



MOBILE

User Guide (V6)

Lifespan Mobile User Manual

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1. Getting Started

Lifespan Mobile is used on mobile devices for surveyors to record property data. The completed information can then be uploaded to Lifespan Web.

1.1 Launching Lifespan Mobile

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



Figure 1: launch lifespan mobile

2. In the 'unified' version of the software, you have the option to choose which environment you want to work in. Click the button for either UAT or Live to login.



Figure 2: choose environment (unified version only)

3. Confirm your selection by pressing 'yes' or click 'no' to choose an alternative environment.

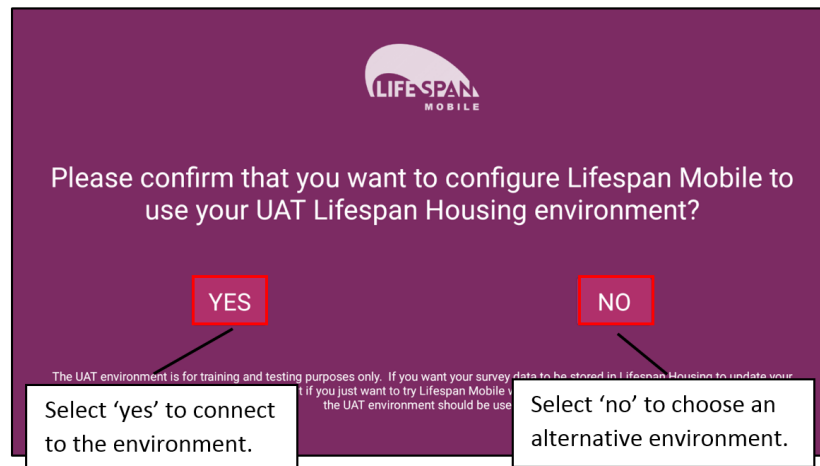


Figure 3: confirm environment selection

1.2 Sign In

You must sign into your Lifespan Housing account before you can synchronise properties to and from your tablet device.

1. Enter your Lifespan Housing username and password.
2. If you want to stay logged in to the software, press the button next to 'Keep me signed in'.
3. Tap Login.

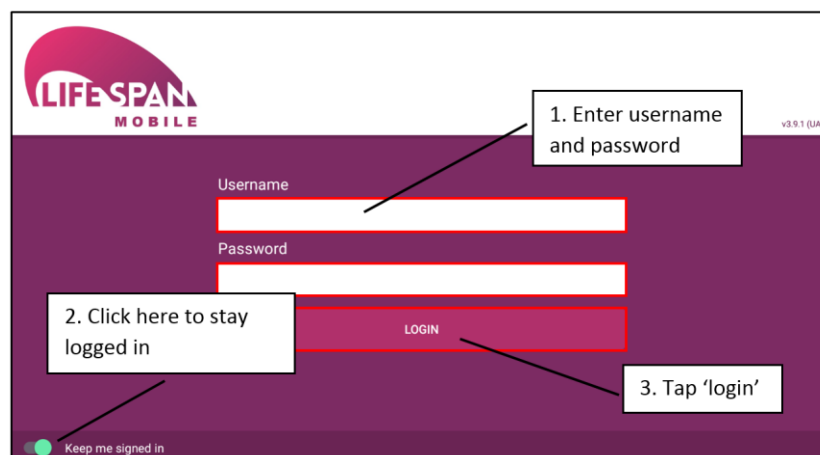


Figure 4: log in

1.3 Layout and Navigation

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

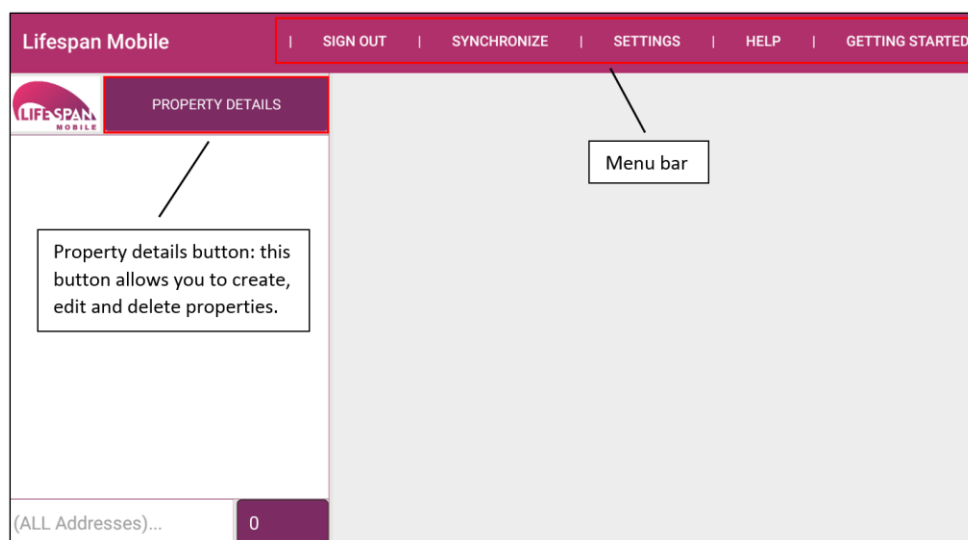


Figure 5: main screen

1.4 Menu Bar

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

- Sign Out – Sign out of Lifespan Mobile. You will need to sign into your Lifespan Housing Web account to allow you to upload and download properties to your tablet device.
- Synchronise – Synchronises properties to and from Lifespan Housing Web.
- Help – View the Lifespan Mobile user manual.
- Getting Started – Takes you to the survey screen.

1.4.1 Synchronise

The Synchronisation screen synchronises properties to and from Lifespan Housing. The screen is in 3 sections:

- Download – Download properties from Lifespan housing to your mobile device.
- Upload – Upload properties from your mobile device to Lifespan Housing.

- History – Displays the upload / download history.

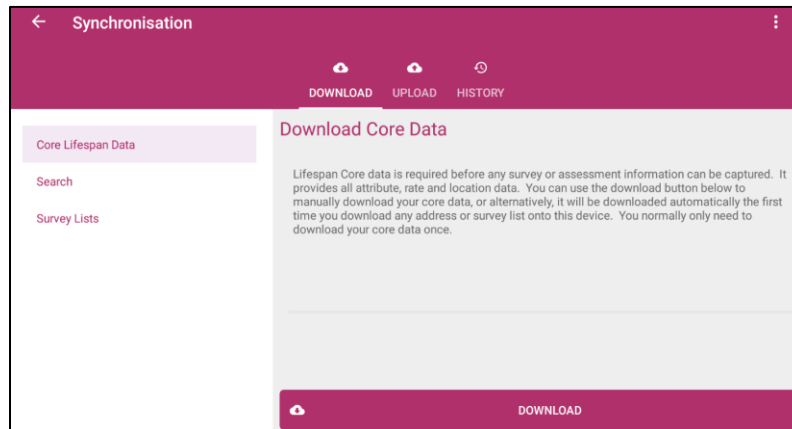


Figure 6: synchronise

1.4.2 Download

The download screen is split into 3 further sections.

Core Lifespan Data

Lifespan core data is required before any survey or assessment information can be captured. It provides all attribute, rate and location data.

1. Tap on Core Lifespan Data
2. Tap Download

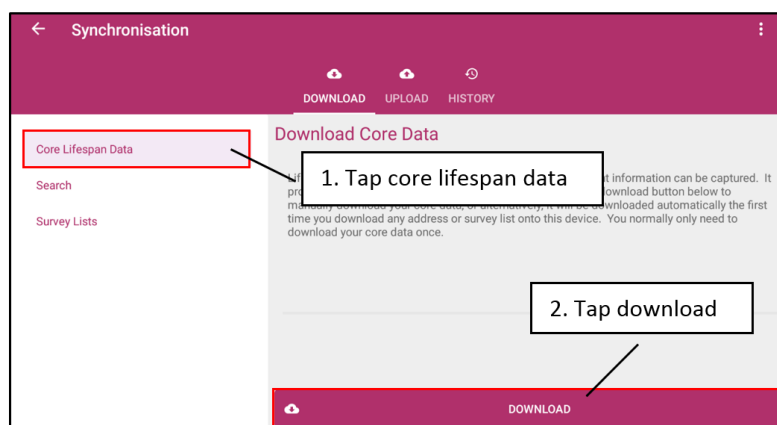


Figure 7: download core data

Search

Search the Lifespan Housing database for properties you wish to download to your tablet device.

1. Type part of the property address then tap search.

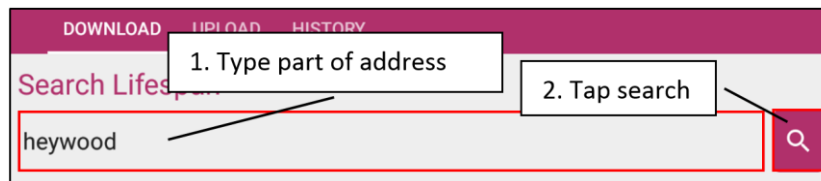


Figure 8: address search

2. Tap a property to select it then tap download selected.

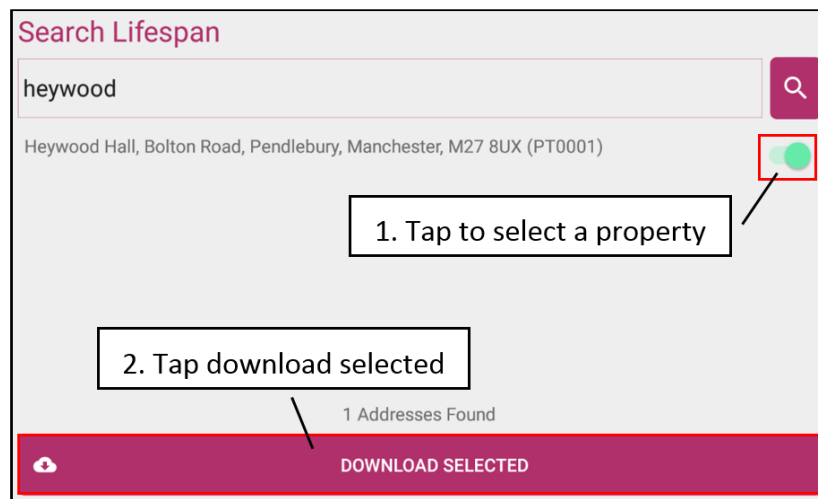


Figure 9: download selected address

3. Tap Yes to continue. Tapping No will return you to the previous screen.

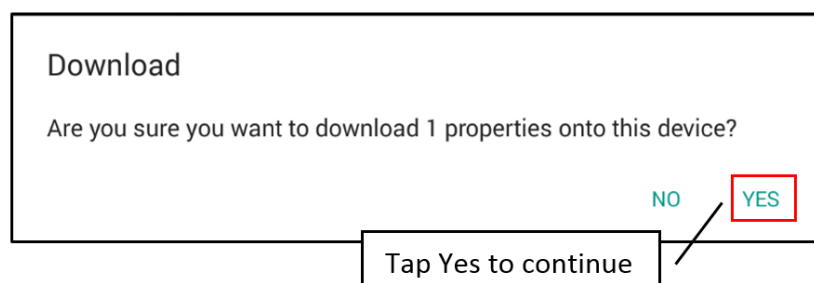


Figure 10: confirm download

4. Click OK to continue.
5. Click Synchronisation to return to the property list.

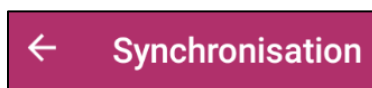


Figure 11: synchronisation back button

Survey Lists

Survey lists can be created in Lifespan Housing to simplify downloading multiple addresses.

1. Tap Refresh survey lists.
2. Tap the required survey list.
3. Tap Download Survey List.

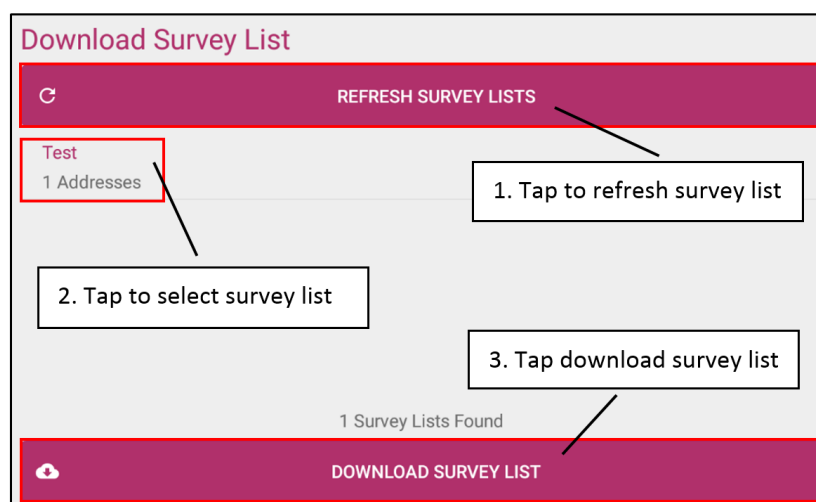


Figure 12: download survey list

4. Click OK to continue.
5. Click Synchronisation to return to the property list. See [Figure 11](#).

1.4.3 Upload

Upload properties into your Lifespan Housing database.

NOTE The upload will fail if you have not set the Surveyor Name and Survey Date in the “Edit the Selected Property” screen. Please refer to section **2.2 Editing a property**.

1. Either tap select all, or just the individual properties you wish to upload and click upload. Details of the upload will be shown on the right of the screen, listing the changes that will be applied to Lifespan Housing.

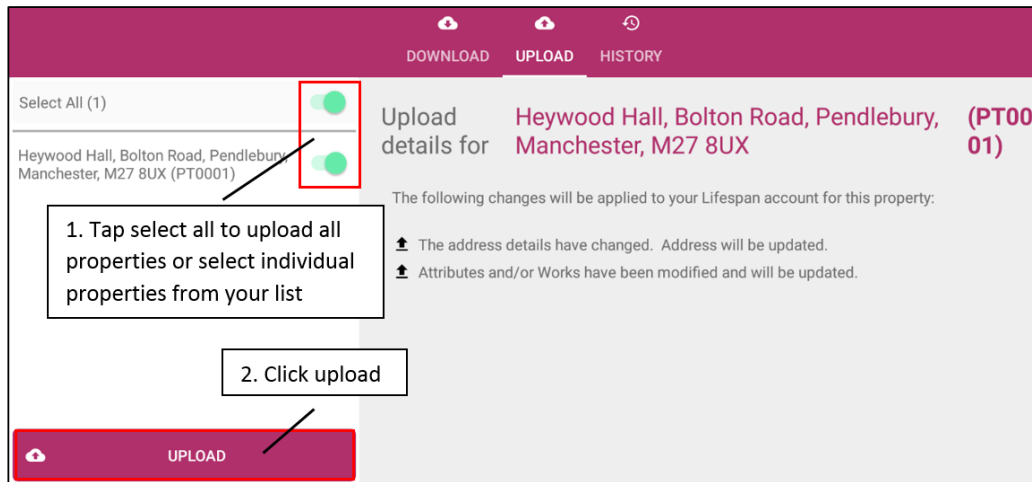


Figure 13: upload screen

2. Tap Yes to confirm upload. Clicking No will return you to the upload screen.

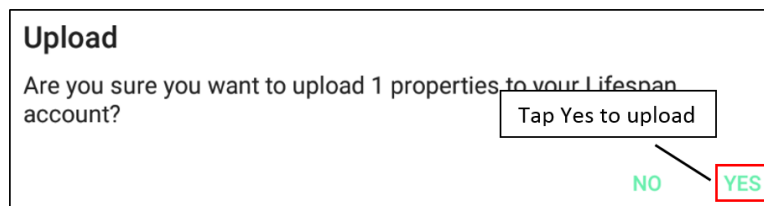


Figure 14: confirm upload

3. Tap OK to continue.
4. Click Synchronisation to return to the property list. See [Figure 11](#).

1.4.4 History

1. Tap on a time from the list on the left to view the history. Details will show on the right of the device.

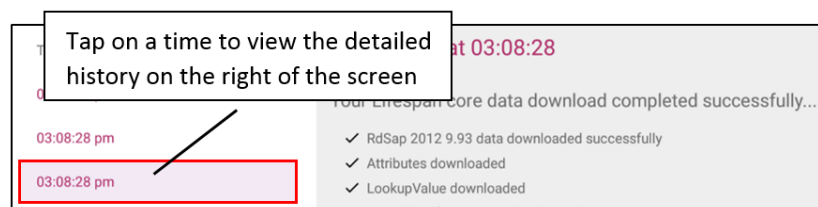


Figure 15: history

2. To clear the history, tap on clear history in the bottom left of the screen.



Figure 16: clear history

2. Properties

On the tablet, new properties can be created, or existing ones can be amended or deleted.

2.1 Creating a new property

1. To create a new property, select the Property Details button from the main screen.

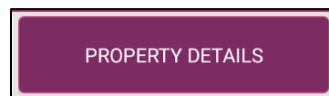


Figure 17: property details

2. Choose "Create a New Property" from the list.

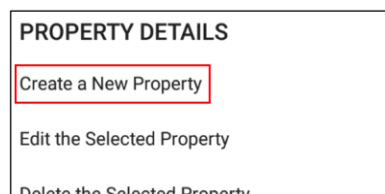


Figure 18: create a new property

3. Enter the property address and survey details. All fields indicated with a * are mandatory fields and must be completed before the address can be saved. Once completed, click save.

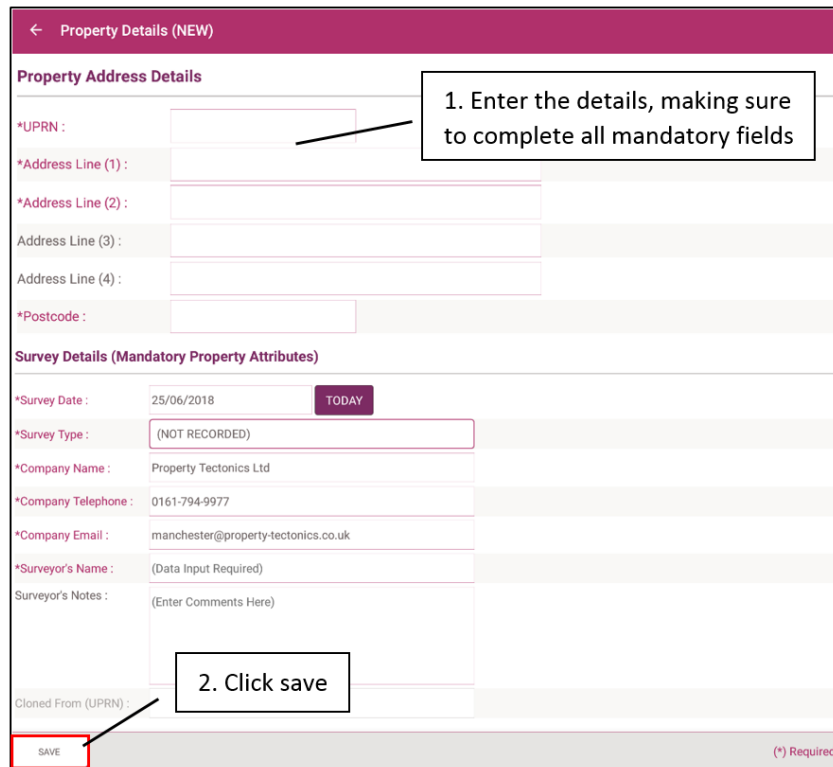


Figure 19: entering new property details

NOTE Selecting the back button will close the screen without further prompt and return you to the main screen without saving any details entered.

2.2 Editing a property

1. Select the property to be edited from your address list and click on the property details button. See [Figure 17](#).
2. Choose “Edit the Selected Property” from the list.

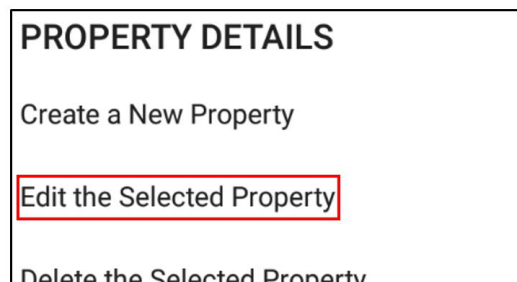


Figure 20: edit the selected property

3. Make the required changes and click the save button. See [Figure 19](#).

2.3 Deleting a property

1. Select the property to be deleted from your address list and click on the property details button. See [Figure 17](#).
2. Choose “Delete the Selected Property” from the list.

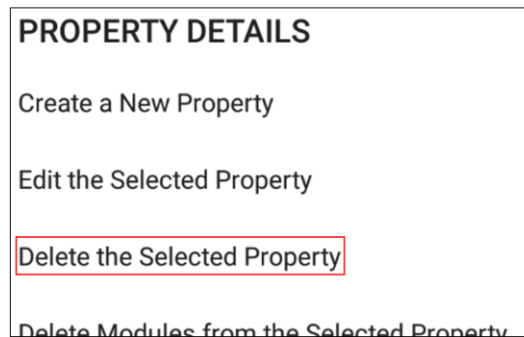


Figure 21: delete the selected property

3. Tap Yes to confirm deletion. Tapping No will return you to the main screen.

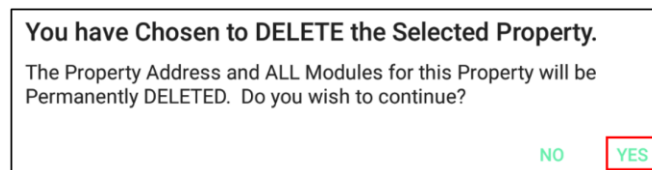


Figure 22: confirm deletion

3. Energy Survey

3.1 Access

1. Select the property you wish to add an Energy Survey to and click Energy to open the module.

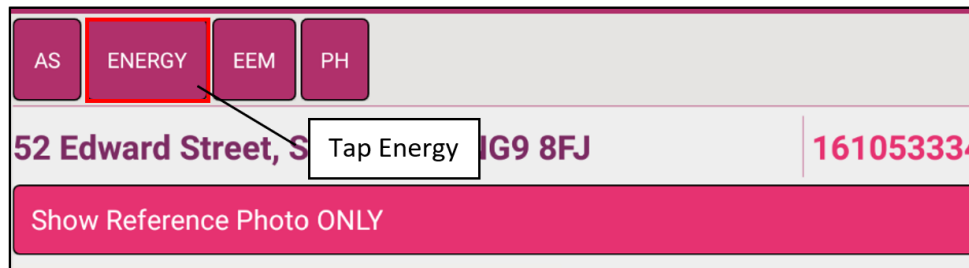


Figure 23: energy

3.2 Layout

1. The layout of the energy survey screen is described below:

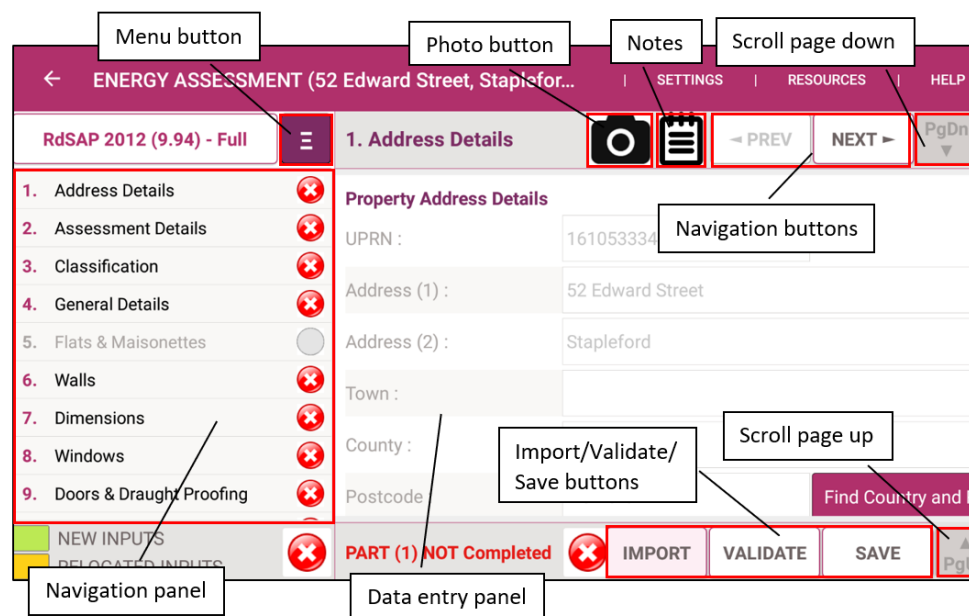


Figure 24: layout

3.3 Navigation

1. The assessment starts on Section 1 – Address Details. You cannot move on until the 'Existing EPC Details' section has been completed. Once the register has been checked and confirmed on the tablet, some of the greyed-out options on screen will unfreeze and you can work through each section sequentially until the assessment is complete.
2. The navigation panel includes a tick box next to each section, these will be filled in automatically as you complete the assessment.
3. You can use the navigation buttons to navigate to the Next or Previous screen or you can tap on a section directly in the navigation panel.

4. Some pages have more data than the screen can display at once, in these cases you can either swipe up/down on the tablet or use the PgUp/PgDown arrows to the right of the screen.
5. There is a photo button available on each screen allowing you to either select from the gallery or take a new photo via the tablet's camera.
6. The notes button is also available from every screen, so you can add supporting notes throughout the assessment.
7. 'Import', 'Validate' and 'Save' buttons are located at the bottom of each page.
8. Some questions within the assessment are highlighted to show updates from the previous RdSAP version. As shown in the bottom left of the screen, new inputs are highlighted in green and relocated inputs are highlighted in yellow.

3.4 Entering the assessment

NOTE The energy assessment does not save automatically. It is advised that you save the assessment at regular intervals throughout, to avoid any loss of data.

1. Every question in the assessment must be answered. Any unanswered or incorrectly answered questions will be flagged during validation.
2. The address is auto populated from Lifespan so you cannot edit the address within the energy assessment. In section 1. Address Details, the regional details can be input automatically by the software using the 'Find Country and Region' button. Tap once on this button and as long as the postcode is valid, the details will be populated.

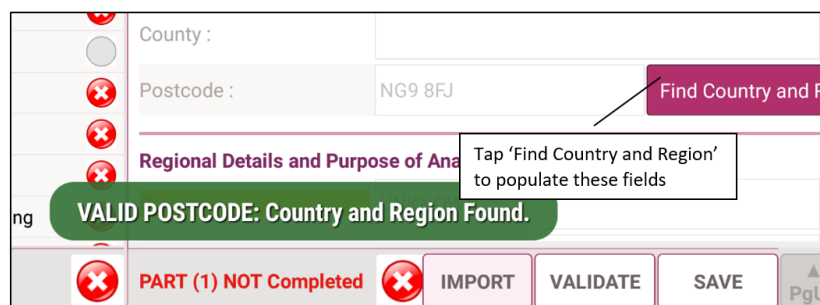


Figure 25: find country and region

3. Scroll down the page to get to the EPC section, this is new to RdSAP 9.94 and must be completed before you can continue the assessment.
 - Tap the 'Find EPC' button to bring up the EPC register on the tablet, you can then search by postcode to confirm whether there is an existing EPC for the property. Tap the radio button next to 'EPC Register Checked' to mark it as checked.

- If there is an existing EPC, you should tap the radio button next to 'EPC Found' and select a reason from the list below.

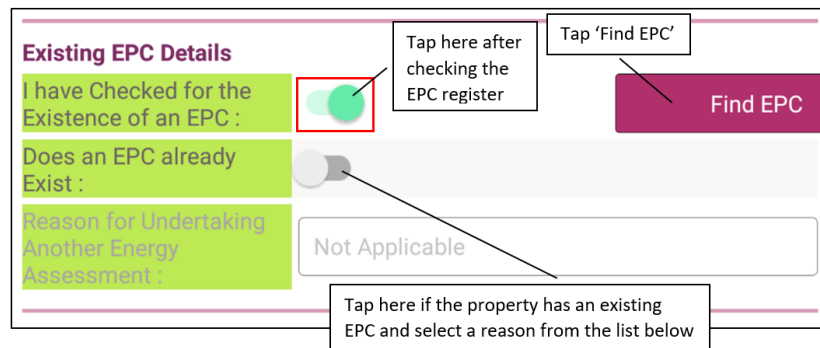


Figure 26: EPC register check

- Once a section has been completed, the icon in the navigation panel will change from a red cross to a green tick, to show your progress throughout the assessment.

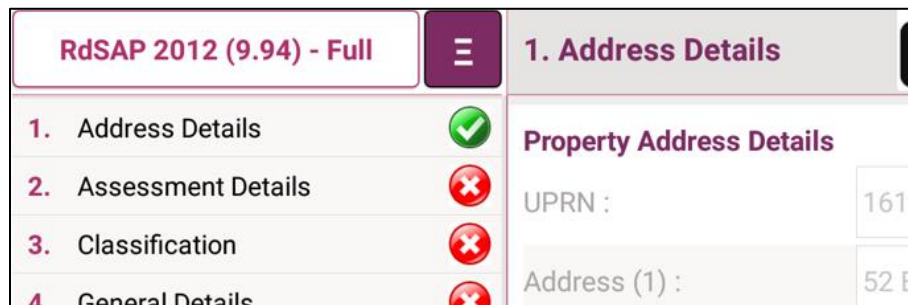


Figure 27: progress icon

- Some of the fields within the assessment have auto-fill buttons, so tapping on the button to the right of the question will populate the default answer.

i.e., Tapping 'Today' will set the date accordingly.

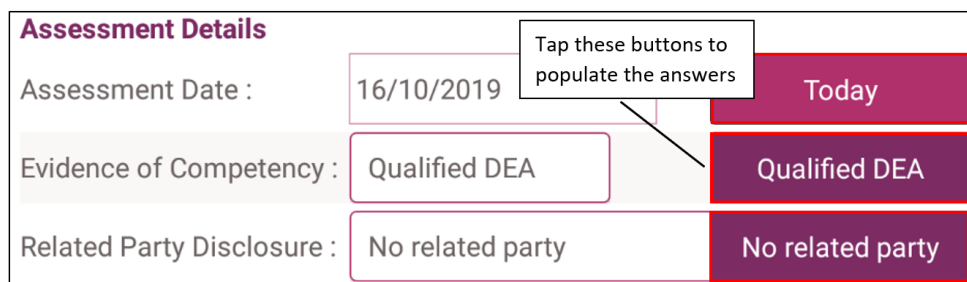


Figure 28: auto-fill buttons

If these are not the appropriate answers for an assessment, you can tap into the answer box to bring up further options.

- Tap on the 'Assessment Date' answer box to bring up the calendar tool. Select the date of the assessment, then tap ok.

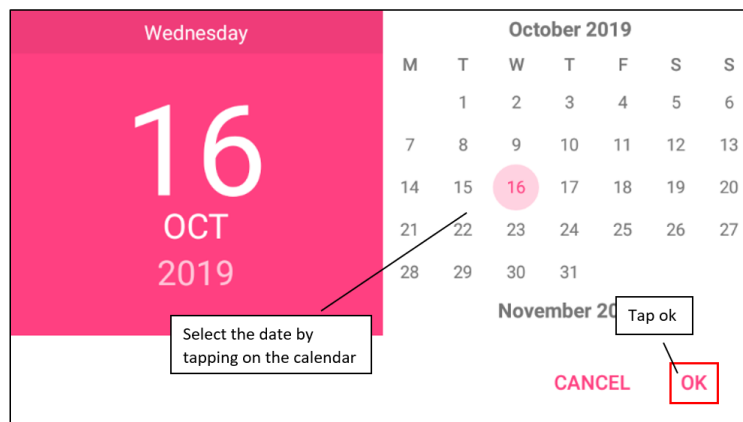


Figure 29: set the assessment date

- The answers for 'Evidence of Competency' and 'Related Party Disclosure' will pop up in a separate window. Select from the list to populate the answer.

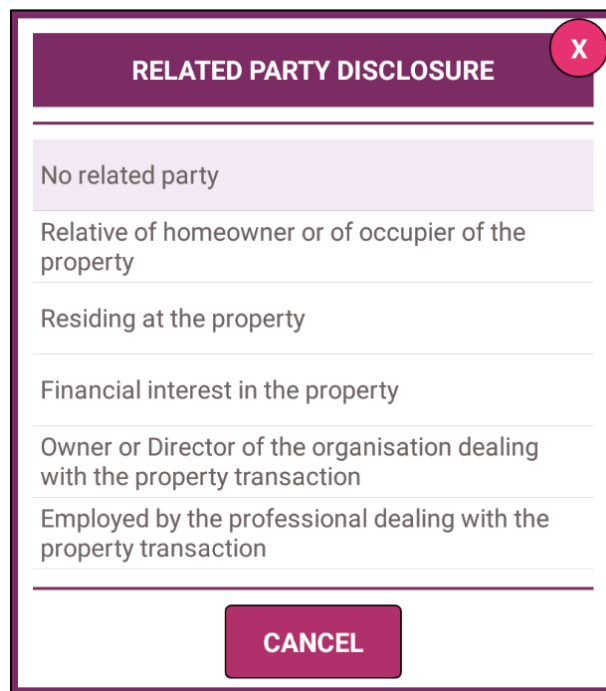


Figure 30: related party disclosure drop-down

- The majority of questions are answered by selecting a value from the drop-down lists, many with a preset option. Tap on the preset button to select a popular answer, or on the field to bring up the list of available answers.

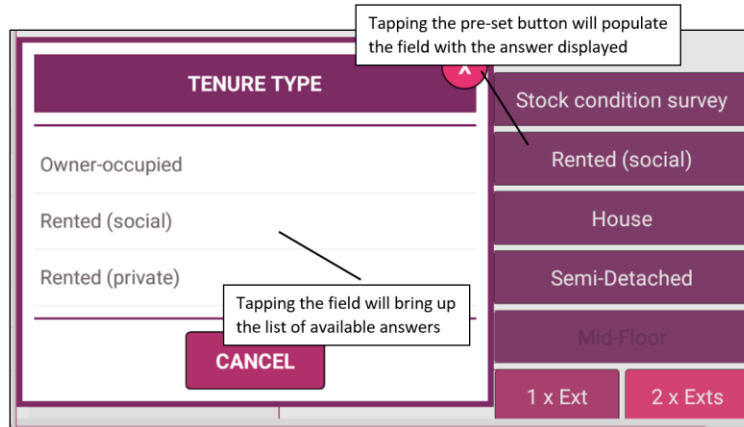


Figure 31: select an answer from the drop-down list

7. Some questions throughout the assessment make use of a radio button, by default these are greyed out to indicate they are answered as 'no'. Once pressed, the button will slide to the right and turn green, to show the answer as 'yes'.

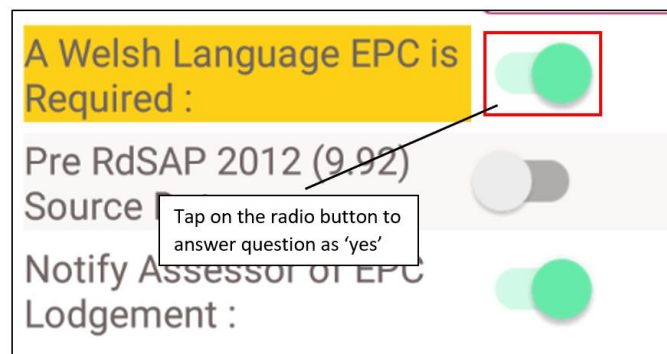


Figure 32: radio buttons

8. Some questions are greyed out until other selections have been made.
 - a) In the example below, tap the radio button if solar water heating is present. In this scenario, ticking the box causes the solar water heating details section to show.

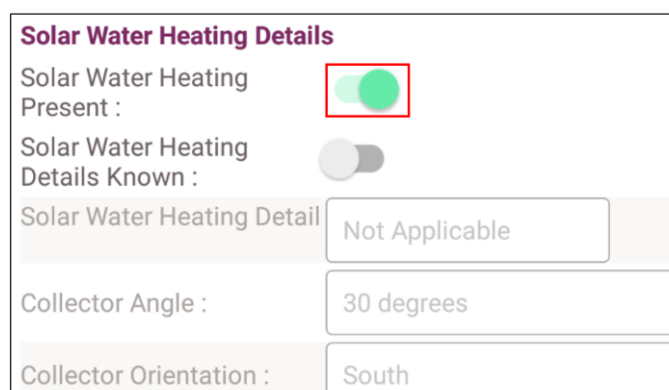


Figure 33: solar water heating tick box

- b) If the solar water heating details are known, tap the radio button and answer the additional questions by tapping on the field and selecting from the drop downs.

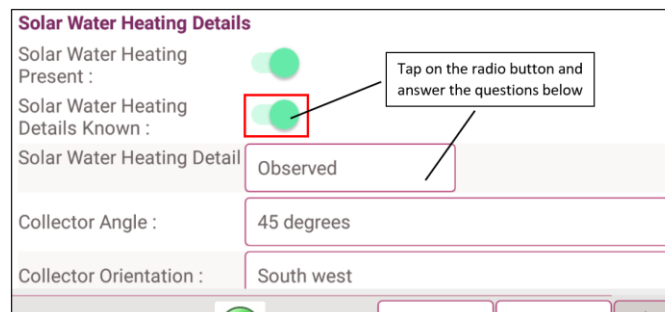


Figure 34: solar water heating details

9. Certain sections within the assessment have questions over multiple tabs. To navigate to an alternate tab, tap on it to display the questions below.

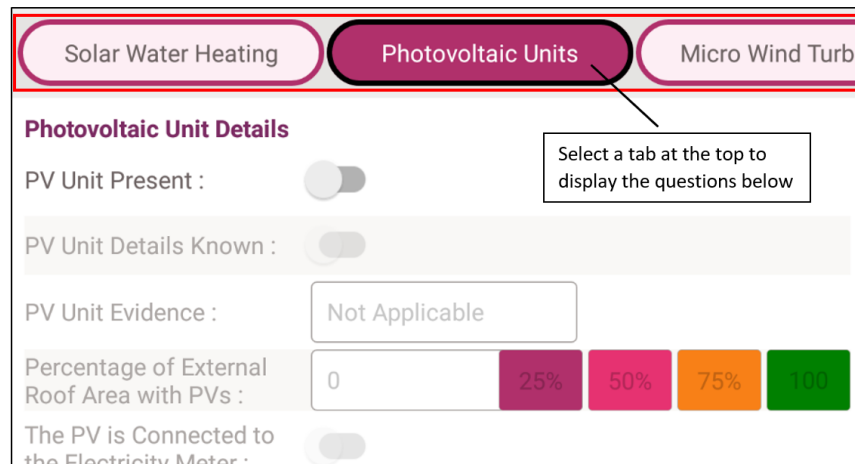


Figure 35: photovoltaic units

3.5 Occupancy Assessment

1. The occupancy assessment is collected within the energy module. To access the input fields, you must first set the purpose of analysis as 'Retrofit Assessment' within the address details section.



Regional Details and Purpose of Analysis

Country : England

Region : West Pennines

Purpose of Analysis : Retrofit Assessment

Existing EPC Details

Figure 36: purpose of analysis

2. Tap on the RdSAP button in the top left of the screen to open the 'Energy Assessment Parts' list.

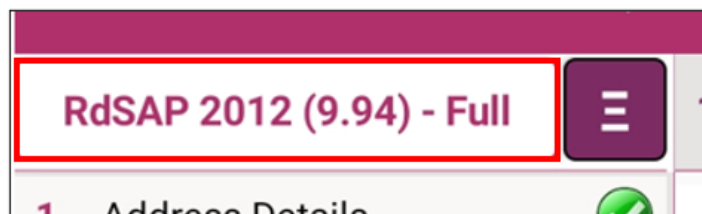


Figure 37: RdSAP button

3. Select 'Occupancy Assessment (9.92)' from the list.

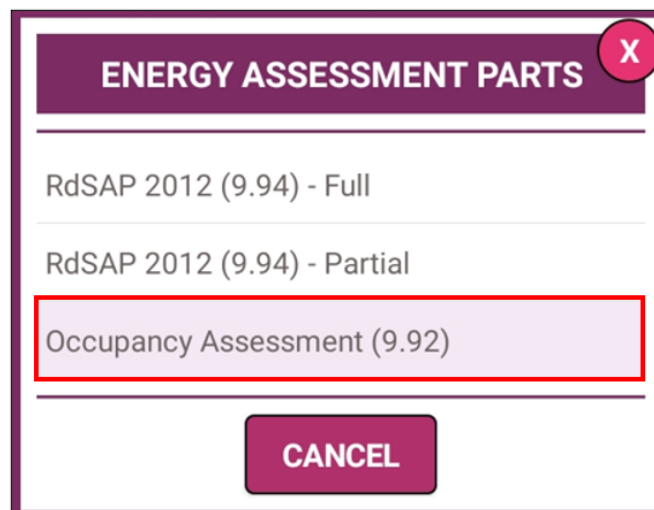
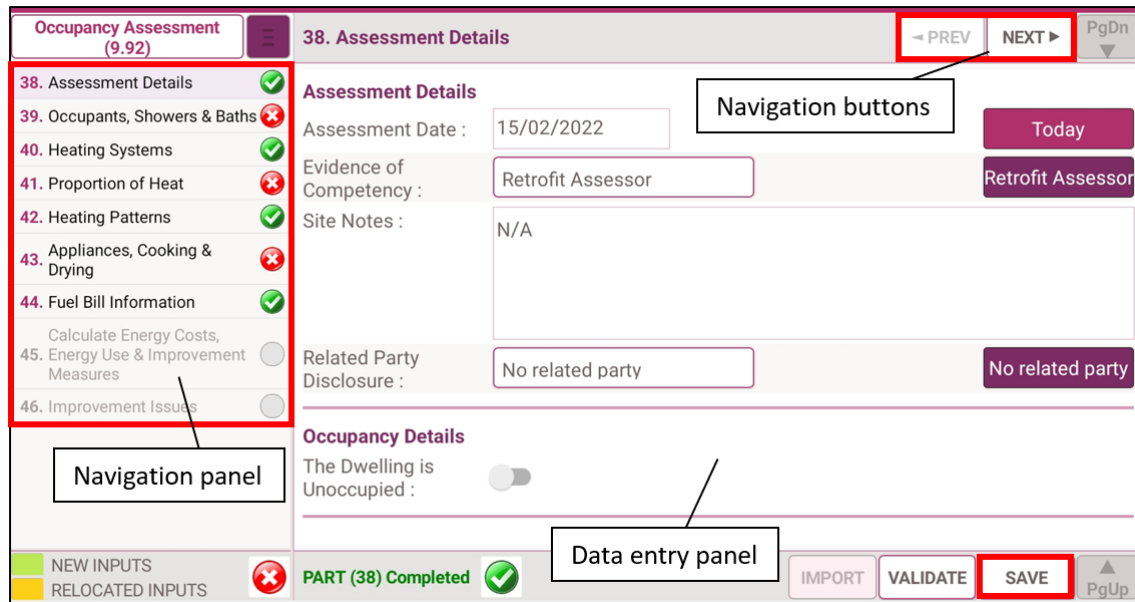


Figure 38: energy assessment parts

4. The assessment format follows the same layout as RdSAP, work through each section using the date, free-text, drop-down list or preset options to enter the data. As previous, you can tap on the section heading or use the previous/next buttons to navigate to the relevant questions. Once complete, tap 'Save' and click back to return to the main screen.



Occupancy Assessment (9.92)

38. Assessment Details < PREV NEXT > PgDn

38. Assessment Details ✓

39. Occupants, Showers & Baths ✗

40. Heating Systems ✓

41. Proportion of Heat ✗

42. Heating Patterns ✓

43. Appliances, Cooking & Drying ✗

44. Fuel Bill Information ✓

Calculate Energy Costs, Energy Use & Improvement Measures

45. Energy Use & Improvement Measures ○

46. Improvement Issues ○

Assessment Details

Assessment Date : 15/02/2022

Evidence of Competency : Retrofit Assessor

Site Notes : N/A

Related Party Disclosure : No related party

Occupancy Details

The Dwelling is Unoccupied :

NEW INPUTS RELOCATED INPUTS **PART (38) Completed** ✓

IMPORT VALIDATE **SAVE** PgUp

Figure 39: occupancy assessment

3.6 Additional features

1. Tap the menu button on the main screen to bring up the list of additional features.

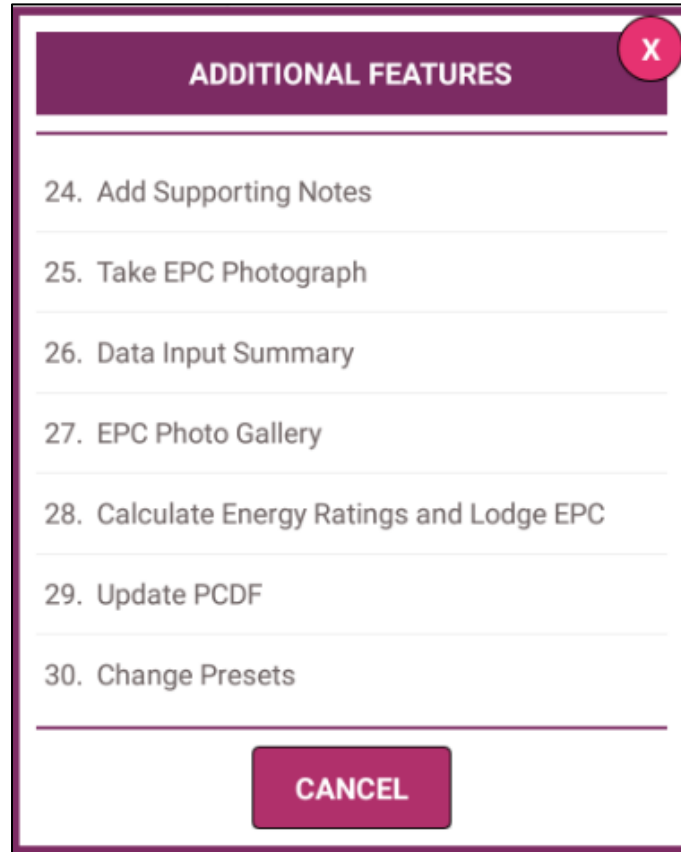


Figure 40: additional features

3.6.1 Add Supporting Notes

Notes can be added at any point during the assessment. This is a free-text field allowing you to enter as much information as is needed via the tablet keyboard.

1. Tap 'Add Supporting Notes' to bring up the details on screen.
2. Click into the comments box to bring up the tablet keyboard and enter any notes as required.
3. You can insert subtitles at key points within your notes by tapping 'Insert Subtitle' at the top of the screen.
4. Once finished, tap 'PREV' to return to the assessment.

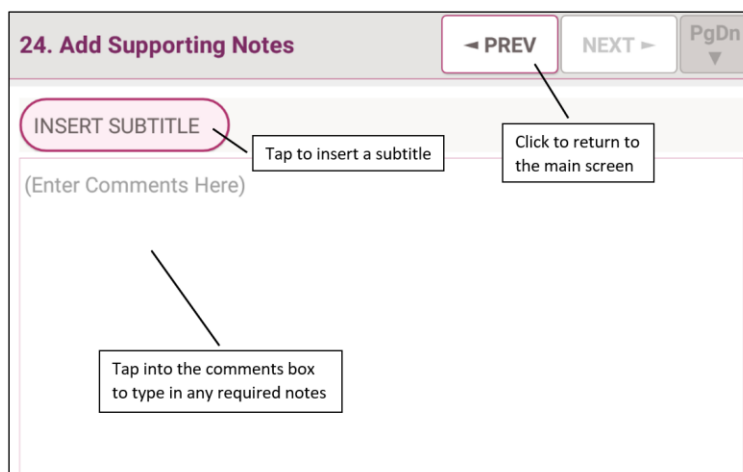


Figure 41: add supporting notes

5. Alternatively, you can access the supporting notes section directly by tapping on the notes button on the main screen.

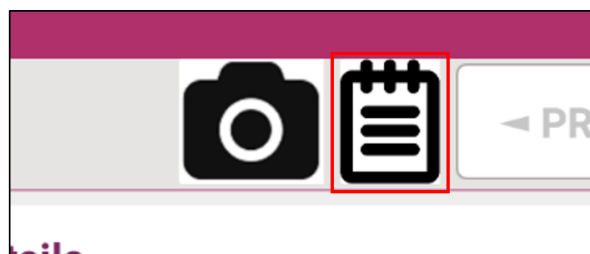


Figure 42: notes button

3.6.2 Take EPC Photograph

Photographs can be included at any stage of the assessment. You can either take a new photo using the camera on your device or select an existing one from the gallery.

1. Tap 'Take EPC Photograph' to bring up the options.

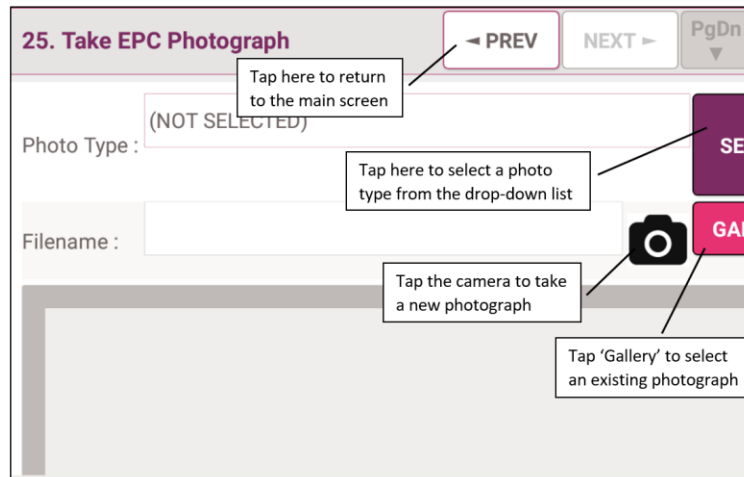


Figure 43: take EPC photograph

2. Choose a photo-type by using the select preset button and selecting from the list. The options are split into the categories below.
 - Mandatory Photographs
 - Applicable Photographs
 - Optional Photographs
 - User Defined Photographs

There is also an option here to create a new photo type. This is a free-text field, tapping on the space will bring up the keyboard on the device.

Anything added here will be saved within the 'User Defined Photographs' section for future use.

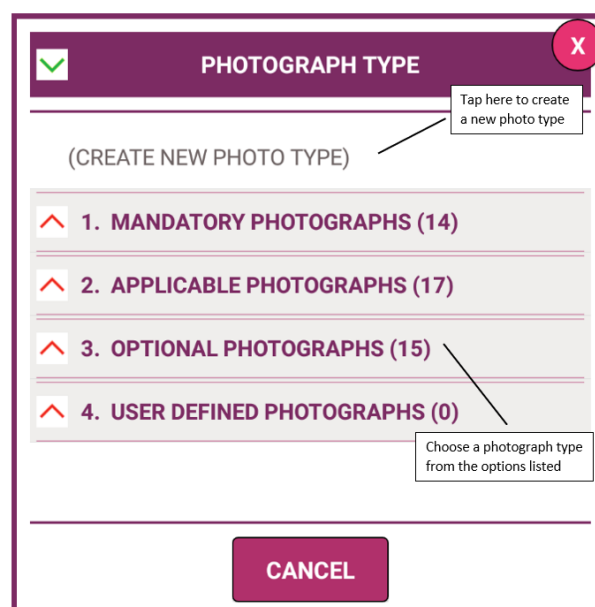


Figure 44: photograph type

3. Add a photograph.
 - a) To take a new photograph, tap on the camera icon which will open the camera app on your device.
 - b) Take a photograph. To accept the image, tap on the tick, or to retake the photo tap on the back button. Clicking the cross will return you to the photograph screen.

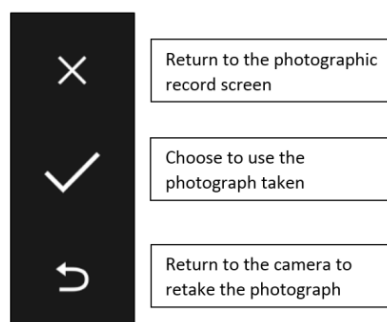


Figure 45: photograph options

The file name will be automatically populated once a photograph is attached.

4. Tap 'Save'.
5. Once finished, tap 'PREV' to return to the assessment.
6. Alternatively, you can access the photograph section directly by tapping on the camera icon on the main screen.

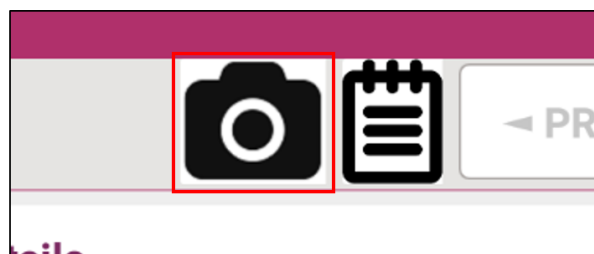


Figure 46: photo button

3.6.3 Data Input Summary

The data input summary screen provides you with an overview of data inputted so far in the assessment. You can select to view either a brief summary or detailed summary and it will be displayed on screen in report format.

1. Tap 'Data Input Summary'.
2. Choose either 'Brief Summary' or 'Detailed Summary' by tapping on one of the tabs at the top of the screen.
3. The data will be shown below, swipe up/down or use the PgUp/PgDn buttons to scroll through the report.
4. Once finished, tap 'PREV' to return to the assessment.

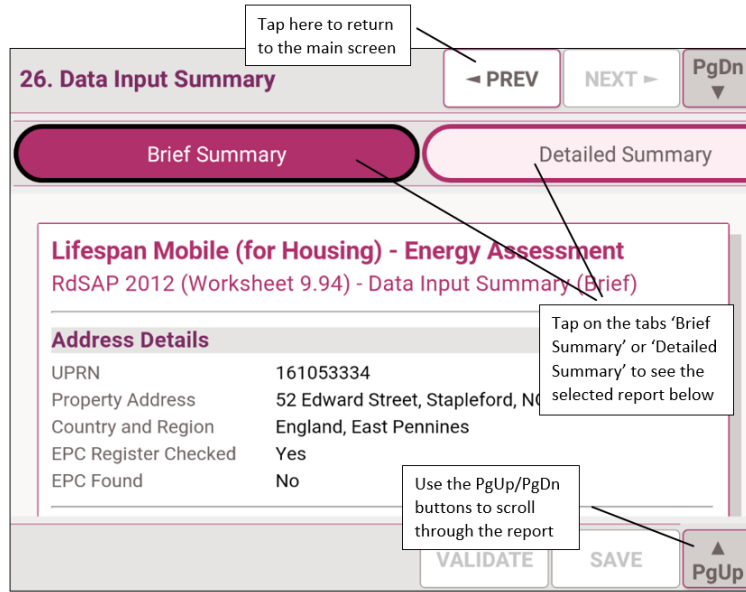


Figure 47: data input summary

3.6.4 EPC Photo Gallery

This section gives you an overview of all photographs taken throughout the assessment. Each image will have the photograph type and description detailed underneath it.

1. Tap 'EPC Photo Gallery'.

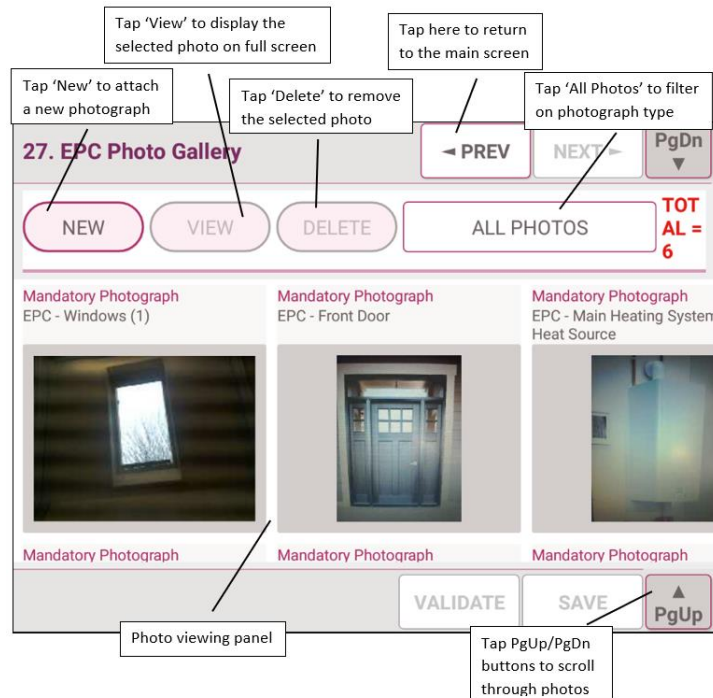
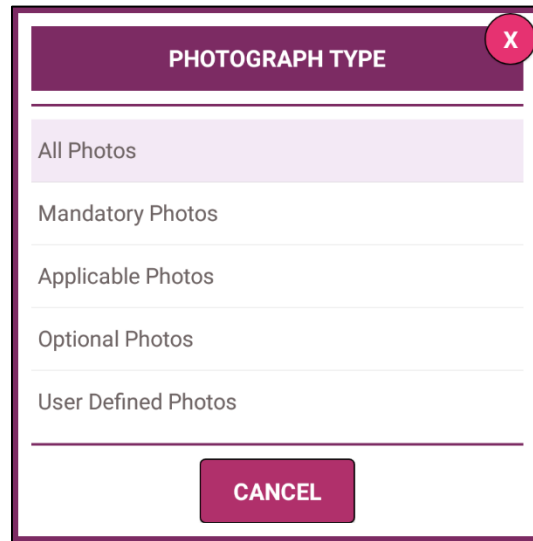


Figure 48: EPC photo gallery

2. By default, all photographs for the property will be displayed. Either swipe or use the PgUp/PgDn buttons to scroll through them.
3. Tapping on 'All Photos' will bring up the list of photograph types, enabling you to filter to a specific group of photos. Select a photograph type by tapping on it to display just the photos within the specified category.

You can return to this menu at any point to select an alternative type or show all photos.



4. To 'View' and 'Delete' photographs, you must first select an image. These buttons will be greyed out until you have selected one. Select an image by tapping on it, it will be highlighted by a pink border.
 - a) Tap 'View'. This will display a larger version of the selected image.
 - b) Tap 'Delete'. A confirmation box will appear, select 'Yes' to delete or 'No' to cancel and return to the previous screen.

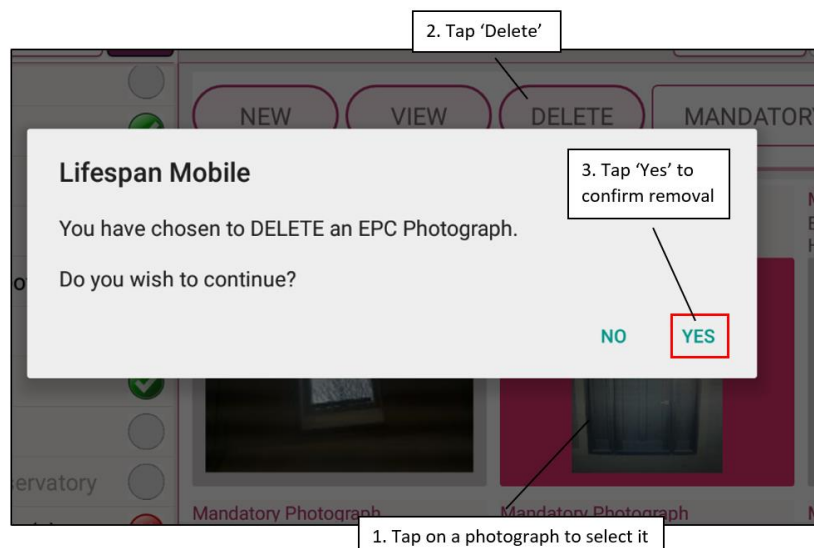


Figure 49: delete a photograph

3.6.5 Calculate Energy Ratings and Lodge EPC

This facility should be used once you have completed the assessment. It gives you the option to send data across to the lodgement software, login to complete the lodgement and retrieve the results.

1. Tap 'Calculate Energy Ratings and Lodge EPC'.
2. The section is split into three tabs, you will have to complete each tab before moving onto the next.
 - a) Select the 'Send Data' tab and tap 'Send Data Now' to send across the assessment data to the lodgement software.

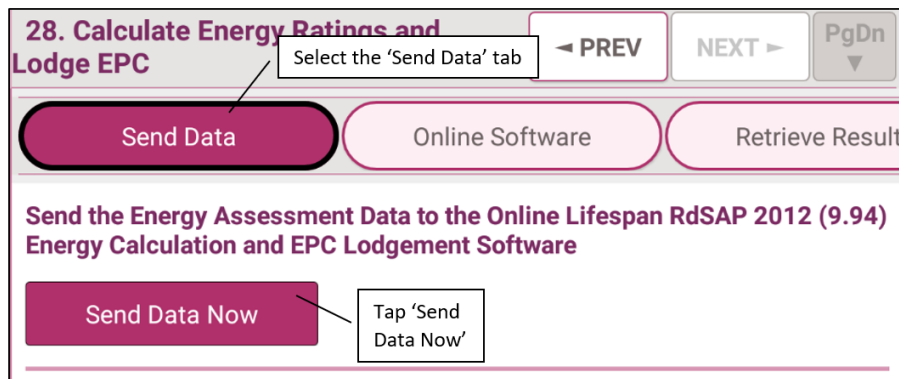


Figure 50: send data

- b) Once the data has been successfully sent, you will be directed to the 'Online Software' tab. Type in your login details to access the software and complete the lodgement.

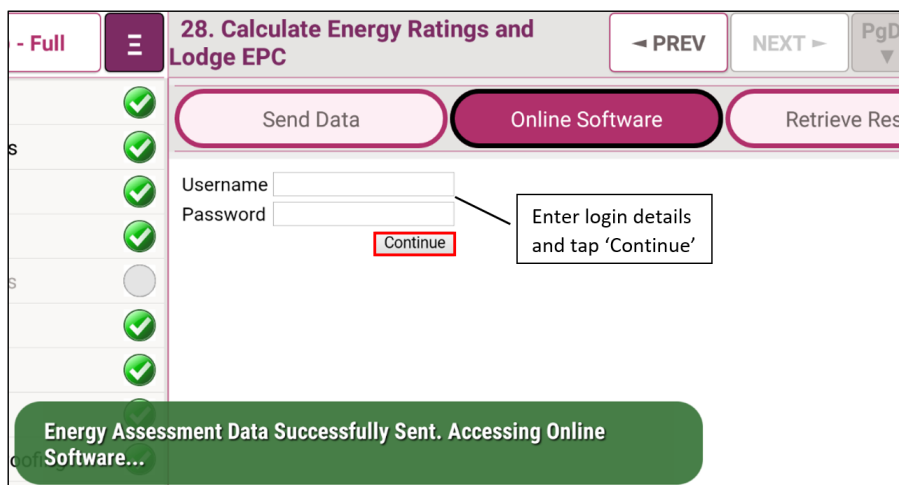


Figure 51: online software

- c) After completing the lodgement, select the 'Retrieve Results' tab. Tap 'Retrieve Results Now' to access the lodgement details.

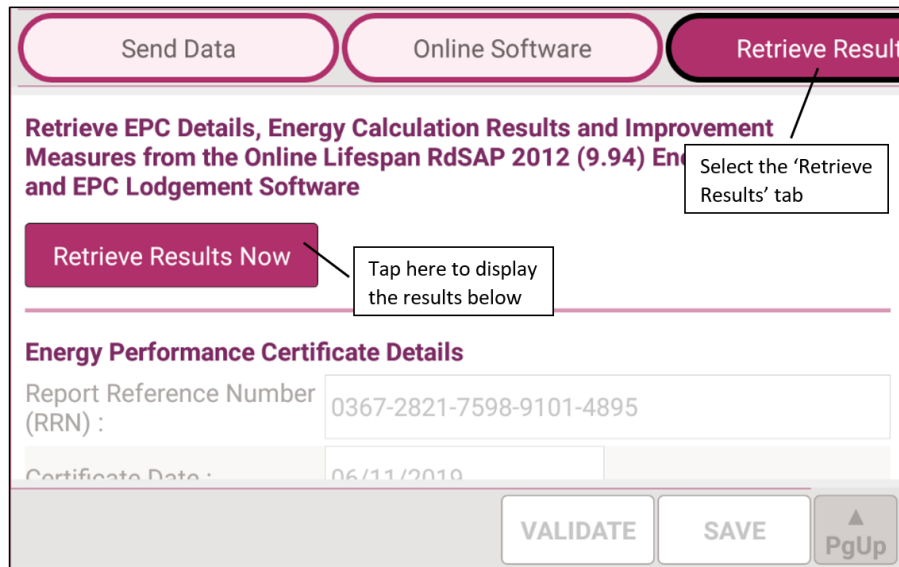


Figure 52: retrieve results

Scroll down the page to see the Energy Performance Certificate Details and Energy Calculation Results.

3.6.6 Update PCDF

The product characteristic data file provides the latest information on the product types data. It should be kept up to date to ensure the most accurate information is recorded in the assessment.

1. Tap 'Update PCDF'.
2. Tap 'Update'.

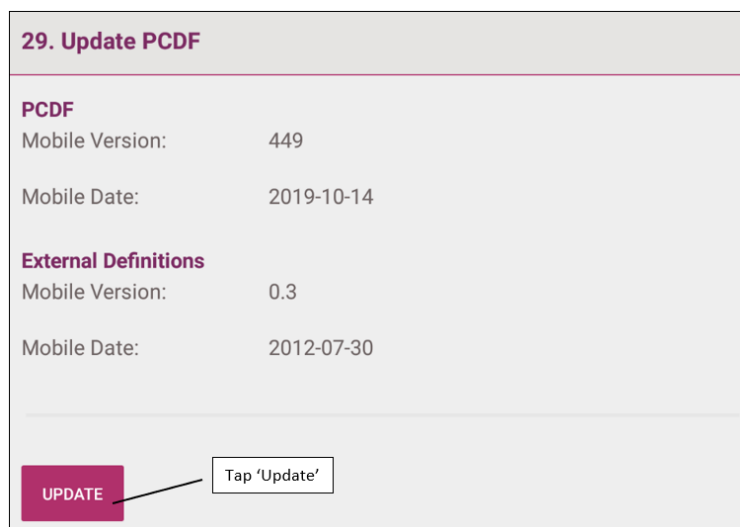


Figure 53: update PCDF

- Click 'Yes' to confirm the download, or 'No' to cancel.

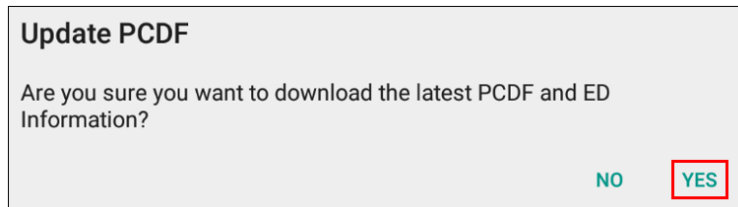


Figure 54: confirm download

Once the update is complete, details of the latest version downloaded will be displayed on the screen.

- To continue with the assessment, click into one of the sections from the navigation panel on the left.

3.6.7 Change Presets

The preset buttons throughout the assessment are set by default. This facility allows you to change these so your most popular answers can be assigned instead, potentially saving you time when completing the assessment.

- Tap 'Change Presets'.

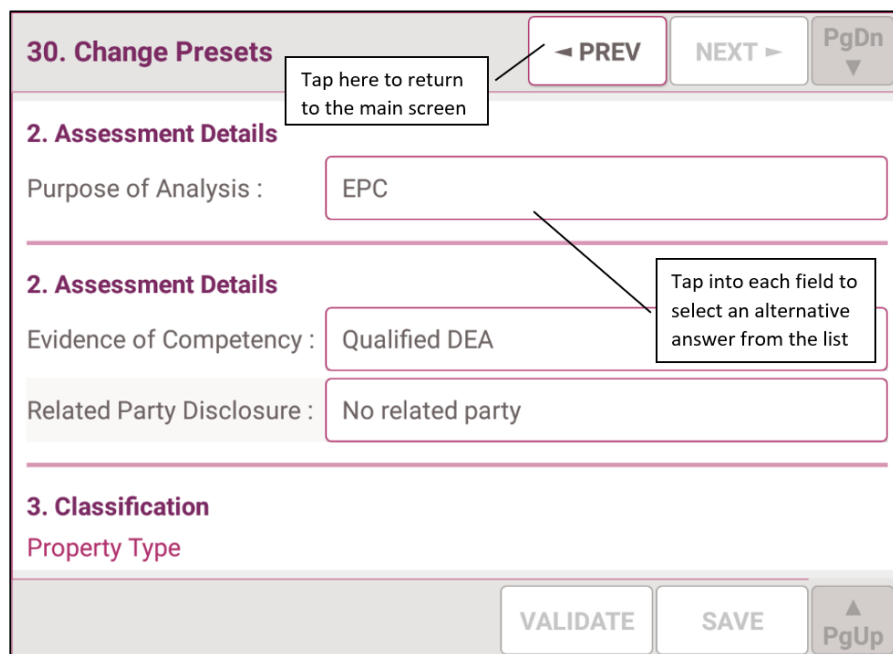
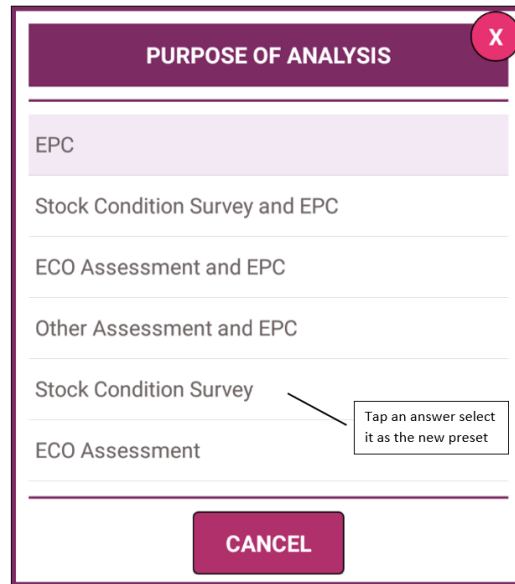


Figure 55: change presets

2. A list of questions will be displayed, alongside the current preset answer for each. Click into each of the fields where you want to amend the preset and select a new answer from the list.



3. Tap 'PREV' to return to the main screen, the answers selected will save automatically and become the new presets available in the assessment.

3.7 Completing the assessment

When you have completed each section and answered all the questions you are now ready to complete the assessment.

1. Tap on the 'Validate' button at the bottom of the screen.



Figure 56: validate energy assessment

- a. The validation results will list any errors. Return to the assessment to complete/amend the fields as required.

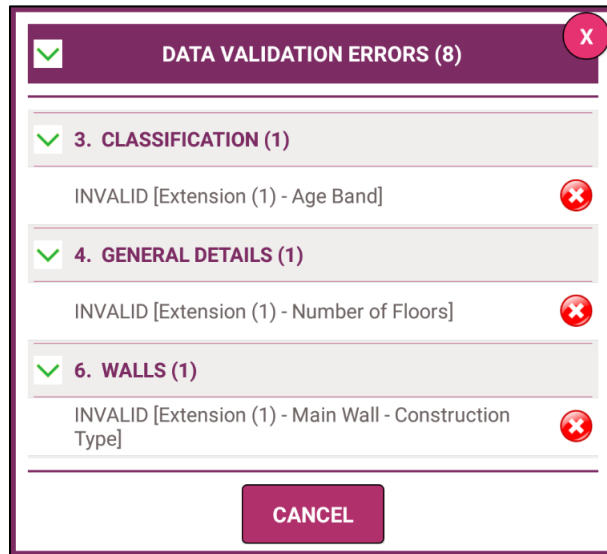


Figure 57: validation results with errors

- b. When no errors remain, the following validation results will be displayed.

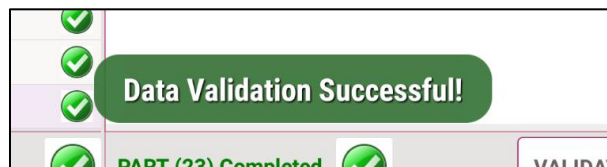


Figure 58: validation results without errors

2. Tap on the 'Save' button at the bottom of the screen.

NOTE If you do not Save the energy assessment and information you have entered will be lost when you close the screen.



Figure 59: save energy assessment

3. Please refer to section **3.6.5 Calculate Energy Ratings and Lodge EPC** for guidance on how to complete the lodgement on your device. To complete via desktop, return to the main screen and upload as normal before calculating and lodging the EPC.

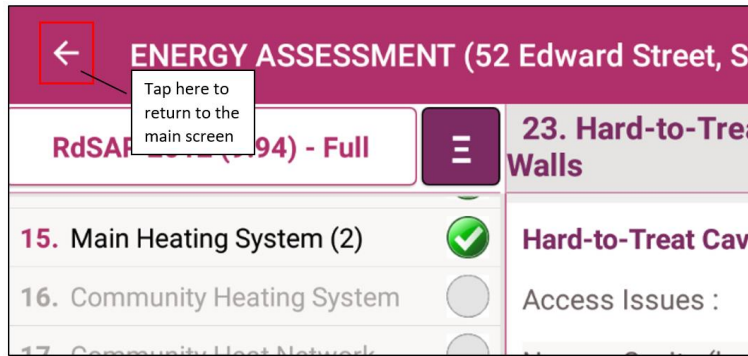


Figure 60: return to main screen

4. Housing Survey

1. Select the property you wish to add an assessment for and click 'Housing Survey'.

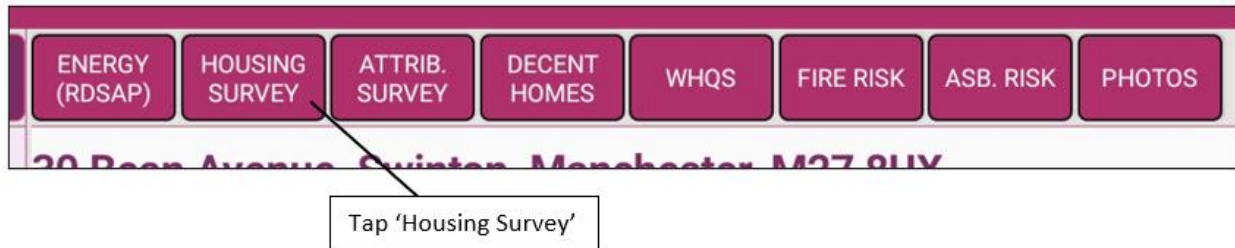


Figure 61: housing survey button

2. Any survey templates linked to your account will be listed, tap 'PAS2035 – Whole House Assessment' to open the retrofit survey.

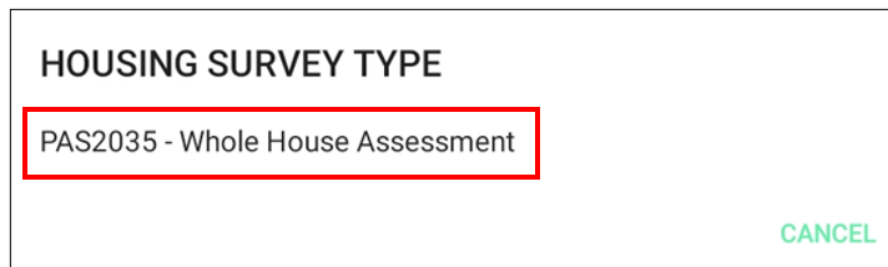


Figure 62: housing survey type

4.1 Layout

The layout of the housing survey screen is shown below.

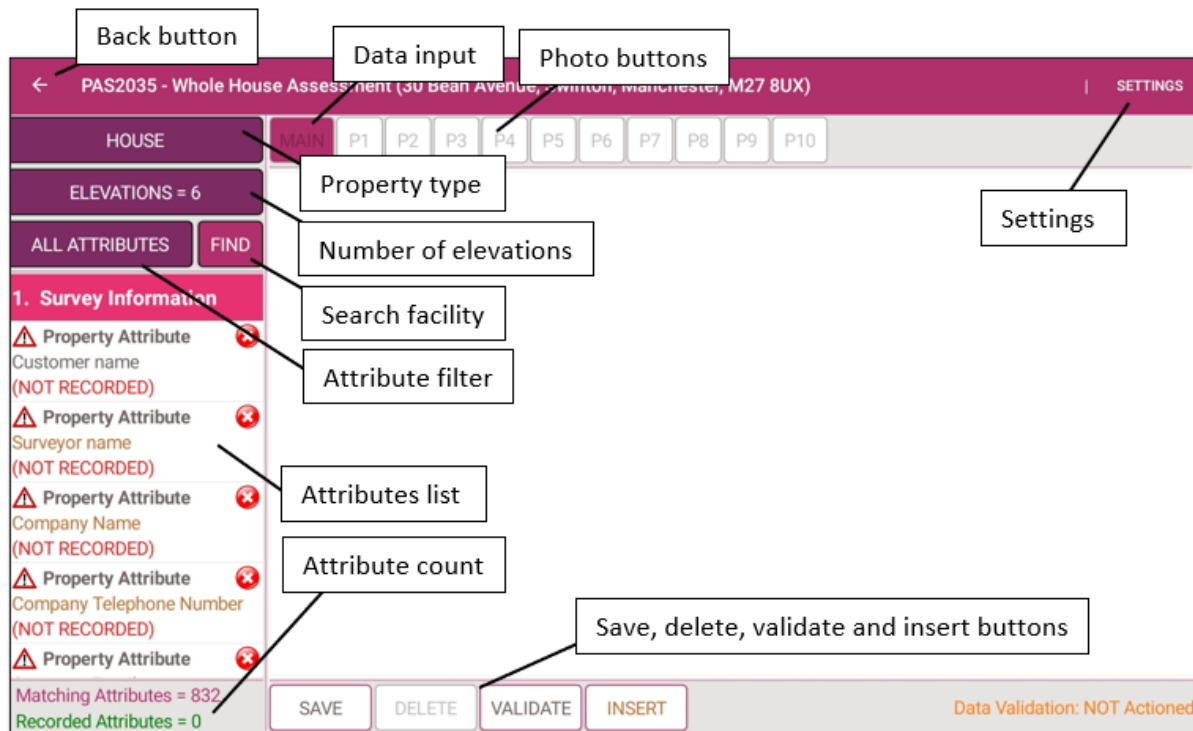


Figure 63: housing survey

- Back button – Tap this to return to the main screen.
- Data input – Tapping on the ‘Main’ button displays the attribute information on the main screen, enabling you to update the value and add any comments for the selected attribute.
- Photo buttons – You can attach up to 10 photographs to certain attributes. Tap ‘P1-P10’ to open the photographic record screen. A default number of photographs has been set per attribute; the photo buttons will be greyed out where an image is not required.
- Property type – Use this to select the property type of your address. This will affect the number of attributes required as this is a key factor in determining mandatory fields.
- Number of elevations - Use this to select the number of elevations present for your address. Once selected, this will update the attributes list so you only have to input data for the relevant number of elevations.
- Attribute list – This is the list of attributes that can be added to the property. Attributes in green are already recorded against the property and attributes not currently recorded against the property have **(NOT RECORDED)** next to them. This is also represented by a green tick or red cross next to the description. Mandatory questions are marked with an exclamation mark hazard symbol.

- Attribute count – This tells you how many attributes are present and the number currently recorded against the property.
- Save, Delete, Validate and Insert buttons – Tap on the relevant button to either save or delete an attribute, validate the survey or insert data from other modules.
- Settings – This brings up the settings menu, allowing you to show or hide non-core items, exterior and interior house filter buttons, property type and elevation buttons and change the font size.

4.2 Inputting survey data

4.2.1 Setting a Property Type

The property type is a key factor in determining the number of attributes collected during the survey so it is important this field is set prior to completing the assessment.

1. By default the property type is set to 'House', to change this, click on the description in the top left of the screen to bring up the full list of options. Tap to select the appropriate property type.

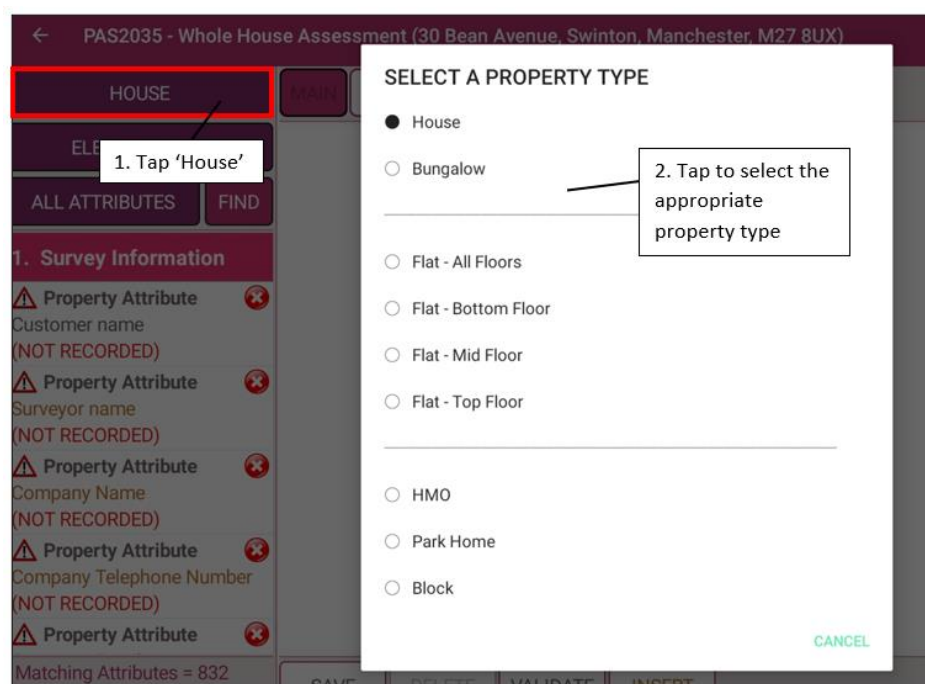


Figure 64: select a property type

Once selected, the attributes list will be updated to show just the relevant questions for the property type chosen.

4.2.2 Selecting the number of elevations

As part of the retrofit survey, data is collected for each elevation to satisfy requirements at the design stage of the project. Underneath the property type, the elevations button shows how many elevations are required for the address. Again, this has an impact on the number of attributes required for the survey.

- By default the survey is set at the maximum of 6 elevations, to change this, click on the description in the top left of the screen to bring up the options. Tap to select the appropriate number of elevations.

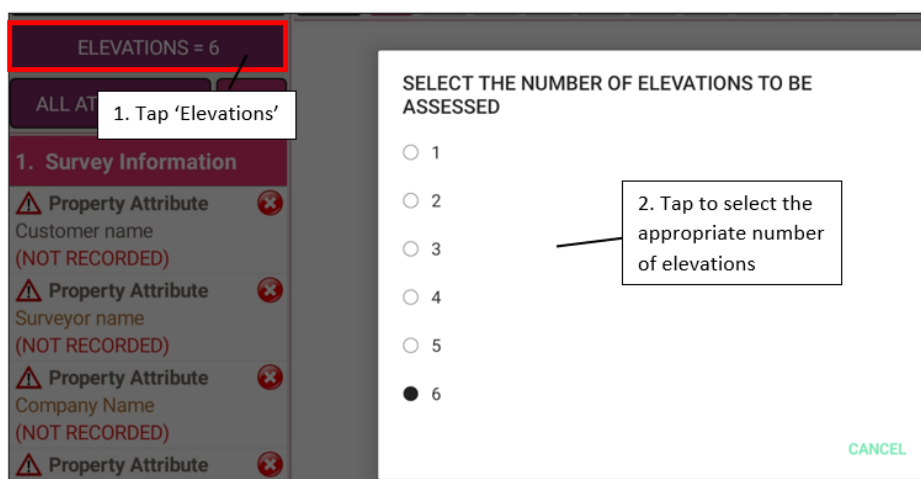


Figure 65: select the number of elevations

Once selected, the attributes list will be updated to show just the relevant questions for the number of elevations chosen.

4.2.3 Using the insert function

On the main screen within the housing survey you will see an 'Insert' button. This has been added into the software to aid the inputting process and for data consistency between modules.

Any attributes which have the potential to be populated via the insert button are shown in brown text, any using black text will have to be updated manually as part of the survey.



Figure 66: attributes list text format

There are three separate options to select at different stages of the survey.

1. Tap on the first option to insert linked values, these are taken from the energy data, occupancy assessment and application setting. This should be completed before updating any fields within the assessment.

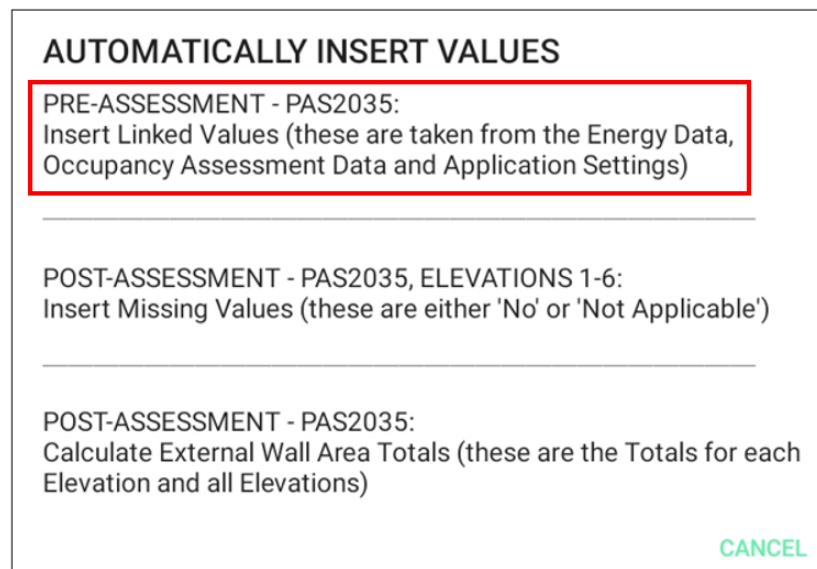


Figure 67: automatically insert values: insert linked values

2. Click 'Yes' to continue.
3. A confirmation box will display the number of inserted values. Click 'OK' to return to the survey.

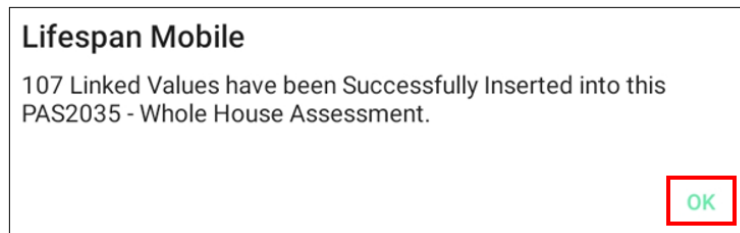


Figure 68: confirmation: insert linked values

NOTE In order for the relevant fields to be populated, you must first complete the energy and occupancy assessments. The 'application settings' refer to the mandatory attributes collected when updating the property details. Please refer to sections **3. Energy Survey** and **2.2 Editing a property** for guidance on updating the information required.

4. Tap on the second option to insert missing values for the detailing sections of each elevation, this should be done after the survey is completed. First update the survey with any details present at the property, you can then select this post-assessment insert option to populate the remaining detailing questions with no or not applicable as required.

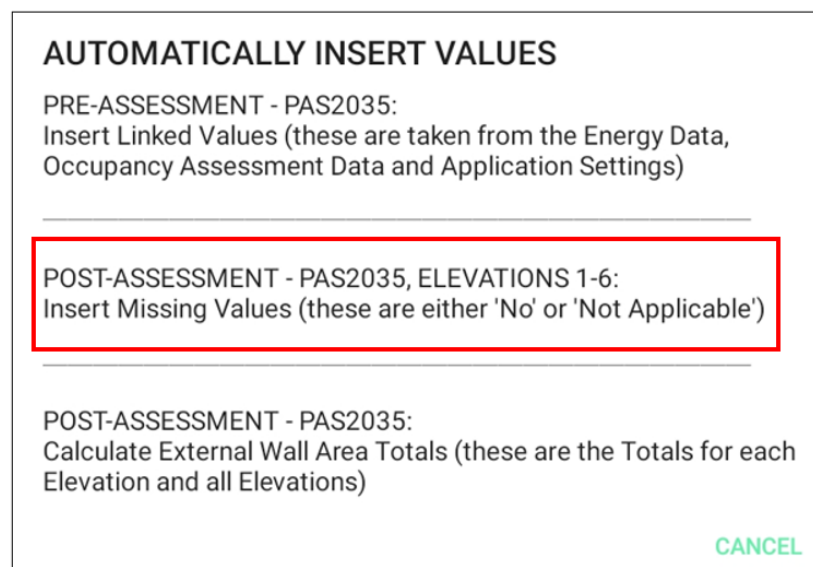


Figure 69: automatically insert values: insert missing values

5. Click 'Yes' to continue.
6. A confirmation box will display the number of inserted values. Click 'OK' to return to the survey.

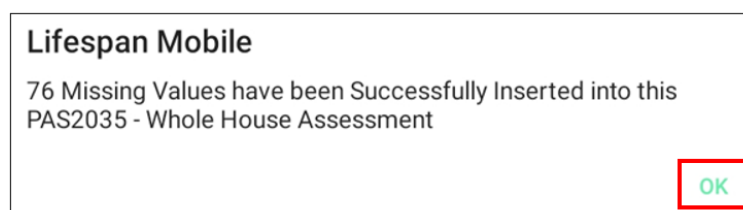
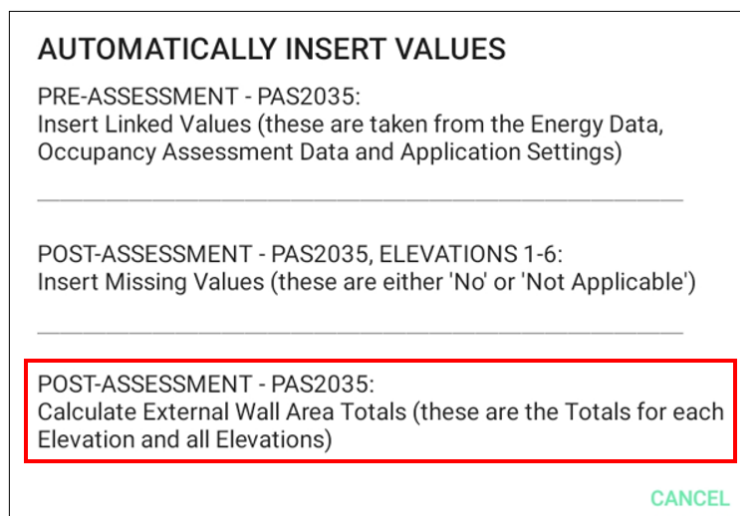


Figure 70: confirmation: insert missing values

NOTE The number of values inserted here is dependent on the number of elevations selected at the beginning of the survey. Ensure the elevation number selected is correct or you may have partial data against an elevation that does not exist, which will need to be deleted when the survey information is reviewed on upload.

7. Tap on the third option to calculate the external wall area totals, this should be done after the survey is completed.

Within the elevation sections, there are attributes to collect the 'Area to be insulated' for each wall type. This is more relevant for properties with multiple wall types per elevation, however if you update these areas, you can then use this insert button to populate the attribute 'Elevation – External Wall area to be insulated (m²)'. The software will combine all the areas to complete the total to ensure data consistency in the survey.



AUTOMATICALLY INSERT VALUES

PRE-ASSESSMENT - PAS2035:
Insert Linked Values (these are taken from the Energy Data,
Occupancy Assessment Data and Application Settings)

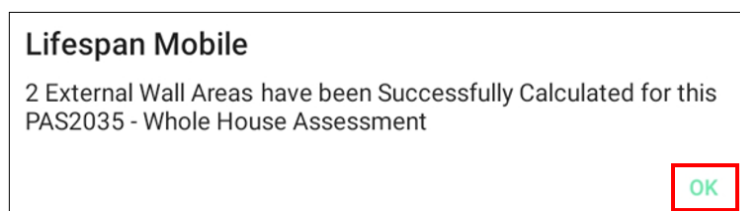
POST-ASSESSMENT - PAS2035, ELEVATIONS 1-6:
Insert Missing Values (these are either 'No' or 'Not Applicable')

POST-ASSESSMENT - PAS2035:
Calculate External Wall Area Totals (these are the Totals for each
Elevation and all Elevations)

CANCEL

Figure 71: automatically insert values: calculate external wall area totals

8. Click 'Yes' to continue.
9. A confirmation box will display the number of inserted areas. Click 'OK' to return to the survey.



Lifespan Mobile

2 External Wall Areas have been Successfully Calculated for this
PAS2035 - Whole House Assessment

OK

Figure 72: confirmation: calculate external wall areas

4.2.4 Inputting the survey data

Once the property type, number of elevations and pre-assessment data has been inserted, you can work through the assessment by selecting an attribute from the list and entering the applicable value in the

field provided on the main screen. The values are entered either via a drop-down list, radio button, calendar or free-text options. Additional comments can be added against any attribute.

1. Select an attribute from the list on the left. The attribute name will be displayed on the main screen and below a value field.
 - For pick-list items, tap on the value field to open the drop-down list and tap to select your answer.

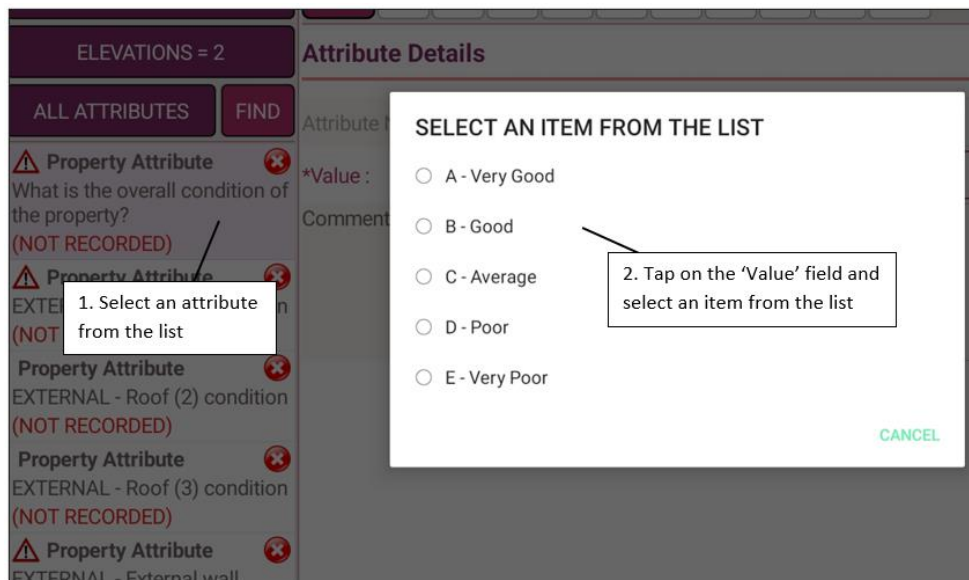


Figure 73: pick-list values

- Radio buttons are used for yes/no question types. By default the slider is to the left and greyed out to represent 'No'. Tap 'Save' to apply this value or tap on the button to move the slider to the right and highlight in green to represent 'Yes'.

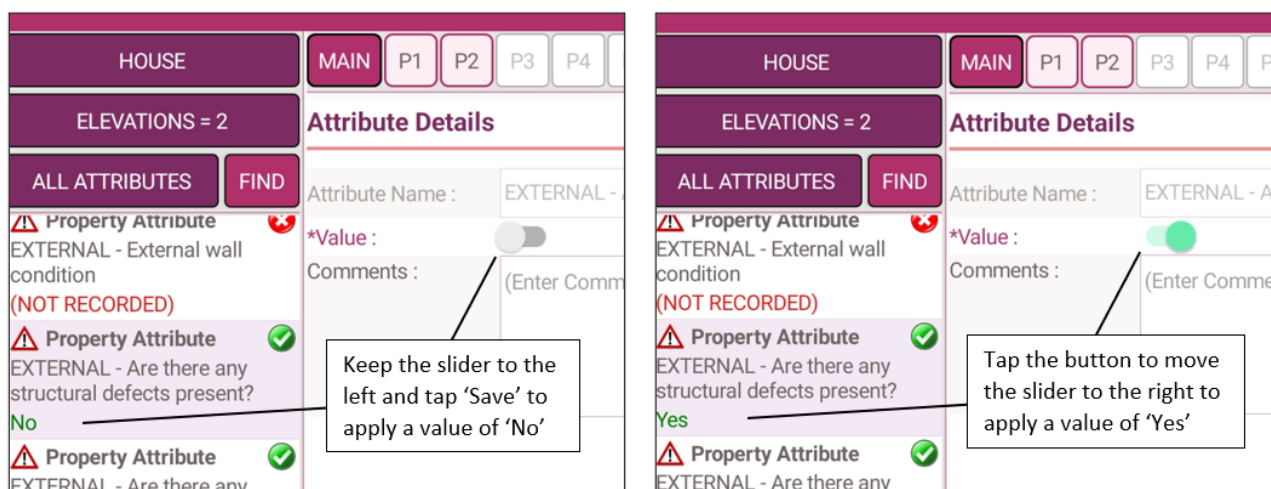


Figure 74: radio button values

- Attributes requiring a date value will give you an option of either tapping the 'Today' button to update automatically to the current date, or you can select a date from the calendar function by tapping in the value field.

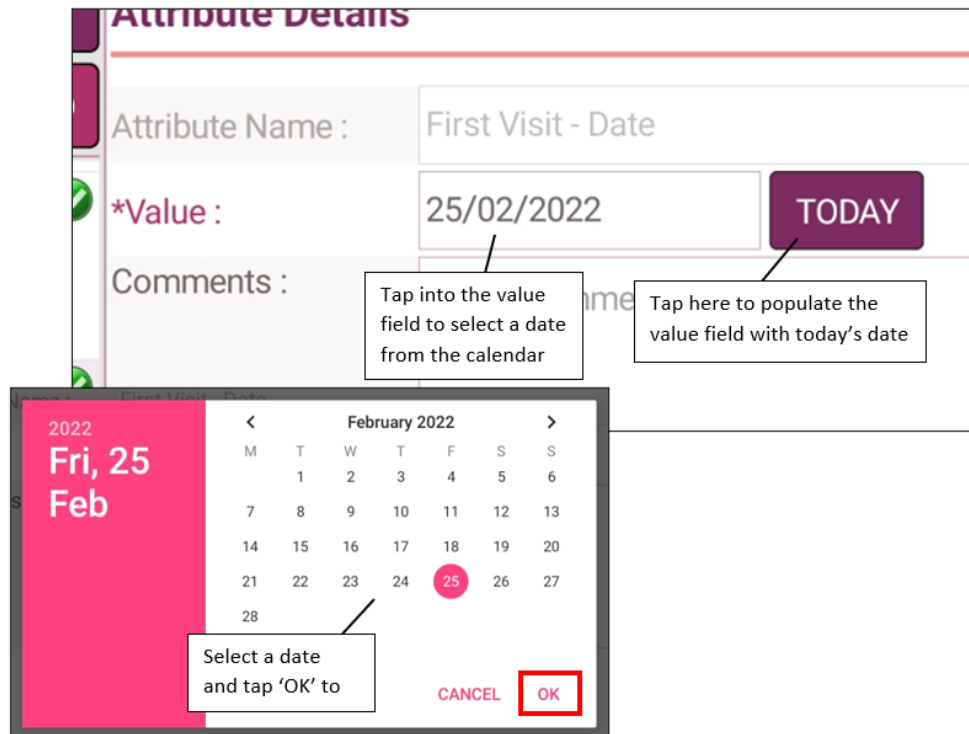


Figure 75: date values

- To input free-text values, tap on the value field and use the keyboard provided to enter the description.

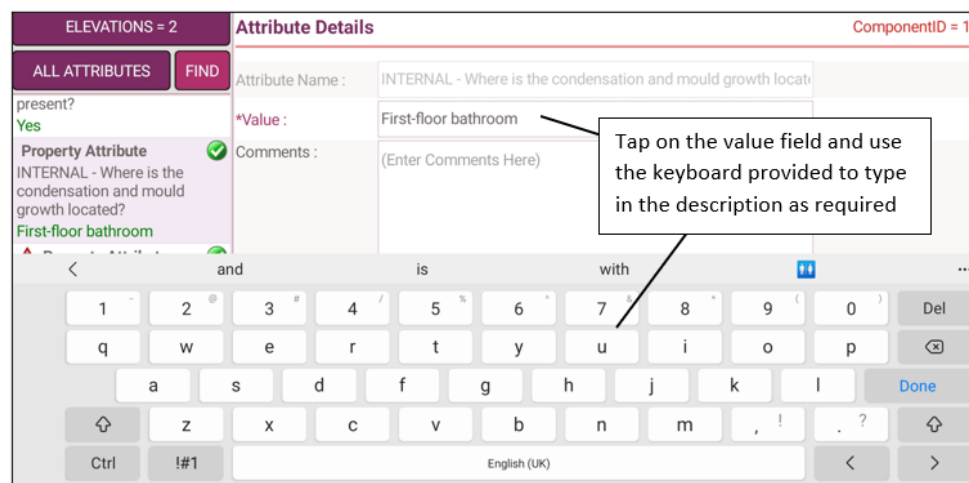


Figure 76: free-text values

- You can add comments to any of the attributes by tapping in the comments box below the value field and using the keyboard provided to type in your notes.

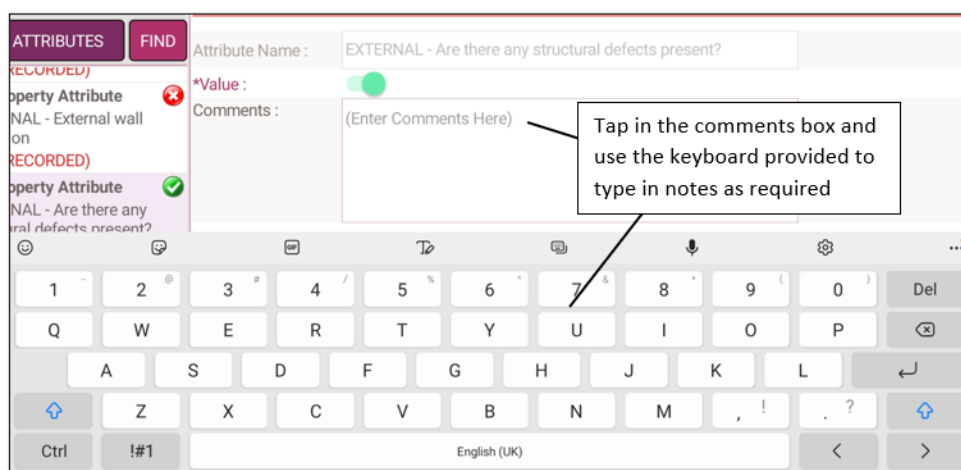


Figure 77: attribute comments

4.2.5 Attaching photographs within the survey

You can attach up to ten photographs to an individual attribute. The number of photographs you are able to attach to any given attribute has been built into the survey template and the P1-P10 buttons at the top of the screen are used to open the photographic record screen. These buttons will be greyed out where an image is not required.

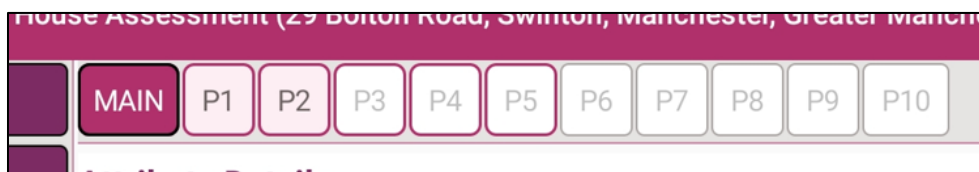
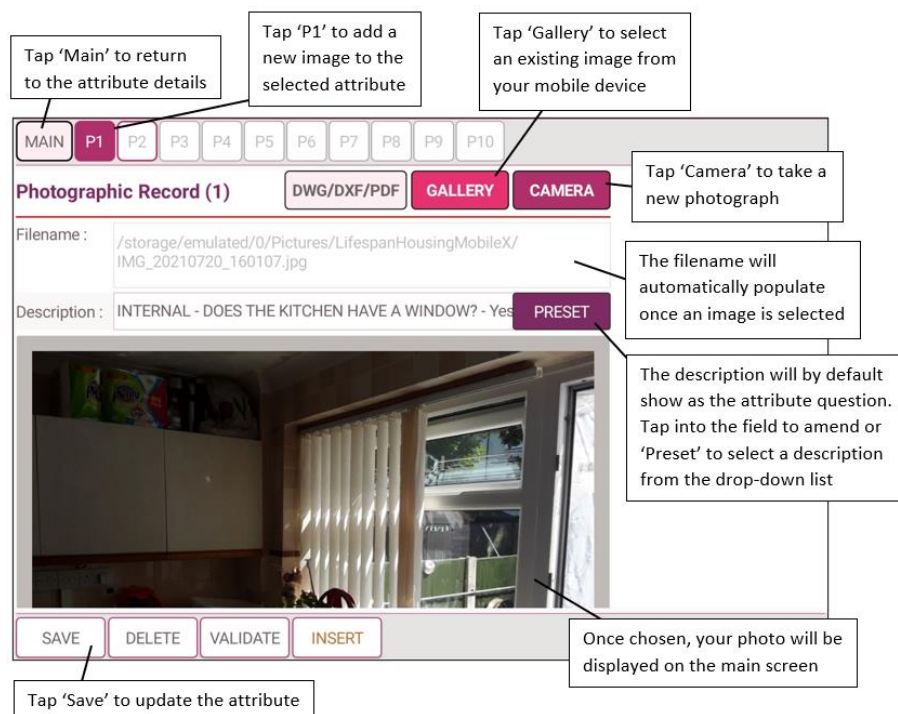


Figure 78: photo buttons

To add a photograph, select the attribute and tap P1. You have the option to attach either an existing photograph (tap 'gallery' and choose the image from your photos) or to take a new photograph (tap 'camera' to open the camera on your device to take an image).

The filename will auto-populate once an image is selected. The description will also be pre-loaded with to show the attribute name however this can be overwritten if required (either tap into the field and type in a new description or tap on preset to select an option from the drop-down list).

Repeat the steps above to take additional photographs, as previously noted you are restricted on the number of images you can attach dependent on the attribute. If further photographs are required, these can be collected in the photo module - please refer to section 10. **Photographs** for guidance on how to use this module.



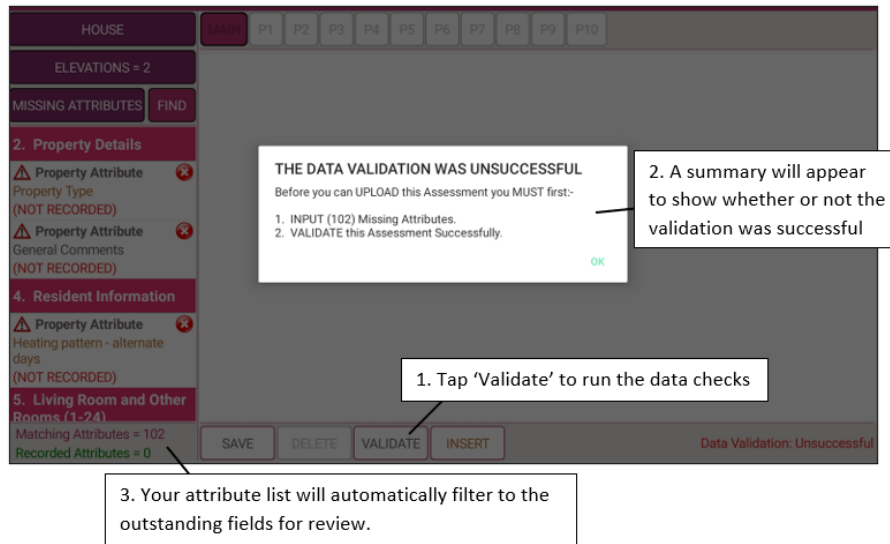
NOTE The delete button at the bottom of the screen is linked to the attribute and will remove any information recorded against it if selected, not just the image. If you need to delete a photograph this can be done from the photograph module, please refer to section **10.4 Deleting a photograph** for guidance on how to remove an existing image.

4.2.3 Using the validate function

Once the housing assessment has been completed, the 'Validate' button should be used to complete a data check prior to upload. The software will look for any incomplete fields based on the set criteria and highlight these for review.

Tap on the 'Validate' button at the bottom of the screen to run the data checks. Once complete, a summary will show on the main screen to show the outcome and your attribute list on the left will automatically filter to the outstanding fields. Tap 'OK' to close the summary and work through the attributes before re-attempting the validation.

NOTE The recorded data will still upload even if the validation is showing as unsuccessful. This stage has been included in order to reduce the number of data queries once uploaded to Lifespan however fields can be left blank if they are not applicable to your survey.



5. Attribute Survey

5.1 Access

1. Select the property you wish to add property attributes and works to and click AS (Attribute Survey)

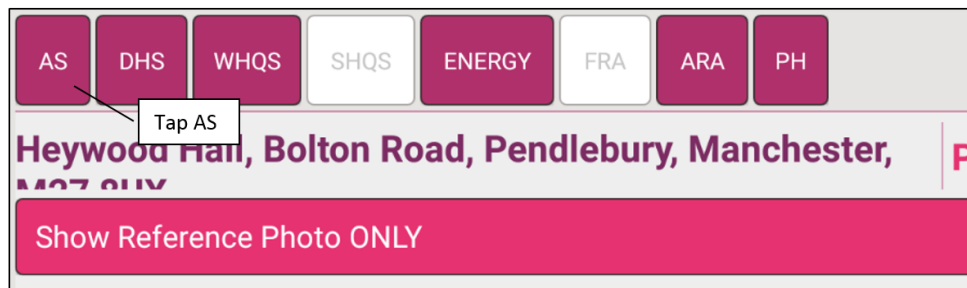


Figure 79: attribute survey

5.2 Layout

1. The layout of the default attribute survey screen is shown below.

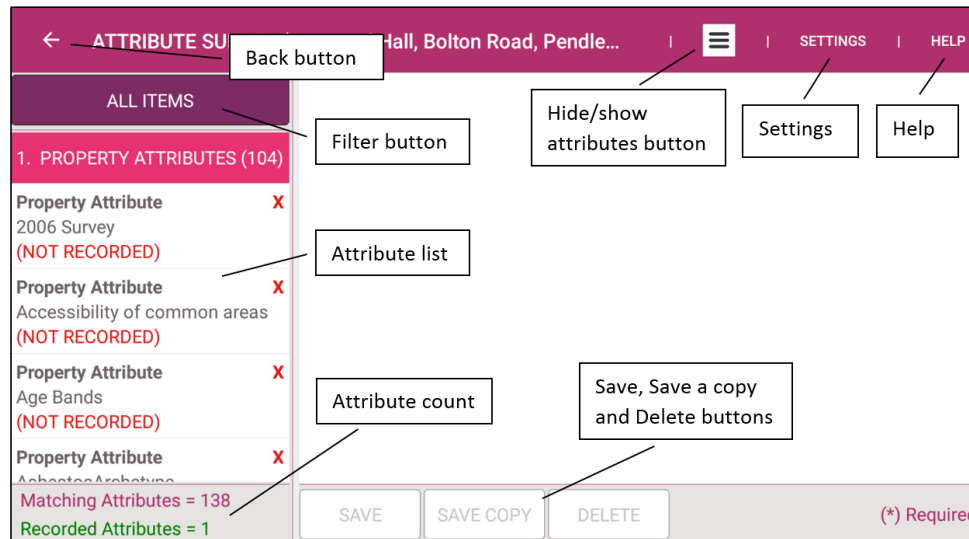


Figure 80: attribute survey screen layout

- Back button – Tap this to return to the main screen.
- Filter button – Use this to filter between Property Attributes and Building Components (Planned Maintenance). You can also filter Building Components by category.
- Attribute list – This is the list of attributes that can be added to the property. Attributes in green are already recorded against the property and attributes not currently recorded against the property have **(NOT RECORDED)** next to them.
- Attribute Count – This tells you how many attributes are recorded against the property.
- Save, Save a copy and Delete buttons – The buttons are used to save, or delete attributes.
- Hide/show attributes button – This is used to either hide or show the attributes on the left of the screen. Tap once to hide the attribute list and again to bring up the list.
- Settings – This brings up the settings menu, allowing you to sort items alphabetically, show non-core items, show non-essential information, use continuous selection mode, change the font size and change the background opacity.
- Help – This brings up a copy of the mobile manual.

5.3 Property Attributes

1. To select property attributes and tap where it says ALL ITEMS.

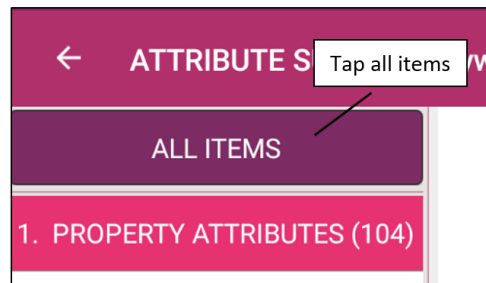


Figure 81: all items filter button

2. Select All Property Attributes from the menu.
3. Tap on an attribute you wish to add or edit in the attribute list.
4. Tap on the value.

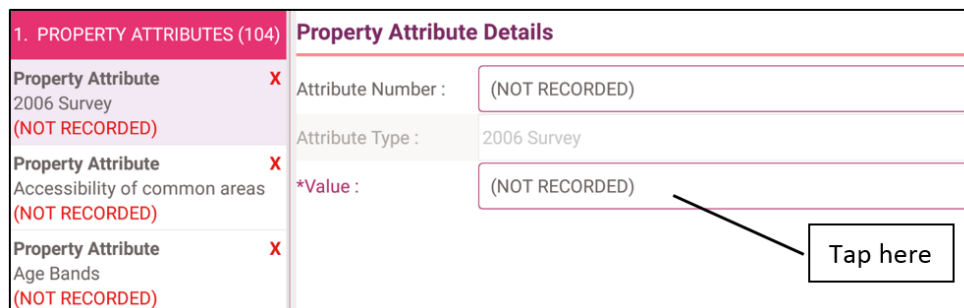


Figure 82: entering a value

5. Select a value from the list.

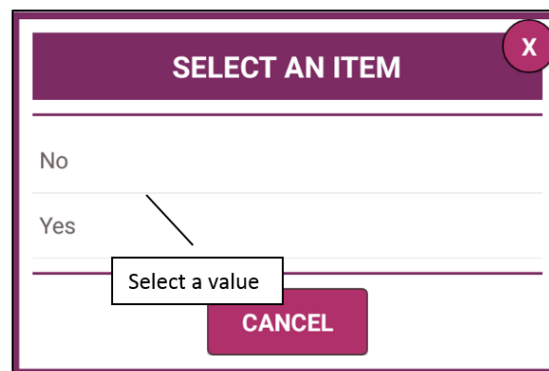
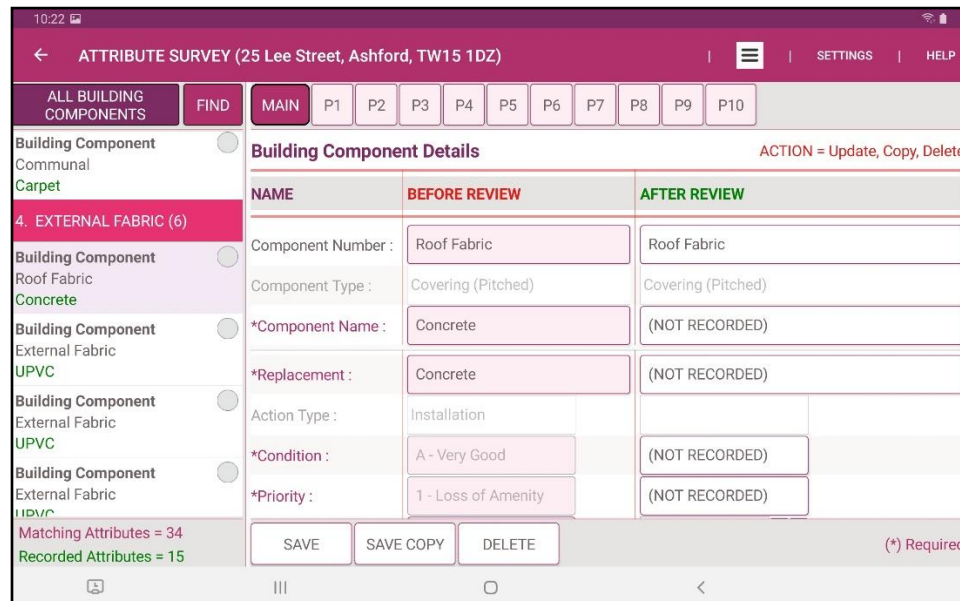


Figure 83: select an item

6. Click Save.
7. Repeat steps 3 to 6 until you have recorded all the required attributes.
8. If you are collecting information on an attribute that already exists in the Lifespan, then you will be offered a side-by-side view of the information. On the Left-hand side you will see the

information that Lifespan already holds. On the right-hand side you should enter what you want the information to be.



If you agree with the information that was previously collected, you can tap on the red field boxes on the left-hand side to copy the data to the afterview on the right-hand side without having to select from drop down values.

9. If you do not agree with the existing data, then in the right-hand side you can select the values that you want from the dropdown lists that activate when you click on a field in the Right-hand columns.
10. Once you press save the data on the right-hand side will replace the data that is stored on the left-hand side. **NOTE: DATA ON THE LEFT-HAND SIDE WILL BE OVERWRITTEN AND NOT VISIBLE IF YOU CLICK BACK TO THAT COMPONENT AT A LATER DATE.**

5.4 Building Components (Planned Maintenance)

1. To select property attributes, tap where it says ALL ITEMS. See

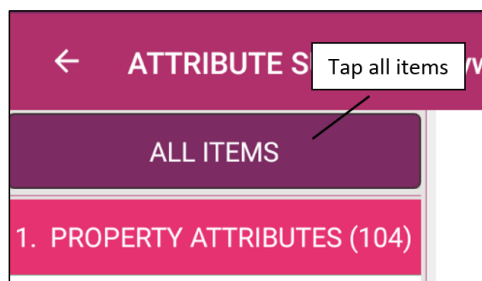


Figure 81.

2. Select All Building Components from the menu.

3. Tap on an attribute you wish to add or edit in the attribute list.
4. Tap on the component name.

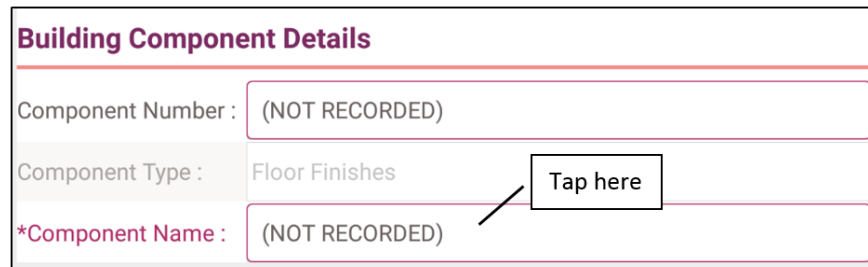


Figure 84: entering a component name

5. Select the existing building component.

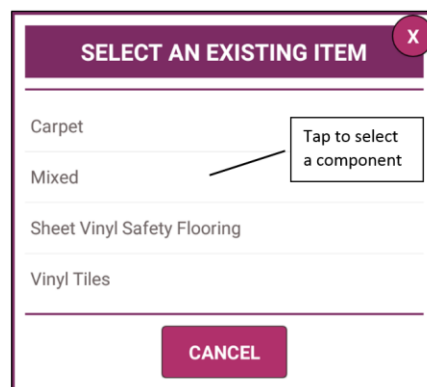


Figure 85: select a component

6. Select the replacement component.



Figure 86: select replacement component

7. Select the condition.
8. Select the priority.
9. Select the quantity.

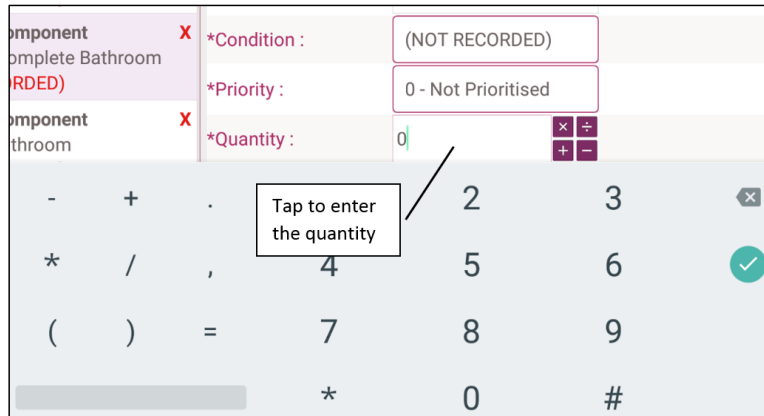
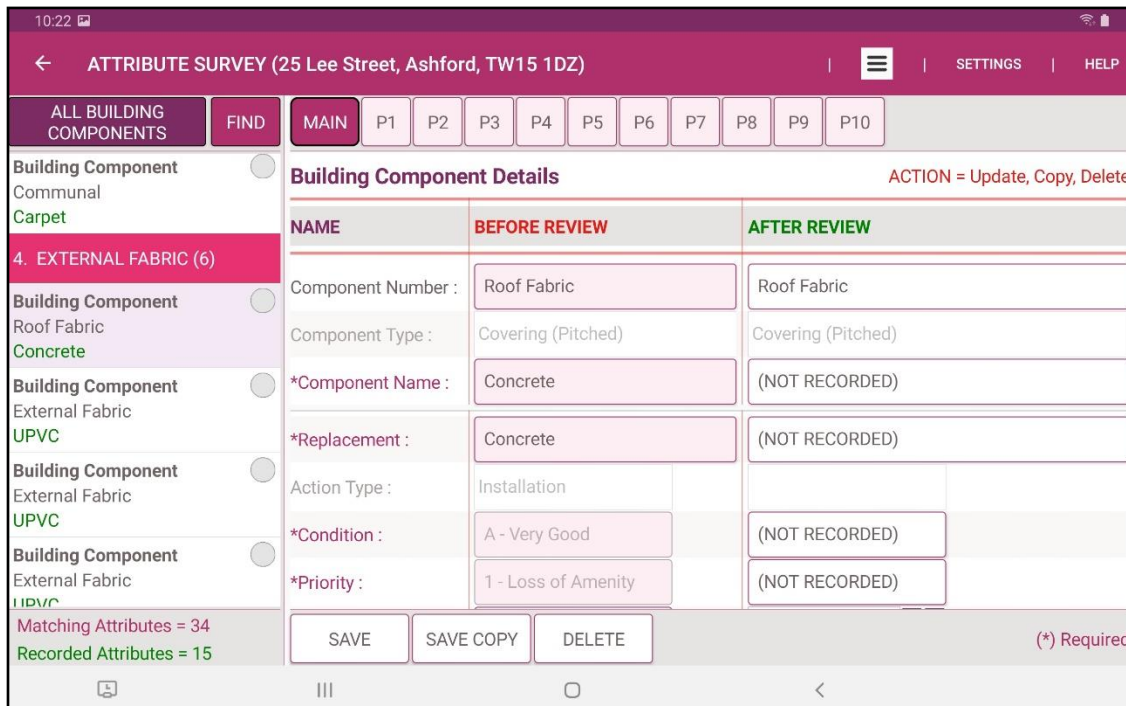


Figure 87: enter the quantity

10. Tap Save.
11. Repeat steps 3 to 6 until you have recorded all the required attributes.
12. If you are collecting information on an component that already exists in the Lifespan, then you will be offered a side-by-side view of the information. On the Left-hand side you will see the information that Lifespan already holds. On the right-hand side you should enter what you want the information to be.



13. If you agree with the information that was previously collected, you can tap on the red field boxes on the left-hand side to copy the data to the afterview on the right-hand side without having to select from drop down values.

14. If you do not agree with the existing data, then in the right-hand side you can select the values that you want from the dropdown lists that activate when you click on a field in the right-hand columns.
15. If the work has been marked as completed previously in Lifespan, then the completed works switch on the bottom of the left-hand panel will be green. This indicates that the completion date is an actual date not an estimate based on condition. Assessors should be careful of entering a data of next replacement less than this figure as they would be shortening the effective life of the component. In the instance of completed works the completion date and condition cannot be copied from the Before view to the After. They must be entered by the surveyor with due consideration of the completed works.



The screenshot shows a mobile application interface for a component record. On the left, there is a list of components with two entries labeled 'Component' and 'bric'. Below the list, there are two attribute counts: 'Attributes = 34' in red and 'Attributes = 15' in green. The main area displays a form for a selected component with the following fields:

- Component Life: 50
- Completion Date: 21/01/2070
- Work Completed: A toggle switch that is currently turned on (green).

At the bottom of the form, there are three buttons: 'SAVE', 'SAVE COPY', and 'DELETE'. To the right of the Completion Date field, there is a purple button with a white '+ -' symbol.

16. Once you press save the data on the right-hand side will replace the data that is stored on the left-hand side.

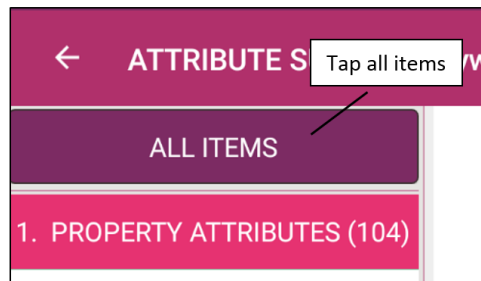
NOTE Data on the 'before' view will be overwritten once the 'after' view is updated. If you return to the component again during the survey the old data will no longer be visible.

5.5 Filtering attributes

Rather than scrolling through a continuous list of property attributes or building components, you can apply one of the filters below:

- Main Filters
 - All items
 - All property attributes
 - All building components
- Building Component Filters
 - These will be dependent on the components linked to the property.
- Other Filters
 - All recorded items
 - All unrecorded items
 - All non-core items

1. To select a filter, tap where it says ALL ITEMS. See figure 60.



2. Select the required filter.

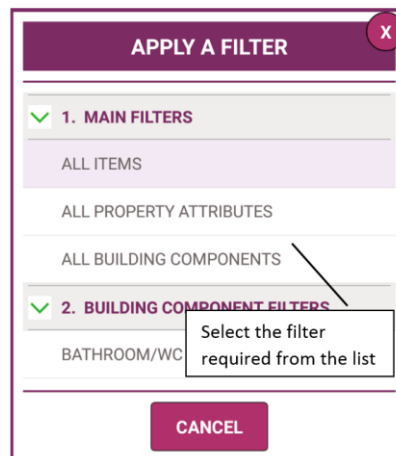


Figure 88: apply a filter

3. To show all items again, repeat step 1 and select ALL ITEMS.

5.6 Copying an attribute

In some circumstances there may be a requirement to have two attributes with the same name, for example if a property has one wooden window and a number of UPVC windows.

1. Enter the first component, for example Windows (Casement) and tap SAVE.
2. Change the component number.

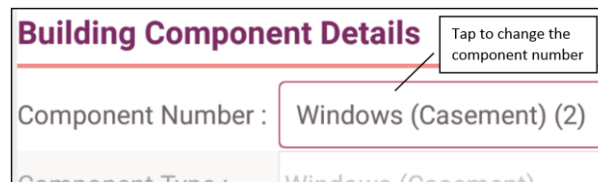


Figure 89: building component details

3. Tap SAVE COPY.

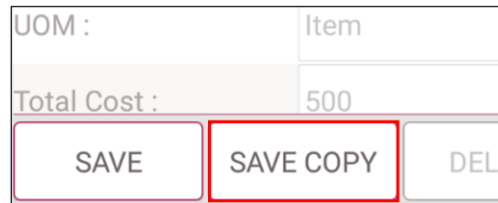


Figure 90: save copy

4. Make the required changes to the component, replacement component, condition, priority and quantity

5. Tap Save

5.7 Deleting an attribute

1. Tap the attribute you wish to delete in the attribute list
2. Tap Delete
3. Tap Yes at the prompt

6. Decent Homes Assessment

6.1 Access

1. Select the property you wish to add a decent homes assessment to and click DHS (Decent Homes Survey).

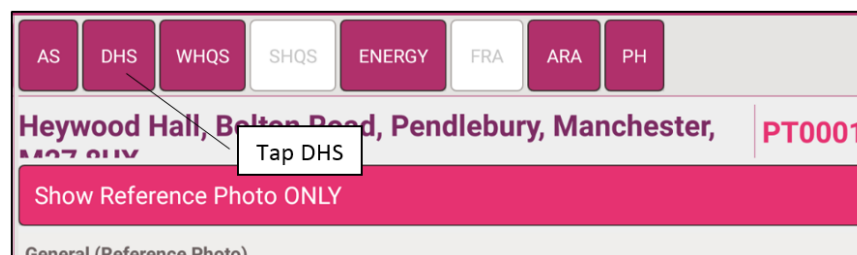
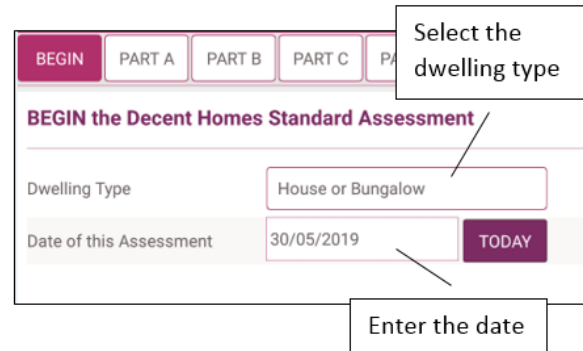


Figure 91: opening DHS

6.2 Adding and editing assessments

1. In the Begin tab select the correct dwelling type from the drop down and use the calendar tool to enter the date of the assessment. Pressing the Today button will set the assessment date to the current date.



BEGIN PART A PART B PART C PA
BEGIN the Decent Homes Standard Assessment
 Dwelling Type: House or Bungalow
 Date of this Assessment: 30/05/2019 TODAY
 Select the dwelling type
 Enter the date

Figure 92: begin assessment

When you are ready to proceed to the next stage of the assessment click Part A.

2. Tap where it says NOT RECORDED next to question 1 and select a value from the menu.



Hazard Type	Risk (Indicative)	Score
PHYSIOLOGICAL REQUIREMENTS		
Hygrothermal Conditions		
1. Damp and Mould Growth	(NOT RECORDED)	0
2. Excess Cold	(NOT RECORDED)	0
3. Excess Heat	(NOT RECORDED)	0

BEGIN PART A PART B PART C PART D FINISH
PART A : Does the Dwelling Comply with the Housing Health and Safety Rating System (HHSRS)?
 Tap here and select a value
 APPLY TO ALL

Figure 93: Part A

3. Rather than answering each Part A question separately you can tap on APPLY TO ALL then make changes to individual questions accordingly.



PART A : Does the Dwelling Comply with the Housing Health and Safety Rating System (HHSRS)?

Hazard Type	Risk (Indicative)	Score
PHYSIOLOGICAL REQUIREMENTS		
Hygrothermal Conditions		
1. Damp and Mould Growth	2 - Typical	0
2. Excess Cold	(NOT RECORDED)	0
3. Excess Heat	(NOT RECORDED)	0

Buttons: BEGIN, PART A, PART B, PART C, PART D, FINISH. Callout: Tap apply to all. Button: APPLY TO ALL.

Figure 94: apply to all

When you have answered all the questions in Part A, tap on Part B to proceed to the next stage of the assessment.

4. Tap where it says NOT RECORDED next to question 1 and select a value from the menu.




PART B : Is the Dwelling in a Reasonable State of Repair?

Component Name	Age (Years)	Poor	Works	Cost
KEY COMPONENTS				
APPLY (1. WALL STRUCTURE) TO ALL COMPONENTS				
1. Wall Structure	5	(NOT RECORDED)	(NOT RECORDED)	£0
2. Wall Finish	(NOT RECORDED)	<input type="checkbox"/>	(NOT RECORDED)	£0
3. Roof Structure	(NOT RECORDED)	<input type="checkbox"/>	(NOT RECORDED)	£0

Buttons: BEGIN, PART A, PART B, PART C, PART D, FINISH. Callout: Tap here and select a value.

Figure 95: Part B

5. Tap the Poor button If a component is poor condition. It will change colour to green when selected.



PART B : Is the Dwelling in a Reasonable State of Repair?

Component Name	Age (Years)	Poor	Works	Cost
KEY COMPONENTS				
APPLY (1. WALL STRUCTURE) TO ALL				
1. Wall Structure	5	<input checked="" type="checkbox"/>	(NOT RECORDED)	£0
2. Wall Finish	(NOT RECORDED)	<input type="checkbox"/>	(NOT RECORDED)	£0
3. Roof Structure	(NOT RECORDED)	<input type="checkbox"/>	(NOT RECORDED)	£0

Buttons: BEGIN, PART A, PART B, PART C, PART D, FINISH. Callout: Tap here if component is in a poor condition.

Figure 96: component in poor condition

6. Rather than answering each Part B question separately you can tap on APPLY TO ALL then make changes to individual questions accordingly.

Component Name	Age (Years)	Poor	Works	Cost
KEY COMPONENTS				
APPLY (1. WALL STRUCTURE) TO ALL COMPONENTS				
1. Wall Structure	5	<input type="checkbox"/>	(NOT RECORDED)	£0

Figure 97: apply to all

When you have answered all the questions in Part B, tap on Part C to proceed to the next stage of the assessment.

- The questions in Part C are all 'Yes' or 'No' answers. Tap the button to change an answer to 'No'. The button will change colour to grey when the answer is no.

PART C : Does the Dwelling have Reasonably Modern Facilities and Services?				
Facility Name	(N/Y)?	Works	Cost	
1. Is the Kitchen Reasonably Modern (20 Years Old or Less)?	<input checked="" type="checkbox"/>	(NOT RECORDED)	£0	APPLY TO ALL

Figure 98: Part C

- Rather than answering each Part C question separately you can tap on APPLY TO ALL then make changes to individual questions accordingly. When you have answered all the questions in Part C, tap on Part D to proceed to the next stage of the assessment.
- Tap where it says NOT RECORDED next to question 1 and select a value from the menu.

PART D : Does the Dwelling Provide a Reasonable Degree of Thermal Comfort?				
Element Name	Element Type	Works	Cost	
1. Heating System	(NOT RECORDED)	(NOT RECORDED)	£0	
2. Wall Type	(NOT RECORDED)	(NOT RECORDED)	£0	
3. Roof Insulation	(NOT RECORDED)	(NOT RECORDED)	£0	

Figure 99: Part D

- Answer each question in Part D using the same method.

PART D : Does the Dwelling Provide a Reasonable Degree of Thermal Comfort?				
Element Name	Element Type	Works	Cost	
1. Heating System	A1 - Gas/Oil Central Heating System	(NOT RECORDED)	£0	
2. Wall Type	B3 - Solid Wall - Insulated	(NOT RECORDED)	£0	
3. Roof Insulation	C3 - 50-150mm	(NOT RECORDED)	£0	

Figure 100: complete questions

- Tap Calculate. The Lifespan Mobile will now calculate the assessment.

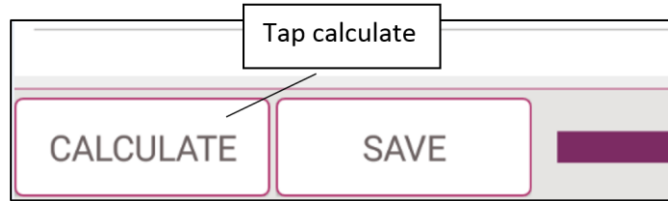


Figure 101: calculate the assessment

12. Tap OK to close the notification pop up

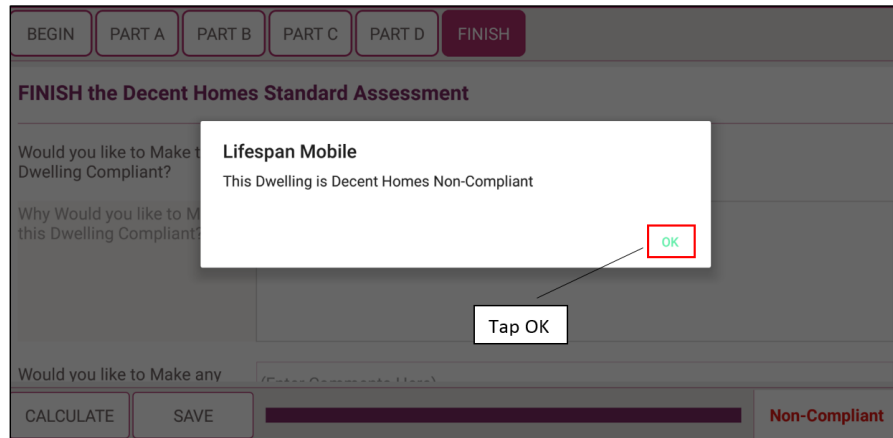


Figure 102: calculated assessment

13. Tap on Finish to finalize the assessment. If the dwelling is non-compliant you have the option to override this and make the dwelling compliant. If you chose to do this, you must also enter a reason for doing so.

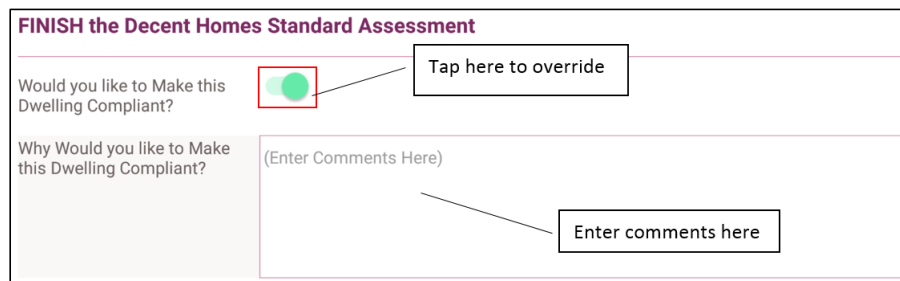


Figure 103: finish the decent homes assessment

14. You can add additional comments regarding the assessment if you wish.



Figure 104: additional comments

15. Click Save. The software will return to the property address list.

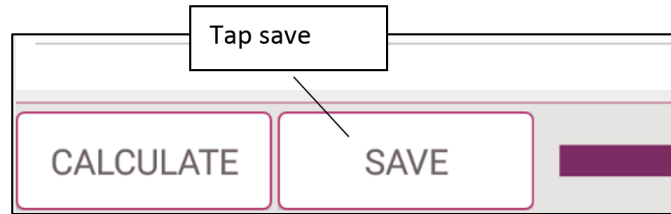


Figure 105: save the assessment

16. If you have failed to answer all the questions you will get the error below. Each unanswered question will be highlighted in red. Click OK to dismiss the pop up. Ensure all questions are answered before repeating step 15.

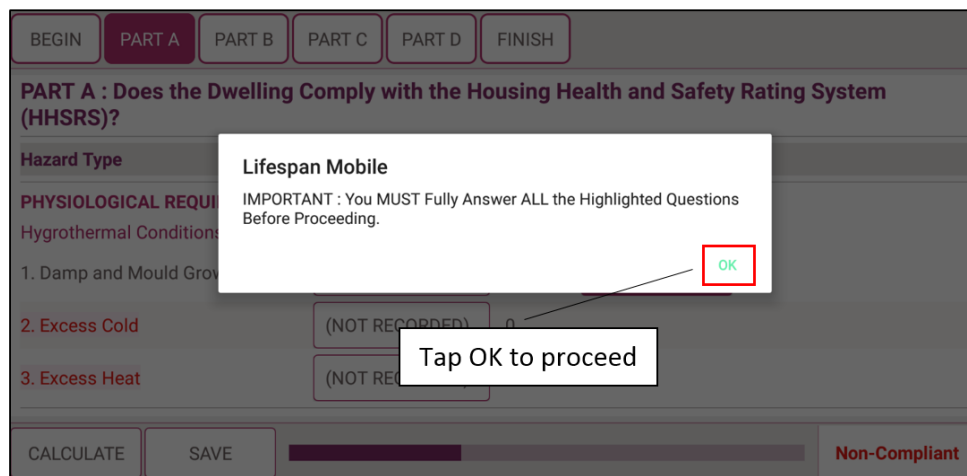


Figure 106: complete all questions before saving

7. WHQS Assessment

Lifespan Mobile contains a WHQS module to allow you to quickly collect WHQS data.

7.1 Access

1. To enter WHQS assessments, highlight a property and tap WHQS.

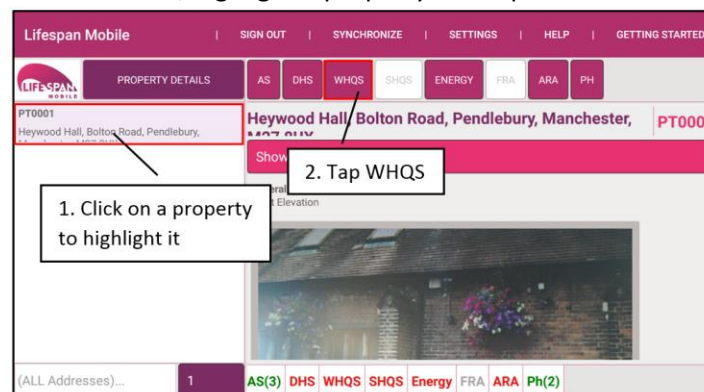


Figure 107: WHQS

7.2 Layout

The layout of the default WHQS screen is shown below;

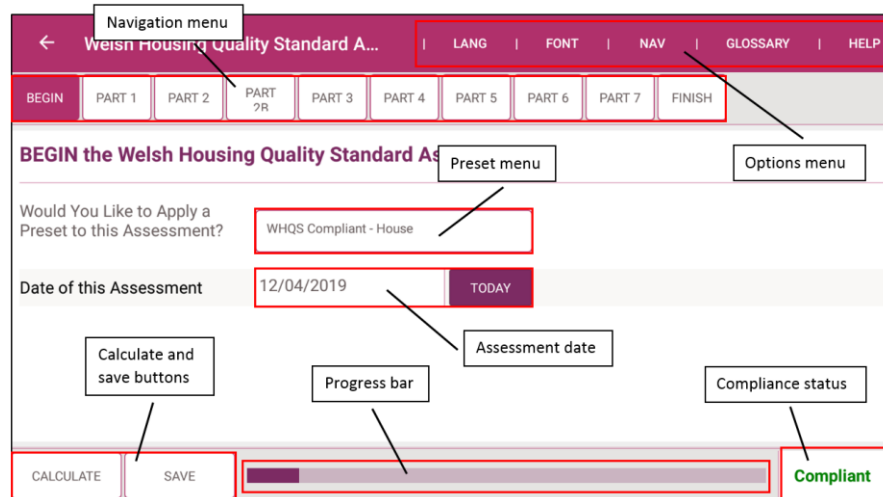


Figure 108: WHQS screen layout

7.2.1 Options menu

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

LANG

This button toggles between English and Welsh language. Tap IAITH to return to English.

FONT

This button decreases the font size. Tap the button again to return to the default font size.

NAV

This button changes the navigation bar to a "Previous / Next" toolbar. Tap the button again to return to the default navigation bar.

GLOSSARY

This button provides glossary information down the right side of the screen. Selecting the button again hides the glossary from view.

7.2.2 Other options

WHQS Presets

You can save time by selecting one of two WHQS compliant preset templates, House or Flat. Selecting either of these options will set all applicable components to “Pass”.

1. On the ‘Begin’ tab, tap the field to the side of the question “Would you like to apply a preset to this assessment?” (by default, this will show as ‘no preset applied’).
2. Select the preset from the list to apply it.

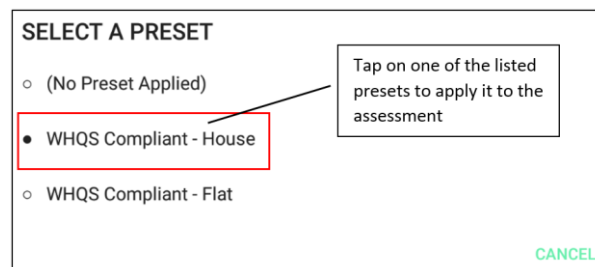


Figure 109: select a preset

Assessment Date

Set the date of the assessment.

1. Tap the date to choose a specific date or tap today to insert today's date.

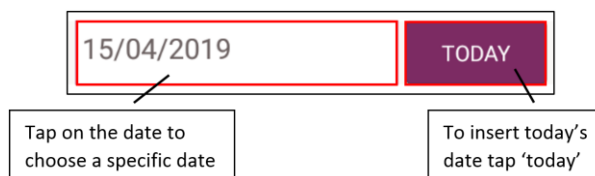


Figure 110: assessment date

2. Select the date using the calendar tool then tap ok.

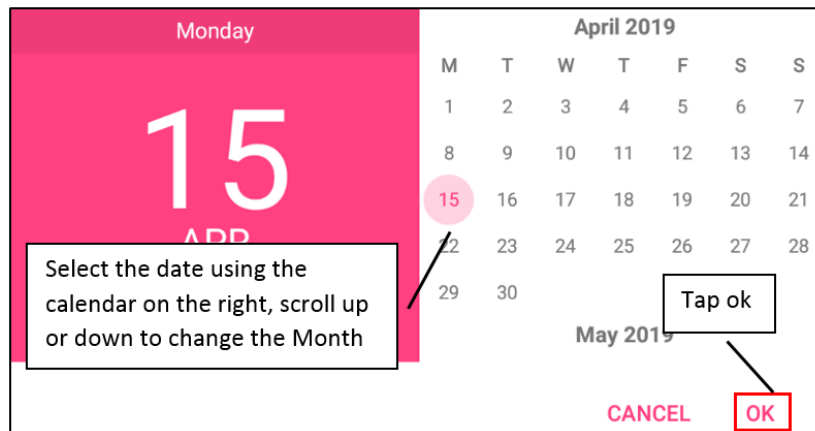


Figure 111: select a date

Calculate and Save

Once you have gone through each of the tabs to complete the assessment, tap the calculate button to calculate the WHQS compliance for the property.

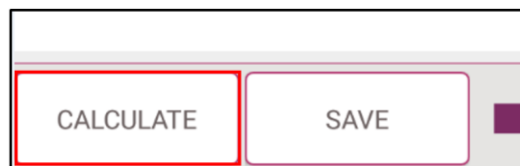


Figure 112: calculate assessment

Once the assessment has been calculated the prompt below will appear. Click OK to proceed.

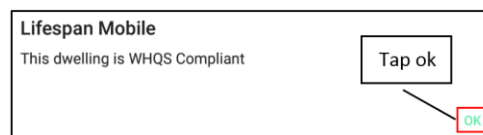


Figure 113: calculated assessment

Tap the Save button to save the assessment. You will be returned to the main screen. See [Figure 107](#).



Figure 114: save assessment

Progress bar and compliance status

The progress bar indicates the progression of the assessment and compliance status indicates if the property is compliant or non-compliant plus the cost to make the property compliant. See figure 29.

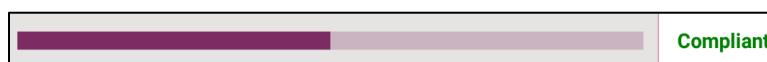


Figure 115: progress bar

7.3 Adding and editing assessments.

1. Select the property you wish to add a new or edit the existing assessment to then select “WHQS”.

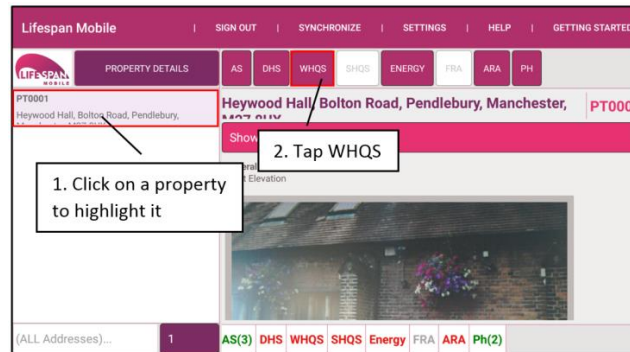


Figure 116: adding or editing an assessment

2. Select a WHQS preset and tap today or enter the date of the assessment. This sets each WHQS question to “Pass”.

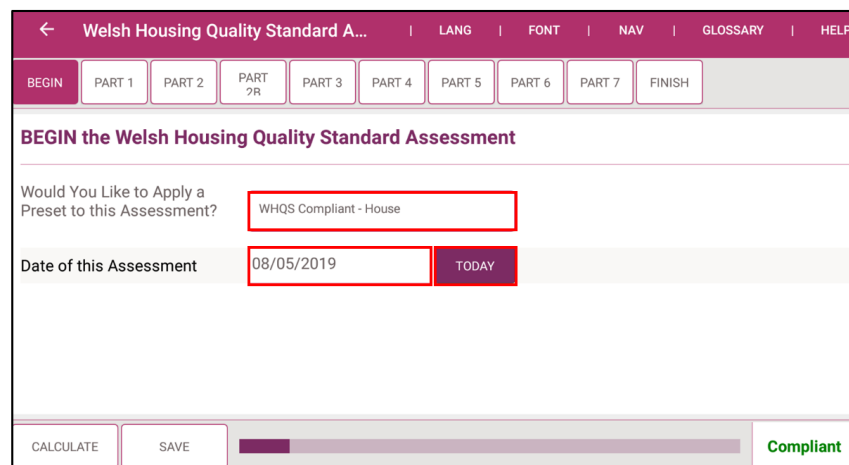


Figure 117: begin the assessment

3. Work through each tab and make any required changes by tapping on the appropriate button. Please note that on some questions the acceptable fail options are greyed out and cannot be selected.

In the example below the answer has been changed to fail.

PART 4 : Does the Dwelling Contain up-to-date Kitchens and Bathrooms?

WHQS Answers	Works	Cost
1. Is the Kitchen 15 Years Old or Less? <input type="button" value="PASS"/> <input type="button" value="NA"/> <input type="button" value="NI"/> <input type="button" value="AF-C"/> <input type="button" value="AF-T"/> <input type="button" value="AF-R"/> <input type="button" value="AF-P"/> <input type="button" value="FAIL"/> (none)		£0
2. Is the Kitchen in Good Condition? <input type="button" value="PASS"/> <input type="button" value="NA"/> <input type="button" value="NI"/> <input type="button" value="AF-C"/> <input type="button" value="AF-T"/> <input type="button" value="AF-R"/> <input type="button" value="AF-P"/> <input type="button" value="FAIL"/> Complete Kitchen=2 Bed Kitchen		£4,670
4. Are there Adequate Facilities for Washing, Drying and Airing Clothes? <input type="button" value="PASS"/> <input type="button" value="NA"/> <input type="button" value="NI"/> <input type="button" value="AF-C"/> <input type="button" value="AF-T"/> <input type="button" value="AF-R"/> <input type="button" value="AF-P"/> <input type="button" value="FAIL"/> (none)		£0

Figure 118: setting a question as a fail

- When changing a question to fail you will notice that works and costs are displayed to make the question compliant. Tap on the works field and select the required work from the list. Tap OK.

Works

(none) Select a work item from the list

Complete Kitchen=1 Bed Kitchen

Complete Kitchen=2 Bed Kitchen Tap ok

Figure 119: selecting works

WHQS works are linked to the Schedule of rates in Lifespan Housing. Speak to the Lifespan team for further information regarding this.

- When selecting any Acceptable fails you are required to enter a comment in the comments text box.

2. Is the Kitchen in Good Condition?

Complete Kitchen=2 Bed Kitchen £4,670

4. Are there Adequate Facilities for Washing, Drying and Airing Clothes?

(none) £0

(IMPORTANT: Acceptable Fail Comments are Required) Enter comments here

Figure 120: acceptable fail comments

- Enter your comments and minimize the keyboard.

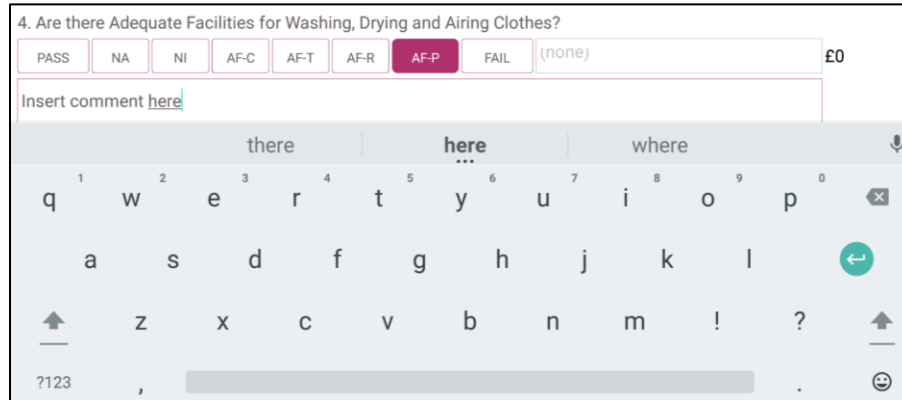


Figure 121: acceptable fail comments

7. Proceed through all 7 parts of the assessment, making changes where applicable.
8. At the end of the assessment tap on the Finish button. Here you have the option to make the dwelling compliant, however if you choose to do this you are required to enter comments in the box below.

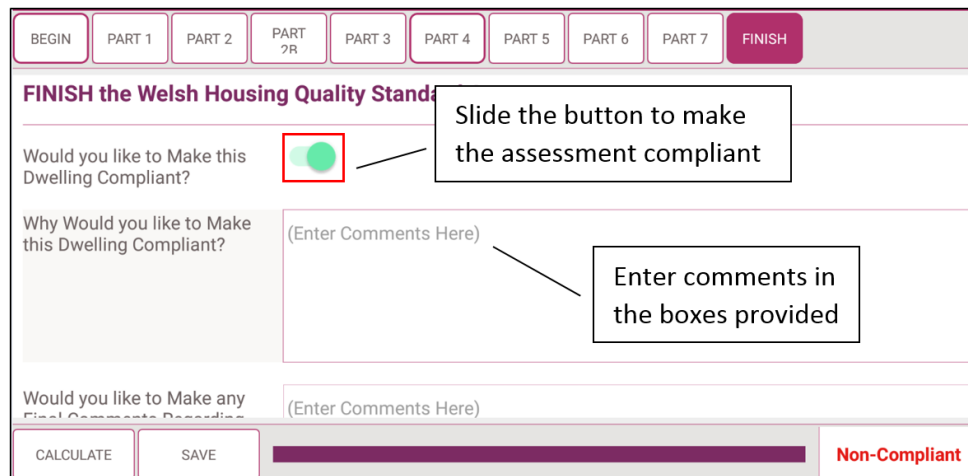


Figure 122: finish the assessment

9. Tap on calculate and then save the assessment.

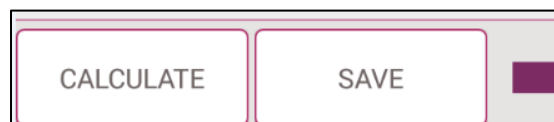


Figure 123: calculate and save the assessment

10. If you chose not to enter a preset in step 2 then you must answer each question in the assessment by tapping on the appropriate answer. Failure to do so will result in the following error when you tap save. Tap OK then answer all highlighted questions before tapping save again.

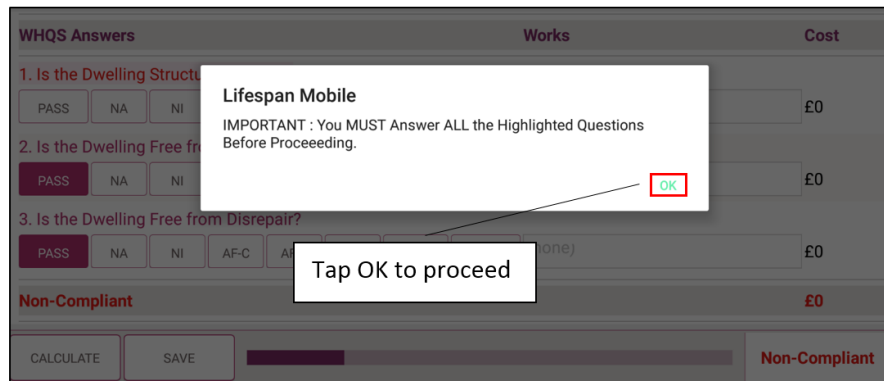


Figure 124: complete all questions before saving

11. After the assessment has been calculated the dwellings compliance will be displayed on Screen. Tap OK to proceed.

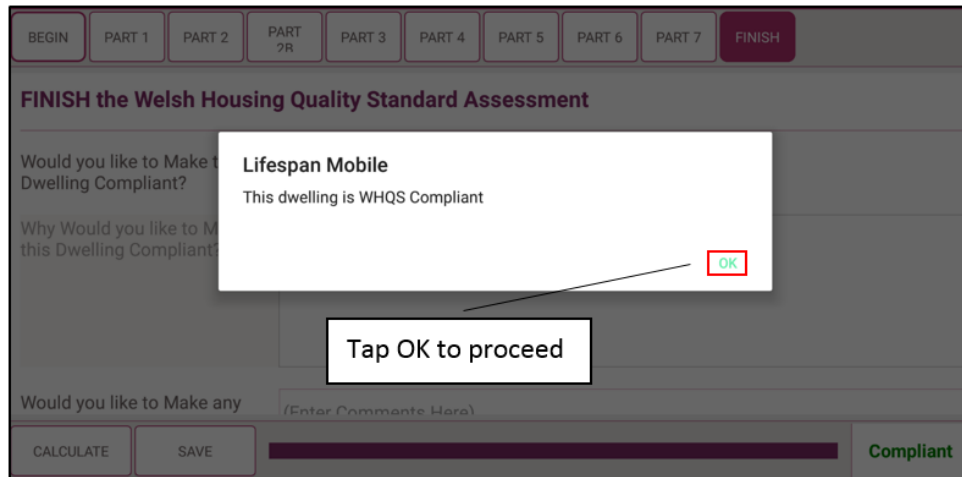


Figure 125: calculated assessment

12. Tap Save to save the assessment and return to the main menu.

8 Fire Risk Assessment

8.1 Access

1. Select the property you wish to add a fire risk assessment to and click FRA (Fire Risk Assessment).



Figure 126: fire risk assessment button

8.2 Layout

The layout of the fire module is shown below.

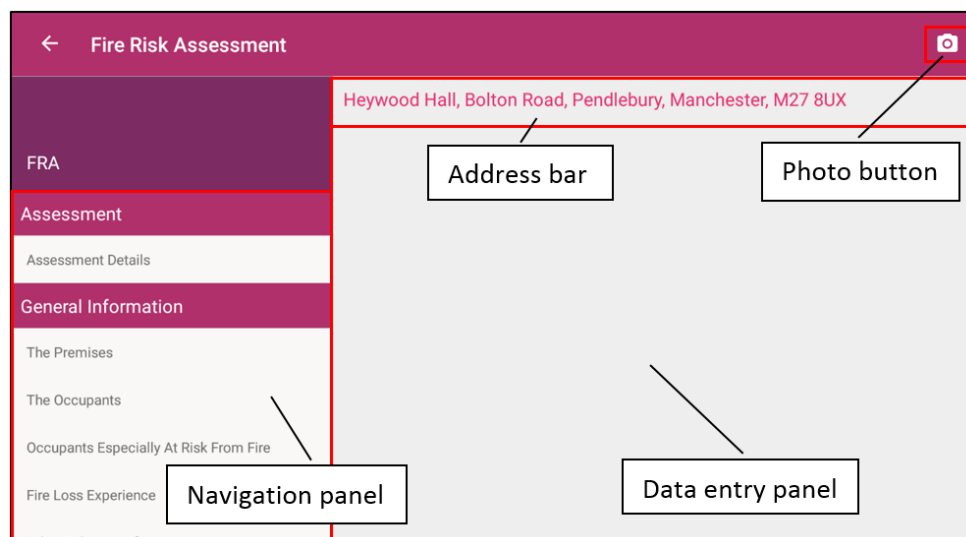


Figure 127: module layout

The navigation panel consists of headings and sub-headings, within which all the questions for the assessment are stored. The main sections being;

- Assessment
- General Information
- Fire Hazards
- Fire Protection Measures

Clicking into any of the sub-headings will bring up the associated questions on the data entry panel.

8.3 Adding a new assessment

1. To begin the assessment, tap on the first sub-heading 'Assessment Details'. The list of questions will appear in the data entry panel.
2. Questions 1-3 are free text, click on each to complete them.

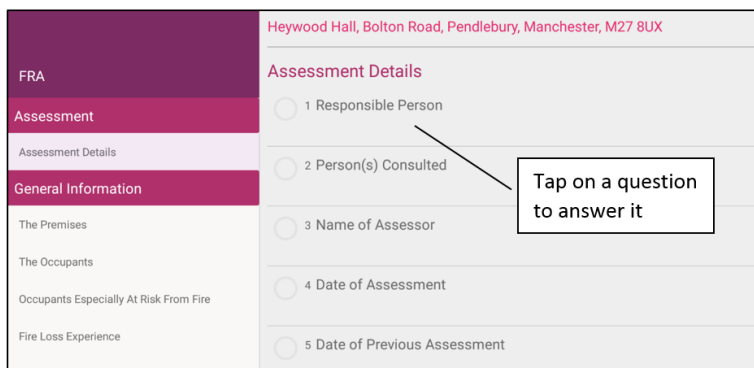


Figure 128: assessment details

3. Tapping on the question will bring it up on the full screen, enabling you to enter the details. Click in the box and use the keyboard to type in your answer, then tap the back button to return to the previous screen.

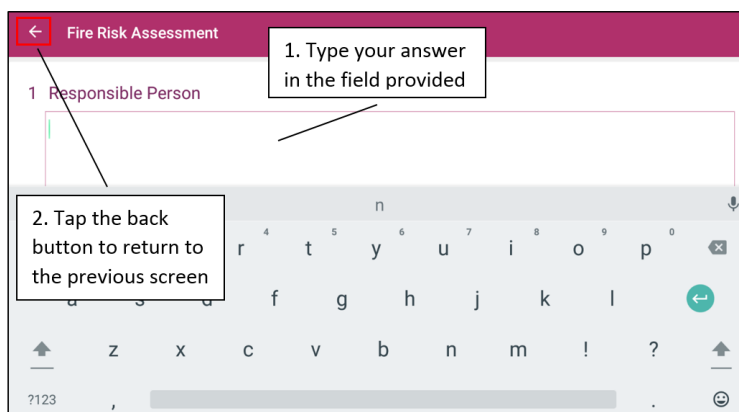


Figure 129: responsible person

The circle next to each question will be ticked and show in green once completed.

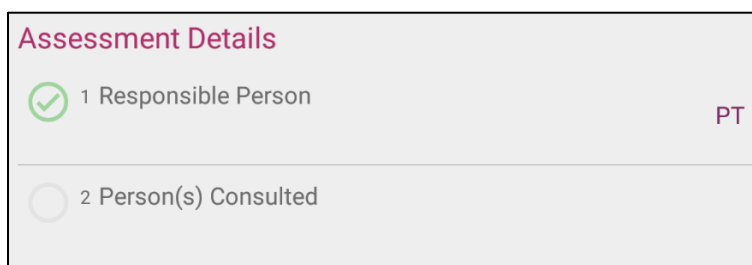


Figure 130: ticked completed question

4. Questions 4-6 are relating to dates. Click onto the question and tap on the date to bring up the calendar or tap 'today' to insert today's date.

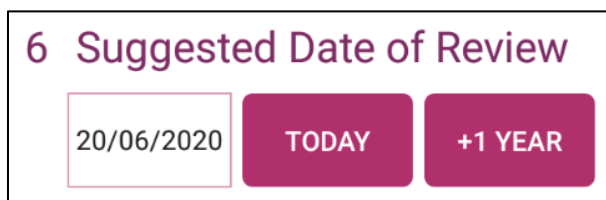


Figure 131: suggested date of review

Tapping '+1 Year' will add another year onto the date selected – this is useful for suggesting a new review date where the properties are on 1- or 5-year review cycles.

5. Go to the navigation panel and select the next sub-heading to bring up another set of questions, working through each screen until everything has been completed.

There are many instances within the assessment where you are provided with a multiple-choice answer. In these instances, when you tap on the question, a 'select option' box will be at the top of the screen.

6. Tap 'Select option' to display the choices. Scroll through the answers until the correct one is highlighted, then tap ok.

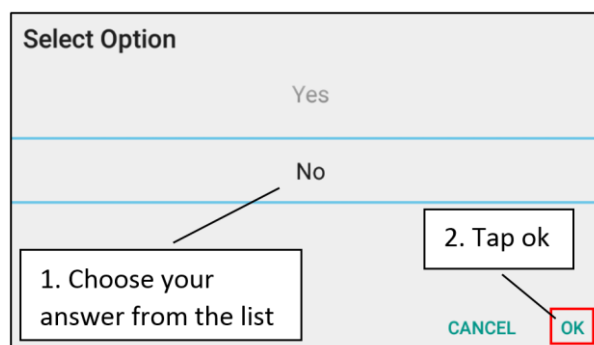


Figure 132: select option

8.4 Comments and Action Plan

Throughout the assessment, you will see a 'Comments & Actions' section underneath the answer field. The comments are recorded with the answer and if the 'Action Required?' button is pressed, the comment will also become part of the action plan in the final report.

1. Tap in the comments box and use the keyboard provided to enter any comments relating to the question.
2. To include the comment as part of the action plan, tap the 'Action Required?' button. It will show in green when this option is selected.
3. To include a further comment, tap 'Add Comment' and enter the details in the additional box provided. Once finished, press the back button to return to the main screen.

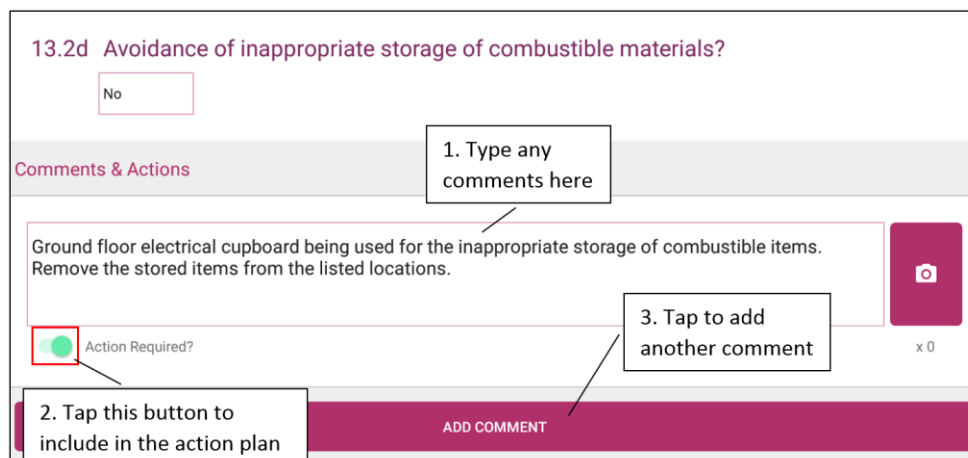


Figure 133: comments

You can have multiple comments per question and one or all of these can make up part of the action plan, just tap the button below those you want to include.

On returning to the main screen, you will now see that the question has been answered and has one comment attached, demonstrated by the icon underneath the question.

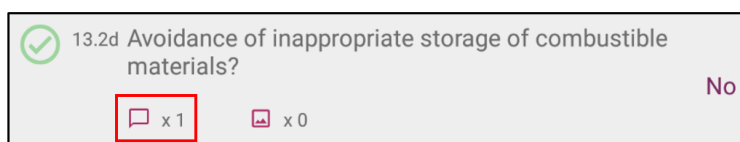


Figure 134: comment icon

NOTE: Comments should be entered for every applicable question and must be a minimum of 5 characters in length.

If the software is expecting a comment to a question that has been answered without one, a warning symbol will appear next to the question on the main screen as shown below. Go back in to the question to complete the missing details.

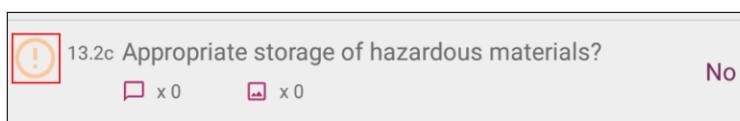


Figure 135: warning icon

8.5 Photographs

Along with being able to add comments to each question, one or multiple photographs can also be included.

1. Tap on the camera icon to the right of the comments box to bring up the options box.

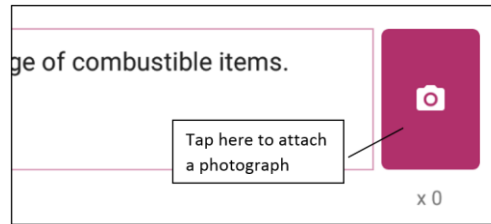


Figure 136: photo button

2. You now have the option to either take a new photograph using the camera on your device or use an existing image from the gallery.

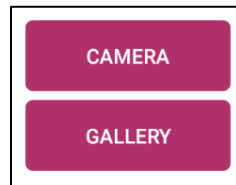


Figure 137: photograph options

- CAMERA - Use the camera to take a new photograph, then tap the tick to save the image or the back button to retake the image.

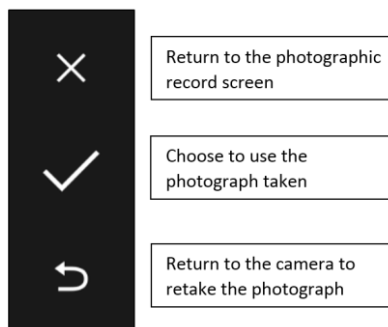


Figure 138: camera options

- GALLERY - Choose an existing image from your gallery, this will be saved automatically when selected.

Once taken or selected, your photograph will be displayed under the comments box.

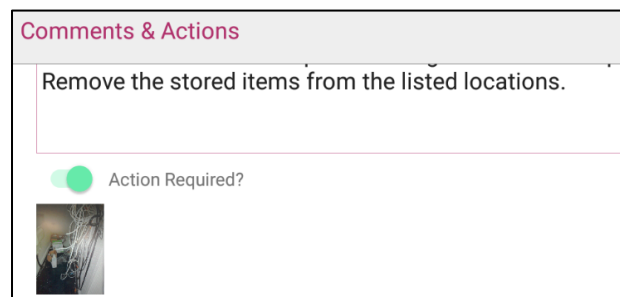


Figure 139: attached photograph

3. Repeat steps 1 and 2 for any additional images required.

- To delete a photograph, tap on it to bring up the options and tap 'delete photo'.

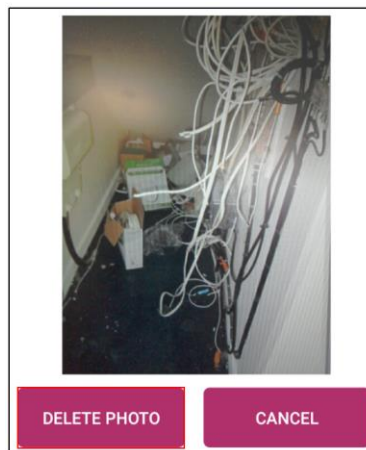


Figure 140: delete photo

9 Asbestos Risk Assessment

9.1 Access

- Select the property you wish to add an asbestos assessment to and tap ARA (Asbestos Risk Assessment).



Figure 141: asbestos risk assessment

9.2 Adding a new assessment

- Tap on New next to Sample ID. The software will now create a Sample ID based on the building UPRN.

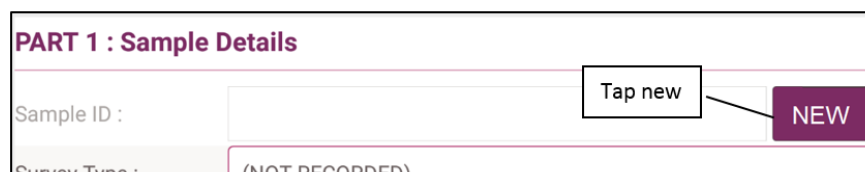


Figure 142: new sample

- Tap on the field next to 'Survey Type' to choose from the drop-down list.

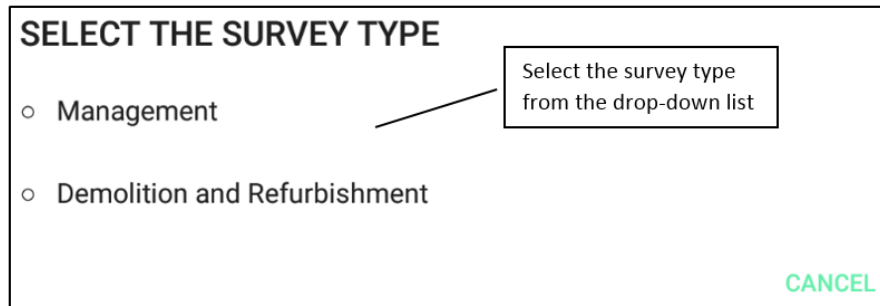


Figure 143: survey type

3. Select the 'Sample Type' and 'Sample Results' from the drop-downs lists that appear when you click on these fields.
4. 'Location (1)', 'Location (2)', 'Element Type' and 'Action Required' are free text fields, however there is also a preset option available. Tap inside the box to bring up the keyboard and enter values for these fields or tap on preset to select an option from the list.

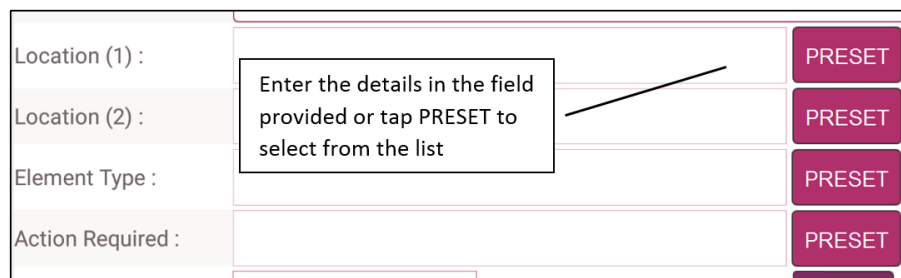


Figure 144: free text or preset fields

5. Use the calendar tool to set the assessment date. Tapping the Today button will set the assessment date to the current date.
6. Use the keyboard to type in the Consultant and Surveyor Names.
7. Type in the required Action Taken or tap the preset button to select from the list.
8. Use the calendar tool to set the last and next review dates.



Figure 145: selecting review dates

9. Tap on Part 2.



Figure 146: part 2

10. Tap on the fields under 'Assessment Factor' for Product Type, Condition, Surface Treatment and Asbestos type and select an answer from the drop-down lists.

PART 2 : Material Assessment	
Name	Assessment Factor
Product Type :	Asbestos cement
Condition :	Good condition
Surface Treatment :	Asbestos cement she
Asbestos Type :	Chrysotile (White)

Select values from the drop-down lists

Figure 147: part 2: material assessment

11. Tap on Part 3.
12. Tap on the fields under 'Assessment Factor' for each of the questions and select an answer from the drop-down lists.
13. Tap on part 4.
14. Tap the button if the works are licensed works.

PART 4 : Other Details	
Licensed Work :	<input checked="" type="checkbox"/>
UOM :	M2
Quantity :	5

Tap the button if licensed work

Figure 148: part 4: other details

15. Select the UOM from the drop-down list.

16. Use the keyboard to enter the quantity.
17. Enter any additional comments if required.



Figure 149: comments

18. Tap on Save.



Figure 150: save

9.3 Editing an assessment

1. Select the assessment you wish to edit.

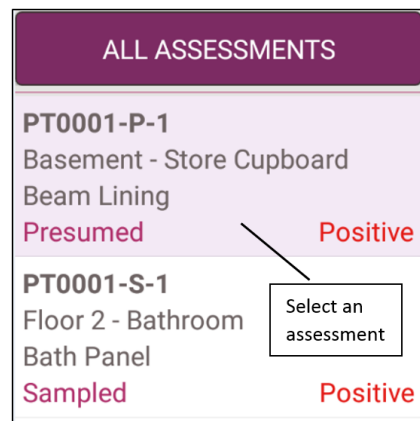


Figure 151: select an assessment

2. Make the required changes and tap Save.

9.4 Adding a photograph to an assessment

1. Select the assessment you wish to add a photograph to.
2. Tap on Photo.

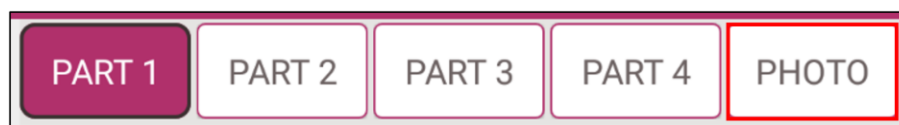


Figure 152: photo

3. You can select an existing photograph from the gallery.
 - a. Tap on the Gallery button.
 - b. Select the photograph you wish to use.
 - c. Tap on Save.

4. You can use the device camera to take a photograph.
 - a. Tap on the Camera button.
 - b. Take the photograph & tap the tick on your tablet screen to save the photograph.
 - c. Tap on Save.

9.5 Deleting an assessment

1. Select the assessment you wish to delete.
2. Tap Delete.

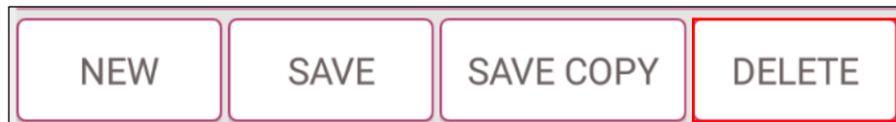


Figure 153: delete assessment

3. Tap Yes.

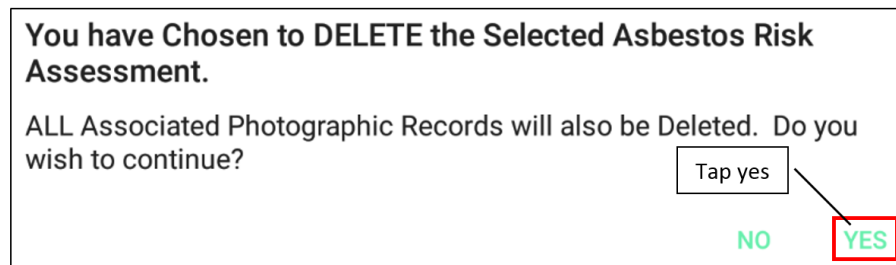


Figure 154: confirm to delete

9.6 Copying an assessment

1. Select the assessment you wish to copy.
2. Tap Save Copy.

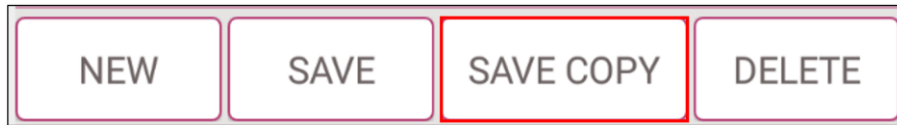


Figure 155: save copy

3. Tap yes to confirm.

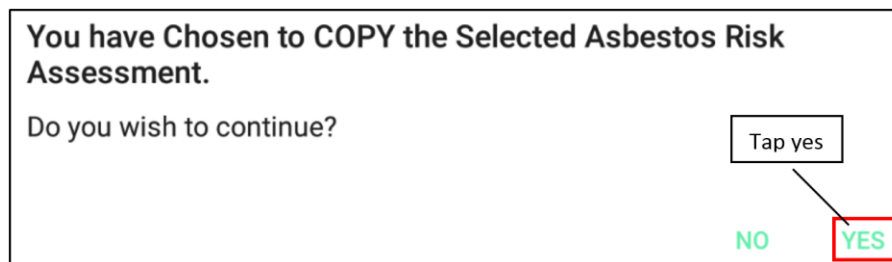


Figure 156: confirm to copy assessment

4. Make any required changes to the copied assessment & Click Save.

10. Photographs

10.1 Taking a new photograph

1. To take a new photograph and add it to a property, highlight the property and tap on PH (Photos).

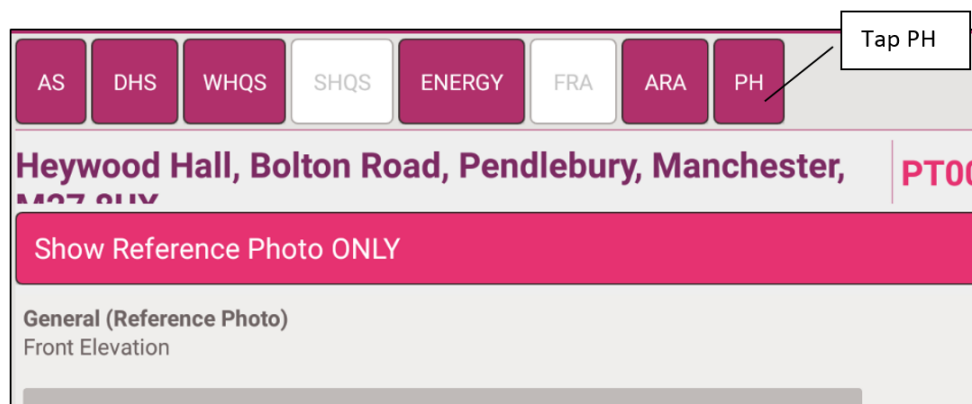


Figure 157: photo button

2. Tap the camera button to open the camera.

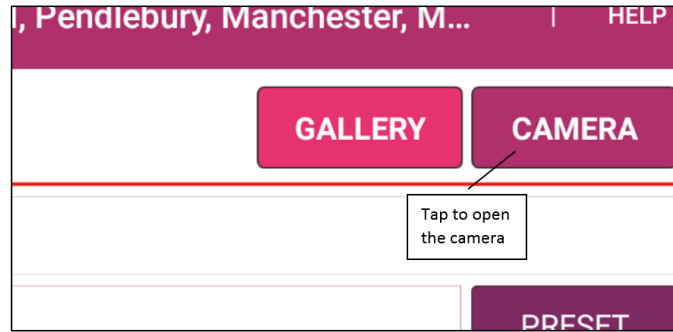


Figure 158: open the camera

- Once you have taken the photograph, tap on the relevant icon to either to use the image taken, retake the photograph or return to the photographic record screen.

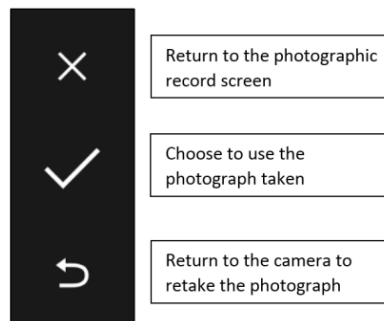


Figure 159: photograph options

- Back on the photographic record screen, type in the photograph description or tap 'preset' to select a description from the list. You can also set the photograph to be the main photograph associated with the property in Lifespan Housing. Tap save to continue.

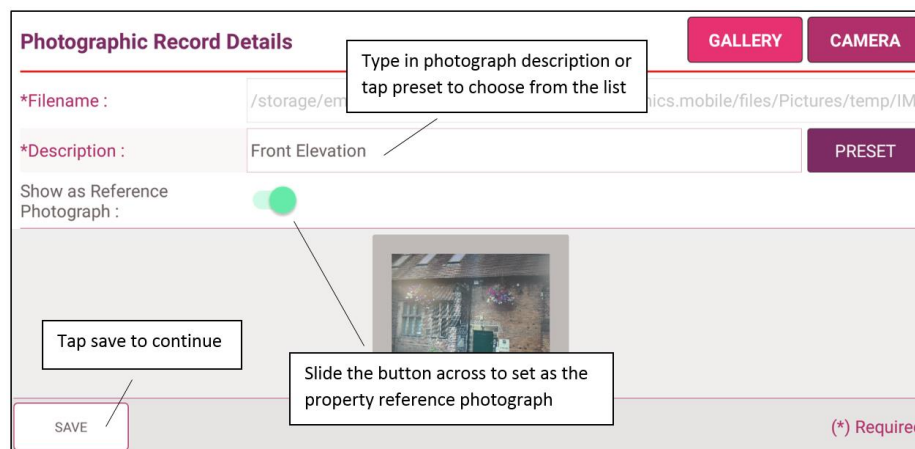


Figure 160: photograph description

10.2 Adding a photograph from the gallery

1. To take a new photograph and add it to a property, highlight the property and tap on PH (Photos). See [Figure 157](#): photo button
2. Tap the gallery button to open the gallery.

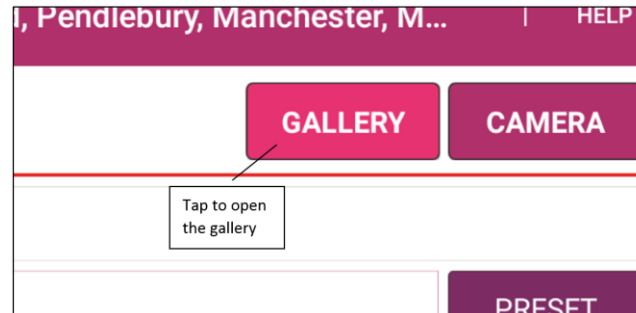


Figure 161: open the gallery

3. Select the required photograph from the gallery.
4. Repeat step 8.1.4 above.

10.3 Editing a photograph

1. From the property details screen, select the photograph you wish to edit and tap on PH. The photo you are editing will have a pink border around it.

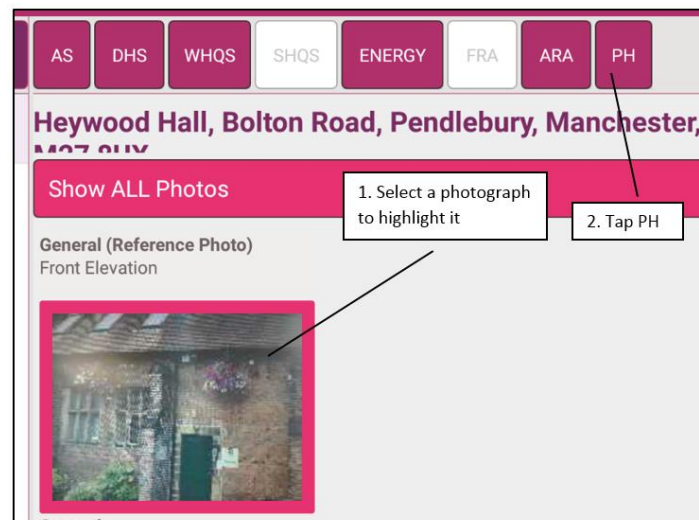


Figure 162: select a photo

2. Tap Edit the selected photographic record.



Figure 163: edit the selected photographic record

3. Make any required changes and tap Save.

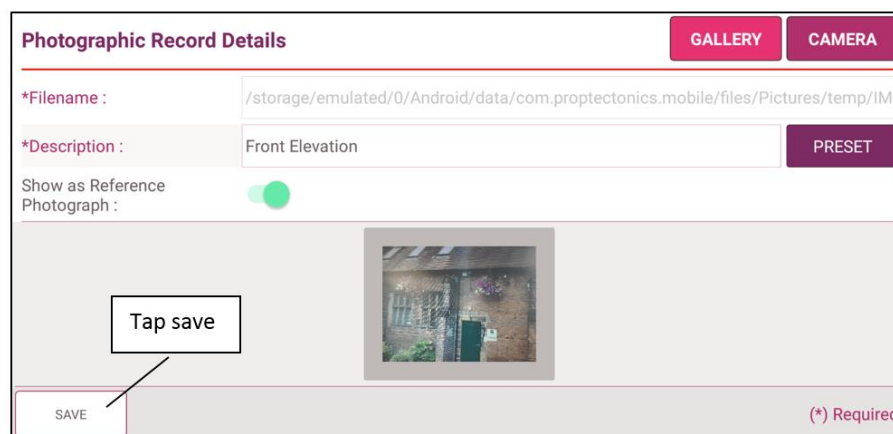


Figure 164: save your changes

10.4 Deleting a photograph

1. Select the photograph you wish to delete and tap on Photos. See Figure 162.
2. Tap Delete the selected photographic record.

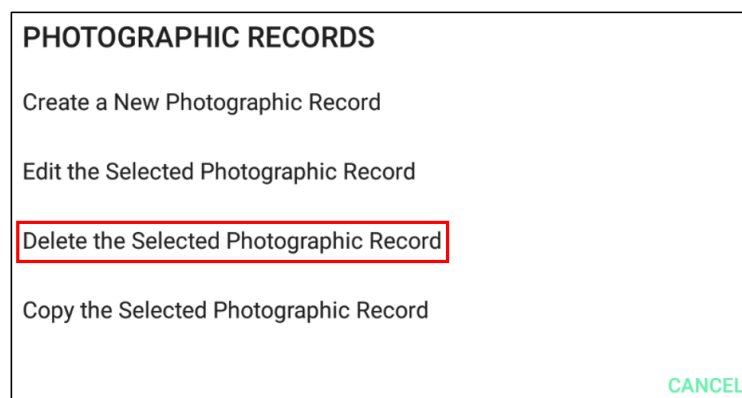


Figure 165: delete the selected photographic record

3. Tap Yes to continue.

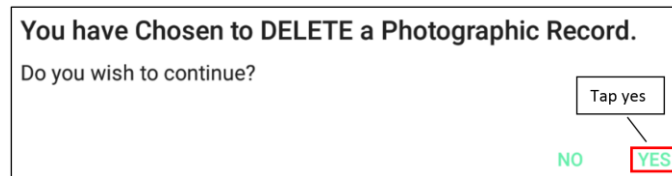


Figure 166: confirm to delete

NOTE This will delete the property from the address list on your device, it will not impact on any data within Lifespan Housing.

10.5 Copying a photograph

1. Select the photograph you wish to delete and tap on Photos. See [Figure 162](#).
2. Tap Copy the selected photographic record.

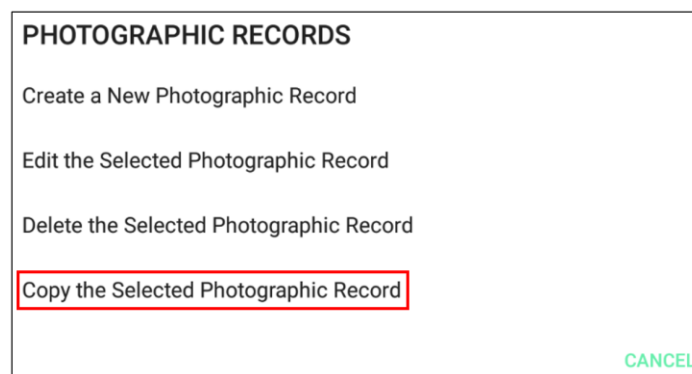


Figure 167: copy the selected photographic record

Details of the property and selected photograph being copied appear on the left of the screen and on the right, you can choose which properties to copy the picture over to. All downloaded properties from the device will appear on the list and you have the option to copy the image to one or more of these at once.

- For the addresses you want the photograph copied over to, tap the button next to them so it turns green. Press the button next to 'Select All' to copy to all properties. Tap Save.

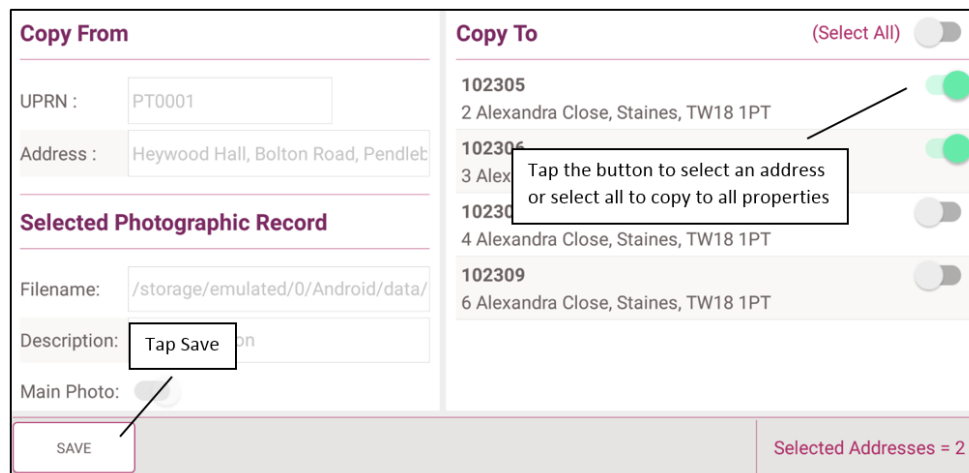


Figure 168: select addresses to copy over photograph

- Tap Yes to continue.

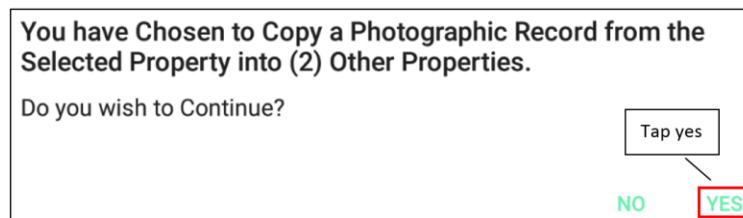


Figure 169: confirm to copy

10.6 Adding a photograph to building components

Lifespan mobile allows you to link a photograph to a building component.

- Within the attribute survey select the building component you wish to add a photograph to.
- Tap on P1 and take a photograph as per [section 9.1](#).

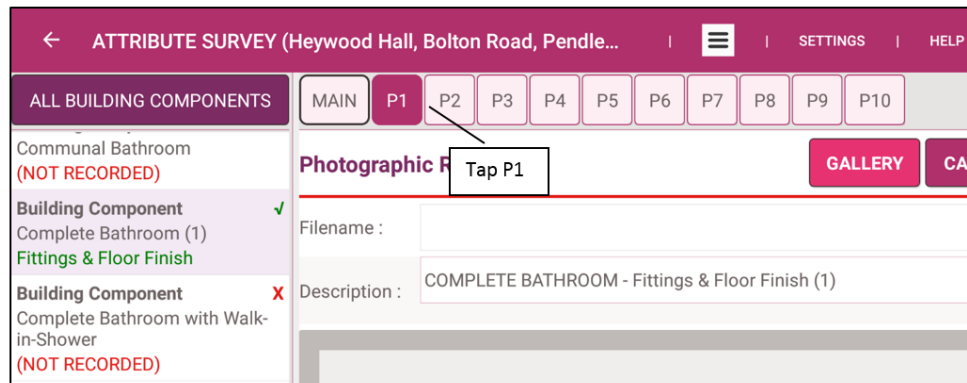


Figure 170: adding a component photograph

3. Repeat the process for as many photographs are needed, using tabs P1-P10.
4. Click Save.