

# **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

#### Download all my data

Export organisational data in a raw format

#### Performance Reporting

**Geographical areas** 

geographical areas.

Create and download data reports for specific activities

Manage and add your organisation's network of

#### Sample inspections

Set up organisations and generate sample inspections

#### <u>Fee Matrix</u>

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

Continue

#### Start typing and/or select promoter

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

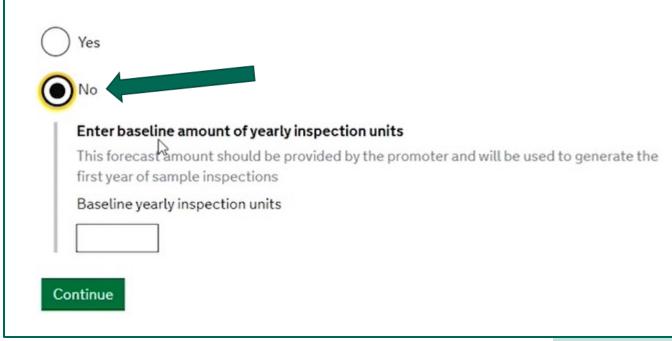
Smoke Test Promoter	
ALLERDALE BOROUGH COUNCIL	-
AMEY HIGHWAYS SOUTH EAST UNIT	
AMEY HIGHWAYS SOUTH WEST UNIT	
ANDOVER CABLE SERVICES	
ANGLIA CABLE	
ANGLIAN WATER	
AQ LTD	1
ARQIVA LTD	
BCM NORTH AND EAST	
BCM SOUTH	

# **C** To start, add a

promoter. In the 'select promoter' window, use the drop-down menu to find a promoter org. Then select 'continue' 55

Select promoter to generate sample inspections

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



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. 55

# last two financial years inspection units?



#### Enter and select the last two financial years inspection units

This will be used to calculate the average inspection units

#### 2021/22

07	0
11	0
s. 1	~

2020/21



) No

### Continue

# CC I

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

99

#### 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

Continue

You can only enter 30, or 50

%

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





**GG** You will now be able to enter the inspection start rate provided by the DfT. **55** 



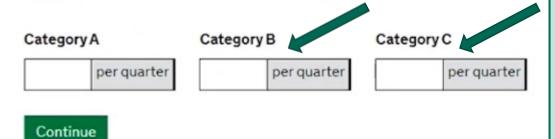
You will only be able to enter either 30% or 50% as the starting band. An error will appear if you try to enter another value.

# 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



# ßß

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

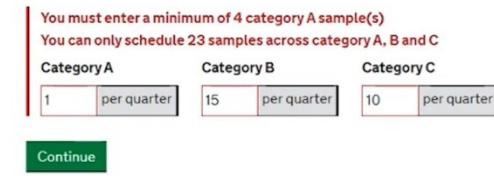
You can only schedule 23 samples across category A, B and C You must enter a minimum of 4 category A sample(s)

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 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**

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	

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

Department for Transport

Showing 1 - 4 of 4 results

**G** 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'.

# C: 0 C: 0 out of 8

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	<u>Update details</u>	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	<u>Update details</u>	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	Ca	
VIDEOTRON CORPORATION (HARROW)	300	30%	A: N/A B: 0	A: 0 out of 5 B: 0 out of 10	<u>Update details</u>	Archive promoter

Add and manage promoters sample inspections

List of promoter sample inspections

Promoter's details and samples have been set for GAMMATELECOM LTD

Generate samples

End quarter

er

er

ter

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

### List of promoter sample inspections

Add and manage promoters sample inspections

Back

Select promoter for sample inspections

Promot

# 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

Recommended during the last month of the quarter

Continue

Up to 100%

**G** G 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.

Options

Quarterly progress

Generate samples

End guarter

Applications and works View and manage applications an <u>View and manage Duration challe</u>	d works V		nalty notices (FPN) anage FPNs	
Inspections View and manage all inspections			ed reinstatements	R
Comments Review and respond to outstand	Scheduled and logged insp		Sample inspections due	G
	Filter options Search street name, town, a	irea		
	Search works reference Search USRN			
Department for Transport	Search promoter name Apply filters Clear filter	ers.		

C 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. 55



#### 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

S You will now see the inspections you have generated . 55

and manage promoters sample inspection ct promoter for sample inspections		units Insp	ection rate Quarterly sa	mples remaining	Quarterly pr	Grinerate samples End quarter
Yes, and quarter o, take me back						To end the quarter, select 'end quart 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 prom	noter details					
List of promoter sample Add and manage promoters sample inspections Select promoter for sample inspections						Start quarter
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	<u>Update details</u>	Archive.promoter
GAMMATELECOM 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	<u>Update details</u>	Archive promoter
			<b>A:</b> N/A	A: 0 out of 22		
Smoke Test Promoter	894	30%	B• 0	R* 0 out of 23	Undate 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

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	<u>Update details</u>	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	<u>Update details</u>	Archive promoter
Smoke Test Promoter			A . 51/6	A: 0 out of 22 B: 0 out of 23	Undate details	Archive promoter

## What is the start date of the quarter?

Enter the start date of the quarter

#### Quarter start date

Day Month Year

01	10	2022	
Cont	inue	G.	

**G** To start the next quarter select 'Start quarter' and enter the start date on the next screen. **55** 

Start quarter

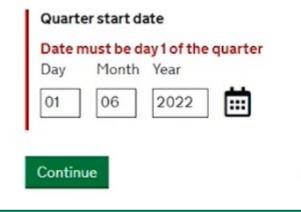
✓ Quarter started, you can now start generating samples	
List of promoter sample inspections	Generate samples
Add and manage promoters sample inspections	End quarter

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



You will then see a confirmation message confirming that the quarter has started. 55

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 a



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





### То

Continue

Day Month Year



In the performance reporting tile, you will also find a new report 'sample inspections pass/fail rate' to allow you to measure progress. 55