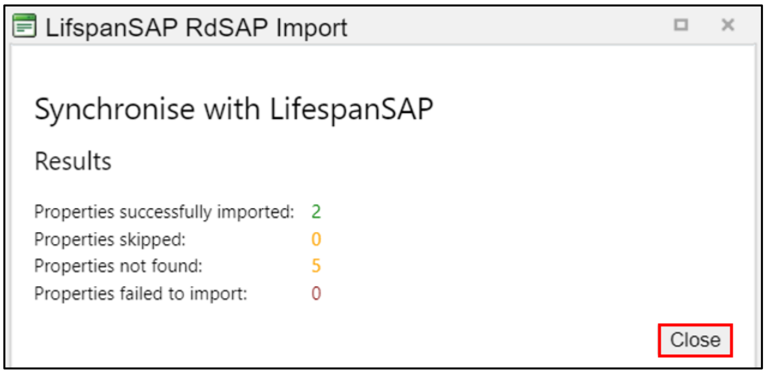


Figure 284: RdSAP import results

16. Surveys

Click on ‘Surveys’ on the menu bar. This screen holds information on all mobile surveys collected for a selected property.

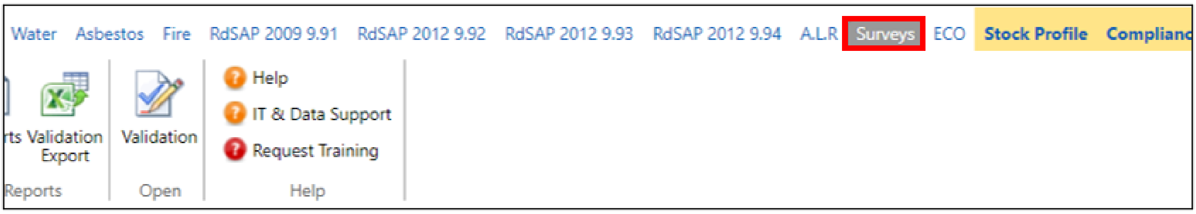


Figure 285: *location of the Surveys tab*

The survey itself should be completed on site using the Lifespan Mobile software. Please refer to the Lifespan Mobile manual for guidance on how to input the survey data and upload to Lifespan Housing.

Once uploaded, the data will be transferred into the ‘Surveys’ module. On the main screen you will see a summary of the address selected, including property details, last survey, completed surveys and survey management information.

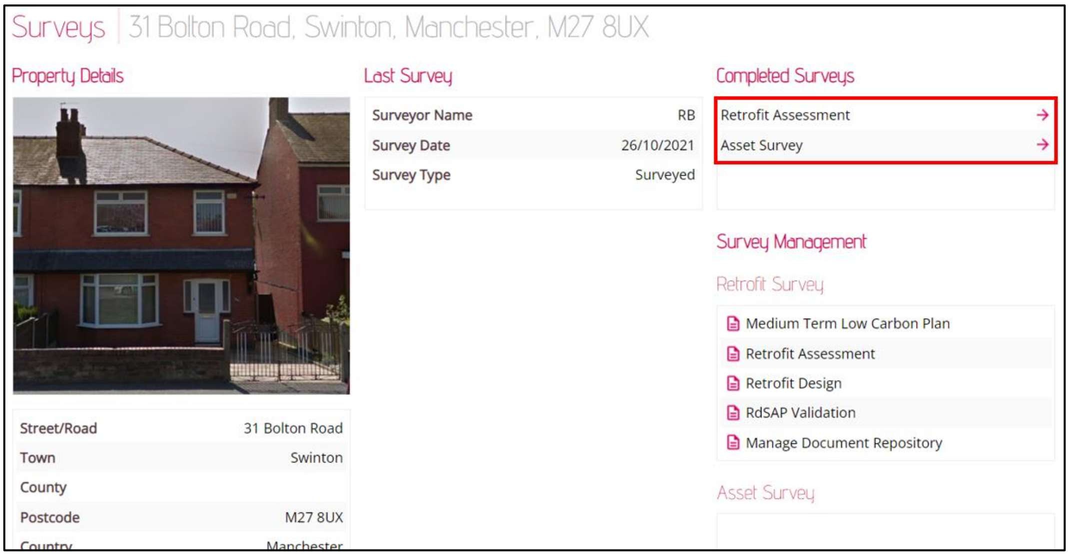


Figure 286: *review completed surveys*

All available surveys will be listed within the ‘Completed Surveys’ section. To view the data, click on the survey you want to access to open the details in a new window. The information is displayed in an online report format, with the property photos at the top of the report and survey data following on in the same order as captured in the survey template. Scroll down the page to review the report, any photographs taken within the survey will be visible to the right of the associated question. Click on any image to enlarge it, tap close to return to the survey.

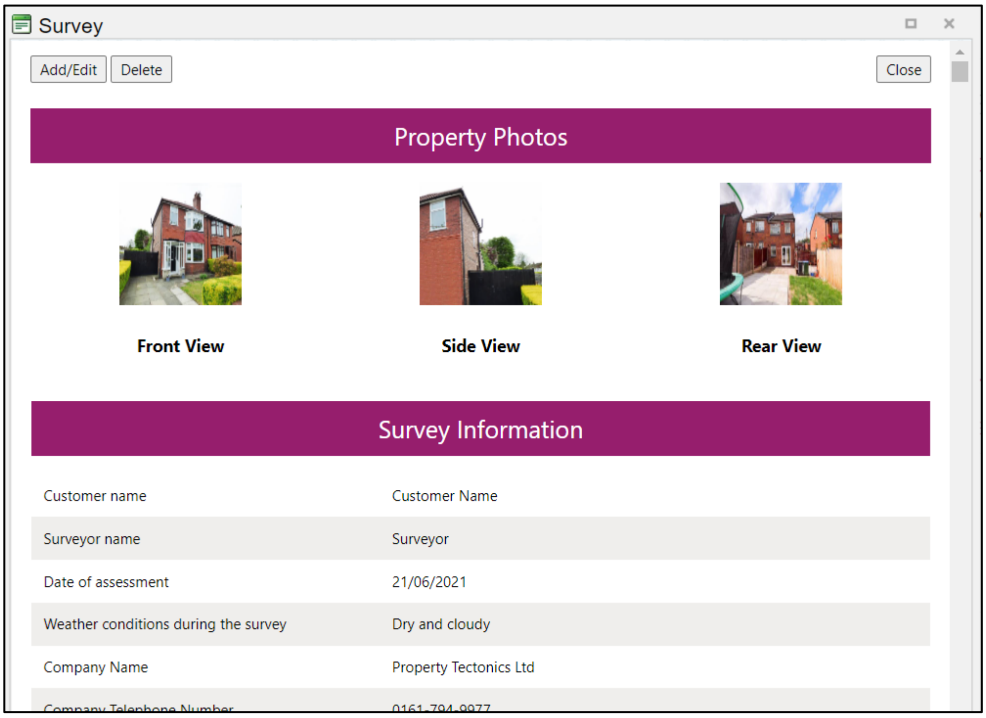


Figure 287: *review survey data*

NOTE The survey data can also be reviewed via the 'Property Attributes' module under the 'Retrofit Assessment' and 'Asset Survey' headers. Please refer to sections **5.1 Retrofit Assessment** and **5.2 Asset Survey** for further details.

16.1 Editing a survey

To edit a survey for a specific property, select the address and open the 'Retrofit Assessment' within the survey module to access the data, then click 'Add/Edit' at the top of the screen.

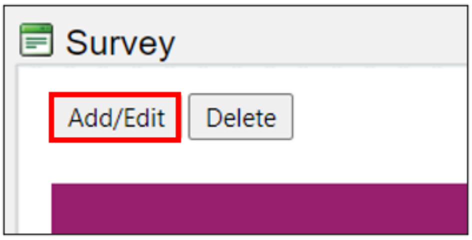


Figure 288: *add/edit survey button*

You will now see the 'Edit Survey' screen, giving you the ability to add new or edit existing fields within the survey. On the left, you will see all the section headings and on the right are all the template questions. At this point the survey will have been completed on site so you will have the majority if not all of the applicable data already answered.

To add or edit a field, go to the relevant question and update the answer – dependent on the question, this will either be a date, number, free text or picklist option. Anything that shows in this section as 'Select option…' is currently a blank field and the question will not appear in your survey report. Comments can be added by using the 'Enter Comments…' field on the right and are linked up to the question listed on the same row. Once done, click 'Save' to apply the changes to the survey.

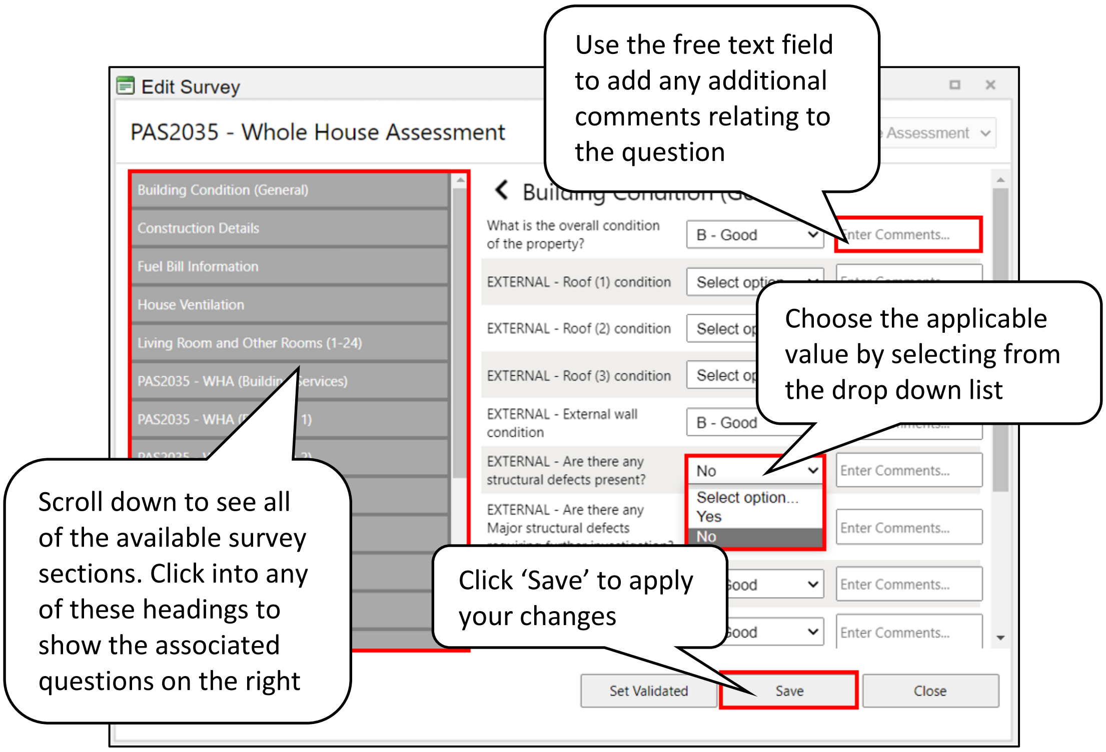


Figure 289: *edit a survey*

NOTE Any comments added into the survey at this stage will appear in the edit screen however will not be visible in the survey view or report output. You will be able to review all comments via the applicable tab in the 'Property Attributes' module.

16.2 Adding photographs

To add a new photograph into the survey for a specific property, select the address and open the assessment within the survey module to access the data. Click 'Add/Edit' at the top of the screen, then locate and click the 'Photograph' heading from the list on the left.

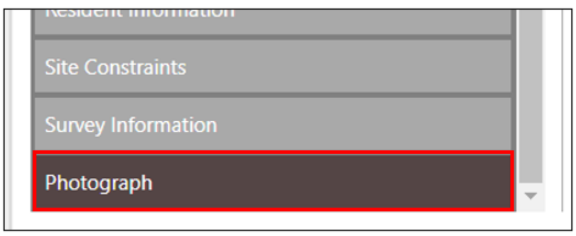


Figure 290: *photograph button*

In addition to the headings on the left, the list is duplicated on the main screen along with all associated questions. Click on a heading on the right to expand the list and reveal the relevant questions below.

1. Find the question you want to add a photograph to and click ‘Select’ on the right of the corresponding row, choose the image file from your computer.

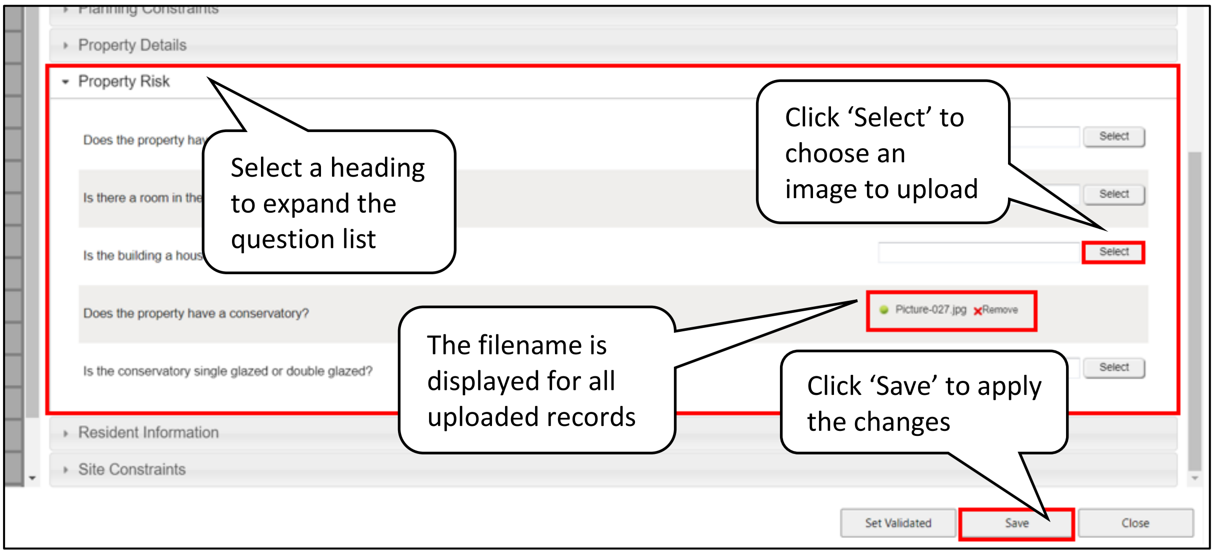


Figure 291: ***add a new photograph***

2. Repeat step one to include additional photographs as required, then click ‘Save’ to apply the changes. The images will now appear in your survey next to the applicable question.

NOTE There are restrictions to the number of photographs you can add into the survey. This is dependent on the individual question and has been pre-determined within the survey template. For questions where multiple images can be added, the ‘Select’ button will remain next to the question until the full quantity has been uploaded.

16.3 Deleting photographs

To delete an existing photograph, navigate to the ‘Photograph’ heading within the add/edit section of the survey.

1. Find the question you want to delete the photograph from and you should see a small thumbnail image to the right. Click in the tick box to the right of the image you want to remove.

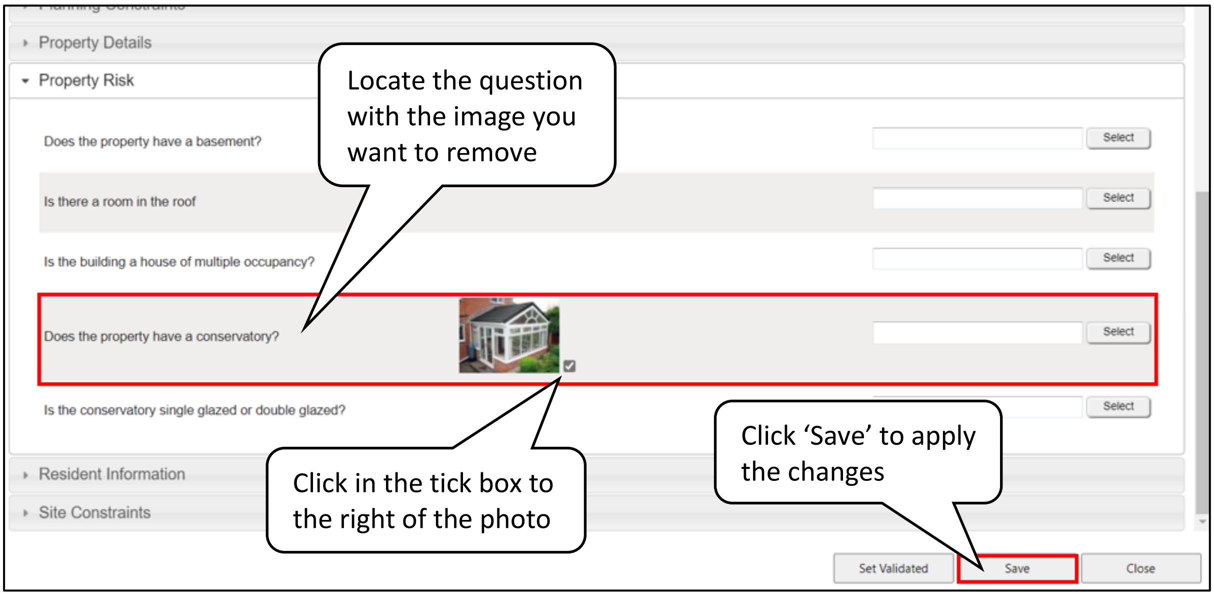


Figure 292: ***delete a photograph***

2. Repeat step one to delete further photographs as required, then click 'Save' to apply the changes. The images will no longer exist within your survey when you return to the report.

NOTE For instances where you want to delete a photograph for a question with more than one existing image, ensure you click in the correct tick box to remove it as once this is done there is no way to retrieve the photo. It would have to either be manually added back in or the survey re-uploaded if originally taken within Lifespan Mobile. You should always select the tick box to the right of the image you want to delete.

16.4 Deleting a survey

There may be instances where you need to remove an entire survey for a property, if uploaded in error or against an incorrect address. If this is the case the survey can be deleted for a property using the 'Delete' button on the survey page.

1. Select the address and open the assessment within the survey module to access the data, then click 'Delete' at the top of the screen.

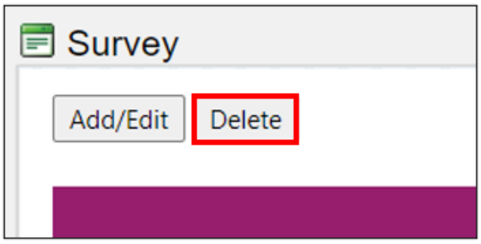


Figure 293: ***delete survey button***

2. Click 'Delete' on the confirmation screen to remove the survey data.

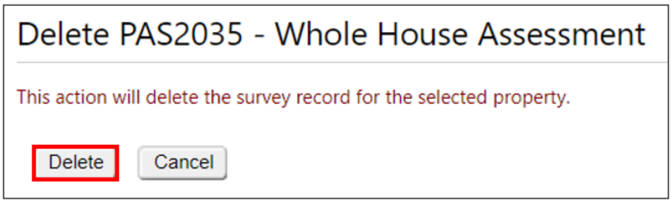


Figure 294: *delete button confirmation*

16.5 Survey data checks

You have seen in sections **5.1 Retrofit Assessment**, **5.2 Asset Survey** and **16. Surveys** how to view the survey data for an individual property, however there is also an export sheet within the 'Surveys' module which allows you to review data in bulk. This will enable you to review all information collected for any properties in your account containing a survey under a specific definition.

1. Within the 'Surveys' module, locate the 'Reports' section and click on the 'Validation Export' button.

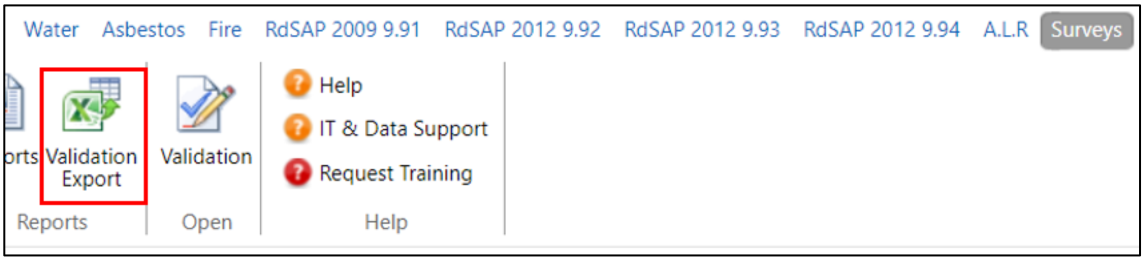


Figure 295: *validation export button*

2. Select the correct survey definition from the drop-down list, in this example 'PAS 2035 – Whole House Assessment' and then click 'Export'. This will generate an excel spreadsheet download to include all the survey data.

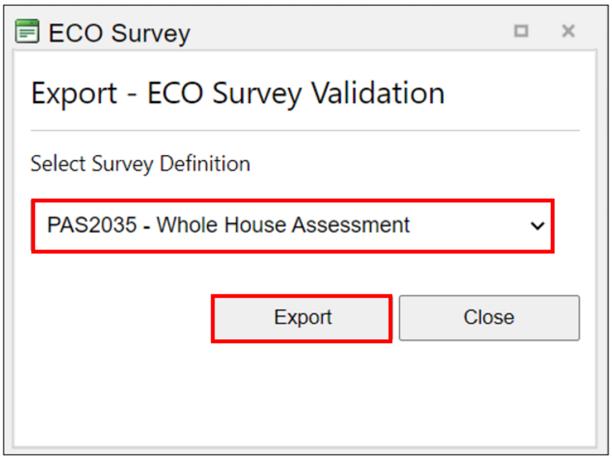
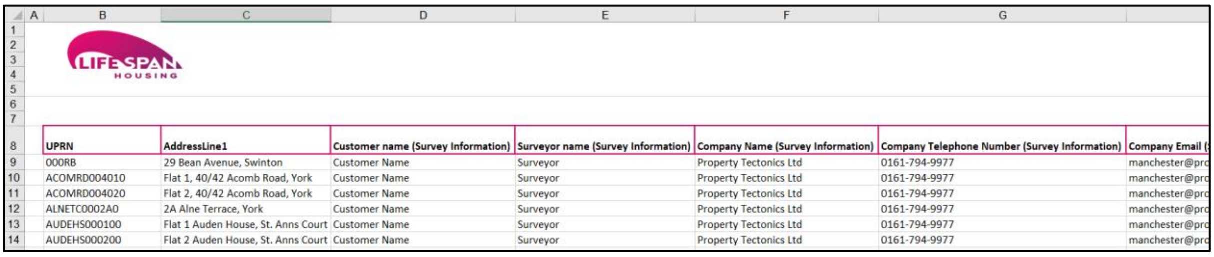


Figure 296: *export survey data*

Each row on your spreadsheet relates to an individual property and each column represents a different question from the survey. As below, each of the column headers displays the survey question, along with details in brackets of which section of the survey this field can be found.



UPRN	AddressLine1	Customer name (Survey Information)	Surveyor name (Survey Information)	Company Name (Survey Information)	Company Telephone Number (Survey Information)	Company Email (
000RB	29 Bean Avenue, Swinton	Customer Name	Surveyor	Property Tectonics Ltd	0161-794-9977	manchester@prc
ACOMRD004010	Flat 1, 40/42 Acomb Road, York	Customer Name	Surveyor	Property Tectonics Ltd	0161-794-9977	manchester@prc
ACOMRD004020	Flat 2, 40/42 Acomb Road, York	Customer Name	Surveyor	Property Tectonics Ltd	0161-794-9977	manchester@prc
ALNETC0002A0	2A Alne Terrace, York	Customer Name	Surveyor	Property Tectonics Ltd	0161-794-9977	manchester@prc
AUDEHS000100	Flat 1 Auden House, St. Anns Court	Customer Name	Surveyor	Property Tectonics Ltd	0161-794-9977	manchester@prc
AUDEHS000200	Flat 2 Auden House, St. Anns Court	Customer Name	Surveyor	Property Tectonics Ltd	0161-794-9977	manchester@prc

Figure 297: *survey data*

This sheet provides an easy way of cross-checking data collected across all properties and helps to identify any anomalies or missing data from the survey which can then be passed onto the surveyor for review. If you detect anything that needs updating, you can then use the add/edit function to make changes as necessary – please refer to section **16.1 Editing a survey** for guidance on how to update the survey.

17. Stock Profile

Click on 'Stock Profile' on the menu bar. The stock profile tab shows an overview of all properties. Information here is presented in widget form. For more information on how to use widgets, please refer to section **4. The Summary Screen**.

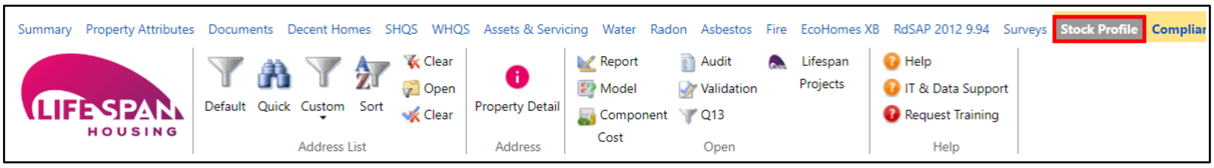


Figure 298: *location of the stock profile tab*

Click on any of the blue links within the widgets displayed to download an Excel spreadsheet containing the corresponding information.

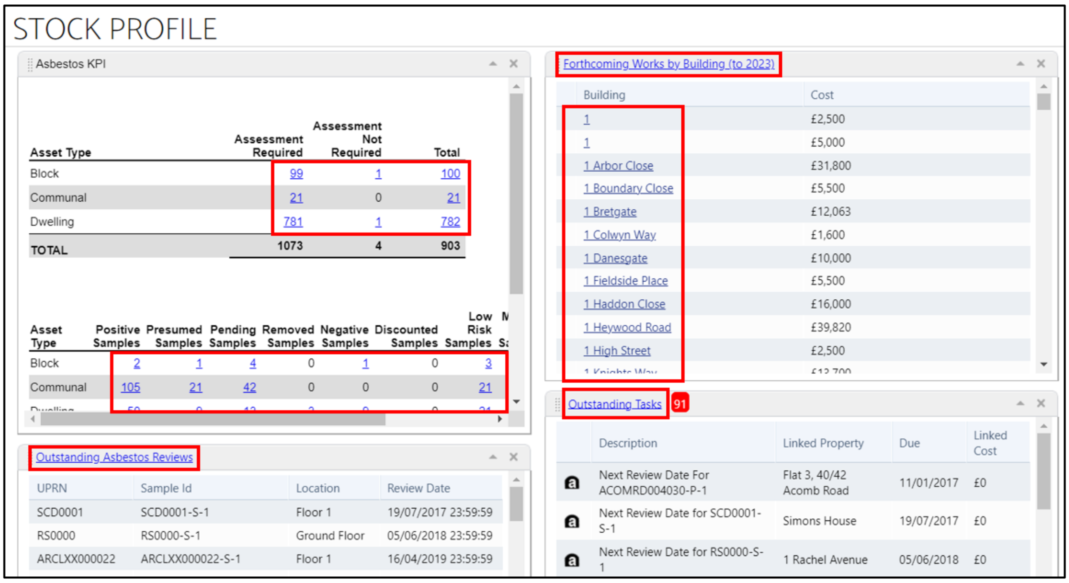


Figure 299: *stock profile page*

18. Compliance

Click on 'Compliance' on the menu bar. This tab provides an overview of fire, appliance and asbestos compliance, displaying data for all stock in chart format.

Figure 300: location of the compliance module

At the top of the screen, you will see an overview bar, outlining the percentage of assessments undertaken and overdue for each relevant module.

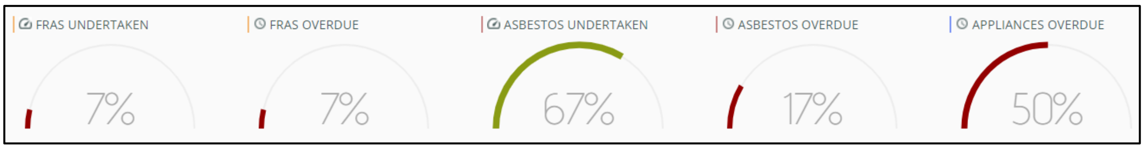
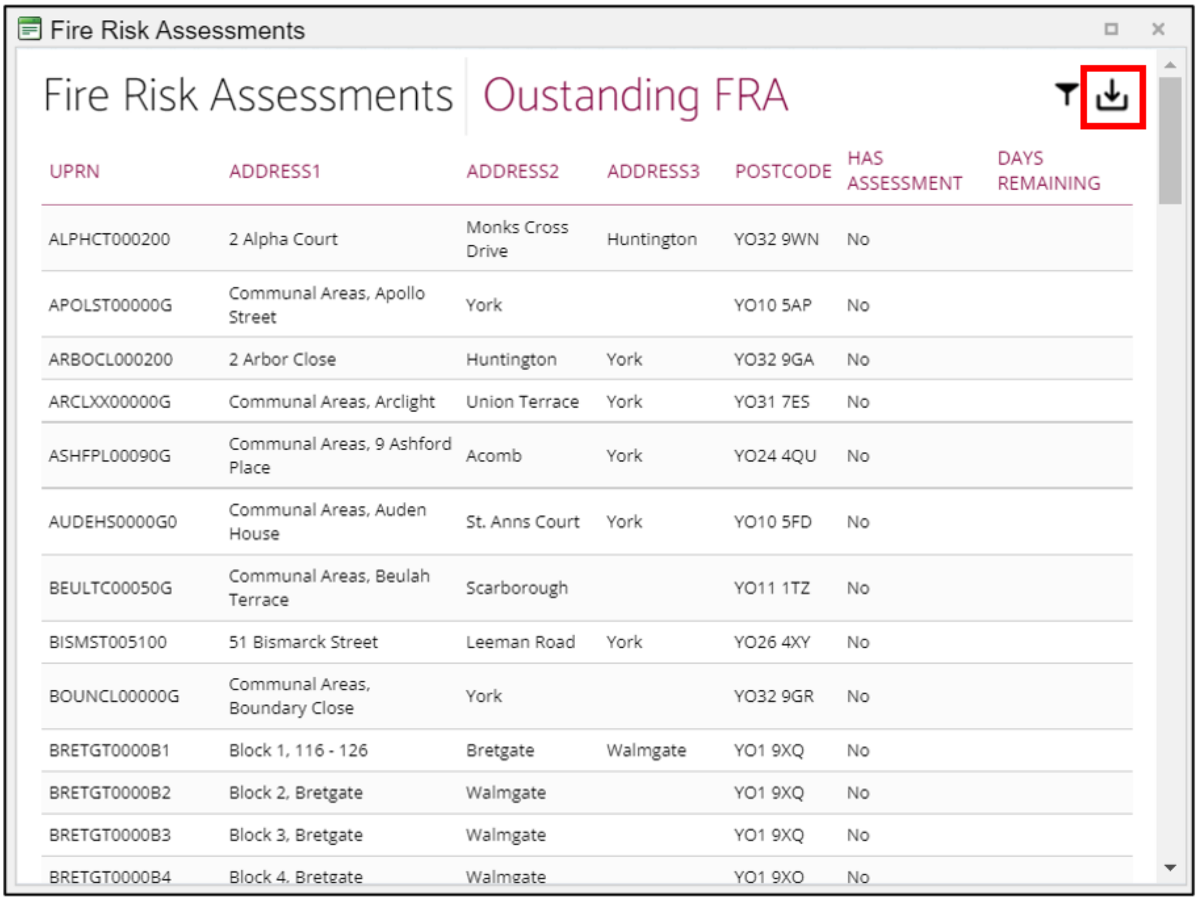


Figure 301: *compliance overview*

Below this a number of charts are presented to show data under eight different criteria, providing further detail on the number and specific properties associated with each. All charts are interactive, hovering over the bars will give exact figures and you can click on each to generate a property list which can be downloaded to an excel spreadsheet.

Figure 302: ***hover to view property count***

View the data on screen or tap on the download button in the property list view to generate the excel report for the criteria selected.



UPRN	ADDRESS1	ADDRESS2	ADDRESS3	POSTCODE	HAS ASSESSMENT	DAYS REMAINING
ALPHCT000200	2 Alpha Court	Monks Cross Drive	Huntington	YO32 9WN	No	
APOLST00000G	Communal Areas, Apollo Street	York		YO10 5AP	No	
ARBOCL000200	2 Arbor Close	Huntington	York	YO32 9GA	No	
ARCLXX00000G	Communal Areas, Arclight	Union Terrace	York	YO31 7ES	No	
ASHFPL00090G	Communal Areas, 9 Ashford Place	Acomb	York	YO24 4QU	No	
AUDEHS0000G0	Communal Areas, Auden House	St. Anns Court	York	YO10 5FD	No	
BEULTC00050G	Communal Areas, Beulah Terrace	Scarborough		YO11 1TZ	No	
BISMST005100	51 Bismarck Street	Leeman Road	York	YO26 4XY	No	
BOUNCL00000G	Communal Areas, Boundary Close	York		YO32 9GR	No	
BRETGT0000B1	Block 1, 116 - 126	Bretgate	Walmgate	YO1 9XQ	No	
BRETGT0000B2	Block 2, Bretgate	Walmgate		YO1 9XQ	No	
BRETGT0000B3	Block 3, Bretgate	Walmgate		YO1 9XQ	No	
BRETGT0000B4	Block 4, Bretgate	Walmgate		YO1 9XQ	No	

Figure 303: ***outstanding FRA property list***

Where the bar chart includes a key, you can tab on the description to remove the details from the chart.

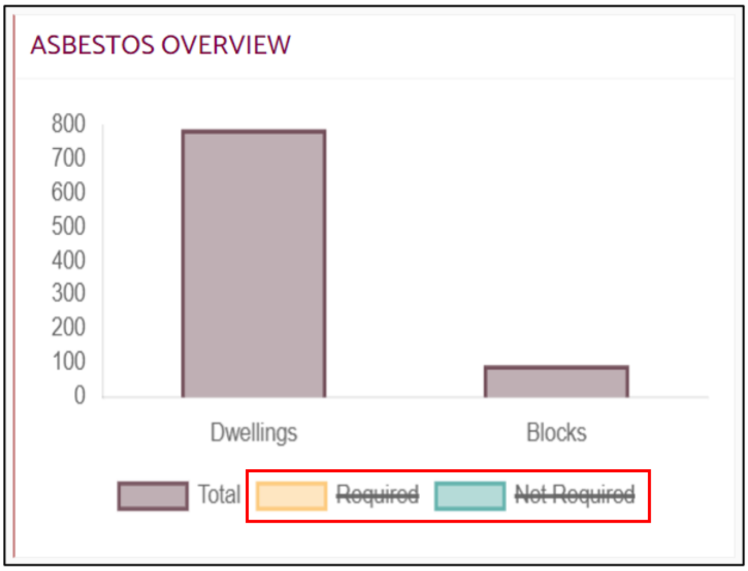


Figure 304: *modify chart display*

Right click in any of the charts and select the relevant option to either save or copy the image.

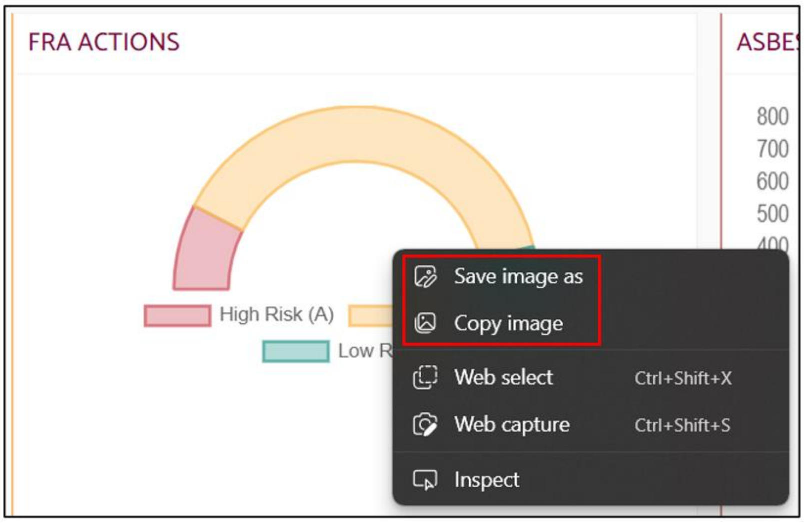


Figure 305: *save or copy image*

19. Fire Stock Profile

Click on 'Fire Stock Profile' on the menu bar. This tab provides an overview of the fire risk assessment data for all housing stock in chart and table format.

Figure 306: location of the fire stock profile module

At the top of the screen, you will see a risk summary detailing the total number of blocks in the account followed by number of assessments required, assessed, outstanding and overdue.

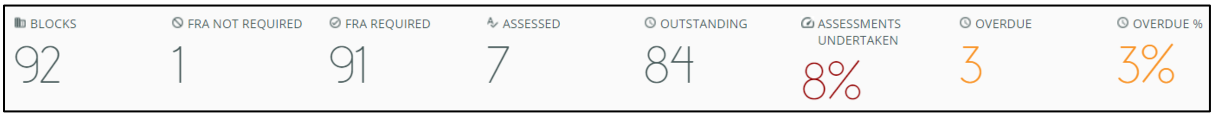


Figure 307: ***fire risk summary***

Below this a number of charts and tables are presented to show data under six different criteria, looking at the access overview, risk level, delivery team, overdue assessments, risk management and compliance. All charts are interactive, hovering over the bars will give exact figures and you can click on each to generate a property list which can be downloaded to an excel spreadsheet.

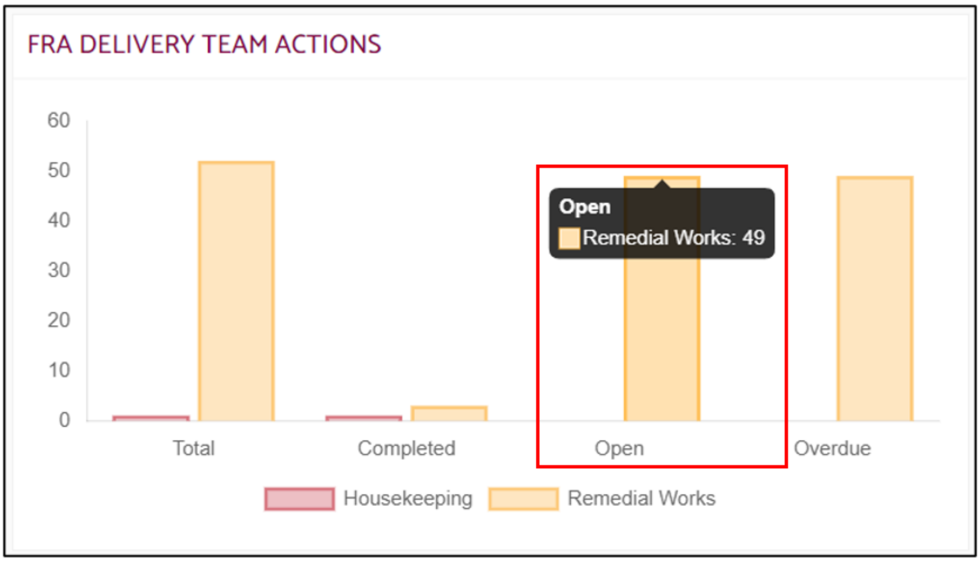
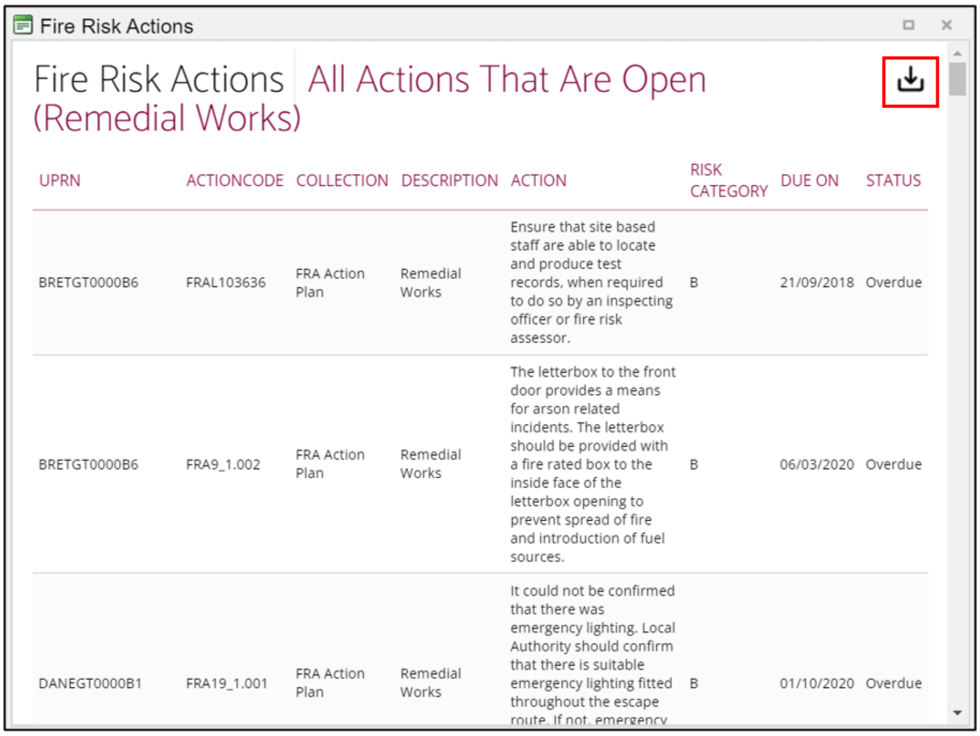


Figure 308: ***hover to view property count***

View the data on screen or tap on the download button in the property list view to generate the excel report for the criteria selected.

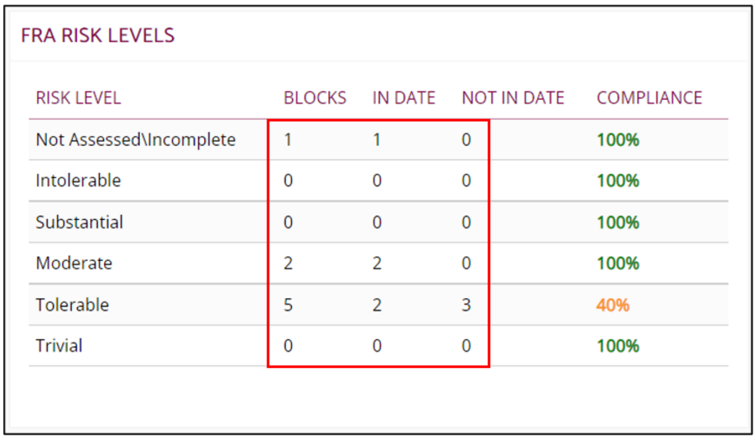

Fire Risk Actions

Fire Risk Actions All Actions That Are Open (Remedial Works)

UPRN	ACTIONCODE	COLLECTION	DESCRIPTION	ACTION	RISK CATEGORY	DUE ON	STATUS
BRETGT0000B6	FRAL103636	FRA Action Plan	Remedial Works	Ensure that site based staff are able to locate and produce test records, when required to do so by an inspecting officer or fire risk assessor.	B	21/09/2018	Overdue
BRETGT0000B6	FRA9_1.002	FRA Action Plan	Remedial Works	The letterbox to the front door provides a means for arson related incidents. The letterbox should be provided with a fire rated box to the inside face of the letterbox opening to prevent spread of fire and introduction of fuel sources.	B	06/03/2020	Overdue
DANEGT0000B1	FRA19_1.001	FRA Action Plan	Remedial Works	It could not be confirmed that there was emergency lighting. Local Authority should confirm that there is suitable emergency lighting fitted throughout the escape route. If not, emergency	B	01/10/2020	Overdue

Figure 309: ***open fire risk actions***

Click on the figures within the tables to open the property list and either view the data on screen or tap on the download button in the property list to generate the excel report for the criteria selected.


FRA RISK LEVELS

RISK LEVEL	BLOCKS	IN DATE	NOT IN DATE	COMPLIANCE
Not Assessed\Incomplete	1	1	0	100%
Intolerable	0	0	0	100%
Substantial	0	0	0	100%
Moderate	2	2	0	100%
Tolerable	5	2	3	40%
Trivial	0	0	0	100%

Figure 310: ***click to open property list***

Where the bar chart includes a key, you can tab on the description to remove the details from the chart.

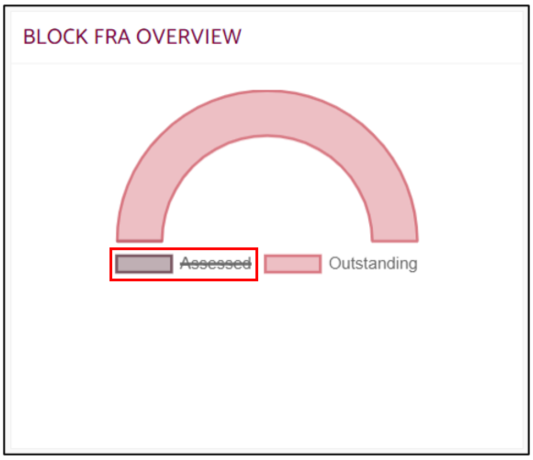


Figure 311: *modify chart display*

Right click in any of the charts and select the relevant option to either save or copy the image.

Figure 312: *save or copy image*

20. Energy Analysis Dashboard

NOTE This dashboard is linked with Lifespan Carbon in Homes and as such is only available to users with a license for this software. In all other cases, the tab will be disabled on your account and you will not have access to the data shown below.

Click on 'Energy Dash' on the menu bar to open the energy analysis dashboard. This tab provides an overview of the energy data stored in Lifespan for all stock, displaying the information under separate categories in chart format.

Figure 313: location of the energy dash module

At the top of the screen you will see two drop-down lists, firstly the ‘Energy Chart profile’ to select the type of charts you want to see and secondly the ‘Energy Data Filter’ to apply a filter to the data being reviewed.

To select a chart profile, click on the drop-down list next to this heading and choose from the list. There is an option to view all charts or standard charts, or to view charts containing statistics for more specific elements of the energy data.

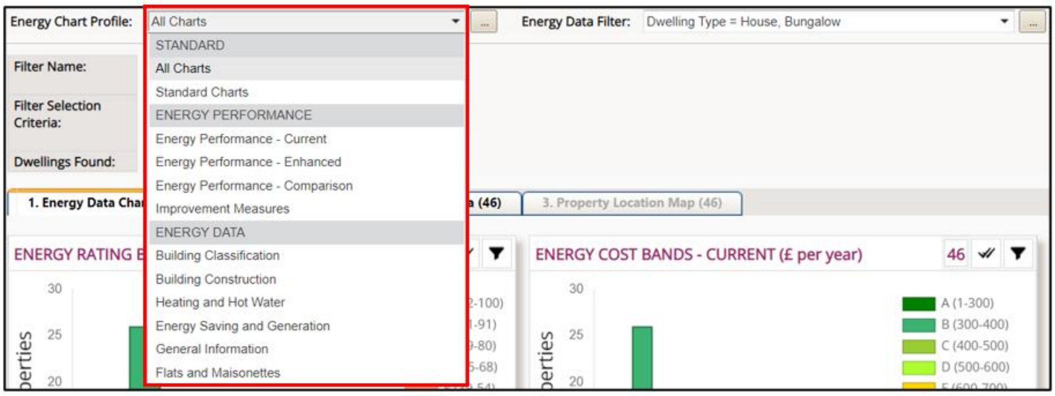


Figure 314: *energy chart profile selection*

The charts will be displayed on the main screen and will include data for all stock until a filter is applied. To select a data filter, click on the drop-down list next to this heading and choose from the list. The charts will automatically update on the main screen to reflect the filters applied.

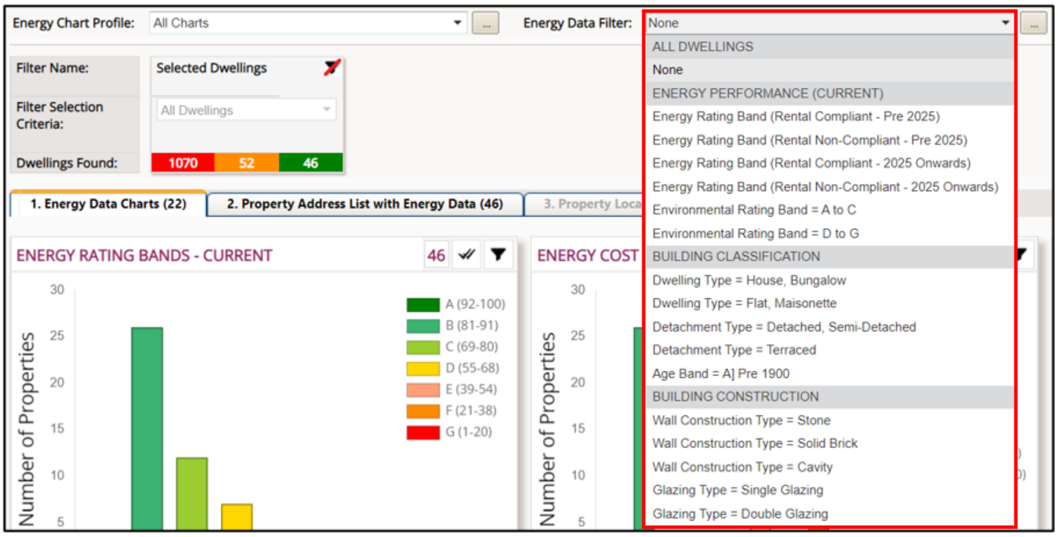


Figure 315: *energy data filter selection*

Just below the chart profile and filter drop-down lists is the energy data filter definitions pane. This area outlines the current filters applied, as well as showing the total number of dwellings found to report on – there are three categories for this, displayed in different colours indicating:

1. Red – Total number of properties found (with or without energy assessments)
2. Orange – Number of dwellings found (with energy assessments)
3. Green – Number of dwellings found (with energy assessments and improvement measures)

NOTE The charts will display information on the total number of dwellings with both energy and improvement measures i.e. any property containing a full energy assessment in Lifespan.

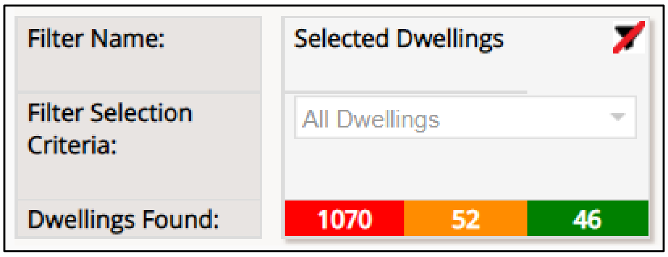


Figure 316: energy data filter definitions

20.1 User Defined Energy Chart Profile

You can add a custom chart profile by clicking on the button to the right of the drop-down list.

Figure 317: create, edit, delete user defined energy chart profiles

Fill out the details as required to set up the chart profile.

1. Energy Chart Profile Name – this free text field allows you to type in a chart description, this name will be added to the main drop-down list once saved so you can use the profile again.

2. Energy Chart Category Name – this field is preset as 'USER DEFINED' which is the category the new profile will appear under in the main drop-down list once saved.

3. Energy Chart Profile List Order – this is the number of where your profile will appear in the main drop-down list. Type in the field or click 'Allocate Next Available Slot' to automatically fill this so your profile appears at the bottom of the list.

4. Select the charts you want to appear in your custom profile by clicking in the tick box next to the relevant chart name. You can then select the order you want the charts to appear in, the type of chart you want to use and the colours you want to be displayed using the pick-list options available.

5. Click 'Save' to save your profile and add to the main drop-down list.

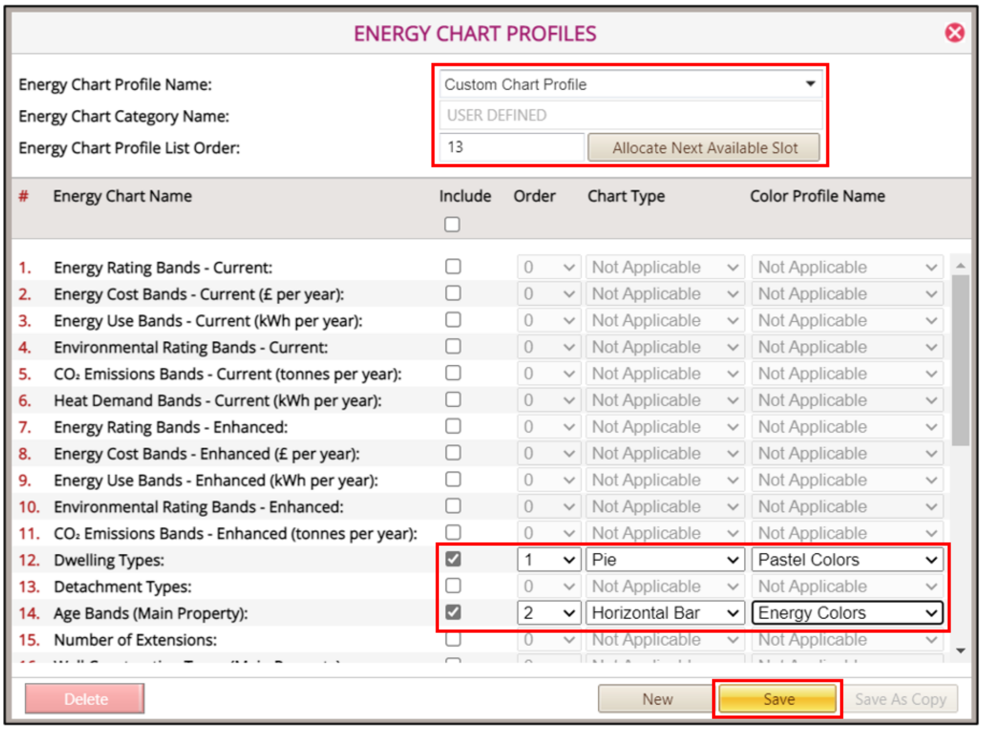


Figure 318: energy chart profiles

To delete a chart profile, open the profiles page by clicking on the button to the right of the drop-down list. Select your profile from the list and click delete. When you return to the energy chart profile list, your user defined profile will no longer be displayed.

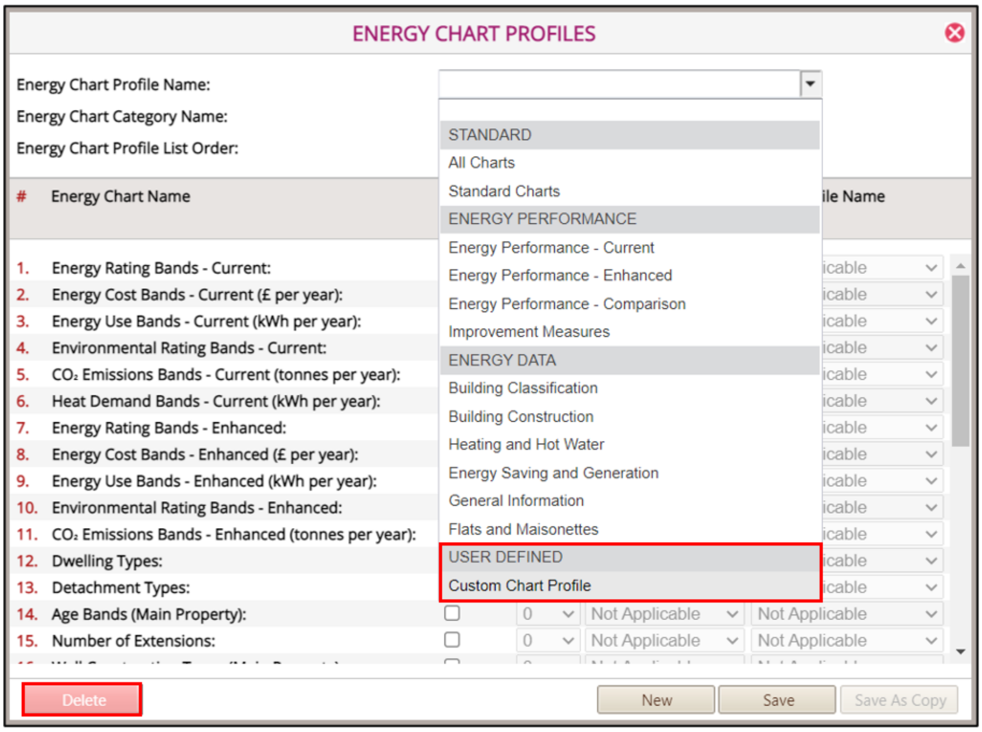


Figure 319: energy chart profile name

20.2 Energy Data Charts

The first tab on the main screen contains all the energy charts, the number of charts displayed being dependent on the profile selected (the total figure is shown in brackets after the tab heading).

Figure 320: energy data charts

Each chart is interactive, hover over the bar to see the total number of associated properties or click on it to either select or unselect.

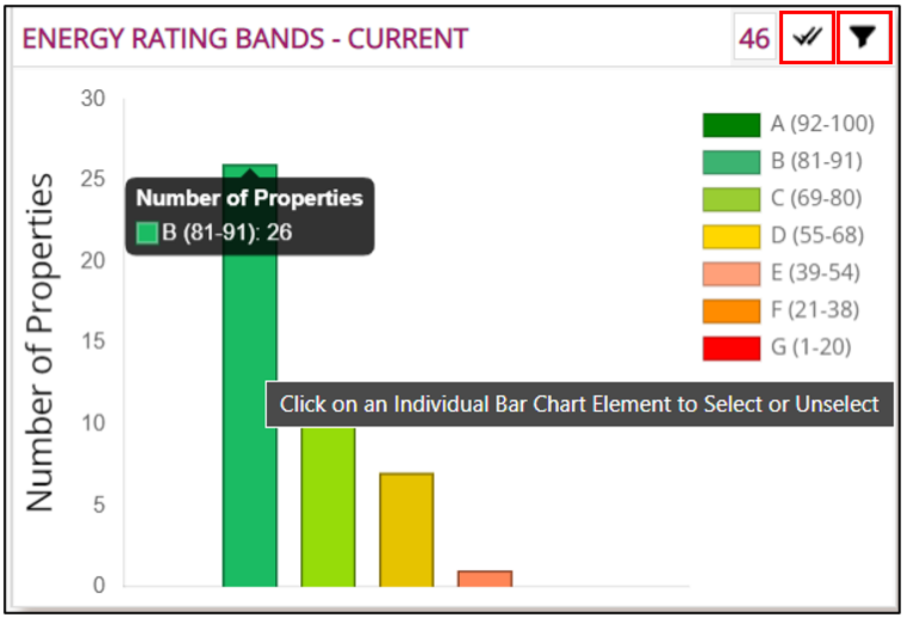


Figure 321: select/deselect and filter buttons

There are two function buttons in the top right of each chart, tap on the ticks symbol to either select or deselect all properties and tap on the filter symbol to apply a filter using the selected bar chart elements. Any deselected elements of the chart will be faded and once the filter button is pressed, your new total will be displayed next to the chart heading.

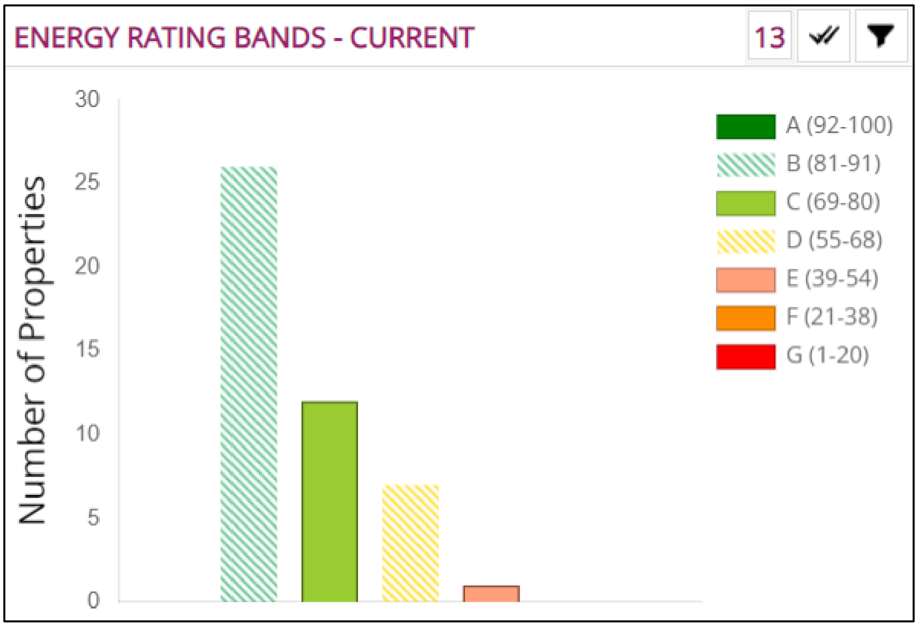
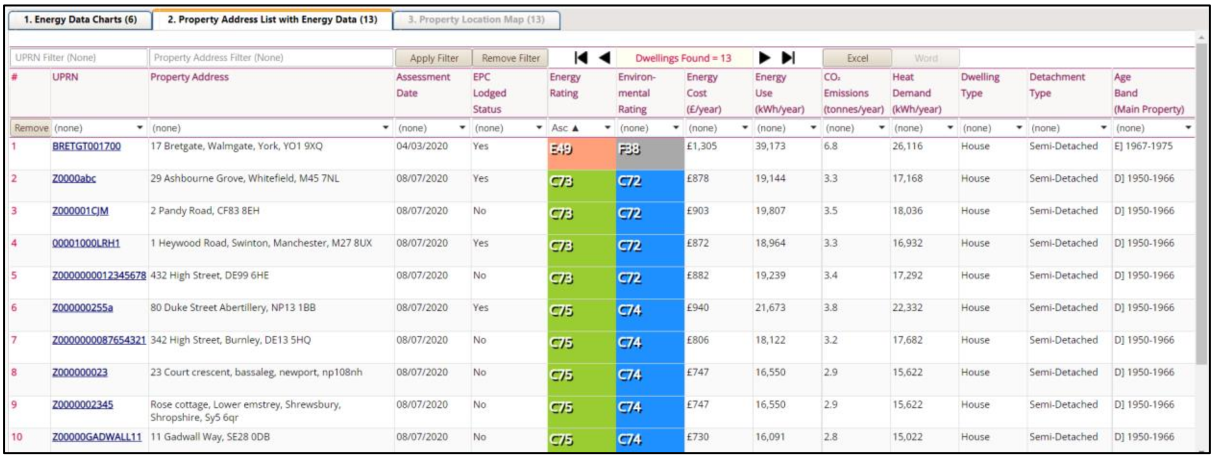


Figure 322: selected/deselected bar chart elements

This filtered dataset can be viewed in the second tab of the dashboard, property address list with energy data.

20.3 Property Address List with Energy Data

The second tab on the main screen contains energy data, listed by property, the number of properties displayed being dependent on the charts selected and filters applied within the energy data charts tab (the total number of properties is shown in brackets after the tab heading).



#	UPRN	Property Address	Assessment Date	EPC Lodged Status	Energy Rating	Environ-mental Rating	Energy Cost (£/year)	Energy Use (kWh/year)	CO_2 Emissions (tonnes/year)	Heat Demand (kWh/year)	Dwelling Type	Detachment Type	Age Band (Main Property)
Remove	(none)	(none)	(none)	(none)	Asc ▲	(none)	(none)	(none)	(none)	(none)	(none)	(none)	(none)
1	BRETGT001700	17 Bretgate, Walmgate, York, YO1 9XQ	04/03/2020	Yes	E49	F38	£1,305	39,173	6.8	26,116	House	Semi-Detached	E] 1967-1975
2	Z0000abc	29 Ashbourne Grove, Whitefield, M45 7NL	08/07/2020	Yes	C73	C72	£878	19,144	3.3	17,168	House	Semi-Detached	D] 1950-1966
3	Z000001CJM	2 Pandy Road, CF83 8EH	08/07/2020	No	C73	C72	£903	19,807	3.5	18,036	House	Semi-Detached	D] 1950-1966
4	00001000LRH1	1 Heywood Road, Swinton, Manchester, M27 8UX	08/07/2020	Yes	C73	C72	£872	18,964	3.3	16,932	House	Semi-Detached	D] 1950-1966
5	Z000000012345678	432 High Street, DE99 6HE	08/07/2020	No	C73	C72	£882	19,239	3.4	17,292	House	Semi-Detached	D] 1950-1966
6	Z000000255a	80 Duke Street Abertillery, NP13 1BB	08/07/2020	Yes	C75	C74	£940	21,673	3.8	22,332	House	Semi-Detached	D] 1950-1966
7	Z000000087654321	342 High Street, Burnley, DE13 5HQ	08/07/2020	No	C75	C74	£806	18,122	3.2	17,682	House	Semi-Detached	D] 1950-1966
8	Z000000023	23 Court crescent, bassaleg, newport, np108nh	08/07/2020	No	C75	C74	£747	16,550	2.9	15,622	House	Semi-Detached	D] 1950-1966
9	Z0000002345	Rose cottage, Lower emstrey, Shrewsbury, Shropshire, Sy5 6qr	08/07/2020	No	C75	C74	£747	16,550	2.9	15,622	House	Semi-Detached	D] 1950-1966
10	Z00000GADWALL11	11 Gadwall Way, SE28 0DB	08/07/2020	No	C75	C74	£730	16,091	2.8	15,022	House	Semi-Detached	D] 1950-1966

Figure 323: property address list with energy data

Each row in the table represents an individual address. There are a number of columns, the data for each being taken from the energy data stored in Lifespan against the selected address.

You can apply an additional filter within this tab, to narrow down further by UPRN or address. For either filter, tap in the box and type in the UPRN/address before clicking ‘Apply Filter’ to update your list. Tap ‘Remove Filter’ to return to your full list.

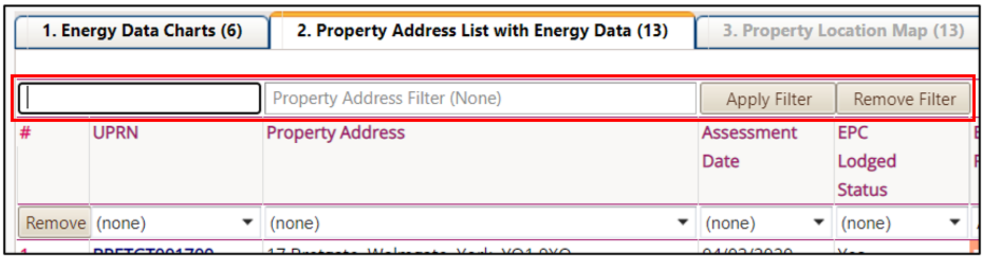


Figure 324: property address list filters

To the right of the filters there are previous/next arrows to search through your property list. There is also a scroll bar to the right of the screen which can be used to navigate on the page.

You can export the data via the excel/word buttons at the top of the screen. Click on the button to view the list of exports available. Click to select the required output and generate the document.

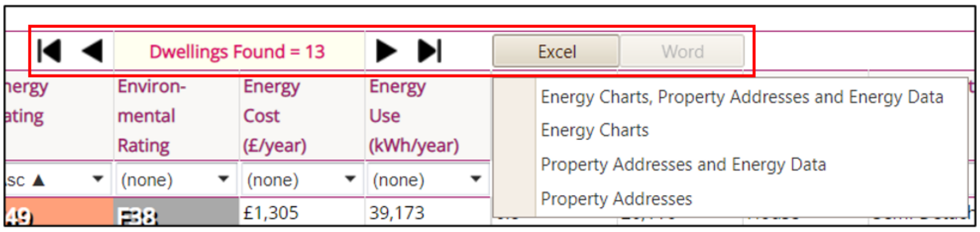


Figure 325: next/previous and export functions

Below each column header you will see a drop-down list which enables you to modify the order your properties are listed in. Tap on the drop down under the relevant heading and select either ascending or descending depending on how you want the data to be displayed. Tap on ‘Remove’ on the left of the screen to revert to the default order.

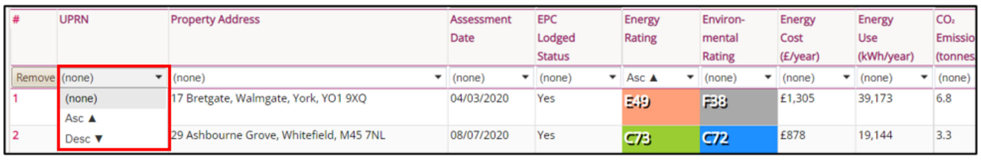
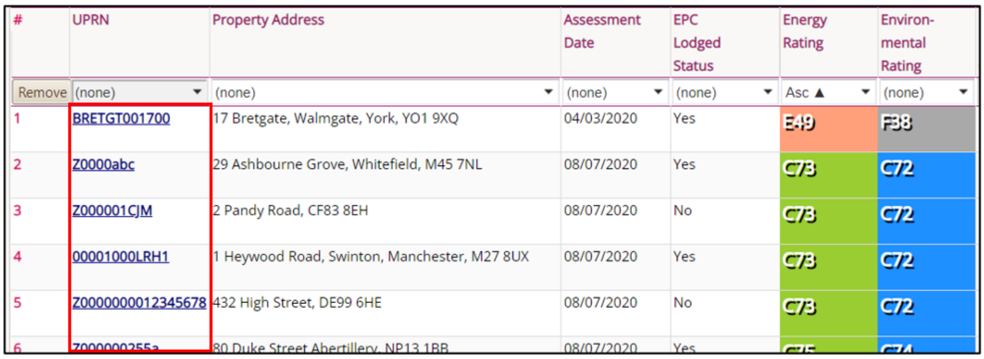


Figure 326: list order

Each column displayed provides details from the energy assessment, however not all fields are captured within the analysis. Click on any of the UPRNs to view or edit the full assessment, you will be taken directly to the RdSAP data. Click ‘Close’ at any time to return to the dashboard.



#	UPRN	Property Address	Assessment Date	EPC Lodged Status	Energy Rating	Environ-mental Rating
Remove	(none)	(none)	(none)	(none)	Asc ▲	(none)
1	BRETGT001700	17 Bretgate, Walmgate, York, YO1 9XQ	04/03/2020	Yes	E49	F38
2	Z0000abc	29 Ashbourne Grove, Whitefield, M45 7NL	08/07/2020	Yes	C73	C72
3	Z000001CJM	2 Pandy Road, CF83 8EH	08/07/2020	No	C73	C72
4	00001000LRH1	1 Heywood Road, Swinton, Manchester, M27 8UX	08/07/2020	Yes	C73	C72
5	Z000000012345678	432 High Street, DE99 6HE	08/07/2020	No	C73	C72
6	Z000000255a	80 Duke Street Abertillery, NP13 1BB	08/07/2020	Yes	[illegible]	[illegible]

Figure 327: view or edit the selected energy assessment

20.4 Settings

The energy dashboard settings are available via the main screen, on the energy data charts tab. Tap on the cog symbol in the top right of the page to open the settings.

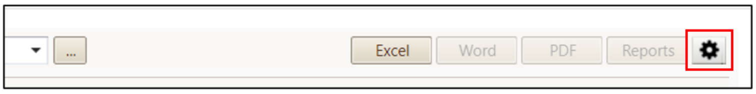


Figure 328: settings

You can configure specific elements within the dashboard relating to the energy version, data filtering, data charts and property address list.

Amend the applicable drop down lists or tick boxes to make your adjustments or click 'Restore Default settings' to remove the custom changes and revert to default.

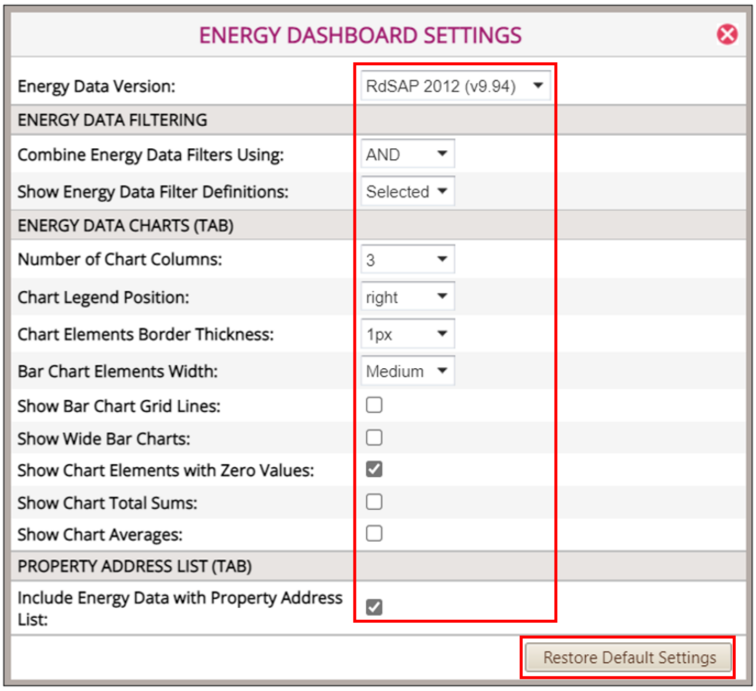


Figure 329: *energy dashboard settings*

21. Calendar

Click on ‘Calendar’ on the menu bar. The calendar contains an overview of any upcoming tasks or risk assessments. Like the notifications tab, it is fully integrated with the other modules.

Figure 330: *location of the calendar module*

1. By default, the calendar module will display the current Month. This can be updated by selecting from the calendar view to the left of the screen, you can also switch the view to show by either Day, Week or Month in the top right of the screen.

2. All tasks are displayed within the chosen view, a brief description is highlighted in the corresponding day, double click to open the task, edit or mark as complete.

3. A filter option is available in the bottom left of the screen. Select to filter either by property or task type.

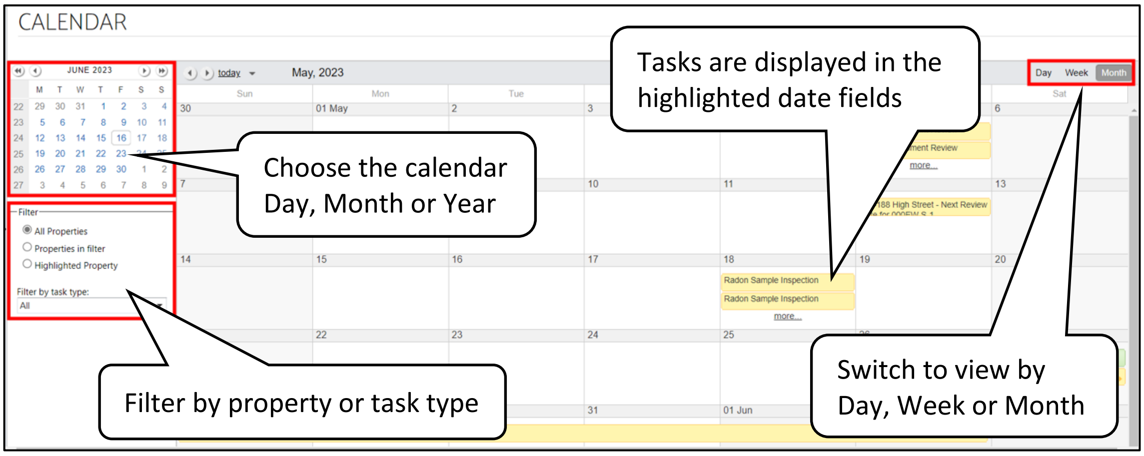


Figure 331: calendar page

21.1 Adding a Task

1. To add a new task, click ‘New’ from the menu bar.

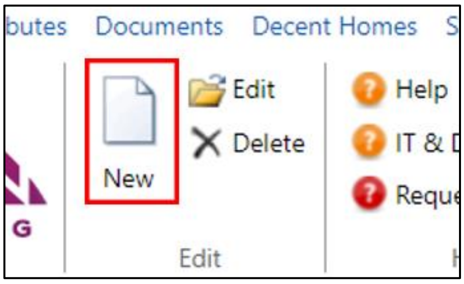


Figure 332: location of the new task button

2. Fill in the details on the popup box and click ‘Save’.
   - ‘Name’ and ‘Description’ are free text fields.
   - You can choose either ‘FRA’, ‘Asbestos’ or ‘Water’ if applicable to one of these modules, or ‘None’ can be used for general tasks.
   - By default, the start date will display todays date and time, this can be manually overwritten or an alternative date/time selected by using the calendar and clock pop-ups to the right of the field. Amend the ‘End Date’ in the same way.
   - The ‘Completed’ tick box should be used if the task is finished, leave unticked for an outstanding task.

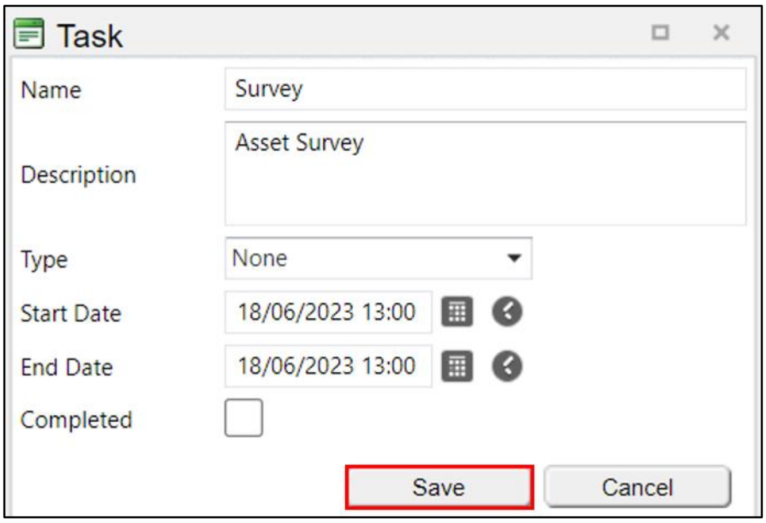


Figure 333: adding a new task

21.2 Editing a Task

1. Select the task to edit from the calendar and click ‘Edit’ or alternatively double-click on the task.

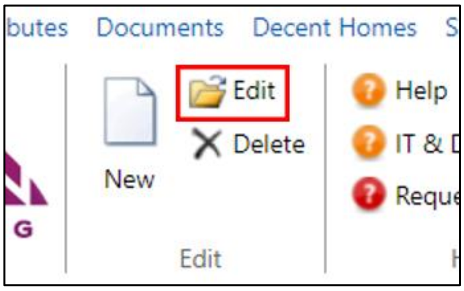


Figure 334: location of the edit task button

2. Update the details and click 'Save'.

21.3 Deleting a Task

1. Select the task you want to remove from the calendar and click 'Delete'.

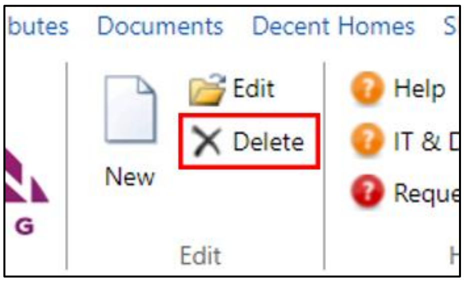


Figure 335*: location of the delete task button*

2. Complete by clicking 'Remove'.

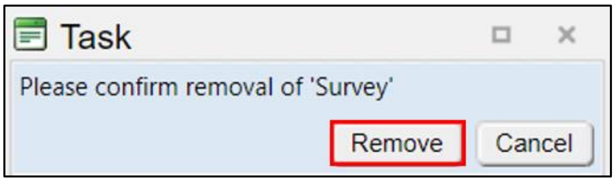


Figure 336: confirm the removal

21.4 Marking a Task as Complete

1. Select the task from the calendar and click 'Edit' or alternatively double-click on the task.

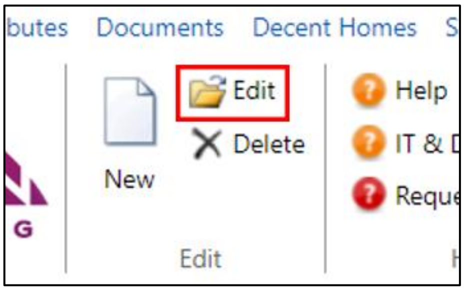


Figure 337: location of the edit task button

2. Check the box 'Completed' and click 'Save'.

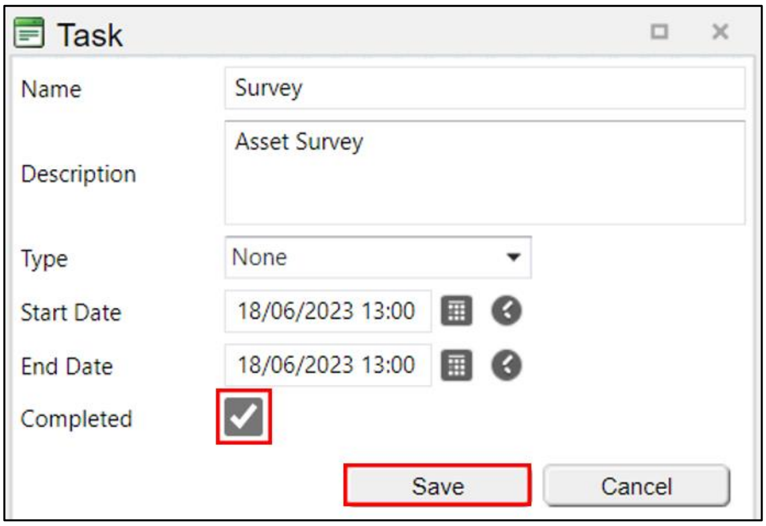


Figure 338: marking a task as completed

21.5 Linking Tasks to Fire, Asbestos or Water Risk Assessments

Tasks can be linked to fire, asbestos or water risk assessments either when adding a new or editing an existing task.

1. Choose a value from the 'Type' drop down to link to either the fire, asbestos or water risk assessment for the selected property.

2. Click 'Save' to confirm.

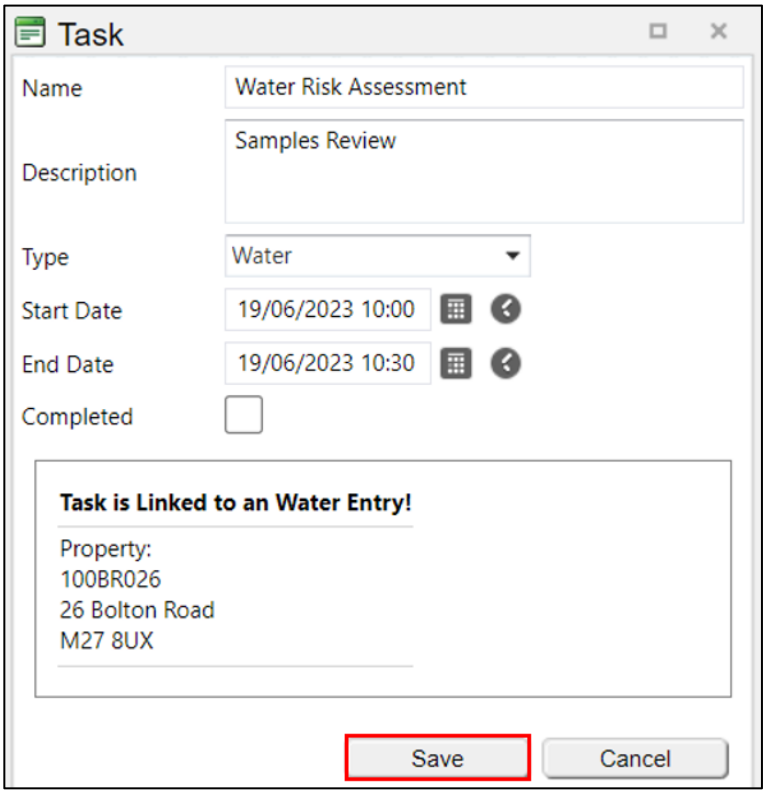


Figure 339: linking a task to a water risk assessment

22. Notifications

Click on ‘Notifications’ on the menu bar, or alternatively use the ‘Click here to view all notifications’ link that appears when you first log in to Lifespan. The notifications page displays information on outstanding tasks and works in widget form. For more information on how to use widgets, please refer to section **4. The Summary Screen.**

Figure 340: location of the notifications tab

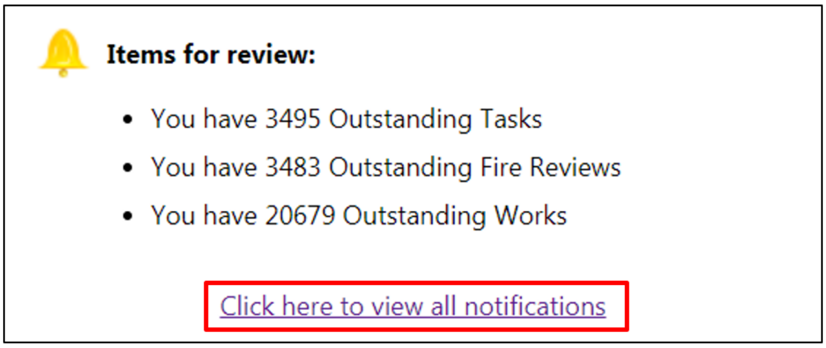


Figure 341: alternative to using the notifications tab

1. Click on any of the blue links to download an Excel spreadsheet containing that information.

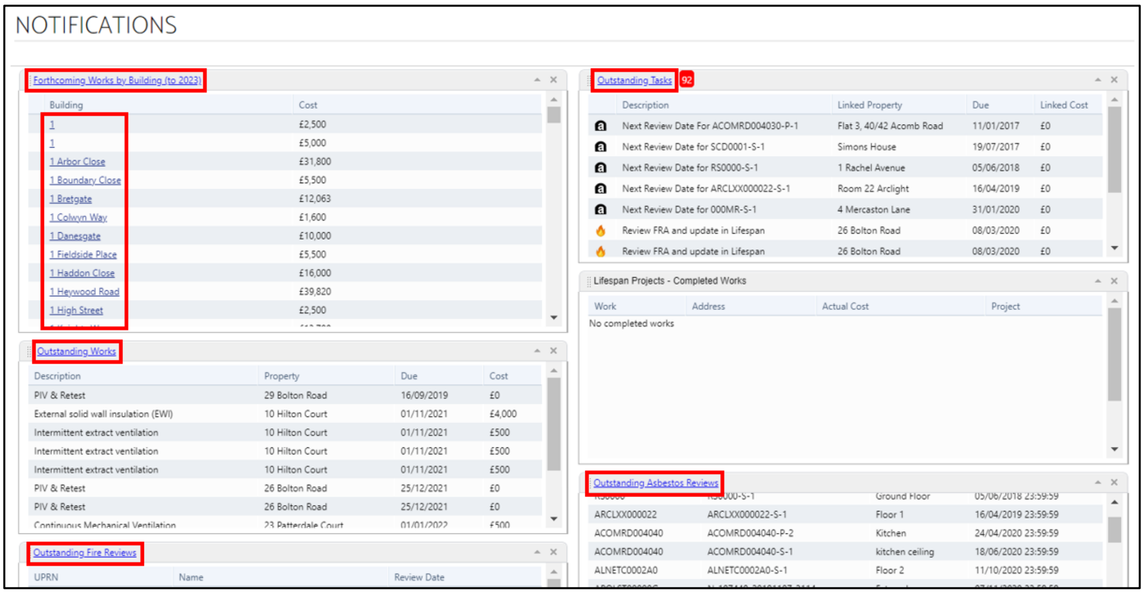


Figure 342: notifications page

23. Reporting, Auditing and Modelling

In the property summary module, you will see a section on reports.

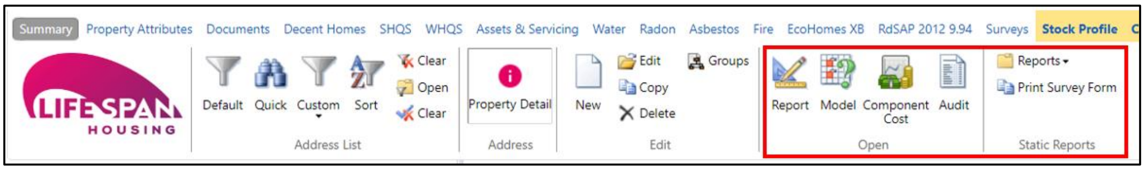


Figure 343: location of the reports section

23.1 Static Reports

Static reports are set reports which can be easily generated at the click of a button, for either individual or multiple properties. The reports contain pre-determined datasets so cannot be modified other than choosing what properties you want to extract the information from.

1. From the address list, select which properties you would like to be included. For a single address, highlight the property or for multiple addresses use the tick box to the left of each relevant property.

2. Click on the ‘Reports’ button under ‘Static Reports’ and choose the report you wish to generate from the drop-down list.

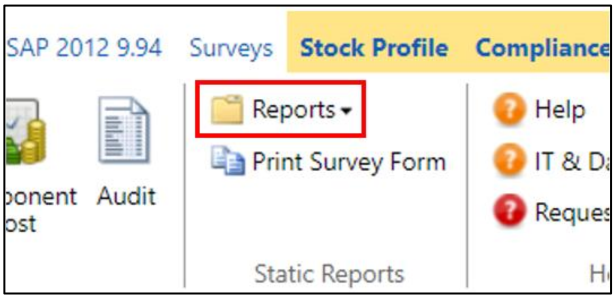


Figure 344: location of the static reports button

3. Select the suitable file type and click 'Generate', either for the current property or multiple selected.

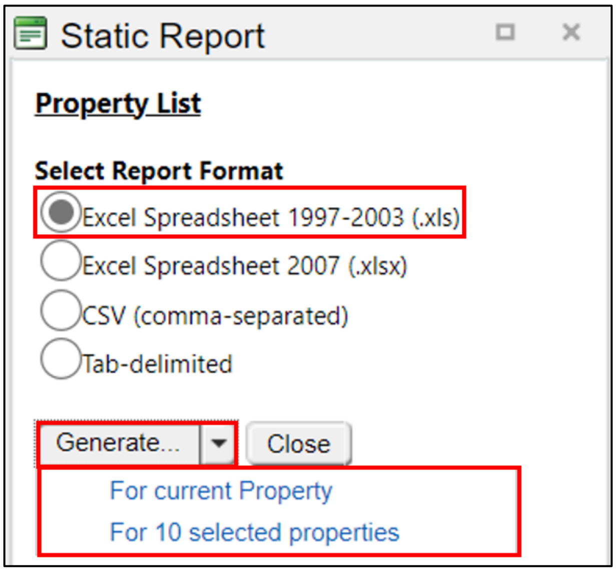


Figure 345: generating the report

23.1.1 Module Specific Reports

In addition to the reports available through the list outlined in section **23.1 Static Reports** there are also some instances where reports can be generated directly within the module itself. These are also static reports, meaning the dataset is pre-determined so you are just extracting the information for the chosen address(es).

Fire

1. To download a copy of the latest fire risk assessment for an address, select the property and navigate to the 'Fire' Module.

2. Under the 'Reports' heading, click the link to download the latest fire risk assessment. This will generate a PDF copy of the fire risk assessment.

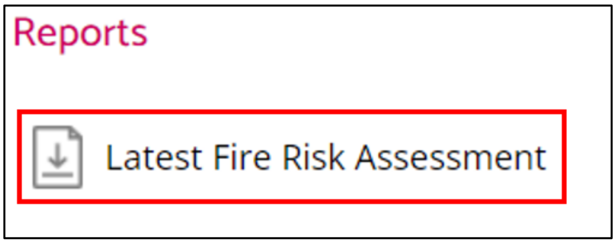


Figure 346: fire reports

Retrofit Assessment

1. To download a copy of the retrofit assessment for an address, select the property and navigate to the 'Property Attributes' module.

2. Click on the 'Retrofit Assessment' tab, followed by the 'Reports' button.

Figure 347: retrofit assessment reports

3. In the 'Reports' window, select 'Retrofit Assessment' from the survey/report drop-down list. This will automatically update the template type to 'Dynamic Report'.

4. Select whether you want to download the report for just the highlighted property or the ticked properties within the current filter (you will have to make sure you have a filter applied with all applicable addresses ticked to use this second option effectively).

5. Select a report format, you can choose from either word or PDF.

6. Click 'Export' to download a copy of the survey report for your selected address/es.

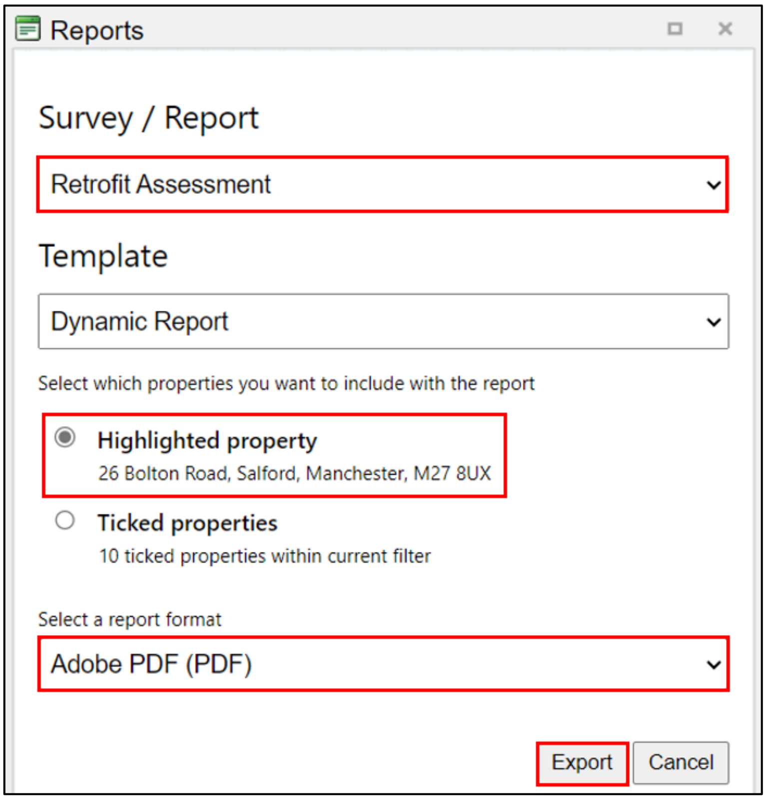


Figure 348: report export

You can also access the retrofit assessment report through the 'Surveys' module.

1. Highlight an address or select multiple addresses, then navigate to the 'Surveys' module.

2. Click on the 'Reports' button within the reports section on the menu bar.

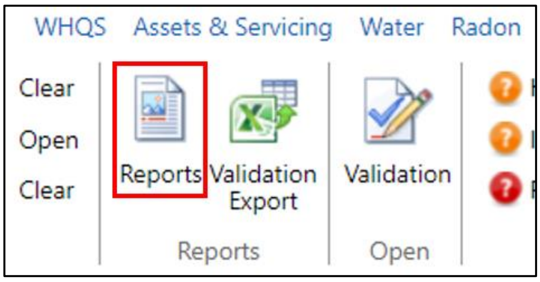


Figure 349: reports button

3. Follow steps 3-6 as above to export a copy of the survey report for your selected address(es).

NOTE Static reports always extract the current data from Lifespan. Any reports exported after the assessments are updated will reflect the most recent changes.

RdSAP

There are a number of report outputs available for the energy and occupancy assessment data collected for a property.

1. To access the information for an address, select the property and navigate to the relevant 'RdSAP' module.

2. Under the 'Reports & Outputs' heading, click on the 'Outputs' button.

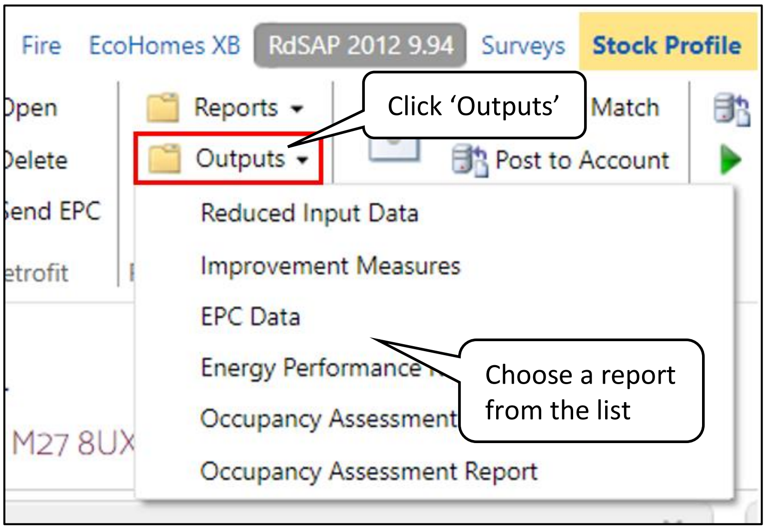


Figure 350: RdSAP outputs

3. The drop-down will display the full list of report options, click on the heading to generate the PDF download for the information selected.

NOTE You will need to ensure the RdSAP and occupancy assessments have been calculated in order for some of the exports to be enabled. The report heading will be greyed out until the information is available.

23.2 Custom Reports

The report wizard allows you to create a custom report to include any data stored within Lifespan from across multiple modules.

1. From the 'Summary' module, click on the 'Report' button under the 'Open' section.

Figure 351: location of the custom report button

The custom report wizard will open in a new window, allowing you to return to Lifespan at any point without having to close the reporting area.

Like with all modules within Lifespan, the ribbon pane contains all the relevant function buttons allowing you to carry out the necessary actions.

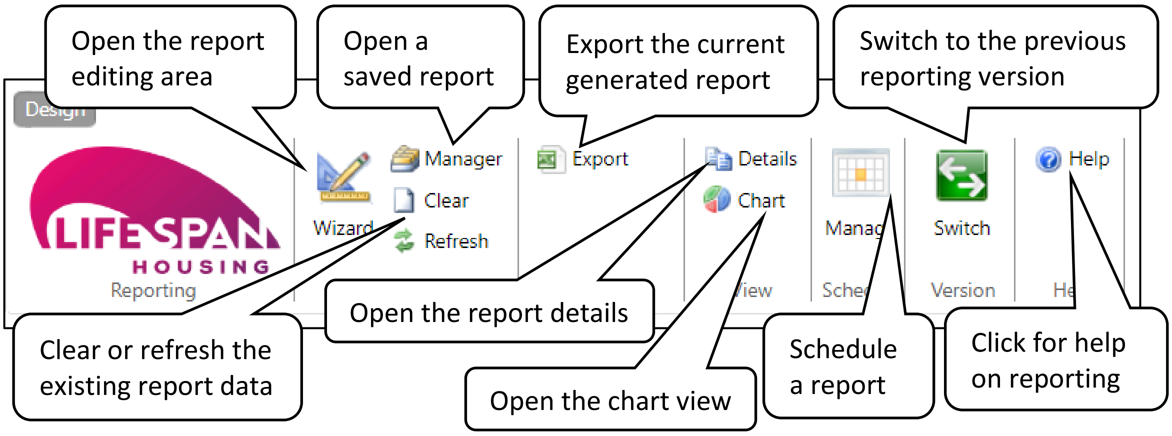


Figure 352: report wizard ribbon pane

23.2.1 Creating a new custom report

1. To create a new report, click 'Wizard' within the 'Report' section of the ribbon pane.

Figure 353: location of the report wizard button

2. Select a 'Report Template' from the drop-down list.

   When creating a new report, you will need to choose a template from the available options. Each template includes some default columns for specific data sets. The templates can be used as they are, or as a base to build up a more complex report.

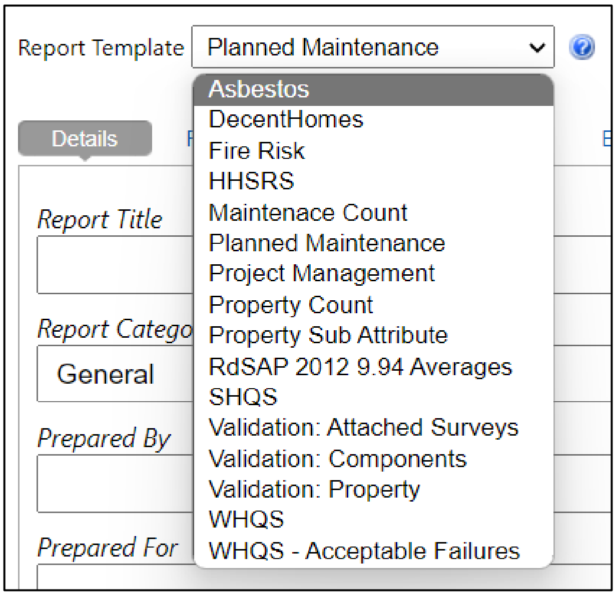


Figure 354: report templates

Once a template has been selected, you can start to build your report by working along each of the tabs listed. These will vary depending on which template is selected, however the layout and way of compiling the report stays the same.

Details
This section is not mandatory, however is required if you plan to save the report for future use, so you can search using the criteria entered. Some of this information will also be included on the exported report so is useful to include for reference purposes.

3. Update the 'Details' section as required using the free text fields. The 'Created On' and 'Last Revised On' fields update automatically, however you can amend these if needed by clicking on the date and either manually typing or selecting a date from the pop-up calendar.

4. The 'Purpose' field is free text and enables you to add in a bit more information as to what the report is for. This can be useful when creating a report on behalf of someone else or if referring back to a previously saved report.

5. The 'Is Report Private' tick box at the bottom of the screen will restrict access of the report to just your account. Leave unticked if you want other users to have access to the report.

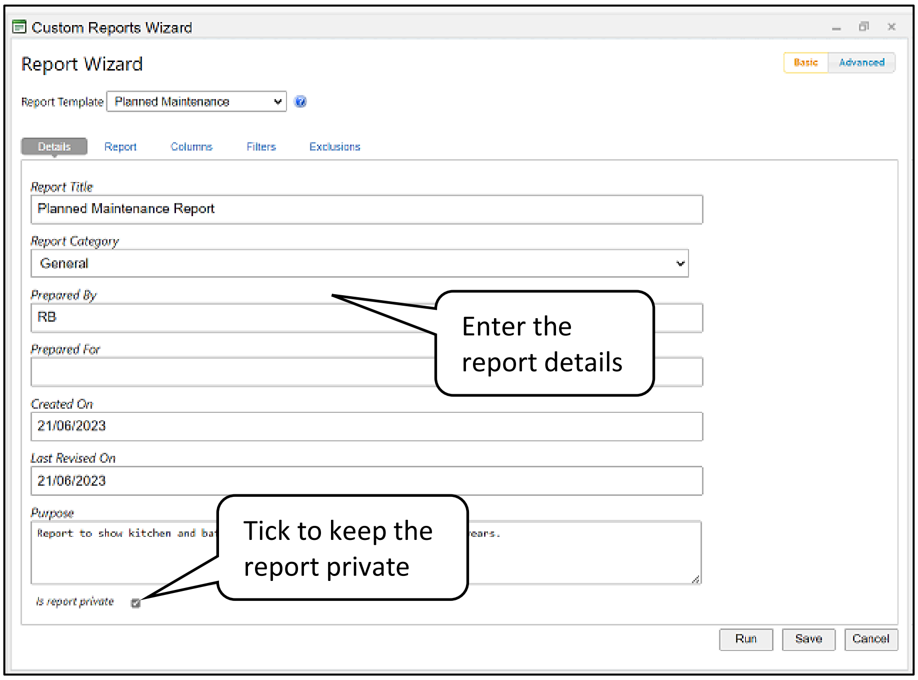


Figure 355: details

Report
This tab is only available within specific templates and is used to include further categories/works/timeframes/criteria depending on which template is chosen.

e.g. Using the planned maintenance report, you can select the date range (30 years is the standard default) along with the choice of including overdue works and to see outstanding, completed or all works by using the drop-down lists provided.

6. Populate the report information by selecting the applicable values from the drop-down list.

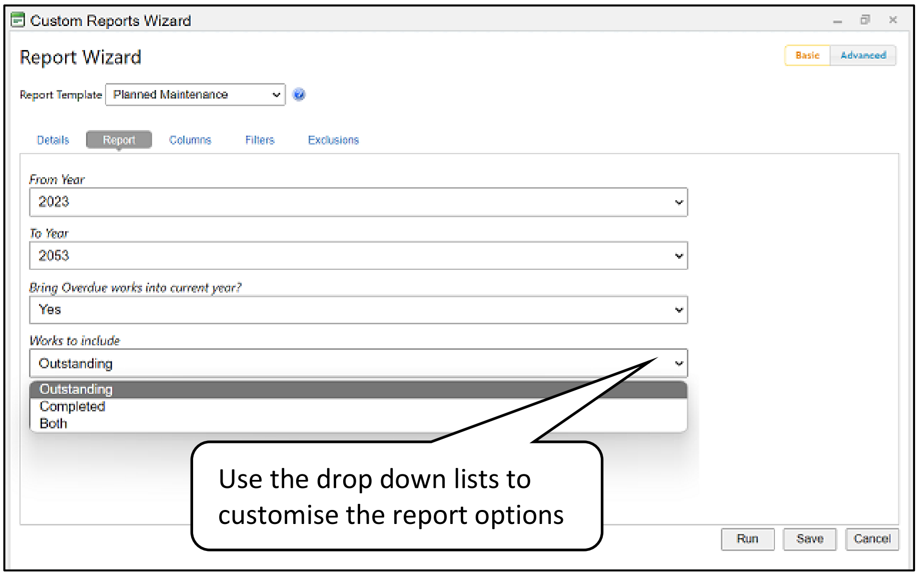


Figure 356: report

Columns

The columns tab is where you define the data you want to include in the report, this is in addition to any of the default information that will be provided from the chosen template.

7. Choose from the drop-down list on the left to select a category. All associated data fields are listed beneath enabling you to select the ones you want to include in the report.

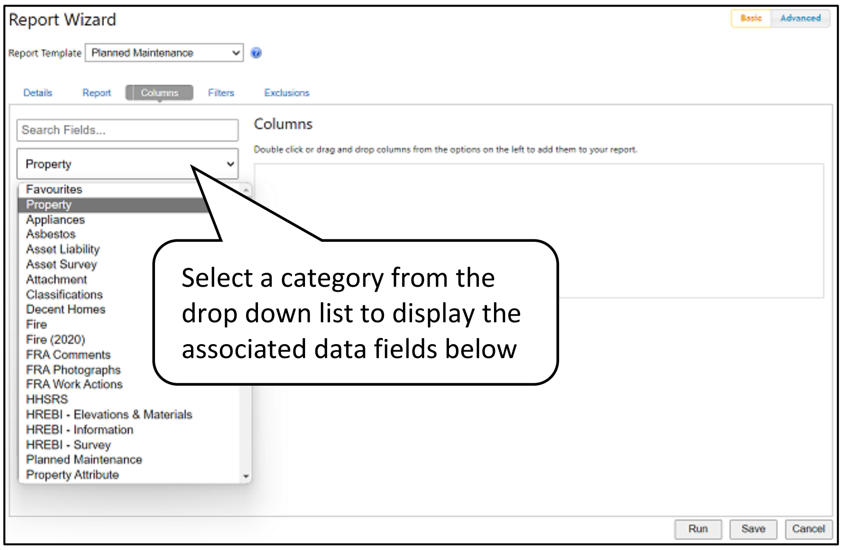


Figure 357: select a category

8. You can add as many columns as are needed into your report and choose from any combination of drop down categories. Once you have selected a category, either drag across or double click on the fields to add in the columns. Each column header selected in this tab will appear in your report in the order that it is shown on screen – click and drag a column header to reorder the display where needed.

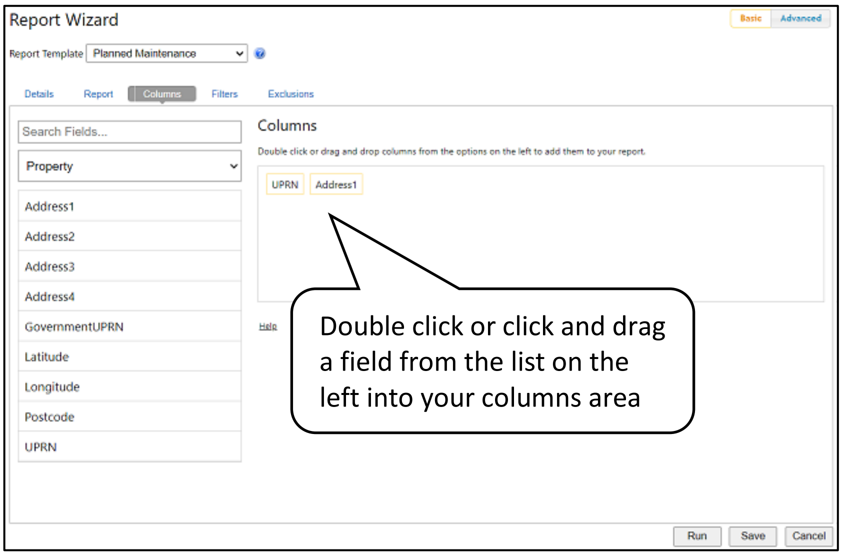


Figure 358: columns

Filters
You can apply a number of filters to your report to narrow down your dataset. You can use quick filters similar to those used in Lifespan Housing (Please see section **3.1 Quick Filters** for more information), apply the current filter from Lifespan Housing or filter on specific criteria/components.

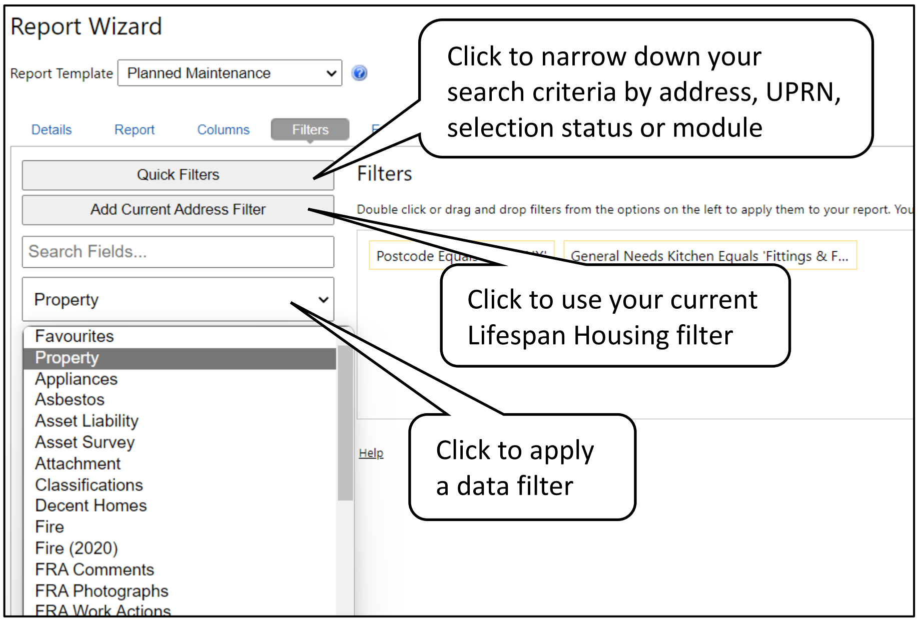


Figure 359: Filters

9. Apply one or more filters to your report using the methods below.

- <u>Quick Filters</u>
  The quick filters in the reports wizard have the same options as some of those used within Lifespan Housing, please refer to section **3.1 Quick Filters** for guidance on using this type of filter.

- <u>Current Address Filter</u>
  The 'Add Current Address Filter' allows you to apply the same filter to your report as the one currently being used within Lifespan Housing. This option will be greyed out if no filter has been applied to your address list in Lifespan Housing.

- <u>Data Filters</u>
  Filters can also be applied based on the same categories and data fields as used in the columns tab which enables you to filter on a specific criteria or component. Select the field from the list and drag or double click to include in the report. A dialog box will appear as below, use the drop down lists to choose how you want to filter i.e. Is Equal To/Is One Of/Contains and what you want to filter on i.e. the chosen component. Click apply to add the filter.

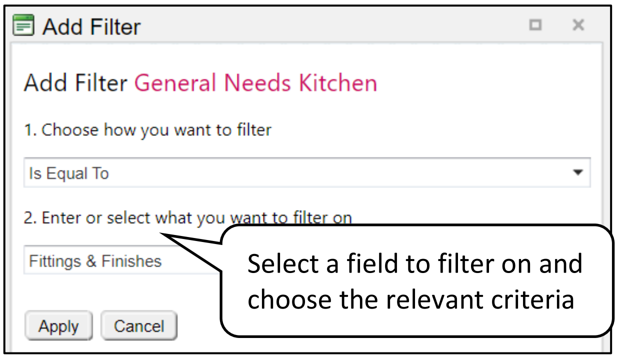


Figure 360: add filter

- <u>Advanced Filters</u>
  Multiple filters can be added to your report by repeating the step above, however you can also add in scenarios via the 'Add, Or, (,)' buttons to build up your filter and narrow down the amount of data in your final report. Click 'Advanced' in the top right of the screen to enable these buttons in the filters tab, then click and drag to where you want to apply them.

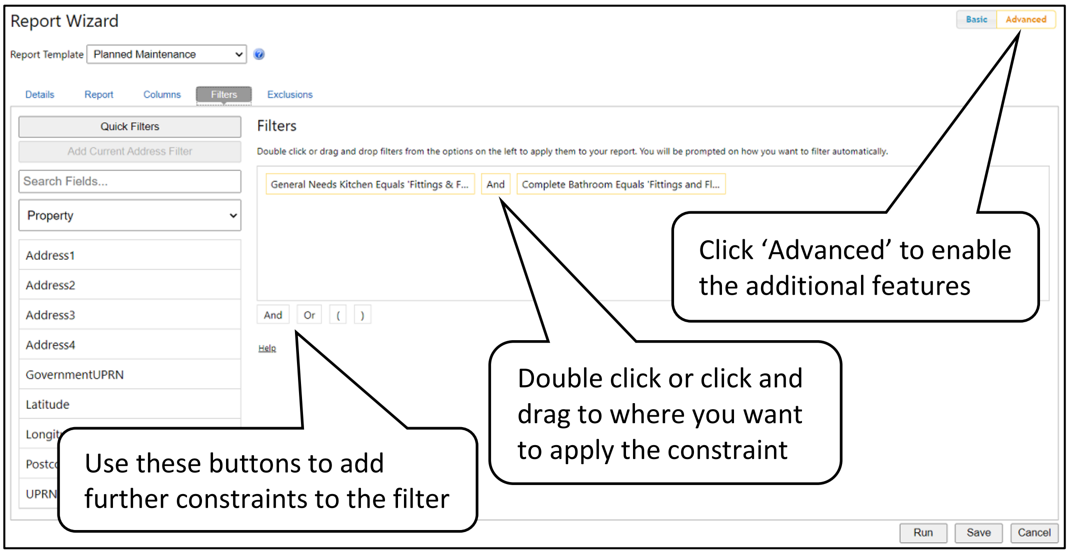


Figure 361: filter buttons

Exclusions – Similar to the exclusions set in Lifespan Housing, here you can choose to include/exclude specific asset, survey or property types within your report.

By default, all asset and survey types are included and all sold, demolished etc. properties are excluded. To change this, use the drop downs to expand each list and untick the required asset, survey or property type.

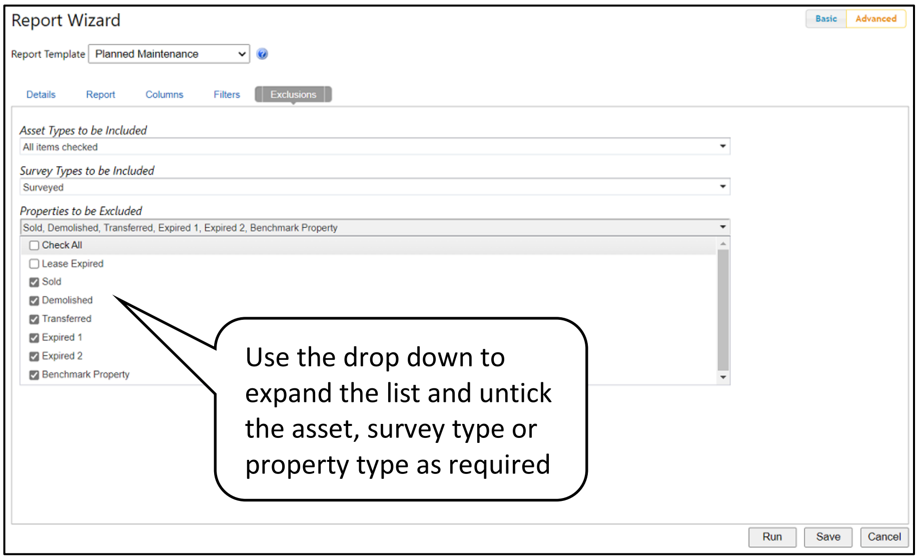


Figure 362: exclusions

10. Once you are happy with all options selected, click 'Run' to run the report. Click 'Save' to run the report and save for future use.

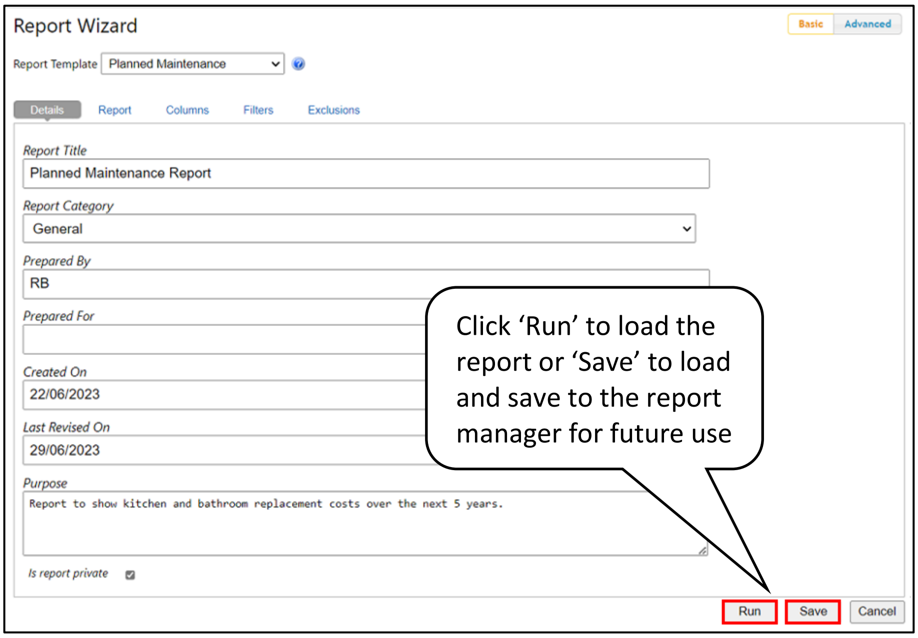


Figure 363: completing the report

23.2.2 Export report data

Once your report data has loaded, you can review the details on screen using the navigation buttons and page options at the bottom of the screen to view the information. Alternatively, you can export the data which allows you to review and investigate the data further in excel format.

1. Click 'Export' from the ribbon bar to extract the current report data in excel format.

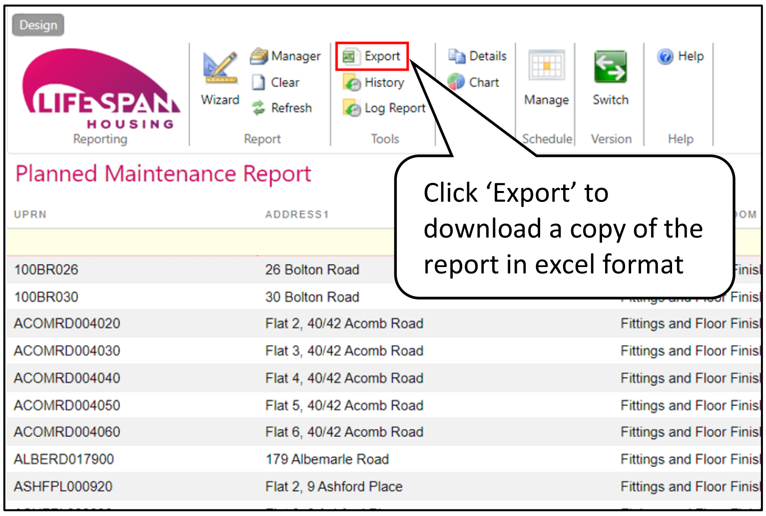
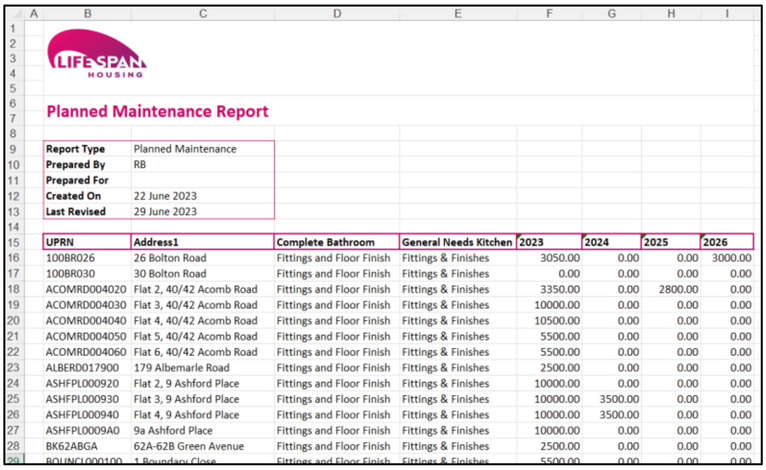


Figure 364: export

2. The downloaded file will be generated, open to review the data. The spreadsheet will contain all columns outlined in the reports wizard, at the top of the sheet you will see the report title followed by the details (where these have been defined in Lifespan).



UPRN	Address1	Complete Bathroom	General Needs Kitchen	2023	2024	2025	2026
100BR026	26 Bolton Road	Fittings and Floor Finish	Fittings & Finishes	3050.00	0.00	0.00	3000.00
100BR030	30 Bolton Road	Fittings and Floor Finish	Fittings & Finishes	0.00	0.00	0.00	0.00
ACOMRD004020	Flat 2, 40/42 Acomb Road	Fittings and Floor Finish	Fittings & Finishes	3350.00	0.00	2800.00	0.00
ACOMRD004030	Flat 3, 40/42 Acomb Road	Fittings and Floor Finish	Fittings & Finishes	10000.00	0.00	0.00	0.00
ACOMRD004040	Flat 4, 40/42 Acomb Road	Fittings and Floor Finish	Fittings & Finishes	10500.00	0.00	0.00	0.00
ACOMRD004050	Flat 5, 40/42 Acomb Road	Fittings and Floor Finish	Fittings & Finishes	5500.00	0.00	0.00	0.00
ACOMRD004060	Flat 6, 40/42 Acomb Road	Fittings and Floor Finish	Fittings & Finishes	5500.00	0.00	0.00	0.00
ALBERD017900	179 Albemarle Road	Fittings and Floor Finish	Fittings & Finishes	2500.00	0.00	0.00	0.00
ASHFPL000920	Flat 2, 9 Ashford Place	Fittings and Floor Finish	Fittings & Finishes	10000.00	0.00	0.00	0.00
ASHFPL000930	Flat 3, 9 Ashford Place	Fittings and Floor Finish	Fittings & Finishes	10000.00	3500.00	0.00	0.00
ASHFPL000940	Flat 4, 9 Ashford Place	Fittings and Floor Finish	Fittings & Finishes	10000.00	3500.00	0.00	0.00
ASHFPL0009A0	9a Ashford Place	Fittings and Floor Finish	Fittings & Finishes	10000.00	0.00	0.00	0.00
BK62ABGA	62A-62B Green Avenue	Fittings and Floor Finish	Fittings & Finishes	2500.00	0.00	0.00	0.00

Figure 365: report excel output

As well as being able to export data to excel in a tabular form, it is also possible to export data as a chart for some reports.

3. Load a report and select 'Chart' from the ribbon pane.

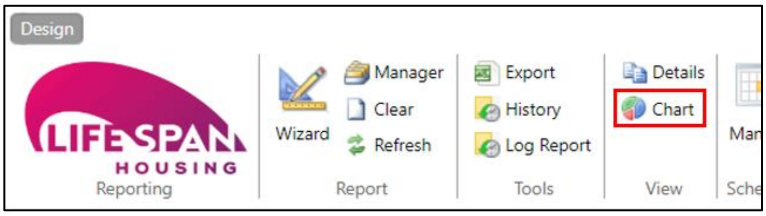


Figure 366: chart tool button

The exporting of data as charts is limited by the effective number of fields in the ‘X’ and ‘Y’ column that can be displayed. Where it is possible the system will offer a variety of charts that are available in the chart export tool under the Chart type drop down.

4. Select a chart type from the drop down list and click ‘Export’ to download. There are a variety of options including column, bar, pie, doughnut, line and radar.

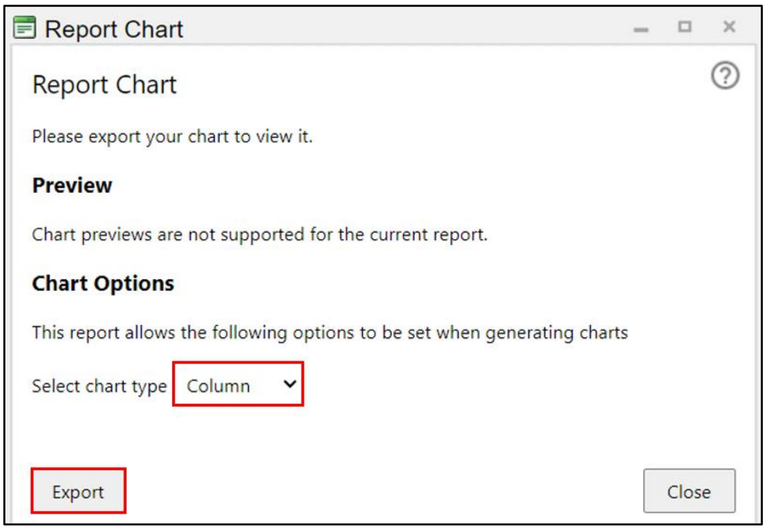


Figure 367: Report type options

The chart will download as a picture within an excel document, allowing you to copy or save.

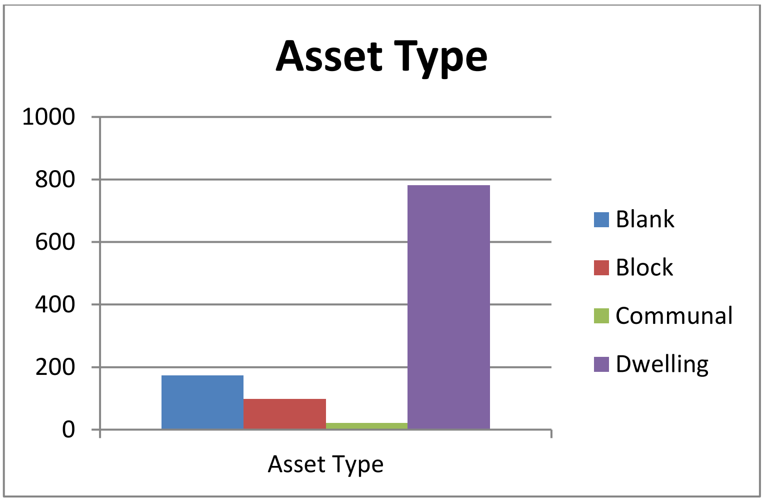


Figure 368: example column chart

5. If your report is too complex you may be unable to download in chart format. If this is the case, you will see the following message when you click on the ‘Chart’ button and will be unable to use this feature without amending your report. Click ‘Close’ to return to the reporting area.

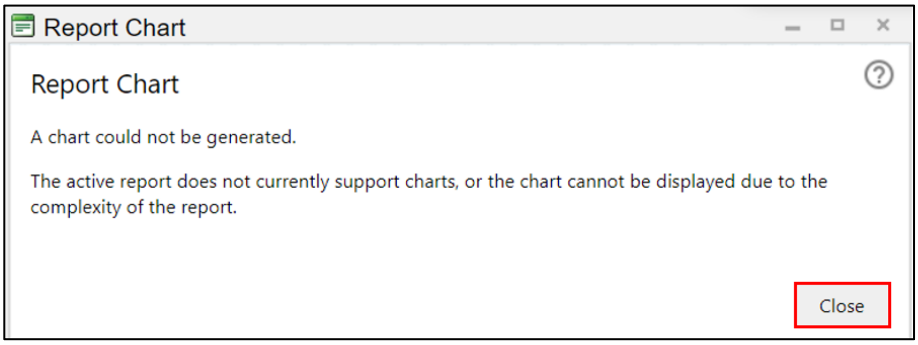


Figure 369: report chart message

23.2.3 Open a Saved Report

1. To retrieve a saved report, click on 'Manager'.

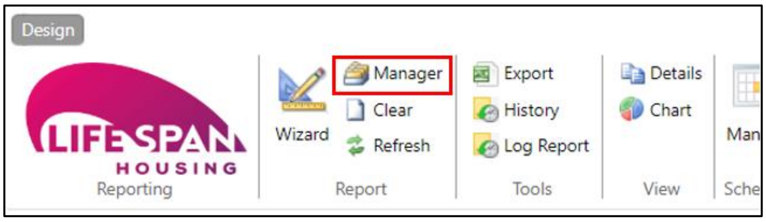


Figure 370: location of the manager button

The 'Report Manager' contains a full list of all saved reports. From here you can select any report from the list and carry out the following actions.

- Load: to load the report information into the wizard to enable any changes to be made before reviewing the data.
- Run: use the existing criteria and run the selected report. The information will also be loaded to the wizard so you can edit the report as required.
- Cancel: to close the report manager and return to the main screen.
- Clone: to create a copy of the selected report, this will allow you to use an existing report as a template to build on rather than creating an entirely new report.
- Delete: to remove the selected report from the manager.

NOTE Any changes made to the reports will apply to every user that has access to the report and cannot be reverted. i.e., if you delete a report from the list, all users will no longer be able to access it again, it would have to be recreated using the report wizard.

2. Scroll through the list of reports or search using the free-text fields at the top of the screen. Select a report by clicking on the applicable row and choose one of the options to either edit, view, copy or remove the information.

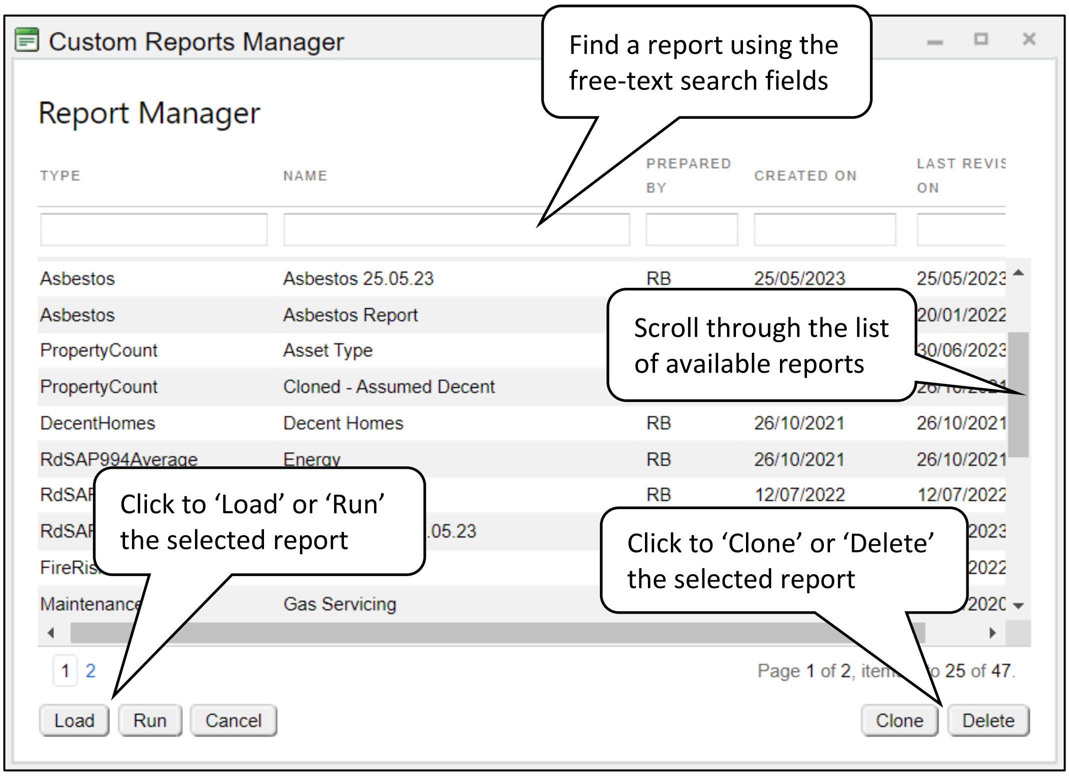


Figure 371: report manager

23.2.4 Schedule a Report

You can schedule any saved report to run at regular intervals and automatically deliver the report data to a single email or multiple email addresses.

1. Click 'Manage' from the Report Wizard ribbon bar.

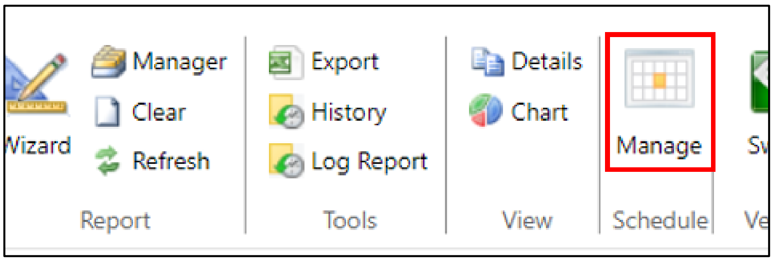


Figure 372: location of the manage button

2. The 'Report Schedule' will open to display all existing scheduled reports, click 'Schedule New Report' to create a new schedule.

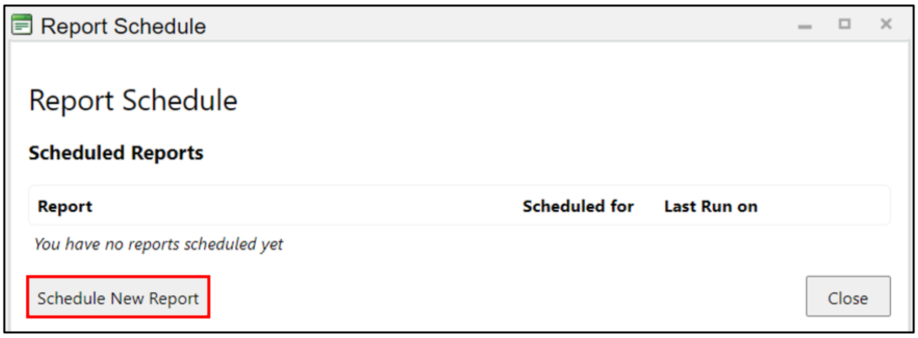


Figure 373: report schedule

3. Select a report from the drop-down list. The report type, purpose and prepared by/for details will be pre-populated if these were defined within the report.
   Set the schedule by selecting either Weekly, Fortnightly or Monthly from the list.

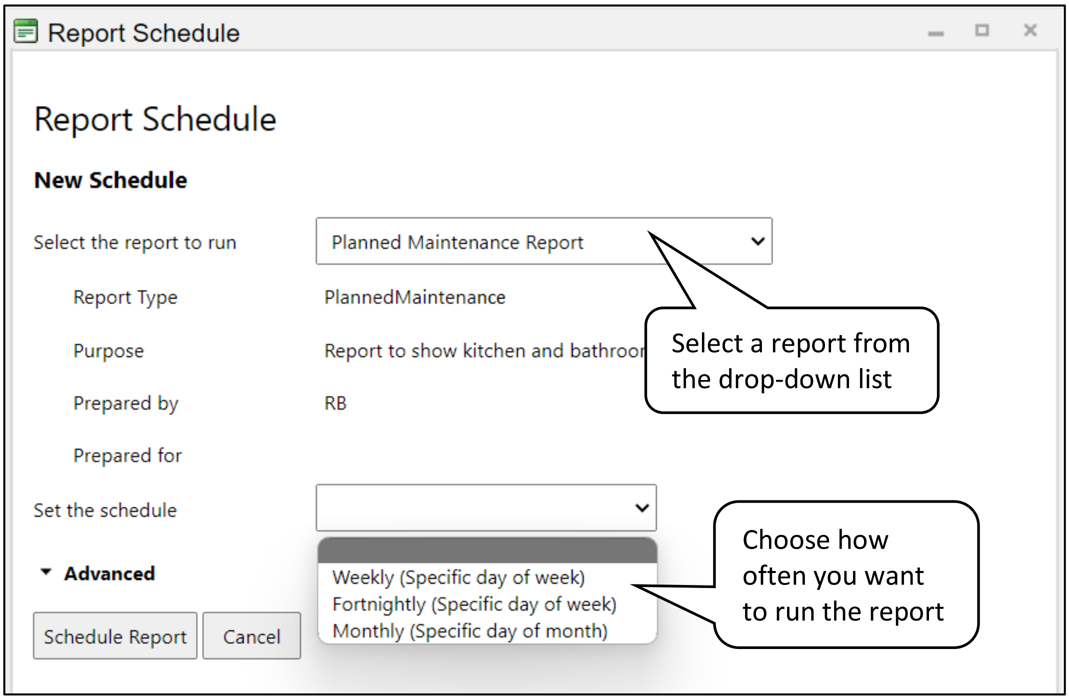


Figure 374: report schedule criteria

4. Once a schedule has been set you will need to select either the day of the Week or Month the report is to run on, dependant on the timeframe selected. Choose a day from the drop down list.

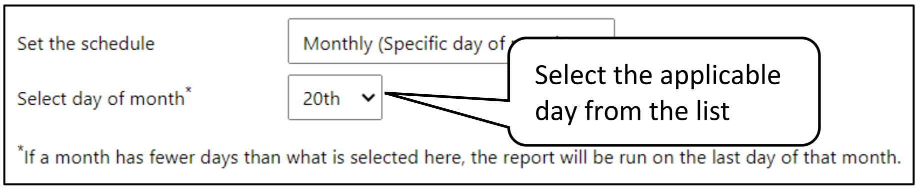


Figure 375: select a day

5. Click ‘Advanced’ to display the additional fields where you can define where the report should be sent.
   By default, the software will pre-populate the email address linked with your account. Use the free-text field to add any additional emails as required.

   The tick box can be used to schedule the report to run once, if left unticked a copy of the report will be sent to the emails provided as regularly as specified in the schedule.

6. Click ‘Schedule Report’ to save.

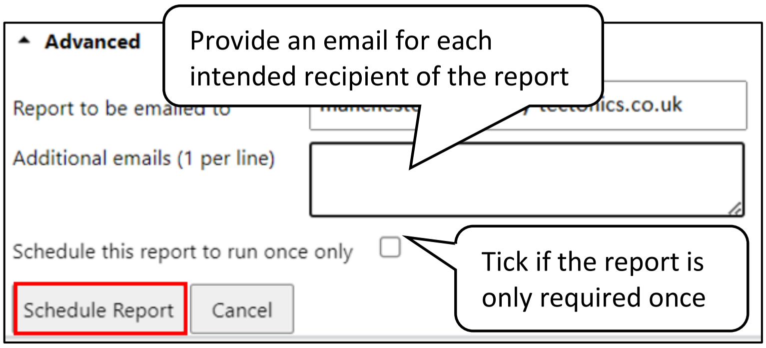


Figure 376: advanced report details

   Once saved you will be directed to the previous screen and a record of the new schedule will be displayed.

7. Follow steps 2-6 to create another schedule or close to return to the reporting area. If you need to remove an existing schedule, click ‘Cancel’ to the right of the record.

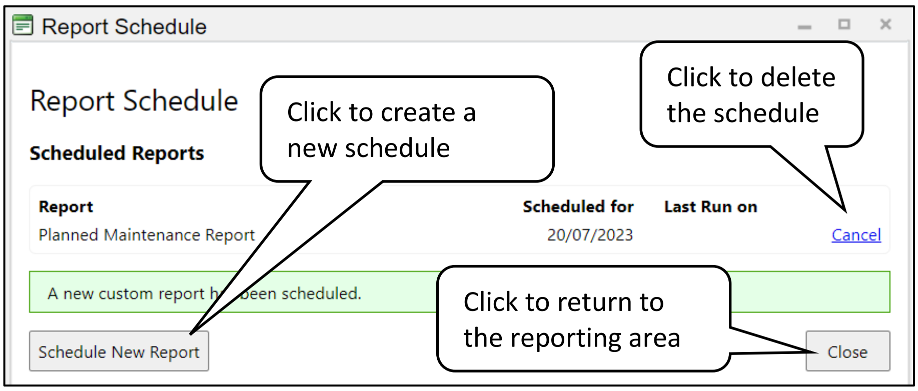


Figure 377: scheduled reports

23.3 Auditing

Changes made in the software are tracked though the change audit.

1. Click on the ‘Audit’ button under ‘Open’. The tool will open in a new window.

Figure 201*: location of the audit button*

The screen is split so your search criteria is displayed on the left and results will appear on the right. You will have to apply some search criteria before any data is displayed.

2. Use the options on the left of the screen to filter to the data you want to view.
   - <u>UPRN</u>: to search for audit history details of a specific property.
   - <u>Date Range</u>: to search for audit history details within a specific timeframe.
   - <u>Property</u>: to search for audit history details based on address information.
   - <u>Property Details</u>: to search for audit history details based on property details.
   - <u>Property Attributes</u>: to search for audit history details based on property attributes.

   In each of the property, property details and property attributes sections you can also apply an additional filter based on the action taken, either 'Insert', 'Update' or 'Delete'.

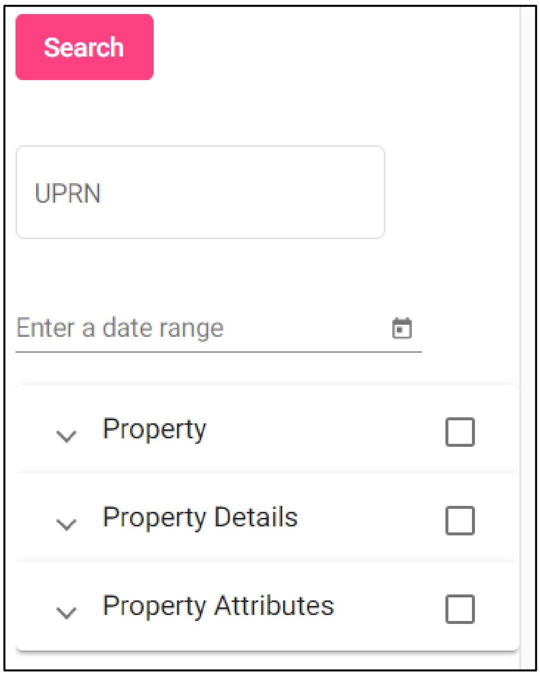


Figure 378: audit search criteria

NOTE The audit tool displays the information on the main screen over separate tabs to distinguish between the datasets from the list on the left. In order for any information to be displayed you need to ensure that at least one of the tick boxes has been selected.

3. To search by UPRN, use the free-text field to type in the details.

4. Enter a date range if required by either manually typing in the field or selecting via the calendar pop-up.

NOTE By default the audit tool will complete a full search up to and including todays date.

5. Use the tick box to the side of 'Property', 'Property Details' and/or 'Property Attributes' to include this information in the search.

6. Once a tick box is selected, further options will be available which enable you to add additional filters to your search results.

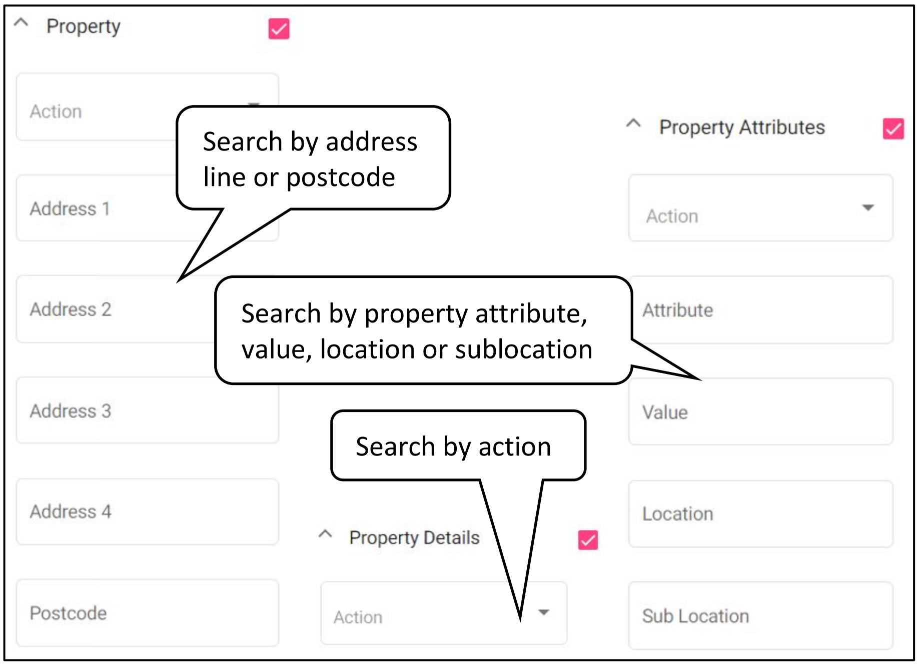


Figure 379: audit property filters

You can search by action within each heading which allows you to filter to audit items based on whether the record has been inserted, updated or deleted. Use the drop-down lists to select an action or use the free-text fields to enter the applicable search criteria.

7. Click 'Search' in the top left of the screen to apply the chosen criteria and display the results.

8. Review the data on the main screen, clicking on the relevant tab to display the results under each category.

9. The navigation arrows in the top right of the screen can be used to scroll through the pages depending on the number of results and the number of records displayed per page can be updated using the drop-down to the right of 'Items per page'.

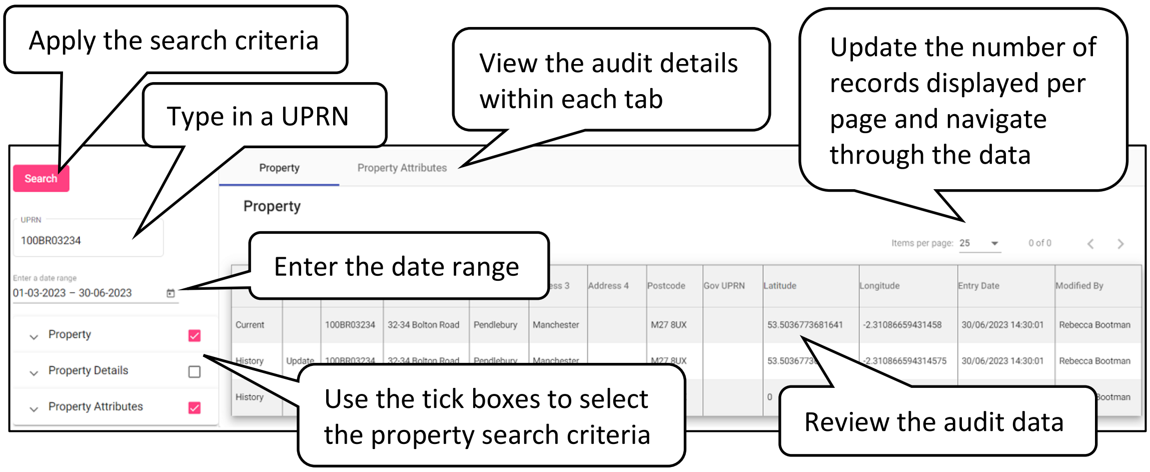


Figure 380: audit results

24. IT & Data Support

Our helpdesk includes a knowledge base with access to our software user manuals and a list of frequently asked questions and guidance notes, as well as enabling users to raise a support ticket for technical queries.

You can either access the helpdesk via a separate website or directly through the IT & Data Support button within the 'Help' section of Lifespan Housing.

You will be prompted to create an account when first accessing the area from either location.

To access the helpdesk via website search

1. Click the following link or paste URL https://property-tectonics.kayako.com/en-us/login into your browser.

To access the helpdesk Lifespan

1. The IT & Data Support button is available within the help section of each module and provides a direct link to our helpdesk.

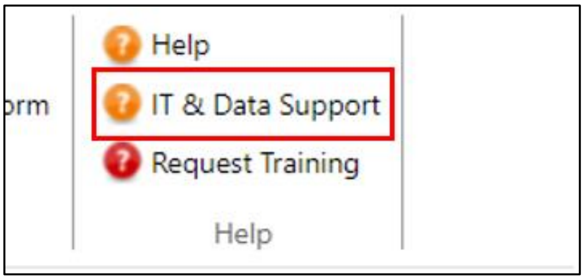


Figure 381: IT & Data Support button

2. The helpdesk will open in a new tab on your browser.

24.1 Logging In

Once you have opened the helpdesk via the website or through Lifespan, you will be directed to the login page. Enter your credentials to log in or click the 'Need an account? Sign up.' link at the bottom of the screen to create a new account.

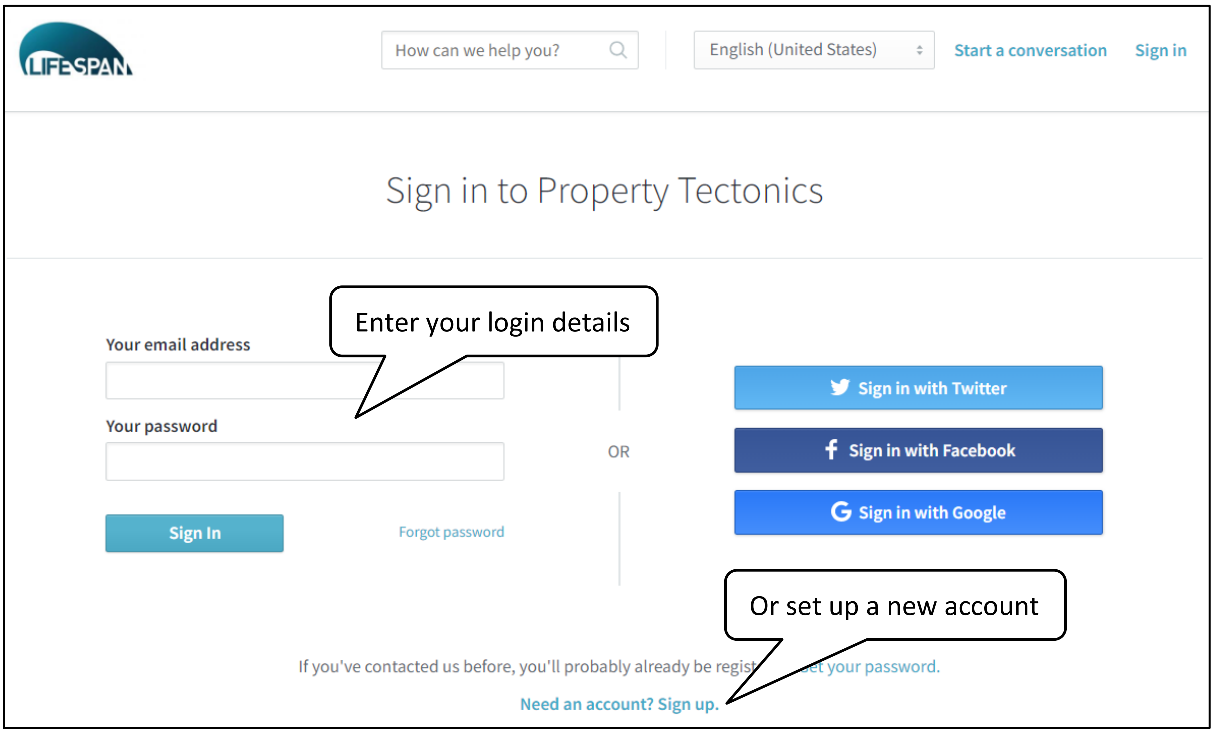


Figure 382: sign in or create an account

24.2 Knowledgebase

The helpdesk is split into different sections to cover the different Lifespan software products.

At the top of the screen, the search bar can be used to look for guidance on a specific topic.

1. Use the free text field to start typing in a query. Matching topics will appear as you are typing or a full list of results will be displayed once you click 'Search'.

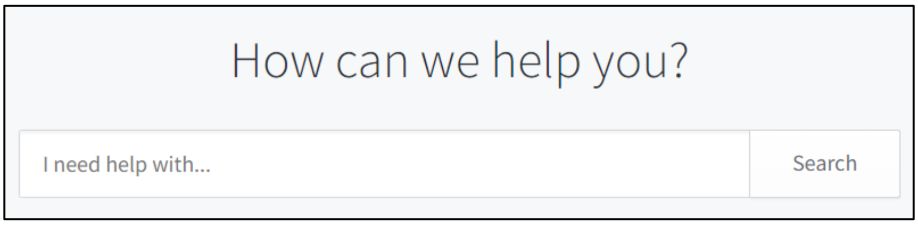


Figure 383: search for help

2. The 'Getting started' and 'Lifespan Housing' sections provide some general guidance and links, as well as some frequently asked questions. Click on any of the blue headings to be directed to the relevant information page.

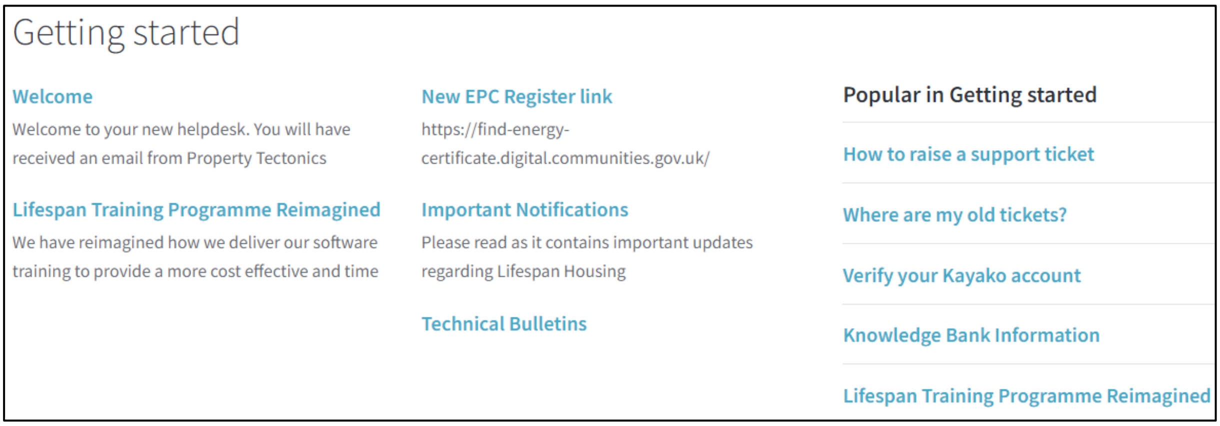


Figure 384: getting started

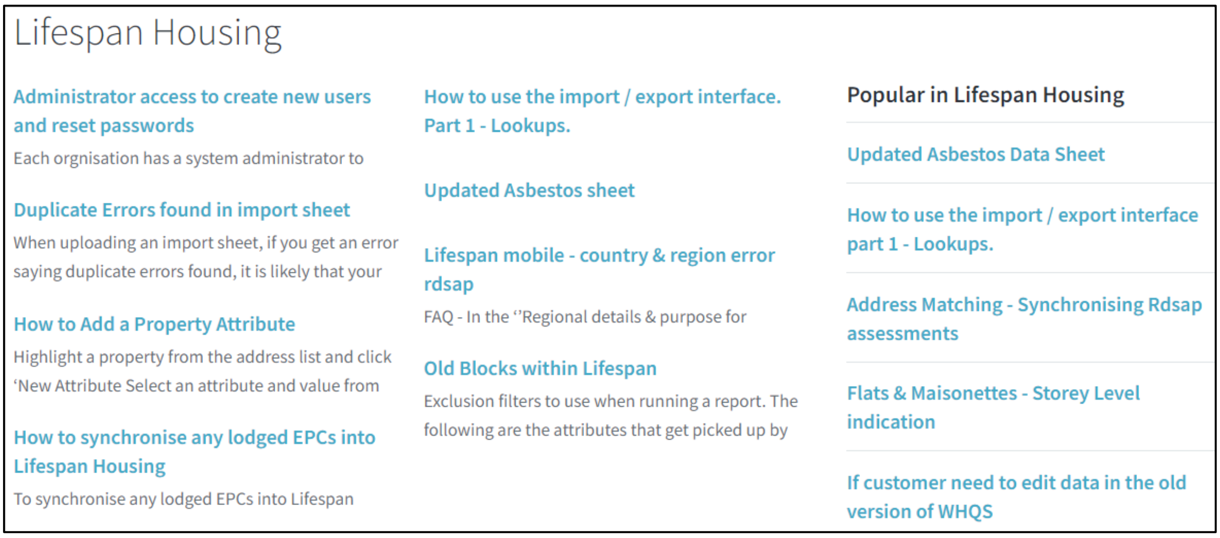


Figure 385: lifespan housing

3. Manuals are available to download for each Lifespan software product. For the Lifespan web manual, navigate to the 'Lifespan Software Manuals' section and select 'Lifespan Housing'.

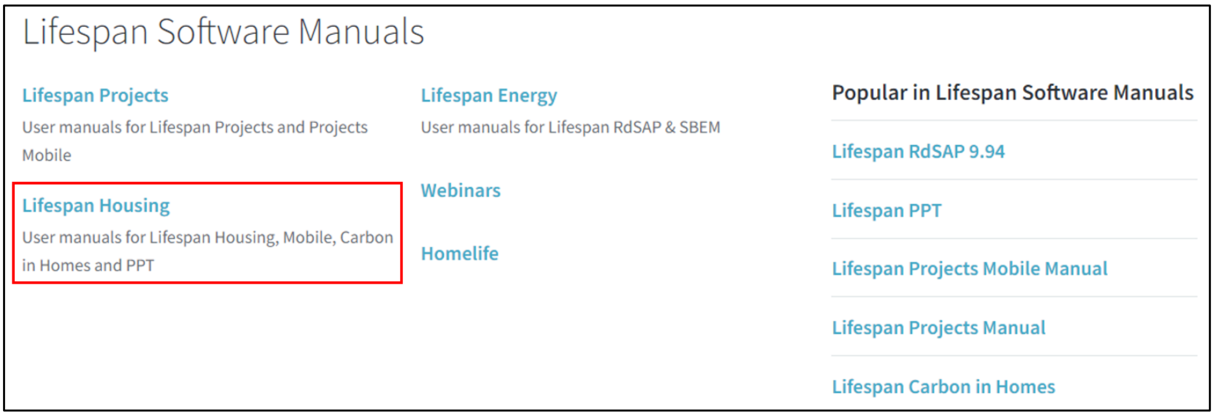


Figure 386: lifespan software manuals

Choose 'Lifespan Web User Manual' from the list and click to either 'View' or 'Download'.

Figure 387: view or download

24.3 Raise a Support Ticket

If you have any software queries, you can raise a support ticket which will send a message directly to the software team.

1. At the top of the screen, click 'Start a conversation'.

Figure 388: raise a support ticket

2. Select a software type from the list i.e. Lifespan Housing and Mobile before filling in the form. Please provide as much detail as possible including screenshots or attachments where possible before clicking 'Send'. This will come through to us for internal review and one of the team will be in touch with a response (you will receive all responses via email).

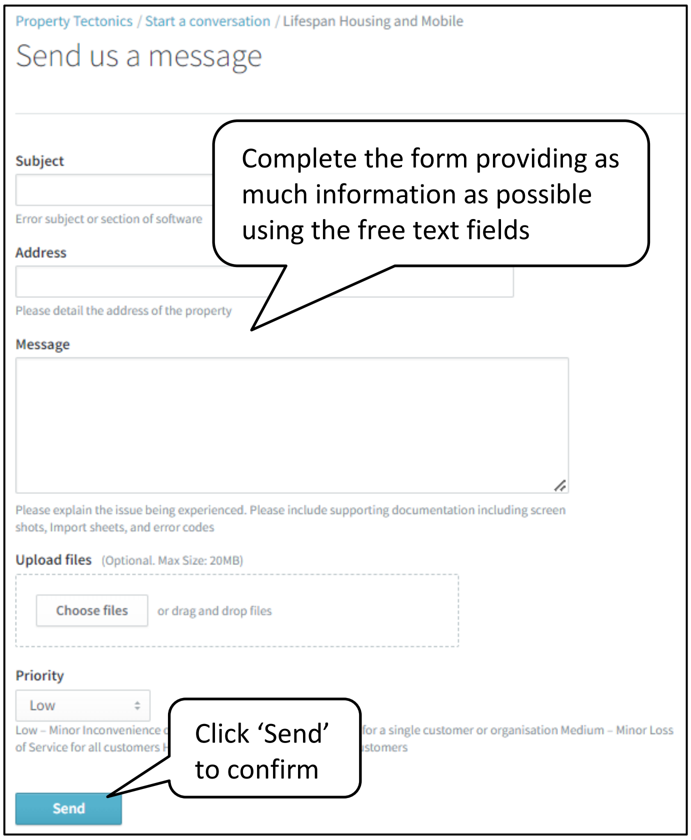


Figure 389: raise a support ticket

25. Lifespan Web Administration

Lifespan web administration is a webpage, linked with Lifespan Housing, which facilitates the administrator to carry out the following tasks for Lifespan user accounts;

- Create user accounts
- Reset user passwords
- Amend user permissions
- Update user settings

1. Follow the link below to navigate to the Lifespan web administration page.

   https://www.pt-lifespan.com/LifespanWebClientAdmin/Login.aspx

2. Login with your Lifespan credentials. The 'Remember Me' tick box can be used to save your details for future logins.

NOTE Only users with administrative access can login and use this facility.

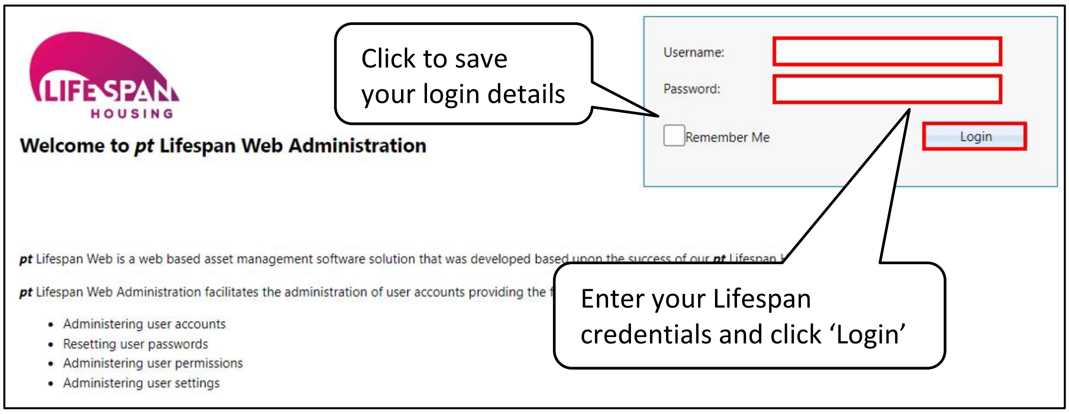


Figure 390: administration page login

25.1 Navigation

The page is set out in a similar style to Lifespan. Across the top of the screen is the menu bar which contains all of the function buttons enabling you to create new and update existing user accounts. On the left side of the screen is a full list of existing users for the account and the details pane contains information for the selected user including user details, permissions and user settings.

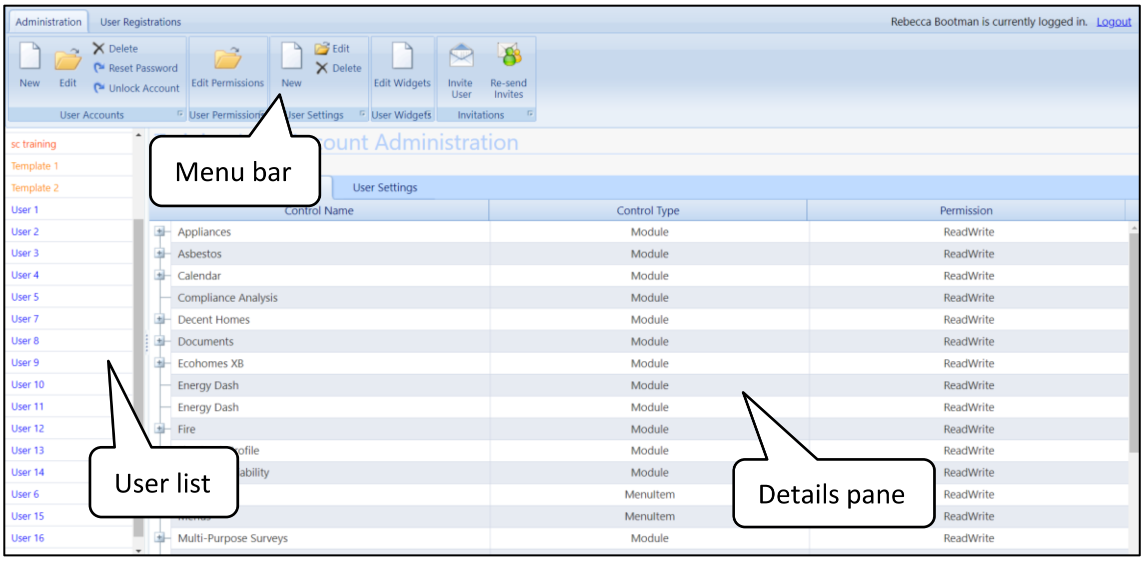


Figure 391: navigating the administration page

25.2 Creating a New User Account

1. From the menu bar, click 'New' within the 'User Accounts' section.

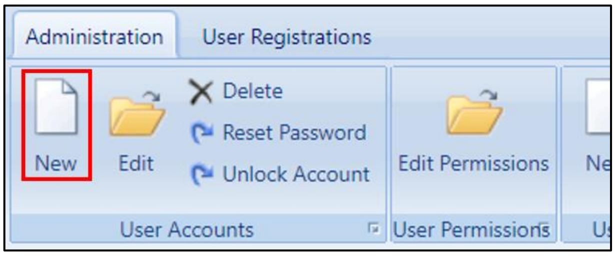


Figure 392: new button

2. Enter the details of the new user and click ‘Save’. The user list will be updated to include the new account.

- Forename/Surname: Free text fields to assign the name of the new user.
- Username: Free text field to define a username for the account. You can choose any username however it must be unique. Once the account has been created, the password is set automatically to ‘Lifespan’. The user will be required to change this when first logging in.
- Email: Free text field to define the users email address. Please ensure this is entered correctly as it will be required for two factor authentication when logging into the software.
- Copy User: This is not mandatory however can be used as a quick way of setting permissions. Select an existing user from the drop-down list and their permissions will be automatically applied to the new account.
- Add User to Role: Depending on what type of role the user has in the company, you can set them to either an administrator, contractor or user.
- Select User Type: Tick box to be used only for accounts you want to set as a ‘Template User’.

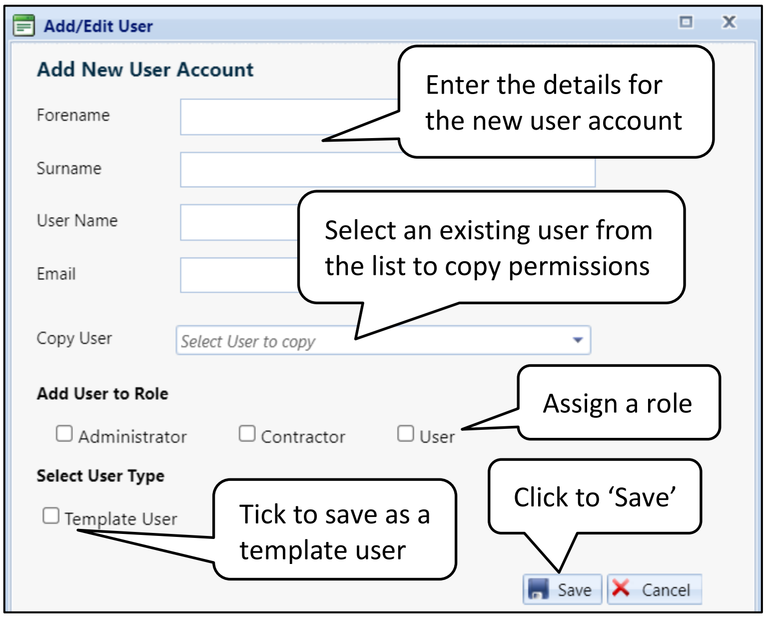


Figure 393: creating a new user account

25.3 Editing a User Account

1. Select a user from the list on the left and click 'Edit' within the 'User Accounts' section of the menu bar.

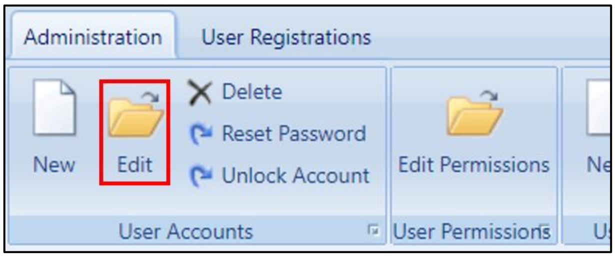


Figure 394: edit button

2. The 'Add/Edit User' screen will appear allowing you to make any changes to the selected user account. Amend the user details as required, then press save.

25.4 Deleting a User Account

1. To remove an account, select the applicable user from the list and click 'Delete' from the menu bar within the 'User Accounts' section.

Figure 395: delete button

2. A further dialog box will appear, to confirm the removal click 'Delete'. The account will now have been removed and the user will no longer have access to Lifespan.

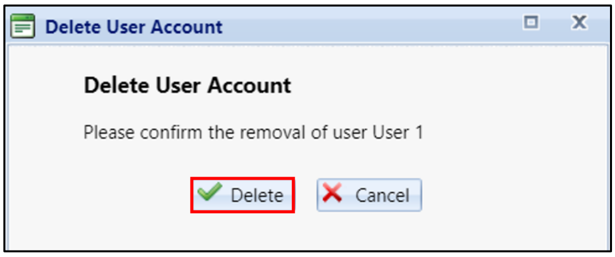


Figure 396: delete user account

NOTE Unless created in error, you would be advised to disable a user account rather than deleting it fully from the software, to ensure all auditing records remain intact.

25.5 Resetting a Password

1. To reset the password for an account, select the applicable user from the list and click 'Reset Password' from the menu bar within the 'User Accounts' section.

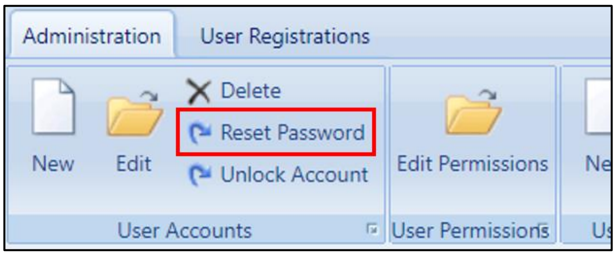


Figure 397: reset password button

2. A further dialog box will appear, to confirm the reset click 'Reset Password'.

   This will update the user account and revert the settings back to the default password of 'Lifespan'. When the user next logs in they will be prompted to change it.

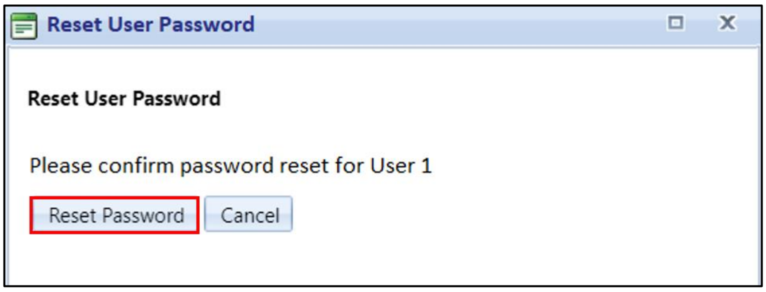


Figure 398: reset user password

25.6 Unlocking an Account

If a user fails to login after repeated attempts, the account will become locked preventing them to access it.

1. To unlock an account, select the applicable user from the list and click 'Unlock Account' from the menu bar within the 'User Accounts' section.

Figure 399: unlock account button

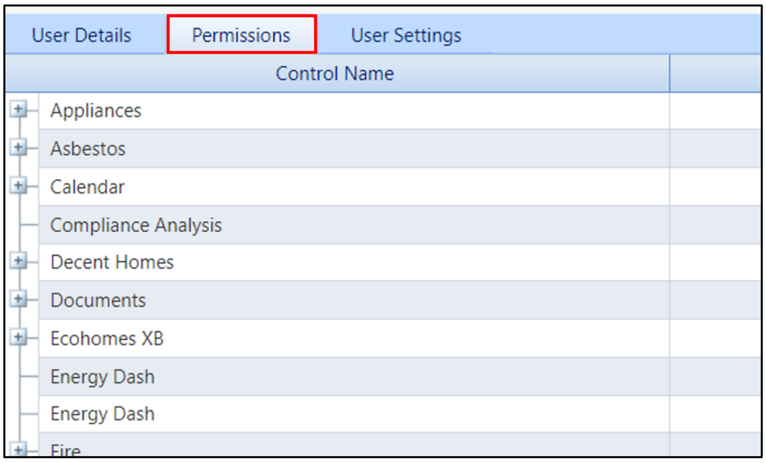
2. A further dialog box will appear, to confirm click 'Unlock User Account'. This will release the account and the user will be able to login.

Figure 400: unlock user account

25.7 User Permissions

Permissions are used to restrict access to certain areas or functions within Lifespan. They can be set differently for each user, depending on the level of access they require.

To view the existing permissions for a user you can select the 'Permissions' tab on the details pane and review the information below.



1. To update permissions for a user account, select the user from the list on the left and go to 'Edit Permissions' within the 'User Permissions' section.

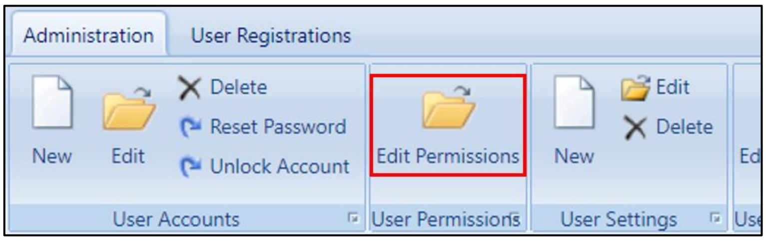


Figure 401: *edit permissions button*

2. The dialog box will show a list of all the modules within the company database along with listing the current permissions for the user. You can expand each module to show the

functions within each section and have the facility to change permissions for the entire module or just certain components of it.

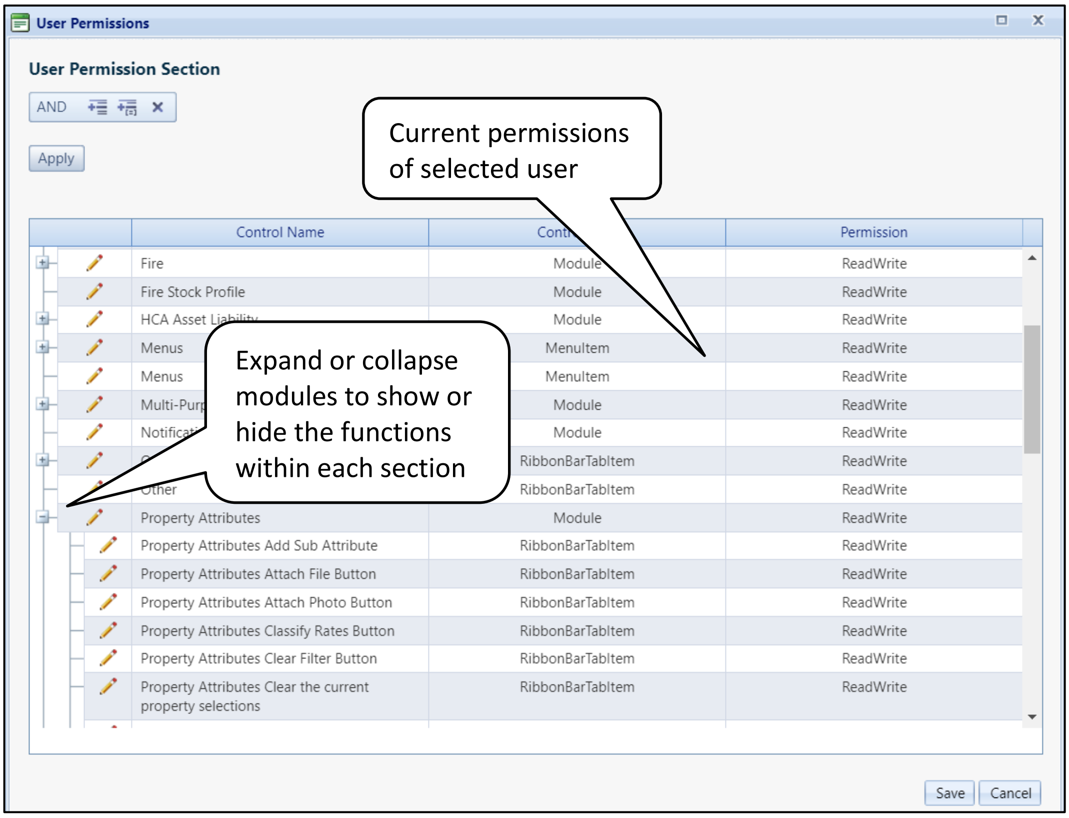


Figure 402: user permission section

3. Click on the pencil icon ( ) next to the row you want to edit. Choose which permission is required from the drop-down list next to 'User Permissions' and then click 'Update'.

   The permission options are outlined below.

- ReadWrite: The user will be able to view and edit the data.
- ReadOnly: The user will be able to view the data but has no editing capability.
- NoAccess: The user will not have visibility of the module/function on their account.

If you are on a module permission, you will also see the cascade changes tick box. If this is ticked, the access level chosen will apply to each component of the module. You can go back into each row to amend this where needed.

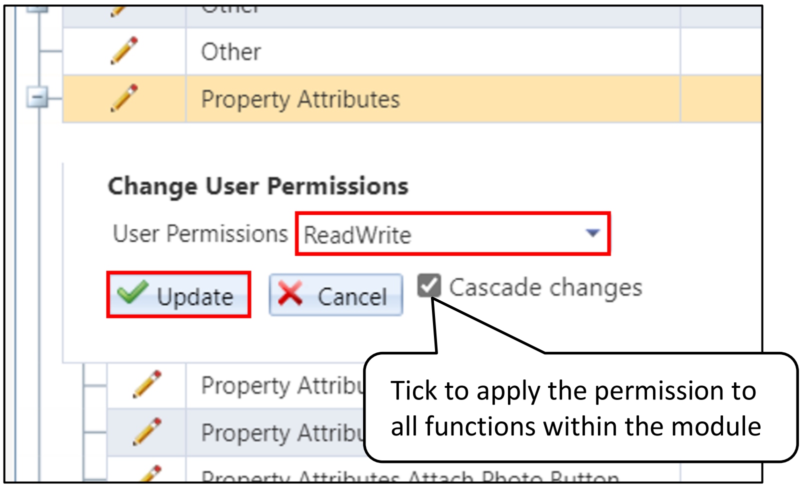


Figure 403: change user permissions

4. Once you have amended the permissions as required, click 'Save' to apply the changes. All permissions will be updated on the details pane and applied to the users account.

25.8 User Settings

This function enables you to configure user-level settings within Housing. There is ability to store details for the RdSAP and CiHA modules along with setting and storing links to other Lifespan software such as Lifespan Projects.

1. To create a new setting, select the user from the list on the left and then go to the menu bar and click 'New' within the 'User Settings' section.

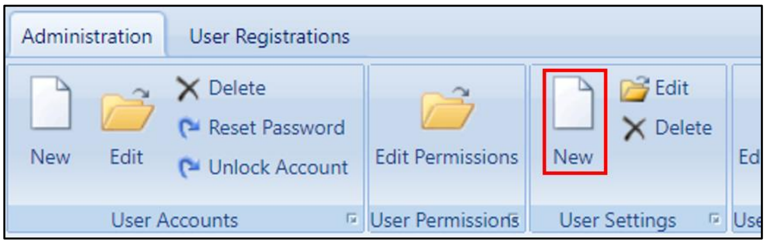


Figure 404: *new button*

2. Enter a name and value, then press 'Save'.

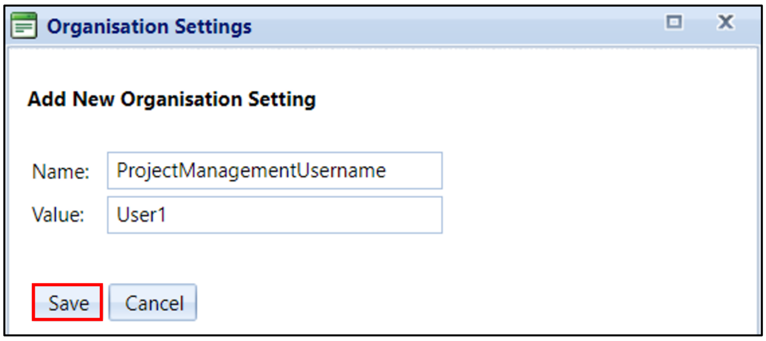


Figure 405: organisation settings

3. The setting will now appear in the user's account on the main screen. Select the user and go to the 'User Settings' tab, all saved settings will appear in the list.

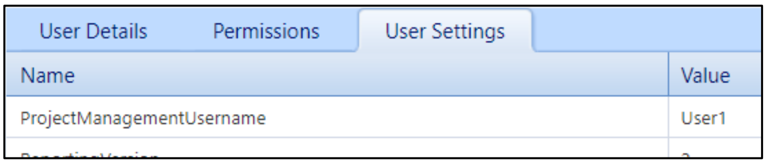


Figure 406: user settings

4. To edit an existing setting, select it from within the user account page and go to 'Edit'.

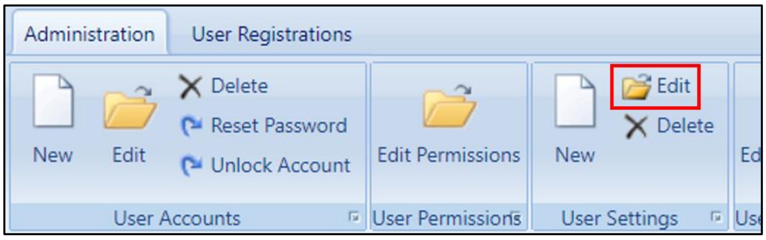


Figure 407: edit button

5. The current setting details will appear in a new window. Amend as necessary and click 'Save'.

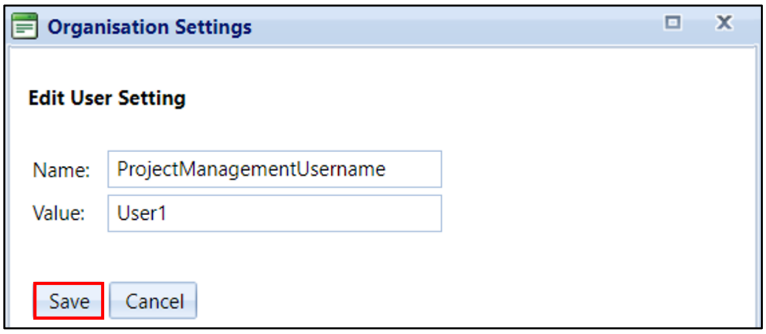


Figure 408: edit user settings

The updated setting will now show under user settings in the user account details page.

6. To delete an existing setting, select it from within the user account page and go to 'Delete'.

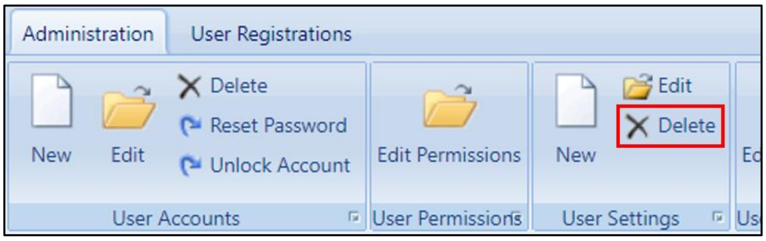


Figure 409: delete button

7. Click 'Delete' to confirm the removal.

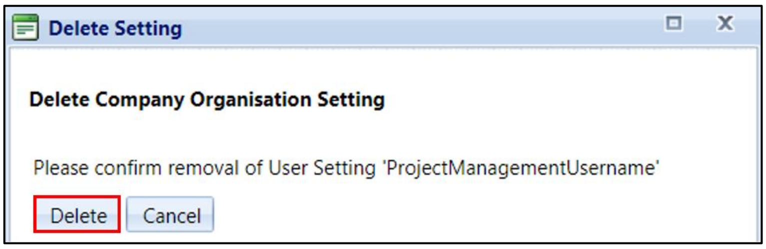


Figure 410: delete setting

Appendix One: Change Log

Date	Version	Changes
08/10/2013	0.1	First version written.
11/10/2013	0.2	Modified some screenshots and spacing.
17/10/2013	0.3	Added section on deleting planned maintenance schedules.
29/10/2013	0.4	Modified screenshots.
09/11/2018	0.5	Amendment to FRAs to cover version 2012.
14/11/2018	0.6	Added section on creating survey lists.
22/11/2018	0.7	Updated screenshots for use with latest version of Lifespan.
13/12/2018	0.8	Added section on lifespan web administration.
23/04/2019	0.9	Updated import/export section.
18/06/2019	0.10	Added section on appliances and updated FRA section.
23/09/2019	0.11	Updated RdSAP section.
16/10/2019	0.12	Update to custom reporting section.
22/02/2021	0.13	Updated Charts Facility for the report wizard. Report scheduling and automated emails for reports.
03/02/2022	0.14	Added sections for surveys and occupancy assessments. Updates made to attributes and RdSAP modules for uses in relation to PAS 2035 retrofit projects.
25/05/2022	0.15	Added sections for compliance, fire stock profile and energy dashboard.
03/07/2023	0.16	Amendments throughout including screenshot review/updates. General update/refresh to all modules for use with latest version of Lifespan.