

Capita



Transport V4 – Implementation Package

Professional Services

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Introduction

The Capita One V4 Transport module was released in Autumn 2014 after extensive consultation with Local Authorities on how they wished the module to look and perform.

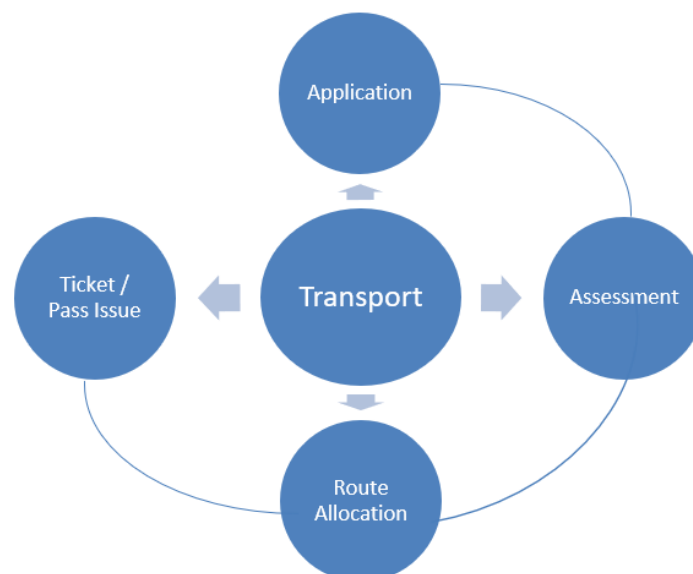
This package ensures customers can support their Transport teams in successfully implementing the software and in making best use of the features and functions this module brings.

Benefits

Transport V4 has been developed and refined in conjunction with our customer base.

It is designed to reflect and support the core business processes of a Local Authority Transport team. These core business processes have been identified as:-

- **Application stage**
A record of an application for home to school transport.
- **Assessment stage**
For both mainstream and children with special transport needs. This stage allows LA's to determine a pupil's eligibility for travel assistance based upon different criteria and circumstances.
- **Allocation of pupil journey**
For both mainstream home to school journeys and special transport for those pupils who require specialised transport provision.
- **Ticket/pass issue**
For those pupils who require a bus pass for travel from home to school.



Transport V4 also allows Transport Managers and Transport Planners to conduct route and contract support functions:-

- Route planning and scheduling.
- Contract maintenance, payment, and compliance.
- Contractor maintenance
- Budget monitoring

Transport V4 introduces key concepts which are designed to speed up the processing of Transport application for users. In addition, with increased use of GIS v4 within the Transport module, users can gain additional efficiencies in their business processes by maximising the benefits of this optional aspect of the module.

The implementation process also includes a review of current business procedures with recommendations on how to make efficiency savings (if necessary).

The Transport v4 implementation services have been designed to assist your Local Authority to implement the module successfully. Capita recommend all sites take up the Core service as a minimum as this will ensure your Transport team implements the module successfully at the basic level. The additional options available means that Las who wish ensure the implementation is bringing about the maximum benefits for its users are supported in achieving this.

Pre-requisites

Customers should have the following pre-requisites:-

- Bases V4 module
- Ideally but not business critical – GIS.

Service Overview

Capita will assist in the successful implementation of the Transport v4 Module by providing the following:



Capita believe in a strong emphasis on a proactive partnership with the customer. The Capita Project Coordinator will work closely with the customer's appointed Project Lead throughout the project to achieve this. The Capita Project Coordinator is the coordinating Capita staff member assigned to the project and is therefore able to respond authoritatively to the needs of the project and will actively and continually monitor progress on all risks, issues, actions, and decision in order to ensure successful delivery.

The Implementation package is described in the table below.

Element	Days	Description
Planning Session (Remote)	1 (remote)	The Capita Project Manager will arrange on-site session dates and discuss pre-requisites for the initial sessions. A Transport Knowledge Specialist will be assigned to support you fully through the implementation process.
On-site Review and v4 Implementation Approach	1	Your Transport Knowledge Specialist will carry out a review of current systems and processes and lead the discussion around key business functions with relevance to v4 Transport.
Business Process Mapping	1-2	Your Transport Knowledge Specialist will work closely with your Transport Team to define and document the “to be” system processes following implementation of Transport v4, allowing the team to align the system configuration to best support the agreed processes.
Transport Planning Process Documentation		Your Transport Knowledge Specialist will provide a comprehensive write-up with a review of Business Processes including the proposed set-up and revised implementation approach for Transport v4.
Project Checkpoint (remote)	1 (remote)	Your Project Manager will discuss and review the documentation and sign-off the system configuration with you and provide any pre-requisites for the remaining sessions.
Module Configuration in TEST and Module Admin Training	1	Your Transport Knowledge Specialist will configure the Transport module in your TEST environment in line with the agreed configuration. Module Admin Training will also be provided on Alerts, Batch Routines, System Parameters, Reports Administration etc.
Core user Training	1-2	Your Transport Knowledge Specialist will provide training for core users including navigation around the module, searching for people, how to process applications for home to school travel following the agreed processes as documented in the Transport Planning Process document
Project Checkpoint (remote)	1 (remote)	Your Project Manager will discuss the configuration and review the training with you and provide any pre-requisites for the final session

Element	Days	Description
Module Configuration in LIVE and Additional Training / Floor Walking.	1	Your Transport Knowledge Specialist will configure the Transport module in your LIVE environment in line with the agreed configuration. Any additional training and support will be provided as necessary and the Knowledge Specialist will floor walk with the team to answer any outstanding queries and other support and guidance.
Post-Implementation Review	1	Once your Transport Team have had sufficient time to use the system, your Transport Knowledge Specialist will revisit to review the use of the module, answer any queries and ensure the benefits of the module are being realised.
Project Checkpoint (remote)	1 (remote)	Your Project Manager will discuss the project closure process and with agreement, will sign-off that all deliverables of the project have been successfully fulfilled.

Service Details

The training and support detailed here is managed in a formal project. You will be assigned a dedicated Project Manager to ensure that timescales are met, risks and issues are managed and that pre-requisites are completed before key deliverables are due.

The core service will ensure Transport v4 is implemented in line with the requirements of your Transport Team and that improved processes are established and bringing benefits to the team.

Additional functionality such as GIS, Portal Configuration, reports and letters and additional training for key members of the team can be selected as [additional service options](#) to the Core Pack.

Session 1: V4 Review of Implementation Approach

Objectives	<ul style="list-style-type: none"> • To review the Local Authorities current policies and practices in regards to Home to School Transport provision. • To provide a demonstration of the features and functionality of Transport V4. • To make decisions on best utilisation of Transport V4 functionality in line with current operating procedures.
Audience	<ul style="list-style-type: none"> • One Co-ordinator and current Transport team members who will be using the module on a daily basis.
Standard Agenda	<ul style="list-style-type: none"> • Introductions • Purpose of today and expectations • Review and discussion around current working practices • Demonstration of Transport V4 module and how this will meet your expectations and fit in with current working practices • Discussion and questions around implementation approach and timescales for the project • Any further questions • Conclusion and summarise next steps.
Outcomes	<ul style="list-style-type: none"> • Local Authority are aware if how Transport V4 works and functionality and how best it fits in with current procedures.

	<ul style="list-style-type: none">• Everyone understands timescales and project implementation approach.
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Session 2: Business Process Mapping

Key Prerequisites (full list provided in RAID log)	<ul style="list-style-type: none"> • Any current documentation that is used in the Home to School procedure, including current application forms, policy statements etc. • A member of the Transport Team who is able to demonstrate how current applications are processed. • Any other members of the Team who may be involved in the Finance and contracts aspect of Transport to be able to show how this procedure currently works.
Objectives	<ul style="list-style-type: none"> • To agree and document the current process for dealing with Home to School Transport applications and associated administration, route and contract (finance) compliance procedures.
Audience	<ul style="list-style-type: none"> • Transport Team members who provide and administer the current Home to School arrangements and those for are responsible for route and contract (finance) compliance.
Standard Agenda	<ul style="list-style-type: none"> • Introductions • Outline of the day. • Review of current operating procedures • Questions and clarifications • Demonstration of current operating practices. • Review and conclusions
Outcomes	<ul style="list-style-type: none"> • A Business process document which correctly illustrates the current operating procedures for Home to School Travel (and associated administration including finance elements). • Recommendations on how the current operating procedures will fit-in with the features and functions of Transport V4. • A Transport Process flowchart which has recommendations to improve efficiency.

Session 3: Module Configuration in TEST and Module Admin Training

<p>Key Prerequisites (full list provided in RAID log)</p>	<ul style="list-style-type: none"> • Access to a V4 TEST environment to be able to establish a Transport TEST environment with appropriate report access. • GIS V4 to be installed and set-up if required for LA Transport processes. • The appropriate Transport V4 licence has been requested and applied to the TEST Environment. • LA to request a Technical install of Web Service Components for his module from capita Support and the web Cache user to be set-up in TEST
<p>Objectives</p>	<ul style="list-style-type: none"> • To establish a TEST environment for Transport V4 with full functionality. • To set-up users with appropriate permissions access. • Training to be provided on alerts, batch routines, system parameters, reports and background administration, values and configurations.
<p>Audience</p>	<ul style="list-style-type: none"> • One Co-ordinators who manage the administration of users/permissions • Key user(s) of the Transport Module who can advise on permission access and transport values (eg statutory distance criteria) • Those officers responsible for writing / running Transport reports or higher level admin routines • Internal I.T. on hand for any configuration issues.
<p>Standard Agenda</p>	<ul style="list-style-type: none"> • Introductions and outline of day. • Checkpoint that all pre-requisites have been met. • Check data validation within the Transport environment • Establish default values and set-up module configuration. • Module admin training • Questions and clarifications • Conclusions and recommendations.

Outcomes	<ul style="list-style-type: none">• The Transport V4 module is successfully established and working correctly within the TEST environment.• Users have the correct permissions required for training and UAT• The ONE co-ordinator is familiar with the module and system admin tasks required• A dataset for training is available.
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Session 4: Core User Training

<p>Key Prerequisites (full list provided in RAID log)</p>	<ul style="list-style-type: none"> • Access to Transport v4 within the TEST environment • Users to have correct access permissions to be able to perform the necessary scenarios for Transport training • Users bring along some “real world” cases for testing within the Transport v4 environment
<p>Objectives</p>	<ul style="list-style-type: none"> • To provide an overview of the key module areas. <ul style="list-style-type: none"> • Module navigation • How to find passengers, people, routes etc. • Nearest school search. • Overview of the current key module areas in line with business processes <ul style="list-style-type: none"> • Applications • Assessments • Journeys • Tickets • Routes and Stops • Contracts • Contractors • Communications and Complaints. • Finance training for those Officers responsible for paying invoices and/or budget responsibilities.
<p>Audience</p>	<ul style="list-style-type: none"> • Transport and Finance team members who will be using the module on a daily basis.
<p>Standard Agenda</p>	<ul style="list-style-type: none"> • Introductions • Outline and objectives of the day • Agenda to be set around the key objectives as detailed above and tailored accordingly.
<p>Outcomes</p>	<ul style="list-style-type: none"> • Delegates are comfortable and confident in using Transport V4 and can appreciate how the features and functions work in line with current business processes. • Delegates can appreciate the support that the module can provide in supporting them to perform their duties and responsibilities.

Session 5: Module Configuration in LIVE and Additional Training / Floor walking

Key Prerequisites (full list provided in RAID log)	<ul style="list-style-type: none"> • Access to V4 LIVE Environment to be able to establish a Transport LIVE Environment with appropriate report access • GIS V4 to be installed and set-up if required for LA Transport processes • The appropriate Transport V4 licence has been requested and applied to the LIVE environment • LA to request a Technical install on Web Service Components for this module from Capita Support and the Web Cache User to be set-up in LIVE.
Objectives	<ul style="list-style-type: none"> • To set-up Transport V4 in a LIVE environment • To set-up users with appropriate permissions • To provide any additional support and training as necessary. • Knowledge specialist to be available to ensure initial bedding in of the module once fully operational.
Audience	<ul style="list-style-type: none"> • ONE Co-ordinator responsible for admin tasks • Transport team members who will be regular users of the module. • Internal I.T. on hand for any configuration issues
Standard Agenda	<ul style="list-style-type: none"> • Set-up and configure Transport V4 within the LIVE environment • Data validity check • Default values and set-up confirmed and approved • Release the LIVE environment to the audience • Questions and further training / support as requested • Floor walking and on-site availability to ensure smooth transition
Outcomes	<ul style="list-style-type: none"> • Transport V4 module is successfully set-up and configured correctly in the LIVE environment • Users have the correct permissions to perform their daily tasks and routines

	<ul style="list-style-type: none">• The ONE Co-ordinator is familiar with the module and system admin tasks involved• Users are happy with the module and have fully satisfied themselves that the module will provide them the necessary support and provide home to school transport provision.• Users are fully conversant with procedures and navigation to fully perform their daily tasks.
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Session 6: Post Implementation Review

Key Prerequisites (full list provided in RAID log)	<ul style="list-style-type: none"> • Transport v4 in the LIVE environment • Users have been using the system for a minimum of 4 weeks •
Objectives	<ul style="list-style-type: none"> • To review the implementation approach • To review how use of the module and processes is proceeding • To identify and (if necessary) provide any additional training and support. •
Audience	<ul style="list-style-type: none"> • One Co-ordinator • Transport Team members who have been using the module on a daily basis. •
Standard Agenda	<ul style="list-style-type: none"> • Review and discuss the implementation approach • Discuss any areas of concern • Address areas of concern and provide immediate support or suggest further training and support that may be necessary. • Questions and conclusions • Further Capita ONE packages that may further enhance the product and support for the customer. •
Outcomes	<ul style="list-style-type: none"> • The Transport Team have an opportunity to resolve any concerns • Any recommended changes and enhancements are identified and documented. • Any changes to the implementation approach are discussed and considered for future reference. • Any further enhancements are discussed and identified.

Additional Service Options

The following service packages are also available from our Professional Services team, please speak to your Business Development Manager for further information and pricing:

Optional Element	Sessions	Description
Process-specific User training options.	1	Should users of the Transport module require any additional training time on any of the specific areas of the module (eg Finance elements and Budget control), an additional bespoke training session can be arranged.
Portal configuration and training (existing Citizen's Portal Customers).	1	This session demonstrates the configuration of the Transport area of the Citizen's Portal and train users in how parents will use the system and how to process incoming applications
Supported User Acceptance Training (UAT)	1	Users carry out system and process testing once the Test configuration on the module has been completed. This session provides support from our Knowledge Specialist to help ensure the testing is comprehensive and to quickly resolve any permissions or set-up issues.
Data Migration (for non-Transport v3 customers)	TBC	If you are a new customer to Transport v4 you may benefit from assistance in migrating data from your existing system(s) into Transport v4.
Letters and Reports	As required	Any amendments to letters and/or reports or new letters/reports that need creating can be priced on an individual basis.
GIS v4 (for existing GIS Customers).	1	Transport v4 is best utilised in conjunction with GIS v4. This session will enable customers to understand the benefits and how to achieve best value of the Transport module through implementation of GIS v4.
GIS v4 (for new GIS Customers)	TBC	If you have purchased GIS v4 to supplement the Transport module these sessions assist you in configuring and implementing GIS for the first time.