

## **Transport Back Office**

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Handbook



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# **01** Document Change Control

Date	Release	Description
Spring 2020	3.71	Entitlement Status is now displayed in the Reason column in the Assessment Summary for single passengers. See <i>Creating an Individual Assessment</i> on page <i>17</i> .

# **02** 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.

## **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 different 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.

## **03** 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 the <u>One</u> <u>Publications</u> website.

#### 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	senger Multiple passengers Bulk tra	ansfer
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 <b>•</b> to NCY <b>•</b>	
	Use contains matching for names	
	[clear] Search	

- 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 60.

- 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	enger Multiple passengers Bulk tr	ansfer			
Personal info	Process status	🛔 B	D	ID 9075659	
Search for	Active people in this authority	10 H	(no em	ail address)	[ actions ♥]
	[ clear   show all   hide all ] Search	[Passenger info   F	Personal info   Driver / assistant info ]		
Name	DOB Postcode				
A	^	Applications	Assessments Journeys Tickets	Invoices Payments out	
A	and the second sec	Date 💠	Address	Destination	Status
A					
A					
A	TRACTOR OF TAXABLE				
A	and the second sec				
٨	the second se	[ create new application of the second secon	ation   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.

[one] P	<mark>rocesses</mark> People Operati	ions Ut	tilities Admin	Welcome SYSA[]MIN	L I	Help	Change Password	Logou
Single pass	senger Multiple passengers	Bulk tra	ansfer					
Personal info	Process status		No person select	ted				
Between	10/03/2017 and 10/03/20	017						
Search for	all passengers	•						
in NCY	all NCYs	•	Applications Assess	ments Journeys Tickets	Invoices		nents out	
and from	postcode		Applications Assess	ments Journeys Hickets	Invoices	Payr	nents out	
who	need to travel to	•						
base	base or school group	Q. <b>X</b>						
and who	do or do not have an application	•						
with status		v						
and who	do or do not have an assessment	•						
with status		¥.						
and who	do or do not have a journey	•						
which	does or does not have any ticket	*						
	[ about	Search						

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 37.

- 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 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		De De		DOB 01/	ID 1575		
Between	08/10/2014 an	d 08/10/2014	65	of the she is	(no email address)			[actions ♥]
Search for	all passengers	•	[Passenger info	Personal info   Driver / assista	int info ]			
who	need to travel to	•	Applications	Assessments Journey	rs Tickets Invoices F	ayments out		
	[ clear   show	all   hide all ] Search	Date 😩	Address	Desti	nation	Sta	atus
Name	Date Of Birth	PostCode						
A		_						
A								
A								
A	a management of		[ create new app	lication   delete ]				
Α		No. of Concession, Name						

#### **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 <u>Process</u> on page *11*.
- 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	✤ Transport applied for
A		^	Between 651 Q and Westfield Middle S Q X Out & return -
A	-		Every XXXX from dd/mm/yyyy * until dd/mm/yyyy
A			✓ Application details
A	-		Date of application dd/mm/yyyy Memo +
A			Origin of application
A	-		Applicant name
A	And a second sec		Relationship claimed    Select relationship claimed   with parental responsibility
A	-		Phone number
A			Email
A	a College		Address
A			Created By at on
A	-		Last updated by at on
A			✓ Other requirements
A			Low Income Family status claimed
A			Disbursement requested
A	and the second		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.

		Cho	ose an addr	ess		
Looking for	β5				×	Search
		A	Address 💠			
65						
View 1 - 1 of	1				< prev   r	next >

- 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	Base	Туре
Abbey Middle S	chool	4001	999	JUN	
Westfield Middl	e School	4033	999	MID	
Showing 1 - 2	of 2			< p	rev   next >
[view details]				[cancel]	Select this base

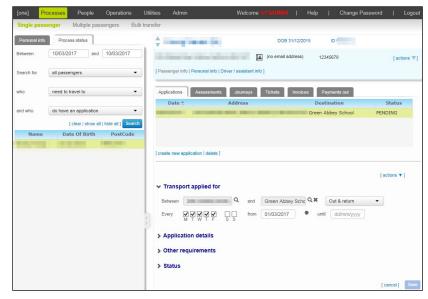
- e. Enter search criteria for the destination address and then click the **Search** button to view a list of matching bases.
- f. Highlight the destination base and then click the **Select this base** button to select the base and close the dialog.
- 6. If required, select a journey type from the **Out & 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 *11*.
- 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 o	of decisions	]					
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 the <u>One Publications</u> website.

#### **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 *11*.
- 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 SY SADWIN	Help   Change F	assword   Logout
Single pass	senger Multiple pas	sengers Bulk	transfer			
, Personal info	Process status		A THE	- III		
Between	10/03/2017 and	10/03/2017	In the lot of	(no email ad	ldress) 12345678	[actions ¥]
Search for	all passengers	•	[Passenger info   Perso	nal info   Driver / assistant info ]		
who	need to travel to	•	Applications Ass	essments Journeys Tickets	Invoices Payments out	
			Date 💠	Address	Destination	Status
and who	do have an application	•	c	succession of succession and succession of the		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 *11*.
- 2. Select the Assessments tab.
- Click the create new assessment hyperlink to display editable fields related to assessment details.

#### **Processing Transport Applications**

В	.B			
B	B	✓ Assessment criteria		
в	в			
B	В	Valid from	dd/mm/yyyy * until dd/mm/yyyy	
B	BC	Assessment address	36 I C	Q.*
B	3C	Destination location	St College	Q <b>X</b> *
B	C	Destination criteria	Nearest site	
B	3B			
B	B	Alternative criteria	Nearest site	
B				[Nearest school search ]
B	D		Calculate	
B	ЗC		Curculate	
в	BC	> Assessment results	(summary)	Memo 🕈
B	:В	Assessment results	(details)	
В	٨B	# Assessment results	(details)	
B	3D			
B	D D			
Buse 1 - 100 of 742	< prev   next >	Entitlement - Sele	ct Entitlement 👻	[cancel] Save Issue
[ create a new person   expor				

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.

Which application do you want to assess?						
	Sel	et the details you'd like copied into the new a	ssessment			
	Address 🜲	Destination	From	Until		
H	100 C 100 C	Sharnbrook Upper Schoo	09/10/2014	31/07/2016		
1		Sharnbrook Upper Schoo	06/10/2014	31/07/2016		
			[cancel]	Select		

- 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 add	ress		
Looking for	β5			×	Search
		Address 💠			
65					
View 1 - 1 of 1				< prev   ne	xt >
			[ canc	el] Select thi	s 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 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 s	select			
Active	✓				
					[clear] Search
Base Na	ame ≑	School Number	LEA	Base	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 ]				[cancel	] 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.

🗸 Assessr	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	chool		Show calculated nearest sch	nools ]
> Assessr	ment results	details)			
Entitlement	NELG -	Not Eligible	•		[ cancel ] Save Issue

10. If required, click the Show calculated nearest schools 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 show 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** drop-down menu. The status is displayed in the **Reason** column of the Assessments Summary.

Applications Assessments Journeys	Tickets Invoices	Payments out		-
Address	Destination	Start	Reason	Issued
		10/02/2020	NELG	No
[ create new assessment   delete ]				
> Assessment criteria	Calculate			[actions V]
Assessment results (summary)				Memo 🕇
Assessment results (details)      Entitlement NELG - Not Eligible	•	1	[cancel]	ave Issue

#### **Deleting an Assessment**

- 1. Select a passenger. For more information on selecting a passenger, see <u>Selecting a Passenger</u> to Process on page *11*.
- 2. Select the Assessments tab to display a list of the student's assessments.

Applications	Assessments	Journeys	Tickets	Invoices	Pay	ments out		
	Address			Destination		Start	Reason	Issued
						10/02/2020	NELG	No
[ create new asses	ssment   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	
	01/09/2013	Assessment	31/08/2014	
Sub-scenario two	02/09/2013	Application approved	31/08/2014	
	02/09/2013	Assessment-	31/08/2014	
Sub-scenario three	01/09/2013 Application app	roved 31/12/2013		
	01/08/2013 Assessment	31/12/2013		
Sub-scenario four		01/01/2014 Applicat	31/08/2014	
		01/01/2014	Assessment	31/12/2014

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 *11*.
- 2. Select the Journeys tab.
- 3. Click the **add new journey** hyperlink to display editable fields related to journey details.

[one] Pr	ocesses People	Operations	Utilities Admin		Welcome <del>sysadmin</del>	Help	Change Passwor	d   Logout
Single pass	enger Multiple pas	sengers Bulk 1	transfer					
Personal info	Process status		\$ E	an Fri	DOB	ID	-	
Between	20/10/2017 and	20/10/2017	1,000,0000,0	Simshire	e, 🔝 (no email addi	ress)		[actions 🔻]
Search for	all passengers	•	[Passenger info ]	Personal info   Driver / as	sistant info ]			
who	need to travel to	•	Applications	Assessments Jou	rneys Tickets I	nvoices Payme	nts out	
and who	do have an application	•		ent & future journeys	Description		From	Until
	[ clear   show all	hide all ] Search	Koute	11111 33	Description		rrom	Until
Name	Date Of Birth	PostCode						
Entered and	R. CONSTRUCT	C						
I		YL8						
			[ add new journey	duplicate journey   delet	e journey ]			
			Between 1 Lo	wer Street, Eggw Q X	and Test Nursery	Q <b>X</b> *	Out & return	•
			every VV		rom dd/mm/yyyy * Sugges	until dd/mm/yyyy	using Main:	stream 👻
			Route	route		Q.X.*	Empty Seats [Lo	ading ]
			Leaving from	stop	QX @ hh:mm	going to stop	٩	X @ hh:mm
			Returning from	stop	QX @ hh:mm	back to stop	٩	× @ hh:mm
			Applied on	dd/mm/yyyy	С	ost	per P	eriod 🔹
			Processed on	dd/mm/yyyy	E	ktra seats 0		
			Entitlement	- Entitlement reas	son - 🔹			Memo 🕇
View 1 - 2 of 2	2	< prev   next >						[cancel] Save
[ export ]								

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

		Choose an add	ress		
Looking for	þ5 <b></b>			×	Search
		Address 🔷			
65					
View 1 - 1 of 1				< prev   ne	ext >
			[ canc	el] Select thi	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	select		
Active	✓			
				[clear] Search
Base N	ame ≑	School Number	LEA	Base Type
Abbey Middle S	chool	4001	999	JUN
Westfield Middl	e School	4033	999	MID
Showing 1 - 2 o	of 2			< prev   next >
[ view details ]				[cancel] 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 the <u>One Publications</u> website.

- 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:
  - Select Door-to-Door from the using menu. Editable fields related to door-to-door journeys are displayed.

Between 1 Lower	Street, Eggw <b>Q X</b> and	Test Nursery	Q <b>X</b>	Out & retu	m 🔹
every X X X X		d/mm/yyyy 🕷 u	until dd/mm	/yyyy using	Door-to-door 💌
Route	route		Q×	[ manage route	:]
Leaving from	address	hh:mm	going to	address	QX @ hh:mm
Returning from	address	hh:mm	back to	address	<b>Q X</b> @ hh:mm
Applied on	dd/mm/yyyy				
Processed on	dd/mm/yyyy	Ext	tra 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.

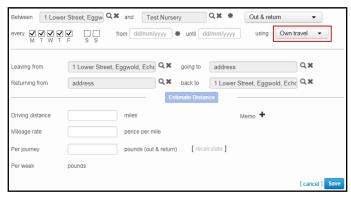
		Choose an addre	ess	
ooking for	21	100 B.B. 194	Se	arch
		Address 💠		
2				
View 1 - 1 of	1		< prev   next >	
[ Choose a sto	. 1		[cancel] Select this addr	

• 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.

#### **Processing Transport Applications**

	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
Showing 1 - 1 of	f 1	< prev   next >

- 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 <u>Process</u> on page *11*.
- 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 92.

A							[actions 🔻 ]
AAAA	1000 mm	Between 2 /	from		am Jur <b>Q X *</b>		▼ nstream ▼
A	and the second second	Route	TestRoute-Test Route	9	Q <b>X</b> *	Empty Seats	[Loading]
A		Leaving from	stop	QX @ hh:mm	going to stop	p	hh:mm
A		Returning from	stop	<b>Q X @</b> hh:mm	back to stop	p C	🗙 🧟 hh:mm
A	CONTRACTOR OF THE	Applied on Processed on	dd/mm/yyyy dd/mm/yyyy	Fv	tra seats 0		
A	COLUMN THE OWNER	Entitlement	STTL - Stat Elig Low Ir				Memo 🕂
A	-	> 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 <u>Process</u> on page *11*.
- 2. Select the **Journeys** tab.
- 3. Highlight the journey you want to duplicate.

#### **Processing Transport Applications**

[one] Pi	rocesses People Operations I	Utilities Admin	Welcome SY 54.0WIM	Help	Change Passwor	d   Logout
Single pass	senger Multiple passengers Bulk t	ransfer				
Personal info	Process status	🌲 Cranta I	<u>.</u>			
Between	10/03/2017 and 10/03/2017		(no email a	ddress)		[actions ♥]
Search for	all passengers	[Passenger info   Personal inf	o   Driver / assistant info ]			
who	need to travel to 👻	Applications Assessme Show Current & future		Invoices Payme	ents out	
and who	do have a journey 🔻				-	Until
	[ clear   show all   hide all ] Search	SYS-R2 DODDD DD	5 Description	m	From 02/07/2014	Until
Name	Date Of Birth PostCode					
	Contraction Contraction	[ add new journey   duplicate j	ourney   delete journey ]			

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

Code			
Description			
lase	Schools		Q. <b>X</b>
уре	All types		-
rea	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 <u>Process</u> on page *11*.
- 2. Select the **Journeys** tab to view a list of the passenger's journeys.
- 3. Highlight the journey you want to delete.

[one] Pr		Utilities Admin transfer	Welcome SYSADWIN	Help   Change Pass	word   Logou
Personal info	Process status	* C			
Between	10/03/2017 and 10/03/2017	And the second second second	(no email address)	10.000	[actions ♥]
Search for	all passengers	[Passenger info   Personal info	Driver / assistant info ]		
who	need to travel to 👻	Applications Assessmen		es Payments out	
and who	do have a journey 👻	Show Current & future j		_	1
	[ clear   show all   hide all ] Search	SYS-R2 CODOC CO	Description Siva Base	From 02/07/2014	Until
Name	Date Of Birth PostCode				
	^				

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

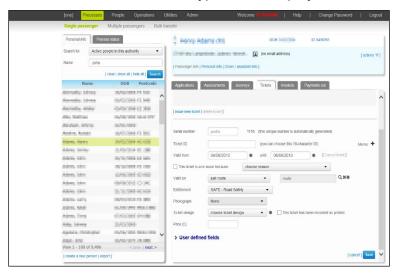
#### **Creating a Ticket**

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 *11*.
- 2. Select the **Tickets** tab.
- 3. Click the **Issue New Ticket** hyperlink to display editable fields related to ticket details.



4. 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 unlink	ed from the selected journey		
Source	Address	Destination	From	Until
Mainstream journey		Beeches Special School	09/03/2001	
Mainstream journey		Abbey Middle School	01/06/2001	
Mainstream journey		Sharnbrook Upper School	01/09/2013	
Mainstream journey		Sharnbrook Upper School	18/12/2013	
			[ cancel   create a blank tic	ket   Copy & Create

- 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 *11*.

2. Select the **Tickets** tab. A list of the selected passenger's tickets is displayed.

who	need to travel to	•	Applications As	ssessments Journe	eys Ticke	ets Invoices Paymer	nts out	
	[ clear   show a	II   hide all ] Search	Show Current	& future tickets	•			
Name	Date Of Birth	PostCode	Serial number 💠	Ticket ID	Rout	e / contractor	From	Until
4		^	7	00000015			27/07/1994	
4		A	15	0000023			27/07/1994	
4			22	0000030			28/07/1994	
4								
4			[ issue new ticket   del	ete ticket]				
A								
4			Serial number	prefix	7 (this	unique number is automatically	generated)	[ actions V
4			Ticket ID	00000015	(you	u can choose this 18-character	ID)	Memo 🕂
4			Valid from	27/07/1994	* unti	il dd/mm/yyyy	🛊 [Cancel ticket]	
4			This ticket is a re-	issue because	choose reaso	on		
4			Valid on	all routes				
4			Entitlement	entitlement code				
A ,			Linuement					
-			Ticket design	report load failed		<ul> <li>This ticket has been</li> </ul>	n recorded as printed	
4			Price (£)	0				
4			This ticket was not cre	ated from an associated	ljourney			
4			[ send for printing ] (O	pens in a new browser t	ab)			[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		
	Anywhere LEA	
	County Hall Main Street	
	Anywhere	
	fao Parent / Guardian of	
	N	
	and the second se	
	and water	
	29/08/2014	
	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. $\label{eq:charge}$	
	Yours sincerely	
	rours anderery	
	Transport Coordinator	
	Pass Number: 34	
	Student: N	
	Issue Date: 26/08/2014	
	Expiny Date: 20/08/2014	

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 *11*.
- 2. Select the **Tickets** tab.

3. Highlight the ticket you want to delete.

[one] P	rocesses People Operations	Utilities Admin	Welc	ome <mark>SYSADWIN</mark>   Help	Change Password	Logo
Single pass	senger Multiple passengers Bul	k transfer				
Personal info	Process status	÷			ID 1106	
Between	10/03/2017 and 10/03/2017			(no email address)		[actions W
Search for	all passengers	[ Passenger info   Pers	onal info   Driver / assista	nt info ]		
who	need to travel to		sessments Journey		yments out	
and who	do have a journey 👻	Show Current &	future tickets	Route / contractor	From	Until
	[ clear   show all   hide all ] Search		00000025	Koute / Contractor	28/07/1994	Until
Name	Date Of Birth PostCode					
		^				
		[ issue new ticket   dele	te 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 *11*.
- 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	essments Journ	neys Ticket	s Invoices	Payr	nents out	
	[ clear   show	all   hide all ] Search	Serial number 💲	Invoice ID	Issue	d on Reaso	n		Amount
Name	Date Of Birth	PostCode	46	011		Invoic	e for 1995	/1996	25.00
A	second strength in								
A	And a state of the								
A									
А	1.00		[create new invoice ] o	delete invoice ]					
			-						
A			Serial number	prefix 6	76 (this un	ique number is	automatical	ly generated)	
A									
A	10.00	and the second second	Invoice ID	Invoice ID		(you can ch	loose this 18	3-character ID)	Memo •
A			Invoice issued on	05/11/2014	* and du	e for payment o	on 05	5/11/2014	*
4								*	
	10000		Covering period from	dd/mm/yyyy	* until	dd/mm/y	(YYY	*	
			Cancelled on	dd/mm/yyyy	becau	se Nothing	selected	~	
4	100 M 100 M								
		100.000	Reason for invoice			*	Address	to cover with G	nancial responsibility
4		ALC: NO	Reason tor invoice					to carer with in	lancial responsibility
		1000	Route			Q	×		
			Amount	a a a a a a a a a a a a a a a a a a a	(pounds)		Budg	et code	
	and the second s	and the second second							
			Received amount		(pounds) on	dd/mm/yyyy	for	reason	

- 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 146.

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.

ode		
Description		
lase	Schools	Q.#
уре	All types	-
vrea	All areas	•
Dates	All	•
		[clear] Search
Code	Description	Area Empty seats
	ew	< 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 <u>Process</u> on page *11*.
- 2. Select the **Invoices** tab. A list of the passenger's current invoices is displayed.
- Highlight the invoice you want to record payment for. Editable fields relating to that invoice are displayed.

Astron Astron			
A		Serial number	prefix 680 (this unique number is automatically generated) [actions ¥]
A		Invoice ID	Invoice ID (you can choose this 18-character ID) Memo +
A		Invoice ID	(you can choose this to-character ib) Memo
A	and the second		
A		Invoice issued on	05/11/2014 * and due for payment on 06/11/2014 *
A			
A		Covering period from	02/11/2014 * until 03/11/2014 *
A		Cancelled on	dd/mm/yyyy because Nothing selected -
A			
A	10000		
Α	and the second	Reason for invoice	Invoice for 2001/2002 * Address to carer with financial responsibility
A		Route	QX
A	and the second second		
A		Amount	1 * (pounds) Budget code
A	10 M		
A	and the second se	Received amount	(pounds) on dd/mm/yyyy for reason
A			General en cammelitit
A		for a first state of the state	_
A	and the second se	[ send for printing ]	[cancel] Save

- 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 *11*.
- 2. Select the **Invoices** tab. A list of the passenger's current invoices is displayed.

Personal info	Process status	🔹 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   Personal info   Driver / as	sistant info ]	
who	need to travel to 🔹	Applications Assessments Jour	rneys Tickets Invoices Payments out	
	[ clear   show all   hide all ] Search	Serial number 💠 Invoice ID	Issued on Reason	Amount
Name	Date Of Birth PostCode	45 010	Invoice for 1995/1996	25.00
A				
A				
A	the second se			
A	Contraction (Sec. 19)	[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 <u>Process</u> on page *11*.
- 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.

who	need to travel to 🔹	Applications Assessments Journeys Tickets Invoices Payments out
	[ clear   show all   hide all ] Search	Date of payment Period from Until Amount
Name	Date Of Birth PostCode	
A	_	
Α	A REAL PROPERTY OF	
Α		[add ann annard [ delate annard ]
Α		[add new payment   delete payment ]
Δ		
Α		For journey QX
۵ ۵		Or other reason Memo
A	Contract of the local division of the local	
Δ		
Α	A REAL PROPERTY AND INCOME.	Serial number 3 (this unique number is automatically generated)
Д	NOT THE OWNER OF THE OWNER OF	Payment ID (you can choose this 18-character ID)
Α	includes and includes	
ρ	and the second s	
A	1.0000000000000000000000000000000000000	Entered on 05/11/2014 * Due on 05/11/2014 * Paid on dd/mm/yyyy
Δ	ALC: NOTE: N	Period from dd/mm/yyyy * until dd/mm/yyyy *
A		Cancelled on dd/mm/yyyy because
Δ	A ROOM AND AND AND	
Δ		
Δ		Amount [calculate] * (pounds) Payee Select a person Q** Budget code *
μ		
ρ	a suprem	[cancel] Save
۵		[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.



- 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	elf	N	N		
		[ ca	ancel][Search a	Il people ] Sel		

- 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 *11*.
- 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 Invoices	Payments out	
	[ clear   show all   hide all ] Search	Date of paymen	t Period from	Until	Amount	
Name	Date Of Birth PostCode		03/11/2014	05/11/2014	10	
A	and the second second					
A	^					
A	A DECK MARKED					
А	the second se	[ add new payment	delete payment ]			
A	a state of the second					
A		Feelman		Q. <b>X</b>	1.00	tions <b>v</b> ]
A	the second second	For journey		4.6	[ act	ions <b>v</b> j
A	100 CO. 100 CO.	Or other reason	Test		Me	emo 🕂
A						
A						
A	a second s	Serial number	4 (this u	inique number is automatically	generated)	
A	AND DO NOT	Payment ID		(you can choose this	s 18-character ID)	
A	and the second s					
A						
A		Entered on	05/11/2014 *	Due on 06/11/2014	* Paid on dd/mm/yyyy	
A		Period from	03/11/2014 *	until 05/11/2014	*	
A		Period Ironi	03/11/2014	03/11/2014	-	
A		Cancelled on	dd/mm/yyyy	because Nothing selecte	ed 👻	
A						
A		Amount [calculate]	10 * (pounds) Pa	yee SL	Q X * Budget code Allowances	• *
Α	10 B B B B B B B B B B B B B B B B B B B	Amount [calculate]	(pounds) Pa	yee	Allowances	* *
A	and the second s					
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 Process on page *11*.
- 2. Select the **Payments out** tab. A list of payments that have been made to that passenger is displayed.

[one] Pr	ocesses People	Operations l	Jtilities Admin	Welcom	e <mark>sysadwin</mark>	Help   Chang	e Password	Logout
Single pass	enger Multiple pass	sengers Bulk tr	ransfer					
Personal info	Process status		A F	- 10 mil				
Between	10/03/2017 and	10/03/2017			(no email address)			[actions 🔻]
Search for	all passengers	•	[Passenger info   Perso	nal info   Driver / assistant i	info ]			
who	need to travel to	•	Applications Ass	essments Journeys	Tickets Invoices	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	PostCode						
		^	[ add new payment   del	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 *60*.

#### 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.

[01	ne]	Process	es Po	eople	Operations	Utilities	Admin	Welcom	e SYSADMIN	Help	I	Change Password	Т	Logout
Si	ngle pa	assenger	Multi	ple pass	engers E	lulk transfer								
P	erform a	assessment	App	prove appli	cations Alle	ocate journeys	Issue	tickets Invoice passengers						
Pe	rform as	sessments	for	Admis	sions with prefer	ences	•	Accepted • in	admissions tr	ansfer group	Q <b>X</b>	sub-group		<b>Q.X</b>
Scl	hools			All sch	nools			Q. <b>X</b>						
-														
Us	e this cr	iteria for the	destination	. (	Nearest site		•	and this criteria for the alternativ	Near	est site		•		
As	sessme	nts will run fi	rom	10/03/2	2017 (or take s	start date from scho	ool)	and will end on dd/mr	ууууу					
Cre	eate nev	v assessme	nts where r	none exist	for the above dat	e range	but do	n'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	D		
	(		Ĩ	clear ] Search
		Transfer group		

- 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-grou	qı
Looking for	Sub-group	
		[clear] Search
	Sub-group	
Subgrou	ip 1- Other LA OAA	
Subgrou	ip 2 - Other LA Non OAA	
Online Added	School	
Online Added	School	
View 1 - 4 of	1	< 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	✓				
					[clear] Search
Base N	ame 🔶	School Number	LEA	Base	е Туре
Abbey Middle S	School	4001	999	JUN	
Westfield Midd	le 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 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] Processes	People	Operations	Utilities	Admin	Welcome	9 SYSADN	IN I	Help	Cha	ange Password	Logout
Single passenger Mu	ltiple passe	engers Bi	ulk transfer								
Perform assessments A	pprove applic	ations Allo	cate journeys	Issue tickets	Invoice passengers						
Perform assessments for	Applicat	tions with pendi	ng periods	- between	dd/mm/yyyy a	nd (dd/m	m/yyyy				
Schools	All scho	ools		Q. <b>X</b>							
						Ignore	application	s where LIF	F is claimed	but none is on file	✓
Use this criteria for the destinat	tion [	Nearest site		<ul> <li>and this</li> </ul>	criteria for the alternative	s N	earest site		•		
Assessments will run between t	the dates on th	he relevant appli	ication, or betweer	the above two dat	tes if they are more restri	ctive.					
Create new assessments where	e none exist fo	or the above date	e range	but don't alter e:	xisting assessments		•				
										[ clear   preview	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.

Looking for					
LEA	All				
Туре	Туре				
Control	Please	select			
Active	$\checkmark$				
					[clear] Search
Base	Name 🔶	School Number	LEA		[ clear ] Search Base Type
Base Abbey Middle		School Number	LEA 999	JUN	
	e School	4001		JUN MID	
Abbey Middle	e School	4001	999		
Abbey Middle	e School	4001	999		
Abbey Middle	e School	4001	999		

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.



 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 Appr	ove applications Allocate journey	Issue tickets Invoice passengers	
Perform assessments for	Students in NCYs	from NCY  to NCY	
Schools	All schools	Q. <b>X</b>	
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 scho	bol) and will end on dd/mm/yyyy	
Create new assessments where no	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	<b>~</b>				
					[clear] Search
Base	Name 🔶	School Number	LEA	Bas	е Туре
Base Abbey Middle		School Number 4001	LEA 999	Bas	е Туре
	School				е Туре
Abbey Middle	School	4001	999	JUN	е Туре
Abbey Middle	School	4001	999	JUN	е Туре
Abbey Middle	: School Idle School	4001	999	JUN MID	e Type

- 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. 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.



 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.

[one]	Processes	People	Operations	Utilities	Admin			Velcome				lelp		Chang	ge Pas			Logou
Single pa	issenger	Multiple pas	ssengers	Bulk transfer														
Perform a	issessments	Approve ap	plications	Mocate journeys	Issue tick	ets In	voice passe	ingers										
Approve	e 🔻 all mai	nstream applica	tions in	all postcodes	for	any scho	ol or schoo	ol group	Q <b>X</b>	and N	ICY from	m	NCY	•	to	NCY	•	
that are pr	ending betweer	10/03	/2017 and	dd/mm/yyyy	and t	hat have	issued	•	assessm	ents ma	arked as	5	choo	se eligib	ole statu	us(es)		•
Applicatio	n approvals will	run between th	e above dates, o	or between the dates	of the releva	int assessm	nent if they a	are more re	estrictive.									
Mark appr	roved applicatio	ns as	choose approv	ved status	•													
														[ prev	icw]	Start app	rovals	process

- 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	✓			
				[clear] Search
Base Na	ame ≑	School Number	LEA	Base Type
Abbey Middle S	chool	4001	999	JUN
Westfield Middle	e School	4033	999	MID
Showing 1 - 2 o	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 the range of NCYs 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.

ow new journeys required for main		stcode with an approved			d dd/mm/yyyy
school or school group	Q X and NCY from NC		ssengers with special transport ne	eds will not be included)	Previe
		A62 B			
Passenger	Address	Destination	Route	From	То
	11 te	the state of the	٩	٩	٩
1	Keys		٩	٩	٩
			٩	٩	٩
	376 /		٩	٩	٩
K	376 /	THE REAL PROPERTY.	٩	٩	٩
] N	22 W		٩	٩	٩
] r	376		Q	٩	Q
] S	22 W	the second of	٩	٩	٩
5			٩	٩	Q
s			٩	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 the <u>One</u> <u>Publications</u> website.

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 in	
between 09/10/2014	and dd/mm/yyyy * for school Q.X
travelling on route route	Q * with contractor Q * and entitlement any -
Tickets will run between the above	a dates, or between the dates of the relevant journey if they are more restrictive, Tickets will have these details:
Serial number prefix	prefix (the unique suffix number will be allocated automatically)
Ticket price	price
Valid for	any route or contractor
Ticket Design	choose licket design
	[cancel] Issue Tickets

- 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	Туре				
Control	Please :	select			
Active	✓				
					[clear] Search
Base	Name 💠	School Number	LEA	Ba	se Type
Base   Abbey Middle		School Number 4001	<b>LEA</b> 999	Ba JUN	se Type
	School	4001			se Туре
Abbey Middle	School	4001	999	JUN	se Туре
Abbey Middle	School	4001	999	JUN	se Type
Abbey Middle	School	4001	999	JUN	se Type

- 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			
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.

Active		
	[Clear Search]	Search
Contact	Telephone	Active
Ma	0	<b>V</b>
te		<b>V</b>
an		✓
Hu r	4	<b>√</b>
Jo	8	<b>√</b>
as		<b>√</b>
Jo	8	<b>√</b>
Ch	9	<b>√</b>
Jo	0	<b>√</b>
Be	2	× ~
	<pre> &lt; prev  </pre>	next >
	Ma 'a'a'a'a'a'a'a'a'a'a'a'a'a'a'a'a'a'a'	Name     0       te

- 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	I	Change Password	Т	Logout
Single p	assenger	Multiple pas	<mark>sengers</mark> B	ulk transfer									
Perform	assessments	Approve appl	ications Allo	cate journeys	Issue tickets	Invoice passengers							
		_											
				735 new t	ickets have beer	n issued with serial numbers 655	to 1389.						
				Send th	em to be printed	and mark them as printed							
				Send th	on to be printed								
					[ details	з]ОК							

- 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] Pr	rocesses	People	le Oper	rations	Utilities	Admin		Welco	ome <mark>SYSADI</mark>	VIN I	Help	- I	Change Passwor	rd	Logout
Single passe	enger	Multiple	passenger	s B	Bulk transfer										
Perform asses	ssments	Approve	e applications	Alk	ocate journeys	Issue tickets	Inv	oice passengers	s						
Generate invoi	ces for pass	engers on r	route	route				Q <b>X</b> _	going to base	Select a	a base			QX	
and with journe	y entitlemen	nt S	Select Entitler	ment	•										
All invoices ger			ollowing detail	.s :											
Serial number	F	prefix													
Invoice issued	on [1	10/03/2017	7	and due	e for payment on	10/03/2017									
Covering perior	d from	dd/mm/yyy	yy	until	dd/mm/yyyy										
Reason for invo	oice -	Please se	elect		•		$\checkmark$	Address to car	er with financial	l responsib	ility				
Amount			(pounds)	or take	price from ticket p	rice if available									
Budget code	-	- Please se	elect - 💌												
													[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 151.

- 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.

[one]	Processes	People	Operations	Utilities	Admin	Welcome SYSADM	•	Help	Ι	Change Password	T	Logout
Single pa	assenger	Multiple passe	engers Bull	k transfer								
Move pa	assengers from	a to	route C	<b>ک</b> Incl	ude drivers and assistants 🖌	Include expi	ed jouri	neys 🗌			F	review

- 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			
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	ew		< prev   next >
			[cancel] Select

- 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 Ar	Clapham, Highbury Grove @ 08:00	Transfer but don't allocate to any step	
Ar Ar	Sharnbrook Upper School @ 08:25	Sharnbrook Upper School @ 08:25 🔹	
✓ B∈	Sharnbrook Upper School @ 15:30	Sharnbrook Upper School @ 15:30 🔹	
C:	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 *46* 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.

# **04** 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] P	rocesses <mark>People</mark> Operat	tions Ut	ilities Admin	N	/elcome <mark>\$Y\$ADMI</mark> h	I I	Help	1	Change Password	1	Logout
Personal in	fo Driver / assistant info	Communic	ations & complaints	5							
Search for	Active people in this authority	•	No person	selected							
Name	Any name characters										
Person Id											
Postcode	Type Any	Ŧ									
Base	Select a base	Q. <b>X</b>	Personal Co	ontact Education	Relationships	Status	Spec	ial need	ls Financial		
Gender	Either	•									
UPN											
Date of birth	dd/mm/yyyy										
NCY from	NCY TO NCY	•									
	Use contains matching for na	mes 🗌									
	[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 60.

- 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 the <u>One</u> <u>Publications</u> website.

## **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	
	[ cancel ] Create new person

- 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 *49*.
- 2. Ensure that the **Personal** tab is selected. Editable fields relating to the person's details are displayed.

A		Personal Contact Education Relationships Status Special needs Financial
A	Contraction of the local	Status Active  since dd/mm/yyyy because reason for inactivity
A		
A	and the second sec	Date of birth 13/09/2000 Age 14/00 Memo + Transport memo +
A		Date of birth 13/09/2000 Age 14/00 Memo + Transport memo +
A		Gender Female Title Select T
A		First name / (chosen first name)
AM	Contraction and Contraction	riist hame (chusen iiist hame)
A	and the second se	Middle name(s)
A		Sumame k (chosen sumame)
A	Contraction of the local division of the loc	
A		[ view name history ]
A	interim in the	
A		Ethnicity / religion / culture
A	and the second sec	> Languages
A		
A	CONTRACTOR OF THE OWNER.	> Deceased
A	and the second se	
A	CONTRACTOR OF THE OWNER.	> Student udfs
A	Contraction of the local division of the loc	> Person udfs
A	And the second sec	
A	and the second second	[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 *49*.
- 2. Ensure that the **Personal** tab is selected.
- 3. Select **Inactive** from the **Status** menu.

[one]	Processes	People	Operations	Utilities	Admin	N	/elcome <mark>SYSADW</mark>		Help		Change Password		Logout
Persona	al info Driver	r / assistant	info Comm	unications &	k complaints								
Search for	Active peop	ole in this auth	ority 👻				1.0	-					
	28-52	11	hide all ] Searcl			a second in	(no ema	il address)				[ac	tions <b>V</b> ]
1	Name	DOB	Postcode	[Pas	senger info   Person	al info   Driver / as	sistant info ]						
1				î =									
1	-				sonal Contact	Education	Relationships	Status		cial need			
1	-			St	atus	▼ since	dd/mm/yyyy	becaus	se rea	son for ir	nactivity 🔻		

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 *49*.
- 2. Select the **Contact** tab. Editable fields relating to the person's contact details are displayed.

[one] Processes Personal info Driv	People	Operations	Utilities Admin	Welcome SYSA	I I I	Help   Change	e Password   Logo
	ople in this autho		nications & complaints			-	
	clear   show all   I				mail address)		
Name	DOB	Postcode			mail address)		[ actions W
		1 ~		il info   Driver / assistant info ]			
and the second	0.8.2		Personal Contact	Education Relationships	Status	Special needs	Financial
			Primary		Mobile	number	
-	-		Landline	number	Q Business	number	
ine in			Email				
			Addressee				
100.00	-		Correspondence				٩
							[cancel] 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.

		1	Address history list for A			
From	Until 👙		Address	Туре	Correspondence	
		15		Bank		~
		14	a set of the later of	College		-
		22		Home Address	$\checkmark$	
		Bol	the second second second	Early Years		~
[ add address	from main catalo	gue   remove add	ress   see address details ]		Close	

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

From	Until	÷	Addres	s		Туре	Correspon	dence
		15	the second second			Bank		
		14	-	and the second		College		
		22	and the set of the	in and the second		Home Addres	is 🗹	
		Bo			-	Early Years		
add address	from main cat	talogue   remove add	dress hide address det	ails ]				Close
From dd	mm/yyyy	Jntil dd/mm/yyy	AddressType	H - Home Add	ress		Correspondence	$\checkmark$
Details	Map & Geol	Location						
Unique	to this add	iress						
Building nu	mber			UPRN				
Building na	ime			OSAPR				
Apartment				LA	Please se	elect		
Phone nun	nber							
							[ edit these det	ails J
Shared	with other	address						
Street nam	ie (1)			Street name (2)				
District/vills	-	Crownhill		Town/city	Miltor	Keynes		
		CIOWINI						
County				Country	UK-	Jnited Kingdom	1	
Postcode	1			USRN				
							[ edit these deta	ails ]

- 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 *49*.
- 2. Select the **Contact** tab. Editable fields relating to the person's contact details are displayed.

[one] Processes	People	Operations	Utilities Admin			Help	Change Password	I Logo
Personal info	)river / assistant ir	nfo Commu	inications & complaints					
Search for Active	people in this author	rity 👻			-			
	[ clear   show all   t	hide all ] Search			(no email addre	55)		[actions V
Name	DOB	Postcode						Lacono -
		- n,		onal info   Driver / assista	ant info ]			
STREET, STREET	10.000		·					
and the second se			Personal Conte	et Education	Relationships Stat	us Special ne	eds Financial	
			Primary		Mol	number		
And the local division of the local division	1000							
the state of the			Landline	number	Q Bus	iness number		
in the second second			Email					
All and the second s	and the second second		Addressee					
1		1.000	Correspondence			10.0		Q
No. of Concession, Name	10.000						[ cancel	1 Save
ANNIA ANNI	11/01/200						[ cancer	1 Jane

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

From	Until 🜩		Address	Туре	Correspondence
		15		Bank	
		14	the local states in the	College	
		22	States in the second second	Home Address	$\checkmark$
		Bol	and the second second second	Early Years	

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

Add ar	n address for	
Look for	r the address in the main catal	ogue
Postcode	Postcode	
Street address	Street address	
	[ c	lear ] 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.

	r the address in the main catalogue	Manufacture of			
Postcode	29				
Street address	Street address				
	[clear] Search				
Address 🕆		Details Map &	GeoLocation		
, в					
, B	^	Unique to this	address		
, В	And the second	Building number	1	UPRN	
B	in and the second s	Building name		OSAPR	
, B	And in the other states of the				
, 8		Apartment		LA	Please select
, B	the second second second	Phone number			
, B	the state of the late				[ edit these details ]
, 8		Shared with c	ther address		
0,					
1,		Street name (1)	finiting a	Street name (2)	
3,		District/village		Town/city	
4,	AND DESCRIPTION OF TAXABLE PARTY.	County		Country	Please select
5,					
6,	and the second second second second	Postcode		USRN	
7,	CALL IN COLUMN TWO IS NOT				[ edit these details ]
	the local data and the				
8,					
	COLUMN DESIGN AND DESI				
9,					
9, 0, <b>111</b>					
9, 0, , B					
9, D, , B					
9, 0, , B , B					
9, 0, , 8 , 8 , 8 , 8 , 8					
9, 0, , 8 , 8 , 8 , 8 , 8 , 8					
8, 9, 0, , 8 , 8 , 8 , 8 , 8 , 8 , 8 , 8					
9, 0, , 8 , 8 , 8 , 8 , 8 , 8					

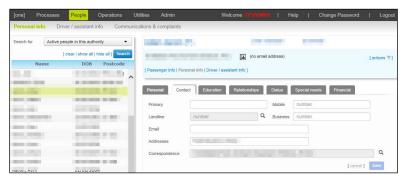
6. Highlight the address you want to add and then click the **Add this address** button to add the address and return to the **Address history list** dialog.

**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 132.

- 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 *49*.
- 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	the star when all the	College		
	22	And a second second second second	Home Address	$\checkmark$	
	Bol	the state being subscript	Early Years		~
[ add address	s from main catalogue   remov	e address   see address details ]		Close	

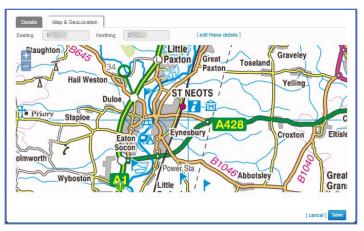
4. Highlight an address and then click the **see address details** hyperlink. Editable fields related to address details are displayed.

From	Until 🜩		Addres	s	Тур	pe Correspo	ondence
		15	State of the local division of the local div		Bank		]
		14		and the second	College		]
		22	1.0	in succession of the	Home A	ddress 💽	2
		Bo		-	Early Ye	ars	]
add address fr	om main catalogi	ue   remove address	hide address det	ails ]			Close
From dd/m	um/yyyy Until	dd/mm/yyyy	AddressType	H - Home Addre	155	Correspondenc	•
Details	Map & GeoLocat	ion					
	this addres						
Building num	nber inter			UPRN			
Building nam	ne			OSAPR			
Apartment				LA (	Please select		
Phone numb	er						
						[ edit these of	details ]
Shared w	ith other add	iress					
Street name	(1)			Street name (2)			
District/villag	e Crov	vnhill		Town/city	Milton Keynes		
County				Country	UK - United Kin	gdom	
Postcode				USRN			

5. Make the desired changes. For more information on editing addresses, see <u>Editing an Address</u> on page *134*.

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 49.
- 2. Select the **Contact** tab. Editable fields relating to the person's contact details are displayed.

[one] Processes	People Operations	Utilities Admin			Help I	Change Password	Logout
Personal info Driv	ver / assistant info Commi	unications & complaints					
Search for Active pe	ople in this authority •						
(	clear   show all   hide all ] Search		. 🔝 (no emai	address)			[actions ♥]
Name	DOB Postcode	[Passenger info   Personal inf	o   Driver / assistant info ]				
		Personal Contact	Education Relationships	Status	Special ne	eds Financial	
100 M	and the second s	Primary		Mobile	number		
-		Landline	nber Q	Business	number		
the second second		Email					
		Addressee					
100.00	a second state	Correspondence					Q
No. of Concession, Name	Contraction of the					[ cancel	] Save
Adivit, AVIII	11/01/2004					Lenneer	1 Banking

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

From	Until 🜩		Address	Туре	Correspondence
		15		Bank	
		14	an allow Solar Solars II II	College	
		22	and the second second second	Home Address	1
		Bol	a second second second second	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 *49*.
- 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		Welcome <b>SYS</b> A		Help		Change Password		Logout
Persona	l info Drive	er / assistant ir	nfo Commu	unications 8	& complaints								
Search for	Active peo	ople in this autho	ority 🔻	) 🖿	ni in a l								
	[0	lear   show all   h	hide all ] Search				(no	email address	)			fac	tions V]
	Name	DOB	Postcode	10-1	senger info   Perso		and inter 1						
		-		▲ [Pas	senger mio ( Perso	nai inio   Driver /	assistant inio j						
			The second	Pers	sonal Contact	Education	Relationship	s Status	Spec	ial nee	ds Financial		
in the second second		10.00		UPN			NCY 8	including o	offset of	D	Not following I		
				Local									
	1	Contraction of the local division of the loc		ULN									
		-	Concerne of	[ view	v information from A	dmissions modu	le] (Opens in a ne	w browser tab)					
				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

- Select a person. For more information on selecting a person, see <u>Selecting a Person</u> on page 49
- 2. Select the Education tab.
- 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.

[ add school to histo	<u>rv</u> ∣remov	e school from history ]				
School	Selec	t a base	Q <b>x *</b>	From	09/10/2014 *	Until dd/mm/yyyy
Joined because	Plea	ase select	•	5.0 🔻	days / week	
Left because	Plea	ase select	•			
Registration type	Plea	ase 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	elect			
Active	✓				
					[clear] Search
Base Na	ame 🔶	School Number	LEA	Ba	азе 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 ]				[ 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 *49*.
- 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.

#### Maintaining People

	05/06/2004 Z5 8DD	Personal Contact Education Relationships Status Special needs Financial
and the second second	03/07/2006	UPN NCY 4 including offset of 0 Not following NCY
	12/04/1961 Z7 3BD	Local UPN
and the second second	29/11/1982 Z7 1CC	
	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] Save
	08/12/1983 Z11 5AB	
	12/03/1997	
	06/04/1996 Z9 0DA	V School History
	16/04/1975 Z9 8AB	School Days / week From 🔶 Until
the second s	17/02/1999	Bishop's Waltham Junior School 5 01/09/2010
	31/08/2003 Z11 0BC	
and the second se	26/04/2000 Z7 5BD	
	30/06/2006	
	06/08/1997	[ add school to history   remove school from history ]
	04/05/1054 77 200	[ and series to makely   tender series many ]

- 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 *49*.
- 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.

	Name 💠		Gender	Relationship	Parental	Financial
add new care	r   remove selected car	er   view other	dependants of thi	s carer ]		
<u>add new care</u> Name		er   view other		s carer ] -Gender	•	

- 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		ple in this authorit		
Search for	Active peo	pie in this authorit	У	
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 contains r	matching for	names 🗌
		[ clear   sh	ow all   hide	all ] Search
	Name	DOE	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 50.

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

- 1. Select a person. For more information on selecting a person, see <u>Selecting a Person</u> on page *49*.
- 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	Wel	come SYSADW		Help		Change Passwo	rd	Logo
Personal	info Drive	r / assistant ir	nfo Comm	unications	& complaints								
Search for	Active peop	ple in this autho	ority 👻										
	[ cl	lear   show all   I	hide all ] Search			-	(no ema	I address	;)			[8	ctions W
-	Name	DOB	Postcode 3Q		ssenger info   Personal	info   Driver / assis	tant info ]						
-			LI LI		sonal Contact	Education	Relationships	Status		ecial nee	ds Financial	1	
,		1.1.1.1			Cared for by	Lucation	relationships	Status	John	scial fied			
		1			person is cared for by	the following peop	le :						
		COLUMN 1			Nar	me 🌲	Gende	r	Relatio	onship	Parental	Financ	ial
,			1.00				F	Mot	her		Y	N	
		-											
,				[ add	I new carer   remove se	elected carer   vier	w other dependant	of this c	arer ]				

- 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 49
- 2. Select the Status tab.

[one]	Processes	People	Operations	Utilities	Admin	Welcome 🌖		Help	Change Passwor	rd   Logout
Persona	Il info Driver	r / assistant i	nfo Commu	inications & c	omplaints					
Search for	Active peop	ole in this autho	ority 🔻				-			
		ear   show all			in the last		(no email address)	1		[actions 🔻]
	Name	DOB	Postcode	[Passe	nger info   Person	al info   Driver / assistant info ]				
				Persor	nal Contact	Education Relation	ships Status	Specia	I needs Financial	
	1	1.0				all 196	. A st			
					3	nicostentit care sudent care	citt server hashin seet			
-		-		Status(e				um status	*	
				Home L	A	ocal authority	•			
-				Funding		ocal authority	•			
100										[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 *49*.
- 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.

Ai	1000103-0-00						
Aa							
Aa	State of the local division of the local div	✓ Public care					
Aa	and the second sec	Cate	egory 💠	From	Until	Reaso	n ceased
Aa							
Aa	And the second second						
Aa	and the second second						
Aa	ALCOHOL: MARK						
Aa	100 million (100 million)	Ladd a new care or	der   remove selected	care order J			
Aa							
Aa	)	Category	category		•	*	
Aa		LA	local authority		•		
Aa		-		* Until	C	_	
Aa	3	From	dd/mm/yyyy	· Unui	dd/mm/yyyy	Cuml. days in last year	0 this year 0
Aa	THE REAL PROPERTY AND ADDRESS	Reason ceased	reason				•
Aa							[Cancel] Save
Aa	10. 10. <b>10.</b>						Control 1

- 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 *49*.
- 2. Select the **Status** tab.
- 3. Open the **Public care** section and highlight the care order you want to delete.

A		✓ Public care					
A		Cate	gory 💠	From	Until	Reason	ceased
A	and the second se	Full Care Order		20/10/2014			
	and the second sec						
-		[ add a new care on	der i remove selecti	ed care order 1			
	A REAL PROPERTY.	t dos a now care on	ade l'remove selecte	a care order 1			
			(	2121			
		Category	FC - Full Care	Order	•	*	
and Contains	Contraction and Contraction	LA	local authority		•		
		From	20/10/2014	* Until		Cuml. days in last year	0 this year 316
	The second s	Reason ceased	reason				-
	Contraction of the second						[Cancel] Save
	and the second se	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 *49*.
- 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.

#### Maintaining People

Ai		> Public care	e				
A:		✓ Court orde	rs				
Ai		1	Гуре 🛊	From	Until	Dependant	Carer
A							
A							
Ai	-						
Ai		[ add a new court o	order   remove selected	i court order ]			
A	10000000000000						
A		Туре	type		-	*	
A		From	dd/mm/yyyy	* Until	dd/mm/yyyy		
A	and the local division of the local division	-			Q.X.*		Q.X.*
Ai		Dependant	Select a persor	1	~~*	Carer	4**
A	A DESCRIPTION OF THE OWNER	>Udfs					
Ai							
A	~ ~						[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 💠	Gende	Relationship	Parental	Financial	
N	F	Aunt	Y	Y	
	F	Mother	Y	N	
l.	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 c	arer		
Nan	ne 🔶	Gender	Relationship	Parental	Financial
3			Self	Ν	Ν
				[cancel][Search a	II people ] Select

- 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 *49*.
- 2. Select the Status tab.
- 3. Open the **Court orders** section and highlight the court order you want to delete.

A A		<ul> <li>Public care</li> <li>Court orde</li> </ul>					
A	Contraction of Contract	т	ype 🌲	From	Until	Dependant	Carer
A	1000	Education Super	vision Order	08/10/2014		Management	Α
A	the second se						
A							
A	100000	add a new court c	order   remove sele	cted court order ]			
A							
A	Contraction of the local division of the loc						[actions W]
A	from the set of a set of	Туре	ESO - Educa	tion Supervision Order	•	*	
A	and the second se	From	08/10/2014	* Until			
A		FIOIT	06/10/2014	+ Onlar			
A	A CONTRACTOR OF THE OWNER OWNER OF THE OWNER	Dependant	M		Q X *	Carer A	Q.X.*
A	~	>Udfs					
A	~	2 Ours					
View 1 - 100 of 190,552	< prev   next >						[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 *49.*
- 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	DOB 12	ID 9070	0576	
	[ clear   show all   hide all ] Search	8	(no email addre	ess)		[actions ▼]
Name	DOB Postcode					
Aa		[Passenger info   Personal info	Driver / assistant info ]			
Aa						
Aa		Personal Contact E	ducation Relationships Sta	tus Special needs	Financial	
Ai	1000 March 1000	[ view information from SEN mod	dule ] (Opens in a new browser tab)			
Aa	and the second se	<ul> <li>Special transport need</li> </ul>	eds (1 current)			
Aa			(,			
Aa	and the second se	Need	Responsible person	Add seats	From	Until
Ai		MTA - Must Travel Alone		0	06/10/2014	31/10/2014
Aa		[ add new need   delete selec	ted need ]			
Aa		Need	Select Need -	* Additional	seats 0 🕶	Memo +
Aa	No. 10. 10. 10.					
Aa	and the second sec	Comments				
Ai	ALCOHOLD BE AND A REAL	Responsible person	Select a person			Q. <b>X</b>
Aa	and the second se	From	dd/mm/yyyy Until c	dd/mm/yyyy		
Aa	and the second se		udmining yyy	Juninityyyy		
Aa	CONTRACTOR OF A DESCRIPTION OF A DESCRIP	> Udf				
Aa	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1				[	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 *153*.

- 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 *49*.
- 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]	Processes	People	Operations	Utilities /	dmin	Welcome SYSAD	MIN I	Help   I	Change Password	d   Logou
Personal i	info Driver	/ assistant i	nfo Commu	unications & co	mplaints					
Search for	Active people	e in this autho	ority 👻							
Name	bob				-	. 🔝 (no er	mail address)	)		[actions 🔻]
	53	ar   show all   I	-	[ Passeng	er info   Personal	info   Driver / assistant info ]				
B	Name	DOB	Postcode	_			_		_	
в			1			Education Relationships	Status	Special need	s Financial	
B						N module ] (Opens in a new browse t needs (1 current)	r tab)			
B			-	Need		Responsible I	person	Add seats	From	Until
B		-			- Harness			0		
B				[ add r	ew need   delete	selected need ]				
B										[actions ¥]
B				Need		HARN - Hamess	• *	Addition	al seats 0 💌	Memo +
B		Distant states		Comm	ents					
B				Respo	nsible person	Select a person				Q.X
B				From		dd/mm/yyyy Until	dd/n	nm/yyyy		Cancel ] Save

- 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 *49*.
- 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			Help	I I	Change Password		Logout
Personal in	nfo Driver	/ assistant i	nfo Comm	unications 8	complaints								
Search for	Active people	e in this autho	ority 👻										
Name	bob				ali na latara		(no email ad	dress)				[ac	tions <b>V</b> ]
	- 35		hide all ] Search	[Past	senger info   Personal	info   Driver / assistant info	0]						
N	lame	DOB	Postcode	_									
B		-		Pers	sonal Contact	Education Relati	onships S	tatus	Spec	ial need	s Financial		
в				[ view	r information from SEN	N module ] (Opens in a new	w browser tab)						
B		-		<b>√</b> S	pecial transport	t needs (1 current)							
В				N	eed	Respo	nsible perso	n	Add	d seats	From	Unt	il
B	í	Contraction in con-		н	ARN - Harness					0			
B					dd new need   delete	selected 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.

Personal in		ications & complaints			
Search for	Active people in this authority	C (M)	DOB 01/01/2010	ID 8895236	
Name	das		(no email address)		[ actions ]
erson Id	8895236				[ denona   4 ]
	[ clear   show all   hide all ] Search	[ Passenger info   Personal info   Driver / assiste	ant info ]		
1	Name DOB Postcode	Personal Contact Education	Relationships Status Spe	cial needs Financial	
E)anira 🗖	01/01/2010	[ view information from SEN module ] (Opens in	a new broweer tab)		
		[view mornauon nom SEN module ] (opens in	a new browser tab)		
		> Special transport needs (0 curre			
		<ul> <li>Special transport needs (0 curre</li> <li>SEN stage history</li> </ul>	ent)	Start date *	End date
		> Special transport needs (0 curre			End date
		Special transport needs (0 currer     SEN stage history     Stage	ent) Source	Start date = 11/11/2015 18/12/2013	End date
		Special transport needs (0 curred SEN stage history Stage Education Health and Care Plan	Source CCS	11/11/2015	End date
		Special transport needs (0 curred SEN stage history     Stage     Education Health and Care Plan     School Action	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 *49*.
- 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.

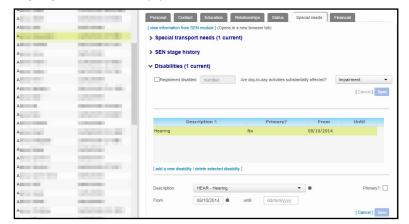
A						
100 000		Personal Con			cial needs Finar	ncial
	and the second second	[ view information fro	m SEN module ] (Opens in a	a new browser tab)		
	Street Man and and	> Special tran	sport needs (1 currer	nt)		
Aa	and the second second					
A.1		> SEN stage h	istory			
Ar an	THE REAL PROPERTY AND ADDRESS OF	✓ Disabilities (	0 current)			
Aa						
A	and the second sec	Registered dis	abled number	Are day-to-day activities substantia	ally affected?	pairment
Aa	the second second					[ Car
Aa						
Aa	NAMES AND ADDRESS.					
Ai	the second s					
A.	and the second sec		Description	Primary?	From 🔤	Until
A4						
Aa	ACCOUNTS OF MALE					
Ai	and the second se					
Az	NUMBER OF COLUMN					
44	and the second second	[ add a new disab	ility   delete selected disabili	N I		
A:	100 C					
Aa	and the second se	Description	( description	•		F
4.	and the second s	Description	description		*	
4.	and the second second	From	dd/mm/yyyy 🕷	until dd/mm/yyyy		
Aa						[ Car
Ai	and the second se					1 out

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 *49*.
- 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 *49*.
- 2. Select the **Special needs** tab and open the **Disabilities** section. A list of the person's disabilities is displayed.

A		Personal Contact Ed	ucation Relationshi	ps Status S	pecial needs	Financial
A	the second se	[ view information from SEN modu	le] (Opens in a new brow	vser tab)		
A		> Special transport need	ds (1 current)			
A						
A	100 C	SEN stage history				
A	and the second se	✓ Disabilities (1 current)	1			
A		• Disabilities (Tourient,				
A		Registered disabled nu	mber Are day	to-day activities substan	tially affected?	Impairment <b>•</b>
A	the second for the later					[Cancel] Save
A						
A	Contraction of the local division of the loc					
A			*#14-10			
A		Descriptio	n \$	Primary?	From	Until
A	10	Hearing	No		08/10/2014	
A						
A						
A						
A	Contraction of the local	[ add a new disability   delete s	elected disability ]			

- 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 *49*.
- 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
A	[ 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 *49*.
- 2. Select the Financial tab.

[one]	Processes	People	Operations	Utilities	Admin	Welco		Help	Change Password	I I Logout
Persona	<b>Linfo</b> Driv	ver / assistant	info Comm	unications &	& complaints					
Search for	Active pe	cople in this aut	nority 🔻	1			10.000			
Name	bob			7	-	p	(no email address	:)		[actions V]
[clear   show all   hide all ] Search				[Pas	senger info   Person	al info   Driver / assista	nt info ]			
	Name	DOB	Postcode							
				▲ Pen	sonal Contact	Education	Relationships Status	Special n	eeds Financial	
1.0		10.00	1000	٧L	ow Income Fai					[actions ¥]
		A REAL PROPERTY OF		Ch	ecked From	Recorded event n Until	s Status		Resulting effectiv	ve LIF status Until
								, r		
in its		-								
100 A 100										
				fadd	new LIF   edit   dele	te ]				
		C Assessed in the			new car foot foot					

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 *49*.
- 2. Select the Financial tab.
- 3. Open the Low Income Family section and highlight the LIF event that you want to delete.

Search for Active	people in this authority	A DOB 12	ID 9070576
	[ clear   show all   hide all ] Search	8 (no email addr	ess) [actions ♥]
Name	DOB Postcode	[Passenger info   Personal info   Driver / assistant info ]	
Allin i	~	[Passenger into   Personal into   Driver / assistant into ]	
A	Contraction of the last	Personal Contact Education Relationships Sta	us Special needs Financial
A		✓ Low Income Family	[actions ¥]
A	Contraction of the local division of the loc	Recorded events	Resulting effective LIF status
A	Contraction of the local sectors of the	Checked From Until Status	From 🗘 Until
A	100 million (100 m	10/10/2014 22/10/2014 Recorded LIF	10/10/2014 22/10/2014
A	Contraction of the local division of the loc		
A			
A	Contraction of the local distance of the loc		
A	and the second		
A	10000000		
A	a state of the		
A	Construction of the local division of the lo		
A			
	the second se	[ add new LIF   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 People	Operations L	Itilities Admin	Welcome eye	admin	Help	Change Password	Logout
Personal inf	o Driver / assistant	info Commun	ications & complaints					
Search for	People	•	No person selecte	ed				
Name	Any name characters							
Contractor		Q. <b>X</b>						
Person Id								
Postcode	Туре	Any 👻	Role details Checks	Training Bases	Routes			
Base	Select a base	Q. <b>X</b>						
Date of birth	dd/mm/yyyy							
Gender	Either	•						
	Use contains match	ning for names						
		[ clear ] 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.

#### Maintaining People

	/er / assistant inf	o Communi	cations & complaint					
Search for Drivers		•	🕈 D		DOB 2 1		ID	
Role Status Active		•	High Street, Financia		test@madeupperson.com	0		[ actions V]
	[ clear   show all   hid	le all ] Search	[ Passanger info ] [	Poreonal	info   Driver / assistant info ]			
Name	DOB	PostCode	[ Fassenger Inio ] P	ersonar				
-		M W	Role details	Checks	Training Bases Routes			
inter term	0	M J	Role type		ver 👻			[actions V]
	•		Badge number		/LA12			Memo +
	0	A	Licenced		PSV - PSV Licence			
	1997 B	1 M U						
		4 M R	Checked	$\checkmark$	V - Vetted			
and the second	01/		Status type	CC	E - County Council Employee 🔻			
	01/	5 M	Role ends on	dd	/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 the <u>One</u> <u>Publications</u> website.

# **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 *50*.
- 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 69.
- Ensure that the Role details tab is selected. Editable fields related to the driver/assistant's role are displayed.

A		Role type	Se	lect role type	•		[actions W]
A	and the second se	Badge number					Memo 🕂
A	10 million 10	Licenced		Licence type	*		
A	A REAL PROPERTY.	Checked		Check type	w		
A	a second s	Status type	Se	lect status type	•		
A	10.00	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	Hu	4	$\checkmark$
Arrow Travel	Jo	8	
asa	as		✓
Auckland Taxis	Jo	8	$\checkmark$
Bailey Travel	Ch	9	✓
Barton Private Hire	Jo	0	
Bernie's Taxis	Be	2	<ul> <li>✓</li> </ul>
Showing 1 - 71 of 71	1.	<pre>&lt; prev</pre>	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.
- 7. 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 69.
- 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 51.

# **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 69.
- 2. Select the Checks tab.
- 3. Click the **add new check** hyperlink. Editable fields relating to check details are displayed.

#### Maintaining People

earch for Drivers		•	🔹 K		DOB	ID :		
ole Status Active		-						
			11.4	R 🔝 Test1	11@test.com			[ actions ]
Name	[ clear   show all   hic DOB	PostCode	[Passenger info   Personal info	Driver / assistant info ]				
Name	DOB	M W						
the local	0	MJ	Role details Checks	Training Bases I	Routes			
and the second	0	M (	Application reference	Application date	Clearance	type D	ecision	Decision date
-								
	0	M						
		1 M U						
		4 M R 5 M						
in him	0.	M	[ add new check   delete select	ed check ]				
100	0	5 M J	A					
			Application reference					
			Clearance type requested	Select clearance type	- *	on	dd/mm/yyyy	*
			Disclosure reference			Destroy on	dd/mm/yyyy	
			Checked on	dd/mm/yyyy				
			Decision	Select decision	•	on	dd/mm/yyyy	*
			Countersignatory	Select Countersignatory	-	Reference		
				Select Countersignatory				
			Invoice number			Amount		
			Invoice point type	Base	•			
			Invoice point type					
			Invoice point		QX			
					Q. <b>X</b>			Memo +
					Q.¥			Memo +

- 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 69.
- 2. Select the Checks tab.
- 3. Highlight the check you want to delete.

[one] Pr	ocesses <mark>P</mark>	People Or	perations U	tilities Admin	Welcome sysad	<b>nin   Help</b>	Change Pass	sword   Logout
Personal info	Driver /	assistant info	o Communi	cations & complaints				
Search for	Drivers		•	÷ Dame -		OOB	ID 8	
Role Status	Active			High Street,	test@i	nadeupperson.com		[actions V]
	-	ar   show all   hide		[ Passenger info   Personal info	Driver / assistant info ]			
N	ame	DOB	PostCode					
A			M	Role details Checks	Training Bases R	outes		
Al		0	M			cl i		
A		0	M	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	L M J					
P		2· 4	A M					
Ri	R 0 5 M			add new check   delete select	ed check ]			
Ri	÷		M					

- 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 69.
- 2. Select the **Training** tab.
- 3. Click the **add new course** hyperlink. Editable fields related to course details are displayed.

A.	and a second sec	Role details	Checks Training	Bases Routes		
A	. SAB	Cour	se description	Completion date	Qualification obtained	Data source
A	and the second sec					
A	8AB					
Ai						
A						
A						
Ai		[ add new course	delete selected course ]			
A	and the second se					
A;						
A		Description			*	
Ai		Completed on	dd/mm/yyyy 🕷 D	uration (days)		
A		Qualification	Select qualification		•	
Ai		Guanneadori				
A;		Level	Select level		-	
Ai	and the local division of the local division	Cost	F	und		
Ai						
A	THE OWNER OF	Renewal due	dd/mm/yyyy			
Ai						Memo 🕂
A						[cancel]
0.						2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2

- 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 69.
- 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 / assista	nt info 1		
A	^				
A	1.00	Role details Checks Training	Bases Routes		
A	The second second	Course description	Completion date	Qualification obtained	Data source
A		Test	10/10/2014		
A					
A	and the second se				
A	Concerned and				
A	and the second sec				
A	1000.000	[ 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 69.
- 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.

	Choose a base								
Looking for									
LEA	All	All							
Туре	Туре								
Control	Please s	select							
Active	<ul> <li>Image: A start of the start of</li></ul>								
					[clear] Search				
Base N	ame 🔶	School Number	LEA	Base	туре				
Abbey Middle S	chool	4001	999	JUN					
Westfield Middl	e 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.
- 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 69.
- 2. Select the **Bases** tab.

Role details Checks Training Bases Routes		
Base Name	School Numbe	I LEA
ACS Cobham International School	6529	936
[ add new base for this driver / assistant   remove selected base from the lis	t ]	

- 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 69.
- 2. Select the **Routes** tab. A list of all the routes that the selected driver/assistant works is displayed.

					laints								
Search for	Drivers •			\$ D	DOB ID								
Role Status	Active		•	High Street,	and the second		🔳 t	est@madeu	pperson.co	m			[ actions 🖤
	[clear]	show all   hide	all ] Search	[ Passenger in	fo   Personal info	Driver / assi	stant info 1						
N	ame	DOB	PostCode	[ i doveriger in		- Dirici / dooi	ottant into j						
A			M W	Role details	Checks	Training	Bases	Routes	٦				
A		0	M			in an ing			·				
A	-	0	M Y	between 2	20/10/2017	and	dd/mm/y	ууу					[ actions 🔻
D				Route			Desc	ription				From	Until
G		0	M	BDCC01	Bedford Da	y Care Centr	e - Route (	01					
H		2 1	M U	ABB001	Abbey Mide	le School							
P		2. 4	M										

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**

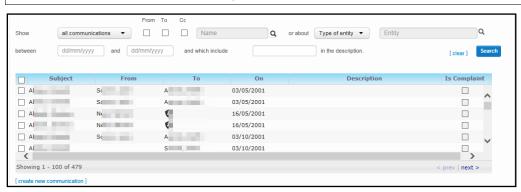
1. Select the **People** area and select the **Communications & complaints** page. Editable fields relating to communication details are displayed.

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



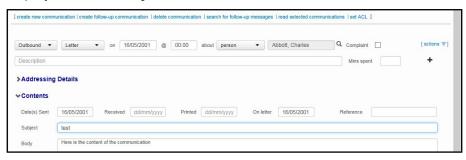
8. Highlight a communication to select it.

**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.

Transport - Communicati × 🕒 https://				
← → C		23	🌆 🤷	≡
	Conversation			
Inbound email on 05 August 2014 @ 04.41 about person Csubject, Csubject From Ctrom, ctrom To Cto, cto Cc Description parent log Subject fest Body Here is the content of the communication Complaint Yes				

## 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 76.
- 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.
- Click the create new communication hyperlink. Editable fields relating to communication details are displayed.

			n To Cc						-
how	all communicati	ions 🔻		Name	Q or ab	out Type of entity •	Entity		٦,
etween	dd/mm/yyyy	and (dd/mm/)	vyyy and v	which include		in the description.		[clear]	Searc
	Subject	From	T	0	On	Descrip	tion	Is Complain	ıt
7									~
A		(	Az		05/2001				
A		(	Aa		5/2001				
		•	0		05/2001				
A			¢		05/2001				~
A (	S	¢	Αε,	03/1	.0/2001				
Inbound Description	All	on dd/m	im/yyyy @	15:36 about	Type of entity •	Entity	Q Complaint		+
	From				То		Cc		
[ add me > Content > Respon: > UDFs	s	contractor   remove	] [a	dd me   add perso	n   add contractor   re	move ] [add m	ne   add person   add ci	ontractor   remove	1
							nis communication as an e		ave

- 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 **AII**, **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 co	ntractor   remove ] [ add me	add person   add contractor   remove	1	[ 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:

✓ <u>Response</u>						
Referred to or response required from	Select a person	<b>QX</b>	by	dd/mm/yyyy	Completed on	dd/mm/yyyy

- 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 wit	th outcome	Please sele	st	
Appealed to law on	dd/mm/yyyy wit	th outcome	Please sele	•t	
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 76.
- 2. Click the create follow-up communication hyperlink.

how	all communi	ications -		Name		Q or about	Type of entity •	Entity		Q
etween	dd/mm/yyyy	/ and	dd/mm/yyyy	and which include			in the description.		[clear]	Searc
	Subject	Fr	om	То	On		Descripti	on	Is Complai	int
🖌 At		Sime m	Az		03/05/2001					î
At	1000	S	SA		03/05/2001					
At		N	9		16/05/2001					
At		N	0	I.	16/05/2001					~
At	10.00	S	Ač		03/10/2001					
Showing 1 -									>	

3. Enter the details of the follow-up communication. For more information on creating communications, see <u>Recording a Communication</u> on page 78.

## 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 76.
- 2. Click the **search for follow-up messages** hyperlink. A list of the selected communication's follow-up messages is displayed.

t From	То	On	Description	Is Complaint
S	Ai	03/05/2001		
S	Aa	03/05/2001		
N	C	16/05/2001		
N	0	16/05/2001		
S	Aa	03/10/2001		
	S S N	S Ar	S         Ai         03/05/2001           S         Ai         03/05/2001           N         Image: Control of the second seco	S         Az         03/05/2001           S         Az         03/05/2001           N         Image: Constraint of the second s

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 76.
- 2. Click the **delete communication** hyperlink. A confirmation dialog is displayed.

Q [clear] Searc
[clear] Searc
s Complaint
`

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 76.
- 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 >
No records to view [ add user/group   remove user/group ]	For users in more than one group	< prev   next > "Allow" takes priority •
	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		
Comment				
	Name of user or gro	up /	Access rights gra	nted
No records to	) view		<	prev   next >
add user/grou	up   remove user/group ]	For users in more than one grou	"Allow" ta	kes priority 🔻
			1	
User /group nar	me			Search

- 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 76.
- 2. Click the Set ACL hyperlink to display the Access Control List dialog.
- 3. Highlight the user/group you want to edit.

Comment		
Name of user of	r group 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
	] For users in more than one group deny any access	

- 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 76.
- 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.

# **05** 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 B	ulk 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	-	
	[c	ear ] 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 the <u>One</u> <u>Publications</u> website.

## **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		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 🔻	
54	[clear] Search	Description	Enter description	*
Description	Туре	Stop Address		Q <b>X</b>
1:	^	Start date	dd/mm/yyyy	
10	and the second	End date	dd/mm/yyyy	
3:	ALCOHOLD STORE		[ canc	el] 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	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	And the second	Start date	dd/mm/yyyy	
3		End date	dd/mm/yyyy	
4 A				[cancel] Save

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

Stop type	All	Details Boa	rding & 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		Q <b>X</b>
1	^	Base	Select a base	Q.¥.*
1	ALC: NOT THE REAL PROPERTY OF	Site	Nothing selected	*
3		Start date	dd/mm/yyyy	
4 A		End date	dd/mm/yyyy	
A	ter ter internet			[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:	^	Student		* Q X
1		Home address		Q
3	and soldier of the second	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 Boar	rding & alighting Routes Map	
Route type	IIA	Stop type	Client/person 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		Client/Person		* Q <b>X</b>
1		Home address		Q
3	the second second	Start date	dd/mm/yyyy	
4: A		End date	dd/mm/yyyy	
A	and the second second			[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 <u>Selecting a Stop</u> on page 83.
- 2. Ensure that the **Details** tab is selected. Editable fields related to the stop are displayed.

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] Sea	rch	Description	Abbey Middle School	*
Description		Туре	1	Stop Address		Q. #
1		Address	~	otop Address		
1		Address		Start date	dd/mm/yyyy	
1	and the second	Address		End date	dd/mm/yyyy	
3	the second second	Address				[cancel] Save

- 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 *83*.
- 2. Click the **delete stop** hyperlink. A confirmation dialog is displayed.

Stop type	All	•	Details Boar	ding & 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		s 🔨	Start date	dd/mm/yyyy	
1		S	End date	dd/mm/yyyy	
3		s			[cancel] Save
4:		s			[cancer]
A		e			
A		- I			
A					
A		-			
A		100			
A	-	100			
A		s			
A		e			
A		s			
A		s			
В	-	-			
В		No.			
B		~			
Showing 1 - 100 o		< prev   next >			
[ create new stop ]		a prov j next a			

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 95.

## 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 83.
- Select the Boarding & alighting tab. A list of the passengers who board or alight at the stop is displayed.

[one]	Processes	People	Operations	Utilities A	dmin	Wel	come <mark>\$</mark>	Y SADWIN	Help	L	Change F	assword	- L	Logout
Stops	Routes	Contractors	Contracts	Bulk contract	renewal									
Description	n			Abbey	Middle School									
Address													[ act	ions 🛡 ]
Route	ro	ute	Q. <b>X</b>											
Stop type	A	l.	•	Details	Boarding & alighting	Rout	les	Мар						
Route type	A	I	•	Show only	Passenger name	е	or	Current		•		[show all]	Refr	sh
Area	A	I	•	Name 💠		Туре	Route		Fro	m	Until	Board,	Alight	
Dates	C	urrent	•			S	SYS-R2	- System Arc	- Tes 02/07/	2014		В		
			[clear] Search	-		S	SYS-R2	- System Arc	- Tes 02/07/	2014		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 Selecting a Stop on page 83.
- 2. Select the **Routes** tab. A list of the routes that the selected stop is included in is displayed.

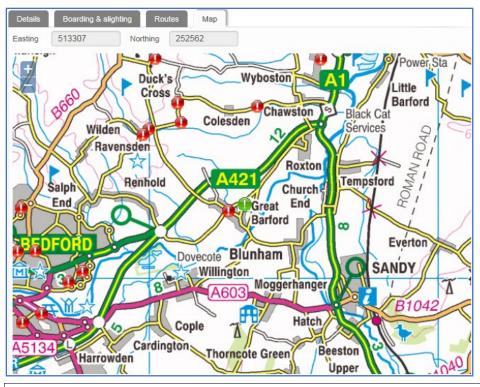
[one]	Processes	People	Operations	Utilities	Admin	Welcome		Help	Chang	e Password	Logout
Stops	Routes	Contractors	Contracts	Bulk contr	act renewal						
Description				Abb	ey Middle Scho	lool					
Address				)							[actions V]
Route	ro	ute	Q×								
Stop type	AI	l	•	Detail	s Boarding & aligh	ting Routes	Мар				
Route type	AI	Ļ	•	Show o	Route code o	or description	Step dates	Current	•	[show all]	Refresh
Area	Al	l	•	Cod	e 💠 Description		Туре Оре	rational Area	Vehicle		
Dates	Cu	urrent	•	00000	2 Brickhill to Gran	ge School (Tail-Lif	ts		TL4 - Tail-Li	ft Minibus (4 se	eater)
				CHERY	L Test		S				
			[clear] Search	EXTRA	1 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 *83*.
- 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	We	elcome 🍯			Help		Change Password	Logout
Stops	Routes	Contractors	Contracts	Bulk con	tract renewal								
Code													
Description													
Base	Schools	5	Q. <b>X</b>	Deta	ails Stops I	.oading Pa	ssengers	Drivers 8	assista	ints	Surve	eys Map	
Туре	All type:	8	•										
Area	All		Ŧ										
Dates	Current		•										
			[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 the <u>One</u> <u>Publications</u> website.

## **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								
Base	Schools	Q. <b>X</b>	Details Stops	Loading Pass	sengers Driv	ers & assistants	Surveys Map	
Туре	All types	•	Code		*	Start date	dd/mm/yyyy	
Area	All	-	Description		*	End date	dd/mm/yyyy	
Dates	Current	•	Route type	Standard	-	Passengers	0	
		[clear] Search	Operational area	Select Operationa	al Area 🔻	Journeys	2	
Code	Description	Area	Frequency			Distance	0.000	
1	BR-Route1			MTWTF	SS			
10	BR-Route10 - DTD					Memo 🕈	Additional Memo	
11	BR-Route11 -NW		Company name		Q.X [	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		2 Contracts					
5	Br-Route5	LBUZ						
56566	hjhk		> Vehicles					
567	test							
6	BR-Route6							
7	BR-Route7							
8	BR-Route8							
9	BR-Route9							
ARCRT1	ARCDEL Route1							
BDCC01	Bedford Day Care Cent	re - 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	1					
Showing 1 -	86 of 86	<pre>c prev   next &gt;</pre>						

- 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.

	Active		
		[Clear Search	] Search
Company Name	Contact	Telephone	Active
A1 Cars	Ma	0	<b>V</b>
ani10	te		
ani131	ar		✓
Archer Carrs	Hu	4	$\checkmark$
Arrow Travel	Jo	8	$\checkmark$
asa	as		$\checkmark$
Auckland Taxis	Jo	8	✓
Bailey Travel	Ch	9	$\checkmark$
Barton Private Hire	Jo	0	$\checkmark$
Bernie's Taxis	Be	2	
Showing 1 - 71 of 71		<pre>&lt; pre</pre>	v   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 *117*.
- 11. If required, add vehicle details. For more information, see <u>Adding a Vehicle to a Route</u> on page 93.
- 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 90.
- 2. Ensure that the **Details** tab is selected. Editable fields related to the route's details are displayed.

[one]	Processes People	Operations	Utilities	Admin	N	/elcome SY:	<b>ADMIN</b>	I   Help	Change Passwor	d   Logout
Stops	Routes Contractors	Contracts	Bulk co	ontract renewal						
Code			R	AIL1 - Virgir	Railways					
Description	1									
Base	Schools	Q	K	etails Stops	Loading P	assengers	Drivers	s & 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] Searc	ah I	Route type	Network		•	Passengers	1	
Code	Description	Area		Operational area	Select Operati	onal Area	•	Journeys	2	
N_01	TR-N/W Route1	BED	~	Frequency		S S				
N001	T123							Memo 🕂	Additional Memo 🕂	
new route	new routes	BED								
NEW012	Newland Primary Schoo	l.								[cancel] Save
RAIL1	Virgin Railways									[cancer] save
RISK	Risk Assessment		>	Contracts						
SAMP	samp									
SHAR1	Clapham, Milton Ernest		>	Vehicles						

- 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 t	o door-to-
door routes. If required, contact the One Application Support Desk to request the script, referen	ncing 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 90.
- 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 117.

#### Adding a Vehicle to a Route

- 1. Select a route. For more information on selecting routes, see <u>Selecting a Route</u> on page 90.
- 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-Contracto	r1-Plsdn't use	Q X Reg	Type Select from
ARCRT1	ARCDEL Route1		Description				
BDCC01	Bedford Day Care Centre -	Rc BED	Description				
BR_BT1	BR-BT1	BED	Capacities	(seated)	(standing)	(wheelchairs)	(max with max wheelchairs)
BR-123	BR-123	LUD					[ Can

- 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.

	Select Contract	or	
	Active		
		[Clear Search]	Search
Company Name	Contact	Telephone	Active
A1 Cars	Ma	0	<b>V</b>
ani10	te		<b>V</b>
ani131	an		<b>V</b>
Archer Carrs	Hur	4	<b>V</b>
Arrow Travel	Jo	8	<b>V</b>
asa	as		<b>V</b>
Auckland Taxis	Jo	8	<b>V</b>
Bailey Travel	Ch	9	<b>V</b>
Barton Private Hire	Jo	0	<b>V</b>
Bernie's Taxis	Be	2	× 、
Showing 1 - 71 of 71		<pre>&gt; </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 110.

- 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 90.
- 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.

	to be a second of the						
	Company in the line of	BED	✓ Vehicles				
		BED	From	Until	Registration	Type / Description	Contractor
	and the second se				Registration		
0			03/11/2014	03/11/2014		Double Decker (80 seater)	Arrow Travel
1	1.000						
012							
т	Contraction of the local sectors						
L1							
			[ add vehicle   re	move vehicle ]			

- 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 87.

#### **Adding Stops to a Route**

- 1. Select a route. For more information on selecting routes, see <u>Selecting a Route</u> on page 90.
- 2. Select the **Stops** tab to view a list of the stops on that route.

npuon					Deta	ails Sto		ading Passengers Drivers & assistants	Surveys Map
se	Schools		Q	×	Deta	1113 310		Step active between	10/10/2014 and
ре	All types		•						
						Step 🜲	Time	Description	Valid from
rea	All		•			1	07:50	Clapham, High Street Shops	01/09/1992
ates	Current		-	- I		2	07:55	Clapham, RAE Club	01/09/1992
		f alare 1	Searc			3	08:05	Milton Ernest, The Queens Head	01/09/1992
		[clear]	-			4	08:08	Milton Ernest, Garage	01/09/1992
ode	Description	Ar	rea			5	08:25	Sharnbrook Upper School	01/09/1992
E				^		6	15:30	Sharnbrook Upper School	01/09/1992
EE7	and the second	BE	ED			7	15:47	Milton Ernest, Garage	01/09/1992
_01		BE	ED			8	15:50	Milton Ernest, The Queens Head	01/09/1992
001						9	16:00	Clapham, RAE Club	01/09/1992
ew route						10	16:05	Clapham, High Street Shops	01/09/1992
EW012									

**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.

#### Maintaining Routes and Stops

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

- 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 90.
- 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	tails S	tops	ading Passengers Drivers & assistants	Surveys Map	
Base	Schools	Q	×						
Туре	All types						Step active between	10/10/2014 and	dd/mm/yyyy
Type	All types				Step 💠	Time	Description	Valid from	Valid to
Area	All	•	<u> </u>		1	07:50	Clapham, High Street Shops	01/09/1992	
Dates	Current	•	-		þ	07:55	Clapham, RAE Club	01/09/1992	
	[ cle	ar 1 Searc	:h		3	08:05	Milton Ernest, The Queens Head	01/09/1992	
Code	-				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	

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 St	tops Lo:	ading Passengers Drivers & assistant	s Surveys Map
Base	Schools	Q	×				Step active between	10/10/2014 and dd/mm/yyyy
Туре	All types	•	-					
Area	All		5		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
	1	lear ] Searc	ch		3	07:55	Clapham, RAE Club	01/09/1992
Code	Description	Area			4	08:08	Milton Ernest, Garage	01/09/1992
Code	Description	Ared			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

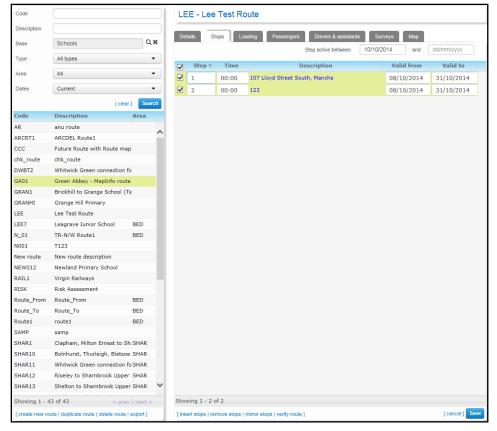
- 5. If required, repeat step three for all the stops you want to re-order.
- 6. Click the **Save** button to save your changes.

#### Mirroring the Stops on a Route

- 1. Select a route. For more information on selecting routes, see <u>Selecting a Route</u> on page 90.
- 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.



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 - Lee	Test Ro	oute		
Description Base	Schools	Q <b>X</b>	Det	ails Sto	ps Lo		Surveys Map	dd/mm/yyyy
Туре	All types	•		Step 🔶	Time	Description	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
		[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 90.
- 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.

Code			R	ΔΙΙ 1	Virgin	Railways		
Description					- virgin	r canways		
			De	etails	Stops	Loading Passengers Drivers & assistan	ts Surveys Map	
Base	Schools	Q <b>X</b>				Step active between	13/03/2017 and	dd/mm/yyyy
Туре	All types	•					Valid from	
Area	All	•		Step 1	Time	Description Midland Road, Bedford, MK40 1PL	Valid from	Valid to
Dates	Current	•		2		Railway Station, Bedford, MK44 3SG		
Dates	Current	·		3		Clapham Junction		
	[clear] S	earch		4		Crystal Palace		
Code	Description Area			5	-	Harlington		
N_01	TR-N/W Route1 BED	~		6		Hemel Hempstead		
N001	T123			7		Hendon		
new route	new routes BED			8		Kings Cross		
NEW012	Newland Primary School			9		Legrave		
RAIL1	Virgin Railways			10		Luton		
RISK	Risk Assessment			11		St Albans		
SAMP	samp			12		St Pancras		
SHAR1	Clapham, Milton Ernest to Shi SHA	ι		13	:	Watford Junction		
SHAR10	Bolnhurst, Thurleigh, Bletsoe SHA	L I						
SHAR11	Whitwick Green connection fo SHA	2						
SHAR12	Riseley to Sharnbrook Upper SHA	2						
SHAR13	Shelton to Sharnbrook Upper SHA	٤						
SHAR14	Yielden to Sharnbrook Upper SHA	٤						
SHAR15	Oakley to S'bk US (Medical fo SHA	۱.						
SHAR2	Clapham to Sharnbrook Uppe SHA	2						
SHAR3	Clapham to Sharnbrook Uppe							
SHAR4	Oakley to Sharnbrook Upper (SHA	L						
SHAR5	Stevington and Pavenham to SHA	L I						
SHAR6	Turvey, Carlton, Harrold to SI							
SHAR6	Turvey, Carlton, Harrold to SI SHA							
SHAR7	Wymington and Podington to SHA	2						
SHAR7	Wymington and Podington to							
SHAR8	Dean, M'Bourne, Knotting, S'(SHA	2						
SHAR9	Pertenhall, Ltl Staughton, KeySHA	۰						
TBA	To Be Advised	~						

- 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 90.
- 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 trans	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 46.

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 *90*.
- 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.

Code			_	эп	ARIZ-	· Riseley	to Sharnbrook Upper School		
Description				Deta	ails S	tops Lo	ading Passengers Drivers & assistant	ts Surveys Map	
Base	Schools	Q	×				Step active between	10/10/2014 and	dd/mm/yyyy
Туре	All types		•	_		_	-		
Area	All				Step 💠	Time	Description	Valid from	Valid to
			51		1	08:00	Riseley, Pippin's Wood Riseley, The Five Bells	05/09/1991 05/09/1991	
Dates	Current		•		3	08:05	Riseley, Bourne End Road	05/09/1991	
	[ cle	ar] Sear	ch		4	08:20	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			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								
New route	New route description								
NEW012	Newland Primary School		н						
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	Shi SHAR							
SHAR10	Bolnhurst, Thurleigh, Blets	oe SHAR							
SHAR11	Whitwick Green connection	n fo SHAR							
SHAR12	Riseley to Sharnbrook Upp	er SHAR							
SHAR13	Shelton to Sharnbrook Upp	per SHAR							
SHAR14	Yielden to Sharnbrook Upp	er SHAR							
SHAR15	Oakley to S'bk US (Medica	I fo SHAR							
SHAR2	Clapham to Sharnbrook Up	ope SHAR							
SHAR3	Clapham to Sharnbrook Up	ope							
SHAR4	Oakley to Sharnbrook Upp	er !SHAR							
SHAR5	Stevington and Pavenham	to SHAR							
SHAR6	Turvey, Carlton, Harrold to	SI							
SHAR6	Turvey, Carlton, Harrold to	SISHAR	*						
Showing 1 - 4	13 of 43	ev   next >		Show	ing 1 - 8 (	of 8			

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 90.
- 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 90.
- 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 *90*.
- 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 Pass	engers Drivers & assistan	nts Surveys Map	
Base	Schools	Q.X				
Туре	All types	•	show only passenger name or from	10/10/2014 until	10/10/2014 Refresh	[actions ▼]
Area	All	•	Passenger *	Boards At	Alights At	
Dates	Current	•		08:05 R	08:20 SI	_
Dates	ounon		4	15:30 S	15:45 Ri	^
		[clear] Search		08:00 R	08:20 SI	
Code	Description	Area	4	15:30 S	15:50 Ri	

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 <u>Selecting a Route</u> on page 90.
- 2. Select the Drivers & assistants tab.
- Click the add a new driver or assistant hyperlink to display editable fields related to driver and assistant details.

	[0	lear] Search						
Code	Description	Area	[ add new driver or as	ssistant   delete selected d	driver or assistar	nt]		
LEE	Lee Test Route	^						
LEE7	Leagrave Junior School	BED	Name				*Q <b>X</b>	
N_01	TR-N/W Route1	BED	Every	$\mathbf{\nabla}$ $\mathbf{\nabla}$ $\mathbf{\nabla}$ $\mathbf{\nabla}$	from	10/10/2014	🛓 until dd/mm/yyyy	
N001	T123		Lvery		S S	10/10/2014		
New route	New route description		Outward from	stop	Q X @ 1	hh:mm to	stop or base	QX @ hh:mm
NEW012	Newland Primary School		Returning from	stop or base	Q X @	hh:mm to	stop	QX @ hh:mm
RAIL1	Virgin Railways		returning nom	atop of base		111.1111	Stop	
RISK	Risk Assessment							Memo 🕂
Route_From	Route_From	BED	> Udf					
Route_To	Route_To	BED						_
Route1	route1	BED						[cancel] Save

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

Search for	Active drivers		•
Name	Any name character	S	
Contractor			Q. <b>X</b>
Person Id			
Postcode		Type Any	· •
Base	Select a base		Q. <b>X</b>
Date of birth	dd/mm/yyyy		
Gender	Either		-
		Use contains m	natching for names
		[clear show	v 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 90.
- 2. Select the Drivers & assistants tab.
- 3. Highlight the driver/assistant you want to delete.

[one] P	rocesses People C	Operations L	Itilities Admin	Web	come SYSADMIN	Help	Change Passwo	rd   Logout
Stops F	Routes Contractors	Contracts	Bulk contract renewa	I				
Code			BDCC01 - E	Bedford Day Care	e Centre - Rou	ute 01		
Description			Details		Diversi	istanta 🗍		
Base	Schools	Q. <b>X</b>	Details Stops	Loading Pass	engers Drivers	& assistants	Surveys Map	Until
Туре	All types	•	Driver		Hume		11011	Until
Area	All	•	Assistant					
Dates	Current	-						
	[ cl	ear] Search						
Code	Description	Area	[ add new driver or a	assistant   delete selected o	triver or assistant ]			
BDCC01	Bedford Day Care Centre	- Rc BED						
DWBT2	Whitwick Green connectio		Name			* C	2,36	
GA01	Green Abbey - MapInfo ro	ute						
GRAN1	Brickhill to Grange School	(Ta	Every	MTWTF	from dd/	mm/yyyy 🌲	until dd/mm/yyyy	
GRANHI	Grange Hill Primary		Outward from	stop	<b>Q X</b> @ hh:mn	n to	stop or base	🗙 @ hh:mm
LEE	Lee Test Route		Detuning from		QX @ hhimn			XX @ hh:mm
LEE7	Leagrave Junior School	BED	Returning from	stop or base	AX @ hh:mn	n to	stop	A Chh:mm
N_01	TR-N/W Route1	BED						Memo 🕂
N001	T123							[cancel] Save
new route	new routes	RED						

- 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 90.
- 2. Select the Surveys tab.
- 3. Click the **add new survey** hyperlink to display editable fields relating to survey details.

[one] P	rocesses People	Operations U	tilities Admin	Welcome SY SA DWI	I Help I	Change Password	Logout
Stops F	Routes Contractors	Contracts I	Bulk contract renewal				
Code			BDCC01 - Bec	ford Day Care Centre - R	oute 01		
Description			Details Stops	Loading Passengers Driver	rs & assistants Survey	s Map	
Base	Schools	Q.X	Date 🔶	Contractor	s & assistants Survey	Surveyor	
Туре	All types	•					
Area	All	•					
Dates	Current	•					
		[clear] Search	[add new survey   dele	te selected survey ]			
Code	Description	Area					
	Contraction of the local division of the loc	~	Date dd/mr	n/yyyy 🙀 Time hh		• +	
	-		Contractor		Q.X.* [details]		
	And in case of	10.00	Surveyor		Q X #		
			Driver		0.8		
	-	100					
	and an entry lines	10.000	Passenger count				
	100		Entitled	Temporary Assistants	Others	Total 0	
	Support and					[ca	ncel] Save
PATE 1	Virgin Pailways					[ 00	

- 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		
Archer Carrs	Hu r	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	3.	<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.

	Select	a Driver	
Search for	Active drivers		
Name	Any name character	s	
Contractor			QX
Person Id			
Base	Select a base		Q. <b>X</b>
Date of birth	dd/mm/yyyy		
	Name	[C	ear   show all   hide all ] Sear
1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 -			MK43 7HW
Showing 1 - 1 of 3	1		< prev   next >
			[cancel] Select

- 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 111.

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

- 1. Select a route. For more information on selecting routes, see <u>Selecting a Route</u> on page 90.
- 2. Select the Surveys tab.
- 3. Highlight the survey you want to delete.

[one]	Processes	People	Operations	Utilities	Admin	E	Welcome SI	SADMIN	1	Help	I	Change Password	1	Logout
Stops	Routes	Contractors	Contracts	Bulk contr	act renewal									
Code				BDO	CC01 - Bec	dford Day	Care Cent	tre - Rou	ute 01					
Descriptio	n			Detai	s Stops	Loading	Passengers	Drivers &	assista	nts	Surv	eys Map		
Base	Schools	3	QX		ate 🔶		Contractor					Surveyor		
Туре	All types	8	•	12/03	/2017 Berni	e's Taxis					1			
Area	All		-											
Dates	Current		•	]										
			[clear] Search	[ add	new survey   dele	te selected surve	<u>y</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 90.
- 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.

# **06** 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 the <u>One</u> <u>Publications</u> website.

# **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] All [clear] Search		Active	Comment		
		Company name		* Code	
		Legal name			
emence Cars	~	Primary operator type	Select operator type	-	
ontractor 2					
ox Cabs		Other operator type(s)	Select other operator type(s)	•	
Illen Coaches		Area(s) covered	Select area(s)	-	
ave's Taxis					
an Travel		Proprietor	Select a person		QX
xon Coaches		Contact name			*
oughty Minibus Hire					Q×
ddy Cars		Address			ų ×
F company Itd		Email			
ance Motors		Phone 1			
eoffrey's Coaches					
G Company		Phone 2			
range Taxis		Fax			
arbottle Cars		Address phone			
aywood Coaches		Address phone			
owles Coaches and Minibuses		Creditor ref code	Registration	application date	dd/mm/yyyy
nes Speed					sources (1997)
timer Travel		Produces own tickets	Memo 🕇	F	
tters Travel		> Udf			
van inactive					
van_Contractor - Lavan_Contractor					[cancel] Save
A					
ndon Transport	~				
ton and District nowing 1 - 63 of 63 <pre> &lt; prev   next &gt;</pre>					

- 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 *105*.
- 2. Ensure that the **Details** tab is selected. Editable fields relating to contractor details are displayed.

Area	•	Details Routes Ve	ehicles Checks Payments	
Vehicle registration All	- Search	Active	Comment 2nd Phone No for Yard	
[]		Company name	Cullen Coaches * Coa	le
Name		Legal name		
Clemence Cars	~	Primary operator type	PSV - PSV 👻	
Contractor 2				
Cox Cabs		Other operator type(s)	Select other operator type(s)	
Cullen Coaches		Area(s) covered	SHAR - Shambrook 🔹	
Dave's Taxis				
Dean Travel		Proprietor	Select a person	Q. <b>X</b>
Dixon Coaches		Contact name	M	*
Doughty Minibus Hire				Q.#
Faddy Cars		Address		4.4
FFF company ltd		Email		
France Motors		Phone 1		
Geoffrey's Coaches				
GG Company		Phone 2		
Grange Taxis		Fax		
Harbottle Cars		Address phone		
Haywood Coaches		Audress prione		
Howles Coaches and Minibuses		Creditor ref code	Registration application date	dd/mm/yyyy
Jones Speed		01000010100000		
Latimer Travel		Produces own tickets	Memo +	
Latters Travel		> Udf		
lavan inactive				_
Lavan Contractor - Lavan Contractor		[ View drivers & Passenger	assistants 1	[cancel] Save

- 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 *105*.
- 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	es Checks Payments	
Vehicle	registration All	•	Active	Comment 2nd Phone No for	Yard
	[ clear	] Search			
		_	Company name	Cullen Coaches *	Code
Name	_		Legal name		
Clemence Cars		^	Primary operator type	PSV - PSV -	
Contractor 2			Other operator type(s)	Select other operator type(s)	
Cox Cabs			Other operator type(s)	Select other operator type(s)	
Cullen Coaches			Area(s) covered	SHAR - Shambrook 🗸	
Dave's Taxis					
Dean Travel			Proprietor	Select a person	QX
Dixon Coaches			Contact name	M	*
Doughty Minibu	is Hire				Q.X
Faddy Cars			Address		~*
FFF company It	d		Email		
France Motors			Phone 1		
Geoffrey's Coad	ches				
GG Company			Phone 2		
Grange Taxis			Fax		
Harbottle Cars			Address phone		
Haywood Coach	hes		Address priorie		
Howles Coache	s and Minibuses		Creditor ref code	Registration application date	dd/mm/yyyy
Jones Speed					
Latimer Travel			Produces own tickets	Memo +	
Latters Travel			> Udf		
lavan inactive					_
Lavan_Contract	tor - Lavan_Contractor		[ View drivers & Passenger assist	stants ]	[cancel] Save
LEA					
London Transpo	ort	~			
Luton and Distr					
Showing 1 - 63	of 63 < pr	ev   next >			
[ create new cont	tractor   delete contractor   exp	ort ]			

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 *105*.
- 2. Select the **Routes** tab to display a list of all routes serviced by that contractor.

[one]	Processes	People	Operations	Utilities	Admin	We	come sysadmin	He	elp	Change Password		Logout
Stops	Routes	Contractors	Contracts	Bulk cont	tract renewal							
Search	or Active of	ontractors	•	A1	Cars							
Name	Any na	me characters		Mark F	Reeve	mark.reeve@	freeser	01234 384	741		[ ac	tions 🛡 ]
Туре	All		•									
Area	All		•	Detai	Is Routes	Vehicles Che	cks Payments	5				
Vehicle	registra		ear ] Search	Show	only Route co	ode or description or	irom dd/mm/yyyy	/ until de	d/mm/yyyy	[ show all ] Refresh	[8	actions <b>v</b> ]
		[ CR	ear ] Search	Code	e 🗢 🛛 Des	cription		Operatio	nal area	From	Until	
				00000	03 Wob	urn to Cedars Upper S	School 2			12/01/1993	01/04/	2001
Name				123	Brick	chill to Grange School	(Tail-Lift)			01/03/1998	31/03/	(1998
A1 Cars				123	Brick	chill to Grange School	(Tail-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 *110*.

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 150.

- 1. Select a contractor. For more information on selecting contractors, see <u>Selecting a Contractor</u> on page *105*.
- 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] Pro	ocesses Pe	eople <mark>C</mark>	perations	Utilities	Admin		Welcome sycadmin	Help	Change	Password	Lo
Single passe	<mark>nger</mark> Multip	ble passeng	ers Bulk	transfer							
Search for	Active contract	ors	•	A1	Cars						
Name	Any name cha	racters					an an anger a				[actions
Туре	All		•								
Area	All		•	Deta	ils Ro	utes Vehicle	s Checks Payments				
Vehicle	registration	All	•	~ V	ehicle ty	nes					
		[ clear	] Search			al management	•				
Name					Quantity	Туре	Description	Seatin	g W/chairs		(Incl. ding)
1 Cars				1		HEL1	Helicopter	5	0	5	21
rcher Carrs				1		CHA1	Chariot	2		2	
rrow Travel				1		DON1	Donkey	1		1	
Auckland Taxi	s										
Bailey Travel						1					
Barton Private	Hire			[a	aa new type	change quant	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.

Add new vehicle type 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 *105*.
- 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>Operations</mark>	Utili	ties Admin		Welcome ayaadimin	Help	Change Pas	sword   Logo
Single passe	<mark>nger</mark> Multiple passengers E	ulk transf	fer					
Search for	Active contractors	•	A1 Cars					
Name	Any name characters		-					[actions ]
Туре	All	•						
Area	All	•	Details Ro	outes Vehicl	es Checks Payments			
Vehicle	registration All	•	✓ Vehicle ty	mes				
	[clear] Searc			al management	•			
Name		-	Quantity	Туре	Description	Seating	W/chairs	Max (Incl. standing)
A1 Cars		~	1	HEL1	Helicopter	5	0 5	
Archer Carrs			1	CHA1	Chariot	2	2	
Arrow Travel			1	DON1	Donkey	1	1	
Auckland Taxi	s							
Bailey Travel					the desired second second			
	Hire		[ 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 o	f MB16
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 *105*.
- 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	rocesses People	Operations Uti	ilities Admin		Welcome <b>sysad</b>	min   Help	Change Pa	issword   Log
Single passe	enger Multiple passe	ngers Bulk trans	sfer					
Search for	Active contractors	•	A1 Cars					
Name	Any name characters				and the support of			[actions ]
Туре	All	•						
Area	All	•	Details	outes Vehicl	es Checks Payn	nents		
Vehicle	registration All	•	Vehicle ty	pes		14		
	[ cle	ear] Search		al management	•			
Name			Quantity	Туре	Description	on Seating	W/chairs	Max (Incl. 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	is							
Bailey Travel					rh - 1 - antata antata di ma			
Barton Private	e Hire		[ add new type	e   change quan	tity   delete selected type	1		

- 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 105.
- 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 Routes	Vehicles Check	s Payments							
Vehicle	registration	All	•	> Vehicle types									
		[clear]	Search	✓ Individual ve									
Name				Registration	Type / description	From	Until	Ins exp	Тах ехр	МОТ ехр			
A1 Cars				ov08 zng	CO53-bus	01/10/2014		10/11/2014	29/10/2014	08/10/2014	•		
			^										
ani10 - ani10													
ani131 - ani1	131												
Archer Carrs													
Arrow Travel													
asa - asa													
Auckland Tax	kis			[ add new vehicle	see checks for this vehicle	e   delete vehicl	e ]						

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 ¥]
<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	Тах	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 *105*.
- 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 Payments							
Vehicle	registration All		> Vehicle types									
	[clear] Searc		✓ Individual ve	hicles								
Name			Registration	Type / description	From Until	Ins exp Tax e	ехр МОТ ехр					
A1 Cars			ov08 zng	CO53-bus	01/10/2014	10/11/2014 29/10	/2014 08/10/2014 🔒					
ani10 - ani10	0	^										
ani131 - ani:	131											
Archer Carrs	1 / · · · · · · · · · · · · · · · · · ·											
Arrow Travel	L											
asa - asa												
Auckland Ta:	xis		[ add new vehicle	see checks for this vehicle	e   delete vehicle ]							

- 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 *105*.
- 2. Select the **Checks** tab and then click the **record new check** hyperlink. Editable fields related to vehicle checks are displayed.

Area	All		Details F	Routes	Vehicles	Checks	Payments				-
Vehicle	registration All	11	Show checks o	n [	registration	between	dd/mm/yy	/yy and	10/10/2014	[clear]	Se
	[clear] Search		Registratio	n <del>\$</del>	Type/descript	ion		Date	Roadworthiness		
Name											
A1 Cars											
ani10 - ani10											
ani131 - ani13	1										
Archer Carrs											
Arrow Travel											
asa - asa											
Auckland Taxis	5		No records to								
Bailey Travel			record new ch							< prev   next	C 0
Barton Private	Hire		[ record new ch	eck   de	elete check J						
Bernie's Taxis			Registration		*	was ch	lecked on	dd/mm/yyyy			
Better Travel			Checked by				a x	* details			
Bond Travel			chound by				• • •				
Bowers Minibu	ses		Туре	- Ve	hicle Type		•				
BR-Contractor:	1-Plsdn't use - BR-Contractor1-Plsdn't u		Outcome	Ro	adworthiness	•	Memo +				
Carter Coaches	5									[Cancel]	

- 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 148.

- 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 *105*.
- 2. Select the **Checks** tab to display vehicle search fields.

[one]	Processes	People	Operations	Utilities	Admin		Welcome		1 1	Help		Change Password		Logout
Stops	Routes	Contractors	Contracts	Bulk cont	ract renewa	al								
Search fo	or Active of	ontractors	•	A1	Cars									
Name	Any na	me characters				1.000	-						[ a	ctions 🔻 ]
Туре	All		•											
Area	All		•	Detai	s Route	tes Vehicles	Checks	Payments	2					
Vehicle	registra	Ition	•	Show	hecks on	registration	between	dd/mm/yy	уу	and	14/	03/2017	clear]	Search
		[ cl	ear] Search	Regi	stration 🚖	Type/descript	ion		Date	R	oadw	orthiness		

- 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 *105*.
- 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	Welcome		Help		Change Passw	ord	Logout
Stops	Routes	Contractors	Contracts	Bulk c	ontract renewa	I						
Search fo		ve contractors	•		1 Cars	mark.reeve@freeser		01234 384741				
Name	Any	name characters		INIA	K Reeve	mark.reeve@ireesei	L	11234 304/41			[ a	ctions ♥]
Туре	All		•									
Area	All		•		etails Route	s Vehicles Checks	Payments					
Vehicle	reg	stration All	-	,	Vehicle type	s						
		[ cl	lear] Search	~	Individual ve	hicles						
Name					Registration		rom U	Intil Ins	ехр	Тах ехр	МОТ ехр	
A1 Cars					B4NHUR	CHA1-Chariot						
Archer Car	rs				CHOPPA	HEL1-Helicopter						_
Arrow Trav	/el				D0BB1N	DON1-Donkey						
Auckland T	Taxis											
Bailey Trav	vel											
Barton Priv	vate Hire											
Bernie's Ta	axis				add new vehicle	see checks for this vehicle	delete vehicle	]				

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 *105*.
- 2. Select the **Checks** tab. A list of that contractor's previous vehicle checks is displayed.

Search for	Active contractors	A1 Cars				
Name	Any name characters	Mą	internation	1. 1993		[ actions ♥ ]
Туре	All					
Area	All	Details Rou	tes Vehicles Checks	Payments		
Vehicle	registration All	Show checks on	registration betwee	n dd/mm/yyyy	and 10/10/2014	[clear] Search
	[clear] Search	Registration 4	Type/description	Da	ate Roadworthing	ess
		T3ST 01	CO55 - Coach (55 seater	)		
Name						
A1 Cars						
ani10 - ani10						
ani131 - ani1	31					
Archer Carrs						
Arrow Travel						
asa - asa						
Auckland Tax	is					
Bailey Travel		Showing 1 - 1 o				< prev   next >
Barton Privat	e Hire	[ 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 *105*.
- 2. Select the **Payments** tab. A list of the selected contractor's previous payments is displayed.

Area	All		•	Details Routes	Vehicles Checks F	Payments				
Vehicle	registration All		•	Invoice reference	Route code & description	Period from	Until	Due on	Net amount	
		[clear] Se	arch	543	NEW012 - Newland Primary 5	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	
			^	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	~
1000				[ create single new payn	nent   generate multiple new payme	ents   delete paym	ient]			

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

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         Net amount       0.00       (pounds) *         VAT       0.00       (pounds) @       0.00 %         Total payment       0.00	Serial number	0 (this u	nique number is a	automatically generated)	
Period from     dd/mm/yyyy * until     dd/mm/yyyy *       Entered on     10/10/2014     Due on     dd/mm/yyyy Paid on       Net amount     0.00     (pounds) *       VAT     0.00     (pounds) @	Invoice reference			* (from contractor)	Memo 🕂
Entered on         10/10/2014         Due on         dd/mm/yyyy         Paid on         dd/mm/yyyy           Net amount         0.00         (pounds) *         VAT         0.00         \$0.00 %         <	Contract		٥	LA reference number	
Net amount         0.00         (pounds) *           VAT         0.00         (pounds) @         0.00 %	Period from	dd/mm/yyyy	\star until	dd/mm/yyyy 🕷	
VAT 0.00 (pounds) @ 0.00 %	Entered on	10/10/2014	Due on	dd/mm/yyyy Paid on	dd/mm/yyyy
	Net amount	0.00	(pounds) 🕷		
Total payment 0.00	VAT	0.00	(pounds) @	0.00 %	
	Total payment	0.00			

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	umber			
Route	ode or descript	ion		
				[clear] Search
Contract	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
245		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
howing 1 - 13 of 13	8 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 119.

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**

- Select a contractor. For more information on selecting contractors, see <u>Selecting a Contractor</u> on page 105.
- 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			•	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 💙
100				[ create single new payn	nent   generate multiple new payme	ents   delete paym	ent]		

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

Ge	enerate multiple new payn	nents to A1 Car	\$	
Generate all payments for period from	dd/mm/yyyy	to dd/mm/yyy	Preview	l
				[cancel] Finish

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	;		
Generate all paymer	ts for period from 11/05/2016	to 11/05/2016	Preview		
Apply to all	voice 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**.
- 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 *105*.
- 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 -		•	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		
					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	1	
100					[ 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	T	Help	I	Change Password	T	Logout
Stops	Routes	Contractors	Contracts	Bulk con	tract renewal									
Include	Curren	t and future contr	acts 💌	No	contract sel	ected								
Number	Contra	ct number												
Name	Contra	ctor name							-		-		-	
Туре	All		•	Deta	ils Costs	Payments								
Route	route		Q <b>X</b>											
		I	clear ] Search											

- 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 the <u>One</u> <u>Publications</u> website.

## **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]	Processes	People	Operations	Uti	ilities Admi	n Welcome apadmin   Help   Change Password	Logout
Stops	Routes	Contractors	Contract	e B	Bulk contract rer	newal	
Include	Currer	t and future contra	acts	-			
Number	Contra	act number			A1 Cars	Route MISC - Miscellaneo 01/02/2001 until	[actions ¥]
Name	Contra	actor name					
Туре	All			•	Details	Costs Payments	
Route	route		9	×		I	actions <b>v</b> ]
Noule	Toute				Contractor	A1 Cars Q.X*	
		[	clear] Sear	h			
					Number		
Contractor		oute	Date		Туре	Please select 👻 🕷	
		11111 - Woburn		~	Route	MISC - Miscellaneous Social Service Payments Q X*	
A1 Cars		HAR13 - Shelton					
A1 Cars		ISC - Miscellaneo					
Archer Carr		HAR1 - Clapham,			Start date	01/02/2001 * Started because Nothing selected	
Archer Carr		91GP - Woburn t			End date	dd/mm/yyyy Ended because Nothing selected	
Arrow Trave		HAR4 - Oakley to			Memo	+	
Arrow Trave		WB3 - Domsday			мето	· · · · · · · · · · · · · · · · · · ·	
Arrow Trave		A01 - Green Abb				[cancel] Save	
Arrow Trave		BB001 - Abbey M					
Auckland Ta		HAR7 - Wymingt					
Auckland Ta		TEVE1 - Woburn					
Auckland Ta Bernie's Tax		HAR7 - Wymingt DCC01 - Bedford					
Contractor 2		DCC01 - Bearora D02 - TR-Route2					
		HAR11 - Whitwic					
Dave's Taxis		HAR11 - Whitwic					
FFF compan		TT - Test1 - Test					
FFF compan		001 - TR-Route1					
Jones Speed		HAR9 - Pertenhal					
Latimer Tra		HAR5 - Stevingto					
Mastek mot		RANHI - Grange					
Mastek mot		RANHI - Grange					
McGowan's		HAR15 - Oakley t					
McQueen Tr	ransport S	HAR10 - Bolnhun	st,01/07/199	5			
- Murdoch Tra	avel S	HAR12 - Riseley	to 05/09/199	L 🗡			
Showing 1 -	- 29 of 29	<	prev   next :				
[ create new	contract   de	lete contract   expo	ort]				

- 3. Select a Contractor:
  - 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		
Archer Carrs	Hu r	4	$\checkmark$
Arrow Travel	Jo	8	$\checkmark$
asa	as		✓
Auckland Taxis	Jo	8	✓
Bailey Travel	Ch	9	✓
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.

	Select from all availa	ble routes	
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			
No records to vi	ew		< prev   next >
			[cancel] Select

- 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 *116*.
- 2. Ensure that the **Details** tab is selected. Editable fields related to contract details are displayed.

Include	Current and future contr	racts •						
Number	Contract number		Arrow Travel	Route S	HAR4 - Oakley to	01/10/2	000 until	[ actions ¥
Name	Contractor name							
Туре	All	•	Details	osts Payments				
Route	route	Q. <b>X</b>						[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 SI	arnbrook Upper Schoo	l	Q.¥#	
Archer Carrs	891GP - Woburn	to 01/06/2000						
Arrow Travel	SHAR4 - Oakley t	to 501/10/2000		01/10/2000 *				
Arrow Travel	DWB3 - Domsday	r D; 07/06/2000	Start date	01/10/2000 *	Started because	Nothing selected		•
Arrow Travel	GA01 - Green Abl	bey 01/09/2006	End date	dd/mm/yyyy	Ended because	Nothing selected		•
Arrow Travel	ABB001 - Abbey	Mid 02/10/2000		+				
Arrow Travel	NNR3 - Neels Jou	rne 01/09/2014	Memo	Ŧ				
Arrow Travel	NNR3 - Neels Jou	rne 01/12/2014	> Udf					
Arrow Travel	ND - Neels DTD R	Rou 01/12/2014						
Arrow Travel	ND - Neels DTD R	Rou 01/09/2014					[cancel] Sa	ve

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 *116*.

Name	Contractor name							
Туре	All	•	Details 0	Costs Payments				
Route	route	Q×						[actions ¥]
			Contractor	Arrow Travel			Q. <b>X</b> *	
	[ c	lear] Search	Number					
			Number					
Contractor	Route	Date	Туре	Please select	▼ *			
ani10 - ani10	test21 - test	02/10/2014 🔨	Route	SHAR4-Oakley to Sha	arnbrook Upper Schoo	bl	Q.X*	
Archer Carrs	891GP - Woburn to	01/06/2000						
Arrow Travel	SHAR4 - Oakley to	501/10/2000						
Arrow Travel	DWB3 - Domsday [	D:07/06/2000	Start date	01/10/2000 *	Started because	Nothing selected	•	
Arrow Travel	GA01 - Green Abbe	ey 01/09/2006	End date	dd/mm/yyyy	Ended because	Nothing selected	•	
Arrow Travel	ABB001 - Abbey Mi	id 02/10/2000	Memo	+				
Arrow Travel	NNR3 - Neels Journ	ne 01/09/2014	WIGHTU					
Arrow Travel	NNR3 - Neels Journ	ne 01/12/2014	> Udf					
Arrow Travel	ND - Neels DTD Ro	u 01/12/2014					[ cancel ] Save	
Arrow Travel	ND - Neels DTD Ro	u 01/09/2014						
Arrow Travel	INT-BR1234 - Desc	cr 06/10/2014						
Arrow Travel	NROUTE - Neels ST							
Arrow Travel	NROUTE - Neels ST							
Arrow Travel	NNR2 - Neels NET							
Arrow Travel	NNR2 - Neels NET	R 01/09/2014						
Auckland Taxis								
Auckland Taxis		_						
Auckland Taxis								
Auckland Taxis	<u> </u>	_						
Auckland Taxis								
Bailey Travel	SHAR1 - Clapham,	_						
Bailey Travel	SHAR1 - Clapham,							
Bernie's Taxis	BDCC01 - Bedford							
	1-Plsd 9 - BR-Route9	12/09/2014						
BR-Contractor1 Showing 1 - 59	1-Plsd 3 - BR-Route3	08/10/2014 prev   next >						
	itract   delete contract   expor							

- 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 *116.*
- 2. Select the **Costs** tab and open the **Costs** section. Editable fields relating to contract costs are displayed.

Name	Contractor name			D-1-1	Durante				
Туре	All	•		Details Costs	Payments				
Route	route	٥,	¢	✓ Costs					
	ſ	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 %
ani10 - ani10	test21 - test	02/10/2014	~	Total Hot obot		pluo	with de	Clandard rate frit	,
Archer Carrs	891GP - Woburn t	to 101/06/2000		Gross Total	£ 211.50	including VAT			
Arrow Travel	SHAR4 - Oakley to	o 501/10/2000		Monthly cost		(pounds)			
Arrow Travel	DWB3 - Domsday	D:07/06/2000				(position)			
Arrow Travel	GA01 - Green Abb	bey 01/09/2006		Season cost		(pounds)			
Arrow Travel	ABB001 - Abbey N	Mid 02/10/2000							[cancel] 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 *116*.
- 2. Select the **Costs** tab and open the **Revisions** section. A list of the contract's past and current revisions is displayed.

ie] Pro	ocesses Peo	ople Operations	Utilitie	s Admin		Welcome synadi	nin	Help	Change Password	L
Stops R	outes Contra	actors Contracts	Bulk	contract renewa	1					
Include	Current and futur	re contracts								
Number	Contract number	er			R	oute 111111 - Woburn to		until		[8
Name	Contractor nam	e			_	_				-
Туре	All			Details Costs	Payment	S				
Route	route	٩	x	> Costs						
		[clear] Searc		<ul> <li>Revisions</li> </ul>						
Contractor	Route	Date		Date 🔶	Daily cost	Daily asst. cost	Reason	n	Status	
	111111 - V	Voburn to	~	13/03/2017	1.00	0.00			Not processed	
A1 Cars	SHAR13 - 5	Shelton tc 05/09/1991		12/03/2017	5.00	0.00			Not processed	
A1 Cars	MISC - Mis	cellaneou 01/02/2001								
Archer Carrs	SHAR1 - C	lapham, №28/04/1997								
Archer Carrs	891GP - W	oburn to 101/06/2000								
Arrow Travel	SHAR4 - O	akley to \$01/10/2000								
Arrow Travel	DWB3 - Do	msday D:07/06/2000								
Arrow Travel	GA01 - Gre	en Abbey 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 *116.*
- 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 *116.*
- 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.

#### Managing Contractors and Contracts

	Processes	People	Operations	Utilities	Admin		Welcome sysa		Help		Change Password		
s	Routes	Contractors	Contracts	Bulk	contract renewa	al							
clude	Current	t and future contr	racts 💌										
umber	Contra	ct number				R	toute 111111 - Woburn to		un	til		[ ac	
Name	Contra	ctor name				_	-						
Туре	All		•		Details Cost	Payment	ts						
Route	route		QX	: ,	Costs								
		I	[clear] Search		Revisions								
ontracto	r R	oute	Date		Date 🔶	Daily cost	Daily asst. cost	Reaso	on		Status		
	11	1111 - Woburn		~	13/03/2017	1.00	0.00				Not processed		
1 Cars	SH	AR13 - Sheltor	n tc 05/09/1991		12/03/2017	5.00	0.00				Not processed		
1 Cars	MI	ISC - Miscellane	eou 01/02/2001										
rcher Carr	rs SH	IAR1 - Clapham	n, №28/04/1997										
rcher Carr	rs 89	1GP - Woburn	to (01/06/2000										
rrow Trave	el SH	IAR4 - Oakley t	to \$01/10/2000										
rrow Trave	el D\	NB3 - Domsday	/ D;07/06/2000										
rrow Trave	el GA	A01 - Green Abl	bey 01/09/2006		f add revision(s)	Ledit revision Ld	lelete revision 1						

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 *116*.
- 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] I	Processes	People	Operations	Utilities	Admin	Welcome sysadmin	Help	Change Password	Logou
Stops	Routes	Contractors	Contracts	Bulk c	ontract renewal				
Include	Current	and future contra	acts 👻						
Number	Contrac	ct number				Route 111111 - Woburn to	until		[ actions 🔻
Name	Contrac	ctor name							
Туре	All		•	P	etails Costs	Payments			
Route	route		QX	- ,	Costs				
		[	clear] Search		Revisions				
Contractor	r Ro	oute	Date		Budget codes				
		1111 - Woburn		^ Ť	Budget codes	•			
A1 Cars		IAR13 - Shelton			Budget code &	description			%
A1 Cars		SC - Miscellane			PRI - Primary Tr	ansport			10
Archer Carr	s SH	IAR1 - Clapham	, №28/04/1997						
Archer Carr	s 89	1GP - Woburn t	to 101/06/2000						
Arrow Trave	el SH	IAR4 - Oakley to	o 501/10/2000						
Arrow Trave	el DV	VB3 - Domsday	D;07/06/2000						
Arrow Trave	el GA	01 - Green Abb	bey 01/09/2006						
Arrow Trave	el AB	B001 - Abbey N	Mid 02/10/2000		add budget code	edit budget code   remove budget code ]			
Auckland Ta	axis SH	IAR7 - Wymingt	ton 01/01/2001					[ can	cel ] Save

3. Click the **add budget code** hyperlink to display the **Add budget code** dialog.

	Add budget co	de	
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 *154*.

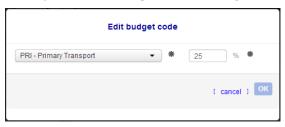
- 5. Enter a % value for the budget code. This is the percentage of the total cost which each of the budget codes will bear within the year for each contract.
- 6. Click the **OK** button to add the code to the contract and close the dialog.

#### **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 the <u>One Publications</u> website.

- 1. Select a contract. For more information on selecting contracts, see <u>Selecting a Contract</u> on page *116*.
- 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 *116.*
- 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	
	[ clea	r] Search	> Revisions	
Contractor	Route	Date	✓ Budget codes	
	111111 - Woburn to	~		
A1 Cars	SHAR13 - Shelton tc0		Budget code & description	%
A1 Cars	MISC - Miscellaneou 0	1/02/2001	SEC - Secondary Transport	100
ani10 - ani10	567 - test 0	1/10/2014		
ani10 - ani10	test21 - test 0	2/10/2014		
Archer Carrs	891GP - Woburn to (0	1/06/2000		
Arrow Travel	SHAR4 - Oakley to 50	1/10/2000		
Arrow Travel	DWB3 - Domsday Di0	7/06/2000		
Arrow Travel	GA01 - Green Abbey0	1/09/2006	[ add budget code   edit budget code   remove budget code	
Arrow Travel	ABB001 - Abbey Mid0	2/10/2000		[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 *116*.
- 2. Select the **Payments** tab. A list of all payments made against the selected contract is displayed.

Stops	Routes	Contractors	Contracts	Bulk contract renewal					
Include	Curren	t and future contrac	ts 🔹						
Number	Contra	ict number		Arrow Travel	Route SHAR4 - Oakley to		01/10/2000 un	til	[actions ¥]
Name	Contra	ictor name							
Туре	All		-	Details Costs	Payments				
				Invoice reference	Route code & description	Period from	Until	Due on	Net amount
Route	route		Q.X	EMS2	SHAR4 - Oakley to Sharnbroo	01/10/2002	31/10/2002		4,140.00
		[c	lear ] Search						

**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 113.

## **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 renewal										
Ren	iew all contract fo	or contrac	ctor		Q <b>X</b> * b	petween	dd/mm/yyyy	*	and	dd/m	m/yyyy	(		F	review

- 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.

[one]	Processes	People	Operations	Utilities /	Admin		Welcome	sysadmin	Help	p   (	Change Pa	assword	Logout
Stops	Routes	Contractors	Contracts	Bulk contra	ct renewa	al							
Rer	ew all contract for	Aucklan	nd Taxis		Q <b>X</b> *	between 02	/01/2017 *	and dd/r	nm/yyyy				Preview
Cor	ntract number	÷	Route code &	description						Fre	om	Until	
			STEVE1 - Wobu	urn to Cedars U	pper Schoo	ol				01	/06/2000		
			SHAR7 - Wymi	ngton and Podir	ngton to Sl	harnbrook US				01	/01/2001		
			SHAR7 - Wymi	ngton and Podir	ngton to Sl	harnbrook US				01	/09/2001		
Start new	contracts on	dd/mm/yyyy	* and end o	n dd/mm/y	/уу	or take end da	te from existing o	contracts					
End exist	ng contracts beau	ause	End of contract	•	and	start new contrac	ts because	New/F	irst Contract		•		
Apply a p	rice change of		₩ % round	ed to the nearest	se	elect		Daily cost	, Daily asst. c	ost, Monthly	/ cost and S	eason cost	•
										Į.	clear] Ren	ew selected of	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.

# **07** 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	Utilities Admin	Welcome aysa	i <mark>dmin  </mark> Help	o   Change	Password   Logout
Single passenger	Multiple passe	engers Bulk	transfer				
Personal info Process	s status		<b>A</b>				
Search for Active peo	ople in this autho	ority 👻		and the second		-	[actions ¥]
	lear   show all		[Passenger info   Persona	al info   Driver / assistant info ]			Maintain alerts
Name	DOB	Postcode					Linked documents
			Applications Asses	sments Journeys Ticke	ets Invoices	Payments out	Entity history
and increased			Date 💠	Address	De	stination	Sql mail merge
and Supervised	Stand Stand	COLUMN TWO IS NOT					Reports
-	A REAL PROPERTY AND						View communications
							Create communication
STATE OF THE OWNER	-		[ create new application   d	lelete ]			

The Actions menu

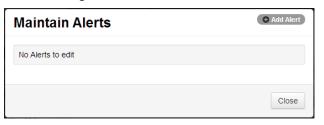
## **Managing Alerts**

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 the <u>One</u> <u>Publications</u> website.

#### **Creating an Alert**

1. Open the **actions** menu and select the **Maintain alerts** menu option to display the **Maintain alerts** dialog.



2. Click the Add Alert button to display the Add dialog.

Add	
Alert	
Expiry Date dd/mm/yyyy	ß
	Close Save

- 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	× x
	Close

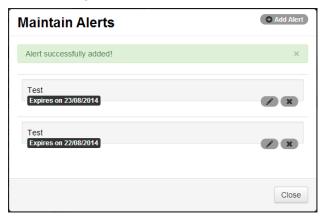
2. Click the **Edit** button for the alert you want to edit. The **Edit** dialog is displayed.

Edit	
Alert	
Test	
Expiry Date	
23/08/2014	
	Close Save

- 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 Alert?			
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.

	D	ocuments linked to	Carl Carlo	
File Descri	ption	File Name	Linked By	On
open this docume		w document   update docume	ent [ remove link ]	
Description	Please er	nter the description		
File Name			Copy to Database	<b>V</b>
			ī	cancel Close

- 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.
- 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 Descr	iption File Name	Linked By	On
ransport	Transport SAD.docx	System Administrator 10/10	0/2014
open this docum	ent   link a new document   update doc	ument   remove link ]	
open this docum Description	ent   link a new document   update doc Transport	sument   remove link ]	

- 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.
- 6. 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 I		
File Descr	ption File Name	Linked By	On
ransport	Transport SAD.docx	System Administrator 10/	10/2014
open this docum	ent   link a new document   update documer	it   remove link ]	
		it   remove link ]	
open this docum Description File Name	ent   link a new document   update documen Transport Transport SAD.docx	it [ remove link ] Copy to Database	2

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
Transport		Transport SAD.docx	System Administrator 10/	10/2014
open this docum	ent   link a	new document   update doc	ument   remove link ]	
Description	Trans	port		
File Name	Trans	port SAD.docx	Copy to Database	$\checkmark$
				Incel ]

- 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 Per	formed User Name	Timestamp	Note
	17279081107 Updated	SYSADMIN	10/10/2014 16:09:33	Linked Document Added
	17289081107 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 the <u>One Publications</u> website.

## **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 the <u>One Publications</u> website.

- 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 *49*.
- 2. Open the **actions** menu and select the **View communications** menu option to display the **View communications** dialog.

View	comm	nunio	ations			
То	From	Сс	About			
	BozA	aron				
[ cancel ] View						

- 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 76.

#### **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 *49*.
- 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 78.

## **08** 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 sysadmi		Help	Change Password	Logout
Address	catalogue	Nearest sch	nools Bulk p	print .	lob manager	RO import	Budget forecast	Reports	SSRS		
Postcode	e (	Postcode		וכ							
Street ad	ldress	Street address									
			[clear] Sear	ch							
				D	etails 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 sysadi	nin	Help	T	Change Pass	sword	I	Logout
Address	catalogue	Nearest sch	nools Bulk p	rint Jo	b manager	RO import	Budget forecast	Report	ts SS	RS				
						(	Create a new addr	ess in ar	n existin	g stre	eet			
							New addresses are usu	-		-				
					E	Even if you want to o	reate a new street, you	must still fin	st check he	re that	it doesn't alread	y 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	Utilitie	s Admin		Welcome sysadm		Help		Change Password		Logout
Address	catalogue	Nearest sch	ools Bulk	print	Job manager	RO import	Budget forecast	Report	s SS	SRS			
					Choo	se an existing	street below, ther	compl	ete the (	detail	s of the new addre	SS	
				D	ame Alice Street,	Bedford,MK40 18	BS						
				A	shburnham Road,	Bedford,MK40 1	DR						
				G	reyfriars,BEDFOR	D,Simshire,MK4(	0 1HJ						
				P	riory Street,Bedfo	rd,MK40 1HS							
				A	llhallows,Bedford,	MK40 1LT							
				M	lidland Road,Bedf	ord,MK40 1PL							
				н	orne Lane,Bedfor	d,MK40 1PZ							
				P	rebend Street,Bee	lford,MK40 1QN							
				н	igh Street,Bedfor	d,MK40 1RN							
				S	ilver Street,Bedfo	rd,MK40 1SY							
				M	IK40 2AB								~
				[ t	ry a different postco	de or street name	create an address in a ne	ew street i	nstead   ca	incel]			

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	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	re,MK41 0AQ							
			Goldington Road,Be	dford,MK41 0D	S							
			Wild Acre, Top End,	Renhold,Bedford	I,MK41 OLR							
			Church End,Renhold	d,BEDFORD,Sim	shire,MK41 OLU							
			Church Lane,Goldin	gton,BEDFORD,	Simshire,MK41 0PF							
			Harpenden Street V	Ve,Off London R	oad,Goldington,Bedfo	rd,MK41 OTD						
			Honeysuckle Way,B	edford,MK41 0T	F							
			High Street,Bedford	I,MK41 2LK								
			Church Street,Bedf	urch Street,Bedford,MK41 3GH								
			Green Park,Bedford	een Park,Bedford,MK41 5KF								
			[ try a different postcod	le 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	Vay,Bedford,MK41 0TF							
						[Cancel] Cr	reate this address in the existing street above	/e				

- 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	
				Are you rea	ally sure you want to If so, complete all		
			Unique to thi Building number Building name	s address		UPRN	
			Apartment Phone number				Please select
			Shared with	other address	5		
			Street name (1) District/village			Street name (2) Town/city	
			County Postcode	mk41		Country	Please select
				2		]	Cancel ] 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] Process	es People Oper	rations <mark>Utiliti</mark>	<mark>es</mark> Admin		Welcome <b>sysadm</b> i		Help	Change Password	Logout
Address catalogu	e Nearest schools	Bulk print	Job manager	RO import	Budget forecast	Reports	SSRS		
Postcode	Postcode								
Street address	Street address								
	[ cle	ear] Search							
		1	Details 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, Pertshire, 29 0CA				
3, Back Lane, Jackson, Alphatown, Perfshire, Z9 0CA	Details Map & O	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		LA	Please select
9, Back Lane, Jackson, Alphatown, Perfshire, Z9 0CA	Aparation			
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 o	uner 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				[ Gancer] 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.

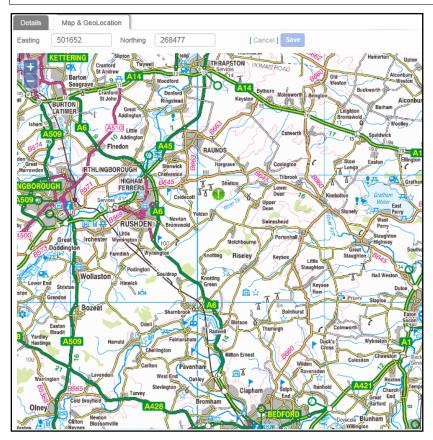
[one]	Processes	People Ope	rations Util	<mark>ities</mark> Admin		Welcome <mark>eysadı</mark>		Help	Change Password	Logout
Addres	s catalogue	Nearest schools	Bulk print	Job manager	RO import	Budget forecast	Reports	SSRS		
Postco	de (	Postcode								
Street	address	Street address								
		[ cl	lear ] Search							
				Details Map	& GeoLocation					

- 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			LA	Please select	
9, Back Lane, Jacks	on, Alphatown, Perfshire	, Z9 0CA	Aparation				- 1 10030 301001 -	
10, Back Lane, Jack	son, Alphatown, Perfshir	re, Z9 OCA	Phone number					
11, Back Lane, Jack	son, Alphatown, Perfshir	re, Z9 OCA						[Cancel] Save
12, Back Lane, Jack	son, Alphatown, Perfshir	re, Z9 OCA	Shared with	other address				
13, Back Lane, Jack	son, Alphatown, Perfshir	re, Z9 OCA	Sharee with t	Strief address				
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 OCA	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						[ Galicel] Save

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] F	Processes People Operations <mark>I</mark>	Jtilities Admin	Welcome sysadmin	Help	Change Password	Logout
Personal in	nfo Driver / assistant info Communic	ations & complaints				
Find the	5  active Schools	No School Selecter	d			
for NCY	All					
whose	any site 🔹					
is nearest	Select an address Q					
by	direct distance					
	[ Centre map on this location ]					
include	only home LA bases					
of type(s)	any base types 👻					
	(Bases within catchment are also included) [Clear] Search					

- 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 address		
Looking for	þ5 <b></b>		×	Search
		Address 💠		
65				
View 1 - 1 of	1		< prev   ne	ext >
			[cancel] Select th	

- 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:

- 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.
- 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 29 and <u>Creating Journeys in Bulk</u> on page 42.

- 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 Ut	ilities Admin		Welcome sysadi		Help	Change Password		Logout
Address	s catalogue	Nearest schoo	ls Bulk print	Job manager	RO import	Budget forecast	Reports	SSRS			
Tickets	Invoices										
Selec	et all	unprinted ticket	ts								
Serial	l prefix	prefix									
Serial	l number	number	to number								
Starti	ing Between	dd/mm/yyyy	and dd/mm/y	уууу							
Contr	ractor(s)				Q. <b>X</b>						
Route	e(s)	route			Q. <b>X</b>						
Ticke	t design	choose ticket d	lesign								
[ marl	k tickets as printe	ed without printing	mark tickets as unprin	ted ]			(	Send tickets	for printing and mark th	em as pi	inted 🔽

- 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 Op	erations <mark>U</mark>	tilities Admin		Welcome sysm	imin I 🔅	Help	Change Password	1	Logout
Address	catalogue	Nearest schools	Bulk print	Job manager	RO import	Budget forecast	Reports	SSRS			
Tickets	Invoices										
Print all ur	npaid invoices wi	th serial prefix	prefix	and serial number be	tween	umber and	number		Send invoid	ces for pr	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	Į	People	Operati	ons	Utilities	Admin			Welcome eysa	dmin	Help	Change F	assword	I D	ogoul
Address	catalogue	Ne	earest schoo	ols I	Bulk print	t Jot	manager	RO imp	ort	Budget forecast	Reports	SSRS				
Show	my jobs ·	•	submitted	in	1 week		•	of type	all typ	es	·	Refre	sh			
0			Descripti	on				Job Type		Status	Progress	Schedul	ed Date 👙	Status	Change	ł
Bulk Tic	ket Processing						Bulk	ssue tickets		Completed	0.0	0 10/03/2017	13:22:37	10/03/20	017 13:22	1:37

- 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.

1001033 00	talogue	Nearest scl	nools	Bulk print	Job manager	RO import	Budget forecast	Reports	SSRS	
Show	ny jobs	• submit	ted in	1 week	•	of type all	l types	•	Refresh	
		Descrip	otion			Job Type	Status	Progress	Scheduled Date 🜲	Status Changed
Bulk Ticket	Processing				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 f	inancial 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 154.

3. Highlight a budget code. The **Budget code** and **Amount** fields are displayed.

SEC SEC	Secondary Transport	0	
SPEC SPEC	Special Transport	0	
SS SS	Social Services	0	
TEST	Test Category	0	
ludget 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 Op	erations <mark>L</mark>	Itilities Admin		Welcome <del>sysada</del>	nin	Help	I	Change Password	Logout
Addres	s catalogue	Nearest schools	Bulk print	Job manager	RO import	Budget forecast	Reports	s SS	RS		
Show bu	idget allocation for	financial year	2016/2017	•		Generate forecast for select	ted codes		as a	a summary of the whole year	r 🔻
Co	de 🔶	Descrip	tion			Amount					
СН	IER	Allowand	ces			0					
ME	Ð	Medical	Transport			0					
PR	I	Primary	Transport			0					
SE	C	Seconda	ry Transport			0					
SP	EC	Special 1	Fransport			0					
SS		Social So	ervices			0					
🗌 ТЕ	ST	Test Cat	egory			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 154.

- 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.

Show budget allocation for financial	year 2014/2014 -	Generate forecast for selected codes	as a summary of the whole year 🔹
Code ≑	Description	Amount	as a summary of the whole year 🛛 🖌
CHER	Allowances	0	including monthly breakdowns
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	

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 yo	bu like to run?
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	< prev   next >
	Run report

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 the <u>One Publications</u> website.

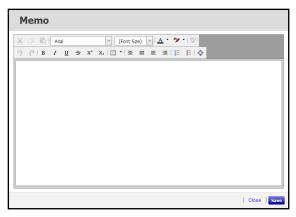
## **Recording Memos**

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 Communio	ations & complaints	3	
Search for	Active people	♣ B	DOB 06/	ID 9048274
	[clear   show all   hide all ] Search	16	(no email address)	[actions 🖤]
Name CTOTO, Ac	DOB PostCode	[Passenger info   P	ersonal info   Driver / assistant info ]	
Az Az	1000	Role details	Checks Training Bases Routes	~
Aa	BALL 1993	Role type	Select role type 🔹	[actions 🛛 ]
Aa		Badge number		Memo +

Location of the Memo button on the People | Drivers/Passenger assistants | Role details screen



Memo dialog

#### Utilities

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.

# **09** 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 Transpo	rt lookups	Budget codes	Configuration
Assessments Journeys & tickets Invoid	es & 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)
a la contra de la co			
✓ 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)
In catchment check			(check whether the base is in catchment when determining entitlement)
Always exclude these	e bases from	nearest schoo	ol 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		
			[ 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.
- 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	✓		(include grants and benefits free school meals in determination of LIF status)
In catchment check			(check whether the base is in catchment when determining entitlement)
Always exclude these	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 ex	cclusion list		
			[ cancel ] Save

3. Click the add a base to exclusion list hyperlink to display the Choose a base dialog.

		Choose a	a base	
Looking for				
LEA	All			
Туре	Туре			
Control	Please s	select		
Active	✓			
				[ clear ] Search
Base N	ame 🔶	School Number	LEA	Base Type
Abbey Middle S	chool	4001	999	JUN
Westfield Middl	e School	4033	999	MID
Showing 1 - 2 o	of 2			< prev   next >
[ view details ]				[ cancel ] Select 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.

Admin

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 threshold	distance		
Journey mileage n	ate		
			[ 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.
- 2. Select the **Invoices & payments** tab. Editable fields related to invoices and payments are displayed.

[one]	Processes	People	Operations	Utilities	Admin		Welcome ays	admin	I	Help	I	Change Password	I.	Logout
Default	values & beha	viours	Transport lookups	Budge	t codes	Configuration								
Assessr	nents Journe	ys & tickets	Invoices & payme	ents Peo	ple roles									
✓ Invo	lice													
Invoice	e prefix													
No. of	invoice due days													
												[	cancel	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 & payments	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.
- 2. 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  Countersignatories for driver/assistant checks	People roles	
Name 🗢	Reference number	^
C C C C C C C C C C C C C C C C C C C	100	~
[ create a new 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	Active people in	this authority		-
Search for	Active beoble ii	runs addronty		-
Name	Any name cha	racters		
Person Id				
Postcode		Туре	Any	•
Base	Select a base			Q. <b>X</b>
Gender	Either			•
UPN				
Date of birth	dd/mm/yyyy			
NCY	All			•
	ι	Jse contains m	atching for na	mes 🗌
		[ clear   show	w all   hide all	] Search
	Name	DOB	Post	Code
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.

Assessments	Journeys & tickets Invoices & payn	nents People roles	
✓ Countersigr	natories for driver/assistant ch	ecks	
	Name 👙	Reference number	
A			~
E			
C C		100	~
	ountersignatory   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 & payment	Peop	ple roles	
> Cour	ntersignatories for driver/assistant check	s		
♥ Surv	eyors			
	Name 👙			
Ju				~
Ki M				
				~
[ create	e new surveyor   delete selected surveyor ]			
Name	Select a person	Q <b>X</b> *		
			[ cancel ] Save	

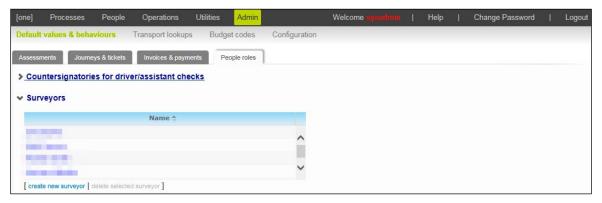
- 4. Select the person that you want to add as a surveyor:
  - a. Click the Name browse to display the Select a person dialog.

	Select a person
Search for	Active people in this authority -
Name	Any name characters
Person Id	
Postcode	Type Any •
Base	Select a base
Gender	Either
UPN	
Date of birth	dd/mm/yyyy
NCY	All
	Use contains matching for names
	[ clear   show all   hide all ] Search
-	Name DOB PostCode
No records to	view < prev   next >
	[cancel] Sele

- 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 sysadmin	Help	Change Password	Logout
Default v	values & behavio	ours T	ransport lookups	Budget	t codes	Configuration				
Vehicles	Invoices	Special tra	ansport needs							
These type	es of vehicle are cu	rrently confi	gured:							
Code 💠		Desc	ription							
CHA1		Chari	ot							
CO45		Coach	h (45 seater)							
CO53		Coach	n							
CO55		Coach	h (55 seater)							
DB95		Doub	le decker 96 seater							
DD72		Doub	le Decker (72 seater	r)						
DD75		Doub	le Decker (75 seate	r)						
DD80		Doub	le Decker (80 seater	r)						
DON1		Donk	ey							
HEL1		Helico	opter							~
[ create a	new type of vehicle	e   delete	selected type of vehicl	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 Ad	min	Welc	ome <mark>sysa</mark> c	lmin	Help	1	Change Password	Т	Logout
Default va	alues & behavi	iours 1	ransport lookups	Budget code	es Config	uration							
Vehicles	Invoices	Special tr	ansport needs										
Three burns	s of vehicle are c												
Code 2	s of vehicle are c		-										
			ription										
CHA1		Chari											~
C045		Coac	n (45 seater)										-
C053													
C055 DB95			n (55 seater) Ie decker 96 seater										
DD72			le Decker (72 seate										
DD75			le Decker (75 seate										
DD80			le Decker (80 seate	r)									
DON1		Donk											~
HEL1		Helio	opter										
[ create a r	new type of vehic	<b>le  </b> delete	selected type of vehic	le ]									
Code			*										
Description				*									
Capacities		(seated)	*	(standing) 🗰		(wheelchairs)		(max with	n max wheeld	hairs)			
											(	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 Admir	1	Welcome eys	admin	Help	Change Password	Logou
Default v	alues & behav	iours T	ransport lookups	Budget codes	Configuration					
Vehicles	Invoices	Special tra	ansport needs							
, childred		oposiai as								
These type	es of vehicle are o	urrently config	gured:							
Code 💠		Desci	ription							
CHA1		Chario	ot							
CO45		Coach	n (45 seater)							
CO53		Coach	ı							
CO55		Coach	n (55 seater)							
DB95		Doubl	le decker 96 seater							
DD72		Doubl	le Decker (72 seater	)						
DD75		Doubl	le Decker (75 seater	)						
DD80		Doubl	le Decker (80 seater	)						
DON1		Donke	еу							
HEL1		Helico	opter							
[ create a	new type of vehi	cle   delete	selected type of vehicle	e ]						
Code	DON1		*							
Descriptio	n Donkey			*						
Capacities	1	(seated)	* 1	(standing) #	(wheelcha	rs)	(max with	max wheelcha	irs)	
										[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	values & behavi	iours T	ransport lookups	Budget	codes	Configura	ation					
Vehicles	Invoices	Special tra	ansport needs									
These rea	asons for issuing a	n invoice are	currently configured:									
Reason	(item) 🔶						Default	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 s	elected invoice reason	]								

 Click the create a new invoice reason hyperlink. Editable fields related to invoice reasons are displayed.

[one] Processes	People	Operations	Utilities	Admin		Welcome	sysadmin	T	Help	I	Change Password	- I	Logout
Default values & beha	viours T	ransport lookups	Budget	codes	Configuration								
Vehicles	Special tra	insport needs											
These reasons for issuing	an invoice are o	currently configured:											
Reason (item) 💠					Defa	ult amount (i	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 real	ason delete se	elected invoice reason	]										
Reason for invoice					*								
Default amount			(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 32.
- 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 & behav	riours	Transport lookups	Budget	codes Co	onfiguration						
Vehicles	Invoices	Special t	ransport needs									
These rea	isons for issuing a	in invoice are	e currently configured:									
Reason	(item) 💠					Defa	ult amount (if	any)				
Damage												
Invoice	for 1995/1996											
Invoice	for 1996/1997											
Invoice	for 1997/1998											
	for 1998/1999											
	for 2000/2001											
Invoice	for 2001/2002											
[ create	a new invoice reas	son   delete	selected invoice reasor	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.

[ create a new ty	create a new type 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	gured :	
Code	Description			
ESCO	Escort			
HARN	Harness			
MTA	Must Travel Al			
ото	One to One Es	cort		
SEAT	Special Seat			
WHEE	Wheelchair			
f annala an	and the of sources	delete selected type of need		
[ create a l	new type of need (	delete selected type of field	11	
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 63.

## **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				
					[cancel] Save

- 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	We	elcome			Help	Change Password	Logout
Default	values & behavio	ours	Transport lookups	Budget	codes	Configuration						
Site	Configuratio	n										^
♥ Data	base Configu	ration										
Server			OM362	AAA								
User in			onemxe	64								
Passw	ord		Enter P	assword (Le	eave empty	to retain existing passwore	i)					
Confin	m Password		Confirm	Password				Tes	t			

- 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	aysadmin	1	Help	T	Change Password	1	Logo
Default	values & behav	iours	Transport lookups	Budget	codes	Configuration								
Site	Configuratio	on												
> Dat	abase Configu	iration												
❤ Aut	hentication													
Open	ID provider		https://	ONE-VM201	2APP/CCS	OpenIDProvider_362A	AA/user	Tes	t					

- 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		Welcome		Help	Change Password	Logout
Default	values & behavi	ours	Transport lookups	Budget cod	les <mark>Cor</mark>	nfiguration					
Site	Configuratio	n									^
> Data	abase Configu	ration									
> <u>Aut</u>	hentication										
🗸 Cap	ita One V4										
Applic	ation server		https://	ONE-VM2012AF	PP/CCSAppli	cationserver_3	62AAA	Test			
Sessi	on server		https://	ONE-VM2012AF	PP/CCSSessi	ionServer_362	AAA	Test			
Online	eserver		https://	ONE-VM2012W	EB/CCSOnlir	ne_362AAA/de	fault.aspx	Test			
Repor	t server		https://	ONE-VM2012R	PT/ccsreports	server_362AA	A	Test			

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 the <u>One Publications</u> website.

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 the <u>One</u> <u>Publications</u> website.

- 1. Select the Admin area and select the Configuration tab.
- 2. Open the **GIS Configuration** section. Editable fields related to GIS are displayed.

✤ GIS Configuration		
Tile Width	256	
Tile Height	256	
Tile Server Link Pattern	http://cssbedora4:8080/tilecachewsgi/	Test
BBox Bottom LeftX	400000	
BBox Bottom LeftY	150000	
BBox Top RightX	600000	
BBox Top RightY	350000	
Tile Protocol Type	TMS	
Default Zoom	4	
Minimum Zoom	1	
Maximum Zoom	20	
Map Parameters	Enter Map Parameter	
Layer Parameters	Enter Layer Parameter	
WMS Layer Options	Enter WMS Layer Options	
HMS Route Service	http://10.128.39.48/ccsgisapi/routing.asmx	Test
Ordnance 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 the <u>One Publications</u> website.

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> <u>2.13.1/doc/apidocs/files/OpenLayers/Layer/TMS-js.html</u>.

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> <u>2.13.1/doc/apidocs/files/OpenLayers/Layer/WMS-js.html</u>

```
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
- matrixIds EPSG:27700:0, EPSG:27700:1,....,EPSG:27700:25

- matrixSet EPSG:27700
- name WMTSMap
- **opacity** 10
- tilecol 1
- tilerow 4
- tilematrix EPSG:27700
- 6. 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 the <u>One Publications</u> website.

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**

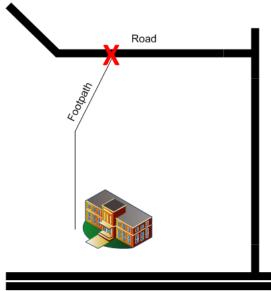
The distance calculation parameters can be used to configure how One behaves when calculating distances in certain scenarios. These parameters are configured in v4 Online via **Administration | System Administration | System admin | System defaults**, rather than through One Transport itself.

#### 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	int	Welcome SYSADMIN   Help   Legost
SQL Mail Merge Performance Diagnostics Syst	em Administration	
	Mo Query Selected	🗙 Delete 🥒 Edit. 📮 Wide Mew
Query Name	Context:	Active: NotSet
Nore Options Clear Search Search	SQL Users User Groups	
+ Add New Query		
Query Name Context		

2. Click the System Administration hyperlink to display the System Administration page.

[one] System admin Data management		Welcome SYSADMIN   Help   My Account	
	Welcome to the Capita ONE Syst Click on any menu item above to learn above Hover over a menu item and click on a sub-menu to	ut its features.	
	Copyright @ 2015 Cepita. All rights reserved, wor Version 4.358.0.57666	dwide.	

3. Select the System admin | System defaults hyperlink to display the System defaults page.

Syste	em def	aults		
Filter				
Parameter	code	Description	Parameter value	
ACT_FILTE	R	From day activities	7	
ADDR_DAT	A	Edit value-added address data?	F	
ADDR_NAM	Æ	Addressee Name value	S	~
ADDD ST 1	DF.	Import Street Description? T/F	т	
Code	ACT FILTER			
Description	From day a			
D. C. S. C.	7			

- 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.

Processes	People	Operations	Utilities	Admin		Welcome <b>sysadmin</b>	Help		Change Password		Logou
values & behavio	ours T	ransport lookups	Budget	codes	Configuration						
Configuratio	n										
entication											
ita One V4											
Configuration											
ad Configurati	on										
um file size can be	uploaded (in	КВ) 51200									
	values & behavior Configuratio base Configur entication ta One V4 Configuration ad Configuratio	values & behaviours T Configuration base Configuration entication ta One V4 Configuration ad Configuration	Values & behaviours Transport lookups Configuration base Configuration entication ta One V4 Configuration ad Configuration	values & behaviours Transport lookups Budget . Configuration base Configuration entication ta One V4 Configuration ad Configuration	values & behaviours Transport lookups Budget codes Configuration entication ta One V4 Configuration ad Configuration	values & behaviours Transport lookups Budget codes Configuration Configuration base Configuration entication ta One V4 Configuration ad Configuration	values & behaviours Transport lookups Budget codes Configuration Configuration entication ta One V4 Configuration ad Configuration	values & behaviours Transport lookups Budget codes Configuration Configuration entication ta One V4 Configuration ad Configuration	values & behaviours Transport lookups Budget codes Configuration Configuration entication ta One V4 Configuration ad Configuration	values & behaviours Transport lookups Budget codes Configuration Configuration entication ta One V4 Configuration ad Configuration	values & behaviours Transport lookups Budget codes Configuration Configuration entication ta One V4 Configuration ad Configuration

- 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 sysadm		Help	Change Password	Logout
Default	values & behavio	urs Tra	ansport lookups	Budget	codes	Configuration					
Site (	Configuration	n									
> Data	base Configur	ation									
> Auth	entication										
> Capi	ta One V4										
> GIS	Configuration										
>Uploa	ad Configurati	on									
Maxim	um file size can be	uploaded (in h	(B) 51200								
<b>v</b> SSRS	Configuration	n									
SSRS	Server		https://	ONE-VM201	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	eysadmin	1	Help	1 0	Change Password	1	Logout
Default	values & behavio	ours Tra	ansport lookups	Budget coo	des <mark>Conf</mark>	iguration								
Site	Configuratio	n												
> Dat	abase Configu	ration												
> Aut	hentication													
> Cap	oita One V4													
> GIS	Configuration													
>Uplo	oad Configurati	on												
Maxir	num file size can be	uploaded (in F	KB) 51200											
> <u>ssr</u>	S Configuratio	<u>n</u>												
<b>v</b> Perf	ormance Monit	or Config	uration											
Enab	le MiniProfiler													
											[R	eset ] 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.

#### Admin

42 Elmsmere Road, Manchester,	Address			
Abbey Middle School	Wayside	End date	dd/mm/yyyy	
Abbey Middle School (West)	Base			[cancel] Save
Abbey Mige School	Base			
Aberdo Preparatory School	Base			
Abray 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	< prev   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 1	5:36:17 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
374.3 ms	Render partial: LinkedDocumentPopUp	10.1
	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 <	prev   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.

[one]		People	Operations	Utilities	Admin		Welcome W Lawren		Help		Change Password	gout
Default va	alues & beha	viours T	ransport lookups	Budget c	odes	Configuration	Route network configu	ratio	n			
These route	e networks are o	urrently config	ured:									
Network	Index	, ,	Name				Description				Line Colour	
0	Dire	t			Dire	ct Route				_		_
1	Drivi	ng			Driv	ing Route				-		_
2	Walk	ing			Wall	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	1
			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 passenger	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 /	Bases	RECORD_ID	Number	
	assistant info	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 the <u>One Publications</u> website.

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 is able to 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 &	Administration	View values for parameters and bases in base list	Yes	NA	NA	No
Utilities		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
TICKELS		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</b> , <b>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 <b>Loading</b> 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: <b>Print invoices</b> , <b>Bulk Print</b>   <b>Invoice</b>	Yes	NA	NA	No
	Invoice Passenger	View invoice	Yes	Yes	Yes	No
	rassenger	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	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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