



# PPT User Manual

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Version 4.0

## Contents

1. Introduction .....	3
2. Logging In .....	3
3. Opening Property Performance Tool .....	3
4. Navigation .....	4
4.1 Menu Bar .....	4
4.2 Address List .....	5
4.3 Details Pane .....	8
5. Settings .....	9
5.1 Questions .....	9
5.2 Question Templates .....	12
5.3 Property Classification .....	14
5.4 A.L.R Import/Export .....	16
6. Property Detail .....	18
7. Property Analysis .....	19
8. Option Analysis .....	25
9. Social Value .....	27
10. Multi-Property .....	31
11. Portfolio .....	36
12. Dashboard and Reporting .....	38
Appendix One: Change Log .....	43

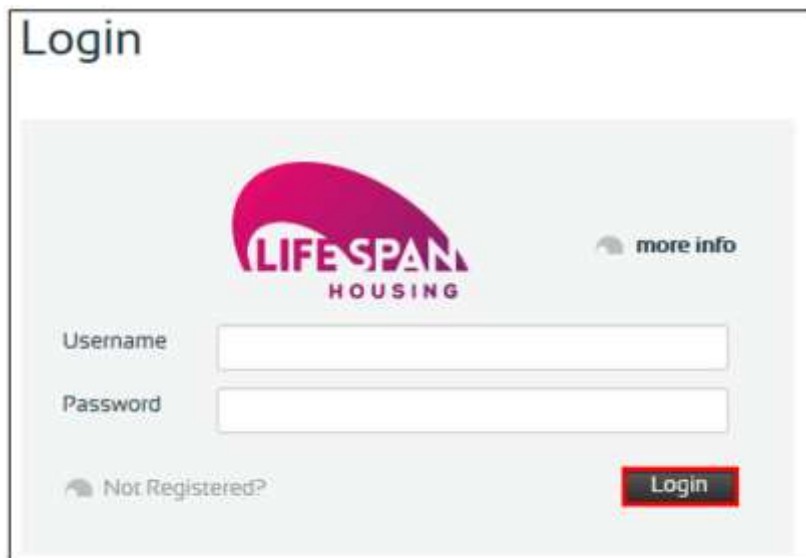
## 1. Introduction

Lifespan's Property Performance Tool (PPT) provides Lifespan Housing users with the ability to evaluate the performance of their housing stock.

The tool gives financial analysis across the entire stock and scenarios can be modelled and saved to provide meaningful analysis and smart reporting.

## 2. Logging In

1. Open your web browser and navigate to Lifespan Housing Web:  
[www.pt-lifespan.com/LifespanWeb](http://www.pt-lifespan.com/LifespanWeb)
2. Enter your username and password and click 'Login'.



The screenshot shows a web page titled "Login". At the top center is the Lifespan Housing logo, which consists of a stylized pink and white wave above the text "LIFESPAN HOUSING". To the right of the logo is a link labeled "more info" with a small icon. Below the logo are two input fields: "Username" and "Password". At the bottom left, there is a link labeled "Not Registered?" with a small icon. At the bottom right, there is a red button labeled "Login".

Figure 1: logging in

## 3. Opening Property Performance Tool

1. Once you have successfully logged into the software, go the bottom right of the summary screen to the Lifespan Links section. Click on the link 'Lifespan Property Performance Tool'.

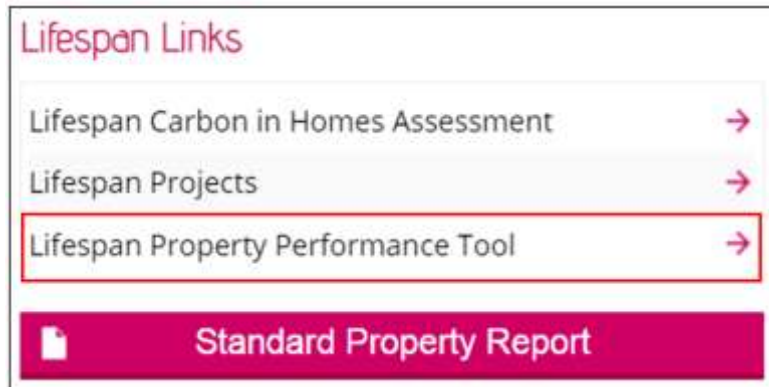


Figure 2: link to property performance tool

#### 4. Navigation

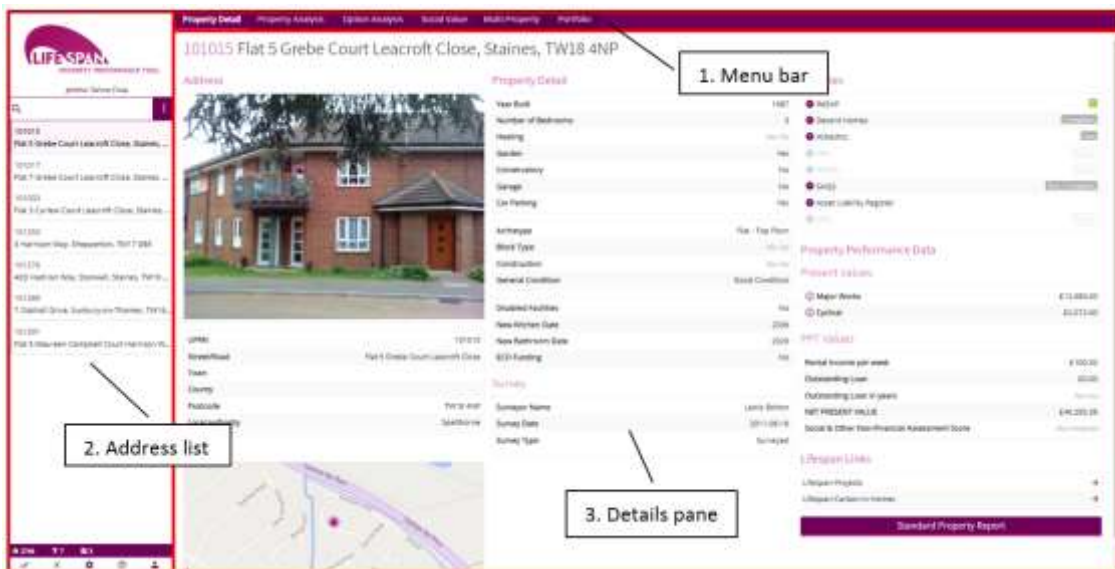


Figure 3: property performance tool

##### 4.1 Menu Bar

Along the top of the screen you will find the menu bar, this lists six headings which hold further information for the address(es) selected.



Figure 4: menu bar

- Property Detail – gives you an overview of the property including address, property details, module information and performance data.
- Property Analysis – gives you a breakdown of the finances for the specific property selected.
- Option Analysis – gives you a breakdown of the option and financial details for the specific property selected.
- Social Value – gives you an overview of the social standing of the selected property in the area located.
- Multi-Property – gives you a financial detail and analysis for the multiple properties selected.
- Portfolio – gives you an overview for the entire housing stock and provides you with a 30-year forecasting analysis.

## 4.2 Address List

All the addresses in the project will be in the list on the left of the screen. As with other Lifespan software, there is the option to filter down to the properties required.

1. To filter to a specific property using the address or UPRN, type the details into the search bar at the top and the property will appear in the list below.

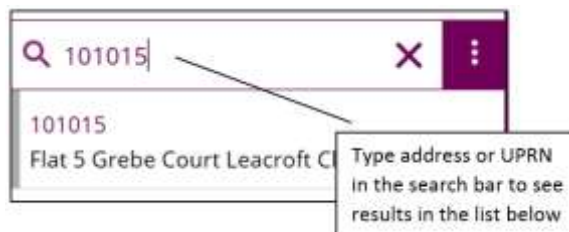


Figure 5: address search bar

2. For a broader search, click on the three dots to the right of the address bar for more options.

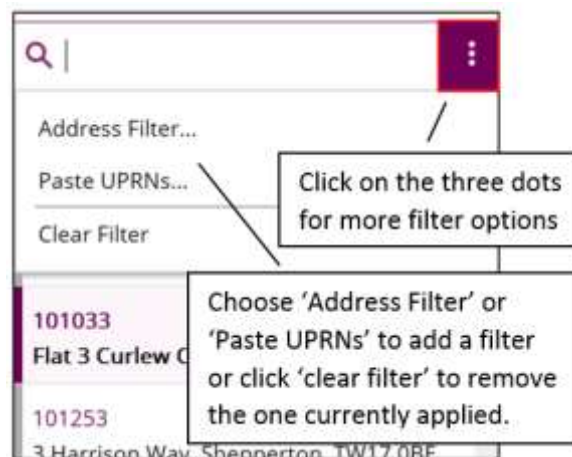
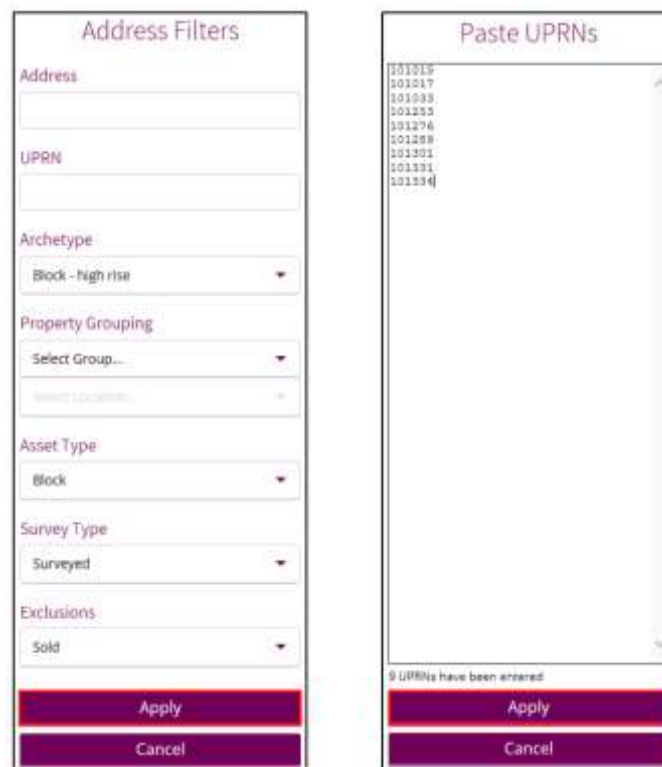


Figure 6: search bar filters

- Address Filters – this option allows you to narrow down your search by selecting attributes, so a selection of properties with common features can be chosen.
- Paste UPRNs – here you can filter to specific properties by entering in their unique reference number.

Once you have entered in the details, click ‘Apply’ and the list will now show properties from the filters used.



*Figure 7: address and UPRN filters*

3. To view some basic property information for any address in your filter, just hover over it in the address list and a panel will pop up to the right. This will display an image of the front elevation, UPRN, full address, local authority, archetype and net present value of the property selected. You can do this from any tab as the address list stays on the left of each screen.

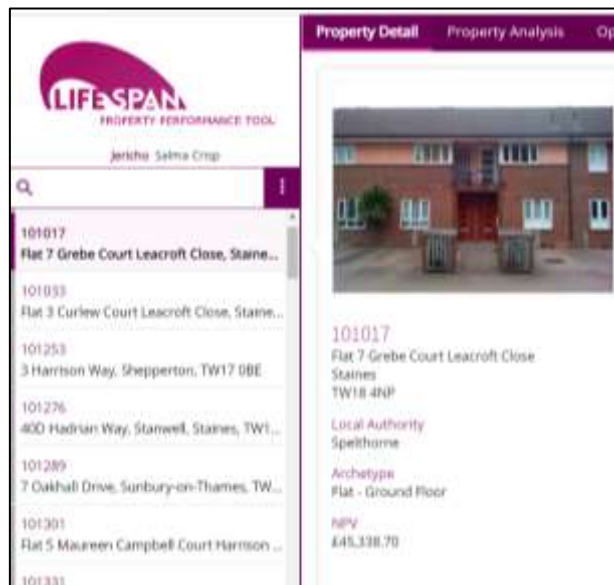


Figure 8: basic property details

Underneath the address list is an information panel providing details on the current property list, this shows you the total number of properties in the housing stock, number of properties within the current filter and the number of selected properties;

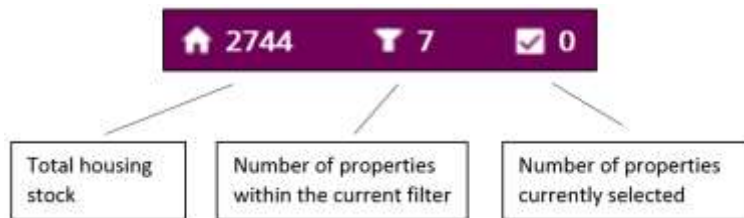


Figure 9: information panel

4. To the bottom left of the screen you will see the bar below. This includes further features to;
- Select all properties
  - De-select all properties
  - Enter the settings window
  - Raise a support ticket
  - Log out of the software

Click on any of these to utilise the function.

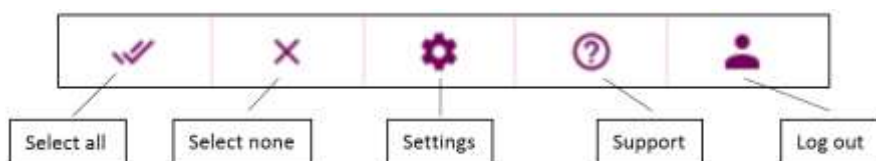


Figure 10: function bar

### 4.3 Details Pane

The details pane displays all information held under each of the headings at the top of the page in the menu bar. Click on the heading to see all relevant information for the selected property.

Each section has the same layout, so it is easy to navigate to, locate and amend the relevant information.

1. At the top of the details pane in each heading is a title bar which by default will show as today's date, followed by the heading name and property UPRN. This can be amended easily by first clearing the contents in the box and typing in a new description.



Figure 11: title bar

2. To the right of this you will find three buttons, click on the relevant one to;
  - Enter notes for analysis details
  - Save the updated data
  - Reset and restore original data

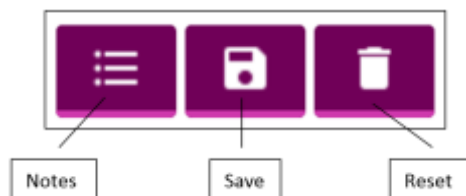


Figure 12: title bar buttons

3. After saving, if you exit the property and return to it at a later stage, the default values will show on screen. To retrieve saved data, go to the arrow to the right of the description and select the required file from the drop-down list. The saved data will now populate the fields below.



Figure 13: retrieving a saved file



## 5. Settings

This area currently enables you to access the import/export sheet to amend questions which appear within the 'Social Values' tab.


1. Go to the function bar under the address list on the left and click on the icon (  ) to open settings.



Figure 14: configuration settings

2. Under the social heading, click on 'Manage Questions'.

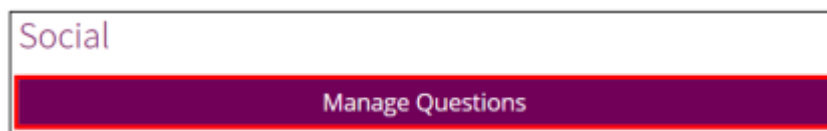


Figure 15: manage questions button

### 5.1 Questions

A new browser tab will open with the management screen. Clicking 'Questions' on the left will bring up three headings, click into any of these to see the relating questions on the right. Each of the headings relates to a section within the social values screen and the questions shown are the ones visible on that page, so any amendments made here will be mirrored within social values.

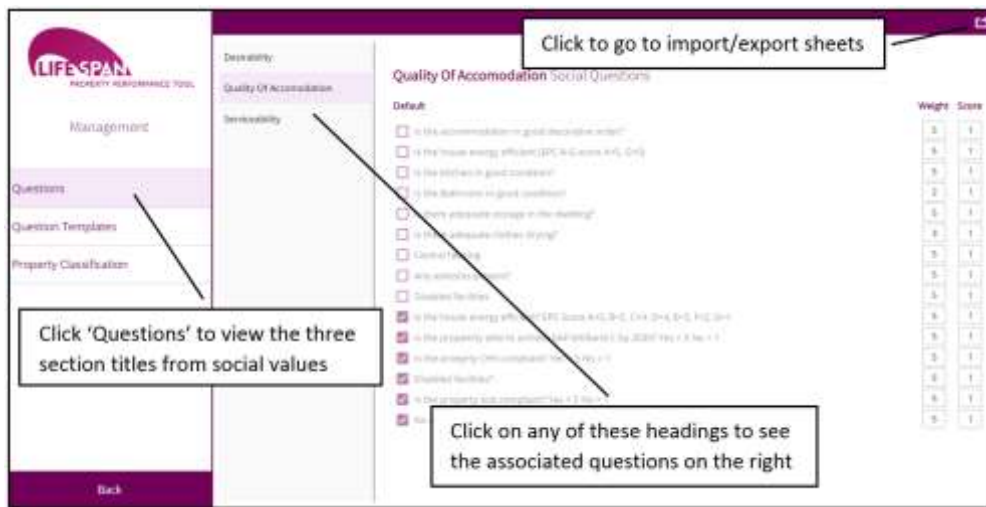


Figure 16: settings management screen


1. To edit or add a new question you will need to use the import/export sheets. Click on the icon () in the top right corner of the screen and press 'Export'.

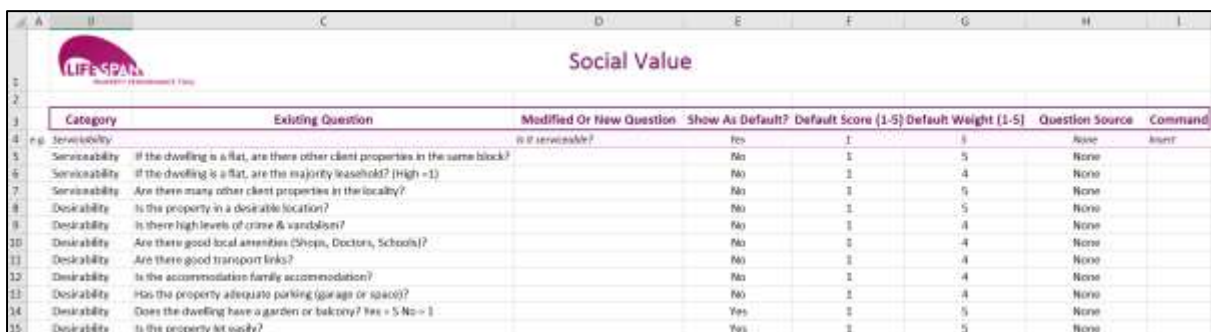


Figure 17: export function

An excel spreadsheet will automatically download which lists all the questions currently available on the system.

2. The spreadsheet is in the same format as in other Lifespan software where each row contains a new set of data, in this case a new question. There are 7 columns to complete as shown below;
  - Category – Decides which section of social values the question will come under, choose from either Serviceability, Desirability or Quality of Accommodation.
  - Existing Question – Lists all the questions currently available for use in the software.
  - Modified or New Question – Type in here the amended question for an existing row or enter a new question in a new row.

- Show as Default? – Choose either ‘Yes’ or ‘No’ as to whether or not to show the question as a default for all properties.
- Default Score – The score each question achieves before anything is updated within the software for individual properties. Choose a score between 1-5.
- Default Weight - The weight each question achieves before anything is updated within the software for individual properties. Choose a score between 1-5.
- Question Source – This controls where default answers will come from. The list of possible answers are shown in a separate worksheet within the exported spreadsheet;
  - None – The question has no default answer source so one will always be required to be provided in Social Scenarios and no default will be calculated.
  - Housing – Answers will come from Lifespan Housing (Social Values), if set.
  - RdSAP Bands – Use Latest RdSAP Band (A-G).
- Command – How the software interprets the data being input. Enter one of the following depending on your requirements;
  - Ignore – For any rows you don’t want to be affected.
  - Update – For any rows you have made changes to.
  - Insert – For any rows being added into the system.
  - Delete – For any rows you want to remove from the system.



Category	Existing Question	Modified Or New Question	Show As Default?	Default Score (1-5)	Default Weight (1-5)	Question Source	Command
Serviceability	If the dwelling is a flat, are there other client properties in the same block?	Is it serviceable?	Yes	1	5	None	Insert
Serviceability	If the dwelling is a flat, are the majority leaseholds? (High = 1)		No	1	5	None	
Serviceability	Are there many other client properties in the locality?		No	1	4	None	
Serviceability	Are there many other client properties in the locality?		No	1	5	None	
Desirability	Is the property in a desirable location?		No	1	5	None	
Desirability	Is there high levels of crime & vandalism?		No	1	4	None	
Desirability	Are there good local amenities (Shops, Doctors, Schools)?		No	1	4	None	
Desirability	Are there good transport links?		No	1	4	None	
Desirability	Is the accommodation family accommodation?		No	1	4	None	
Desirability	Has the property adequate parking (garage or space)?		No	1	4	None	
Desirability	Does the dwelling have a garden or balcony? Yes = 5 No = 1		Yes	1	5	None	
Desirability	Is the property let locally?		Yes	1	5	None	

Figure 18: social value export sheet

3. Once you have completed the spreadsheet, save it to your computer and then go back into the software and click on ‘Import...’



Figure 19: import function

4. Choose the file you have saved and click on ‘Import’ to update the software with your changes.

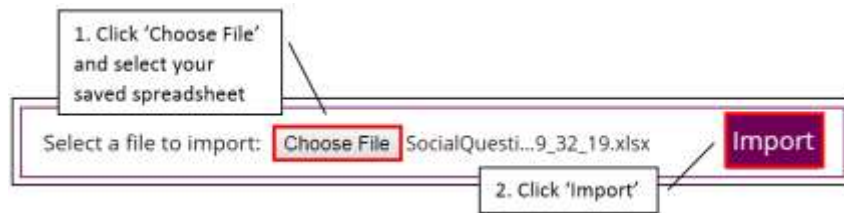


Figure 20: choose file to import

- The questions will now be updated with any amendments made. If there were any errors in the spreadsheet, the following error message will appear;



Figure 21: import failed

A further spreadsheet will automatically download listing reasons why the file did not upload. Go back into your saved spreadsheet to make the necessary corrections and then import it.

## 5.2 Question Templates

Use 'Question Templates' to view existing or create a new template. You can select from a list the questions you want to add, or you can amend questions for a previously saved template.

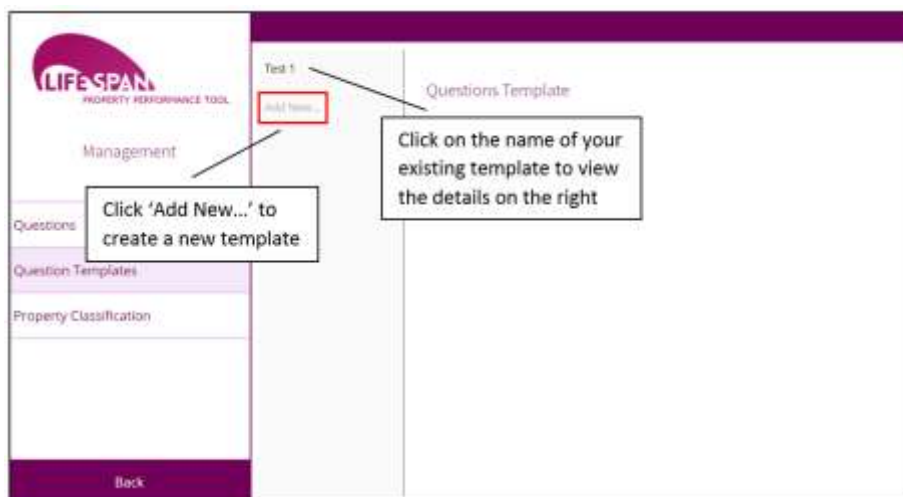


Figure 22: question templates

1. To create a new template, click 'Add New...'. You will then need to name the template and save before any questions can be added.

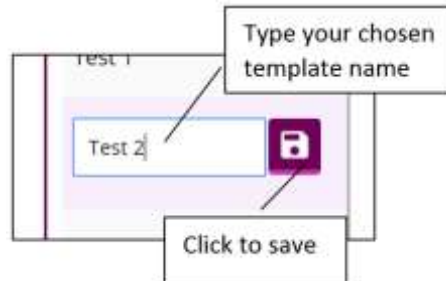


Figure 23: adding a new template

2. Click 'Add Questions to Template'.

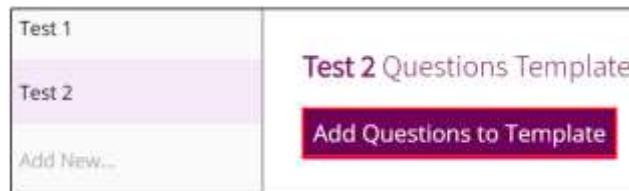


Figure 24: add questions to template

3. A list of all available questions shows on the right. To add any of these to your template, click and drag it into the box on the left. To remove a question, drag it back over to the list of questions. When finished, click 'Save Template' to update your changes.

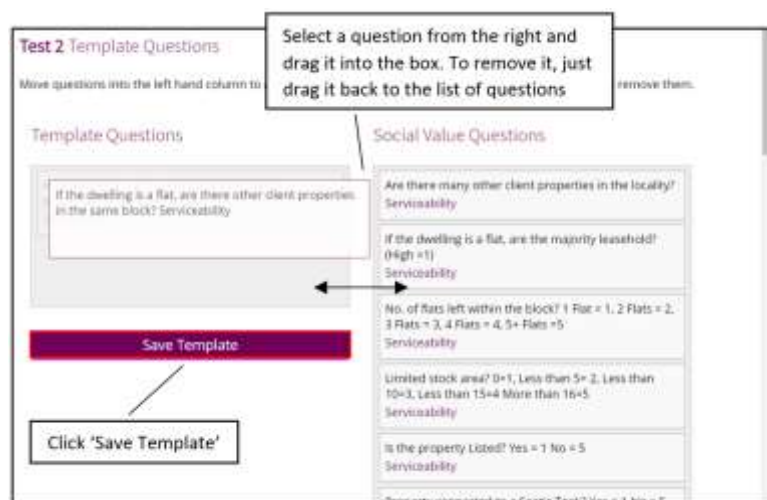


Figure 25: template questions

The questions selected will now be linked to your template.

4. To view all the linked questions for a template, select it from the list and they will be displayed on the right. You can amend these by clicking 'Modify Template Questions'.



Figure 26: modify template questions

This will bring up the template question screen again and from here you can remove existing or add in additional questions.

### 5.3 Property Classification

The Property Classification page allows you to link the PPT to a Lifespan Housing Grouping. This enables the software to customise questions based on the property type, dependant on which grouping is selected.

1. This section displays the list of property classifications available. Click next to the description to choose your classification and press 'Apply' to update the changes.

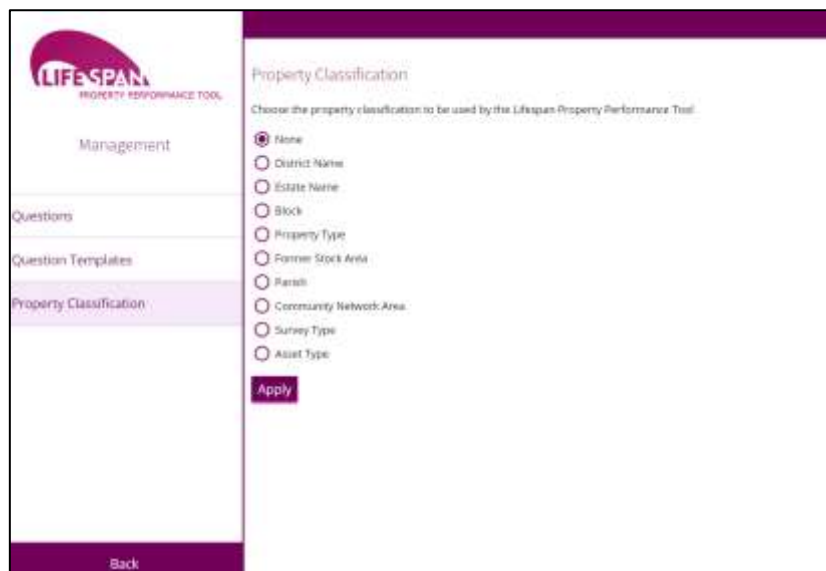


Figure 27: property classification

When you return to your question template, you will now see a classification links section under the list of questions.

The classification type is used to create a link between Lifespan Housing and Lifespan PPT. The links added will determine which questions are required for specific addresses, i.e. those which when filtered would come under the classification chosen.

- To set up a link, click on 'Link to Classification'.

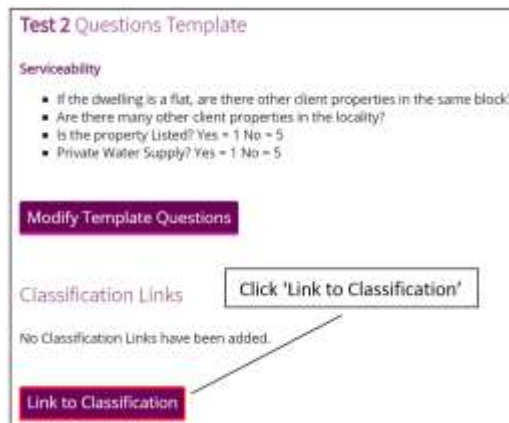


Figure 28: link to classification

Use the drop-down list to choose the property classification and set the default weighting, then click 'Save'.

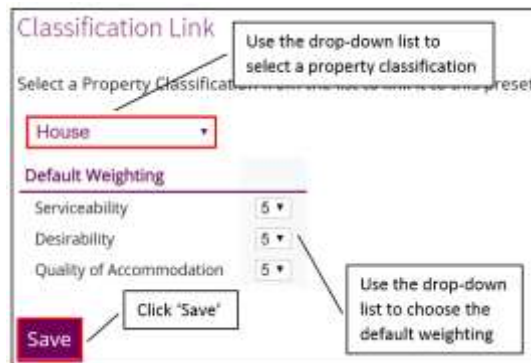


Figure 29: classification link

You can create multiple links per template, and they will appear as below for each classification type selected. To amend the type or default scores, click on the description to bring up the classification links page.

	Serviceability	Desirability	Quality of Accommodation
Block	5	5	5
Direct Access Flat	5	5	5
House	5	5	5

[Link to Classification](#)

Figure 30: classification links

- To change the property classification, return to the 'Property Classification' tab, click next to the description to choose your classification and press 'Apply' to update the changes.

**NOTE** Any existing classification links will be deleted when you change the property classification. Return to the question templates page to create links for the new classification chosen.

## 5.4 A.L.R Import/Export

To input data for the question templates created, you will need to use the import/export sheet within the Lifespan Housing A.L.R module.

The social value classification field will list the information stored in Lifespan PPT, so you must have created the link in PPT before attempting to enter any data here.

- Go to Lifespan Housing and click on the A.L.R module.



Figure 31: lifespan housing A.L.R module

Information here is shown in widget format, for more information on how to use widgets, please refer to section 4, 'The Summary Screen' within the Lifespan Web user manual.

- Scroll down to the social value widget and click 'Import/Export'.



Figure 32: social value widget

- Select the required social value classification from the drop-down list, then click 'Export'. A spreadsheet will download with all the addresses that match the classification type.



Figure 33: social value import/export



**NOTE** The downloaded spreadsheet will include **all** properties – this includes any addresses marked as sold or demolished. Please keep this in mind when updating details as this could affect counts of properties included.

- The spreadsheet will include a column for each of the questions within your template in PPT. To complete the spreadsheet, fill in the data for each row required and use the command 'Insert' to apply it to the software. Make sure to use the command 'Ignore' for any rows not being updated. Once completed, save the spreadsheet.



UPRN	Addressed	If the dwelling is a flat, are there other client properties in the same block?	Are there many other client properties in the locality?	Is the property Listed? Yes = 1 No = 5	Private Water Supply? Yes = 1 No = 5	Comment
T01000000000000000000	0-Weymouth-Crescent					
T01000000000000000000	1-91 Priests Close					
T01000000000000000000	2-91 Priests Close					
T01000000000000000000	3-91 Priests Close					
T01000000000000000000	4-91 Priests Close					
T01000000000000000000	5-91 Priests Close					
T01000000000000000000	6-91 Priests Close					
T01000000000000000000	7-91 Priests Close					
T01000000000000000000	8-91 Priests Close					
T01000000000000000000	9-91 Priests Close					
T01000000000000000000	10-91 Priests Close					
T01000000000000000000	11-91 Priests Close					
T01000000000000000000	12-91 Priests Close					
T01000000000000000000	13-91 Priests Close					
T01000000000000000000	14-91 Priests Close					
T01000000000000000000	15-91 Priests Close					
T01000000000000000000	16-91 Priests Close					
T01000000000000000000	17-91 Priests Close					
T01000000000000000000	18-91 Priests Close					
T01000000000000000000	19-91 Priests Close					
T01000000000000000000	20-91 Priests Close					
T01000000000000000000	21-Chapel-Crescent					
T01000000000000000000	2-Chapel-Crescent					
T01000000000000000000	3-Chapel-Crescent					
T01000000000000000000	4-Chapel-Crescent					
T01000000000000000000	5-Chapel-Crescent					
T01000000000000000000	6-Chapel-Crescent					
T01000000000000000000	7-Chapel-Crescent					
T01000000000000000000	8-Chapel-Crescent					
T01000000000000000000	9-Chapel-Crescent					
T01000000000000000000	10-Chapel-Crescent					
T01000000000000000000	11-Chapel-Crescent					
T01000000000000000000	12-Chapel-Crescent					
T01000000000000000000	13-Chapel-Crescent					
T01000000000000000000	14-Chapel-Crescent					
T01000000000000000000	15-Chapel-Crescent					
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T01000000000000000000	24-Chapel-Crescent					
T01000000000000000000	25-Chapel-Crescent					
T01000000000000000000	26-Chapel-Crescent					
T01000000000000000000	27-Chapel-Crescent					
T01000000000000000000	28-Chapel-Crescent					
T01000000000000000000	29-Chapel-Crescent					
T01000000000000000000	30-Chapel-Crescent					

Figure 34: social value export

- To update the software with the data inputted, go back to the social value import/export menu. Click 'Choose File' and select the file you have just saved, then press 'Import'.

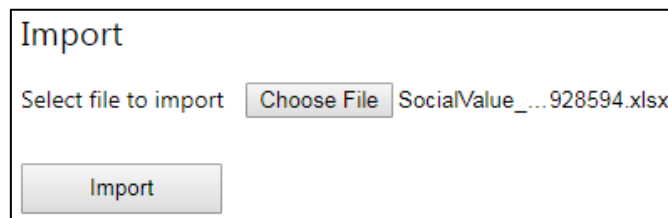


Figure 35: social value import

- Back on the A.L.R module screen, the social value widget will now list the questions and answers inputted for each updated address. These will be the default values that will be used to populate the social value tab in PPT.

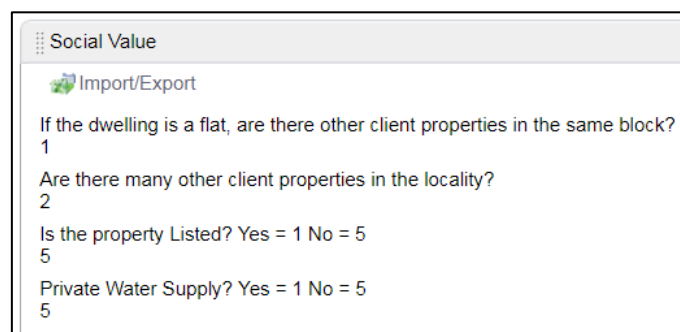


Figure 36: updated social value widget

**NOTE** You cannot import a spreadsheet which includes blank fields. If any row has missing information, the import will fail, and an error will appear on screen. The row should be updated to complete all fields or removed before re-importing the spreadsheet.

## 6. Property Detail

1. Go to the menu bar and select the heading 'Property Detail' to bring up the page.



Figure 37: property detail tab

The property detail page in this software is similar to the summary screen within Lifespan Housing, so here you have a general overview of the selected property showing;

- Full address and front elevation picture
- Location map
- Basic property details
- Survey information
- Relevant linked modules
- Property performance data
- Lifespan links

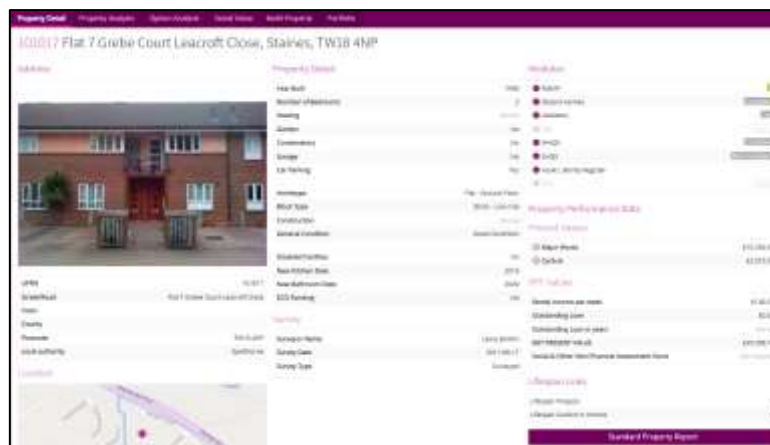


Figure 38: property detail page

## 7. Property Analysis

1. Go to the menu bar and select the heading 'Property Analysis' to bring up the page.

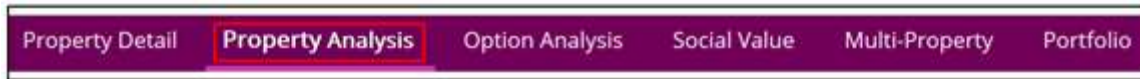


Figure 39: property analysis tab

The property analysis page is broken down into four main sections;

- Financial Detail
- Results & Output
- Inflation
- Analysis

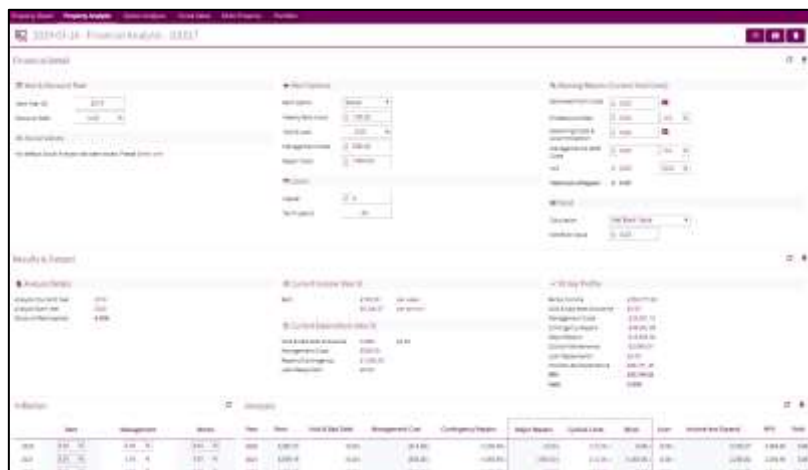


Figure 40: property analysis page

The financial detail section is divided further, enabling you to add in discount rates and details of costs and fees for related rent options, loans, repairs and yield. You can also enter social values and select a default social analysis scenario. The information entered here will populate the results and analysis underneath.

2. The page is split into different sections of data. Next to each section heading are two buttons. These give you the option to either refresh the data or export the data via an excel spreadsheet.
  - Refresh – the top section of each page is where data can be added or amended to manipulate the overall results for the properties. Clicking on refresh will update the results with any amendments made to the data.

- Export – clicking export will enable you to download an excel spreadsheet with all the data for each section. You can download this for individual sections, or all the data in the tab.

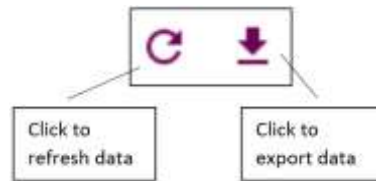


Figure 41: refresh and export buttons

4. Any fields in which data can be entered or altered are enclosed in a box. To enter a value, click into the box and either use the arrows on the right or type in the figure required.

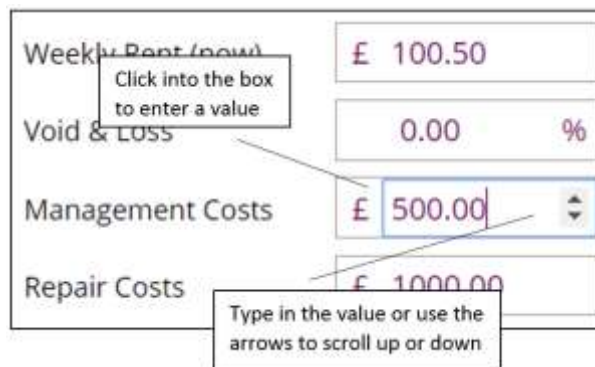


Figure 42: entering a value

5. Next to the value fields on some of the questions is a purple message box. Click in here to add a note for the specific row.

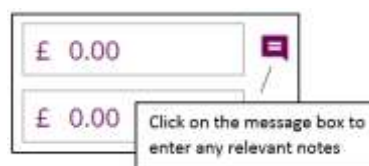


Figure 43: message box

The following notes window will appear. Enter notes as required and then click 'Save'.

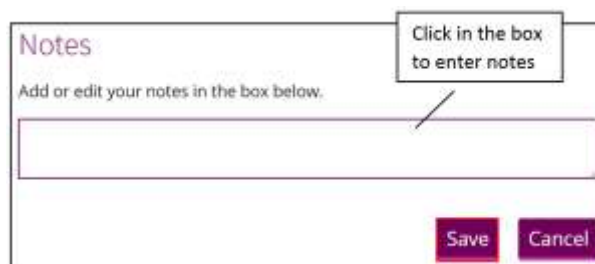


Figure 44: notes

- The section 'Backlog Repairs (Current Void Costs)' allows you to include within the scenario additional costs which wouldn't be transferred from Lifespan Housing as part of any planned works or costs.

Type in or use the arrows to scroll to the required costs for each field and click refresh to implement to the scenario.

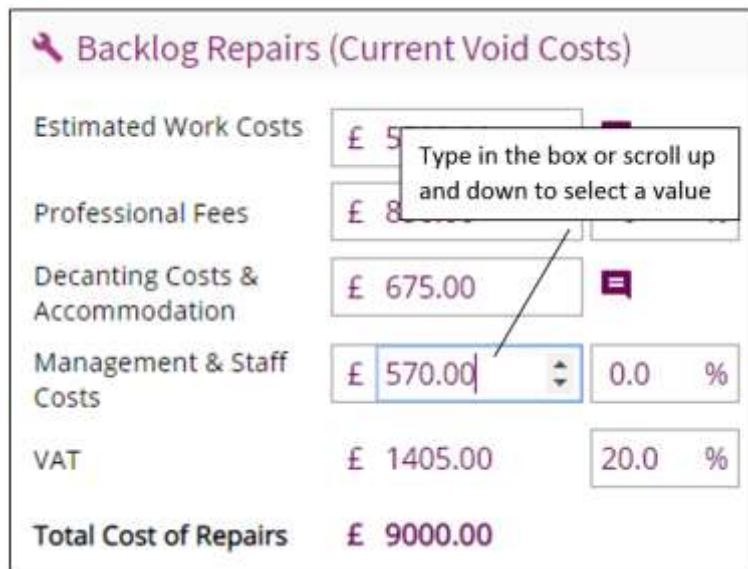
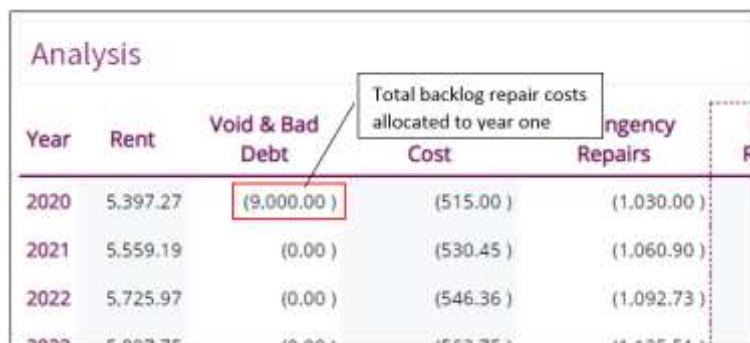


Figure 45: backlog repairs (current void costs)

Any values entered here, once refreshed, will be included in the 30-year profile and displayed within the analysis section under 'Void and Bad Debt'. These costs will always be applied to year one.



Year	Rent	Void & Bad Debt	Cost	Agency Repairs
2020	5,397.27	(9,000.00)	(515.00)	(1,030.00)
2021	5,559.19	(0.00)	(530.45)	(1,060.90)
2022	5,725.97	(0.00)	(546.36)	(1,092.73)

Figure 46: analysis: void and bad debt

- The yield section includes a drop-down so you can select to calculate using one of the following values;
  - Net Book Value
  - Market Value

- Existing Use Social Housing Value

Choose from the list next to 'Calculation' and the default value will be automatically populated from the asset liability register. If the data is stored in Lifespan Housing, you will see the figures displayed under the yield column in the 'Analysis' section once you click refresh.



Figure 47: yield calculation

You can also manually input a value by typing in the box or using the arrows.

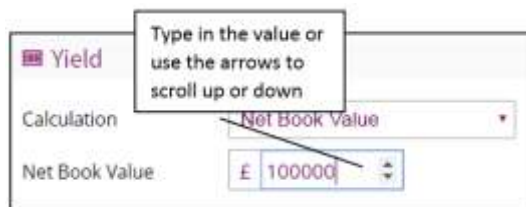


Figure 48: manually inputting a value

8. Under the 'Social Values' section is a link to select a default analysis. Click 'Select one'.

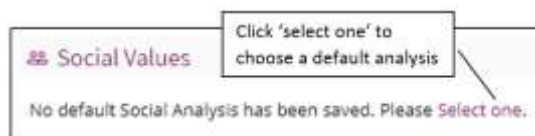


Figure 49: social values default

A dialog box will appear giving you the option to either use the default analysis for the specified property or select a previously saved scenario from the list. Once you have selected, click 'Apply'.

**NOTE** If a default analysis does not exist for the property, this option will be greyed out and you will have to select one from the drop-down list (the default value can only be set under the 'Social Value' heading).



Figure 50: saved social analysis scenarios

Back on the Property Analysis page you will now see the social values section has been updated with the details from the selected analysis. You can amend these figures by clicking in the box and entering a new value or by using the arrows to scroll up or down.

To change the scenario, click the link 'Use a different' from the text at the bottom of the section to bring up the saved social analysis scenarios box.

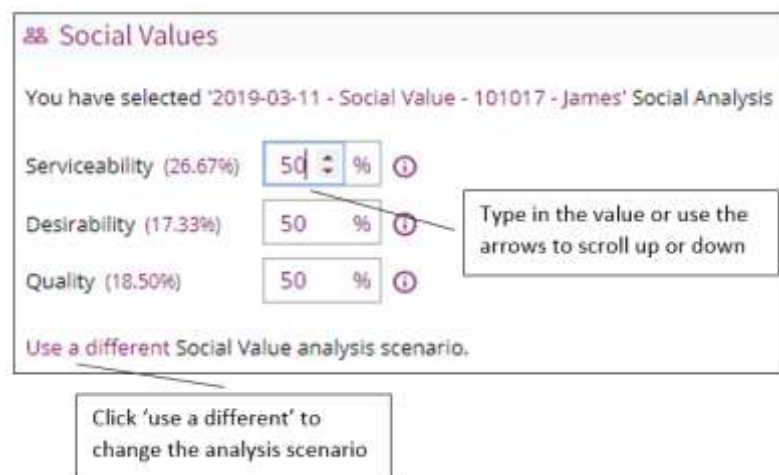


Figure 51: social values analysis

9. The analysis section will display the information as populated from Lifespan Housing and the A.L.R within the system or from the figures used within the scenario. You can however make further changes within the analysis section itself by amending the inflation rates and rate life or cost of major repairs or cyclical costs.
  - To amend any of the inflation rates, click into the relevant box and either type in a new figure or use the arrows to scroll up or down. Click the refresh button once done to implement the changes.

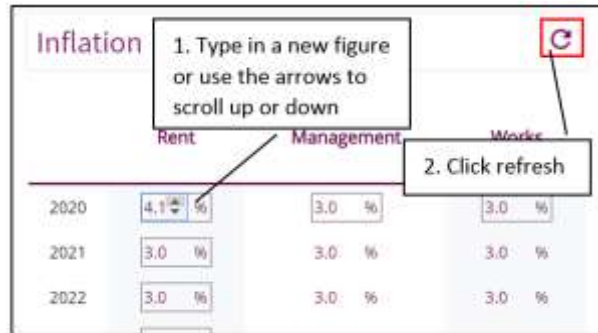


Figure 52: inflation rates

- The rate life and costs can be amended within a scenario for any property with major repair or cyclical costs.
- Click onto the cost to bring up a new window showing the breakdown of works.
- Press the timer icon next to the component you want to manipulate the details for.



Figure 53: work breakdown

- Slide the bars left or right to decrease or increase the cost and lifecycle. The new figures will show on the left of the screen and a shadow will remain to show the original cost and lifecycle of the component. Once completed, click Apply.

**NOTE** This will amend the figures for this scenario only and will not impact on any data stored within housing for rate lifecycles and costs.





Figure 54: override rate life and/or cost

## 8. Option Analysis

- Go to the menu bar and select the heading 'Option Analysis' to bring up the page.



Figure 55: option analysis tab

The option analysis page is broken down into four main sections;

- Option & Financial Detail
- Results & Output
- Inflation
- Analysis

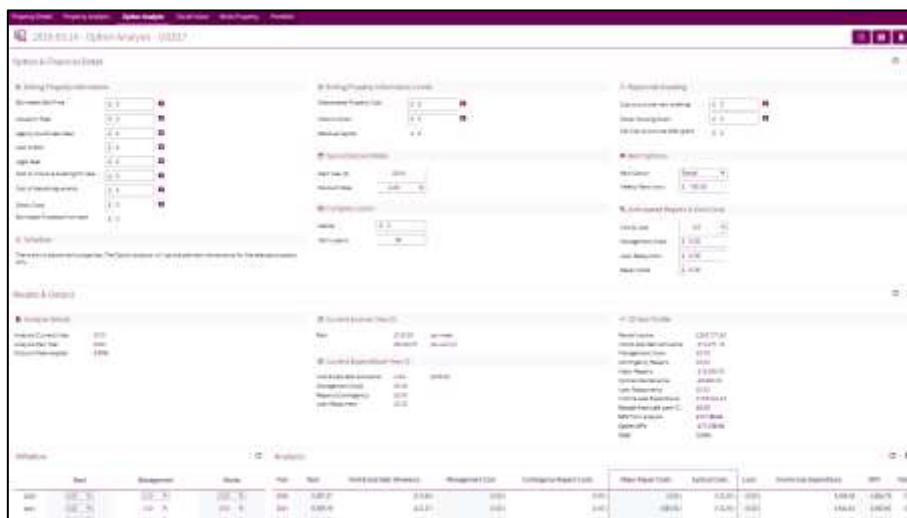


Figure 56: option analysis page

The option & financial detail section is divided, enabling you to add in specific details of costs and fees for related exiting properties, re-provision of dwellings, loans and repairs. The information entered here will populate the results and analysis underneath.

2. The page is split into different sections of data. Next to each section heading are two buttons. These give you the option to either refresh the data or export the data via an excel spreadsheet.
  - Refresh – the top section of each page is where data can be added or amended to manipulate the overall results for the properties. Clicking on refresh will update the results with any amendments made to the data.
  - Export – clicking export will enable you to download an excel spreadsheet with all the data for each section. You can download this for individual sections, or all the data in the tab.

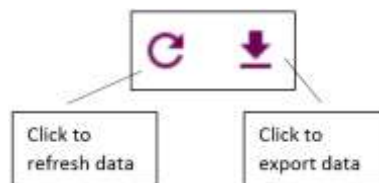


Figure 57: refresh and export buttons

3. Any fields in which data can be entered or altered are enclosed in a box. To enter a value, click into the box and either use the arrows on the right or type in the figure required.

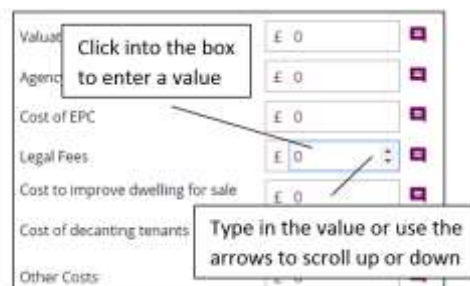


Figure 58: entering a value

4. Next to the value fields on some of the questions is a purple message box. Click in here to add a note for the specific row.



Figure 59: message box

The following notes window will appear. Enter notes as required and then click 'Save'.

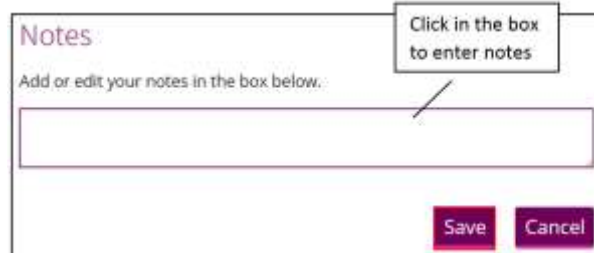


Figure 60: notes

## 9. Social Value

1. Go to the menu bar and select the heading 'Social Value' to bring up the page.



Figure 61: social value tab

The social value page is broken down into four main sections;

- Serviceability
- Desirability
- Quality of Accommodation
- Results & Output

The questions displayed in the first three sections are based on the initial set up of the templates in 'manage questions' within settings. Please see section 5. [Settings](#) for details of how to create these.

Each property is scored individually, using weighted assessments under each group heading which in turn provides a measure (%) for each of the chosen group headings (Serviceability, Desirability and Quality). Each of these scores are then brought together to provide an overall score for the entire analysis with an opportunity to again weight the group scores according to their respective levels of importance and impact. The table below illustrates the methodology adopted.

Social Value (Weighted) Assessment Illustrated			
<b>Maximum Score</b>			
	Score	Weighting (1-5)	Weighted Score
Serviceability	100%	3	33.33%
Desirability	100%	2	22.22%
Quality	100%	4	44.44%
<b>Social Value Score</b>			<b>100.00%</b>
<b>Below Maximum Score</b>			
	Score	Weighting (1-5)	Weighted Score
Serviceability	50%	3	16.67%
Desirability	20%	2	4.44%
Quality	60%	4	26.67%
<b>Social Value Score</b>			<b>47.78%</b>

Figure 62: social value (weighted) assessment illustrated

The scores and weightings are displayed next to the questions and a graph is produced on the far right, giving you a breakdown of scores achieved.

In the example below, the scores have been populated by the defaults applied to the associated question template. When a default score is being used, the software will show this by displaying a grey background.

	Score (1-5)	Weighting (1-5)	Total Score
If the dwelling is a flat, are there other client properties in the same block?	4	5	4.0
If the dwelling is a flat, are the majority leasehold? (High =1)	5	4	4.0
Are there many other client properties in the locality?	3	5	3.0
<b>Total Score</b>			<b>11.0</b>
			<b>73.3%</b>

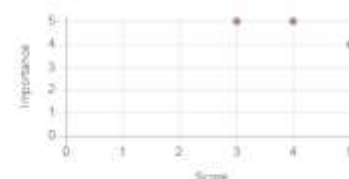


Figure 63: serviceability questions and scores

When the scores are being populated by Lifespan Housing, they will be presented on a green background to show the information is linked to the A.L.R. Please see section [5.4](#) [A.L.R Import/Export](#) for information on how to import social value scores.

**NOTE** If any scores are amended, after refreshing the page, scores for all categories will appear on a grey background. This is to show that the scores are no longer reflecting information from Lifespan Housing but have been adjusted as part of the scenario.

	Score (1-5)	Weighting (1-5)	Total Score
Is the accommodation in good decorative order?	2 ▼	5 ▼	2
Is the house energy efficient (EPC A-G score A=5, G=0)	1 ▼ ⓘ RdSAP Bands: G ▼		1
Is the Kitchen in good condition?	2 ▼	5 ▼	2
Is there adequate storage in the dwelling?	2 ▼	5 ▼	2
Central heating	2 ▼	5 ▼	2
	Total Score		9 36.00%

Figure 64: quality of accommodation questions and scores

If a social value question has been linked to RdSAP, in PPT the score will be displayed with the information icon ⓘ which when you hover over will explain which rating the score corresponds to. The ratings and scores are calculated as follows;

- A + B = 5
- C = 4
- D = 3
- E = 2
- F + G = 1

The two icons below are available to the right of the section headings. One is to manage the list of questions displayed and the other is to refresh the data.



Figure 65: manage list and refresh icons

2. Clicking on 'Manage List' enables you to amend the list of questions displayed on screen. Once this is pressed, a window will pop up listing all the available questions. To remove any of these from the page, untick the box next to the relevant question. Click 'Apply' and when you go back to the main screen, the unticked questions will no longer appear.

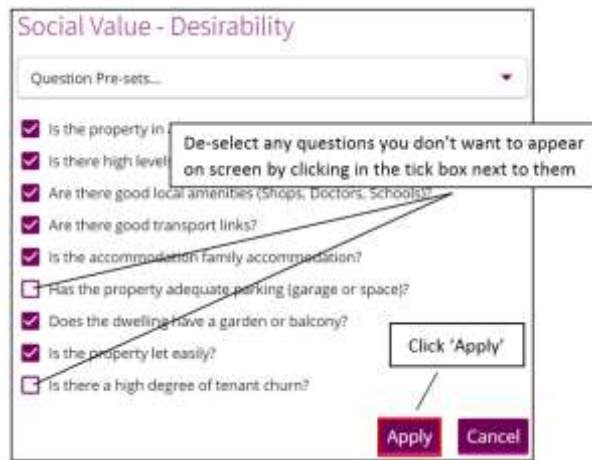


Figure 66: social value question pre-sets

3. Clicking on 'Refresh' will update the result outputs from the data inputted so you can get an accurate representation after each change.

At the bottom of the page, the results are shown for the three previous sections. Results are displayed in graph and percentage outputs to give you an easy understanding of the individual and combined scores across the different areas.

There is also the option here to further weight the groupings according to importance and impact by adjusting the figures under 'Criteria'. Once refreshed, this section will reflect the revised data.

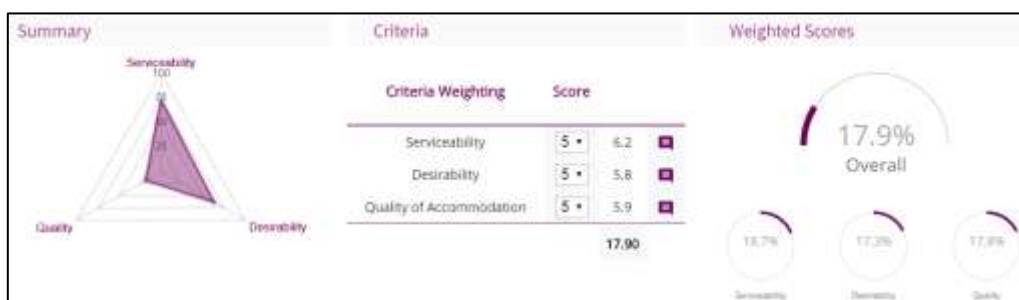


Figure 67: results and outputs

4. Next to the title bar at the top of the screen is the 'Analysis Details' button. This is the same for each of the headings, however in social value there is an additional functionality.
  - Click on 'Analysis Details'.

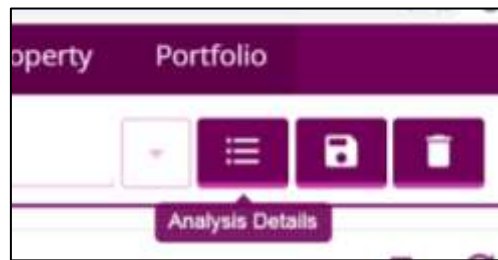


Figure 68: analysis details

- The tick box below the notes box is to set the property default. This means that the data collected on this page, once saved, will act as the default social values and populate sections of both the 'Property Analysis' and 'Multi-Property' pages. To set as default, tick the box and click save.

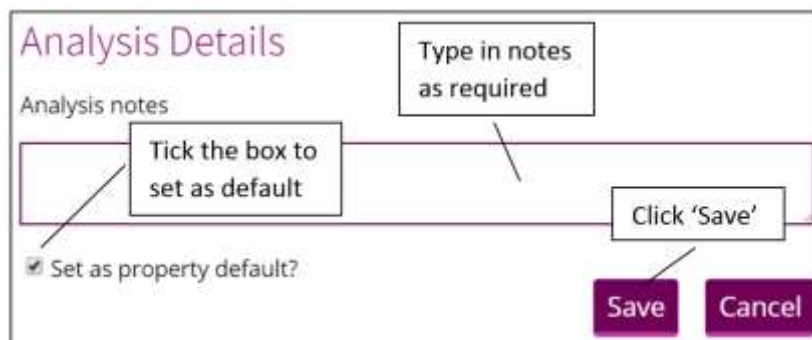


Figure 69: analysis details property default

## 10. Multi-Property

1. Go to the menu bar and select the heading 'Multi-Property' to bring up the page.



Figure 70: multi-property tab

For any data to display here, you will need to select one or more properties from the address list. If none are selected, an error message will appear prompting you to do so;

**No properties selected!** Please select one or more properties from your address list and then click on one of the 'Refresh' buttons below to re-run the analysis.

Figure 71: error message - no properties selected

The multi-property page is broken down into four main sections;

- Financial Detail
- Results & Output
- Analysis
- Map

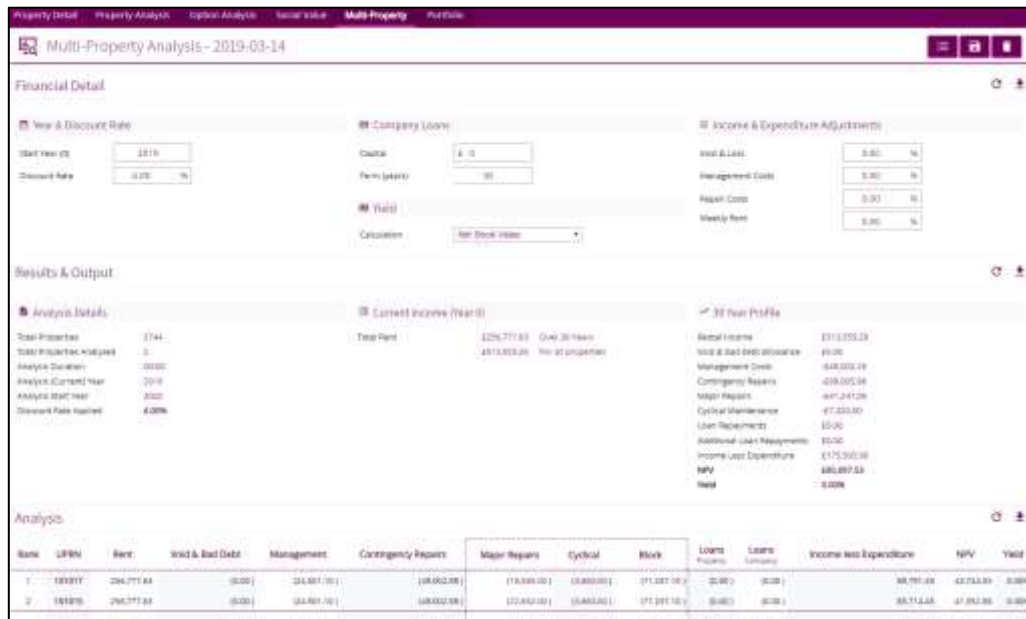


Figure 72: multi-property page

- Fields in which data can be entered or altered are enclosed in a box. To enter a value, click into the box and either use the arrows on the right or type in the figure required.

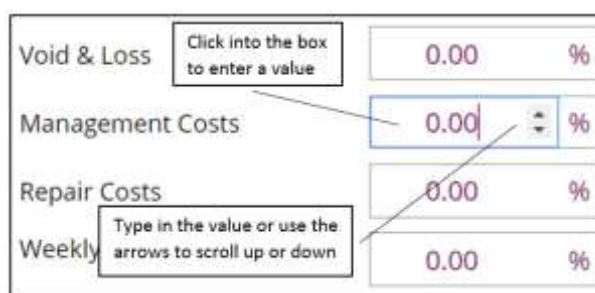


Figure 73: entering a value

On this page you can only amend fields within the financial detail section, data can be input for the year and discount rate, company loans, yield and income/expenditure. Information in the remaining sections is automatically populated from the individual property data and is used to calculate the results and outputs as shown below.



The yield section includes a drop-down so you can select to calculate using one of the following values;

- Net Book Value
- Market Value
- Existing Use Social Housing Value

Choose from the list next to ‘Calculation’ and the default value will be automatically populated from the asset liability register data stored in Lifespan Housing.

**NOTE** If no values are set for ALR in Lifespan Housing, the yield will not be calculated.

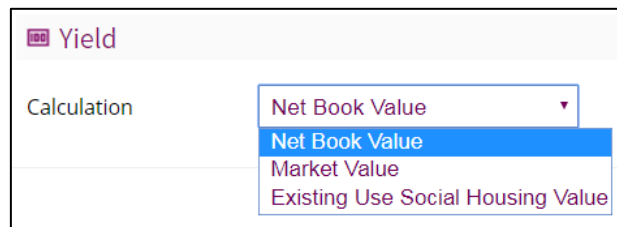


Figure 74: yield calculation

- Information recorded in the financial detail section will go towards populating the results and output. Here you can see analysis details and current income details, along with a 30-year profile for all selected properties.



Analysis Details		Current Income (Year 0)		30 Year Profile	
Total Properties	2744	Total Rent	£200,384.93	Rental Income	£1,402,694.52
Total Properties Analysed	7	Over 30 Years		Void & bad debt allowance	£0.00
Analysis Duration	06:00			Management Costs	-£147,006.60
Analysis (Current) Year	2018	For all properties	£1,402,694.52	Contingency Repairs	-£294,017.88
Analysis Start Year	2019			Major Repairs	-£265,226.00
Discount Rate Applied	4.00%			Cyclical Maintenance	-£21,960.00
				Loan Repayments	£0.00
				Additional Loan Repayments	£0.00
				Income Less Expenditure	£674,484.04
				NPV	£334,460.98
				Yield	0.00%

Figure 75: multi-property results and output

- The ‘Analysis’ section gives you a breakdown for all properties selected, showing you data in table format with a separate row for each UPRN. The information displayed is taken from individual properties and reflects any changes made within the software under each of the previous tabs.

Rank	UPRN	Rent	Void & bad debt allowance	Management Costs	Contingency Repairs Costs	Major Repair Costs	Cyclical Costs	Block Costs	Loans Selected (properties)	Loans Company	Income less Expenditure	NPV	Yield
1	101017	256,777.63	(0.00)	(24,501.10)	(49,002.98)	(22,675.00)	(3,660.00)	(57,011.60)	(0.00)	(0.00)	156,938.55	80,441.71	0.00
2	101289	226,116.90	(0.00)	(24,501.10)	(49,002.98)	(18,145.00)	(3,660.00)	(0.00)	(0.00)	(0.00)	130,807.82	70,642.91	0.00
3	101276	233,782.80	(0.00)	(24,501.10)	(49,002.98)	(22,575.00)	(3,660.00)	(0.00)	(0.00)	(0.00)	134,043.78	69,611.53	0.00
4	101030	228,672.51	(0.00)	(24,501.10)	(49,002.98)	(23,115.00)	(3,660.00)	(0.00)	(0.00)	(0.00)	128,193.43	64,085.17	0.00
5	101301	226,116.90	(0.00)	(24,501.10)	(49,002.98)	(26,427.00)	(3,660.00)	(0.00)	(0.00)	(0.00)	122,525.82	61,899.45	0.00
6	101253	231,227.72	(0.00)	(24,501.10)	(49,002.98)	(42,839.00)	(3,660.00)	(0.00)	(0.00)	(0.00)	112,024.64	56,774.20	0.00
7	101331	0.00	(0.00)	(0.00)	(0.00)	(110,050.00)	(0.00)	(0.00)	(0.00)	(0.00)	-110,050.00	-68,993.90	0.00
		1,402,694.52	(0.00)	(147,006.60)	(294,017.88)	(265,226.00)	(21,960.00)	(57,011.60)	(0.00)	(0.00)	674,484.04	334,460.98	0.00

Figure 76: multi-property analysis

There are three additional columns which are only visible if a social analysis has been applied for the property. These columns show data for the social score, social value and social NPV.

Click on the UPRN for the property where you want to see the social values, to bring up the list of options;

- Property Analysis – select to be taken to the property analysis tab for the address selected.
- Apply Saved Analysis... – select to choose from a list of previously saved scenarios.
- Apply New Analysis... – select to enter new analysis details on the current screen.

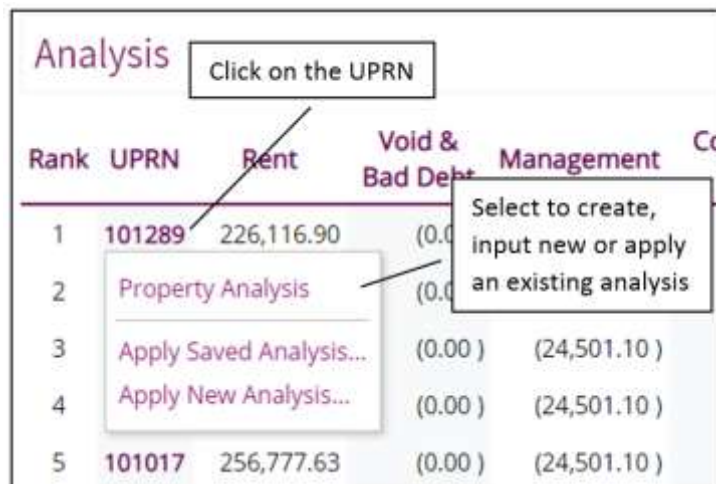



Figure 77: analysis options

To apply a previously saved analysis, choose the option from the list above to open the dialog box. Click the arrow to the right of 'Select analysis...' and choose from the selection below. Click 'Apply' to save.



Figure 78: saved property analysis scenarios

Back in the multi-property tab, you will still only see the same information. To see any applied changes here, click the refresh button (  ) within the analysis section.

**NOTE** The 'Social Score' column is populated automatically if a default social value has been set for the properties selected.

The social NPV is calculated by applying social value scores to individual components within the financial analysis, to derive a 'social return' which can in turn be included within the financial analysis. The 'overall score' is the sum of the financial analysis plus the social value analysis, which is reflected in an overall NPV and yield analysis. The graph below illustrates the methodology adopted for the calculation.

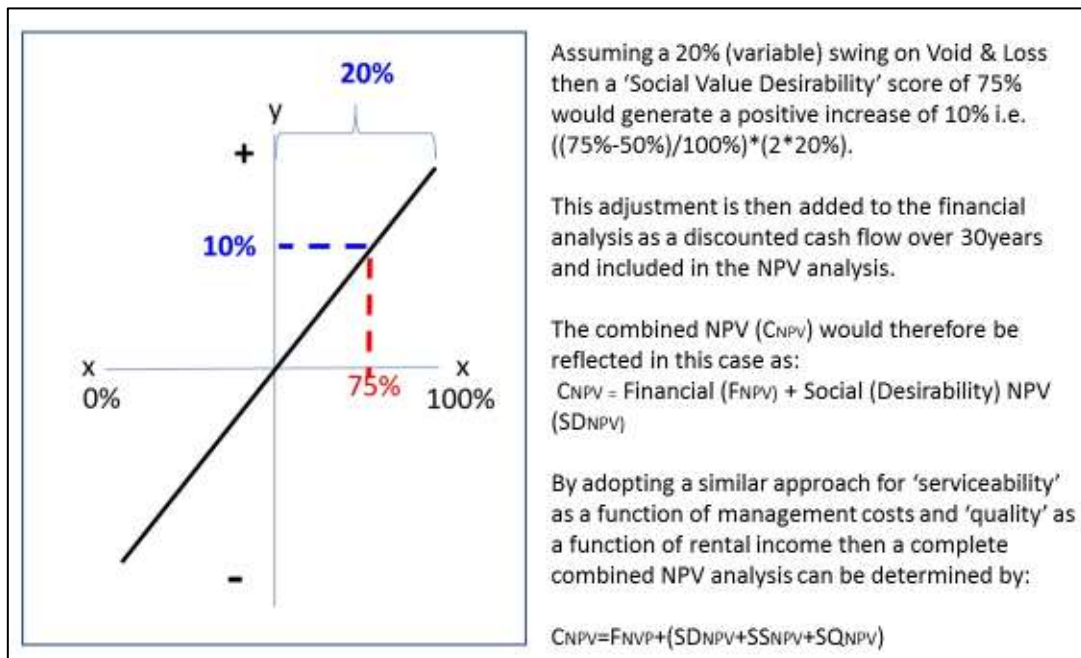


Figure 79: social NPV

- The last section in the multi-property tab displays a map of the area. Each of the selected properties is represented with a location marker so you know the area they are in and you can see at a glance where the properties sit in relation to each other.

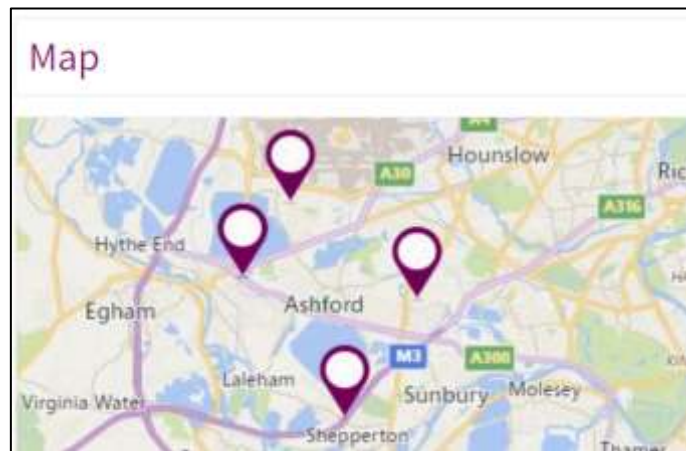



Figure 80: location map

To the right of the map heading bar is an icon (  ) which when pressed will enlarge the map to display it in full screen view. Click the X to return to the multi-property page.

## 11. Portfolio

1. Go to the menu bar and select the heading 'portfolio' to bring up the page.



Figure 81: portfolio tab

The portfolio page is broken down into four main sections;

- Financial Detail
- Results & Output
- Inflation
- Analysis

Here you are presented with an overview of the total housing stock in the company database on Lifespan. The page is a useful forecasting tool which can be manipulated by altering the data in the previous tabs for specific properties, as well as in the financial detail section of this page to amend some data for all properties.

2. Within 'financial detail' there are three further sections, giving you the option to include information relating to the year & discount rate, company loans and rent options. Anything added in here will update the analysis section at the bottom of the page.

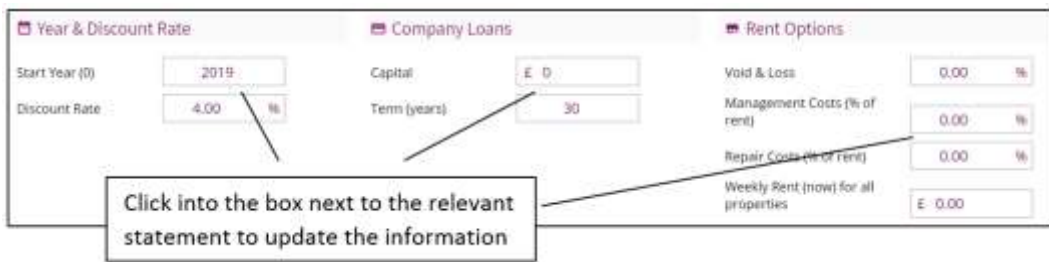


Figure 82: portfolio financial detail

Once you have updated the section, click on refresh to apply the changes to the analysis section below.

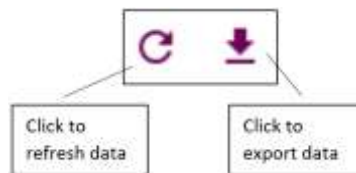


Figure 83: refresh and export buttons

Clicking on the downwards arrow to the right will export the data to an excel spreadsheet. You have the option to export the data from all or one section. Tick next to each section you want to include and then click 'Export'.



Figure 84: export scenario

3. The Results & Output section displays results based on the information you have inputted previously in the software. Figures and percentages are calculated and split into categories as shown below for analysis details, current income, current expenditure and a 30-year profile. You are unable to amend the information within this section; however, you can refresh or export the data using the icons to the right of the heading.

Analysis Details			Current Income (Year 0)		30 Year Profile	
Total Properties	2744		Rent for ALL properties per week	£160,041.60	Rental Income	£408,906,230.28
Total Properties Analysed	2274				Void & bad debt allowance	£0.00
Analysis Duration	00:03		per annum	£8,344,569.02	Management Costs	£0.00
Analysis (Current) Year	2019				Contingency Repairs	£0.00
Analysis Start Year	2020				Major Repairs	-£103,309,450.06
Discount Rate Applied	4.00%				Cyclical Maintenance	-£5,345,760.00
					Loan Repayments	£0.00
					Additional Loan Repayments	£0.00
					Income Less Expenditure	£300,251,020.22
					NPV	£150,718,504.90
					Yield	0.00%

Figure 85: results and output

- At the bottom of the portfolio page you will find the inflation and analysis sections. This provides you with an overview for a timeline of 30 years, showing potential income and expenditure based on the data inputted previously and the inflation rates provided on the left.

1. Use the arrows to change the inflation rate or type a specific figure into the box

Inflation			Analysis												
Rent	Management	Works	Year	TOTAL Rent	Void & bad debt allowance	Management Cost	Contingency Repairs Costs	Major Repair Costs (£K) & (B)000	Cyclical Costs (£K) & (B)000	Loans ALL properties	Company Loans	Income less Expenditure	NPV	Yield	
3.00%	3.00%	3.00%	2020	6,374,506.00	(0.00)	(0.00)	(0.00)	(4,513,217.50)	(178,192.00)	(0.00)	(0.00)	3,803,488.50	3,753,362.11	0.00	
3.00%	3.00%	3.00%	2021	6,852,752.77	(0.00)	(0.00)	(0.00)	(2,975,147.73)	(178,192.00)	(0.00)	(0.00)	5,699,413.54	5,269,428.20	0.00	
3.00%	3.00%	3.00%	2022	6,118,335.67	(0.00)	(0.00)	(0.00)	(4,306,826.31)	(178,192.00)	(0.00)	(0.00)	4,343,317.36	3,861,068.93	0.00	
3.00%	3.00%	3.00%	2023					(4,022,629.50)	(178,192.00)	(0.00)	(0.00)	5,191,364.45	4,427,186.67	0.00	
3.00%	3.00%	3.00%	2024					(3,376,881.91)	(178,192.00)	(0.00)	(0.00)	6,138,588.62	5,545,277.08	0.00	
3.00%	3.00%	3.00%	2025					(5,304,566.66)	(178,192.00)	(0.00)	(0.00)	3,881,093.15	3,067,330.00	0.00	

2. Click refresh to see the updated analysis data

Figure 86: inflation and analysis

- To amend the inflation rate for a specific year, click into the box next to the corresponding year and either use the arrows to increase/decrease the rate or type in the required figure. Press refresh to see these changes in the analysis section.

## 12. Dashboard and Reporting

The dashboard and reporting area can be accessed from each module within the software, with the exception of the Property Detail page. The functionality will vary dependant on the module selected, as a different selection of graphs and reports are available for each.

1. To access the dashboard, you must first save your current scenario. Then hover over the icon to the left of your scenario description and click 'Dash'.



Figure 87: dash

At the bottom of the screen you will see a library section. This displays all of the graphs and charts currently available for use within the software.



Figure 88: dashboard library

2. Double click on any of the icons, you can choose one or multiple graphs and each will open to display the information on the main screen.



Figure 89: property analysis dashboard

3. Hovering over the graphs will give you a further analysis of the financials, providing the actual figures for each of the variables listed.

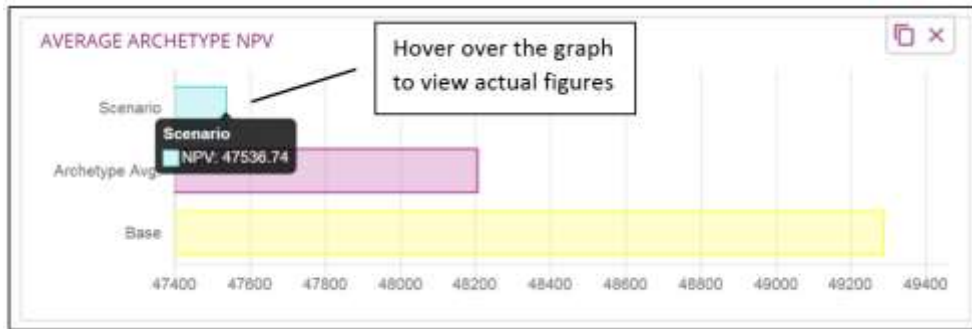


Figure 90: average archetype NPV

4. To remove a graph from the dashboard, click on the 'X' in the top right corner of the graph window. Then click 'yes' when prompted, to confirm removal.



Figure 91: removing a graph

5. There is also a reset button located to the right of the scenario description at the top of the screen. Click the bin icon to remove all graphs currently being displayed.

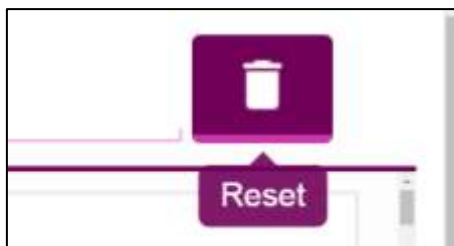


Figure 92: reset button

6. You can save or copy any graph by right-clicking on it and selecting the required option.

The reporting wizard allows you to display the selected information for one or multiple scenarios, enabling you to compare the details side by side.

1. To access the reporting wizard, hover over the icon to the left of your scenario description and click 'Reporting'.





Figure 93: reporting

Working in the same way as the dashboard, all available reports are shown in the library at the bottom of the screen.



Figure 94: reporting library

2. Double clicking on any of the icons will open a window where you can select the scenario you want to include in the report. Choose a saved scenario from the drop-down list and click apply to open the report.

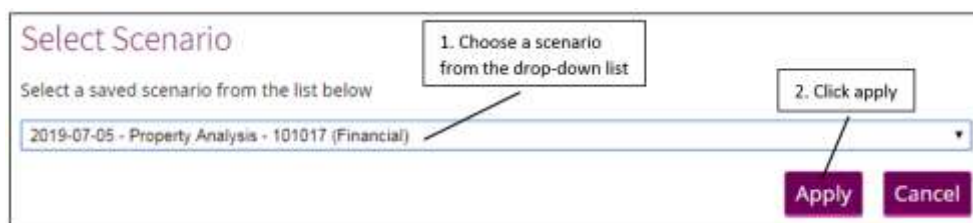


Figure 95: select scenario

You can choose one or multiple reports and each will open to display the information on the main screen.

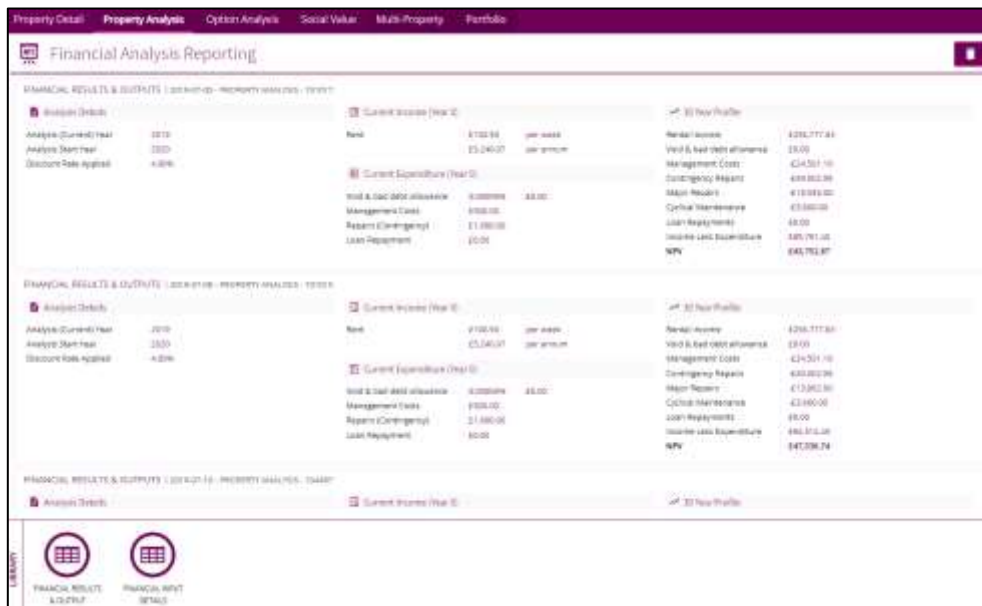


Figure 96: property analysis reporting

- As with the dashboard, you can click the bin icon to reset the screen and clear the reports currently being displayed.

## Appendix One: Change Log

Date	Version	Changes
04/01/2019	1.0	First version written.
06/03/2019	2.0	Updated to reflect new release.
26/03/2019	3.0	Updated to reflect new release.
10/07/2019	4.0	Updated property analysis, social value and multi-property sections. Added a dashboard/reporting section.