



Department
for Transport

Street Manager

Performance based inspections user guide

Version 1.0
March 2023

HA user journey



CITY OF WESTMINSTER admin access

[Organisation profile](#)

Manage and update organisation details and contact information

[Organisation users](#)

Manage user access for individuals in your organisation and contractors

[Invite or remove an individual user](#)

[Workstreams](#)

Manage and update workstreams and associated contractor or direct labour information

[Contractor organisations](#)

Manage and add contractors authorised to conduct works on your behalf

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Export organisational data in a raw format

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Create and download data reports for specific activities

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Set up organisations and generate sample inspections

[Geographical areas](#)

Manage and add your organisation's network of geographical areas.

[Fee Matrix](#)

Manage organisations fee matrix

“ Click on "Sample inspections, while logged in as an admin. ”



Select promoter to generate sample inspections

Select promoter

Start typing and/or select promoter

You can only select a promoter that you haven't added samples for

Continue

Select promoter to generate sample inspections

Select promoter

Start typing and/or select promoter

You can only select a promoter that you haven't added samples for

| |
|-------------------------------|
| ALLERDALE BOROUGH COUNCIL |
| AMEY HIGHWAYS SOUTH EAST UNIT |
| AMEY HIGHWAYS SOUTH WEST UNIT |
| ANDOVER CABLE SERVICES |
| ANGLIA CABLE |
| ANGLIAN WATER |
| AQ LTD |
| ARQIVA LTD |
| BCM NORTH AND EAST |
| BCM SOUTH |

Continue

“ To start, add a promoter. In the ‘select promoter’ window, use the drop-down menu to find a promoter org. Then select ‘continue’ ”



Select promoter to generate sample inspections

Do you have a history of the promoter's last two financial years inspection units?

☐ Yes

☒ No

Enter baseline amount of yearly inspection units

This forecast amount should be provided by the promoter and will be used to generate the first year of sample inspections

Baseline yearly inspection units

Continue



You will now be asked if you have a history of the promoter's last 2 financial years inspection units. If it is a new org, you can select 'No' and enter the baseline inspection units.



Do you have a history of the promoter's last two financial years inspection units?

☒ Yes

Enter and select the last two financial years inspection units

This will be used to calculate the average inspection units

2021/22

270

2020/21

330

☐ No

Continue

“

In most cases you will be able to enter the inspection units for the previous 2 years. Then press continue.

”



Select promoter to generate sample inspections

What inspection rate will the promoter start with?

This will be the baseline rate for the first quarter, rate can then be adjusted manually each quarter based on performance

Inspection rate

You can only enter 30, or 50

 %

Continue

“ You will now be able to enter the inspection start rate provided by the DfT. ”



You will only be able to enter either 30% or 50% as the starting band. An error will appear if you try to enter another value.

There was a problem

Inspection rate amount can only be 30 or 50

Select promoter to generate sample inspections

What inspection rate will the promoter start with?

This will be the baseline rate for the first quarter, rate can then be adjusted manually each quarter based on performance

Inspection rate

You can only enter 30, or 50

Inspection rate amount can only be 30 or 50

 %

Continue



Select promoter to generate sample inspections

Confirm quarterly sample inspections

Number of quarterly sample inspections

This is the number of inspections to be scheduled each quarter. This amount can be updated each quarter.

You can schedule up to **23 sample inspections** across category A, B and C per quarter

Category A

 per quarter

Category B

 per quarter

Category C

 per quarter

Continue

“

On the next screen you will see the number of sample inspections you can schedule for this quarter. Under the new regulations you no longer need to carry out a rigid 10% each across categories A B and C. You must have a minimum of 5%. (5% of the total number of inspection units for the year.)

”



There was a problem

You can only schedule 23 samples across category A, B and C

You must enter a minimum of 4 category A sample(s)

Select promoter to generate sample inspections

Confirm quarterly sample inspections

Number of quarterly sample inspections

This is the number of inspections to be scheduled each quarter. This amount can be updated each quarter.

You can schedule up to **23 sample inspections** across category A, B and C per quarter

You must enter a minimum of 4 category A sample(s)

You can only schedule 23 samples across category A, B and C

Category A

1 per quarter

Category B

15 per quarter

Category C

10 per quarter

Continue



You cannot enter more than the number of sample inspections indicated on the screen. If you attempt to enter a higher total, or if any of the values for a category fall below the minimum 5% you will receive an error. Ensure that you correct the figures before selecting 'continue'



Select promoter to generate sample inspections

Review details

Promoter details

| | | |
|-------------------------|-------------------|------------------------|
| Promoter | GAMMA TELECOM LTD | |
| Yearly inspection units | 300 | Change |
| Inspection rate | 30% | Change |

Quarterly sample inspections

[Change](#)

| | |
|------------|----------------|
| Category A | 4 per quarter |
| Category B | 15 per quarter |
| Category C | 4 per quarter |

Confirm details



On the next screen you will have a chance to review the details you just entered. If the details look correct press 'Confirm details'.



✓ Promoter's details and samples have been set for GAMMA TELECOM LTD

List of promoter sample inspections

Generate samples

Add and manage promoters sample inspections

End quarter

[Select promoter for sample inspections](#)

| Promoter | Yearly inspection units | Inspection rate | Quarterly samples remaining | Quarterly progress | Options | |
|--|-------------------------|-----------------|-----------------------------|--|--------------------------------|----------------------------------|
| BLACKPOOL BOROUGH COUNCIL | 1000 | 50% | A: N/A B: 0 C: 0 | A: 0 out of 13 B: 0 out of 50 C: 0 out of 60 | Update details | Archive promoter |
| GAMMA TELECOM LTD | 300 | 30% | A: N/A B: 0 C: 0 | A: 0 out of 4 B: 0 out of 15 C: 0 out of 4 | Update details | Archive promoter |
| Smoke Test Promoter | 894 | 30% | A: N/A B: 6 C: 0 | A: 0 out of 22 B: 0 out of 23 C: 0 out of 22 | | |
| VIDEOTRON CORPORATION (HARROW) | 300 | 30% | A: N/A B: 0 C: 0 | A: 0 out of 5 B: 0 out of 10 C: 0 out of 8 | Update details | Archive promoter |

Showing 1 - 4 of 4 results

“ On the next screen you can see a summary of all the promoter samples you have added. Please note that once you have started to generate samples, the ‘Update details option will disappear’. ”



✓ Promoter's details and samples have been set for GAMMA TELECOM LTD

List of promoter sample inspections

Add and manage promoters sample inspections

[Select promoter for sample inspections](#)

Generate samples

End quarter

Promo

[Back](#)

Quarterly progress

Options

What percentage of samples would you like to generate?

This will be a percentage of your quarterly sample inspections limit

- ☐ Up to 33%
Recommended during the first month of the quarter
- ☒ Up to 66%
Recommended during the second month of the quarter
- ☐ Up to 100%
Recommended during the last month of the quarter

Continue

“ To generate samples select the ‘generate samples’ button in the top right corner. On the next screen you will have the option to select what percentage of samples you would like to generate. ”



[Applications and works](#)

View and manage applications and works

[View and manage Duration challenges](#)

[Fixed penalty notices \(FPN\)](#)

View and manage FPNs

[Inspections](#)

View and manage all inspections

[Registered reinstatements](#)

View and manage reinstatements

[Comments](#)

Review and respond to outstanding

Inspections list

Scheduled and logged inspections

Sample inspections due

Filter options

Search street name, town, area

Search works reference

Search USRN

Search promoter name

[Apply filters](#)

[Clear filters](#)

“To see the inspections you have generated, select the inspections tile on the home page, then select the ‘Sample inspections due’ tab on the inspections list page.”



[Apply filters](#) [Clear filters](#)

Sample inspections for all affiliated promoters

| Works reference | Promoter | Inspection category | Road/Street | Area/Town | Works location |
|--------------------------------------|---------------------|---------------------|-------------|----------------|---------------------------------|
| RST1679327117208 | Smoke Test Promoter | Category B | Fake Street | London, LONDON | some works location description |
| SUB1679327102741 | Smoke Test Promoter | Category B | Fake Street | London, LONDON | some works location description |
| INSP-CA1679326903421 | Smoke Test Promoter | Category B | Fake Street | London, LONDON | some works location description |
| INSP-R1679326892599 | Smoke Test Promoter | Category B | Fake Street | London, LONDON | some works location description |
| XXV1679326773487 | Smoke Test Promoter | Category B | Fake Street | London, LONDON | some works location description |
| XWV1679326771340 | Smoke Test Promoter | Category B | Fake Street | London, LONDON | some works location description |

“ You will now see the inspections you have generated . ”



List of promoter sample inspections

Add and manage promoters sample inspections

[Select promoter for sample inspections](#)

Generate samples

End quarter

| Promoter | Yearly inspection units | Inspection rate | Quarterly samples remaining | Quarterly progress | Options |
|----------|-------------------------|-----------------|-----------------------------|--------------------|---------|
|----------|-------------------------|-----------------|-----------------------------|--------------------|---------|

Are you sure you want to end the quarter?

By ending the quarter you won't be able to create anymore samples for this current quarter.

Yes, end quarter

[No, take me back](#)

“ To end the quarter, select ‘end quarter’ in the top right hand corner of the samples summary page, then select ‘Yes end quarter’ to confirm. You will then see a confirmation notice at the top of the screen to confirm that the quarter has been ended. ”

✓ Quarter ended, you can now review promoter details

List of promoter sample inspections

Start quarter

Add and manage promoters sample inspections

[Select promoter for sample inspections](#)

| Promoter | Yearly inspection units | Inspection rate | Quarterly samples remaining | Quarterly progress | Options |
|---|-------------------------|-----------------|-----------------------------|--|---|
| BLACKPOOL BOROUGH COUNCIL | 1000 | 50% | A: N/A B: 0 C: 0 | A: 0 out of 13 B: 0 out of 50 C: 0 out of 60 | Update details Archive promoter |
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| Smoke Test Promoter | 894 | 30% | A: N/A B: 0 | A: 0 out of 22 B: 0 out of 23 | Update details Archive promoter |

✓ Quarter ended, you can now review promoter details

List of promoter sample inspections

Add and manage promoters sample inspections

[Select promoter for sample inspections](#)

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| Smoke Test Promoter | | | A: N/A B: 0 C: 0 | A: 0 out of 22 B: 0 out of 23 | Update details Archive promoter |


Start quarter

What is the start date of the quarter?

Enter the start date of the quarter

Quarter start date

Day Month Year

01 10 2022 

Continue

“ To start the next quarter select ‘Start quarter’ and enter the start date on the next screen. ”



✓ Quarter started, you can now start generating samples

List of promoter sample inspections

Add and manage promoters sample inspections

Select promoter for sample inspections

Generate samples

End quarter

There was a problem

Date must be day 1 of the quarter

What is the start date of the quarter?

Enter the start date of the quarter

Quarter start date

Date must be day 1 of the quarter

Day Month Year

01 06 2022



Continue

“ You will then see a confirmation message confirming that the quarter has started. ”



Please note that Street Manager will not accept dates that are not day 1 of the quarter.



Performance Reporting

Create and download data reports for specific activities



Number of fixed penalty notices

Total number of fixed penalty notices broken down by their status



Sample Inspection pass/fail rate

Outcome and current status of recorded sample inspections

Report dates

Create a downloadable report with all activities within a 92 day range

From

Day Month Year

1

3

2023



To

Day Month Year

31

3

2023



Continue

“ In the performance reporting tile, you will also find a new report ‘sample inspections pass/fail rate’ to allow you to measure progress. ”

