

# **Transport Back Office**

last updated for the Autumn 2018 release (3.67)

Handbook



## **Revision History**

Version	Published on
Autumn 2018 (3.67) - 1.0	28/09/2018

#### **Doc Ref**

Transport Back Office Handbook/Autumn 2018/2018-09-28

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# **01** | Introduction

## **Overview of One Transport**

One Transport supports the core processes of an LA's transport team, enabling users to manage online parental applications, run assessments, create tickets, make payments, run budget forecasts and manage journeys. Most of One Transport v4's processes can be run either as individual cases or in bulk jobs.

One Transport consists of two different modules: **Transport Back Office**, which is used by transport officers; and **Transport Portal**, the online application form. Transport Portal is accessed via the Citizen Portal, alongside the Free School Meals and Admissions portals. The Citizen Portal uses the Portal Back Office module to manage matching student conflicts. As an optional extra, GIS v4 can be integrated into Transport Back Office to help with measurement and assessment calculations. GIS is a separately purchasable site licence that enables One users to view addresses and schools on a map.

The two Transport products form part of the overall One solution and are fully integrated with the core One database. Transport is a back office product intended to be installed on an intranet rather than accessed from the Internet.

### What's New in this Release?

This handbook was last updated for the One Autumn 2018 release (3.67).

Permission can now be given to users to edit memos within the **Applications** and **Assessments** areas, independently of whether the user can also edit **Applications** and **Assessments** themselves.

## **Using This Handbook**

This handbook is intended for One administrators and users of the Transport area. It is split into seven chapters.

- Processing Transport Applications covers the transport application process.
- Maintaining People covers the creation and administration of person records within Transport and the management of customer communications or complaints.
- Maintaining Routes and Stops covers the administration of route and stop data.
- Managing Contractors and Contracts covers the recording and maintenance of contractor and contract details.
- Using the Actions Menu covers the Actions menu, a contextual drop-down menu comprising a list of useful functions.
- Utilities covers Transport's Address catalogue, Nearest schools, Bulk print, Job manager, RO import, Budget forecast and Reports functions.
- Admin covers Transport's in-built administrator-level tools.

## **Transport Process Overview**

The role of a transport officer working within a Local Authority (LA)'s transport team is to address the transport needs of eligible applicants within that authority.

LAs deliver transport services in diverse ways, depending on the geographic and demographic natures of the areas that they serve. However, all LAs are looking to achieve the same aims in scheduling transport and use similar processes to achieve those aims. One Transport has been designed to reflect those processes and so reflect how transport officers and teams work.

A number of One Transport v4's more common processes can be used with multiple cases simultaneously, as well as with individual cases. This approach helps transport teams to work efficiently, using bulk processing to address "standard" cases while transport officers concentrate on more challenging, individual cases.

This overview highlights the main transport processes.

#### **Application, Assessment and Allocation of Journeys**

The four key processes for a transport team are application, assessment, approval and journey allocation.

**Applications (Processes | Single passenger | Applications)** can be received directly from carers via the **Transport Portal.** Alternatively, they can be entered by transport officers transcribing from paper forms or receiving application details from phone calls.

Assessments determine a candidate's eligibility for transport. To perform an assessment, a candidate's assessment criteria are entered in One Transport's Assessment tab (Processes | Single passenger | Assessments). These are evaluated against a set of pre-defined criteria to determine the candidate's eligibility for transport. Assessments can be run either on an individual basis or for several candidates at once (Processes |Multiple passengers | Perform assessments).

**Approvals** mark an application as accepted, confirming that the authority will provide transport for the candidate who made that application.

**Journey** allocation is based on the evaluation of user-supplied information about the origin and destination of journeys. For users with GIS, One Transport's **Suggest** function can suggest a possible route based on the criteria provided (**Processes | Single passengers |Journeys**). The allocation process can also be performed in bulk, with transport officers choosing a group of candidates to allocate journeys to using selection criteria (**Processes | Multiple passengers |Allocate journey**).

#### **Personal Information**

One Transport evaluates a range of criteria during the assessment process. Some of these criteria pertain to the personal circumstances of the candidate. The **Personal Info** area (**People** | **Personal info**) contains sections on **Personal** details, **Contact Information**, **Education**, **Relationships**, **Status**, **Special Needs** and **Financial** information.

#### **Tickets, Invoices and Payments Out**

Although applications, assessments and journey allocations are common to all transport applications, individual LAs may use different processes to meet transport requirements. In addition, different journey types (such as door-to-door routes for passengers with special needs) may require LAs to use a different assessment and allocation process.

## Some LAs issue journey tickets. Tickets can be issued either individually (Processes | Single Passenger | Tickets) or in bulk (Processes | Multiple Passengers | Issue Ticket).

LAs may decide to sell spare journey capacity to carers. They may also want to bill for other reasons, for example to pay for damage. To do so, the LA needs to issue **Invoices**.

Invoices can be issued either individually (Processes | Single Passenger | Invoices) or in bulk (Processes | Multiple Passengers | Invoice Passengers).

LAs may also wish to pay a carer to provide transport. This usually happens where it is cheaper to pay a carer to provide transport than to organise transport by other means. The **Payments Out** function enables the LA to make these payments.

#### **Routes and Stops**

Some LA s create and maintain routes and stops as a way of delivering transport to passengers. One Transport provides the facility to record these routes and stops.

The **Routes** facility (**Operations | Routes**) records details of the route itself, including its stops, loading information, passengers, staff, route surveys and maps. The **Route Details** section enables transport officers to view the contacts associated with the route and the vehicles used on the route.

The **Stops (Operations | Stops)** facility shows details of the stops themselves, including the numbers boarding and alighting at the stop, the routes using the stop and a representation of the stop on a map.

#### **Contractors, Contracts and Bulk Contract Renewal**

Where an LA uses contractors to supply transport services, One Transport enables the recording and maintenance of contractor and contract details.

All details relating to a **Contractor** (**Details**, **Routes** served, **Vehicles** used, **Checks** and **Payments** made) are recorded under **Operations** | **Contractors**.

**Contracts** are created and maintained in the **Operations | Contracts** section. Contract **Details**, **Costs** and **Payments** are also recorded in this section. A **Bulk Contract Renewal** facility **(Operations | Bulk contract renewal)** enables officers to apply percentage cost changes to contracts in bulk.

#### **Driver and Assistant Information**

The Driver and assistant tab (People | Driver/assistant info) contains details of drivers and assistants who work for either contractors or LAs. This tab enables officers to record information on a driver/assistant's Training, Bases, Routes and Disclosure and Barring Service (DBS) Checks, as well as Role Details

#### **Other Transport Processes**

As well as providing the basic processes that enable an LA to provide a transport service, One Transport also provides a number of other features that make the job of a transport officer easier.

The Bulk transfer process (**Processes** | **Bulk transfer**) enables officers to transfer passengers from one route to another in bulk.

The **Communications and Complaints** tab **(People | Communications & complaints)** allows officers to record details of communications and complaints made about passengers and contractors.

The **Utilities** section provides a number of useful functions, including the **Address Catalogue**. The Address Catalogue provides a central function for address maintenance, not just for One Transport but across One as a whole.

The **Nearest schools** function enables a transport officer to locate up to forty schools that are closest to a given address.

The **Budget** forecast provides forecasts of expenditure by route and budget code, either on an annual summary basis or as a monthly breakdown.

# **02** Processing Transport Applications

The **Processes** area of One Transport enables you to record and meet the transport needs of eligible passengers. This process involves recording applications, running assessments, approving applications, creating journeys and issuing tickets.

As well as these core functions, One Transport enables you to invoice carers who have chosen to buy transport from an LA. There is also a facility to record payments made by an LA to a carer in cases where the carer has agreed to supply a given passenger's transport.

The **Processes** area is split into three pages: **Single passenger**, **Multiple passengers** and **Bulk transfer**.

## **Processing Individual Passengers**

The **Processes | Single passenger** menu enables you to add or edit assessments, applications, journeys, tickets, invoices and payments for an individual passenger.

One Transport's single passenger functions are designed to help you process the transport needs of passengers who cannot be processed using bulk routines. For example, the bulk routines will not process any passengers with special transport needs, as these cases need individual attention. Likewise, you cannot use bulk routines to create an assessment with a different date range to a pre-existing application for the same passenger. Individual passenger routines, however, have fewer restrictions, giving you precise control over the assessments, applications and journeys you create.

Passengers must be selected before they can be processed. Once you have selected a passenger you can view or edit any **Applications**, **Assessments**, **Journeys**, **Tickets**, **Invoices** and **Payments Out** that are associated with that person by selecting the appropriate tabs in the work area and highlighting the desired item.

## **Selecting a Passenger to Process**

The **Single passenger** search panel provides two passenger selection tabs. The **Personal info** tab enables you to search for a specific passenger using that passenger's name or other personal details, while the **Process status** tab enables you to search for passengers based on the stage that those passengers are at in the application process.

If a passenger has a SEN status of S (Statement) or E (EHCP), then the corresponding status letter is displayed before their name in the search results. This enables you to see which people have SEN statements or EHCP plans in place without having to select them.

You can use the Process status tab to search for:

- All active passengers.
- Those passengers with special transport needs.
- Passengers who attend or need to travel to a specific base.
- Passengers who either do or do not have an ongoing application.
- Passengers who either do or do not have an outstanding assessment.
- Passengers who either have or have not been assigned a journey.

**NOTE:** One Transport displays the number of results matching the entered search criteria at the bottom of the search panel. However, Access Control List (ACL) restrictions are applied in between the search being completed and the results being displayed. Therefore, the number of results visible on screen may not match the given number of results, depending on the ACLs applicable to your One user ID. For more information on ACLs in One see the RG\_ACL\_ACL Definition reference guide, available from www.onepublications.com and My Account.

#### **Searching for Passengers by Personal Details**

1. Select the **Processes** area and ensure that the **Single passenger** page and the **Personal info** tab are selected.

Single pass	enger Multiple passengers Bulk t	ransfer
Personal info	Process status	No person selected
Search for	Active people in this authority	
Name	Any name characters	
Person Id	[]	
Postcode	Type Any 👻	Applications Assessments Journeys Tickets Invoices Payments out
Base	Select a base	
Gender	Either •	
UPN	[]	
Date of birth	dd/mm/yyyy	
NCY from	NCY + to NCY +	
	Use contains matching for names [clear]	

- 2. Enter search criteria for the passenger you want to select. You can enter the following criteria:
  - Search For: Enables you to search for Active people in this authority, All people in this authority, Active people in any authority or All people in any authority.

**NOTE:** When searching for **Active people in this authority**, One returns passengers whose **Home LA** number, or the LA number of their correspondence address, matches your authority's LA number.

For more information on defining a passenger's home LA, see <u>Recording Status Details</u> on page 53.

- Name.
- Person Id: A unique reference number that is generated by One when a new person is added to the database.
- Postcode.
- **Base:** Returns those people who travel to or from a specific school.
- Gender.
- UPN.
- Date of Birth.
- NCY range: Use the From and To NCY drop-down menus to specify an NCY range for the search.
- 3. Click the **Search** button to display a list of passengers who match your search criteria.

**NOTE:** Click the **export** hyperlink at the bottom of the list to export the returned search results into a spreadsheet file.

4. Highlight the passenger you want to view to display their details on the right-hand side of the page.

Single passe	nger Multiple passengers Bulk tran	isfer			
Personal info	Process status	B B	De	DB 16 ID 9075659	
Search for	Active people in this authority	10 H	(no ema	il address)	[actions ♥]
	[ clear   show all   hide all ] Search	[Passenger info   Person	nal info   Driver / assistant info ]		
Name	DOB Postcode	-			
A	^	Applications Ass	essments Journeys Tickets	Invoices Payments out	
A	and a first sector with the	Date 🗢	Address	Destination	Status
A					
A	10 C 10 C				
A	Conception of the local division of the loca				
A		[ create new application	delete]		

#### Searching for Passengers by Process Status

- 1. Select the **Processes** area and ensure that the **Single Passenger** page is selected.
- 2. Select the Process Status tab.

Personal infe	Process status		No person s	elected						
Between	10/03/2017 and 10/03/20	17								
Search for	all passengers	•								
n NCY	all NCYs	•	Applications	asessments	-	-	(1990)		ints out	
and from	postcode		Applications	asessments	Journeys	Tickets	Invoices	Paym	sits out	
vho	need to travel to	•								
base	base or school group	٩×								
ind who	do or do not have an application	•								
with status										
nd who	do or do not have an assessment	•								
with status		*								
ind who	do or do not have a journey	•								
which	does or dolls not have any toket									

3. Enter valid dates into the Between fields.

The dates in the **Between** fields act as guillotine dates, enabling you to select passengers who submitted an application, were assessed or had a journey created for them during a specific time frame. For more information on guillotine dates, see the <u>Processing Passengers in Bulk</u> chapter introduction on page *30*.

- 4. Select a group of passengers to search within:
  - a. Select an option from the **Search for** menu. The available options are **all passengers**, **passengers with special transport need** and **passengers without special transport needs**.
  - b. Select an NCY from the in NCY menu.
- 5. Select the passengers' location. You can enter location details in two ways:
  - Enter a postcode into the **and from** field.
  - Select a base from the base browse. If you enter base details, select either need to travel to or attend from the who menu as required.
- 6. Enter an application status:
  - a. Select an option from the application section's and who menu. The available options are do or do not have an application, do have an application and do not have an application. Selecting do or do not have an application means that applications will not be included as part of the search criteria.
  - b. If you selected either do have an application or do not have an application, select an option from the with status menu. The available options are APP-APPROVED, PEND-PENDING and REJ-REJECTED.

- 7. Enter an assessment status:
  - a. Select an option from the assessment section's and who menu. The available options are do or do not have an assessment, do have an assessment, do have an issued assessment and do not have an assessment.
  - b. If you selected either do have an assessment, do have an issued assessment or do not have an assessment, select an assessment status from the with status menu.
- 8. Enter a journey status:
  - a. Select an option from the journey section's and who menu. The available options are do or do not have a journey, do have a journey and do not have a journey.
  - b. If you selected either do have a journey or do not have a journey, select a ticket status from the which menu. The available options are does or does not have a ticket, does have a ticket or does not have a ticket.

**NOTE: Process status** only looks at tickets that are explicitly linked to journeys, and does not return search results for unlinked tickets.

9. Click the **Search** button to display a list of passengers who match your search criteria.

**NOTE:** Click the **export** hyperlink at the bottom of the list to export the returned search results into a spreadsheet file.

10. Highlight the passenger you want to view to display their details on the right-hand side of the page.

Personal info	Process status	D D	DOB 01/ ID	1575
Between	08/10/2014 and 08/10/2014	65	(no email address)	[actions ♥]
Search for	all passengers	[Passenger info   Personal info   Driver / assist	ant info ]	
who	need to travel to 👻	Applications Assessments Journe	rys Tickets Invoices Payments of	ut
	[ clear   show all   hide all ] Search	Date * Address	Destination	Status
Name	Date Of Birth PostCode			
A	THE REPORT OF A DESCRIPTION OF A DESCRIP			
A	^			
A	THE REAL PROPERTY AND			
A	a	[ create new application   delete ]		
A		-		

### **Creating an Application**

Applications can be created by parents and guardians directly from the Citizen Portal. Once One has matched a Citizen Portal transport application to the correct One Transport passenger, the details of that application show up in that passenger's **Applications** tab.

You can also use the **Create New Application** function to record a transport application manually.

- 1. Select a passenger. For more information on selecting a passenger, see <u>Selecting a Passenger</u> to Process on page *4*.
- 2. Ensure that the **Applications** tab is selected.
- 3. Click the **create new application** hyperlink to display editable fields relating to applications.

Name	Date Of Birth	PostCode		
		100.000	~	Between 651 Q and Westfield Middle S Q X Out & return +
Alter in such	Property lies and property lies and	1 March 1998		
and the second second		1000		Every
And and Address of	and the second second	CONTRACTOR OF T		MTWTF SS
State Inc.				✓ Application details
	CONTRACTOR OF TAXABLE PARTY.	10000		• Application details
States - States -	the state of	Contraction of the local division of the loc		Date of application dd/mm/yyyy Memo +
ARE REAL	Property lies and the		10	Origin of application Select origin of application
the state	in the second	1000		
And in case of	-	1.0000010.000		Applicant name
-	a statement of	in succession of the local division of the l		Relationship claimed  with parental responsibility
100 B	and the second s	1.000		
-				Phone number
11.111			111	Email
	transmission .	1 march 1		Address
-	and the second			Address
	100000000			Created By at on
And in case				Last updated by at on
	( and ( states)			
ADDER THE				✓ Other requirements
10. To 10.	A DESCRIPTION OF TAXABLE PARTY.			
	and the second second			Low Income Family status claimed
Alexand and				Disbursement requested
And Distance	1000000000			
And in case				Special transport needs claimed (see below for details)

- 4. Select the requested start address:
  - a. Click the Between browse to display the Choose an address dialog.

				(Contractor of the local data
Looking for	β5 <b></b>		×	Searc
		Address \$		
65				

- b. Enter a postcode or address line into the search bar and then click the **Search** button to display matching addresses.
- c. Highlight an address and then click the **Select this address** button to select the address and close the dialog.
- 5. Select the requested destination base:
  - d. Click the and browse to display the Choose a base dialog.

		Choose	a base		
Looking for					
LEA	All				
Туре	Туре				
Control	Please s	select			
Active	✓				
					[clear] Search
Base N	ame 🜲	School Number	LEA	Bas	е Туре
Abbey Middle S	chool	4001	999	JUN	
Westfield Middl	e School	4033	999	MID	
Showing 1 - 2 (	of 2			<	prev   next >
[view details]				[cance	el ] Select this base

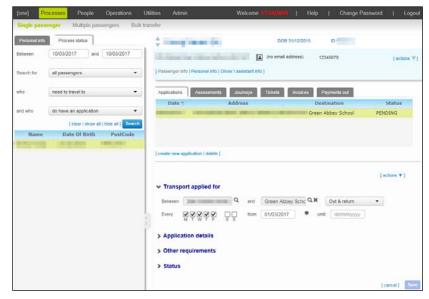
- e. Enter search criteria for the destination address and then click the **Search** button to view a list of matching bases.
- f. Highlight the destination base and then click the **Select this base** button to select the base and close the dialog.
- 6. If required, select a journey type from the **Out & return** menu.
- 7. If required, use the **Every** check boxes to select the days of the week that the student requires transport.
- 8. Enter the requested start and end dates into the from and until fields.
- 9. Enter Date of application, Origin of application, Applicant name, Relationship claimed, Phone, Email and Address details as required.
- 10. If required, select the Low Income Family status claimed, Disbursement requested and/or Special transport needs claimed check boxes.
- 11. If required, click **User defined fields** and provide answers to the questions displayed. These questions are different for each local authority.
- 12. Click the **Save** button to finish recording the application.

NOTE: There are three approval status values for applications: Pending, Approved and Rejected.

The **Pending** value is used by default when an application is first created on the system. Therefore, you should not change this value manually. It is recommended that you set up your own internal codes for approval status, which can then be specified against the **Pending**, **Approved** and **Rejected** external codes.

## Approving or Rejecting an Individual Application

- 1. Select a passenger. For more information on selecting a passenger, see <u>Selecting a Passenger</u> to <u>Process</u> on page *4*.
- 2. Ensure that the Applications tab is selected. A list of that passenger's applications is displayed.
- 3. Highlight the application you want to approve or reject. Editable fields related to that application are displayed.



4. Open the **Status** section and select either **APP-APPROVED** or **REJ-REJECTED** from the dropdown menu.

✓ <u>Status</u>							
PENDING	from	09/10/2014	until	31/07/2016			
[ show full history	of decisions	1					
PEND - PEI 🗸	from	dd/mm/yyyy	until	dd/mm/yyyy	because	comment	Mark

- 5. Enter a from date. This is the date that the status change will take effect.
- 6. If required, enter an end date into the **until** field and a comment into the **because** field.

**NOTE: From** and **Until** dates do not need to correspond to the dates requested on the application. You can approve or reject a sub-period of the application by entering different dates to those requested.

- 7. Click the Mark button to change the application's status.
- 8. Click the **Save** button to save your changes.

**NOTE:** Changing the status of an application may cause a message to be sent to the applicant in the Citizen Portal, in line with the LA's messaging settings. For further information on working with portal messages, see the **Configuring Application Status Notifications** section of the Citizen Portal handbook, available from <u>www.onepublications.com</u> and My Account.

### **Deleting an Application for Transport**

- 1. Select a passenger. For more information on selecting a passenger, see <u>Selecting a Passenger</u> to Process on page *4*.
- 2. Ensure that the **Applications** tab is selected. A list of that passenger's applications is displayed.
- 3. Highlight the application you want to delete.

[one] P	rocesses People	Operations	Utilities Admin	Welcome SYSALMIN	Help   Change	Password   Logout
Single pass	enger Multiple pass	sengers Bulk	transfer			
Personal info	Process status		-	100		
Between	10/03/2017 and	10/03/2017	III Internation Sta	(no email ad	ldress) 12345678	[actions \V]
Search for	all passengers	•	[Passenger info   Persor	nal info   Driver / assistant info ]		
who	need to travel to	•	Applications Asse	essments Journeys Tickets	Invoices Payments out	
			Date 💠	Address	Destination	Status
and who	do have an application	•	c	second of Auril Bridgers & B		PENDING
	[ clear   show all	hide all ] Search				
Name	Date Of Birth	PostCode				
1						
			[ create new application	delete ]		

- 4. Click the **delete** hyperlink. A warning dialog is displayed.
- 5. Click the **delete** button the delete the application and close the dialog.

#### **Creating an Individual Assessment**

- 1. Select a passenger. For more information on selecting a passenger, see <u>Selecting a Passenger</u> to Process on page *4*.
- 2. Select the Assessments tab.
- Click the create new assessment hyperlink to display editable fields related to assessment details.

B	CB			
в	в	👽 Assessment criteria		
В	В	Valid from	dd/mm/yyyy * until dd/mm/yyyy	
B	:B	valid from		
B	3C	Assessment address	36	C Q.*
B	JC	Destination location	St College	Q # *
B	С	Destination criteria		
В	3B	Destination criteria	Nearest site	
В	)B	Alternative criteria	Nearest site	
В	В			[Nearest school search ]
В	)D			[11000000000000000000000000000000000000
B	D		Calculate	
B	BC			
В	BC	Assessment results (	summary)	Memo 🕈
В	:В	Assessment results (	details)	
В	٨B	Assessment results (	details)	
В	3D			
B	)с 🗸			
B	D			
View 1 - 100 of 742	< prev   next >	Entitlement - Selec	t Entitlement - 🔹	[cancel] Save Issue
[ create a new person   export	t]			

If the selected passenger has a pending application, that application's address, destination and date details are copied automatically into the new assessment.

If the selected passenger has more than one pending application the **Which application do you want to assess?** dialog displays. Highlight an application and click **Select** to close the dialog and copy the selected application's details into the assessment. Alternatively, click **cancel** to create a blank assessment.

Select the details you'd like copied into the new assessment           Address         Destination         From         Until           Sharnbrook Upper School         09/10/2014         31/07/2016           Sharnbrook Upper School         06/10/2014         31/07/2016	h application do you want		?
			Until
Sharnbrook Upper School 06/10/2014 31/07/2016	Sharnbrook Upper School	09/10/2014	31/07/2016
	Sharnbrook Upper School	06/10/2014	31/07/2016

- 4. Enter a date into the **Valid from** field.
- 5. If required, enter a date into the **until** field.
- 6. If you need to change the assessment address:
  - a. Click the Assessment address browse to display the Choose an address dialog.

		Choose an address		
Looking for	β5		×	Search
		Address \$		
65	in a belief it			
View 1 - 1 of	1		< 00	ev   next >
	<u>.</u>			
			[cancel] S	

b. Enter a postcode or address line into the search bar and then click the **Search** button to display matching addresses.

#### **Processing Transport Applications**

- c. Highlight an address and then click the **Select this address** button to add the address to the assessment and close the dialog.
- 7. If you need to change the destination location:
  - a. Click the **Destination Location** browse to display the **Choose a base** dialog.

		Choose	a base		
Looking for					
LEA	All				
Туре	Туре				
Control	Please	select			
Active	$\checkmark$				
					[clear] Search
Base	e Name 🔶	School Number	LEA	Ba	ase Type
Abbey Middl	le School	4001	999	JUN	
Westfield Mi	iddle School	4033	999	MID	
Showing 1 -	2 of 2				< prev   next >
[ view details ]				[can	cel] Select this base

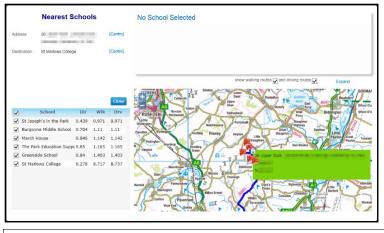
- b. Enter search criteria into the available fields and then click the **Search** button to display matching addresses.
- c. Highlight an address and then click the **Select this base** button to select the address as the destination location and close the dialog.
- 8. Select criteria from the **Destination criteria** and **Alternative criteria** menus as required.

**TIP:** If you want to search for the closest schools using more specific criteria, click the **Nearest school** search hyperlink to display the **Nearest schools** page in a new browser tab/page.

9. Click the **Calculate** button to run the assessment. The assessment results are displayed in the **Assessment results (summary)** and **Assessment results (details)** tabs.

🗸 Assessi	ment results	(summary)			Memo 🕈
	Calculated	Assessed			
Direct	6.278	6.278	miles	Low-income family	
Walking	8.717	8.717	miles 🟶	Catchment	NOT KNOWN
Driving	8.737	8.737	miles	Age-related threshold	3.00 miles
Destination	is 17th nearest s	school		Show calculated nearest sch	ools ]
> Assessi	ment results	(details)			
Entitlement	NELG -	Not Eligible	•		[ cancel ] Save Issue

10. If required, click the Show calculated nearest schoools hyperlink. The Nearest Schools dialog displays, showing the five nearest schools to the selected passenger's address. Select a school's name in the list to highlight that school's location on the map. You can alter the map display using the Show catchment area on map, show walking routes and and driving routes check boxes. When you have finished reviewing the schools, click the Close button to return to the assessment.



**NOTE:** You can only see map data for assessments that have been created in One Transport v4. Assessments created in v3 do not have map data available.

- 11. Select one of the following options:
  - Click the Save button to save the assessment without issuing it.
  - Click the **Issue** button to issue the assessment.
  - Click the cancel hyperlink to discard the assessment.

**NOTE:** To edit the student's assessed entitlement manually, select a new entitlement status from the **Entitlement** menu.

## **Deleting an Assessment**

- 1. Select a passenger. For more information on selecting a passenger, see <u>Selecting a Passenger</u> to <u>Process</u> on page *4*.
- 2. Select the **Assessments** tab to display a list of the student's assessments.

who	need to travel to	•	Applications	Assessments Journeys	Tickets Invoices Payments out		
	[ clear   show	all   hide all ] Search	h	Address	Destination	Start	Issued
Name	Date Of Birth	PostCode	100	a land framework and	Sharnbrook Upper School	09/10/2014	No
Δ	A CONTRACTOR	allowed at the	~				
A		Construction of the local division of the lo					
A		1000 C					
Ą	In Additional State	1.000	[ create new	assessment   delete ]			

- 3. Highlight the assessment you want to delete and then click the **delete** hyperlink. A warning dialog is displayed.
- 4. Click the **Delete** button to delete the assessment and close the dialog.

### **Overlapping Application and Assessment Dates**

One Transport provides controls to help you deal with applications and assessments whose dates overlap.

#### Managing Overlapping Dates When Creating a New Application

When you save a new application for the first time, a new approval status record with a value of **Pending** is created. One Transport then checks for existing assessments that have overlapping dates and the same passenger, address and destination details. If any such assessments are found, One Transport displays a dialog with the option to approve the newly-created application immediately.

In this scenario, the application is approved for the period in which it overlaps with the assessment. For example, assume that the application runs from **01/09/2013 - 31/08/2014**:

- Sub-scenario 1: The assessment runs from 01/09/2013 31/08/2014. In this case, the entire application is approved, as both assessment and application have the same date range
- Sub-scenario 2: The assessment runs from 02/09/2013 31/08/2014. In this case, the application is approved from 02/09/2013 31/08/2014, as this is the date range that overlaps with the assessment.
- Sub-scenario 3: The assessment runs from 01/08/2013 31/12/2013. In this case, the application is approved from 01/09/2013 31/12/2013, as it does not begin until 01/09/2013.
- Sub-scenario 4: The assessment runs from 01/01/2014 31/12/2014. In this case, the application is approved from 01/01/2014 31/08/2014.

Time Sub-scenario one	01/09/2013 	Application approved	31/08/2014 31/08/2014	
Sub-scenario two	02/09/2013	Application approved Assessment	31/08/2014 31/08/2014	
Sub-scenario three	01/09/2013 Application appr 01/08/2013 Assessment	roved 31/12/2013 31/12/2013		
Sub-scenario four		01/01/2014 Applicat	31/08/2014 tion approved →	

Application

The option to approve is only offered when:

- The application is created for the first time.
- There is a single current or future assessment either eligible or issued for the same passenger and with the same destination and address details as the newly-created application, whose details overlap either fully or partially with that application.
- The user has permission to approve applications.

## Managing Overlapping Dates When Marking an Assessment as Eligible or Creating a New Assessment

When you either create a new assessment or change the entitlement status of an assessment from **Non-Eligible** to **Eligible**. One checks for existing applications with overlapping dates and the same passenger, address and destination details. If any such applications are found, One displays a dialog with the option to approve the existing application immediately.

In this scenario, the application is approved for the period in which it overlaps with the assessment. For example, assume that the application runs from **01/09/2013 - 31/08/2014**.

- If the assessment runs from 01/09/2013 31/08/2014, the application is approved for the same dates.
- If the assessment runs from 02/09/2013 31/12/2013, the application is approved for the same dates.
- If the assessment runs from 01/08/2013 31/12/2013, the application is approved from 01/09/2013 31/12/2013.

If the assessment runs from 01/01/2014 - 31/12/2014, the application is approved from 01/01/2014 - 31/08/2014.

The option to approve the existing application is only offered when:

- There is a single application for the same passenger with the same destination and address details as the assessment, whose details overlap either fully or partially with that assessment.
- There is not already an **Approved** period either partial or full for the existing application.
- The user has permission to approve applications

### **Creating a Journey**

In One Transport, journeys are added through the **Journeys** tab. The **Journeys** tab enables you to create mainstream journeys, door-to-door journeys, and journeys using a carer's own transport.

Mainstream journeys are delivered using either standard or network routes. A standard route is a route on which the LA have supplied a "school bus"; that is, employed a contractor to supply vehicles with which to service an LA-specified route.

A network route is an existing commercial, scheduled road or rail route. The LA buys passes to enable transport using these routes.

On a door-to-door route, the LA supplies transport to pick up a passenger at a specific address or stop and then take that passenger to another address or stop.

LAs may decide to sell spare seats to carers. To help with this process, One Transport has the capability to invoice carers for their purchased seats.

If an LA is unable to provide transport to a student at a reasonable cost, it may choose to pay a carer to supply suitable transport. One Transport provides an outgoing payments function to assist with this process.

The first part of the journey creation process is the same no matter what type of journey you are creating. However, the last few fields differ depending on the journey type selected.

- 1. Select a passenger. For more information on selecting a passenger, see <u>Selecting a Passenger</u> to <u>Process</u> on page *4*.
- 2. Select the Journeys tab.
- 3. Click the add new journey hyperlink to display editable fields related to journey details.

#### **Processing Transport Applications**

[one] Pr	rocesses People	Operations	Utilities Adn	nin	Welcome <b>sysadim</b>	n   Help	Chang	ge Password   Logou
Single pass	enger Multiple pas	sengers Bulk t	transfer					
Personal info	Process status		\$ E	1.1	DO	B	ID III	
Between	20/10/2017 and	20/10/2017	1	Sim	shire, 🔝 (no emai	address)		[actions 🖤]
Search for	all passengers	• ]	[ Passenger i	nfo   Personal info   Driver	/ assistant info ]			
who	need to travel to	•	Applications	Assessments	Journeys Tickets	Invoices	Payments out	
and who	do have an application	•	Show	Current & future journeys	• Descrip	ton	E	rom Until
	[ clear   show all	hide all ] Search	Koute	PITWIT 33	Descrip	3011		ond
			Between	I Lower Street, Eggw)	and Test Nurs	<pre># until dd/mi ggest</pre>	n/yyyy us	& return    Mainstream
			Route	route		۵,	Empty Se	eats [Loading]
			Leaving from	stop	<b>Q X</b> @ hh:	mm going to	stop	QX @hh:mm
			Returning fro	m stop	<b>Q X</b> @ hh:	mm back to	stop	QX @hh:mm
			Applied on	dd/mm/yyyy		Cost		per Period -
			Processed or	dd/mm/yyyy		Extra seats	0	
			Entitlement	- Entitlement	reason 🔹			Memo 🕇
iew 1 - 2 of	2	< prev   next >						[cancel] Save

- 4. If required, change the start address for the journey:
  - a. Click the **Between** browse to display the **Choose an address** dialog.

		Choose an address		
Looking for	β5	and states of the	×	Search
		Address *		
65				
View 1 - 1 of	1		< prev   ne	ext >
			[cancel] Select th	is address

- b. Enter a postcode or address line into the search bar and then click the **Search** button to display matching addresses.
- c. Highlight an address and then click the **Select this address** button to select the address and close the dialog.
- 5. If required, change the destination:
  - a. Click the and browse to display the Choose a base dialog.

		Choose	a base		
Looking for					
LEA	All				
Туре	Туре				
Control	Please s	elect			
Active	✓				
					[clear] Search
Base Na	ame 🜲	School Number	LEA	Ba	se Туре
Abbey Middle S	chool	4001	999	JUN	
Westfield Middle	e School	4033	999	MID	
Showing 1 - 2 o	of 2				< prev   next >
[ view details ]				[canc	el] Select this base

- b. Enter search criteria for the student's destination base and then click the **Search** button to view a list of matching bases.
- c. Highlight the required base and then click the **Select this base** button to select the base and close the dialog.
- 6. If required, select a journey type from the **Out & return** drop-down menu.
- 7. Use the every check boxes to select the days of the week that the student requires transport.
- 8. Enter the start and end dates of the journey into the from and until fields.
- 9. If you want to create a journey that uses mainstream transport:
  - a. Ensure that Mainstream is selected from the using menu.
  - b. Click the Suggest button. One analyses the required journey details and populates the Route, Leaving from, going to, Returning from and back to fields with suggested route and stop information. You can edit these fields manually if you do not want to use the suggested route.
- 10. If there are multiple eligible routes, the **Select a Recommendation** dialog displays. Highlight the suggestion you want to use and then click the **Select** button to use that route.

**NOTE:** One can only make journey suggestions if the authority has the licence for GISv4 and the applicable routes, stops and addresses have been geocoded. For more information on geocoding routes and stops see the Geocoding an Address help topic of the One Bases Online Handbook, available from <u>www.onepublications.com</u> and My Account.

- a. If required, enter valid dates into the Applied on and Processed on fields.
- b. For journeys on network routes, enter a **Cost** for the journey.
- c. Select an Entitlement reason for the passenger.
- 11. If you want to create a journey that uses door-to-door transport:
  - a. Select **Door-to-Door** from the **using** menu. Editable fields related to door-to-door journeys are displayed.

Between 1 Lower	Street, Eggw QX an	d Test Nursery	Q.3	Cut & return	1 🔹
every V V V	F S S from	dd/mm/yyyy 🏶	until dd/mm	n/yyyy using	Door-to-door 🔻
Route	route		Q×	[ manage route ]	
Leaving from	address	<b>Q X</b> @ hh:mm	going to	address	QX @ hh:mm
Returning from	address	<b>Q X</b> @ hh:mm	back to	address	QX @ hh:mm
Applied on	dd/mm/yyyy				
Processed on	dd/mm/yyyy	E	xtra seats	0	
Entitlement	Entitlement reason	- •			Memo 🕈
					[ cancel ] Save

b. Select the route you want to use from the Route menu.

If there is no suitable door-to-door route available, create a new door-to-door route:

- i. Click the Route browse to open the Select an existing door-to-door route dialog.
- ii. Click the create new door-to-door route hyperlink. The Create new door-to-door route dialog is displayed.
- iii. Enter a **Code** and a **Description** and then click **OK** to create the route. The new route uses the start and end points specified in the **Between** and **and** fields.
- c. If required, edit the outbound stop, return stop and time details in the Leaving from, going to, Returning from and back to fields:
  - To select an address as the start or end point of the journey, click the appropriate browse button to display the **Choose an address** dialog and then select an address from the list.

	Choose a	in address	
Looking for	21		Search
	Addre	ss ‡	
2	Color can be seen		
View 1 - 1 of	1	< prev   next	>
		[cancel] Select this a	

• To select a stop as the start or end point of the journey, click the appropriate browse button to display the **Choose an address** dialog, then click the **Choose a stop** hyperlink to display the **Choose a stop** dialog. Use the search fields to select a stop from the list.

	Select a	a stop
Description		
Address		
Stop type	All	•
Route type	All	-
Area	All	
Dates	Current	•
		[Clear] Search
De	scription	Туре
green abbey sec	ondary	Base
	F 1	< prev   next >
Showing 1 - 1 of		

- d. If required, enter valid dates into the Applied on and Processed on fields.
- e. Select an Entitlement reason for the passenger.
- 12. If you want to create a journey that uses the passenger's own transport:
  - a. Select **Own Travel** from the **using** menu. Editable fields relating to own travel journeys are displayed.



- b. If required, enter new address details into the Leaving from, going to, returning from and back to fields. By default, these fields are populated with the same address details as the between and and fields further up the page.
- c. Enter a **Driving distance** for the journey. There are two ways you can enter this information:
  - Enter the length of the journey in miles into the **Driving distance** field.
  - If the authority has the GIS v4 licence, and the addresses are geocoded, click the Estimate Distance button. One calculates the journey distance and enters it into the Driving Distance field.
- d. Enter the Mileage rate of the journey in pence per mile.
- e. Click the **recalculate** button. The total cost of each journey is displayed in the **Per journey** field. You can edit the calculated value if required.
- 13. Click the **Save** button to create the journey and save your changes.

## Setting a Journey's Frequency

All journeys in One Transport v4 must have a journey frequency recorded, detailing the days of the week that the journey takes place on.

This information was not mandatory in v3, meaning that some journeys that were created in v3 may not have their days of the week recorded. By default, One Transport assigns the days Monday through to Friday to these journeys during migration, meaning that these journeys have Monday to Friday selected in the **every** field when viewed in v4.

However, One Transport also takes the opening times of the destination base into account to determine whether a journey happens on a particular day. For example, if a migrated journey involves a base that is not open on Fridays, One Transport will assign a Monday-Thursday frequency to the journey.

If a journey in Transport v3 has no journey frequency information and runs with a pattern other than that assigned by One Transport during migration, the journey frequency must be amended manually.

- 1. Select a passenger. For more information on selecting a passenger, see <u>Selecting a Passenger</u> to Process on page *4*.
- 2. Select the Journeys tab.
- 3. Highlight a journey and then select the desired journey frequency using the **every** check boxes.

**NOTE:** You cannot select days that are outside of the frequency defined for the route. For more information on editing route frequency, see <u>Editing a Route</u> on page 85.

A							[actions ¥]
A A A A	10.000 FT 4	Between 2 /		d Bishop's Walth: 01/10/2014 * u Suggest			▼ Mainstream
A	THE OWNER WATCHING TO AN ADDRESS OF	Route	TestRoute-Test Route	9	Q <b>X</b> *	Empty Seats	[Loading]
A		Leaving from	stop	QX @ hh:mm	going to sto	p	<b>Q X @</b> hh:mm
A		Returning from	stop	<b>Q X @</b> hh:mm	back to sto	q	QX @ hh:mm
A	10000	Applied on Processed on	dd/mm/yyyy dd/mm/yyyy	Ex	tra seats	0	
A	Contract of the	Entitlement	STTL - Stat Elig Low In				Memo 🕇
A	and the second second	> Udf					
A	-						[cancel] Save

4. Click the Save button.

## **Duplicating a Journey**

- 1. Select a passenger. For more information on selecting a passenger, see <u>Selecting a Passenger</u> to Process on page *4*.
- 2. Select the **Journeys** tab.
- 3. Highlight the journey you want to duplicate.

Single pass Personal info		Createlle states (17)		
Between	10/03/2017 and 10/03/2017		email address)	[actions 🔻
Search for	all passengers 👻	[Passenger info   Personal info   Driver / assistant info ]		
who	need to travel to 👻		kets Invoices Payments of	ut
and who	do have a journey 👻	Show Current & future journeys 👻		
	[ clear   show all   hide all ] Search	Route MTWTF SS De SYS-R2 00000 00 Siva Base	scription 0	From Until 2/07/2014
Name	Date Of Birth PostCode			

4. Click the duplicate journey hyperlink to display the Select from all available routes dialog.

Code			
Description			
3ase	Schools		Q. <b>X</b>
Гуре	All types		
Area	All areas		•
Dates	All		-
			[ clear ] Searc
Code	Description	Area	Empty seats

- 5. Select the route that you want to duplicate the journey to:
  - a. Enter search criteria for the route that you want to duplicate the journey to and then click the **Search** button.
  - b. Highlight the route you want to use and then click the **Select** button to select the route and close the dialog.
- 6. Edit journey details as required.

**NOTE:** The new journey cannot begin before the route's start date or end after the route's end date.

7. Click the **Save** button to save the route.

#### **Deleting a Journey**

- 1. Select a passenger. For more information on selecting a passenger, see <u>Selecting a Passenger</u> to Process on page *4*.
- 2. Select the **Journeys** tab to view a list of the passenger's journeys.
- 3. Highlight the journey you want to delete.

#### Processing Transport Applications

Between 10/03/2017 and 10/03/2017 and 10/03/2017 Interventional info   Driver / assistant info ]	[ actions ]
Search for all passengers (Passenger info   Personal info   Driver / assistant info ]	
who need to travel to  Applications Assessments Journeys Trickets Invoices Payments out	
and who do have a journey	
Route         MTWTF SS         Description         From           [clear] show all   hide all ]         Search         SYS-R2         occoco co         Siva Base         02/07/2014	Until

- 4. Click the **delete journey** hyperlink. A warning dialog is displayed.
- 5. Click the **Delete** button to delete the journey.

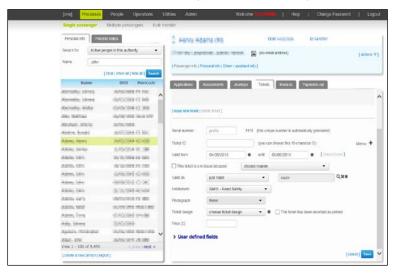
#### **Creating a Ticket**

Tickets in One Transport v4 can be either journey-related or standalone. Journey-related tickets are only valid for a specific passenger journey. Standalone tickets, on the other hand, are valid for a selected route or contractor.

Likewise, passenger journeys can be either ticketed or unticketed. A ticketed journey is a journey that has a linked ticket, while an unticketed journey does not. However, unticketed journeys can still be valid for travel, as the passenger may use a contractor or route-linked ticket. Door-to-door journeys do not usually require a ticket at all.

One Transport automatically assigns ticket serial numbers in order to prevent duplication. However, you can specify a serial number prefix. For example, of you were to specify the prefix "TICKET", One would create tickets with the serial numbers "TICKET1", "TICKET2", and so on. You can also specify a manual ID for the ticket if required.

- 1. Select a passenger. For more information on selecting a passenger, see <u>Selecting a Passenger</u> to <u>Process</u> on page *4*.
- 2. Select the **Tickets** tab.
- 3. Click the **Issue New Ticket** hyperlink to display editable fields related to ticket details.



 If the passenger has one or more journeys, the Which journey do you want to link this ticket to? dialog displays when the Issue New Ticket hyperlink is clicked. Choose one of the following options to proceed:

	Any existing tickets will be unlini	ked from the selected journey		
Source	Address	Destination	From	Until
Mainstream journey		Beeches Special School	09/03/2001	
Mainstream journey		Abbey Middle School	01/05/2001	
Mainstream journey		Shambrook Upper School	01/09/2013	
Mainstream journey		Sharnbrook Upper School	18/12/2013	
Mainstream journey		Sharnbrook Upper School	16/12/2013	
			[ cancel   create a blank tic	ter 1 Conv & Great

- To create a ticket based on a pre-existing journey, highlight that journey and then click the Copy & Create button. One pre-populates the Valid on field with the route used by the selected journey.
- To create a standalone ticket, click the **create a blank ticket** hyperlink.
- 5. If required, enter a serial number prefix into the Serial number field.
- 6. If required, enter a **Ticket ID**. Ticket IDs can be up to 18 characters long.
- 7. Enter Valid from and until dates into the relevant fields.

**NOTE:** To record a ticket that was never valid, enter a date into the **Valid from** field and then enter an earlier date into the **until** field. This function is useful if you need to record tickets that were issued incorrectly or in error.

- 8. If the ticket is a re-issue, select the **This ticket is a re-issue because** check box and select a reason from the **choose reason** menu.
- 9. Select a validity option from the **Valid on** menu. There are three options to choose from:
  - just route: The ticket will only be valid on one specified route. If you select this option a Route browse is displayed next to the Valid on field. Select a route from this browse.
  - all routes operated by: The ticket will only be valid for one specified contractor. If you select this option a Contractor browse displays next to the Valid on field. Select a contractor from this browse.
  - **all routes:** The ticket will be valid for all routes.

**NOTE:** One Transport does not automatically generate new contractor-based tickets if a route's contractor changes.

Contractor-based tickets that are linked to journeys are valid until the End Date of that journey.

- 10. Select the passenger's Entitlement from the menu.
- 11. If required, select the **Photograph** of the child to be displayed on the ticket.
- 12. Select the Ticket Design you want to use.
- 13. Enter a **Price** for the ticket.
- 14. If required, select the This ticket has been recorded as printed check box.
- 15. If required, click the **Send for printing** hyperlink. A printable version of the ticket is displayed in a new browser window.
- 16. Click the Save button.

NOTE: All ticket description fields except until are optional.

## **Printing a Ticket**

- 1. Select a passenger. For more information on selecting a passenger, see <u>Selecting a Passenger</u> to <u>Process</u> on page *4*.
- 2. Select the **Tickets** tab. A list of the selected passenger's tickets is displayed.

who	need to travel to	•	Applications	Assessments	Journeys	Tickets	Invoices	Payments ou	ıt	
	[ clear   show	all   hide all ] Search	Show Cu	urrent & future tickets	•					
Name	Date Of Birth	PostCode	Serial numb	er 🔶 🛛 Ticket ID		Route /	contractor		From	Until
4		^	7	00000015					27/07/1994	
4		~	15	00000023					27/07/1994	
4			22	00000030					28/07/1994	
A										
4			[ issue new tick	et   delete ticket ]						
A										
4 A			Serial number	prefix	7	(this unit	que number is a	utomatically gene	erated)	[actions ¥]
4	1000		Ticket ID	00000015		(vou ca	in choose this 18	-character ID)		Memo 🕂
4						-				
4			Valid from	27/07/1994	*	until	dd/mm/yyyy	*	[Cancel ticket]	
4			This ticket i	is a re-issue because	choose	reason				
4			Valid on	all routes						
A			Entitlement	entitlement cod	e					
4		1. The	Ticket design	report load faile	d	1	F 🗹 This tic	ket has been rec	orded as printed	
4			Price (£)	0						
4			This ticket was	not created from an asso	ciated journey					
4										
4			[ send for printir	ng] (Opens in a new brow	wser tab)					[ cancel ] Save

3. Highlight the ticket you want to print and then click the **send for printing** hyperlink. A printable version of the ticket is displayed in the report viewer.

🍊 🖈 🖆 🕅 Find 🕅 🗅 🍋 1 of 1	• 100% •	SAP CRYSTAL REPORTS*
Group Tree	t	
	A	
	Anywhere LEA	
	County Hall	
	Main Street	
	Anywhere	
	fao Parent / Guardian of	
	N	
	29/08/2014	
	Issue of Bus Pass	
	Issue of bus Pass	
	I have pleasure in issuing the pass requested for N	
	The pass is number 34, Issue date 26/08/2014 and Expiry date 31/08/2014.	
	We have received payment for the pass which can be used on the route between home and school.	
	Yours sincerely	
	Transport Coordinator	
	Pass Number: 34	
	Student: N	
	Issue Date: 26/08/2014	
	Expiry Date: 31/08/2014	

4. Click the printer icon to print the ticket. An entry is made in the entity history to show that the ticket was printed.

## **Deleting a Ticket**

- 1. Select a passenger. For more information on selecting a passenger, see <u>Selecting a Passenger</u> to Process on page *4*.
- 2. Select the **Tickets** tab.
- 3. Highlight the ticket you want to delete.

[one] Pi	rocesses People Operatio	ins Utilities	Admin	N	elcome <mark>SYSADMIN</mark>	l   Help	Change Password	Logout
Single pass	enger Multiple passengers	Bulk transfer						
Personal info	Process status	×		<b>,</b> ,,			ID 1106	
Between	10/03/2017 and 10/03/20	17		internet in	(no email	address)		[actions ₩]
Search for	all passengers	• [Pi	issenger info   Per	rsonal info   Driver / as	sistant info ]			
who	need to travel to	▼ A		ssessments Jou	meys Tickets	Invoices F	Payments out	
and who	do have a journey	· .	erial number 🗢	Ticket ID	Route / c	ontractor	From	Until
	[ clear   show all   hide all ]			0000025			28/07/1994	
Name	Date Of Birth PostCod	^						
		[ is:	sue new ticket   de	lete ticket ]				

- 4. Click the **delete ticket** hyperlink. A warning dialog is displayed.
- 5. Click the Delete button to delete the ticket.

### **Invoicing a Passenger**

One Transport uses the same numbering scheme for invoices as for tickets, automatically assigning serial numbers but enabling you to specify a serial number prefix and manual ID if required.

- 1. Select a passenger. For more information on selecting a passenger, see <u>Selecting a Passenger</u> to Process on page *4*.
- 2. Select the **Invoices** tab to display a list of invoices that have been created for the passenger.
- 3. Click the create new invoice hyperlink to display editable fields relating to invoice details.

who	need to travel to	• )	Applications Ass	sessments Journeys	Tickets	Invoices	Payments out	
	[ clear   show	all   hide all ] Search	Serial number 🛊	Invoice ID	Issued of	on Reason		Amount
Name	Date Of Birth	PostCode	46	011		Invoice for 1	1995/1996	25.00
A	and the second second							
A	And Address of A							
A								
Α	10.000		[ create new invoice ]	delete invoice ]				
A	and the second sec	55-10 Med						
A			Serial number	prefix 676	(this uniqu	e number is autom	atically generated)	
A	10000		Invoice ID	Invoice ID		(vou can choose th	his 18-character ID)	Memo 🛨
A			INVOLUCIES	( intoide its		God can choose a	in to characteries	incite -
A	-	10 Mar 10						
A	-	-	Invoice issued on	05/11/2014	<ul> <li>and due f</li> </ul>	or payment on	05/11/2014	)*
A	in the second second	100	Covering period from	dd/mm/yyyy	* until	dd/mm/yyyy	*	
A	1000	1. C	Cancelled on	dd/mm/yyyy	because	Nothing selecte		
A	-	-	Cancelled on	QOULININÀÀÀÀ	because		.u	
A	1.4							
A			Reason for invoice			🖌 🗹 Adi	dress to carer with fina	ancial responsibility
A	and the second second	-	Route			QX		
A			Amount		pounds)		Budget code	
A		10.00	Amount	<b> T</b>	pounds)		Budget code	
A	and the second second	A 10 10						
A		-	Received amount	(pou	nds) on	dd/mm/yyyy	for reason	
A	IN TRACTORY COMPANY							
A	in the second							[ cancel ] Save

- 4. If required, enter a Serial number prefix field and Invoice ID.
- 5. Enter Invoice issued on and due for payment on details as required.

**NOTE:** You can configure the **Serial Number** field's default value. For more information on configuring default values for invoices, see <u>Configuring Default Invoice Settings</u> on page 138.

- 6. Enter valid dates into the Covering period from and until fields.
- 7. If the invoice has been cancelled, check the **Cancelled on** box. Enter a cancellation date and select a reason from the **because** menu.
- 8. Select an invoice reason from the **Reason for invoice** drop-down menu.
- 9. If required, select the Address to carer with financial responsibility check box.
- 10. If applicable, select the route associated with the invoice:
  - a. Click the **Route** browse to display the **Select from all available routes** dialog.

Schools All types All areas	Q.X.
All types	
All types	
All areas	
All	
	[clear] Sourc
Description	Area Empty seats
w .	< prev   next >

- b. Enter route search criteria and then click the **Search** button to display a list of matching routes
- c. Highlight a route and then click the **Select** button to select the route and close the dialog.
- 11. Enter an **Amount** (in pounds).
- 12. If required, select a **Budget code**.
- 13. Click the Save button.

### **Recording an Invoice Payment**

- 1. Select a passenger. For more information on selecting a passenger, see <u>Selecting a Passenger</u> to Process on page *4*.
- 2. Select the **Invoices** tab. A list of the passenger's current invoices is displayed.
- 3. Highlight the invoice you want to record payment for. Editable fields relating to that invoice are displayed.

Marine women	strike with the					
All	Concernance of the local division of the loc	Serial number	prefix 680 (this uniq	ue number is auton	matically generated)	[actions ¥ ]
A		1.000000	Invoice ID			
All BURGER	and the second s	Invoice ID	Invoice IU	(you can choose	this 18-character ID)	Mema 🕇
A	Contraction of the					
A	and the second s	Invoice issued on	05/11/2014 * and due	for payment on	05/11/2014	*
Appendix	and some					
A	100,000	Covering period from	02/11/2014 * until	03/11/2014	*	
Allena	Concernance -	Cancelled on	dd/mm/yyyy because	Nothing saled	ind .	
A	Contraction of the local distance of the loc	10000000000				
Alternative second	100010000					
A		Reason for invoice	Invoice for 2001/2002	₩ 🗹 A	ddress to carer with fi	nancial responsibility
Allena	CONTRACTOR OF AN	Route	(	0.8		
A	and the loss man	1000				
ASSESSMENT	CONTRACTOR CONTRACTOR	Amount	1 (pounds)		Budget code	
Am	and the second se					
A	Concession of the local division of the loca	Received amount	(pounds) on	dd/mm/yyyy	for reason	
Assess	Concession in the local division of the loca	and a second second second	(bosies)	111	100 100 1011	
A	Contraction of the local division of the loc					
Am	Contraction and the local division of the lo	[ send for printing ]				[concel] Seve

- 4. Enter the payment amount (in pounds) into the Received amount field.
- 5. Enter the payment date into the **On** field.

- 6. Select a payment reason from the for reason menu.
- 7. Click the Save button.

#### **Deleting an Invoice**

- 1. Select a passenger. For more information on selecting a passenger, see <u>Selecting a Passenger</u> to <u>Process</u> on page *4*.
- 2. Select the **Invoices** tab. A list of the passenger's current invoices is displayed.

Personal info	Process status	Je Je		DOB 15/	ID 2634	
Between	08/10/2014 and 08/10/2014	122 1		(no email address)	02:	[actions ♥]
Search for	all passengers	[Passenger info   Per	sonal info   Driver / assistant ir	nfo]		
who	need to travel to 🔹	Applications A:	ssessments Journeys	Tickets Invoices	Payments out	
	[ clear   show all   hide all ] Search	Serial number 💠	Invoice ID	Issued on Reason	6	Amount
Name	Date Of Birth PostCode	45	010	Invoice	or 1995/1996	25.00
A	_					
A						
A	Coloradore (All Call	[ create new invoice ]	delete invoice ]			

- 3. Highlight the invoice you want to delete and click the **delete invoice** hyperlink. A confirmation dialog is displayed.
- 4. Click the **Delete** button to delete the invoice.

#### **Creating a Passenger Payment**

- 1. Select a passenger. For more information on selecting a passenger, see <u>Selecting a Passenger</u> to Process on page *4*.
- 2. Select the **Payments out** tab. A list of payments that have been made to the passenger is displayed.
- 3. Click the **add new payment** hyperlink. Editable fields related to payment details are displayed.

#### **Processing Transport Applications**

who	need to travel to	• ]	Applications A	ssessments Jo	urneys Tickets	Invoices	Payments out	
	[clear show	all   hide all ] Search	Date of payment	Period from	Until		Amount	
Name	Date Of Birth	PostCode						
ρ	1.000	_						
A		-						
β	1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 -	ALCONT. MAL						
A	1.000	panet data	[add new payment]	delete payment				
Δ			<i>Φ</i>					
A			For journey			Q×		
Α			Or other reason					Memo 🕇
Δ	1.000	The second se	or other reason					memo -
Α Δ	1	1000 100						
Δ			Serial number	3	(this unique num	ber is automatically	generated)	
A		No. of Concession, Name	Payment ID			you can choose this		
Δ			Payment ID			you can choose the	s to-character (D)	
۵	1000000000	Report of						
A	-		Entered on	05/11/2014	* Due on	05/11/2014	* Paid on dd/mr	n/yyyy
A		14 M	Period from	dd/mm/yyyy	* until	dd/mm/yyyy	*	
A	Contraction (1998)	Renal terr			* unui	Gavuunsyyyy		
Α	A 10 1000	Same day	Cancelled on	dd/mm/yyyy	because		Ψ.	
Д		and the						
A	in a state		Amount [calculate]	* (poun	ds) Payee Sel	ect a person	QX* Budget code	- *
Д				(P980		2012/07/27/2		
A								<u> </u>
A A								[cancel] Save

- 4. Select a reason for the payment. You can select payment reasons in two ways:
  - Select a journey to make the payment for:
    - i. Click the For journey browse to display the Select a Journey dialog.

Select a Journey									
Description	From	Until							
	10	lose ] Select							

- ii. Highlight the journey you want to make the payment for.
- iii. Click the **Select** button to select the journey and close the dialog.
- Enter a reason description into the **Or other reason** field.
- 5. If required, enter a **Payment ID**.
- 6. Enter valid dates into the Entered on, Due on, Paid on, Period from and until fields.
- 7. Enter an **Amount** (in pounds).

- 8. Select a Payee:
  - a. Click the Payee browse to display the Select a Carer dialog.

	Select a ca	Select a carer						
Name 💠	Gender	Relationship	Parental	Financial				
	S	≥lf	N	N				
		[ ca	ancel ] [ Search a	Il people ] St				

- b. Highlight the carer you want to make the payment to.
- c. Click the Select button to select the payee and close the dialog.
- 9. To search for people who are not carers, click the **Search all people** hyperlink to open the **Select a Person** dialog.
- 10. If required, select a Budget code for the payment.
- 11. Click the Save button to save the payment.

#### **Cancelling a Passenger Payment**

- 1. Select a passenger. For more information on selecting a passenger, see <u>Selecting a Passenger</u> to Process on page *4*.
- 2. Select the **Payments out** tab. A list of payments that have been made to that passenger is displayed.
- 3. Highlight the payment you want to cancel. Editable fields related to that payment are displayed.
- 4. Click the Cancelled on check box

who	need to travel to	•	Applications	Assessments	Journeys	Tickets In	voices Pa	yments out	
	[ clear   show a	II   hide all ] Search	Date of paym	ent Period	l from	Until	Am	ount	
Name	Date Of Birth	PostCode		03/11/	2014	05/11/2014	10		
A	1000								
A		^							
A									
A	10000		[ add new paymer	nt   delete paymen	t]				
A									
A			For journey				Q. <b>X</b>		[actions V]
A									
A			Or other reason	Test					Memo 🕂
A									
A			Serial number	4	(this I	inique number is au	tomatically gener	ated)	
A			Condinianipor		(4110 0		contractionly gonion	atouy	
A			Payment ID			(you can	choose this 18-cl	haracter ID)	
A									
A			- · · ·	05/11/201	4 *	D 00/44	1/2014 *	<b>D</b> 11	l/mm/yyyy
			Entered on	05/11/201		Due on 06/11		Paid on do	иттиуууу
A			Period from	03/11/201	4 *	until 05/11	1/2014 *		
A			Cancelled or	dd/mm/yy	/y	because Nothi	ing selected	<b>.</b>	
A									
A									
A		10 C 10	Amount [calculate	10 *	(pounds) Pa	yee SL	Q	Budget code	Allowances 🔻 🕷
A									
A									[cancel] Save

- 5. If required, add a cancellation date into the field next to the **Cancelled on** check box and select a cancellation reason from the **because** menu.
- 6. Click the **Save** button to cancel the payment.

NOTE: You cannot cancel a payment that has a completed Paid on field.

# **Deleting a Passenger Payment**

- 1. Select a passenger. For more information on selecting a passenger, see <u>Selecting a Passenger</u> to <u>Process</u> on page *4*.
- 2. Select the **Payments out** tab. A list of payments that have been made to that passenger is displayed.

[one] Pr	ocesses People Op	erations Utilitie	es Admin	Welcome	SYSADWIN	Help   C	hange Password	Logout
Single pass	enger Multiple passenge	ers Bulk transf	er					
Personal info	Process status		F	and the second				
Between	10/03/2017 and 10/	03/2017		00002	(no email address)			[actions \V]
Search for	all passengers	•	Passenger info   Perso	nal info   Driver / assistant in	fo]			
who	need to travel to	•	Applications Ass	essments Journeys	Tickets Invoice	s Payments	out	
			Date of payment	Period from	Until	Amount		
and who	do have a journey	•		11/03/2017	11/03/2017	10		
	[ clear   show all   hide	all ] Search						
Name	Date Of Birth Pos	stCode						
		<b>^</b>	add new payment   de	ete payment ]				

- 3. Highlight the payment you want to delete and then click the **delete payment** hyperlink. A confirmation dialog is displayed.
- 4. Click the **Delete** button to delete the payment.

# **Processing Passengers in Bulk**

The **Multiple passengers** page enables you to perform assessments, approve applications, allocate journeys, issue tickets and invoice passengers in bulk. One Transport v4 enables you to use bulk routines to process as many applications as possible before using the single passenger routines to process any outstanding applications.

Most bulk processes in One Transport require you to specify guillotine dates. These dates enable you to select a group of applications to take forward to the next stage of the process, or bulk create future journeys without affecting any existing journeys.

For example, suppose that you specify dates between 1<sup>st</sup> January and 31<sup>st</sup> March on the **Issue tickets** tab, and do not specify any further search criteria. In this instance, One takes all journeys occurring between these two dates and generates tickets for them. Likewise, the **Allocate journey** tab takes approvals dated between the guillotine dates you specify and generates journeys from them, while the **Approve applications** tab generates approvals from applications using the same principle.

One Transport's bulk processes also offer additional selection criteria, enabling you to process specific groups of passengers. For example, all One Transport bulk processes enable you to select students by National Curriculum Year (NCY), helping you to deal with transport applications one year group at a time.

Bulk processes with a lot of data to process can take a significant length of time to run. LAs should experiment with timings in running bulk jobs, and run bulk processes overnight or at weekends if necessary.

# **Creating Assessments in Bulk**

One Transport enables you to select students to assess in three different ways:

- By school.
- By application.
- By admissions transfer group.

When bulk assessing by school, One Transport only assesses for the main, registered school of the affected passengers. Bulk assessments by application and transfer group enable you to assess for any school.

The bulk assessment process will only assess passengers for whom the correct home LA has been defined. For more information on defining a passenger's home LA, see <u>Recording Status</u> <u>Details</u> on page 53.

Performing Bulk Assessments by Admissions Transfer Group

- 1. Select the **Processes** area and select the **Multiple passengers** page.
- 2. Ensure that the **Perform assessments** tab is selected.
- 3. Select Admissions with preferences from the Perform assessments for menu.

[one] Processes People Operations Utilities	Admin Welcome SY SADDINI   Help   Change Password   Logout
Single passenger Multiple passengers Bulk transfer	
Perform assessments Approve applications Allocate journeys	Issue tickets Invoice passengers
Perform assessments for Admissions with preferences	✓ Accepted
Schools All schools	Q.¥
Use this criteria for the destination Nearest site	and this criteria for the alternatives     Nearest site
Assessments will run from 10/03/2017 (or take start date from scho	vol) and will end on dd/mm/yyyy
Create new assessments where none exist for the above date range	but don't alter existing assessments
	[clear   preview ] Start process

- 4. Select whether you want to assess by **Accepted**, **Allocated**, **Offered** or **Provisional** preferences from the drop-down menu. You can select multiple options simultaneously.
- 5. Select an admissions transfer group:
  - a. Click the **admissions transfer group** browse to display the **Choose a transfer group** dialog.

Looking for	Transfer group			
	( Handler group			
				[clear] Search
		Transfer group	i i	

- b. Enter the name of the transfer group and then click the **Search** button to display a list of matching groups.
- c. Highlight a group and then click the **Select this group** button to select that group and close the dialog.

- 6. If required, select a sub group of the selected admissions transfer group:
  - a. Click the **sub-group** browse to display the **Choose a sub-group** dialog.

	Choose a sub-group	
Looking for	Sub-group	
		[clear] Search
	Sub-group	
Subgro	up 1- Other LA OAA	
Subgro	up 2 - Other LA Non OAA	
Online Added	School	
Online Added	School	
View 1 - 4 of	4	< prev   next >
		[cancel] Select this sub-group

- b. Highlight a sub-group and click the **Select this sub-group** button to select the sub-group and close the dialog.
- 7. If required, select a school to perform assessments for:
  - a. Click the Schools browse to display the Choose a base dialog.

		Choose	a base		
Looking for					
LEA	All				
Туре	Туре				
Control	- Please	select			
Active	✓				
				[ c	lear ] Search
Base I	Name 💠	School Number	LEA	Base Ty	pe
Abbey Middle	School	4001	999	JUN	
Westfield Midd	dle School	4033	999	MID	
Showing 1 - 2	of 2			< prev	/   next >
[ view details ]				[cancel]	elect this base

- b. Enter search criteria and then click the **Search** button to view a list of matching bases.
- c. Highlight the desired base and then click the **Select this base** button to select the base and close the dialog.
- 8. Select an option from the **Use this criteria for the destination** and **And this criteria for the alternatives** drop-down menus. These menus determine which of the selected base's gates or sites will be used when measuring distance in the assessment.
- 9. If required, enter start and end dates for the assessments into the **Assessments will run from** and **will end on** fields.
- 10. Select how existing assessments should be treated from the **Create new assessments where none exist** menu.
- 11. Click the Start process button to display the Bulk assessment started page.



12. Click the **Return To Bulk Allocation** button to return to the **Processes | Multiple passengers | Perform assessments** page. Alternatively, click the **Show bulk assessment status** hyperlink to view the assessment job in the Job Manager.

## **Performing Bulk Assessments by Application**

- 1. Select the **Processes** area and select the **Multiple passengers** page.
- 2. Ensure that the **Perform assessments** tab is selected.
- 3. Select Applications with pending periods from the Perform assessments for menu.

[one] Processe	s People	Operations	Utilities /	Admin	Welcome	SYSADMIN	Help		Change Password	1	Logout
Single passenger	Multiple pa	ssengers B	ulk transfer								
Perform assessments	Approve ap	plications Allo	cate journeys	Issue tickets	Invoice passengers						
Perform assessments	or Appl	ications with pendi	ng periods 🔹 🔻	· between	dd/mm/yyyy and	d dd/mm/y	луу				
Schools	All s	chools		Q. <b>X</b>							
						Ignore app	lications wher	e LIF is clai	imed but none is on file	✓	
Use this criteria for the	destination	Nearest site	Ŧ	and this	criteria for the alternatives	Neares	st site		•		
Assessments will run b	etween the dates of	on the relevant appli	cation, or between	the above two dat	es if they are more restricti	ive.					
Create new assessment	ts where none exi	st for the above date	e range	but don't alter ex	kisting assessments		•				
									Eclear Loreview	1 Start	process

- 4. Enter valid dates into the between and and fields.
- 5. If required, select a school to perform assessments for:
  - a. Click the Schools browse to display the Choose a base dialog.

		Choose	a base	
Looking for				
LEA	All			
Туре	Туре			
Control	- Please	select		
Active	✓			
				[clear] Search
Base N	lame 💠	School Number	LEA	Base Type
Abbey Middle	School	4001	999	JUN
Westfield Midd	lle School	4033	999	MID
Showing 1 - 2	of 2			< prev   next >
[ view details ]				[cancel] Select this base

- b. Enter search criteria and then click the **Search** button to view a list of matching bases.
- c. Highlight the desired base and then click the **Select this base** button to select the base and close the browse.
- 6. Select an option from the **Use this criteria for the destination** and **this criteria for the alternatives** drop-down menus. These menus determine which of the selected base's gates or sites will be used when measuring distance in the assessment.
- 7. Select the way that existing assessments should be treated from the **Create new assessments** where none exist menu.
- 8. Click the **Start process** button to begin the assessment process and display the **Bulk assessment started** page.

Perform assessments Approve applications Allocate journey Issue tickets Invoice passengers
Bulk assessment started
The bulk assessment has been submitted and is running in the background.
Show bulk assessment status ] Return To BulkAllocation

 Click the Return To BulkAllocation button to return to the Processes | Multiple passengers | Perform assessments page. Alternatively, click the Show bulk assessment status hyperlink to view the assessment job in the Job Manager.

Performing Bulk Assessments by School

- 1. Select the **Processes** area and select the **Multiple Passengers** page.
- 2. Ensure that the **Perform Assessments** tab is selected.
- 3. Select Students in NCYs from the Perform assessments for menu.

Perform assessments App	rove applications Allocate journey Issue tickets Invoice passengers	
Perform assessments for	Students in NCYs   from NCY  to NCY	
Schools	All schools QX	
Use this criteria for the destination	Nearest site   and this criteria for the alternatives Nearest site	
Assessments will run from	09/10/2014 (or take start date from school) and will end on dd/mm/yyyy	
Create new assessments where n	one exist for the above date range but don't alter existing assessments	
		[ clear   preview ] Start process

- 4. Use the from and to menus to select the range of NCYs you want to perform assessments on.
- 5. If required, select a school to perform assessments for:
  - a. Click the Schools browse to display the Choose a base dialog.

		Choose	a base		
Looking for					
LEA	All				
Туре	Туре				
Control Please select					
Active	$\checkmark$				
				L.	lear ] Search
Base N	lame 🔶	School Number	LEA	Base Ty	/pe
Abbey Middle S	School	4001	999	JUN	
Westfield Midd	le School	4033	999	MID	
Showing 1 - 2	of 2			< pre	v   next >
[ view details ]				[cancel]	Select this base

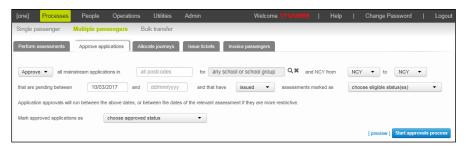
- b. Enter search criteria and then click the **Search** button to view a list of matching bases.
- c. Highlight the desired base and then click the **Select this base** button to select the base and close the browse.
- Select an option from the Use this criteria for the destination and this criteria for the alternatives drop-down menus. These menus determine which of the selected base's gates or sites will be used when measuring distance in the assessment.
- 7. If required, enter start and end dates for the assessments into the **Assessments will run from** and **will end on** fields.
- 8. Select how existing assessments should be treated from the **Create new assessments where none exist** menu.
- 9. Click the Start process button to display the Bulk assessment started page.



10. Click the **Return To BulkAllocation** button to return to the **Processes | Multiple passengers | Perform assessments** page. Alternatively, click the **Show bulk assessment status** hyperlink to view the assessment job in the Job Manager.

# **Approving or Rejecting Applications in Bulk**

- 1. Select the **Processes** Area and select the **Multiple passengers** page.
- 2. Select the Approve applications tab.



- 3. Choose whether you want to **Approve** or **Reject** applications by selecting the appropriate option from the drop-down menu.
- 4. Enter the **Postcode** you want to process applications for.
- 5. Select a school to process applications for:
  - a. Click the any school or school group browse to display the Choose a base dialog.

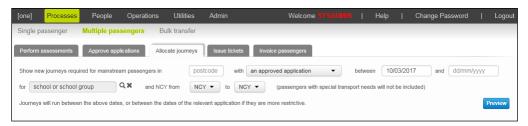
		Choose	a base		
Looking for					
LEA	All				
Туре	Туре				
Control	Please	select			
Active	$\checkmark$				
					[clear] Search
Base	Name 🔶 👘	School Number	LEA	Ba	se Type
Abbey Middle	School	4001	999	JUN	
Westfield Mid	dle School	4033	999	MID	
Showing 1 - 2	2 of 2				< prev   next >

- b. Enter search criteria and then click the **Search** button to view a list of matching bases.
- c. Highlight the desired base and then click the **Select this base** button to select the base and close the browse.
- 6. Select the range of **NCY**s you want to process applications for.
- 7. Enter valid dates into the pending between fields.
- 8. Select an assessment type from the **issued** menu.
- 9. Select an assessment status from the choose eligible status(es) menu.
- 10. Select a status for the applications from the **Mark approved applications as** drop-down menu. The selected applications will be marked with this status after the process is run.
- 11. Click the **Start approvals process** button to process the applications.

NOTE: All selection fields in the Approve applications menu are optional.

# **Creating Journeys in Bulk**

- 1. Select the **Processes** area and select the **Multiple passengers** page.
- 2. Select the **Allocate journey** tab.



- 3. Enter a passenger postcode and between/and dates as required.
- 4. Select an option from the **with** menu. You can choose to create journeys for **Approved Applications**, **Eligible Assessments** or **Issued Assessments**.
- 5. Select a school or school group and add NCY details as required.
- 6. Click the **Preview** button to view a list of applications or assessments that meet your search criteria.

how new je	ourneys required for mainstre	eam passengers in pos	tcode with an approved	application   between	en 09/10/2014 a	and dd/mm/yyyy
rschoo	I or school group	Q X and NCY from NC	Y  to NCY  (page 1)	assengers with special transport nee	eds will not be included)	
ourneys wi	II run between the above dat	es, or between the dates of the rele	vant application if they are more r	estrictive.		Preview
	Passenger	Address	Destination	Route	From	То
F	er lärer bräck	11 te		٩	٩	٩
. •		Keys		٩ [	٩	٩
F	in the in it and			٩	٩	٩
F		376 /	and the state	٩	٩	٩
ĸ		376 /		٩	٩	٩
N		22 W	and the second s	٩	٩	٩
	1.000	376		٩	٩	٩
_ s		22 W	the loss of the	٩ [	٩	٩
] 5				٩	٩	٩
T s	And American			Q	٩	Q

- 7. Highlight the applications you with to create journeys for and then assign a route to them. You can assign routes to journeys in two ways:
  - Use the Route, From and To browses to manually select a route and stops for each journey.
  - Click the Suggest routes & stops button. One Transport will suggest route and stop details for each journey.

**NOTES:** One can only make journey suggestions if the authority has the GISv4 licence and applicable routes, stops and addresses have been geocoded. For more information on geocoding routes and stops see the Geocoding an Address topic of the One Bases Online Handbook, available from www.onepublications.com and My Account.

One will only suggest single leg journeys. If the distance from the address to the boarding stop is too far, One displays a notification. Another leg of the journey can be added manually if required.

8. Click the **Create selected journeys** button to create the journeys.

# **Creating Tickets in Bulk**

- 1. Select the **Processes** area and select the **Multiple passengers** page.
- 2. Select the **Issue tickets** tab.

Perform assessments Approve	applications Allocate journey Issue tickets Invoice passengers
Issue new tickets for passengers i	n postcode and NCY from NCY  to NCY  who have mainstream unticketed journey
between 09/10/2014	and dd/mm/yyyy * for school Q.X
travelling on route route	QX with contractor QX and entitlement any -
Tickets will run between the above Serial number prefix Ticket price	e dates, or between the dates of the relevant journey if they are more restrictive, Tickets will have these details:           prefix         (the unique suffix number will be allocated automatically)           price         (the unique suffix number will be allocated automatically)
Valid for	any route or contractor
Ticket Design	choose ticket design

- 3. Enter **postcode** and **NCY** details as required.
- 4. Select a process status from the **who have** menu.

The **who have** menu enables you to issue tickets to passengers who are at different parts of the allocation process. The menu's options are: **door-to-door unticketed journey, mainstream unticketed journey, an eligible assessment, an issued assessment** and **an approved application.** 

- 5. Enter valid journey dates into the **between** and **and** fields.
- 6. Select a school to issue tickets for:
  - a. Click the school browse to display the Choose a base dialog.

	-				
Looking for					
LEA	All				
Туре	Type				
Control	Please	select			
Active					
				le	ienr] Senn
Bas	e Name 🗧	School Number	LEA	Base Ty	pe
	le School	4001	999	JUN	
Abbey Midd					
	iddle School	4033	999	MID	
	iddle School	4033	999	MID	

- b. Enter search criteria and then click the **Search** button to view a list of matching bases.
- c. Highlight the desired base then click the **Select this base** button to select the base and close the dialog.
- 7. If you selected either **door to door unticketed journey** or **mainstream unticketed journey** from the **who have** menu, fill out the following fields as required.

If you selected a different option from the **who have** menu, skip to step 8. The fields in this step will not display.

- a. Select a route to issue tickets for:
  - i. Click the **travelling on route** browse to display the **Select from all available routes** dialog.

Code			
Description			
			0.44
Base	Schools		Q. <b>X</b>
Туре	All types		•
Area	All areas		
Dates	All		•
			[clear] Searc
Code	Description	Area	Empty seats

- ii. Enter search criteria and then click the **Search** button. A list of matching journeys is displayed.
- iii. Highlight the route you want to issue tickets for and then click the **Select** button to select the route and close the browse.
- b. Select a contractor to issue tickets for:
  - i. Click the with contractor browse to display the Select Contractor dialog.

	Select Contrac	tor	
	Active		
		[Clear Search]	arch
Company Name	Contact	Telephone Act	ive
A1 Cars	Ma	0	
ani10	te	$\checkmark$	
ani131	an	×	
Archer Carrs	Hu	4	
Arrow Travel	Jo	8	
asa	as	$\checkmark$	
Auckland Taxis	Jo	8	
Bailey Travel	Ch	9	
Barton Private Hire	Jo	0	
Bernie's Taxis	Be	2	
Showing 1 - 71 of 71		<pre> prev   nex</pre>	+ >

- ii. Highlight the contractor you want to issue tickets for and click the **Select** button to select the contractor and close the browse.
- c. Select an entitlement status from the and entitlement menu.
- 8. Enter Serial number prefix and Ticket price information as required.
- 9. Select an option from the Valid for menu.
- 10. If you selected **an approved application** from the **who have** menu, select an entitlement from the **Entitlement Code** menu. The **Entitlement Code** menu is not displayed if you selected a different option from the **who have** menu.
- 11. Select a Ticket Design.
- 12. Click the **Issue Tickets** button to issue the tickets to the selected passengers. A summary page displays, indicating how many tickets were issued.

[one]	Processes	People	Operations	Utilities	Admin	Welcome SYS	ADMIN	I	Help	T	Change Password	T	Logout
Single	passenger	Multiple pas	sengers	Bulk transfer									
Perform	n assessments	Approve appl	lications Al	locate journeys	Issue tickets	Invoice passengers							
				735 new ti	ickets have been	issued with serial numbers 655	to 1389.						
				Send th	em to be printed	and mark them as printed							
				Send in	en to be printed								
					[ details	јок							

- 13. If required, select the **Send them to be printed** and **mark them as printed** check boxes and then click the **OK** button. The issued tickets are sent for printing.
- 14. If required, click the **details** hyperlink to view details of the issued tickets.

NOTE: All selection fields on the Issue Tickets tab are optional.

# **Creating Invoices in Bulk**

- 1. Select the **Processes** area and select the **Multiple passengers** page.
- 2. Select the **Invoice passengers** tab.

[one] Processes	People	Operations	Utilities	Admin	Welcome SYSAL	MIN	Help	1 0	Change Password	L 1	Logout
Single passenger	Multiple pass	engers E	lulk transfer								
Perform assessments	Approve applic	ations Alk	ocate journeys	Issue tickets	Invoice passengers						
Generate invoices for pa	ssengers on route	route			Q X going to base	Select a	a base			Q <b>X</b>	
and with journey entitlem	Select	Entitlement	•								
All invoices generated w	ill share the followin	g details :									
Serial number	prefix										
Invoice issued on	10/03/2017	and due	for payment on	10/03/2017							
Covering period from	dd/mm/yyyy	until	dd/mm/yyyy								
Reason for invoice	Please select -	-	•		Address to carer with financia	al responsibi	ility				
Amount	(po	unds) or take	price from ticket p	rice if available							
Budget code	Please select	•									
									[ preview ]	Generate	invoices

- 3. If required, select the **route** and/or **base** whose passengers you want to invoice.
- 4. Select a passenger entitlement code from the **Select Entitlement** drop-down menu.
- 5. If required, enter a **Serial number** for the invoice.
- 6. Enter valid dates into the **Invoice issued on**, **payment on, Covering period from** and **until** fields.
- 7. Select a Reason for invoice.

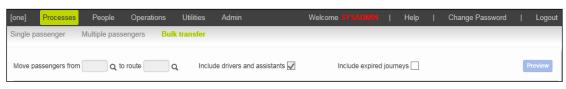
You can only select reasons that have already been created in One. For more information on setting up invoice reasons, see <u>Configuring Invoice Reasons</u> on page 143.

- 8. If required, select the Address to carer with financial responsibility check box.
- 9. Select an invoice amount. There are two ways you can select an amount:
  - Enter an amount (in pounds) into the **Amount** field.
  - Select the or take price from ticket price if available check box.
- 10. If required, select a **Budget code**.
- 11. Click the **Generate invoices** button to generate invoices for all passengers who meet the specified selection criteria.

## **Bulk Transferring Journeys to a New Route**

This utility allows multiple passengers to be transferred from one route to another in a single operation.

1. Select the **Processes** area and select the **Bulk transfer** page.



- 2. Select the route that you want to move passengers from:
  - a. Click the **Move passengers from** browse to display the **Select from all available routes** dialog.

	Select from all availa	ble routes
Code	C	
escription -		
lase	Schools	QX
Гуре	All types	•
Area	All areas	•
Dates	All	
		[ clear ] Search
Code	Description	Area Empty seals
No records to v	ew	<pre>«.prev.) next &gt;.</pre>
		[cancel] Schid

- b. Enter search criteria from and then click the **Search** button to display a list of matching routes.
- c. Highlight a route and then click the **Select** button to select that route and close the dialog.
- 3. Select the route that you want to move passengers to:
  - a. Click the to route browse to display the Select from all available routes menu.
  - b. Enter search criteria and then click the **Search** button to display a list of matching routes.
  - c. Highlight a route and then click the **Select** button to select that route and close the browse.
- 4. If required, select the **Include drivers and assistant** and **Include expired journeys** check boxes.
- 5. Click the **Preview** button. A list of people who would be affected by the transfer is displayed.

Move passengers from SHAR2 Q to route SHAR5	Q Include drivers and assistant	Include expired journeys	Preview
Affected people	Stop mapping to be used		
Name	People from this step on route:	Will move to this step on route:	
✓ Ar	Clapham, Highbury Grove @ 08:00	Transfer but don't allocate to any step -	
✓ Ar	Sharnbrook Upper School @ 08:25	Sharnbrook Upper School @ 08:25 -	
Be Be	Sharnbrook Upper School @ 15:30	Sharnbrook Upper School @ 15:30 •	
Ci Ci	Clapham, Highbury Grove @ 15:55	Transfer but don't allocate to any step	

- 6. Select the passengers you want to transfer using the check boxes in the **Affected people** menu.
- 7. Use the Will move to this step on route menus to define how the steps on the old route will map to the steps on the new route. Each step on the old route has its own Will move to this step on route drop-down menu, enabling you to treat passengers from each step differently.

- To transfer the passengers from a given step on the old route to a specific step on the new route, select the new step from the old step's menu.
- To transfer the passengers from a given step on the old route to the new route without allocating those passengers to a specific stop, select Transfer but don't allocate to any step.
- To avoid transferring passengers who use a specific step, select Don't transfer leave passenger(s) on old route.

When the **Preview** button is clicked, One Transport automatically analyses the old and new routes and suggests a new step mapping in the **Will move to this step on route** field. However, the suggested mappings are fully customisable.

- 8. Select one of the following options:
  - To create new journeys and end the old journeys, select the Create new journeys menu option and enter start and end dates for the new journeys.
  - To directly change the route code for the selected journeys without creating new journeys, select the Change route code on existing journeys menu option.
- 9. If required, select the **Adjust any associated tickets by** check box and select an option from the associated drop-down menu. The available menu items change depending on the option you selected in the previous step.
  - If you selected the Create new journeys radio button you can select to Expire journey tickets by route/ contractor only, Expire tickets for all passengers or Make no changes to tickets.
  - If you selected the Change route code on existing journeys radio button you can select to Change route code/ contractor for journey tickets by route/ contractor, Expire Journey tickets by route/ contractor only or Expire tickets for all passengers.
- 10. Click the **Transfer selected people** button to transfer the selected journeys to the new route.

**NOTES**: If any of the students you are transferring have an application start date before the start date of the route to which you are transferring them, you are prompted to confirm you want to continue with the transfer. Proceeding will not prevent the transfer from working correctly, but it might produce unexpected results in some reports.

You can also access the **Bulk Transfer** page using the **Bulk transfer passengers onto this route** and **Bulk transfer passengers off this route** hyperlinks on the **Operations | Routes | Passengers** tab.

# Bulk Transferring Passengers between Stops on the Same Route

As well as transferring journeys between routes, you can also use the **Bulk Transfer** routine to transfer passengers between different stops on the same route.

To transfer passengers between different stops on the same route, select the same route in both the **from** and **to** fields. When you click the **Preview** button, the same route is displayed in both columns. You can then use the same stop selection process that you would use to transfer journeys between different routes to transfer the passengers. See steps 6-10 of <u>Bulk</u> <u>Transferring Journeys to a New Route</u> on page *40* for more information on this process.

**NOTE:** When transferring passengers between stops on the same route, One replaces the **Change route code on existing journeys** menu option with a **Change steps on existing journeys** option. This is because simply changing the route code would not have any effect given that both the old and new journeys have the same code.

# **03** | Maintaining People

The **People** area enables you to manage people records and customer communications. Person records can be used to store the details of passengers, carers, drivers and passenger assistants.

The **People** area is split into three pages: **Personal info**, **Driver/Assistant info** and **Communications & complaints.** 

# **Managing Personal Information**

The People area enables you to view and manage person details within One Transport.

You must select a person before you can manage his or her details. Once selected, you can view or edit a person's details by selecting the relevant tab and highlighting the desired data item. The following tabs are available on the **Personal info** page:

- Personal enables you to view and edit the person's personal information.
- **Contact** enables you to view and set contact details for the person.
- **Education** enables you to view and edit the person's school history.
- Relationships enables you to view and edit a person's carer details, and view whether a
  person is a carer for anyone else.
- Status enables you to view and edit care and court order details for a person, set the person's home and funding LA, define whether the person is an Asylum Seeker or Student Carer, specify whether the person is involved with Social Services and define whether they are part of a Services or Traveller Family.
- Special Needs enables you to view and edit a person's special transport needs, SEN history and registered disabilities.
- Financial enables you to view and edit a person's Low Income Family (LIF) and Free School Meals (FSM) status.

# **Selecting a Person**

1. Select the **People** area and ensure that the **Personal info** page is selected.

[one] Pr	ocesses <mark>People</mark> O	Operations L	Itilities Admin	N	elcome <mark>SYSAD3/1</mark>	N I	Help	Change Password	Logou
Personal in	fo Driver / assistant info	o Communi	cations & complaints						
Search for	Active people in this authorit	ity 🔹	No person se	lected					
Name	Any name characters								
Person Id	[	)							
Postcode	Туре А	.ny 💌							
Base	Select a base	Q. <b>X</b>	Personal Conta	Education	Relationships	Status	Specia	I needs Financial	
Gender	Either	•							
UPN									
Date of birth	dd/mm/yyyy								
NCY from	NCY • to N	icy 🔹							
	Use contains matching	for names							
	E.	clear] Search							

2. Enter search criteria for the person you want to select. You can enter the following criteria:

Search For: Enables you to search for Active people in this authority, All people in this authority, Active people in any authority or All people in any authority.

**NOTE:** When searching for **Active people in this authority**, One returns passengers whose **Home LA** number, or the LA number of their correspondence address, matches your authority's LA number.

For more information on defining a passenger's home LA, see <u>Recording Status Details</u> on page 53.

Name.

- Person ID: A unique reference number that is generated by One when a new person is added to the database.
- Postcode.
- **Base:** Returns students who attend the selected school.
- Gender.
- UPN.
- Date of Birth.
- NCY range: Use the From and To NCY drop-down menus to specify an NCY range for the search.
- 3. Click the **Search** button. A list of the people who match the entered criteria displays.

If a person has a SEN status of S (Statement) or E (EHCP), then the corresponding status letter is displayed before their name in the search results. This enables you to see which people have SEN statements or EHCP plans in place without having to select them.

**NOTE:** Click the **export** hyperlink at the bottom of the list to export the returned search results into a spreadsheet file.

4. Highlight the person you want to view.

**NOTE:** One Transport displays the number of results matching the entered search criteria at the bottom of the search panel. However, Access Control List (ACL) restrictions are applied in-between the search being completed and the results being displayed. Therefore, the number of results visible on screen may not match the given number of results, depending on the ACLs applicable to your One user ID. For more information on ACLs in One see the RG\_ACL\_ACL Definition reference guide, available from www.onepublications.com and My Account.

## **Creating a Person**

- 1. Select the **People** area.
- 2. Ensure that the **Personal info** page is selected.
- 3. Click the **Search** button to display a list of active people.
- 4. Click the create a new person hyperlink to display the Create a new person dialog.

	Create a new person
First name	
Surname	

- 5. Enter the new person's **First name** and **Surname** into the relevant fields.
- 6. Click the Create a new person button to create the new person record.

# **Editing Personal Details**

- 1. Select a person. For more information on selecting a person, see <u>Selecting a Person</u> on page *42*.
- 2. Ensure that the **Personal** tab is selected. Editable fields relating to the person's details are displayed.

A	and and one of the local division of the	Personal Conta	act Education Relatio	onships Status Special needs Financial	
A	and a second second	Status Active	since dd/mr	m/yyyy because reason for inactivity -	
A		Date of birth	13/09/2000 Age	14/00 Memo + Transport memo +	
A		Gender	Female  Title	Select -	
A	And a second second second	First name		* (chosen first name)	
A	And a state of the second	Middle name(s) Surname		* (chosen surname)	
A	and the second second		[ view name history ]		
A	Concerns of the second	Ethnicity / reli	igion / culture		
4	Language of	> Languages			
4. 4.	Lange and the second	<ul> <li>Deceased</li> <li>Student udfs</li> </ul>			
A	100.000	<ul> <li>&gt; Student udfs</li> <li>&gt; Person udfs</li> </ul>			
A	and the second s			[cancel] Save	

- 3. Make the required changes. The **Personal** tab is split into four sections:
  - Personal Details: Fields relating to the person's names, age and gender.
  - Ethnicity / Religion / Culture: Fields relating to the person's nationality, religious beliefs, and cultural background.
  - Languages: Enables you to select the person's home language, and a different first language if required.
  - **Deceased**: Enables you to record a date of death, if required.
- 4. Click the Save button to confirm your changes.

## Marking a Person as Inactive

- 1. Select a person. For more information on selecting a person, see <u>Selecting a Person</u> on page *42*.
- 2. Ensure that the **Personal** tab is selected.
- 3. Select Inactive from the Status menu.

[one]	Processes	People	Operations	Utilities	Admin	W	elcome <mark>SYSAD</mark>		Help	1 0	Change Password		Logout
Personal	info Drive	er / assistant	info Comm	unications &	complaints								
Search for	Active peo	ple in this auth	ority 🔹				-	-					
	1,20	the state of the	hide all ] Search			i interne in	(no em	ail address)				( actic	ons ♥]
1	Name	DOB	Postcode	C	senger info   Persona	al info   Driver / ass	sistant info ]						
1					sonal Contact	Education	Relationships	Status	Sam	ial needs	s Financial		-
1													
1		a series of the	No. of the local division of the local divis	St	Inactive	▼ since	dd/mm/yyyy	becau	se reas	on for in	activity 🔻		

4. Click the **Save** button to confirm your changes.

**NOTE:** To re-activate the person, select **Active** from the **Status** menu.

## **Recording a Person's Contact Details**

- 1. Select a person. For more information on selecting a person, see <u>Selecting a Person</u> on page *42*.
- 2. Select the **Contact** tab. Editable fields relating to the person's contact details are displayed.

Search for Active p	eople in this authority	•	State Second P			-	-		
	[ clear ( show all ) hide all )	rch	-	the second by	(no en	al address)			[ actions   V ]
Name	DOB Postcod								L denoting (+ )
	T 10 1000 PAL 8	-	[Passenger into   Perso	mail info   Driver / ass	listant info ]				
and the second	a selected bare to	~							
and the second second	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		Personal Contes	1 Education	Relationships	Status	Special needs	Financial	
ACCOUNTS OF A	ACCOUNTS ADDRESS		Primary			Mobile	number		
Aug. 198	and state		Prindiy				110010080		
Bern American	STREET, STREET,	10	Landline	number		a Business	number		
iner inter	inclusion and		Empl						
State Andrews	B-10-80 H 10								
and the second	and the second s		Addressee						
100 Jack	2 - In case of the local of		Correspondence		1 1 1 1 1 1	100	A 100		Q
state county	and sectors and sectors.								-
	and the second sec							1.8/12.8/	Save

- 3. Enter **Primary** contact number, **Mobile** number, **Business** number, **Email** and **Addressee** details as required.
- 4. Select a correspondence address for the passenger:
  - a. Click the **Correspondence** browse to display the **Address history list** dialog.

		~	ddress history list for A	-		-
From	Until 🔤		Address	Туре	Correspondence	
		15	ALC: NO.	Bank		
		14	and the second second	College		
		22	CONTRACTOR OF TAXABLE PARTY.	Home Address	$\checkmark$	
		Bol	strends index with the	Early Years		~

b. Highlight an address and click the **see address details** hyperlink. Editable fields related to address details are displayed.

From	Until 😜		Address			Туре	Correspon	dence
		15	COLUMN TWO IS			Bank		
		14		annia con		College		
		22		a second day		Home Addre	ss 🗹	
		Dollar		-	-	Early Years		
add address	from main catal	ogue   remove address	hide address deta	48]				Close
From dd	/mm/yyyy Ur	dd/mm/yyyy	AddressType	H - Home Addr	055		Correspondence	
	and the second se							
Details	Map & GeoLo	and the second se						
Unique	to this addr	ess						
Building m	umber 1	Bi		UPRN				
Building na	ama 🗍			OSAPR				
Apartment				LA	- Please	select		
Phone nur	nber							
							[ edit these det	ais]
Shared	with other a	ddress						
					_			
Street nam	se (1)			Street name (2)				
District/ville	ngo C	rownhill		Town/city	Mills	on Keynes		
County				Country	UK	- United Kingdor	n	
Postcode		10.00		USBN				
Posicode				USRN				
							edit these det	ails 1

- c. Select the Correspondence check box. This box denotes which of the addresses in the passenger's address history is the current correspondence address. A passenger can only have one correspondence address at a time.
- d. Click the **Save** button and then click the **Close** button to close the dialog and populate the **Correspondence** and **Landline number** fields with the selected address's details.
- 5. Click the **Save** button to save your changes.

# **Editing a Person's Address History**

Adding an Address to a Person's History

- 1. Select a person. For more information on selecting a person, see <u>Selecting a Person</u> on page *42*.
- 2. Select the **Contact** tab. Editable fields relating to the person's contact details are displayed.

		cations & complaints	-		_			
Search for Active pr	copie in this authority 🔹	CORP. Second. P.						
	[clear   show all   hide all ] Search	a summer statement	and sensitive the	. Ino ema	address)			[ actions 'V
Name	DO8 Postcode							
10.10 C		[Passenger Info   Perso	onal info   Driver / ass	istant info [				
and the second	a since some of							
and the second		Personal Contes	Et Education	Relationships	Status	Special needs	Financial	
March 1988	CONTRACTOR OF THE OWNER.	Primary			Mobile	number		
Anna and a	and some	Pinnary						
Born American	STATUTE AND A	Landline	number.	Q	Business	number		
Anna ing i	in the second se	Email						
Street, Manhood	And the second second							
And inter-	And and a second s	Addressee						
200 Jack	2 (married # 192)	Correspondence				1.512		Q
Marco and A	Television in the						Estical	10000
marun, mari	11/03/200%						- I caracial	- Aller

3. Click the Correspondence browse to display the Address history list dialog.

From	Until 🤤	Address	Туре	Correspondence
	15		Bank	
	14	the star has been a set	College	
	22	And a summer set of the set of	Home Address	$\checkmark$
	Bol	and interesting the second second second	Early Years	

4. Click the add address from main catalogue hyperlink to display the Add an address page.

	n address for	
Postcode	Postcode	
Street address	Street address	
	I	clear] Search

5. Enter either the **Postcode** or **Street address** of the address you want to add and then click the **Search** button. A list of the addresses that match your criteria is displayed.

	e address for A	1			
	29	and the second s			
Postcode	ci .	10000			
Street address	Street address				
	(clear) Search				
Address t		Details Map &	GeoLocation		
, 0	~	Unique to this	Contraction of Contra		
, D	a caracterization in the second	Unique to this	address		
. В	A CREAT PRINT AND A	Building number	1	UPRN	
0.200 0.000 0.000	IN COLUMN CONTRACTOR OF THE	Building name		OSAPR	
0	CONTRACTOR AND INC.	Apartment		LA I	- Please select -
, В	A DESCRIPTION OF STREET, STREET, ST.				- 7.5155 (MSL) -
. 0	the state of the s	Phone number			
B					[ edit these details ]
0, 100	the second second second second	Shared with o	ther address		
	and the second second second	Street name (1)	Destringer:	Street name (2)	-
-	IN REPORT ADDRESS AND	Street name (1)	10001-0001-	Street name (2)	
	the second contract of the	District/village	1000000	Town/city	Annual 1
. The set of the	STATISTICS INCOME.	Gounty	Augustants:	Country	- Please select -
s,		Postcode	Common Comm	USRN	
6,	in the second second second second	PORCOOL		03101	
7, 00000 - 000 - 0000	the strength research and				[ edit these details ]
8,	int frames (which it is				
», <b></b>	the Restory Street, or other				
o, itali ana itali	ten denter fallen in de				
	Contract Statement Property of				
Distant stress of	CONTRACTOR CONTRACTOR				
8	Contraction of the local distance				
B	the second second second second				
0	Contra Spinster (Spinster)				
B					
, B <sub>i</sub> nan in an an	A REAL PROPERTY AND ADDRESS OF				
. 8	~				
iew 1 - 100 of 3,21					

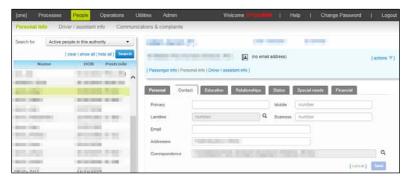
6. Highlight the address you want to add and then click the **Add this address** button to add the address and return to the **Address history list** dialog.

**NOTE:** If the address you want to add is not in the address catalogue, click the **create new address** hyperlink to display the **Create a new address** dialog. For more information on using the **Create a new address** dialog to create new addresses, see <u>Adding an Address to the Address Catalogue</u> on page 125.

- 7. If required, enter valid dates into the From and Until fields.
- 8. If required, select the **Correspondence** check box to mark the new address as the person's correspondence address.
- 9. Select an Address Type.
- 10. Click the **Save** button to save the new address and close the dialog.

#### Editing the Addresses in a Person's Address History

- 1. Select a person. For more information on selecting a person, see <u>Selecting a Person</u> on page *42*.
- 2. Select the **Contact** tab. Editable fields relating to the person's contact details are displayed.



3. Click the **Correspondence** browse to display the **Address history list** dialog.

From	Until 👙	Address	Туре	Correspondence	
	15	State of the second second	Bank		
	14	an allow being being it in	College		2
	22	and the second second provide the	Home Address	1	
	Bol	a strength in the strength of the	Early Years		~
add address	from main catalogue   remove ad	ddress   see address details ]	cally reals	Close	

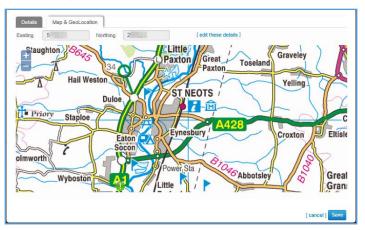
4. Highlight an address and then click the **see address details** hyperlink. Editable fields related to address details are displayed.

ence	Correspond	Туре		5	Addres		Until 🜩	From
		Bank			And a second second	15		
		College		and the second	-	14		
		Home Address		a second Pro-		22		
		Early Years	-	-	STATE AND IN	Bo		
Close				ills ]	s hide address deta	ue   remove address	from main catalog	add address
-	rrespondence	Co	dress	H - Home Add	AddressType	dd/mm/yyyy	mm/yyyy Until	rom dd
						tion	Map & GeoLocat	Details
							o this addres	
			0	UPRN				Building n
				OSAPR			me	Building na
		select	Please	LA				Apartment
							ber	Phone nur
ils ]	edit these deta							
						dress	with other add	Shared
				Street name (2)			e (1)	Street nan
		on Keynes	Milto	Town/city		wnhill	ge Crov	District/vill
			1.00	Country				County
		United Kingdom	UK					
		United Kingdom	UK	USRN			1.00	Postcode

5. Make the desired changes. For more information on editing addresses, see <u>Editing an Address</u> on page *127*.

To edit the fields in the **Unique to this address** and **Shared with other address** sections, click the **edit these details** link underneath the desired section and then click the **Yes – edit address details** button on the following warning dialog. The fields become editable.

- 6. Optionally, geocode the address:
  - a. Click the **Map & GeoLocation** tab to view the address's current geocode details and location on the map.



- b. Click the edit these details hyperlink. A confirmation dialog appears.
- c. Click the **yes- edit address details** button to close the dialog and make the geocode fields editable.
- d. Enter the desired **Easting** and **Northing** values. Alternatively, click and drag the address's icon to the desired spot on the map.
- e. Click the Save button to save your changes and close the dialog.

**NOTE:** The authority must have the GISv4 licence in order for you to use One Transport's geocoding features.

- 7. Click the Close button to close the Address history list dialog.
- 8. Click the **Save** button to save your changes.

## Deleting an Address from a Person's History

- 1. Select a person. For more information on selecting a person, see <u>Selecting a Person</u> on page *42*.
- 2. Select the **Contact** tab. Editable fields relating to the person's contact details are displayed.



3. Click the **Correspondence** browse to display the **Address history list** dialog.

From	Until 🗘		Address	Туре	Correspondence
		15		Bank	
		14	and the second second	College	
		22	CONTRACTOR OF TAXABLE PARTY.	Home Address	$\checkmark$
		Bol	the second se	Early Years	

- 4. Highlight an address and then click the **remove address** hyperlink. A warning dialog is displayed.
- 5. Click the **Yes remove** button to close the dialog and remove the address from the person's history.

**NOTE:** Removing an address from a person's history does not remove that address from the Address Catalogue.

# **Recording a Person's Education Details**

Education information is managed through the **People | Personal info | Education** tab. The **Education** tab enables you to record a person's UPN (Unique Pupil Number), ULN (Unique Learner Number) and NCY (National Curriculum Year), as well as adding the person's school history.

You can also view a passenger's admissions information through the **Education** tab. To do so, click the **view information from admissions module** hyperlink. A report showing the passenger's preferences and associated bases is displayed.

## **Editing UPN, ULN and NCY Numbers**

- 1. Select a person. For more information on selecting a person, see <u>Selecting a Person</u> on page *42*.
- 2. Select the **Education** tab to view the person's **UPN**, **Local UPN**, **ULN** and **NCY** numbers as editable fields.

[one]	Processes	People	Operations	Utilities	Admin	,	Nelcome <b>SYS</b>		Help		Change Password		Logout
Persona	al info Drive	er / assistant i	nfo Comm	unications 8	complaints								
Search for	Active peo	ople in this autho	ority 🔻	]	ai iang								
	[0	lear   show all	hide all ] Search		-		(no	o email addres	is)			[ ac	tions ♥1
	Name	DOB	Postcode	10.0		onal info   Driver / a	and the first of					175	
1.00		Distant manual	-	▲ [Past	senger mio ( Perso	onal Inio   Driver / a	ssistant into 1						
				Pers	sonal Contac	t Education	Relationshi	ps Statu	is Spe	cial nee	ds Financial		
		100		UPN			NCY 8	including	offset of	0	Not following I	NCY	
-		1	-	Local	UPN								
		1000		ULN									
		1.0	COLUMN 1	[ view	r information from a	Admissions module	e] (Opens in a ne	ew browser tal	D)				
				Last	updated by	at 10:49 on 07/	07/2014					[Cance	] Save

- 3. Make the required edits.
- 4. Click the **Save** button to save your changes.

## Adding a School to a Person's School History

- 1. Select a person. For more information on selecting a person, see <u>Selecting a Person</u> on page 42
- 2. Select the **Education** tab.
- 3. Open the **School History** section. A list showing the schools that the person attends and has previously attended is displayed.
- 4. Click the **add school to history** hyperlink to display editable fields related to school details.

#### Maintaining People

	T I I I I I I I I I I I I I I I I I I I	e school from history ]					
School	Select	a base	Q <b>x</b> *	From	09/10/2014	*	Until dd/mm/yyy
Joined because	Plea	se select	•	5.0 🔻	days / week		
Left because	Plea	se select	•				
Registration type	Plea	se select	•				
Registered		Dual registration					
Guest		Residential					
>Udfs							
							[Cancel] Sav

- 5. Select the school that you want to add:
  - a. Select the School browse to display the Choose a base dialog.

		Choose	a base		
Looking for					
LEA	All				
Туре	Туре				
Control	Please s	select			
Active	$\checkmark$				
					[clear] Search
Base N	ame 🔶	School Number	LEA	Bi	ase Type
Abbey Middle S	School	4001	999	JUN	
Westfield Middl	le School	4033	999	MID	
Showing 1 - 2 (	of 2				< prev   next >
[ view details ]				[can	cel] Select this base

- b. Enter search criteria and then click the **Search** button to view a list of matching bases.
- c. Highlight the school you want to add and then click the **Select this base** button to select the school and close the browse.
- 6. Enter valid dates into the From and Until fields.
- 7. Enter Joined because, Left because, days/week and Registration type information as required.
- 8. Select the Registered, Guest, Dual registration and Residential check boxes as required.
- 9. Click the **Save** button to add the school to the person's history.

#### Removing a School from a Person's School History

- 1. Select a person. For more information on selecting a person, see <u>Selecting a Person</u> on page *42*.
- 2. Select the **Education** tab.
- 3. Open the **School History** section. A list showing the schools that the person attends or has attended is displayed.
- 4. Highlight the school you want to remove.

	05/06/2004 Z5 8DD	Personal Contact Education Relationships Status Special needs Financial
	03/07/2006	UPN NCY 4 including offset of 0 Not following NCY
	12/04/1961 Z7 3BD	
10 March 10	29/11/1982 Z7 1CC	Local UPN
	08/01/2000	ULN
	31/03/2007 Z7 8CD	[ view information from Admissions module ] (Opens in a new browser tab)
	08/10/2000 Z9 7AB	
	11/01/2004	Last updated by System Administrator at 15:32 on 11/07/2013 [Cancel]
	08/12/1983 Z11 5AB	
	12/03/1997	
	06/04/1996 Z9 0DA	
	16/04/1975 Z9 8AB	School Days / week From 😓 Until
- 10 C	17/02/1999	Bishop's Waltham Junior School 5 01/09/2010
	31/08/2003 Z11 0BC	
	26/04/2000 Z7 5BD	
	30/06/2006	
	06/08/1997	[ add school to history   remove school from history ]
	04/06/1054 77 200	Lada activation matery   remove activation metricitationy

- 5. Click the **remove school from history** hyperlink. A confirmation dialog is displayed.
- 6. Click the **Delete** button to remove the school from the person's history.

## **Editing a Person's Carers**

A person's carers are managed through the **People | Personal info | Relationships** tab. You can nominate any person in the One Transport database as a carer for another. A list of the people that a given person is a carer for is displayed in the **Carer For** section of the **Relationships** tab.

### Adding a Person's Carer

- 1. Select a person. For more information on selecting a person, see <u>Selecting a Person</u> on page *42*.
- 2. Click the **Relationships** tab. A list of the person's carers and the people that person is a carer for is displayed.



3. Click the **add new carer** hyperlink. Editable fields related to carer details are displayed.

his person is	cared for by the follo	wing people .				
	Name 💠		Gender	Relationship	Parental	Financial
add new car	er   remove selected i	arer   view other o	dependants of thi	is carer ]		
add new car	er   remove selected (		dependants of thi	is carer ]		
	Er   remove selected of Select a person	arer   view other o		is carer ] Gender		_
[ <u>add new can</u> Name Relationship			Gender	Gendèr	Court on	ders 0

#### Maintaining People

- 4. Select the person that you want to add as a carer:
  - a. Click the **Name** browse to display the **Select a person** dialog.

Search for	Active peo	ple in this au	thority		•
Name	Any name	characters			
Person Id					
Postcode			Туре	Any	•
Base	Select a b	ase			Q. <b>X</b>
Gender	Either				•
UPN					
Date of birth	dd/mm/yy	уу			
NCY	All				•
		Use cont	ains ma	atching for	names 🗌
		[ clea	ar   show	w all   hide	all ] Search
	Name		DOB	Po	stCode
No records to	view			< prev	next >

- b. Enter search criteria and then click the **Search** button to bring up a list of people who match those criteria.
- c. Highlight the carer you want to use and then click the **Select** button to select the carer and close the dialog.
- 5. Select the person's Relationship to the carer.
- 6. Enter Contact order, Court orders, Address and Phone number information as required.
- 7. Click the **Save** button to save your changes.

You can only add carers who have already been added to One as a person. For more information on adding people records to One, see <u>Creating a Person</u> on page 43.

#### **Removing a Person's Carer**

- 1. Select a person. For more information on selecting a person, see <u>Selecting a Person</u> on page *42*.
- 2. Click the **Relationships** tab. A list of the person's carers and the people that person is a carer for is displayed.
- 3. Highlight the carer you want to remove.

[one] [	Processes	People	Operations	Utilities	Admin	Welcom	e SYSADWIN	1	Help	1	Change Passwo	rd I	Logou
Personal i	nfo Driv	er / assistant i	nfo Comm	unications	& complaints								
Search for	Active per	ople in this autho	ority 👻										
	I	clear   show all   i	hide all ] Search			-	(no email a	ddress)				[a	ctions 🔻 ]
1	lame	DOB	Postcode		ssenger info   Personal ir	nfo   Driver / assistant	info ]						
,		1.000	J. J.	^				ayoo					
,		N. S. D.			sonal Contact	Education Re	lationships	Status	Spe	cial nee	ds Financial		
,		-	8		Cared for by person is cared for by t	he following people :							
, ,		Contraction of the			Nam		Gender		Relatio	nship	Parental	Financi	al
		-	1.0				F	Mothe	er		Y	N	
/													
,			1.1.11	[ add	i new carer   remove se	lected carer   view oth	er dependants of	this car	ner]				

- 4. Click the remove selected carer hyperlink. A warning dialog is displayed.
- 5. Click the **Yes** button to remove the carer.

# **Recording Status Details**

The **People | Personal info | Status** tab enables you to record a person as having a particular status, such as being part of a services family or subject to a care order.

- 1. Select a person. For more information on selecting a person, see <u>Selecting a Person</u> on page 42
- 2. Select the Status tab.

[one]	Processes	People	Operations	Utilities	Admin	Welcome		Help	Char	nge Password		Logout
Person	al info Driver	/ assistant i	nfo Commu	inications & c	omplaints							
Search fo	Active peop	le in this autho	ority 🔹									
	[ cle	ear   show all	hide all ] Search		in the local lite		(no email ac	ldress)			[act	ions ♥]
	Name	DOB	Postcode	[ Passer	nger info   Personal info	Driver / assistant info	1					
	100	-		$\sim$							_	
		Contraction of the	the difference of	Person	al Contact E	Education Relatio	onships	Status Spe	ecial needs	Financial		
100		101010				et an						
			-		Services le	interest and subort car	e social service holium se	8				
		-	and the second	Status(e				asylum status	7			
				Home L	A local a	uthority	•					
				Funding	LA local a	uthority	•					
P. C.		1.00								1	[Cancel	] Save

- 3. Use the **Status(es)** check boxes to select the required status. The available statuses are:
  - Services family
  - Traveller family
  - Care order
  - Student carer
  - Social services
  - Asylum seeker
- 4. If you selected the **Asylum seeker** check box, select a status from the **asylum status** dropdown menu.
- 5. Select the person's Home LA and Funding LA.
- 6. Click the **Save** button to save your changes.

## **Managing Care Orders**

You can record and edit a person's care orders through the **Public care** section of the **People | Personal info | Status** tab.

### **Recording a Care Order**

- 1. Select a person. For more information on selecting a person, see <u>Selecting a Person</u> on page *42*.
- 2. Select the **Status** tab.
- 3. Open the **Public care** section and click the **add a new care order** hyperlink. Editable fields relating to care orders are displayed.

Aa					
Aa	1000 Ball				
Aa					
Aa	100 C	✓ Public care			
Aa	100000	Cate	egory 💠 🛛 🛛 🛛 🖓 From 🛛 Until	Reason ceased	
Δ <i>ε</i>					
Aa	THE R. LEWIS CO., NAME OF				
Aa					
iê.	10.000 MIN	and the second			
4a	10.00	l add a new care or	der   remove selected care order ]		
Az Az	10.00	Ladd a new care or			
A.a	The second se	Category		• *	
Aa Aa	The second se		category	• *	
Aé Aé Aé	The second se	Category	category local authority	•	
Az Az Az	The second se	Category	category	•	)
Az Az Az Az	The second se	Category	category local authority	Cuml. days in last year     O     this year	)
	The second se	Category LA From	category       local authority       dd/mm/yyyy       # Until	Cuml. days in last year     O     this year	•

- 4. Enter a **Category** for the care order.
- 5. If required, select the LA that issued the care order.
- 6. Enter the start date of the care order into the From field.
- 7. If required, enter the end date of the care order into the **Until** field.
- 8. If applicable, select the reason that the care order was ceased from the **Reason ceased** menu.
- 9. Click the **Save** button to save your changes.

#### **Deleting a Care Order**

- 1. Select a person. For more information on selecting a person, see <u>Selecting a Person</u> on page *42*.
- 2. Select the **Status** tab.
- 3. Open the **Public care** section and highlight the care order you want to delete.

A	the second s	✓ Public care					
A		Cate	egory 🌲	From	Until	Reason	ceased
A	10000	Full Care Order		20/10/2014			
	Concession of the local division of the loca						
	A REPORT OF A R						
		[ add a new care on	dar i ramova salar	tad cars order 1			
	A REAL PROPERTY.	[ add a new care on	del (Ternove selec	ted care order j			
	and the second se					-	
	Concernant of	Category	FC - Full Car	e Order	•	*	
	and the second second second	LA	local authority	/	•		
		From	20/10/2014	* Until		Cuml. days in last year	0 this year 316
	Concernant of the same of	FION	20/10/2014	- Ontai		Cumi. days in last year	U unis year 310
	The second second second	Reason ceased	reason				•
A	Contraction of the later.						[Cancel] Save
	A REAL PROPERTY.						
	1.000	Last updated by Sy	stem Administrator	at 13:45 on 09/10/2	2014		

- 4. Click the **remove selected care order** hyperlink. A confirmation dialog is displayed.
- 5. Click the **Yes** button to delete the care order and close the dialog.

## **Managing Court Orders**

You can record and edit a person's court orders through the **Court Orders** section of the **People | Personal info | Status** tab.

### **Recording a Court Order**

- 1. Select a person. For more information on selecting a person, see <u>Selecting a Person</u> on page *42*.
- 2. Select the Status tab.
- 3. Open the **Court orders** section and click the **add a new court order** hyperlink to view editable fields relating to court orders.

A A		> Public car	e				
A		V Court orde	ers				
Ai			Туре 🚖	From	Until	Dependant	Carer
A							
Ai							
Ai							
Ai		[ add a new court	order   remove selected	. court order ]			
A							
Ai		Туре	type		• 1	ŀ	
A		From	dd/mm/yyyy	* Until	id/mm/yyyy		
A					Q.X.*		Q.X.*
Ai		Dependant	Select a persor	£	4.4.#	Carer	Q <b>X</b> *
A	A DESCRIPTION OF A DESC	>Udfs					
A	100 million (100 m						
Ai	~ ~						[Cancel] Save

- 4. Select an order type from the **type** drop-down menu.
- 5. Enter the start date of the order into the **From** field.
- 6. If required, enter the end date of the order into the Until field.
- 7. Select a dependant:
  - a. Click the **Dependant** browse to display the **Select a dependant** dialog.

Name 👙	Gender	Relationship	Parental	Financial
A,	F	Aunt	Y	Y
M	F	Mother	Y	N
2	м	Mother	Y	N

- b. Highlight the dependant named on the court order and then click the **Select** button to add the carer to the order record and close the dialog.
- 8. Select a carer:
  - a. Click the Carer browse to display the Select a carer dialog.

	Select a ca	rer		
Name 👙	Gender	Relationship	Parental	Financial
3	Si	lf	Ν	Ν
		[ 63	ancel][Search a	li people ] Seler

- b. Highlight the carer named on the court order and then click the **Select** button to add the carer to the order record and close the dialog.
- 9. Click the Save button to add the order.

## **Deleting a Court Order**

- 1. Select a person. For more information on selecting a person, see <u>Selecting a Person</u> on page *42*.
- 2. Select the Status tab.
- 3. Open the **Court orders** section and highlight the court order you want to delete.

A	And a local division of the local division o	> Public car					
All	Resident and resident		Type 💠	From	Until	Dependant	Carer
A		Education Supe	ervision Order	08/10/2014		Management	A
A	and the second se						
A							
A	100000	add a new court	order   remove sele	cted court order ]			
							[ actions 🔻
	And a second second second	Туре	ESO - Educa	tion Supervision Order	•	*	
(			(	* Until			
		From	08/10/2014	- Ontil			
		Dependant	M		Q.X *	Carer A	Q.X.*
	A REAL PROPERTY AND A REAL	A 11-16-					
A	~	>Udfs					
/iew 1 - 100 of 190,552	<pre>c prev   next &gt;</pre>						[Cancel] Save

- 4. Click the **remove selected court order** hyperlink. A confirmation dialog is displayed.
- 5. Click the **Yes** button to delete the court order and close the dialog.

## **Managing Special Needs**

You can record and edit a person's transport needs through the **Special transport needs** section of the **People | Personal info | Special needs** tab.

## Adding a Special Need

- 1. Select a person. For more information on selecting a person, see <u>Selecting a Person</u> on page *42*.
- 2. Select the **Special needs** tab and open the **Special transport needs** section.
- 3. Click the **add a new need** hyperlink to display editable fields related to need details.

Search for	Active people in this authority	A	- F	DOB 12		ID 907	0576	
	[ clear   show all   hide all ] Search	8	(no e	email add	ress)			[actions V]
Name	DOB Postcode							0 0
Aa		[Passenger info   Personal info	Driver / assistant info ]					
Ai							_	
Aa	100 M	Personal Contact I	Education Relationships	s St	atus Sp	ecial needs	Financial	
Aa	and the second second	[ view information from SEN mo	dule ] (Opens in a new brows	ser tab)				
Aa	CONTRACTOR OF ADDRESS	<ul> <li>Special transport ne</li> </ul>	eds (1 current)					
Aa								
Aa	MARKED MARK	Need	Responsible	e person	n A	dd seats	From	Until
Aa	A DECK DECK DECK DECK DECK DECK DECK DECK	MTA - Must Travel Alone				0	06/10/2014	31/10/2014
Aa	the second second	[ add new need   delete seler	ted need ]					
Aa	10000	Need	Select Need	•	*	Additional	seats 0 •	Memo +
Ai	A REAL PROPERTY AND A REAL	Comments	1					
Aa	and the second se	Comments						
Ai	ALCOHOL: MARKING COMPANY	Responsible person	Select a person					Q.X
Aa	Mining and an and	From	dd/mm/yyyy Unt	a T	dd/mm/yyyy	1		
Aa	1000		()					
Aa	THE REPORT OF THE REPORT	> Udf						
Aa	A DESCRIPTION OF THE OWNER						I	Cancel] Save

4. Select a **Need** type.

The **Need** menu only shows those need types that have already been set up in One. For information on setting up additional need types, see <u>Configuring Special Need Types</u> on page *145*.

- 5. Enter Additional seats, Comments, Responsible person, From and Until information as required.
- 6. Click the **Save** button to save your changes.

## **Editing a Special Need**

- 1. Select a person. For more information on selecting a person, see <u>Selecting a Person</u> on page *42*.
- 2. Select the **Special Needs** tab and open the **Special transport needs** section to view a list of the person's current transport needs.
- 3. Highlight the need you want to edit. Editable fields relating to that need appear.

[one] F	rocesses	People	Operations	Utilities	Admin	Welcome 1	SY SALMIN	1 1	Help	Change Pass	word   Lo	ogout
Personal in	1fo Driver	/ assistant i	nfo Commu	inications &	complaints							
Search for	Active peopl	e in this autho	ority 🔻									
Name	bob				all and tables		(no email a	ddress)			[ actions	s ₩]
	[ cle	ar   show all		[Pass	enger info   Personal	info   Driver / assistant info	1					
N	ame	DOB	Postcode					5				
B		120.00		Perso	onal Contact	Education Relation	onships	Status	Special ne	eeds Financia	1	
в		-				N module ] (Opens in a new	browser tab)					
B						t needs (1 current)	100					
B		-			eed	Respo	nsible pers	on	Add sea	ats From	Until	
в			1.00		ARN - Harness				0			
B		-		[ac	to new need   delete	selected need j						
B											[ actions	▼]
B				Nee	bs	HARN - Harnes	s •	*	Addi	tional seats 0 🔻	Memo	+
B		and a state		Cor	mments							
B				Rea	sponsible person	Select a perso	1				Q. <b>X</b>	
в	81.	-		Fro	m	dd/mm/yyyy	Until	dd/mm	l/yyyy			
B		1. The second	E1								[Cancel] Sav	ve

- 4. Make the required changes.
- 5. Click the Save button.

### **Removing a Special Need**

- 1. Select a person. For more information on selecting a person, see <u>Selecting a Person</u> on page *42*.
- 2. Select the **Special Needs** tab and open the **Special transport needs** section to view a list of the person's current transport needs.
- 3. Highlight the need that you want to delete.

[one] F	Processes	People	Operations	Utilities	Admin	Welcome	SYSADMIN	Į.	Help	T (	Change Password	1	Logout
Personal in	nfo Driver	/ assistant i	nfo Comm	unications 8	k complaints								
Search for	Active peop	le in this auth	ority 🔻										
Name	bob						(no email ad	dress)				[ acr	tions ♥]
	[ cle	ear   show all	hide all ] Search	[ Pass	senger info   Personal i	info   Driver / assistant ir	nfo ]						
N	lame	DOB	Postcode	_									
Baard		1.000		A Pers	onal Contact	Education Rela	ationships	Status	Spe	cial needs	Financial		
B		-		I view	r information from SEN	module ] (Opens in a n	ew browser tab)						
B		-				needs (1 current)							
B			0.000.000	¥ 3	pecial transport	neeus (1 current)							
В				N	eed	Resp	onsible perso	n	Ad	d seats	From	Unti	il
Barris				н	ARN - Harness					0			
B				[a	dd new need   delete s	elected need ]							

- 4. Click the **delete selected need** hyperlink. A warning dialog is displayed.
- 5. Click the **Delete** button to delete the selected need.

# Managing a Person's SEN Status

The **SEN Stage History** records for the student are displayed. The information is view only and shows **SEN Stage**, **Source**, **Start Date** and **End Date** which can be sorted by clicking on a field header.

Bearch for	Active people in this authority -	C ; T ;(M)	DOB 01/01/2010	D 8895236	
Name	das		(no email address)		[actions ♥]
Person Id	0095236				( depend of )
	[ clesr   show all   hide all ] Search	[Passenger info   Personal info   Driver / assistant i	into I		
1	Name DOB Postcode	Personal Contact Education Rel	lationships Status Spo	cial needs Financial	
(E)anir: -	01/01/2010	Statements and	new hrowear tah)	1.00	
(E)anin T	01/01/2010	[view information from SEN module ] (Opens in a r		17.0	
(E)anir: 👘	01/01/2010	Statements and			
(E)anin –	01/01/2010	[view information from SEN module ] (Opens in a r > Special transport needs (0 current			
(E)anir. –	01/01/2010	[view information from SEN module ] (Opens in a r			
(E)anir. –	. 01/01/2010	[view information from SEN module ] (Opens in a r > Special transport needs (0 current		Start date 🕫	End date
(E)anir: T	01/01/2010	[view information from SEN module ] (Opens in a r > Special transport needs (0 current + SEN stage history	6)	Start date + 11/11/2015	End date
(E)anin –	01/01/2010	[view information from SEN module ] (Opent in a r > Special transport needs (0 current + SEN stage history Stage	t) Source		End date
(E)anin –	01/01/2010	[view information from SEN module ] (Opent in a r > Special transport needs (0 current + SEN stage history Stage Education Health and Care Plan	t) Source CCS	11/11/2015	End date
(E)anin —	01/01/2010	[view information from SEN module ] (Opens in a r > Special transport needs (0 current v SEN stage history Stage Education Health and Care Plan School Action	t) Source CCS EMS	11/11/2015 18/12/2013	End date

If a person has a SEN status of S (Statement) or E (EHCP), then the corresponding status letter is displayed before their name in person search results throughout One Transport. This enables you to see which people have SEN statements or EHCP plans in place without having to select them.

# **Recording a Person's Disability Status**

You can record and edit a person's disability details through the **Disabilities** section of the **People | Personal info | Special needs** tab.

## **Recording a Disability**

- 1. Select a person. For more information on selecting a person, see <u>Selecting a Person</u> on page *4*2.
- 2. Select the Special Needs tab and open the Disabilities section.
- 3. Click the **add a new disability** hyperlink. Editable fields relating to disability details are displayed.

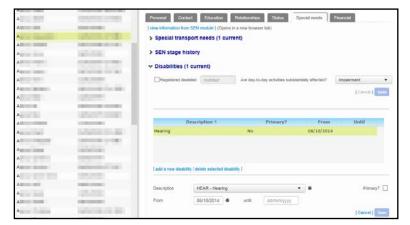
A	1000 AV 5 85	Personal Cont	nct Education	Relationships St	the Special needs	Financial
Action	And in case of the local division of the loc	( view information from	n SEN module   (Opens	in a new browser tab)		
4	COLUMN PROFESSION	and the second second	port needs (1 cur			
Actor and and	100 100 100 10 100 1					
A	Distantia di Cara di Ca	> SEN stage hi	story			
wild menters	NUMBER OF BRIDE	Discould be a				
4	Statistics Statistics	✓ Disabilities (0)	current)			
A COLUMN TWO IS NOT	1000000000	Registered disc	bled number	Are day-to-day activ	ties substantially affected?	Impairment .
April Internet	and the second state of the					[Cancel] Save
A COLORADO	10000					[ Cances ] Save
AND IN CO.	ALC: UNK DOM: NO. 10.					
100 M	NUMBER OF TAXABLE					
ene annual i	100001-000		Description	Prim	ary? From	🗢 Until
1	THE R. LEWIS CO., NO. 1					
/10.000	NUMBER OF STREET					
47 M M M M M M M M M M M M M M M M M M M	and the state of					
And a second second second	ALC: U.S					
and a second second	second and in the	Ladd a new disabl	N I delete enfected disa	ostv 1		
12	Received and					
and the second se	Access to a local data	Description	description			Primary?
0	100000	Description	nescuption			Primary?
CT01	NUMBER OF TAXABLE PARTY.	From	dd/mm/yyyy 🏶	until dd/m	mlyggy	
CL. PRIMA	NUMBER OF THE					[Cancel] Sim
and the second second	and the second se					( our of )

4. Select a disability type from the **Description** field.

- 5. If the disability is the person's primary disability, select the **Primary?** check box.
- 6. Enter valid dates into the From and until fields.
- 7. Click the **Save** button to add the disability.

## **Editing a Disability**

- 1. Select a person. For more information on selecting a person, see <u>Selecting a Person</u> on page *42*.
- 2. Select the **Special Needs** tab and open the **Disabilities** section. A list of the person's currently recorded disabilities is displayed.
- 3. Highlight the disability you want to edit. Editable fields related to that disability are displayed.



- 4. Make the required changes.
- 5. Click the Save button.

## **Deleting a Disability**

- 1. Select a person. For more information on selecting a person, see <u>Selecting a Person</u> on page *42*.
- 2. Select the **Special needs** tab and open the **Disabilities** section. A list of the person's disabilities is displayed.

A		Personal Contact	Education	Relationships Status	Special needs	Financial
A	CONTRACTOR OF	[ view information from SEN n	nodule ] (Opens	in a new browser tab)		
A	the second s	> Special transport r	eeds (1 cur	rent)		
A						
A		SEN stage history				
A	and the second se	V Disabilities (1 curr	ent)			
A	and the second second					
A	and the second second	Registered disabled	number	Are day-to-day activities su	bstantially affected?	Impairment -
A	Concerning the second					[Cancel] Save
A						
A	The second se					
A						1111112
A		Descri	otion 💠	Primary?	From	Until
A	and the second s	Hearing		No	08/10/2014	
A	1					
A	Contraction of					
A						
A	Contraction of the local	[ add a new disability   dele	ete selected disa	ibility ]		

- 3. Highlight the disability you want to delete and then click the **delete selected disability** hyperlink. A warning dialog is displayed.
- 4. Click the **Yes** button to delete the disability and close the dialog.

## **Recording a Person as Registered Disabled**

- 1. Select a person. For more information on selecting a person, see <u>Selecting a Person</u> on page *42*.
- 2. Select the **Special needs** tab and open the **Disabilities** section. A list of the person's disabilities is displayed.
- 3. Select the **Registered disabled** check box.

Ai	Personal Contact Education Relationships Status Special needs Financial
Ai	[ view information from SEN module ] (Opens in a new browser tab)
Ai	> Special transport needs (1 current)
A	
Ai	> SEN stage history
A	✤ Disabilities (1 current)
Ai	
Ai	Registered disabled number Are day-to-day activities substantially affected? Impairment
A	[Cancel] Save

- 4. If known, enter the person's disability registration number.
- 5. Select an impairment status from the **Impairment** menu. The available options are:
  - Impairment
  - Declined to Specify
  - Disabled
  - Not Disabled
  - Not Known
- 6. Click the **Save** button to save your changes.

# Managing a Person's LIF Status

You can record and edit a person's Low Income Family (LIF) details through the **Low Income Family** section of the **People | Personal info | Financial** tab. This information is used when assessing transport eligibility.

### **Recording a LIF Event**

- 1. Select a person. For more information on selecting a person, see <u>Selecting a Person</u> on page *42*.
- 2. Select the Financial tab.

[one] P	rocesses	People	Operations	Utilit	ies Adr	nin	N N	/elcome \$Y\$4D		Help	Chang	e Password		Logout
Personal in	ifo Driver	r / assistant i	nfo Con	nmunicati	ions & comp	laints								
Search for	Active peop	de in this autho	nity	•	tions i	-		1.00	-	100				
Name	bob				7		a laine	p 🔝 (no en	nail address)				[ acti	ons ¥1
	[ ci	cor   show all	hide all ] Sea	rch	(Passenger i	nto   Personal	into   Driver / as	sistent info (						
	ame	DOB	Postcode		-									
				^	Personal	Contact	Education	Relationships	Status	Special	needs	Financial		
Ball Balls		10.0	ALC: UNK		- Low In	come Fam	ily						[ acti	ons 🔻 ]
March Street					Checked	From	Recorded en	vents Status				ting effecti m 1	ve LIF sta Until	atus
March Street														
Anna Anna		-	1.101											
March Street		-												
Sec. 101		1.0	R. B.											
March Street	-	-	100.0001											
Barris and		-												
Real Property			1.00		[ add new LIF	l edit i delete	1							
					2									

3. Open the Low Income Family section and click the add new LIF button to display the Add/ Edit LIF status dialog.



- 4. Enter valid dates into the From, Until and Checked Date fields.
- 5. Click the **Save** button to add the event and close the dialog.

#### **Deleting a LIF Event**

- 1. Select a person. For more information on selecting a person, see <u>Selecting a Person</u> on page *42*.
- 2. Select the Financial tab.
- 3. Open the Low Income Family section and highlight the LIF event that you want to delete.

Search for Activ	e people in this authority 🔹	A D08 12 ID 9070576
	[ clear ] show all [ hide all ] Search	8 (actions V)
Name	DOB Postcode	
Andenda silimiti		[Pensenger info   Pensonal info   Deiver / assistant info ]
A	A CONTRACTOR OF THE OWNER	
A	Concerns of the local division of the local	Personal Contact Education Relationships Status Special needs Financial
A	and these	V Low Income Family [actions V]
A	Contraction of the local division of the loc	Recorded events Resulting effective LIF status
A	and the second sec	Checked From Until Status
A	THE OWNER OF THE OWNER OWNER OF THE OWNER OWNE	10/10/2014 22/10/2014 Recorded LIF 10/10/2014 22/10/2014
A	Contraction of Arts 1	
A	100000000000000000000000000000000000000	
A	1 Minister	
A	and the second se	
A	10000000	
A	and the second se	
A	Concerns of the local division of the local	
A	and the second s	[add new LHF   edit   delete ]

- 4. Click the **Delete** hyperlink. A warning dialog is displayed.
- 5. Click the Yes button to delete the record.

# **Managing Driver and Passenger Assistant Information**

The **People | Driver/assistant info** page enables you to view and manage driver and passenger assistant details within Transport.

You must select drivers/assistants before you can manage their details. You can view or edit driver/assistant information by selecting the relevant tab on the **Driver/assistant info** page and highlighting the desired data item. The **Driver/assistant info** page includes the following tabs:

- Role details enables you to view and edit a driver/assistant's role, badge number, licensing details, status and contractor details.
- Checks enables you to view, record and edit clearance checks for the selected driver/assistant.
- Training enables you to view, record and edit details of training courses undertaken by the selected driver/assistant.
- Bases enables you to view and edit the list of bases that the selected driver/assistant can operate from.
- **Routes** enables you to view a list of the routes worked by the driver/assistant.

# Selecting a Driver/Passenger Assistant

1. Select the **People** area and select the **Driver/assistant info** page.

[one] P	rocesses <mark>People</mark> Ope	rations L	Itilities Admin	Welcome	ysadmin	Help	Change Password	Logout
Personal inf	0 Driver / assistant info	Commun	ications & complaints					
Search for	People	•	No person select	ted				
Name	Any name characters							
Contractor		Q. <b>X</b>						
Person Id								
Postcode	Туре Апу	•	Role details Checks	Training Bases	Routes			
Base	Select a base	Q. <b>X</b>						
Date of birth	dd/mm/yyyy							
Gender	Either	•						
	Use contains matching for	names 🔲						
	[ clea	ar] Search						

- 2. Enter search criteria for the driver/assistant you want to select. You can search using the following criteria:
  - Search For: Select from People, Drivers, Passenger assistants or Passenger. If you select any option other than People, an additional drop-down called Role Status is displayed. From here you can further refine your search criteria by selecting Active (default), Inactive or All.
  - Name
  - **Contractor:** Returns drivers/assistants who work for a specific contractor.
  - Person ID: A unique reference number that is generated by One when a new person is added to the database.
  - Postcode
  - **Base:** Returns drivers/assistants who travel to a specific base.
  - Date of Birth
  - Gender.
- 3. Click the **Search** button to display a list of drivers/assistants that match the entered search criteria.

**NOTE:** Click the **export** hyperlink at the bottom of the list to export the returned search results into a spreadsheet file.

4. Highlight the driver/assistant you want to view.

[one] Pr		People O		tilities Admin cations & complaint	s	Welcome 🕯	iysadmin	Help	C	Change Password	1	Logout
Search for	Drivers		•	\$ D			DOB 2	1	ID			
Role Status	Active		•	High Street, Financia	-		test@madeuppe	erson.com 01			[ ac	tions ¥]
N	[ clea	ar   show all   hid DOB	e all ] Search PostCode	[ Passenger info   F	ersonal	info   Driver / assistant info ]						
Δ		0	₩ W	Role details	Checks	Training Bases	Routes					
4		0	M Y	Role type	Dr	iver	• ]				[ ac	tions <b>v</b> ]
				Badge number	D	/LA12					Me	mo 🕇
3		23/ 1	M A	Licenced		PSV - PSV Licence	•					
		1000 A	4 M R	Checked		V - Vetted	•					
2		01/ 5		Status type	C	CE - County Council Employ	vee 🔹					
		01/	M 1	Role ends on	do	l/mm/yyyy						
				Contractor	FF	F company Itd				Q×		
											[cancel]	Save

**NOTES:** You can also select driver/passenger assistant details via the **People | Personal info** page. Select drivers/assistants with the **Driver/Assistant Info** page when you want to view or edit details specifically relating to that person's role (such as contract details or training completed) and the **Personal info** page when you want to view or edit personal details such as the driver/assistant's name and address.

One Transport displays the number of results matching the entered search criteria at the bottom of the search panel. However, Access Control List (ACL) restrictions are applied in between the search being completed and the results being displayed. Therefore, the number of results visible on screen may not match the given number of results, depending on the ACLs applicable to your One user ID. For more information on ACLs in One see the RG\_ACL\_ACL Definition reference guide, available from www.onepublications.com and My Account.

# **Creating a Driver/Passenger Assistant**

- 1. Create a person record for the driver/passenger assistant. For more information on creating people records, see <u>Creating a Person</u> on page *43*.
- 2. Select the person record that you just created. For more information on selecting drivers/assistants, see <u>Selecting a Driver/Passenger Assistant</u> on page 62.
- Ensure that the Role details tab is selected. Editable fields related to the driver/assistant's role are displayed.

A		Role type	Sel	ect role type	<b>*</b>		[actions V]
A	and the second second	Badge number					Memo 🕇
A		Licenced		Licence type	*		
A	Contraction of the local division of the loc	Checked		Check type	*		
A	a second second s	Status type	Sel	ect status type	•		
A	and the second s	Role ends on	dd	/mm/yyyy			
A		Contractor				Q×	

- 4. Select either Driver or Passenger Assistant from the Role Type menu.
- 5. Enter Badge number, Licenced, Checked, Status type and Role ends on details as required.
- 6. Select a contractor:
  - a. Click the **Contractor** browse to display the **Select Contractor** dialog.

	Active		
		[Clear Search	] Search
Company Name	Contact	Telephone	Active
A1 Cars	Ma	0	✓
ani10	te		
ani131	an		✓
Archer Carrs	Humor	4	$\checkmark$
Arrow Travel	Jo	8	$\checkmark$
asa	as		$\checkmark$
Auckland Taxis	Jo	8	$\checkmark$
Bailey Travel	Ch	9	$\checkmark$
Barton Private Hire	Jo	0	$\checkmark$
Bernie's Taxis	Be	2	<ul> <li></li> </ul>
Showing 1 - 71 of 71		<pre>&lt; pre</pre>	v   next >

- b. If required, enter the contractor's name into the **Search with company name** box and then click the **Search** button. A list of contractors matching the entered details is displayed.
- c. Highlight a contractor and then click the **Select** button to select that contractor and close the browse.
- Click the Save button to save your changes and convert the standard person record to a driver/assistant record.

## **Editing Driver/Passenger Assistant Role Details**

- 1. Select a driver/passenger assistant. For more information on selecting drivers/assistants, see <u>Selecting a Driver/Passenger Assistant</u> on page 62.
- 2. Ensure that the **Role details** tab is selected. Editable fields relating to the driver/assistant's role are displayed.
- 3. Make the required changes.
- 4. Click the **Save** button to save your changes.

**NOTE:** The **People | Driver/Assistant Info | Role Details** tab only enables you to edit a driver/assistant's role details, such as their **Badge Number** or **Role Type**. To edit a driver/assistant's personal details, use the **People | Personal info | Personal** tab. For more information on editing personal information, see <u>Editing Personal Details</u> on page 44.

## **Recording Driver/Assistant Clearance Checks**

One Transport v4 enables you to record the results of DBS (Disclosure and Barring Service) checks against drivers and passenger assistants. DBS checks have replaced CRB (Criminal Records Bureau) checks.

## **Adding Clearance Checks**

- 1. Select a driver/passenger assistant. For more information on selecting drivers/assistants, see <u>Selecting a Driver/Passenger Assistant</u> on page 62.
- 2. Select the Checks tab.
- 3. Click the **add new check** hyperlink. Editable fields relating to check details are displayed.

[one] Processes	People O		Utilities Admin	Welcome <b>Sysim</b>	lmin ( H	lelp	Change Passwo	ord   Logo
Personal info Driver	/ assistant inf	o Commur	nications & complaints					
Search for Drivers		•	🗘 K		DOB	ID (		
Role Status Active		•	11/	R Test1	11@test.com			[ actions W
	ear   show all   hid		[Passenger info   Personal info	Driver / assistant info ]				
Name	DOB	PostCode						
Aé	~	MW	Role details Checks	Training Bases	Routes			
st and a statement of the	0	M J M /	Application reference	Application date	Clearance	type D	Decision I	Decision date
	•	- F						
	0	M						
1	2	1 M U						
	24	4 M R						
	0	5 M	[ add new check   delete select	ted check ]				
		M						
	01	5 M J	Application reference					
			Clearance type requested	Select clearance type	• *	on	dd/mm/yyyy	*
				Construction of the				
			Disclosure reference			Destroy on	dd/mm/yyyy	
			Checked on	dd/mm/yyyy				
			Decision	Select decision	•	on	dd/mm/yyyy	*
			Countersignatory	Select Countersignatory	•	Reference		
			Invoice number	r.		Amount		
				(		, and an		
			Invoice point type	Base	•			
			Invoice point		Q¥			
								Memo +
								[ cancel ] Save
showing 1 - 10 of 10	< pr	ev   next >						[ cancel ] Save

- 4. Enter an Application reference.
- 5. Select a clearance type from the **Clearance type requested** field and enter a valid date into the **on** field.
- 6. Enter Disclosure reference, Destroy on, Checked on, Decision, Countersignatory, Reference, Invoice number and Amount details as required.
- 7. Select an **Invoice point type.** The invoice point type denotes the type of entity to be invoiced for the check. The available options are **Base**, **Contractor**, **Employee** and **Person**.
- 8. Select an invoice:
  - a. Click the **Invoice point** browse to display a selection dialog. The selection dialog presented varies depending on the invoice point type selected:
    - Selecting **Base** from the **Invoice point type** menu causes the **Choose a base** dialog to open when the **Invoice point** browse is clicked.
    - Selecting Contractor from the Invoice point type menu causes the Select Contractor dialog to open when the Invoice point browse is clicked.
    - Selecting **Employee** from the **Invoice point type** menu causes the **Select an employee** dialog to open when the **Invoice point** browse is clicked.
    - Selecting Person from the Invoice point type menu causes the Select a person dialog to open when the Invoice point browse is clicked.
  - b. Search for and select the invoicee.
- 9. Click the **Save** button to add the check.

#### **Deleting Clearance Checks**

- 1. Select a driver/passenger assistant. For more information on selecting drivers/assistants, see <u>Selecting a Driver/Passenger Assistant</u> on page 62.
- 2. Select the Checks tab.
- 3. Highlight the check you want to delete.

[one] Pi	rocesses	People Op	erations U	tilities Admin	Welcome sysm	nin (; Help	Change Pas	sword   Logout		
Personal infe	o Driver /	assistant info	Communi	cations & complaints						
Search for	Drivers		• ]	÷ D	c.	OOB	ID {			
Role Status	Active		•	High Street, test@madeupperson.com [actions V]						
	[ cle	ar   show all   hide	all ] Search	[ Passenger info   Personal info						
N	ame	DOB	PostCode							
A			M N	Role details Checks	Training Bases R	outes				
Al		0	M							
Al	-	0	Mana	Application reference	Application date	Clearance type	Decision	Decision date		
D				DC0102	01/02/2003	L99	Cleared	21/02/2003		
G		0	M							
H		2 1	M J							
Pc		2 4	MR							
Ra		0 5	M	[ add new check   delete selecte	d check 1					
Ri			Mana							
		1211 IS								

- 4. Click the **delete selected check** button. A warning dialog is displayed.
- 5. Click the **Yes** button to delete the check.

# **Recording a Driver/Assistant Training Course**

The **People | Driver/Assistant Info | Training** tab enables you to record the details of any courses or qualifications that the selected driver/assistant may have taken.

#### **Adding a Training Course**

- 1. Select a driver/passenger assistant. For more information on selecting drivers/assistants, see <u>Selecting a Driver/Passenger Assistant</u> on page *6*2.
- 2. Select the **Training** tab.
- 3. Click the **add new course** hyperlink. Editable fields related to course details are displayed.

Ai	Contraction of Contra	Role details	Checks Training	Bases Routes		
A	5AB	Cour	se description	Completion date	Qualification obtained	Data source
Ai	and the second sec					and the second
Aand	BAB					
Ai	10 M					
A:						
A	100 B 100					
Ai	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	[ add new course	delete selected course ]			
A	and the second se					
Ai	and shares in the second se					
A	And the second sec	Description			*	
Ai		Completed on	dd/mm/yyyy 🟶	Duration (days)		
A	A REPORT OF A R	Qualification	Select qualification		•	
Ai		Qualification	Select qualification			
A	10000	Level	Select level		•	
Ai	10.00.000	Cost		Fund		
A						
A	Carried .	Renewal due	dd/mm/yyyy			
Ai						Memo 🕂
A	Contraction of the local division of the loc					[cancel] Save
A						[ compet ]

- 4. Add a Description of the course.
- 5. Enter a valid **Completed on** date.
- 6. Enter Duration(days), Qualification, Level, Cost, Fund and Renewal due details as required.
- 7. Click the **Save** button to add the course.

#### **Deleting a Training Course**

- 1. Select a driver/passenger assistant. For more information on selecting drivers/assistants, see <u>Selecting a Driver/Passenger Assistant</u> on page 62.
- 2. Select the **Training** tab. A list of the courses undertaken by the driver/assistant is displayed.
- 3. Highlight the course you want to delete.

Name	DOB PostCode	[Passenger info   Personal info   Driver / assistant info ]						
A	^							
A	Contraction of the local division of the loc	Role details Checks Training	Bases Routes	o life the date of	2.1			
A	100.000	Course description Test	Completion date 10/10/2014	Qualification obtained	Data source			
A	Concerns and the							
	and the second s							
A								
A	THE R. LEWIS CO., LANSING MICH.	[ add new course   delete selected course ]						

- 4. Click the **delete selected course** hyperlink. A warning dialog is displayed.
- 5. Click the **Delete** button to delete the course.

# **Editing Driver/Assistant Bases**

The **People | Driver/Assistant Info | Bases** tab shows an editable list of the bases that a given driver/assistant can operate from.

#### Adding a Base to a Driver/Assistant

- 1. Select a driver/passenger assistant. For more information on selecting drivers/assistants, see <u>Selecting a Driver/Passenger Assistant</u> on page 62.
- 2. Select the Bases tab.



- 3. Click the **add a new base for this driver/assistant** hyperlink. The **Select a base** browse is displayed.
- 4. Select the base that you want to add:
  - a. Click the Select a base browse to display the Choose a base dialog.

#### Maintaining People

Choose a base									
Looking for									
LEA	All								
Туре	Туре								
Control	Please s	elect							
Active	$\checkmark$								
					[clear] Search				
Base N	lame 💠 👘	School Number	LEA	Bas	е Туре				
Abbey Middle	School	4001	999	JUN					
Westfield Midd	lle School	4033	999	MID					
Showing 1 - 2	of 2			<	prev   next >				
[view details]				[cance	Select this base				

- b. Enter search criteria and then click the Search button to view a list of matching bases.
- c. Highlight the desired base and then click the **Select this base** button to select the base and close the browse.
- 5. Click the **Save** button to add the base to the driver/assistant record.

#### Deleting a Base from a Driver/Assistant Record

- 1. Select a driver/passenger assistant. For more information on selecting drivers/assistants, see <u>Selecting a Driver/Passenger Assistant</u> on page 62.
- 2. Select the **Bases** tab.

Role details Checks Training Bases Routes		
Base Name	School Number	LEA
ACS Cobham International School	6529	936
[ add new base for this driver / assistant   remove selected base from the list	st 1	

- 3. Highlight the base you want to delete and click the **remove selected base from the list** hyperlink. A warning dialog is displayed.
- 4. Click the **Yes** button to delete the base from the driver/assistant record.

# Viewing Routes Worked by a Driver/Assistant

- 1. Select a driver/passenger assistant. For more information on selecting drivers/assistants, see <u>Selecting a Driver/Passenger Assistant</u> on page 62.
- Select the Routes tab. A list of all the routes that the selected driver/assistant works is displayed.

[one] Pr	ocesses	People Op	perations U	tilities Admin	Welcome	e sysadmin	Help	Change Pas	sword   L	.ogout		
Personal info	Driver	assistant info	Communi	cations & complaints								
Search for	Drivers		•	* D	-	DOB	- 0	ID				
Role Status	Active		•	High Street,		test@madeupper	son.com		[actions ¥]			
	[ cle	ar   show all   hide	e all ] Search	[ Passenger info   Perso	nal info   Driver / assistant info	o]						
Na	ame	DOB	PostCode	12 12 13	24							
A			M W	Role details Cheo	cks Training Base	Routes						
A		0	M									
4	-	0	M Y	between 20/10/201	7 and dd/m	m/yyyy			[ action	is VI		
D				Route	De	escription		Fro	m Until			
3		0	M	BDCC01 Bedfo	ord Day Care Centre - Rou	ite 01						
H		2 1	U U	ABB001 Abbey	y Middle School							
Pr		2. 4	R									

3. If required, enter dates into the **between** and **and** fields. The list is filtered to show only those routes worked by the selected driver during the specified date range.

# **Managing Communications**

The **People | Communications & complaints** page enables you to record, search for and edit all transport-related communications. The page is broken down into the following sections:

- **Search**: Enables you to search for the details of a specific communication.
- Addressing Details: Enables you to view the selected communication's senders and recipients.
- **Contents**: Enables you to view and edit the content of the selected communication.
- Response: Enables you to designate a person to respond to the selected communication and set deadlines for that response to be sent.
- **Complaint Details**: Enables you to record complaint details and their resulting actions.

You can also access the **Communications & complaints** page by selecting a passenger or contractor and selecting either **view communications** or **create communication** from the **actions** menu.

In One Transport, the term "communication" refers to all transport-related customer and contractor contact events, while the term "complaints" refers only to those contact events that have been flagged as complaints. All complaints are communications, but not all communications are complaints.

# **Selecting a Communication**

1. Select the **People** area and select the **Communications & complaints** page. Editable fields relating to communication details are displayed.

		From To	Cc				
Show	all communications		Name	Q or about	Type of entity 🔹	Entity	٩
between	dd/mm/yyyy and and	ld/mm/yyyy	and which include		in the description.	[ c	lear] Search

2. Select a communication type to search for from the **Show** menu. You can choose to search for **all communications** or **only complaints**.

- 3. Select a person who is involved in the communication:
  - a. Select one or more of the **From**, **To** or **Cc** check boxes. These check boxes enable you to specify whether the person is the sender or recipient of the communication.
  - b. Click the Name browse and select either person or contractor from the pop-up menu. Either the Select a person or Select Contractor dialogs will appear, depending on the option you selected.
  - c. Enter search criteria and then Select the desired person or contractor.
- 4. Select the subject of the communication:
  - a. Select a subject type from the **Type of entity** menu. The available options are **person** and **contractor**.
  - b. Click the **Entity** browse. Either the **Select a person** or **Select Contractor** dialogs will appear, depending on the option you selected.
  - c. Enter search criteria and then Select the desired person or contractor.
- 5. Enter valid dates into the **between** and **and** fields.
- 6. Enter description text into the **and which include** field.
- 7. Click the Search button. A list of communications matching the entered criteria is displayed.

NOTE: To sort the communications by date, click the On label.

Show	all communications	From 1	Cc	Q	or about	Type of entity	ty	٩
between	dd/mm/yyyy	and dd/mm/yyyy	and which include			in the description.	[clear]	Search
Su	ubject	From	То	On		Description	Is Compl	aint
	Sc		A	03/05/2001				
A	Sc		A	03/05/2001				
	N		۲	16/05/2001				
	Né		۲.	16/05/2001				
A	S		A	03/10/2001				
			S	03/10/2001				
<							>	+
Showing 1 - 1	00 of 479						< prev   next	>
create new com	nmunication 1							

8. Highlight a communication to select it.

**NOTE:** All selection fields are optional. To search for all existing communications, click the **Search** button without entering any search criteria.

#### **Reading Communication Messages**

There are two ways to read the text of a communication:

 Select a communication and open the Contents section. The content of the message is displayed in the Body field.



Select one or more communications and click the read selected communications hyperlink.
 A separate window opens, showing the text of the selected messages in an email-like format.



# Sending a Communication via Email

- 1. Select a communication. For more information on selecting communications, see <u>Selecting a</u> <u>Communication</u> on page *69*.
- 2. Click the **send this communication as an email** hyperlink. An email with the same subject and body as the communication opens in your default email client.

# **Recording a Communication**

- 1. Select the **People** area and select the **Communications & complaints** page.
- 2. Click the **create new communication** hyperlink. Editable fields relating to communication details are displayed.

Show	all communication			Name	0	or about	Torrest and the second	Entity		Q
1000	all communication	s •		Name	Q	or about	Type of entity •	Entity		4
oetween	dd/mm/yyyy	and dd/mm/yy	vyy and	I which include			in the description.		[clear]	Search
	Subject	From		То	On		Descript	ion	Is Compl	aint
										~
	Sc.		Aa	03/0	05/2001					^
A	Sc		Αē	03/0	05/2001					1
	Ne		C.	16/0	05/2001					
A		in the second	¢.		05/2001					~
<pre>A</pre>	Sc		Αε,	03/	10/2001					
Showing 1 -	101 of 480								< prev   next	>
create new c	ommunication ]									
Inbound	• All	on dd/mr	n/yyyy @	15:36 abou	t Type of entity	• E	ntity	Q Complaint		
Description	6							Mins spent		+
Address	sing Details									
Audress			_							
	From				То			Cc		
>Content		intractor   remove	1 [	add me   add perso	on   add contracto	r   removi	s] [add me	e   add person   add cor	ntractor   remo	ive ]
	s	intractor   remove	1 1	add me   add perso	on   add contracto	r   removi	e] [add me	e   add person   add cor	ntractor   remo	ive ]
>Content	s	intractor   remove	1 [	add me   add perso	on   add contracto	ir   removi	e] [add mo	e   add person   add cor	ntractor   remo	ive ]

- 3. Select a communication type from the leftmost drop-down menu. The available options are **Inbound** and **Outbound**.
- 4. Select a communication method from the **Email** menu. The available options are **All**, **Email**, **Telephone**, **SMS**, **Fax**, **Letter** and **Other**.
- 5. Enter the date and time that the communication was received into the **on** and @ fields.
- 6. Select the subject of the communication:
  - a. Select a subject type from the **Type of entity** menu. The available options are **person** and **contractor**.
  - b. Click the **Entity** browse. Either the **Select a person** or **Select Contractor** dialog is displayed, depending on the option you selected.
  - c. Enter search criteria and then Select the desired person or contractor.
- 7. If required, select the **Complaint** check box. Selecting the **Complaint** check box displays the **Complaint Details** section further down the page.

- 8. Enter a **Description** for the communication. Note that this field should contain a description of the communication, rather than the actual content of the communication.
- 9. Enter the number of **Mins spent** on the communication.
- 10. Ensure that the **Addressing Details** section is open. Enter sender and recipient details into the **From**, **To** and **Cc** sections. Each of these sections is managed using the same set of functions:

✓Addressing Details		
From	То	Cc
[ add me   add person   add contractor   remove ]	[ add me   add person   add contractor   remove ]	[ add me   add person   add contractor   remove ]

- **add me:** Adds the One username that you are signed in with to the section.
- add person: Opens the Select a person dialog.
- **add contractor** Opens the **Select Contractor** dialog.
- **remove:** Removes any person details from the section.
- 11. Open the **Contents** section and enter the **Subject** and **Body** of the communication.

✓ <u>Contents</u>	
Subject	Subject of email, letter, fax, phone call etc
Body	You can paste contents of communication here

12. If applicable, open the **Response** section and enter details of the required response to the communication:

ſ	Response						
	Referred to or response required from	Select a person	<b>QX</b>	by	dd/mm/yyyy	Completed on	dd/mm/yyyy
- L			,				

- a. Click the **Referred to or response required from** browse to open the **Select a person** dialog.
- b. Search for the person who should respond to the communication and then click the **Select** button to select that person.
- c. Enter a valid date into the by field. This is the date that the person should respond by.
- d. Once the person has responded, enter the date of their response into the Completed on field
- 13. If the communication is a complaint, fill out the **Complaint Details** section:

✓ <u>Complaint details</u>		
Type of complaint	Please select	• +
Type of action	Please select	• +
Appealed to LA on	dd/mm/yyyy with outcome	Please select 🔻
Appealed to law on	dd/mm/yyyy with outcome	Please select 🔻
Minutes spent		

- a. Select a Type of complaint.
- b. Select a Type of action. This is the action that was taken as a result of the complaint.
- c. If applicable, enter a date into the Appealed to LA on and with outcome fields.
- d. If applicable, enter a date into the Appealed to law on and with outcome fields.
- e. Enter the number of Minutes spent on the complaint.
- 14. Click the **Save** button to save the communication.

# **Recording a Follow-Up Communication**

- 1. Select a communication. For more information on selecting communications, see <u>Selecting a</u> <u>Communication</u> on page *69*.
- 2. Click the create follow-up communication hyperlink.

how	all communit	cations 🔻 🗌	Name Name	Q or about	Type of entity   Entity	٩
etween	dd/mm/yyyy	and dd/mm/yyy	/y and which include	9	in the description.	[clear] Search
	Subject	From	То	On	Description	Is Complaint
✓ Ał		S	Ai	03/05/2001		
At	-	S	Aa	03/05/2001		
AŁ	100	N	C	16/05/2001		
At	0.000	N	0	16/05/2001		
At	10.001	S	Aa	03/10/2001		
bowing 1	- 101 of 482					< prev   next >

3. Enter the details of the follow-up communication. For more information on creating communications, see <u>Recording a Communication</u> on page 71.

# Selecting a Follow-Up Message

- 1. Select a communication. For more information on selecting communications, see <u>Selecting a</u> <u>Communication</u> on page 69.
- 2. Click the **search for follow-up messages** hyperlink. A list of the selected communication's follow-up messages is displayed.

all con	munications 🔻	Name	Q or about	Type of entity	٩
tween dd/mn	n/yyyy and dd/mm/	yyyy and which inclus	de	in the description.	[clear] Search
Subject	From	То	On	Description	Is Complaint
🖌 At	Similar	Ai	03/05/2001		
At	S	Aa	03/05/2001		
At	N	0	16/05/2001		
At	N	¢.	16/05/2001		
At	S	A	03/10/2001		
A nowing 1 - 101 of 48	2				<pre> / next &gt;</pre>

3. Highlight a message to select it.

# **Deleting a Communication**

- 1. Select a communication. For more information on selecting communications, see <u>Selecting a</u> <u>Communication</u> on page *69*.
- 2. Click the delete communication hyperlink. A confirmation dialog is displayed.

	lultiple passengers Bulk	transfer		
how all com	From T	o Cc	Q or about Type of entity -	Entity
dd/mm	yyyy and dd/mm/yyyy	and which include	in the description.	[clear] Searc
Subject	From	To O	n Description	Is Complaint
	In the owners in the	02/02/2	2017 cccc	
	print and the second second	:02/02/2	017 letter	
		24/07/2	2014 TL - test Draft	
	The second s	22/07/2	014 ARCDEL Provider1 communication lo	og 🗌
]		15/07/2	2014 fdf	

3. Click the **Delete** button to delete the communication.

# **Managing the Access Control List for Communications**

One Transport features an Access Control List for communications, allowing you to restrict access to a given communication to a specific user or group.

#### Adding a User/Group to the ACL

- 1. Select a communication. For more information on selecting communications, see <u>Selecting a</u> <u>Communication</u> on page 69.
- 2. Click the set ACL hyperlink. The Access Control List dialog is displayed.

	Access Control List	
Comment		
Name of user or gro	oup Acces	s rights granted
No records to view		< prev   next >
	For users in more than one group	< prev   next >     "Allow" takes priority
No records to view [ add user/group   remove user/group ]	For users in more than one group	

3. Click the add user/group hyperlink. The Name of user or group list is displayed.

Access Control List	
oup Acce	ess rights granted
	< prev   next >
For users in more than one group	"Allow" takes priority •
	Search
	лир Асси

- 4. Enter the name of the user/group you want to add into the search bar and then click the **Search** button. A list of users and groups that match your search criteria is displayed.
- 5. Highlight the user/group you want to add and then click the **Add** button to add that user/group to the list.

#### **Editing a User Group's Communication Access Rights**

- 1. Select a communication. For more information on selecting communications, see <u>Selecting a</u> <u>Communication</u> on page *69*.
- 2. Click the Set ACL hyperlink to display the Access Control List dialog.
- 3. Highlight the user/group you want to edit.

	Access Control List	
Comment		
Name of user or gr	roup Acces	s rights granted
B2BS Schools	deny any access	
View 1 - 1 of 1 [add user/group   remove user/group ]	For users in more than one group	< prev   next >     "Allow" takes priority
[ add user/group   remove user/group ]		
	For users in more than one group deny any access	
[ add user/group   remove user/group ]		

- 4. Select the user's/group's new access level from the menu at the bottom of the dialog. There are four options:
  - deny any access
  - can read summary only
  - can read summary and details
  - allowed full access.
- 5. Click the **Save** button to confirm your changes.

**NOTE:** Some users may be in more than one ACL group. You can specify how One deals with access conflicts by selecting an option from the **For users in more than one group** drop-down menu. The available options are **"Allow" takes priority** and **"Deny" takes priority**.

#### Removing a User/Group from the ACL

- 1. Select a communication. For more information on selecting communications, see <u>Selecting a</u> <u>Communication</u> on page 69.
- 2. Click the set ACL hyperlink to display the Access Control List.
- 3. Highlight the user/group you want to delete.
- 4. Click the remove user/group hyperlink to remove the user or group from the ACL.

# **04** | Maintaining Routes and Stops

The **Operations** area of One Transport enables you to create, edit and delete routes and stops. Once configured, routes and stops are used as the basis for passenger journeys.

All routes and stops in One Transport v4 have **Start** and **End Dates**. These date fields enable you to enter details of a future stop change.

For example, suppose you know that one stop is due to replace another on July 15<sup>th.</sup> In this case you could create the new stop ahead of time, setting its **Start Date** to the 15<sup>th</sup>, before setting the **End Date** of the old stop to July 14<sup>th</sup>.

# **Managing Stops**

The **Operations | Stops** page enables you to view and manage stops within One Transport.

You must select a stop before you can edit its details. Once you have selected a stop the following tabs become available:

- **Details** enables you to view and edit a stop's basic details, such as its name and location.
- Boarding and alighting enables you to view a list of the passengers who board and alight at the selected stop.
- **Routes** enables you to view a list of the routes that use the stop.
- Map enables you to view the stop on a map.

# **Selecting a Stop**

- 1. Select the **Operations** area.
- 2. Ensure that the **Stops** page is selected. Stop selection fields are displayed.

Stops Ro	utes Contractors	Contracts	Bulk contract renewal
Description			
Address			
Route	route	Q. <b>X</b>	
Stop type	All	•	
Route type	All	• )	
Area	All	• )	Details Boarding & alighting Routes Map
Dates	Current	•	
	Le	lear] Search	

- 3. Enter search criteria for the stop you want to select. You can enter the following criteria:
  - Description
  - Address
  - **Route:** Returns stops that are served by a particular route.
  - Stop type: Enables you to select from Wayside with address, Roadside with coords, Base, Student/client addresses or All stops.
  - Route type: Returns stops that are associated with routes of a particular type. You can select from Network, Standard or All routes.
  - Area: Returns stops that are located in a particular town or city.
  - **Dates**: Enables you to select **Current**, **Past**, **Future** or **All** stops.

All selection fields are optional. Clicking the **Search** button without entering any search criteria returns a list of all stops in One.

4. Click the **Search** button to display a list of stops that match the entered search criteria.

**NOTE:** Click the **export** hyperlink at the bottom of the list to export the returned search results into a spreadsheet file.

5. Highlight the stop you want to view.

**NOTE:** One Transport displays the number of results matching the entered search criteria at the bottom of the search panel. However, Access Control List (ACL) restrictions are applied in-between the search being completed and the results being displayed. Therefore, the number of results visible on screen may not match the given number of results, depending on the ACLs applicable to your One user ID. For more information on ACLs in One see the RG\_ACL\_ACL Definition reference guide, available from www.onepublications.com and My Account.

# **Creating a Stop**

- 1. Select the **Operations** area.
- 2. Ensure that the **Stops** page is selected.
- 3. Click the **Search** button to display a list of current stops.
- 4. Click the create new stop hyperlink to display editable fields related to stop details.

Stop type	All	Details Boa	rding & alighting Routes Map	
Route type	All	Stop type	Wayside with address •	
Area	All	Route type	Standard •	
Dates	Current	Area code	Select Operational Area 🔻	
	[clear] Search	Description	Enter description	*
Description	Туре	Stop Address		Q <b>X</b>
1(	^	Start date	dd/mm/yyyyy	
10 10 10 10		End date	dd/mm/yyyy	
3:	NACINE STREET			[cancel] Save

- 5. Select a **Stop Type**. There are five stop types available in Transport: **Wayside with address**, **Roadside with coords**, **Base**, **Student address** and **Client/person address**.
- 6. Select a Route Type.
- 7. Select an operational area for the stop from the Area Code field.
- 8. Enter a **Description** for the stop.
- 9. If you selected **Wayside with address** from the **Stop type** menu, select an address for the stop:
  - a. Click the Stop address browse to display the Choose an address dialog.
  - b. Enter a postcode or address line into the search bar and then click the **Search** button to search for matching addresses.
  - c. Highlight an address and then click the **Select this address** button to select the address and close the dialog.
- 10. If you selected **Roadside With Co-ords** from the **Stop Type** menu, enter the **Easting** and **Northing** values for the stop as required.

**NOTE:** Easting and Northing are geographic coordinates that identify a particular point on a map.

Stop type	All	Details B	parding & alighting Routes Map	
Route type	All	Stop type	Roadside with coords 🔹	
Area	All	Route type	Standard 👻	
Dates	Current 💌	Area code	Select Operational Area 🔻	
	[clear] Search	Description	Enter description	*
Description	Туре	Easting		
1	^	Northing		
1		Start date	dd/mm/yyyy	
3	and an approximately seeming	End date	dd/mm/yyyy	
4 A	A REAL PROPERTY AND A REAL			[cancel] Save

#### 11. If you selected **Base** from the **Stop Type** menu:

Stop type	All	Details Boa	arding & alighting Routes Map	
Route type	All	Stop type	Base	
Area	All	Route type	Standard •	
Dates	Current	Area code	Select Operational Area 🔻	
	[clear] Search	Description	Enter description	*
Description	Туре	Stop Address	1	Q <b>X</b>
1	^	Base	Select a base	Q.¥.*
t i		Site	Nothing selected	•
		Start date	dd/mm/yyyy	
	an barran an an an	End date	dd/mm/yyyy	
4	1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1			[cancel] Save

- a. Select an address for the stop:
  - i. Click the Stop Address browse to open the Choose an address dialog.
  - ii. Enter a postcode or address line into the search bar and then click the **Search** button to search for matching addresses.
  - iii. Highlight an address and then click the **Select this address** button to select the address and close the dialog.
- b. Select the base that is associated with the stop:
  - i. Click the Base browse to display the Choose a base dialog.
  - ii. Enter search criteria and then click the **Search** button to view a list of bases that match the entered criteria.
  - iii. Highlight the desired base and then click the **Select this base** button to select the base and close the browse.
- c. Select a Site for the selected base.
- 12. If you selected Student Address from the Stop Type menu:

Stop type	All	Details Boa	rding & alighting Routes Map	
Route type	All	▼ Stop type	Student address	
Area	All	Route type	Standard 👻	
Dates	Current	Area code	Select Operational Area 🔻	
	[clear]	Search Description	Enter description	*
Description	Туре	Stop Address		Q ¥
1		A		* Q <b>X</b>
1		Home address		Q
3	CALIFORNIA AND	Start date	dd/mm/yyyy	
4: A		End date	dd/mm/yyyy	
A				[cancel] Save

a. Select an address for the stop:

- i. Click the Stop Address browse to open the Choose an address dialog.
- ii. Enter a postcode or address line into the search bar and then click the **Search** button to search for matching addresses.
- iii. Highlight an address and then click the **Select** button to select the address and close the dialog.
- b. Select a student:
  - i. Click the Student browse to open the Select a student dialog.
  - ii. Enter search criteria and then click the **Search** button. A list of students who match the entered criteria is displayed.
  - iii. Highlight a student and then click the **Select** button to select the student and close the dialog.
- c. Select the student's home address:
  - i. Click the Home address browse to open the Choose an address dialog.
  - ii. Enter a postcode or address line into the search bar and then click the **Search** button to display matching addresses.
  - iii. Highlight an address and then click the **Select this address** button to select the address and close the dialog.
- 13. If you selected Client/ Person Address from the Stop Type menu:

Stop type	All	•	Details Boo	rding & slighting Routes Map	
Route type	All	•	Stop type	Client/person address 🔻	
Area	All	•	Route type	Standard 👻	
Dates	Current	*	Area code	- Select Operational Area •	
	[ cle	ar] Search	Description	Enter description	•
Description	Th	rpe	Stop Address		0.8
100 0000 00000		^	Client/Person		* Q X
1	ACCESS 10	-	Home address		Q
3		1 m 1	Start date	ddimnvyyyy	
4	and the second se		End date	dammiyyyy	
A					cancel ] Save

- a. Select an address for the stop:
  - i. Click the Stop Address browse to open the Choose an address dialog.
  - ii. Enter a postcode or address line into the search bar and then click the **Search** button to display matching addresses.
  - iii. Highlight an address and then click the **Select this address** button to select the address and close the dialog.
- b. Select a person:
  - i. Click the Client/Person browse to open the Select a person dialog.
  - ii. Enter search criteria then click the **Search** button to display a list of matching people.
  - iii. Highlight a person and then click the **Select** button to select the person and close the dialog.
- c. Select the person's home address:
  - i. Click the Home address browse to open the Choose an address dialog.
  - ii. Enter a postcode or address line into the search bar and then click the **Search** button to display matching addresses.
  - iii. Highlight an address and then click the **Select this address** button to select the address and close the dialog.

- 14. Enter a valid Start date and End date for the stop's use.
- 15. Click the **Save** button to save your changes.

# **Editing Stop Details**

- 1. Select a stop. For more information on selecting stops, see Selecting a Stop on page 76.
- 2. Ensure that the Details tab is selected. Editable fields related to the stop are displayed.

Stop type	All 🔻	Details Boa	arding & alighting Routes Map	
Route type	All	Stop type	Wayside with address 🔹	
Area	All	Route type	Standard 👻	
Dates	Current •	Area code	Select Operational Area 💌	
	[clear] Search	Description	Abbey Middle School	*
Description	Туре	Stop Address		Q. #
1	Address			
1	Address	Start date	dd/mm/yyyy	
1	Address	End date	dd/mm/yyyy	
3	Address			[cancel] Save
				[ cancer ]

- 3. Make the required changes.
- 4. Click the Save button to save your changes.

# **Deleting a Stop**

- 1. Select the stop you want to delete. For more information on selecting stops, see <u>Selecting a</u> <u>Stop</u> on page 76.
- 2. Click the **delete stop** hyperlink. A confirmation dialog is displayed.

Stop type	All	• )	Details Bo	arding & alighting Routes Map	
Route type	All	•	Stop type	Wayside with address 🔻	
Area	All	•	Route type	Standard -	
Dates	Current	•	Area code	Select Operational Area 💌	
		[clear] Search	Description	Abbey Middle School	*
Description		Туре	Stop Address		Q <b>X</b>
10 10 10		s A	Start date	dd/mm/yyyy	
1		s			
3	an address of		End date	dd/mm/yyyy	_
4.		s		[c	ancel] Save
A		e			
A					
A		in the second			
A		100			
		_			
A		100			
A					
A	and the set of the	s			
A	101 - 100	e			
A	and the second	5			
A					
A		s			
B	Contraction of the local division of the loc	-			
		The state			
B					
В					
Showing 1 - 10	0 of 190	< prev   next >			
[ create new stop	delete stop export ]				

3. Click the **Delete** button to delete the stop.

**NOTE:** You can only delete stops that are not currently in use on a route. For more information on removing stops from a route, see <u>Editing the Stops on a Route</u> on page 87.

# Viewing Passengers Boarding or Alighting at a Particular Stop

- 1. Select a stop. For more information on selecting stops, see Selecting a Stop on page 76.
- 2. Select the **Boarding & alighting** tab. A list of the passengers who board or alight at the stop is displayed.

[one]	Processes	s People	Operations	Utilities	Admin		elcome 🕯			Help	C	hange Passwor	d   Logo
Stops	Routes	Contractors	Contracts	Bulk contra	act renewal								
Descriptio	n (			Abb	ey Middle S	chool							
Address													[ actions ]
Route		oute	Q. <b>X</b>	-									
Stop type		All	• ]	Details	Boarding &	alighting Ro	utes	Мар					
Route type	e 💭	All	• )	Show o	nly Passeng	ier name	or	Current		•		[ show al	I] Refresh
Area		All	•	Name	÷	Туре	Route			From		Until Boar	d/Alight
Dates		Current	•	100.00	A COMPANY	S	SYS-R2	- System Ar	ic - Tes	02/07/20	14	В	
			[clear] Search			S	SYS-R2	- System Ar	c - Tes	02/07/20	14	A	

 If required, enter a Passenger name and select whether you want to search for Current, Past, Future, Current and Future or All passengers. Click the Refresh button to filter your search results.

# Viewing the Routes Associated With a Stop

- 1. Select a stop. For more information on selecting stops, see <u>Selecting a Stop</u> on page 76.
- 2. Select the **Routes** tab. A list of the routes that the selected stop is included in is displayed.

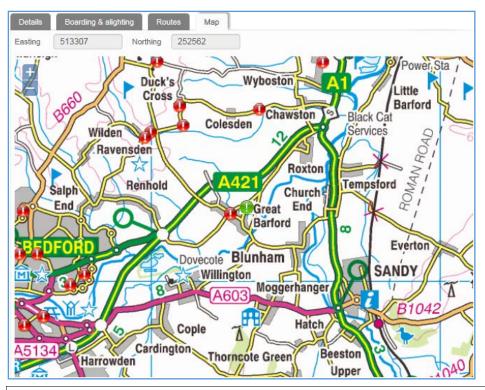
[one]	Processes	People	Operations	Utilities A	vdmin.	Welcome SY		l Help		Change F	assword	Logout
Stops	Routes	Contractors	Contracts	Bulk contrac	t renewal							
Descriptio	n			Abbey	/ Middle School							
Address				)								[actions ¥]
Route	ro	ute	Q. <b>X</b>									
Stop type	AI	1	•	Details	Boarding & alighting	Routes	lap					
Route type	A	I	<b>~</b>	Show only	Route code or desc	ription	tep dates	Current		•	[ show all ]	Refresh
Area	AI	1	÷	Code	Description	Ту	pe Opera	ational Area	Veh	icle		
Dates	Ci	urrent	•	000002	Brickhill to Grange Sch	ool (Tail-Lift S			TL4	- Tail-Lift N	1inibus (4 se	ater)
	10000			CHERYL	Test	S						
			[clear] Search	EXTRA1	Extra Route	S						

 If required, enter a Route code or description and select whether you want to search for Current, Past, Future, Current and Future or All routes, Click the Refresh button to filter your search results.

# Viewing a Stop on a Map

This tab is only available to authorities that have the GISv4 licence.

- 1. Select the stop you want to view. For more information on selecting stops, see <u>Selecting a Stop</u> on page 76.
- 2. Select the **Map** tab. A map displaying the stop's location is displayed. The selected stop is displayed in green, with other stops displayed in red.



NOTE: To geocodes in the Map tab, drag and drop the stop's icon.

# **Maintaining Routes**

The **Operations | Routes** page enables you to view and manage routes within One Transport.

There are three types of route in One Transport: Standard, Network and Door-to-Door.

A standard route is a route on which the LA have supplied a "school bus"; that is, employed a contractor to supply vehicles with which to service an LA-specified route.

A network route is an existing commercial, scheduled road or rail route. The LA buys passes to enable transport using these routes.

On a door-to-door route, the LA supplies transport to pick up a passenger at a specific address or stop and then take that passenger to another address or stop.

You must select a route before you can view or edit its details. Once you have selected a route the following tabs become available:

- Details enables you to view and edit basic details for a route, including contract details and vehicle types.
- **Stops** enables you to view and define the stops that make up a route.
- Loading enables you to view capacity information for a route and see how many passengers and assistants board or alight at each stop.
- **Passengers** enables you to view the passengers who use the selected route.
- Drivers & Assistants enables you to view and edit the drivers/assistants who work on the selected route.
- **Surveys** enables you to add and view survey details relating to the route.
- **Map** enables you to view the selected route on a map.

# **Selecting a Route**

1. Select the **Operations** area and select the **Routes** page. Search fields relating to route details are displayed.

[one]	Processes	People	Operations	Utilities	Admin	Welcome		He	lp	Change Password	Logou
Stops	Routes	Contractors	Contracts	Bulk cor	tract renewal						
Code				1							
Description	n []										
Base	Schools	5	Q×	Det	ails Stops Lo	ading Passengers	Drivers &	& assistants	S	urveys Map	
Туре	All type:	8	•								
Area	All		•								
Dates	Current		•	0							
			[clear] Search								

- 2. Enter search criteria for the route you want to select. You can enter the following criteria:
  - Code.
  - Description.
  - Base: Returns routes which include the selected base.
  - **Type:** Select from All types, Standard, Network and Door-to-door.
  - Area: Returns routes within the specified area.
  - Dates: Select from All, Current, Past or Future routes.

All selection fields are optional. Clicking the **Search** button without entering any search criteria returns a list of all routes in One.

3. Click the **Search** button to display a list of routes that match the entered search criteria.

**NOTE:** To export the returned search results into a spreadsheet file, click the **export** hyperlink at the bottom of the list.

4. Highlight the route you want to view.

**NOTE:** One Transport displays the number of results matching the entered search criteria at the bottom of the search panel. However, Access Control List (ACL) restrictions are applied in-between the search being completed and the results being displayed. Therefore, the number of results visible on screen may not match the given number of results, depending on the ACLs applicable to your One user ID. For more information on ACLs in One see the RG\_ACL\_ACL Definition reference guide, available from www.onepublications.com and My Account.

# **Creating a Route**

- 1. Select the **Operations** area and select the **Routes** page.
- 2. Click the **Search** button to display a list of current routes.
- 3. Click the **create new route** hyperlink to display editable fields related to route details.

Description								
		QX	Details Stop	s Loading P	assengers Di	rivers & assistants	Surveys Map	
Base	Schools	4.4	Code		*	Start date	dd/mm/yyyy	
Туре	All types	•						
Area	All	•	Description		*	End date	dd/mm/yyyy	
Dates	Current	•	Route type	Standard	•	Passengers	0	
		[clear] Search	Operational area	Select Operati	onal Area 🔻	Journeys	2	
Code	Description	Area	Frequency			Distance	0.000	
1	BR-Route1		•	MTWTF	SS	Memo 🕂	Additional Memo	
10	BR-Route10 - DTD				0.11		- admondration of	
11	BR-Route11 -NW		Company name		d #	[contact details]		
1234	we	BED	Туре	Select Type	•			
1443	door test	BED						
2	BR-Route2		> Udf					
234	an							
2345	test11							[cancel] Save
3	BR-Route3		> Contracts					
4	BR-Route4							
5	Br-Route5	LBUZ	> Vahiolas					
56566	hjhk		> Vehicles					
567	test							
6	BR-Route6							
7	BR-Route7							
8	BR-Route8							
9	BR-Route9							
ARCRT1	ARCDEL Route1							
BDCC01	Bedford Day Care Cer	ntre - RcBED						
BR_BT1	BR-BT1	BED						
BR-123	BR-123	LUD						
BRDtD	BRDtD	SHRE						
brrr	brrr							
BR-SS	BR-SS	BED						
BR-SS2	BR-SS2	BED	~					
Showing 1 - 8	86 of 86	< prev   next >						

- 4. Enter a **Code** for the route.
- 5. Enter a **Description** for the route.
- 6. Select the Route type. The available options are Standard, Network and Door to door.
- 7. Select Operational area and Frequency as required.
- 8. Enter Start date, End date, Journeys, and Distance information as required.

**NOTE:** The (number of) **Passengers** field cannot be edited manually. The value of this field is automatically calculated as passengers are added to the route.

9. If you do not intend to associate a full contract with the route, you can add a company name and type to the route:

**NOTE:** If you add a **Company name** and **Type** here, the details will be hidden if you later associate a contract with the route.

a. Click the **Company name** browse to display the **Select Contractor** dialog.

	Select Contrac	ctor	
	Active	[Clear Search]	
Company Name	Contact	Telephone	Active
A1 Cars	Mail	0	☑ .
ani10	te		₩ ^
mi131	acil		
Archer Carrs	Hug r	41000	2
Arrow Travel	Joli III	8	
isa	85))		
Auckland Taxis	Jo	8	
Sailey Travel	Characteristic	9	
Barton Private Hire	Jo	0	2
Bernie's Taxis	De	2	× 12
Showing 1 - 71 of 71	4.00 (BOOK)	< pres	ca   next >

- b. Enter the name of the contractor into the **Search with company name** field and then click the **Search** button to display a list of matching contractors.
- c. Highlight the contractor you want to select and then click the **Select** button to select the contractor and close the browse.
- d. If required, select a contractor type from the Type menu.
- 10. If required, add a contract to the route via the **Contract** section. The **create contract** hyperlink displays the **Create new contract** page with the **Route** field pre-populated. For more information on creating a contract, see <u>Creating a Contract</u> on page *110*.
- 11. If required, add vehicle details. For more information, see <u>Adding a Vehicle to a Route</u> on page *86*.
- 12. Click the Save button to save your changes.

# **Editing a Route**

The **Operations | Routes | Details** tab is divided into three sections. The topmost section enables you to edit the route's basic details, while the **Contracts** section enables you to view the contract details that apply to that particular route. Lastly, the **Vehicles** section enables you to add or remove vehicles from a route.

#### **Editing Route Details**

- 1. Select a route. For more information on selecting routes, see <u>Selecting a Route</u> on page 83.
- 2. Ensure that the **Details** tab is selected. Editable fields related to the route's details are displayed.

[one] F	Processes People	Operations	Utilities Admin	Welcome SY	SADMIN   Help	Change Passwor	d   Logout
Stops	Routes Contractors	Contracts	Bulk contract renewal				
Code			RAIL1 - Virgi	n Railways			
Description							
Base	Schools	Q. <b>X</b>	Details Stops	Loading Passengers	Drivers & assistants	Surveys Map	[actions ¥]
Туре	All types	•					
Area	All	•	Code	RAIL1 *	Start date	01/09/1995	
Dates	Current	•	Description	Virgin Railways	* End date	dd/mm/yyyy	
		[clear] Search	Route type	Network	<ul> <li>Passengers</li> </ul>	1	
Code	Description	Area	Operational area	Select Operational Area	<ul> <li>Journeys</li> </ul>	2	
N_01	TR-N/W Route1	BED	Frequency				
N001	T123			MIWIE 33	Memo 🕂	Additional Memo	
new route	new routes	BED					
NEW012	Newland Primary Schoo	ol					[cancel] Save
RAIL1	Virgin Railways						[cancer] Save
RISK	Risk Assessment		> Contracts				
SAMP	samp						
SHAR1	Clapham, Milton Ernest	to Shi SHAR	> Vehicles				
0114040			•				

- 3. Make the required edits.
- 4. Click the Save button to save your changes.

**NOTE:** There is an SQL script template available that enables you to convert standard routes to door-todoor routes. If required, contact the One Application Support Desk to request the script, referencing KB article KB-423312.

#### Viewing Route Contract Details

- 1. Select a route. For more information on selecting routes, see <u>Selecting a Route</u> on page 83.
- 2. Ensure that the **Details** tab is selected.
- 3. Open the **Contracts** section to view the following information about the route's contract:

- Company Name
- (Date) From
- (Date) Until
- Daily cost
- Passenger assistant cost
- 4. Optionally, click the **all contract details** hyperlink to open the **Operations | Contracts** screen with the route's contract selected.
- 5. Optionally, click the **contract history** hyperlink to search for all the route's previous contracts in the **Operations | Contracts** screen.

**NOTE:** If the selected route does not have a contract associated with it, the **create contract** hyperlink is displayed in the **Contracts** section. Click this link to open the **Operations | Contracts | create new contract** page in a new window. For more information on creating contracts, see <u>Creating a Contract</u> on page 110.

#### Adding a Vehicle to a Route

- 1. Select a route. For more information on selecting routes, see Selecting a Route on page 83.
- 2. Ensure that the **Details** tab is selected.
- 3. Open the Vehicles section to display a list of the vehicles that are currently used on the route.
- 4. Click the **add vehicle** hyperlink to display editable fields related to vehicle details.

4	BR-Route4		✓ Vehicles
5	Br-Route5	LBUZ	
56566	hjhk		From Until Registration Type / Description Contractor
567	test		
6	BR-Route6		[add vehicle   remove vehicle ]
7	BR-Route7		
8	BR-Route8		From 01/01/2014 until dd/mm/yyyy
9	BR-Route9		Contractor BR-Contractor1-Pisdn't use QX Reg Type Select from
ARCRT1	ARCDEL Route1		Description
BDCC01	Bedford Day Care Cent	re - RcBED	
BR_BT1	BR-BT1	BED	Capacities (seated) (standing) (wheelchairs) (max with max wheelchairs)
BR-123	BR-123	LUD	

- 5. Enter From and until dates as required.
- 6. Select the contractor that operates the vehicle:
  - a. Click the Contractor browse to display the Select Contractor dialog.

	Active		
		[Clear Search]	Search
Company Name	Contact	Telephone	Active
1 Cars	Ma	0	<b>V</b>
ani10	te		
ani131	an		<b>V</b>
Archer Carrs	Hurr	4	$\checkmark$
Arrow Travel	Jo	8	<b>~</b>
isa	as		$\checkmark$
Auckland Taxis	Jo	8	$\checkmark$
Bailey Travel	Ch	9	$\checkmark$
Barton Private Hire	Jo	0	<b>~</b>
Bernie's Taxis	Be	2	<ul> <li>✓</li> </ul>
Showing 1 - 71 of 71	1.	<pre>&lt; prev</pre>	next >

- b. Enter the name of the contractor into the search field and then click the Search button.
- c. Highlight the contractor and then click the **Select** button to select that contractor and close the dialog.

- 7. Select a vehicle Type. You can select a vehicle's type in two ways:
  - If you know the vehicle's registration, select it from the **Reg** drop-down menu. Selecting a registration will automatically switch the **Type** field to the correct vehicle type. You cannot edit the **Type** field if you have selected a registration.

**NOTE:** The vehicle must be listed as part of the contractor's fleet in order for you to select it from the **Reg** menu. For more information on adding vehicles to a fleet, see <u>Managing a Contractor's</u> <u>Individual Vehicles</u> on page 103.

- If you do not know the vehicle's registration, leave the **Reg** field blank and select the vehicle's **Type** from the drop-down menu.
- 8. If required, enter a **Description**.
- 9. Click the **Save** button to add the vehicle to the route.

#### Removing a Vehicle from a Route

- 1. Select a route. For more information on selecting routes, see <u>Selecting a Route</u> on page 83.
- 2. Ensure the **Details** tab is selected.
- 3. Open the **Vehicle** section to display a list of the vehicles that are currently used on the route.

.EE	State and State and State						
LEE7	Company Many Print	BED	<ul> <li>Vehicles</li> </ul>				
N_01		BED	From	Until	Registration	Type / Description	Contracto
N001	and the second se				Registration		
NDTD	CONTRACTOR OF ME		03/11/2014	03/11/2014		Double Decker (80 seater)	Arrow Trave
NEE1	Contraction of the local division of the						
NEW012	and the state						
NNET	Committee and the second second						
r1							
RAIL1	and the second sec						
re			[ add vehicle   re	move vehicle ]			
re1	1.0						

- 4. Highlight the vehicle you want to remove and click the **remove vehicle** hyperlink. A confirmation dialog is displayed.
- 5. Click **Yes** to delete the vehicle.

### Editing the Stops on a Route

The Operations | Routes | Stops tab enables you to edit a given route's stop order.

Note that the **Operations | Routes | Stops** tab cannot be used to edit an individual stop's details. For more information on editing an individual stop, see <u>Editing Stop Details</u> on page *80*.

#### Adding Stops to a Route

- 1. Select a route. For more information on selecting routes, see <u>Selecting a Route</u> on page 83.
- 2. Select the **Stops** tab to view a list of the stops on that route.

Description									
Base	Schools	Q	c	Deta	ails Sto	ops Lo	ading Passengers Drivers & assistant	s Surveys Map	
							Step active between	10/10/2014 and	dd/mm/yyyy
Туре	All types	•		_					
4	A.II.				Step 💲	Time	Description	Valid from	Valid to
Area	All	•			1	07:50	Clapham, High Street Shops	01/09/1992	
Dates	Current	•			2	07:55	Clapham, RAE Club	01/09/1992	
		[clear] Searc			3	08:05	Milton Ernest, The Queens Head	01/09/1992	
			-		4	08:08	Milton Ernest, Garage	01/09/1992	
Code	Description	Area			5	08:25	Sharnbrook Upper School	01/09/1992	
LEE			^		6	15:30	Sharnbrook Upper School	01/09/1992	
LEE7	and the second	BED			7	15:47	Milton Ernest, Garage	01/09/1992	
N_01		BED			8	15:50	Milton Ernest, The Queens Head	01/09/1992	
N001					9	16:00	Clapham, RAE Club	01/09/1992	
New route					10	16:05	Clapham, High Street Shops	01/09/1992	
NEW012									

**NOTE:** The **Stops** tab is only displayed for standard and network routes. If you select a door-to-door route, the **Addresses/Stops** tab is displayed instead. You cannot add additional stops from the **Addresses/Stops** tab, because door-to-door journeys run directly from one location to another.

3. Click the **Insert Stops** hyperlink to display the **Insert Stops into route** dialog.

Insert	Stops int	to route	
Description			
Address			
Stop type	All	•	
Route type	All	•	
Dates	Current	•	
		[Clear] Search	1
Desc	ription	Туре	
107 Lloyd Str	eet South, Man	Address	
123		Address	
16 Church Ro	ad, Maulden, Bi	Address	
37 CHALFONT	ROAD, ALLERT	Address	
42 Elmsmere	Road, Manches	Address	
Abbey Middle	School	Wayside	$\sim$
Showing 1 - 100 o	f 206	< prev   next >	
		[Cancel] Inser	t

- 4. Enter search criteria and then click the **Search** button to display a list of matching stops.
- 5. Highlight the stop that you want to add and then click the **Insert** button to insert the stop into the route.

**NOTE:** Transport routes are optimised to work with up to 50 stops. Performance may be affected if you add more than 50 stops to a route.

#### **Re-Ordering the Stops on a Route**

- 1. Select a route. For more information on selecting routes, see <u>Selecting a Route</u> on page 83.
- 2. Select the **Stops** tab (or the **Addresses/Stops** tab for door-to-door routes) to display a list of the stops on that route.
- 3. Highlight a stop you want to move and then enter the step you want to move it to into the **Step** field. For example, to make a stop the fourth stop on the route, enter **4** into the **Step** field.

Description				De	atails S	tops Lo	ading Passengers Drivers & assistants	s Surveys Map
Base	Schools	0,1	×				Step active between	10/10/2014 and dd/mm/yyyy
Туре	All types	•	-					
			_		Step 💠	Time	Description	Valid from Valid to
Area	All	•			1	07:50	Clapham, High Street Shops	01/09/1992
Dates	Current	•			Þ	07:55	Clapham, RAE Club	01/09/1992
	[ cle	ar ] Searc	sh		3	08:05	Milton Ernest, The Queens Head	01/09/1992
Code					4	08:08	Milton Ernest, Garage	01/09/1992
Lode	Description	Area			5	08:25	Sharnbrook Upper School	01/09/1992
LEE	Lee Test Route		^		6	15:30	Sharnbrook Upper School	01/09/1992
LEE7	Leagrave Junior School	BED			7	15:47	Milton Ernest, Garage	01/09/1992
N_01	TR-N/W Route1	BED			8	15:50	Milton Ernest, The Queens Head	01/09/1992
N001	T123				9	16:00	Clapham, RAE Club	01/09/1992
New route	New route description				10	16:05	Clapham, High Street Shops	01/09/1992

4. Click anywhere outside the **Step** field. The list of stops reorders to place the edited stop in the step you specified.

Description				Det	ails S	tops	ading Passengers Drivers & assistant	s Surveys Map
Base	Schools	Q	ĸ				5	
Туре	All types	-					Step active between	10/10/2014 and dd/mm/yyyy
1300	All types				Step 💠	Time	Description	Valid from Valid to
Area	All	•	·		1	07:50	Clapham, High Street Shops	01/09/1992
Dates	Current		-		2	08:05	Milton Ernest, The Queens Head	01/09/1992
	[ ch	ear] Seard	-h		3	07:55	Clapham, RAE Club	01/09/1992
	-		-		4	08:08	Milton Ernest, Garage	01/09/1992
Code	Description	Area			5	08:25	Sharnbrook Upper School	01/09/1992
LEE	Lee Test Route		~		6	15:30	Sharnbrook Upper School	01/09/1992
LEE7	Leagrave Junior School	BED			7	15:47	Milton Ernest, Garage	01/09/1992
N_01	TR-N/W Route1	BED			8	15:50	Milton Ernest, The Queens Head	01/09/1992
N001	T123				9	16:00	Clapham, RAE Club	01/09/1992
New route	New route description				10	16:05	Clapham, High Street Shops	01/09/1992

- 5. If required, repeat step three for all the stops you want to re-order.
- 6. Click the **Save** button to save your changes.

#### Mirroring the Stops on a Route

- 1. Select a route. For more information on selecting routes, see <u>Selecting a Route</u> on page 83.
- 2. Select the **Stops** tab. A list of the stops on the journey is displayed.

**NOTE:** The **Stops** tab is only displayed for standard and network routes. If you select a door-to-door route, the **Addresses/Stops** tab is displayed instead. You cannot mirror stops from the **Addresses/Stops** tab, because door-to-door journeys run directly from one location to another.

3. Select the check boxes to select the stops you want to mirror.

#### Maintaining Routes and Stops

Code				LEE	E - Lee	Test R	oute			
Description										
Base	Schools	Q. <b>X</b>	12	Detai	ls S	tops Lo	ading Passengers Drivers & assistant: Step active between	s Sur	veys Map	dd/mm/yyyy
Туре	All types	•		_	Step 💠	Time	Description	10/10/2	Valid from	Valid to
Area	All	•		-	1	00:00	107 Lloyd Street South, Manche		08/10/2014	31/10/2014
Dates	Current	•			2	00:00	123		08/10/2014	31/10/2014
		slear] Search			6	00.00	120		00/10/2011	51/10/2011
Code	Description	Area								
AR	anu route	Al Cu								
ARCRT1	ARCDEL Route1		^							
CCC	Future Route with Route	map								
chk_route	chk_route									
DWBT2	Whitwick Green connection	on fo								
GA01	Green Abbey - MapInfo r	oute								
GRAN1	Brickhill to Grange Schoo	ol (Ta								
GRANHI	Grange Hill Primary									
LEE	Lee Test Route									
LEE7	Leagrave Junior School	BED								
N_01	TR-N/W Route1	BED								
N001	T123									
New route	New route description									
NEW012	Newland Primary School									
RAIL1	Virgin Railways									
RISK	Risk Assessment									
Route_From	Route_From	BED								
Route_To	Route_To	BED								
Route1	route1	BED								
SAMP	samp									
SHAR1	Clapham, Milton Ernest to									
SHAR10	Bolnhurst, Thurleigh, Ble									
SHAR11	Whitwick Green connection									
SHAR12	Riseley to Sharnbrook Up									
SHAR13	Shelton to Sharnbrook U	pper SHAR	~							
Showing 1 - 4	3 of 43 < ;	prev   next >	s	howi	ng 1 - 2 (	of 2				
[ create new ro	ute   duplicate route   delete ro	ute   export ]	1	insert	t stops   re	move stops	mirror stops   verify route ]			[ cancel ]

4. Click the **mirror stops** hyperlink to display the **Enter return stop time** dialog.



5. Enter the time that you want the mirrored journey to begin and then click the **OK** button to close the dialog and mirror the stops. All selected stops are duplicated in reverse step order.

**NOTE:** One Transport calculates the times for the stops on the return journey using the times recorded for the outbound journey.

Code			LE	E - Le	e Test Ro	oute		
Description			Do	tails	Stops	ading Passengers Drivers & assistants Sur	veys Map	
Base	Schools	Q. <b>X</b>	De	talls	stops Lo	Step active between 10/10/2		dd/mm/yyyy
Туре	All types	•						
Area	All	•		Step \$	Time 00:00	Description 107 Lloyd Street South, Manche	Valid from 08/10/2014	Valid to 31/10/2014
Dates	Current	•		2	00:00	123	08/10/2014	31/10/2014
		[clear] Search		3	01:00	123	08/10/2014	31/10/2014
Code	Description	Area		4	01:00	107 Lloyd Street South, Manche	08/10/2014	31/10/2014

#### Removing a Stop from a Route

- 1. Select a route. For more information on selecting routes, see <u>Selecting a Route</u> on page 83.
- 2. Select the **Stops** tab to display a list of the stops on that route.

**NOTE:** The **Stops** tab is only displayed for standard and network routes. If you select a door-to-door route, the **Addresses/Stops** tab is displayed instead. You cannot remove stops from the **Addresses/Stops** tab, because door-to-door journeys run directly from one location to another.

 Select the check box next to the stop you want to delete. You can select multiple stops at once if required.

. ,	rocesses People C Routes Contractors	Operations Contracts		Itilities Bulk co	Adr ntract re		Welcome Ar Control   Help   Change Password   Logo
Code				R	AIL1 -	Virgin	Railways
Description							
Base	Schools	Q	×	De	tails	Stops	Loading Passengers Drivers & assistants Surveys Map
							Step active between 13/03/2017 and dd/mm/yyyy
Туре	All types		•		Step	Time	Description Valid from Valid to
Area	All		•		1		Midland Road, Bedford, MK40 1PL
Dates	Current		-		2		Railway Station, Bedford, MK44 3SG
		lear 1 Sear			3	:	Clapham Junction
		-			4		Crystal Palace
Code	Description	Area			5	1	Harlington
N_01	TR-N/W Route1	BED	^		6	1.0	Hemel Hempstead
N001	T123				7		Hendon
new route	new routes	BED			8		Kings Cross
NEW012	Newland Primary School				9	1.0	Legrave
RAIL1	Virgin Railways				10	1	Luton
RISK	Risk Assessment				11	1	St Albans
SAMP	samp				12	1	St Pancras
SHAR1	Clapham, Milton Ernest to	ShiSHAR			13	1	Watford Junction
SHAR10	Bolnhurst, Thurleigh, Blet	soe SHAR					
SHAR11	Whitwick Green connection	on fo SHAR					
SHAR12	Riseley to Sharnbrook Up	per SHAR					
SHAR13	Shelton to Sharnbrook Up	per SHAR					
SHAR14	Yielden to Sharnbrook Up	per SHAR					
SHAR15	Oakley to S'bk US (Medic	al fo SHAR					
SHAR2	Clapham to Sharnbrook U	ppe SHAR					
SHAR3	Clapham to Sharnbrook U	lppe					
SHAR4	Oakley to Sharnbrook Up	per (SHAR					
SHAR5	Stevington and Pavenham	n to SHAR					
SHAR6	Turvey, Carlton, Harrold t	o Sł					
SHAR6	Turvey, Carlton, Harrold t	o SI SHAR					
SHAR7	Wymington and Podingtor	n to SHAR					
SHAR7	Wymington and Podingtor	n to					
SHAR8	Dean, M'Bourne, Knotting	, S'(SHAR					
SHAR9	Pertenhall, Ltl Staughton,	KeySHAR					
тва	To Be Advised		$\sim$				
Showing 1 - 3	32 of 32 < p	rev   next >		Sho	wing 1 ·	13 of 13	
Langeta norre-	oute   duplicate route   delete rou	to Loweet 1		11-1	ort store	Learning of	tops   mirror stops   verify route ] [cancel ] Sa

- 4. Click the **remove stops** hyperlink. A warning dialog is displayed.
- 5. Click the **Yes** button to delete the selected stop from the route.

# **Duplicating a Route**

The **Duplicate Route** function creates a new route with the same stops and steps as the copied route. The function does not copy the individual stop entities themselves.

- 1. Select a route. For more information on selecting routes, see <u>Selecting a Route</u> on page 83.
- 2. Click the duplicate route hyperlink to display the Duplicate route dialog.

	Duplicate route	
	Making a copy of route code GG1.	
New code	*	
Description	GG Route	) *
Help me tran	sfer passengers to the new route afterwards	
	[ cancel ] Duplicate	

- 3. Enter a **New code** for the duplicate route.
- 4. Enter a **Description** for the duplicate route.
- 5. If required, select the Help Me Transfer Passengers to the New Route Afterwards check box.

This check box opens the **Processes | Bulk Transfer** menu. For more information on using the Bulk Transfer menu, see <u>Bulk Transferring Journeys to a New Route</u> on page 40.

6. Click the **Duplicate** button to copy the route.

## Verifying a Route

It is possible to create a route with steps that are not in time order, enabling you to save routes in a partially finished state. However, finished routes must be in time order, with each step assigned a later time than the preceding step. Verifying a route confirms that the steps and times on the route are in the same order. A Verify Failed dialog displays if the steps and times are not in order.

- 1. Select the route you want to verify. For more information on selecting routes, see <u>Selecting a</u> <u>Route</u> on page *83*.
- 2. Select the **Stops** tab (or the **Addresses/Stops** tab for door-to-door routes). A list of the stops on the journey is displayed.

Description				_	_				
Base	Schools	Q	c	Deta	ils Sto	ops Lo	ading Passengers Drivers & assista Step active between	ID/10/2014 and	dd/mm/yyyy
Туре	All types		·	_	<b>C</b> 1 <b>t</b>	-			
Area	All				Step \$	Time	Description	Valid from	Valid to
			51		1	08:00	Riseley, Pippin's Wood	05/09/1991	
Dates	Current		·		2	08:05	Riseley, The Five Bells	05/09/1991	
	[ clea	r] Sean	:h		3	08:10	Riseley, Bourne End Road Sharnbrook Upper School	05/09/1991	
Code	Description	Area			5	15:30	Sharnbrook Upper School	05/09/1991	
LEE	Lee Test Route				6	15:40	Riseley, Bourne End Road	05/09/1991	
LEE7	Leagrave Junior School	BED	2		7	15:45	Riseley, The Five Bells	05/09/1991	
N 01	TR-N/W Route1	BED			8	15:50	Riseley, Pippin's Wood	05/09/1991	
N001	T123	500							
New route	New route description								
NEW012	Newland Primary School		10.1						
RAIL1	Virgin Railways								
RISK	Risk Assessment								
Route_From	Route_From	BED							
Route_To	Route_To	BED							
Route1	route1	BED							
SAMP	samp								
SHAR1	Clapham, Milton Ernest to S	h: SHAR							
SHAR10	Bolnhurst, Thurleigh, Bletso	e SHAR							
SHAR11	Whitwick Green connection	fo SHAR							
SHAR12	Riseley to Sharnbrook Uppe	r SHAR							
SHAR13	Shelton to Sharnbrook Uppe	r SHAR							
SHAR14	Yielden to Sharnbrook Uppe	r SHAR							
SHAR15	Oakley to S'bk US (Medical f	fo SHAR	_						
SHAR2	Clapham to Sharnbrook Upp	e SHAR							
SHAR3	Clapham to Sharnbrook Upp	e							
SHAR4	Oakley to Sharnbrook Upper	SHAR							
SHAR5	Stevington and Pavenham to	o SHAR							
SHAR6	Turvey, Carlton, Harrold to	si	$\checkmark$						
		SISHAR							

3. Click the **verify route** hyperlink to verify the route.

# **Deleting a Route**

- 1. Select a route. For more information on selecting routes, see <u>Selecting a Route</u> on page 83.
- 2. Click the **delete route** hyperlink. A warning dialog is displayed.
- 3. Click the **Delete** button to delete the route and close the dialog.

# **Viewing Route Loading Details**

- 1. Select the route you want to view. For more information on selecting routes, see <u>Selecting a</u> <u>Route</u> on page *83*.
- 2. Select the **Loading** tab to display a list of the stops on the route and the number of people boarding and alighting at each stop.

**NOTE:** The loading calculation takes into account the opening times of the base. If the base is not open on the selected date, One Transport will display zero loading values for all stops on the route.

# Viewing the Passengers who use a Specific Route

- 1. Select the route you want to view. For more information on selecting routes, see <u>Selecting a</u> <u>Route</u> on page *83*.
- 2. Select the **Passengers** tab. A table of the passengers who use the route and the stop that each passenger boards and alights at is displayed.

Description			Details	Stops Loading	Passer		& assistants	Surveys	Мар	
Base	Schools	Q.¥	Details	Stops Loading	Passel	ngers Drivers	& assistant	Surveys	мар	
Туре	All types	•	show only	passenger name	or from	10/10/2014	until	10/10/2014	Refresh	[actions ¥]
Area	All	•	Passenger	2 V		Boards At		Alights	At	
Dates	Current	•		Net 1		08:05 R	10. Mar 10	08:20 S		
Dates	ounoin		4			15:30 S	al secol	15:45 R	and the second	
		[clear] Search	4	and the second se		08:00 R		08:20 S		
Code	Description	Area	4	Real Property lies		15:30 S	-	15:50 R		

3. If required, enter a **passenger name** and select valid dates from the **from** and **until** fields. Click the **Refresh** button to filter your search results.

# Managing a Route's Drivers/Passenger Assistants

Assigning a Driver/Passenger Assistant to a Route

- 1. Select a route. For more information on selecting routes, see Selecting a Route on page 83.
- 2. Select the Drivers & assistants tab.
- 3. Click the **add a new driver or assistant** hyperlink to display editable fields related to driver and assistant details.

	[ cle	ar] Searc	:h										
Code	Description	Area		[ add new driver or a	ssistant   delete selected	driver or a	ssista	int]					
LEE	Lee Test Route		~										
LEE7	Leagrave Junior School	BED		Name						*Q <b>X</b>			
N_01	TR-N/W Route1	BED		Every			fror	m 10/10	)/2014	🔹 until dd/mm/yyyy			
N001	T123			Lvery		SS	1101		12014	until dd/mm/yyyy			
New route	New route description			Outward from	stop	QX	@	hh:mm	to	stop or base	Q. <b>X</b>	@	nh:mm
NEW012	Newland Primary School			Returning from	stop or base	Q×	@	hh:mm	to	stop	Q×	@	hh:mm
RAIL1	Virgin Railways			Returning norm	3100 01 0436		e	mann	10	Stop			
RISK	Risk Assessment										N	lemo	+
Route_From	Route_From	BED		> Udf									
Route_To	Route_To	BED											_
Route1	route1	BED										cance	I] Sav

- 4. Select the driver/assistant you want to add.
  - a. Click the Name browse to display the Select a Driver/Assistant dialog.

#### Maintaining Routes and Stops

Search for	Active drivers		•
Name	Any name character	S	
Contractor			Q.X
Person Id			
Postcode		Type Any	*
Base	Select a base		QX
Date of birth	dd/mm/yyyy		
Gender	Either		•
		Use contains ma	atching for names
		[clear   show	active   hide all ] Search
	Name	DOB	PostCode

- b. Enter search criteria and then click the **Search** button. A list of matching drivers/assistants is displayed.
- c. Select the driver/assistant you want to add and then click the **Select** button to select that driver/assistant and close the dialog.
- 5. If required, select the days that the driver/assistant works on the route using the **Every** check boxes.
- 6. Enter the date that the driver/assistant started working the route into the from field.
- 7. Enter until, Outward from and Returning from information as required.
- 8. Click the **Save** button.

#### Deleting a Driver/Passenger Assistant from a Route

- 1. Select a route. For more information on selecting routes, see <u>Selecting a Route</u> on page 83.
- 2. Select the Drivers & assistants tab.
- 3. Highlight the driver/assistant you want to delete.

[one]	Processes	People	Operations	Utilities	Admin	v	/elcome <mark>\$</mark> }		l Help	C	Change Password		Logout
Stops	Routes	Contractors	Contracts	Bulk co	ontract renewal								
Code				В	DCC01 - B	edford Day C	are Cent	tre - Rout	e 01				
Description					etails Stops	Loading	assengers	Drivers & a	esistants	Surveys	Мар		
Base	Schools		Q <b>X</b>		Role	Lodding		Name		Guirojo	From		Until
Туре	All types		•	Dr	iver								
Area	All		•	As	sistant								
Dates	Current		•										
			[clear] Search										
Code	Descrip	tion	Area	[ ac	ld new driver or a	ssistant   delete select	ed driver or a	ssistant ]					
BDCC01	Bedford	Day Care Centi	re - Rc BED	<u> </u>									
DWBT2	Whitwick	Green connec		Na	ne				*	0, 2			
GA01	Green A	obey - MapInfo	route					. Internet	-		diama ta a sa		
GRAN1	Brickhill	to Grange Scho	ool (Ta	Eve	ery	MTWTF	s s	from dd/m	m/yyyy	e until de	d/mm/yyyy		
GRANHI	Grange I	Hill Primary		Out	ward from	stop	Q. <b>X</b>	@ hh:mm	to	stop or l	base Q	× @	hh:mm
LEE	Lee Test	Route		Ret	urning from	stop or base	Q×	@ hh:mm	to	stop	Q	× @	hh:mm
LEE7	Leagrav	Junior School	BED	Re	urning nom	stop of base	~~		10	stop	~		
N_01	TR-N/W	Route1	BED									Memo	+
N001	T123											[ can	cel] Save
new route	new rout		BED										

- 4. Click the **delete selected driver or assistant** hyperlink. A confirmation dialog is displayed.
- 5. Click the **Delete** button to delete the driver/assistant from the route.

# **Recording a Route Survey**

#### Adding a Route Survey

- 1. Select a route. For more information on selecting routes, see <u>Selecting a Route</u> on page 83.
- 2. Select the Surveys tab.
- 3. Click the **add new survey** hyperlink to display editable fields relating to survey details.

[one] P	Processes People	Operations L	Itilities Admin	Welcome SYSACAM	🖌   Help   Change Passw	vord   Logout
Stops	Routes Contractors	Contracts	Bulk contract renewal			
Code			BDCC01 - Bed	ford Day Care Centre - R	oute 01	
Description			Details Stops	Loading Passengers Driver	rs & assistants Surveys Map	
Base	Schools	Q¥	Date +	Contractor	Surveyor	
Туре	All types	•				
Area	All	•				
Dates	Current	• )				
		[clear] Search	[ add new survey   delet	e selected survey ]		
Code	Description	Area				
	Card of the local division of the local divi	^	Date dd/mm	l/yyyy 🙀 Time hh	imm Memo 🕇	
100			Contractor		Q.X * [details]	
and the second s	And I have all	100 C	Surveyor		Q <b>X *</b>	
And and a second se	-		Driver		Q. <b>X</b>	
101	100	1995				
100	Contraction (Sec.)	1.000	Passenger count			
	1000	100	Entitled	Temporary Assistants	Others Tota	al O
The second	Tana Print Print					[cancel] Save
PATI 1	Virgin Pailways					L composi 1

- 4. Enter the **Date** that the survey took place.
- 5. If required, add the **Time** of the survey.
- 6. Select the contractor used on the route:
  - a. Click the **Contractor** browse to display the **Select Contractor** dialog.

:	Select Contractor	r	
	Active		
		[Clear Search]	Search
Company Name	Contact	Telephone	Active
A1 Cars	Ma	0	
ani10	te		
ani131	an		<b>V</b>
Archer Carrs	Hu	4	$\checkmark$
Arrow Travel	Jo	8	$\checkmark$
asa	as		$\checkmark$
Auckland Taxis	Jo	8	$\checkmark$
Bailey Travel	Ch	9	$\checkmark$
Barton Private Hire	Jo	0	✓
Bernie's Taxis	Be	2	<ul> <li></li> </ul>
Showing 1 - 71 of 71		<pre>&lt; prev</pre>	next >
		[ Close	] Select

- b. Enter the name of the contractor into the search field and then click the **Search** button.
- c. Highlight the contractor and then click the **Select** button to select that contractor and close the dialog.

- 7. Select the surveyor who carried out the survey:
  - a. Click the **Surveyor** browse to display the **Select a Surveyor** dialog.

Select a Surveyor
Name 😓
[Close] Select

- b. Highlight the surveyor and then click the **Select** button to select that surveyor and close the dialog.
- 8. If required, select the route's driver:
  - a. Click the Driver browse to display the Select a Driver dialog.

Active drivers Any name characters Select a base	Q <b>X</b>
Select a base	
Select a base	0.*
Select a base	0.*
	4.4
dd/mm/yyyy	
ie I	[ clear   show all   hide all ] Sear DOB PostCode
	MK43 7HW
	< prev   next >
	ne

- b. Enter search criteria and click the **Search** button. A list of matching drivers/assistants is displayed.
- c. Select the driver/assistant you want to add and then click the **Select** button to select that person and close the dialog.
- If required, enter the passenger count for the surveyed journey into the fields in the Passenger count section. The Passenger count section enables you to record separate numbers for Entitled passengers, Temporary passengers, Assistants and Others.
- 10. Click the **Save** button to save the survey details.

**NOTE:** Once the survey is created, the **create new vehicle check** hyperlink is displayed at the bottom of the **Operations | Routes | Surveys** page. Click this link to record details of a new vehicle check that is linked to the selected survey. For more information on recording vehicle checks, see <u>Managing</u> <u>Vehicle Checks</u> on page 104.

#### **Deleting a Route Survey**

- 1. Select a route. For more information on selecting routes, see <u>Selecting a Route</u> on page 83.
- 2. Select the **Surveys** tab.
- 3. Highlight the survey you want to delete.

[one]	Processes	People	Operations	Utilities	Admin		Welcome \$	SADMIN	1	Help	-T	Change Password	I	Logout
Stops	Routes	Contractors	Contracts	Bulk contra	ct renewal									
Code				BDC	C01 - Be	edford Day	Care Cen	tre - Rou	ute O	1				
Description	n			Details	Stops	Loading	Passengers	Drivers &	seciet	ante	Surv	eys Map		
Base	Schools	3	QX		ite 1		Contractor	Dincis d	103330	ante	Jurv	Surveyor		
Туре	All types	8	٠	12/03/	2017 Berr	nie's Taxis								
Area	All			0										
Dates	Current		•	0										
			[clear] Search	[add n	ew survey   <u>del</u>	lete selected surv	<u>ey</u> ]							

- 4. Click the **delete selected survey** hyperlink. A confirmation dialog is displayed.
- 5. Click the **Delete** button to delete the survey.

# Viewing a Route on a Map

- 1. Select a route. For more information on selecting routes, see <u>Selecting a Route</u> on page 83.
- 2. Select the Map tab. A map of the route is displayed.



3. If required, enter a date into the **On date** field to view the route's course on a particular day.

# **05** | Managing Contractors and Contracts

The **Operations | Contractors** page enables you to record details of the contractors your LA uses, including the numbers and types of vehicles they operate. You can also manage payments to contractors from this screen.

Details of individual contracts, including costs, revisions and budget codes, are managed through the **Operations | Contracts** screen. In addition, you can renew existing contracts in bulk from the **Operations | Bulk contract renewal** screen.

# **Managing Contractors**

One Transport enables you to record contractor details separately from route and contract information. This is especially useful if your LA uses one contractor to cover multiple routes.

# **Selecting a Contractor**

1. Select the **Operations** area and open the **Contractors** page. Search fields related to contractor details are displayed.

Search for	Active contractors -	No contractor selected
Name	Any name characters	
Туре	All	
Area	All	Details Routes Vehicles Checks Payments
Vehicle	registration All	
	[clear] Search	

- 2. Enter search criteria for the contractor you want to select. You can enter the following criteria:
  - Search For: Enables you to search for Active contractors, Inactive contractors or All contractors.
  - Name: The contractor's name
  - **Type:** The contractor's operator type.
  - Area: Returns contractors based in a particular area.
  - Vehicle: Returns contractors who operate a particular vehicle type. This function is particularly useful when dealing with complaints about contractors from members of the public.
  - **Registration:** The registration of a specific vehicle operated by the contractor.
- 3. Click the **Search** button to display a list of the contractors that match your search criteria.

**NOTE:** To export the returned search results into a spreadsheet file, click the **export** hyperlink at the bottom of the list.

4. Highlight the contractor you want to view.

**NOTE:** All search fields are optional. Clicking the **Search** button without entering any search criteria returns a list of all contractors in One.

One Transport displays the number of results matching the entered search criteria at the bottom of the search panel. However, Access Control List (ACL) restrictions are applied in-between the search being completed and the results being displayed. Therefore, the number of results visible on screen may not match the given number of results, depending on the ACLs applicable to your One user ID. For more information on ACLs in One see the RG\_ACL\_ACL Definition reference guide, available from www.onepublications.com and My Account.

# **Adding a Contractor**

- 1. Select the **Operations** area and open the **Contractors** page.
- 2. Click the **Search** button and then click the **create new contractor** hyperlink. Editable fields related to contractor details are displayed.

Vehicle registration Al [clear] Set	weh	Active	Comment			
		Company name		Code		
Name	-	Legal name				
Clemence Cars	~	Primary operator type	Select operator type			
Contractor 2			Select other operator type(s)	+		
Cox Cabs		Other operator type(s)	Select other operator type(s)	+		
Cullen Coaches		Area(s) covered	Select area(s)	•		
Dave's Taxis						
Dean Travel	10	Proprietor	Select a person			Q.X
Dixon Coaches		Contact name			1	
Doughty Minibus Hire		Address				QX
Faddy Cars		2001035				
FFF company Itd		Email				
France Motors		Phone 1				
Seoffrey's Coaches						
3G Company		Phone 2				
Srange Taxis		Fax				
Harbottle Cars		Address phone				
laywood Coaches		CONTRACTOR PORTO				
Howles Coaches and Minibuses		Creditor ref code	Registration application d	late	dd/mm/yyyy	
lones Speed	- 1					
atimer Travel		Produces own tickets	Memo 🕈			
Latters Travel	_	> Udf				
lavan inactive					[carcel]	
Lavan_Contractor - Lavan_Contractor	- 1				Coursen 1	Table
	_					
LEA						
LEA London Transport Luton and District	¥					

- 3. Select the Active check box.
- 4. Enter a Company name and Contact name for the contractor.
- 5. Enter any additional details as required.
- 6. Click the **Save** button to add the contractor to the database.

### **Editing Contractor Details**

- 1. Select a contractor. For more information on selecting contractors, see <u>Selecting a Contractor</u> on page *98*.
- 2. Ensure that the **Details** tab is selected. Editable fields relating to contractor details are displayed.

Area All		•	Details Routes Ve	hicles Checks Pi	aymenta			
Vehicle	(registration) All		Active	Comment 2nd Phone No for Yard				
	[clear] Score	th						
			Company name	Cullen Coaches	*	Code		
Name	12		Legel name					
Clemence Ca	5	~	Primary operator type	PSV - PSV	-			
Contractor 2								
Cox Cabs			Other operator type(s)	Select other operator	type(s) •			
Cullen Coach	5		Area(a) covered	SHAR - Shambrook	•			
Dave's Taxis								
Dean Travel		- 10	Proprietor	Select a person			Q.M	
Dixon Coache	5		Contact name	Million				
Doughty Mini	bus Hire						QX	
Faddy Cars			Address					
FFF company	Itd		Email					
France Motor	1		Phone 1	10000				
Geoffrey's Co	aches							
GG Company			Phone 2					
Grange Taxis			Fax					
Harbottle Car			Address phone					
Haywood Coa			reaction provide					
	ies and Minibuses		Creditor ref code	R	egistration application date	dd/mm/	vivi	
Jones Speed								
Latimer Trave			Produces own tickets	□ N	Aemo 🛨			
Latters Trave			> Udf					
lavan inactive							cell Sere	
Lavan Contri	ctor - Lavan Contractor		[View drivers & Passenger	essistants ]		[ can	cel ]	

- 3. Make the required changes.
- 4. Click the **Save** button to save your changes.

# **Deleting a Contractor**

- 1. Select a contractor. For more information on selecting contractors, see <u>Selecting a Contractor</u> on page *98*.
- 2. Highlight the contractor that you want to delete and then click the **delete contractor** hyperlink. A confirmation dialog is displayed.

Area All 👻	Details Routes Vehicle	s Checks Payments	
Vehicle registration All	Active	Comment 2nd Phone No for Yard	
[clear] Search	Active		
	Company name	Cullen Coaches * Code	
Name	Legal name		
	Logarnano		
Clemence Cars	Primary operator type	PSV - PSV ·	
Contractor 2	Other operator type(s)	Select other operator type(s)	
Cox Cabs			
Cullen Coaches	Area(s) covered	SHAR - Sharnbrook	
Dave's Taxis	Proprietor	Select a person	0.8
Dean Travel	Proprietor	Select a person	-,
Dixon Coaches	Contact name	M	*
Doughty Minibus Hire	Address		Q. <b>X</b>
Faddy Cars			
FFF company ltd	Email		
France Motors	Phone 1		
Geoffrey's Coaches	Phone 2		
GG Company	Fiblic 2		
Grange Taxis	Fax		
Harbottle Cars	Address phone		
Haywood Coaches			
Howles Coaches and Minibuses	Creditor ref code	Registration application date	dd/mm/yyyy
Jones Speed	Deadless and Kalada	Memo +	
Latimer Travel	Produces own tickets	Memo I	
Latters Travel	> Udf		
lavan inactive			[cancel] Save
Lavan_Contractor - Lavan_Contractor	[View drivers & Passenger assis	tants ]	[cancer] save
LEA			
London Transport 🗸 🗸			
Luton and District			
Showing 1 - 63 of 63 < prev   next >			
[create new contractor   belete contractor   export ]			

3. Click the **Delete** button to remove the contractor from the One Transport database.

# **Viewing Contractor Routes**

- 1. Select a contractor. For more information on selecting contractors, see <u>Selecting a Contractor</u> on page *98*.
- 2. Select the **Routes** tab to display a list of all routes serviced by that contractor.

[one] I	Processes	People	Operations	Utilities	Admin	Welco	me sysadmin	Help	Change Password	d   Logout
Stops	Routes	Contractors	Contracts	Bulk cont	ract renewal					
Search for	Active c	ontractors	•	A1	Cars					
Name	Any na	me characters		Mark R	eeve	mark.reeve@fre	eser	01234 384741		[actions V]
Туре	All		•							
Area	All		•	Detail	Routes	Vehicles Check	s Payments			
Vehicle	registra	tion All	ear 1 Search	Show o	nly Route code	e or description or from	n dd/mm/yyyy	until dd/mm/yy	/yy [show all] Refrest	[actions ¥]
		[ 00		Code	Description	iption		Operational are	a From	Until
				00000	3 Woburi	n to Cedars Upper Sch	nool 2		12/01/1993	01/04/2001
Name				123	Brickhi	ll to Grange School (T	ail-Lift)		01/03/1998	31/03/1998
A1 Cars				123	Brickhi	II to Grange School (T	ail-Lift)		01/09/2000	20/07/2001

3. If required, enter a route code or description into the **Show only** field or dates into the **or from** and **until** fields. Click the **Refresh** button to refine your search.

# Managing a Contractor's Vehicle Types

The **Vehicle types** section of the **Operations | Contractors | Vehicles** tab records the types of vehicle that a particular contractor operates, as well as recording how many of each vehicle type the contractor has.

You can configure One Transport to manage a contractor's listed vehicle types automatically by selecting **Manage automatically** from the drop-down menu at the top of the **Vehicle types** section. With **Manage automatically** selected, One Transport populates the **Vehicle types** section using the data entered in the **Individual vehicles** section. For more information on adding and removing individual vehicles to a contractor's record, see <u>Managing a Contractor's</u> Individual Vehicles on page *103*.

Alternatively, you can manage a contractor's vehicle types independently of the individual vehicles that are listed for that contractor by selecting **Allow manual management** from the drop-down menu at the top of the **Vehicle types** section.

#### Adding a Vehicle Type to a Contractor

You can only add those vehicle types that have already been created in Transport to contractors. For more information on creating vehicle types, see <u>Creating a Vehicle Type</u> on page 142.

- 1. Select a contractor. For more information on selecting contractors, see <u>Selecting a Contractor</u> on page *98*.
- 2. Select the **Vehicles** tab and open the **Vehicle types** section to display a list of the vehicle types that are associated with that contractor.

[one] Pr	ocesses	People	Operations	Utilities	Admin		Welcome <del>aynadmin</del>	I Help		Change Passv	word   Lo	gou
Single passe	<mark>nger</mark> Mu	ltiple passe	engers Bulk	transfer								
Search for	Active contr	actors		A1	Cars							
Name	Any name	characters									[actions	¥
Туре	All		•									
Area	All		•	Deta	ails Rou	tes Vehicle	s Checks Payments	1				
Vehicle	registration	All	•	~ V	ehicle typ	es						
		[cl	lear] Search	_		management	•					
Name					Quantity	Туре	Description	Se	ating W	/chairs	Max (Incl. standing)	
1 Cars				1		HEL1	Helicopter	5	0	5		
rcher Carrs				1		CHA1	Chariot	2		2		
rrow Travel				1		DON1	Donkey	1		1		
uckland Taxi	s											
ailey Travel						1						
Barton Private	Hire			Įa	aa new type	change quan	ity   delete selected type ]					

3. Ensure that **Allow manual management** is selected from the drop-down menu at the top of the section and then click the **add new type** hyperlink to display the **Add new vehicle type to fleet** dialog.

	μ	Add new vehicle ty	ype to fleet
Quantity	quantity	Select type	•
			[ Cancel

- 4. Select the type of vehicle you want to add from the Select type menu.
- 5. Enter the **quantity** of vehicles of that type that the contractor operates.
- 6. Click the Add button to add the selected quantity of vehicles and close the dialog.

#### Changing a Contractor's Vehicle Type Quantity

- 1. Select a contractor. For more information on selecting contractors, see <u>Selecting a Contractor</u> on page *98*.
- 2. Select the **Vehicles** tab and open the **Vehicle types** section to display a list of the vehicle types that are associated with that contractor.

[one] Pr	ocesses People <mark>O</mark>	perations	Utiliti	es Admin		Welcome <del>synadium</del>	Help	Change Pas	ssword   Log
Single passe	nger Multiple passenge	ers Bul	k transfe	r					
Search for	Active contractors	•		A1 Cars					
Name	Any name characters			100 ( March 10)		Col M. Statement			[actions <sup>3</sup>
Туре	All								
Area	All	+		Details R	outes Vehicl	Checks Payments	i i		
Vehicle	registration All	•	1	Vehicle ty	mes				
	[clear]	Search	Î.		al management	•			
Name				Quantity	Туре	Description	Seating	W/chairs	Max (Incl. standing)
A1 Cars				1	HEL1	Helicopter	5	0 5	standing)
rcher Carrs			1	1	CHA1	Chariot	2	2	
Arrow Travel				1	DON1	Donkey	1	1	
uckland Taxi	s								
Bailey Travel						and the selected time t			
				[ add new type	e   change quan	tity   delete selected type ]			

- 3. Ensure that **Allow manual management** is selected from the drop-down menu at the top of the section and then highlight a vehicle type.
- 4. Click the change quantity hyperlink to display the Change quantity of dialog.

Change qua	ntity of M	IB16
New quantity	1	
		[ Cancel ] Change

5. Enter a new **quantity** and then click the **Change** button to save your changes and close the dialog.

#### **Removing a Vehicle Type from a Contractor**

- 1. Select a contractor. For more information on selecting contractors, see <u>Selecting a Contractor</u> on page *98*.
- 2. Select the **Vehicles** tab and then open the **Vehicle types** section to display a list of the vehicle types that are associated with that contractor.

[one] Pr	ocesses People	Operations	Utilities	Admin		Welcome <b>sysadmin</b>	Help	Change I	Password	Logou
Single passe	enger Multiple pass	engers Bull	transfer							
Search for	Active contractors	•	A	1 Cars						
Name	Any name characters			1000					I	actions 🖤
Туре	All	•								
Area	All	•	Det	ails Ro	utes Vehicle	es Checks Payments				
Vehicle	registration All	•	*1	/ehicle ty	Des					
	[c	lear] Search			al management	•				
Name				Quantity	Туре	Description	Seating	W/chairs	Max (In standing	
A1 Cars			1		HEL1	Helicopter	5	0	5	
Archer Carrs			^ 1		CHA1	Chariot	2		2	
Arrow Travel			1		DON1	Donkey	1		1	
Auckland Tax	s									
Bailey Travel					e   change guan	tity   delete selected type ]				
Barton Private	e Hire		[4	add new type	r I criange quan	iny   believe selected type ]				

- 3. Ensure that **Allow manual management** is selected from the drop-down menu at the top of the section and then highlight a vehicle type. Click the **delete selected type** hyperlink. A confirmation dialog is displayed.
- 4. Click the **Yes** button to delete the vehicle type and close the dialog.

## Managing a Contractor's Individual Vehicles

The **Individual vehicles** section of the **Operations | Contractors | Vehicles** tab enables you to record details of the individual vehicles that a particular contractor operates.

#### Adding an Individual Vehicle to a Contractor

- Select a contractor. For more information on selecting contractors, see <u>Selecting a Contractor</u> on page 98.
- 2. Select the **Vehicles** tab and then open the **Individual vehicles** section to display a list of the individual vehicles operated by the contractor.

rea	All		•	Details Route	s Vehicles Check	s Payment	s				-
/ehicle	registration	All	•	> Vehicle type	s						
		[clear]	Search	✓ Individual ve	hicles						
ame				Registration	Type / description	From	Until	Ins exp	Тах ехр	MOT exp	1
Cars			100	ov08 zng	CO53-bus	01/10/2014		10/11/2014	29/10/2014	08/10/2014	1
i10 - ani10	D		^								
131 - ani1	131										
cher Carrs											
ow Travel											
a - asa											
uckland Tax	xis			[ add new vehicle	see checks for this vehicl	e   delete vehic	le]				

3. Click the **add new vehicle** hyperlink to display editable fields related to vehicle details.

[ add new vehicle   se	e checks for this v	rehicle   de	lete vehicle ]				
							[actions V]
<b>A</b>							
Registration	ov08 zng	is of type	CO53 - Coach 🔻	*	bus	*	Memo 🕂
Operated from	01/10/2014	until	dd/mm/yyyy				
Expiry of insurance	10/11/2014	Tax	29/10/2014	MOT	08/10/2014		
							[cancel] Save

- 4. Enter the vehicle's **Registration**.
- 5. Select the vehicle's type from the **is of type** menu.
- 6. Enter a **Description** of the vehicle.
- 7. Enter dates into the **Operated from**, **until**, **Expiry of insurance**, (expiry of) **Tax** and (expiry of) **MOT** fields as required.
- 8. Click the Save button to add the vehicle to the contractor's list.

#### **Deleting a Vehicle from a Contractor**

- 1. Select a contractor. For more information on selecting contractors, see <u>Selecting a Contractor</u> on page *98*.
- 2. Select the **Vehicles** tab and then open the **Individual vehicles** section to display a list of the individual vehicles operated by the contractor.

Area	All		•	Details Route	s Vehicles Check	s Payment	8				
Vehicle	registration	registration     All     > Vehicle types       [clear]     Search     > Individual vehicles									
Name				Registration	Type / description	From	Until	Ins exp	Тах ехр	MOT exp	
A1 Cars				ov08 zng	CO53-bus	01/10/2014		10/11/2014	29/10/2014	08/10/2014	8
ani10 - ani1(			^								
ani 131 - ani : Archer Carrs											
Arrow Trave	ł										
asa - asa											
Auckland Ta:	xis			[ add new vehicle	see checks for this vehicle	e   delete vehic	le]				

- 3. Highlight the vehicle you want to delete and then click the **delete vehicle** hyperlink. A confirmation dialog is displayed.
- 4. Click the **Delete** button to delete the vehicle record.

## **Managing Vehicle Checks**

The **Operations | Contractors | Checks** tab enables you to record roadworthiness checks on a contractor's vehicles.

#### **Recording a Vehicle Check**

- 1. Select a contractor. For more information on selecting contractors, see <u>Selecting a Contractor</u> on page *98*.
- 2. Select the **Checks** tab and then click the **record new check** hyperlink. Editable fields related to vehicle checks are displayed.

Area	All	Details Routes Vehicles Checks Payments	
Vehicle	registration All	Show checks on registration between dd/mm/yyyy and 10/10/2014	[clear] Searc
	[ clear ] Search	Registration  Type/description Date Roadworthiness	
Name			
A1 Cars			
ani10 - ani10	~		
ani131 - ani13	31		
Archer Carrs			
Arrow Travel			
asa - asa			
Auckland Taxis	s	No records to view	a manufacture de la contra
Bailey Travel		record new check   delete check ]	< prev   next >
Barton Private	Hire	[ record new check ] delete check ]	
Bernie's Taxis		Registration was checked on dd/mm/yyyy	
Better Travel		Checked by	
Bond Travel			
Bowers Minibu	ises	Type Vehicle Type	
BR-Contractor	1-Plsdn't use - BR-Contractor1-Plsdn't u	Outcome Roadworthiness A Memo +	
Carter Coache	s		[Cancel] Save

- 3. Enter the **Registration** of the checked vehicle.
- 4. If required, enter the date of the check into the **checked on** field.
- 5. Select the surveyor who checked the vehicle:
  - a. Click the Checked by browse to open the Select a Surveyor dialog.



- b. Highlight the required surveyor.
- c. Click the Select button to select the surveyor and close the dialog.

**NOTE:** The **Select a Surveyor** dialog only lists people who have been previously designated as surveyors. For more information on designating people as surveyors, see <u>Managing Surveyors</u> on page 140.

- 6. Select Vehicle Type and Outcome details as required.
- 7. Click the Save button to record the vehicle check.

#### Viewing a Vehicle's Check Records

There are two ways of accessing a vehicle's check records. One option is to search for the vehicle in the **Checks** tab:

- 1. Select a contractor. For more information on selecting contractors, see <u>Selecting a Contractor</u> on page *98*.
- 2. Select the Checks tab to display vehicle search fields.

[one]	Processes	People	Operations	Utilities	Admin		Welcome			Help		Change Password		Logout
Stops	Routes	Contractors	Contracts	Bulk cor	tract renewal									
Search fo	or Active c	ontractors	•	A1	Cars									
Name	Any na	me characters			and a	1000				-			[a	ctions 🐨 ]
Туре	All		•											
Area	All		•	Deta	ils Routes	Vehicles	Checks	Payments						
Vehicle	registra	tion	•	Show	checks on	registration	between	dd/mm/yy	уу ]	and	14	/03/2017	clear]	Search
		[c]	ear] Search	Reg	istration 🔶 🗍	Type/descripti	on	1	Dat	e R	oadv	vorthiness		

- 3. Enter registration details for the vehicle.
- 4. Enter a check date range into the between and and fields
- 5. Click the **Search** button to return a list of vehicles with checks that match your search criteria.
- 6. Select a vehicle to view the checks that are associated with that vehicle.

The **registration**, **between** and **and** fields are optional. Leaving these fields blank and clicking the **Search** button returns a list of all vehicle checks.

Alternatively, you can select a vehicle in the **Vehicle** tab and then use the **See checks for this vehicle** function.

- 1. Select a contractor. For more information on selecting contractors, see <u>Selecting a Contractor</u> on page *98*.
- 2. Select the **Vehicles** tab and then open the **Individual vehicles** section to display a list of the individual vehicles operated by the contractor.

[one]	Process	es People	Operations	Utilities	Admin	Welcon	ne <mark>sysadm</mark> in		Help		Change Passwo	ord	Logout
Stops	Routes	Contractors	Contracts	Bulk	contract renewa	1							
Search fo	Act	ve contractors	-		A1 Cars								
Name	Any	name characters		Ma	irk Reeve	mark.reeve@free	ser	01234	384741			[8	actions 🐨 ]
Туре	All		•										
Area	All		•		etails Route	s Vehicles Checks	Payment	s					
Vehicle	reg	stration All	•	,	Vehicle type	s							
		[c	lear ] Search		Individual ve								
Name					Registration	Type / description	From	Until	Ins e	хр	Тах ехр	MOT exp	
A1 Cars					B4NHUR	CHA1-Chariot							
Archer Car	rs			^	CHOPPA	HEL1-Helicopter							
Arrow Trav	/el				D0BB1N	DON1-Donkey							
Auckland 1	Taxis												
Bailey Tra	vel												
Barton Priv	vate Hire												
Bernie's Ta	axis				add new vehicle	see checks for this vehicle	delete vehic	:le]					

3. Highlight the vehicle whose checks you want to view and click the **see checks for this vehicle** hyperlink. One opens the **Checks** tab and automatically searches for the vehicle's check history.

#### **Deleting a Vehicle Check**

- 1. Select a contractor. For more information on selecting contractors, see <u>Selecting a Contractor</u> on page *98*.
- 2. Select the **Checks** tab. A list of that contractor's previous vehicle checks is displayed.

		A1 Cars				
Search for	Active contractors -	7ti ouis				
Name	Any name characters	M	THE R. LEWIS	A DESCRIPTION OF		[actions V]
Туре	All					
Area	All	Details Rout	es Vehicles Checks F	Payments		
Vehicle	registration All	Show checks on	registration between c	dd/mm/yyyy and	10/10/2014	[clear] Search
	[clear] Search	Registration 🚖	Type/description	Date	Roadworthiness	
		T3ST 01	CO55 - Coach (55 seater)			
Name						
A1 Cars		^				
ani10 - ani10						
ani131 - ani1	31					
Archer Carrs						
Arrow Travel						
asa - asa						
Auckland Tax	ūs					
Bailey Travel		Showing 1 - 1 of				< prev   next >
Barton Privat	a Hira	[ record new check	delete check ]			

- 3. Highlight a check and then click the **delete check** hyperlink. A confirmation dialog is displayed.
- 4. Click the **Yes** button to delete the check.

## **Managing Contractor Payments**

The **Operations | Contractors | Payments** tab enables you to generate payments to contractors either individually or in bulk.

#### **Creating Individual Contractor Payments**

- 1. Select a contractor. For more information on selecting contractors, see <u>Selecting a Contractor</u> on page *98*.
- 2. Select the **Payments** tab. A list of the selected contractor's previous payments is displayed.

Area	All	•	Details Routes	Vehicles Checks	Payments			
Vehicle	registration	-	Invoice reference	Route code & description	Period from	Until	Due on	Net amount
		[ clear ] Search	543	NEW012 - Newland Primary S	01/08/2000	31/08/2000		20.00
			dfgdf	123 - Brickhill to Grange Sch	01/03/1999	31/03/1999		3,795.00
Name			cheryl1	DAUB1 - Bromham to Daube	01/06/1998	30/06/1998		120.00
			cheryl02	DAUB1 - Bromham to Daube	01/06/1998	30/06/1998		120.00
			 A1/july98	DAUB1 - Bromham to Daube	01/06/1998	30/06/1998		120.00
			inv001	SHAR13 - Shelton to Sharnbr	01/01/1996	31/12/1996		3,960.00 🗡
-			[ create single new payr	nent   generate multiple new paym	ents   delete paym	ient]		

 Click the Create Single New Payment hyperlink. Editable fields related to payment details are displayed.

Serial number	0 (this unique number is automatically generated)	
Invoice reference	(from contractor) Memo	
Contract	Q ¥ ₩ LA reference number	
Period from	dd/mm/yyyy * until dd/mm/yyyy *	
Entered on	10/10/2014         Due on         dd/mm/yyyy         Paid on         dd/mm/yyyy	
Net amount	0.00 (pounds) *	
VAT	0.00 (pounds) @ 0.00 %	
Total payment	0.00	
> Udf		
	[ cancel ]	] Save

4. Enter an **Invoice reference**. This is the reference provided by the contractor.

- 5. If applicable, select the contract that the payment applies to:
  - a. Click the **Contract** browse to display the **Select a contract** dialog.

Contract	number			
Route	code or descript	tion		
				[clear] Search
Contra	ct No	Period from	Until	Route code & Description
		05/09/1991		SHAR13 - Shelton to Sharnbrook U
		01/03/1998	31/03/1998	123 - Brickhill to Grange School (Ta
1245		01/09/2000	20/07/2001	123 - Brickhill to Grange School (Ta
		01/01/1998	31/03/1998	GROUP1 - Group 1
		18/03/1998	31/12/1998	IMP001 - Route to Check Annual Re
		24/03/1998	01/10/2002	NEW012 - Newland Primary School
		01/09/1998	31/12/1998	SOL - Solankis Test
		12/01/1993	01/04/2001	000003 - Woburn to Cedars Upper
		01/02/2001		MISC - Miscellaneous Social Service
Showing 1 - 13 of	13 contract(s)			< prev   next >

- b. Enter search criteria and then click the **Search** button to display a list of matching contracts.
- c. Highlight the contract you want to use and then click the **Select** button to select that contract and close the dialog.
- 6. If required, enter an LA reference number.
- 7. Enter valid dates into the **Period from** and **until** fields.
- 8. Enter valid dates into the Entered on, Due on and Paid on fields as required.
- 9. Enter the **Net amount** of the payment in pounds. The non-editable **VAT** and **Total payment** fields update to show the total cost of the payment.

**NOTE:** The VAT rate used to calculate the total payment is defined by the contract the payment is made against. For information on changing a contract's VAT rate, see <u>Setting Contract Costs</u> on page 113.

10. Click the **Save** button to save the payment.

**NOTE:** You can also add a new payment from the **Operations | Contracts | Payments** tab. To do so, click the **add new payment for this contract** hyperlink. The **create new single payment** menu appears with the selected contract pre-populated in the **Contract** field.

#### **Generating Multiple Contractor Payments**

- 1. Select a contractor. For more information on selecting contractors, see <u>Selecting a Contractor</u> on page *98*.
- 2. Select the **Payments** tab. A list of the selected contractor's previous payments is displayed.

Area	All	-	Details Routes	Vehicles Checks	Payments			
Vehicle	registration All	-	Invoice reference	Route code & description	Period from	Until	Due on	Net amount
	[clear]	Search	543	NEW012 - Newland Primary S	01/08/2000	31/08/2000		20.00
			dfgdf	123 - Brickhill to Grange Sch	01/03/1999	31/03/1999		3,795.00
Name			cheryl1	DAUB1 - Bromham to Daube	01/06/1998	30/06/1998		120.00
			cheryl02	DAUB1 - Bromham to Dauber	01/06/1998	30/06/1998		120.00
			A1/july98	DAUB1 - Bromham to Dauber	01/06/1998	30/06/1998		120.00
			inv001	SHAR13 - Shelton to Sharnbr	01/01/1996	31/12/1996		3,960.00
			[ create single new pay	ment   generate multiple new paym	ents   delete paym	ient]		

3. Click the generate multiple new payments hyperlink to display the Generate multiple new payments to dialog.

enerate multiple new p	aymen	ts to A1 Cars		
dd/mm/yyyy	to	dd/mm/yyyy	Preview	
				[cancel] Finish
			dd/mm/yyyy to dd/mm/yyyy	

4. Enter dates into the Generate all payments for period from and to fields and then click the Preview button. A list of all contracts and routes requiring payment for the specified time period is displayed. The Already Paid column shows the amount already paid for each contract within the period being processed.

Generate multip	le new payments to A1 Cars	1		
Generate all payments for period from 11/05/2016	to 11/05/2016	Preview		
Apply to all 📋 Invoice reference	Payment date dd/mm/yyyy			
Contract Route code & description	Invoice reference	Amount	Paid on	Already Paid
SHAR13 - Shelton to Sharnbrook Upper Scho		0.00	dd/mm/yyyy	0.00
MISC - Miscellaneous Social Service Payment		0.00	dd/mm/yyyy	0.00
Total		0.00		
			[cancel	] Finish

- 5. If required, use the **Apply to all** flag to apply an invoice reference and payment date to all contracts in the list:
  - a. Select the Apply to all check box.
  - b. Enter an Invoice reference.
  - c. Enter a Payment date.
- 6. Use the check boxes to select the contracts you want to make payments for. If you entered an **Invoice reference** and **Payment date** in step 5, then these details are populated for the selected contracts.
- 7. For each selected contract, enter a payment about into the **Amount** field. The **Total** field displays a running total of all payments for the selected contracts.
- 8. If you did not enter an **Invoice reference** and **Payment** date in step 5, then enter these details into the **Invoice reference** and **Paid on** fields for each individual contract.
- 9. Click the **Finish** button to make the payments and close the dialog.

#### **Deleting Contractor Payments**

- 1. Select a contractor. For more information on selecting contractors, see <u>Selecting a Contractor</u> on page *98*.
- 2. Select the **Payments** tab. A list of the selected contractor's previous payments is displayed.

Area	All		•		Details Routes	Vehicles Checks F	ayments				
Vehicle	registration All	_	•	L	Invoice reference	Route code & description	Period from	Until	Due on	Net amount	
		[clear] S	earch		543	NEW012 - Newland Primary S	01/08/2000	31/08/2000		20.00	
					dfgdf	123 - Brickhill to Grange Sch	01/03/1999	31/03/1999		3,795.00	
Name					cheryl1	DAUB1 - Bromham to Dauber	01/06/1998	30/06/1998		120.00	
					cheryl02	DAUB1 - Bromham to Dauber	01/06/1998	30/06/1998		120.00	
				1	A1/july98	DAUB1 - Bromham to Dauber	01/06/1998	30/06/1998		120.00	
					inv001	SHAR13 - Shelton to Sharnbr	01/01/1996	31/12/1996		3,960.00	ľ
1000					[ create single new paym	ent   generate multiple new payme	ents   delete paym	ient]			

- 3. Highlight the payment you want to delete and then click the **delete payment** hyperlink. A confirmation dialog is displayed.
- 4. Click the **Delete** button to delete the payment.

**NOTE:** You cannot delete payments with a recorded **Paid On** date.

# **Managing Contracts**

Contracts are a separate entity to routes in One Transport v4. Managing contracts and routes independently enables you to set up contracts for future use, as all contracts have a specified **Start Date**.

## **Selecting a Contract**

1. Select the **Operations** area and open the **Contracts** page. Search fields relating to contract details are displayed.

[one]	Processes	People	Operations	Utilities	Admin		Welcome	sysadmin	I.	Help	Į.	Change Password	E	Logout
Stops	Routes	Contractors	Contracts	Bulk con	tract renewal									
Include	Current	t and future contr	acts 🔻	No	contract sel	lected								
Number	Contra	ct number												
Name	Contra	ctor name							-		-			
Туре	All		÷	Deta	iils Costs	Payments								
Route	route		Q. <b>X</b>											
		(i	clear] Search	Ê.										

- 2. Enter search criteria for the contract you want to select. You can enter the following criteria:
  - Include: Select from Current and future contracts, Future contracts or All contracts.
  - Contract Number:
  - Contractor Name:
  - Type.
  - **Route:** Returns those contracts which relate to a particular route.
- 3. Click the **Search** button. A list of the contracts that match your search criteria is displayed.

**NOTE:** To export the returned search results into a spreadsheet file, click the **export** hyperlink at the bottom of the list.

4. Highlight the contract you want to view.

**NOTE:** All search fields are optional. Clicking the **Search** button without entering any search criteria returns a list of all the contracts in One.

One Transport displays the number of results matching the entered search criteria at the bottom of the search panel. However, Access Control List (ACL) restrictions are applied in-between the search being completed and the results being displayed. Therefore, the number of results visible on screen may not match the given number of results, depending on the ACLs applicable to your One user ID. For more information on ACLs in One see the RG\_ACL\_ACL Definition reference guide, available from www.onepublications.com and My Account.

# **Creating a Contract**

- 1. Select the **Operations** area and open the **Contracts** page.
- 2. Click the **Search** button and then click the **create new contract** hyperlink. Editable fields related to contract details are displayed.

[one] Pro	ocesses Peop	ole <mark>Operat</mark>	tions	Utilities /	Admin	Welcor	ne <mark>sysadmin</mark>	Hel		Chang	ge Password	I   Logout
Stops Ro	outes Contra	ctors Con	tracts	Bulk contra	ct renew	/al						
Include	Current and future	e contracts	•									
Number	Contract number			A1 Cars		Route MISC - Mi	scellaneo	C	1/02/20	001 until		[actions 🔻 ]
Name	Contractor name				_							
Туре	All		•	Details	Cos	ts Payments						
			Q×	1								[actions V]
Route	route		~~	Contra	actor (	A1 Cars				Q.X*		
		[clear]	Search			Aloais				-4114		
				Numb	er							
Contractor	Route	Da	ite	Туре		Please select 🔹	*					
	111111 - W			Route		MISC - Miscellaneous Social	Service Payme	ents		Q <b>X</b> *		
A1 Cars		helton tc 05/09										
A1 Cars		ellaneou 01/02										
Archer Carrs		apham, N28/04		Start o	late	01/02/2001 * Star	ted because	Nothing se	elected		•	
Archer Carrs		burn to (01/06		End d	ate	dd/mm/yyyy End	ed because	Nothing se	elected		•	
Arrow Travel		kley to 501/10				+						
Arrow Travel		nsday D:07/06		Memo		т						
Arrow Travel		en Abbey01/09								[cancel]	Save	
Arrow Travel		bbey Mid 02/10										
Auckland Taxis		mington 01/01										
Auckland Taxis		oburn to 01/06										
Auckland Taxis		mington 01/09										
Bernie's Taxis		edford D01/03										
Contractor 2		Route2 01/08										
Dave's Taxis		/hitwick 05/09										
	us Hir SHAR14 - Y											
FFF company I		- Test2 06/08										
FFF company l		Route1 01/08 rtenhall, 05/09										
Jones Speed Latimer Travel		evington 05/09										
Mastek motors		irange Hi 29/01										
Mastek motors		range Hi 29/01 irange Hi 01/01										
McGowan's Ta:		akley to 10/01										
	sport SHAR10 - B											
Murdoch Trave		iseley to 05/09		~								
Showing 1 - 29		< prev   r										
_	tract   delete contrac		IUAC 2									
I create new con	inder   delete contrat	all export 1										

- 3. Select a Contractor:
  - a. Click the Contractor browse to display the Select Contractor dialog.

٤	Select Contractor		
	Active		
		[Clear Search]	Search
Company Name	Contact	Telephone	Active
A1 Cars	Ma	0	
ani10	te		
ani131	an		✓
Archer Carrs	Hu	4	$\checkmark$
Arrow Travel	Jo	8	$\checkmark$
asa	as		$\checkmark$
Auckland Taxis	Jo	8	$\checkmark$
Bailey Travel	Ch	9	$\checkmark$
Barton Private Hire	Jo	0	$\checkmark$
Bernie's Taxis	Be	2	<ul> <li></li> </ul>
Showing 1 - 71 of 71		<pre>&lt; prev</pre>	next >
		[ Close	] Select

- b. If required, enter the name of the contractor into the **Search with company name** field and then click the **Search** button. A list of matching contractors is displayed.
- c. Highlight the required contractor and then click the **Select** button to select that contractor and close the dialog.
- 4. If required, enter a contract Number.
- 5. Select a contract **Type**.
- 6. If required, select a **Route**:
  - a. Click the Route browse to display the Select from all available routes dialog.

Code			
Description			
Base	Schools		Q. <b>X</b>
Туре	All types		•
Area	All areas		*
Dates	All		•
			[ clear ] Search
Code	Description	Area	Empty seats
No records to vi	PN4		< prev   next >

- b. Enter search criteria and then click the **Search** button to display a list of matching routes.
- c. Highlight the route you want to use and then click the **Select** button to select that route and close the browse.
- 7. Enter a Start date for the contract.
- 8. Enter Started because, End date and Ended because information as required.
- 9. Click the Save button to save the new contract.

## **Editing Contract Details**

- 1. Select a contract. For more information on selecting contracts, see <u>Selecting a Contract</u> on page *109*.
- 2. Ensure that the **Details** tab is selected. Editable fields related to contract details are displayed.

Include	Current and future cont	tracts •				
Number	Contract number		Arrow Travel	Route SHAR4 - Oakley to	01/10/2000 until	[actions ¥]
Name	Contractor name					
Туре	All	•		Costs Payments		
Route	route	Q	c			[actions ¥]
		[ clear ] Search	Contractor	Arrow Travel	Q <b>X</b> *	
			Number			
Contractor	Route	Date	Туре	Please select 🔹 🛊		
ani10 - ani10	test21 - test	02/10/2014	Route	SHAR4-Oakley to Sharnbrook Upper Sc	hool QX*	
Archer Carrs	891GP - Woburn	to 101/06/2000				
Arrow Travel	SHAR4 - Oakley	to 501/10/2000				
Arrow Travel	DWB3 - Domsday	y D;07/06/2000	Start date	01/10/2000 * Started because	Nothing selected	•
Arrow Travel	GA01 - Green Ab	obey 01/09/2006	End date	dd/mm/yyyy Ended because	Nothing selected	-
Arrow Travel	ABB001 - Abbey	Mid 02/10/2000	No.	+		
Arrow Travel	NNR3 - Neels Jou	urne 01/09/2014	Memo	+		
Arrow Travel	NNR3 - Neels Jou	urne 01/12/2014	> Udf			
Arrow Travel	ND - Neels DTD	Rou 01/12/2014			(	
Arrow Travel	ND - Neels DTD I	Rou 01/09/2014			[ cancel ]	Save

3. Make the required changes.

4. Click the Save button to save your changes.

**NOTE:** Contract details are still editable for a period of time after a contract has ended. To configure how long an expired contract should remain editable, edit the **No. of days contracts should remain** editable after the closure field on the Admin | Default values & behaviours | Invoices & payments page.

## **Deleting a Contract**

You can only delete future contracts from One Transport. Past or current contracts may not be deleted.

1. Select a contract. For more information on selecting contracts, see <u>Selecting a Contract</u> on page *109*.

Name	Contractor name							
Туре	All	•	Details C	costs Payments				
Route	route	Q. <b>X</b>						[actions <b>v</b> ]
			Contractor	Arrow Travel			Q.X*	
		[clear] Search	Number					
			Number					
Contractor	Route	Date	Туре	Please select	*			
ani10 - ani10	test21 - test	02/10/2014	Route	SHAR4-Oakley to S	harnbrook Upper S	School	Q.X*	
Archer Carrs	891GP - Woburn	to (01/06/2000						
Arrow Travel	SHAR4 - Oakley	to 501/10/2000				· · · · · · · · · · · · · · · · · · ·		
Arrow Travel	DWB3 - Domsda	y D;07/06/2000	Start date	01/10/2000	Started becaus	Nothing selected	•	
Arrow Travel	GA01 - Green Ab		End date	dd/mm/yyyy	Ended because	Nothing selected	-	
Arrow Travel	ABB001 - Abbey		Memo	+				
Arrow Travel	NNR3 - Neels Jou							
Arrow Travel	NNR3 - Neels Jou		> Udf					
Arrow Travel	ND - Neels DTD I						[ cancel ] Save	
Arrow Travel	ND - Neels DTD I							
Arrow Travel	INT-BR1234 - De							
Arrow Travel Arrow Travel	NROUTE - Neels							
Arrow Travel	NNR2 - Neels NE							
Arrow Travel	NNR2 - Neels NE							
Auckland Taxis								
Auckland Taxis								
Auckland Taxis								
Auckland Taxis								
Auckland Taxis	-							
Bailey Travel	SHAR1 - Claphar							
Bailey Travel	SHAR1 - Claphar							
Bernie's Taxis	BDCC01 - Bedfor	d D01/03/2001						
BR-Contractor	L-Plsd 9 - BR-Route9	12/09/2014						
BR-Contractor1	L-Pisd 3 - BR-Route3	08/10/2014						
Showing 1 - 59	of 59	< prev   next >						
[ create new con	tract   delete contract   exp	port ]						

- 2. Click the **delete contract** hyperlink. A confirmation dialog is displayed.
- 3. Click the **Delete** button to close the dialog and delete the contract.

# **Setting Contract Costs**

- 1. Select a contract. For more information on selecting contracts, see <u>Selecting a Contract</u> on page *109.*
- 2. Select the **Costs** tab and open the **Costs** section. Editable fields relating to contract costs are displayed.

Name	Contractor Hame										
Туре	All	-		Details Costs	Payments						
Route	route	0,1	c	✓ Costs							
	[	clear] Search		Daily cost	180	(pounds)					
				Daily asst. cost		(pounds)					
Contractor	Route	Date		Total net cost	£180	plus £ 31.50	VAT at	Standard rate VAT	▼ of	17.50 9	D/
ani10 - ani10	test21 - test	02/10/2014	~	Total net cost	× 100	pius x 51.50	VAT at	Standard fate VAT	• 0	17.50	70
Archer Carrs	891GP - Woburn t	o (01/06/2000		Gross Total	£ 211.50	including VAT					
Arrow Travel	SHAR4 - Oakley to	501/10/2000		Monthly cost		(pounds)					
Arrow Travel	DWB3 - Domsday	D:07/06/2000				(a )					
Arrow Travel	GA01 - Green Abb	ey01/09/2006		Season cost		(pounds)					
Arrow Travel	ABB001 - Abbey M	1id 02/10/2000							[ 0	ancel ]	Save

- 3. Enter the required cost details. The available fields are:
  - Daily cost
  - Daily asst. (assistant) cost (pounds)
  - VAT At: Enables you to select the VAT rate that applies to the contract. Select from Not VATable, Zero Rated and Standard Rate VAT. The non-editable Including VAT field updates accordingly.
  - Monthly cost
  - Season cost
- 4. Click the **Save** button to save your changes.

## **Recording Contract Revisions**

The **Revisions** section of the **Operations | Contracts | Costs** tab enables you to record rate revisions against a contract. You can use revisions to alter the amount of money paid against a contract for a specific time period, with the contract reverting back to its original rates once the revision period is over.

#### **Adding a Contract Revision**

- 1. Select a contract. For more information on selecting contracts, see <u>Selecting a Contract</u> on page *109.*
- 2. Select the **Costs** tab and open the **Revisions** section. A list of the contract's past and current revisions is displayed.

#### Managing Contractors and Contracts

[one]	Processes	People	Operations	Utilities	Admin		Welcome sys		Help	Change	Password		Logo
Stops	Routes	Contractors	Contracts	Bulk co	ontract renewa	al							
Include		t and future contr	acts 👻			R	oute 111111 - Woburn	to	until	_			
Number Name		ictor name		5		_			- unu			[8	ctions ▼
Туре	All		•		etails Cost	Payment	s						
Route	route		Q. <b>X</b>	•	Costs								
		I	clear] Search		Revisions								
Contracto	or R	oute	Date		Date ≑	Daily cost	Daily asst. cost	Reaso	n		Statu	5	
	1:	11111 - Woburn		~	13/03/2017	1.00	0.00			N	lot processed	ł	
A1 Cars	SI	HAR13 - Sheltor			12/03/2017	5.00	0.00			N	lot processed	ł	
A1 Cars	М	ISC - Miscellane	ou 01/02/2001										
Archer Car	rrs Si	HAR1 - Clapham	, №28/04/1997										
Archer Car	rs 89	91GP - Woburn	to 1/06/2000										
Arrow Trav	/el SI	HAR4 - Oakley t	o 501/10/2000										
Arrow Trav	vel D'	WB3 - Domsday	D:07/06/2000										
Arrow Trav	/el G	A01 - Green Abl	bey 01/09/2006		add revision(s)	edit revision   d	elete revision ]						

3. Click the add revision(s) hyperlink to display the Create daily revision(s) dialog.

	Create daily revision(s)
Create revisions between	dd/mm/yyyy * and dd/mm/yyyy (optional)
Daily cost	(pounds) *
Daily asst. cost	(pounds)
Reason for revision(s)	

- 4. Enter the start date of the revision into the Create revisions between field.
- 5. If required, enter an end date for the revision into the **and** field.
- 6. Enter the revised **Daily cost** of the contract.
- 7. If required, enter a revised **Daily asst. cost**.
- 8. Enter a Reason for revision(s) as required.
- 9. Click the **Add** button to add the revision and close the dialog.

#### **Editing a Contract Revision**

- 1. Select a contract. For more information on selecting contracts, see <u>Selecting a Contract</u> on page *109.*
- 2. Select the **Costs** tab and open the **Revisions** section. A list of the contract's past and current revisions is displayed.
- 3. Highlight the revision that you want to edit and then click the **edit revision** hyperlink to display the **Edit revision** dialog.

	Edit revision										
Date	08/08/2014 *										
Daily cost	10 (pounds) *										
Daily asst. cost	(pounds)										
Reason for revision(s)											
	[ cancel ] Update	•									

- 4. Make the required edits.
- 5. Click the **Update** button to confirm your changes and close the dialog.

#### **Deleting a Contract Revision**

- 1. Select a contract. For more information on selecting contracts, see <u>Selecting a Contract</u> on page *109.*
- 2. Select the **Costs** tab and open the **Revisions** section. A list of the contract's past and current revisions is displayed.
- 3. Highlight the revision that you want to delete and then click the **delete revision** hyperlink. A confirmation dialog is displayed.

[one]	Processes	People	Operations
Stops	Routes	Contractors	Contracts
Include	Current	and future contr	racts
Number	Contra	ct number	
Name	Contra	ctor name	
Туре	All		
Route	route		Q
			[ clear ] Sear
Contracto		oute 1111 - Woburn	Date
1 Cars		IAR13 - Sheltor	
1 Cars	MI	SC - Miscellane	eou 01/02/200
rcher Carr		IAR1 - Clapham	
Archer Carr		1GP - Woburn	
Arrow Trave		IAR4 - Oakley t VB3 - Domsday	
Arrow Trave		01 - Green Abl	

4. Click the **Delete** button to delete the revision and close the dialog.

## **Managing Contract Budget Codes**

#### Adding a Budget Code to a Contract

- 1. Select a contract. For more information on selecting contracts, see <u>Selecting a Contract</u> on page *109.*
- 2. Select the **Costs** tab and then open the **Budget codes** section. A list of the contract's current and past budget codes is displayed.

[one] F	Processes	People	Operations	Utilities	Admin	Welcome sys	admin	Help	I.	Change Password	- I	Logout
Stops	Routes	Contractors	Contracts	Bulk	ontract renewal							
Include		and future contra	acts 👻			Route 111111 - Woburn 1		until				
Number	Contrac	ct number				Roule IIIII - Wobulli	10	unu	-		[ a	tions <b>v</b> ]
Name	Contrac	ctor name										
Туре	All		•		letails Costs	Payments						
Route	route		Q¥	: ,	Costs							
		[	clear] Search		Revisions							
Contractor	Ro	oute	Date		Budget codes							
		1111 - Woburn		^ Ť	Duugercoues	, 						
A1 Cars		AR13 - Shelton			Budget code &	description					%	
A1 Cars		SC - Miscellane			PRI - Primary Tr	ansport					10	
Archer Carrs		AR1 - Clapham										
Archer Carrs		1GP - Woburn t										
Arrow Trave		AR4 - Oakley to										
Arrow Trave		VB3 - Domsday										
Arrow Trave		.01 - Green Abb										
Arrow Trave		B001 - Abbey M			[ add budget code	edit budget code   remove budget co	de]					
Auckland Ta	xis SH	AR7 - Wymingt	on 01/01/2001							[can	el]S	ave

3. Click the **add budget code** hyperlink to display the **Add budget code** dialog.

Add budget	code
Choose budget code	* % *
	[ cancel ] OK

4. Select the budget code you want to add from the **Choose budget code** menu.

The **Choose budget code** menu only lists those budget codes that have already been configured in Transport. For more information on configuring budget codes, see <u>Configuring</u> <u>Budget Codes</u> on page *146*.

- 5. Enter a % value for the budget code. This is the percentage of the total cost which each of the budget codes will bear within the year for each contract.
- 6. Click the **OK** button to add the code to the contract and close the dialog.

#### **Editing Contract Budget Codes**

**NOTE:** You can only edit the budget codes of contracts that have had payments issued against them if the **Budget Codes After Payments** permission is set to R-W for your account. This permission is not required to edit the budget code of contracts that have not yet had any payments completed.

For more information on editing permissions, see the Managing Users, Groups & Permissions handbook, available from <u>www.onepublications.com</u> and My Account.

- 1. Select a contract. For more information on selecting contracts, see <u>Selecting a Contract</u> on page *109.*
- 2. Select the **Costs** tab and then open the **Budget codes** section. A list of the contract's current and past budget codes is displayed.
- 3. Highlight the budget code you want to edit and then click the **edit budget code** hyperlink to display the **Edit budget code** dialog.



- 4. Make the required changes.
- 5. Click the **OK** button to save your changes and close the dialog.

#### **Removing Contract Budget Codes**

- 1. Select a contract. For more information on selecting contracts, see <u>Selecting a Contract</u> on page *109.*
- 2. Select the **Costs** tab and then open the **Budget codes** section. A list of the contract's current and past budget codes is displayed.
- 3. Highlight the budget code you want to delete and then click the **remove budget code** hyperlink. A confirmation dialog displays.

Name	Contractor name			
Туре	All	•	Details Costs Payments	
Route	route	Q. <b>X</b>	> Costs	
		[clear] Search	> Revisions	
Contractor	Route	Date	✓ Budget codes	
	111111 - Woburr		A Budget codes	
A1 Cars	SHAR13 - Shelto		Budget code & description	%
A1 Cars	MISC - Miscellane	eou 01/02/2001	SEC - Secondary Transport	100
ani10 - ani10	567 - test	01/10/2014		
ani10 - ani10	test21 - test	02/10/2014		
Archer Carrs	891GP - Woburn	to (01/06/2000		
Arrow Travel	SHAR4 - Oakley	to 501/10/2000		
Arrow Travel	DWB3 - Domsday	/ D:07/06/2000		
Arrow Travel	GA01 - Green Ab	bey01/09/2006	[ add budget code   edit budget code   remove budget code	
Arrow Travel	ABB001 - Abbey	Mid 02/10/2000		[cancel] Save

4. Click the **Delete** button to remove the code and close the dialog.

## **Viewing Payments Against a Contract**

- 1. Select a contract. For more information on selecting contracts, see <u>Selecting a Contract</u> on page *109.*
- 2. Select the **Payments** tab. A list of all payments made against the selected contract is displayed.

Include	Current and future contracts	•						
Number	Contract number		Arrow Travel	Arrow Travel Route SHAR4 - Oakley to		01/10/2000 unt	til	[actions ¥]
Name	Contractor name							
Туре	All	•	Details Costs	Payments				
			Invoice reference	Route code & description	Period from	Until	Due on	Net amount
Route	route	QX	EMS2	SHAR4 - Oakley to Sharnbroo	01/10/2002	31/10/2002		4,140.00

**NOTE:** To add a new contract payment, click the **add new payment for this contract** hyperlink. The **Operations | Contractors | Payments** screen is displayed, with the selected contract pre-populated in the **Contract** field. For more information on generating contract payments, see <u>Managing Contractor</u> <u>Payments</u> on page 106.

## **Renewing Contracts in Bulk**

1. Select the **Operations** area and open the **Bulk contract renewal** page. Selection fields relating to contract details are displayed.

[one]	Processes	People	Operations	Utilities	Admin		Welc	ome				Help	Change Password	Logout
Stops	Routes	Contractors	Contracts	Bulk con	tract renev	val								
Ren	ew all contract fo	or contra	actor		Q.X.*	between	dd/mm/yyyy	*	and	dd/mr	n/vvvv	i i		Preview

- 2. Search for the contracts you want to renew:
  - a. Select a contractor from the Renew all contract for browse.
  - b. Enter a start date for the contracts into the between field.
  - c. If required, enter an end date for the contracts into the and field.
  - d. Click the **Preview** button. A list of the affected contracts is displayed.

#### Managing Contractors and Contracts

[one]	Processes	People	Operations	Utilities A	dmin		Wel	come	sysadmin	Help	)	Change Pa	issword	Logo
Stops	Routes	Contractors	Contracts	Bulk contrac	t renew.	al								
Rer	new all contract for	Aucklan	nd Taxis		2,≍*	between	02/01/2017	*	and dd/mn	n/yyyy				Preview
Cor	ntract number	*	Route code &	description								From	Until	
			STEVE1 - Wobu	urn to Cedars Up	per Scho	ol						01/06/2000		
			SHAR7 - Wymi	ngton and Poding	gton to S	harnbrook	US					01/01/2001		
			SHAR7 - Wymi	ngton and Poding	gton to S	harnbrook	US					01/09/2001		
Start new	contracts on	dd/mm/yyyy	* and end o	n dd/mm/yy	уу	or take e	nd date from ex	sting co	ontracts					
End exist	ing contracts beau	ause	End of contract	•	and	start new c	ontracts becaus	е	New/Firs	t Contract		•		
Apply a p	rice change of		* % round	ed to the nearest	s	elect	• *	to	Daily cost, [	Daily asst. c	ost, Mon	thly cost and S	eason cost	•
												[clear] Ren	ew selected	contracts

- 3. Select the check boxes next to the contracts you want to renew. Alternatively, select the topmost check box to select all contracts in the list.
- 4. Enter a valid date into the Start new contracts on field.
- 5. Select an end date for the new contracts. There are two ways you can do this:
  - Enter a valid date into the and end on field.
  - Select the take end date from existing contracts check box.
- 6. Select a reason for ending the existing contracts from the **End existing contracts because** menu.
- 7. Select a reason for starting the new contracts form the start new contracts because menu.
- 8. Enter price change details for the new contracts:
  - a. Enter the percentage value you want to change the contract by into the **Apply a price change of** field. This value can be either positive or negative.
  - b. Select a rounding denomination from the rounded to the nearest menu.
  - c. Select the applicable costs from the to menu.
- 9. Click the **Renew** select contracts button to renew the selected contracts. A confirmation dialog is displayed.

# **06** Using the Actions Menu

The **actions** menu is found in several locations within One Transport. It comprises a suite of functions which are common to most entities within the database, such as the ability to add popup alerts or link documents. The menu becomes available once you have selected an entity, for example by selecting a person through **People | Personal info** or a contractor through **Operations | Contractors**.

[one] Processes	People	Operations L	Itilities Admin	Welcome sysardmin	Help   Change	Password   Logou
Single passenger	Multiple passe	engers Bulk tr	ansfer			
Personal info Proces	s status					
Search for Active pe	ople in this autho	ority 🔹		and ground	and internet	[actions ♥]
	clear   show all		[Passenger info   Personal in	fo   Driver / assistant info ]		Maintain alerts
Name	DOB	Postcode				Linked documents
COMPANY OF THE OWNER OF T		^	Applications Assessm	ents Journeys Tickets	Invoices Payments out	Entity history
			Date 🛊	Address	Destination	Sql mail merge
	( the second sec					Reports
Concession and	1.10.100					View communications
						Create communication
		CONTRACTOR OF			1	
and formed as		a designed	[ create new application   dele	ite ]		

The Actions menu

# **Managing Alerts**

Alerts are context-specific pop-up messages that are displayed when an entity is selected. One Transport enables you to configure internal alerts for use within the transport system itself.

It is also possible to create system wide alerts within One. For more information on creating system wide alerts see the *RG\_Administration\_Alerts* reference guide, available from <u>www.onepublications.com</u> and My Account.

#### **Creating an Alert**

1. Open the **actions** menu and select the **Maintain alerts** menu option to display the **Maintain alerts** dialog.

Maintain Alerts	Add Alert
No Alerts to edit	
	Close

2. Click the Add Alert button to display the Add dialog.

Add	
Alert	
Expiry Date	li
dd/mm/yyyy	
	Close

- 3. Enter the alert text into the Alert field.
- 4. If required, enter an **Expiry Date**.
- 5. Click the **Save** button.

#### **Editing an Alert**

1. Open the **actions** menu and select the **Maintain alerts** menu option to display the **Maintain alerts** dialog.

Maintain Alerts	Add Alert
Alert successfully added!	×
Test Expires on 23/08/2014	X
Test Expires on 22/08/2014	× ×
	Close

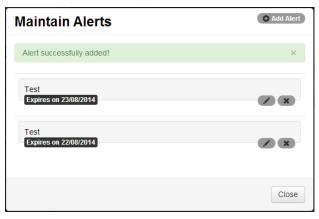
2. Click the **Edit** button for the alert you want to edit. The **Edit** dialog is displayed.

Edit	
Alert	
Test	
Expiry Date	
23/08/2014	
	Close

- 3. Make the required changes.
- 4. Click the **Save** button to save your changes.

#### **Deleting an Alert**

1. Open the **actions** menu and select the **Maintain alerts** menu option to display the **Maintain alerts** dialog.



2. Click the **Delete** button for the alert you want to delete. The **Do you want to delete this Alert?** dialog is displayed.

Do you want to delete this A	\lert?
Alert Test	
Expiry Date	
23/08/2014	
	Close Delete

3. Click the **Delete** button to delete the alert.

```
NOTE: SQL and trigger alerts defined in One v4 are also displayed when transport entities are selected.
```

### **Managing Linked Documents**

You can use the **actions** menu to link documents to entities within One Transport. For example, you might link a scan of a signed paper contract to the equivalent One Transport contract record.

#### Linking a Document

1. Open the actions menu and select the Linked documents menu option to display the Documents linked to dialog.

	Do	ocuments linked to	COMPANY OF TAXABLE	
File Descr	iption	File Name	Linked By	On
open this docum	nent   link a nev	v document   update docum	ant [ remove link ]	
open this docum		v document   update document	ant   remove link ]	
			ant [ remove link ] Copy to Database	
Description				V

- 2. Click the link a new document hyperlink to display the Open dialog.
- 3. Select the document that you want to add and then click the **Open** button.
- 4. Enter a **Description** for the document.
- 5. Click the **Save** button to upload and link the document to the person's record.

#### **Updating a Linked Document**

- 1. Open the **actions** menu and select the **Linked documents** menu option to display the **Documents linked to** dialog.
- 2. Highlight the document you want to update.

File Descripti	ion File Name	Linked By	On
ransport	Transport SAD.docx	System Administrator 10/1	0/2014
men this document	Link a new document Lundate docu	ment I remove link ]	
	link a new document   update docu	ment   remove link ]	
open this document	link a new document   update docu Transport	ment   remove link ]	2

- 3. Click the **update document** hyperlink to display the **Open** dialog.
- 4. Select the updated version of the document and then click the **Open** button.
- 5. Click the **Save** button. A confirmation dialog is displayed.
- Click the Yes button to replace the old version of the document with the updated version.
   Opening a Linked Document
- 1. Open the **actions** menu and select the **Linked documents** menu option to display the **Documents linked to** dialog.
- 2. Highlight the document you want to open.

	Documents linked to		
File Descr	ption File Name	Linked By	On
ansport	Transport SAD.docx	System Administrator 10/1	10/2014
en this docum	ent   link a new document   update docu	ment   remove link ]	
een this docum	ent   link a new document   update docu Transport	ment   remove link ]	
		ment   remove link ] Copy to Database	V
Description	Transport		Y
Description	Transport		V

3. Click the **open this document** hyperlink to download a copy of the document.

#### **Deleting a Linked Document**

- 1. Open the **actions** menu and select the **Linked documents** menu option to display the **Documents linked to** dialog.
- 2. Highlight the document you want to delete.

		Documents linked to		
File Descr	iption	File Name	Linked By	On
ransport		Transport SAD.docx	System Administrator 10/	10/2014
open this docum	ent   link a r	new document   update docu	ment   remove link ]	
Description	Transp	ort		
		on		
File Name	Transp	ort SAD.docx	Copy to Database	V
File Name	Transp		Copy to Database	V
File Name	Transp			ancel ] C

- 3. Click the **remove link** hyperlink. A confirmation dialog is displayed.
- 4. Click the **Yes** button to delete the document.

# **Viewing the Entity History**

The Entity History is a log of all changes made to an entity. For example, the Entity History for a passenger shows the times that that person's details were updated in One Transport, and which user updated them.

Entity History					
Person	# · EntityId	Action Performed	User Name	Timestamp	Note
	17279081107	Updated	SYSADMIN	10/10/2014 16:09:33	Linked Document Added
	1728 9081107	Updated	SYSADMIN	10/10/2014 16:13:06	Linked Document Updated

To open the Entity History dialog, open the **actions** menu and select the **Entity history** menu option.

## Performing an SQL Mail Merge

- 1. Open the **Actions** menu and select the **Sql mail merge** menu option. The **SQL mail merge** dialog is displayed, showing a list of available SQL queries.
- 2. Select the query you want to run.
- 3. Choose an action:
  - To display the results of the query in your browser, click the **preview** hyperlink.
  - To export the results of the query to an XLS file, click the export hyperlink.

**NOTE:** You must have One's SQL Mail Merge function configured in order to run SQL queries from One Transport. For more information on configuring SQL Mail Merge see the RG\_Administration\_SQL Mail Merge.pdf reference guide, available from <u>www.onepublications.com</u> and My Account.

## **Running Linked Reports**

Linked reports are reports that are linked to a particular screen in One. For a full list of linked reports and their locations in One Transport v4 see <u>Appendix A</u>.

For information on configuring linked reports see the v4 Linked Reports Handbook, available from <u>www.onepublications.com</u> and My Account

- 1. Open the **actions** menu and select the **Reports** menu option to display the **Which report** would you like to run? dialog.
- 2. Highlight the report you want to run.

	Which report would you like to run? Your report results will be shown in a new browser tab.
Name	Description
Contractor Details	
No records to view	< prev   next >
	[ cancel ] Run report

3. Click the **Run report** button to run the report.

## **Managing Communications from the Actions Menu**

You can use the **actions** menu to quickly view or create communications related to a selected person.

#### **Viewing a Selected Person's Communications**

- 1. Select a person. For more information on selecting a person, see <u>Selecting a Person</u> on page *42*.
- 2. Open the **actions** menu and select the **View communications** menu option to display the **View communications** dialog.



- 3. Use the check boxes to select the type of communication you want to view. You can view communications that are **To**, **From**, **Cc** or **About** the selected person.
- 4. Click the **View** button to display the **People | Communications & complaints** page, showing a list of communications that match your search criteria. For more information on working with communications in **People | Communications & complaints** see <u>Managing Communications</u> on page *69*.

#### **Creating a Communication via the Actions Menu**

- 1. Select a person. For more information on selecting a person, see <u>Selecting a Person</u> on page *42*.
- 2. Open the **actions** menu and select the **Create communication** menu option to display the **Create communication** dialog.



- 3. Use the drop-down menu to select whether the new communication should be **From**, **To**, **Cc** or **About** the selected person.
- 4. Click the Create button to display the People | Communications & complaints page with the create new communication menu open and the selected person's details already populated. For more information on creating a new communication in the People | Communications & complaints page, see <u>Recording a Communication</u> on page 71.

# 07 Utilities

The **Utilities** area contains a range of tools to help you in the day-to-day running of One Transport. This chapter also covers the **Memo** function, which can be found throughout One Transport.

## Adding an Address to the Address Catalogue

The Address Catalogue enables you to create and update addresses from within the Transport module. Addresses created within One Transport are accessible throughout One.

1. Select the Utilities area and select the Address catalogue tab.

[one]	Processes	People	Operations	Utilities	Admin		Welcome sysadm		Help	Change Password	Logout
Addres	s catalogue	Nearest sc	hools Bulk	print	Job manager	RO import	Budget forecast	Report	s SSRS		
Postcoo	le	Postcode									
Street a	ddress	Street address									
			[clear] Sear	ch							
					Details Map	& GeoLocation					 

- 2. Enter the **Postcode** of the address you want to create and click the **Search** button. A list of current addresses with that postcode is displayed.
- 3. Click the create new address hyperlink to display the Create a new address in an existing street page.

[one]	Processes	People	Operations	Utilities	Admin		Welcome sysad	min	Help	Ι	Change Pas	sword	T	Logout
Address	s catalogue	Nearest scho	ools Bulk p	rint Jo	ob manager	RO import	Budget forecast	Repo	rts S	SRS				
							Create a new add	ress in a	n existi	ng str	reet			
							New addresses are use	· ·		-				
					1	Even if you want to	create a new street, you	i must still fi	rst check I	here that	t it doesn't alread	dy exist.		
						Street		MK40			Find streets	[cancel]		

4. Enter the **Street address** and **Postcode** of the address you want to create and then click the **Find Streets** button. A list of existing streets that match your criteria is displayed.

[one]	Processes	People	Operations	s <mark>Utili</mark> t	ties Admin		Welcome sysadm		Help		Change Password		Logout
Address	catalogue	Nearest sch	nools Bu	ulk print	Job manager	RO import	Budget forecast	Report	s SS	RS			
					Choo	ose an existing	street below, then	compl	ete the (	detail	s of the new addre	ss	
					Dame Alice Street,	Bedford,MK40 1	BS						
					Ashburnham Road	Bedford,MK40 1,	DR						
					Greyfriars, BEDFOR	D,Simshire,MK4	D 1HJ						
					Priory Street,Bedfo	ord,MK40 1HS							
					Allhallows,Bedford	,MK40 1LT							
					Midland Road,Bedf	ord,MK40 1PL							
					Horne Lane,Bedfor	d,MK40 1PZ							
					Prebend Street,Be	dford,MK40 1QN							
					High Street,Bedfor	d,MK40 1RN							
					Silver Street,Bedfo	ord,MK40 1SY							
					MK40 2AB								~
					[ try a different postco	de or street name	create an address in a ne	w street i	nstead   ca	ncel]			

You must use the Find Streets function even if you intend to create a new street.

- 5. If the new address's street is included in the search results:
  - a. Highlight the street to display editable fields related to address details.

Address catalogue	Nearest schools	Bulk print	Job manager	RO import	Budget forecast	Reports		
			Choo	se an existing	g street below, the	n complete the	e details of the new address	
			Goldington Green,B	edford,Beds,MK	(41 0AA			
			Kershope Close,Bed	lford,Bedfordshi	ire,MK41 0AQ			
			Goldington Road,Be	dford,MK41 0D	S			
			Wild Acre, Top End,	Renhold,Bedford	I,MK41 OLR			
			Church End,Renhold	d,BEDFORD,Sim	ishire,MK41 OLU			
			Church Lane,Goldin	gton,BEDFORD,	Simshire,MK41 0PF			
			Harpenden Street V	Ve,Off London R	toad,Goldington,Bedfo	rd,MK41 OTD		
			Honeysuckle Way,B	edford,MK41 0T	ſF			
			High Street,Bedford	I,MK41 2LK				
			Church Street,Bedf	ord,MK41 3GH				
			Green Park,Bedford	,MK41 5KF				~
			[ try a different postcod	ie or street name	create an address in a n	ew street instead	cancel ]	
			Unique to this	s address				
			Building number			UPRN		
			Building name			OSAPR		
			Apartment			LA	Please select	
			Phone number					
			Shared with o	ther address				
			Street address	Honeysuckle V	Way,Bedford,MK41 0TF			
						[Cancel] Cr	reate this address in the existing street ab	ove

- b. Enter a Building number, Building name or Apartment for the address.
- c. Enter **Phone number** and **LA** details as required.
- d. Click the Create this address in the existing street above button to create the address.
- 6. If the street does not yet exist in the address catalogue:
  - a. Click the **create an address in a new street instead** hyperlink. Editable fields related to address details are displayed.

Address catalogue	Nearest schools	Bulk print	Job manager	RO import	Budget forecast	Reports	
		i			Create	new street?	
				Are you rea	ally sure you want to	create an address	s in a new street?
					If so, complete all	applicable fields be	elow.
					[go back to	o existing streets ]	
			Unique to thi Building number Building name Apartment	is address		UPRN OSAPR LA -	- Please select
			Phone number				
			Shared with	other address	5		
			Street name (1)			Street name (2)	
			District/village			Town/city	
			County			Country	- Please select
			Postcode	mk41		USRN	
						I	Create this address in a new street

- b. Enter a Building number, Building name or Apartment for the address.
- c. Enter **Phone number** and **LA** details as required.
- d. Enter a Street name for the new street.

- e. Enter **District/ village**, **Town/ city**, **County**, **Country** and **Postcode** information for the new street as required.
- f. Click the Create this address in a new street button to create the address.

## **Editing an Address**

1. Select the **Utilities** area and select the **Address catalogue** tab.

[one]	Processes	People	Operations	Utilities	Admin		Welcome <b>sysadı</b>		Help	Change Password	Logout
Address	catalogue	Nearest so	hools Bulk	print J	lob manager	RO import	Budget forecast	Reports	SSRS		
Postcode		Postcode		5							
Street ad	Idress	Street address.									
			[clear] Sear	ch							
				-							
				D	etails Map	& GeoLocation					

- 2. Enter a **Postcode** or **Street address** details and then click the **Search** button to display a list of matching addresses.
- 3. Highlight the address you want to edit.

2, Back Lane, Jackson, Alphatown, Perfshire, 29 OCA				
3, Back Lane, Jackson, Alphatown, Perfshire, Z9 0CA	Details Map &	GeoLocation		
4, Back Lane, Jackson, Alphatown, Perfshire, Z9 0CA	Unique to this	address		
5, Back Lane, Jackson, Alphatown, Perfshire, Z9 0CA		( <b>r</b>		
6, Back Lane, Jackson, Alphatown, Perfshire, Z9 0CA	Building number	5	UPRN	
7, Back Lane, Jackson, Alphatown, Perfshire, Z9 0CA	Building name		OSAPR	
8, Back Lane, Jackson, Alphatown, Perfshire, Z9 0CA	Apartment			Please select
9, Back Lane, Jackson, Alphatown, Perfshire, Z9 0CA	Apartmont			
10, Back Lane, Jackson, Alphatown, Perfshire, Z9 0CA	Phone number			
11, Back Lane, Jackson, Alphatown, Perfshire, Z9 0CA				[Cancel] Save
12, Back Lane, Jackson, Alphatown, Perfshire, Z9 0CA	Shared with o	ther address		
13, Back Lane, Jackson, Alphatown, Perfshire, Z9 0CA	Shared with 0	uler address		
14, Back Lane, Jackson, Alphatown, Perfshire, Z9 0CA	Street name (1)	Back Lane	Street name (2)	
15, Back Lane, Jackson, Alphatown, Perfshire, Z9 0CA	District/village	Jackson	Town/city	Alphatown
16, Back Lane, Jackson, Alphatown, Perfshire, Z9 0CA				
17, Back Lane, Jackson, Alphatown, Perfshire, Z9 0CA	County	Perfshire	Country	Please select
18, Back Lane, Jackson, Alphatown, Perfshire, Z9 0CA	Postcode	Z9 0CA	USRN	
19, Back Lane, Jackson, Alphatown, Perfshire, Z9 0CA				[Cancel] Save
20, Back Lane, Jackson, Alphatown, Perfshire, Z9 0CA				[Ouncer] and

- 4. Ensure that the **Details** tab is selected. Editable fields related to address details are displayed.
- 5. Make the desired changes. The **Details** tab comprises two sections:
  - Unique to This Address: Details which are only relevant to the address in question, such as house name or number.
  - Shared With Other Address: Details which are relevant to multiple addresses in the catalogue, such as street name.
- 6. Click the Save button on each section you have changed to save your changes.

### Viewing an Address on a Map

1. Select the **Utilities** area and select the **Address catalogue** tab.

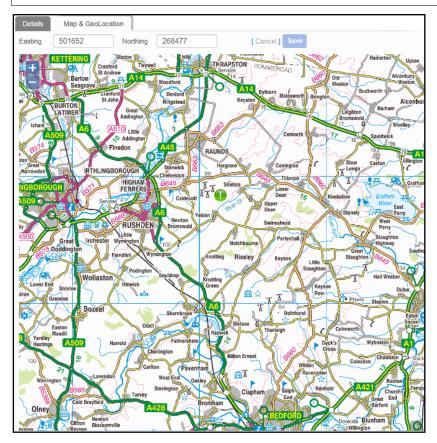
[one] Proce	esses	People	Operations	Utilities	Admin		Welcome sysad		Help	Change Password	Logout
Address catal	ogue	Nearest sc	hools Bulk p	orint J	ob manager	RO import	Budget forecast	Reports	SSRS		
Postcode	Pos	stcode		3							
Street address	Str	eet address									
			[clear] Sear	ch							
					atails Map	& GeoLocation					
					nans map	& Geolocalion					_

- 2. Enter a **Postcode** or **Street Address** details for the address you want to view and then click **Search** to display a list of matching addresses.
- 3. Select the address you want to view.

Address catalogue	Nearest schools	Bulk print	Job manager	RO import	Budget forecast	Reports		
Postcode Street address	z9 Street address		5 Back Lane Jackson Alphatown					
	[ cle	ar] Search	Perfshire Z9 0CA					
Address 🗢								
1, Back Lane, Jacks	on, Alphatown, Perfshire	, Z9 0CA						
2, Back Lane, Jacks	on, Alphatown, Perfshire	, Z9 0CA		_				
3, Back Lane, Jacks	on, Alphatown, Perfshire	, Z9 0CA	Details Map &	GeoLocation				
4, Back Lane, Jacks	on, Alphatown, Perfshire	, Z9 0CA	Unique to thi	s address				
5, Back Lane, Jacks	on, Alphatown, Perfshire	, Z9 0CA		-				
6, Back Lane, Jacks	on, Alphatown, Perfshire	, Z9 0CA	Building number	5		UPRN		
7, Back Lane, Jacks	on, Alphatown, Perfshire	, Z9 0CA	Building name			OSAPR		
8, Back Lane, Jacks	on, Alphatown, Perfshire	, Z9 0CA	Apartment				Please select	
9, Back Lane, Jacks	on, Alphatown, Perfshire	, Z9 0CA	, partition					
10, Back Lane, Jack	son, Alphatown, Perfshir	re, Z9 0CA	Phone number					
11, Back Lane, Jack	son, Alphatown, Perfshir	re, Z9 0CA						[Cancel] Save
12, Back Lane, Jack	son, Alphatown, Perfshir	re, Z9 0CA	Shared with	other address				
13, Back Lane, Jack	son, Alphatown, Perfshir	re, Z9 OCA	charca mar					
14, Back Lane, Jack	son, Alphatown, Perfshir	re, Z9 OCA	Street name (1)	Back Lane		Street name (2)		
15, Back Lane, Jack	son, Alphatown, Perfshir	re, Z9 0CA	District/village	Jackson		Town/city	Alphatown	
16, Back Lane, Jack	son, Alphatown, Perfshir	re, Z9 OCA						
17, Back Lane, Jack	son, Alphatown, Perfshir	re, Z9 OCA	County	Perfshire		Country	Please select	
18, Back Lane, Jack	son, Alphatown, Perfshir	re, Z9 OCA	Postcode	Z9 0CA		USRN		
19, Back Lane, Jack	son, Alphatown, Perfshir	re, Z9 OCA						[Cancel] Save
20, Back Lane, Jack	son, Alphatown, Perfshir	re, Z9 0CA						[omeoil one

4. Select the Map & GeoLocation tab to view the address on a map.

**NOTE:** You can also set or change an address's easting and northing geocodes from the **Map & GeoLocation** tab. To do so, enter values into the **Easting** and **Northing** fields and then click the **Save** button.



## **Searching for Nearest Schools by Location**

The **Utilities** | **Nearest schools** page enables you to view the schools that are nearest to a particular address. Distances are calculated using GIS.

In One Transport v4 you can select the part of the school you want to measure distance to.

- 1. Select the **Utilities** area.
- 2. Ensure that the **Nearest schools** page is selected.

[one] [	Processes People Operation	s Utilities	Admin	Welcome syxadmin	Help	Change Password	- E	Logout
Personal in	fo Driver / assistant info Cor	nmunications &	complaints					
Find the	5 🔹 active 🗹 scl	nools No	School Selected					
for NCY	All	•						
whose	any site	•						
is nearest	Select an address	a.						
by	direct distance	•						
	[Centre map on this location]							
include	only home LA bases	•						
of type(s)	any base types	•						
	(Bases within catchment are also include	17. Contraction of the second						

- 3. Select the number of search results you want to receive from the **Find the** menu.
- 4. If you want to limit your search to active bases, select the Active check box.
- 5. Select an NCY.
- 6. Select the address whose nearest schools you want to find:
  - a. Click the is nearest browse to open the Choose an address dialog.

		Choose an addres	s	
Looking for	þ5 <b></b>		×	Search
		Address 💠		
65				
View 1 - 1 of	1		< prev   ne	xt >
			[cancel] Select thi	e orkfræce

- b. Enter a postcode or address line into the search bar and then click the **Search** button to search for matching addresses.
- c. Highlight an address and then click the **Select this address** button to select the address and close the dialog.
- 7. If required, select a measurement point from the **whose** drop-down menu. The available options are:

Utilities

- any site
- any gate
- any gate or any site
- any gate, or site if no gate
- principal site
- main gate
- 8. Select the distance measurement method you want to use from the **by** menu. The options are **direct**, **driving** and **walking**.

**NOTE:** If you search for the nearest school by driving distance and One cannot calculate a driving distance, then One does not display walking or direct distances either. This is because the lack of a driving distance means that One cannot select the site or gate to measure to. Likewise, One will not return driving or direct distances if you search by walking distance and a walking distance cannot be calculated.

In this circumstance, you should rerun the search using an alternative measurement method in order to get the distances you require.

- 9. Enter include and base types information as required.
- 10. Click the **Search** button to view a list of the nearest schools to the selected address and the locations of the schools on a map.
- 11. Highlight a school to select it. The school's details are displayed on the toolbar and its location is highlighted on the map.

## **Printing Tickets in Bulk**

The **Utilities | Bulk print | Tickets** page enables you to print tickets in bulk. It is also possible to print tickets at the point of issue. For more information on printing tickets at the point of issue, see <u>Creating a Ticket</u> on page 22 and <u>Creating Journeys in Bulk</u> on page 36.

- 1. Select the **Utilities** area and open the **Bulk print** page.
- 2. Select the **Tickets** tab. A list of editable fields related to ticket details is displayed.

[one]	Processes	People	Operations U	tilities Admin		Welcome sysad		Help	Change Password	Logout
Address	catalogue	Nearest schoo	ols Bulk print	Job manager	RO import	Budget forecast	Reports	SSRS		
Tickets	Invoices									
Selec	t all	unprinted ticke	ets							
Serial	l prefix	prefix								
Serial	l number	number	to numbe	r						
Starti	ng Between	dd/mm/yyyy	and dd/mm	Луууу						
Contr	actor(s)				Q. <b>X</b>					
Route	e(s)	route			Q. <b>X</b>					
Ticke	t design	choose ticket o	design							
[ marl	k tickets as printe	ed without printing	mark tickets as unpr	nted ]			1	Send tickets	for printing and mark the	em as printed 🔽

- 3. Select a ticket print status from the Select all menu.
- 4. Enter Serial prefix, Serial number, Starting Between, Contractor(s), and Route(s) details as required.
- 5. Select a **Ticket design** for the printed tickets.
- 6. If you want to mark the tickets as printed once you print them, select the **and mark tickets as printed** check box.

7. Click the **Send tickets for printing** button to send the tickets for printing. An entry is made in the entity history to show that the ticket was printed.

**NOTES:** To mark tickets as printed without printing them, enter selection criteria for the tickets and click the **mark tickets as printed without printing** hyperlink.

To unmark tickets as printed, enter selection criteria for the tickets and click the **mark tickets as unprinted** hyperlink.

# **Printing Unpaid Invoices in Bulk**

- 1. Select the **Utilities** area and open the **Bulk print** page.
- 2. Select the **Invoices** tab. Editable fields related to invoice details are displayed.

[one]	Processes	People O	perations	<mark>Jtilities</mark> Admin		Welcome <b>sys</b> ia	lmin 1	Help	Change Password	I.	Logout
Address	catalogue	Nearest schools	Bulk prin	t Job manager	RO import	Budget forecast	Reports	SSRS			
Tickets	Invoices										
Print all ur	npaid invoices wi	th serial prefix	prefix	and serial number b	etween	umber and	number		Send invoid	æs for p	rinting

- 3. Enter the serial prefix of the unpaid invoices that you want to print into the **Print all unpaid invoices with serial prefix** field.
- 4. Enter the serial number range of the invoices you want to print into the **serial number between** and **and** fields.
- 5. Click the Send invoices for printing button to print the invoices.

**NOTE:** The **Utilities | Bulk Print | Invoices** function can only be used to print unpaid invoices. There is no function to bulk print paid invoices.

## **Managing Running Jobs**

The **Utilities | Job manager** page enables you to see details of any bulk processing jobs that are due to be run or have been run recently. You can also use the Job Manager to cancel pending jobs.

#### **Viewing Running Jobs**

1. Select the **Utilities** area and select the **Job manager** page.

[one]	Processes	Peop	ole Op	erations	Utilities	Admin			Welcome sym	dimin 1	Help	Change F	assword	Logou
Address	s catalogue	Neares	st schools	Bulk prin	nt <mark>Job</mark>	manager	RO imp	ort	Budget forecast	Reports	SSRS			
Show	my jobs	• s	ubmitted in	1 week		•	of type	all type	es	•	Refre	sh		
		De	scription				Job Type		Status	Progress	Schedul	ed Date 👙	Status C	hanged
Bulk Tic	ket Processing					Bulk	ssue tickets		Completed	0.0	0 10/03/2017	13:22:37	10/03/201	7 13:22:37

- 2. Select whether you want to view all jobs or just your own jobs from the Show menu.
- 3. Select a submission time limit for your job search from the **submitted in** menu. The options are: **All, 1 week, 2 weeks** or **3 weeks**.
- 4. Select a job type from the **of type** menu and then click the **Refresh** button. A list of jobs that meet your search criteria is displayed.

**NOTE:** To view reports linked to a job, click the **view linked reports** hyperlink and select a report from the **Which report would you like to run?** dialog.

#### **Cancelling Running Jobs**

1. Select the Utilities area and select the Job manager page.

Address	catalogue	Nearest s	chools	Bulk print	Job manager	RO imp	bort Budget forecas	t Reports	SSRS	
Show	my jobs	• subn	itted in	1 week	•	of type	all types	• )	Refresh	
		Desc	iption			Job Type	s Status	Progress	Scheduled Date 😜	Status Changed
Bulk Tick	ket Processing	1			Bulk	issue tickets	Completed	0.00	10/03/2017 13:22:37	10/03/2017 13:22:3

- 2. If required, use the **Show**, **submitted in** and **of type** fields to search for a specific job.
- 3. Highlight the job you want to cancel and then click the **Cancel job** button. A confirmation dialog is displayed.
- 4. Click the Yes button to cancel the job.

## Managing the Route Optimisation Log

RAVA and SEN VM are third party products supplied by Higher Mapping Solutions.

Transport Route and Vehicle Allocation (RAVA) automatically generates optimum routes for the LA to accommodate children on specific vehicles. SEN Vehicle Management (VM) enables you to manage the allocation of students with special transport needs to vehicles and routes.

The **RO** (Route Optimisation) **import** page enables you to view the import jobs that run between RAVA / SEN VM and One Transport. These details can be found in the **Import Log** section at the top of the page.

The **Status** field displays a code indicating whether the job was successful or not. This field has three values:

- **S Success:** The RO data was imported successfully
- W Warning: The data was imported with warning messages.
- **F Failure**: The data was not imported.

#### **Clearing unprocessed RO transactions**

The **clear selected unprocessed transactions** function enables you to remove unprocessed RO transactions from the system. This function is used to purge transactions that have failed.

- 1. Select the **Utilities** area and select the **RO import** page.
- 2. Highlight the processes you want to clear in the **Unprocessed route data** section. Alternatively, select the topmost check box to select all processes.
- 3. Click the clear selected unprocessed transactions button to clear the selected transactions.

## **Allocating Budgets**

1. Select the **Utilities** area and select the **Budget forecast** page.

Show budget allocation for finan	cial year 2014/2014 •	Generate forecast for selected codes	as a summary of the whole year	
Code 🗢	Description	Amount		
CHER	Allowances	0		
MED	Medical Transport	0		
PRI PRI	Primary Transport	0		
SEC SEC	Secondary Transport	0		
SPEC SPEC	Special Transport	0		
SS SS	Social Services	0		
TEST	Test Category	0		

2. From the **Show budget allocation for financial year** drop-down menu select the financial year for which you want to allocate a budget.

**NOTE:** For information on adding new budget codes to the list, see <u>Configuring Budget Codes</u> on page 146.

3. Highlight a budget code. The Budget code and Amount fields are displayed.

SEC	Secondary Transport	0	
SPEC SPEC	Special Transport	0	
SS SS	Social Services	0	
TEST	Test Category	0	
Budget code TES	T Amount 0 *		
			[cancel] Save

- 4. Enter the amount that you want to allocate to that code into the **Amount** field. Click the **Save** button to save the amount.
- 5. Repeat steps 3 and 4 for all codes that you want to allocate budget for.

## **Generating Budget Forecasts**

1. Select the Utilities area and select the Budget forecast page.

[one]	Processes	People O	perations Ut	<mark>ilities</mark> Admin		Welcome sysada	iin   H	lelp	Change Password	Logout
Addr	ess catalogue	Nearest schools	Bulk print	Job manager	RO import	Budget forecast	Reports	SSRS		
Show	budget allocation for	financial year	2016/2017	•		Generate forecast for select	ed codes	as	a summary of the whole y	ear 🔻
	Code 🗢	Descri	ption			Amount				
	CHER	Allowar	ices			0				
	MED	Medical	Transport			0				
	PRI	Primary	Transport			0				
	SEC	Second	ary Transport			0				
	SPEC	Special	Transport			0				
	ss	Social S	Services			0				
	TEST	Test Ca	tegory			0				

2. From the **Show budget allocation for financial year** drop-down menu select the financial year for which you want to allocate a budget.

**NOTE:** For information on adding new budget codes to the list, see <u>Configuring Budget Codes</u> on page 146.

- 3. Highlight the budget codes you want to generate a forecast for.
- 4. Select whether you want to view the forecast **as a summary of the whole year** or **including monthly breakdowns** from the drop-down menu at the right of the screen.

ear 2014/2014 👻	Generate forecast for selected codes	as a summary of the whole year 🔹
Description	Amount	as a summary of the whole year 🛛 🖌
Allowances	0	including monthly breakdowns
Medical Transport	0	
Primary Transport	0	
Secondary Transport	0	
Special Transport	0	
Social Services	0	
Test Category	0	
	Description Allowances Medical Transport Primary Transport Secondary Transport Special Transport Social Services	Description     Amount       Allowances     0       Medical Transport     0       Primary Transport     0       Secondary Transport     0       Special Transport     0       Social Services     0

5. Click the **Generate forecast for selected codes** button to generate a forecast report including income and contract revisions.

# **Running Reports**

1. Select the Utilities area and select the Reports tab. A list of reports is displayed

Which report would you li	
Your report results will be shown in a	new browser tab.
Name	
A&T Appeals	
Contractor Details	
Contractor Payments	
InvalidDriverAssistantJourneysReport	
InvalidPassengerJourneysReport	
paramtest	
Route Stops	
Student Journeys	
Test Report Parameters	
transport_5.3	
View 1 - 10 of 10	
View 1 = 10 of 10	<pre>&lt; prev   next &gt;</pre>

2. Highlight the report you want to run and click the **Run report** button to run the report.

**NOTE:** One Transport reports can be created in SSRS and Crystal Reports. For a high-level overview of report authoring in One, see the Report Authoring in CCS Enterprise Architecture technical guide, available from <u>www.onepublications.com</u> and My Account.

## **Recording Memos**

The **Memo** button can be found at various locations throughout One Transport. It enables you to add a note to an entity for later reference.

- 1. Select the entity you want to record a memo for.
- 2. Click the Memo button to open the Memo dialog.

Personal infe	o Driver / assistant info C	ommunications & complai	nts	
Search for	Active people	• 🗍	DOB	B 06/ ID 9048274
	[ clear   show all   hide all ]	arch 16	(no email a	address) [actions V
Name CHUHU	DOB PostCo		Personal info   Driver / assistant info ]	
Aa Aa	and the second second	Role details	Checks Training Bases Routes	es
Az	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Role type	Select role type 🔹	[ actions 🔻
Aa a	-	Badge number		Memo +

Location of the Memo button on the People | Drivers/Passenger assistants | Role details screen

lemo		
D In Aral (Font Sze)	A · * · V	
("   B / U ⊕ x, x,   □ •   ≅ ≡	a a 🗄 🗄 💠	

Memo dialog

3. Record the memo and then click the **Save** button to close the dialog and save your changes. The **Memo** dialog uses standard word processor controls to allow for rich text formatting.

# **08** | Admin

The Admin area contains a series of menus that enable you to configure the operation of the One Transport module itself. It is split into four pages: Default values and behaviours, Transport lookups, Budget codes and Configuration.

# **Setting Default Values and Behaviours**

The **Default values and behaviours page** enables you to customise the planning and route maintenance processes. The page is spilt into four tabs:

- Assessments: Enables you to configure the qualifying distances and ages used in the assessment process and maintain an exclusion list of bases for use with the Nearest School Searches function.
- Journeys & tickets: Enables you to configure One's default ticket prefix and journey settings.
- Invoices & payments: Enables you to set One's default invoice prefix and due dates for invoices and payments.
- **People roles:** Enables you to create, edit and delete new countersignatories and surveyors.

# **Setting Default Values for Assessments**

- 1. Select the Admin area and select the Default values and behaviours page.
- 2. Ensure that the **Assessments** tab is selected. Editable fields related to the assessment process are displayed.

Default values & behaviours	Transport lookups	Budget codes	Configuration
Assessments Journeys & tickets	Invoices & payments	People roles	
✓ Age-related preferences			
Older qualifying distance	3.000	miles	(for passengers older than the transition age)
Younger qualifying distance	2.000	miles	(for passengers younger than or equal to the transition age)
Transition age	8	years	(passengers older than this use the older qualifying distance)
Lower cut-off age	4	years	(the youngest that passengers can be for entitlement)
Upper cut-off age	15	years	(the oldest that passengers can be for entitlement)
and an end of the second s			
✓ Low Income Family rules			
Transfer to secondary age	11	years	(the age at which students transfer to secondary school)
Minimum walking distance	2.000	miles	(passengers whose walking route is LESS than this are NOT entitled under LIF rules)
Maximum driving distance	6.000	miles	(passengers whose driving route is MORE than this are NOT entitled under LIF rules)
Include G&B FSM	$\checkmark$		(include grants and benefits free school meals in determination of LIF status)
✓ Bases			
In catchment check	$\checkmark$		(check whether the base is in catchment when determining entitlement)
Always exc	lude these bases from	n nearest scho	ol searches
ANTBase02			
Albany Science College			
ACS Egham International School			
ANTBase01			
16-19 Abingdon			
For the formation of the formation	1		
[ add a base to exclusion list   remove a	base from exclusion list		[ cancel ] Save

- 3. Make the required edits. The following fields are available:
  - Older qualifying distance: The journey distance at which passengers older than the transition age qualify for free transport.
  - Younger qualifying distance: The journey distance at which passengers younger than the transition age qualify for free transport.
  - Transition age: The age at which passengers switch from being assessed against the younger qualifying distance to the older qualifying distance.
  - **Lower cut-off age:** The youngest that passengers can be for entitlement.
  - Upper cut-off age: The oldest that passengers can be for entitlement.
  - Transfer to secondary age: The age at which students transfer to secondary school. Used when calculating LIF status.
  - Minimum walking distance: The cut-off for walking distance under LIF rules. Passengers whose walking distance is shorter than this are not eligible for LIF status.
  - Maximum driving distance: The cut-off for driving distance under LIF rules. Passengers whose driving distance is greater than this are not eligible for LIF status.
  - Include G&B FSM: Select this check box to include Grants and Benefits free school meals information when determining LIF status.
  - In catchment check: Select this check box to include a check on the address being in catchment when calculating entitlement.
- 4. Click the **Save** button to save your changes.

### **Editing the Nearest School Searches Exclusion List**

Schools that are added to the Nearest Schools exclusion list do not show up in search results on the **Utilities | Nearest schools** page, and are excluded from entitlement calculations conducted during assessments.

#### Selecting Base Groups to Be Used in Nearest School Search

- 1. Select the Admin area and select the Default Values and behaviours page.
- 2. Ensure that the **Assessments** tab is selected. Editable fields related to assessment settings are displayed.
- Ensure that the Base Groups for Assessment Nearest School section is open. A list of selectable base groups is displayed.

	Base Code	Description		
LK		0070 - TABLE_ID	•	
A1		al		
ACD		Academy		
ADM		Administration		
ADV		Advisory Teachers		
AEC		Community College		
AGY		Agency		
AT		Admissions	~	
CHE		College of HE		

- 4. Select the base groups that you want to include in the Nearest School search. Only those bases that belong to the selected groups are returned as search results.
- 5. Click the **Save** button to save your changes.

#### **Excluding a Base from Nearest School Searches**

- 1. Select the Admin area and select the Default values and behaviours page.
- 2. Ensure that the **Assessments** tab is selected. Editable fields related to the assessment process are displayed.

✤ Low Income Family rules			
Transfer to secondary age	11	years	(the age at which students transfer to secondary school)
Minimum walking distance	2.000	miles	(passengers whose walking route is LESS than this are NOT entitled under LIF rules)
Maximum driving distance	6.000	miles	(passengers whose driving route is MORE than this are NOT entitled under LIF rules)
Include G&B FSM	$\checkmark$		(include grants and benefits free school meals in determination of LIF status)
★ Bases			
In catchment check	$\checkmark$		(check whether the base is in catchment when determining entitlement)
Always exclude these	e bases fron	n nearest scho	pol searches
ANTBase02			
Albany Science College			
ACS Egham International School			
ANTBase01			
16-19 Abingdon			
[ add a base to exclusion list   remove a base from e:	xclusion list ]		
			[ cancel ] Save

3. Click the add a base to exclusion list hyperlink to display the Choose a base dialog.

	Choose a base									
Looking for										
LEA	All									
Туре	Туре									
Control	Please s	select								
Active	✓									
				[ cle	ear] Search					
Base Na	ame ≑	School Number	LEA	Base Typ	e					
Abbey Middle S	chool	4001	999	JUN						
Westfield Middle	e School	4033	999	MID						
Showing 1 - 2 c	of 2			< prev	next >					
[ view details ]				[cancel] Se	elect this base					

- 4. Enter search criteria and then click the **Search** button to view a list of matching bases.
- 5. Highlight a base and then click the **Select this base** button to select the base and close the dialog.
- 6. Click the **Save** button to save your changes.

#### **Including a Base in Nearest School Searches**

- 1. Select the Admin area and select the Default Values and behaviours page.
- 2. Ensure that the **Assessments** tab is selected. Editable fields related to assessment settings are displayed.
- 3. In the **Always exclude these bases from nearest school** searches menu, highlight the base you want to remove from the exclusion list.

Always exclude these bases from nearest school searches
ANTBase02
Albany Science College
ACS Egham International School
ANTBase01
16-19 Abingdon
[ add a base to exclusion list   remove a base from exclusion list ]

- 4. Click the **remove a base from exclusion list** hyperlink. The base is removed from the exclusion list.
- 5. Click the **Save** button to save your changes.

## **Setting Default Values for Journeys**

- 1. Select the Admin area and select the Default Values and behaviours page.
- 2. Select the Journeys & tickets tab. Editable fields related to journey settings are displayed.

Assessments	Journeys & tickets	Invoices & payments	People roles
✓ Ticket			
Ticket prefix			
✓ Journey			
Journey thresho	old distance		
Journey mileag	e rate		
			[ cancel ] Save

- 3. Make the required changes. The available fields are as follows:
  - **Ticket prefix:** The string of characters that appears at the start of every ticket ID.
  - Journey threshold distance: A specified maximum journey distance from starting address to alighting stop. If exceeded, One Transport will show a yellow warning triangle when the journey is created, although you can still create the journey if required.
  - **Journey mileage rate**: The default mileage rate for journeys.
- 4. Click the Save button to save your changes.

## **Configuring Default Invoice Settings**

- 1. Select the Admin area and select the Default values and behaviours page.
- Select the Invoices & payments tab. Editable fields related to invoices and payments are displayed.

[one]	Processes	People	Operations	Utilities	Admin		Welcome <b>synad</b>	in I	Help	Ľ	Change Password	I.	Logout
Default	t values & beha	viours	Transport lookups	Budge	et codes	Configuration							
Assess	ments Journe	eys & tickets	Invoices & paymo	ents Pe	ople roles								
✓ Invo	bice												
Invoic	e prefix												
No. of	invoice due days												
											[	ancel	Save

- 3. Open the **Invoice** section and enter an **Invoice prefix.** The value entered will appear as the default value in the **Processes | Single Passenger | Invoices | Serial Number** field.
- 4. Enter the default **No. of invoice due days**. This field enables you to set a default invoice due date, calculated from the issue date.
- 5. Click the **Save** button to save your changes.

## **Configuring Payment Due Dates**

- 1. Select the Admin area and select the Default Values and behaviours page.
- 2. Select the **Invoices & payments** tab. Editable fields related to invoices and payments are displayed.

Assessments Journeys & tickets Invoices & payment	People roles
> Invoice	
✓ Payment	
No. of payment due days	]
	[ cancel ] Save

- 3. Open the **Payment** section and enter a default **No. of payment due days.** This field enables you to set a default payment due date, calculated from the date the payment is entered.
- 4. Click the **Save** button to save your changes.

## **Configuring Contract Edit Period**

One Transport enables users to make changes to closed contracts for a limited time period after the contracts have been closed. The length of the period in which contracts can be changed after closure is configured as a default value in the **Admin** section.

- 1. Select the Admin area and select the Default Values and behaviours page.
- Select the Invoices & payments tab. Editable fields related to invoices and payments are displayed.

Assessments Journeys & tickets Invoices & payments People roles	
> Invoice	
> Payment	
No. of days contract should be editable after the closure	
	[ cancel ] Save

- 3. Open the **Contract** section and enter a default **No. of days contract should be editable after closure**.
- 4. Click the **Save** button to save your changes.

## **Managing Countersignatories**

#### **Creating a Countersignatory**

- 1. Select the Admin area and select the Default Values and behaviours page.
- 2. Select the **People roles** tab and open the **Countersignatories for driver/assistant checks** section. A list of all current countersignatories is displayed.
- 3. Click the **create a new countersignatory** hyperlink. Editable fields related to countersignatory details are displayed.

Assessments	Journeys & tickets Invoices & payments signatories for driver/assistant checks	People roles	
	Name 🗢	Reference number	
A B			^
C C		10	~
[ create a ne	ew countersignatory   delete selected countersignatory ]		

#### Admin

- 4. Select the person that you want to add as a countersignatory:
  - a. Click the **Name** browse to display the **Select a person** dialog.

Search for				1000
Search for	Active people i	n this authority		•
Name	Any name cha	aracters		
Person Id				
Postcode		Туре	Any	•
Base	Select a base			Q.X
Gender	Either			•
UPN				
Date of birth	dd/mm/yyyy			
NCY	All			•
	1	Use contains m	atching for n	ames 🗌
		[ clear   sho	w all   hide a	[] Search
1	Name	DOB	Pos	tCode
No records to	view		< prev	next >

- b. Enter search criteria and then click the Search button to display a list of matching people.
- c. Highlight a person and then click the **Select** button to select that person and close the dialog.
- 5. If required, enter a Reference Number for the countersignatory.
- 6. Click the Save button.

#### **Deleting a Countersignatory**

- 1. Select the Admin area and select the Default values and behaviours page.
- 2. Select the **People roles** tab and open the **Countersignatories for driver/assistant checks** section. A list of all current countersignatories is displayed.
- 3. Highlight the person you want to delete as a countersignatory.

ssessments	Journeys & tickets Invoices & payn	nents People roles	
✓ Countersign	atories for driver/assistant che	ecks	
	Name 💠	Reference number	
A			~
E			
c		100	
c .			
[ create a new cou	untersignatory   delete selected countersig	gnatory ]	

- 4. Click the **delete selected countersignatory** hyperlink. A confirmation dialog is displayed.
- 5. Click the **Delete** button to delete the countersignatory.

### **Managing Surveyors**

The Admin | Default values and behaviours | People roles tab enables you to name people in the One Transport database as surveyors. People who have been named as surveyors can be recorded as having performed route surveys and vehicle checks.

#### **Creating a Surveyor**

- 1. Select the Admin area and select the Default values and behaviours page.
- 2. Select the **People roles** tab and open the **Surveyors** section. A list of all surveyors is displayed.

3. Click the create new surveyor hyperlink to display editable fields relating to surveyor details.

Assessm	ents Journeys & tickets Invoices &	payments Peop	le roles	
> Cour	ntersignatories for driver/assistant	checks		
v Surve	eyors			
	Name 🕇			
Ju‴ Ki				^
м				~
[ create	e new surveyor delete selected surveyor			
Name	Select a person	Q.X.*		
			[ cancel ] Save	

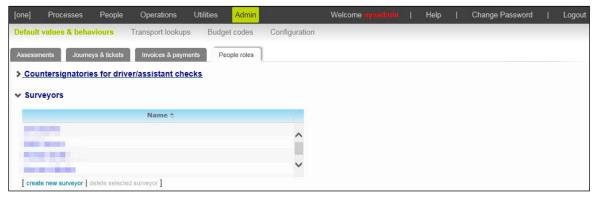
- 4. Select the person that you want to add as a surveyor:
  - a. Click the Name browse to display the Select a person dialog.

	Sele	ect a person	
Search for	Active peop	ole in this authority	•
Name	Any name	characters	
Person Id			
Postcode		Туре А	ny 🝷
Base	Select a ba	850	0.8
Gender	Either		-
UPN			
Date of birth	dd/mm/yyy	γ.	
NCY	All		•
		Use contains match	ning for names
		[clear   show a	I hide all J Search
-	Name	DOB	PostCode
No records to	view		o prev   next >
			[cancel] Select

- b. Enter search criteria and then click the **Search** button to display a list of matching people.
- c. Highlight a person and then click the **Select** button to select that person and close the dialog.
- 5. Click the Save button.

#### **Deleting a Surveyor**

- 1. Select the Admin area and select the Default values and behaviours page.
- 2. Select the **People roles** tab and open the **Surveyors** section. A list of all current surveyors is displayed.
- 3. Highlight the person you want to delete as a surveyor and click the **delete selected surveyor** hyperlink. A confirmation dialog is displayed.



4. Click the **Delete** button to delete the surveyor.

## **Managing Transport Lookups**

The **Transport lookups** page enables you to create, edit and delete vehicle types, invoice reasons and special need types for use elsewhere in One Transport.

## **Configuring Vehicle Types**

The Admin | Transport lookups | Vehicles tab enables you to create and edit vehicle types for use on the Operations | Contractors | Vehicles tab.

#### **Creating a Vehicle Type**

- 1. Select the Admin area and select the Transport lookups page.
- 2. Select the Vehicles tab. A list of One Transport's current vehicle types is displayed.

[one]	Processes	People	Operations	Utilities	Admin		Welcome		Help	Change Password	Logout
Default v	alues & behavio	urs Ti	ansport lookups	Budget	t codes	Configuration					
Vehicles	Invoices	Special tra	nsport needs								
These type	es of vehicle are cur	rently config	ured:								
Code 💠		Descr	iption								
CHA1		Chario	t								~
CO45		Coach	(45 seater)								
CO53		Coach									
C055		Coach	(55 seater)								
DB95		Double	e decker 96 seater								
DD72		Double	e Decker (72 seate	r)							
DD75		Double	e Decker (75 seate	r)							
DD80		Double	e Decker (80 seate	r)							
DON1		Donke	у								~
HEL1		Helico	pter								~
[ create a	new type of vehicle	delete s	selected type of vehic	ie ]							

3. Click the **create a new type of vehicle** hyperlink. Editable fields relating to vehicle type details are displayed.

[one]	Processes	People	Operations	Utilities Adm	in	Welcome s	ysadmin	1	Help	Т	Change Password	Т	Logout
Default	values & beha	viours T	ransport lookups	Budget codes	Configuration								
Vehicles	Invoices	Special tr	ansport needs										
		opeonal a											
These typ	es of vehicle are	currently confi	gured:										
Code 💠		Desc	ription										
CHA1		Chari	ot										
CO45		Coac	n (45 seater)										
C053		Coact	n										
C055		Coach	n (55 seater)										
DB95		Doub	le decker 96 seater										
DD72		Doub	le Decker (72 seate	r)									
DD75		Doub	le Decker (75 seate	r)									
DD80		Doub	le Decker (80 seate	r)									
DON1		Donk	ey										
HEL1		Helico	opter										~
( create a	a new type of veh	nicle   delete	selected type of vehic	le]									
Code			*										
				<b>_</b>									
Descriptio	m			*									
Capacities	s	(seated)	*	(standing) *	(wheelch	airs)	(max	with m	ax wheeld	hairs)			
											1	cancel	Save

- 4. Enter a **Code** for the vehicle type. This is a unique identifier for the new class of vehicle.
- 5. Enter a **Description** of the vehicle type.
- 6. Enter the **seated** and **standing capacities** of the vehicles in the type.
- 7. If applicable, enter the number of wheelchairs that vehicles in the type can carry.
- 8. If applicable, enter the vehicle's total capacity when it has the maximum number of wheelchairs on board into the **max with max wheelchairs** field.
- 9. Click the **Save** button to save the new vehicle type.

#### **Deleting a Vehicle Type**

- 1. Select the Admin area and select the Default values and behaviours page.
- 2. Select the Vehicles tab. A list of One's current vehicle types is displayed
- 3. Highlight the vehicle type you want to delete and click the **delete selected type of vehicle** hyperlink. A confirmation dialog is displayed.

[one]	Processes	People	Operations	Utilities Admin		Welcome sysadi	nin	Help	Change Password	Logout
Default v	alues & behavi	ours Ti	ransport lookups	Budget codes	Configuration					
Vehicles	Invoices	Special tra	insport needs							
These type	es of vehicle are c	urrently config	jured:							
Code 🔶		Descr	iption							
CHA1		Charic	t							
CO45		Coach	(45 seater)							
CO53		Coach								
CO55		Coach	(55 seater)							
DB95		Double	e decker 96 seater							
DD72		Double	e Decker (72 seater	)						
DD75		Double	e Decker (75 seater	)						
DD80		Double	e Decker (80 seater	)						
DON1		Donke	зy							
HEL1		Helico	pter							•
[ create a	new type of vehic	le   delete :	selected type of vehicle	9]						
Code	DON1		*							
Description	n Donkey			*						
Capacities	1	(seated)	ŧ 1	(standing) 🕷	(wheelchair	s)	(max with m	ax wheelchairs	s)	
										[cancel] Save

4. Click the **Delete** button to delete the vehicle type and close the dialog.

## **Configuring Invoice Reasons**

The Admin | Transport lookups | Invoices tab enables you to create and edit invoice reasons for use on the Processes | Single Passenger | Invoices and Processes | Multiple Passengers | Invoice Passengers tabs.

#### **Creating an Invoice Reason**

- 1. Select the Admin area and select the Default values and behaviours page.
- 2. Select the **Invoices** tab. A list of One Transport's current invoice reasons is displayed.

[one]	Processes	People	Operations	Utilities	Admin			Welcome		Help	Change Password	Logout
Default va	alues & behavi	ours T	ransport lookups	Budget	codes	Configura	ation					
Vehicles	Invoices	Special tra	ansport needs									
These reas	ons for issuing an	n invoice are	currently configured:									
Reason (	(item) 🔶						Default	amount (	if any)			
Damage												
Invoice fo	or 1995/1996											
Invoice fo	or 1996/1997											
Invoice fo	or 1997/1998											
Invoice fo	or 1998/1999											
Invoice fo	or 2000/2001											
Invoice fo	or 2001/2002											
[ amata a	nau invoice con	ne Latatata au	elected invoice reason	1								

 Click the create a new invoice reason hyperlink. Editable fields related to invoice reasons are displayed.

[one]	Processes	People	Operations	Utilities	Admin		Welcome	sysadmin	I	Help	I	Change Password	I	Logout
Default va	alues & behavi	iours T	ransport lookups	Budget	codes Co	onfiguration								
Vehicles	Invoices	Special tra	insport needs											
These reas	ons for issuing a	n invoice are	currently configured:											
Reason (	item) 🔶					Defau	lt amount (i	f any)						
Damage														
Invoice fo	or 1995/1996													
Invoice fo	r 1996/1997													
Invoice fo	r 1997/1998													
Invoice fo	r 1998/1999													
Invoice fo	r 2000/2001													
Invoice fo	r 2001/2002													
create a	new invoice reas	on delete se	elected invoice reason	1										
Reason for	invoice					*								
Default amo	ount			(pounds)										
												[	cancel ]	Save

- 4. Enter the Reason for invoice.
- If required, enter a **Default amount** (in pounds). All invoices issued for the newly-created reason will be for this amount unless otherwise specified. For more information on creating and setting the value of invoices, see <u>Invoicing a Passenger</u> on page 25.
- 6. Click the Save button to save the new invoice reason.

#### **Deleting an Invoice Reason**

- 1. Select the Admin area and select the Default values and behaviours page.
- 2. Select the **Invoices** tab. A list of One Transport's current invoice reasons is displayed.
- 3. Highlight the reason you want to delete and then click the **delete selected invoice reason** hyperlink. A confirmation dialog is displayed.

[one]	Processes	People	Operations	Utilities	Admin			Welcome		Help	Change Password		Logout
Default	values & behavi	iours	Transport lookups	Budge	t codes	Configur	ration						
Vehicles	Invoices	Special t	transport needs										
These rea	isons for issuing a	n invoice are	e currently configured:										
Reason	(item) 💠						Defaul	t amount (if	any)				
Damage													
Invoice	for 1995/1996												
Invoice	for 1996/1997												
Invoice	for 1997/1998												
Invoice	for 1998/1999												
Invoice	for 2000/2001												
Invoice	for 2001/2002												
[ create	a new invoice reas	on   delete	selected invoice reason	1									
		_											
Reason fo	or invoice	Da	mage			×	*						
Default ar	nount			pounds)									
												cancel ]	Save

4. Click the **Delete** button to delete the reason and close the dialog.

## **Configuring Special Need Types**

The Admin | Transport lookups | Special transport needs tab enables you to create and edit special need types for use on the People | Personal info | Special needs tab.

#### **Creating a Special Need Type**

- 1. Select the Admin area and select the Transport lookups page.
- 2. Select the **Special transport needs** tab. A list of all current special need types is displayed.

Vehicles	Invoices Special transport needs
These type	es of special transport need are currently configured :
Code	Description
ESCO	Escort
HARN	Harness
MTA	Must Travel Alone
ото	One to One Escort
SEAT	Special Seat
WHEE	Wheelchair
[ create a	new type of need   delete selected type of need ]

3. Click the **create a new type of need** hyperlink. Editable fields related to need details are displayed.

[ <u>create a new t</u>	ype of need   delete selected type of need ]
Code	*
Description	
	[cancel] Save

- 4. Enter a **Code** for the need.
- 5. Enter a **Description** for the need.
- 6. Click the **Save** button to create the new need type.

#### **Deleting a Special Need Type**

- 1. Select the Admin area and select the Transport lookups page.
- 2. Select the **Special transport needs** tab. A list of all current special need categories is displayed.
- 3. Highlight the need you want to delete and click the **delete selected type of need** hyperlink. A warning dialog is displayed.

Vehicles	Invoices	Special transport needs		
These type	es of special transp	port need are currently config	ured :	
Code	Description			
ESCO	Escort			
HARN	Harness			
MTA	Must Travel Al	one		
ото	One to One Es	cort		
SEAT	Special Seat			
WHEE	Wheelchair			
Famala au	new type of need 1	delete selected type of need	1	
L create a l	new type of need [	delete selected type of need	1	
Code	MTA	*		
Description	n Must Tra	vel Alone		*
			[cancel] Save	

4. Click the **Delete** button to delete the need.

**NOTE:** You cannot delete a need type that is currently assigned to one or more passengers. For more information on removing needs from passenger records, see <u>Managing Special Needs</u> on page 56.

## **Configuring Budget Codes**

The Admin | Budget codes page enables you to create budget codes for use in the Operations | Contracts | Costs | Budget codes section.

## **Creating a Budget Code**

- 1. Select the Admin area and select the Budget codes page.
- Click the create a new budget code hyperlink. Editable fields relating to budget code details are displayed.

[create a new	budget code ]			
Budget code	Free text budget co			
Description	Free text description	*		
Cost code	Free text description			

- 3. Enter a Budget code.
- 4. Enter a Description.
- 5. If required, enter a **Cost code**.
- 6. Click the Save button to save the code.

## Configuration

The **Configuration** page enables you to edit One Transport's database, server, GIS, upload and authentication settings.

**IMPORTANT NOTE:** One Transport's database, server and authentication settings are configured by Capita when One Transport is first installed. Do not change these settings unless your environment changes.

### **Configuring the Database**

- 1. Select the Admin area and select the Configuration tab.
- 2. Open the **Database Configuration** section. Editable fields related to the database are displayed.

[one]	Processes	People	Operations	Utilities	Admin		Welcome		Help	Change Password	Logout
Default	values & behavi	ours	Transport lookups	Budget	codes	Configuration					
Site	Configuratio	n									~
♥ Data	abase Configu	ration									
Serve	ri I		OM362	AAA							
User i	d		onemx6	64							
Passw	vord		Enter P	assword (Le	eave empty	to retain existing passw	ord)				
Confin	m Password		Confirm	Password				Tes			

- 3. Enter the name of the database Server.
- 4. Enter your **User id** for the database.

- 5. Enter your **Password** and then re-enter it into the **Confirm Password** box.
- 6. If required, click the **Test** button to test the credentials you just entered. A dialog is displayed indicating whether or not the connection was successfully established.
- 7. Click the **Save** button to save your changes. A confirmation dialog is displayed, indicating that the AppPool containing the One transport site will be restarted if you continue.

**IMPORTANT NOTE:** Restarting the AppPool logs all users out of One Transport. Ensure that all important data is saved before proceeding.

8. Click the Yes button to save your changes and restart the Transport AppPool.

## **Configuring Authentication**

- 1. Select the Admin area and select the Configuration tab.
- 2. Open the Authentication section. Editable fields related to authentication are displayed.

[one]	Processes	People	Operations	Utilities	Admin		Welcome www	adroin	Help	Change Password	1	Logo
Default	values & behav	iours	Transport lookups	Budget o	odes	Configuration						
Site	Configuratio	on										
> Data	abase Configu	iration										
✓ Aut	hentication											
Open	ID provider		https://	ONE-VM2012	APP/CCS	OpenIDProvider_3624	AAVuser	Test				

- 3. Enter the URL of your OpenID Provider in the Open ID provider box.
- 4. If required, click the **Test** button to test the credentials you just entered. A dialog is displayed indicating whether or not the connection was successfully established.
- 5. Click the **Save** button to save your changes. A confirmation dialog is displayed, indicating that the AppPool containing the One transport site will be restarted if you continue.

**IMPORTANT NOTE:** Restarting the AppPool logs all users out of One Transport. Ensure that all important data is saved before proceeding.

6. Click the Yes button to save your changes and restart the Transport AppPool.

## Specifying the One v4 Server

- 1. Select the **Admin** area and select the **Configuration** tab.
- 2. Open the Capita One V4 section. Editable fields related to the V4 server are displayed.

[one]	Processes	People	Operations	Utilities	Admin	Welcon	ne sysadmin		Help	Change Password	Logout
Default	values & behav	iours	Transport lookups	Budget co	odes	Configuration					
Site	Configuratio	on									^
> Data	abase Configu	iration									
> Aut	hentication										
🕶 Cap	ita One V4										
Applic	ation server		https://0	ONE-VM2012/	APP/CCS	SApplicationserver_362AAA	Tes	t			
Sessio	on server		https://d	ONE-VM2012/	APP/CCS	SSessionServer_362AAA	Tes	t			
Online	eserver		https://0	ONE-VM2012	NEB/CC	SOnline_362AAA/default.aspx	Tes	t			
Repor	t server		https://d	ONE-VM2012F	RPT/ccsr	reportserver_362AAA	Tes	t			

3. Enter a link to your application server in the **Application server** field.

- 4. Enter a link to your session server in the **Session server** field.
- 5. Enter a link to your online server in the **Online server** field.
- 6. Enter a link to your report server in the **Report server** field.
- 7. If required, use the **Test** buttons to test the credentials you just entered. A dialog is displayed indicating whether or not the connection was successfully established. All server configuration fields all have their own **Test** buttons.
- 8. Click the **Save** button to save your changes. A confirmation dialog is displayed, indicating that the AppPool containing the One transport site will be restarted if you continue.

**IMPORTANT NOTE:** Restarting the AppPool logs all users out of One Transport. Ensure that all important data is saved before proceeding.

9. Click the **Yes** button to save your changes and restart the Transport AppPool.

## **Configuring GIS**

**NOTES:** This section covers the GIS configuration options present within the One Transport application itself. Additional configuration must be performed via the CCS Configuration Utility in order for you to use GIS with One Transport.

For more information on configuring GIS for One Transport, see the Deploying and Configuring Transport v4 for Local Authorities and Deploying v4 GIS Services technical guides, available from www.onepublications.com and My Account.

For more information on the structure of Transport catchment GML files, see the Importing GIS Catchment Files topic of the A&T v4 Autumn 2014 Release (3.55) product notes, available from www.onepublications.com and My Account.

- 1. Select the Admin area and select the Configuration tab.
- 2. Open the **GIS Configuration** section. Editable fields related to GIS are displayed.

file Width	256	
Tite Height	256	
ile Server Link Pattern	http://cssbedora4:8080/tilecachewsgi/	Test
Box Bottom LeftX	400000	
Bax Battom LeftY	150000	
Bax Top RightX	600000	
Box Top Right?	350000	
lie Protocol Type	TMS	
efault Zoom	4	
inimum Zoom	1	
taximum Zoom	20	
top Parameters	Enter Map Parameter	
ayer Parameters	Enter Layer Parameter	
M/S Layer Options	Enter WMS Layer Options	
MS Route Service	http://10.128.39.48/ccsgisapi/routing.asmx	Test
Indnance Survey Licence Key	Enter Ordnance Survey Licence Key	

3. Complete the Tile Width, Tile Height, Tile Server Link Pattern, BBox Bottom LeftX, BBox Bottom LeftY, BBox Top RightX, BBox Top RightY, Tile Protocol Type, Default Zoom, Minimum Zoom and Maximum Zoom fields.

These fields are common to both the One Transport and A&T implementations of GIS. For more information, see the *Configuring the Application Server* section of the *Deployment of V4 GIS Services* technical guide, available from <u>www.onepublications.com</u> and My Account.

4. Enter a JSON formatted string into the Map Parameters field.

Example: {maxScale: 10}

The **Map Parameters** field is exclusive to One Transport, and enables you to further parameterize the creation of the OpenLayers map. For a list of the parameters that can be defined in this field, see <u>http://dev.openlayers.org/releases/OpenLayers-</u>2.13.1/doc/apidocs/files/OpenLayers/Map-js.html.

Unless otherwise specified, One uses the following parameters as defaults:

- projection EPSG:27700
- displayProjection EPSG:4326
- MaxExtent [taken from BBox XY values]
- 5. Enter a JSON formatted string into the Layer Parameters field.

The **Layer Parameters** field is exclusive to One Transport, and enables you to further parameterize the creation of the OpenLayers layer. The available JSON parameters in this field are dependent on the **Tile Protocol Type** you selected in step 3:

TMS or WMS-C - The parameters that can be set are defined at <u>http://dev.openlayers.org/releases/OpenLayers-</u> 2.13.1/doc/apidocs/files/OpenLayers/Layer/TMS-js.html.

Example: { layername: "theNameOfYourLayer" }

Unless otherwise specified, One uses the following parameters as defaults:

- layername bedsmap
- type png
- WMS The parameters that can be set are defined at <u>http://dev.openlayers.org/releases/OpenLayers-</u> 2.13.1/doc/apidocs/files/OpenLayers/Layer/WMS-js.html

```
Example: { layername: "theNameOfYourLayer", layers: "the comma separated
layers to be displayed" }
```

Unless otherwise specified, One uses the following parameters as defaults:

- format image/png
- layername OneMapCached
- layers 250k,streetview,build,roads
- request GetMap
- service WMS
- version 1.1.1
- WMTS The parameters that can be set are defined at <u>http://dev.openlayers.org/releases/OpenLayers-</u> 2.13.1/doc/apidocs/files/OpenLayers/Layer/WMTS-js.html

Example: { layer: "theNameOfYourLayer" }

Unless otherwise specified, One uses the following parameters as defaults:

- format image/png
- layer OneMapCached
- matrixlds EPSG:27700:0, EPSG:27700:1,....,EPSG:27700:25

- matrixSet EPSG:27700
- name WMTSMap
- opacity 10
- tilecol 1
- tilerow 4
- tilematrix EPSG:27700
- If you selected WMS from the Tile Protocol Type field, enter a JSON formatted string into the WMS Layer Options field.

Example: { noMagic: true }

The **WMS Layer Options** field is exclusive to One Transport, and enables you to further parameterize the creation of the OpenLayers WMS layer. For a list of the parameters that can be defined in this field, see <a href="http://dev.openlayers.org/releases/OpenLayers-2.13.1/doc/apidocs/files/OpenLayers/Layer/WMS-js.html">http://dev.openlayers.org/releases/OpenLayers-2.13.1/doc/apidocs/files/OpenLayers/Layer/WMS-js.html</a>.

7. Enter the URL of the GIS API service into the HMS Route Service field.

**IMPORTANT NOTES:** You must also enter the GIS API Service URL into the **GIS API Service URL** fields of the CCS Configuration Utility. These fields are found on both the **Transport v4** and **Integration Service** tabs. The URL must be entered into both fields separately.

From 3.58 onwards, the GIS API Service URL must be set to https://[server name]/ccsgisapi/Routing2.asmx

For more information on configuring GIS for One Transport, see the Deploying and Configuring Transport v4 for Local Authorities and Deploying v4 GIS Services technical guides, available from <u>www.onepublications.com</u> and My Account.

8. Enter an Ordnance Survey Licence Key.

This value is used when a map image is printed and is displayed underneath the map. It should be set to the same value as the **GIS OS Licence** value of the **Application Server** setting.

9. Click the **Save** button to save your changes. A confirmation dialog is displayed, indicating that the AppPool containing the One transport site will be restarted if you continue.

**IMPORTANT NOTE:** Restarting the AppPool logs all users out of One Transport. Ensure that all important data is saved before proceeding.

10. Click the **Yes** button to save your changes and restart the Transport AppPool.

## **Setting Distance Calculation Parameters**

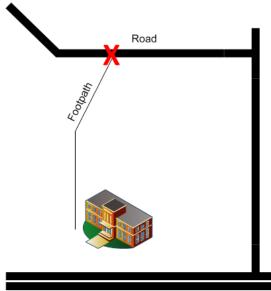
The distance calculation parameters can be used to configure how One behaves when calculating distances in certain scenarios. These parameters are configured in v4 Online via **Administration | System Administration | System admin | System defaults**, rather than through One Transport itself.

#### Addresses Closer to a Footpath than a Road

If a particular address is closer to a footpath than a road, then the nearest road may not necessarily be a valid starting point for a driving distance calculation. The **TUSENEARST** parameter governs the way in which One calculates distances in this scenario.

#### **Example:**

Suppose that a school is located next to a dual carriageway and connected to a minor road via a footpath, as shown in the following diagram:



Dual Carriageway

In this example, the closest road is a dual carriageway. A point on this road would not be a valid starting point for a driving distance calculation.

If the TUSENEARST parameter is selected, then One uses the walking network to find the closest drivable link to the address and calculates a driving distance from that point (marked with an X on the diagram).

Using the **TUSENEARST** parameter eliminates the need for transport officers to calculate distances manually, but assumes that the start point used is an appropriate point from which to calculate a driving distance (i.e. that it is not in a no-stopping area, for example).

**NOTE:** The walking distance from the address to the driving network is not included in the calculated driving distance, even if the **Include Off Road Distance in Driving Distance Calculation** check box is selected.

One works differently when calculating driving distances to properties whose nearest link is drivable, as these properties do not use the walking network for their start point. As such, the straight line from the network to the property is included in these circumstances, as long as the **Include Off Road Distance in Driving Distance Calculation** check box is selected.

If the TUSENEARST parameter is not selected, then One raises an error if you attempt to calculate a driving distance. Walking and direct distances are still calculated in this scenario.

This means that a transport officer must use GIS to manually calculate a driving distance to a valid point, but ensures that One does not calculate a distance to an inappropriate starting point.

**IMPORTANT NOTE:** The **TUSENEARST** parameter is used at your LA's own risk.

#### **Off Road Distances**

The off road distance is the straight line distance from the coordinates of the address to the network. One uses two parameters to determine whether this distance is included in the calculation of walking and driving distances:

- ORDDRIVING controls whether the off road distance is included in the driving distance calculation.
- ORDWALKING controls whether the off road distance is included in the walking distance calculation.

For both of these parameters, a value of **T** means that the distance is included in the calculation, and a value of **F** means that is not.

*IMPORTANT NOTE:* The *ORDDRIVING* and *ORDWALKING* parameters are shared between One Admissions and One Transport. Their settings affect distance calculations in both modules.

#### **Default Parameters**

The following parameters enable you to configure One's default behaviour when running the Nearest School search or calculating distances for an assessment:

- TASSNOHS: the number of schools to be assessed when performing a nearest school search. A higher value provides more confidence that the schools returned are accurate (i.e. all possible schools are considered and ranked), but the cost is decreased performance. A lower value will increase performance but risks not properly identifying the actual nearest school.
- TASSNTHSCH: the default number of schools returned by the Nearest School search. The default value is 5.

**IMPORTANT NOTE:** Setting the **TASSNTHSCH** parameter to a value greater than 10 may have a negative impact on search performance.

 NO\_OF\_NESC: the default number of schools returned by the Nearest School check that is automatically performed when you run an assessment. The default value is 5.

**IMPORTANT NOTE:** Setting the **NO\_OF\_NESC** parameter to a value greater than 10 may have a negative impact on search performance.

- DEST\_CRIT: the part of the destination base that distances are calculated to, by default, when performing an assessment. Select any of the following values:
  - -1: Nearest site
  - -2: Nearest gate
  - -3: Nearest gate or site
  - -4: Nearest gate, if no gate for a site then nearest site
  - -5: Principal site
  - -6: Main gate.

The default value is -1.

- ALTER\_CRIT: the part of any alternative bases that distances are calculated to, by default, when performing an assessment. Select any of the following values:
  - -1: Nearest site
  - -2: Nearest gate
  - -3: Nearest gate or site
  - -4: Nearest gate, if no gate for a site then nearest site
  - -5: Principal site
  - -6: Main gate.

The default value is -1.

- CAL\_METHOD: the default distance calculation method used. Select any of the following values:
  - Direct

- Driving
- Walking.

The default value is **Direct**.

- NE\_SC\_CRIT: the part of the destination base that distances are calculated to, by default, when running the Nearest School search. Select any of the following values:
  - 1: Nearest site
  - 2: Nearest gate
  - 3: Nearest gate or site
  - 4: Nearest gate, if no gate for a site then nearest site
  - 5: Principal site
  - 6: Main gate.

The default value is **1**.

#### **Setting Parameters**

1. In the v4 Online home screen, select the **Administration** lozenge to display the **Administration** module.

One Home System Admin Address Managem	Ine Home System Admin Address Management Welcome \$15ADMIN   Enter   Legent										
SGL Mail Merge Performance Diagnostics Syst	em Administration.										
	and No Query Selected	🗙 Clotete 🦯 Edit 💭 Wide Mew									
Doery Name	P Context:	Active: NotSet									
Select Context	SQL Users User Groups										
🕂 Add New Query											
Query Name Context											
-											

2. Click the System Administration hyperlink to display the System Administration page.

[ore] Bysta	admin Data management Address management	Welcome SYSADVIN	Help   My Account   Logout
CAPITA	CONS.		
	Welcome to the Car	oita ONE System Module	
	Citck on the manufacture of	bove to learn about its features.	
	Hover over a menu item and click o	on a sub-menu to get going straight away	
	Cocyrum # 2015 Create	Al rights asserved, workhuide,	
		1358.0.57966	

3. Select the System admin | System defaults hyperlink to display the System defaults page.

[sed]	vite atris		Welcom SYSADMW   Help   M	
Personnel	control System	n defaults CA defaults Online login security pursue	eters Permitted witholism Web address salidators Ethe	ic todes (Statientia
Syst	em def	aults		
Filter				
Parameter	code	Description	Parameter value	
ACT_FILT	ER	From day activities	7	0
ADDR_DA	TA.	Edit value-added address data?	r	
ADDR NA	AND	Addressee Name value	5	~
To equit	nr	Issould Street Description? T.IF	τ	
Code	ACT_FILTER			
Description	From day ec	tivities.		
Value	7			
				Cancel Seve

- 4. Select the parameter that you want to edit from the list of parameters. Editable fields relating to that parameter are displayed.
- 5. Click the **x** in the **Value** field to clear the existing parameter setting, and then enter either "**T**" (if you want to turn the parameter on), or "**F**" (if you want to turn the parameter off) into that field.

6. Click the **Save** button to save your changes. A confirmation dialog is displayed, indicating that the AppPool containing the One transport site will be restarted if you continue.

**IMPORTANT NOTE:** Restarting the AppPool logs all users out of One Transport. Ensure that all important data is saved before proceeding.

7. Click the Yes button to save your changes and restart the Transport AppPool.

## Configuring the Maximum Upload File Size

- 1. Select the Admin area and select the Configuration tab.
- 2. Open the Upload Configuration section to display the Maximum File Size field.

[one]	Processes	People	Operations	Utilities	Admin		Welcome <b>syna</b>	dinda	Help	- E	Change Password	E	Logou
Default	values & behavi	ours	Fransport lookups	Budget	codes	Configuration							
Site	Configuratio	'n											
> Data	abase Configu	ration											
> Aut	hentication												
> Cap	ita One V4												
> GIS	Configuration												
>Uplo	ad Configurat	ion											
Maxim	num file size can be	uploaded (i	n KB) 51200										

- 3. Enter a size limit (in kB) for files uploaded to Transport.
- 4. Click the **Save** button to save your changes. A confirmation dialog is displayed, indicating that the AppPool containing the One transport site will be restarted if you continue.

**IMPORTANT NOTE:** Restarting the AppPool logs all users out of One Transport. Ensure that all important data is saved before proceeding.

5. Click the Yes button to save your changes and restart the Transport AppPool.

## **Configuring SSRS Server**

- 1. Select the Admin area and select the Configuration tab.
- 2. Open the SSRS Configuration section to display the SSRS Server field.

[one]	Processes	People	Operations	Utilities	Admin		Welcome <b>eysadmin</b>		Help	Change Password	Logout
Default	values & behavi	ours Tr	ransport lookups	Budget	codes	Configuration					
Site	Configuratio	n									
> Data	base Configu	ration									
> Auth	nentication										
> Cap	ita One V4										
> GIS	Configuration										
>Uplo	ad Configurati	ion									
Maxim	um file size can be	uploaded (in	КВ) 51200								
<b>↓</b> SSR	S Configuratio	n									
SSRS	Server		https://	ONE-VM20	12RPT/Re	portServer		Test			

- 3. Enter the link to your SSRS server into the SSRS Server field.
- 4. If required, use the **Test** button to test the credentials you just entered. A dialog is displayed indicating whether or not the connection was successfully established.
- 5. Click the **Save** button to save your changes. A confirmation dialog is displayed, indicating that the AppPool containing the One transport site will be restarted if you continue.

**IMPORTANT NOTE:** Restarting the AppPool logs all users out of One Transport. Ensure that all important data is saved before proceeding.

6. Click the Yes button to save your changes and restart the Transport AppPool.

### **Enabling Performance Monitoring**

The MiniProfiler is a performance monitoring tool that appears in the bottom corner of One Transport. It displays the amount of time the server took to respond to each user instruction. You can expand response times to get a detailed breakdown, and export entries to a webpage that can be shared with One Application Support, if required.

To enable the MiniProfiler:

- 1. Select the Admin area and select the Configuration tab.
- 2. Open the **Performance Monitor Configuration** section to display the **Enable MiniProfiler** check box.

[one]	Processes	People	Operations	Utilities	Admin		Welcome	ay sadmin	Help	E	Change Password	Į.	Logout
Default	values & behavio	ours Tr	ansport lookups	Budget co	odes	Configuration							
Site	Configuration	n											
> Dat	abase Configur	ation											
> Aut	hentication												
> Cap	ita One V4												
> GIS	Configuration												
>Uplo	ad Configurati	on											
Maxin	num file size can be	uploaded (in	KB) 51200										
> <u>SSR</u>	S Configuration	n											
<b>∀</b> Perf	ormance Monit	or Config	uration										
Enabl	e MiniProfiler												
										[]	Reset ] Save		

- 3. Select the **Enable MiniProfiler** check box.
- 4. Click the **Save** button to save your changes. A confirmation dialog is displayed, indicating that the AppPool containing the One transport site will be restarted if you continue.

**IMPORTANT NOTE:** Restarting the AppPool logs all users out of One Transport. Ensure that all important data is saved before proceeding.

5. Click the **Yes** button to save your changes and restart the Transport AppPool.

#### **Using the MiniProfiler**

Once the application pool has reset, the MiniProfiler is displayed in the bottom corner of the screen.

42 Elmsmere Road, Manchester,	Address			
Abbey Middle School	Wayside	End date	dd/mm/yyyy	
Abbey Middle School (West)	Base			[concel] Save
Abbey Mile School	Dase			
Aberdo Preparatory School	Base			
Abra: Academy	Base			
Actington Academy	Base			
crington Woodnook Primary School	Base			
Address Stop-1	Address			
Alameda Middle School: 1	Wayside			
Albert Dafoe (Home Address)	Address			
Anton Junior School	Base			
Ashok2 Test (Home Address)	Address			
Bedford College of Higher Educ	Base			
Bedford Day Care Centre	Base			
Biddenham Upper School	Base			
Biddenham Upper School	Base			
Biggleswade Youth Centre	Base			
Bill Bloggs	Address			
Billys house	Address			
Showing 1 - 100 of 191	= prov   next >			
[create new stop   delete stop   export ]				

Click an entry to view a breakdown of task times for that job.

-		_
	StopHome/GetStopSummaryDetails	
	ONE-VM2012APP on Wed, 15 Mar 2017 15:	:36:17 GMT
		duration
	https://one-vm2012app:443/CCSTransport_362A	41.6
	Controller: Stop.StopHomeController.GetStopS	63.3
	Render partial: ~/Areas/Stop/Views/StopHome/	154.7
	Render: Index	4.6
212.8 ms	Render partial: EntityHistoryNavigation	18.0
	Render partial: LinkedDocumentPopUp	10.1
374.3 ms	Render partial: SqlMailMergeLink	3.3
377.7 ms		
300.8 ms	share more columns	show trivial
1411.3 ms	Billys house	Address
162.8 ms	Showing 1 - 100 of 191 < p	rev   next >
257.9 ms	[ create new stop   delete stop   export ]	
351.9 ms		

The detail dialog displays the following options:

- share exports the contents of the dialog to a webpage, the address of which can be shared with other parties (such as One Application Support) if needed.
- **more columns** displays a more detailed summary of the server's response times.
- show trivial displays those tasks that took 2ms or less to complete. Ordinarily, these tasks are not displayed in the summary.

## **Managing Route Networks**

The Route network configuration page enables you to create, edit and delete networks for use elsewhere in One Transport.

## **Configuring Networks**

The Admin | Route network configuration tab enables you to create and edit networks for use in several areas, including Process | Single Passenger | Assessment and Utilities | Nearest schools.

#### Admin

Default values	s & behaviours	Transport lookups	Budget codes	Configuration	Route network configuration		
	vorks are currently co	10 <b>-</b> 11000					
Network Ind	lex	Name			Description	Line Colour	
0	Direct		Dire	ct Route			
1	Driving		Driv	ing Route			_
2	Walking		Wal	king Route		-	
3	Safe Walking		Safe	Walking Route			_

#### **Creating a Network**

- 1. Create a network layer in line with instructions contained within GIS handbooks.
- 2. Configure rwnetserver.ini to ensure the network is accessible and has a unique Network Index number.
- 3. From the Admin | Route network configuration tab, select create new route network.
- 4. Provide the unique **Network Index** number.
- 5. Give network a **Name**. This will be used to refer to the network throughout the rest of the system.
- 6. If required, provide a **Description** for the network.
- 7. If required, select a **Colour** for the network. This will be used to display routes using this network on maps.
- 8. Click Save.

#### **Deleting a network**

- 1. Highlight the network you wish to delete.
- 2. Click the **delete selected route network** hyperlink. A warning dialog is displayed to confirm that you wish to delete the network.
- 3. Click Delete.
- 4. If any system configuration parameters use this network, an error dialog is displayed advising which system configuration parameters must be changed before the network can be deleted. The network cannot be deleted while it is actively being used by any system parameter.
- 5. Click OK.

# **Appendix A**

## **Report Directory Structure**

The following table shows the structure of the reports directory. The directory mirrors One Transport's screens to aid ease of use. The locations of the reports themselves are shown in **bold**.

Area	Page	Search and Status tabs	Tab	Section
Processes	Single Passenger	Summary Panel		
		Personal Info	Applications	
		Status	Assessments	
			Journeys	
			Tickets	
People	Personal Info	Summary Panel		
		Search for people	Financial	
			Relationships	Cared For
			Special Needs	Special Transport Needs
			Education	School History
	Driver/Assistant Info	Summary Panel		
		Search for people	Checks	
			Training	
	Communications & Complaints	Search for communications		
Operations	Contractors	Summary Panel		
		Search for contractors	Routes	
			Vehicles	]
			Checks	
			Payments	
	Contracts	Summary		

## **Report Parameters**

The following table shows a list of One Transport report parameters by screen.

Area	Page	Tab	Parameter name	Туре	Description
Process	Single	Applications	APPLICATION_ID	Number	
	passenger	Assessments	RECORD_ID	Number	
		Invoices	STUD_ID	Number	
		Journeys	TRAN_ID	Number	STUD_TRIPS .TRAN_ID
		Tickets	TICKET_IDS	List <number></number>	List of TICKET_ID
			TICKET_ID		
			STUD_ID		
People	Personal info	Education	STUD_ID	Number	STUDENT.STUD_ID
		Financial	INVOICE_IDS	List <number></number>	List of INVOICE_ID
			INVOICE_ID	Number	Single INVOICE_ID
			STUD_ID	Number	
		Relationships			
		Special needs	NEED_ID	Number	Special Need ID
	Driver / assistant info	Bases	RECORD_ID	Number	
	assistant mo	Checks	CHECK_ID	Number	
		Role Details	PERSON_ID	Number	
		Routes	PERSON_ID	Number	
		Training	RECORD_ID	Number	
	Communication & complaints	-	COMM_ID	Number	COMMUNICATION _LOG.COMM_ID
Operations	Contractors	Details	STUD_ID	Number	
			CONTR_ID	Number	Contractor ID
		Checks	RECORD_ID	Number	
		Payments	PAYMENT_ID	Number	
		Routes	RECORD_ID	Number	Contractor ID
			ROUTE _STARTDATE	Date	
			ROUTE _ENDDATE	Date	

#### Appendix A

Area	Page	Tab	Parameter name	Туре	Description
Operations	Contractors	Vehicles	RECORD_ID	Number	TRS_FLEET_DET. RECORD_ID
	Contracts	-	R_COST_ID	Number	ROUTE_COST. R_COST_ID
	Routes	-	ROUTE_ID	Number	
		Passengers	ROUTE_ID	Number	
	Stops	-	STOP_ID	Number	
Utilities	Budget forecast	-	reportID	GUID	Unique ID, generated every time the report is run.
	Job manager	-	JOB_ID	Number	
	Reports				

# **Appendix B**

## List of UDFs

This is a list of the UDFs in One Transport v4 and the screens on which they are located. For more information on working with UDFs see the *RG\_Administration\_Managing\_UDFs* reference guide, available from www.onepublications.com and My Account.

Screens in v4	List of UDFs from Smart Client
Processes Single passenger Applications and Processes Multiple passengers Approve Applications	Application Entity
Processes Single passenger Assessments and Processes Multiple passengers Perform Assessments	Assesssment Entity
People Communications & complaints	Communication log
Operations Contract Details	Contract Entity
Operations Contractors Details	Contractor Entity
Operations Contractors Payments	Contractor Payment Entity
People Driver assistant info Routes	Driver and Assistant Journey Entity
People Driver assistant info Training	Driver and Assistant Training Entity
Operations Contractors Vehicles	Individual Vehicle Entity
Processes Single passenger Invoices and Processes Multiple passengers Invoice Passengers	Invoice Entity
Processes Single passenger Journeys and Processes Multiple passengers Allocate Journey	Journey Entity
People Personal info Special needs (Special transport needs SEN stage history Disabilities	Needs Entity
Processes Single passenger Payments out	Payment Entity
Operations Routes Details	Routes Detail Entity
Operations Routes Details	Routes Entity
Operations Stops Details	Stops Entity
Operations Routes Survey	Survey Entity
Processes Single passenger Tickets and Processes Multiple passengers Issue Tickets	Ticket Entity
Operations Contractors Checks	VehicleChecks Entity

## **Permissions**

Within One Transport there exists the concept of a permission.

Permissions are established by the Capita One development team and are assigned to specific user actions within the One Transport application. Permissions enable the user to undertake some actions, while preventing them from undertaking others.

## **Permissions Example**

Main Process: Transport Person

Sub Process: Invoice passenger

User action	User action permitted?	Read	R-Write	RW-Delete	Deny
Create new and/or edit existing invoice		No	Yes	Yes	No
Delete invoice		No	No	Yes	No

One Transport permissions are ordered using main and sub-processes.

Within each sub process there are a number of possible user actions provided by the application. This example details two user actions, **Create new and/or edit existing invoice** and **Delete invoice**.

There is no read permission for the **Create new and/or edit existing invoice** user action, as a read permission would be inappropriate for this particular action. If the user action had been **View invoice** then the **Read** permission would have been set to **Yes**.

The user can undertake the action as she has both **Read-Write (R-Write)** and **Read-Write-Delete** permissions. **Deny** is set to **No**. If **Deny** was set to **Yes**, then the user would be unable to undertake the action.

In the second example, **Delete invoice**, the only appropriate permission is **RW-Delete**, as this is the only permission that allows deletion. Neither **Read** nor **R-Write** would be appropriate. As before, the **Deny** action is set to **No**.

A full list of user permissions begins overleaf.

## **List of User Permissions**

Main process	Sub process	User action	Read	R-Write	RW- Delete	Deny
Addresses	Save Address	Save address	Yes	Yes	No	No
		Remove address from person address list	Yes	Yes	Yes	No
	Save Address Geocode	Save address geocode	NA	Yes	NA	No
	Save Linked Addresses	Link an address to a person's address history	Yes	Yes	No	No
	Person/Students Addresses	Create a student/person address in stops	Yes	Yes	Yes	No
		Search and select home addresses for both student and person/client	No	Yes	Yes	No
Administration	Comms Log Complaints	Change communication to a complaint	NA	Yes	NA	No
	Communication Log	Search and view communication logs	Yes	Yes	Yes	No
		View communication log details	Yes	Yes	Yes	No
		Search and view follow up message	Yes	Yes	Yes	No
		Create or update communication log and details	No	Yes	Yes	No
		Create follow up communication log	No	Yes	Yes	No
		Delete communication log	No	No	Yes	No
		Delete follow up communication	No	No	Yes	No
	Alert Processing	Read/maintain alerts	Yes	Yes	Yes	No
		Create/update alerts	No	Yes	Yes	No
		Delete alerts	No	No	Yes	No
	Linked	View linked documents	Yes	NA	Yes	No
	Documents	Link a new document/ update linked documents	No	NA	Yes	No
		Delete linked documents	No	NA	Yes	No
Person	Person Details	View person	Yes	Yes	NA	No
Administration		Create new and/or edit existing person	No	Yes	NA	No

Main process	Sub process	User action	Read	R-Write	RW- Delete	Deny
Person	Person Details	View personal information	Yes	No	NA	No
Administration		Person search	Yes	No	NA	No
Transport Admin & Utilities	Administration	View values for parameters and bases in base list	Yes	NA	NA	No
Ountes		Modify parameter values	No	NA	NA	No
		Add or remove bases in the base list	No	NA	NA	No
	Budget Forecast	Run budget forecast	Yes	Yes	NA	No
	Lookup Special Transport Needs	View list of needs	NA	Yes	Yes	No
		Add to or update entry in list of needs	NA	Yes	Yes	No
		Delete an entry from the list of needs	NA	No	Yes	No
	Nearest School Search	Execute search and view results	Yes	NA	NA	No
	Lookup Invoices	View the invoice reasons list	NA	Yes	Yes	No
		Add or edit the invoice reasons list	NA	Yes	Yes	No
		Delete reasons from the invoice reasons list	NA	No	Yes	No
	Default Budget Codes	Maintain budget code	NA	Yes	NA	No
	Default Assessment	Default assessment	NA	Yes	NA	No
	Default Journeys and Tickets	Configure default journey and ticket settings	NA	Yes	NA	No
	Default Invoices and Payments	Configure default invoice and payment settings	NA	Yes	NA	No
	Default Roles	Edit default roles	NA	Yes	Yes	No
	Lookup Vehicles	Edit vehicle type list	NA	Yes	Yes	No
	Default Configuration	View configuration settings	NA	Yes	NA	No
	RO Import	View RO import log	Yes	NA	Yes	No
		Clear RO import log	No	NA	Yes	No
Transport	Application	View application	Yes	Yes	Yes	No
Application & Assessment		Create new and/or edit existing application	No	Yes	Yes	No

Main process	Sub process	User action	Read	R-Write	RW- Delete	Deny
Transport Application & Assessment	Application	Delete application (If not approved)	No	No	Yes	No
Assessment	Application	Approve application	NA	Yes	NA	No
	Approval	Delete approved/rejected application	NA	Yes	NA	No
		Edit an existing approval record	NA	Yes	NA	No
	Assessment	View assessment	Yes	Yes	Yes	No
		Create new and/or edit existing assessment	No	Yes	Yes	No
		Delete assessment	No	No	Yes	No
		Calculate assessment	No	Yes	Yes	No
		Hyperlink to show five nearest schools	Yes	Yes	Yes	No
	Issue Assessment	Issue assessment	NA	Yes	NA	No
Transport Bulk Allocation	Perform Assessment	Approve / reject application	NA	Yes	NA	No
Transport Contractor	Contractor	View contractor details	Yes	Yes	Yes	No
Contractor		Edit contractor details	No	Yes	Yes	No
		Delete contractor	No	No	Yes	No
	Payments	View contractor payments	Yes	Yes	Yes	No
		Edit contractor payments	No	Yes	Yes	No
		Delete contractor payments	No	No	Yes	No
	Vehicle Check	View vehicle check details	Yes	Yes	Yes	No
		Edit vehicle check details	No	Yes	Yes	No
		Delete vehicle check details	No	No	Yes	No
	Vehicle Fleet	View vehicle data in route details	Yes	Yes	Yes	No
		Edit vehicle data in route details	No	Yes	Yes	No
Transport Contracts	Contracts	Create contracts	No	Yes	No	No
Contracts		Read contract details	Yes	Yes	Yes	No
		Maintain contract costs	Yes	Yes	Yes	No
		Add budget codes	No	Yes	Yes	No

Main process	Sub process	User action	Read	R-Write	RW- Delete	Deny
Transport	Contracts	Edit budget codes	No	Yes	Yes	No
Contracts		Remove budget codes	No	No	Yes	No
		View contract data in route details	Yes	Yes	Yes	No
		Edit contract data in route details	No	Yes	Yes	No
	Contract Revision	Add revision	No	Yes	Yes	No
		Edit revision	No	Yes	Yes	No
		Delete revision	No	No	Yes	No
	Budget Codes After Payments	Change budget code after a payment has been made	NA	Yes	NA	No
Transport Journey & Tickets	Mainstream journey	Search for and select passengers	Yes	Yes	Yes	No
TICKEIS		View mainstream journeys	Yes	No	No	No
		Create new and/or edit existing journeys	No	Yes	Yes	No
		Duplicate journeys	No	Yes	Yes	No
		Delete journeys	No	No	Yes	No
		Suggest route and stops	Yes	Yes	Yes	No
		Hyperlink to route loading for journey	-	-	-	-
		Show journeys required (bulk allocation)	Yes	Yes	Yes	No
		Suggest routes and stops (bulk allocation)	Yes	Yes	Yes	No
		Create journeys automatically (bulk allocation)	No	Yes	Yes	No
		Validate selected journeys (bulk allocation)	Yes	Yes	Yes	No
		Create selected journeys (bulk allocation)	No	Yes	Yes	No
		Preview passengers to be transferred (bulk transfer)	Yes	Yes	Yes	No
		Transfer selected passenger (bulk transfer)	Yes	Yes	Yes	No
	DtD Journey	(As per mainstream journeys for single passenger)				

Main process	Sub process	User action	Read	R-Write	RW- Delete	Deny
Transport Journey & Tickets	Self-Sourced Journey	(As per mainstream journeys for single passenger)				
	Journey Costs	Read journey costs	Yes	Yes	NA	No
		Edit journey costs	No	Yes	NA	No
	Route Optimisation		NA	NA	NA	No
	Issue Tickets	View/ add / edit /delete tickets	Yes	Yes	Yes	No
		View/ add / edit tickets	Yes	Yes	No	No
		View tickets	Yes	No	No	No
		Issue bulk tickets	No	Yes	No	No
	Print Tickets	Print tickets through the following pages: <b>Print Tickets, Issue</b> <b>Tickets</b> and <b>Bulk Tickets</b>	Yes	NA	NA	No
Transport	Stop	Search for and select stops	Yes	Yes	Yes	No
Network		View stops	Yes	Yes	Yes	No
		Create new and/or edit existing stops	No	Yes	Yes	No
		Delete stops	No	No	Yes	No
		View map	Yes	Yes	Yes	No
		Position stops on a map	No	Yes	Yes	No
		Hyperlink to route in <b>Routes</b> tab	-	-	-	-
		Hyperlink to passenger in <b>Boarding and Alighting</b> tab	-	-	-	-
		Hyperlink to route in <b>Boarding and Alighting</b> tab	-	-	-	-
	Route	Search for and select routes	Yes	Yes	Yes	Cannot access routes
		View routes	Yes	Yes	Yes	No
		Create new and/or edit existing routes	No	Yes	Yes	No
		Duplicate (copy) routes	No	Yes	Yes	No
		Delete routes	No	No	Yes	No

Main process	Sub process	User action	Read	R-Write	RW- Delete	Deny
Transport Network	Route	Insert stops into/edit stops on routes	No	Yes	Yes	No
		Remove stops from routes	No	No	Yes	No
		Mirror stops on routes	No	Yes	Yes	No
		View route map	Yes	Yes	Yes	No
		Hyperlink to stop in <b>Stops</b> tab	-	-	-	-
		Hyperlink to stop in Loading tab	-	-	-	-
		Hyperlink to passenger journey in <b>Passengers</b> tab	-	-	-	-
	Surveys	View survey	Yes	Yes	Yes	No
		Create new and/or edit existing survey	No	Yes	Yes	No
		Delete survey	No	No	Yes	No
	Driver/PA Route Allocation		NA	NA	NA	No
Transport Person	Driver or Passenger Assistant	Control the display & recording of <b>Driver &amp;</b> assistants tabs in <b>People</b> and <b>Route</b> focuses	Yes	Yes	Yes	No
		View and edit D&PA	Yes	Yes	No	No
		View D&PA	Yes	No	No	No
	Record DBS	Control the display and recording of DBS checks	Yes	Yes	Yes	No
		View and edit checks	Yes	Yes	No	No
		Can View checks	Yes	No	No	No
	Training Course	Will control display and recording of training tab	Yes	Yes	Yes	No
		View and edit course details	Yes	Yes	No	No
		Can view course details	Yes	No	No	No
		Delete a transport need for a person	No	No	Yes	No
	LIF	View LIF	Yes	Yes	Yes	No
		Create new and/or edit existing LIF	No	Yes	Yes	No
		Delete LIF	No	No	Yes	No

Main process	Sub process	User action	Read	R-Write	RW- Delete	Deny
Transport Person	Print Invoices	Print invoices through the following pages: Print invoices, Bulk Print   Invoice	Yes	NA	NA	No
	Invoice	View invoice	Yes	Yes	Yes	No
	Passenger	Create new and/or edit existing invoice	No	Yes	Yes	No
		Delete invoice	No	No	Yes	No
	Disbursements	View payments	Yes	Yes	Yes	No
		Create new and/or edit existing payments	No	Yes	Yes	No
		Delete payments	No	No	Yes	No
		Add or edit payment prefix	No	Yes	Yes	No
Student Data	Addressee	View addressee	Yes	Yes	NA	No
		Edit addressee	No	Yes	NA	No
	School History	View school history	Yes	Yes	Yes	No
		Create new and/or edit existing school history	No	Yes	Yes	No
		Delete school history	No	No	Yes	No
	SEN Needs	View disabilities	Yes	Yes	Yes	No
		Create new and/or edit disabilities	No	Yes	Yes	No
		Delete disabilities	No	No	Yes	No
	Special Transport Needs	View special transport needs	Yes	NA	Yes	No
		Create new and/or edit special transport needs	No	NA	Yes	No
		Delete special transport needs	No	NA	Yes	No
	Student Carer Details	View student carer details	Yes	Yes	Yes	No
	Details	Create new and/or edit student carer details	No	Yes	Yes	No
		Delete student carer details	No	No	Yes	No
		View carer for	Yes	Yes	Yes	No
	Student Court Orders	View student court orders	Yes	Yes	Yes	No

Main process	Sub process	User action	Read	R-Write	RW- Delete	Deny
Student Data	Student Court Orders	Create new and/or edit student court orders	No	Yes	Yes	No
		Delete student court orders	No	No	Yes	No
	Edit SEN Stage History	View SEN stage history	NA	NA	Yes	No
	Edit SEN Stage History	Create new and/or edit SEN stage history	NA	NA	Yes	No
		Delete SEN stage history	NA	NA	Yes	No
	Edit FSM History	View FSM details	NA	NA	Yes	No
	Public Care Details	View public care details	Yes	Yes	Yes	No
		Create new and/or edit public care details	No	Yes	Yes	No
		Delete public care details	No	No	Yes	No
Transport	Home	Return to home menu	Yes	NA	NA	No
Utilities		Return to v4 login menu	Yes	NA	NA	Yes
Admission Setup and population	Transfer Groups/ Sub Group Administration	View the subgroups in bulk assessments from administration	Yes	No	No	No

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