oneeducation

Transport Back Office

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Handbook

CAPITA

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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 *Creating an Individual Assessment* on page *17*.

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.

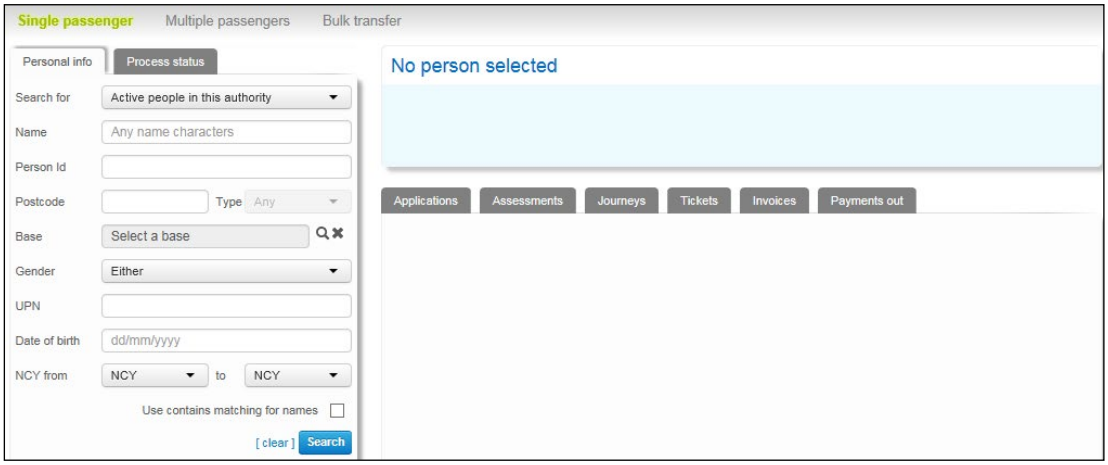
You can use the **Process status** tab to search for:

- 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 One Publications 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.



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.*

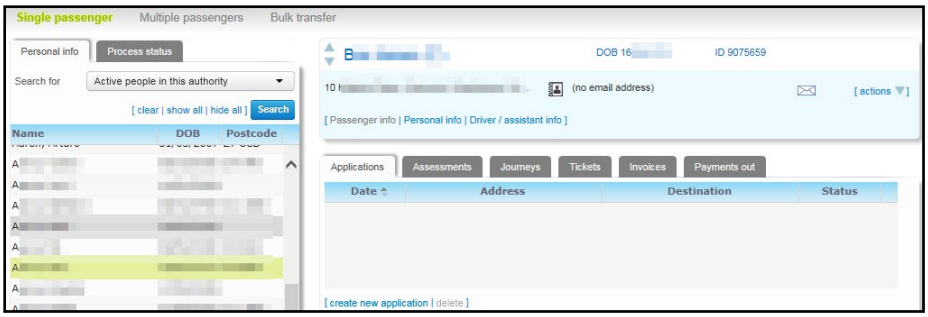
For more information on defining a passenger's home LA, see Recording Status Details on page 60.

   - **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.

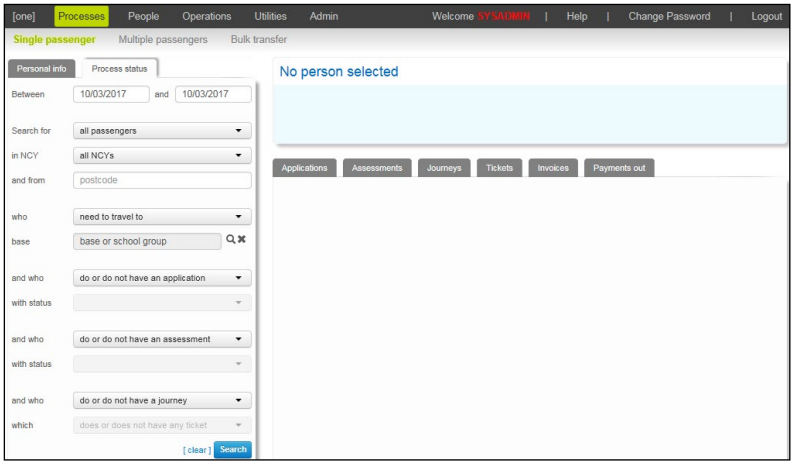
NOTE: *Click the **export** hyperlink at the bottom of the list to export the returned search results into a spreadsheet file.*

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



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.



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 Processing Passengers in Bulk 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**.

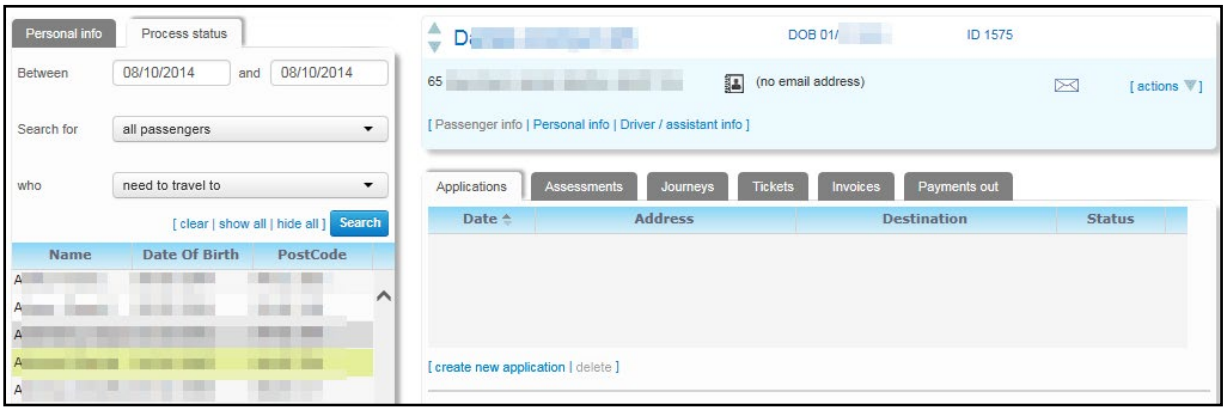
7. Enter an assessment status:
   a. Select an option from the assessment section's **and who** menu. The available options are **do or do not have an assessment**, **do have an assessment**, **do have an issued assessment** and **do not have an assessment**.
   b. If you selected either **do have an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

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

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

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

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

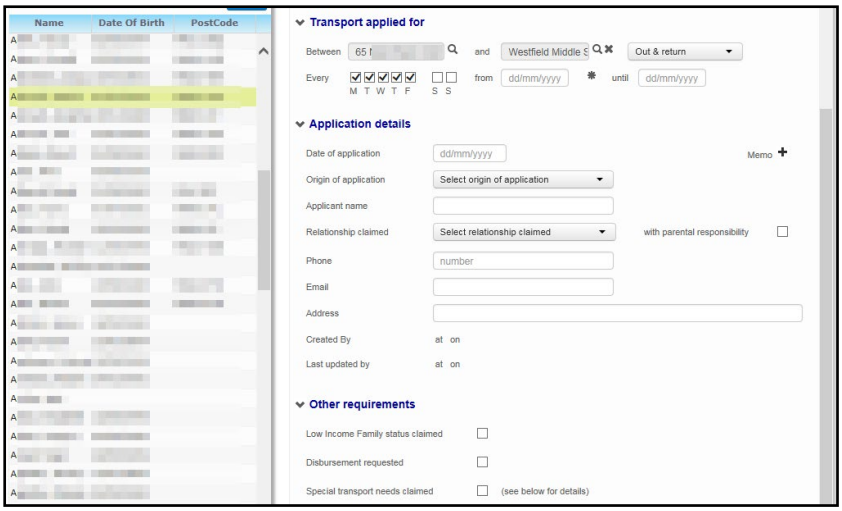


Creating an Application

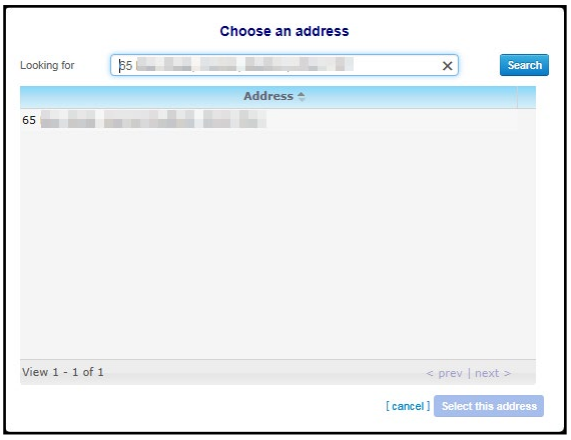
Applications can be created by parents and guardians directly from the Citizen Portal. Once One has matched a Citizen Portal transport application to the correct One Transport passenger, the details of that application show up in that passenger's **Applications** tab.

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

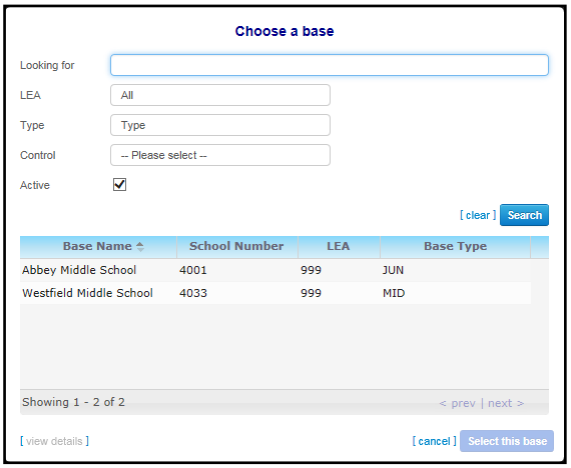
1. Select a passenger. For more information on selecting a passenger, see Selecting a Passenger to Process on page *11*.
2. Ensure that the **Applications** tab is selected.
3. Click the **create new application** hyperlink to display editable fields relating to applications.



4. Select the requested start address:
   a. Click the **Between** 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 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.



e. Enter search criteria for the destination address and then click the **Search** button to view a list of matching bases.

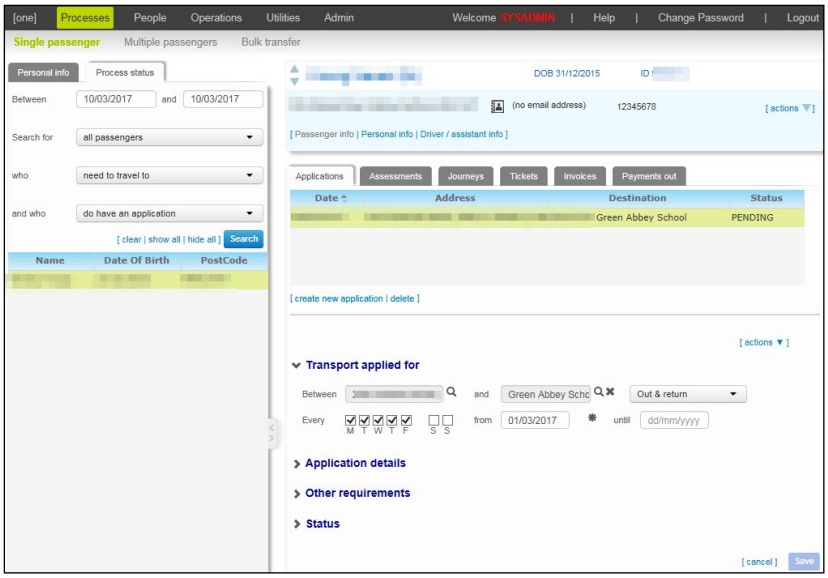
f. Highlight the destination base and then click the **Select this base** button to select the base and close the dialog.

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 Selecting a Passenger 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 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 drop-down menu.

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.

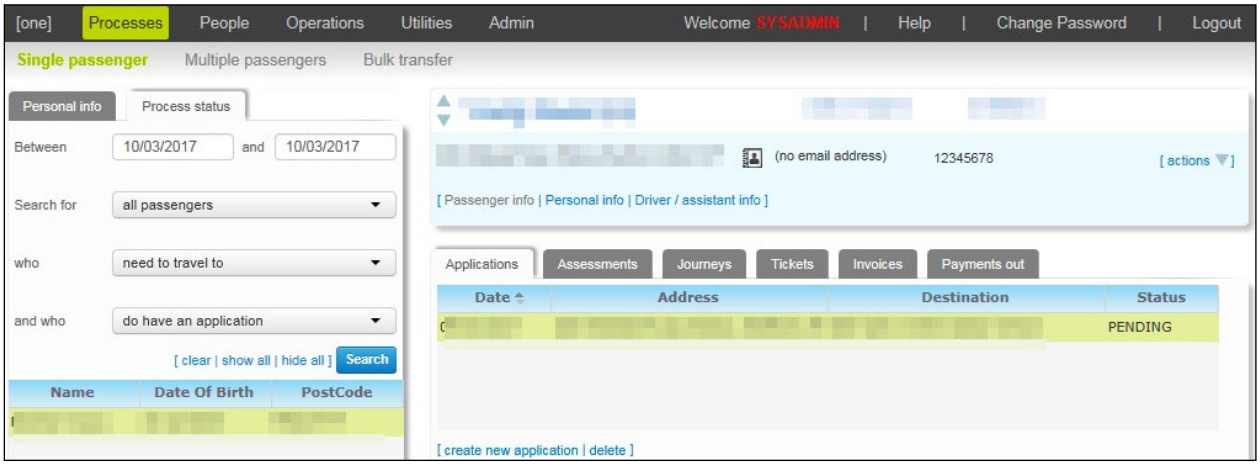
> ***NOTE: From** and **Until** dates do not need to correspond to the dates requested on the application. You can approve or reject a sub-period of the application by entering different dates to those requested.*

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 One Publications website.*

Deleting an Application for Transport

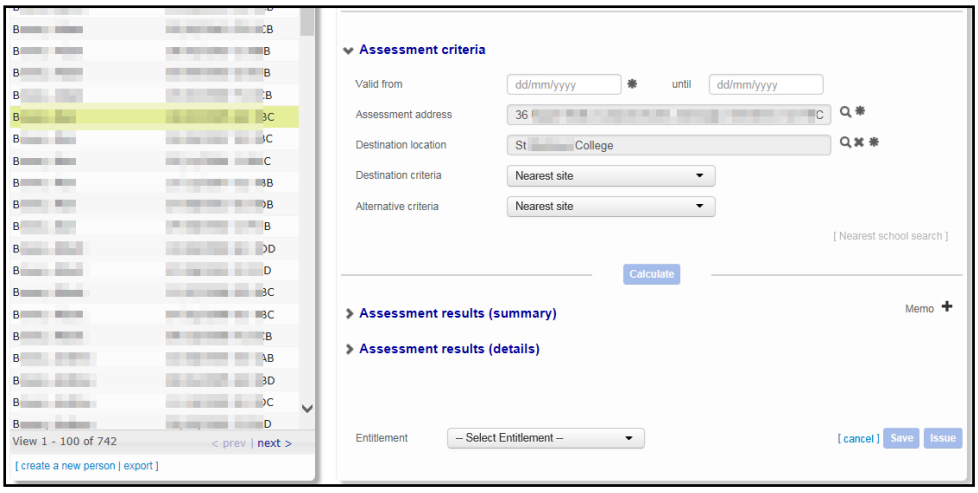
1. Select a passenger. For more information on selecting a passenger, see Selecting a Passenger to Process on page *11*.
2. Ensure that the **Applications** tab is selected. A list of that passenger's applications is displayed.
3. Highlight the application you want to delete.



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

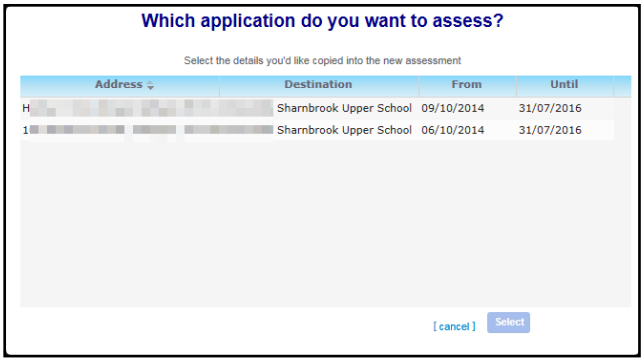
Creating an Individual Assessment

1. Select a passenger. For more information on selecting a passenger, see Selecting a Passenger to Process on page *11*.
2. Select the **Assessments** tab.
3. Click the **create new assessment** hyperlink to display editable fields related to assessment details.

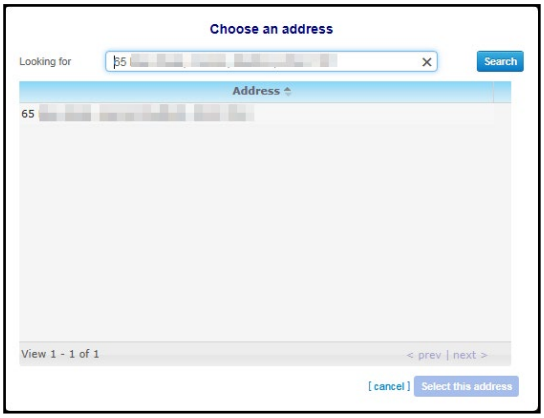


If the selected passenger has a pending application, that application's address, destination and date details are copied automatically into the new assessment.

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.



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.

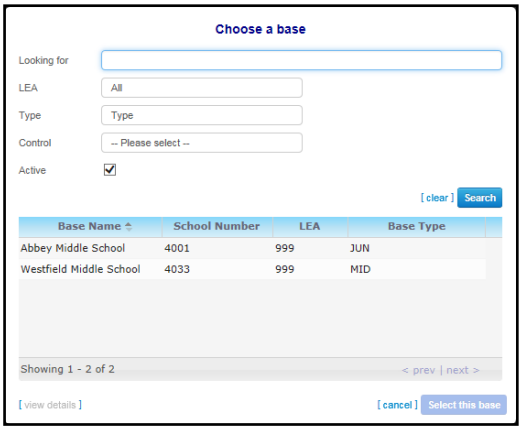


   b. Enter a postcode or address line into the search bar and then click the **Search** button to display matching addresses.

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.



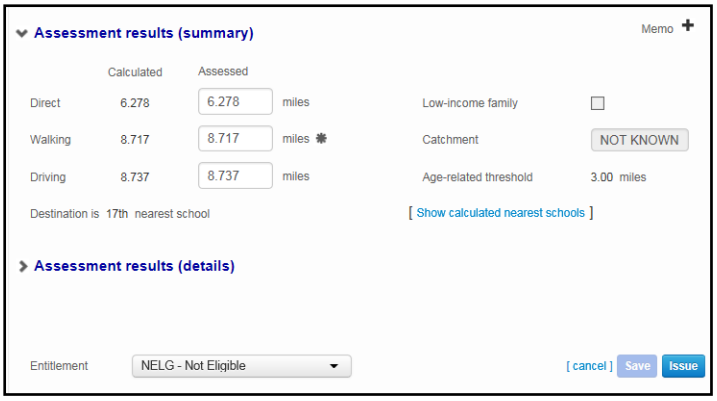
b. Enter search criteria into the available fields and then click the **Search** button to display matching addresses.

c. Highlight an address and then click the **Select this base** button to select the address as the destination location and close the dialog.

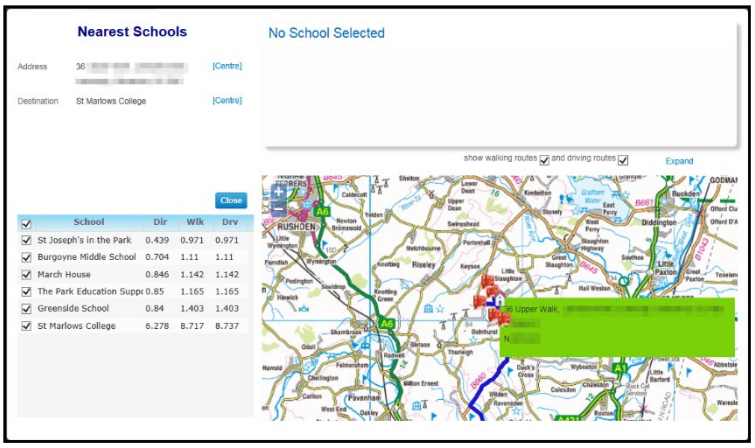
8. Select criteria from the **Destination criteria** and **Alternative criteria** menus as required.

> ***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.



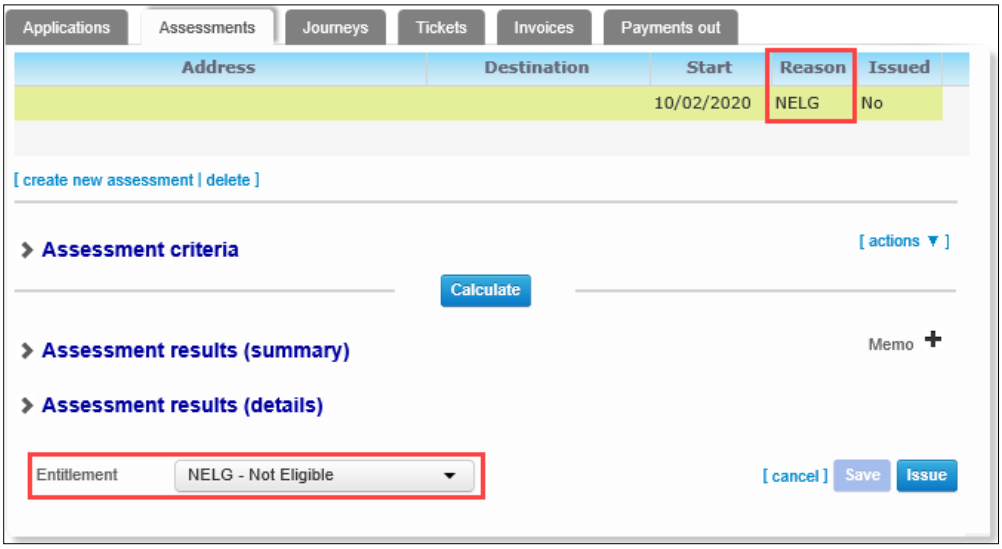
10. If required, click the **Show calculated nearest schools** hyperlink. The **Nearest Schools** dialog displays, showing the five nearest schools to the selected passenger's address. Select a school's name in the list to highlight that school's location on the map. You can alter the map display using 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.*

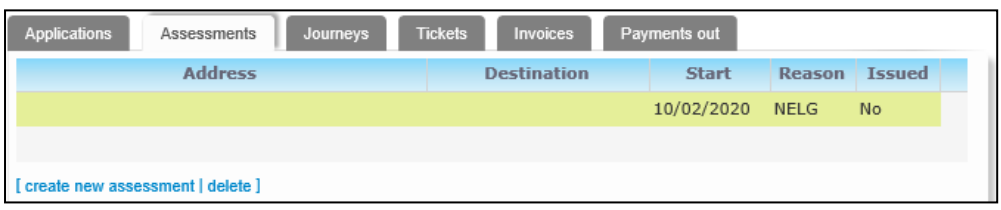
11. Select one of the following options:
    - Click the **Save** button to save the assessment without issuing it.
    - Click the **Issue** button to issue the assessment.
    - Click the **cancel** hyperlink to discard the assessment.

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.*



Deleting an Assessment

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



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

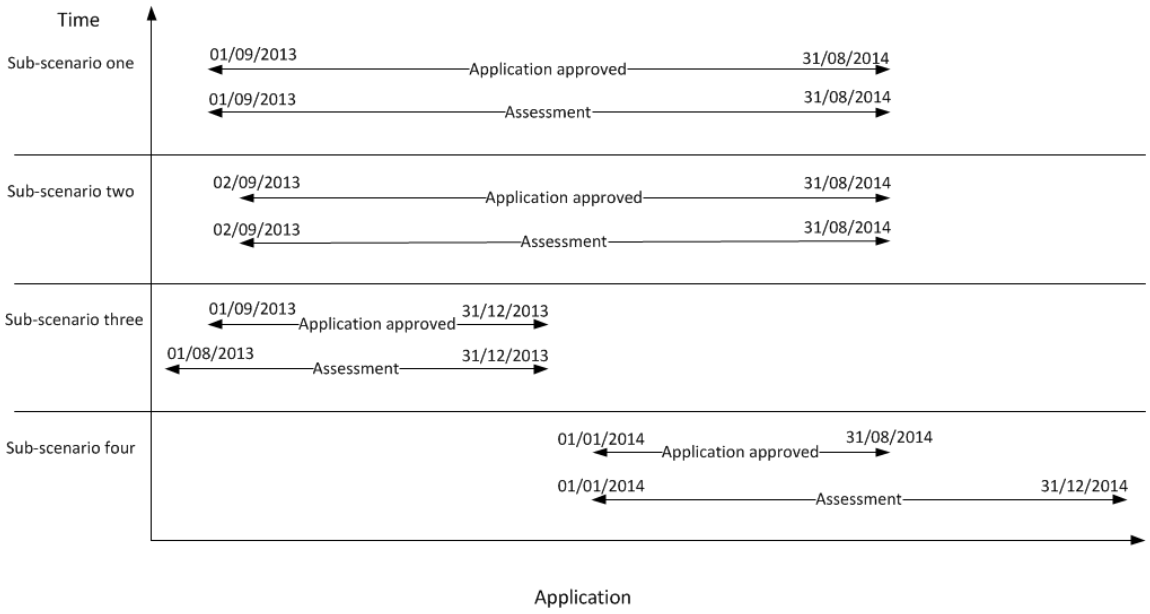
One Transport provides controls to help you deal with applications and assessments whose dates overlap.

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**.



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.

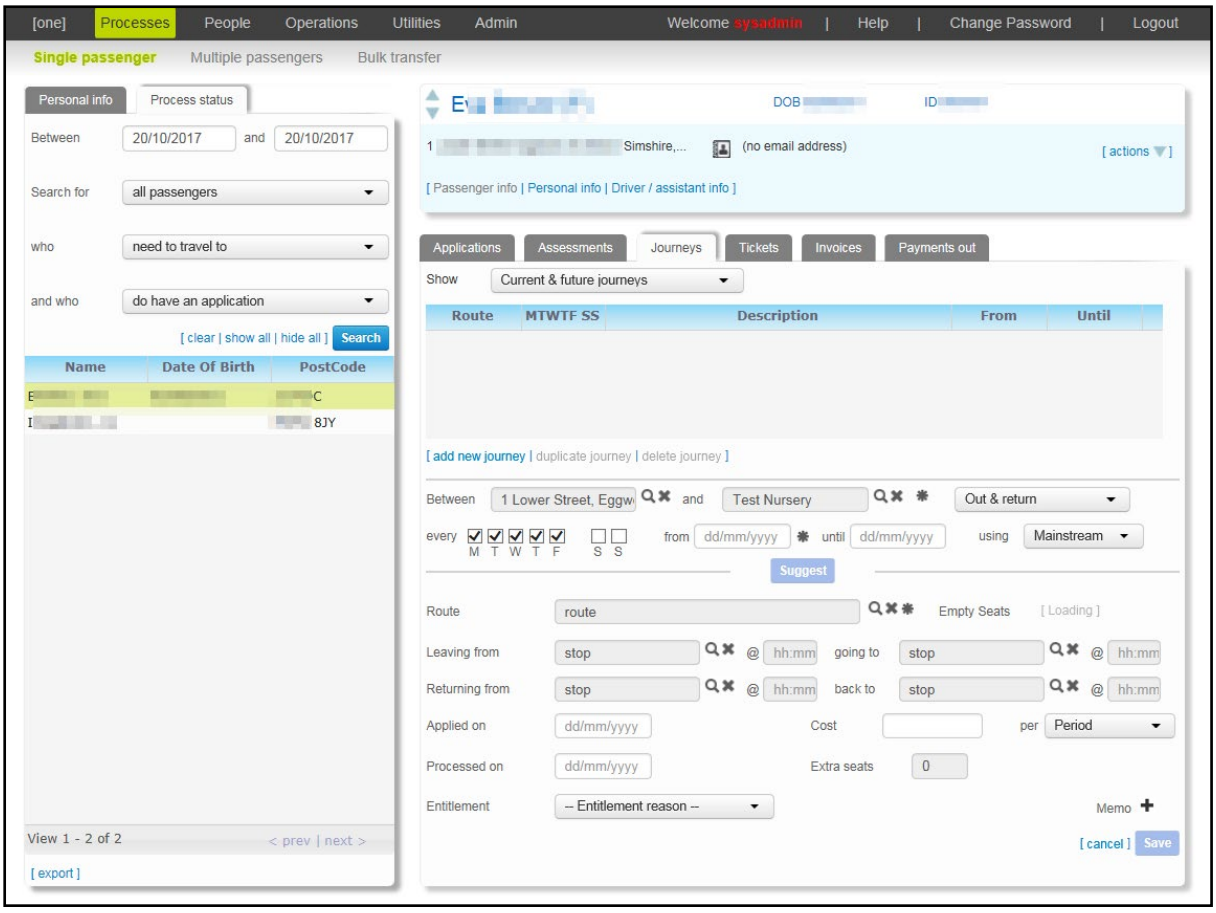
On a door-to-door route, the LA supplies transport to pick up a passenger at a specific address or stop and then take that passenger to another address or stop.

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.

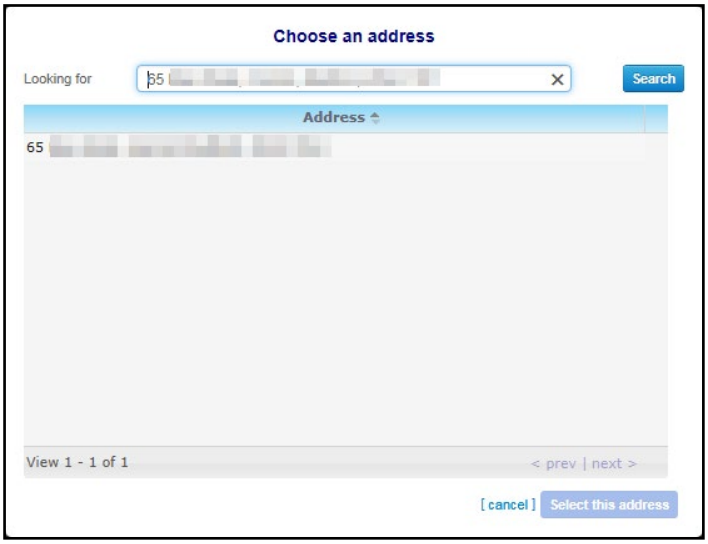
If an LA is unable to provide transport to a student at a reasonable cost, it may choose to pay a carer to supply suitable transport. One Transport provides an outgoing payments function to assist with this process.

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.

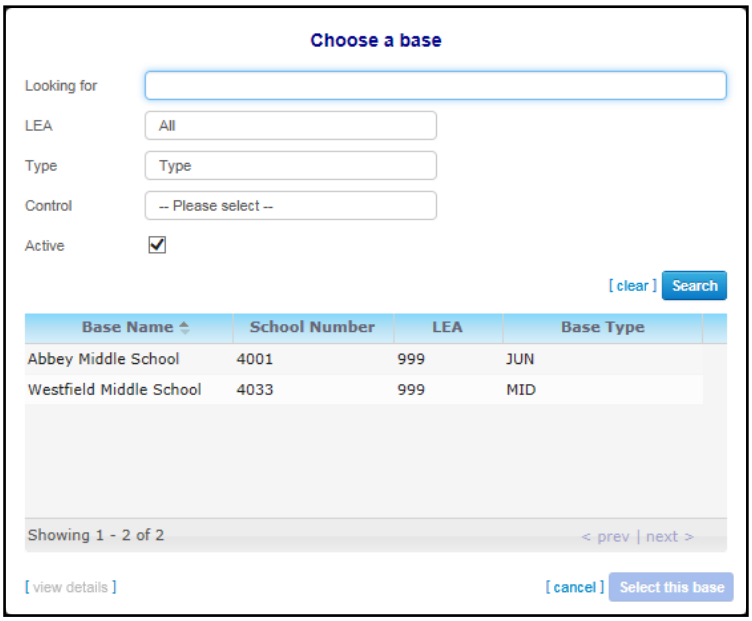
1. Select a passenger. For more information on selecting a passenger, see Selecting a Passenger to Process on page *11*.
2. Select the **Journeys** tab.
3. Click the **add new journey** hyperlink to display editable fields related to journey details.



4. If required, change the start address for the journey:
   a. Click the **Between** 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 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.



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 One Publications website.*

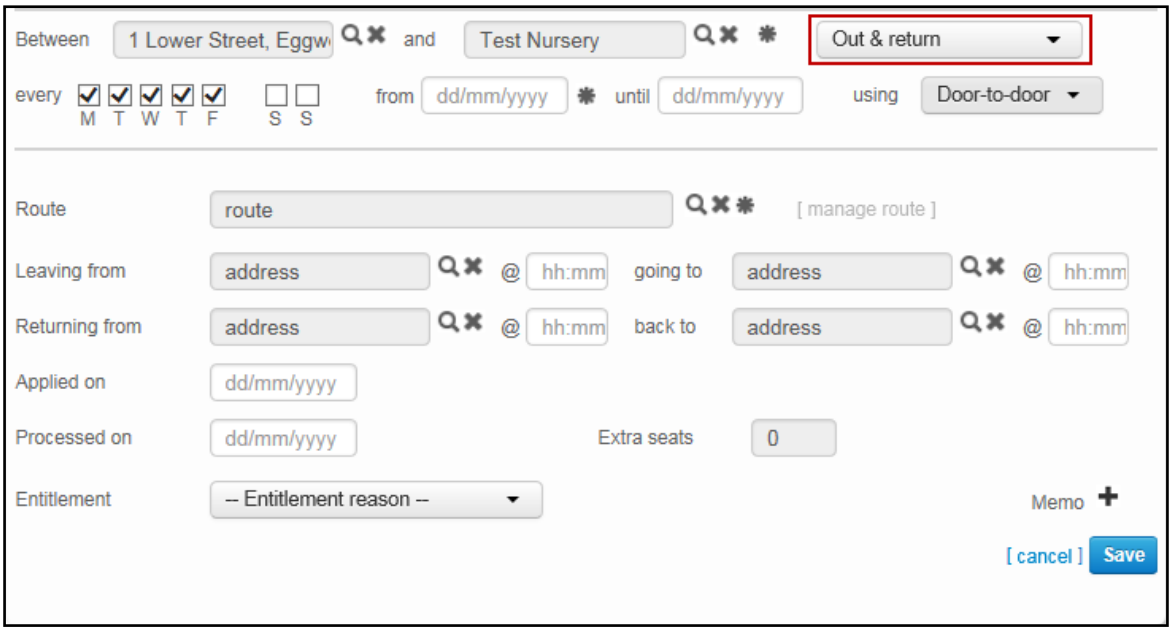
   a. If required, enter valid dates into the **Applied on** and **Processed on** fields.

   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:

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



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:

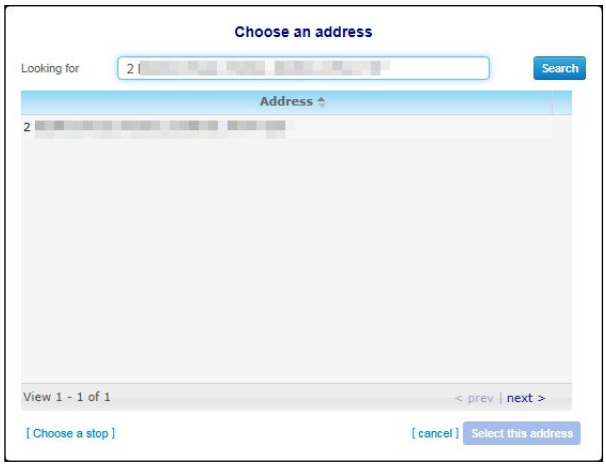
   i. Click the **Route** browse to open the **Select an existing door-to-door route** dialog.

   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.



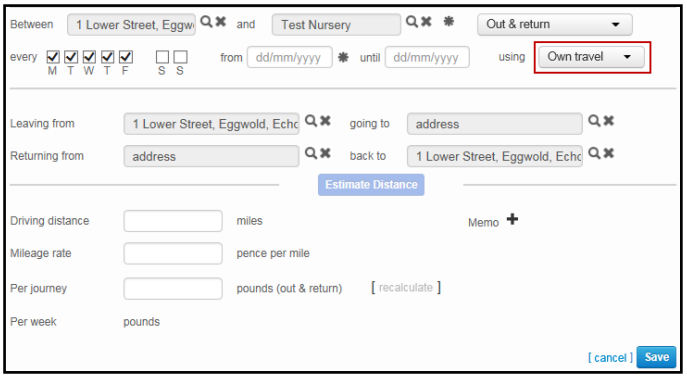
   - To select a stop as the start or end point of the journey, click the appropriate browse button to display the **Choose an address** dialog, then click the **Choose a stop** hyperlink to display the **Choose a stop** dialog. Use the search fields to select a stop from the list.

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.

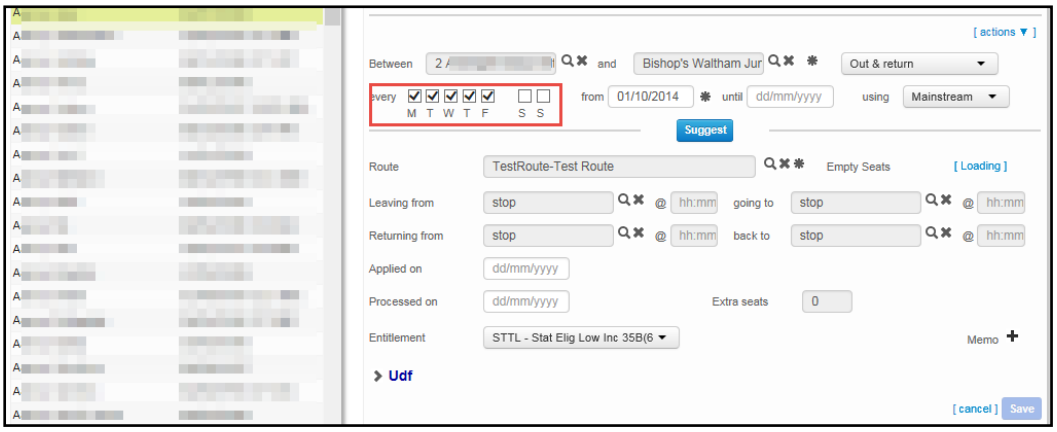
This information was not mandatory in v3, meaning that some journeys that were created in v3 may not have their days of the week recorded. By default, One Transport assigns the days Monday through to Friday to these journeys during migration, meaning that these journeys have Monday to Friday selected 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 Selecting a Passenger to Process on page *11*.
2. Select the **Journeys** tab.
3. Highlight a journey and then select the desired journey frequency using the **every** check boxes.

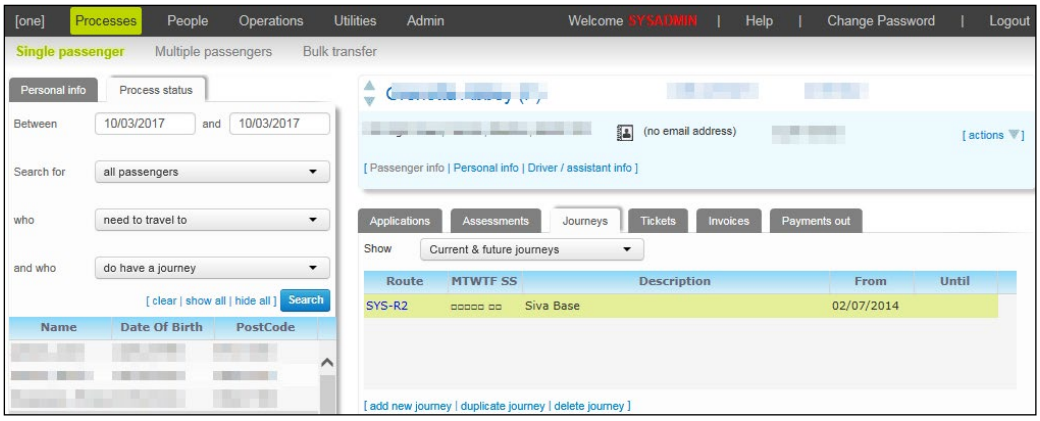
> ***NOTE:*** *You cannot select days that are outside of the frequency defined for the route. For more information on editing route frequency, see Editing a Route on page 92.*



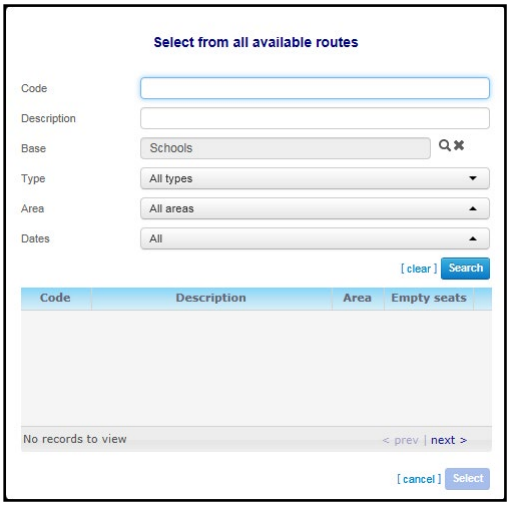
4. Click the **Save** button.

Duplicating a Journey

1. Select a passenger. For more information on selecting a passenger, see Selecting a Passenger to Process on page *11*.
2. Select the **Journeys** tab.
3. Highlight the journey you want to duplicate.



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



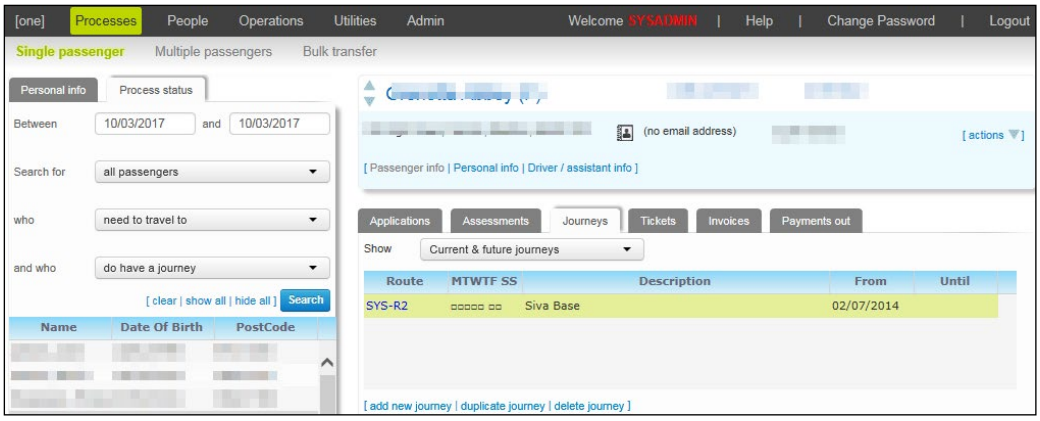
5. Select the route that you want to duplicate the journey to:
   a. Enter search criteria for the route that you want to duplicate the journey to and then click the **Search** button.
   b. Highlight the route you want to use and then click the **Select** button to select the route and close the dialog.
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 Selecting a Passenger to Process 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.



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

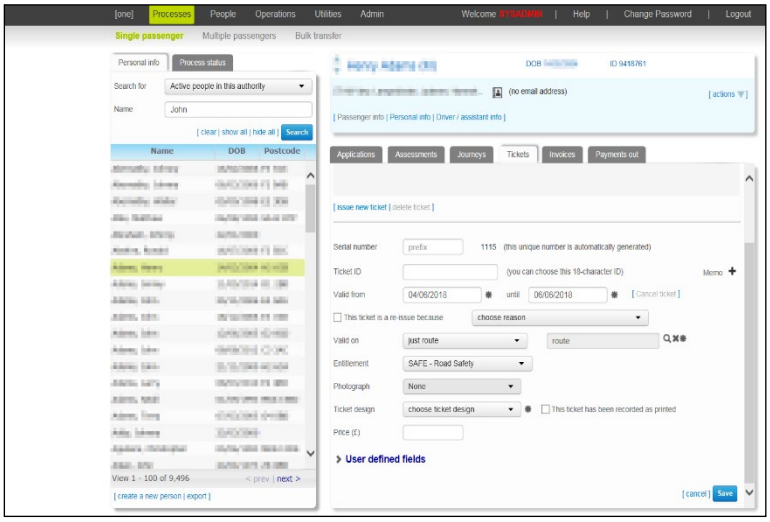
Creating a Ticket

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.

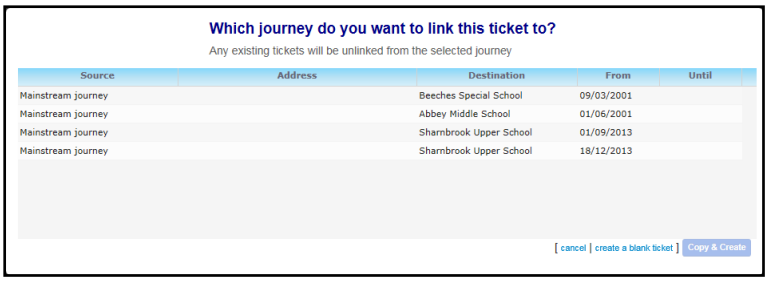
Likewise, passenger journeys can be either ticketed or unticketed. A ticketed journey is a journey that has a linked ticket, while an unticketed journey does not. However, unticketed journeys can still be valid for travel, as the passenger may use a contractor or route-linked ticket. Door-to-door journeys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



- 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.*

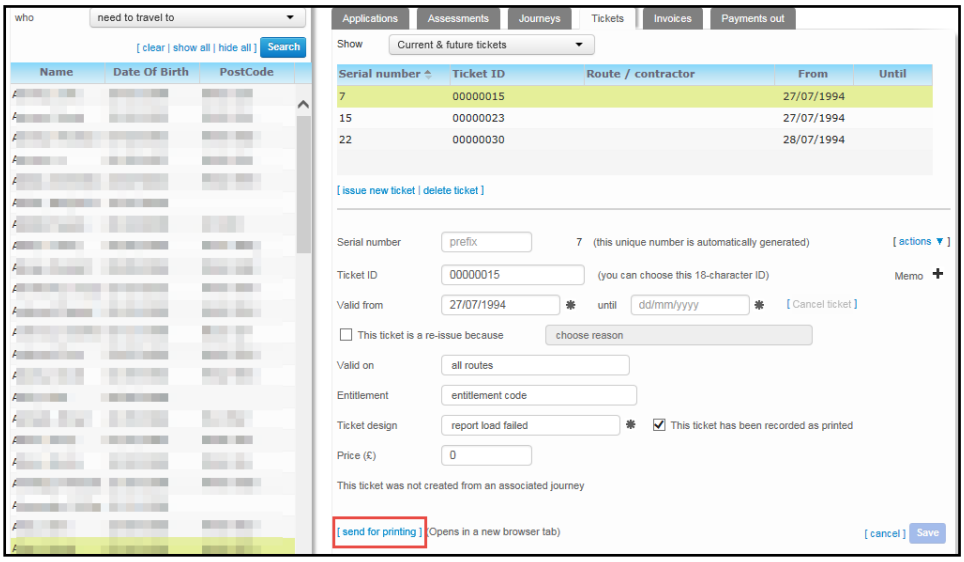
10. Select the passenger's **Entitlement** from the menu.
11. If required, select the **Photograph** of the child to be displayed on the ticket.
12. Select the **Ticket Design** you want to use.
13. Enter a **Price** for the ticket.
14. If required, select the **This ticket has been recorded as printed** 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.*

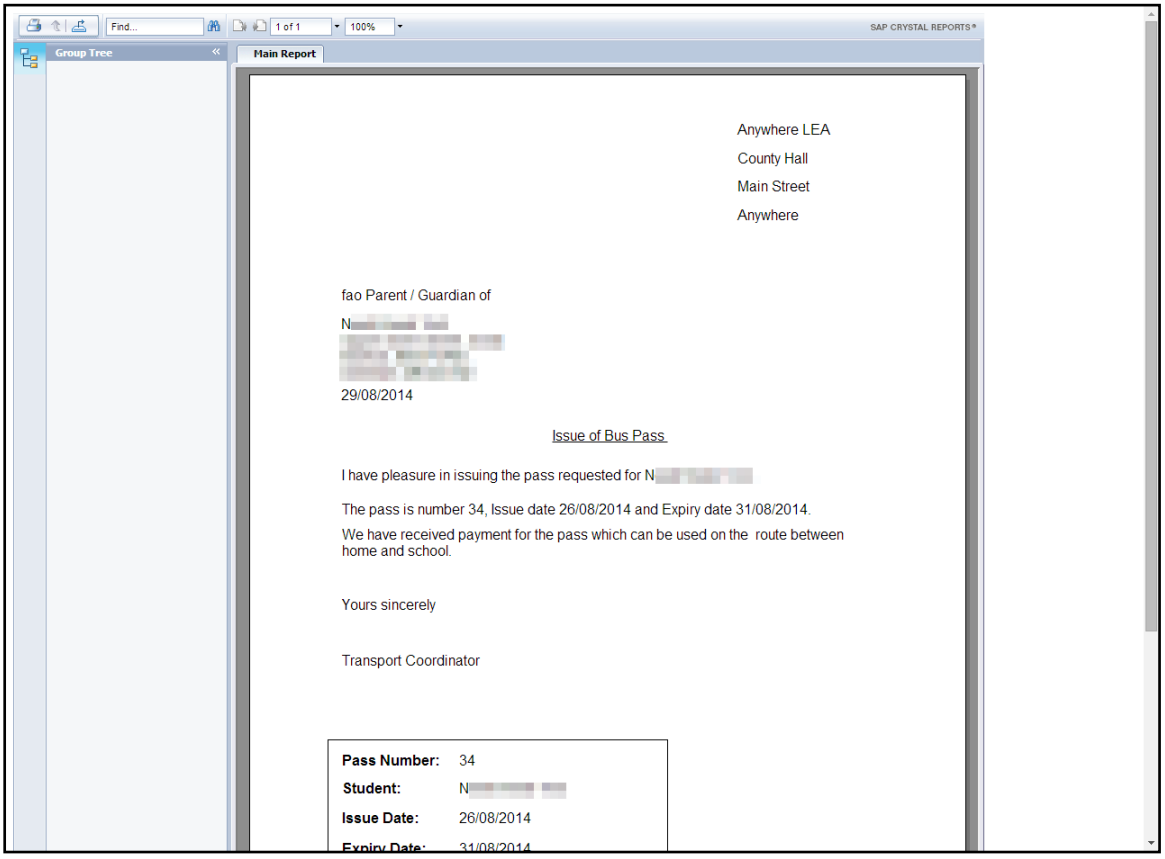
Printing a Ticket

1. Select a passenger. For more information on selecting a passenger, see Selecting a Passenger to Process on page *11*.

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



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.

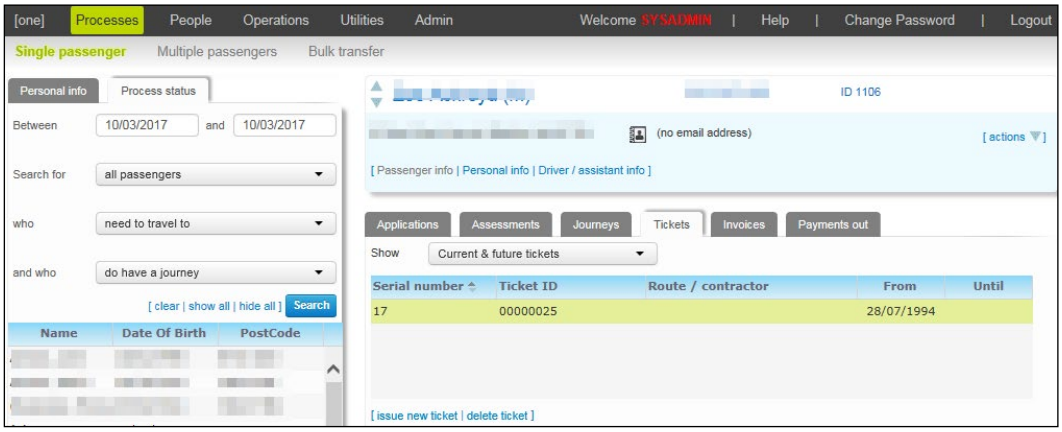


4. Click the printer icon to print the ticket. An entry is made in the entity history to show that the ticket was printed.

Deleting a Ticket

1. Select a passenger. For more information on selecting a passenger, see Selecting a Passenger to Process on page *11*.
2. Select the **Tickets** tab.

3. Highlight the ticket you want to delete.

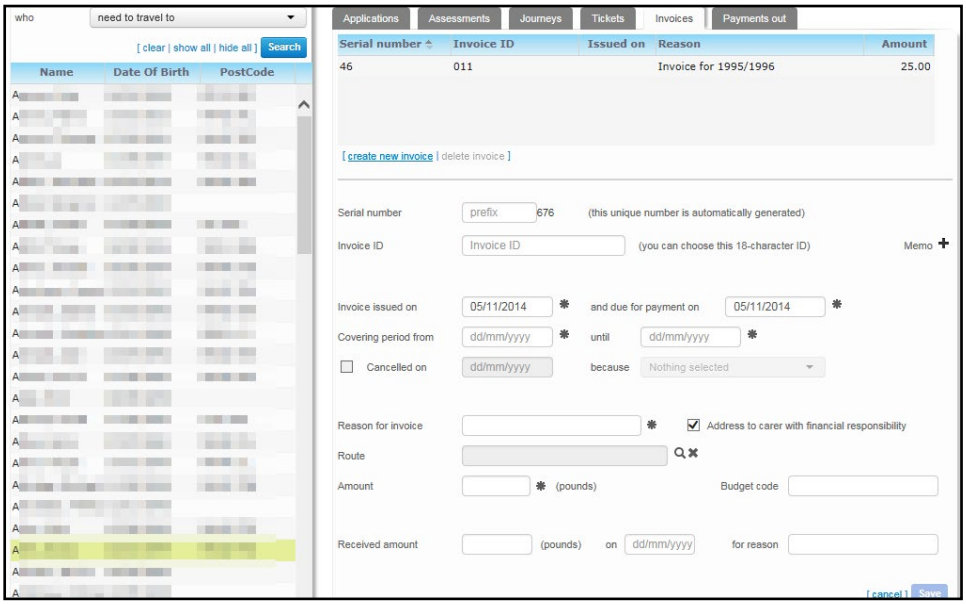


4. Click the **delete ticket** hyperlink. A warning dialog is displayed.
5. Click the **Delete** button to delete the ticket.

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 Selecting a Passenger 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.

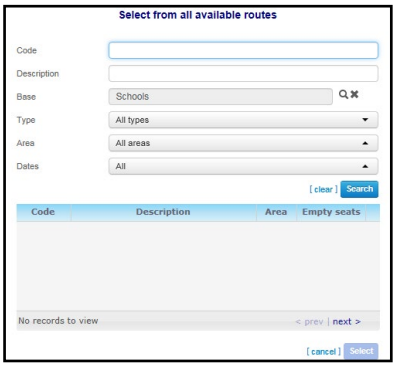


4. If required, enter a **Serial number prefix** field and **Invoice ID**.
5. Enter **Invoice issued on** and **due for payment on** details as required.

> ***NOTE:*** *You can configure the* ***Serial Number*** *field's default value. For more information on configuring default values for invoices, see* *Configuring Default Invoice Settings on page 146.*

6. Enter valid dates into the **Covering period from** and **until** fields.

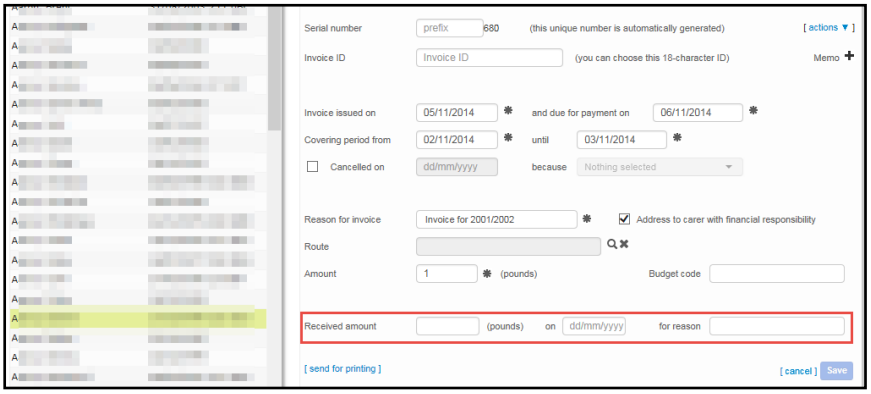
7. If the invoice has been cancelled, check the **Cancelled on** box. Enter a cancellation date and select a reason from the **because** menu.
8. Select an invoice reason from the **Reason for invoice** drop-down menu.
9. If required, select the **Address to carer with financial responsibility** check 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.



    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

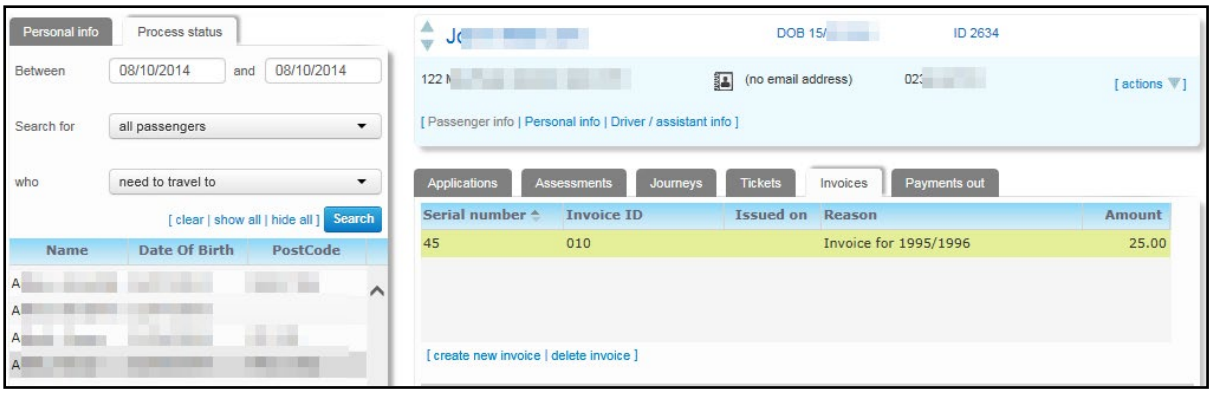
1. Select a passenger. For more information on selecting a passenger, see Selecting a Passenger to Process on page *11*.
2. Select the **Invoices** tab. A list of the passenger's current invoices is displayed.
3. Highlight the invoice you want to record payment for. Editable fields relating to that invoice are displayed.



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

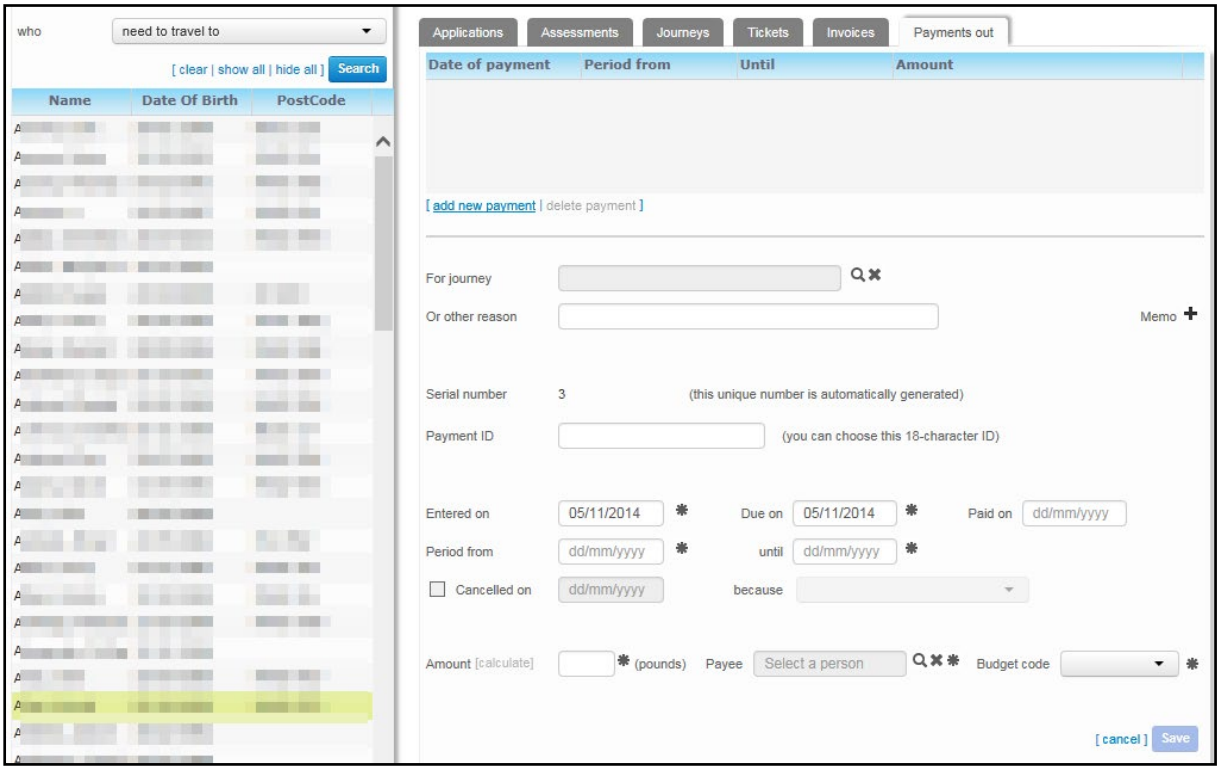
1. Select a passenger. For more information on selecting a passenger, see Selecting a Passenger to Process on page *11*.
2. Select the **Invoices** tab. A list of the passenger's current invoices is displayed.



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.

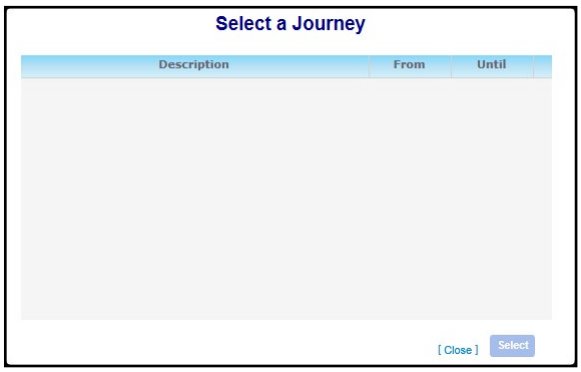
Creating a Passenger Payment

1. Select a passenger. For more information on selecting a passenger, see Selecting a Passenger to Process 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.



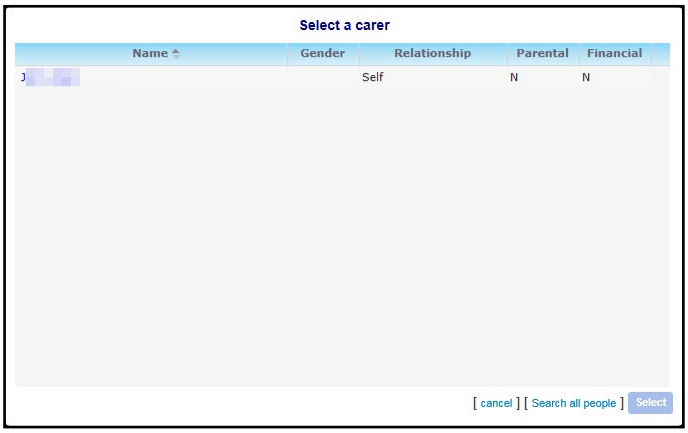
4. Select a reason for the payment. You can select payment reasons in two ways:

- 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.

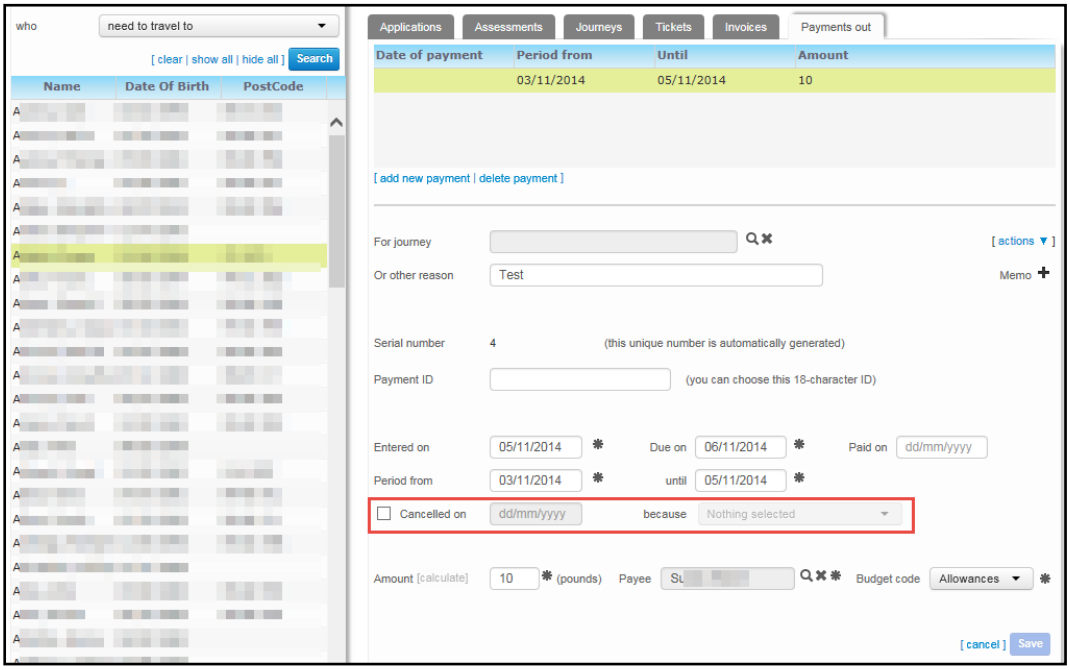


   b. Highlight the carer you want to make the payment to.
   c. Click the **Select** button to select the payee and close the dialog.
9. To search for people who are not carers, click the **Search all people** hyperlink to open the **Select a Person** dialog.
10. If required, select a **Budget code** for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

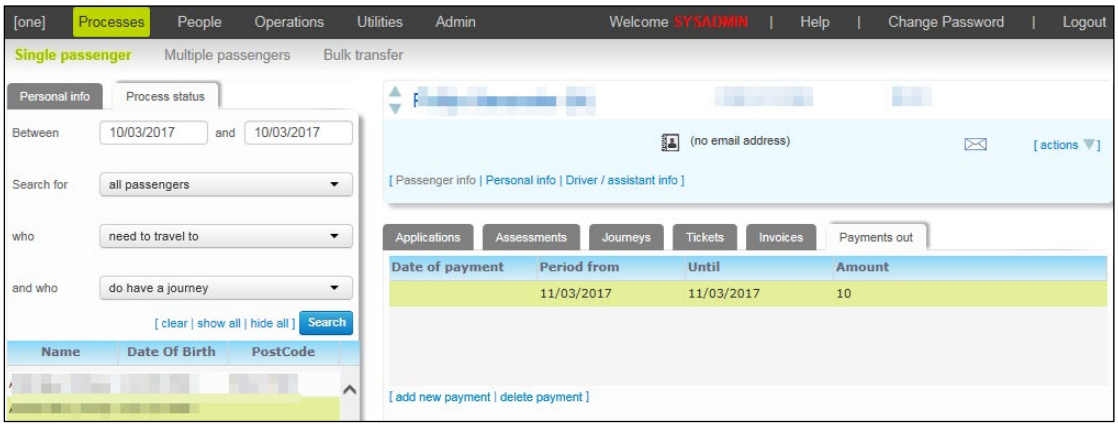


5. If required, add a cancellation date into the field next to the **Cancelled on** check box and select a cancellation reason from the **because** menu.
6. Click the **Save** button to cancel the payment.

> ***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 Selecting a Passenger 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 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 1st January and 31st 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:

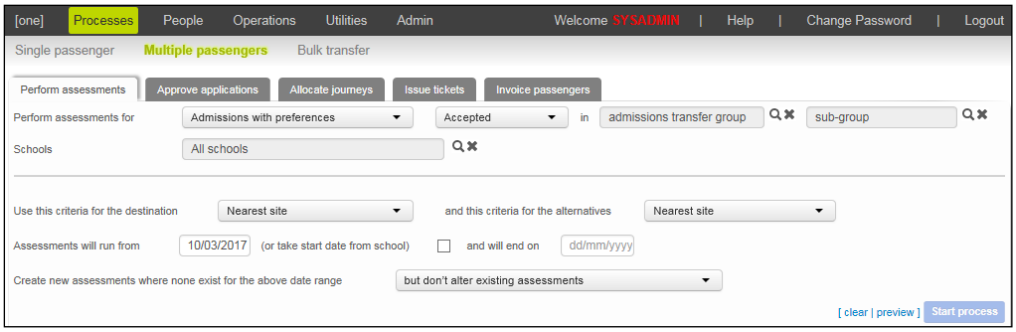
- By school.
- By application.
- By admissions transfer group.

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.

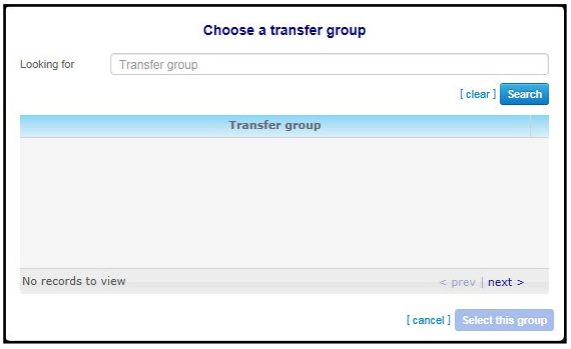
The bulk assessment process will only assess passengers for whom the correct home LA has been defined. For more information on defining a passenger's home LA, see Recording Status Details on page *60*.

Performing Bulk Assessments by Admissions Transfer Group

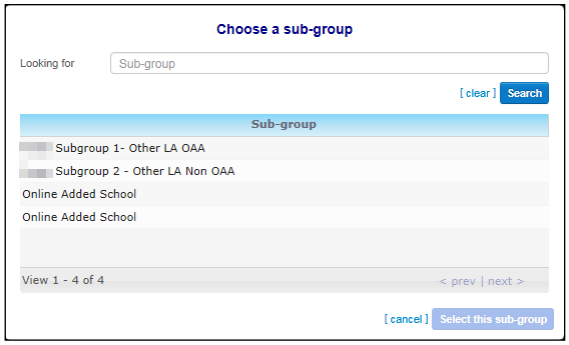
1. Select the **Processes** area and select the **Multiple passengers** page.
2. Ensure that the **Perform assessments** tab is selected.
3. Select **Admissions with preferences** from the **Perform assessments for** menu.



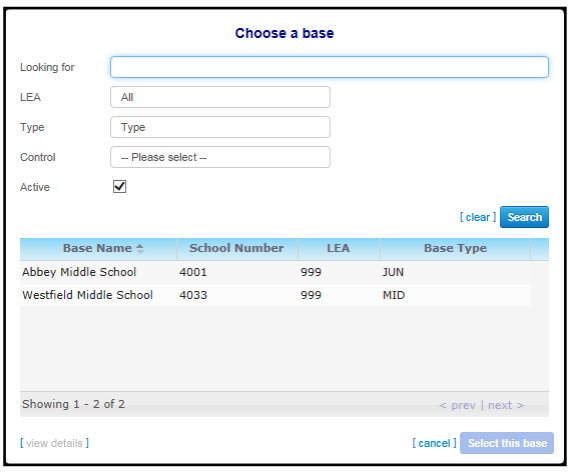
4. Select whether you want to assess by **Accepted**, **Allocated**, **Offered** or **Provisional** preferences from the drop-down menu. You can select multiple options simultaneously.
5. Select an admissions transfer group:
   a. Click the **admissions transfer group** browse to display the **Choose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



   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.



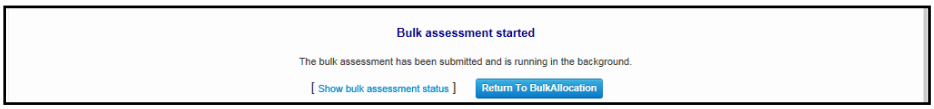
   b. Highlight a sub-group and click the **Select this sub-group** button to select the sub-group and close the dialog.
7. If required, select a school to perform assessments for:
   a. Click the **Schools** browse to display the **Choose a base** dialog.



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.

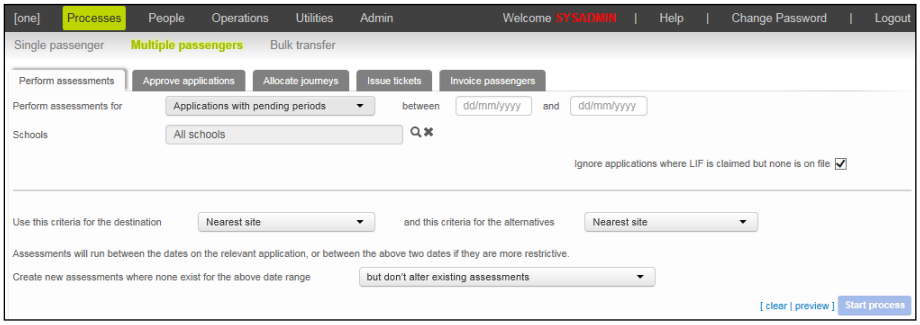
8. Select an option from the **Use this criteria for the destination** and **And this criteria for the alternatives** drop-down menus. These menus determine which of the selected base's gates or sites will be used when measuring distance in the assessment.
9. If required, enter start and end dates for 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.

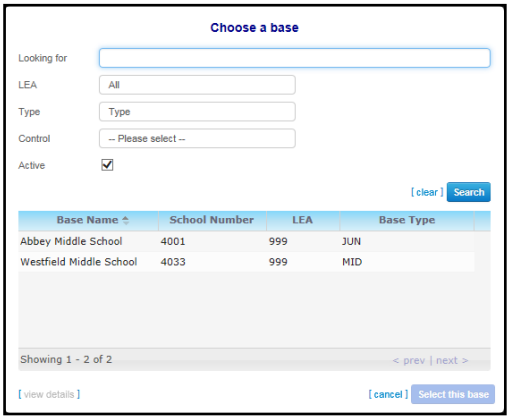
Performing Bulk Assessments by Application

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.



4. Enter valid dates into the **between** and **and** fields.
5. If required, select a school to perform assessments for:

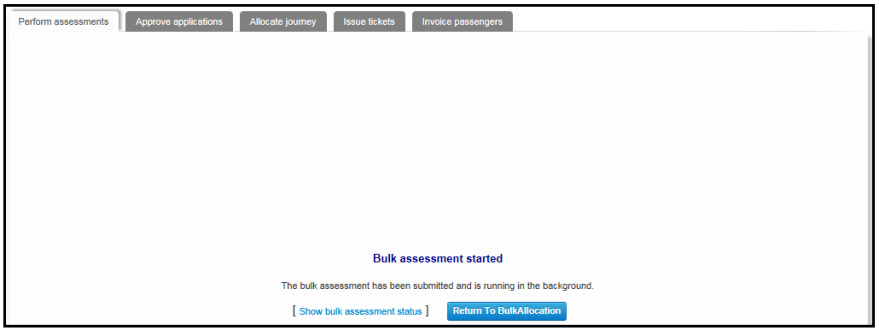
a. Click the **Schools** browse to display the **Choose a base** dialog.



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.

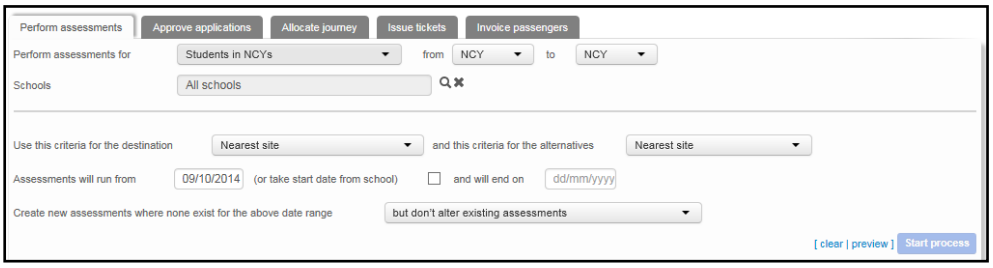
6. Select an option from the **Use this criteria for the destination** and **this criteria for the alternatives** drop-down menus. These menus determine which of the selected base's gates or sites will be used when measuring distance in the assessment.
7. Select the way that existing assessments should 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.



9. 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.

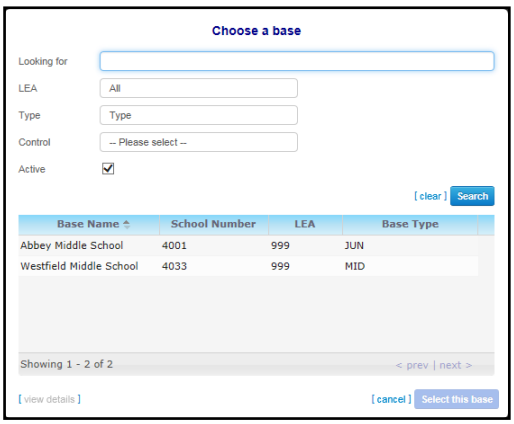
Performing Bulk Assessments by School

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.



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.



b. Enter search criteria and then click the **Search** button to view a list of matching bases.

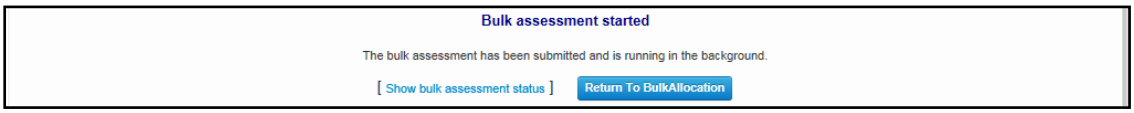
c. Highlight the desired base and then click the **Select this base** button to select the base and close the browse.

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.

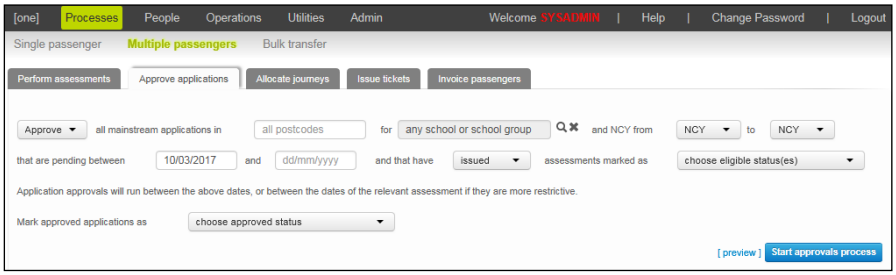


10. Click the **Return To BulkAllocation** button to return to the **Processes | Multiple passengers | Perform assessments** page. Alternatively, click the **Show bulk assessment status** hyperlink to view the assessment job in the Job Manager.

Approving or Rejecting Applications in Bulk

1. Select the **Processes** Area and select the **Multiple passengers** page.

2. Select the **Approve applications** tab.

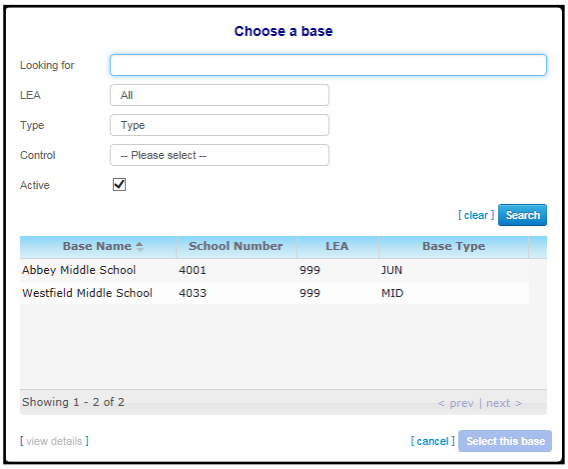


3. Choose whether you want to **Approve** or **Reject** applications by selecting the appropriate option from the drop-down menu.

4. Enter the **Postcode** you want to process applications for.

5. Select a school to process applications for:

a. Click the **any school or school group** browse to display the **Choose a base** dialog.



b. Enter search criteria and then click the **Search** button to view a list of matching bases.

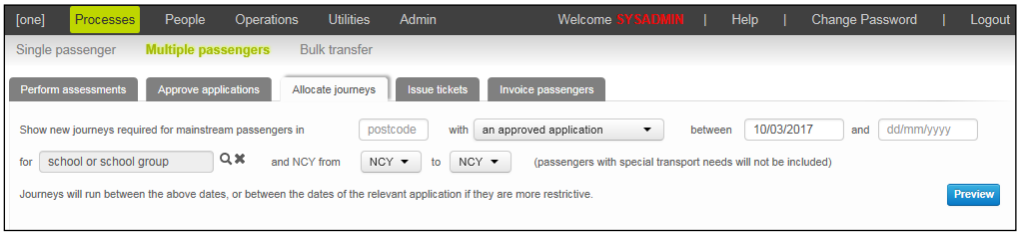
c. Highlight the desired base and then click the **Select this base** button to select the base and close the browse.

6. Select the range of **NCY**s you want to process applications for.
7. Enter valid dates into the **pending between** fields.
8. Select an assessment type from the **issued** menu.
9. Select an assessment status from the **choose eligible status(es)** menu.
10. Select a status for the applications from the **Mark approved applications as** drop-down menu. The selected applications will be marked with this status after the process is run.
11. Click the **Start approvals process** button to process the applications.

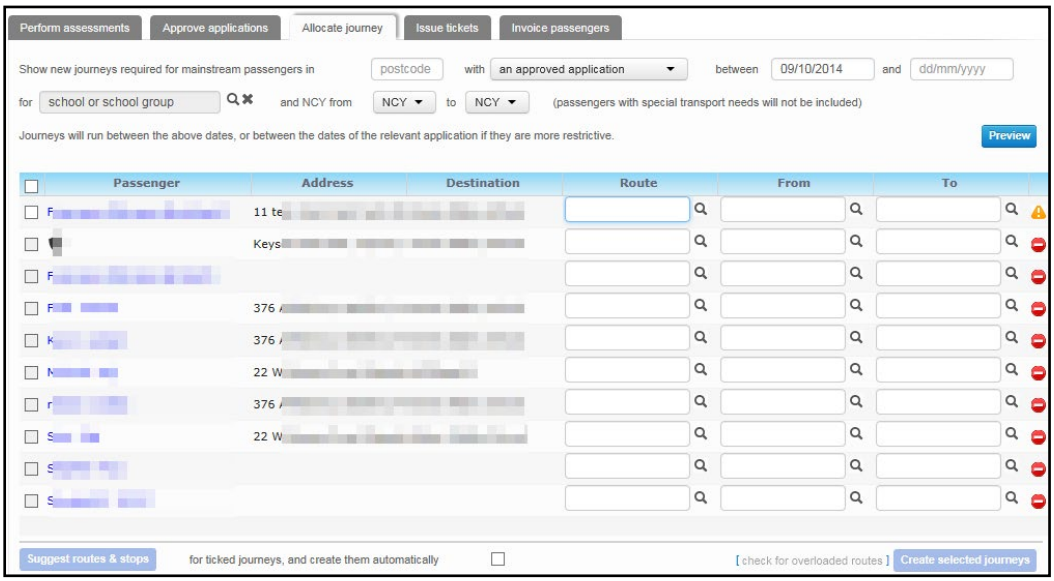
> ***NOTE:*** *All selection fields in the* ***Approve applications*** *menu are optional.*

Creating Journeys in Bulk

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



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



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 One Publications 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.*

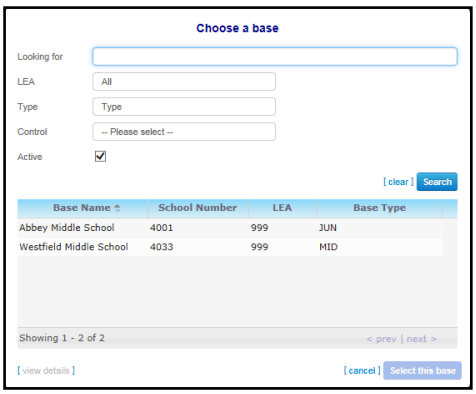
8. Click the **Create selected journeys** button to create the journeys.

Creating Tickets in Bulk

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

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.



b. Enter search criteria and then click the **Search** button to view a list of matching bases.

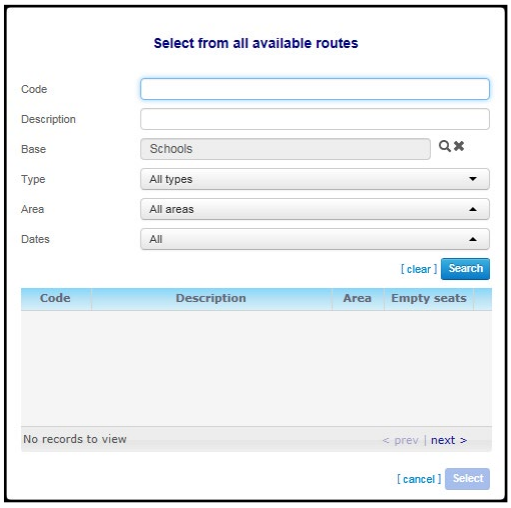
c. Highlight the desired base then click the **Select this base** button to select the base and close the dialog.

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.

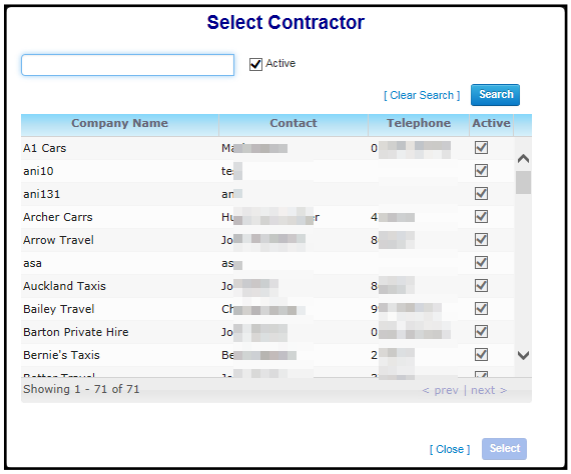


      ii. Enter search criteria and then click the **Search** button. A list of matching journeys is displayed.

      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.

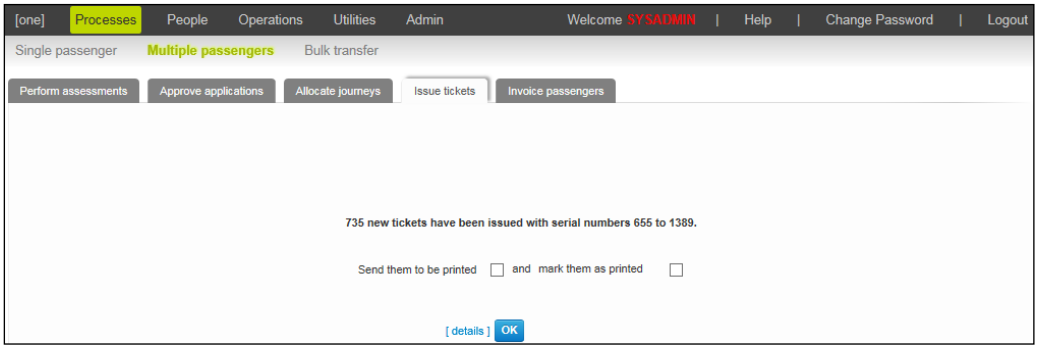


      ii. Highlight the contractor you want to issue tickets for and click the **Select** button to select the contractor and close the browse.

   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.

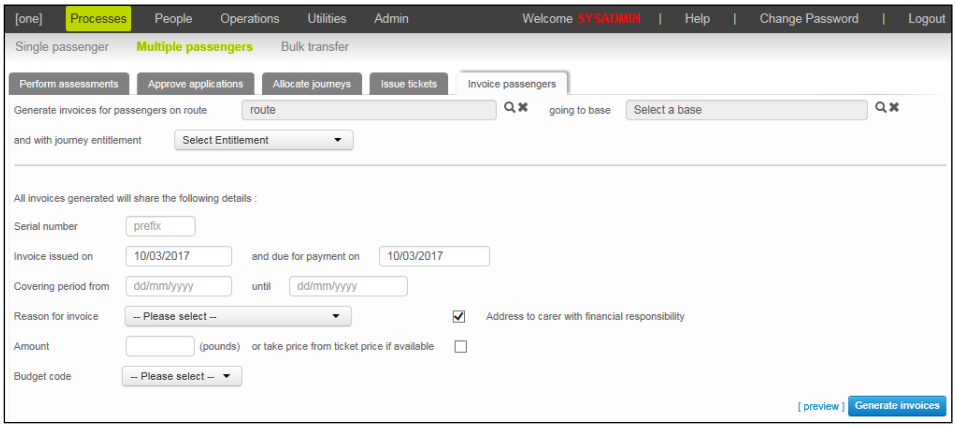


13. If required, select the **Send them to be printed** and **mark them as printed** check boxes and then click the **OK** button. The issued tickets are sent for printing.
14. If required, click the **details** hyperlink to view details of the issued tickets.

> ***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.



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**.

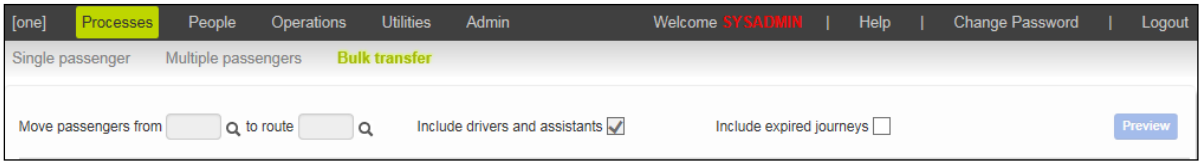
   You can only select reasons that have already been created in One. For more information on setting up invoice reasons, see Configuring Invoice Reasons *on page 151*.

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.

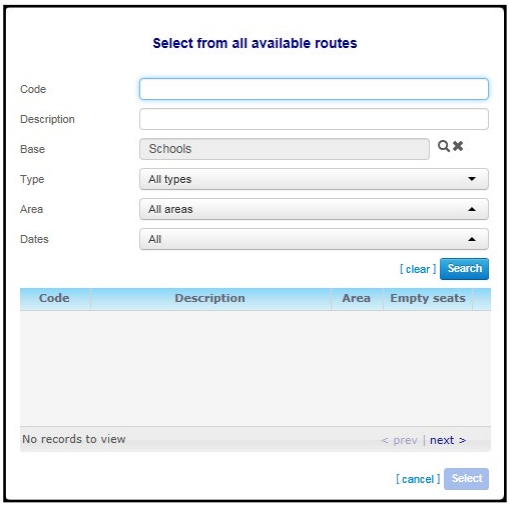
Bulk Transferring Journeys to a New Route

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

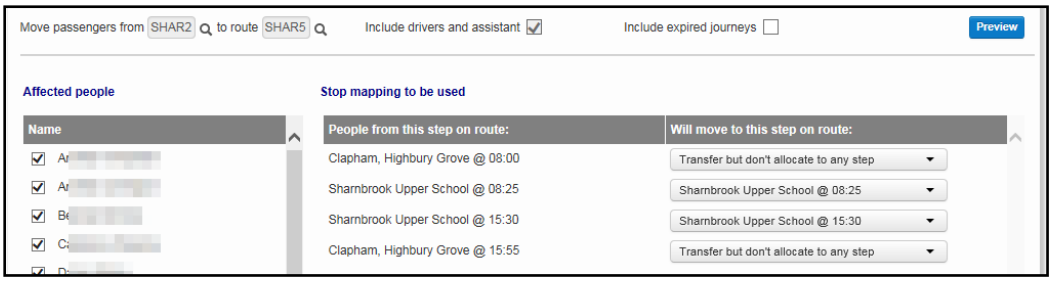
1. Select the **Processes** area and select the **Bulk transfer** page.



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.



   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.



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 Bulk Transferring Journeys to a New Route 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

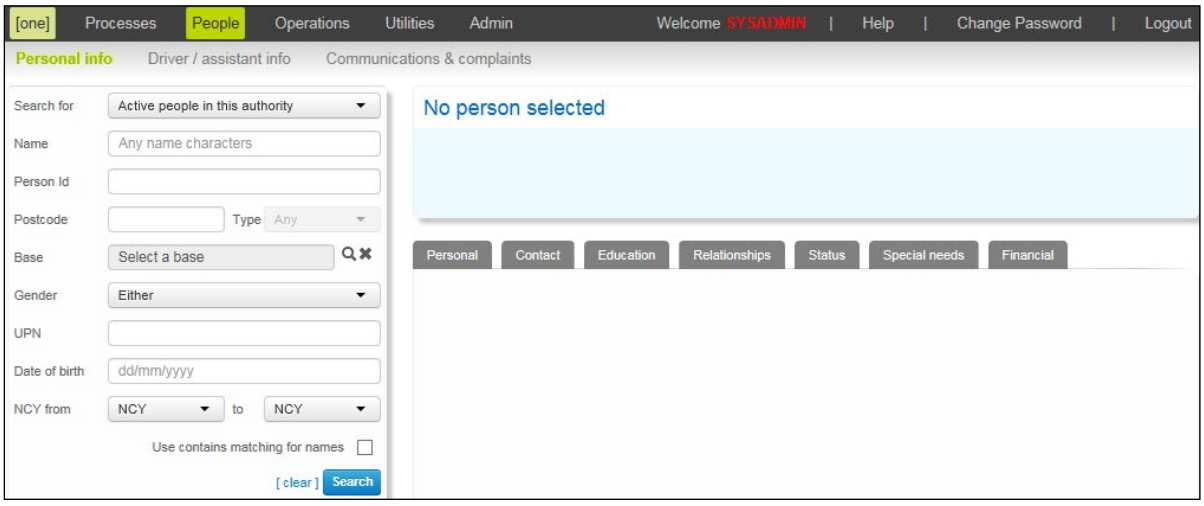
The **People** area enables you to view and manage person details within One Transport.

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.



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 Recording Status Details 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.

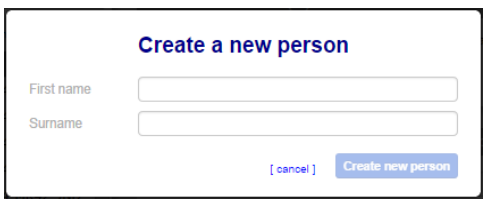
> ***NOTE:*** *Click the **export** hyperlink at the bottom of the list to export the returned search results into a spreadsheet file.*

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 One Publications website.*

Creating a Person

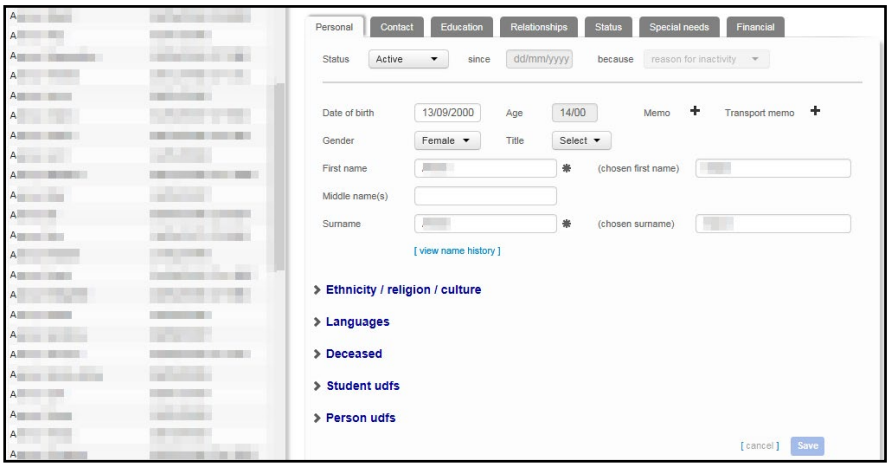
1. Select the **People** area.
2. Ensure that the **Personal info** page is selected.
3. Click the **Search** button to display a list of active people.
4. Click the **create a new person** hyperlink to display the **Create a new person** dialog.



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

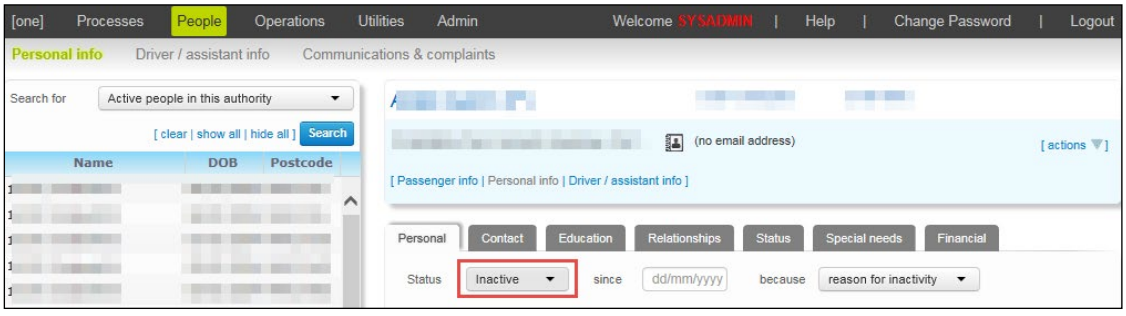
1. Select a person. For more information on selecting a person, see Selecting a Person on page *49*.
2. Ensure that the **Personal** tab is selected. Editable fields relating to the person's details are displayed.



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 Selecting a Person on page *49*.
2. Ensure that the **Personal** tab is selected.
3. Select **Inactive** from the **Status** menu.

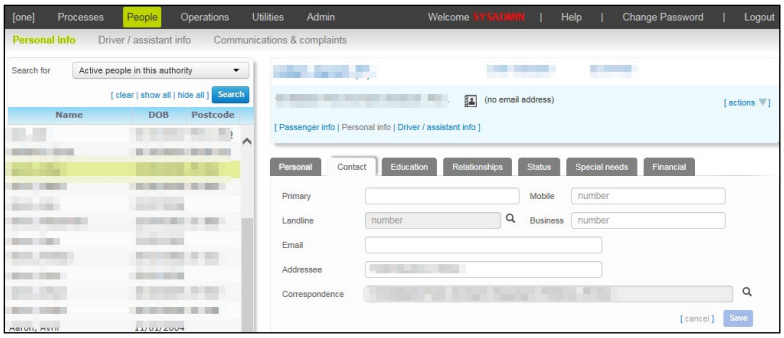


4. Click the **Save** button to confirm your changes.

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

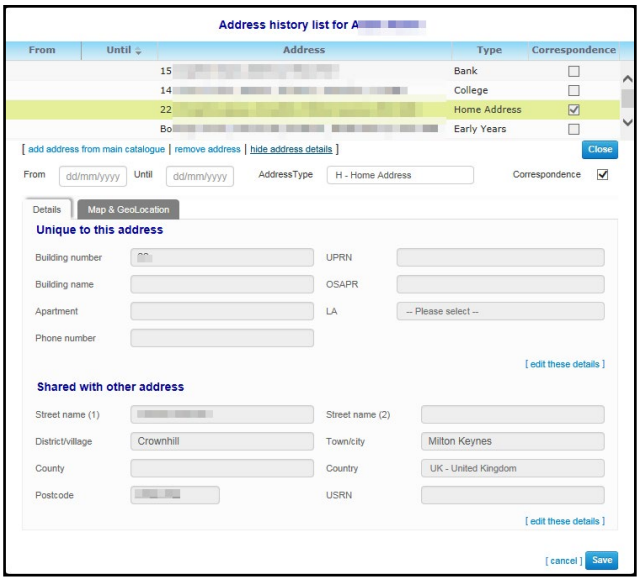
Recording a Person's Contact Details

1. Select a person. For more information on selecting a person, see Selecting a Person on page *49*.
2. Select the **Contact** tab. Editable fields relating to the person's contact details are displayed.



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.

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

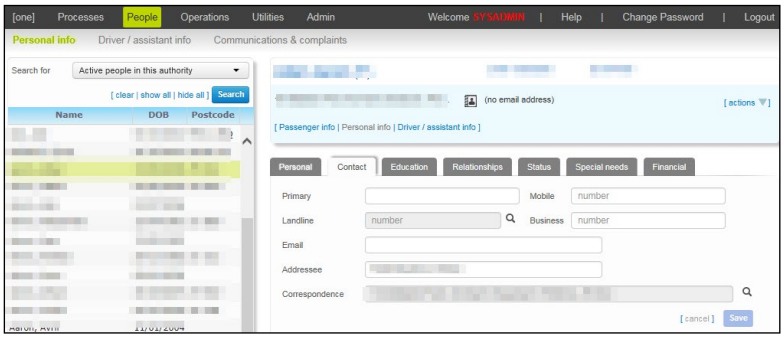


   c. Select the **Correspondence** check box. This box denotes which of the addresses in the passenger's address history is the current correspondence address. A passenger can only have one correspondence address at a time.
   d. Click the **Save** button and then click the **Close** button to close the 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

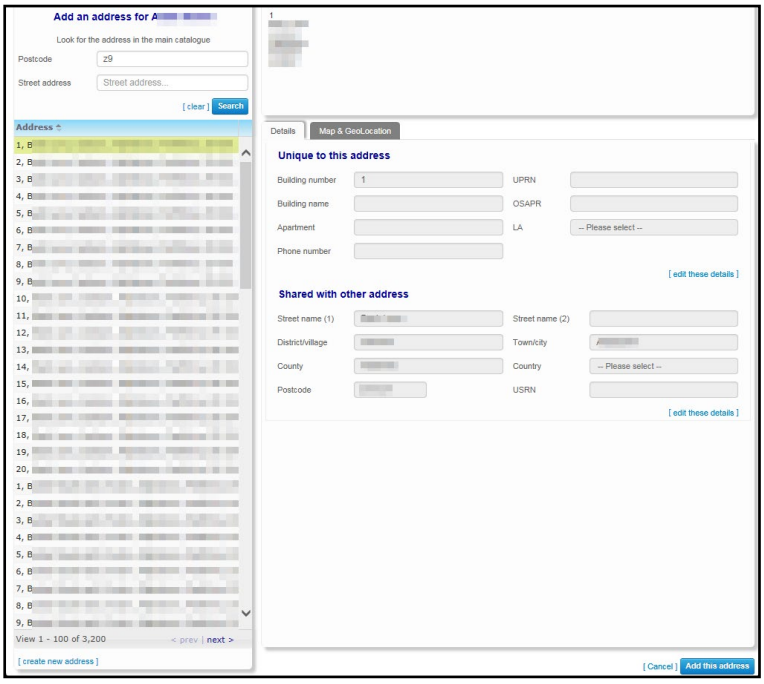
1. Select a person. For more information on selecting a person, see Selecting a Person on page *49*.
2. Select the **Contact** tab. Editable fields relating to the person's contact details are displayed.



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

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

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.



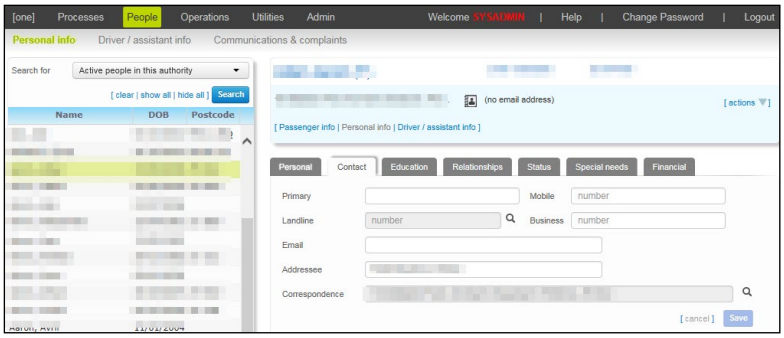
6. Highlight the address you want to add and then click the **Add this address** button to add the address and return to the **Address history list** dialog.

> ***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* *Adding an Address to the Address Catalogue on page 132.*

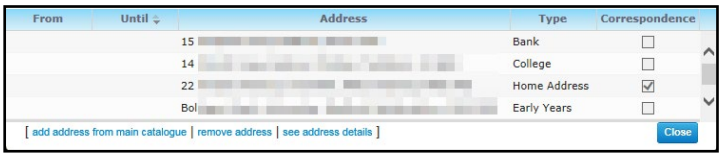
7. If required, enter valid dates into the **From** and **Until** fields.
8. If required, select the **Correspondence** check box to mark the new address as the person's correspondence address.
9. Select an **Address Type**.
10. Click the **Save** button to save the new address and close the dialog.

Editing the Addresses in a Person's Address History

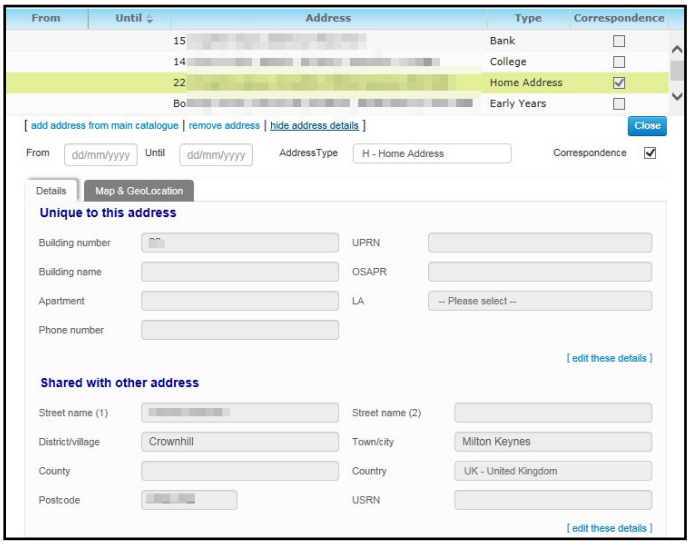
1. Select a person. For more information on selecting a person, see Selecting a Person on page 49.
2. Select the **Contact** tab. Editable fields relating to the person's contact details are displayed.



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



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

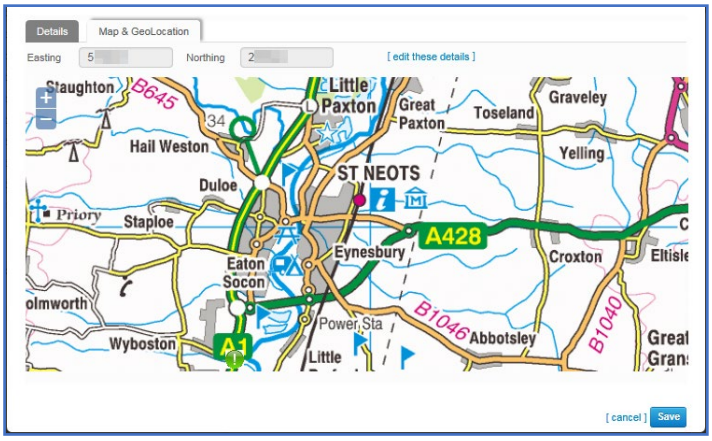


5. Make the desired changes. For more information on editing addresses, see Editing an Address on page *134*.

   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.*

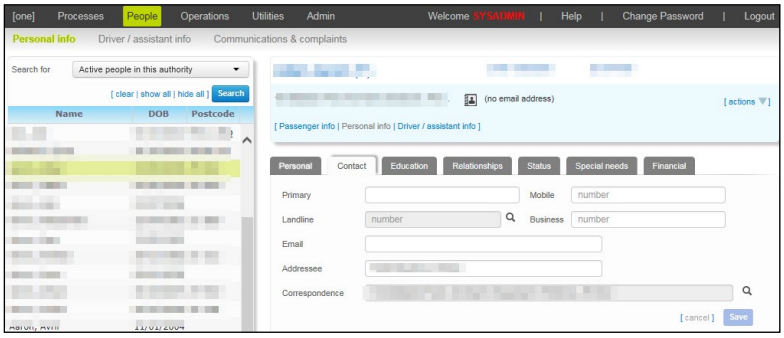
7. Click the **Close** button to close the **Address history list** dialog.

8. Click the **Save** button to save your changes.

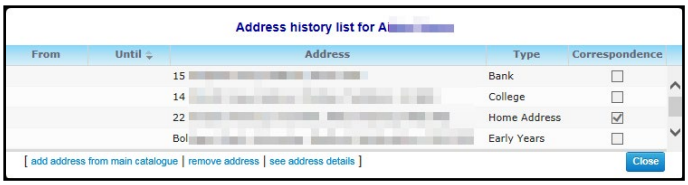
Deleting an Address from a Person's History

1. Select a person. For more information on selecting a person, see Selecting a Person 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.



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.*

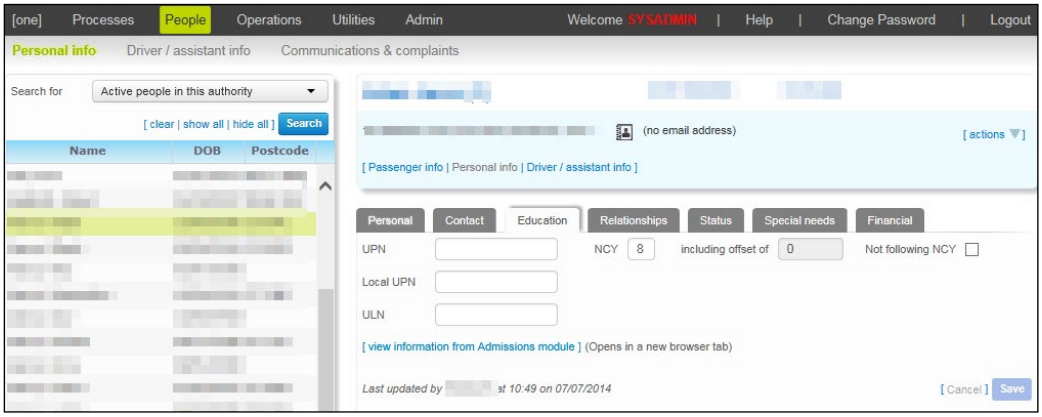
Recording a Person's Education Details

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

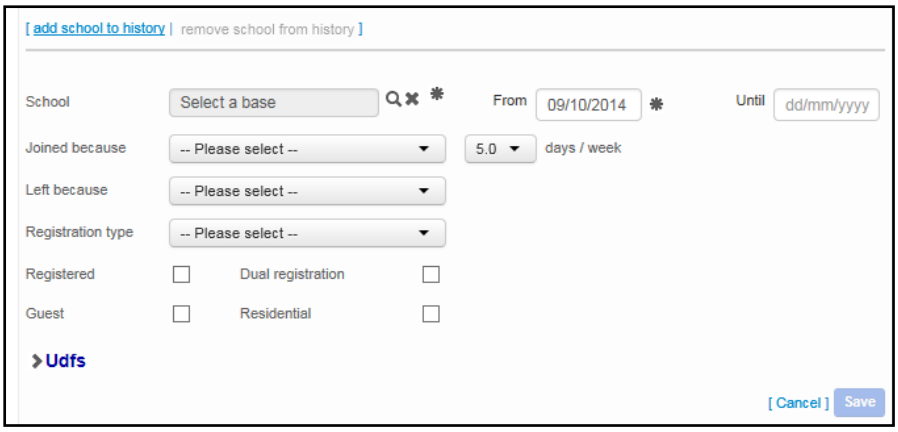
1. Select a person. For more information on selecting a person, see Selecting a Person on page *49*.
2. Select the **Education** tab to view the person's **UPN**, **Local UPN**, **ULN** and **NCY** numbers as editable fields.



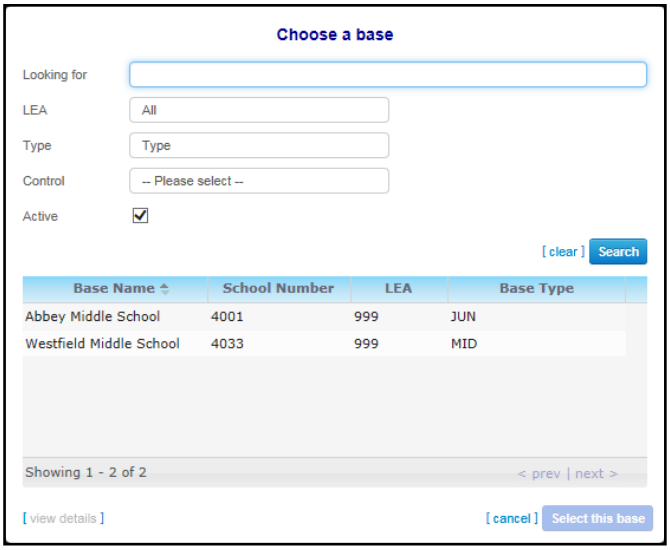
3. Make the required edits.
4. Click the **Save** button to save your changes.

Adding a School to a Person's School History

1. Select a person. For more information on selecting a person, see Selecting a Person on page *49*
2. Select the **Education** tab.
3. Open the **School History** section. A list showing the schools that the person attends and has previously attended is displayed.
4. Click the **add school to history** hyperlink to display editable fields related to school details.



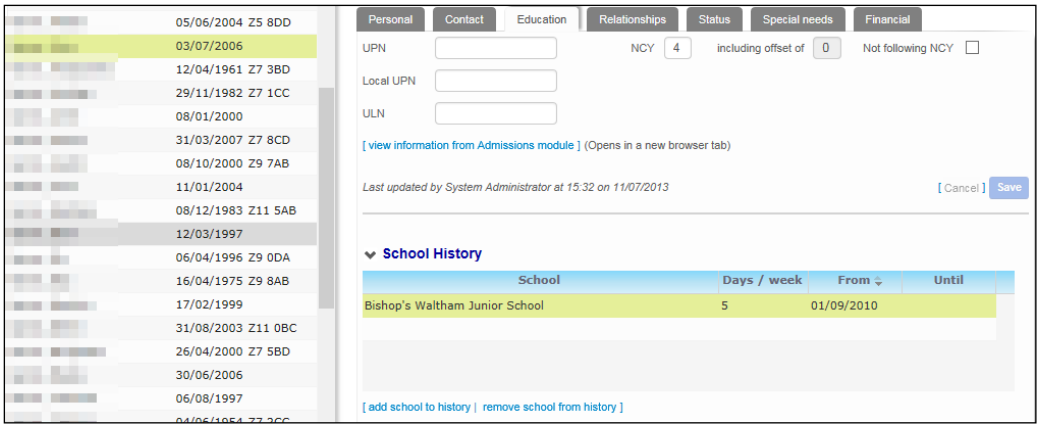
5. Select the school that you want to add:
   a. Select the **School** browse to display the **Choose a base** dialog.



   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 Selecting a Person 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.



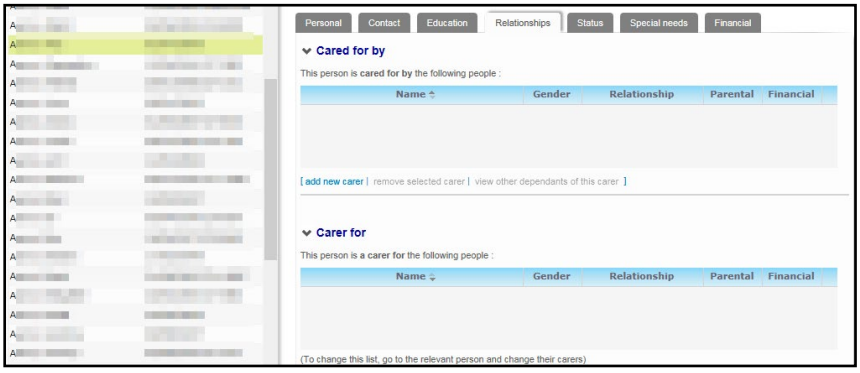
5. Click the **remove school from history** hyperlink. A confirmation dialog is displayed.
6. Click the **Delete** button to remove the school from the person's history.

Editing a Person's Carers

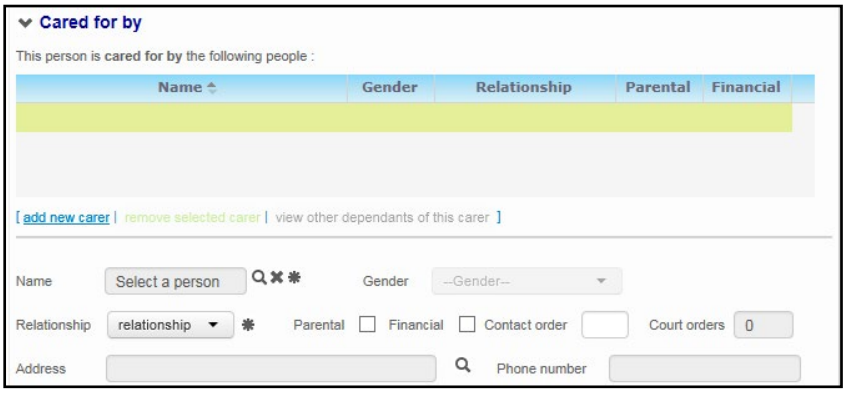
A person's carers are managed through the **People | Personal info | Relationships** tab. You can nominate any person in the One Transport database as a carer for another. A list of the people that a given person is a carer for is displayed in the **Carer For** section of the **Relationships** tab.

Adding a Person's Carer

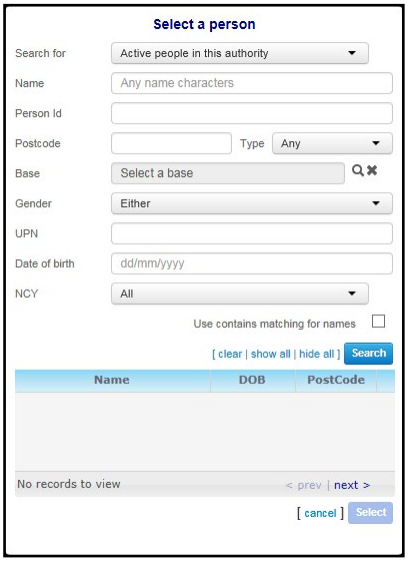
1. Select a person. For more information on selecting a person, see Selecting a Person on page *49*.
2. Click the **Relationships** tab. A list of the person's carers and the people that person is a carer for is displayed.



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



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

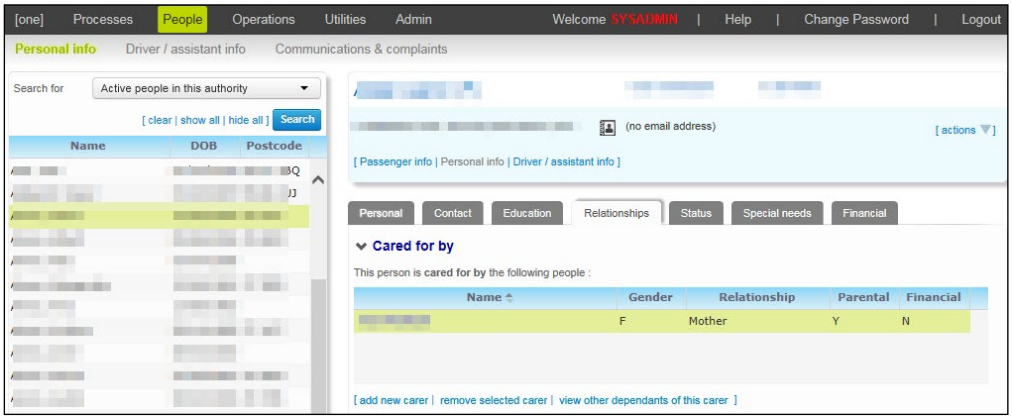


   b. Enter search criteria and then click the **Search** button to bring up a list of people who match those criteria.
   c. Highlight the carer you want to use and then click the **Select** button to select the carer and close the dialog.
5. Select the person's **Relationship** to the carer.
6. Enter **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 Creating a Person *on page 50*.

Removing a Person's Carer

1. Select a person. For more information on selecting a person, see Selecting a Person 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.

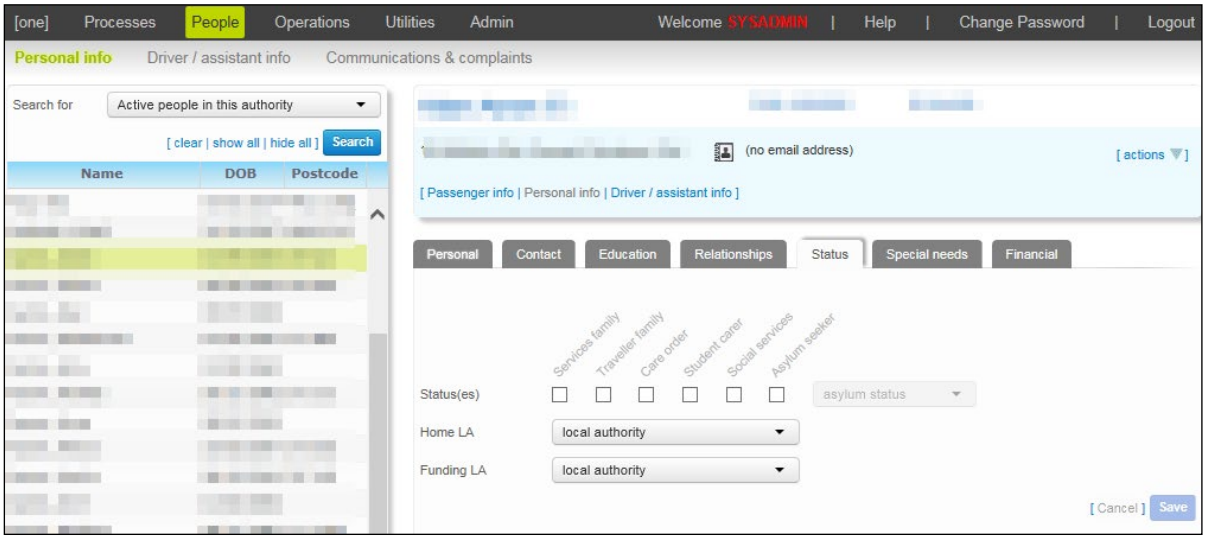


4. Click the **remove selected carer** hyperlink. A warning dialog is displayed.
5. Click the **Yes** button to remove the carer.

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 Selecting a Person on page *49*
2. Select the **Status** tab.



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** drop-down 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 Selecting a Person 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.

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 Selecting a Person on page *49*.
2. Select the **Status** tab.
3. Open the **Public care** section and highlight the care order you want to delete.

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.

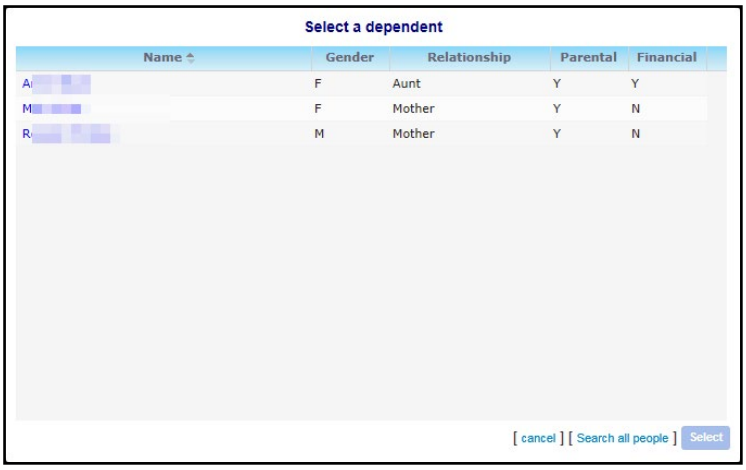
Managing Court Orders

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

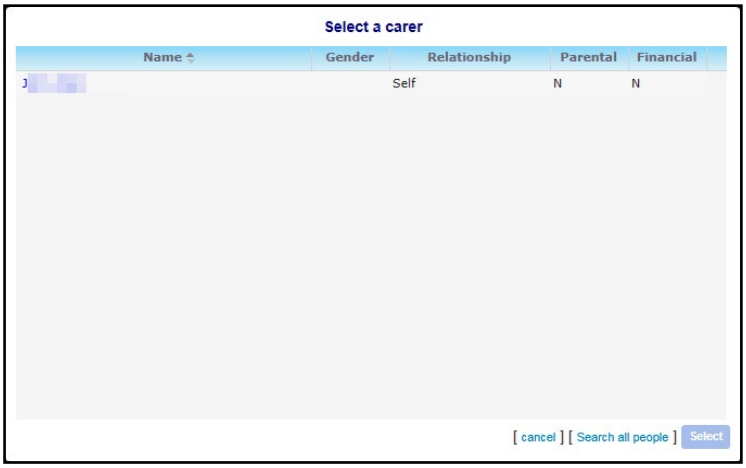
Recording a Court Order

1. Select a person. For more information on selecting a person, see Selecting a Person 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.

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.



   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.



   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 Selecting a Person on page *49*.
2. Select the **Status** tab.
3. Open the **Court orders** section and highlight the court order you want to delete.

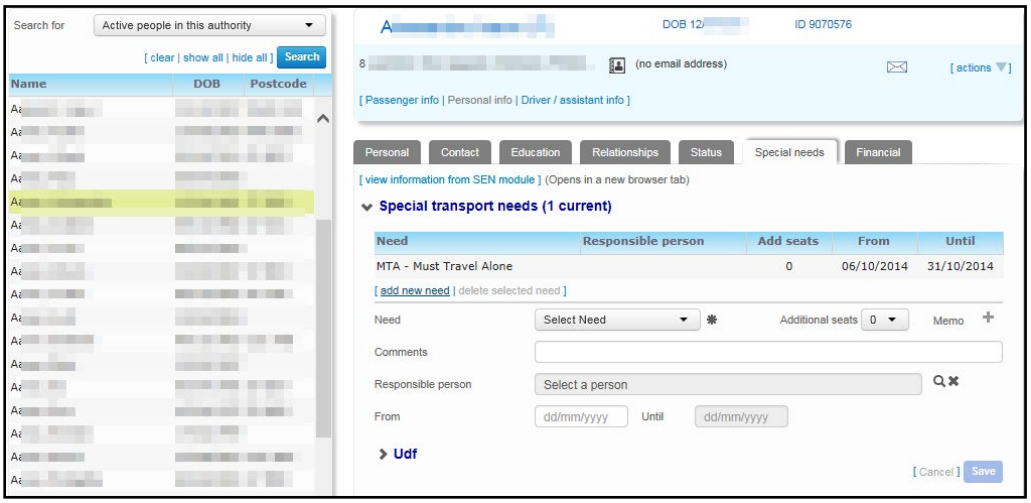
4. Click the **remove selected court order** hyperlink. A confirmation dialog is displayed.
5. Click the **Yes** button to delete the court order and close the dialog.

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 Selecting a Person 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.



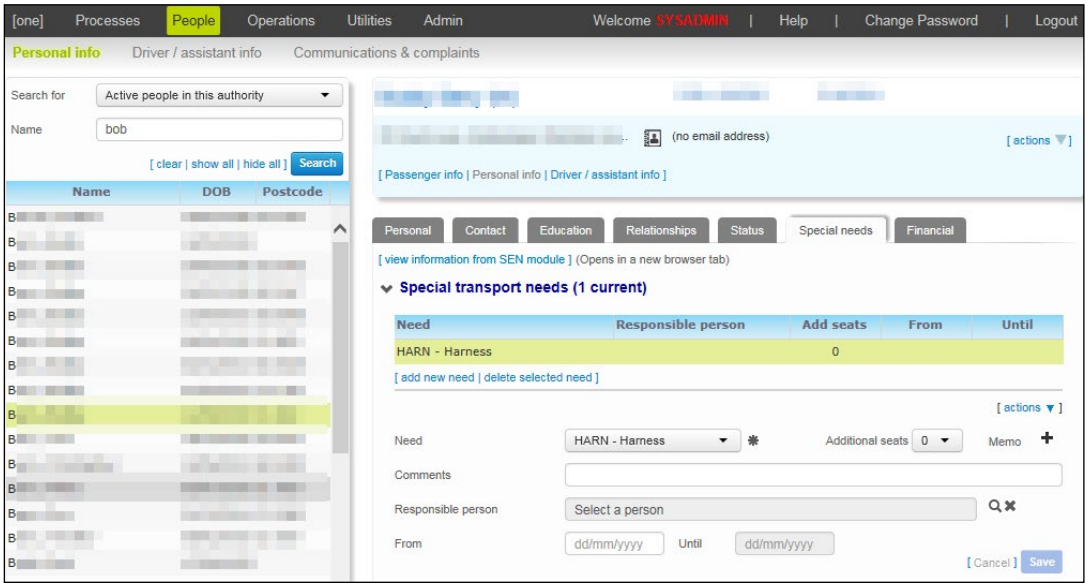
4. Select a **Need** type.

   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 Configuring Special Need Types 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

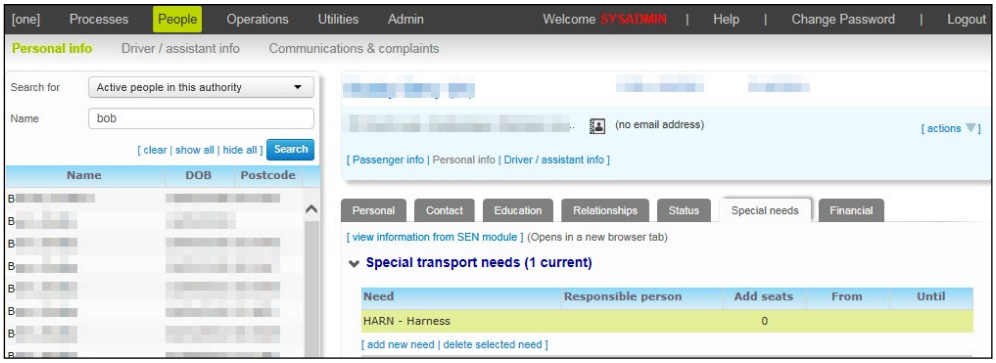
1. Select a person. For more information on selecting a person, see Selecting a Person on page *49*.
2. Select the **Special Needs** tab and open the **Special transport needs** section to view a list of the person's current transport needs.
3. Highlight the need you want to edit. Editable fields relating to that need appear.



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

Removing a Special Need

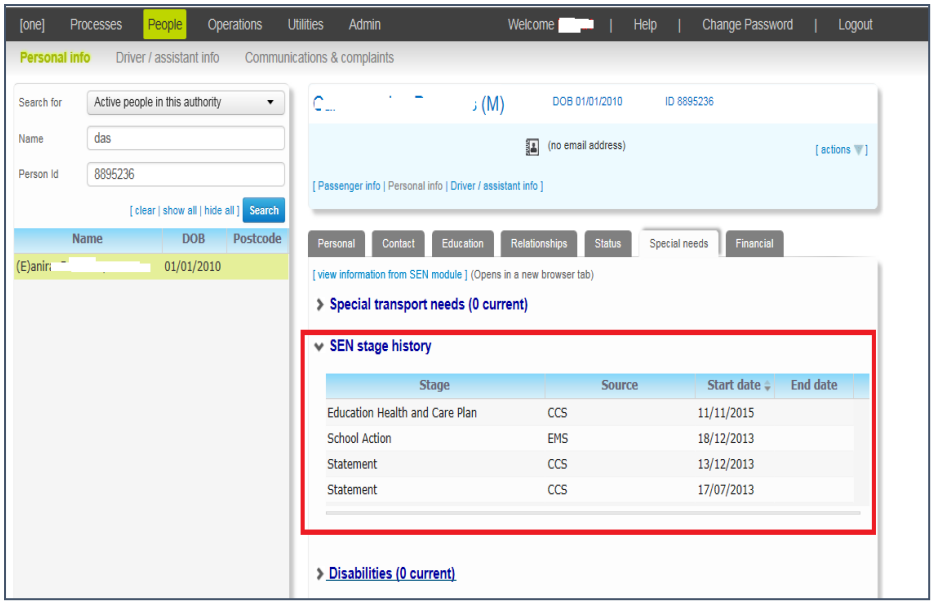
1. Select a person. For more information on selecting a person, see Selecting a Person on page *49*.
2. Select the **Special Needs** tab and open the **Special transport needs** section to view a list of the person's current transport needs.
3. Highlight the need that you want to delete.



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.



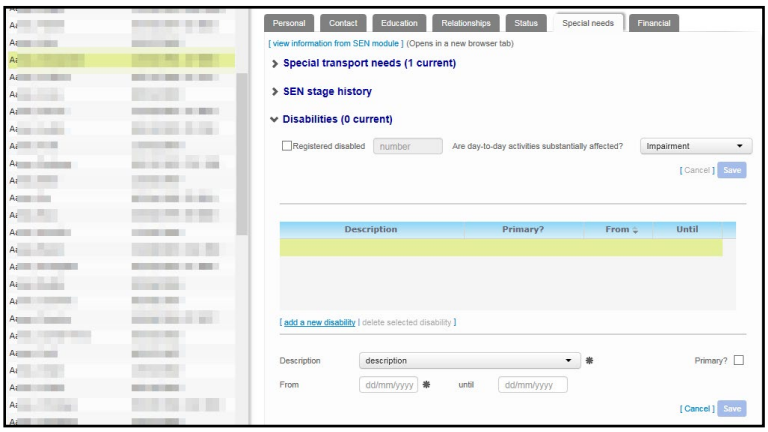
If a person has a SEN status of S (Statement) or E (EHCP), then the corresponding status letter is displayed before their name in person search results throughout One Transport. This enables you to see which people have SEN statements or EHCP plans in place without having to select them.

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 Selecting a Person 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.

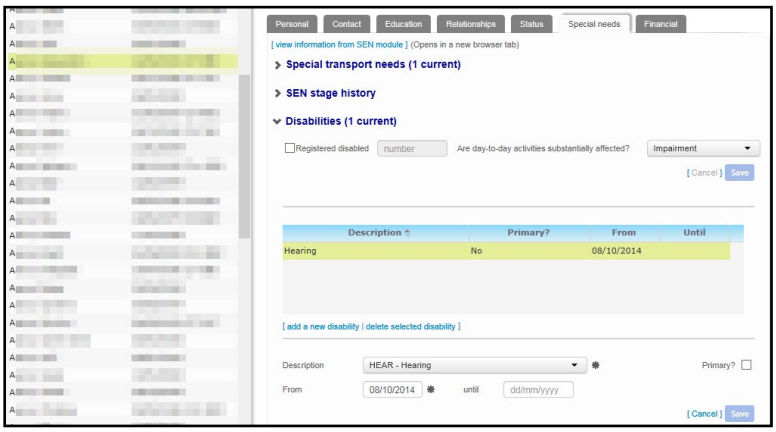


4. Select a disability type from the **Description** field.

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

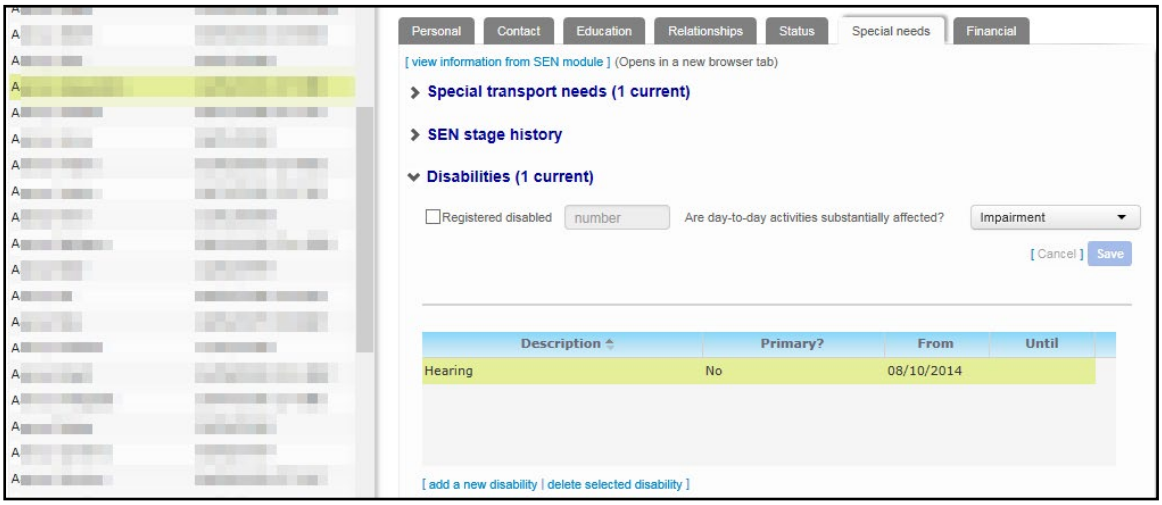
1. Select a person. For more information on selecting a person, see Selecting a Person on page *49*.
2. Select the **Special Needs** tab and open the **Disabilities** section. A list of the person's currently recorded disabilities is displayed.
3. Highlight the disability you want to edit. Editable fields related to that disability are displayed.



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

Deleting a Disability

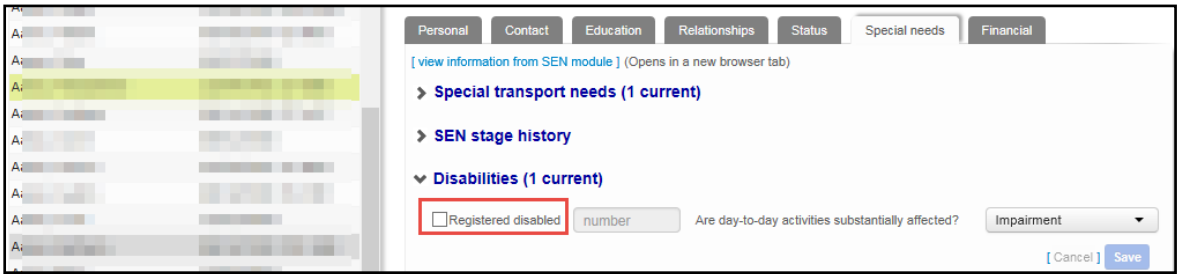
1. Select a person. For more information on selecting a person, see Selecting a Person on page *49*.
2. Select the **Special needs** tab and open the **Disabilities** section. A list of the person's disabilities is displayed.



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 Selecting a Person 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.



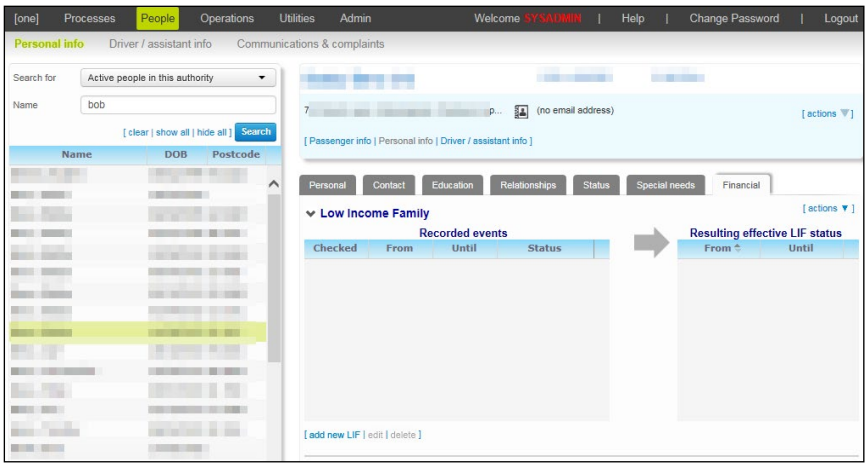
4. If known, enter the person's disability registration **number**.
5. Select an impairment status from the **Impairment** menu. The available options are:
   - **Impairment**
   - **Declined to Specify**
   - **Disabled**
   - **Not Disabled**
   - **Not Known**
6. Click the **Save** button to save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

Managing a Person's LIF Status

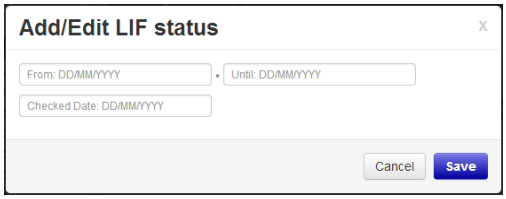
You can record and edit a person's Low Income Family (LIF) details through the **Low Income Family** section of the **People | Personal info | Financial** tab. This information is used when assessing transport eligibility.

Recording a LIF Event

1. Select a person. For more information on selecting a person, see Selecting a Person on page *49*.
2. Select the **Financial** tab.



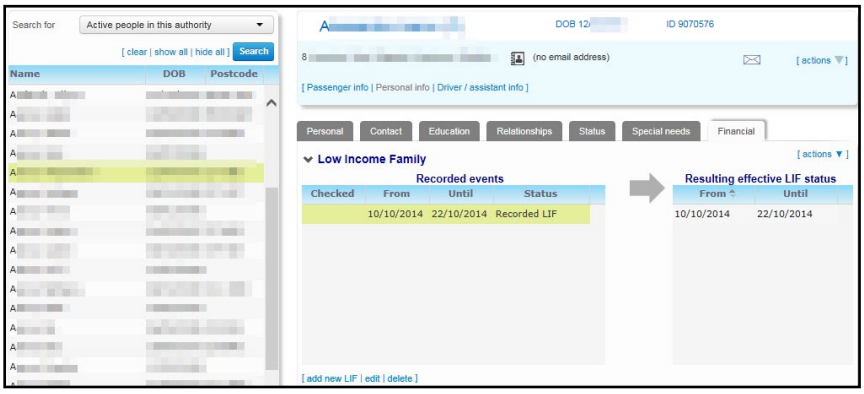
3. Open the **Low Income Family** section and click the **add new LIF** button to display the **Add/ Edit LIF status** dialog.



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 Selecting a Person 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.



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

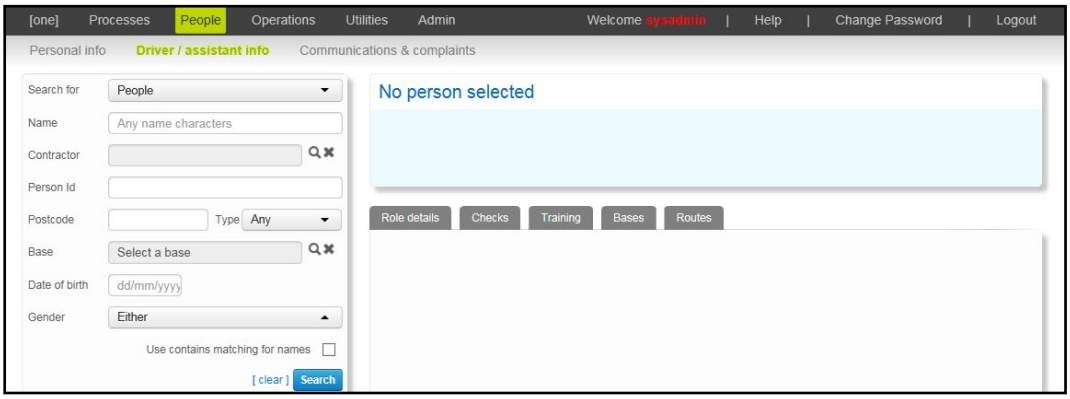
The **People | Driver/assistant info** page enables you to view and manage driver and passenger assistant details within Transport.

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

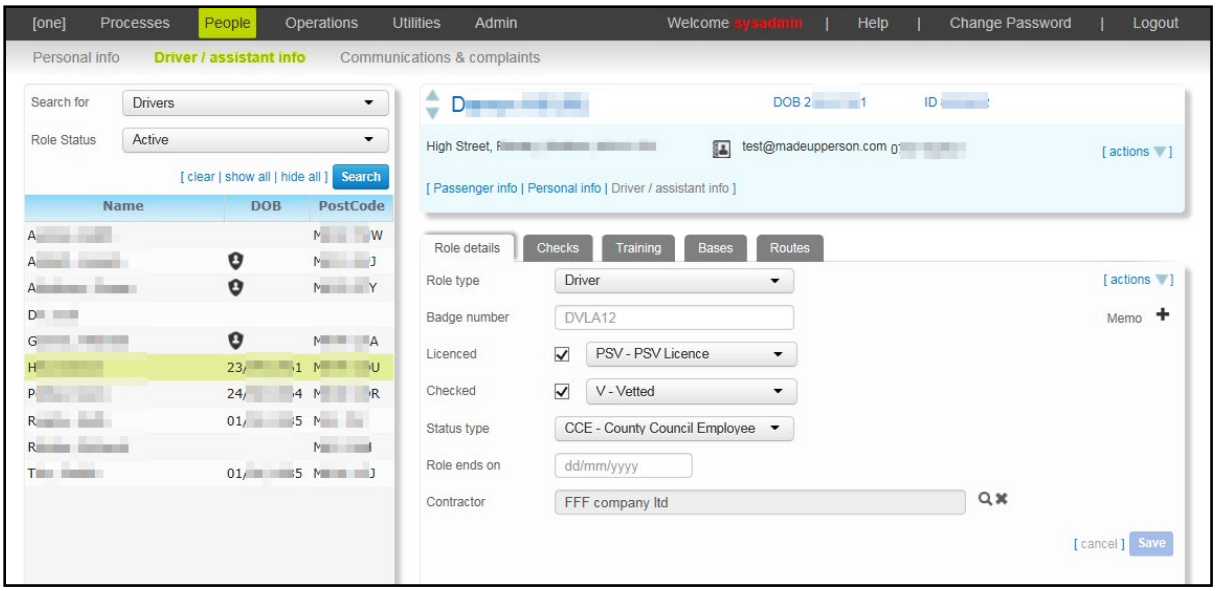
1. Select the **People** area and select the **Driver/assistant info** page.



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.

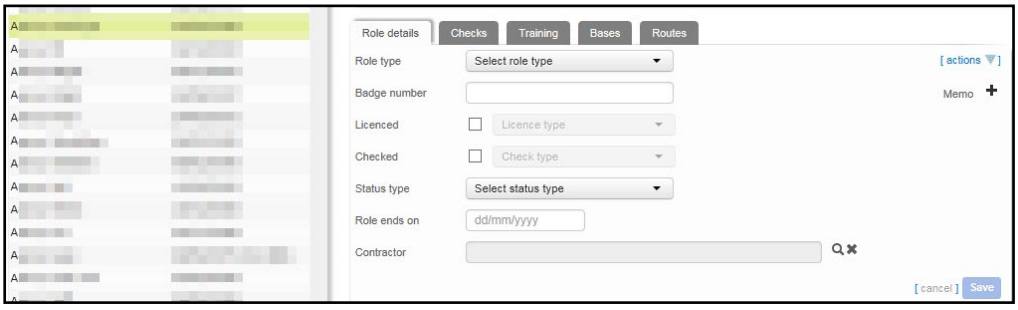


NOTES: *You can also select driver/passenger assistant details via the* ***People | Personal info*** *page. Select drivers/assistants with the* ***Driver/Assistant Info*** *page when you want to view or edit details specifically relating to that person's role (such as contract details or training completed)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

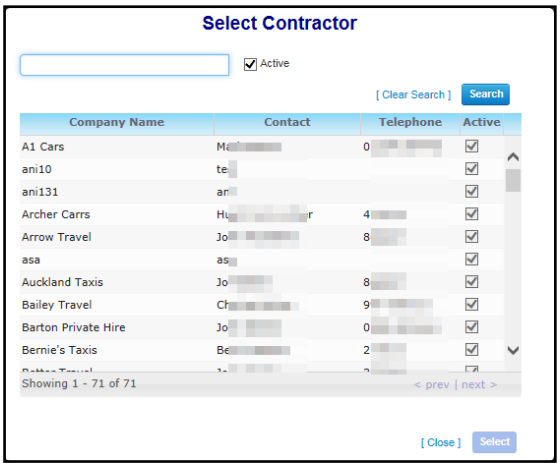
One Transport displays the number of results matching the entered search criteria at the bottom of the search panel. However, Access Control List (ACL) restrictions are applied in between the search being completed and the results being displayed. Therefore, the number of results visible on screen may 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 One Publications website.

Creating a Driver/Passenger Assistant

1. Create a person record for the driver/passenger assistant. For more information on creating people records, see Creating a Person on page *50*.
2. Select the person record that you just created. For more information on selecting drivers/assistants, see Selecting a Driver/Passenger Assistant on page *69*.
3. Ensure that the **Role details** tab is selected. Editable fields related to the driver/assistant's role are displayed.



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.



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 Selecting a Driver/Passenger Assistant 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.

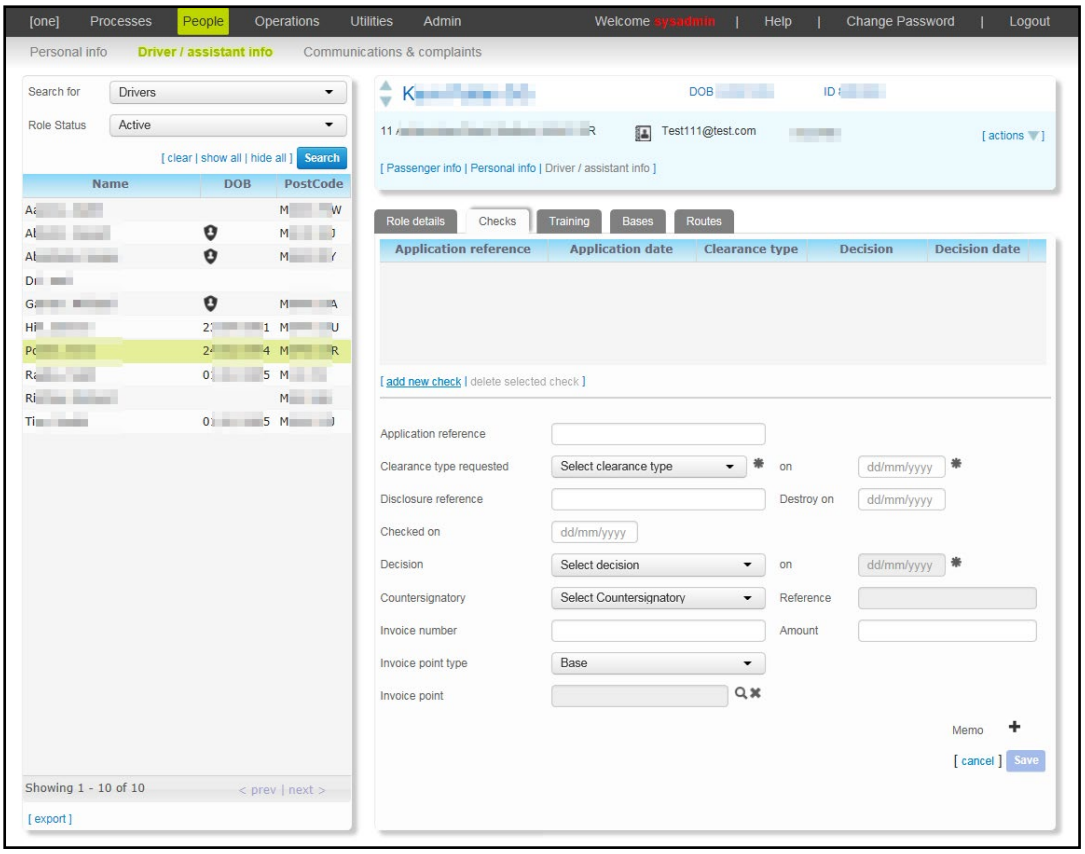
> ***NOTE:*** *The **People** | **Driver/Assistant Info** | **Role Details** tab only enables you to edit a driver/assistant's role details, such as their **Badge Number** or **Role Type**. To edit a driver/assistant's personal details, use the **People** | **Personal info** | **Personal** tab. For more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

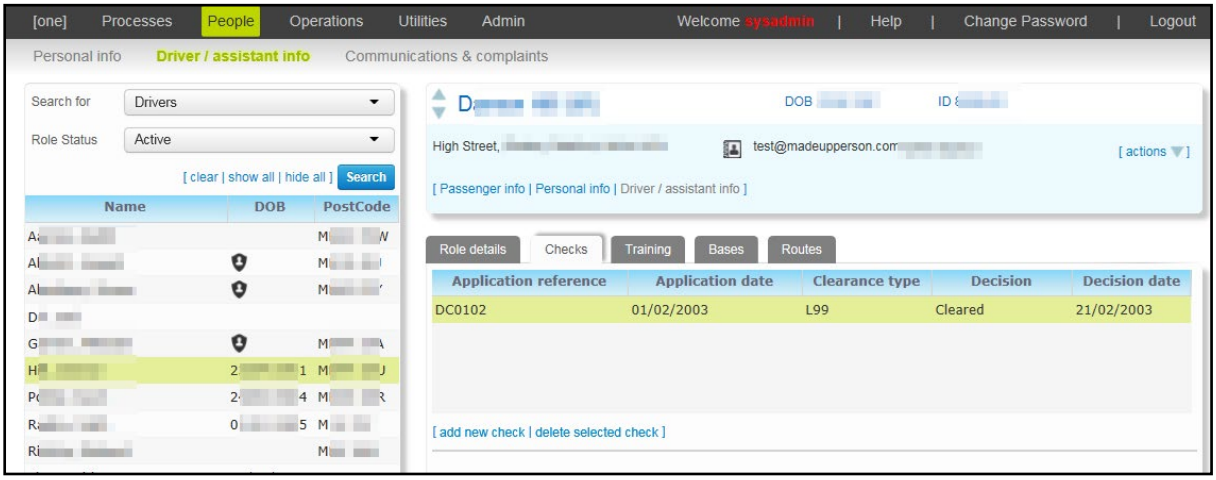
1. Select a driver/passenger assistant. For more information on selecting drivers/assistants, see Selecting a Driver/Passenger Assistant on page *69*.
2. Select the **Checks** tab.
3. Click the **add new check** hyperlink. Editable fields relating to check details are displayed.



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 Selecting a Driver/Passenger Assistant on page *69*.
2. Select the **Checks** tab.
3. Highlight the check you want to delete.



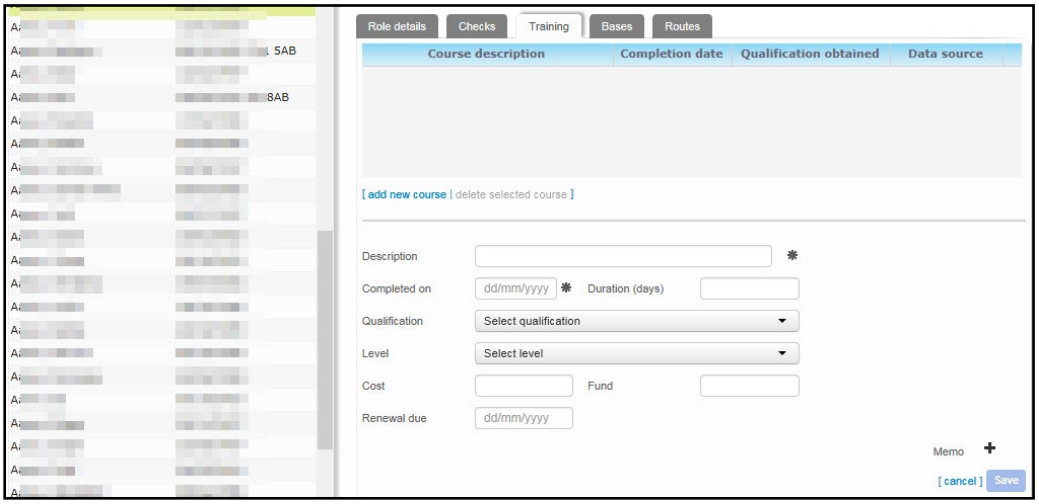
4. Click the **delete selected check** button. A warning dialog is displayed.
5. Click the **Yes** button to delete the check.

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 Selecting a Driver/Passenger Assistant on page *69*.
2. Select the **Training** tab.
3. Click the **add new course** hyperlink. Editable fields related to course details are displayed.

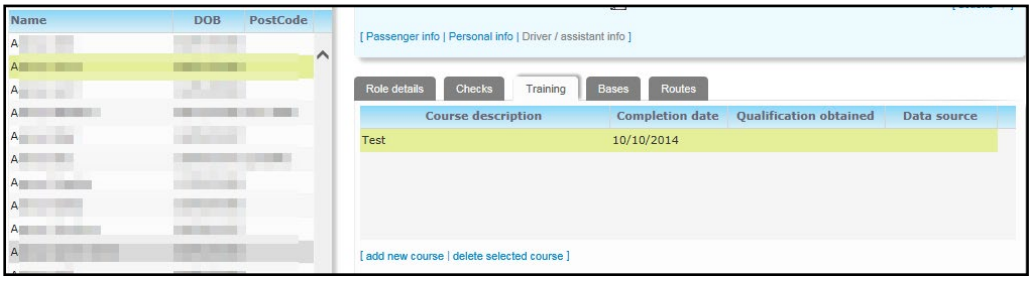


4. Add a **Description** of the course.
5. Enter a valid **Completed on** date.
6. Enter **Duration(days)**, **Qualification**, **Level, Cost, Fund** and **Renewal due** details as required.

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 Selecting a Driver/Passenger Assistant 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.



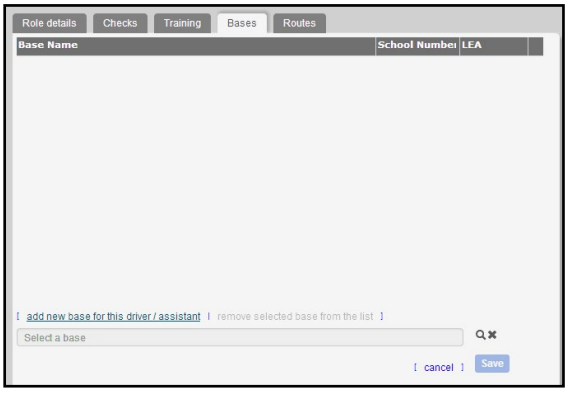
4. Click the **delete selected course** hyperlink. A warning dialog is displayed.
5. Click the **Delete** button to delete the course.

Editing Driver/Assistant Bases

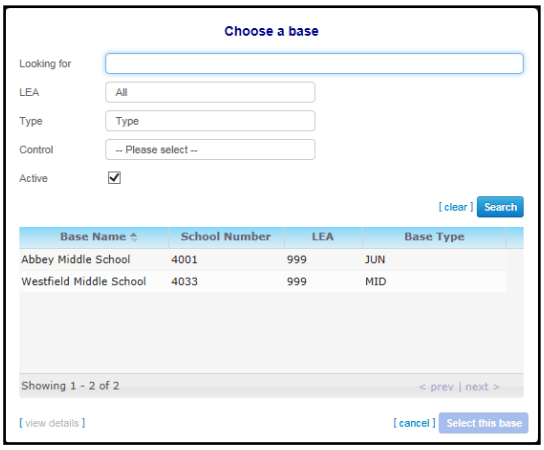
The **People | Driver/Assistant Info | Bases** tab shows an editable list of the bases that a given driver/assistant can operate from.

Adding a Base to a Driver/Assistant

1. Select a driver/passenger assistant. For more information on selecting drivers/assistants, see Selecting a Driver/Passenger Assistant 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.



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.

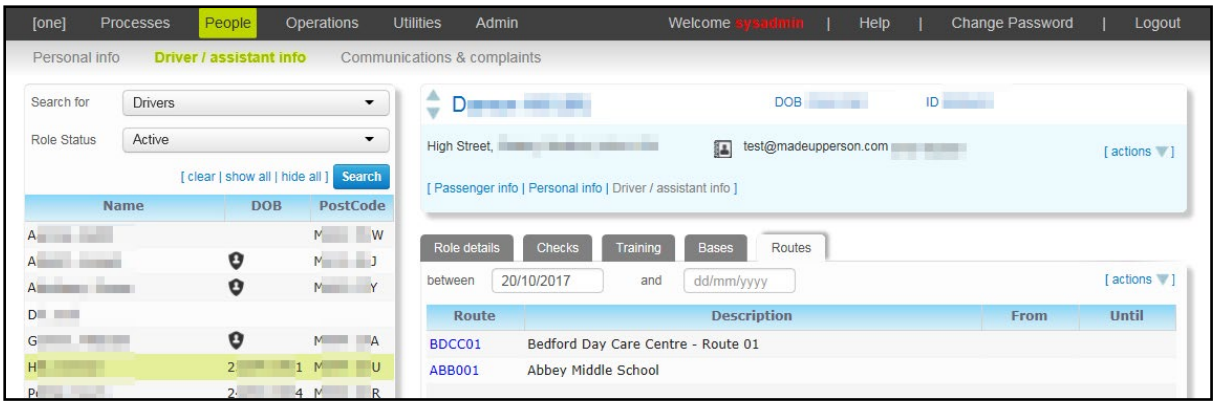
Deleting a Base from a Driver/Assistant Record

1. Select a driver/passenger assistant. For more information on selecting drivers/assistants, see Selecting a Driver/Passenger Assistant on page *69*.
2. Select the **Bases** tab.

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 Selecting a Driver/Passenger Assistant on page *69*.
2. Select the **Routes** tab. A list of all the routes that the selected driver/assistant works is displayed.



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

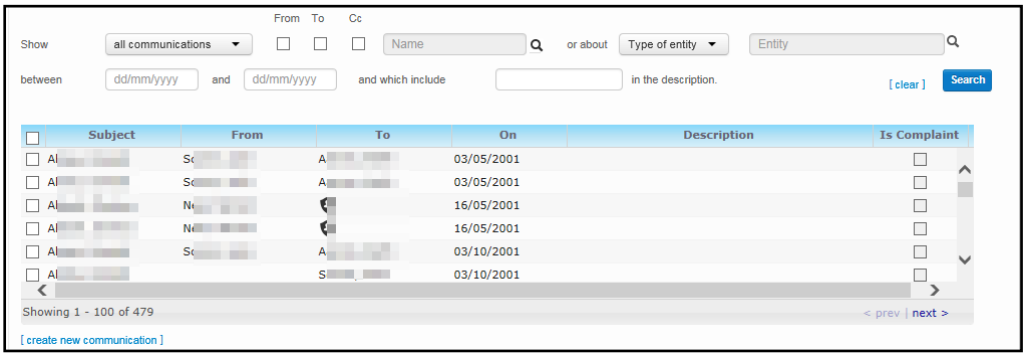
1. Select the **People** area and select the **Communications & complaints** page. Editable fields relating to communication details are displayed.

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.*



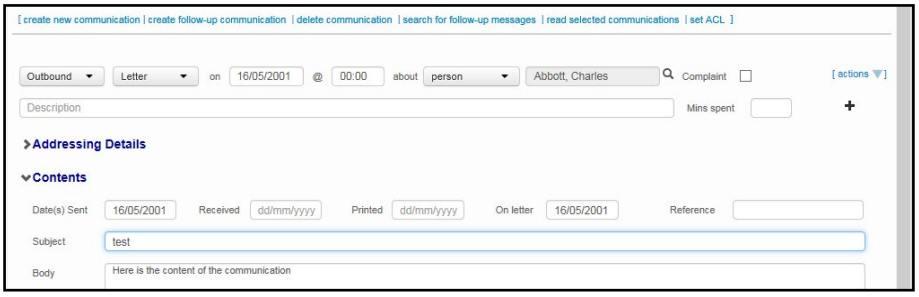
8. Highlight a communication to select it.

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

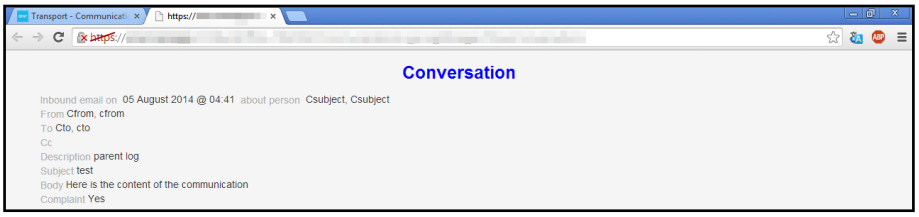
Reading Communication Messages

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.

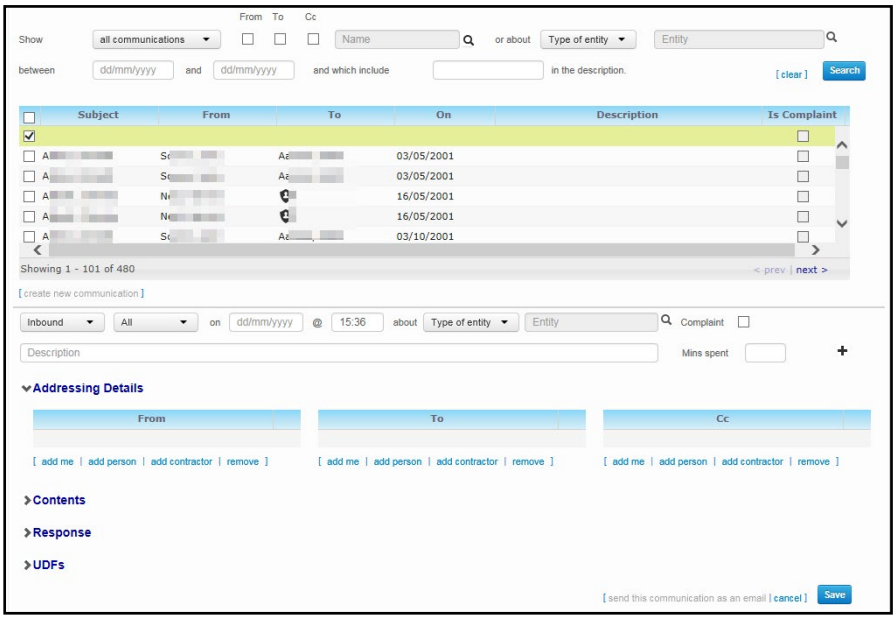


Sending a Communication via Email

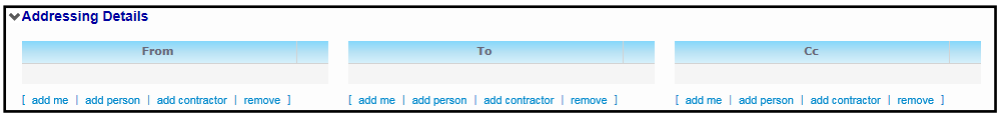
1. Select a communication. For more information on selecting communications, see Selecting a Communication on page *76*.
2. Click the **send this communication as an email** hyperlink. An email with the same subject and body as the communication opens in your default email client.

Recording a Communication

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



3. Select a communication type from the leftmost drop-down menu. The available options are **Inbound** and **Outbound**.
4. Select a communication method from the **Email** menu. The available options are **All**, **Email**, **Telephone**, **SMS**, **Fax**, **Letter** and **Other**.
5. Enter the date and time that the communication was received into the **on** and **@** fields.
6. Select the subject of the communication:
   a. Select a subject type from the **Type of entity** menu. The available options are **person** and **contractor**.
   b. Click the **Entity** browse. Either the **Select a person** or **Select Contractor** dialog is displayed, depending on the option you selected.
   c. Enter search criteria and then **Select** the desired person or contractor.
7. If required, select the **Complaint** check box. Selecting the **Complaint** check box displays the **Complaint Details** section further down the page.
8. Enter a **Description** for the communication. Note that this field should contain a description of the communication, rather than the actual content of the communication.
9. Enter the number of **Mins spent** on the communication.
10. Ensure that the **Addressing Details** section is open. Enter sender and recipient details into the **From**, **To** and **Cc** sections. Each of these sections is managed using the same set of functions:



- **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.

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

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

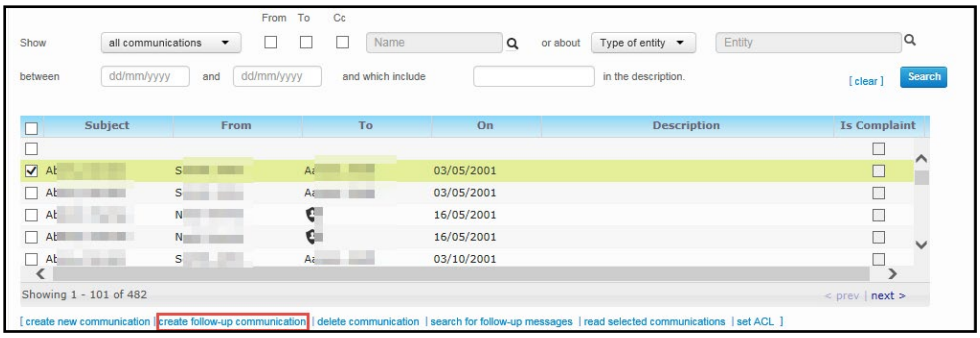
13. If the communication is a complaint, fill out the **Complaint Details** section:

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

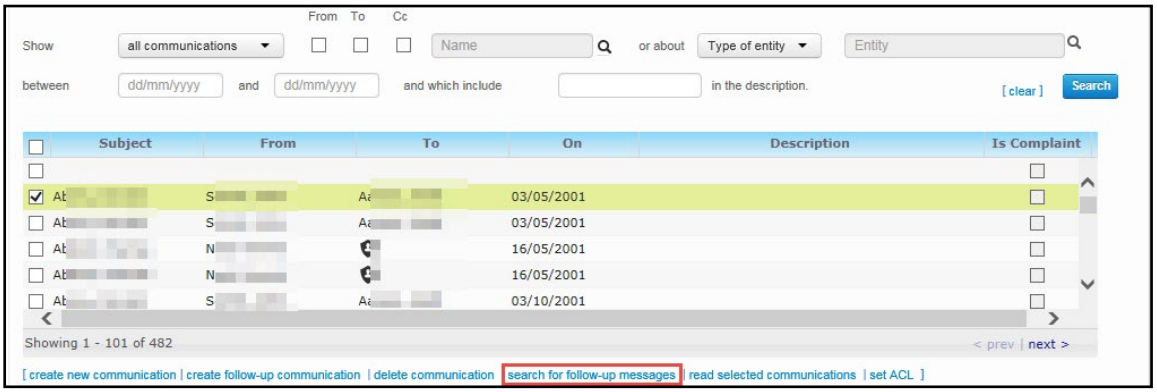
1. Select a communication. For more information on selecting communications, see Selecting a Communication on page *76*.
2. Click the **create follow-up communication** hyperlink.



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

Selecting a Follow-Up Message

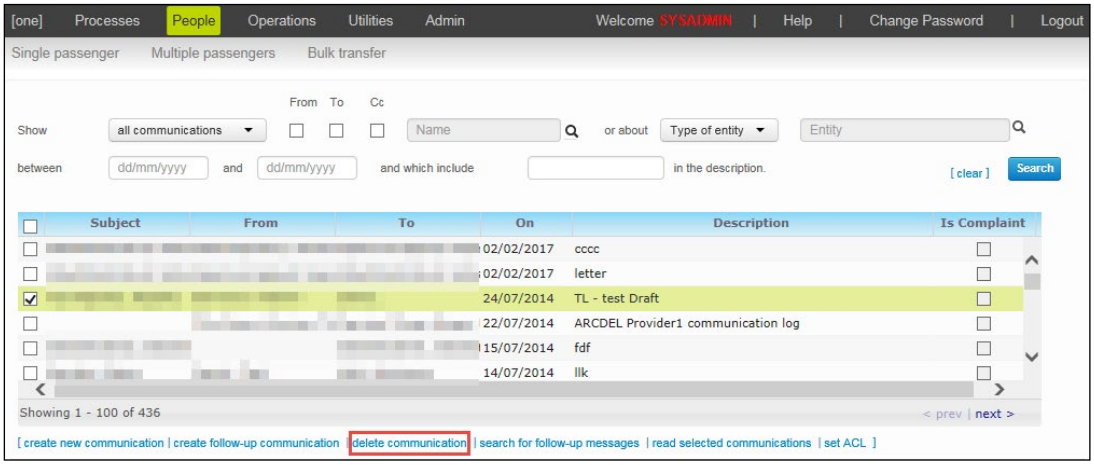
1. Select a communication. For more information on selecting communications, see Selecting a Communication on page *76*.
2. Click the **search for follow-up messages** hyperlink. A list of the selected communication's follow-up messages is displayed.



3. Highlight a message to select it.

Deleting a Communication

1. Select a communication. For more information on selecting communications, see Selecting a Communication on page *76*.
2. Click the **delete communication** hyperlink. A confirmation dialog is displayed.



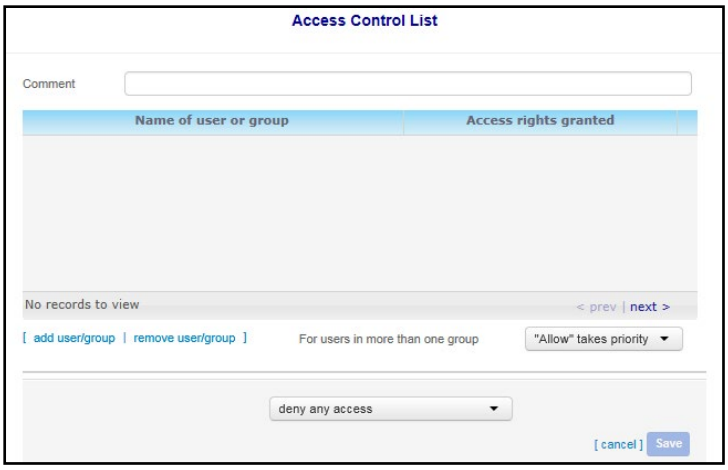
3. Click the **Delete** button to delete the communication.

Managing the Access Control List for Communications

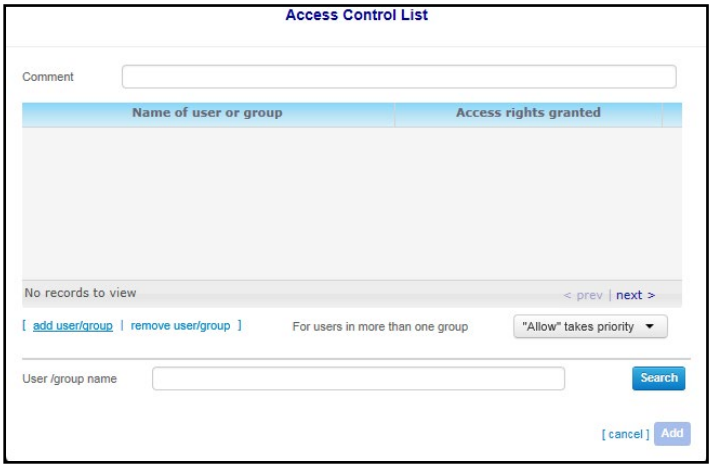
One Transport features an Access Control List for communications, allowing you to restrict access to a given communication to a specific user or group.

Adding a User/Group to the ACL

1. Select a communication. For more information on selecting communications, see Selecting a Communication on page *76*.
2. Click the **set ACL** hyperlink. The **Access Control List** dialog is displayed.



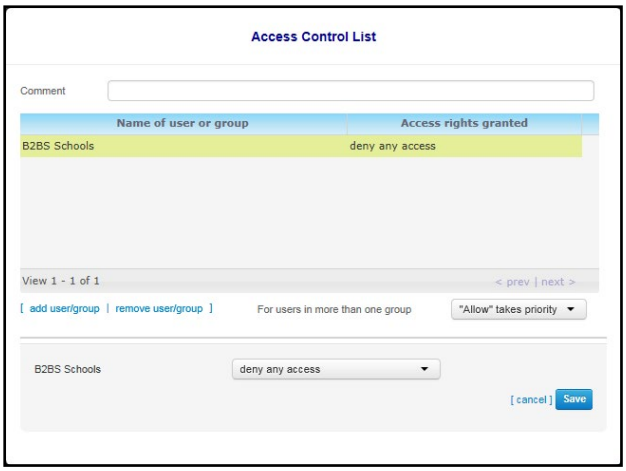
3. Click the **add user/group** hyperlink. The **Name of user or group** list is displayed.



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 Selecting a Communication 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.



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 Selecting a Communication 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 15th. In this case you could create the new stop ahead of time, setting its **Start Date** to the 15th, before setting the **End Date** of the old stop to July 14th.

Managing Stops

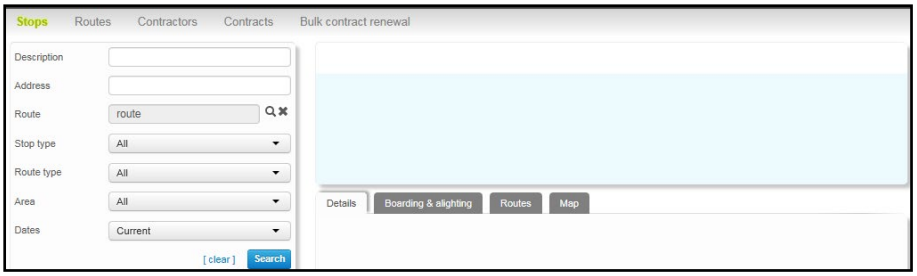
The **Operations | Stops** page enables you to view and manage stops within One Transport.

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.



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 One Publications 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.

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.*

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

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.

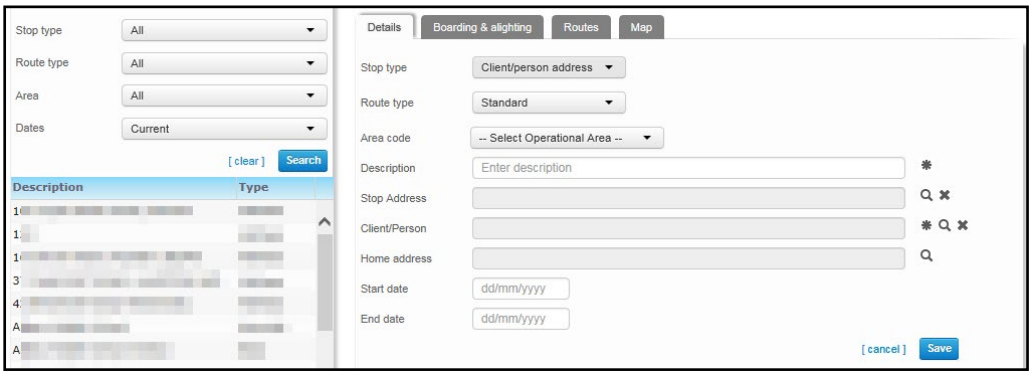
b. Select the base that is associated with the stop:
   i. Click the **Base** browse to display the **Choose a base** dialog.
   ii. Enter search criteria and then click the **Search** button to view a list of bases that match the entered criteria.
   iii. Highlight the desired base and then click the **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:

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:



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

c. Select the person's home address:

i. Click the **Home address** browse to open the **Choose an address** dialog.

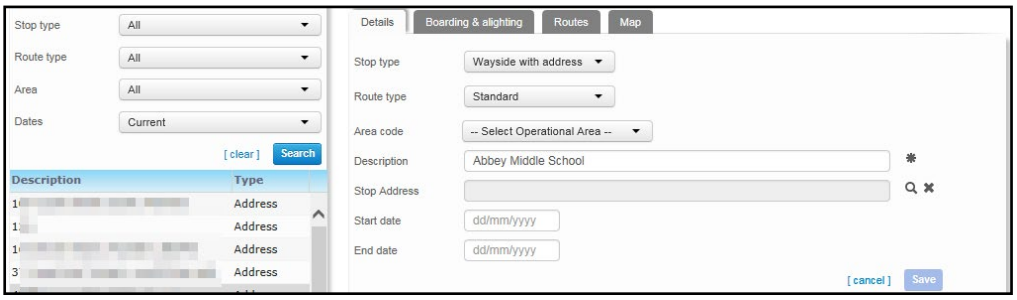
ii. Enter a postcode or address line into the search bar and then click the **Search** button to display matching addresses.

iii. Highlight an address and then click the **Select this address** button to select the address and close the dialog.

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

Editing Stop Details

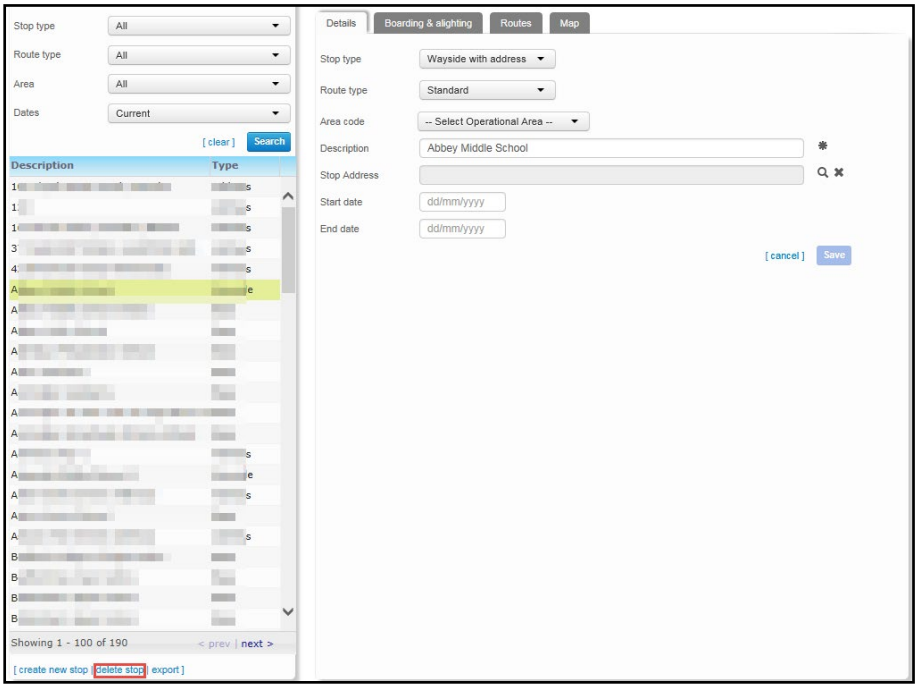
1. Select a stop. For more information on selecting stops, see Selecting a Stop on page *83*.
2. Ensure that the **Details** tab is selected. Editable fields related to the stop are displayed.



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 Selecting a Stop on page *83*.
2. Click the **delete stop** hyperlink. A confirmation dialog is displayed.

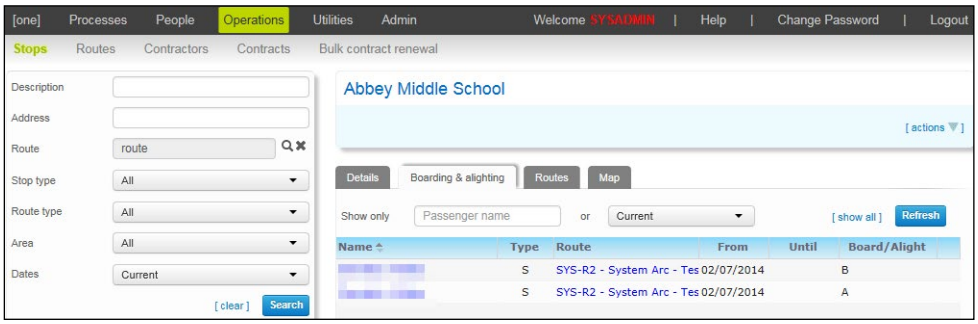


3. Click the **Delete** button to delete the stop.

> ***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* *Editing the Stops on a Route on page 95.*

Viewing Passengers Boarding or Alighting at a Particular Stop

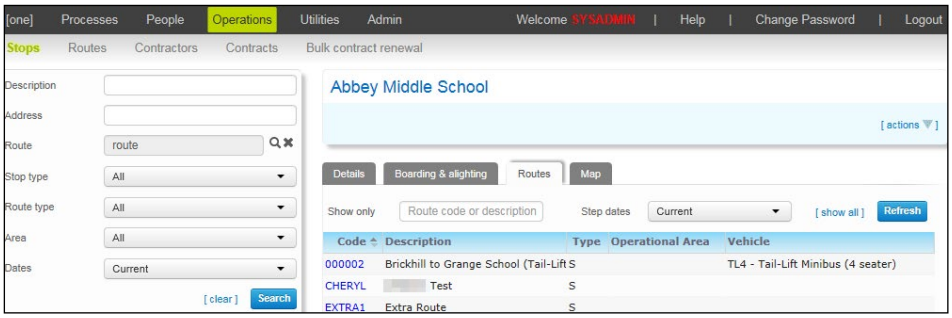
1. Select a stop. For more information on selecting stops, see Selecting a Stop on page *83*.
2. Select the **Boarding & alighting** tab. A list of the passengers who board or alight at the stop is displayed.



3. 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.

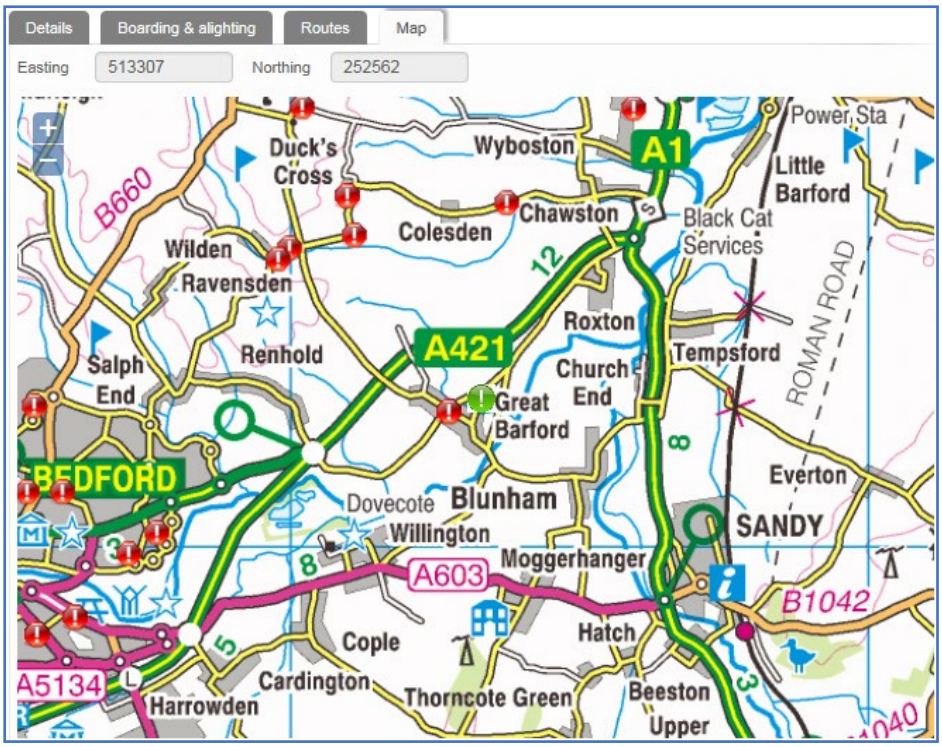


3. If required, enter a **Route code or description** and select whether you want to search for **Current**, **Past**, **Future, Current and Future** or **All** routes, Click the **Refresh** button to filter your search results.

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 Selecting a Stop 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.

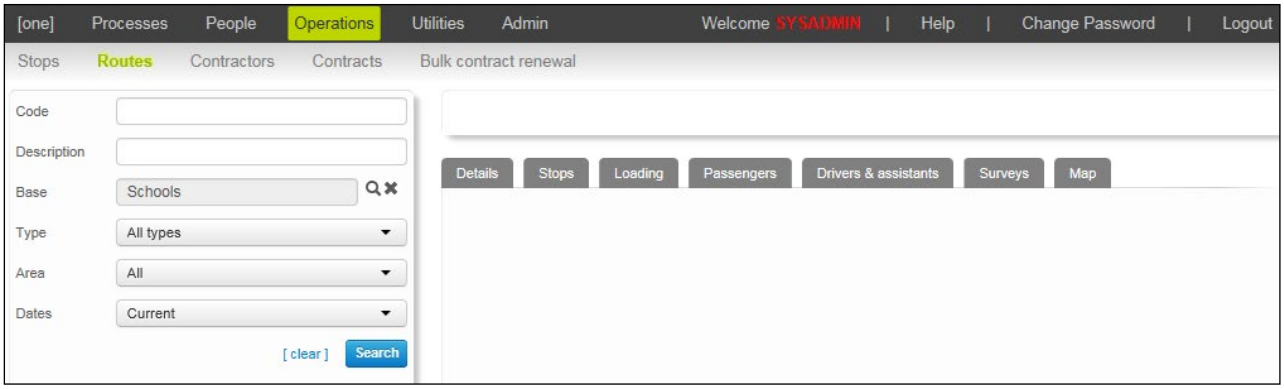
On a door-to-door route, the LA supplies transport to pick up a passenger at a specific address or stop and then take that passenger to another address or stop.

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.



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.

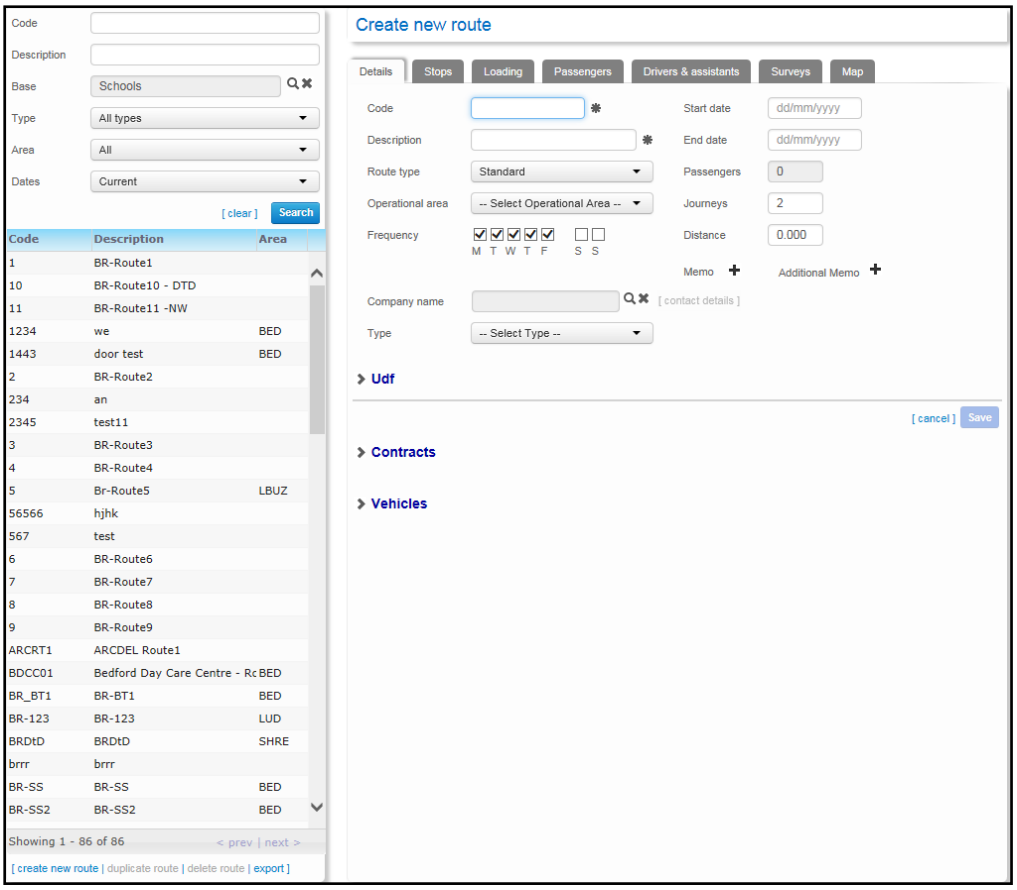
> ***NOTE:*** *To export the returned search results into a spreadsheet file, click the* ***export*** *hyperlink at the bottom of the list.*

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 One Publications 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.



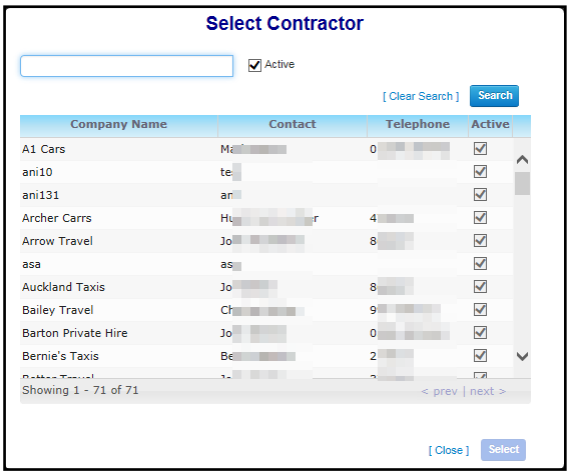
4. Enter a **Code** for the route.
5. Enter a **Description** for the route.
6. Select the **Route type**. The available options are **Standard**, **Network** and **Door to door**.
7. Select **Operational area** and **Frequency** as required.
8. Enter **Start date**, **End date**, **Journeys**, and **Distance**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



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 Creating a Contract on page *117*.

11. If required, add vehicle details. For more information, see Adding a Vehicle to a Route on page *93*.

12. Click the **Save** button to save your changes.

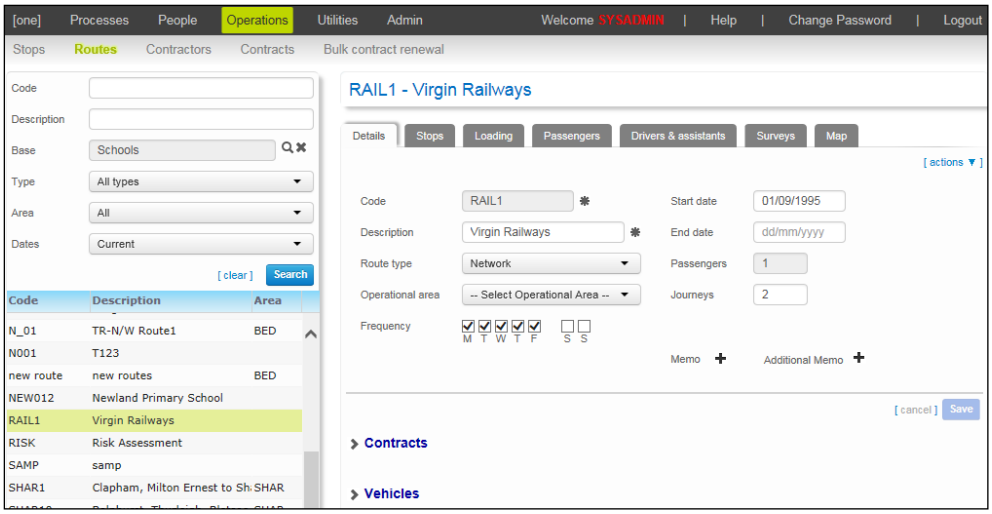
Editing a Route

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 Selecting a Route on page *90.*

2. Ensure that the **Details** tab is selected. Editable fields related to the route's details are displayed.



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

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

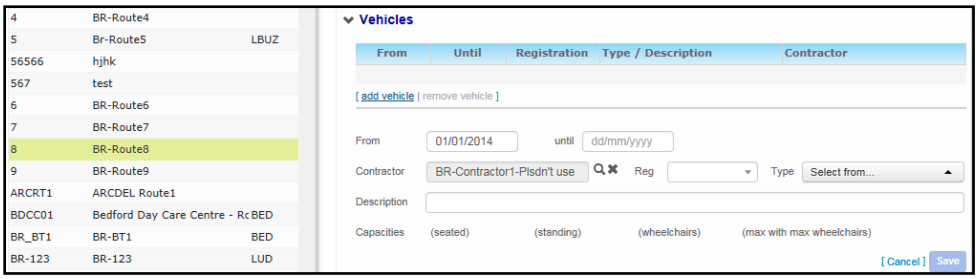
Viewing Route Contract Details

1. Select a route. For more information on selecting routes, see Selecting a Route 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.

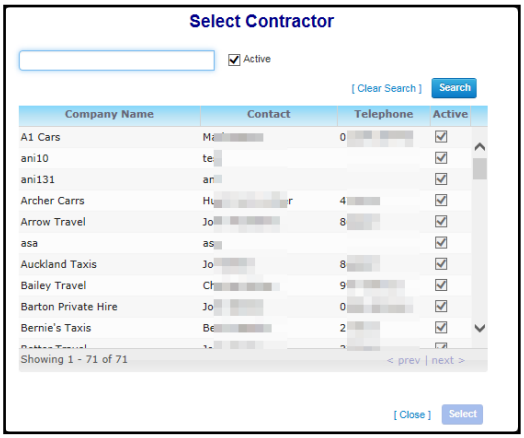
> ***NOTE:*** *If the selected route does not have a contract associated with it, the **create contract** hyperlink is displayed in the **Contracts** section. Click this link to open the **Operations | Contracts | create new contract** page in a new window. For more information on creating contracts, see Creating a Contract on page 117.*

Adding a Vehicle to a Route

1. Select a route. For more information on selecting routes, see Selecting a Route 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.



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.



   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* *Managing a Contractor's Individual Vehicles 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 Selecting a Route 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.

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.

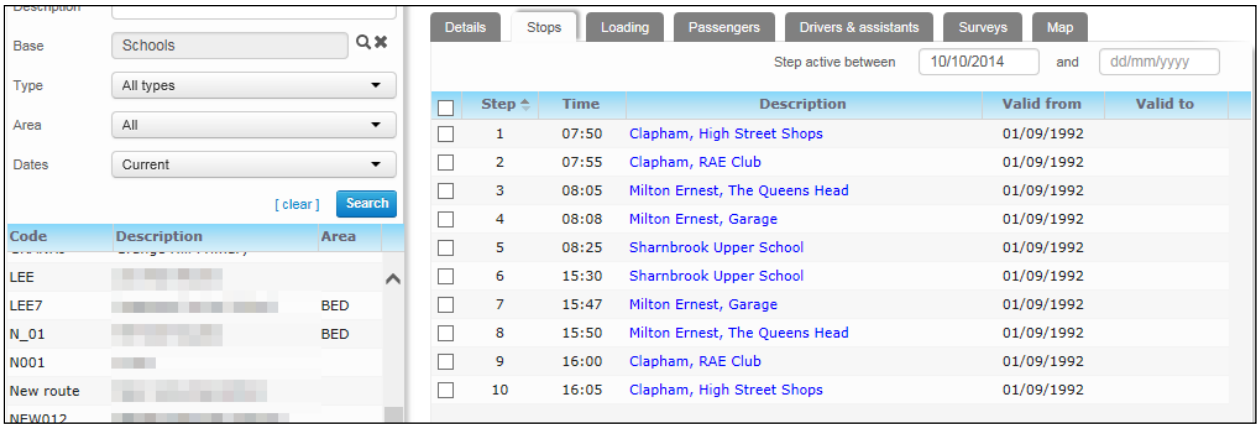
Editing the Stops on a Route

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 Editing Stop Details on page *87*.

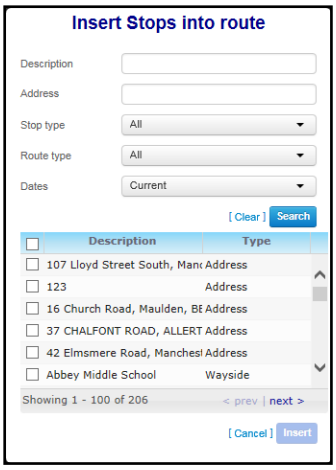
Adding Stops to a Route

1. Select a route. For more information on selecting routes, see Selecting a Route on page *90*.
2. Select the **Stops** tab to view 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 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.

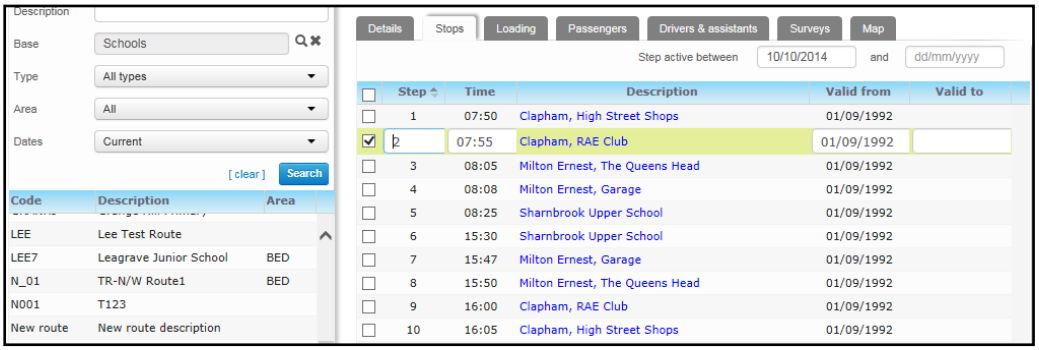


4. Enter search criteria and then click the **Search** button to display a list of matching stops.
5. Highlight the stop that you want to add and then click the **Insert** button to insert the stop into the route.

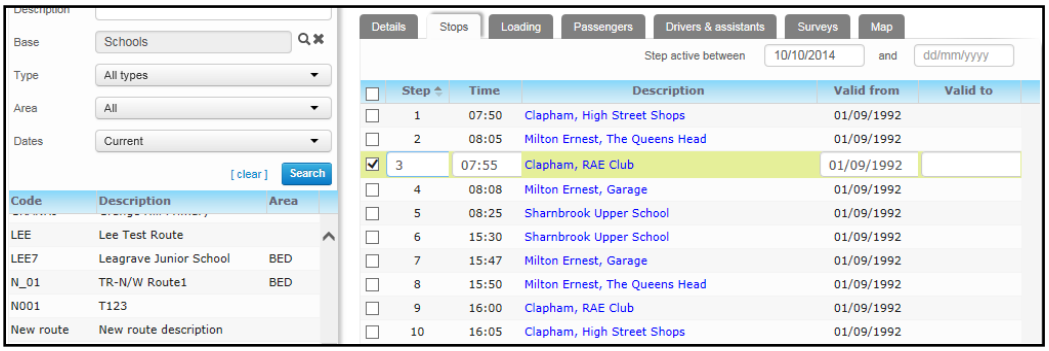
> ***NOTE:*** *Transport routes are optimised to work with up to 50 stops. Performance may be affected if you add more than 50 stops to a route.*

Re-Ordering the Stops on a Route

1. Select a route. For more information on selecting routes, see Selecting a Route 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.



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



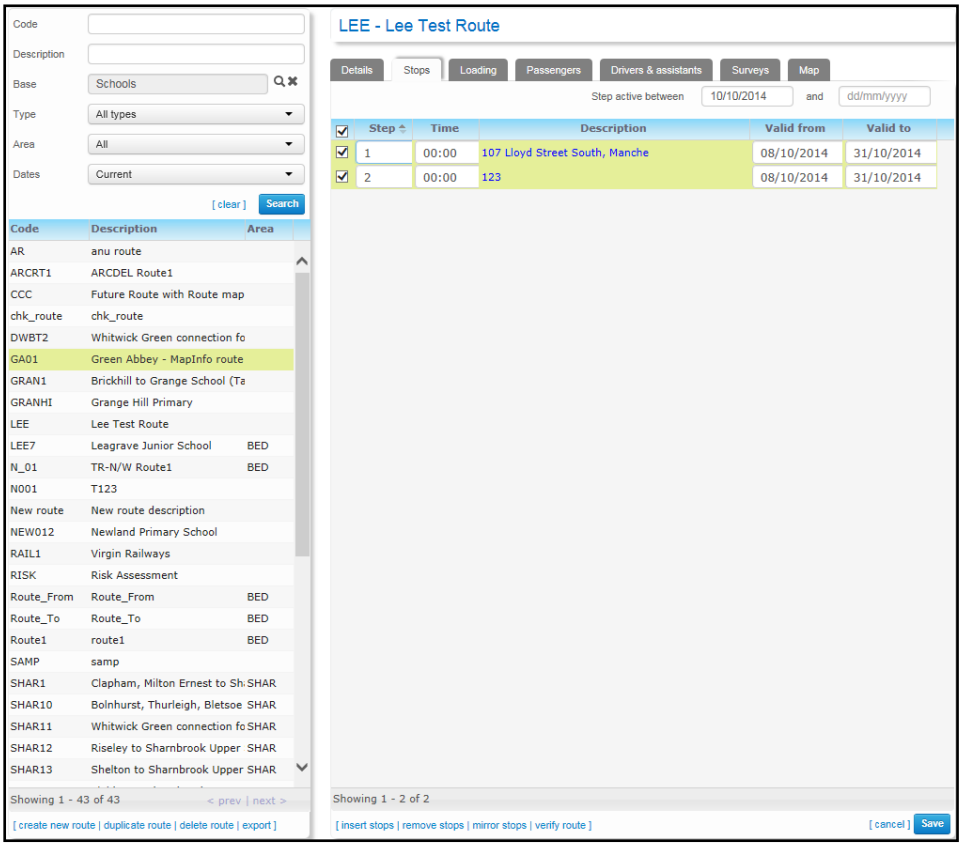
5. If required, repeat step three for all the stops you want to re-order.
6. Click the **Save** button to save your changes.

Mirroring the Stops on a Route

1. Select a route. For more information on selecting routes, see Selecting a Route 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.*

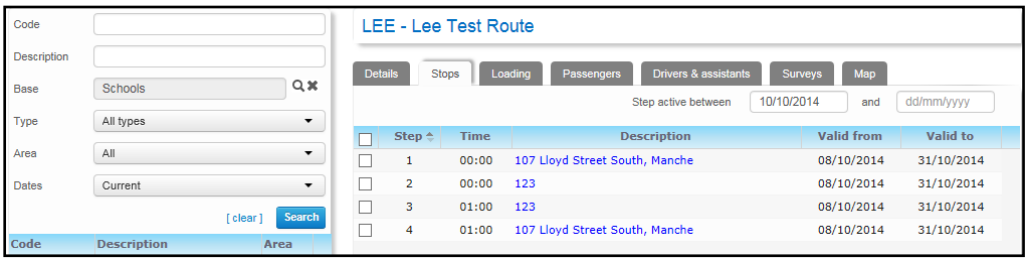
3. Select the check boxes to select the stops you want to mirror.



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.*

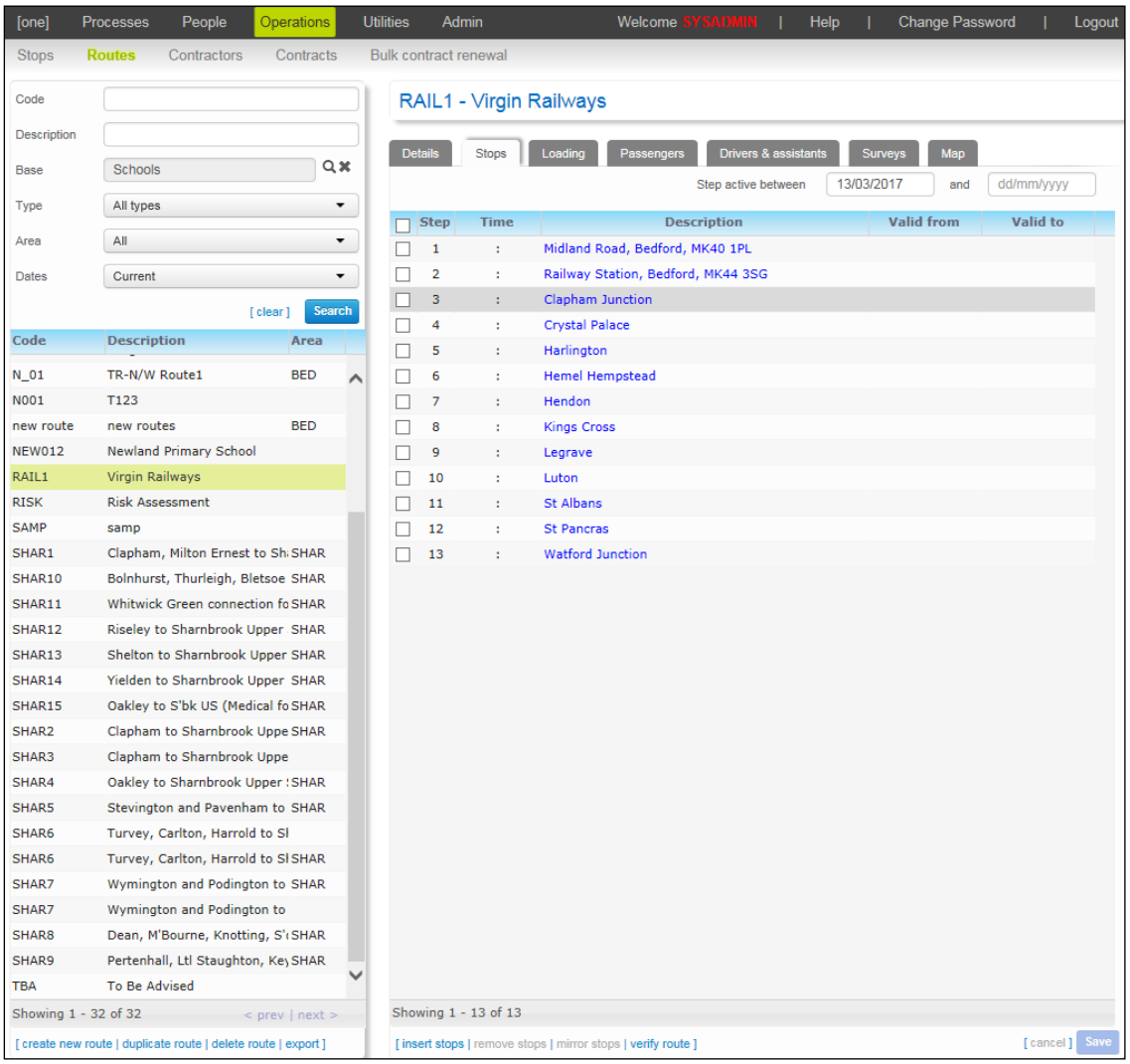


Removing a Stop from a Route

1. Select a route. For more information on selecting routes, see Selecting a Route 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.*

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

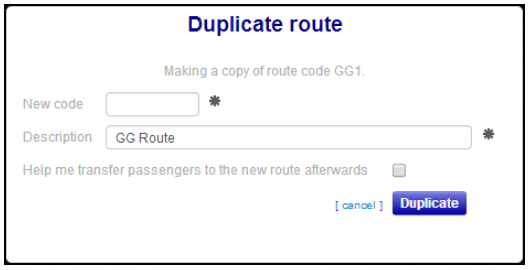


4. Click the **remove stops** hyperlink. A warning dialog is displayed.
5. Click the **Yes** button to delete the selected stop from the route.

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 Selecting a Route on page *90*.
2. Click the **duplicate route** hyperlink to display the **Duplicate route** dialog.



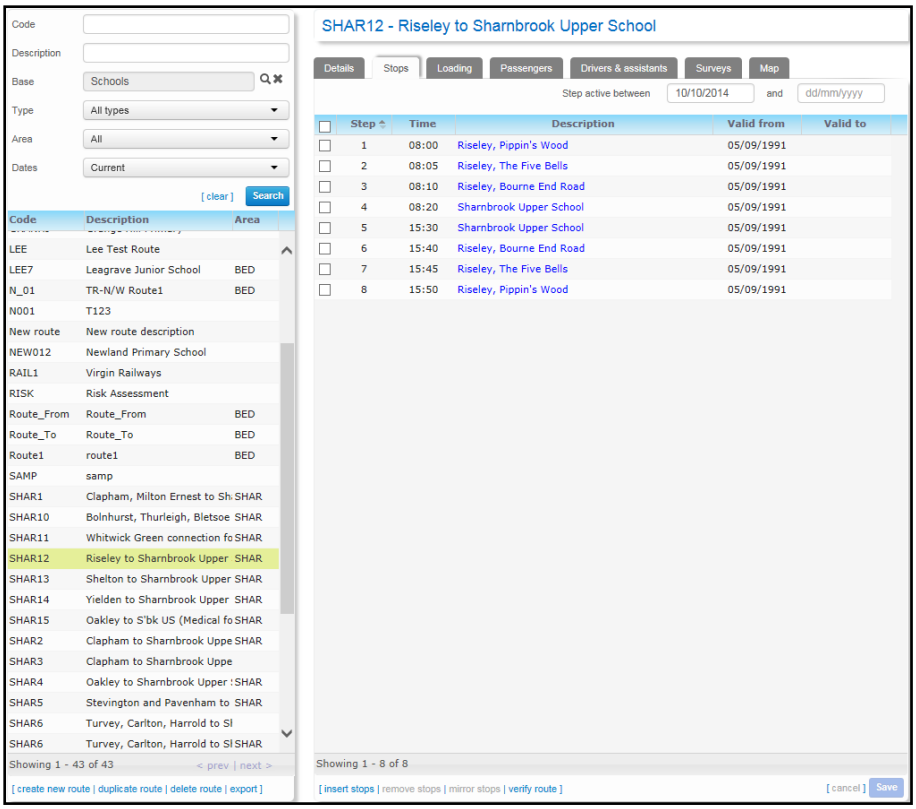
3. Enter a **New code** for the duplicate route.
4. Enter a **Description** for the duplicate route.
5. If required, select the **Help Me Transfer Passengers to the New Route Afterwards** check box.

   This check box opens the **Processes | Bulk Transfer** menu. For more information on using the Bulk Transfer menu, see Bulk Transferring Journeys to a New Route 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 Selecting a Route 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.



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

Deleting a Route

1. Select a route. For more information on selecting routes, see Selecting a Route 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.

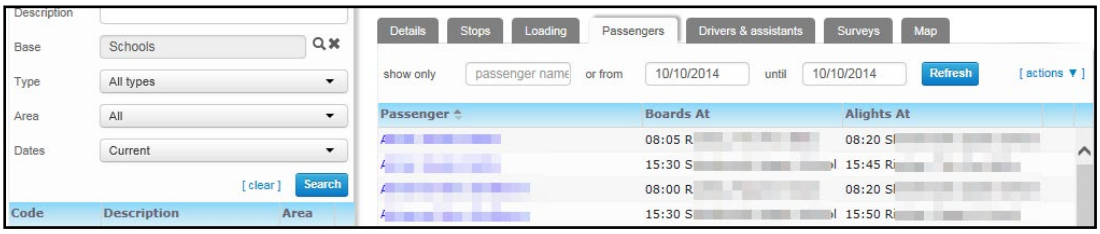
Viewing Route Loading Details

1. Select the route you want to view. For more information on selecting routes, see Selecting a Route 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 Selecting a Route 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.

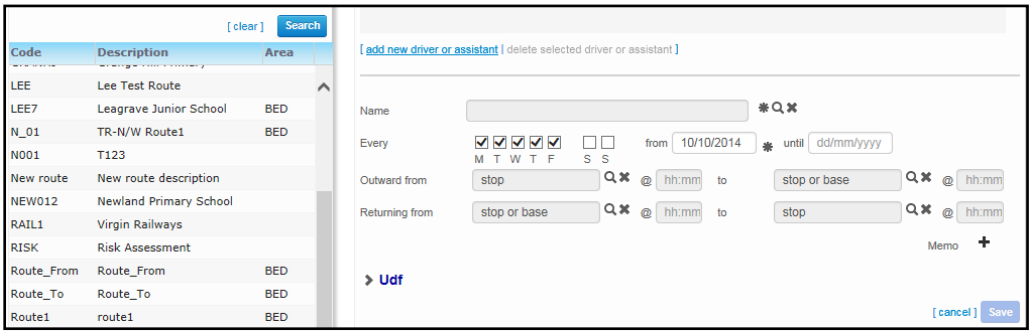


3. If required, enter a **passenger name** and select valid dates from the **from** and **until** fields. Click the **Refresh** button to filter your search results.

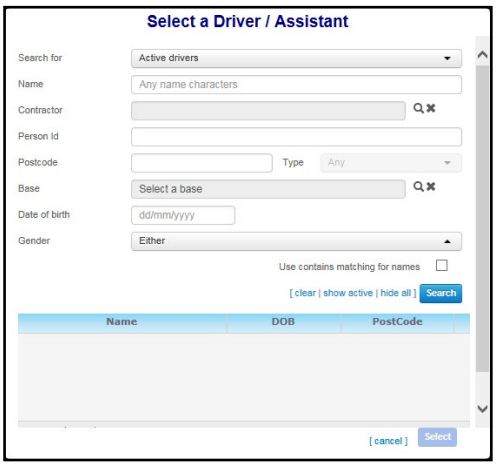
Managing a Route's Drivers/Passenger Assistants

Assigning a Driver/Passenger Assistant to a Route

1. Select a route. For more information on selecting routes, see Selecting a Route on page *90*.
2. Select the **Drivers & assistants** tab.
3. Click the **add a new driver or assistant** hyperlink to display editable fields related to driver and assistant details.



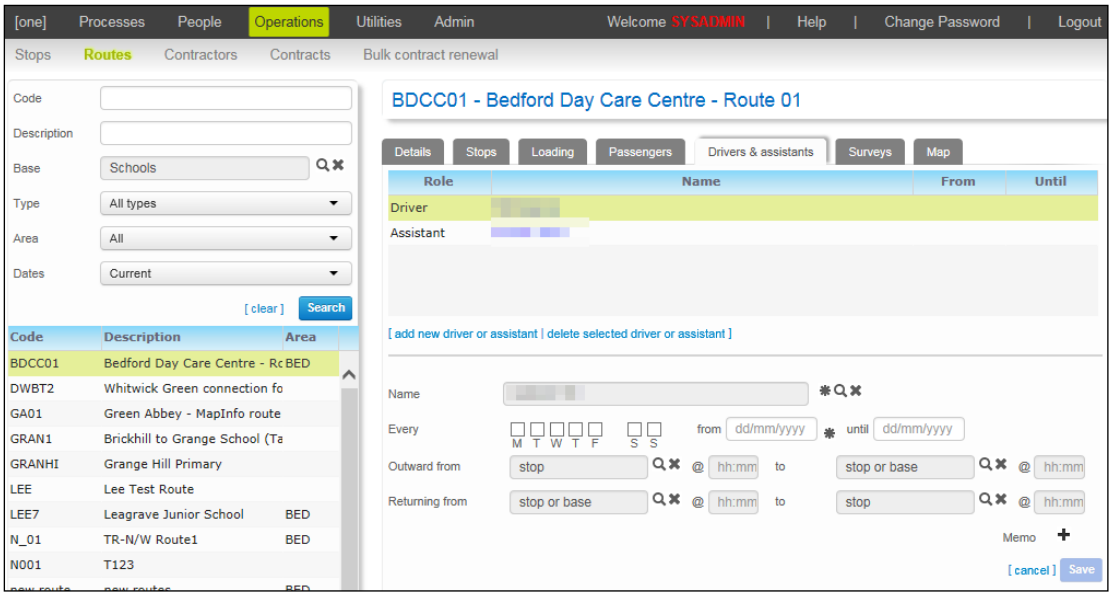
4. Select the driver/assistant you want to add.
   a. Click the **Name** browse to display the **Select a Driver/Assistant** dialog.



   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 Selecting a Route on page *90*.
2. Select the **Drivers & assistants** tab.
3. Highlight the driver/assistant you want to delete.

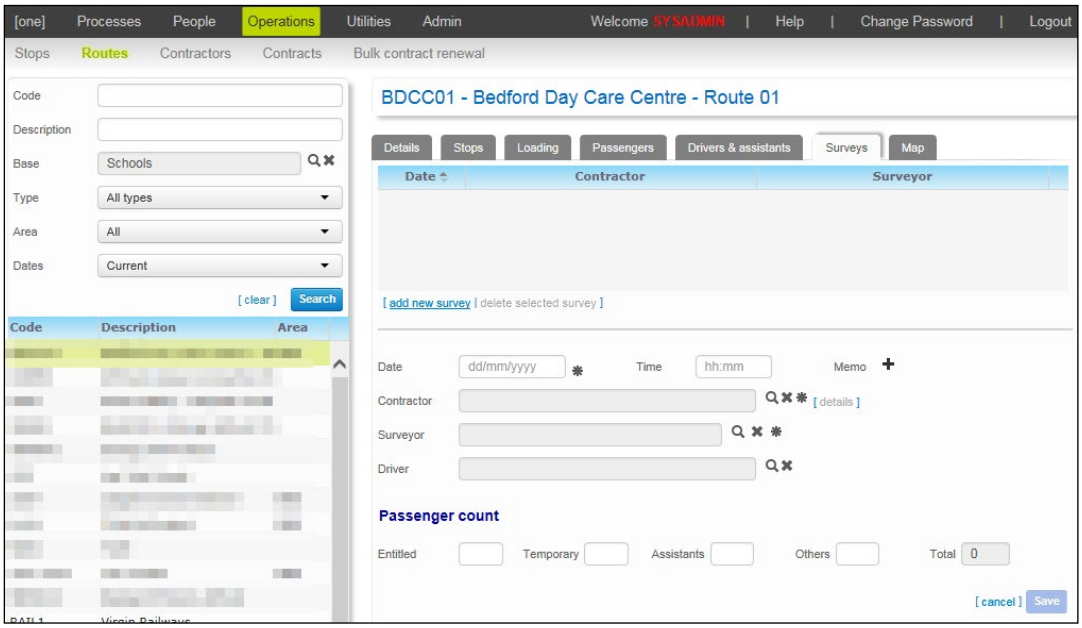


4. Click the **delete selected driver or assistant** hyperlink. A confirmation dialog is displayed.
5. Click the **Delete** button to delete the driver/assistant from the route.

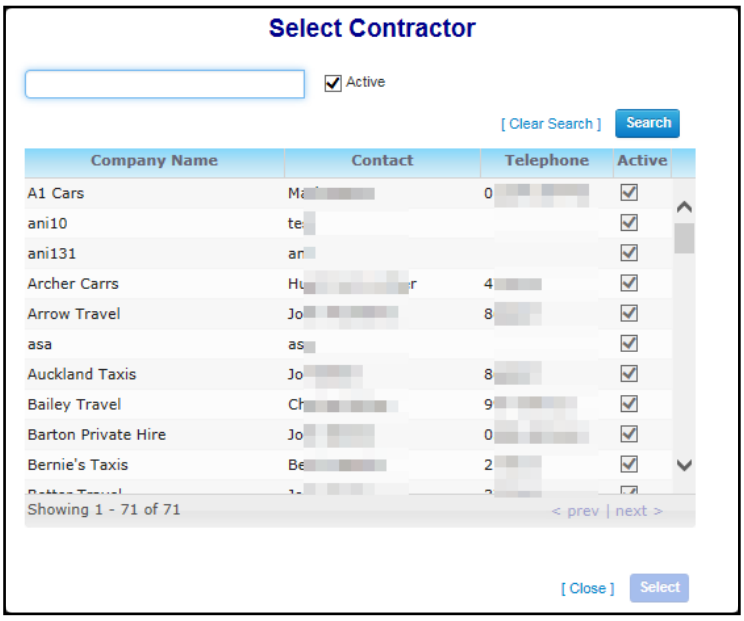
Recording a Route Survey

Adding a Route Survey

1. Select a route. For more information on selecting routes, see Selecting a Route on page *90*.
2. Select the **Surveys** tab.
3. Click the **add new survey** hyperlink to display editable fields relating to survey details.

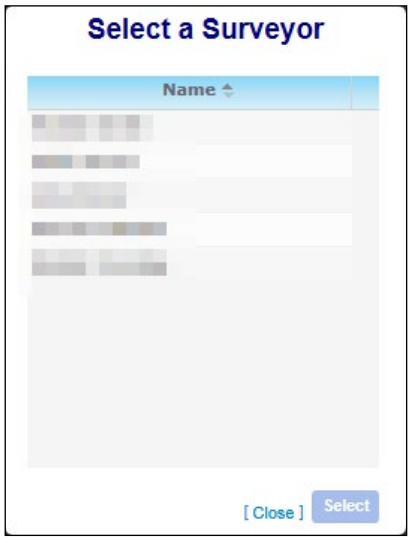


4. Enter the **Date** that the survey took place.
5. If required, add the **Time** of the survey.
6. Select the contractor used on the route:
   a. Click the **Contractor** browse to display the **Select Contractor** dialog.

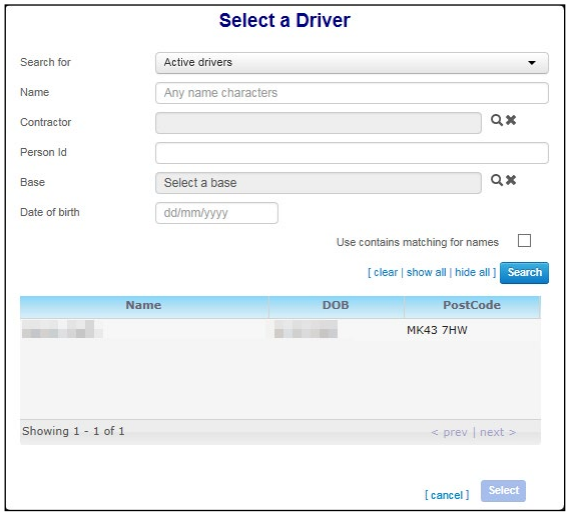


   b. Enter the name of the contractor into the search field and then click the **Search** button.
   c. Highlight the contractor and then click the **Select** button to select that contractor and close the dialog.

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



   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.

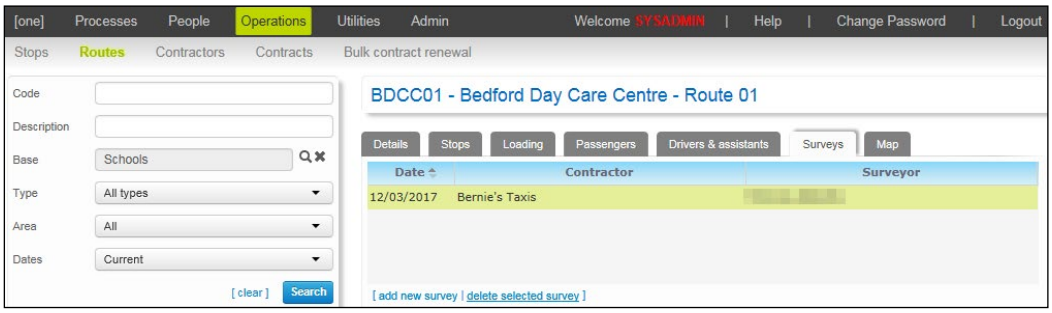


   b. Enter search criteria and click the **Search** button. A list of matching drivers/assistants is displayed.
   c. Select the driver/assistant you want to add and then click the **Select** button to select that person and close the dialog.
9. If required, enter the passenger count for the surveyed journey 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* *Managing Vehicle Checks on page 111.*

Deleting a Route Survey

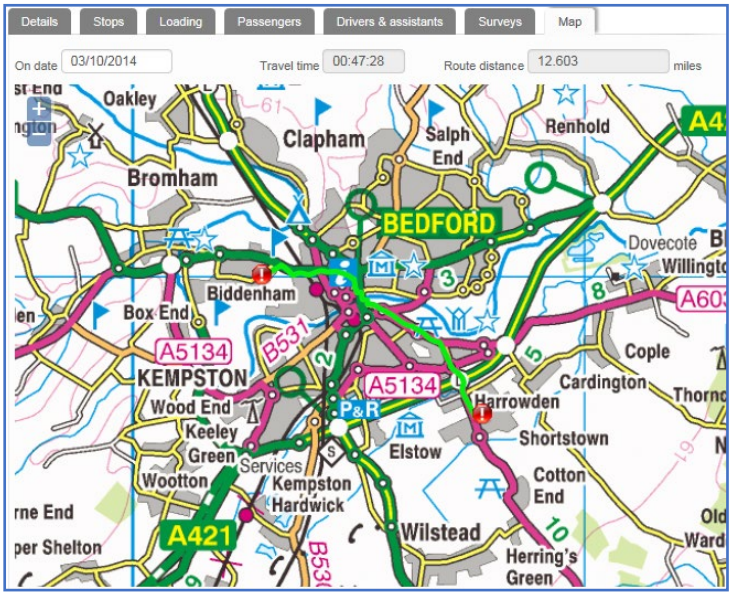
1. Select a route. For more information on selecting routes, see Selecting a Route on page *90*.
2. Select the **Surveys** tab.
3. Highlight the survey you want to delete.



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 Selecting a Route 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.

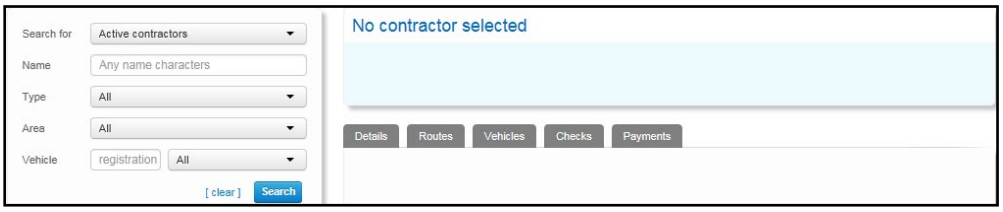
Details of individual contracts, including costs, revisions and budget codes, are managed through the **Operations | Contracts** screen. In addition, you can renew existing contracts in bulk from the **Operations | Bulk contract renewal** screen.

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.



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.

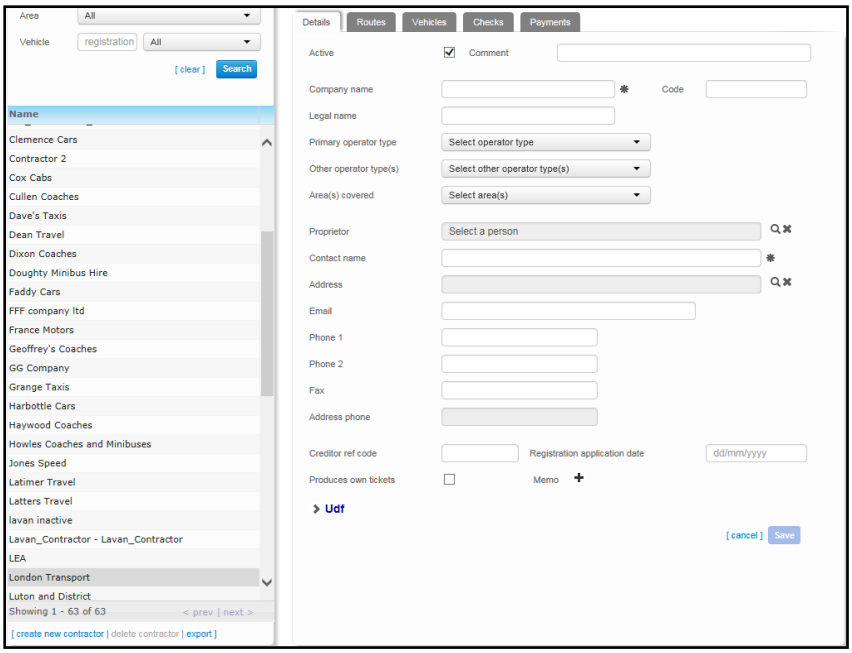
> ***NOTE:*** *To export the returned search results into a spreadsheet file, click the* ***export*** *hyperlink at the bottom of the list.*

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 One Publications website.*

Adding a Contractor

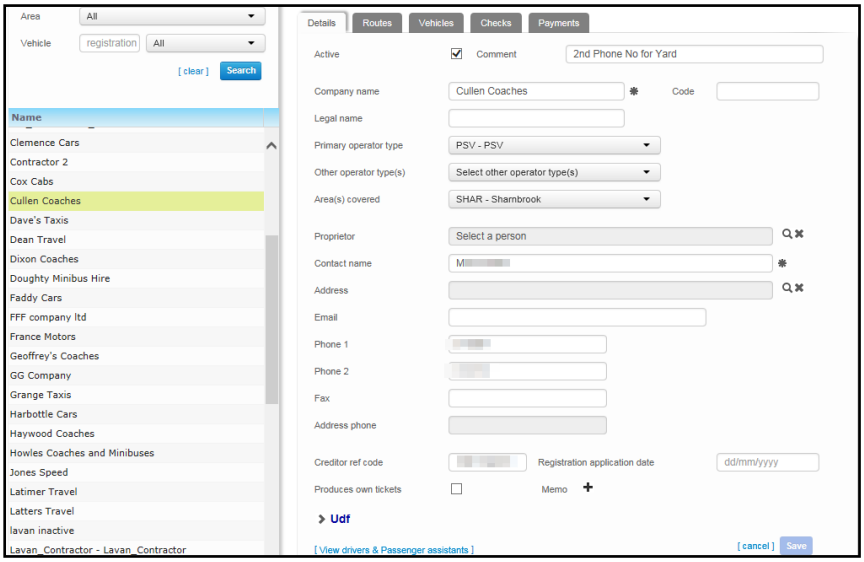
1. Select the **Operations** area and open the **Contractors** page.
2. Click the **Search** button and then click the **create new contractor** hyperlink. Editable fields related to contractor details are displayed.



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

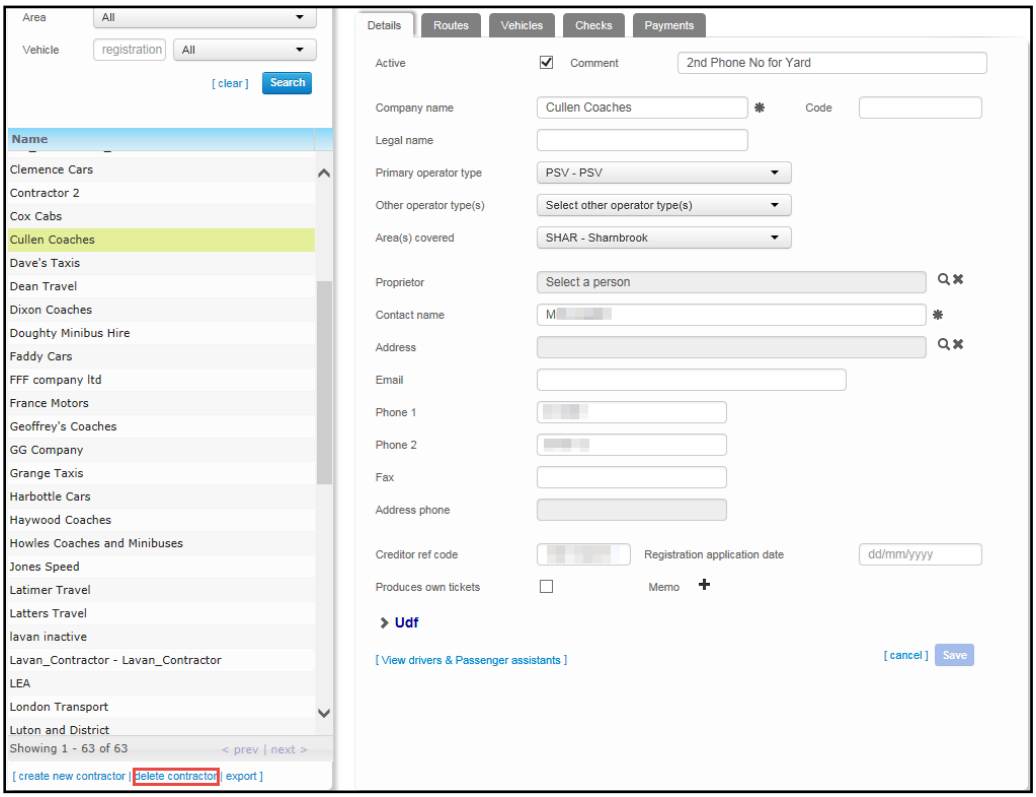
1. Select a contractor. For more information on selecting contractors, see Selecting a Contractor on page *105*.
2. Ensure that the **Details** tab is selected. Editable fields relating to contractor details are displayed.



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

Deleting a Contractor

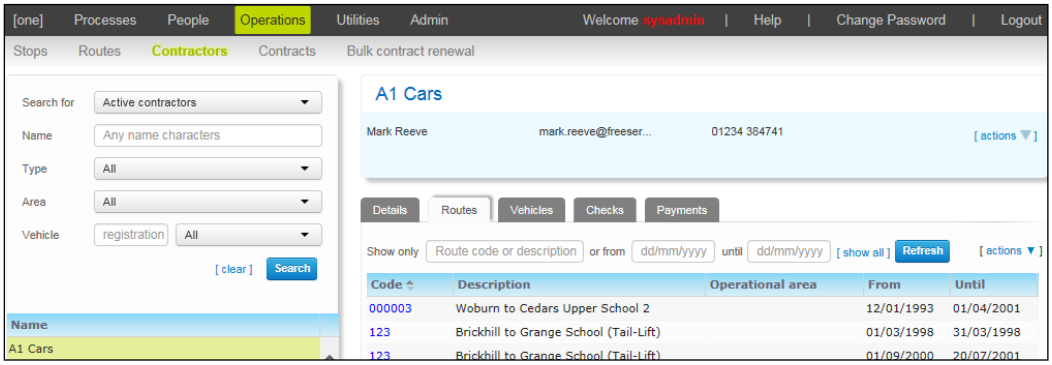
1. Select a contractor. For more information on selecting contractors, see Selecting a Contractor on page *105*.
2. Highlight the contractor that you want to delete and then click the **delete contractor** hyperlink. A confirmation dialog is displayed.



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 Selecting a Contractor on page *105*.
2. Select the **Routes** tab to display a list of all routes serviced by that contractor.



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.

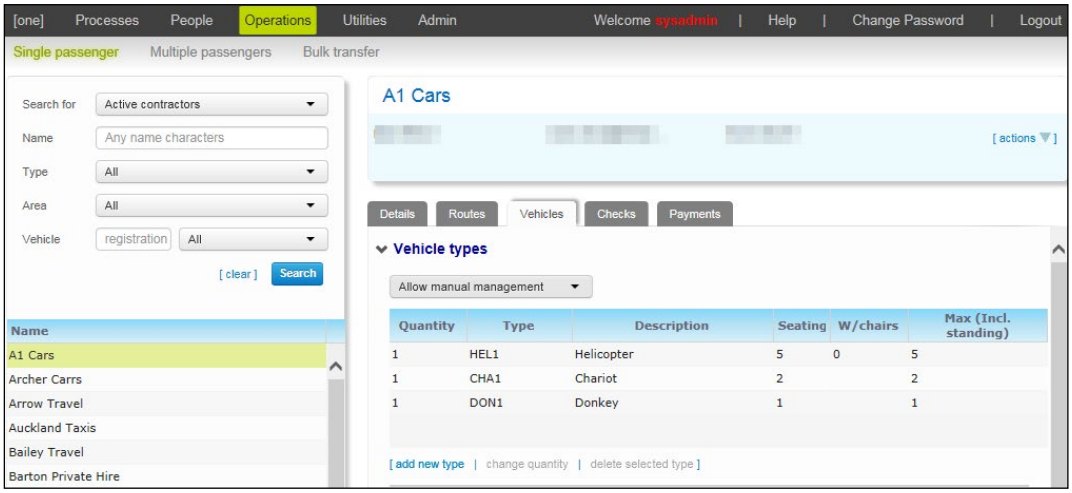
You can configure One Transport to manage a contractor's listed vehicle types automatically by selecting **Manage automatically** from the drop-down menu at the top of the **Vehicle types** section. With **Manage automatically** selected, One Transport populates the **Vehicle types** section using the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

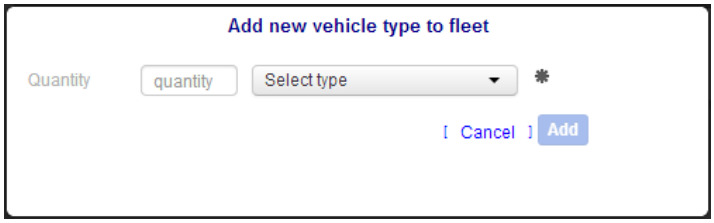
Adding a Vehicle Type to a Contractor

You can only add those vehicle types that have already been created in Transport to contractors. For more information on creating vehicle types, see *Creating a Vehicle Type* on page 150.

1. Select a contractor. For more information on selecting contractors, see Selecting a Contractor 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.



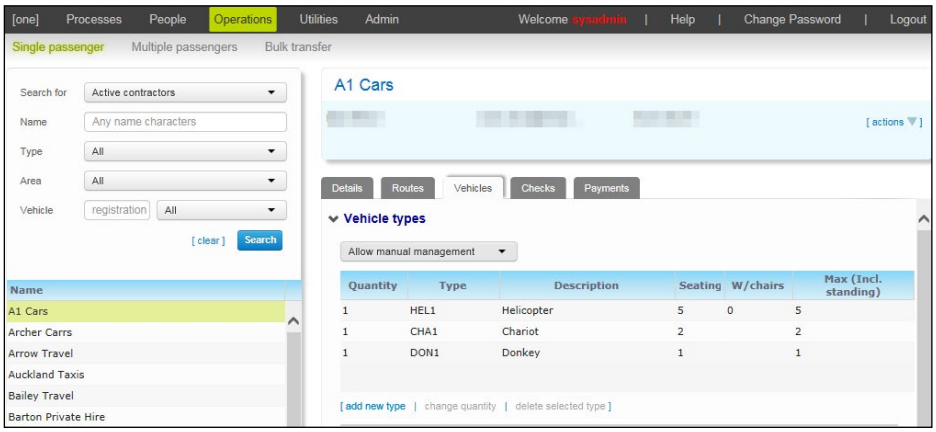
3. Ensure that **Allow manual management** is selected from the drop-down menu at the top of the section and then click the **add new type** hyperlink to display the **Add new vehicle type to fleet** dialog.



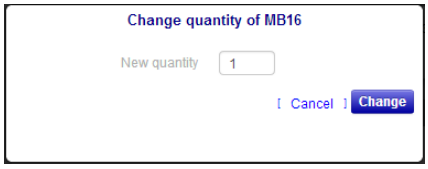
4. Select the type of vehicle you want to add from the **Select type** menu.
5. Enter the **quantity** of vehicles of that type that the contractor operates.
6. Click the **Add** button to add the selected quantity of vehicles and close the dialog.

Changing a Contractor's Vehicle Type Quantity

1. Select a contractor. For more information on selecting contractors, see Selecting a Contractor 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.



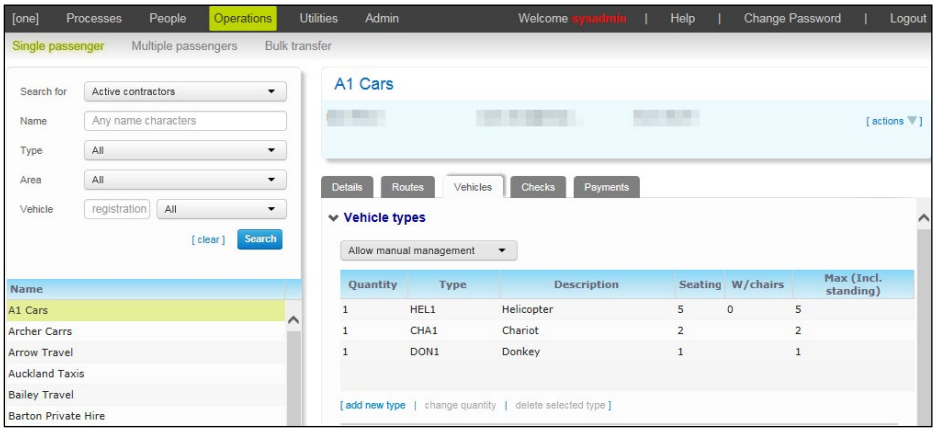
3. Ensure that **Allow manual management** is selected from the drop-down menu at the top of the section and then highlight a vehicle type.
4. Click the **change quantity** hyperlink to display the **Change quantity of** dialog.



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 Selecting a Contractor 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.



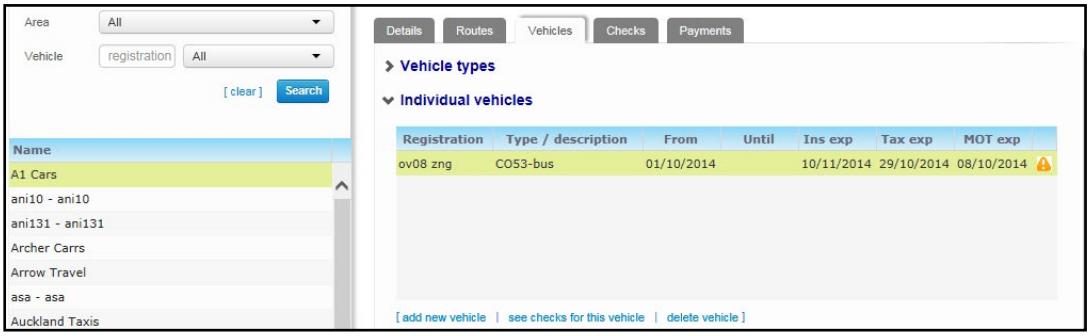
3. Ensure that **Allow manual management** is selected from the drop-down menu at the top of the section and then highlight a vehicle type. Click the **delete selected type** hyperlink. A confirmation dialog is displayed.
4. Click the **Yes** button to delete the vehicle type and close the dialog.

Managing a Contractor's Individual Vehicles

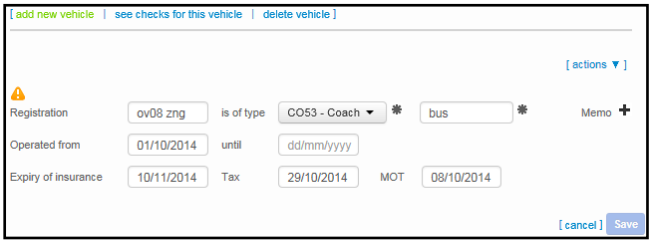
The **Individual vehicles** section of the **Operations | Contractors | Vehicles** tab enables you to record details of the individual vehicles that a particular contractor operates.

Adding an Individual Vehicle to a Contractor

1. Select a contractor. For more information on selecting contractors, see Selecting a Contractor 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.



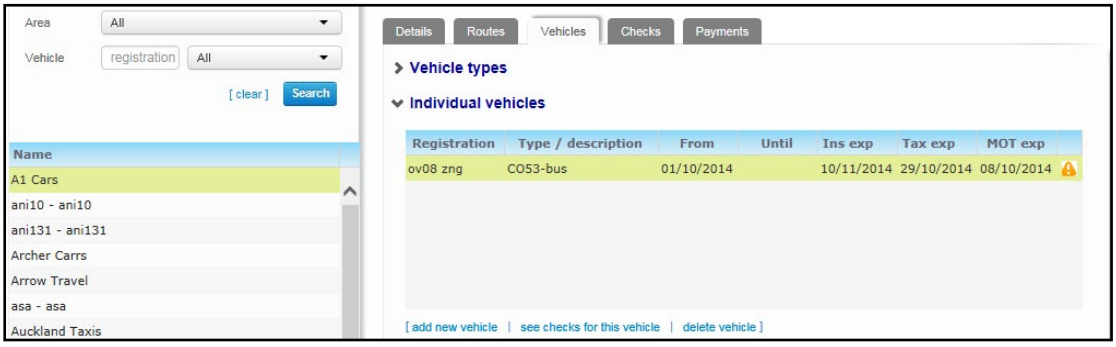
3. Click the **add new vehicle** hyperlink to display editable fields related to vehicle details.



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 Selecting a Contractor 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.



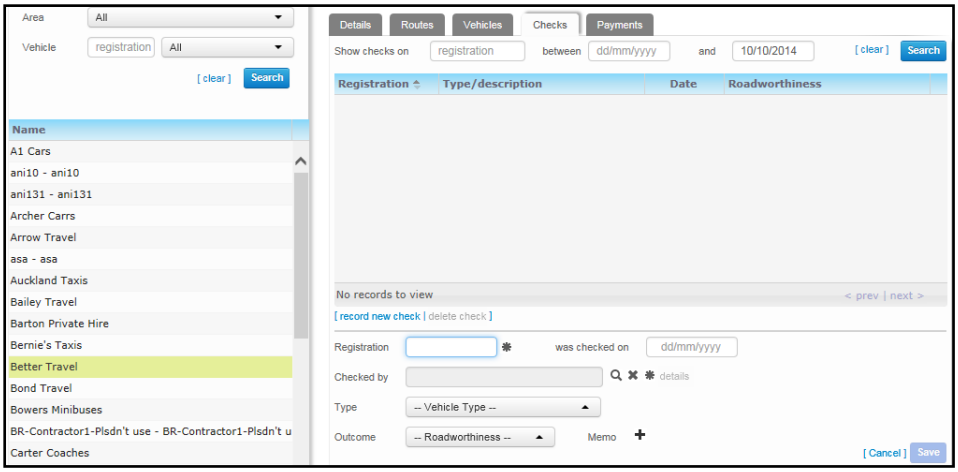
3. Highlight the vehicle you want to delete and then click the **delete vehicle** hyperlink. A confirmation dialog is displayed.
4. Click the **Delete** button to delete the vehicle record.

Managing Vehicle Checks

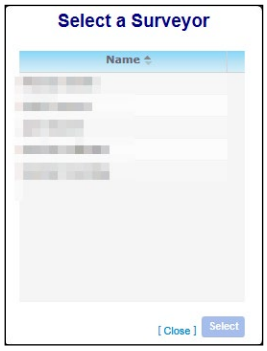
The **Operations | Contractors | Checks** tab enables you to record roadworthiness checks on a contractor's vehicles.

Recording a Vehicle Check

1. Select a contractor. For more information on selecting contractors, see Selecting a Contractor on page *105*.
2. Select the **Checks** tab and then click the **record new check** hyperlink. Editable fields related to vehicle checks are displayed.



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.

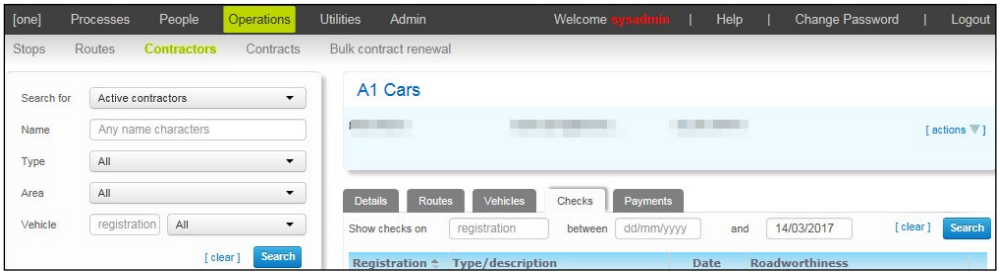
> ***NOTE:*** *The **Select a Surveyor** dialog only lists people who have been previously designated as surveyors. For more information on designating people as surveyors, see Managing Surveyors on page 148.*

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 Selecting a Contractor on page *105*.
2. Select the **Checks** tab to display vehicle search fields.

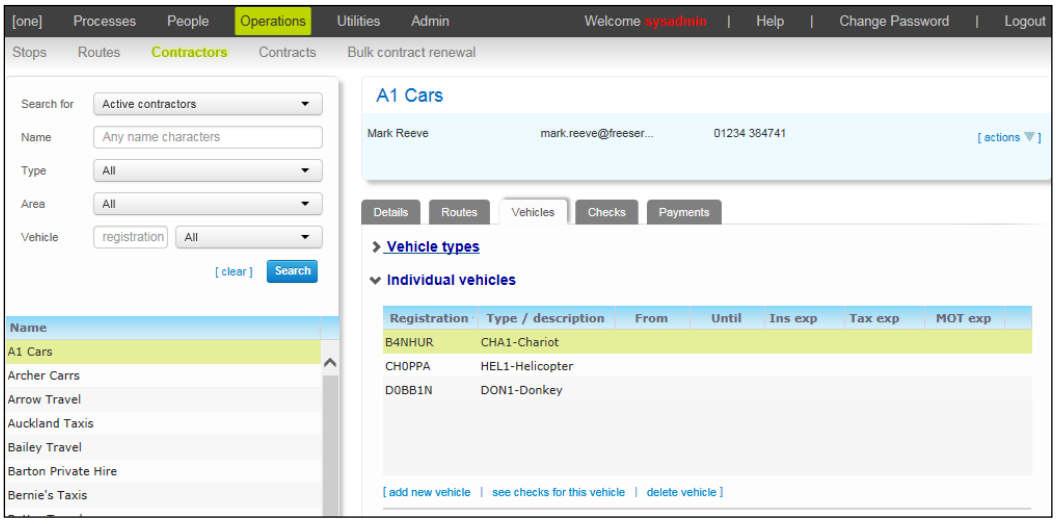


3. Enter **registration** details for the vehicle.
4. Enter a check date range into the **between** and **and** fields
5. Click the **Search** button to return a list of vehicles with checks that match your search criteria.
6. Select a vehicle to view the checks that are associated with that vehicle.

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.

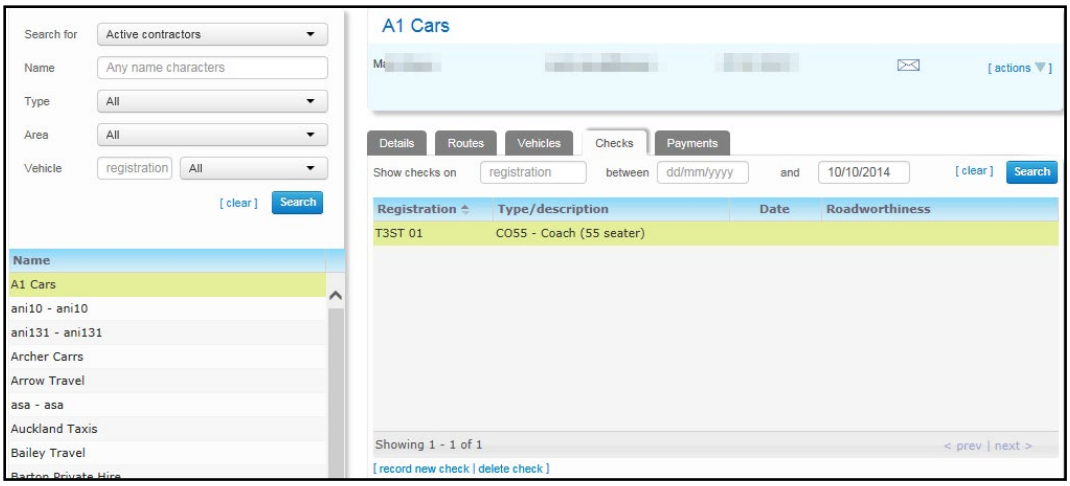
1. Select a contractor. For more information on selecting contractors, see Selecting a Contractor on page *105*.
2. Select the **Vehicles** tab and then open the **Individual vehicles** section to display a list of the individual vehicles operated by the contractor.



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 Selecting a Contractor on page *105*.
2. Select the **Checks** tab. A list of that contractor's previous vehicle checks is displayed.



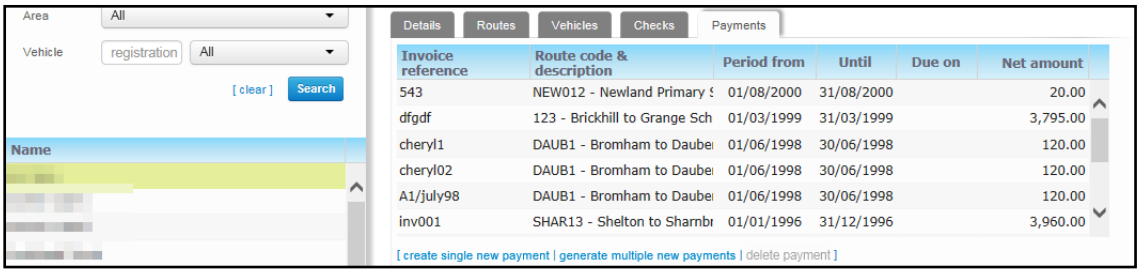
3. Highlight a check and then click the **delete check** hyperlink. A confirmation dialog is displayed.
4. Click the **Yes** button to delete the check.

Managing Contractor Payments

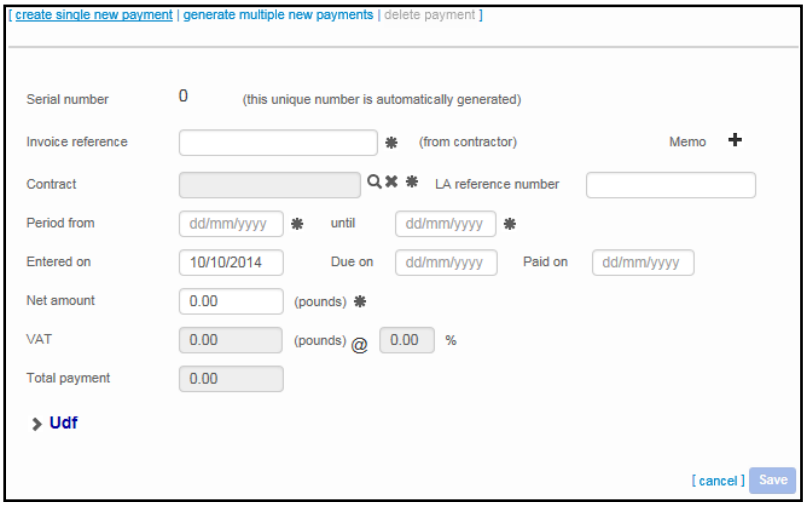
The **Operations | Contractors | Payments** tab enables you to generate payments to contractors either individually or in bulk.

Creating Individual Contractor Payments

1. Select a contractor. For more information on selecting contractors, see Selecting a Contractor on page *105*.
2. Select the **Payments** tab. A list of the selected contractor's previous payments is displayed.

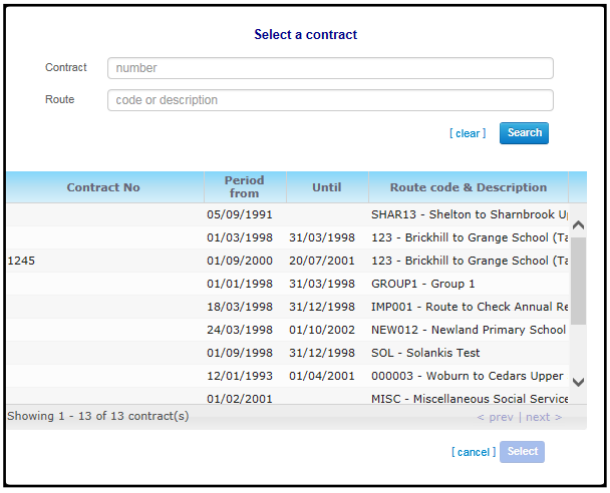


3. Click the **Create Single New Payment** hyperlink. Editable fields related to payment details are displayed.



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.



   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.

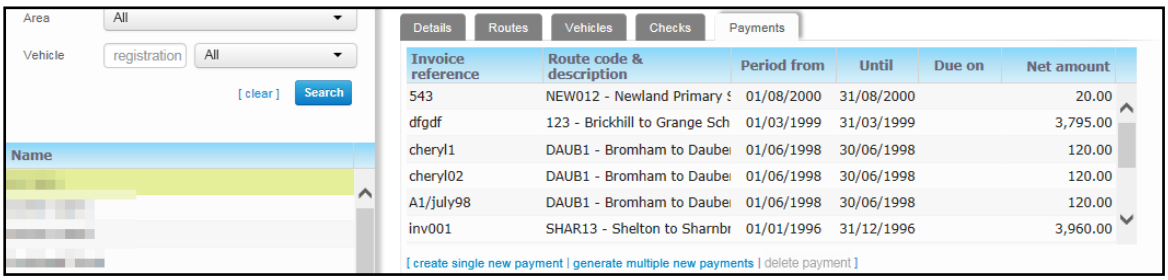
> ***NOTE:*** *The VAT rate used to calculate the total payment is defined by the contract the payment is made against. For information on changing a contract's VAT rate, see* *Setting Contract Costs on page 119.*

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

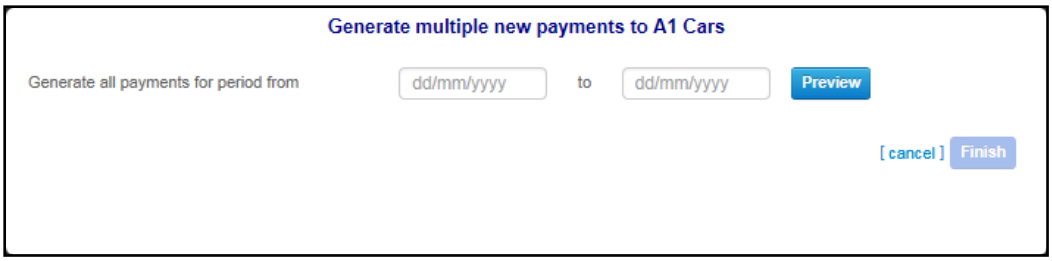
> ***NOTE:*** *You can also add a new payment from the* ***Operations | Contracts | Payments*** *tab. To do so, click the* ***add new payment for this contract*** *hyperlink. The* ***create new single payment*** *menu appears with the selected contract pre-populated in the* ***Contract*** *field.*

Generating Multiple Contractor Payments

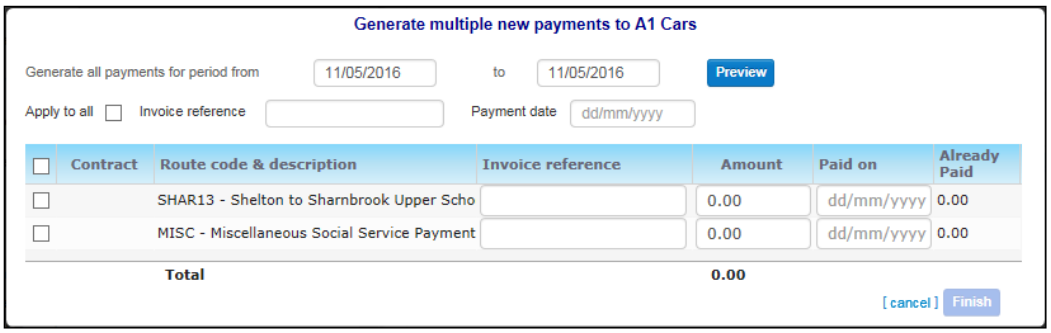
1. Select a contractor. For more information on selecting contractors, see Selecting a Contractor on page *105*.
2. Select the **Payments** tab. A list of the selected contractor's previous payments is displayed.



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



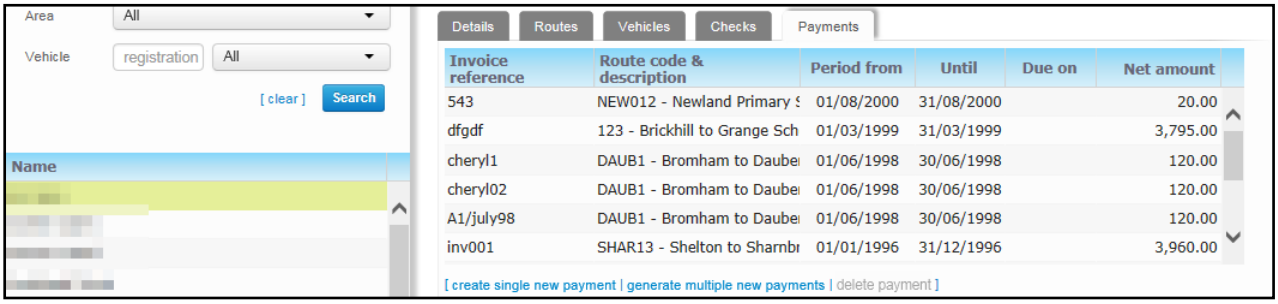
4. Enter dates into the **Generate all payments for period from** and **to** fields and then click the **Preview** button. A list of all contracts and routes requiring payment for the specified time period is displayed. The **Already Paid** column shows the amount already paid for each contract within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



5. If required, use the **Apply to all** flag to apply an invoice reference and payment date to all contracts in the list:
   a. Select the **Apply to all** check box.
   b. Enter an **Invoice reference**.
   c. Enter a **Payment date**.
6. Use the check boxes to select the contracts you want to make payments for. If you entered an **Invoice reference** and **Payment date** in step 5, then these details are populated for the selected contracts.
7. For each selected contract, enter a payment about into the **Amount** field. The **Total** field displays a running total of all payments for the selected contracts.
8. If you did not enter an **Invoice reference** and **Payment** date in step 5, then enter these details into the **Invoice reference** and **Paid on** fields for each individual contract.
9. Click the **Finish** button to make the payments and close the dialog.

Deleting Contractor Payments

1. Select a contractor. For more information on selecting contractors, see Selecting a Contractor on page *105*.
2. Select the **Payments** tab. A list of the selected contractor's previous payments is displayed.



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.

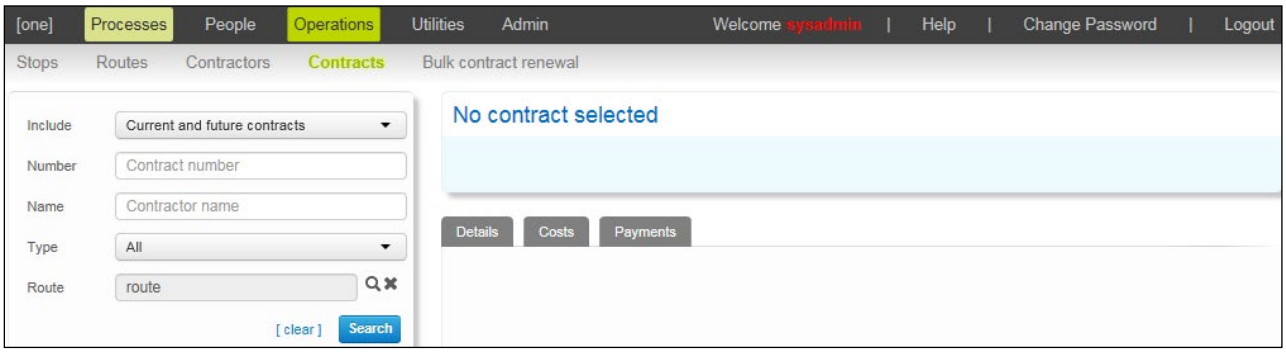
> ***NOTE:*** *You cannot delete payments with a recorded* ***Paid On*** *date.*

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.



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.

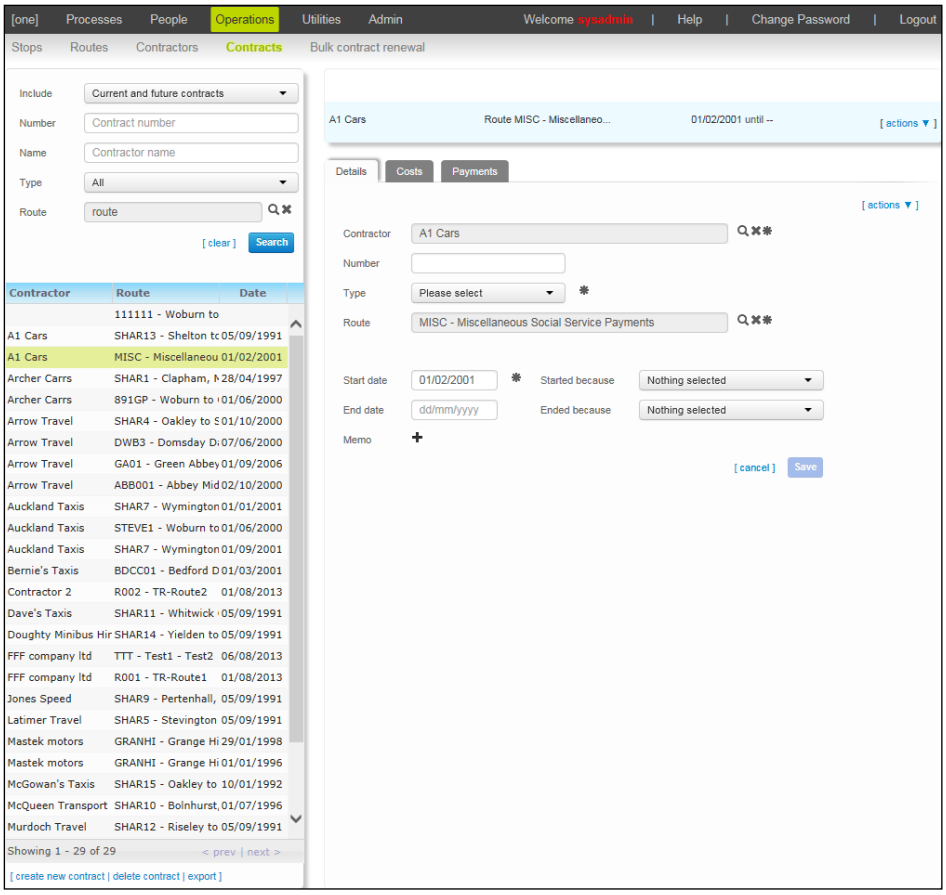
> ***NOTE:*** *To export the returned search results into a spreadsheet file, click the* ***export*** *hyperlink at the bottom of the list.*

4. Highlight the contract you want to view.

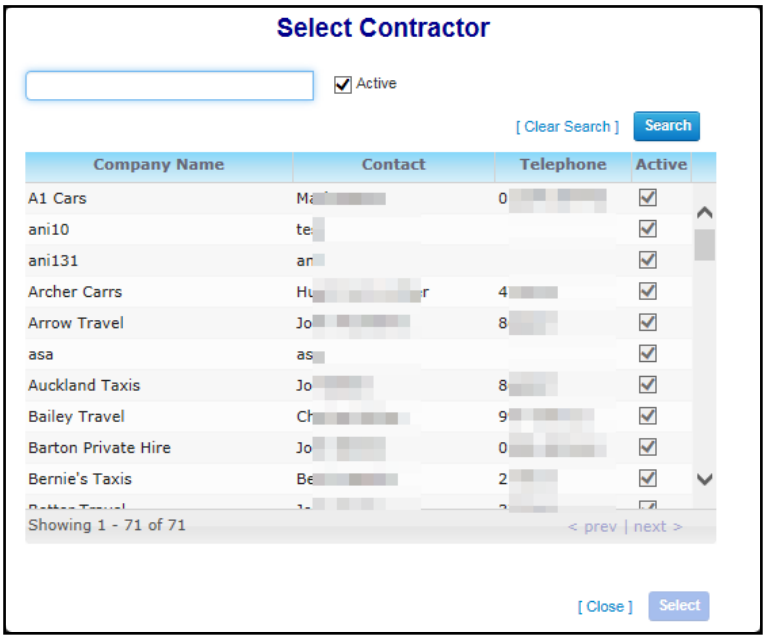
> ***NOTE:*** *All search fields are optional. Clicking the* ***Search*** *button without entering any search criteria returns a list of all the contracts in One.*
>
> *One Transport displays the number of results matching the entered search criteria at the bottom of the search panel. However, Access 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 [One Publications] 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.



3. Select a **Contractor**:
   a. Click the **Contractor** browse to display the **Select Contractor** dialog.

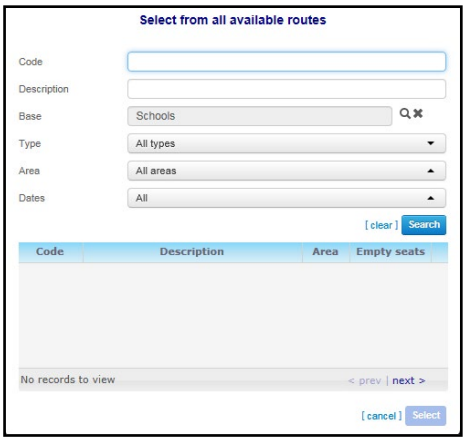


b. If required, enter the name of the contractor into the **Search with company name** field and then click the **Search** button. A list of matching contractors is displayed.

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.



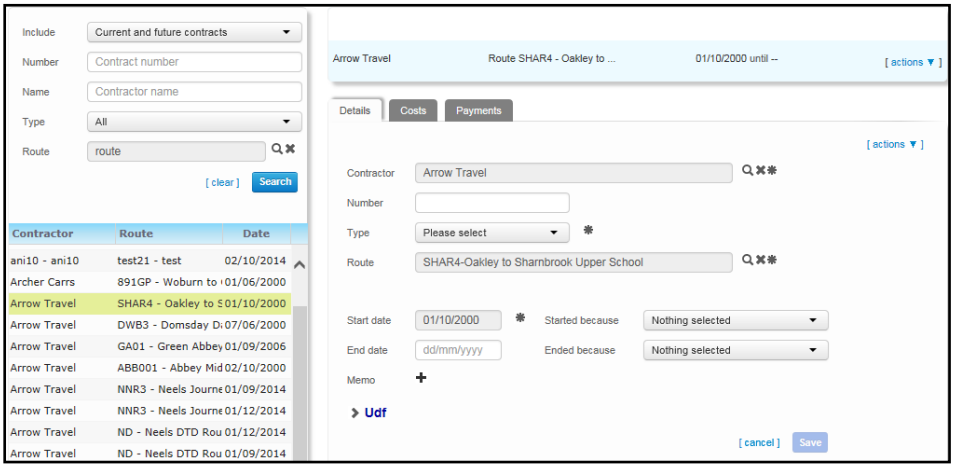
b. Enter search criteria and then click the **Search** button to display a list of matching routes.

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 Selecting a Contract on page *116*.
2. Ensure that the **Details** tab is selected. Editable fields related to contract details are displayed.



3. Make the required changes.

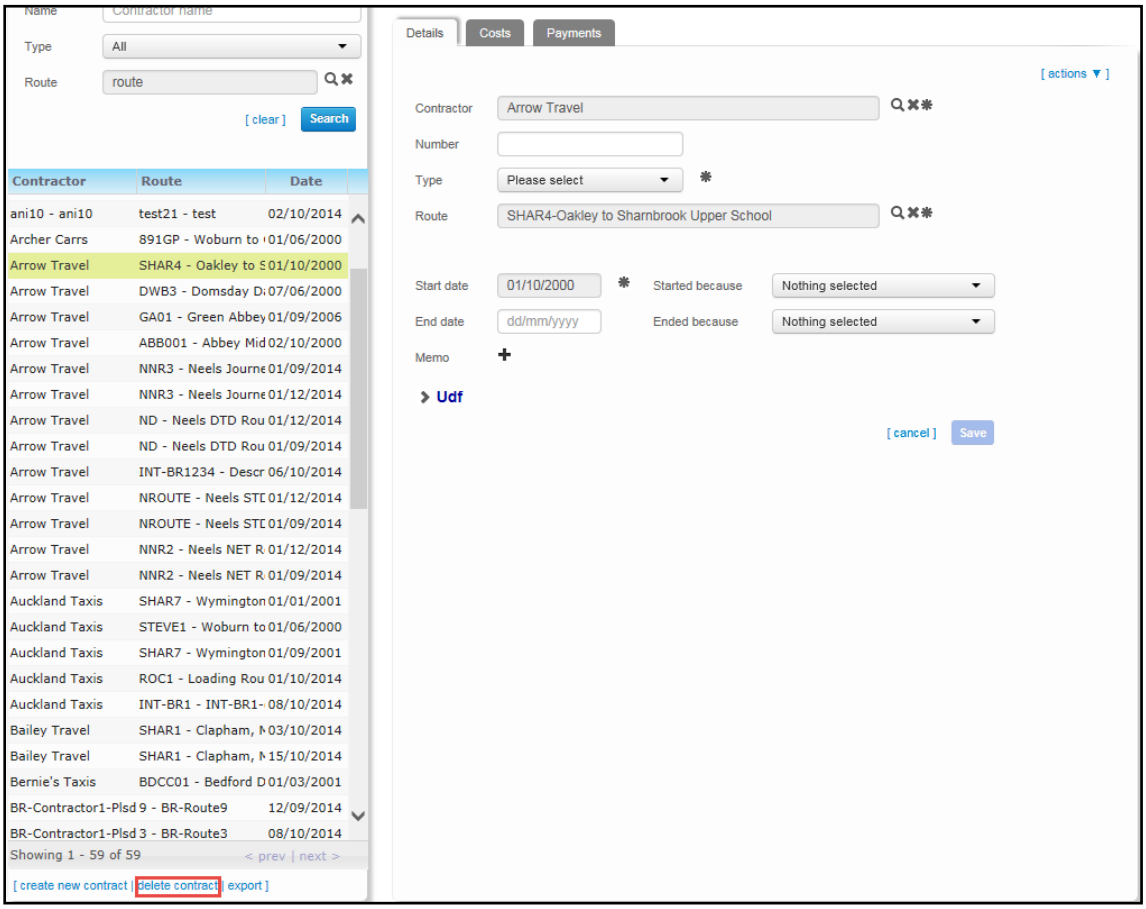
4. Click the **Save** button to save your changes.

> ***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.

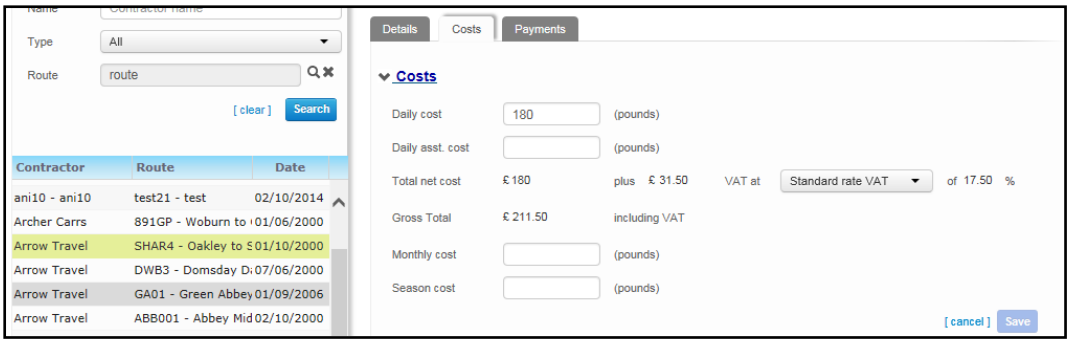
1. Select a contract. For more information on selecting contracts, see Selecting a Contract on page *116*.



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 Selecting a Contract on page *116*.
2. Select the **Costs** tab and open the **Costs** section**.** Editable fields relating to contract costs are displayed.



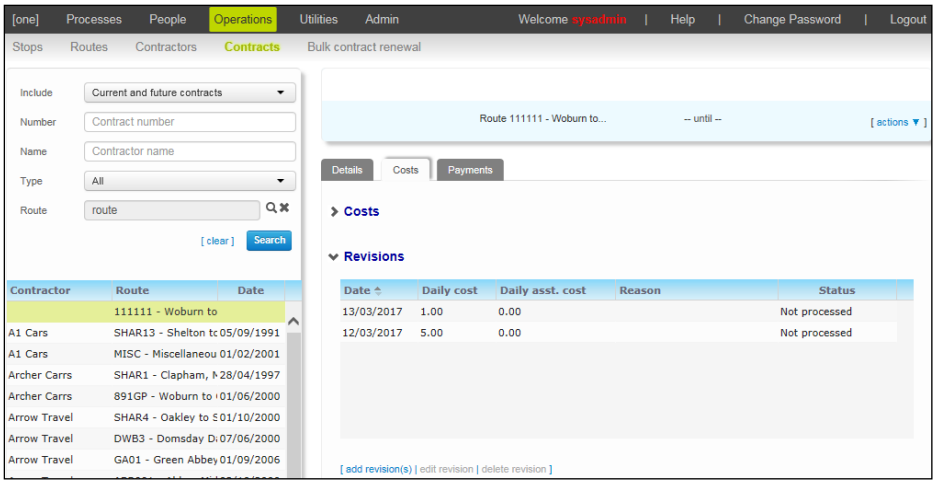
3. Enter the required cost details. The available fields are:
   - **Daily cost**
   - **Daily asst. (assistant) cost (pounds)**
   - **VAT At**: Enables you to select the VAT rate that applies to the contract. Select from **Not VATable**, **Zero Rated** and **Standard Rate VAT**. The non-editable **Including VAT** field updates accordingly.
   - **Monthly cost**
   - **Season cost**
4. Click the **Save** button to save your changes.

Recording Contract Revisions

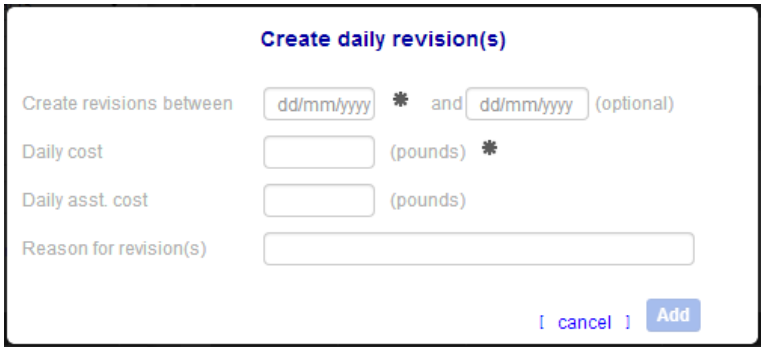
The **Revisions** section of the **Operations | Contracts | Costs** tab enables you to record rate revisions against a contract. You can use revisions to alter the amount of money paid against a contract for a specific time period, with the contract reverting back to its original rates once the revision period is over.

Adding a Contract Revision

1. Select a contract. For more information on selecting contracts, see Selecting a Contract 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.



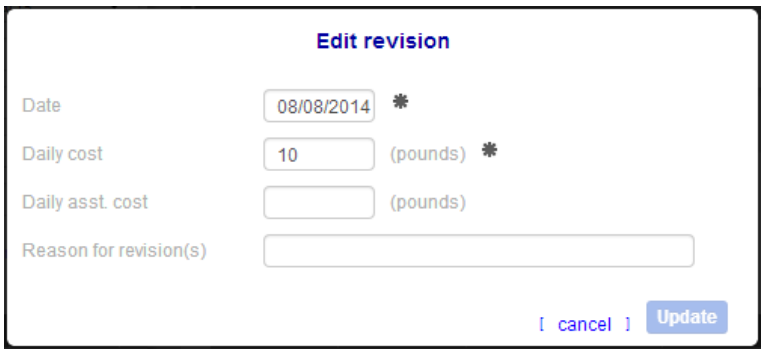
3. Click the **add revision(s)** hyperlink to display the **Create daily revision(s)** dialog.



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

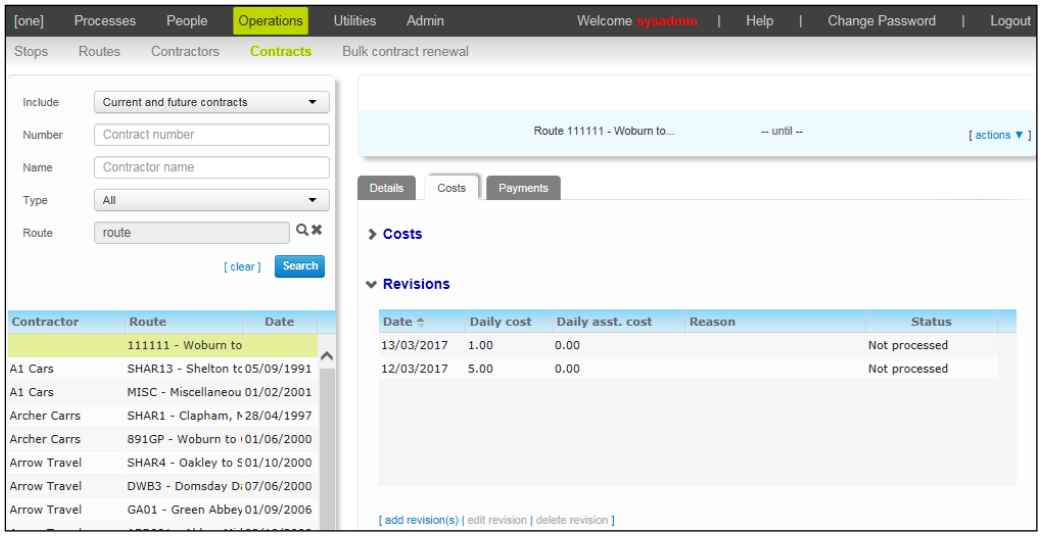
1. Select a contract. For more information on selecting contracts, see Selecting a Contract on page *116.*
2. Select the **Costs** tab and open the **Revisions** section**.** A list of the contract's past and current revisions is displayed.
3. Highlight the revision that you want to edit and then click the **edit revision** hyperlink to display the **Edit revision** dialog.



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 Selecting a Contract 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.

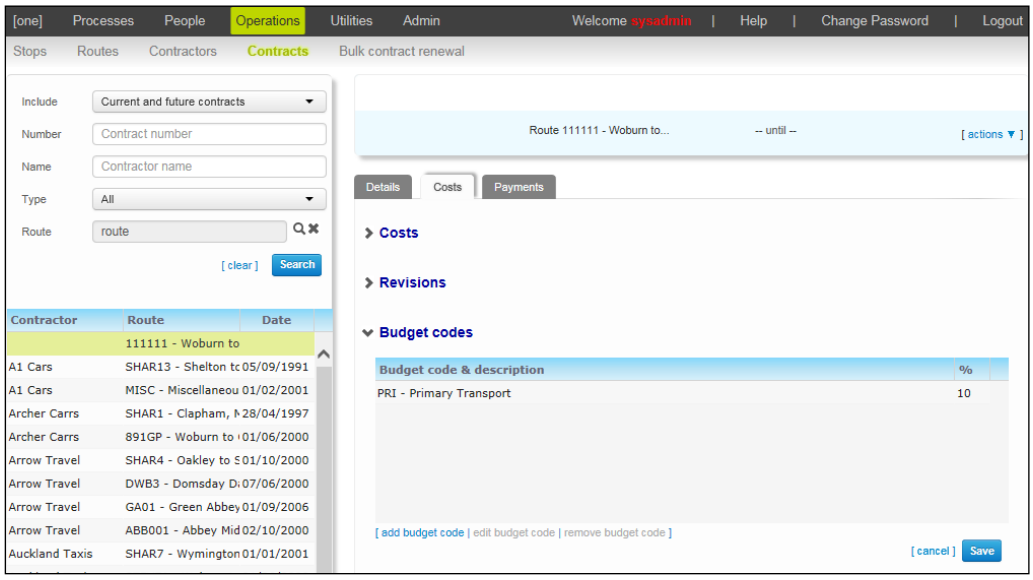


4. Click the **Delete** button to delete the revision and close the dialog.

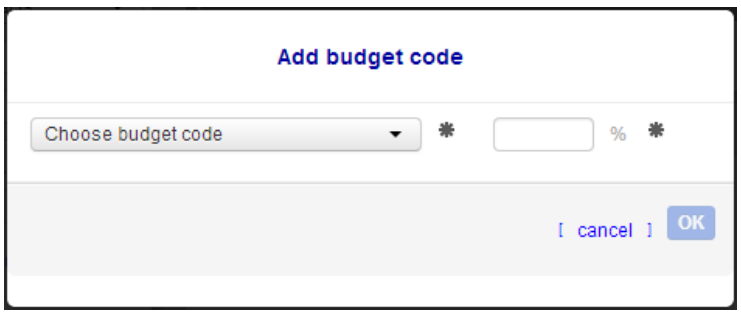
Managing Contract Budget Codes

Adding a Budget Code to a Contract

1. Select a contract. For more information on selecting contracts, see Selecting a Contract 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. Click the **add budget code** hyperlink to display the **Add budget code** dialog.



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 Configuring Budget Codes 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.

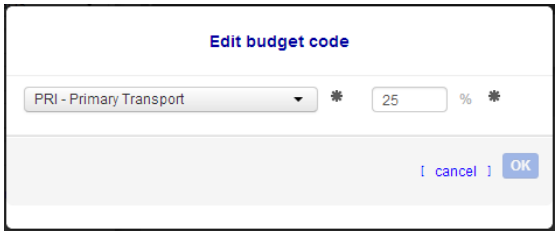
Editing Contract Budget Codes

> ***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 One Publications website.*

1. Select a contract. For more information on selecting contracts, see Selecting a Contract 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.

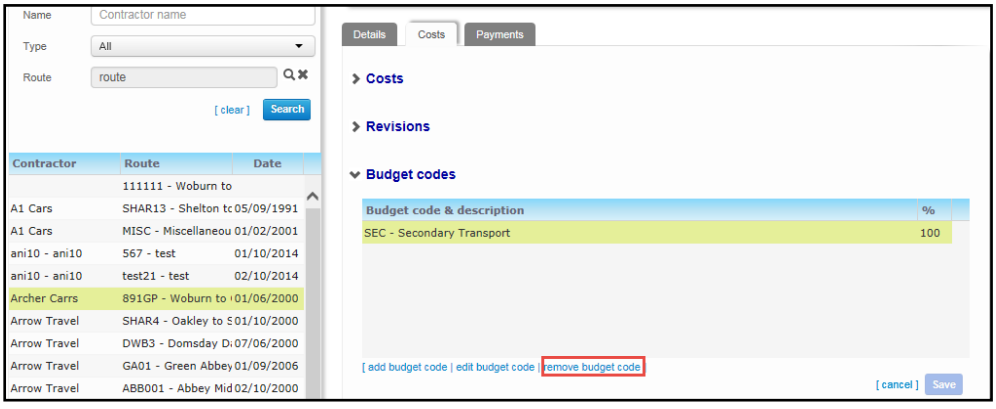
5. Click the **OK** button to save your changes and close the dialog.

Removing Contract Budget Codes

1. Select a contract. For more information on selecting contracts, see Selecting a Contract 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.

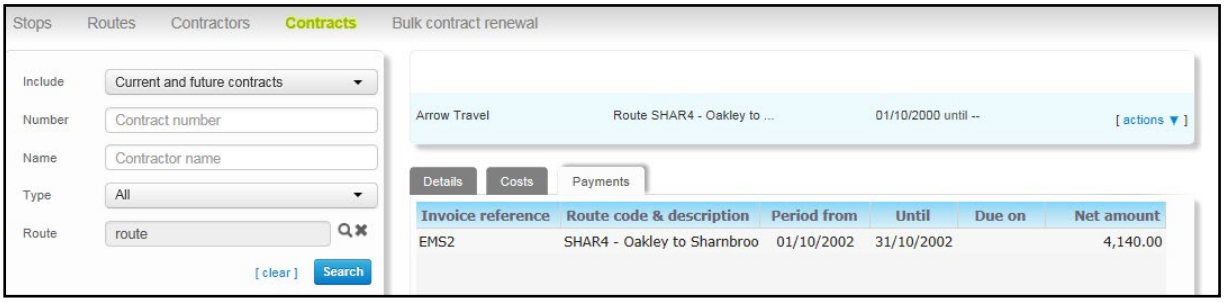
3. Highlight the budget code you want to delete and then click the **remove budget code** hyperlink. A confirmation dialog displays.



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 Selecting a Contract on page *116*.
2. Select the **Payments** tab. A list of all payments made against the selected contract is displayed.

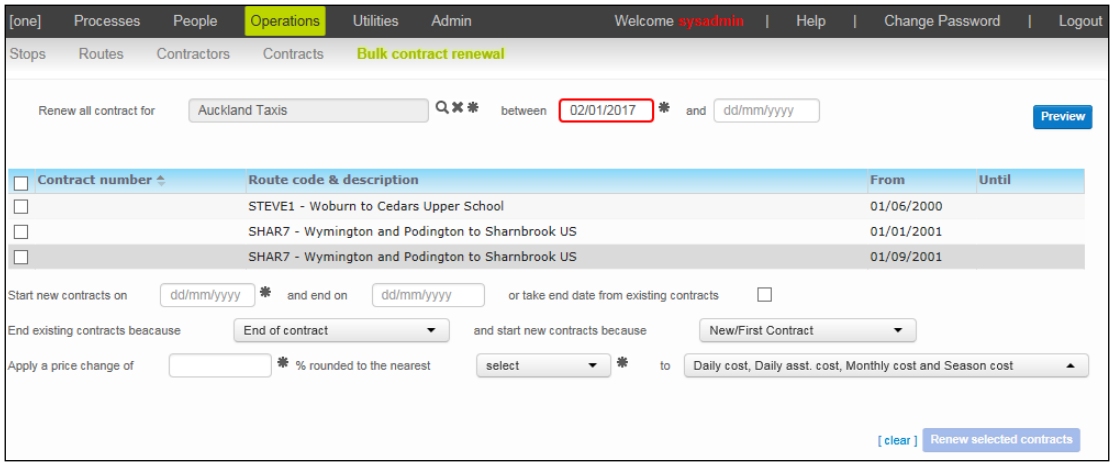


***NOTE:** To add a new contract payment, click the **add new payment for this contract** hyperlink. The **Operations | Contractors | Payments** screen is displayed, with the selected contract pre-populated in the **Contract** field. For more information on generating contract payments, see Managing Contractor Payments 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.

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.

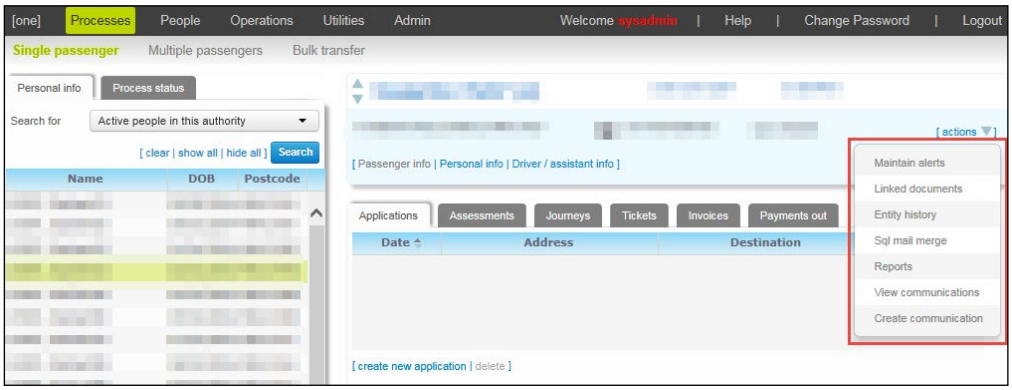


3. Select the check boxes next to the contracts you want to renew. Alternatively, select the topmost check box to select all contracts in the list.

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 pop-up 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**.



The Actions menu

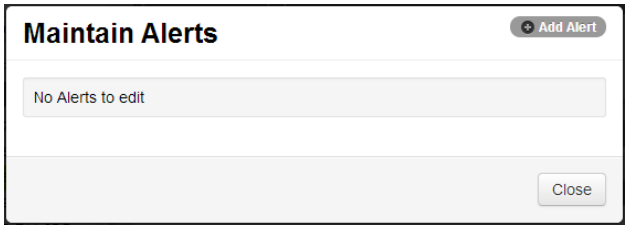
Managing Alerts

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 One Publications website.

Creating an Alert

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

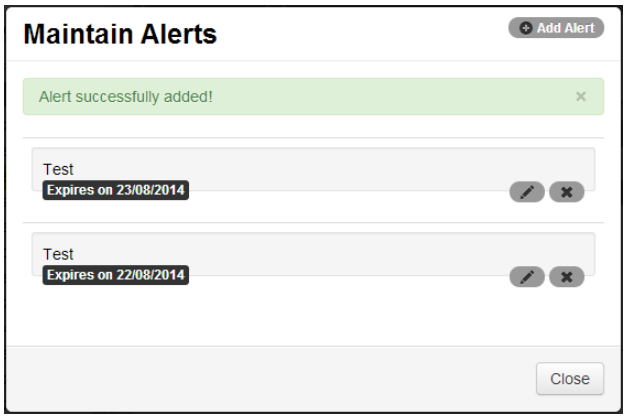


2. Click the **Add Alert** button to display the **Add** dialog.

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.

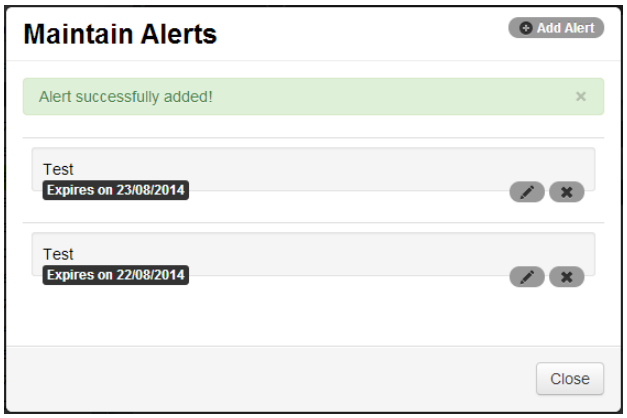


2. Click the **Edit** button for the alert you want to edit. The **Edit** dialog is displayed.

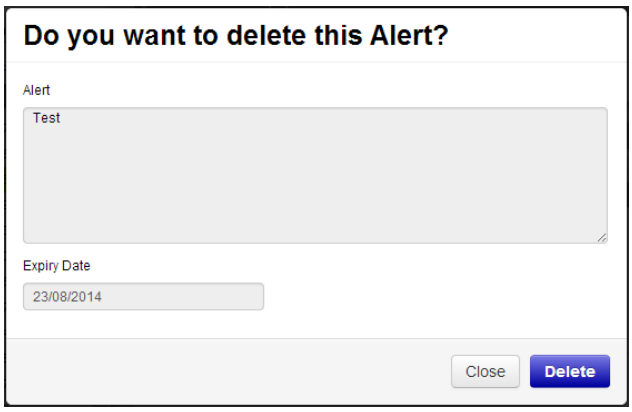
3. Make the required changes.
4. Click the **Save** button to save your changes.

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.



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

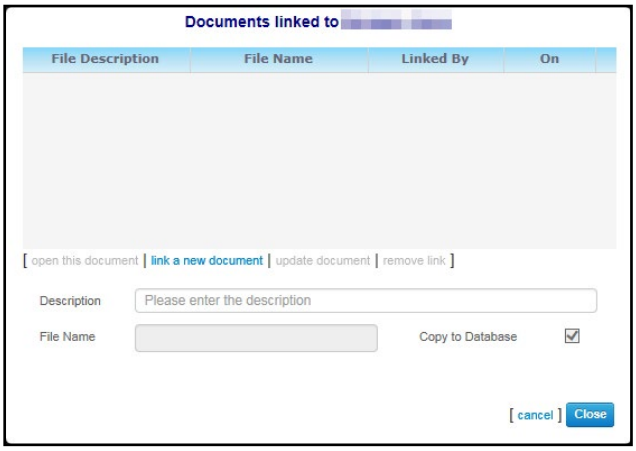
> ***NOTE:*** *SQL and trigger alerts defined in One v4 are also displayed when transport entities are selected.*

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

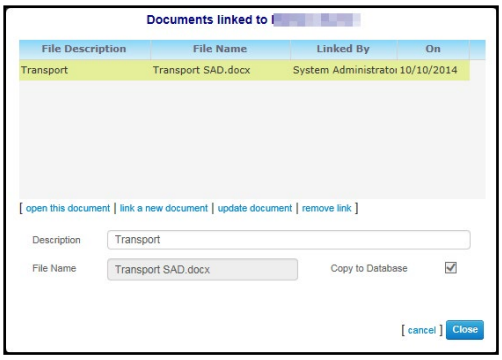
1. Open the **actions** menu and select the **Linked documents** menu option to display the **Documents linked to** dialog.



2. Click the **link a new document** hyperlink to display the **Open** dialog.
3. Select the document that you want to add and then click the **Open** button.
4. Enter a **Description** for the document.
5. Click the **Save** button to upload and link the document to the person's record.

Updating a Linked Document

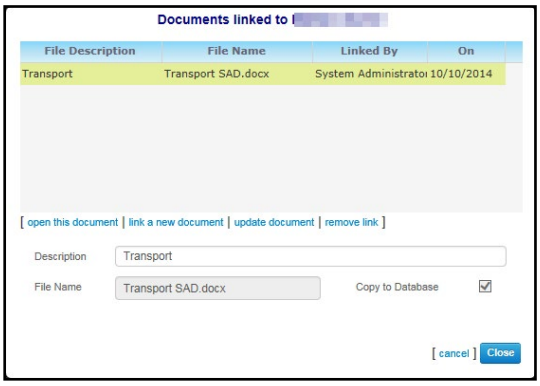
1. Open the **actions** menu and select the **Linked documents** menu option to display the **Documents linked to** dialog.
2. Highlight the document you want to update.



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

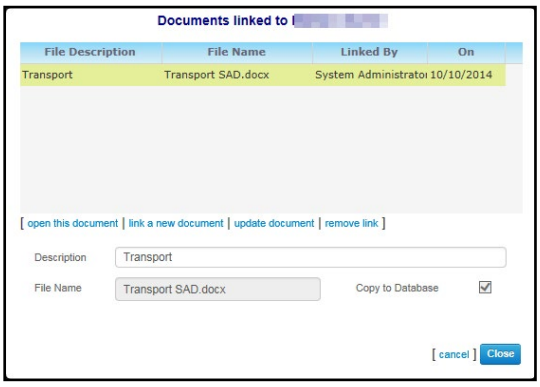
1. Open the **actions** menu and select the **Linked documents** menu option to display the **Documents linked to** dialog.
2. Highlight the document you want to open.



3. Click the **open this document** hyperlink to download a copy of the document.

Deleting a Linked Document

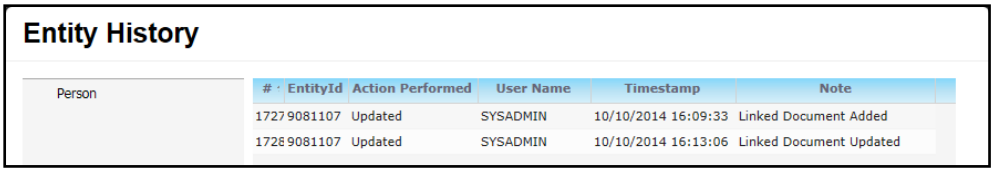
1. Open the **actions** menu and select the **Linked documents** menu option to display the **Documents linked to** dialog.
2. Highlight the document you want to delete.



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.



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 One Publications 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 Appendix A.

For information on configuring linked reports see the v4 Linked Reports Handbook, available from the One Publications 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.

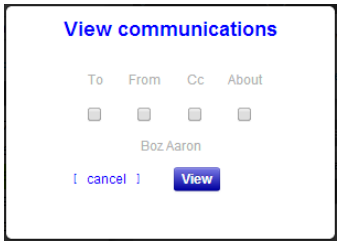
3. Click the **Run report** button to run the report.

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 Selecting a Person on page *49*.
2. Open the **actions** menu and select the **View communications** menu option to display the **View communications** dialog.



3. Use the check boxes to select the type of communication you want to view. You can view communications that are **To**, **From, Cc** or **About** the selected person.
4. Click the **View** button to display the **People | Communications & complaints** page, showing a list of communications that match your search criteria. For more information on working with communications in **People | Communications & complaints** see Managing Communications on page *76*.

Creating a Communication via the Actions Menu

1. Select a person. For more information on selecting a person, see Selecting a Person 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 Recording a Communication *on page 78*.

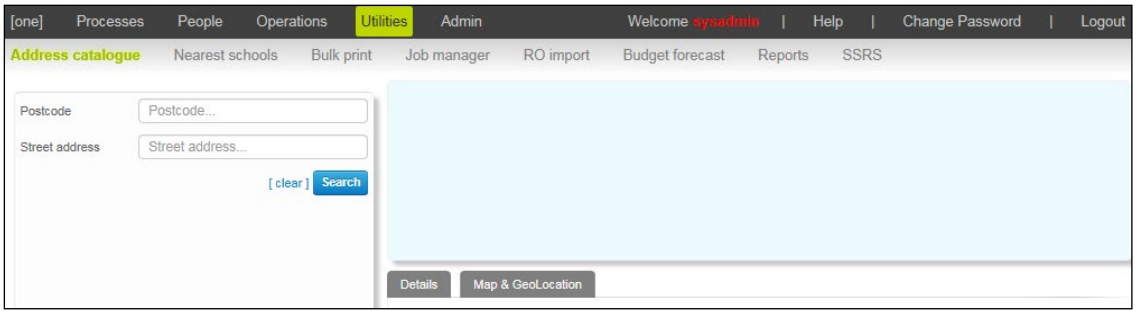
08 | Utilities

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.

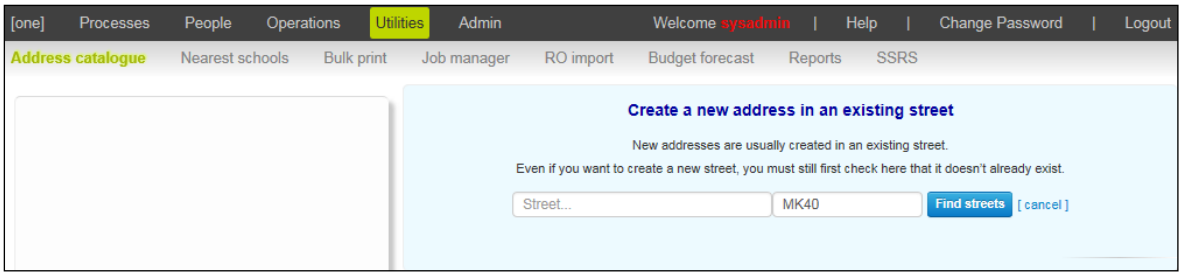
Adding an Address to the Address Catalogue

The Address Catalogue enables you to create and update addresses from within the Transport module. Addresses created within One Transport are accessible throughout One.

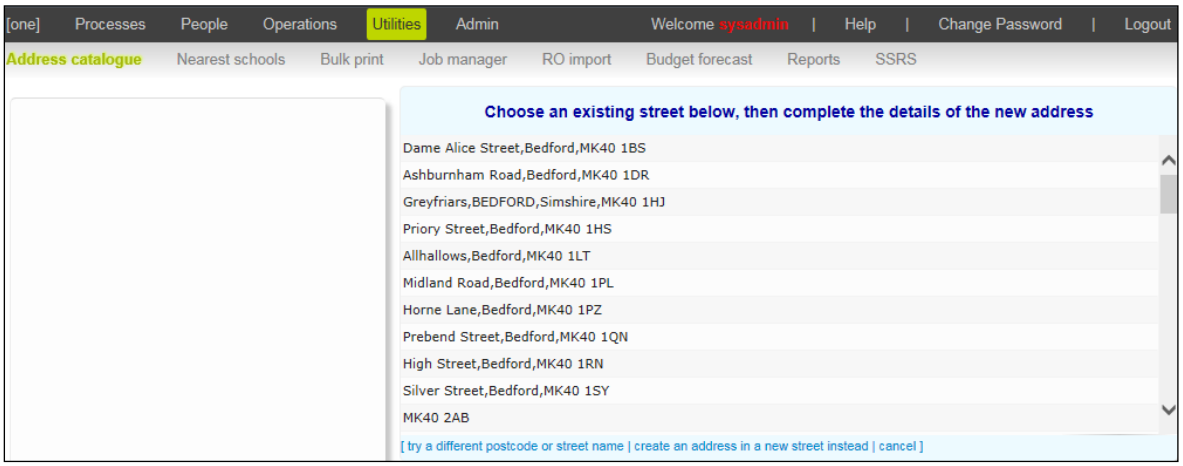
1. Select the **Utilities** area and select the **Address catalogue** tab.



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.

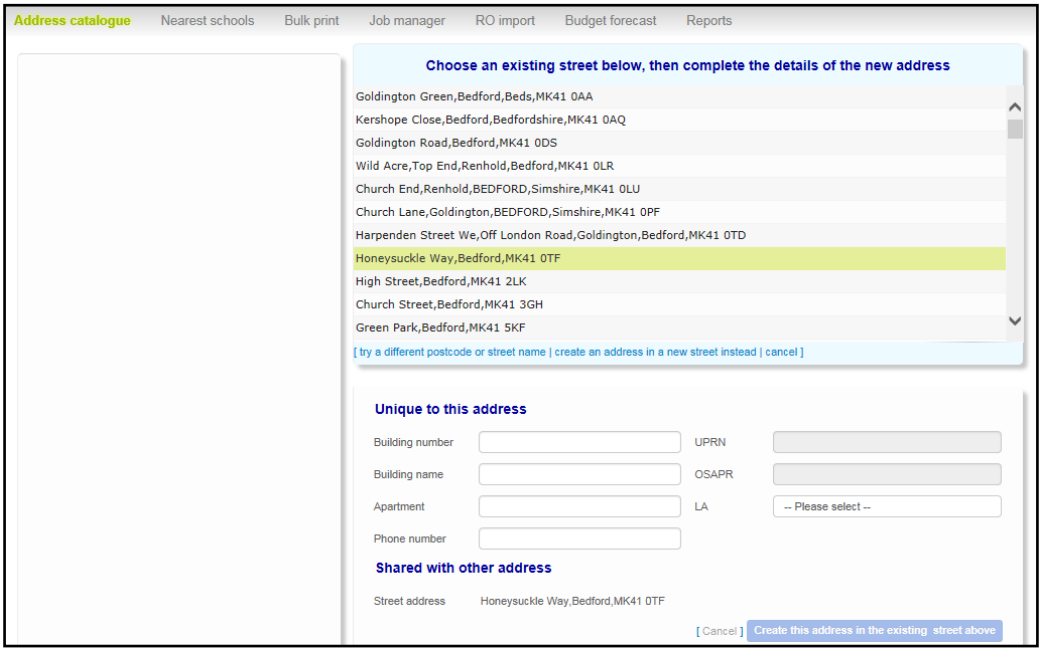


4. Enter the **Street address** and **Postcode** of the address you want to create and then click the **Find Streets** button. A list of existing streets that match your criteria is displayed.



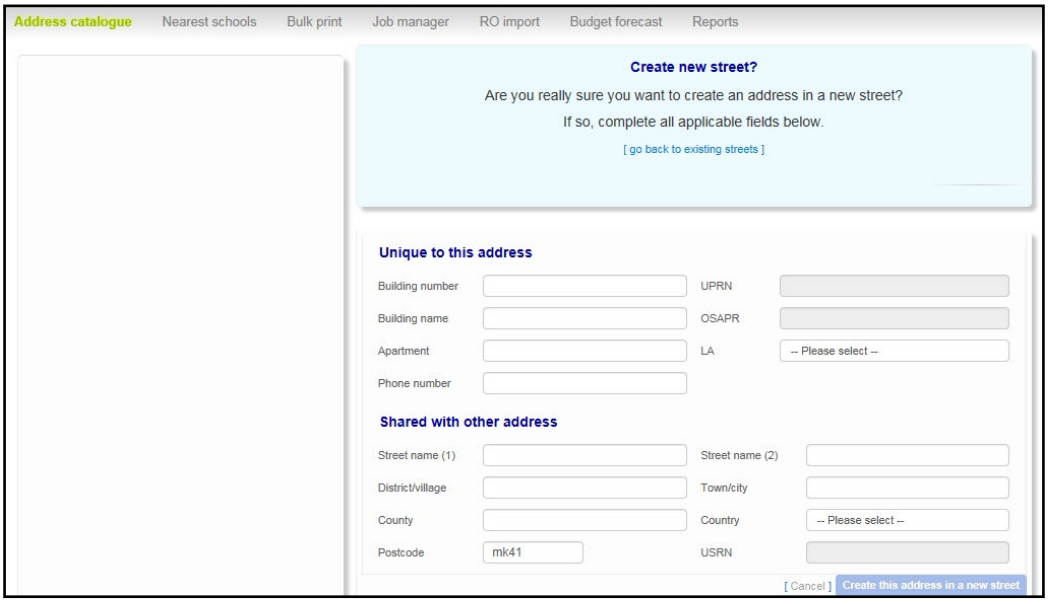
You must use the **Find Streets** function even if you intend to create a new street.

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.



   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.



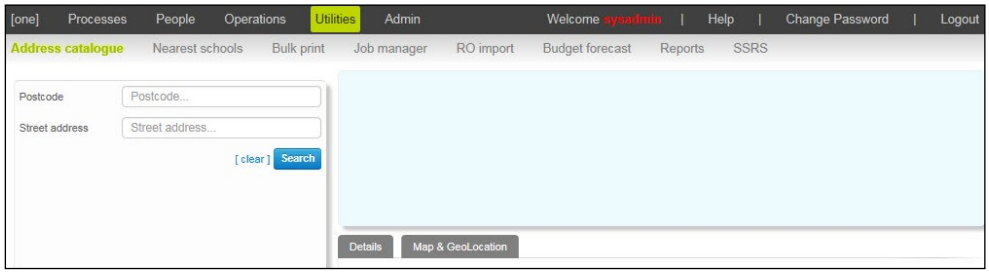
   b. Enter a **Building number**, **Building name** or **Apartment** for the address.
   c. Enter **Phone number** and **LA** details as required.
   d. Enter a **Street name** for the new street.

e. Enter **District/ village**, **Town/ city**, **County**, **Country** and **Postcode** information for the new street as required.

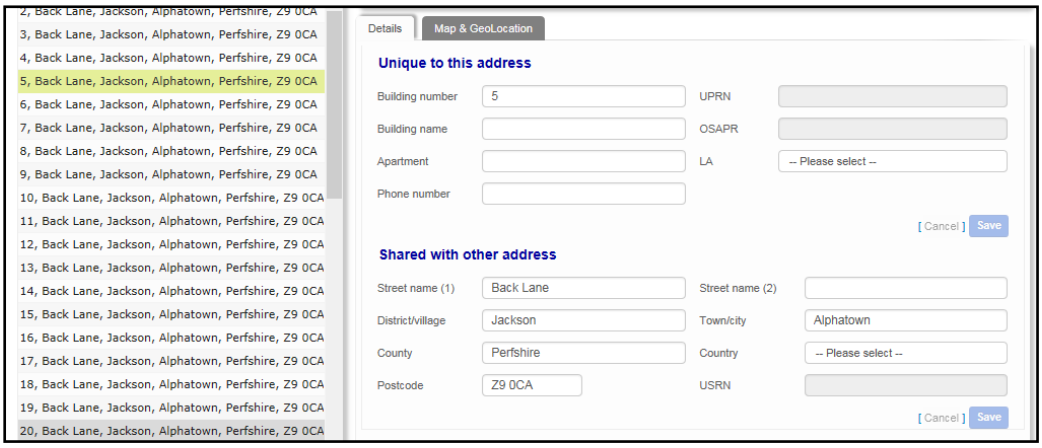
f. Click the **Create this address in a new street** button to create the address.

Editing an Address

1. Select the **Utilities** area and select the **Address catalogue** tab.



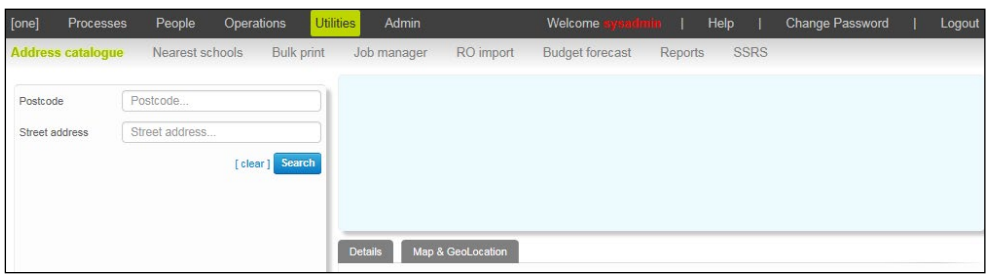
2. Enter a **Postcode** or **Street address** details and then click the **Search** button to display a list of matching addresses.
3. Highlight the address you want to edit.



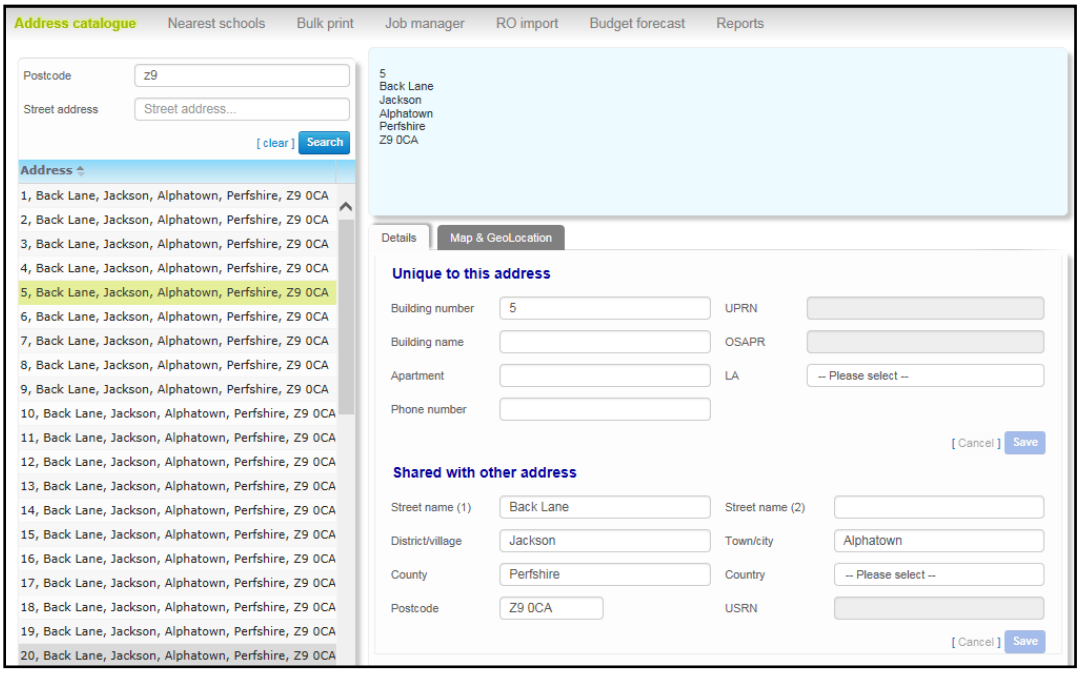
4. Ensure that the **Details** tab is selected. Editable fields related to address details are displayed.
5. Make the desired changes. The **Details** tab comprises two sections:
   - **Unique to This Address**: Details which are only relevant to the address in question, such as house name or number.
   - **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.



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.



4. Select the **Map & GeoLocation** tab to view the address on a map.

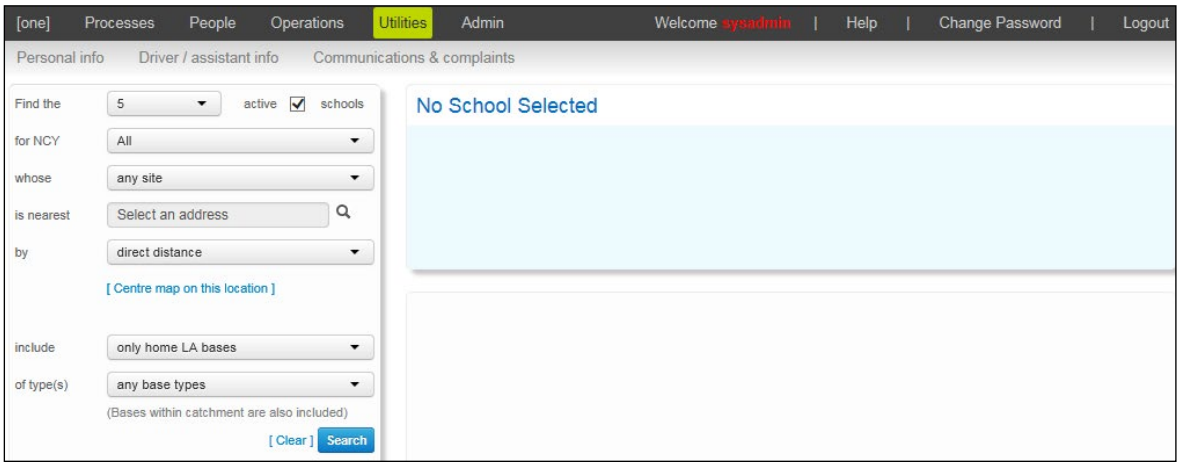
> ***NOTE:*** *You can also set or change an address's easting and northing geocodes from the* ***Map & GeoLocation*** *tab. To do so, enter values into the* ***Easting*** *and* ***Northing*** *fields and then click the* ***Save*** *button.*

Searching for Nearest Schools by Location

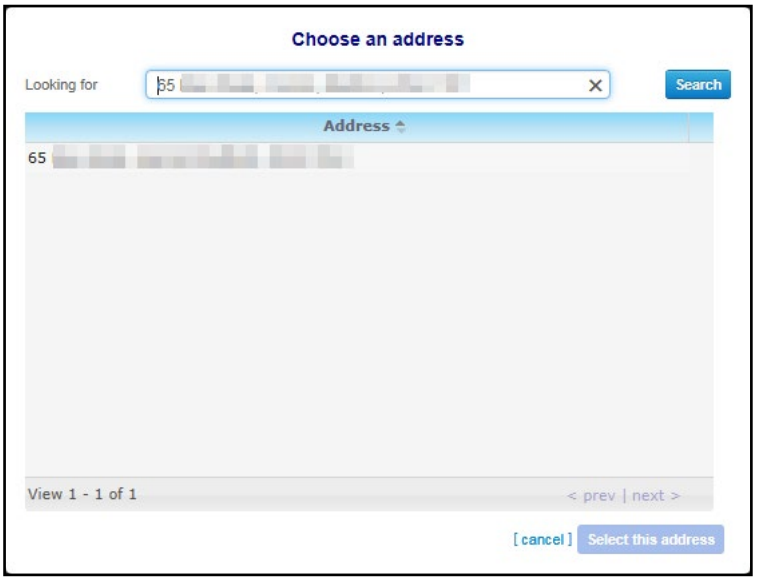
The **Utilities | Nearest schools** page enables you to view the schools that are nearest to a particular address. Distances are calculated using GIS.

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.



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.



   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**.

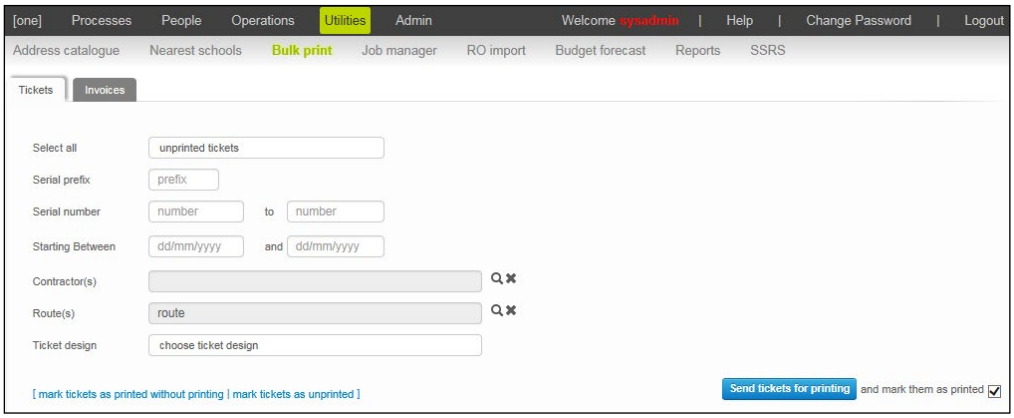
> ***NOTE:*** *If you search for the nearest school by driving distance and One cannot calculate a driving distance, then One does not display walking or direct distances either. This is because the lack of a driving distance means that One cannot select the site or gate to measure to. Likewise, One 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.
10. Click the **Search** button to view a list of the nearest schools to the selected address and the locations of the schools on a map.
11. Highlight a school to select it. The school's details are displayed on the toolbar and its location is highlighted on the map.

Printing Tickets in Bulk

The **Utilities | Bulk print | Tickets** page enables you to print tickets in bulk. It is also possible to print tickets at the point of issue. For more information on printing tickets at the point of issue, see Creating a Ticket on page *29* and Creating Journeys in Bulk 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.



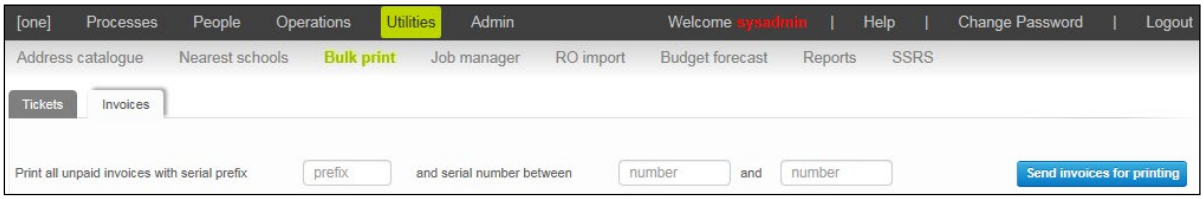
3. Select a ticket print status from the **Select all** menu.
4. Enter **Serial prefix**, **Serial number**, **Starting Between**, **Contractor(s)**, and **Route(s)** details as required.
5. Select a **Ticket design** for the printed tickets.
6. If you want to mark the tickets as printed once you print 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.



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.

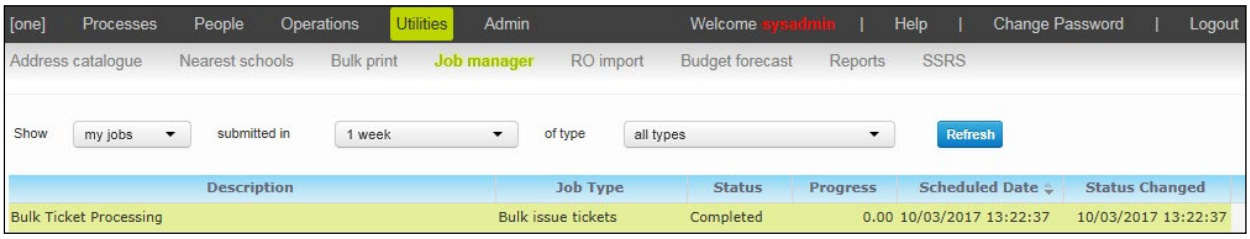
> ***NOTE:*** *The* ***Utilities | Bulk Print | Invoices*** *function can only be used to print unpaid invoices. There is no function to bulk print paid invoices.*

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.

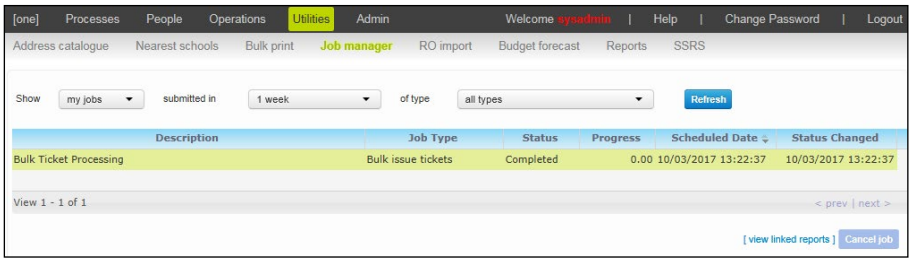


2. Select whether you want to view all jobs or just your own jobs from the **Show** menu.
3. Select a submission time limit for your job search from the **submitted in** menu. The options are: **All, 1 week, 2 weeks** or **3 weeks**.
4. Select a job type from the **of type** menu and then click the **Refresh** 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.



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.

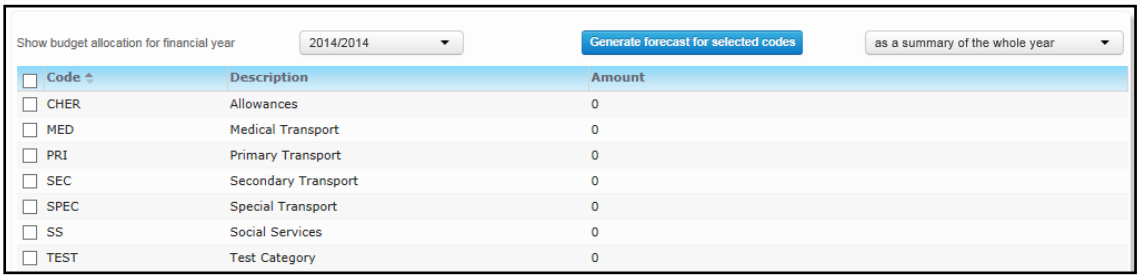
Clearing unprocessed RO transactions

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

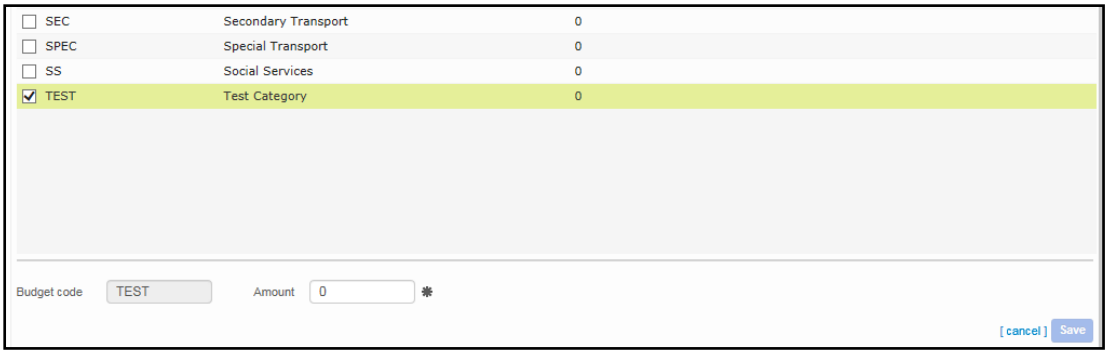
1. Select the **Utilities** area and select the **Budget forecast** page.



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* *Configuring Budget Codes on page 154.*

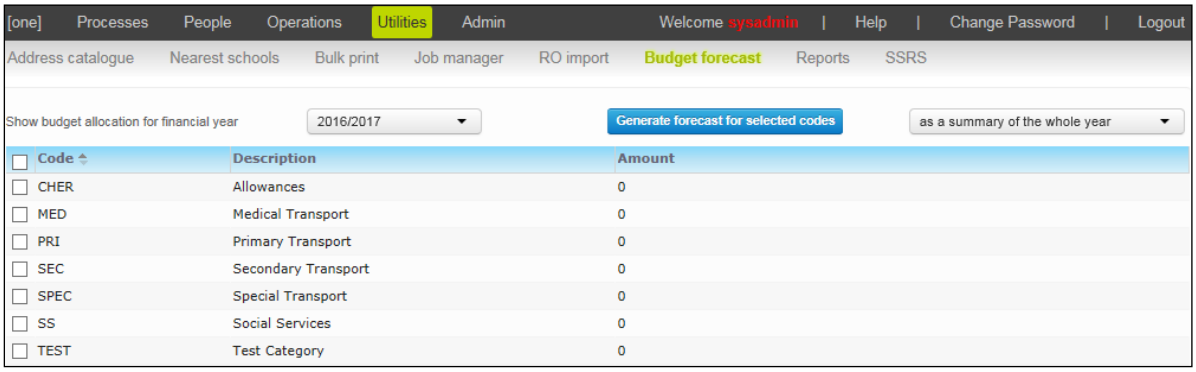
3. Highlight a budget code. The **Budget code** and **Amount** fields are displayed.



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

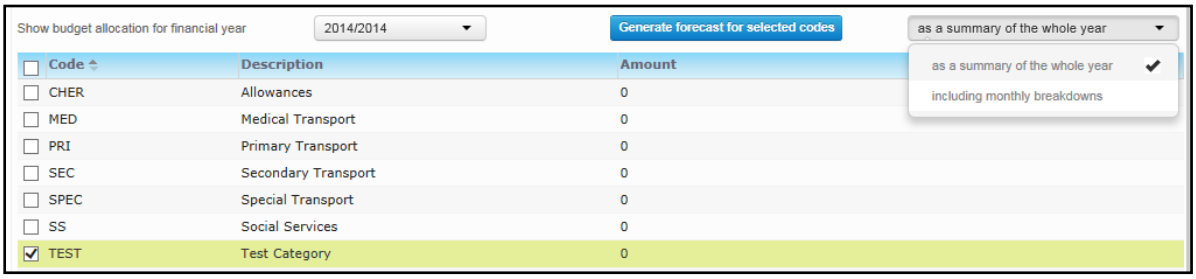
1. Select the **Utilities** area and select the **Budget forecast** page.



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* *Configuring Budget Codes on page 154.*

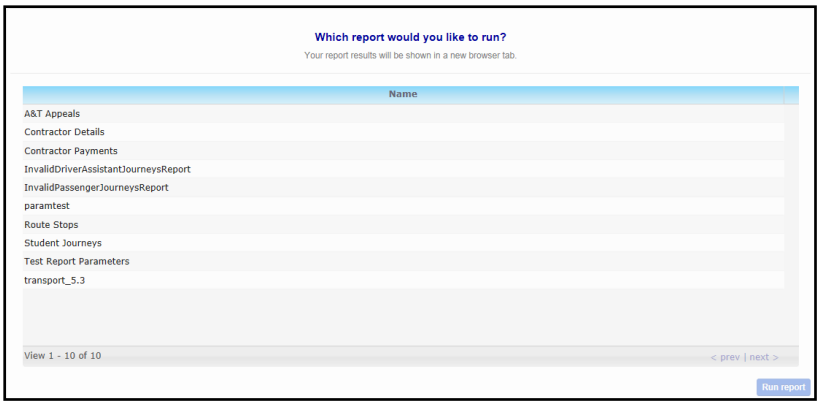
3. Highlight the budget codes you want to generate a forecast for.
4. Select whether you want to view the forecast **as a summary of the whole year** or **including monthly breakdowns** from the drop-down menu at the right of the screen.



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



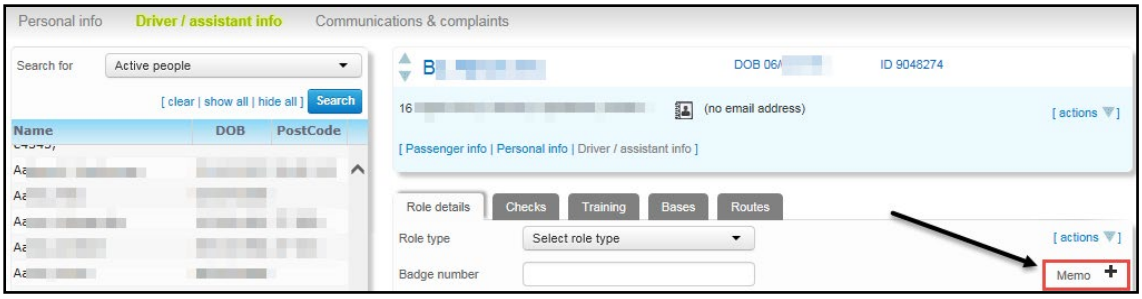
2. Highlight the report you want to run and click the **Run report** button to run the report.

> ***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 [One Publications] website.*

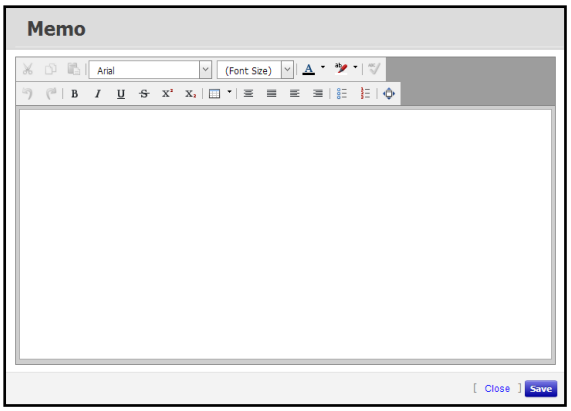
Recording Memos

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.



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



***Memo** dialog*

3. Record the memo and then click the **Save** button to close the dialog and save your changes. The **Memo** dialog uses standard word processor controls to allow for rich text formatting.

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**.

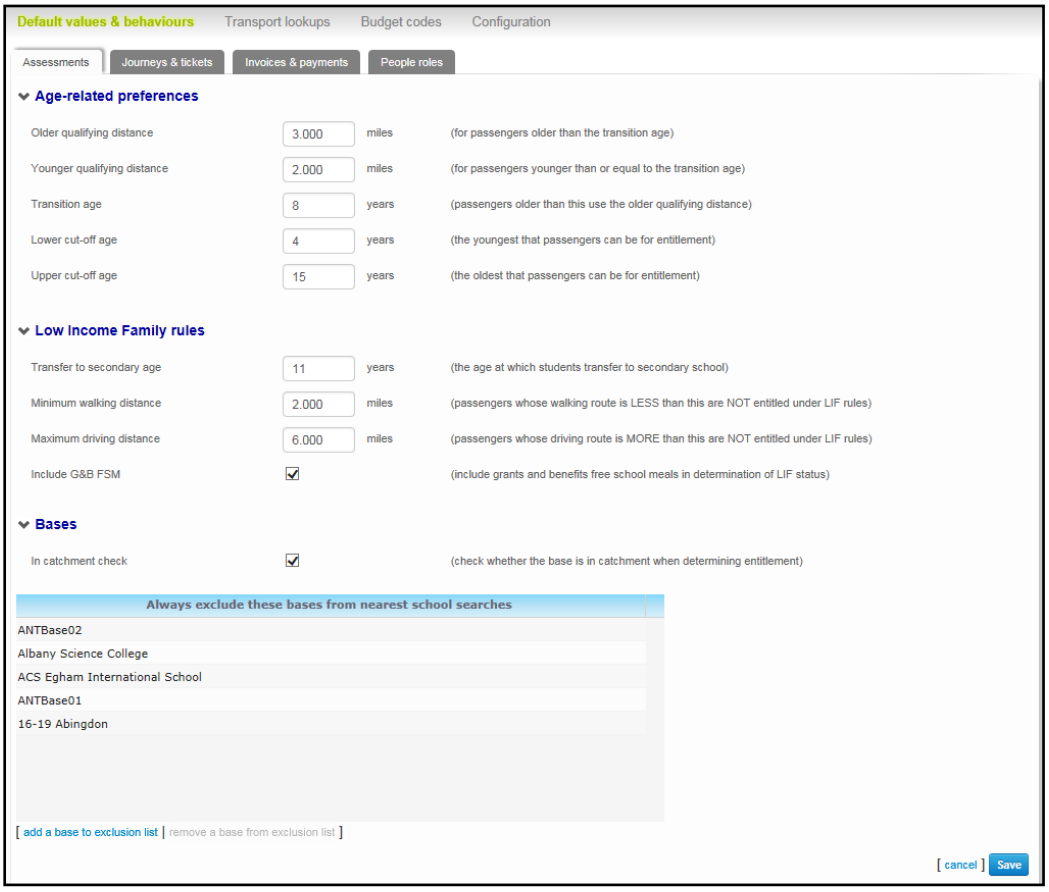
Setting Default Values and Behaviours

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.



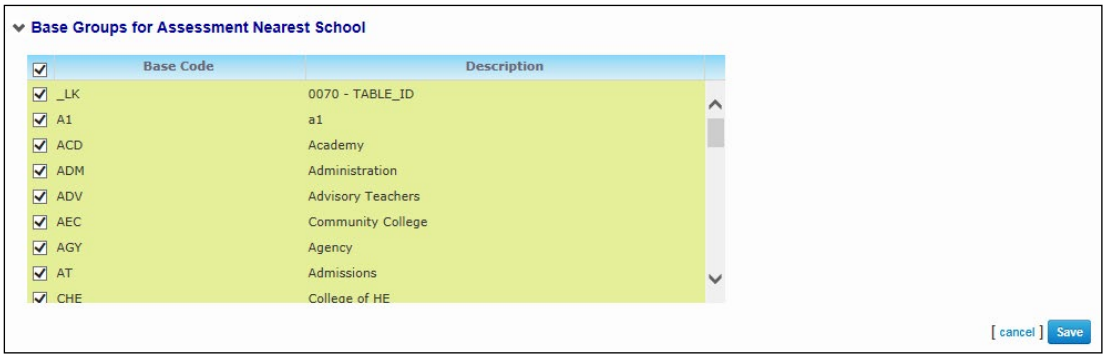
3. Make the required edits. The following fields are available:
   - **Older qualifying distance**: The journey distance at which passengers older than the transition age qualify for free transport.
   - **Younger qualifying distance:** The journey distance at which passengers younger than the transition age qualify for free transport.
   - **Transition age:** The age at which passengers switch from being assessed against the younger qualifying distance to the older qualifying distance.
   - **Lower cut-off age:** The youngest that passengers can be for entitlement.
   - **Upper cut-off age:** The oldest that passengers can be for entitlement.
   - **Transfer to secondary age:** The age at which students transfer to secondary school. Used when calculating LIF status.
   - **Minimum walking distance**: The cut-off for walking distance under LIF rules. Passengers whose walking distance is shorter than this are not eligible for LIF status.
   - **Maximum driving distance**: The cut-off for driving distance under LIF rules. Passengers whose driving distance is greater than this are not eligible for LIF status.
   - **Include G&B FSM:** Select this check box to include Grants and Benefits free school meals information when determining LIF status.
   - **In catchment check:** Select this check box to include a check on the address being in catchment when calculating entitlement.
4. Click the **Save** button to save your changes.

Editing the Nearest School Searches Exclusion List

Schools that are added to the Nearest Schools exclusion list do not show up in search results on the **Utilities | Nearest schools** page, and are excluded from entitlement calculations conducted during assessments.

Selecting Base Groups to Be Used in Nearest School Search

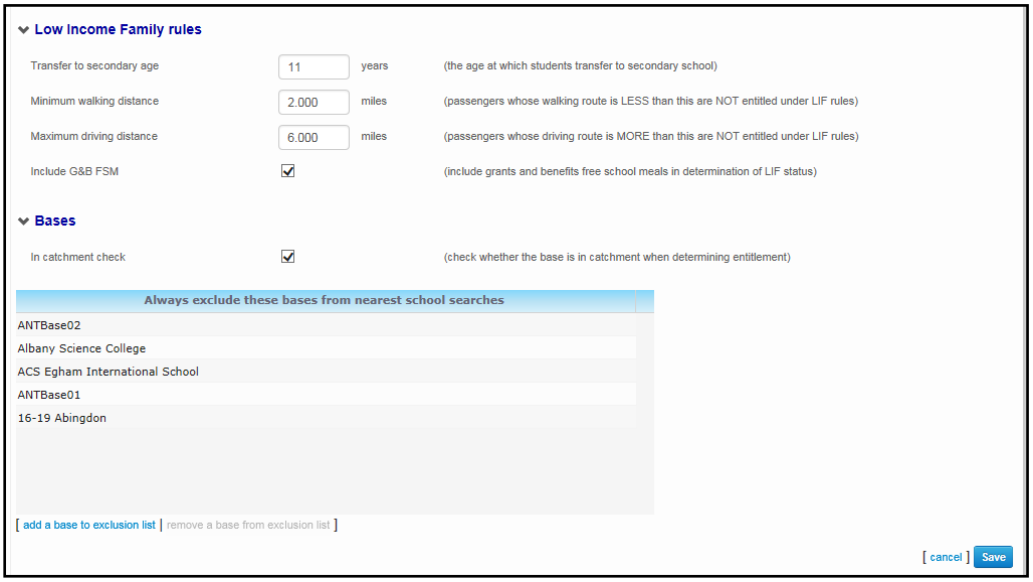
1. Select the **Admin** area and select the **Default Values and behaviours** page.
2. Ensure that the **Assessments** tab is selected. Editable fields related to assessment settings are displayed.
3. Ensure that the **Base Groups for Assessment Nearest School** section is open. A list of selectable base groups is displayed.



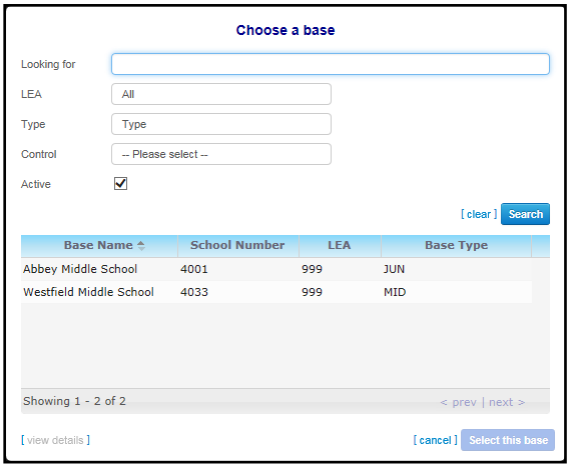
4. Select the base groups that you want to include in the Nearest School search. Only those bases that belong to the selected groups are returned as search results.
5. Click the **Save** button to save your changes.

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.



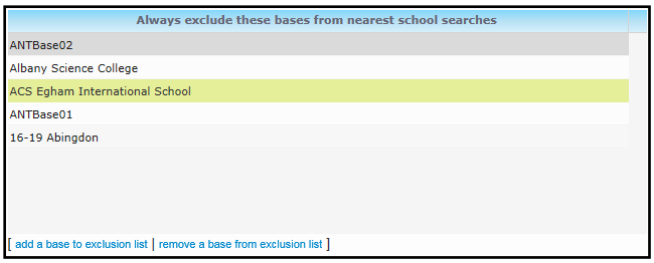
3. Click the **add a base to exclusion list** hyperlink to display the **Choose a base** dialog.



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.



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.

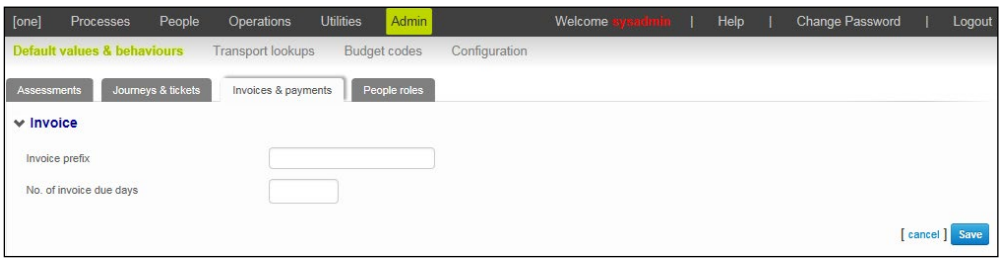
Setting Default Values for Journeys

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.

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.



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.

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.

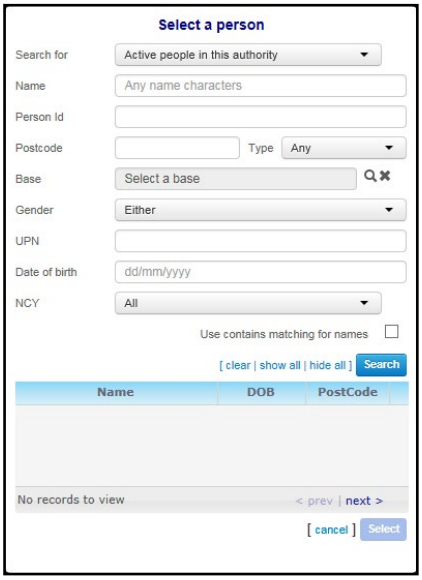
3. Open the **Contract** section and enter a default **No. of days contract should be editable after closure**.
4. Click the **Save** button to save your changes.

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.

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



   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.

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

Managing Surveyors

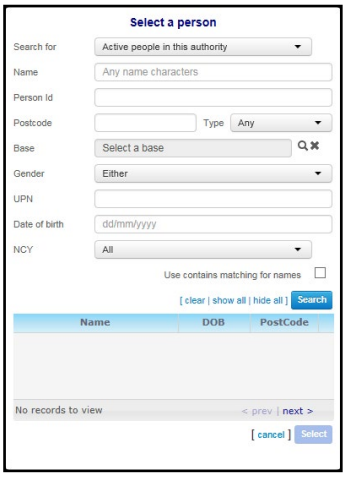
The **Admin | Default values and behaviours | People roles** tab enables you to name people in the One Transport database as surveyors. People who have been named as surveyors can be recorded as having performed route surveys and vehicle checks.

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.

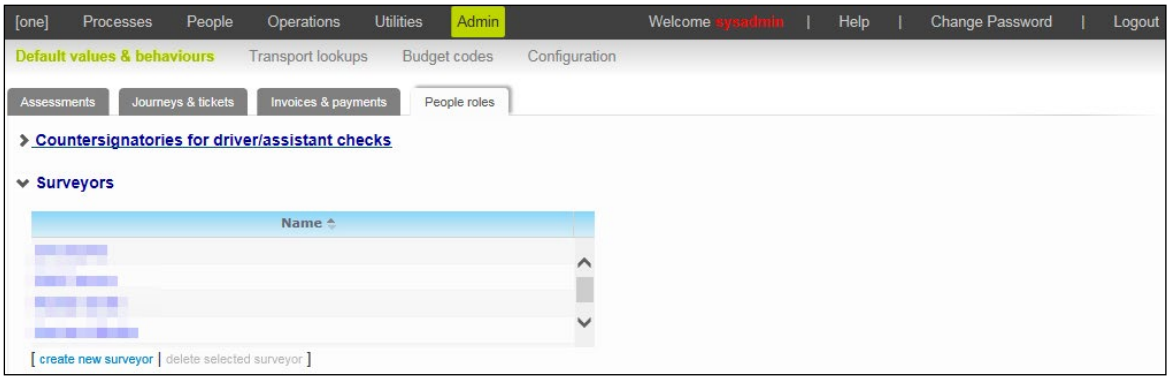
4. Select the person that you want to add as a surveyor:
   a. Click the **Name** browse to display the **Select a person** dialog.



   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

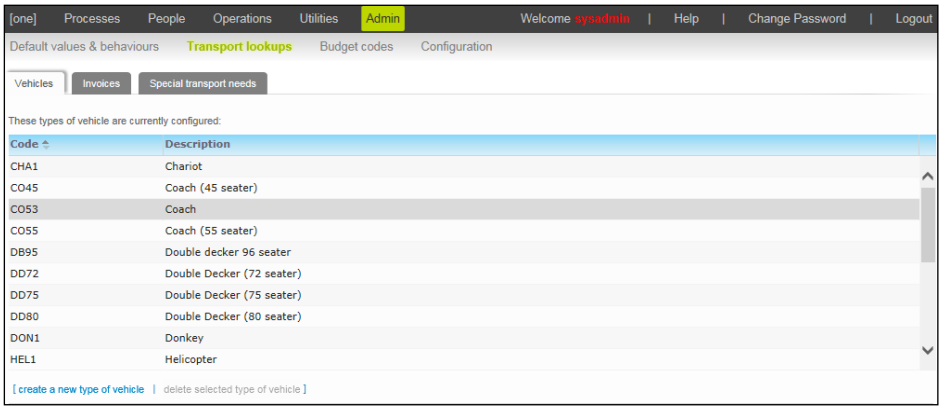
The **Transport lookups** page enables you to create, edit and delete vehicle types, invoice reasons and special need types for use elsewhere in One Transport.

Configuring Vehicle Types

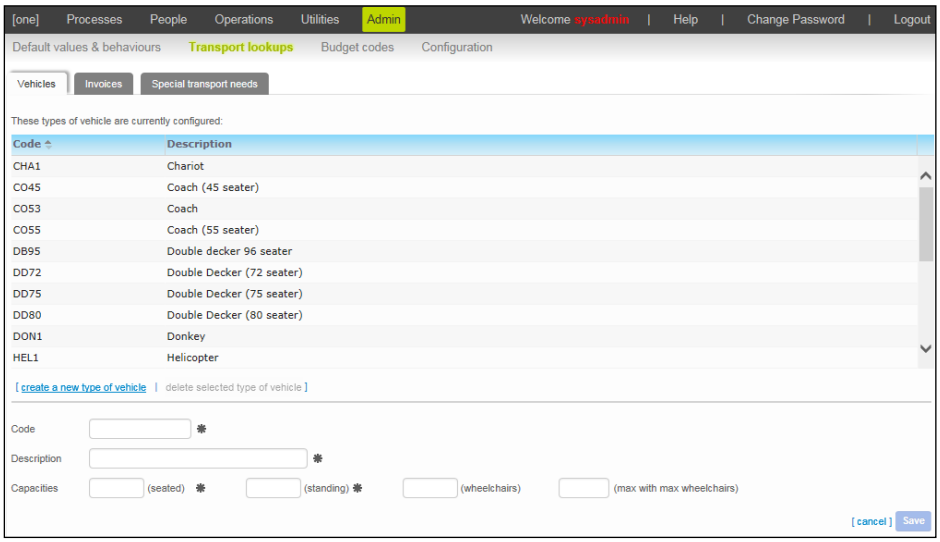
The **Admin | Transport lookups | Vehicles** tab enables you to create and edit vehicle types for use on the **Operations | Contractors | Vehicles** tab.

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.



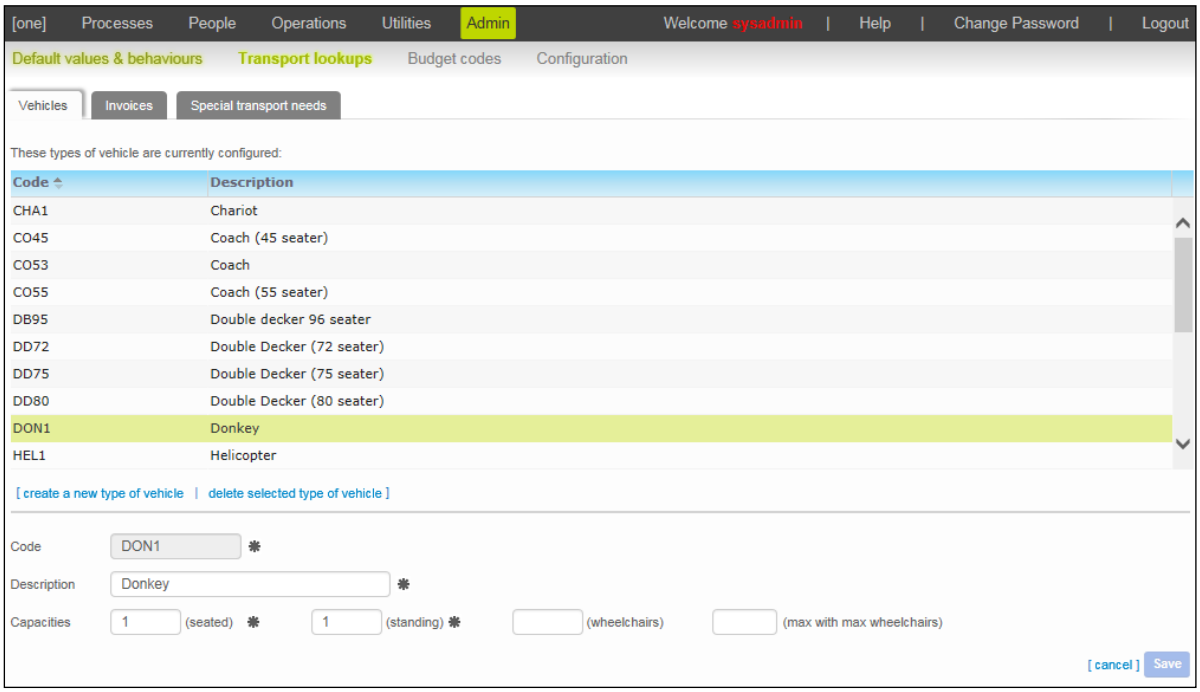
3. Click the **create a new type of vehicle** hyperlink. Editable fields relating to vehicle type details are displayed.



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.



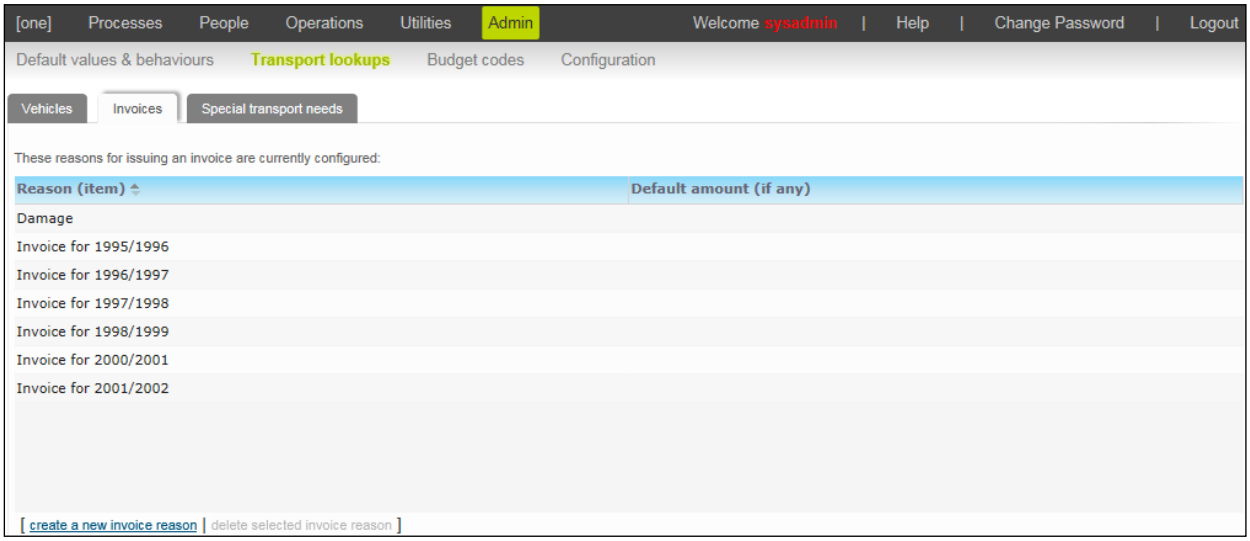
4. Click the **Delete** button to delete the vehicle type and close the dialog.

Configuring Invoice Reasons

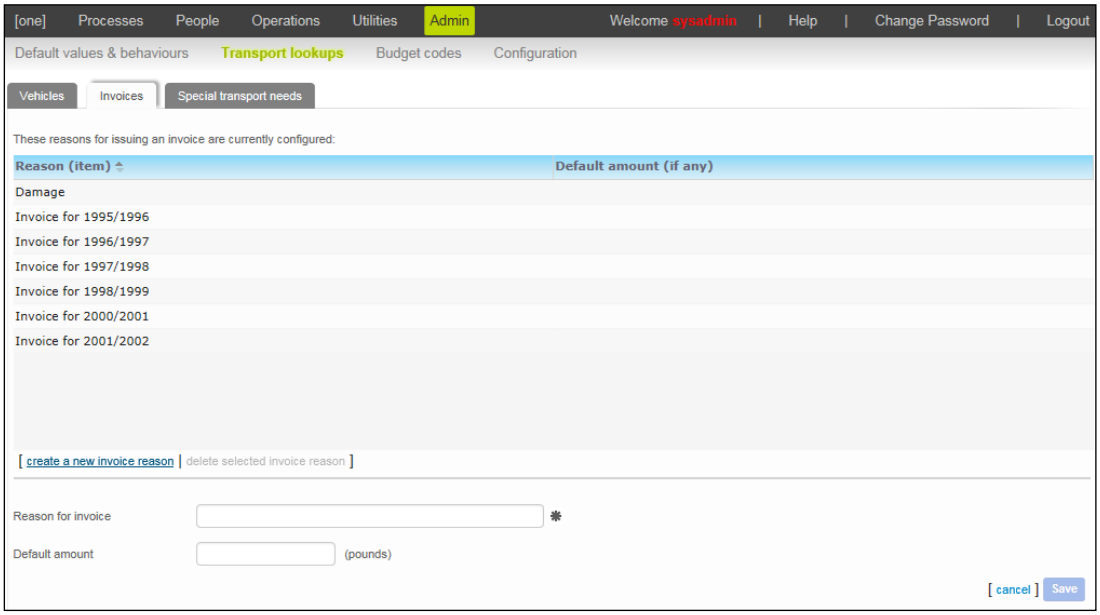
The **Admin | Transport lookups | Invoices** tab enables you to create and edit invoice reasons for use on the **Processes | Single Passenger | Invoices** and **Processes | Multiple Passengers | Invoice Passengers** tabs.

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.



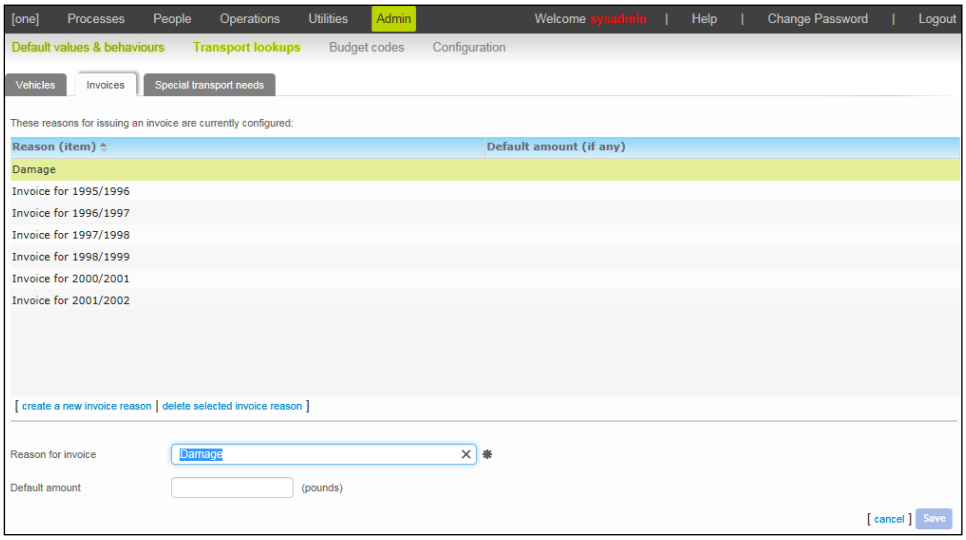
3. Click the **create a new invoice reason** hyperlink. Editable fields related to invoice reasons are displayed.



4. Enter the **Reason for invoice**.
5. 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 Invoicing a Passenger 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.



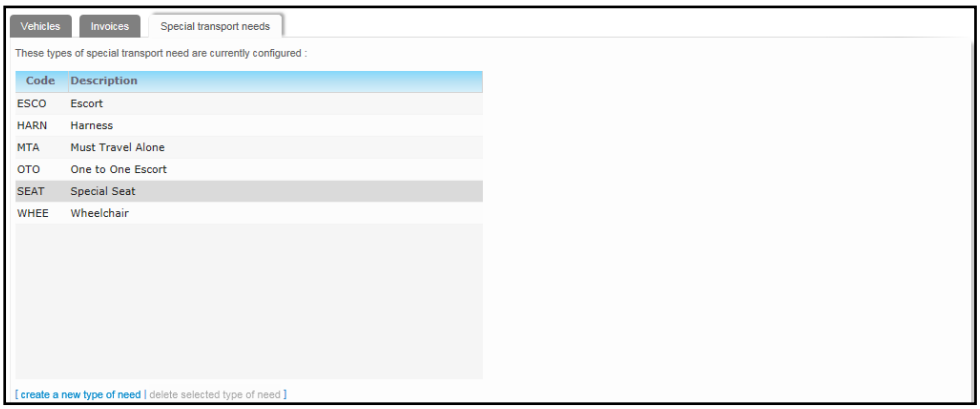
4. Click the **Delete** button to delete the reason and close the dialog.

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.

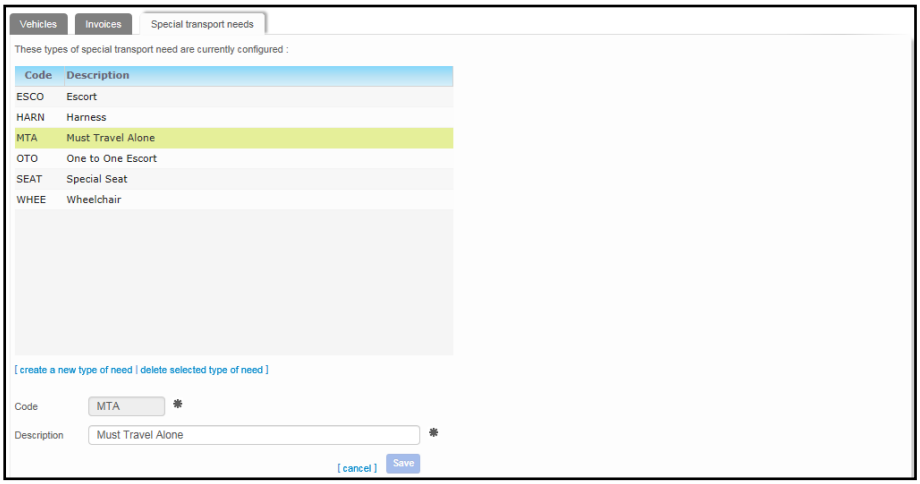


3. Click the **create a new type of need** hyperlink. Editable fields related to need details are displayed.

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.



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* *Managing Special Needs 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.
2. Click the **create a new budget code** hyperlink. Editable fields relating to budget code details are displayed.

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.

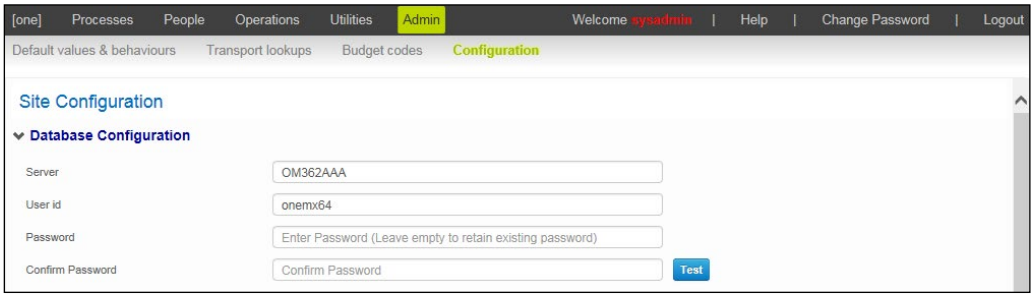
Configuration

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.



3. Enter the name of the database **Server**.
4. Enter your **User id** for the database.

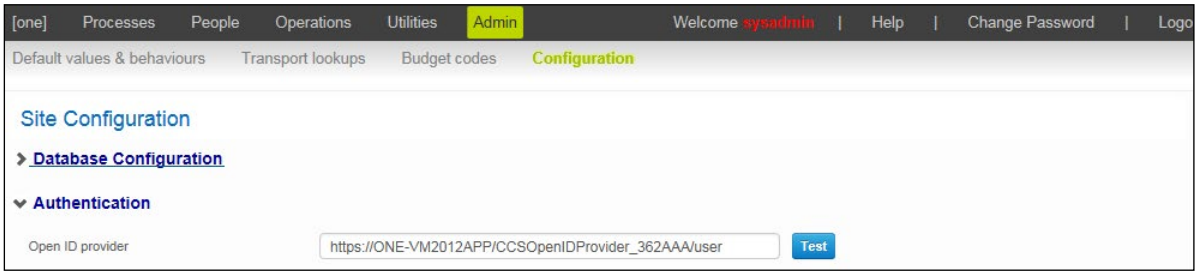
5. Enter your **Password** and then re-enter it into the **Confirm Password** box.
6. If required, click the **Test** button to test the credentials you just entered. A dialog is displayed indicating whether or not the connection was successfully established.
7. Click the **Save** button to save your 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.



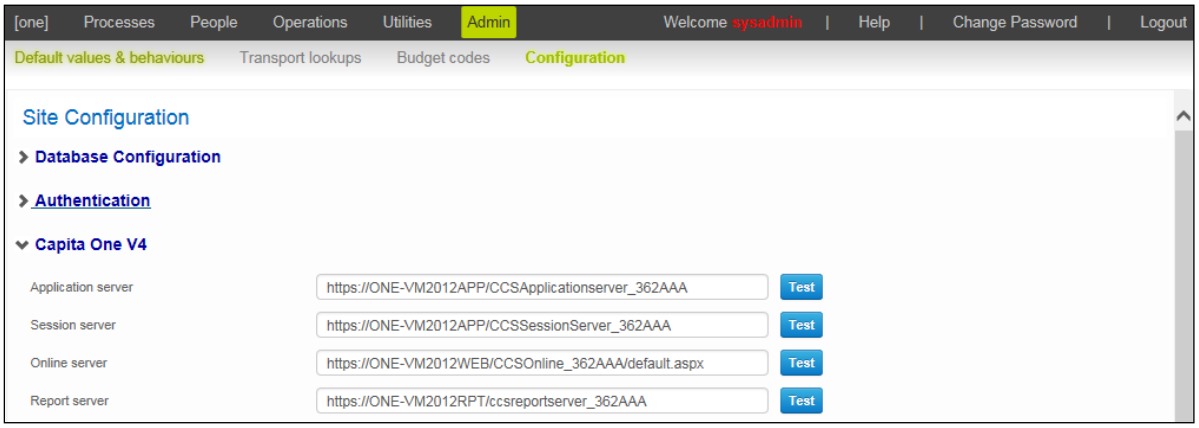
3. Enter the URL of your OpenID Provider in the **Open ID provider** box.
4. If required, click the **Test** button to test the credentials you just entered. A dialog is displayed indicating whether or not the connection was successfully established.
5. Click the **Save** button to save your changes. 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.



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.

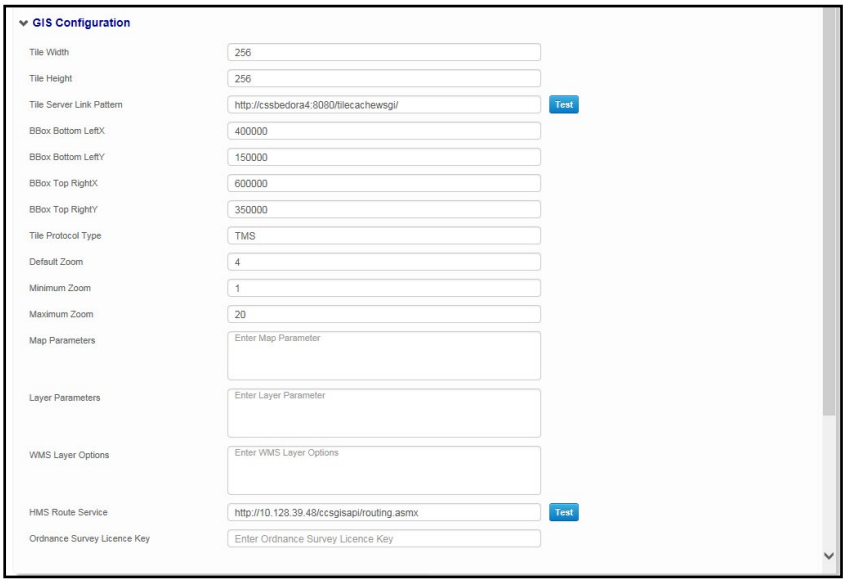
Configuring GIS

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* [One Publications](#) *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* [One Publications](#) *website.*

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



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 [One Publications](#) 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 http://dev.openlayers.org/releases/OpenLayers-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 http://dev.openlayers.org/releases/OpenLayers-2.13.1/doc/apidocs/files/OpenLayers/Layer/TMS-js.html.

     Example: `{ layername: "theNameOfYourLayer" }`

     Unless otherwise specified, One uses the following parameters as defaults:

     - **layername** – bedsmap
     - **type** – png

   - **WMS** - The parameters that can be set are defined at http://dev.openlayers.org/releases/OpenLayers-2.13.1/doc/apidocs/files/OpenLayers/Layer/WMS-js.html

     Example: `{ layername: "theNameOfYourLayer", layers: "the comma separated layers to be displayed" }`

     Unless otherwise specified, One uses the following parameters as defaults:

     - **format** – image/png
     - **layername** – OneMapCached
     - **layers** – 250k,streetview,build,roads
     - **request** – GetMap
     - **service** – WMS
     - **version** – 1.1.1

   - **WMTS** - The parameters that can be set are defined at http://dev.openlayers.org/releases/OpenLayers-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 http://dev.openlayers.org/releases/OpenLayers-2.13.1/doc/apidocs/files/OpenLayers/Layer/WMS-js.html.

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 One Publications 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

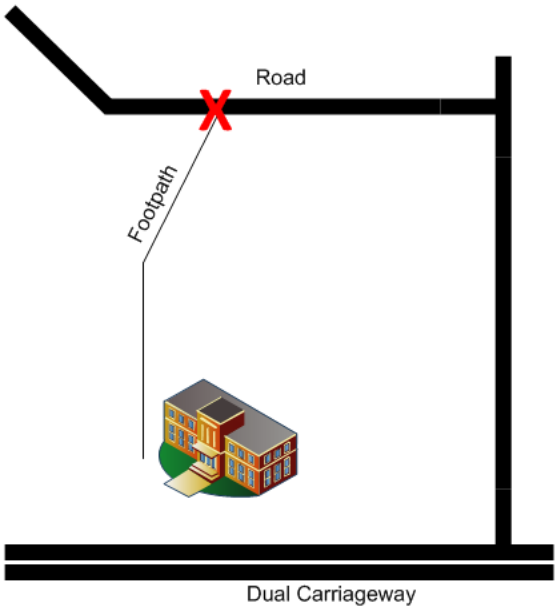
The distance calculation parameters can be used to configure how One behaves when calculating distances in certain scenarios. These parameters are configured in v4 Online via **Administration | System Administration | System admin | System defaults**, rather than through One Transport itself.

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:



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**.

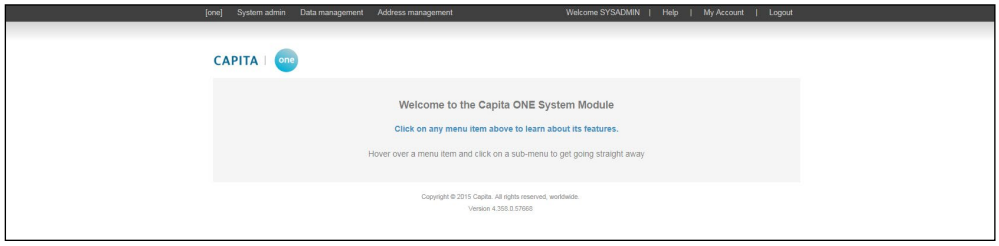
- **NE_SC_CRIT:** the part of the destination base that distances are calculated to, by default, when running the Nearest School search. Select any of the following values:
  - **1:** Nearest site
  - **2:** Nearest gate
  - **3:** Nearest gate or site
  - **4:** Nearest gate, if no gate for a site then nearest site
  - **5:** Principal site
  - **6:** Main gate.

The default value is **1**.

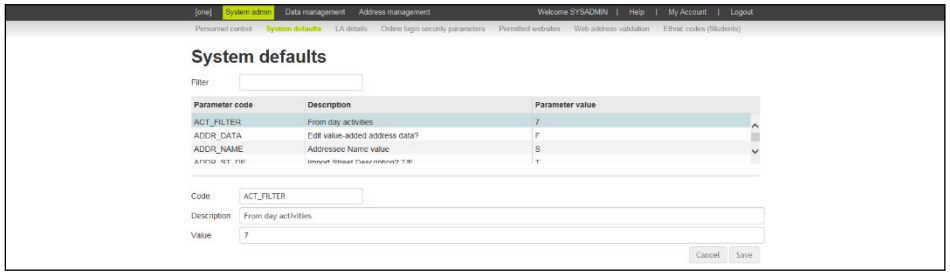
Setting Parameters

1. In the v4 Online home screen, select the **Administration** lozenge to display the **Administration** module.

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



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



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.

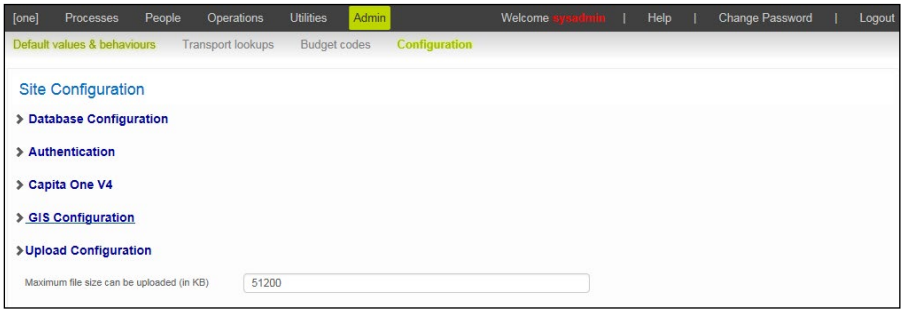
6. Click the **Save** button to save your changes. A confirmation dialog is displayed, indicating that the AppPool containing the One transport site will be restarted if you continue.

> ***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.



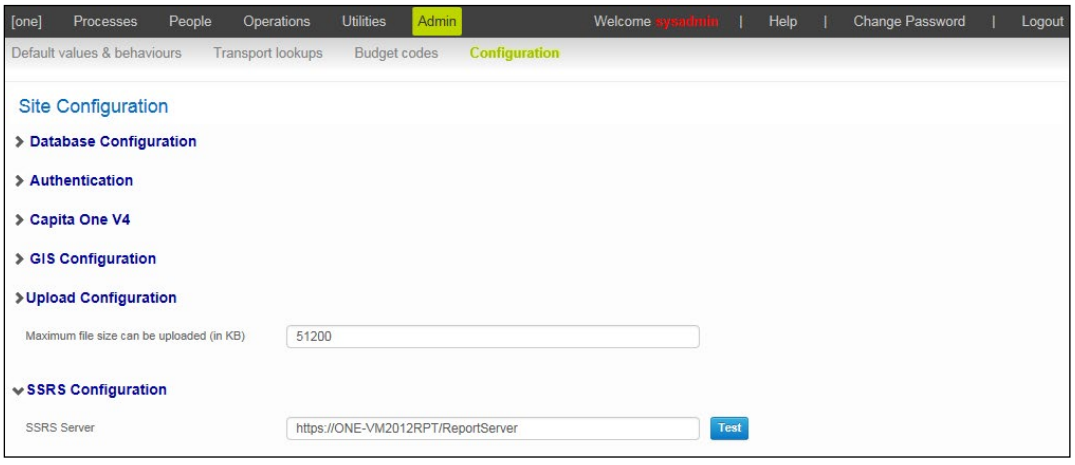
3. Enter a size limit (in kB) for files uploaded to Transport.
4. Click the **Save** button to save your changes. A confirmation dialog is displayed, indicating that the AppPool containing the One transport site will be restarted if you continue.

> ***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.



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.*

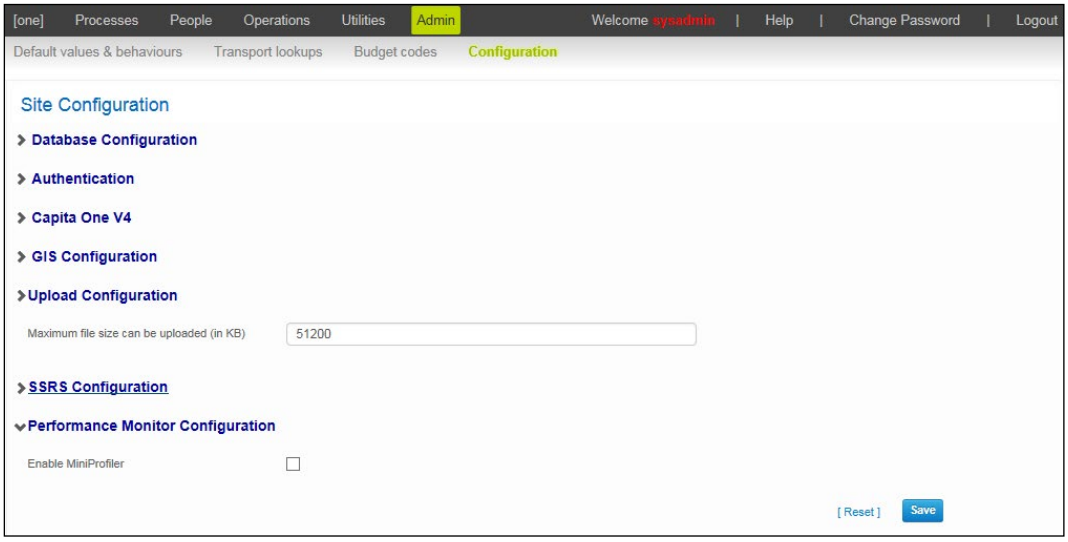
6. Click the **Yes** button to save your changes and restart the Transport AppPool.

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.



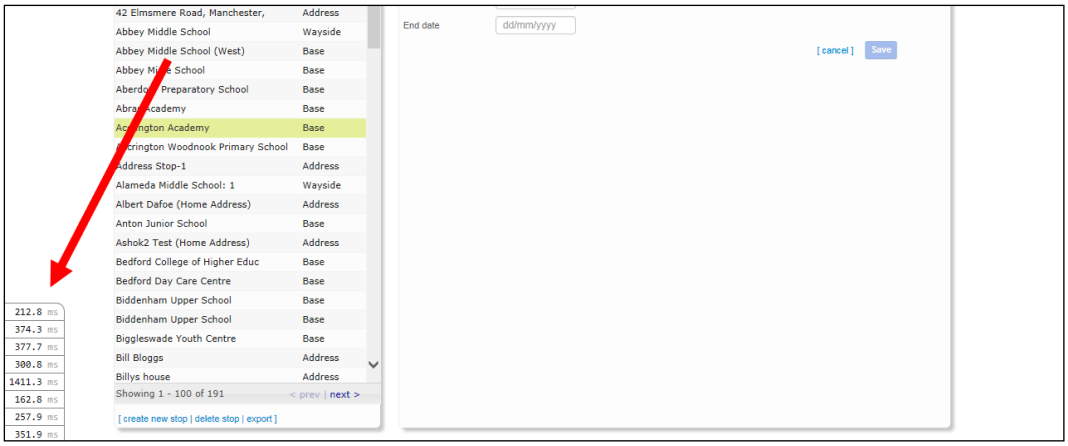
3. Select the **Enable MiniProfiler** check box.
4. Click the **Save** button to save your changes. A confirmation dialog is displayed, indicating that the AppPool containing the One transport site will be restarted if you continue.

IMPORTANT NOTE: *Restarting the AppPool logs all users out of One Transport. Ensure that all important data is saved before proceeding.*

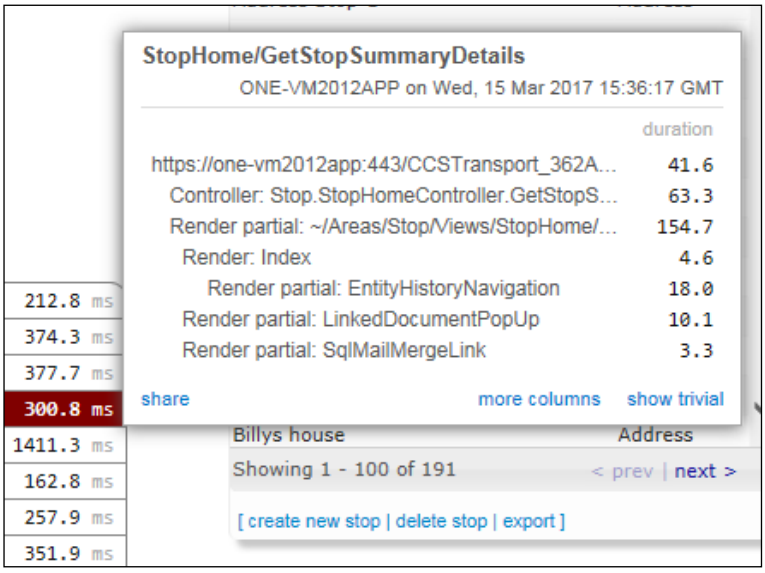
5. Click the **Yes** button to save your changes and restart the Transport AppPool.

Using the MiniProfiler

Once the application pool has reset, the MiniProfiler is displayed in the bottom corner of the screen.



Click an entry to view a breakdown of task times for that job.



The detail dialog displays the following options:

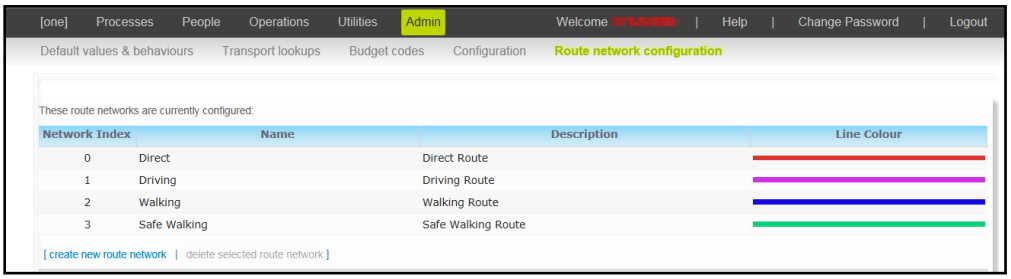
- **share** – exports the contents of the dialog to a webpage, the address of which can be shared with other parties (such as One Application Support) if needed.
- **more columns** – displays a more detailed summary of the server's response times.
- **show trivial** – displays those tasks that took 2ms 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**.



Creating a Network

1. Create a network layer in line with instructions contained within GIS handbooks.
2. Configure rwnetserver.ini to ensure the network is accessible and has a unique Network Index number.
3. From the **Admin | Route network configuration** tab, select **create new route network**.
4. Provide the unique **Network Index** number.
5. Give network a **Name**. This will be used to refer to the network throughout the rest of the system.
6. If required, provide a **Description** for the network.
7. If required, select a **Colour** for the network. This will be used to display routes using this network on maps.
8. Click **Save**.

Deleting a network

1. Highlight the network you wish to delete.
2. Click the **delete selected route network** hyperlink. A warning dialog is displayed to confirm that you wish to delete the network.
3. Click **Delete**.
4. If any system configuration parameters use this network, an error dialog is displayed advising which system configuration parameters must be changed before the network can be deleted. The network cannot be deleted while it is actively being used by any system parameter.
5. Click **OK**.

Appendix A

Report Directory Structure

The following table shows the structure of the reports directory. The directory mirrors One Transport's screens to aid ease of use. The locations of the reports themselves are shown in **bold**.

Area	Page	Search and Status tabs	Tab	Section
Processes	Single Passenger	**Summary Panel**		
		Personal Info	**Applications**	
		Status	**Assessments**	
			Journeys	
			Tickets	
People	Personal Info	**Summary Panel**		
		Search for people	Financial	
			Relationships	**Cared For**
			Special Needs	**Special Transport Needs**
			Education	**School History**
	Driver/Assistant Info	**Summary Panel**		
		Search for people	**Checks**	
			Training	
	Communications & Complaints	**Search for communications**		
Operations	Contractors	**Summary Panel**		
		Search for contractors	**Routes**	
			Vehicles	
			Checks	
			Payments	
	Contracts	**Summary**		

Report Parameters

The following table shows a list of One Transport report parameters by screen.

Area	Page	Tab	Parameter name	Type	Description
Process	Single passenger	Applications	APPLICATION_ID	Number	
		Assessments	RECORD_ID	Number	
		Invoices	STUD_ID	Number	
		Journeys	TRAN_ID	Number	STUD_TRIPS .TRAN_ID
		Tickets	TICKET_IDS	List <Number>	List of TICKET_ID
			TICKET_ID		
			STUD_ID		
People	Personal info	Education	STUD_ID	Number	STUDENT.STUD_ID
		Financial	INVOICE_IDS	List <Number>	List of INVOICE_ID
			INVOICE_ID	Number	Single INVOICE_ID
			STUD_ID	Number	
		Relationships			
		Special needs	NEED_ID	Number	Special Need ID
	Driver / assistant info	Bases	RECORD_ID	Number	
		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	

Area	Page	Tab	Parameter name	Type	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 One Publications 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

Appendix C

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 Documents	View linked documents	Yes	NA	Yes	No
		Link a new document/ update linked documents	No	NA	Yes	No
		Delete linked documents	No	NA	Yes	No
Person Administration	Person Details	View person	Yes	Yes	NA	No
		Create new and/or edit existing person	No	Yes	NA	No

Appendix C

Main process	Sub process	User action	Read	R-Write	RW-Delete	Deny
Person Administration	Person Details	View personal information	Yes	No	NA	No
		Person search	Yes	No	NA	No
Transport Admin & Utilities	Administration	View values for parameters and bases in base list	Yes	NA	NA	No
		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 & Assessment	Application	View application	Yes	Yes	Yes	No
		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
	Application Approval	Approve application	NA	Yes	NA	No
		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
		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
		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	Contracts	Edit budget codes	No	Yes	Yes	No
		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
		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: **Print Tickets**, **Issue Tickets** and **Bulk Tickets**	Yes	NA	NA	No
Transport Network	Stop	Search for and select stops	Yes	Yes	Yes	No
		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 **Routes** tab	-	-	-	-
		Hyperlink to passenger in **Boarding and Alighting** tab	-	-	-	-
		Hyperlink to route in **Boarding and Alighting** 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 **Stops** tab	-	-	-	-
		Hyperlink to stop in **Loading** tab	-	-	-	-
		Hyperlink to passenger journey in **Passengers** 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 **Driver & assistants** tabs in **People** and **Route** focuses	Yes	Yes	Yes	No
		View and edit D&PA	Yes	Yes	No	No
		View D&PA	Yes	No	No	No
	Record DBS	Control the display and recording of DBS checks	Yes	Yes	Yes	No
		View and edit checks	Yes	Yes	No	No
		Can View checks	Yes	No	No	No
	Training Course	Will control display and recording of training tab	Yes	Yes	Yes	No
		View and edit course details	Yes	Yes	No	No
		Can view course details	Yes	No	No	No
		Delete a transport need for a person	No	No	Yes	No
	LIF	View LIF	Yes	Yes	Yes	No
		Create new and/or edit existing LIF	No	Yes	Yes	No
		Delete LIF	No	No	Yes	No

Main process	Sub process	User action	Read	R-Write	RW-Delete	Deny
Transport Person	Print Invoices	Print invoices through the following pages: **Print invoices**, **Bulk Print | Invoice**	Yes	NA	NA	No
	Invoice Passenger	View invoice	Yes	Yes	Yes	No
		Create new and/or edit existing invoice	No	Yes	Yes	No
		Delete invoice	No	No	Yes	No
	Disbursements	View payments	Yes	Yes	Yes	No
		Create new and/or edit existing payments	No	Yes	Yes	No
		Delete payments	No	No	Yes	No
		Add or edit payment prefix	No	Yes	Yes	No
Student Data	Addressee	View addressee	Yes	Yes	NA	No
		Edit addressee	No	Yes	NA	No
	School History	View school history	Yes	Yes	Yes	No
		Create new and/or edit existing school history	No	Yes	Yes	No
		Delete school history	No	No	Yes	No
	SEN Needs	View disabilities	Yes	Yes	Yes	No
		Create new and/or edit disabilities	No	Yes	Yes	No
		Delete disabilities	No	No	Yes	No
	Special Transport Needs	View special transport needs	Yes	NA	Yes	No
		Create new and/or edit special transport needs	No	NA	Yes	No
		Delete special transport needs	No	NA	Yes	No
	Student Carer Details	View student carer details	Yes	Yes	Yes	No
		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

Appendix C

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 Utilities	Home	Return to home menu	Yes	NA	NA	No
		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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