

# **Fire Safety System**

1 — Last update: 2017/01/19

PSI2000 Ltd

# Table of Contents

- INTRODUCTION ..... 3
- QUICK START GUIDE ..... 4
- EXAMPLE WALK THROUGH ..... 6
  - FSO Creates first Assessment for a Property ..... 7
  - FSO Completes Assessment..... 8
  - FSO Team Receives Notification for Assessment Validation ..... 9
  - FSO Validates Assessment..... 10
  - FSS Plans the Next Assessment after Validation ..... 11
  - Action Notification is sent to FST Team Leaders ..... 12
  - FST Starts implementing the Actions ..... 13
  - FST Completes Actions..... 14
  - FSO Notifications ..... 15
  - FST Notification ..... 16
  - FSO starts the next Assessment for a Property ..... 17
- LOGGING ON ..... 18
  - FORGOT USER NAME ..... 19
  - FORGOT PASSWORD ..... 20
- HOW TO ..... 21
  - HOW TO CREATE ASSESSMENT ..... 22
  - HOW TO OPEN ASSESSMENT ..... 25
  - HOW TO ENTER ASSESSMENT DATA..... 26
  - HOW TO ENTER ASSESSMENT QUESTIONNAIRE ..... 35
  - HOW TO COMPLETE ASSESSMENT..... 40
  - HOW TO VALIDATE ASSESSMENT ..... 41
  - HOW TO INCOMPLETE ASSESSMENT ..... 46
  - HOW TO CREATE A NEW VERSION FOR ASSESSMENT ..... 47
  - HOW TO DELETE ASSESSMENT ..... 49
  - HOW TO PREVIEW ASSESSMENT ..... 50
  - HOW TO OPEN ACTION ..... 52
  - HOW TO UPDATE ACTION ..... 53
  - HOW TO COMPLETE ACTION ..... 57
  - HOW TO SEARCH FOR ASSESSMENT ..... 59
  - HOW TO SEARCH FOR ACTION ..... 60
  - HOW TO DELETE ACTION..... 61

**DASHBOARD ..... 62**

Property Overview ..... 63

Assessment Due ..... 64

Assessment Overdue ..... 65

Action View ..... 66

**REPORTS..... 67**

**SETUP ..... 68**

USERS ..... 69

TEAMS ..... 73

CONFIGURATION ..... 74

PROPERTIES ..... 75

QUESTIONNAIRE TEMPLATES ..... 78

    Questionnaire Sections..... 82

    Normal Questions ..... 86

    Significant Findings and Defects ..... 93

DESCRIPTIVE TEXTS ..... 98

OPTIONS..... 102

COMPLIANCE RULE FOR ASSESSMENT SECTION ..... 103

E-MAIL NOTIFICATION ..... 104

GROUPS ..... 106

NEXT ASSESSMENT DATE ..... 107

**GLOSSARY ..... 108**

ACTION ..... 109

ACTION PRIORITY ..... 110

ASSESSMENT..... 111

ASSESSMENT SECTION ..... 112

ASSESSMENT SECTION QUESTION ..... 113

ASSESSMENT TYPE..... 114

COMPLIANCE LEVEL..... 115

PRIORITY ..... 116

SIGNIFICANT FINDINGS & DEFECTS ..... 117

TEAM..... 118

STATUS..... 119

    ACTION ..... 120

        ACTION – NOT STARTED ..... 121

        ACTION – IN PROGRESS..... 122

        ACTION – COMPLETED ..... 123

ASSESSMENT .....	124
ASSESSMENT-PLANNED .....	125
ASSESSMENT-IN PROGRESS .....	126
ASSESSMENT-COMPLETED .....	127
ASSESSMENT-VALIDATED .....	128
ROLES .....	129
Admin .....	130
User Interface – Admin .....	131
Action – Admin .....	132
Fire Safety Officer .....	133
User Interface – Fire Safety Officer .....	134
Action – Fire Safety Officer .....	135
Fire Safety Team .....	136
User Interface – Fire Safety Team .....	137
Action – Fire Safety Team .....	138
<b>USER INTERFACE .....</b>	<b>139</b>
GRID .....	140
MENU .....	144

# INTRODUCTION

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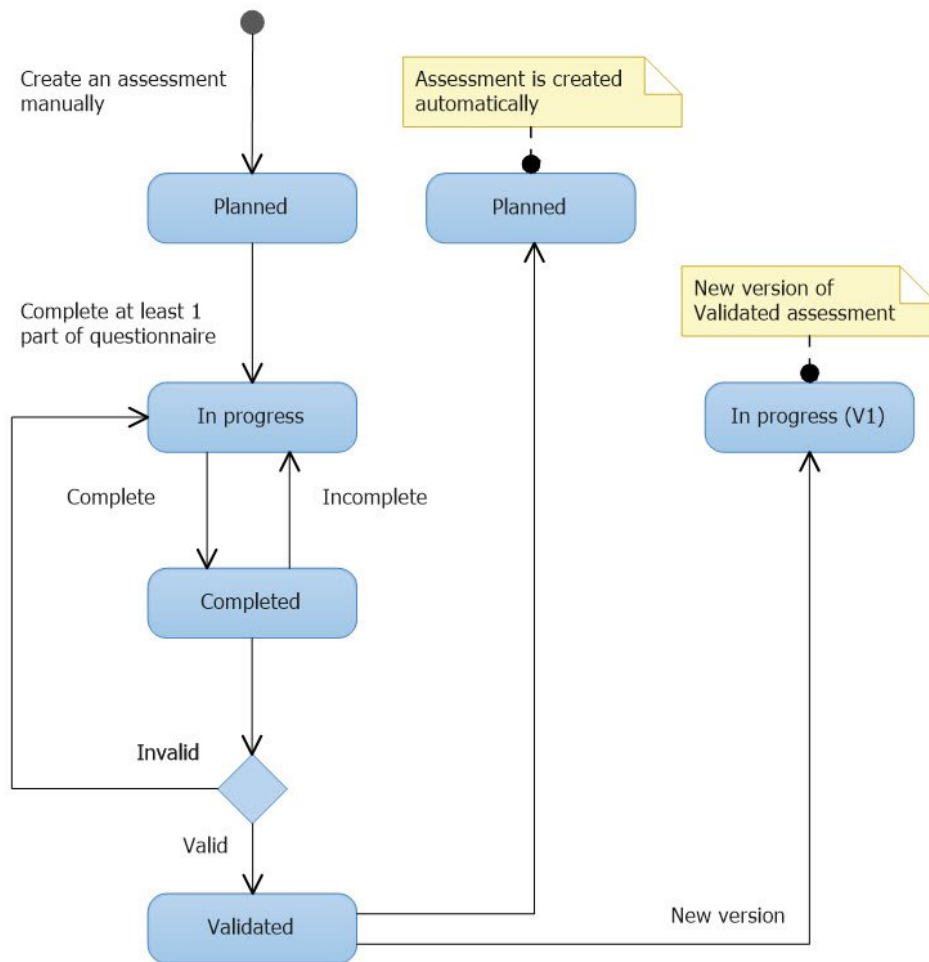
The manual provides information on how to use the Fire Safety System (FSS).

# QUICK START GUIDE

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\* After clicking on any of the links below use the back page button on your browser to get back to the original page.

1. Make sure you have a user login i.e. username and password. If you do not know your username and password, talk to your system administrator. If you are the administrator see how to [Add Users](#);
2. Make sure you know what Role has been assigned to your user name. For more information see [Roles](#)
3. A user with the role [Fire Safety Officer](#) can [Create](#), [Update](#), [Complete](#), [Validate](#) Assessment, [Open](#), [Update](#) and [Complete](#) Actions during Assessment;
4. A user with the role [Fire Safety Team](#) can [Open](#), [Update](#) and [Complete](#) Actions.
5. To see how you can complete the activities click on the relevant Action link from the [Roles and Actions](#) table below;
6. To see what activities are possible and which screens are available for a Role click on the relevant Role link from the [Roles and Actions](#) table below;
7. From the creation of an Assessment to the validation, each Assessment will have a different status. More information is provided in the [Assessment Status](#) section.



8. From the creation of an Action to the completion, each Action will have a different status. More information is provided in the [Action Status](#) section.

## Roles and Actions:

Roles	Actions
<a href="#">Fire Safety Officer</a>	<a href="#">Create an Assessment</a>
<a href="#">Fire Safety Officer</a>	<a href="#">Update Assessment</a>
<a href="#">Fire Safety Officer</a>	<a href="#">Complete Assessment</a>
<a href="#">Fire Safety Officer</a>	<a href="#">Validate Assessment</a>
<a href="#">Fire Safety Team</a> / <a href="#">Fire Safety Officer</a>	<a href="#">Open Action</a>
<a href="#">Fire Safety Team</a> / <a href="#">Fire Safety Officer</a>	<a href="#">Update Action</a>
<a href="#">Fire Safety Team</a> / <a href="#">Fire Safety Officer</a>	<a href="#">Complete Action</a>

# EXAMPLE WALK THROUGH

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[FSO Creates first Assessment](#)

[FSO Completes Assessment](#)

[FSO Team Receives Notification for Assessment Validation](#)

[FSO Validates Assessment](#)

[FSS Plans the Next Assessment after Validation](#)

[Action Notification is sent to FST Team Leaders](#)

[FST Starts implementing the Actions](#)

[FST Completes Actions](#)

[FSO Notifications](#)

[FST Notifications](#)

[FSO starts the next Assessment for a Property](#)



# **FSO Creates first Assessment for a Property**

This workflow describes how an Assessment is created for a Property for the first time.



After clicking on any of the links below use the back page button on your browser to get back to the original page.

In this workflow a User with the Role of Fire Safety Officer creates an Assessment.

1. [Login](#) to the FSS application;
2. [Create an Assessment](#);

# FSO Completes Assessment

---

This workflow describes how an Assessment is completed.



After clicking on any of the links below use the back page button on your browser to get back to the original page.

In this workflow a User with the Role of Fire Safety Officer completes an Assessment.

1. [Login](#) to the FSS application;
2. [Search for an Assessment](#);
3. [Enter data for Assessment](#)
4. [Complete the Assessment](#);

# FSO Team Receives Notification for Assessment Validation

---

This workflow describes how the Fire Safety Officer receives a [Notification](#) for Validating an Assessment.



After clicking on any of the links below use the back page button on your browser to get back to the original page.

In this workflow all Users with the Role of Fire Safety Officer receive a notification when an Assessment is Completed.

# FSO Validates Assessment

---

This workflow describes how an Assessment is validated.



After clicking on any of the links below use the back page button on your browser to get back to the original page.

In this workflow a User with the Role of Fire Safety Officer validates an Assessment.

1. [Login](#) to the FSS application;
2. [Validate an Assessment](#).

# FSS Plans the Next Assessment after Validation

---

This workflow describes how the Fire Safety System creates the next Assessment after an Assessment is validated.

✿ After clicking on any of the links below use the back page button on your browser to get back to the original page.

1. As soon as an Assessment is Validated, FSS creates the next Assessment for the Property.
2. The date of Next Assessment is calculated based on a business rule.

✿ The business rule for setting the next Assessment date is configurable.

# Action Notification is sent to FST Team Leaders

---

This workflow describes how the Fire Safety Officer receives a [Notification](#) about new Actions.

✿ After clicking on any of the links below use the back page button on your browser to get back to the original page.

1. As soon as an Assessment is validated by a Fire Safety Officer, a notification is sent to the Team Leader for all Teams with the Action assigned;
2. The Fire Safety System creates an Action for every Significant Finding / Defect flagged as Non Compliant;
3. The Information entered for the Significant Finding / Defects is used to populate the required information for Actions.

# FST Starts implementing the Actions

---

This workflow describes how a Fire Safety Team updates the Actions.



After clicking on any of the links below use the back page button on your browser to get back to the original page.

In this workflow a User with Role of Fire Safety Team updates an Action.

1. [Login](#) to the FSS application;
2. [Search for an Action](#);
3. [Update Action](#).

# FST Completes Actions

---

This workflow describes how a Fire Safety Team completes the Actions.



After clicking on any of the links below use the back page button on your browser to get back to the original page.

In this workflow a User with the Role of Fire Safety Team completes an Action.

1. [Login](#) to the FSS application;
2. [Search for an Action](#);
3. [Complete Action](#).



# FSO Notifications

---

This workflow describes how FSS notifies Fire Safety Officers.



After clicking on any of the links below use the back page button on your browser to get back to the original page.

A Notification is sent to all Fire Safety Officers for:

- Overdue start Assessment. This notification is repeated every 14 days.
- Overdue completion Assessment. This notification is repeated every 14 days.
- Assessment completed pending validation. This notification is repeated every 14 days.
- Assessment to be started within next 14 days.

# FST Notification

---

This workflow describes how FSS notifies the Fire Safety Team.



After clicking on any of the links below use the back page button on your browser to get back to the original page.

A Notification is sent to all Fire Safety Teams for:

- Overdue start Action. This notification is repeated every 14 days.
- Overdue completion Action. This notification is repeated every 14 days.
- As soon as Assessment is Validated FST Leader receives notifications on all Actions created.

# FSO starts the next Assessment for a Property

---

This workflow describes how an Assessment is completed.

✿ After clicking on any of the links below use the back page button on your browser to get back to the original page.

In this workflow a User with the Role of Fire Safety Officer completes an Assessment.

1. [Login](#) to the FSS application;
2. [Search for an Assessment](#);
3. [Complete Assessment](#)

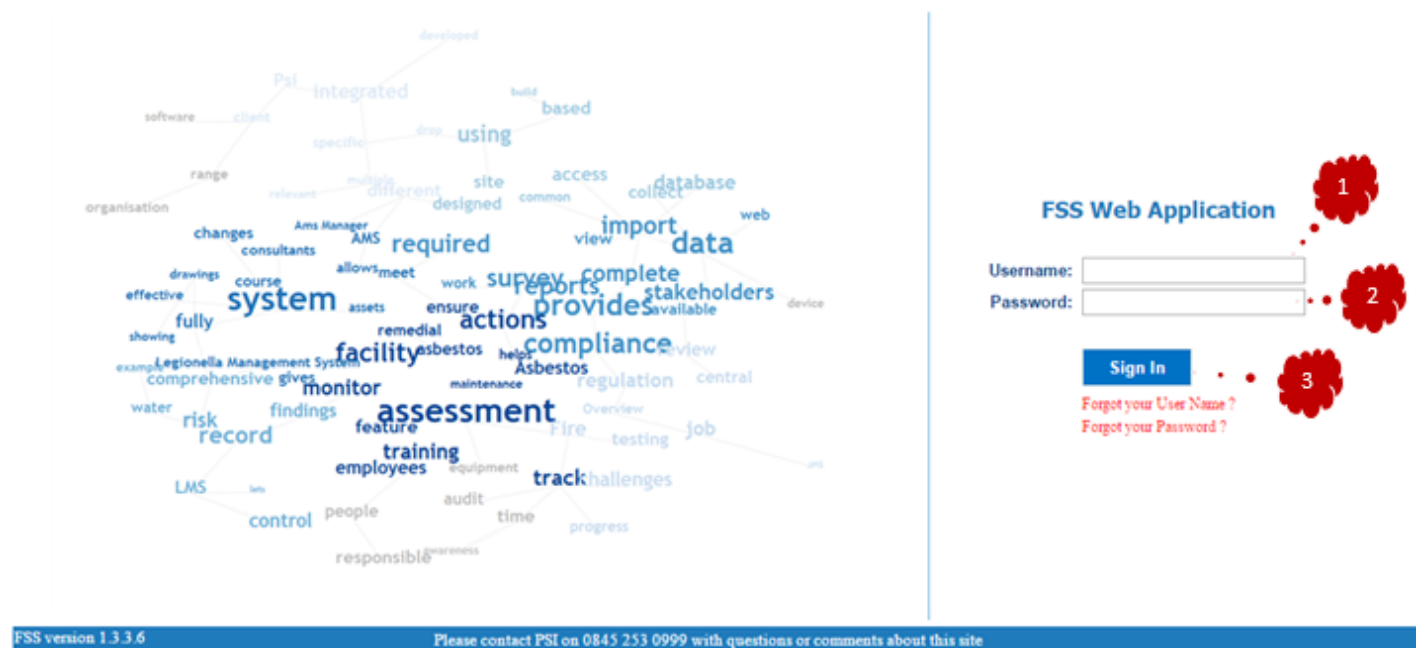
✿ After the first Assessment for a Property, all previous Actions for Assessment Sections are viewable by the FSO during the completion of the new Assessment.

# LOGGING ON

The **Fire Safety System**, for short **FSS**, is an entirely web based application.

- ✿ To access the application for your organisation you need to have a **URL**. You can obtain information about the URL from your **System Administrator**.

The login screen will open as shown below:



1. Enter the **Username**
2. Enter the **Password**
3. Click on **Sign In**

# FORGOT USER NAME

---

If the **Username** is forgotten it can be recovered by the user, following the steps below:

1. Click on '**Forgot your User Name?**'

The **Password Recovery** screen appears:

1. Enter the **email address**. The email address must be the one that is saved in the user profile.
2. Click on **Send**.

An **email** with the Username will be sent to the user.

# FORGOT PASSWORD

---

If the **Password** is forgotten it can be recovered by the user, following the steps below:

1. Click on **Forgot your password?**

The **Password Recovery** screen appears;

1. Enter the **Email**
2. Click **Send**

An email will be sent to the user's email address with a code that needs to be entered.

Once the Code is entered a screen will appear to change the password, when the password is changed, the user can log into the application using the new password.

# HOW TO

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[HOW TO CREATE ASSESSMENT](#)

[HOW TO OPEN ASSESSMENT](#)

[HOW TO ENTER ASSESSMENT DATA](#)

[HOW TO ENTER ASSESSMENT QUESTIONNAIRE](#)

[HOW TO COMPLETE ASSESSMENT](#)

[HOW TO VALIDATE ASSESSMENT](#)

[HOW TO INCOMPLETE ASSESSMENT](#)

[HOW TO CREATE A NEW VERSION FOR ASSESSMENT](#)

[HOW TO DELETE ASSESSMENT](#)

[HOW TO PREVIEW ASSESSMENT](#)

[HOW TO OPEN ACTION](#)

[HOW TO UPDATE ACTION](#)

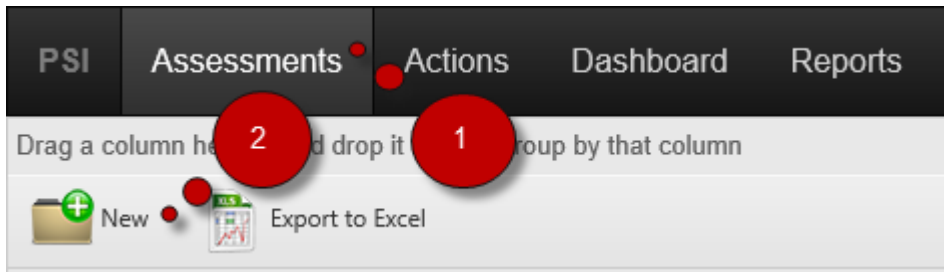
[HOW TO COMPLETE ACTION](#)

[HOW TO SEARCH FOR ASSESSMENT](#)

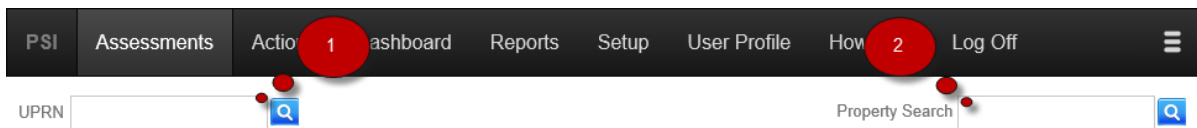
[HOW TO SEARCH FOR ACTION](#)

[HOW TO DELETE ACTION](#)

# HOW TO CREATE ASSESSMENT



1. Select the Assessments from the Main menu.
2. Click on New.



A new form should appear where you should be able to locate your property on which you would like to create an assessment.

If you know the property's UPRN number, then simply enter it in the uprn field and press enter.

1. If you do not know the property's UPRN then click the magnifying glass where you can browse through all of the properties within the system.
2. You can also perform a quick property search by typing in any attribute you remember of the property you would like to assess in this field.



## Assessment Information

UPRN 9988

Property Search

**Property: 9988, Assessment Info**

Date of Creation: 18/01/2017

Date of Assessment:

Management Responsibility:

Assessment Created By: Default User

Name of officer carrying out Assessment:

Date of Original Assessment: 29/11/2011

Date of Last Assessment: 09/01/2020

Date of Next Assessment:

Type of Risk Assessment: Version 1.0

Audit Type:

**Details of Construction and use of Premises**

A detached two storey building with two separate flat doors in entrance lobby. Brick walls with timber floor, pitched timber and slate roof. Approx. 15m x 12m. Property built approx. 1910.

**Legislation that applies**

- ☒ Electrical Regulation
- ☒ Gas Regulation
- ☐ Housing Act
- ☐ Health and safety Act
- ☐ Licensing Act
- ☐ Gaming Act
- ☐ Building Regulation
- ☒ The Regulatory Reform (Fire Safety) Order 2005
- ☒ Fire Safety Order - Sleeping Accommodation
- ☐ Fire Alarm & Fire Detection Systems Guide BS 5839 Part 1 2002
- ☐ British Standard for Emergency Lighting BS 5266 Part 1
- ☐ Fire Safety Order - Offices and Shops
- ☐ Fire Safety Order - Factories and Warehouses
- ☐ Fire Safety Order - Residential Care Premises
- ☐ Fire Safety Order - Educational Premises
- ☐ Fire Safety Order - Small and Medium Places of Assembly
- ☐ Fire Safety Order - Large Places of Assembly
- ☐ Fire Safety Order - Theatres, Cinemas and Similar Premises
- ☐ Fire Safety Order - Open Air Events, Shows and

**Photo**

No Photo Available

Max Photo Size is 2MB

Upload Remove

Save

1. Date of Creation – This field is populated by the system upon creation of the assessment.
2. Date of Assessment – This has to be entered by the user.
3. Management Responsibility – This field is populated by the system, it determines which division is responsible for this property.
4. Assessment Created By – This field contains the name of the user who is creating the assessment.
5. Name of officer carrying out Assessment – This field displays all the fire safety officers within the system.
6. Date of Original Assessment – This field is populated by the system, it shows the date of the first assessment for selected property,
7. Date of Last Assessment – This field is populated by the system, it shows the date of the last assessment for selected property,
8. Date of Next Assessment – This field shows the date assigned to this property for when it will be assessed again.
9. Type of Risk Assessment – This field contains an available library of risk assessments, selection of these, determines the default sections and assessment questions for the assessment.
10. Audit Type – This field you can choose an audit type for assessment.
11. Details of Construction and use of Premises – This is a free text box, you can insert any other necessary details of the assessment there,

12. Legislation that applies – This section you can choose which legislations apply for the property you would like to assess.
13. Photo Upload – This allows you to select a photo for the selected property
14. Upload – Uploads and sets the selected photo for the selected property
15. Remove – Removes a property photo
16. After you have inserted all the necessary information, press the save button to create the assessment.

Your assessment should now appear in the assessments list.

✿ The Management Responsibility field is configured by the Administrator. This is an attribute of a Property,

✿ The date of next Assessment is derived from the property Attribute. This is configured by Date of Next Assessment Rule . To configure this speak with Administrator.

✿ As soon as Assessment is saved the User is transfered to Assessment List and the new Assessment is highlighted

# HOW TO OPEN ASSESSMENT

The screenshot displays the 'Assessments' section of the PSI2000 web application. The interface includes a top navigation bar with links: PSI, Assessments, Actions, Dashboard, Reports, Setup, User Profile, How To..., and Log Off. Below the navigation bar is a header area with a 'New' button, an 'Export to Excel' button, and a 'Clear Filter' button. The main area contains a table with columns: STATUS, PROPERTY ID, ASSESSMENT REF NO, NUMBER, ADDRESS, and AREA. A dropdown menu is open for the first row, showing 'Open' and 'Delete' options. Red circles with numbers 1 through 4 indicate the steps to open an assessment: 1. Click on 'Assessments' in the top navigation bar. 2. Click on the 'ASSESSMENT REF NO' column header. 3. Click on the dropdown arrow for the first row. 4. Click on the 'Open' option in the dropdown menu.

STATUS	PROPERTY ID	ASSESSMENT REF NO	NUMBER	ADDRESS	AREA
Planned		2016-11-16-3882-23131			

Page size: 10  
1 items in 1 pages

1. Click on Assessment;
2. [Search for an Assessment](#)
3. Click on Dropdown
4. Click on Open.

# HOW TO ENTER ASSESSMENT DATA

On this page, you will learn how to insert information into your assessment for a property. Below is the list of topics that this article will consist of -

- Property
- Support Document
- Assessment Info
- Occupancy
- Previous Fire Incidents
- Questionnaire
- Risk Assessment
- Fire Equipment
- Actions

## Property

This tab shows the property information this assessment is being made on.

The screenshot shows the 'Property' tab selected in the assessment interface. The top navigation bar includes links for PSI, Assessments, Actions, Dashboard, Reports, Setup, User Profile, How To..., and Log Off. Below this, the 'Selected Property' is displayed with a status of 'Planned at: 11-01-2017 09:22:22'. The 'Property' sub-tab is active, showing fields for 'Property Address' (with a red circle 1), 'UPRN' (71556), and 'Arch. Type' (Community Centres). A 'Photo' section on the left shows a placeholder image of a house with the text 'No Photo Available'. To the right of the photo, there is a 'Max Photo Size is 2MB' label, a 'Select' button (with a red circle 2), and 'Upload' and 'Remove' buttons.

PSI Assessments Actions Dashboard Reports Setup User Profile How To... Log Off

Selected Property: Status: Planned at: 11-01-2017 09:22:22

Property Support Document Assessment Info Occupancy Previous Fire Incidents Questionnaire

Property Address

UPRN 71556 Arch. Type Community Centres

Photo

No Photo Available

Max Photo Size is 2MB

Select Upload Remove

- \* 1. Property Address is configurable. To configure information on Property Address speak with the Administrator.

2. You can insert and update a property photo by clicking here and selecting a photo to upload, After you have selected a photo, please press the upload button to upload the photo to the system.

## Support Document

In this tab, you can insert the support documents you would like. These will be attached onto this assessment

PSI Assessments Actions Dashboard Reports Setup User Profile How To... Log Off

Selected Property: Status: Planned at: 11-01-2017 09:22:22

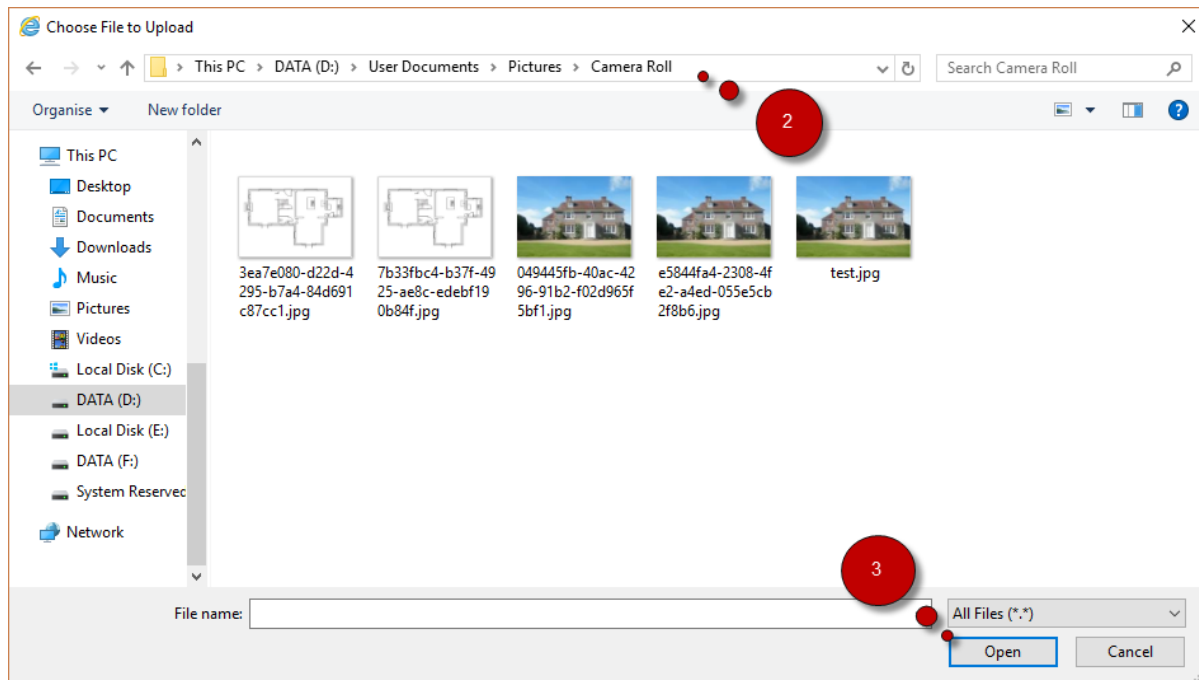
Property Support Document Assessment Info Occupancy Previous Fire Incidents Questionnaire

Select Upload

DOWNLOAD	DELETE	NAME	TYPE	DATE
			Excel	11/01/2017 09:22:22

Page size: 10 1 items in 1 pages

1 Press Select



2 Locate the file you would like to attach, and press open.

3 After so, press upload to upload the file to the system.

## Assessment Info

Assessment Information is displayed that was entered during Creation. Some of this information can be altered in this section.

PSI Assessments Actions Dashboard Reports Setup User Profile How To... Log Off

Selected Property: [redacted] Status: Planned at: 11-01-2017 09:22:22

Property Support Document **Assessment Info** Occupancy Previous Fire Incidents Questionnaire

Save 14

**Assessment Info**

Assessment Ref. No. 2017-1-11-3935-71556 1

Date of Creation 11/01/2017 2

Date of Assessment 09/01/2019 3

Assessment Created By Default User 4

Management Responsibility [redacted] 5

Name of officer carrying out Assessment [redacted] 6

Date of Original Assessment 04/05/2010 7

Date of Last Assessment 09/01/2017 8

Date of Next Assessment 09/03/2020 9

Type of Risk Assessment Version 1.0 10

Audit Type Common areas only, 11

**Details of Construction and use of Premises**

A purpose built single storey community room attached to 2 storey flats on a housing scheme. The building is constructed with concrete floor, brick walls with a timber framed roof with concrete roof tiles. 12

**Legislation that applies** 13

- ☒ Electrical Regulation
- ☐ Gas Regulation
- ☐ Housing Act
- ☐ Health and safety Act
- ☐ Licensing Act
- ☐ Gaming Act
- ☐ Building Regulation
- ☒ The Regulatory Reform (Fire Safety) Order 2005
- ☐ Fire Safety Order - Sleeping Accommodation
- ☒ Fire Alarm & Fire Detection Systems Guide BS 5839 Part 1 2002
- ☒ British Standard for Emergency Lighting BS 5266 Part 1
- ☐ Fire Safety Order - Offices and Shops
- ☐ Fire Safety Order - Factories and Warehouses
- ☐ Fire Safety Order - Residential Care Premises
- ☐ Fire Safety Order - Educational Premises
- ☒ Fire Safety Order - Small and Medium Places of Assembly
- ☐ Fire Safety Order - Large Places of Assembly
- ☐ Fire Safety Order - Theatres, Cinemas and Similar Premises

1. Assessment Ref.No – This number is automatically generated by the system and cannot be changed.
2. Date of Creation – This is the date when the assessment for this property was created, this cannot be changed.
3. Date of Assessment – This is the date of the actual assessment, this can be altered by pressing on the calendar sign and selecting a new date,
4. Assessment Created By – This field shows who created the assessment, it cannot be changed.
5. Management Responsibility – This field cannot be changed.
6. Name of officer carrying out Assessment – This displays who will be carrying the assessment, this field can be altered.
7. Date of Original Assessment – This field cannot be changed.
8. Date of Last Assessment – This field cannot be changed.
9. Date of Next Assessment – This field can be changed by selecting the calendar icon and choosing a new date for the assessment.
10. Type of Risk Assessment – This cannot be changed.
11. Audit Type – This can be changed.
12. Details of Construction and use of Premises – This can be changed and more information can be added.

13. Legislation that applies – New options can be selected here and updated, or de-selected.
14. Save button – After you have made your changes, press the save button to update the assessment with the latest information.

✿ Property Address is configurable. To configure information on Property Address speak with Administrator.

✿ Button “Save” and “Save and Close” might not be visible if Auto Save feature is turned on in User Profile.

## Occupancy

The screenshot shows the 'Occupancy' tab of the PSI2000 assessment form. The form is divided into several sections. At the top, there is a navigation bar with links: PSI, Assessments, Actions, Dashboard, Reports, Setup, User Profile, How To..., and Log Off. Below this, a 'Selected Property' section shows the status 'Planned at: 11-01-2017 09:22:22'. The main form area has tabs: Property, Support Document, Assessment Info, Occupancy (selected), Previous Fire Incidents, and Questionnaire. The 'Occupancy' tab contains a 'Save' button (callout 7) and a list of property details (callouts 1-5) and a table of occupancy data (callout 6).

TIME SLOT	OCCUPANTS
00:00-04:00	0
04:00-08:00	0
08:00-12:00	30
12:00-16:00	30
16:00-20:00	10
20:00-24:00	0

1. Displays the number of flats for the selected property. This cannot be changed.
2. Displays the number of floors within the selected property. This cannot be changed.
3. Displays the number of staff for the selected property. This can be altered by simply entering a new value in.
4. Displays the number of visitors for the selected property. This can be altered by simply inputting a new value in.
5. Displays the number of basement levels for the selected property. This can be altered by simply inputting a new value in.
6. Displays the number of people using the property at different times during the day. This can be altered by simply entering values in each time slots.



- After you have inputted all the information, do not forget to press save to update or save the information on this tab.

✿ Number of flats and number of floor are attribute of the Property. To configure this speak with the Administrator.

## Previous Fire Incidents

PSI Assessments Actions Dashboard Reports Setup User Profile How To... Log Off

Selected Property: Status: Planned at: 11-01-2017 09:22:22

Property Support Document Assessment Info Occupancy **Previous Fire Incidents** Questionnaire

+ Add new record Refresh

DELETE	DATE	CAUSE	INCIDENT NO	TYPE	TIME OF CALL

Date: Cause: Incident No: Type: Time of Call:

Insert Cancel

No records found.

Page size: 10 0 items in 1 pages

- To insert a new record, press the add a new record label
- Insert the date of the incident
- Insert the cause of the incident
- Insert the incident Number
- Insert the type of incident.
- Insert the time of call of the incident.
- After you are done with entering the data, press the insert button

Your fire incident should be populated in the system.

## Questionnaire

View the following topic to know how to enter the Questionnaire: [Enter Questionnaire](#)

## Risk Assessment

PSI Assessments Actions Dashboard Reports Setup User Profile How To... Log Off

Selected Property: [Redacted] Status: Planned at: 11-01-2017 09:22:22

Property Support Document Assessment Info Occupancy Previous Fire Incidents Questionnaire

Save 4

**Likelihood?**  
Taking into account the fire prevention measures observed at the time of this risk assessment it is considered that the hazard from fire (likelihood of fire) at these premises is - Select One  
☐ Low ☒ Medium ☐ High 1

**Consequence?**  
Taking into account the nature of the premises and the occupants as well as the fire protection any procedural arrangements observed at the time of this fire risk assessment it is considered that the consequences for life safety in the event of a fire would be - Select One  
☐ Slight Harm ☒ Moderate Harm ☐ Extreme Harm 2

**Overall Risk Rating?**  
Accordingly, it is considered that the risk to life from at these premises is - Select One  
☐ Trivial ☒ Tolerable ☐ Moderate ☐ Substantial ☐ Intolerable 3

1. Select the Likelihood for the risk
2. Select Consequence
3. Select Overall Risk Rating for the Assessment
4. Click 'Save'

## Fire Equipment

PSI Assessments Actions Dashboard Reports Setup User Profile How To... Log Off

Selected Property: [Redacted] Status: Planned at: 11-01-2017 09:22:22

Property Support Document Assessment Info Occupancy Previous Fire Incidents Questionnaire

+ Add new record 1 Refresh

	DELETE	EQUIPMENT NAME	FLOOR	LOCATION	INSPECTION DATE	INSPECTED	WEEKLY	MONTHLY	QUARTER
<a href="#">Edit</a>	×	Fire Fighting Equipment	Site	Site	06/06/2016	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">Edit</a>	×	Fire Alarm	Site	Site	11/10/2016	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	×	Emergency Lighting	Site	Site	06/12/2016	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<a href="#">Edit</a>	×	Electrical Mains	Site	Site	11/10/2006	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Page size: 10 6 items in 1 pages

1. To add new fire equipment press the add new record label.

Equipment Name: Fire Alarm

Floor:

Location:

Inspection Date:

Inspected:

Weekly:

Monthly:

Quarterly:

Six Monthly:

Annually:

Five Yearly:

Passed:

Insert Cancel

After inserting all the information about the equipment, press the insert button and the item will be stored in the database

PSI	Assessments	Actions	Dashboard	Reports	Setup	User Profile	How To...	Log Off	
Selected Property:		Status: Planned at: 11-01-2017 09:22:22							
Property	Support Document	Assessment Info	Occupancy	Previous Fire Incidents	Questionnaire				
+ Add new record									Refresh
DELETE	EQUIPMENT NAME	FLOOR	LOCATION	INSPECTION DATE	INSPECTED	WEEKLY	MONTHLY	QUARTER	
<a href="#">Edit</a>	Fire Fighting Equipment	Site	Site	06/06/2016	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<a href="#">Edit</a>	Fire Alarm	Site	Site	11/10/2016	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
<a href="#">Edit</a>	Emergency Lighting	Site	Site	06/12/2016	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<a href="#">Edit</a>	Electrical Mains	Site	Site	11/10/2006	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

2. You can delete your fire equipment item by clicking the red x button next to it.
3. You can edit your fire equipment item by clicking the edit button.

# Actions

PSI Assessments Actions Dashboard Reports Setup User Profile How To... Log Off

Selected Property: [Redacted] Status: Planned at: 11-01-2017 09:22:22

Property Support Document Assessment Info Occupancy Previous Fire Incidents Questionnaire

PROPERTY	LOCATION	FINDING	RECOMMENDATION	TYPE	PRIORITY	SFD STATUS	DESCRIPTION	TEAM
Site	Site	Storage items fo	recommendation	SF	B	Not Started		Housing Team

Open

**Finding :**  
Storage items found in electrical cupboard

**Recommendation :**  
recommendation for items to be stored in alternative location away from electrics

Compliant Status: Non Compliant

Type: SF

Priority: B

Team: Housing Team

Floor: Site

Location: Site

Cost: (£)

Add Comment

USER NAME	COMMENT	DATE
No records to display.		

Site Main entrance Storage cupboard Storage cupboard to be SF B Not Started Housing Team

Page size: 10 16 items in 2 pages

1. Press the triangular icon to expand the Action
2. Press Open to open the Action
3. You can add a comment onto the action by inserting text here and pressing the insert button

# HOW TO ENTER ASSESSMENT QUESTIONNAIRE

## To Open a Section to Complete it

The screenshot shows the PSI2000 Fire Safety System interface. The top navigation bar includes links for PSI, Assessments, Actions, Dashboard, Reports, Setup, User Profile, How To..., Log Off, and Default User. Below this, the 'Selected Property' is displayed, along with the status 'Planned at: 16-11-2016 11:04:44'. The main content area is divided into tabs: Property, Support Document, Assessment Info, Occupancy, Previous Fire Incidents, Questionnaire, and Risk Assessment. The 'Questionnaire' tab is selected. Below the tabs, there is a table with columns: ACTION, NAME, ANSWERED, TOTAL SFD OUTSTANDING, HOUSING TEAM, BUILDING AND MAINTENANCE TEAM, MECHANICAL AND ELECTRICAL TEAM, PLANNED WORKS TEAM, HEATING SYSTEM, NOT SPECIFIED, and COMPLIANCE. The table lists six sections: Part 1 Are there any occupants especially at risk?, Part 2 History of Fires Anti-social Behaviour, Part 3 Electrical, Part 4 Smoking, Part 5 Portable heaters and heating installations, and Part 6 Cooking. Each section has an 'Open' button and an 'Answered' checkbox. Red circles 1, 2, and 3 highlight the 'Questionnaire' tab, the 'Open' button, and the 'Answered' checkbox respectively.

ACTION	NAME	ANSWERED	TOTAL SFD OUTSTANDING	HOUSING TEAM	BUILDING AND MAINTENANCE TEAM	MECHANICAL AND ELECTRICAL TEAM	PLANNED WORKS TEAM	HEATING SYSTEM	NOT SPECIFIED	COMPLIANCE
Open	Part 1 Are there any occupants especially at risk?	<input type="checkbox"/>	0	0	0	0	0	0	0	Not Applicable
Open	Part 2 History of Fires Anti-social Behaviour	<input type="checkbox"/>	0	0	0	0	0	0	0	Not Applicable
Open	Part 3 Electrical	<input type="checkbox"/>	0	0	0	0	0	0	0	Not Applicable
Open	Part 4 Smoking	<input type="checkbox"/>	0	0	0	0	0	0	0	Not Applicable
Open	Part 5 Portable heaters and heating installations	<input type="checkbox"/>	0	0	0	0	0	0	0	Not Applicable
Open	Part 6 Cooking	<input type="checkbox"/>	0	0	0	0	0	0	0	Not Applicable

At the bottom of the interface, there is a pagination bar showing 'Page size: 10' and '20 items in 2 pages'.

1. Select 'Questionnaire'
2. Click Open to Open a Section
3. Click Answered Box to mark all the Significant Findings and Defects in the section as Answered. If answered you can click again to clear all the answers

## Open section will show the Normal Questions

PSI Assessments Actions Dashboard Reports Setup User Profile How To... Log Off Default User ▾

Selected Property: Status: Planned at: 16-11-2016 11:04:44

Normal Questions SFD Questions Close

**Part 1 Are there any occupants especially at risk?**

Save

Number of people sleeping

Number of disabled people

Has PEEPs been done?

Number of Lone workers

Number of Young Persons Employed

Others (specify)

Number of Others

Comment

1. Assessment Section name
2. Normal Question "Question"
3. Normal Question Text Type Input
4. Normal Question Select Type Input
5. Normal Question Multiline Text Input
6. Normal Question 'Save' Button
7. Close Section Button

## Significant Findings within a Section

PSI Assessments Actions Dashboard Reports Setup User Profile How To... Log Off Default User

Selected Property: Status: Planned at: 16-11-2016 11:04:44

Normal Questions SFD Questions Close

**Part 1 Are there any occupants especially at risk?**

Add New Record Copy Complete Action Disregard Action

	COMPLIANCE	FINDING	RECOMMENDATION	ANSWERED	LOCATION	TYPE
Edit	C <input type="radio"/> NC <input type="radio"/> NA <input checked="" type="radio"/>	At the date and time of audit it was noted that...	The persons noted below should be r...	<input type="checkbox"/>		
Edit	C <input type="radio"/> NC <input type="radio"/> NA <input checked="" type="radio"/>	There is a person's Risk ass...	Carry out risk assessment for you...	<input type="checkbox"/>		
Edit	C <input type="radio"/> NC <input type="radio"/> NA <input checked="" type="radio"/>	At the time of audit it was noted t...	Carry out risk assessment data...	<input type="checkbox"/>		
Edit	C <input type="radio"/> NC <input type="radio"/> NA <input checked="" type="radio"/>	At the time of audit it was noted t...	Ensure all oxygen users are recorde...	<input type="checkbox"/>		
Edit	C <input type="radio"/> NC <input type="radio"/> NA <input checked="" type="radio"/>	At the time of audit it was noted t...	Line manager should ensure that sta...	<input type="checkbox"/>		

Page size: 10 5 items in 1 pages

1. Assessment Section Name
2. Select to View the SFD Questions
3. Click to Add new SFD
4. Select a SFD and Click to Copy its Details
5. Select to Complete a Non Compliant Action (Only available for SFD that have been marked as Non Compliant and Validated in a Previous Assessment)
6. Select to Disregard a Non Compliant Action (Only available for SFD that have been marked as Non Compliant and Validated in a Previous Assessment)
7. Click to Edit a SFD
8. To edit a SFD, for Compliance use the "C" option, for Non Compliant use "NC" and for Not Applicable use "NA". Edit will be opened if "NC" option is selected to fill in all the details.
9. Description of the Findings. Click the question mark to view the full text.
10. Description of the Recommendation. Click the question mark to view the full text.
11. Status for the Assessment Section Question. A tick means that the Question is completed. By default all Findings are set to "NA". If this is the appropriate selection for a specific Findings, click on the status icon to change it to completed
12. Click to Close the SFD List

## To Enter details of a Significant Finding and Defect

**Part 1 Are there any occupants especially at risk?**

At the date and time of audit it was noted that disabled persons are located in inappropriate areas.

The persons noted below should be re-sited to remove dangerous conditions noted on fire safety Audit

See Notes In Part 1

Floor:  Compliant Status:  Descriptive Text:

Location:  Type:

Trend Amount:  Priority:

Trend:  Team:

Upload Remove

5 items in 1 pages

1. Click to Edit an SFD Item;
2. The Finding describes the nature of what is identified;
3. The Recommendation describes how the Findings should be dealt with;
4. Click to select a photo file for the Finding;
5. Click Save to save the selected photo;
6. Click to Remove the attached photo from SFD;
7. Floor describes the floor of the Finding;
8. Location describes the Location of the Finding;
9. Trend Amount is used to indicate how many Trend Items are being recorded;
10. Trend is used for categorisation of the Finding;
11. The Compliance Status represents the Status in terms of compliance. This is linked to the options on the Assessment Section list;
12. The Type represents the category for the Finding;
13. Priority describes the urgency for dealing with the Finding. For definition of options see [Action Priority](#);



14. The Team represents the team responsible for dealing with the Finding;
15. Click on the drop down to see the list of pre defined Descriptive Texts for the selected Finding;
16. Enter/edit a Descriptive Text to describe the Finding and Recommendation;
17. Click Save to save the Significant Finding or Defect;

# HOW TO COMPLETE ASSESSMENT

The screenshot shows the 'Assessments' section of the PSI2000 application. At the top is a navigation bar with links: PSI, Assessments, Actions, Dashboard, Reports, Setup, User Profile, How To..., and Log Off. Below the navigation bar is a header area with a prompt 'Drag a column header and drop it here to group by that column', a 'New' button, an 'Export to Excel' button, and a 'Clear Filter' button. The main area contains a table with columns: STATUS, PROPERTY ID, ASSESSMENT REF NO, NUMBER, ADDRESS, AREA, and PO. A single row is visible with the status 'In Progress', property ID '46390', and assessment ref no '2017-1-9-3930-46390'. A red circle '1' highlights the dropdown arrow on the left of the row. A second red circle '2' highlights the 'Complete' option in the dropdown menu that appears when the arrow is clicked. The dropdown menu also shows 'Open' and 'Delete' options. At the bottom, there is a pagination bar with 'Page size: 10' and '1 items in 1 pages'.

STATUS	PROPERTY ID	ASSESSMENT REF NO	NUMBER	ADDRESS	AREA	PO
In Progress	46390	2017-1-9-3930-46390				

1. Click on the drop down options for the Assessment
2. Select "Complete"



The status of the Assessment will change to "Completed".

# HOW TO VALIDATE ASSESSMENT

An Assessment can be Validated from Assessment List.



Please make sure to check all the Assessment Information. See [View Assessment Information](#)

## To Validate

The screenshot shows the 'Assessments' section of the PSI2000 application. The top navigation bar includes 'PSI', 'Assessments', 'Actions', 'Dashboard', 'Reports', 'Setup', 'User Profile', 'How To...', and 'Log Off'. Below the navigation bar, there's a header for the assessment list with options to 'New' or 'Export to Excel', and a 'Clear Filter' button. The table has columns: STATUS, PROPERTY ID, ASSESSMENT REF NO, NUMBER, ADDRESS, AREA, and PO. A single row is visible with status 'Completed', property ID '9551', and assessment ref no '2016-10-25-3870-9551'. A dropdown menu is open on the left of this row, showing options: 'Open', 'Incomplete', 'Validate', 'Preview', and 'Delete'. The 'Validate' option is highlighted. Red circles with numbers '1' and '2' indicate the steps: clicking the dropdown arrow and selecting 'Validate'.

STATUS	PROPERTY ID	ASSESSMENT REF NO	NUMBER	ADDRESS	AREA	PO
Completed	9551	2016-10-25-3870-9551				

1. Click on the drop down options for the Assessment.
2. Select Validate.

## Validation Screen will open

The screenshot shows the 'Validate Assessment' window. At the top, there is a navigation bar with links: PSI, Assessments, Actions, Dashboard, Reports, Setup, User Profile, How To..., and Log Off. Below this, the window title is 'Validate Assessment'. The main area contains a table with columns: SECTION NAME, TOTAL SFD OUTSTANDING, HOUSING TEAM, BUILDING AND MAINTENANCE TEAM, MECHANICAL, and ELECTRICAL TE/. The table lists eight parts of an assessment. Red circles with numbers 1 through 4 are overlaid on the interface: 1 is on the 'Valid' button, 2 is on the 'Open' button, 3 is on the 'Housing Team' column header, and 4 is on the 'Cancel' button. At the bottom, there is a pagination bar showing 'Page size: 10' and '20 items in 2 pages'.

SECTION NAME	TOTAL SFD OUTSTANDING	HOUSING TEAM	BUILDING AND MAINTENANCE TEAM	MECHANICAL	ELECTRICAL TE/
Part 1 Are there any occupants especially at risk?	0	0	0	0	
Part 2 History of Fires Anti-social Behaviour	0	0	0	0	
Part 3 Electrical	0	0	0	0	
Part 4 Smoking	0	0	0	0	
Part 5 Portable heaters and heating installations	0	0	0	0	
Part 6 Cooking	0	0	0	0	
Part 7 Lightning	0	0	0	0	
Part 8 Housekeeping	1	1	0	0	

1. Section to Validate for Assessment;
2. Select any Supporting Documents available for an Assessment;
3. Click to Open the Selected Supporting Document
4. Click 'Cancel' to Close The Validation;

## To Inspect the Assessment Results

The screenshot shows the 'Validate Assessment' window. The top navigation bar includes links for PSI, Assessments, Actions, Dashboard, Reports, Setup, User Profile, How To..., Log Off, and Default User. The window title is 'Validate Assessment'. Below the title bar, there are tabs for 'Valid' and 'Invalid', and an 'Open' button. The main content area is divided into two panes. The left pane lists assessment sections with their respective scores. The right pane shows the details of the selected section, including 'Normal Questions' and 'SFD Questions'. Red circles with numbers 1, 2, and 3 indicate the steps to inspect the assessment results: 1. Click a Section to expand the Section Questions; 2. Select to View the Answers for Normal Questions; 3. Select to View the Answers for SFD Questions.

SECTION NAME	TOTAL S
Part 1 Are there any occupants especially at risk?	0
Part 2 History of Fires Anti-social Behaviour	0
Part 3 Electrical	1
Part 4 Smoking	0
Part 5 Portable heaters and heating installations	0
Part 6 Cooking	0
Part 7 Lightning	0

**Normal Questions**

- Have all fixed installation systems been checked in the last 5 years?
- Has all portable electrical equipment been PAT tested?
- Is there a policy to deal with use of personal electrical equipment in the common areas?
- Are there any trailing leads and adaptors in use?
- Is there a policy to control use of leads and adaptors?

**SFD Questions**

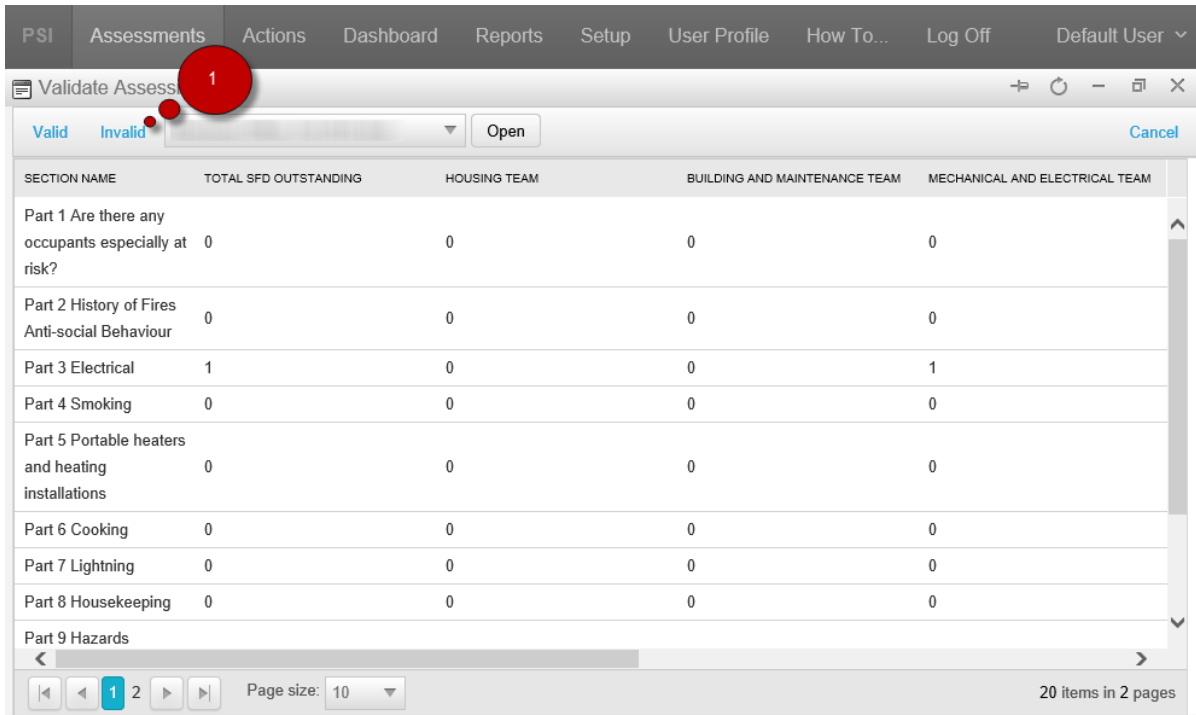
**Comment**

Mains electrics out of test date

Page size: 10  
21 items in 3 pages

1. Click a Section to expand the Section Questions;
2. Select to View the Answers for Normal Questions;
3. Select to View the Answers for SFD Questions;

## To Invalidate the Assessment



PSI Assessments Actions Dashboard Reports Setup User Profile How To... Log Off Default User ▾

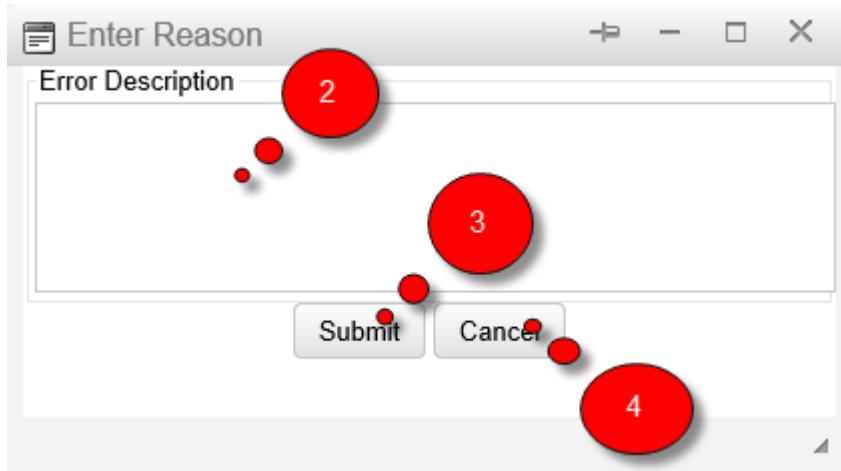
Validate Assessment

Valid Invalid

SECTION NAME	TOTAL SFD OUTSTANDING	HOUSING TEAM	BUILDING AND MAINTENANCE TEAM	MECHANICAL AND ELECTRICAL TEAM
Part 1 Are there any occupants especially at risk?	0	0	0	0
Part 2 History of Fires Anti-social Behaviour	0	0	0	0
Part 3 Electrical	1	0	0	1
Part 4 Smoking	0	0	0	0
Part 5 Portable heaters and heating installations	0	0	0	0
Part 6 Cooking	0	0	0	0
Part 7 Lightning	0	0	0	0
Part 8 Housekeeping	0	0	0	0
Part 9 Hazards				

Page size: 10 20 items in 2 pages

1. Click 'Invalid'



Enter Reason

Error Description

2. Enter reason

3. Click Submit

4. Click Cancel to Cancel the Invalidation



You cannot Validate an Assessment that has been Completed by you.

✿ As soon as the Assessment is Validated. The next Assessment is created with the status of Planned. Calculation of Next Assessment Date is configurable. Please speak with your system Admin. See [Next Assessment Date](#)

✿ After validation an e-mail notification is sent. E-mail Notification is configurable. Please speak with your system Admin. See [Email Notification](#).

# HOW TO INCOMPLETE ASSESSMENT

When Assessment's status is Completed, but user wants to edit information in the assessment, Option Incomplete from drop down options box needs to be selected

The screenshot shows the 'Assessments' section of the PSI2000 application. The top navigation bar includes links for PSI, Assessments, Actions, Dashboard, Reports, Setup, User Profile, How To..., and Log Off. Below the navigation bar, there are buttons for 'New' and 'Export to Excel', and a 'Clear Filter' button. The main table displays a list of assessments with columns for STATUS, PROPERTY ID, ASSESSMENT REF NO, NUMBER, ADDRESS, and AREA. The first row shows an assessment with status 'Completed', property ID '9551', and reference number '2016-10-25-3870-9551'. A dropdown menu is open for the first row, showing options: Open, Incomplete, Validate, Preview, Delete, and two '--Select Option--' entries. Red circles highlight the search filter (1), the action dropdown (2), and the 'Incomplete' option (3). The bottom of the screen shows a pagination bar with 'Page size: 10' and '6 items in 1 pages'.

STATUS	PROPERTY ID	ASSESSMENT REF NO	NUMBER	ADDRESS	AREA
Completed	9551	2016-10-25-3870-9551			
Completed	59822	2016-8-8-3798-59822			
Completed	60074	2016-5-3-2820-60074			
Completed	60500	2016-5-3-2812-60500			
Completed	88535	2016-5-3-2596-88535			
Completed	87998	2016-5-3-2591-87998			

1. [Search for Completed Assessment](#)
2. Select Action Dropdown
3. Select Incomplete

Status of Assessment will change back to In Progress and will allow Editing



# HOW TO CREATE A NEW VERSION FOR ASSESSMENT

To create a new version for an Assessment, this is available only from the latest validated assessment for a property. All information from a previous version validated assessment will be copied to new version assessment. This function is used if, by accident, any of the information in the Validated Assessment was incorrect and needs to be changed.

Creating a new version of an Assessment is possible in two ways: selecting New Version from the drop down box in the [Assessment List](#) or clicking New Version on the [Assessment Info page](#)

## 1 [Search for a Validated Assessment](#)

## Option drop down in the Assessment List

The screenshot shows the 'Assessments' section of the PSI2000 application. At the top, there is a navigation bar with links: PSI, Assessments, Actions, Dashboard, Reports, Setup, User Profile, How To..., and Log Off. Below this is a header area with 'New' and 'Export to Excel' buttons, and a 'Clear Filter' button. The main area is a table with columns: STATUS, PROPERTY ID, ASSESSMENT REF NO, NUMBER, ADDRESS, and AREA. A dropdown menu is open for the first row, showing options: Open, New Version, Preview, and Delete. Red circles with numbers 1, 2, and 3 indicate the steps: 1 points to the 'New Version' option, 2 points to the dropdown arrow, and 3 points to the 'New Version' text. The table contains several rows of validated assessments. At the bottom, there is a pagination bar showing 'Page size: 10' and '2752 items in 276 pages'.

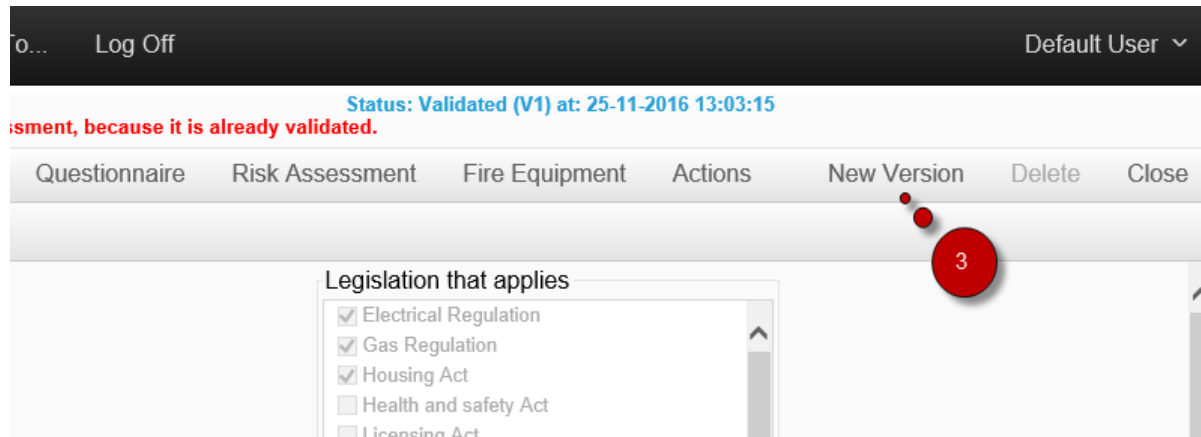
STATUS	PROPERTY ID	ASSESSMENT REF NO	NUMBER	ADDRESS	AREA
Validated	71783	2016-11-25-3894-71783			
Validated	582	2016-11-8-3875-582			
Validated	677	2016-10-10-3847-677			
Validated	22407	2016-09-09-3841-22407			
Validated	22389	2016-09-09-3840-22389			
Validated	59945	2016-8-26-3828-59945			
Validated	347	2016-08-05-3782-347			
Validated	59986	2016-06-29-3750-59986			
Validated	90065	2016-06-28-3749-90065			

2 Click on the Option Drop down

3 Select "New Version"

## Assessment Info page

### 2 [Open Validated Assessment](#)



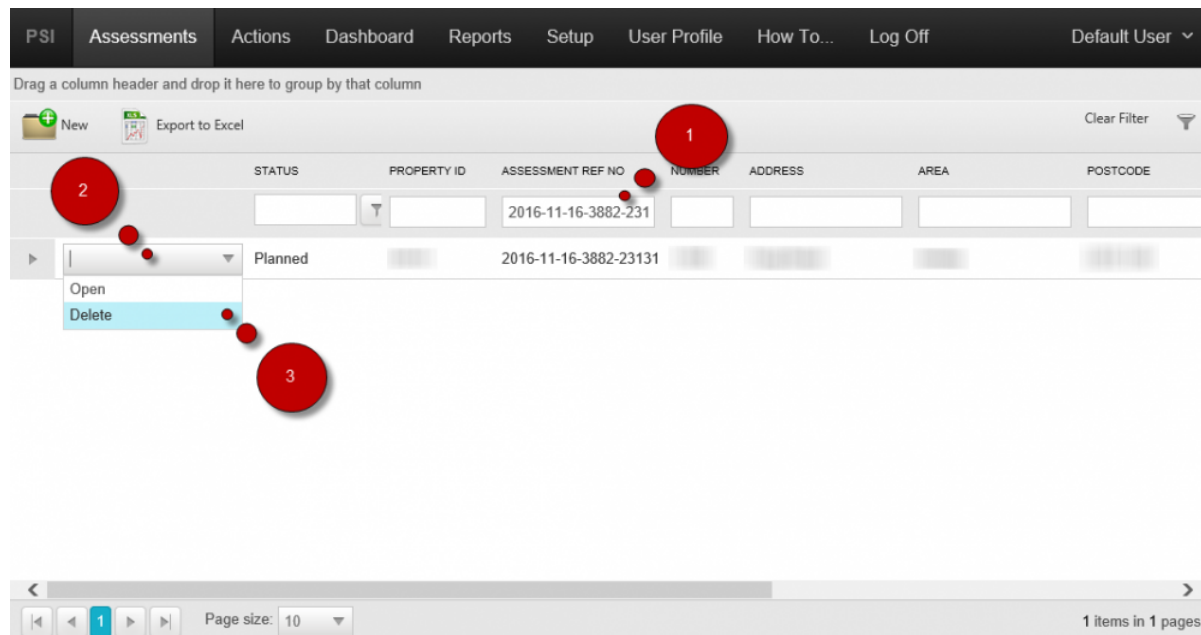
### 3 Click "New Version"

New Assessment is created and added to the Assessment List

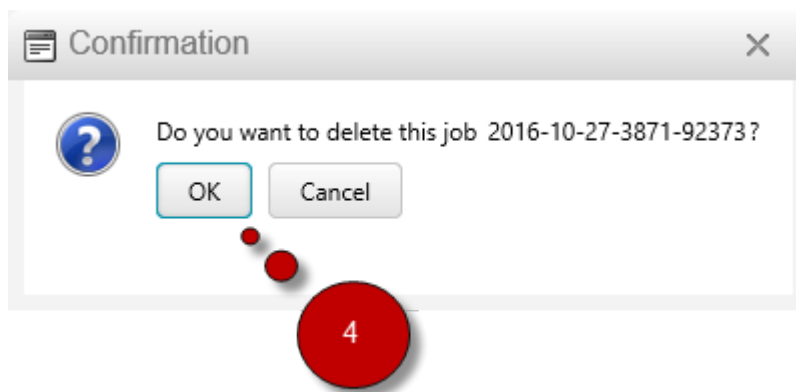


New Version Assessments are created with the status 'In Progress'. In addition, it adds the version of the assessment (e.g. 'In Progress (V1)')

# HOW TO DELETE ASSESSMENT



1. [Search for an Assessment](#)
2. Click on Dropdown
3. Select 'Delete'.



4. Click 'OK'

The assessment and all the relevant information that belongs to the assessment is removed from the system.

# HOW TO PREVIEW ASSESSMENT

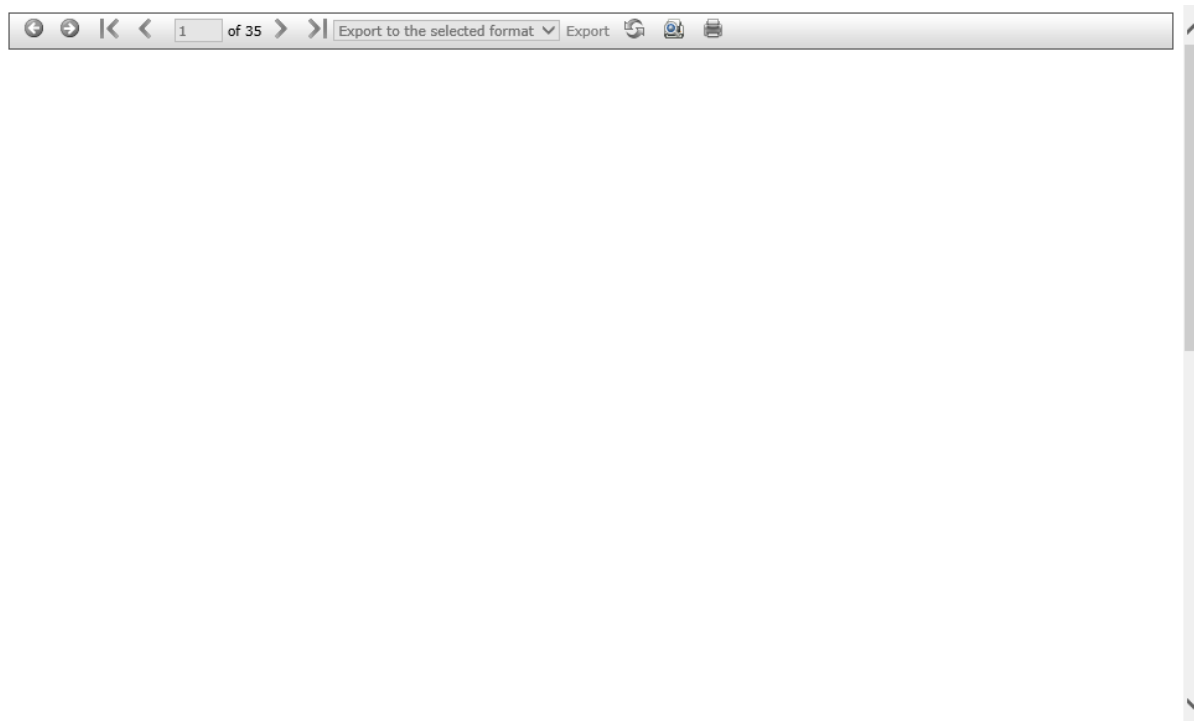
The screenshot displays the PSI2000 Assessments interface. At the top is a navigation bar with links: PSI, Assessments, Actions, Dashboard, Reports, Setup, User Profile, How To..., and Log Off. Below the navigation bar is a header area with a 'New' button, an 'Export to Excel' button, and a 'Clear Filter' button. A table with columns: STATUS, PROPERTY ID, ASSESSMENT REF NO, NUMBER, ADDRESS, and AREA is shown. A red circle '1' points to the 'NUMBER' column header. A red circle '2' points to a dropdown menu icon in the first row of the table. The dropdown menu is open, showing options: Open, New Version, Preview (highlighted), and Delete. A red circle '3' points to the 'Preview' option. At the bottom of the interface is a pagination bar with a 'Page size: 10' dropdown and a '1 items in 1 pages' status.

STATUS	PROPERTY ID	ASSESSMENT REF NO	NUMBER	ADDRESS	AREA
Validated	71783	2016-11-25-3894-71783			

1. [Search for an Assessment](#)
2. Click on Dropdown
3. Click Preview

## Assessment Preview Report will open

\* For the Preview Report template please contact [support@psi2000.com](mailto:support@psi2000.com) to configure the template for your system



# HOW TO OPEN ACTION

The screenshot shows the 'Actions' tab in the PSI2000 interface. The table has columns: OPTION, ACTION REF, STATUS, UPRN, BLOCK, NUMBER, ADDRESS, and AREA. A single row is visible with ACTION REF 37675, STATUS 'In Progress', and UPRN 9988. The 'OPTION' column has a dropdown menu open, showing options: Open, Complete, Disregard, and Delete. Red circles with numbers 1 through 4 indicate the steps: 1. Click the 'Actions' tab, 2. Click the search icon in the top right, 3. Click the dropdown arrow in the 'OPTION' column, and 4. Click the 'Open' option in the dropdown menu.

PSI Assessments **Actions** Dashboard Reports Setup User Profile How To... Log Off

Drag a column header and drop it here to group by that column

Export to Excel Clear Filter

OPTION	ACTION REF	STATUS	UPRN	BLOCK	NUMBER	ADDRESS	AREA
▶	37675	In Progress	9988				

Open  
Complete  
Disregard  
Delete

< >

Page size: 10 1 items in 1 pages

1. Select Action
2. [Search for an Action](#)
3. Click Dropdown
4. Select Open

# HOW TO UPDATE ACTION

## 1 [Open Action](#)

PSI2000 Ltd

Assessments Actions Dashboard Reports Setup User Profile How To... Log Off

Save Save and Close Delete Complete Close

Selected Property: 9988 234 F1-2 Lidgett Lane Gledhow LS17 6QN

Current Action Status: In Progress

**Significant Finding/Defect**

Both flats

**Recommendation**

Ensure both flats are fitted with a domestic type smoke detector with at least one per floor

No Photo Available

2 Completing action

3 Deleting action

4 Saving and closing the action

By scrolling down, we see 3 tabs which hold more information about the action :

- **Assessment**
- **Action Details**
- **Comments**

## Assessment

Assessment	Action Details	Comments
<b>Assessment Information</b>		
Assessment Ref. No.	2016-5-3-3373-9988	
Date of Assessment	09/01/2017	
Date of Creation	03/05/2016	
Assessment Created By	Default User	
Management Responsibility		
Name of officer carrying out Assessment		
Date of Original Assessment	29/11/2011	
Date of Last Assessment	29/11/2014	
Date of Next Assessment	09/01/2020	
Type of Risk Assessment	Version 2.0	
Audit Type	Common areas only, i	
<b>Details of Construction and use of Premises</b> A detached two storey building with two separate flat doors in entrance lobby. Brick walls with timber floor, pitched timber and slate roof. Approx. 15m x 12m. Property built approx. 1910.		
<b>Legislation that applies</b> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Electrical Regulation</li> <li><input checked="" type="checkbox"/> Gas Regulation</li> <li><input type="checkbox"/> Housing Act</li> <li><input type="checkbox"/> Health and safety Act</li> <li><input type="checkbox"/> Licensing Act</li> <li><input type="checkbox"/> Gaming Act</li> <li><input type="checkbox"/> Building Regulation</li> <li><input checked="" type="checkbox"/> The Regulatory Reform (Fire Safety) Order 2005</li> <li><input type="checkbox"/> Fire Safety Order - Sleeping Accommodation</li> <li><input type="checkbox"/> Fire Alarm &amp; Fire Detection Systems Guide BS 5839 Part 1 2002</li> <li><input type="checkbox"/> British Standard for Emergency Lighting BS 5266 Part 1</li> <li><input type="checkbox"/> Fire Safety Order - Offices and Shops</li> <li><input type="checkbox"/> Fire Safety Order - Factories and Warehouses</li> <li><input type="checkbox"/> Fire Safety Order - Residential Care Premises</li> <li><input type="checkbox"/> Fire Safety Order - Educational Premises</li> <li><input type="checkbox"/> Fire Safety Order - Small and Medium Places of Assembly</li> <li><input type="checkbox"/> Fire Safety Order - Large Places of Assembly</li> <li><input type="checkbox"/> Fire Safety Order - Theatres, Cinemas and Similar Premises</li> <li><input type="checkbox"/> Fire Safety Order - Open Air Events, Shows and Events</li> <li><input type="checkbox"/> Fire Safety Order - Healthcare Premises</li> <li><input type="checkbox"/> Fire Safety Order - Transport Premises and Facilities</li> <li><input type="checkbox"/> Supplementary Guide - Means of Escape for Disabled Persons</li> </ul>		

None of the assessment details can be edited

## Action Details

Assessment	Action Details	Comments
Floor	Multiple Flats	
Location Within Premises	Both flats	
Years(s) of SFD	6	
Trend	Electrical Minor Smok	
Trend Amount	2	
Date Passed From FST	15/03/2013	
Original Assessment Date	29/11/2011	
Original Target date (Initial Assessment)	27/05/2012	
Last Assessment Date	09/01/2017	
Original Target date (Latest Assessment)	08/07/2017	
Team	Mechanical and Elect	
Priority Grade	B	
SF/D	D	
Action Start Date	15/03/2013	
Team Responsible Person	Default User	
Estimated Start date	01/04/2012	
Estimated Completion Date	31/03/2015	
Estimated Cost (£)		
Action Completed By		
Action Completion Date		



Make sure the action details tab is selected

1. Floor information is obtained from Assessment and is read only for all roles.
2. Action Start Date can be modified by pressing the calendar icon.
3. Location within Premises information is obtained from Assessment and is read only for all roles
4. Year(s) of SFD information is obtained from the Assessment and is read only. This is derived from two values that are in the Assessment i.e. the year of the Original Assessment Date, and the year of the current Assessment. (For Example, Original Date is 2010 and Current Date is 2014, so this value would be Year(s) of Defect, 2010 to 2014 = 4. This is read only for all roles
5. Trend information is obtained from the Assessment and is ready only. This can only be updated by the Fire Safety Officers who can edit this on their permission level
6. Trend amount. This is only updated by the Fire Safety Officers who can edit this on their permission level
7. Date passed from FST is the date the Action was created. Actions are created as soon as the Assessment is Validated. This is the date the Assessment is Validated and is read only for all roles.
8. Original Assessment Date information is obtained from the Assessment and is ready only. The Original Assessment Date is the Assessment date of the first Assessment for the Property that Significant Finding/Defect was identified.
9. Original target Date (initial Assessment) is the suggested due start date for this action as provided in the first Assessment and is read only. Initial Target Date = Initial Assessment Date + Priority Duration;
10. Last Assessment Date is the date of the last Assessment for the Property and is read only;
11. Original target Date (last Assessment) is the suggested due start date as modified on the last Assessment for the property and is read only. Latest Target Date = Latest Assessment Date + Priority Duration
12. Team information is obtained from the Assessment and is read only. This is only updated by the Fire Safety Officers who can edit this on their permission level;
13. Priority Grade information is obtained from the Assessment and is read only. This is only updated by the Fire Safety Officers who can edit this on their permission level
14. SF/D indicates significant findings and defects.
15. Team Responsible Person which is obtained from the Assessment is read only. This information is obtained from the Team assigned to an Actions. Each Team has a Team Leader that is responsible for all Actions assigned to the Team. This is only updated by the Fire Safety Officers who can edit this on their permission level;
16. Estimated Start Date is the estimated start date for implementation of the Action. This date is used for Notification.
17. Estimated Completion Date is the due completion date for the Action. This date is used for Notification and for creating the Monthly Variation reports;
18. Estimated Cost (£) information is obtained from Assessment and is read only;
19. Action Completed By displays the person who completed the action.

20. Action Completion Date displays the date when the action was completed.

## Comments

Assessment Action Details Comments

Add

	USER NAME	COMMENT	DATE
<a href="#">Edit</a>	Default User	Manual	18/01/2017 11:27:32

Page size: 10 1 items in 1 pages

1. Click on the Comment Tab.
2. Enter the text.
3. Click on Add – A comment should appear in the list.
4. Press the Edit label to edit the comment
5. Press the red cross to delete\* the comment.

✿ Delete function is dependant on permission level.

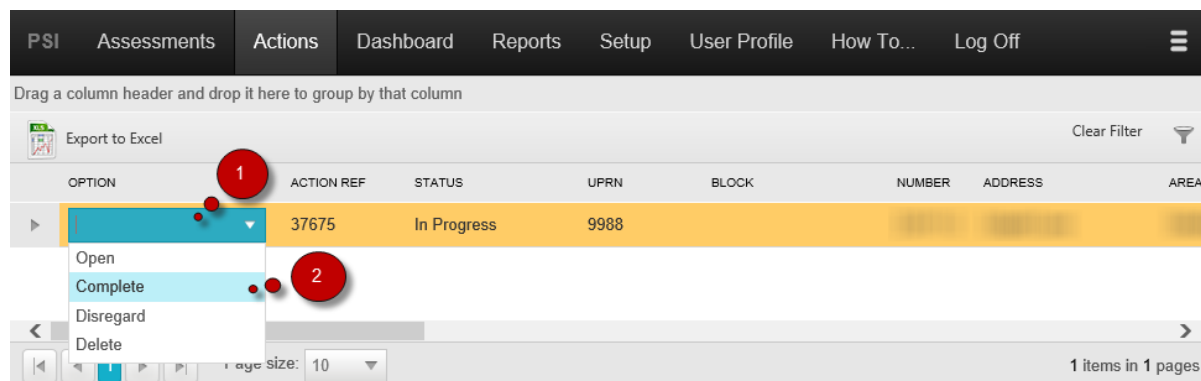
# HOW TO COMPLETE ACTION

\* The Complete Action is only available if the status of the Action is In Progress

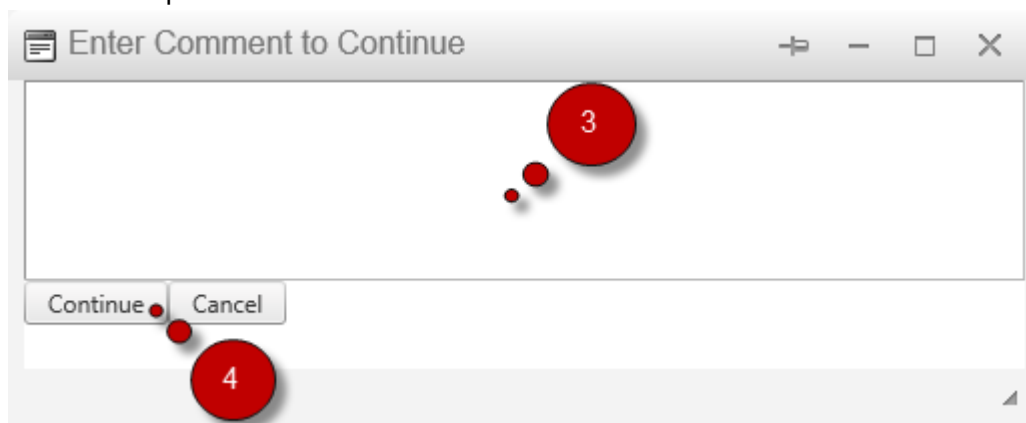
There are two ways of completing an action

- Quick Action Complete
- Completion Inside the Action Form

## Quick Action Complete



1. Click on drop down options for the Action
2. Select 'Complete'



3. Enter a comment for completion
4. Click 'Continue'

## Completion Inside the Action Form

Open the action you would like to complete

The screenshot shows the 'Actions' tab in the PSI2000 interface. The top navigation bar includes 'PSI', 'Assessments', 'Actions', 'Dashboard', 'Reports', 'Setup', 'User Profile', 'How To...', and 'Log Off'. Below the navigation bar, there are buttons: 'Save', 'Save and Close', 'Delete', 'Complete' (highlighted with a red circle and number 1), and 'Close'. The main content area is divided into two sections. The left section, titled 'Selected Property:', contains a text box with 'Both flats' and a 'Recommendation' section with the text 'Ensure both flats are fitted with a domestic type smoke detector with at least one per floor'. The right section, titled 'Current Action Status: In Progress', contains a large box with the text 'No Photo Available' and a house icon.

1. Press the complete button.

The screenshot shows a dialog box titled 'Enter Comment to Continue'. It has a large text area for entering a comment, highlighted with a red circle and number 2. Below the text area are two buttons: 'Continue' (highlighted with a red circle and number 3) and 'Cancel'.

2. Enter a comment for completion
3. Click 'Continue'

✿ When an Action is completed information on the User logged on the system, is entered in Action Completed By.

✿ When an Action is completed the current date is entered in the Action Completion Date.

# HOW TO SEARCH FOR ASSESSMENT

✿ Search is possible on All columns displayed on the Grid.

The screenshot shows the 'Assessments' grid in the PSI2000 application. The grid has columns: STATUS, PROPERTY ID, ASSESSMENT REF NO, NUMBER, ADDRESS, and AREA. A search bar is located above the grid with a filter icon (1) and a 'Clear Filter' button. The grid contains several rows of assessment data. The first row is highlighted in yellow. The grid also has a 'New' button and an 'Export to Excel' button. The footer shows 'Page size: 10' and '3927 items in 393 pages'.

	STATUS	PROPERTY ID	ASSESSMENT REF NO	NUMBER	ADDRESS	AREA
▶ --Select Option-- ▼	Planned	71556	2017-1-11-3935-71556			
▶ --Select Option-- ▼	Planned	9988	2017-1-11-3934-9988			
▶ --Select Option-- ▼	Planned	91708	2017-1-9-3933-91708			
▶ --Select Option-- ▼	Planned	71396	2017-1-9-3932-71396			
▶ --Select Option-- ▼	Planned	46445	2017-1-9-3931-46445			
▶ --Select Option-- ▼	In Progress	46390	2017-1-9-3930-46390			
▶ --Select Option-- ▼	Planned	88078	2017-1-9-3929-88078			
▶ --Select Option-- ▼	Planned	91707	2017-1-9-3928-91707			
▶ --Select Option-- ▼	Planned	90220	2017-1-9-3927-90220			

1. Click on the filter icon
2. Enter a value into the filter fields and press the “Enter” key

For more filter options view [Grid](#)

# HOW TO SEARCH FOR ACTION

✿ Search is possible on All columns displayed on the Grid.

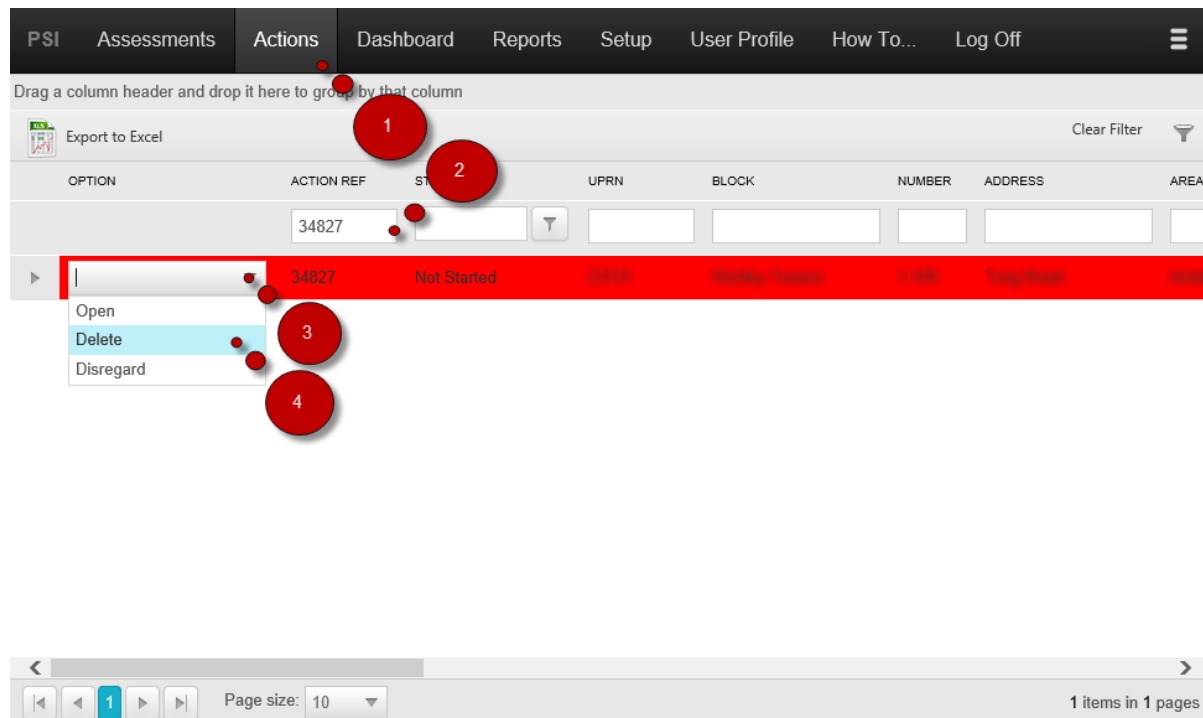
The screenshot displays the 'Actions' section of the PSI2000 interface. At the top, a navigation bar includes links for PSI, Assessments, Actions, Dashboard, Reports, Setup, User Profile, How To..., and Log Off. Below this, a header bar contains a search instruction, an 'Export to Excel' button, and a 'Clear Filter' button. The main area is a table with columns: OPTION, ACTION REF, STATUS, UPRN, BLOCK, NUMBER, ADDRESS, and AREA. The table is filtered to show actions with UPRN 9988. The first nine rows are red, indicating 'Not Started' status, while the last row is yellow, indicating 'In Progress' status. Red callout boxes with numbers 1 and 2 highlight the filter icon and the filter input fields, respectively. The bottom of the grid shows pagination controls, including a page number selector (1-10), a 'Page size' dropdown set to 10, and a total count of '29545 items in 2955 pages'.

OPTION	ACTION REF	STATUS	UPRN	BLOCK	NUMBER	ADDRESS	AREA
--Select Option--	37697	Not Started	9988				
--Select Option--	37692	Not Started	9988				
--Select Option--	37691	Not Started	9988				
--Select Option--	37690	Not Started	9988				
--Select Option--	37688	Not Started	9988				
--Select Option--	37687	Not Started	9988				
--Select Option--	37686	Not Started	9988				
--Select Option--	37678	Not Started	9988				
--Select Option--	37675	In Progress	9988				

1. Click on the filter icon
2. Enter a value into the filter fields and press the “Enter” key

For more filter options view [Grid](#)

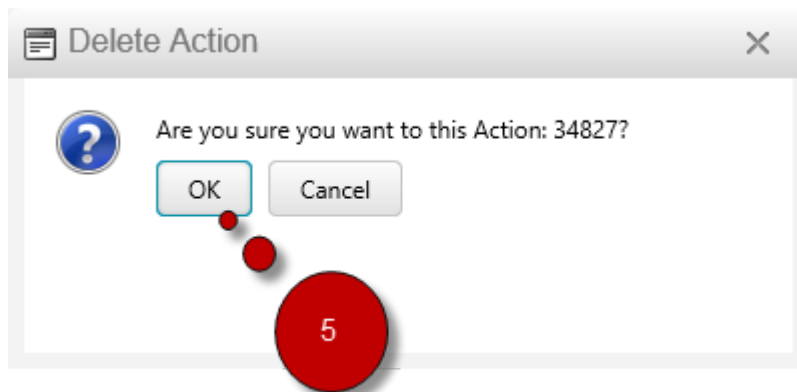
# HOW TO DELETE ACTION



The screenshot shows the 'Actions' tab in the PSI2000 interface. A table lists actions with columns: OPTION, ACTION REF, STATUS, UPRN, BLOCK, NUMBER, ADDRESS, and AREA. The first row is highlighted in red, indicating it is selected. A context menu is open over this row, showing options: Open, Delete (highlighted), and Disregard. Red circles with numbers 1 through 4 indicate the steps: 1. Click on the 'Actions' tab, 2. Click on the 'ACTION REF' column header, 3. Click on the 'Delete' option in the context menu, and 4. Click on the 'Delete' option in the context menu.

OPTION	ACTION REF	STATUS	UPRN	BLOCK	NUMBER	ADDRESS	AREA
	34827	Not Started					

1. Select Action
2. [Search for an Action](#)
3. Click on Dropdown
4. Select Delete



5. Click 'OK'

# DASHBOARD

---

[Property Overview](#)

[Assessment Due](#)

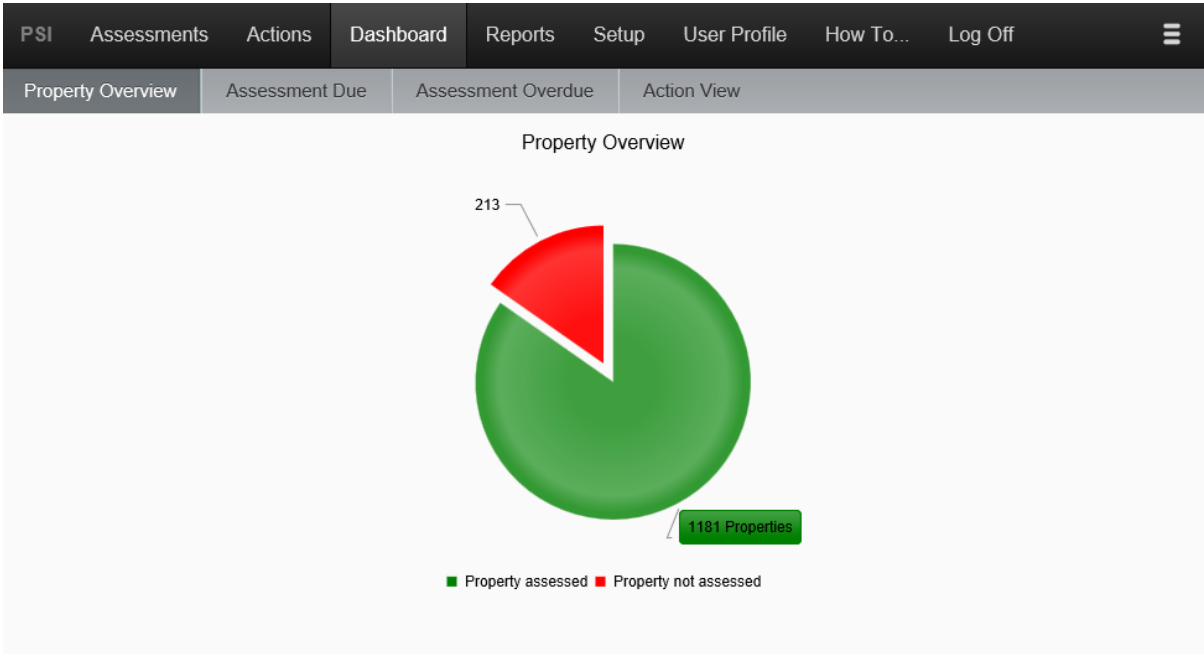
[Assessment Overdue](#)

[Action View](#)



# Property Overview

Property Overview displays a pie chart that shows how many properties are assessed



# Assessment Due

The Assessment Due tab displays a list of assessments for properties that are planned but not started and are due to start.

PSIAssessmentsActionsDashboardReportsSetupUser ProfileHow To...Log Off

Property OverviewAssessment DueAssessment OverdueAction View

PROPERTY ID	ADDRESS	ARCHETYPE	PROPERTY GROUP	DUE DATE	DUE IN DAYS
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
10011		East	Block - Low Rise	No Assessment	
10012		East	Block - Low Rise	No Assessment	
10013		East	Block - Low Rise	No Assessment	
10021		East	Block - Low Rise	No Assessment	
10022		East	Block - Low Rise	No Assessment	

1

2

3

4

5

6

7

8

9

10

...

Page size: 10

1394 items in 140 pages

# Assessment Overdue

The Assessment Overdue tab displays a list of assessments for properties that are planned but not started and are overdue to start.

PSI	Assessments	Actions	Dashboard	Reports	Setup	User Profile	How To...	Log Off	
Property Overview		Assessment Due		Assessment Overdue		Action View			
PROPERTY ID	ADDRESS	ADDRESS	PROPERTY GROUP	DUE DATE	OVER DUE BY DAYS				
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
91718		West	Offices	03/05/2016	-259				
46456		West	Block - High Rise	03/05/2016	-259				
46469		West	Block - High Rise	03/05/2016	-259				
91710		West	Community Centres	03/05/2016	-259				

1

2

3

4

5

6

7

8

9

10

...

Page size: 10

1167 items in 117 pages

# Action View

The Action View displays all the latest Action Information with all the details.

PSI Assessments Actions Dashboard Reports Setup User Profile How To... Log Off							
Property Overview		Assessment Due		Assessment Overdue		Action View	
UPRN	ORIGINAL FRA DATE	LATEST FRA DATE	ORIGINAL TARGET DATE	LATEST TARGET DATE	YEAR(S) OF SFD	FINDINGS	SF
88798	09/05/2016					At the date and time of audit it was noted that the fire alarm was inappropriate for the type of occupancy.	TI fo al w. st cc
71423	05/09/2016		05/12/2016	05/12/2016		The Level of Fire protection for the type of occupancy is inadequate	TI le Fi re cc m
						The Level of Fire protection for the type of occupancy is inadequate	TI le H
<div><div>&lt; 1 2 3 4 5 6 7 8 9 10 ... &gt;</div><div>Page size: 3</div><div>29322 items in 9774 pages</div></div>							

# REPORTS

---

Report are generated using Excel templates by querying data from the database. To configure the templates, please contact the Administrator.

# SETUP

---

**The following settings are accessible by Admin users:**

- [USERS](#)
- [TEAMS](#)
- [CONFIGURATION](#)
- [PROPERTIES](#)
- [QUESTIONNAIRE TEMPLATES](#)
- [DESCRIPTIVE TEXTS](#)

**The following settings are only managed by PSI**

- [COMPLIANCE RULES](#)
- [E-MAIL NOTIFICATION](#)
- [GROUPS](#)
- [NEXT ASSESSMENT DATE](#)

# USERS

How to alter users in the System.

This page consists of the following guides :

How to ...

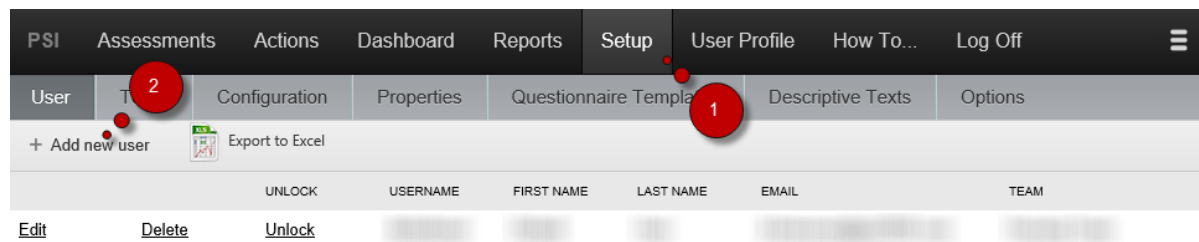
**-Create a new user**

**-Update a user**

**-Delete a user**

**-Unlock a user**

## How to create a new user –



1. Click on Setup from the main menu;
2. Click “Add new user” to create a new user;

You will be presented with a new form where you will be asked to insert the information about the user you would like to insert in the system.

## User Information

The screenshot shows a 'Add New User' window with the following fields and controls, each numbered for reference:

- 1. User Id input field
- 2. First Name input field
- 3. Last Name input field
- 4. Address input field
- 5. Email input field
- 6. Password input field (checked 'New Password?')
- 7. Confirm Password input field
- 8. Mobile input field
- 9. Phone input field
- 10. Team dropdown menu (currently 'Housing Team')
- 11. Role dropdown menu (currently 'Fire Safety Officer')
- 12. Groups dropdown menu
- 13. Active checkbox

Buttons at the bottom: Cancel, Save.

1. User id used for accessing FSS;
2. First Name of the user;
3. Last Name of the user;
4. Address for the user;
5. E-mail of the user. The e-mail is used for notification;
6. Password used for accessing FSS;
7. When changing the password, the password is entered here to ensure the correct password is saved;
8. Mobile number for the user;
9. Main phone number for the user;
10. Team that user belongs to. Actions are assigned to Teams during the Assessment;
11. Role determines what part of the system the user can access. Possible Roles are [FSO](#) ( Fire Safety Officer), [FST](#) (Fire Safety Team) and [Admin](#) ;
12. Group determines which properties the user has access to. Information for Group is derived from [Property Attributes](#) imported into the system.
13. Active controls the user access to the system, if unchecked the user will not be able to log in into the system.

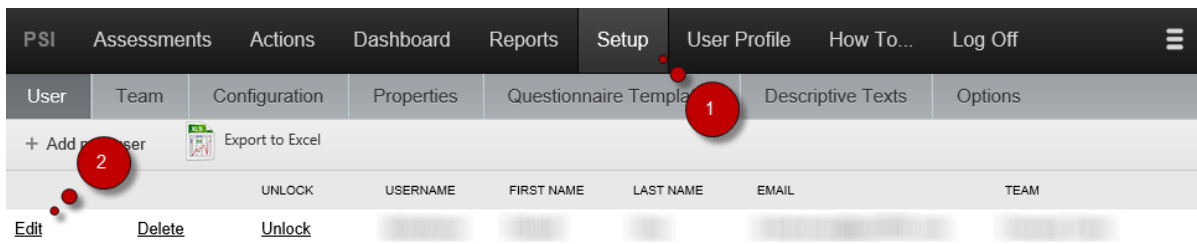


To obtain information on the Property Attribute used for the Group, speak with Administrator.



After you have entered the data, press the save button and the user will be created and added to the system.

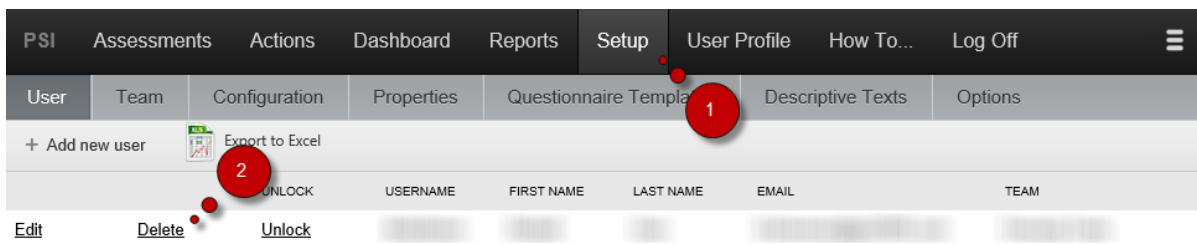
### How to update a user –



1. Click "Setup"
2. Click on the "Edit" label

A form will appear where you should have editable fields which you should be able to edit. After updating the information of the user, press the save button.

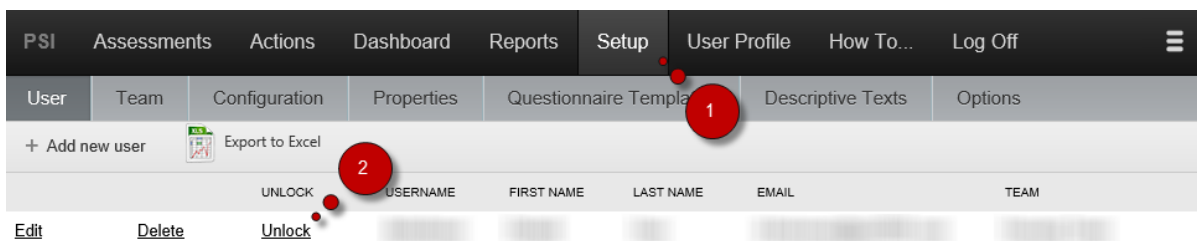
### How to delete a user –



1. Click "Setup"
2. Click the "Delete" label

A form will appear with the users information. There will be a delete button which you would press if you want to delete the user from the system.

### How to unlock a user –




1. Click "Setup"
2. Click the "Unlock" label

After pressing the unlock label, the selected user should be unlocked from the system.

# TEAMS

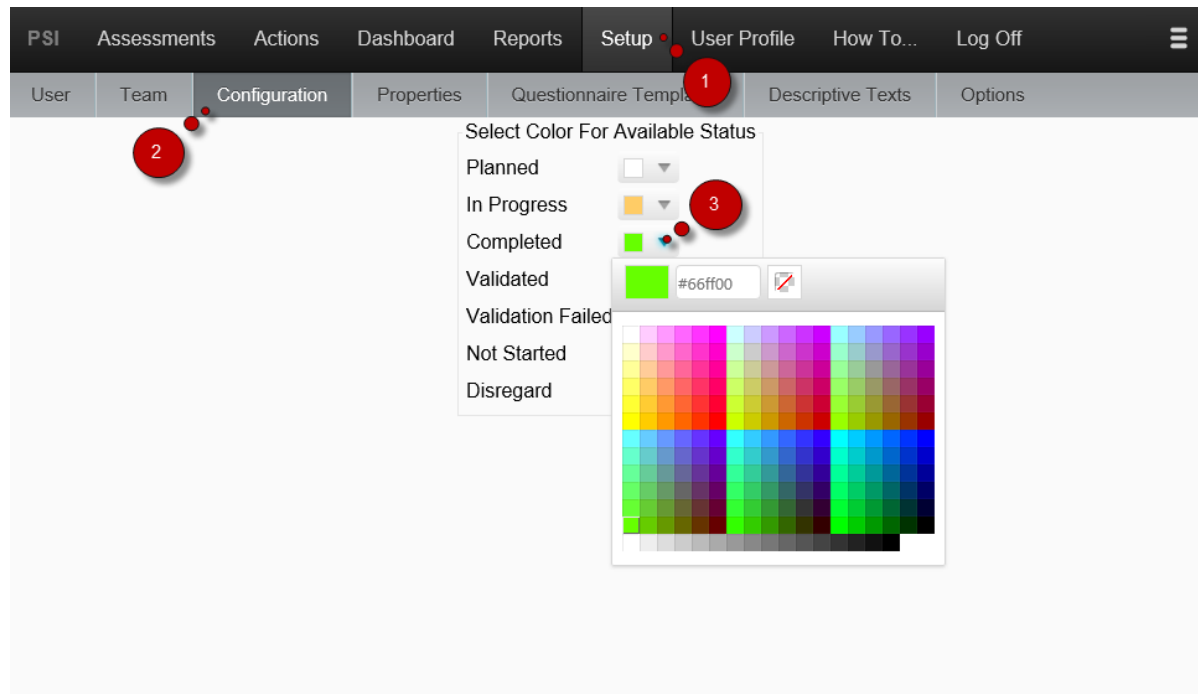
---

- Teams are used for allocating responsibility for implementing the Actions.
- Each Team has a Team Leader.
- When an Action is allocated to a Team, all notifications are sent to the Team Leader for the Team.

 To configure Teams speak with the Administrator.

# CONFIGURATION

Here you can configure the colour of the foreground of assessments and actions



1. Browse to the Setup tab
2. Select the Configuration tab
3. Select the status on which you would like to alter the colour

Example :

STATUS	
▶ --Select Option-- ▼	Completed
▶ --Select Option-- ▼	Completed
▶ --Select Option-- ▼	Completed
▶ --Select Option-- ▼	Completed

# PROPERTIES

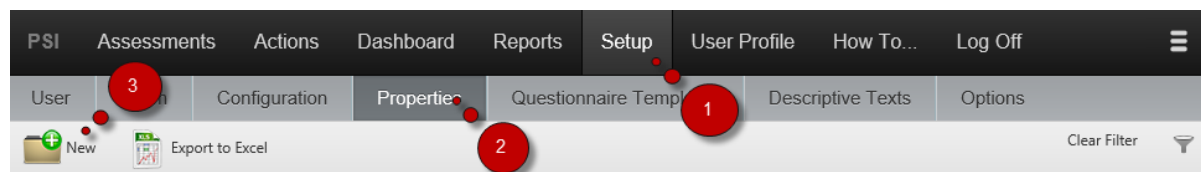
Properties can be added, edited and deleted within the properties setup tab.

## Adding new properties

### Editing properties

### Deleting properties

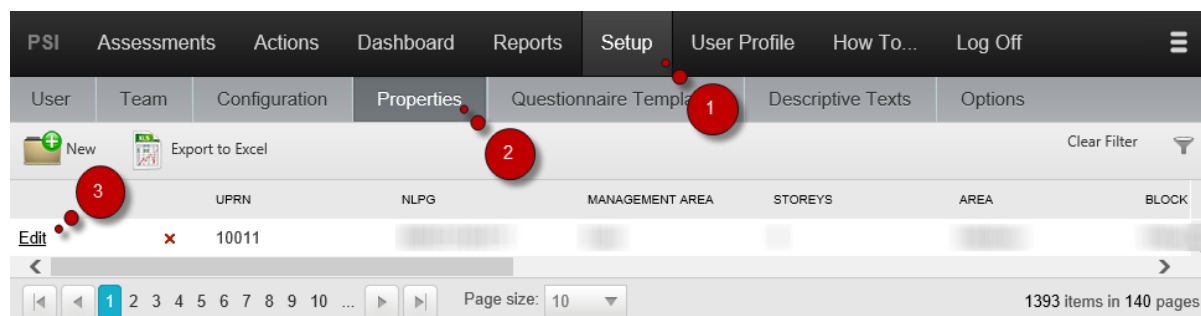
## Adding new properties



1. Select setup
2. Select properties
3. Press "New"

4. Fill in all of the required information
5. Click "Insert"

## Editing properties



1. Select setup
2. Select properties

## 3. Click on "Edit"

The screenshot shows the 'Properties' table in the PSI2000 application. The table has columns: UPRN, NLPG, MANAGEMENT AREA, STOREYS, AREA, and BLOCK. The first row shows UPRN 10011. Below the table are pagination controls showing 'Page size: 10' and '1393 items in 140 pages'. Red callouts are present: callout 4 points to the 'Update' button, and callout 5 points to the 'Edit' button.

## 4. Edit any\* desired field

## 5. Click "Update"

✿ UPRN of the property cannot be changed. Please delete and add the property to change the UPRN.

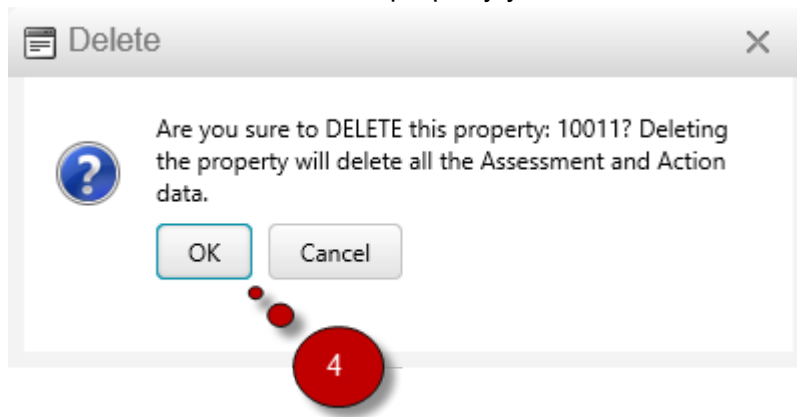
## Deleting properties

The screenshot shows the 'Properties' table in the PSI2000 application. The table has columns: UPRN, NLPG, MANAGEMENT AREA, STOREYS, AREA, and BLOCK. The first row shows UPRN 10011. Below the table are pagination controls showing 'Page size: 10' and '1393 items in 140 pages'. Red callouts are present: callout 1 points to the 'Setup' menu, callout 2 points to the 'Properties' tab, and callout 3 points to the 'Edit' button.

## 1. Select setup

## 2. Select properties

3. Press the red cross next to a property you would like to delete



4. Click "OK" !

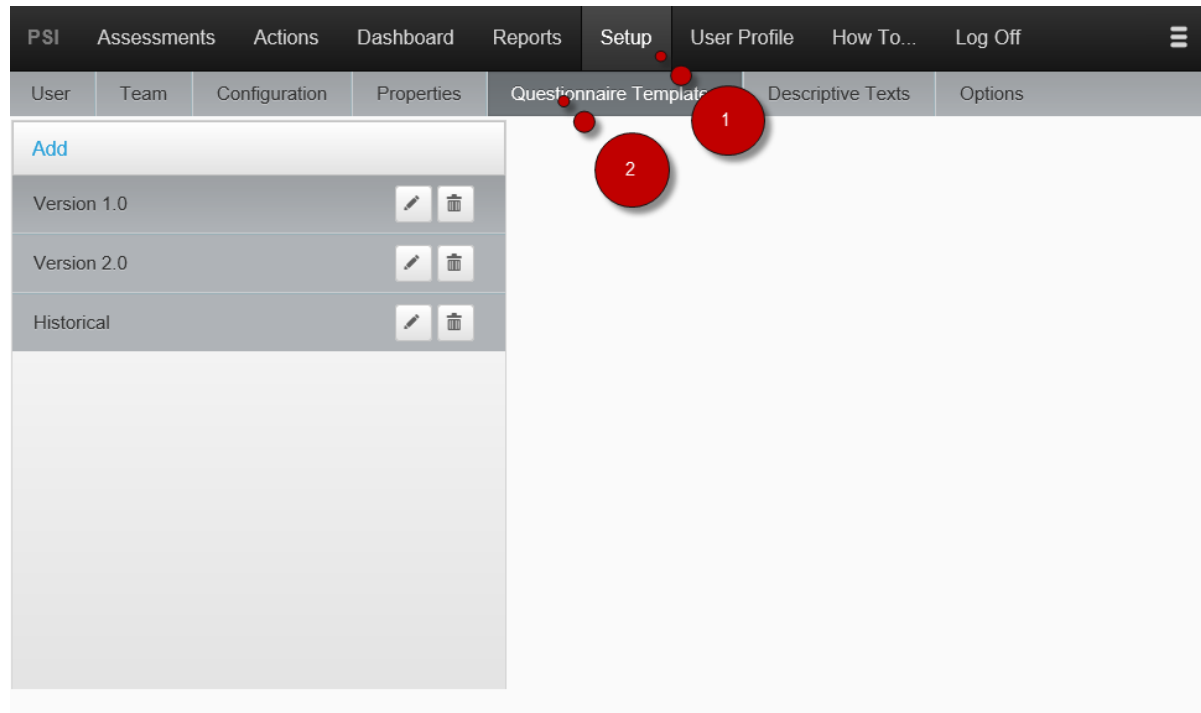


After pressing ok, the property and its assessments and actions will be deleted

# QUESTIONNAIRE TEMPLATES

Questionnaire Templates are used for Assessments. The selected template for an Assessment determines the default entry required for the Assessment to be applicable for completion.

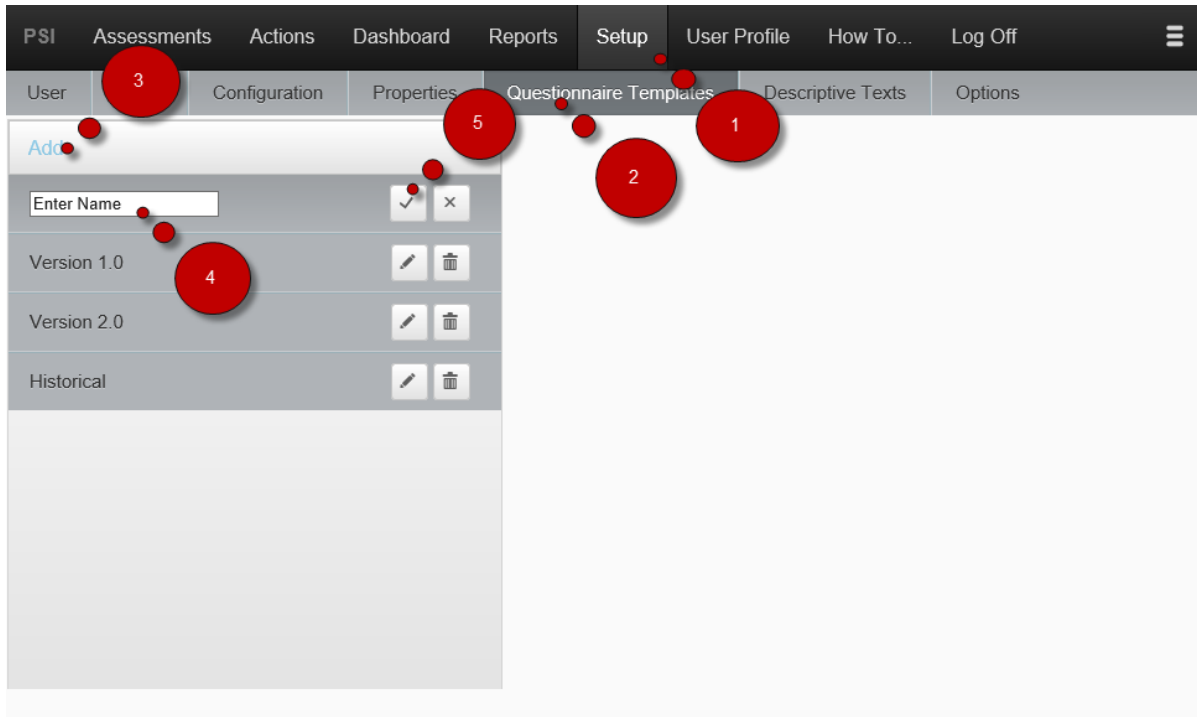
## To View the Templates:



1. Select Setup
2. Select Questionnaire Templates

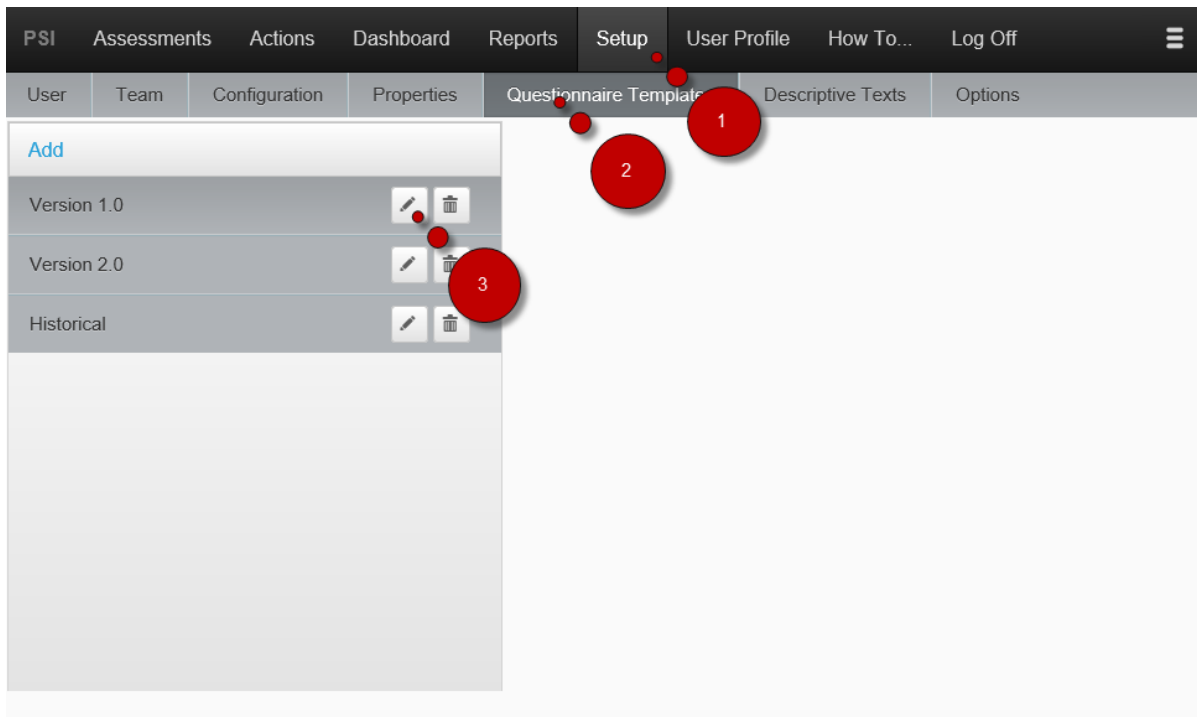


## To Add a Template



1. Select Setup
2. Select Questionnaire Templates
3. Click 'Add'
4. Enter Name
5. Click OK Icon

## To Edit a Template



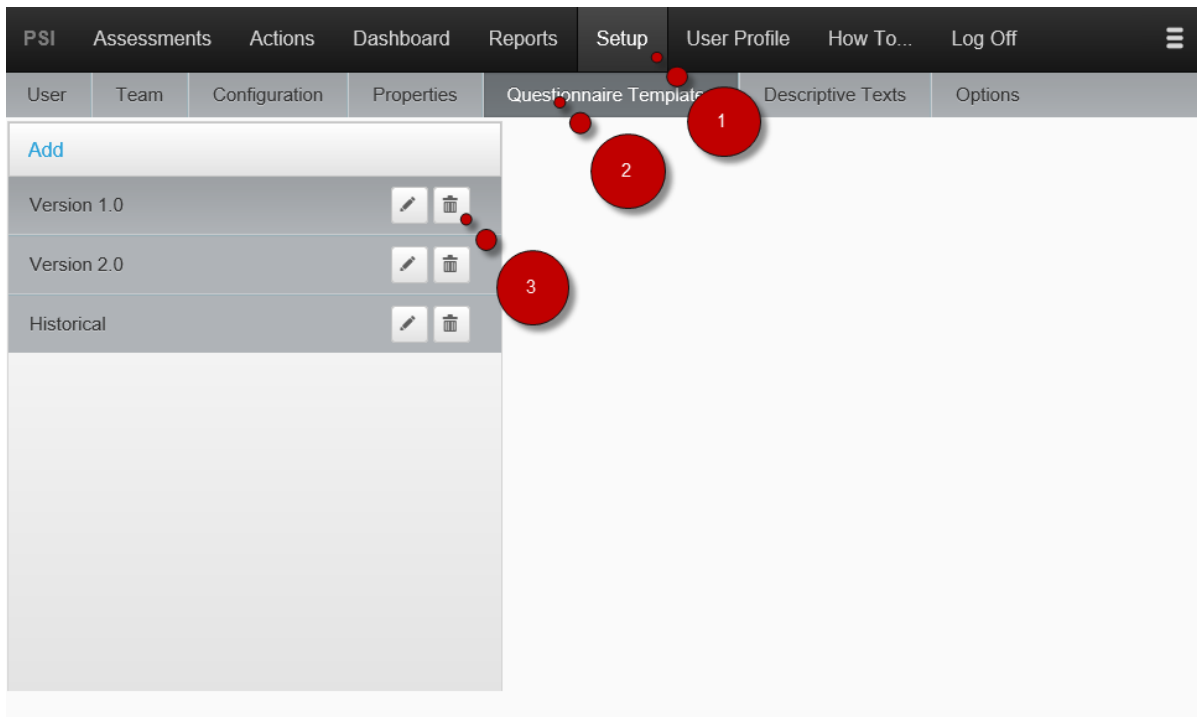
1. Select Setup
2. Select Questionnaire Templates
3. Click Edit Icon



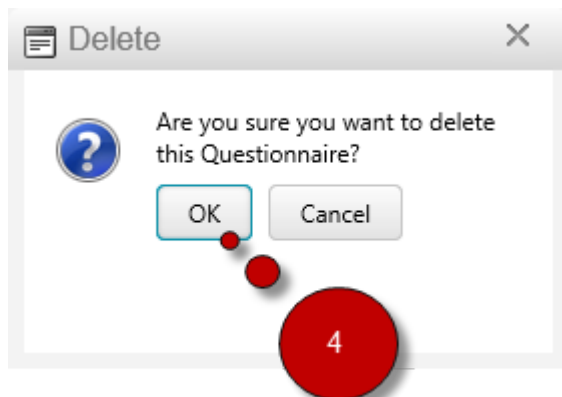
4. Edit Name
5. Click OK Icon

## To Delete a Template

\* The questionnaire will fail to delete if any Assessments are using the Template



1. Select Setup
2. Select Questionnaire Templates
3. Click Delete Icon



4. Click 'OK'

#### Related Topics

[Questionnaire Sections](#)

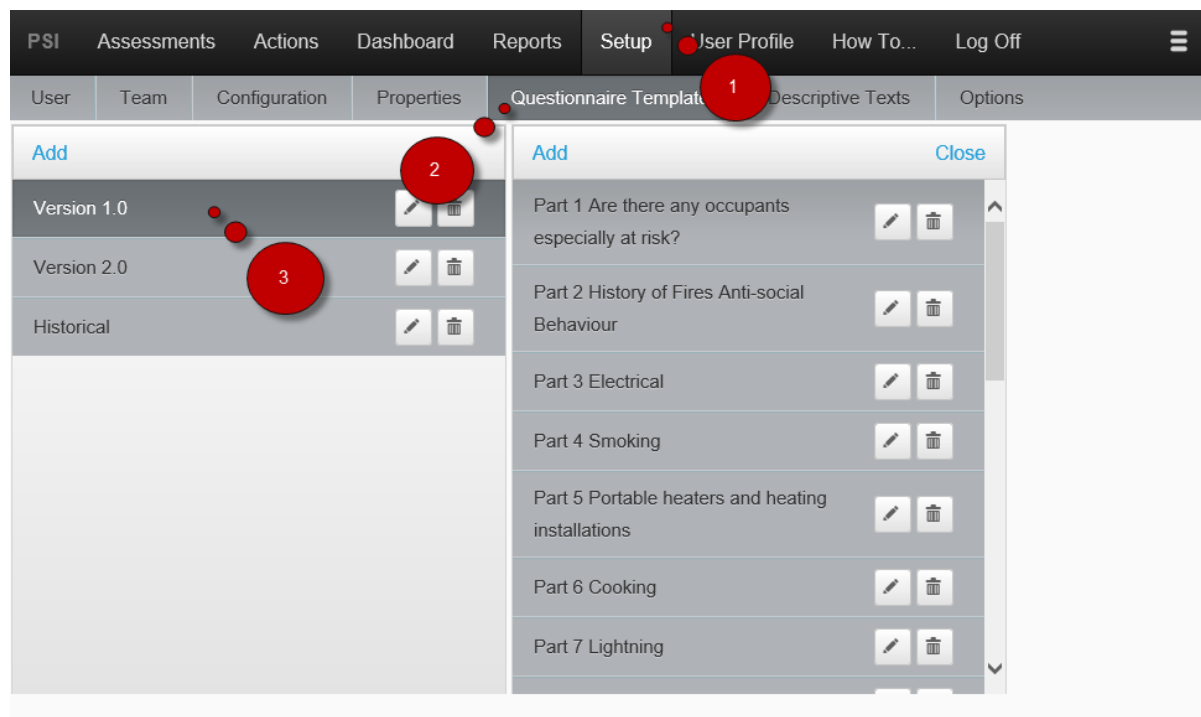
[Significant Findings and Defects](#)

[Normal Questions](#)

# Questionnaire Sections

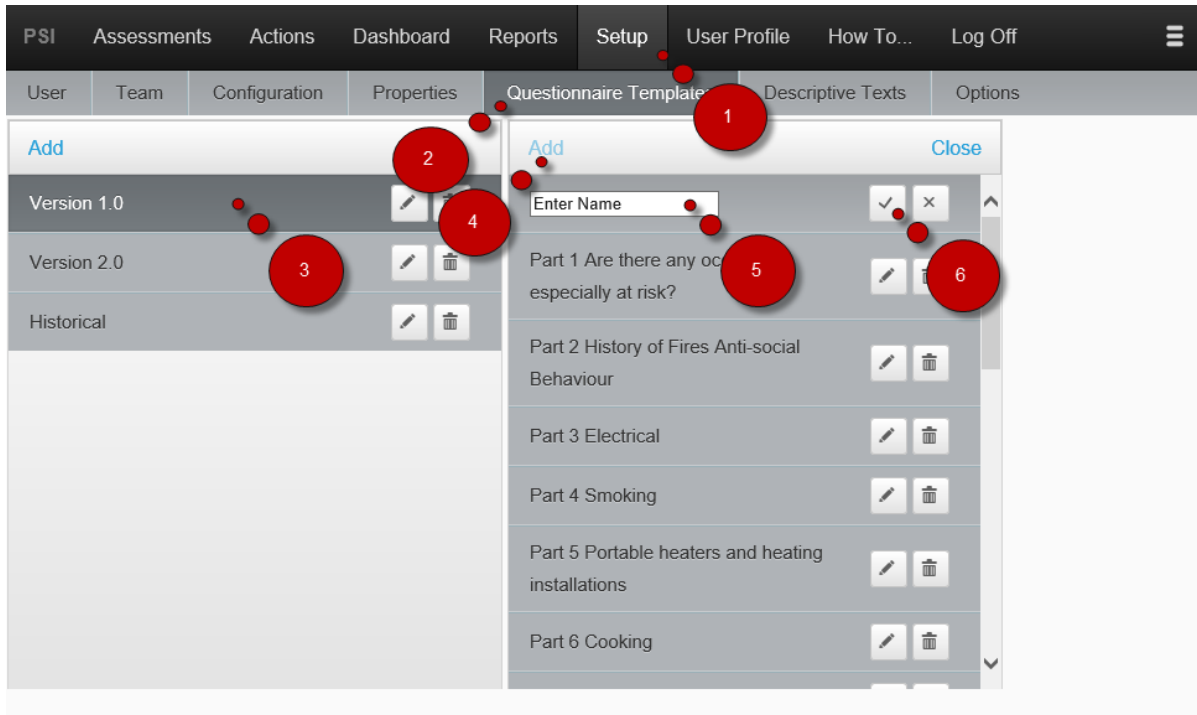
**Questionnaire Sections define the groups of Significant Findings and Defects and Normal Questions that will be shown in the Assessment**

**To View the available Sections:**



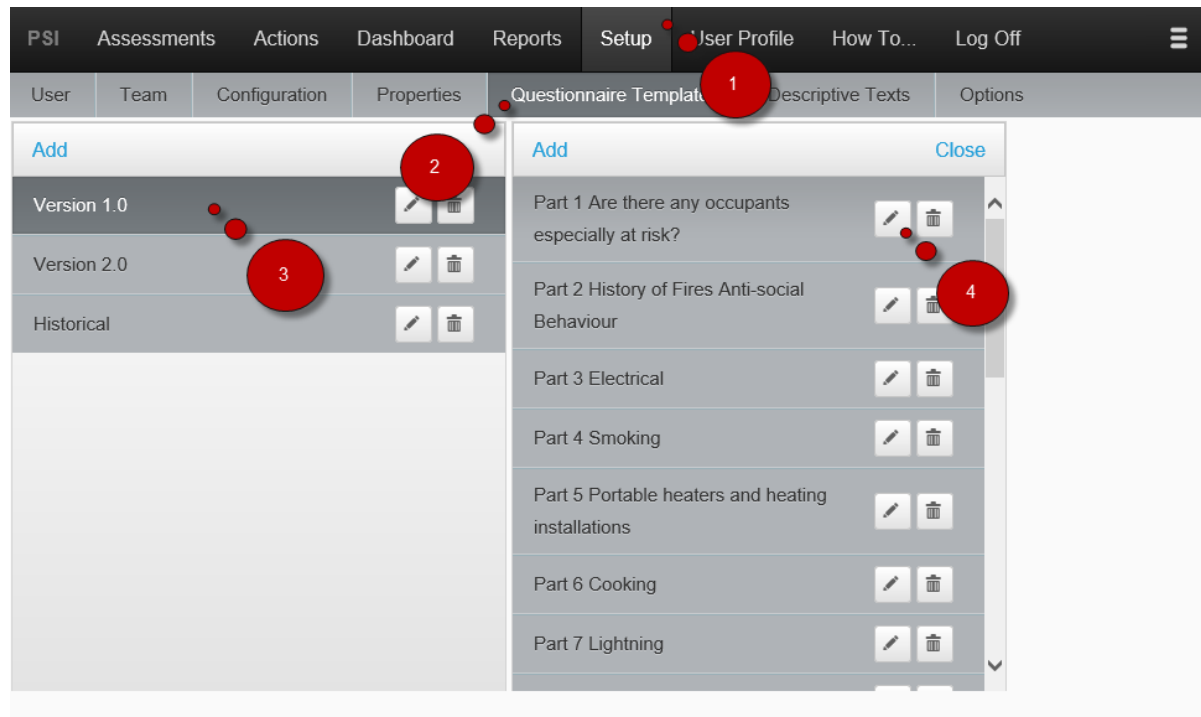
1. Select Setup
2. Select Questionnaire Templates
3. Select a Questionnaire

## To Add a Section

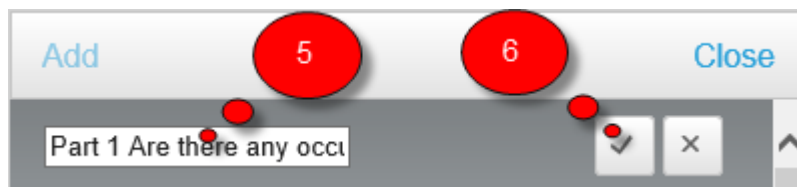


1. Select Setup
2. Select Questionnaire Templates
3. Select a Questionnaire
4. Click 'Add'
5. Enter a Section Name
6. Click OK Icon

## To Edit a Section

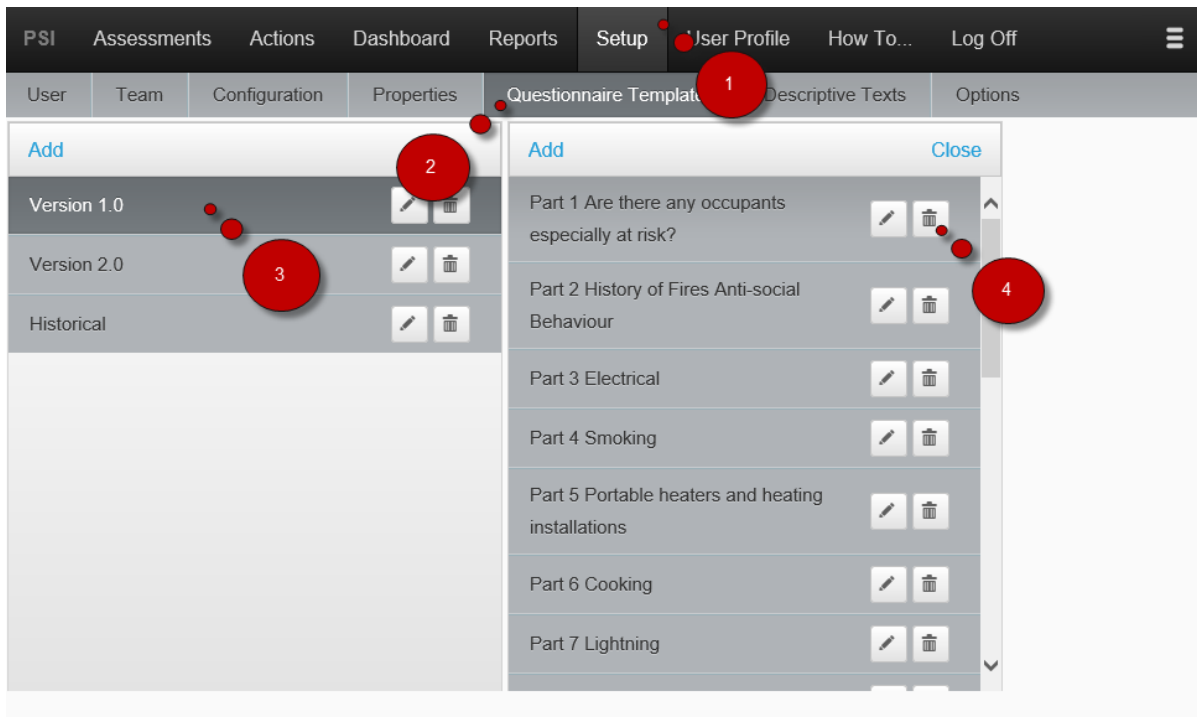


1. Select Setup
2. Select Questionnaire Templates
3. Select a Questionnaire
4. Click Edit Icon

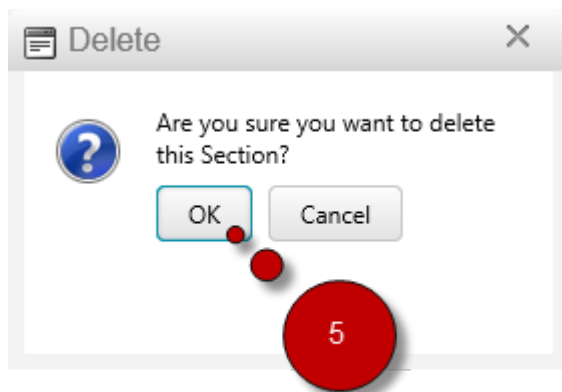


5. Edit the Section Name
6. Click OK Icon

## To Delete a Section



1. Select Setup
2. Select Questionnaire Templates
3. Select a Questionnaire
4. Click Delete Icon

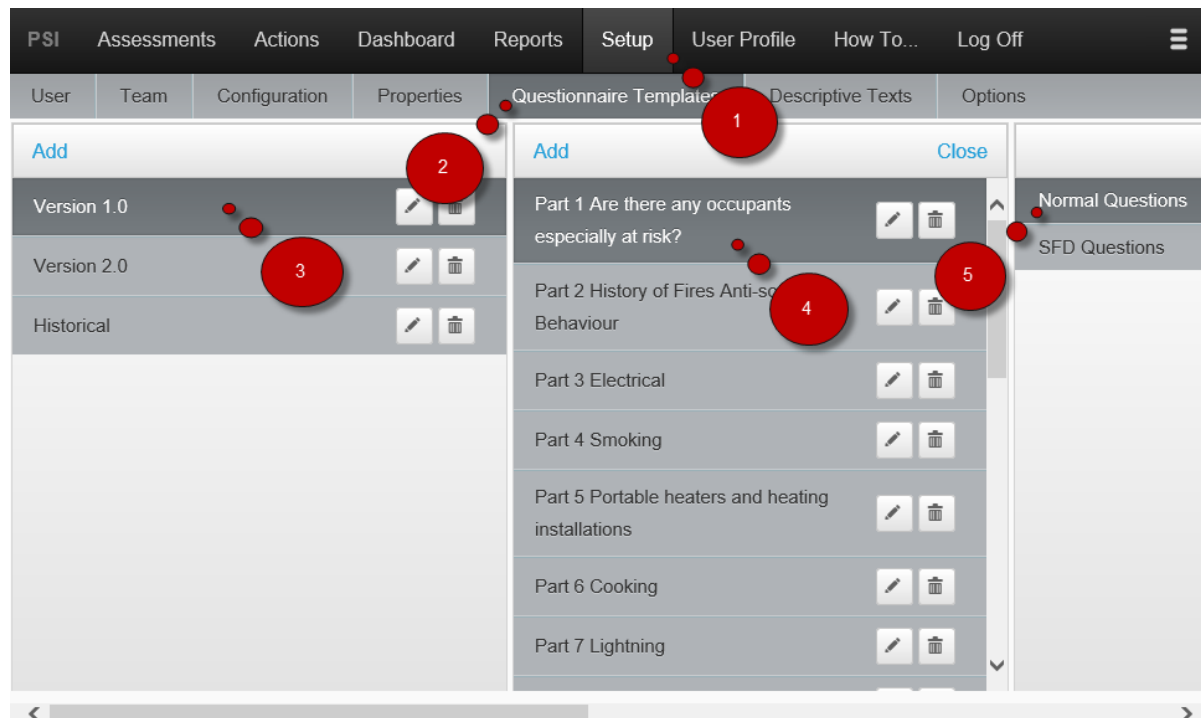


5. Click 'OK'

# Normal Questions

Normal Questions templates appear on opening a Section in an Assessment

To View Normal Question Templates for a Section



1. Select Setup
2. Select Questionnaire Templates
3. Select a Questionnaire
4. Select a Section
5. Select 'Normal Questions'



## To Select a Normal Question for a Section

### 1 Navigate to Normal Question Templates

The screenshot shows the 'Questionnaire Templates' interface. The top navigation bar includes 'PSI', 'Assessments', 'Actions', 'Dashboard', 'Reports', 'Setup', 'User Profile', 'How To...', and 'Log Off'. The sub-navigation bar includes 'User', 'Team', 'Configuration', 'Properties', 'Questionnaire Templates' (highlighted), 'Descriptive Texts', and 'Options'. The main area is divided into 'Available' and 'Selected' columns. The 'Available' column lists four questions with their input types and options groups. The 'Selected' column lists three questions. Red circles with numbers 1 through 4 indicate the steps: 1. Click 'Save' (top left), 2. Click the 'Right Arrow' icon (between columns), 3. Click the 'Right Arrow' icon (between columns), and 4. Click 'Save' (top left).

Available	Selected
<b>Text:</b> 0000 - 0400 <b>Input Type:</b> Integer <b>Options Group:</b> N/A	<b>Text:</b> Number of people sleeping <b>Input Type:</b> Text <b>Options Group:</b> N/A
<b>Text:</b> 0400 - 0800 <b>Input Type:</b> Integer <b>Options Group:</b> N/A	<b>Text:</b> Number of disabled people <b>Input Type:</b> Text <b>Options Group:</b> N/A
<b>Text:</b> 0800 - 1200 <b>Input Type:</b> Integer <b>Options Group:</b> N/A	<b>Text:</b> Has PEEPs been done? <b>Input Type:</b> Select <b>Options Group:</b> yes_no_notapplicable
<b>Text:</b> 1200 - 1600 <b>Input Type:</b> Integer	<b>Text:</b> Number of Lone workers <b>Input Type:</b> Text

2 Select an Item from Available List

3 Click 'Right Arrow' Icon to Add to a Section

4 Click 'Save'

## To Remove a Normal Question from a Section

### 1 Navigate to Normal Question Templates

The screenshot shows the 'Questionnaire Templates' interface. The top navigation bar includes 'PSI', 'Assessments', 'Actions', 'Dashboard', 'Reports', 'Setup', 'User Profile', 'How To...', and 'Log Off'. Below this, a sub-navigation bar includes 'User', 'Team', 'Configuration', 'Properties', 'Questionnaire Templates', 'Descriptive Texts', and 'Options'. The main content area is divided into two panels: 'Available' and 'Selected'. The 'Available' panel lists four questions with their input types and options groups. The 'Selected' panel lists three questions. Red circles with numbers 1 through 4 highlight the following elements: 1. The 'Save' button in the top left of the 'Available' panel. 2. The 'Add' button in the top left of the 'Selected' panel. 3. The 'Left Arrow' icon in the center between the two panels. 4. The 'Save' button in the top right of the 'Selected' panel.

Available	Selected
<b>Text:</b> 0000 - 0400 <b>Input Type:</b> Integer <b>Options Group:</b> N/A	<b>Text:</b> Number of people sleeping <b>Input Type:</b> Text <b>Options Group:</b> N/A
<b>Text:</b> 0400 - 0800 <b>Input Type:</b> Integer <b>Options Group:</b> N/A	<b>Text:</b> Number of disabled people <b>Input Type:</b> Text <b>Options Group:</b> N/A
<b>Text:</b> 0800 - 1200 <b>Input Type:</b> Integer <b>Options Group:</b> N/A	<b>Text:</b> Has PEEPs been done? <b>Input Type:</b> Select <b>Options Group:</b> yes_no_notapplicable
<b>Text:</b> 1200 - 1600 <b>Input Type:</b> Integer	<b>Text:</b> Number of Lone workers <b>Input Type:</b> Text

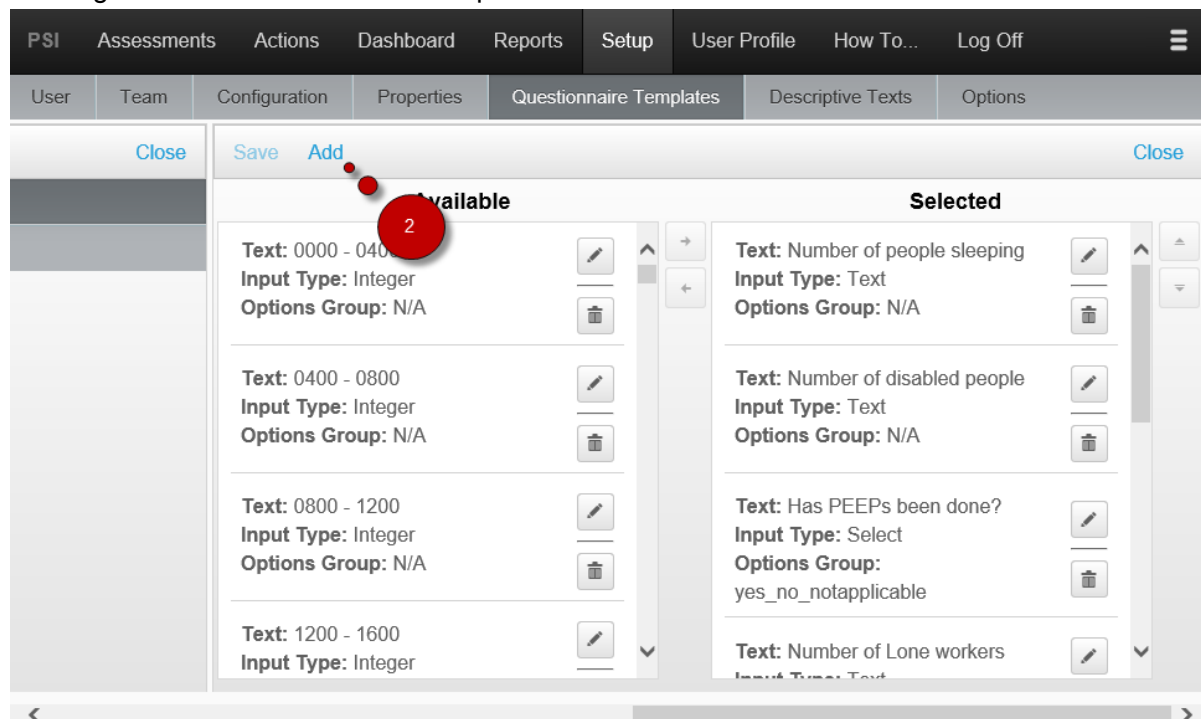
### 2 Select an Item from Selected List

### 3 Click 'Left Arrow' Icon to Remove from a Section

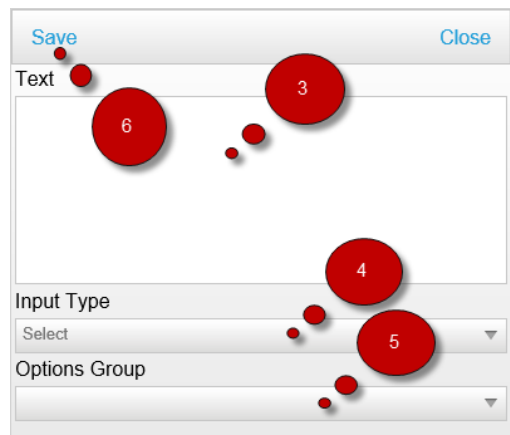
### 4 Click 'Save'

## To Add New Normal Question

### 1 Navigate to Normal Question Templates



### 2 Click 'Add'



### 3 Enter Question Text

### 4 Select Input type for Answer

### 5 Select Option Group (Only Applicable for Input Type 'Select')

### 7 Click 'Save'

## To Edit a Normal Question

✿ Changes will be reflected on all Sections where the Edited Normal Question is Selected

### 1 Navigate to Normal Question Templates

The screenshot shows the 'Questionnaire Templates' section of the PSI2000 interface. The top navigation bar includes 'PSI', 'Assessments', 'Actions', 'Dashboard', 'Reports', 'Setup', 'User Profile', 'How To...', and 'Log Off'. Below this, a sub-navigation bar includes 'User', 'Team', 'Configuration', 'Properties', 'Questionnaire Templates' (highlighted), 'Descriptive Texts', and 'Options'. The main area is divided into 'Available' and 'Selected' columns. The 'Available' column lists four questions with red callout '2' pointing to the first one. The 'Selected' column lists three questions.

Available	Selected
Text: 0000 - 0400 Input Type: Integer Options Group: N/A	Text: Number of people sleeping Input Type: Text Options Group: N/A
Text: 0400 - 0800 Input Type: Integer Options Group: N/A	Text: Number of disabled people Input Type: Text Options Group: N/A
Text: 0800 - 1200 Input Type: Integer Options Group: N/A	Text: Has PEEPs been done? Input Type: Select Options Group: yes_no_notapplicable
Text: 1200 - 1600 Input Type: Integer	Text: Number of Lone workers Input Type: Text

### 2 Click Edit Icon

The screenshot shows the 'Edit Question' dialog box. Red callouts 3, 4, 5, and 6 point to the 'Text', 'Input Type', 'Options Group', and 'Save' buttons respectively.

Text: 0000 - 0400

Input Type: Select

Options Group:

Save

### 3 Edit Question Text

### 4 Select Input type for Answer

### 5 Select Options Group (Only Applicable for Input Type 'Select')

### 6 Click 'Save'

## To Delete a Normal Question

✿ Deleted Item will be removed on all Sections where the Normal Question is Selected

### 1 Navigate to Normal Question Templates

The screenshot shows the 'Questionnaire Templates' window with a dark header bar containing navigation links: PSI, Assessments, Actions, Dashboard, Reports, Setup, User Profile, How To..., and Log Off. Below the header is a sub-header with tabs: User, Team, Configuration, Properties, Questionnaire Templates (active), Descriptive Texts, and Options. The main area is divided into two columns: 'Available' and 'Selected'. The 'Available' column lists four questions with their input types and options groups. A red circle with the number 2 points to the delete icon (trash can) of the first question. The 'Selected' column lists three questions with their input types and options groups.

Available	Selected
<b>Text:</b> 0000 - 0400 <b>Input Type:</b> Integer <b>Options Group:</b> N/A	<b>Text:</b> Number of people sleeping <b>Input Type:</b> Text <b>Options Group:</b> N/A
<b>Text:</b> 0400 - 0800 <b>Input Type:</b> Integer <b>Options Group:</b> N/A	<b>Text:</b> Number of disabled people <b>Input Type:</b> Text <b>Options Group:</b> N/A
<b>Text:</b> 0800 - 1200 <b>Input Type:</b> Integer <b>Options Group:</b> N/A	<b>Text:</b> Has PEEPs been done? <b>Input Type:</b> Select <b>Options Group:</b> yes_no_notapplicable
<b>Text:</b> 1200 - 1600 <b>Input Type:</b> Integer	<b>Text:</b> Number of Lone workers <b>Input Type:</b> Text

### 2 Click Delete Icon

The screenshot shows a 'Delete' dialog box with a question mark icon. The text inside reads: 'Deleting the Normal Question will remove it from other sections. Do you want to continue?'. There are two buttons at the bottom: 'OK' and 'Cancel'. A red circle with the number 3 points to the 'OK' button.

### 3 Click 'OK'

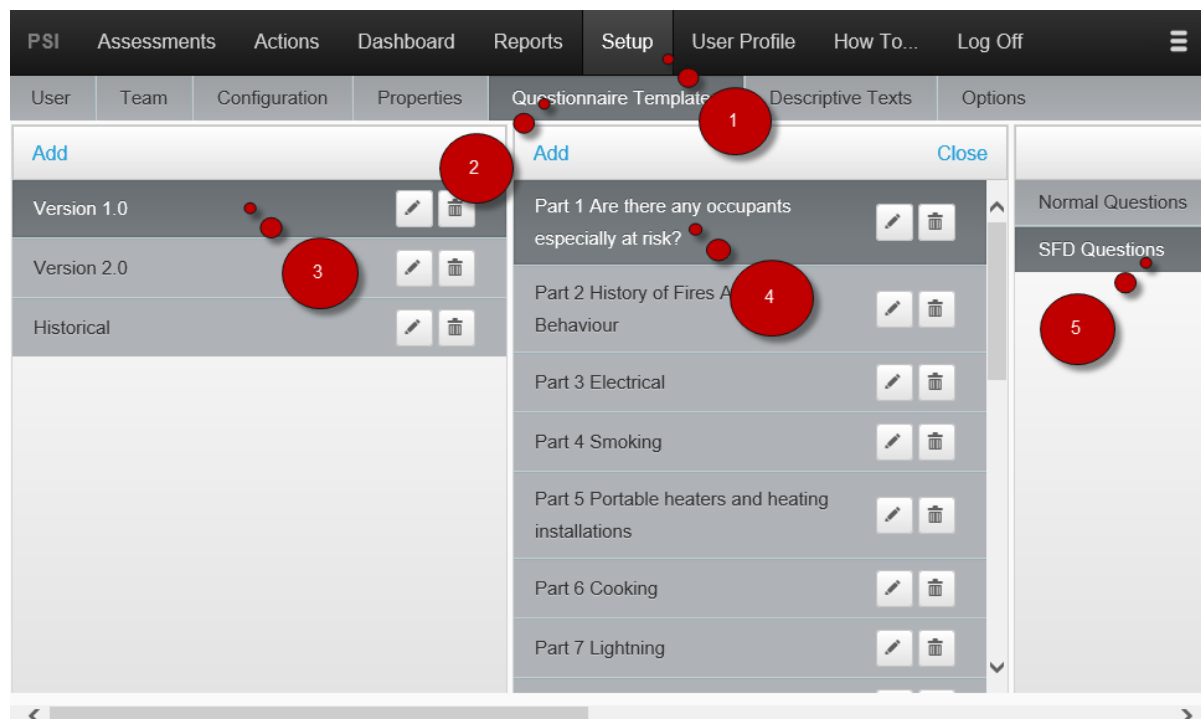
**Related Topics**

[Options](#)

# Significant Findings and Defects

**Significant Findings and Defects define the Templates that appear when opening a Section within an Assessment Questionnaire**

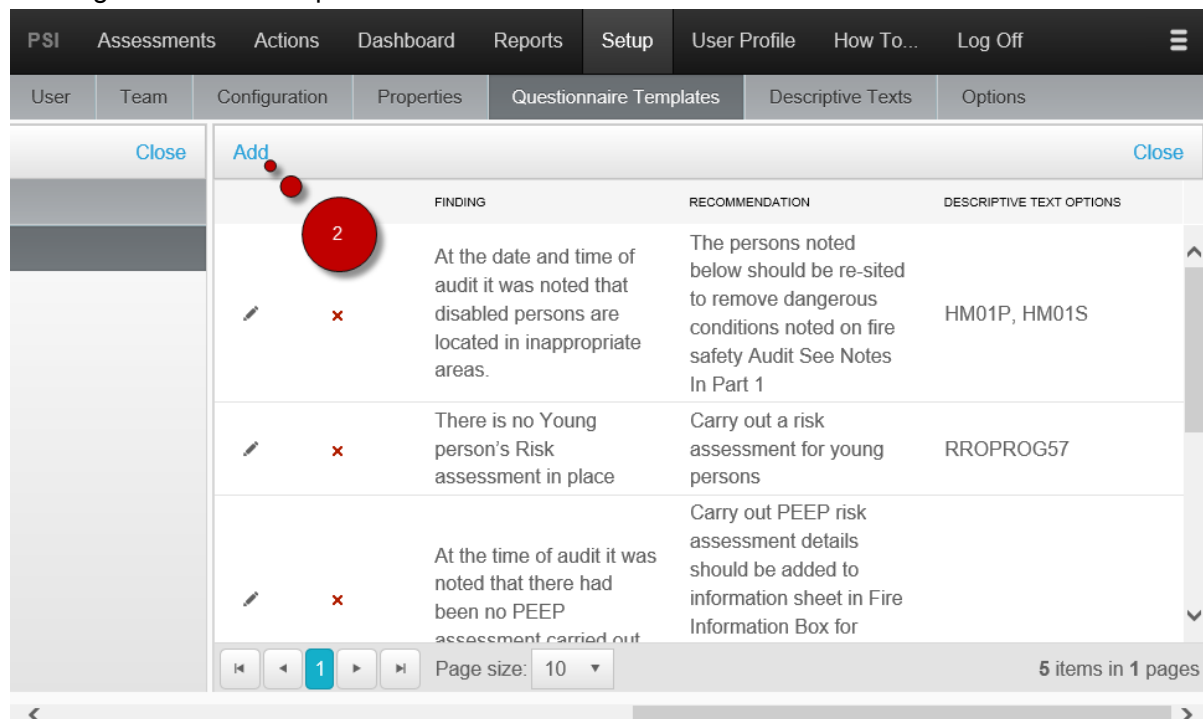
## To View available Templates for a Section



1. Select Setup
2. Select Questionnaire Templates
3. Select a Questionnaire
4. Select a Section
5. Select 'SFD Questions'

## To Add a SFD Template to a Section

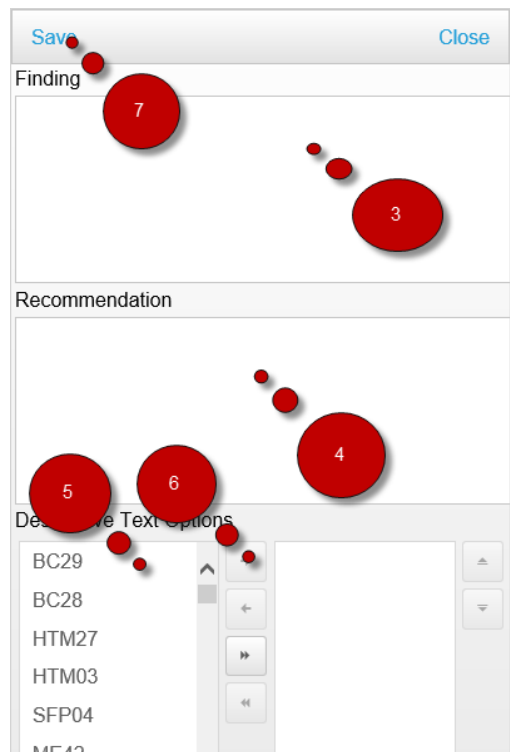
### 1 Navigate to SFD Templates



FINDING	RECOMMENDATION	DESCRIPTIVE TEXT OPTIONS
At the date and time of audit it was noted that disabled persons are located in inappropriate areas.	The persons noted below should be re-sited to remove dangerous conditions noted on fire safety Audit See Notes In Part 1	HM01P, HM01S
There is no Young person's Risk assessment in place	Carry out a risk assessment for young persons	RROPROG57
At the time of audit it was noted that there had been no PEEP assessment carried out	Carry out PEEP risk assessment details should be added to information sheet in Fire Information Box for	

Page size: 10 5 items in 1 pages

### 2 Click 'Add'



Save Close

Finding

Recommendation

Descriptive Text Options

- BC29
- BC28
- HTM27
- HTM03
- SFP04
- MF12

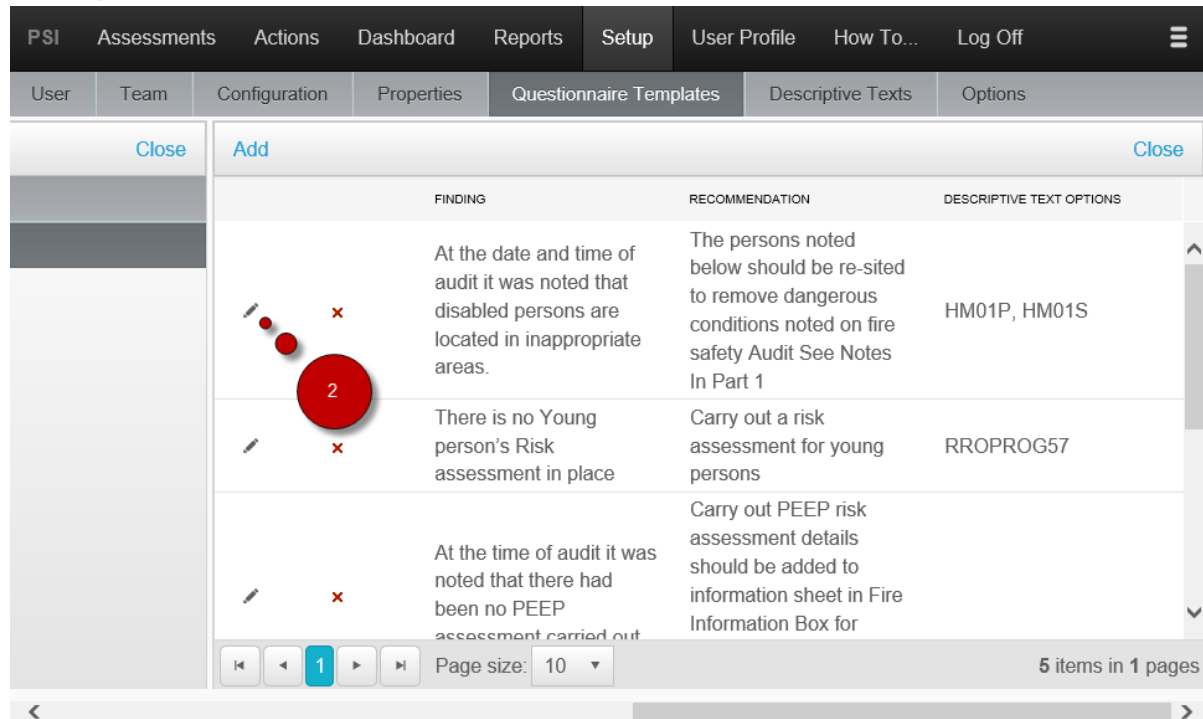
### 3 Enter the Finding Text



- 4 Enter the Recommendation Text
- 5 Select a relevant Descriptive Text option
- 6 Click “Right Arrow” Icon
- 7 Click ‘Save’

## To Edit a SFD Template

### 1 Navigate to SFD Templates



The screenshot shows the PSI2000 software interface. The top navigation bar includes 'PSI', 'Assessments', 'Actions', 'Dashboard', 'Reports', 'Setup', 'User Profile', 'How To...', and 'Log Off'. Below this is a sub-navigation bar with 'User', 'Team', 'Configuration', 'Properties', 'Questionnaire Templates' (selected), 'Descriptive Texts', and 'Options'. The main content area displays a table of findings. A red circle with the number '2' highlights the 'Edit' icon (a pencil) next to the first finding. The table has three columns: 'FINDING', 'RECOMMENDATION', and 'DESCRIPTIVE TEXT OPTIONS'. The first finding is: 'At the date and time of audit it was noted that disabled persons are located in inappropriate areas.' with the recommendation: 'The persons noted below should be re-sited to remove dangerous conditions noted on fire safety Audit See Notes In Part 1' and descriptive text options: 'HM01P, HM01S'. The second finding is: 'There is no Young person's Risk assessment in place' with the recommendation: 'Carry out a risk assessment for young persons' and descriptive text options: 'RROPROG57'. The third finding is: 'At the time of audit it was noted that there had been no PEEP assessment carried out' with the recommendation: 'Carry out PEEP risk assessment details should be added to information sheet in Fire Information Box for'. The bottom of the table shows 'Page size: 10' and '5 items in 1 pages'.

FINDING	RECOMMENDATION	DESCRIPTIVE TEXT OPTIONS
At the date and time of audit it was noted that disabled persons are located in inappropriate areas.	The persons noted below should be re-sited to remove dangerous conditions noted on fire safety Audit See Notes In Part 1	HM01P, HM01S
There is no Young person's Risk assessment in place	Carry out a risk assessment for young persons	RROPROG57
At the time of audit it was noted that there had been no PEEP assessment carried out	Carry out PEEP risk assessment details should be added to information sheet in Fire Information Box for	

Page size: 10 5 items in 1 pages

### 2 Click Edit Icon

The screenshot displays a software interface for a fire safety system. It features three main sections: 'Finding', 'Recommendation', and 'Descriptive Text Options'. The 'Finding' section contains a text area with a red circle labeled '6' over the word 'date'. The 'Recommendation' section contains a text area with a red circle labeled '4' over the word 'Audit'. The 'Descriptive Text Options' section contains a list of codes (BC29, BC28, HTM27, HTM03, SFP04) on the left and a list of codes (HM01S, HM01P) on the right, with a red circle labeled '5' over the 'HTM27' code. A red circle labeled '3' is positioned over the 'Recommendation' section. The interface also includes 'Save' and 'Close' buttons at the top.

Save Close

**Finding**

At the date of audit it was noted that disabled persons are located in inappropriate areas.

**Recommendation**

The persons noted below should be re-sited to remove dangerous conditions noted on fire safety Audit

See Notes In Part 1

**Descriptive Text Options**

BC29	HM01S
BC28	HM01P
HTM27	
HTM03	
SFP04	

3 Edit the Finding Text

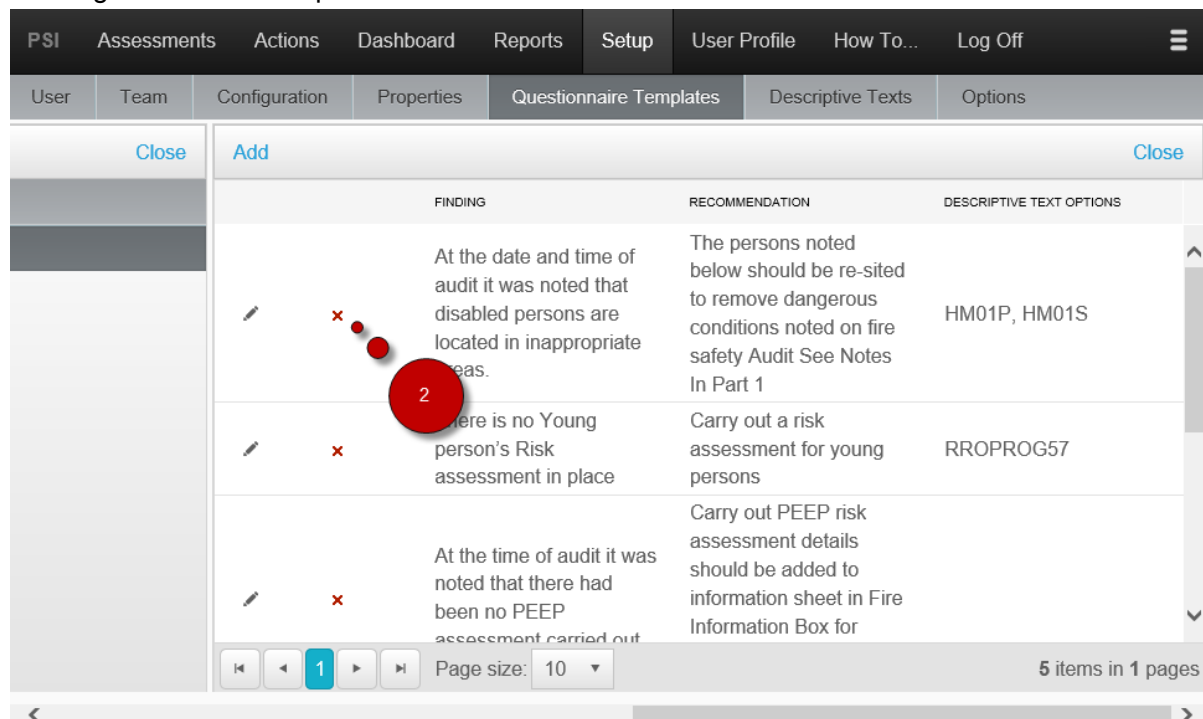
4 Edit the Recommendation Text

5 Edit the relevant Descriptive Text Options

6 Click 'Save'

## To Delete a SFD from Template

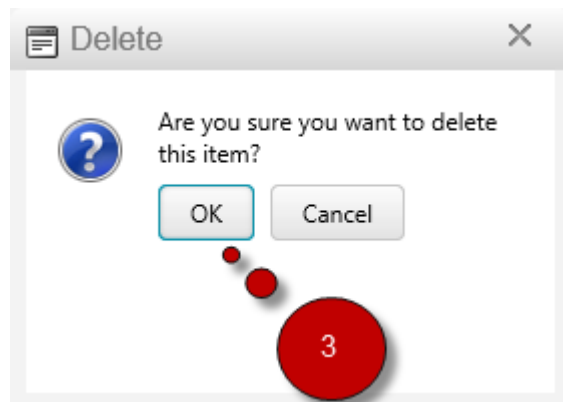
### 1 Navigate to SFD Templates



The screenshot shows the PSI2000 application interface. The top navigation bar includes 'PSI', 'Assessments', 'Actions', 'Dashboard', 'Reports', 'Setup', 'User Profile', 'How To...', and 'Log Off'. Below this is a sub-navigation bar with 'User', 'Team', 'Configuration', 'Properties', 'Questionnaire Templates', 'Descriptive Texts', and 'Options'. The 'Questionnaire Templates' tab is active, displaying a table with three rows of findings. Each row has a delete icon (a red 'x') and a red circle with the number '2' is placed over the first delete icon. The table columns are 'FINDING', 'RECOMMENDATION', and 'DESCRIPTIVE TEXT OPTIONS'. The bottom of the table shows 'Page size: 10' and '5 items in 1 pages'.

FINDING	RECOMMENDATION	DESCRIPTIVE TEXT OPTIONS
At the date and time of audit it was noted that disabled persons are located in inappropriate areas.	The persons noted below should be re-sited to remove dangerous conditions noted on fire safety Audit See Notes In Part 1	HM01P, HM01S
There is no Young person's Risk assessment in place	Carry out a risk assessment for young persons	RR0PROG57
At the time of audit it was noted that there had been no PEEP assessment carried out	Carry out PEEP risk assessment details should be added to information sheet in Fire Information Box for	

### 2 Click Delete Icon



### 3 Click 'OK'

### Relevant topics

[DESCRIPTIVE TEXTS](#)

# DESCRIPTIVE TEXTS

## Add

The screenshot shows a web application interface for adding a new record. The top navigation bar includes tabs: PSI, Assessments, Actions, Dashboard, Reports, Setup (highlighted with callout 1), User Profile, How To..., and Log Off. Below this is a sub-navigation bar with tabs: User, Team, Configuration, Properties, Questionnaire Temp (highlighted with callout 1), Descriptive Texts (highlighted with callout 2), and Options. The main content area has a header with a '+ Add new record' button (callout 3) and a 'Refresh' button. Below the header are two input fields: 'NAME' (callout 5) and 'DETAILS' (callout 4). The 'NAME' field has a dropdown arrow. The 'DETAILS' field is a large text area. At the bottom left, there is a confirmation area with a checkmark icon (callout 6) and an 'x' icon. A small input field with a callout 5 is also present near the confirmation area.

1. Press the Setup tab
2. Press the Descriptive Texts tab
3. Press the 'Add new record' button
4. Add details of your Descriptive Text
5. Add a name for your Descriptive Text
6. Press the tick icon to insert your new Descriptive Text

## Edit

The screenshot shows the PSI2000 web application interface. The top navigation bar includes 'PSI', 'Assessments', 'Actions', 'Dashboard', 'Reports', 'Setup', 'User Profile', 'How To...', and 'Log Off'. The 'Setup' tab is active, and the sub-tab 'Descriptive Texts' is selected. Below the navigation bar, there is a '+ Add new record' button and a 'Refresh' button. The main content area displays a table with columns 'NAME' and 'DETAILS'. Two records are visible: 'RROPROG78' and 'RROPROG80'. Red callouts are placed over the interface: callout 1 points to the 'Setup' tab, callout 2 points to the 'Descriptive Texts' sub-tab, and callout 3 points to the pen icon next to the 'RROPROG78' record.

1. Press the Setup tab
2. Press the Descriptive Texts tab
3. Press the pen icon to edit the descriptive text

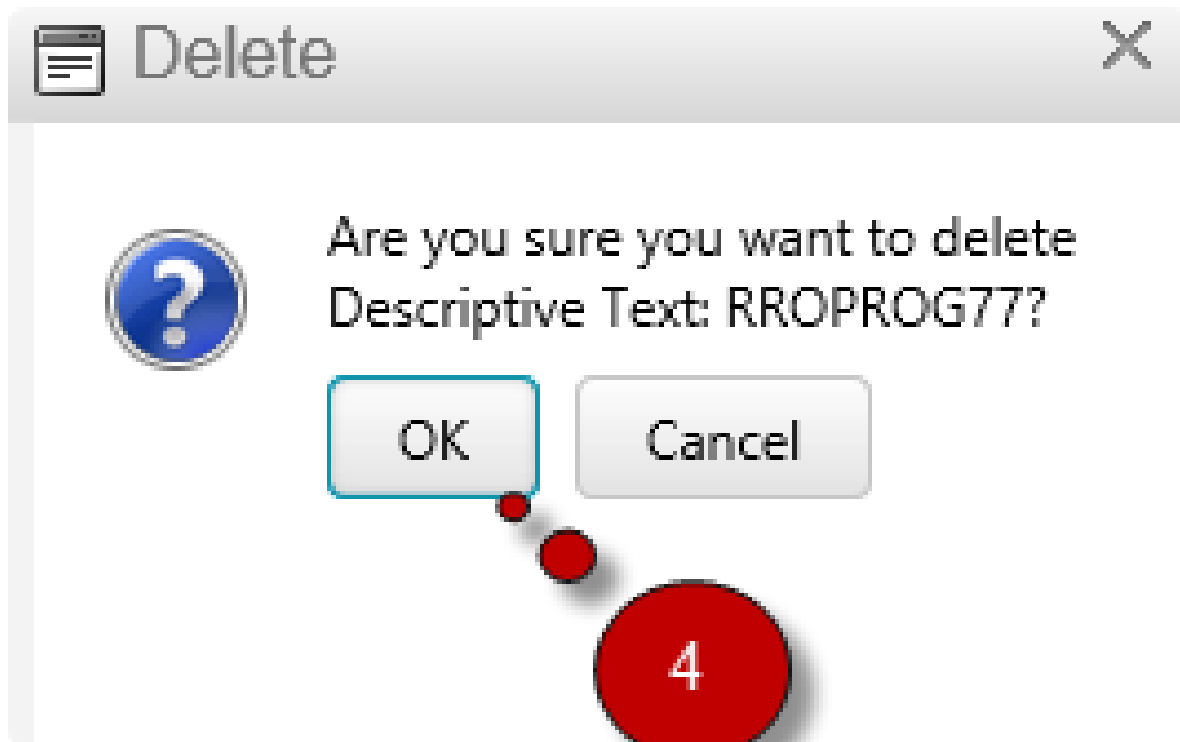
This screenshot shows the 'Descriptive Texts' sub-tab in the PSI2000 application. The 'RROPROG78' record is selected, and its details are displayed in a text area. Red callouts indicate the editing steps: callout 4 points to the text area, callout 5 points to the 'NAME' input field, and callout 6 points to the tick icon (✓) next to the record, which is used to save the changes.

4. Edit the name of the descriptive text
5. Edit the details of the descriptive text
6. Press the tick icon to update the descriptive text

## Remove

The screenshot shows the PSI2000 software interface. The top navigation bar includes tabs: PSI, Assessments, Actions, Dashboard, Reports, Setup, User Profile, How To..., and Log Off. The 'Setup' tab is active, and the 'Descriptive Texts' sub-tab is selected. Below the navigation bar, there is a '+ Add new record' button and a 'Refresh' button. The main area displays a table with columns 'NAME' and 'DETAILS'. Two entries are visible: 'RROPROG78' and 'RROPROG80'. A red cross icon is next to 'RROPROG78', and a red circle with the number 3 highlights it. The bottom of the screen shows a pagination bar with page numbers 49 to 58, a 'Page size: 10' dropdown, and a total of '574 items in 58 pages'.

1. Press the Setup tab
2. Press the Descriptive Texts tab
3. Locate the descriptive text you would like to delete and press the red cross icon



4. Press “OK” to delete the descriptive text !

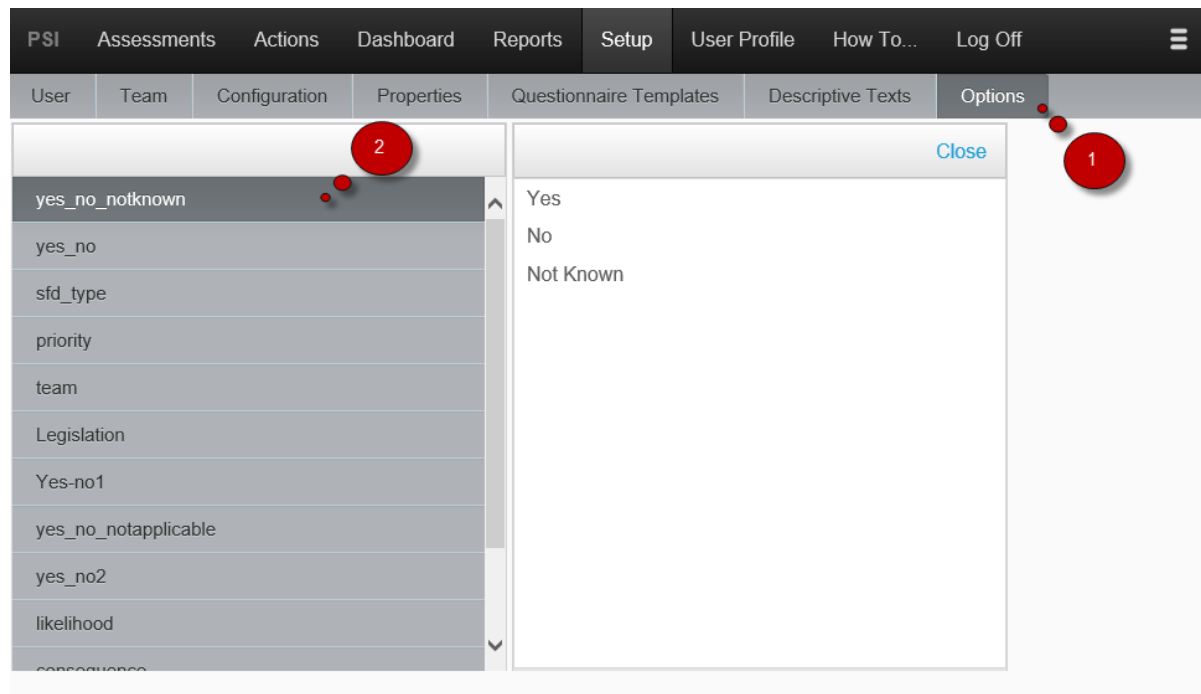


All SFD templates that use this item in their configuration will be removed

# OPTIONS

Options are used for setting the values for Normal Question configuration.

## View available values



1. Select Options
2. Select Option Group



# COMPLIANCE RULE FOR ASSESSMENT SECTION

---

The following rule is used for determining if within an assessment a section is compliant or not:

1. If, out of the group of questions, one or more is listed as 'Not Compliant', then the overall status for that part will be 'Not Compliant', regardless if there are any other questions listed as 'Compliant', or 'Not Applicable';
2. If, out of the group of questions, one or more is listed as 'Compliant, but the rest are listed as 'Not Applicable', then that part should be listed as 'Compliant';
3. If, all questions in a part are 'Not Applicable', then that part should be 'Not Applicable'.

# E-MAIL NOTIFICATION

## Assessment Notification Rule

- \* FSS uses templates for constructing the text for the notification. The text can be configured. To configure the text speak with Administrator.

	<a href="#">Fire Safety Officer</a>	<a href="#">Fire Safety Team</a>	<a href="#">Admin</a>
<a href="#">Planned</a>			
<a href="#">In Progress</a>			
<a href="#">Completed</a>	✓*		
<a href="#">Validated</a>	✓**		

- \* Notification is sent to all Fire Safety Officers, except the one who has completed the Assessment

- \*\* Notification is sent to the Fire Safety Officer who completed the Assessment

- \*\* When Validation Failed Action is used notification is sent to the Fire Safety Officer who completed the Assessment

## Action Notification Rule

	<a href="#">Fire Safety Officer</a>	<a href="#">Fire Safety Team – Team leader</a>	<a href="#">Admin</a>
<a href="#">Not Started</a>		✓	

<a href="#">In progress</a>			
<a href="#">Completed</a>		✓	

## Assessment Overdue Notification Rule

### Assessment over due Start

Any notification of impending Assessments is notified to the Fire Safety Officers within 14 days of undertaking the Assessment.

Any delayed or overdue Assessments are still noted to the Fire Safety Officers, this is done on a fortnightly/monthly basis to allow for future off system planning.

## Action Overdue Notification Rule

Any notification of any outstanding or overdue completions is sent to the Responsible Officer on a fortnightly/monthly cycle.

This is in the form of a summary table showing outstanding items for each priority grade.



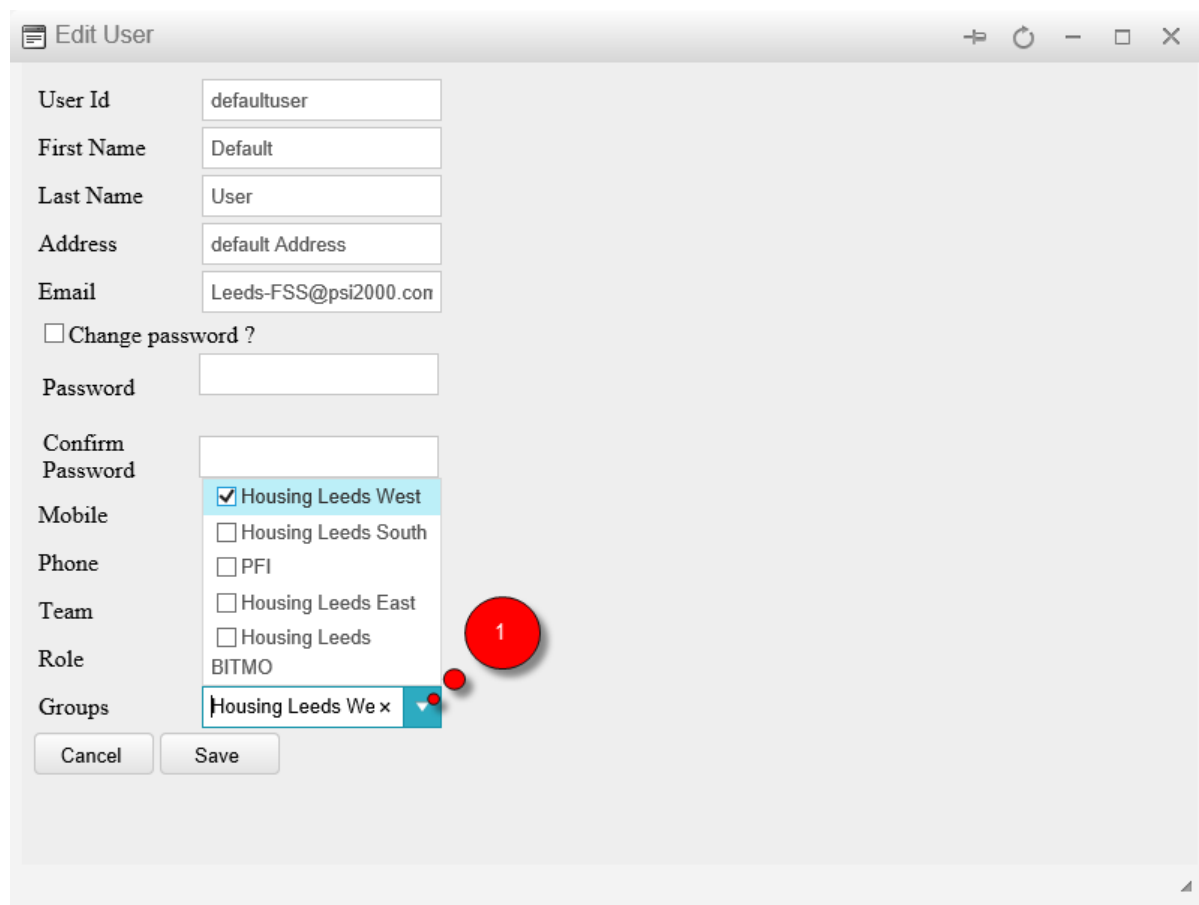
To configure the Notification rule speak with Administrator.

# GROUPS

- The Group information is used when creating Users.
- Group information is obtained from Property Attribute.
- Group information is used to determine which user can have access to which properties;

✿ To change the Group information speak with Administrator.

## Example:



The screenshot shows a web application window titled "Edit User". The form contains the following fields and options:

- User Id: defaultuser
- First Name: Default
- Last Name: User
- Address: default Address
- Email: Leeds-FSS@psi2000.com
- ☐ Change password ?
- Password: (empty field)
- Confirm Password: (empty field)
- Mobile: (empty field)
- Phone: (empty field)
- Team: (empty field)
- Role: BITMO
- Groups: A dropdown menu is open, showing the following options:
  - ☒ Housing Leeds West
  - ☐ Housing Leeds South
  - ☐ PFI
  - ☐ Housing Leeds East
  - ☐ Housing Leeds

At the bottom of the form are two buttons: "Cancel" and "Save". A red circle with the number "1" is positioned next to the dropdown arrow of the "Groups" field.

1. Select relevant Group(s) for a user, then proceed with [Adding or Editing](#) a User

# NEXT ASSESSMENT DATE

---

As soon as the Assessment Date is entered, the Assessment Date for the next assessment is calculated.



The date of the next assessment is configurable. To change the configuration for the next assessment date, speak with the Administrator.

The next assessment date uses the Property Attribute (i.e. Archetype) for calculating the next assessment date. By default the following rule is used:

Archetype	Add Months
Block – High Rise	14
Block – High Rise Sheltered	14
Block – Low Rise	36
Block – Low Rise Sheltered	14
Block – Medium Rise	14
Community Centres	14
Offices	12
Service Buildings	14

# GLOSSARY

---

[ACTION](#)

[ACTION PRIORITY](#)

[ASSESSMENT](#)

[ASSESSMENT SECTION](#)

[ASSESSMENT SECTION QUESTION](#)

[ASSESSMENT TYPE](#)

[COMPLIANCE LEVEL](#)

[PRIORITY](#)

[SIGNIFICANT FINDINGS & DEFECTS](#)

[TEAM](#)

[STATUS](#)

[ROLES](#)

# ACTION

---

Actions are created from identified Significant Findings/Defects during an assessment. Actions are allocated to Teams for Implementation. Each Team has a Team Leader responsible for the implementation of actions. Other examples of attributes of Actions are:

- Estimated Start Date;
- Estimated Completion Date;
- Priority Grade;
- Team;
- Action Completion Date
- Action Completed By

# ACTION PRIORITY

---

The Action Priority is configured to show four grades. They are;

- A Very High Priority – Work to be implemented immediately or within 24 hours
- B High Priority – Work to be completed within 6 months
- C Medium Priority – Work to be completed within 12 months
- D Low Priority – works to be included in Capital Programmes



# ASSESSMENT

---

ASSESSMENT is the process of collecting various information. During this process the Assessment form is used. The assessment form has many sections. For example:

- Property
- Assessment Info
- Support Document
- Occupancy
- Previous Fire Incidents
- Risk Assessment
- Questionnaire. The Questionnaire contains a list of Assessment Sections and Assessment Questions.

# ASSESSMENT SECTION

---

Assessment Questionnaire is made up of a number of sections. The sections are defined in the Assessment Template. Sections represent a list of topics required for assessing during an Assessment.

# ASSESSMENT SECTION QUESTION

---

Assessment Sections are made up of Assessment Section Questions. Each Question represents a potential Significant Finding / Defect and possible recommendation. During the Assessment, the assessor will use the default Questions to collect data about potential Significant Findings/Defects within a Property.

# ASSESSMENT TYPE

---

Assessment Types store information on potential Assessment Sections and Assessment Section Questions. By selecting an Assessment Type, the Fire Safety System can display different Sections and Questions for an Assessor to complete.

# COMPLIANCE LEVEL

---

During an Assessment the assessor uses the Compliance Level to report the status of Significant Findings/ Defects within a Property. Possible options are:

- Compliant
- Non Compliant
- Not Applicable

# PRIORITY

---

The Priority is entered by the Assessor during the Assessment for each Significant Finding / Defect.

# SIGNIFICANT FINDINGS & DEFECTS

---

The Significant Finding/Defect is identified during an Assessment. After validating an Assessment all Significant Findings/Defects are used to create Actions.

# TEAM

---

The Team represents a group of users responsible for the implementation of Assessments and/or Actions.



# STATUS

---

ACTION

ASSESSMENT

# ACTION

---

- [Not Started](#)
- [In Progress](#)
- [Completed](#)

# ACTION – NOT STARTED

---

As soon as an assessment is validated, the information recorded during the assessment for each [Significant Finding and Defect](#) are used to create an Action. The status of all Actions at the time of creation is “Not Started”.

## ACTION – IN PROGRESS

---

For an Action to have a status of “In Progress”, the Fire Safety Team or the Fire Safety Officers have to enter an Action Start Date in the action details page.

# ACTION – COMPLETED

---

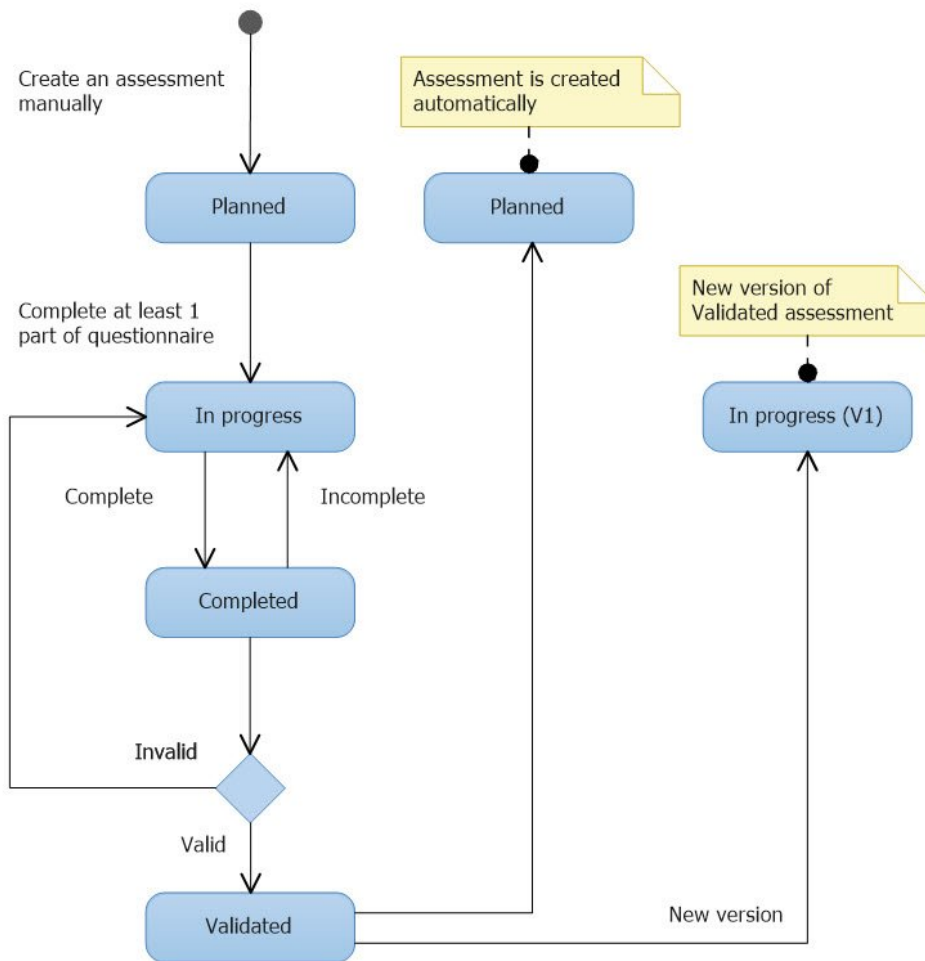
For an Action to have a status of “Completed”, the Fire Safety Team or the Fire Safety Officers select “Completed” from the Action List drop down options or in the Action Detail page.



Fire Safety Officers, also have an ability to complete previously found actions during an assessment.

# ASSESSMENT

- [Planned](#)
- [In Progress](#)
- [Completed](#)
- [Validated](#)



# ASSESSMENT-PLANNED

---

At the time of creation the assessment has “Planned” status. Assessments are created either by the Fire Safety Officer selecting the “New” action or after validating an existing Assessment. On validation of an existing assessment, the system generates the next assessment with the status of “Planned”.



The Date of the Next Assessment is determined by system configuration. To configure this date contact your system Administrator.

# ASSESSMENT-IN PROGRESS

---

As soon as the assessment sections are edited, the assessment status changes to “In Progress”



# ASSESSMENT-COMPLETED

---

An assessment with “In Progress” status is changed to “Completed” when the Fire Safety Officer selects the “Complete” option. For an assessment to have “Completed” status all [Assessment Sections](#) should have been answered by the Fire Safety Officer.

# ASSESSMENT-VALIDATED

---

An assessment has status “Validated” when a Fire Safety Officer selects the “Validate” option.



All assessments with the status of “Validated” can no longer be changed. If there is a changes required, [New Version](#) option should be used.

# ROLES

---

[Admin](#)

[Fire Safety Officer](#)

[Fire Safety Team](#)

# Admin

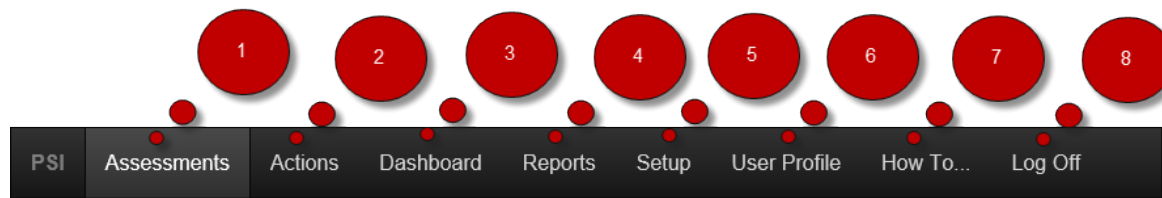
---

[What screens can be accessed.](#)

[What actions are available.](#)

## User Interface – Admin

---



1. Assessments – to access the Assessment List
2. Actions – to access the Action List
3. Dashboard – to access the Dashboard
4. Report – to access the Reports
5. Setup – to access the Setup
6. User Profile – to access the User Profile
7. How To... – to open the FSS Manual
8. Log Off – to log off from the system

# Action – Admin

## Assessment

	<a href="#">Open</a>	<a href="#">Complete</a>	<a href="#">Validate</a>	<a href="#">New Version</a>	<a href="#">Preview</a>	<a href="#">Delete</a>	<a href="#">Incomplete</a>
<a href="#">Planned</a>	✓					✓	
<a href="#">In progress</a>	✓	✓				✓	
<a href="#">Completed</a>	✓*		✓		✓	✓	✓
<a href="#">Validated</a>	✓*			✓	✓	✓	

✿ Assessment with Status “Validated” and “Completed” can only be open for View.

## Action

	<a href="#">Open</a>	<a href="#">Complete</a>	<a href="#">Delete</a>	<a href="#">Incomplete</a>
<a href="#">Not Started</a>	✓		✓	
<a href="#">In progress</a>	✓	✓	✓	
<a href="#">Completed</a>	✓*		✓	✓

✿ Action with Status Completed can only be open for View.

# Fire Safety Officer

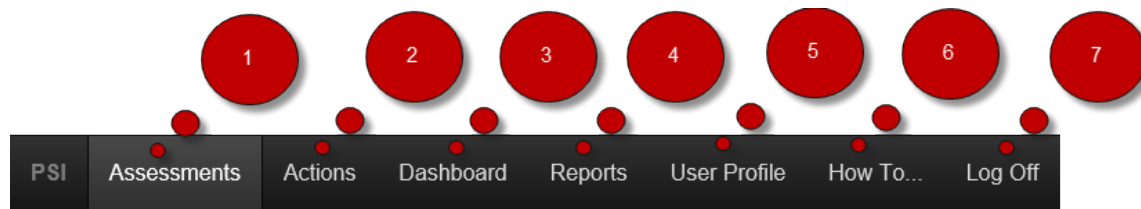
---

[What screens can be accessed.](#)

[What actions are available.](#)

# User Interface – Fire Safety Officer

---



1. Assessments – to access the Assessment List
2. Actions – to access the Action List
3. Dashboard – to access the Dashboard
4. Report – to access the Reports
5. User Profile – to access the User Profile
6. How To... – to open the FSS Manual
7. Log Off – to log off from the system



# Action – Fire Safety Officer

## Assessment

	<a href="#">Open</a>	<a href="#">Complete</a>	<a href="#">Validate</a>	<a href="#">New Version</a>	<a href="#">Preview</a>	<a href="#">Delete</a>	<a href="#">Incomplete</a>
<a href="#">Planned</a>	✓					✓	
<a href="#">In progress</a>	✓	✓				✓	
<a href="#">Completed</a>	✓*		✓		✓	✓	✓
<a href="#">Validated</a>	✓*			✓	✓	✓	

✿ Assessment with Status “Validated” and “Completed” can only be open for View.

## Action

	<a href="#">Open</a>	<a href="#">Complete</a>	<a href="#">Delete</a>	<a href="#">Incomplete</a>
<a href="#">Not Started</a>	✓			
<a href="#">In progress</a>	✓	✓		
<a href="#">Completed</a>	✓*			✓

✿ Action with Status Completed can only be open for View.

# Fire Safety Team

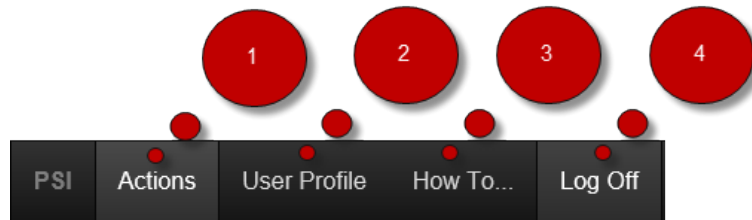
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[What screens can be accessed.](#)

[What actions are available.](#)

# User Interface – Fire Safety Team

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1. Actions – to access the Action List
2. User Profile – to access the User Profile
3. How To... – to open the FSS Manual
4. Log Off – to log off from the system

# Action – Fire Safety Team

## Assessment

	<a href="#">Open</a>	<a href="#">Complete</a>	<a href="#">Validate</a>	<a href="#">New Version</a>	<a href="#">Preview</a>	<a href="#">Delete</a>	<a href="#">Incomplete</a>
<a href="#">Planned</a>							
<a href="#">In progress</a>							
<a href="#">Completed</a>							
<a href="#">Validated</a>							

## Action

	<a href="#">Open</a>	<a href="#">Complete</a>	<a href="#">Delete</a>	<a href="#">Incomplete</a>
<a href="#">Not Started</a>	✓			
<a href="#">In progress</a>	✓	✓		
<a href="#">Completed</a>	✓*			✓



Action with Status Completed can only be open for View.

# USER INTERFACE

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**This sections contains information how to use different types of controls in the application**

# GRID

\* Grid, in the images below is used for example purposes, therefore, the display may be different, however, the functionality is the same

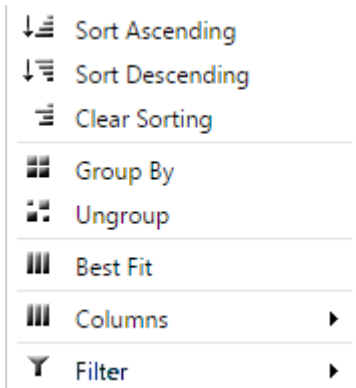
- The “Grid” control is used on many pages.
- The “Grid” displays information in tabular format.
- Each “Grid” has a number of “Columns” and each “Column” has a label.
- Each “Grid” also has ‘Save Grid Layout’ option that allows the user to choose the columns that should be displayed on the page.

\* Please note that not all grid layouts are editable, therefore the Save Grid Layout button is not always available.

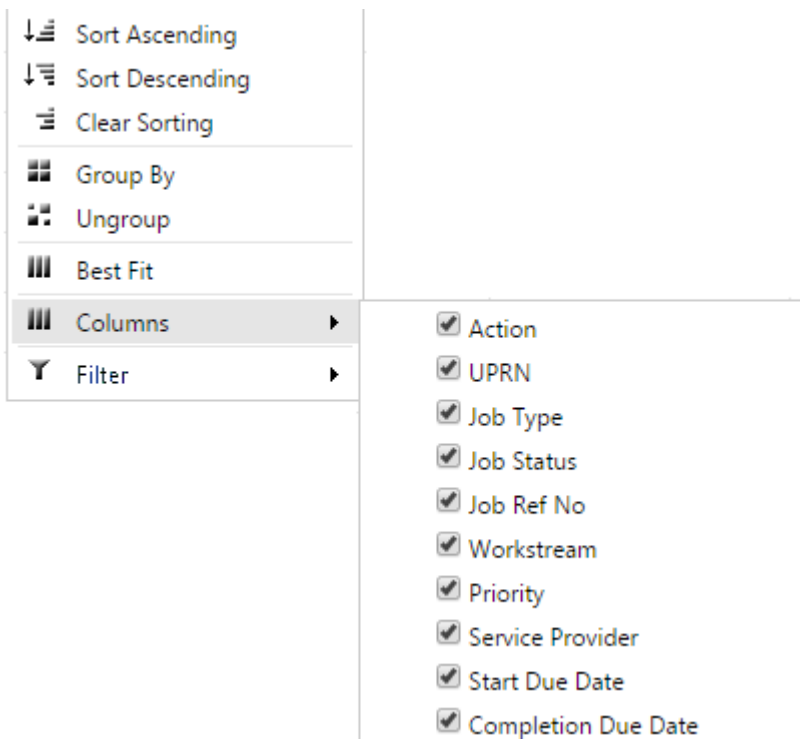
Drag a column header and drop it here to group by that column

New	Bulk Upload	Export to Excel		Clear Filter	Refresh	Save Grid Layout
Action	UPRN	Job Type	Job Status	Job Ref No	Workstream	
--Select Action--	15106	Asbestos Survey	Report Approved	2016-01-26-10540-1	Voids	
--Select Action--	13304	Asbestos Survey	Release Approved	2016-01-25-10539-1	Voids	
--Select Action--	12563	Asbestos Survey	Release Approved	2016-01-22-10538-1	Electrical	
--Select Action--	11981	Asbestos Survey	Release Approved	2016-01-21-10536-1	Voids	
--Select Action--	12503	Asbestos Survey	Release Approved	2016-01-21-10535-1	Voids	
--Select Action--	12434	Asbestos Survey	Release Approved	2016-01-21-10534-1	Voids	
--Select Action--	13335	Asbestos Survey	Release Approved	2016-01-21-10533-1	Voids	
--Select Action--	12008	Asbestos Survey	Release Approved	2016-01-20-10532-1	Voids	
--Select Action--	12464	Asbestos Survey	Release Approved	2016-01-20-10531-1	Voids	
--Select Action--	12840	Asbestos Survey	Release Approved	2016-01-20-10530-1	Voids	
--Select Action--	12181	Asbestos Survey	Release Approved	2016-01-20-10529-1	Voids	

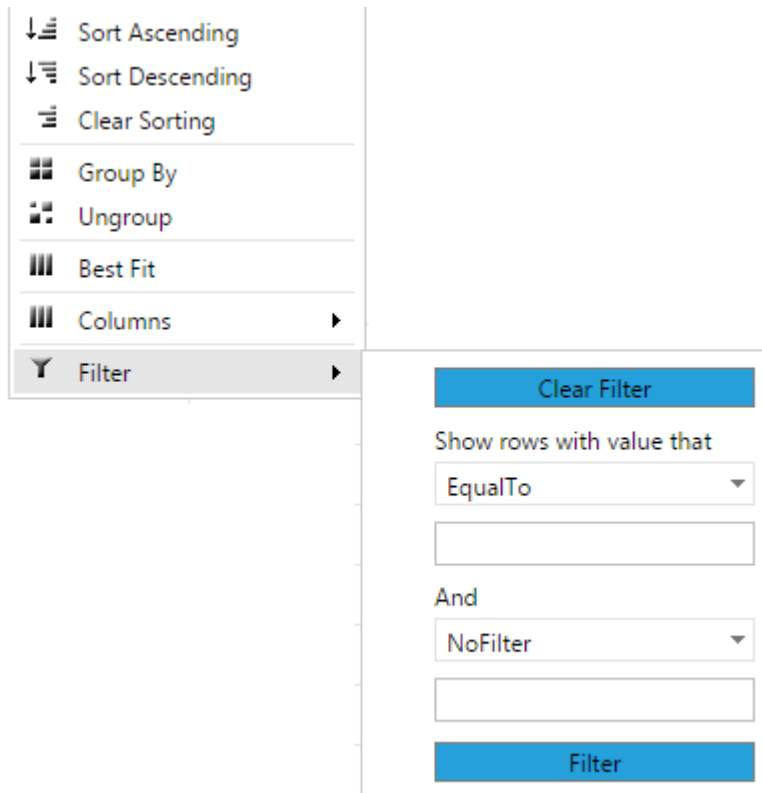
- Click on any of the “Columns” to apply sorting to the data displayed on the “Grid”.
- Place the “mouse” on any of the “Columns” and click on the right key. This will bring up a list of other functions available for the “Grid”.



- Click on the “Columns” to add/remove columns to/from the “Grid”.



- Click on the “Filter” to apply filter to the data displayed on the “Grid”.



- Click on the Group by and the data will be grouped by the column selected.

### Choosing columns to be displayed on the Grid.

Drag a column header and drop it here to group by that column

New Bulk Upload Export to Excel Organisation 1

Clear Filter Refresh Save Grid Layout 4

Action	UPRN	Job Status	Job Ref No	Workstream
--Select Action--	15106	Report Approved	2016-01-26-10540-1	Voids
--Select Action--	13304	Release Approved	2016-01-25-10539-1	Voids
--Select Action--	12563	Release Approved	2016-01-22-10538-1	Electrical
--Select Action--	11850	Pending QC	2016-01-21-10537-11	Responsive
--Select Action--	11863		2016-01-21-10537-12	Responsive
--Select Action--	1485	Asbestos Survey	2016-01-21-10537-15	Responsive
--Select Action--	14565	Asbestos Survey	2016-01-21-10537-22	Voids
--Select Action--	16707	Asbestos Survey	2016-01-21-10537-3	Responsive
--Select Action--	16915	Asbestos Survey	2016-01-21-10537-2	Voids
--Select Action--	17584	Asbestos Survey	2016-01-21-10537-10	Responsive
--Select Action--			2016-01-21-10537-19	Voids

2

- Sort Ascending
- Sort Descending
- Clear Sorting
- Group By
- Ungroup
- Best Fit
- Columns
- Filter

- ☒ Action
- ☒ UPRN
- ☒ Job Type
- ☒ Job Status
- ☒ Job Ref No
- ☒ Workstream
- ☒ Priority
- ☒ Service Provider
- ☒ Start Due Date
- ☒ Completion Due Date

3



To be able to add or remove columns on the grid follow the steps below:

1. Right click on any grid's header. List of options appear.
2. Hover mouse over 'Columns'.
3. Tick the column(s) that you would like to be visible on the grid.
4. Click on 'Save grid layout' button to save the setting.

The grid should display all your selected columns.

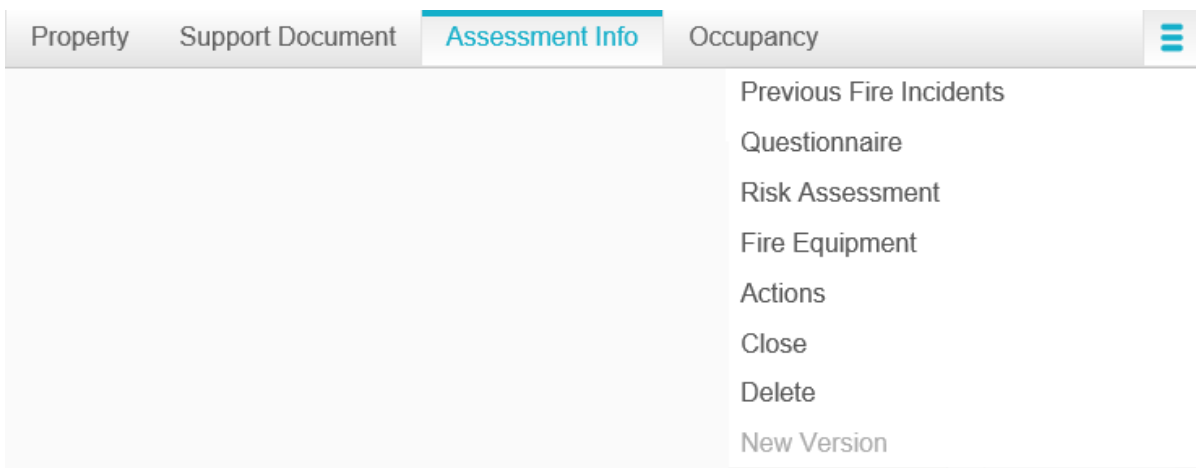
By ticking column(s) can be made visible or by un-ticking can be made invisible.

# MENU

Menu contains tabs that open different types of content



On smaller resolution or with a lot of items the menu will appear with a more button



Sometimes certain functions are disabled and will appear like in the image below

