



# School Bus Inspection Tracking System User Manual

# **School Bus Inspection Tracking System User Manual**

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# Getting Started



## Application Basics

Welcome to the CVSE School Bus Inspection system. In this first section of the application users manual, we'll cover getting started with the application, the Home page and navigation basics. In this section we also cover how you can customize the application for your own use, and some things that you can't do - yet.

To log into the School Bus application, start your browser and go to  
<https://prdsm.th.gov.bc.ca/schoolbus/> Note the "/" at the end of the address - it's required!

If you are logged into your government workstation, you will be taken directly to the Home page of the application. If you are a non-government workstation, you will be prompted for your IDIR and password before being given access. Please note that to access the account, you must have BOTH an IDIR and an account on the School Bus system. Other Government employees with IDIRs cannot access this application.

### Home Screen

A screenshot of the CVSE School Bus Inspection Tracking System Home screen. The top navigation bar is dark blue with white text. From left to right, it includes the BC logo, the title "CVSE School Bus Inspection Tracking System", and a menu with "Home" (highlighted), "School Buses", "Owners", "Notifications", and "Administration". Below the menu is a user profile for "Stephen Curran Vancouver Island District". On the right side of the header is a large circular logo for the "BRITISH COLUMBIA VEHICLE INSPECTION PROGRAM" with a truck and cars. The main content area has a light gray background. It displays the user's name "Stephen Curran" and district "Vancouver Island District". Below this, there are three status messages: "You have 0 overdue inspections", "You have 1 re-inspections scheduled", and "You have 1 inspections coming due in the next month".

1

2

3

The screen above is the application Home screen. On first logging into the application and after clicking the "Home" menu item.



The area with the (1) near the top of the screen is the system menu. Click on those items to navigate to the different parts of the application - particularly the School Buses and the Owners.

**NOTE:** Only Administrators will see the "Administration" menu entry. Others will not see that option.

The area with the (2) at the top of the screen shows the current logged in user - e.g. you. If you don't see your name - please contact your System Administrator.

In the main body of the page will **may** see the 3 lines showing overdue, re-inspections and upcoming inspections. Only users that have been identified in the system as part of the "Inspectors" group will see those lines. Clicking the numbers in those phrases takes you to the School Bus Search>List screen with the relevant buses listed.

**NOTE:** If you are an Inspector and **do not see** the three lines, please contact your System Administrator to have your account updated to add you to the Inspectors group. Likewise, if you are NOT an inspector but DO see the lines, your account should be updated.

## Basic Navigation - Menus and Searching

A screenshot of the CVSE School Bus Inspection Tracking System. At the top, there's a navigation bar with links for Home, School Buses (which is highlighted in blue), Owners, Notifications, and Administration. To the right of the navigation is the user name "Stephen Curran Vancouver Island District". Below the navigation is a search bar with dropdown menus for Districts, Curran, Stephen, Miles, School Districts, Owner, Registration, and a checkbox for "Hide Inactive Just Re-Inspections". There are also buttons for Favourites and Search. The main content area shows a table of school bus details. The table has columns for Owner (Randy's Bus Fleet), District (Vancouver Island), Home Terminal (Victoria), Registration (09549221), Unit Number (1), Permit (39308), Next Inspection (May 1, 2017), Inspector (Stephen Curran), and Details. A small edit icon is next to the Details column. Four numbered circles point to specific elements: (1) points to the "Administration" link in the top menu; (2) points to the user name "Stephen Curran" in the top right; (3) points to the "Search" button; and (4) points to the "Details" link in the table row.

The screen above is like what you see when you first click the "School Bus" link in the top menu - although the list of school buses may be much longer. The following are some pointers about searching for information and navigating around the application. The numbers below correspond



to the numbers on the image above.

1. On an application search screen (School Buses and Owners) is the title of the screen and a number in parenthesis - the count of things returned by the search. In the screen above, there is one bus on the screen and the count is 1. So, if you want to get a count of some set of buses, you can see the search parameters (Step 3 - below) and the count will display.
2. The items in this section are the various search parameters you can set to find the exact sub-set of things (school buses, in this case) you want to see in a list. Depending on what options you select, you can list a single bus or every bus in the province. Later in this manual we'll cover the exact search parameters available for School Buses, Owners and (for System Admins), Users.
3. The "Search" button is what you click when you change the search parameters and are ready to search for the items meeting the new parameters. There will always be a default search executed when you get to a search screen, but if you change the criteria and want to search again, you have to click the "Search" button.
4. At the end of each line in the search results (below the search criteria) is an icon that lets you drill down to see the details of the item. In the image above, clicking that icon will allow you to see the details of the listed School Bus.

In the next section, we'll talk about Favourites - a mechanism you can use to create shortcuts to the searches you run most often - or that you want to appear first whenever you log into the app.



## User Preferences: Favourites

The screenshot shows the 'School Buses (2)' search results. At the top, there are several dropdown filters: Vancouver Island, Inspectors, Cities, School Districts, Owner, and Registration. Below these are three checkboxes: All, Hide Inactive (which is checked), and Just Re-Inspections. To the right of the filters is a 'Favourites' button. A callout bubble '1' is positioned over the search filters. A callout bubble '2' is positioned over the 'Favourites' button. On the right side of the results table, there is a message box stating 'No favourites'.

Owner	District	Home Terminal	Registration	Unit Number	Permit	Next Inspection	Owner
Randy's Bus Fleet	Vancouver Island	Victoria	09549221	1	39308	May 1, 2017 (R)	Stephen Curran
Randy's Bus Fleet	Vancouver Island	Victoria	09078985	2			Wade Barnes

Favourites let you tune the application to your specific needs. Instead of having to set the parameters you are interested in and then hitting the "Search" button each time you get to a search screen, you can create a Favourite of a search and jump straight to it.

To create a Favourite:

1. Set the Search parameters to what you want for your Favourite. For example, to see only the "Re-Inspections" you have coming up, select "All Districts", your name for "Inspectors", "All" for the "Next Inspection Date". and the checkbox "Just the Re-Inspections".
2. Click the "Favourites" button and then, in the drop down - "Favourite Current Selections".
3. You will be prompted for a name - whatever you want. For example "My Re-inspections". You can also set the search to be "Default" - see below on what that means.

To use a Favourite that you have created:

1. Click "Favourites" and you will see the name of the Favourite you created earlier.
2. Click on the name.

The search parameters will be changed to what was saved and the new search executed - just as



if you had done those steps manually.

If you set a Favourite to be the default. The default favourite is executed automatically, when you go to the search page on which it is defined - you don't even have to select the Favourite to have it run.

Note that the Favourites are different on each Search page. This means that you have a different set of Favourites for School Buses from those you have for Owners.



# School Buses and School Bus Owners



## School Buses and School Bus Inspection Tracking

### Searching for School Buses

A screenshot of the CVSE School Bus Inspection Tracking System. At the top, there's a navigation bar with the BC logo, the system name "CVSE School Bus Inspection Tracking System", and links for Home, School Buses (which is highlighted in blue), Owners, Notifications, and Administration. On the right of the navigation bar, it shows "Stephen Curran Vancouver Island District". Below the navigation is a search interface titled "School Buses (1)". It includes dropdown menus for Districts, Owner, Registration, and a "Favourites" button. There are also filters for "Within 30 Days", "Hide Inactive", and "Just Re-Inspections". The main area shows a table with one row of data. The columns are: Owner # (5), District (1), Home Terminal (2), Registration (4), Unit Number (6), Permit (7), Next Inspection (7), Inspector (7), and Details (7). The data row shows "Randy's Bus Fleet", "Vancouver Island", "Victoria", "09549221", "1", "39308", "May 1, 2017 (R)", "Stephen Curran", and a "Details" link.

When you first go to the School Buses screen (by clicking "School Buses" in the top menu), the following search is executed:

- District (1 in image) is set to your home District. **NOTE:** If the wrong District comes up, contact your System Admin to correct the District in your account.
- The Inspector (2) is set to you. **NOTE:** If you are **NOT** an inspector, the Inspector drop down is left showing "Inspectors", meaning - "All Inspectors".
- The Next Inspection Date Range (3) is set to "Within 30 Days" - meaning all Inspections in the past up through 30 days from today.

If you don't like those parameters as the initial School Bus search, follow the instructions in the previous section to create a "Default" Favourite, and that search will be used instead.

Note that once you have executed a School Bus search, and left the page, the Application will remember your search and run it again when you return to this page.



Some tips on setting the search parameters:

- If you select values from multiple drop downs, only buses matching ALL of the criteria will be returned. For example, if you pick both District and an Owner - only buses owned by that Owner and assigned in that District will be returned.
- When you enter a value in the "Registration" box (4), the rest of the parameters are ignored and all the School Buses in the system will be searched for that number. **NOTE: ONLY** the school buses already in the system will be searched - not ICBC.
- To search for other unique (key) values, click on the Registration drop down and you can choose to search by VIN or Plate Number. Again, the rest of the parameters will be ignored, just like for Registration searching.
- You currently must enter the **FULL** VIN for searching. This could be improved - let your System Admin know if you would like that feature added.
- Once you have selected some items for a drop down for searching (e.g. a District), you can remove that filter by clicking the "Select All" checkbox under that item twice. When you do that, no items will be selected, and no filtering will be done on that parameter.

Once you have executed a search, use the following links on the each School Bus listed to get more information:

- Click (5) the Owner of the Bus, to see the details of the Owner.
- Click (6) the Registration number or (7) the "Details" icon to see the details of the bus.



## Viewing School Buses

The screenshot shows the 'CVSE School Bus Inspection Tracking System' interface. At the top, there's a navigation bar with links for Home, School Buses (highlighted), Owners, Notifications, and Administration. A user profile for 'Stephen Curran Vancouver Island District' is shown on the right. Below the navigation, a banner indicates the bus is 'Verified Active' with a status of '28 days - May 2, 2017'. There are buttons for Notes (0), Attachments (0), and History (2). On the left, a section titled 'School Bus Data' (3) contains details like District (Vancouver Island), Inspector (Stephen Curran), Home Terminal (1012 Douglas Street), City, Province (Victoria, BC), Postal Code, Description (Parked upstairs in the United Nations room), Permit Class (Type 1: Yellow and Black School Bus), Body Description (Yellow and Black), Restrictions, School District (School District 62), Independent School (unchecked), Unit Number (1), Seating Capacity (14), and Mobile Aid Capacity (0). A pen icon (5) is located next to the 'School Bus Data' section. To the right, an 'Inspection History' section (6) lists four inspections with columns for Date, Type, Status, and Inspector. The first inspection is 'Failed' (Status: Failed, Inspector: Stephen Curran, Date: Apr 4, 2017). The other three are 'Passed' (Status: Passed, Inspector: Randy Posnick, Dates: Mar 16, 2017; Mar 9, 2017; Mar 2, 2017). Below the 'School Bus Data' section, a 'Policy' section (4) displays Policy # (C00654), Effective Date (Nov 2, 2008), Status Date (Nov 2, 2008), Expiry Date (Nov 1, 2009), Status (2 - TERM+UNATCHD), and Plate Decal # (94000361).

When you click a link from the School Bus Search screen to go into the details of the School Bus, you can see all the information we have in the system about the Bus. The information is in sections:

- Top left (1) is the status of the School Bus - active or archived. To archive a bus because it has been sold or removed from service, click the edit button (see instructions below).
- Beside the status is the next inspection date. The date is GREEN if it is in the future, YELLOW if it is in the future and a Re-Inspection, and RED if the inspection is overdue.
- The "Notes" and "Attachments" buttons are not yet active, but the "History" (2) button will show you a History of the events that have occurred related to this School Bus (e.g. Added, Data Edited, Inspected, etc.)
- The "School Bus Data" section (3) contains all of the information about the School Bus that is maintained in this system.
- Below the "School Bus Data" (4) is data from ICBC and NSC. More about that information in the next section of this User Manual.
- The pen icon (5) in the "School Bus Data Section" allows you to update all of the information we are tracking about the bus. That is described in more detail below.
- Finally, the "Inspection History" section contains a list of inspections recorded in this system. More on Inspections later in this section.



## ICBC and NSC Data Handling

The screenshot shows a web application interface for school bus inspection tracking. At the top, there's a header with the British Columbia logo and the title "CVSE School Bus Inspection Tracking System". Below the header, a navigation bar includes links for Home, School Buses, Owners, Notifications, Administration, and a user profile for Stephen Curran from Vancouver Island District.

The main content area is divided into several sections:

- Policy:** Displays policy details: Policy # C00654, Effective Date Nov 2, 2008, Status Date Nov 2, 2008, Expiry Date Nov 1, 2009, Status 2 - TERM+UNATCHD, and Plate Decal # 94000361.
- ICBC Registered Owner:** Shows owner information: RUDICKTEST SACHIKO, Address 1801 BURRARD ST, M/A 838-8372 GREAT NORTHERN, RESIDENTIAL TOWERING TOWERS ARMSTRONG BC V0E1B5, and status information: RODL # 0000000, PODL #.
- NSC:** Shows NSC details: NSC #, Carrier Name, Carrier Conditions, and Carrier Safety Rating.
- ICBC Vehicle Data:** Displays vehicle specifications: Year 1984, Vehicle Type 3 - MTCYCLE, Rate Class 313, CVIP Decal EF56465, Fleet Unit #, GVW 0, Make SUZUKI, Body MC, Rebuilt Status, CVIP Expiry Apr 30, 2013, Net Wt 0, Model, Fuel BUTANE, Seating Capacity 0, N&O, Colour RED, and Ordered On.

At the bottom right of the page, a message indicates the data was last fetched on April 4, 2017 at 9:58:35 AM. There are two circular numbered callouts: (1) points to the "Working" indicator in the top right, and (2) points to the fetch date/time message at the bottom right.

Everything below the "School Bus Data" and "Inspections" areas is data that is pulled from ICBC and NSC via the CCW Web Services - the same services that drive the CTSWeb application. When you first open a School Bus Details page, the School Bus application immediately displays the most recent version of the data it has available - which may **NOT** be today's data. At the same time, the application is calling the CCW Services, and assuming they are available, the screen will automatically update with the latest data in about 3 or 4 seconds. If you are concerned with the latest info from ICBC/NSC, wait for that update.

There are two things you can check on the progress.

1. In the top right (1) you will see a "Working" indicator while the data is being fetched from ICBC/NSC. If something goes wrong (e.g. CCW is offline), the "Working" will be replaced with "Error". In that case, you will just have to use the data from the last time we pulled data from those sources.
2. In the bottom right (2) you will see the date/time the data being displayed was pulled. That's where you can see if everything is up to date.

**NOTE:** In the current iteration, the Out of Province school buses in the system do NOT get data



from ICBC/NSC. For those buses, the "Error" message will always show, and the data fields will be empty. You'll need to go to another source, such as CTMSWeb to get information on those buses. We hope to enhance the system over time to properly handle out of province buses.

## Editing School Bus Information

A screenshot of a web-based application for editing school bus information. At the top, it displays the vehicle details: "School Bus Registration: 09549221 Plate: C00654 VIN: JS1GU71A9E2101446". Below this, there are several input fields grouped into sections: "Status" (Active), "Owner" (Randy's Bus Fleet), "District" (Vancouver Island), and "Inspector" (Curran, Stephen). The next section contains "Home Terminal Address 1" (1012 Douglas Street) and "Address 2" (empty). To the right are "City" (Victoria), "Province" (BC), and "Postal Code" (empty). A "Home Terminal Description" field contains the text "Parked upstairs in the United Nations room." In the middle left, there's a "Permit Class" dropdown set to "Type 1: Yellow and Black School Bus". To its right is a "Restrictions" field, which is greyed out and has a pencil icon in the top right corner, circled with the number 1. Below these are "Body Description" (Yellow and Black) and "School District \*" (SD 62). The "Independent School" section includes a "Yes" or "No" radio button, with "No" selected, and an empty "Independent School Name" field. The "Unit Number" is 1, "Seating Capacity \*" is 14, and "Mobility Aid Capacity \*" is 0. At the bottom right are "Close" and "Save" buttons. Callouts with numbers 1 and 2 point to the pencil icon in the restrictions field and the "Independent School" section respectively.

School Bus Registration: 09549221 Plate: C00654 VIN: JS1GU71A9E2101446

Status: Active Owner: Randy's Bus Fleet District: Vancouver Island Inspector: Curran, Stephen

Home Terminal Address 1: 1012 Douglas Street Address 2: City: Victoria Province: BC Postal Code:

Home Terminal Description: Parked upstairs in the United Nations room.

Permit Class: Type 1: Yellow and Black School Bus

Restrictions: (Greyed out, circled with 1)

Body Description: Yellow and Black

School District \*: SD 62 Independent School: (Yes/No, No selected)

Unit Number: 1 Seating Capacity \*: 14 Mobility Aid Capacity \*: 0

Close Save

As noted, clicking the pencil icon in the "School Bus Data" area allows you to edit the information maintained about the school bus. When clicked, the popup above appears, and you can edit the data. Most of the edits are self-explanatory, but a couple are worth mentioning.

- The "Restrictions" field is automatically updated when the "Permit Class" value is selected - hence it is greyed out. In the rare circumstance that a custom restriction is needed, click the pencil icon (1) top right of the restriction field, and the field will be opened for editing. **NOTE:** If



you update the Permit Class after you edit the Restrictions field, the Restrictions will be reset to the default for that Permit Class - and your edits will be removed.

- The "Independent School Name" field is only editable if the "Independent School" field is "True". Either way, the School District field should be filled in.
- **NOTE:** When editing, you can change the "Owner" field. We'll talk more about what that means in the "Owner" section below, but do be careful in changing that.
- Likewise, the "Inspector" field, as that will reassign the School Bus to that Inspector.

## Managing Inspections

Inspection History				
Date ↓	Type	Status	Inspector	
Apr 4, 2017	Annual	Failed	Stephen Curran	<span>(1)</span>
Mar 16, 2017	Annual	Passed	Randy Posynick	<span>(2)</span>
Mar 9, 2017	Annual	Passed	Geoff Ford	<span>(3)</span>
Mar 2, 2017	Annual	Passed	Randy Posynick	

The inspection history area lists all of the inspections recorded in the system on the selected School Bus. Note that inspections performed before the launch of this system (March, 2017) are not recorded in the system. They are available in the VIP system.

To add an inspection, click the Add button (1). Adding/editing details are defined in the next step.

For a brief period of time after an inspection is created (24 hours), an Inspection can be edited or deleted. These features are to handle mistakes/typos made in the system - for example, adding an inspection to the wrong bus. Click the garbage can or pencil icons (2) for an inspection to perform those activities.

To view an inspection, hit the view icon (3) you've seen on other screens.



## Adding, Editing and Viewing Inspections

### Inspection

Date \*  (1)

Inspector \*  (1)

Result \*  (1)

Next Inspection Date \*  (2)

Comments

RIP Inspection ID

Clicking Add, Edit or View for an Inspection brings up the popup above. On Adding, the Date will be defaulted to today, and the Inspector to you (if you are an Inspector). On Adding and Editing, any of the fields can be changed when adding or editing, with certain fields required.

Note that in this system, we are only tracking that the inspection occurred and its overall status - not the details. The details remain in the Inspection System - currently RIP.

The Result (1) may be one of "Passed", "Failed" or "Out of Service". The Next Inspection Date (2) is set based on the Result - a year from now if Passed, 30 days if Failed. You can adjust (within reason) those dates. A selection of Out of Service does not change the Next Inspection Date, but it still must be entered.

The RIP Inspection ID is optional and serves (for now) only as a reference. In the future, we hope to add a mechanism so that given the RIP ID, we can open the Inspection PDF from within the School Bus system.



## Handling School Bus Owners

This section of the User Manual is about School Bus Owners. It's important to understand the term "Owner" as it is used in this application. In School Bus, an "Owner" is just a way to define a collection of buses - nothing more. An "Owner" in the system is not necessarily the same Owner as is officially defined in ICBC (which could be a variety of players - leasing companies, etc), nor the client in NSC. It can be, but it doesn't have to be. In this application, the Owner is the party that the Inspector works with in Inspecting the vehicle and receives the permit. Nothing more than that.

### Listing/Search for and Adding School Bus Owners

A screenshot of the CVSE School Bus Inspection Tracking System. The top navigation bar includes the British Columbia logo, the system name "CVSE School Bus Inspection Tracking System", and menu items for Home, School Buses, Owners (which is selected and highlighted in blue), Notifications, and Administration. A user profile for "Stephen Curran Vancouver Island District" is also visible. Below the header, the main content area shows a title "Owners (4)" with a message count of 0. There are several search filters: "Districts" dropdown, "Curran, Stephen" dropdown, "Owner" dropdown, a checked checkbox for "Hide Inactive", a "Search" button, and a "Favourites" dropdown. To the right of the search filters are two small icons for email and print.

Searching and Listing School Bus Owners works the same way as searching and listing School Bus - specify the search parameters and click the "Search" button (1). As with School Bus, there is a default search run when you first hit the screen:

- Owners that are Active AND
- In the District to which you are assigned AND
- For which you are the Inspector on one or more buses (this part is left off if you are not an inspector).

As with the School Bus search, you can create your own Favourites and have a default Favourite that is run instead of those search parameters.



## Listing/Search for and Adding School Bus Owners

Name	Primary Contact	School Buses	Next Inspection	
Gamma Gas		5	Mar 22, 2018	
J. Brannan		1		
Lionel Playworld	Ty Coats	3	Dec 22, 2017	
School District 61	Rita Ison	3	Jan 1, 2018	

From the search list results, you can see the number of buses associated with the School Bus Owner (1) - and click on it to get a list of those buses, and you can drill into the Owner details screen (2).

Also from this screen you can click the "Add Owner" button (3) to add a new owner to the system. Clicking that link will display a dialog to collect basic information about the new Owner and then take you to the Owner details screen.

## Viewing/Editing Owner Details

The screenshot shows the 'CVSE School Bus Inspection Tracking System' interface. At the top, there's a navigation bar with links for Home, School Buses, Owners, Notifications, Administration, and a user profile for Stephen Curran (Vancouver Island District). Below the navigation is a toolbar with buttons for Verified Active (green), 352 days – March 22, 2018, History, Print, and Return to List.

The main content area displays the details for a School Bus Owner named Gamma Gas. A large circular callout (1) points to the owner's name. To the right of the name is an edit icon. Below the name, there's a section for 'School Bus Data' (2) which includes the number of school buses (5), owner added date (Feb 7, 2010), next inspection date (Mar 22, 2018), and main contact information. There's also a '+ Add School Bus' button. To the right of the bus data is a 'Comment Log' section (3) with a message stating 'No comments'. At the bottom left is a 'Contacts' section (4) with a message 'No contacts' and a '+' button.

Clicking to drill into a School Bus Owner details enables a few things you can see or do.

1. There isn't much to edit with a School Bus owner, but if you want to change the status (for



- example, to archive a no longer operating Owner) or the Name of the Owner, click the pencil icon (1) near the Owner name.
2. The most important thing you are likely to do on this screen is add a new School Bus. Click the Add button (2) to do that.
  3. The Comment Log (3) and Contacts (4) sections are more "Coming Soon" features. They are to allow adding notes/reminders about the Owner, and for adding Contacts related to the Owner.

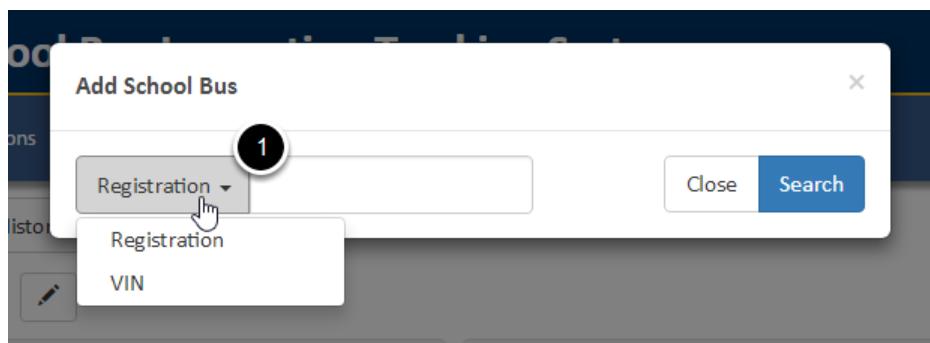
Note that on this screen there is no assigned Inspector, School District, District, etc. All of those data elements are attributes of individual school buses. An owner is associated with those entities only through the buses they "own". For example, a large company that has buses in multiple Districts inspected by multiple Inspectors will be found when searching by those Districts and/or Inspectors.



## Adding/Permitting School Buses

In the previous section, the Owner Detail screen was reviewed. From that screen, the "Add School Bus" button is available. What happens next?

### Adding a School Bus



After clicking "Add School Bus", the popup above is presented. Enter the Registration Number for the School Bus, or click on the arrow beside Registration (1), choose VIN and enter the full VIN. Click search.

The School Bus application will do the following:

- Check the local School Bus database. If the Registration Number/VIN is already in the database, a link will be displayed to allow you to jump to that bus (or cancel and try a different value)
- Connect to the CCW Web Services and search for the School Bus. If not found - a Not Found message is displayed
- Display the data received via CCW and allow the Inspector to confirm (or not) that the correct Bus has been found
- Create the School Bus record and go to the School Bus details screen for the newly added School Bus



## Permitting a School Bus

A screenshot of a computer interface for a vehicle inspection system. At the top, it says "Stephen Current Vancouver". Below that are two large circular buttons labeled "1" and "2". Between them is the text "A9E2101446 Permit: 39308 Print Permit (Issued: Mar 6, 2017)". To the left of button 1 is a "History" button. To the right of button 2 are icons for a printer and a back arrow. Below the main area are two buttons: one with a pencil icon and another labeled "Inspection History".

Once a School Bus has been added to the system it does not have a Permit number until the Inspector is satisfied that the School Bus can be issued, Until that time, where the "Permit" label (1) is displayed a "Generate Permit" button is displayed. When clicked, the permit number for the bus is generated and the permit issued date is recorded. At that time, the permit can be viewed and printed by clicking the "Print Permit" (2) button. A PDF of the print is generated and can be printed and provided to the School Bus owner.



# Notes on the School Bus Application



## Notes about the School Bus Application

In this section of the application, we cover some notes about the application of interest to the users.

### Moving, Archiving and Activating School Buses

#### Moving a School Bus

Moving a School Bus can generally be done within the system. Editing a School Bus allows you to change the location (School District, District, Independent School), the Owner and the Inspector of a School Bus. This is preferred because it ensures that the history of the School Bus in the system is retained. Currently, if the School Bus Plate is changed, the change is **NOT** picked up in the system. If this happens, notify the System Administrator. At the time of writing, bad data from the old system has resulted in about 20 buses having the wrong Plate Number, and a correction to the data is in the works.

#### Archiving/Activating a School Bus

A School Bus that is removed from service can be Archived in the system. Do this if the Bus is at "End of Service". If the bus is sold to another Owner, the School Bus should be moved (see notes above) rather than archived.

If an Archived Bus is subsequently sold and reactivated, the best practice is to edit the bus, change its status to "Active" and move the School Bus by changing the appropriate fields on the School Bus details screen (see notes above).

### History, Contacts and Notifications

A screenshot of the CVSE School Bus Inspection Tracking System. The interface is a web-based application with a dark blue header bar. The header includes the BC logo, the text "CVSE School Bus Inspection Tracking S", and navigation links for "Home", "School Buses", "Owners", "Notifications", and "Administrations". Below the header, there's a green button for "Verified Active" and a message "28 days - May 2, 2017". A red circle with the number "1" is overlaid on the "History" link. The main content area shows a "School Bus Owner: Randy's Bus" and "Registration: 09549221 Plate: 1654 VIN: JS1GU71A9E2101446 Per". At the bottom, there are buttons for "School Bus Data", "Edit", and "Delete".

#### History

On both the School Bus and the Owner details screen is a "History" section (1). The "History"



section records the events related to those things - adding an Owner, adding a School bus, inspecting a School Bus and so on - including the date/time of the event and the user that triggered the event.

## **Contacts**

In the data conversion from AVIS to School Bus, the one Owner Contact was copied into the new system. However, the ability to view/add/edit contacts was not implemented. This functionality will be added as part of phase 2 for School Bus enhancements.

## **Notifications**

The plan for notifications is to have the system periodically check information from CCW Services about each School Bus, and to proactively notify the School Bus Inspector when something changes. For example, if a School Bus changes ownership in ICBC - the Inspector will get a notification letting them know. That would allow the Inspector decide if they need to take any action about such a change.



# Administration



## Application Administration - Managing Users and Roles

### Managing Users

Surname	First Name	User ID	District
Barnes	Wade	WABARNES	Vancouver Island
Bellville	Gary	GXBELLEV	Vancouver Island
Chamberlin	Robert	ROCHAMBE	Cariboo
Clark	Ken	KACLARK	Vancouver Island
Curran	Stephen	SCURRAN	Vancouver Island
Di	Simon	SDI	Vancouver Island
Fisher	Dorothy	200029	Vancouver Island
Ford	Geoff	GEFORD	Vancouver Island
Fritz	Debbie	DFRITZ	Vancouver Island
Gaffney	David	DXGAFFNE	Vancouver Island
Graham	Ralph	200036	Vancouver Island
Greene	Margaret	200037	Vancouver Island
Hanson	Emory	200023	Vancouver Island
Hayes	Graham	GHAYES	Vancouver Island

Administrators of the system can see and click the "Administration" menu item (1) and then "User Management" to get a list of users. From there, they can see all users (by default) or search by District and Surname (2). If necessary, search "Favourites" (3) can be created in the same way they are on the School Bus and Owner List/Search screens.

On the left side, Administrators can delete or view User details (4). NOTE: The delete option should be removed, and should be avoided. Instead, mark the user as "Inactive" on the User Details/Edit screen.

New users can be added to the system by clicking the "Add User" button (5).



## Adding Users

A screenshot of the CVSE School Bus Inspection Tracking System's user management interface. At the top, there is a navigation bar with links for Home, School Buses, Owners, Notifications, Administration, and a user dropdown for Stephen Curran from Vancouver Island District. Below the navigation bar, a green button indicates the user is "Verified Active". On the left, a sidebar shows the user "Wade Barnes". The main content area displays two sections: "General" and "Access".

**General**

Given Name	Wade
Surname	Barnes
User ID	WABARNES
District	Vancouver Island
E-mail	[redacted]
Groups	Inspector

**Access**

Role	Effective Date	Expiry Date	Actions
User	February 28, 2017		<input type="checkbox"/> Add Role <input type="checkbox"/> Expire
Administrator	February 28, 2017		<input type="checkbox"/> Expire

When you add a user, you will need to enter the information about the user into the system. Most of the information is obvious, name, etc., but the User ID is required to be EXACTLY the users IDIR. If the User ID is not correct, the user will not be able to log into the application.

For Group, select the most appropriate for the user you are adding. If the user is an Inspector, it is crucial that you select that or the user will not appear in the lists of Inspectors for searching or assignments.

You **MUST** assign the user at least one role in the system in the Access section, or the user will not be able to access the system. In most cases, just the "User" role will be added. Only if the user will be an administrator (able to add/remove users), you must also add the "Administrator" role. Over time, additional roles may be added or removed, and those other roles may be added as appropriate for users.



## Editing/Removing Users

A screenshot of the CVSE School Bus Inspection Tracking System. At the top, there's a navigation bar with the BC logo, the system name "CVSE School Bus Inspection Tracking System", and links for Home, School Buses, Owners, Notifications, Administration, and a user profile for Stephen Curran from Vancouver Island District. Below the navigation is a green button labeled "Verified Active". On the right, there are icons for printing and returning to the list. The main content area shows a user profile for Wade Barnes. Under the "General" tab, details include Given Name: Wade, Surname: Barnes, User ID: WABARNES, District: Vancouver Island, E-mail: (hidden), and Groups: Inspector. A pencil icon with the number 1 is circled in black. In the "Access" section, there are two rows: one for "User" with Effective Date: February 28, 2017, and another for "Administrator" with the same date. To the right of the "Access" table are buttons for "Add Role", "Expire", and "Unexpire". A circled number 2 is over the "Expire" button.

When view the User Details screen, you may edit the user by clicking the pencil icon (1).

To remove access to the system, you should do the following:

- Edit the user information and mark their status as "Inactive"
- Edit each role they have in the "Access" section (2) and expire the role - set the expiration date to today.

These steps will ensure the user no longer has access to the system.

**NOTE:** If the user's IDIR is deactivated, the user will no longer have access to the system, regardless of the settings here.



## Managing Roles

A screenshot of the CVSE School Bus Inspection Tracking System interface. At the top, there's a header bar with the BC logo and the title "CVSE School Bus Inspection Tracking System". Below the header, a navigation menu includes "Home", "School Buses", "Owners", "Notifications", and "Administration". On the right side of the header, it shows "Stephen Curran Vancouver Island District". The main content area is titled "Roles (4)". It contains a search bar labeled "Name" and a table with four rows of role information. The table has columns for "Name" and "Description". To the right of the table are several icons: a plus sign for adding a role, and four circular icons numbered 1 through 4, each with a different symbol (envelope, printer, magnifying glass, etc.).

Name	Description	
Administrator	System Administrator; full access to the whole system.	
Manager	A role for an AVI Manager	
User	A regular user in the system.	
test	test	

Roles in the system control the level of access the user in the system has. Roles are made up of permissions, and the permissions are referenced in the application code to control what a user can see and do in the system. At log in time, the system figures out the list of roles the user has (see the "Access" section of the User Details screen - above) and sums up the permissions each of those roles have, and those are the permissions given to the user.

In the School Bus system, there are currently only two active permissions in the system, so there are correspondingly only two useful roles in the system. The active permissions are:

- Login - without this permission, the user cannot log into the application.
- Admin - this permission gives the user access to the capabilities of the "Administration" menu items and some other capabilities in the system that only privileged users are permitted to do.

With such limited controls, the Managing Roles section is not very useful, but this section of the Manual covers the basics, should more permissions be added to the system.

Roles are listed on entry to the screen and you can search on roles. Once listed, click the View



icon (1) to the left of the role to see the details of the role.

To add a new role, click the "Add Role" button (2).

### Adding/Editing Roles

CVSE School Bus Inspection Tracking System

Stephen Curran Vancouver Island District

Role: User

Name *	1	Description *	2
User		A regular user in the system.	

Permissions

Name	Description
Admin	Allows the user to perform special administrative tasks.
Assign Inspectors	A user granted this permission will be able to assign inspectors.
Login	Permission to login to the application
Receive Notifications	Enables the user to receive notifications intended for the user's group.
Roles and Permissions	Gives the user access to the Roles and Permissions screens
User Management	Gives the user access to the User Management screens

**Save**

Once adding/editing a role, give the role a unique name (1) and a description (2). The description should be such that when an administrator is thinking of adding the role to the a user account, they can understand the impact of the addition on what the user will be able to do.

From there, select (highlight) the permissions (3) that the role should include. As can be seen above, there 6 permissions listed in the application, but only 2 have an impact on system behaviour - "Login" and "Admin". The others were anticipated to be needed when the system was created, but were not implemented.

Once the appropriate selections have been made, click Save.

Note when building roles, there are two tactics to take:

- Create a role that will be given to a number of people that have the same job function - e.g. Inspectors, Managers, etc. The role should have all the core permissions needed by users in



that Job Function.

- Create a role with just a permission or two that can be used to extend the capabilities of a person in a job function that has been assigned an extra responsibility. For example, an Inspector that is also expected to do some extra District-wide reporting.

Each user is then given a "Job Function" role, and only a few with extra responsibilities are given the second role. This makes it easier to manage the roles - you don't have to have full roles (many permissions) for each variation on a Job Function.