

Ridewise Manual
TRANSPORT OPERATORS

Version: 3.2

20 March 2017

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System Access/User Management

Log In

1. Access Ridewise at <https://ridewise.nzttl.govt.nz/>
2. Enter your Username and Password and click Logon

The screenshot shows the login interface for the Total Mobility Scheme. At the top left is the ridewise logo with the tagline 'TOTAL MOBILITY. TOTALLY MANAGED'. At the top right is a '[Log On]' link and the version number 'v 1.0.0'. The main heading is 'Total Mobility Scheme'. Below this is a 'Log On' button. The login form contains three input fields: 'Username*', 'Password*', and a link for 'Forgotten Password'. Below the form is a 'Logon' button. At the bottom left, contact information for Eyede NZ Ltd is provided: 'PO Box 31012, Lower Hutt 5012, +64 4 939 8764'. At the bottom right is the ridewise logo and tagline.

Request New Password

1. Access Ridewise at [https://ridewise.nzttl.govt.nz /](https://ridewise.nzttl.govt.nz/)
2. Click [Forgotten Password](#)
3. Enter your Username
4. Click Submit

ridewise
TOTAL MOBILITY. TOTALLY MANAGED

[Log On]
v 1.0.0

Total Mobility Scheme

Forgotten Password

You have requested a change of password.
Please re-enter your Username and click Submit. Your new password will be emailed to you shortly.

Username*

Submit Cancel

Eyede NZ Ltd
PO Box 31012
Lower Hutt 5012
+64 4 939 8764

ridewise
TOTAL MOBILITY. TOTALLY MANAGED

Change Password

1. Click the "Change Password" action link
2. Fill in the fields required ensuring that the new password contains 6 or more characters and at least one number
3. Click Change Password

The screenshot shows the 'Total Mobility Scheme' interface. At the top, it says 'Welcome GWRCPhil Environment. Ridewise Role: Council Administrator'. The main navigation bar includes 'Home', 'Clients', 'Agencies', 'Transport Operators', 'Transactions', 'User Management', 'Reports', and 'Settings'. Below this, there are links for 'Find Users', 'Create Council User', 'Create Agency User', and 'Create Transport Operator User'. The 'User Details' section for 'DYER Phil' is active, showing his status as 'Active' and various details: Phone Number, Role (Council TM Coordinator), Designation (Eyede Staff), Email (phil.dyer@eyede.co.nz), and Username (coordphil). A 'User History' table shows a single entry: '4/03/2011 2:58:36 p.m. gwrcphil User Created'. A sidebar on the left offers actions like 'Edit this user', 'Suspend this user', 'Change password', and 'Add user note'. The page footer indicates 'Last Modified by GWRCPhil Dyer on 4/03/2011 2:58:36 p.m.'

Change Password

Users are required to change your password when logging on for the first time.

Please enter your existing password and then your new password and confirmation.

Passwords must be at least 6 characters in length, must be alpha-numeric and must contain at least one number.

Current password*

New password*

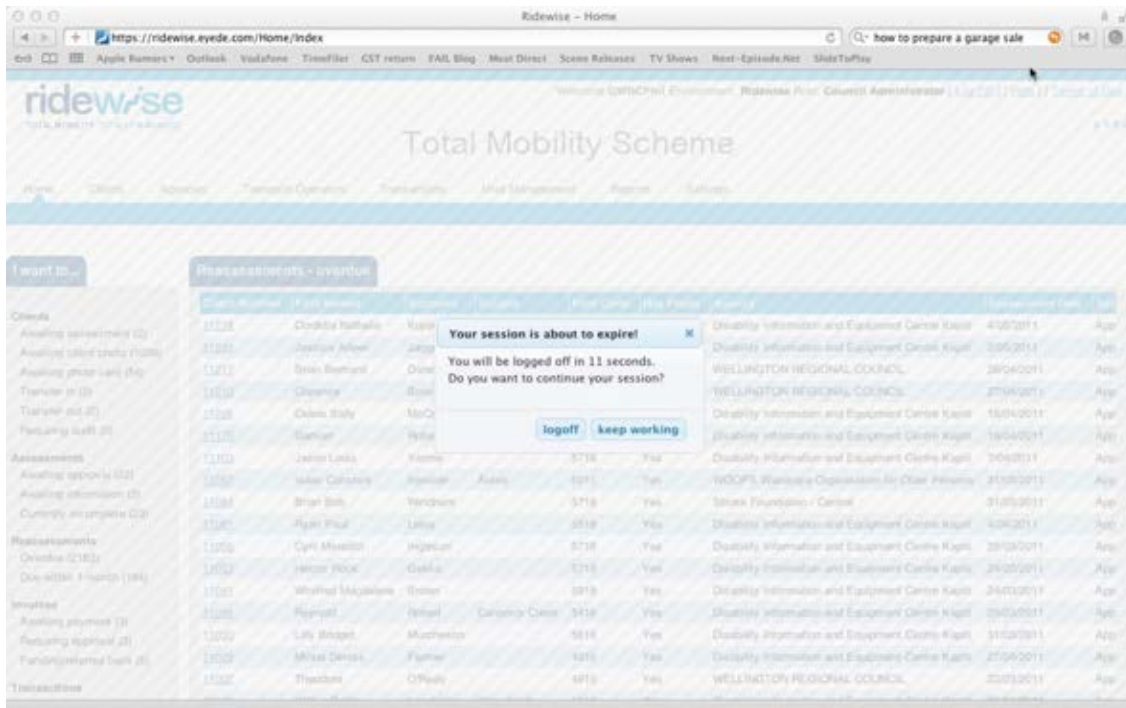
Confirm new password*

Acceptance of Terms of Use
By accessing this website and logging-on to your Ridewise account, you acknowledge that you have read, understand and accept the [Terms of Use](#). If you do not understand or accept these Terms of Use, which you are required to comply with, you should immediately exit this website

Personal Information
By accessing this website and logging-on to your Ridewise account, you also acknowledge that you have read, understand and accept, the Privacy Statement contained in the [Terms of Use](#). The Privacy Statement is an integral part of the Terms of Use that, by accessing this website, you are deemed to have acknowledged that you have read, understood and accepted.

Time out

1. After 20 minutes of inactivity, Ridewise displays a warning indicating that the user will be logged off in 30 seconds, and commences a 30 second countdown
2. If no action is taken, user is logged off after 30 seconds



Create a User

1. Click the “User Management” tab
2. Click the “Create Transport Operator User”
3. Fill in the fields as required
4. Click Save

The screenshot shows the 'Create a New Account' form in the Ridewise system. The form is titled 'Create a New Account' and includes the following sections:

- Role Details:** A dropdown menu for 'Role' is set to 'Transport Operator', and another dropdown for 'Transport Operator' is set to 'Airport Shuttles (DunedIn)'.
- User Details:** Fields for 'First Names*', 'Surname*', 'Contact Phone Number*', 'Designation', and 'Email Address*'. 'First Names*' and 'Surname*' are stacked vertically. 'Designation' and 'Email Address*' are stacked vertically.
- Authentication Details:** A field for 'Username*'.

At the bottom right of the form, there are 'Save' and 'Cancel' buttons. The page header shows the user is logged in as 'Transport Operator Administrator'.

Common Functionality

This section contains functionality that is common across Ridewise entities. The primary entities within Ridewise are Client, Agency, Transport Operator, and System User. Functionality specific to these entities is documented in later sections.

Find a Record

1. Click tab for the desired entity type (Driver, Vehicle, or Transaction)
2. Enter the default search item or click “*more search options*” and enter required search criteria*
3. Click Find

The screenshot displays the Ridewise web application interface. At the top, the Ridewise logo and tagline 'TOTAL MOBILITY. TOTALLY MANAGED' are visible on the left, and the Eyede NZ logo is on the right. A user welcome message reads: 'Welcome Phil Environment: Development Role: Transport Operator Administrator [Log Off] [Help] [Terms of Use]'. The version number 'v 3.0.17067' is also present.

The navigation menu includes: Home, Transport Operators, Transactions, User Management, Reports, Find Transport Operators, Find Drivers, Find Vehicles, Create Driver, and Create Vehicle.

The main content area features a 'Search' section on the left with a 'Surname' input field, 'more search options', 'reset search', and a 'Find' button. Below this is an 'I want to...' section with an 'Export this view' button.

The 'Search Results' section displays a table with the following data:

Driver #	Transport Operator	Surname	Firstname	Driver Status	Driver Training
QTAG01	Airport Shuttles (Dunedin)	Test	Test	Active	

Below the table are navigation links: 'First', 'Previous', '1', 'Next', 'Last'. On the right side of the results, it says 'Showing 1 to 1 of 1 entries' and 'Show 20 entries'.

The footer contains contact information for Eyede Solutions: 'PO Box 31012, Lower Hutt 9012' and the Ridewise logo with tagline.

View a Record

1. Click on the [hyperlink](#) in the first column of the Record you wish to view

The screenshot shows the Ridewise web application interface. At the top, there is a navigation bar with the Ridewise logo and the tagline 'TOTAL MOBILITY. TOTALLY MANAGED'. The user is logged in as 'Development Role: Transport Operator Administrator'. Below the navigation bar, there are several menu items: 'Home', 'Transport Operators', 'Transactions', 'User Management', and 'Reports'. A secondary navigation bar contains links for 'Find Transport Operators', 'Find Drivers', 'Find Vehicles', 'Create Driver', and 'Create Vehicle'. The main content area features a search form on the left with a 'Surname' input field and a 'Find' button. To the right, the search results are displayed in a table. The table has columns for 'Driver #', 'Transport Operator', 'Surname', 'Firstname', 'Driver Status', and 'Driver Training'. A single record is shown with 'Driver #' 'QTACQ1' circled in red, 'Transport Operator' 'Airport Shuttles (Dunedin)', 'Surname' 'Test', 'Firstname' 'Test', and 'Driver Status' 'Active'. Below the table, there are pagination controls: 'First', 'Previous', '1', 'Next', 'Last'. On the right side of the table, it says 'Showing 1 to 1 of 1 entries' and 'Show 20 entries'. At the bottom left, there is a footer with contact information for Eyede Solutions. At the bottom right, there is another Ridewise logo and tagline.

Driver #	Transport Operator	Surname	Firstname	Driver Status	Driver Training
QTACQ1	Airport Shuttles (Dunedin)	Test	Test	Active	

Create an Entity (Driver/Vehicle)

1. Click the desired entity tab
2. Click the “Create (entity type)” link
3. Fill in the fields as required
4. Click Save

The screenshot shows the Ridewise web application interface. At the top, there is a navigation bar with the Ridewise logo and the tagline 'TOTAL MOBILITY. TOTALLY MANAGED'. The user is logged in as 'Phil Environment' with the role 'Transport Operator Administrator'. The navigation menu includes 'Home', 'Transport Operators', 'Transactions', 'User Management', and 'Reports'. Below this, there are links for 'Find Transport Operators', 'Find Drivers', 'Find Vehicles', 'Create Driver' (highlighted with a red circle), and 'Create Vehicle'. On the left, there is a search box for 'Surname' and a 'Find' button. The search results table shows one entry for a driver with ID 'OTAG01', name 'Airport Shuttles (Dunedin)', and status 'Active'. The footer contains contact information for Eyede Solutions and the Ridewise logo.

Welcome Phil Environment. Development Role: Transport Operator Administrator [Log Off] [Help] [Terms of Use]
v 3.0.17067

Home Transport Operators Transactions User Management Reports
Find Transport Operators Find Drivers Find Vehicles **Create Driver** Create Vehicle

Search
Surname
more search options
reset search Find

Search Results
Results for search [Shows all driver views]

Driver #	Transport Operator	Surname	Firstname	Driver Status	Driver Training
OTAG01	Airport Shuttles (Dunedin)	Test	Test	Active	

Showing 1 to 1 of 1 entries
Show 20 entries

I want to...
Export this view

Eyede Solutions
PO Box 31012
Lower Hutt 5012

ridewise
TOTAL MOBILITY. TOTALLY MANAGED

Home | Transport Operators | Transactions | User Management | Reports

Find Transport Operators | Find Drivers | Find Vehicles | **Create Driver** | Create Vehicle

I want to...
Upload driver details

Create Driver

Surname*
First Names*

Transport Operator
Driver Number* ⁽¹⁾
Driver Training

Next Training Date Due

Airport Shuttles (Dunedin)

- NZQA 1748
- NZQA 15185
- NZQA 1734
- NZQA 1750
- NZQA 3462
- NZQA 17593
- NZQA 20551
- NZQA 20552

Driver Licence Number
Driver Licence Extension
Licence Expiry Date
Passenger Licence Renewal Due
Driver Phone Number*

dd/mm/yyyy
dd/mm/yyyy

⁽¹⁾ Driver Number is the Transport Service licence number as granted according to NZTA requirements.

Save Cancel

Home | Transport Operators | Transactions | User Management | Reports

Find Transport Operators | Find Drivers | Find Vehicles | Create Driver | **Create Vehicle**

I want to...
Upload vehicle details

Create Vehicle

Vehicle Details
Transport Operator Co-operative Cab Company

	*Fleet Number ⁽¹⁾	*Registration Plate ⁽²⁾	*Registration Date ⁽³⁾	*Hoist Capable
Vehicle 1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input checked="" type="radio"/> No
Vehicle 2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input checked="" type="radio"/> No
Vehicle 3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input checked="" type="radio"/> No
Vehicle 4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input checked="" type="radio"/> No
Vehicle 5	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input checked="" type="radio"/> No
Vehicle 6	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input checked="" type="radio"/> No

⁽¹⁾ The unique (to Transport Operator) fleet number assigned by the approved taxi organisation to the vehicle in accordance with NZTA requirements.
⁽²⁾ The vehicle registration plate number
⁽³⁾ The date the vehicle was first registered in New Zealand.

You can create up to 6 vehicle records at the same time for a single Transport Operator.

Cancel Save

Update a Record

1. Click the “*Edit This (Driver/Vehicle)*” action link
2. Edit details as required
3. Click Save

The screenshot displays the Ridewise web application interface. At the top, the Ridewise logo and tagline are on the left, and the user's login information (Welcome Phil Environment: Development Role: Transport Operator Administrator) and version number (v 3.0.17067) are on the right. A navigation menu includes Home, Transport Operators, Transactions, User Management, and Reports. Below this, a secondary menu has links for Find Transport Operators, Find Drivers, Find Vehicles, Create Driver, and Create Vehicle. The main content area is divided into sections: 'I want to...' with a circled 'Edit this driver' link, 'Driver Details' for a driver named 'TEST' (status: Active), and 'Driver History' with a table showing a single entry.

Driver Details

Transport Operator:	Airport Shuttles (Dunedin)	Driver Licence Number:	
Driver Number:	OTAG01	Driver Licence Extension:	
Driver Training:		Licence Expiry Date:	
Next Training Date Due:		Passenger Licence Renewal Due:	
		Contact Number:	555

Driver History

Date	User	Notes
1/03/2017 11:54:21 a.m.	phil	Driver Created

Suspend an Entity

1. Click the “Suspend This (Driver/Vehicle)” action link
2. Select a Reason from the drop down list
3. Enter text into the Notes field
4. Click Save

Welcome Phil Environment: **Development Role: Transport Operator Administrator** | [Log Off](#) | [Help](#) | [Terms of Use](#) | v 3.0.17067

Home | **Transport Operators** | Transactions | User Management | Reports

Find Transport Operators | Find Drivers | Find Vehicles | Create Driver | Create Vehicle

I want to...

- Edit this driver
- Suspend this driver**
- Add driver note
- View transactions

Driver Details

TEST Test
Active

Transport Operator: [Airport Shuttles \(Dunedin\)](#)
Driver Number: OTAGO1
Driver Training:
Next Training Date Due:

Driver Licence Number:
Driver Licence Extension:
Licence Expiry Date:
Passenger Licence Renewal Due:
Contact Number: 555

Driver History

Date	User	Notes
1/03/2017 11:54:21 a.m.	phil	Driver Created

Welcome Phil Environment: **Development Role: Transport Operator Administrator** | [Log Off](#) | [Help](#) | [Terms of Use](#) | v 3.0.17067

Home | **Transport Operators** | Transactions | User Management | Reports

Find Transport Operators | Find Drivers | Find Vehicles | Create Driver | Create Vehicle

I want to...

- Edit this driver
- Un-suspend this driver**
- Add driver note
- View transactions

Driver Details

TEST Test
Suspended

Transport Operator: [Airport Shuttles \(Dunedin\)](#)
Driver Number: OTAGO1
Driver Training:
Next Training Date Due:

Driver Licence Number:
Driver Licence Extension:
Licence Expiry Date:
Passenger Licence Renewal Due:
Contact Number: 555

Driver History

Date	User	Notes
17/03/2017 3:50:08 p.m.	philtagoto	Suspend - Driver Suspend 1: Under Investigation
1/03/2017 11:54:21 a.m.	phil	Driver Created

Copyright: given to other parties without written authorization.

Un-suspend an Entity

1. Click the “Un-suspend This (Driver/Vehicle)” action link
2. Select a Reason from the drop down list
3. Enter text into the Notes field
4. Click Save

The screenshot shows the Ridewise web application interface. At the top, there is a navigation bar with the Ridewise logo and the tagline 'TOTAL MOBILITY. TOTALLY MANAGED'. The user is logged in as 'Development Role: Transport Operator Administrator'. The main content area is divided into several sections:

- I want to...:** A sidebar menu with options: 'Edit this driver', 'Un-suspend this driver' (circled in red), 'Add driver role', and 'View transactions'.
- Driver Details:** A section for driver 'TEST Test' with status 'Suspended'. It includes fields for:
 - Transport Operator: Airport Shuttles (Dunedin)
 - Driver Number: OTAGO1
 - Driver Licence Number:
 - Driver Licence Extension:
 - Licence Expiry Date:
 - Passenger Licence Renewal Due:
 - Contact Number: 555
- Driver History:** A table showing the driver's history:

Date	User	Notes
17/03/2017 3:50:08 p.m.	philotagoto	Suspend - Driver Suspend 1: Under Investigation
1/03/2017 11:54:21 a.m.	phil	Driver Created

Add Record Note

1. Click the “Add (Driver/Vehicle) Note” action link
2. Fill in the fields required
3. Click Save

Welcome Phil Environment: **Development Role: Transport Operator Administrator** [Log Off] [Help] [Terms of Use]
v 3.0.17067

Home | Transport Operators | Transactions | User Management | Reports

Find Transport Operators | Find Drivers | Find Vehicles | Create Driver | Create Vehicle

I want to...

- Edit this driver
- ~~Un-suspend this driver~~
- Add driver note**
- View transactions

Driver Details

TEST
Test
Suspended

Transport Operator: [Airport Shuttles \(Dunedin\)](#)
Driver Number: OTAGO1

Driver Licence Number:
Driver Licence Extension:
Licence Expiry Date:
Passenger Licence Renewal Due:
Contact Number: 555

Driver History

Date	User	Notes
17/03/2017 3:50:08 p.m.	philotagoto	Suspend - Driver Suspend 1: Under Investigation
1/03/2017 11:54:21 a.m.	phil	Driver Created

Welcome Phil Environment: **Development Role: Transport Operator Administrator** [Log Off] [Help] [Terms of Use]
v 3.0.17067

Home | Transport Operators | Transactions | User Management | Reports

Find Transport Operators | Find Drivers | Find Vehicles | Create Driver | Create Vehicle

I want to...

No actions available

Driver Details

TEST
Test
Suspended

Transport Operator: [Airport Shuttles \(Dunedin\)](#)
Driver Number: OTAGO1

Driver Licence Number:
Driver Licence Extension:
Licence Expiry Date:
Passenger Licence Renewal Due:
Contact Number: 555

New Driver Note

Notes*

This driver has now left

Save Cancel

Welcome Phil Environment: **Development Role: Transport Operator Administrator** | [Log Off](#) | [Help](#) | [Terms of Use](#) | v 3.0.17067

ridewise
TOTAL MOBILITY. TOTALLY MANAGED

Home | Transport Operators | Transactions | User Management | Reports

Find Transport Operators | Find Drivers | Find Vehicles | Create Driver | Create Vehicle

I want to...

- Edit this driver
- Un-suspend this driver
- Add driver note
- View transactions

Driver Details

TEST
Test
Suspended

Transport Operator: Airport Shuttles (Dunedin)
Driver Number: OTAGO1
Driver Licence Number:
Driver Licence Extension:
Licence Expiry Date:
Passenger Licence Renewal Due:
Contact Number: 555

Driver History

Date	User	Notes
17/03/2017 3:56:25 p.m.	philotagoto	Note: This driver has now left
17/03/2017 3:50:08 p.m.	philotagoto	Suspend - Driver Suspend 1: Under Investigation
1/03/2017 11:54:21 a.m.	phi	Driver Created

Transport Operator Specific Use Cases

Transaction Specific Use Cases

Create a Transaction

1. Click the “*Transactions*” tab
2. Click the “Create Transaction” link
3. Fill in the fields as required
4. Click Save

New Transaction

Vehicle Details

*Transport Operator	<input type="text"/>	Transport Operator Number:	<input type="text"/>
*Driver Name	<input type="text"/>	*Vehicle Number	<input type="text"/>

Transaction Type

Voucher *Voucher or Reference number

Manual Backup

Region* Operator Reference Number

Trip Details

Trip Date*

Pickup Location*	Start GIS Co-ordinates	Start Time*
<input type="text"/>	<input type="text"/>	<input type="text"/>
Dropoff Location*	End GIS Co-ordinates	End Time*
<input type="text"/>	<input type="text"/>	<input type="text"/>
\$ Fare Paid by Passenger*	\$ Discount Given*	\$ Total Fare*
<input type="text"/>	<input type="text"/>	<input type="text"/>
Number of Passengers	Kilometres	
<input type="text"/>	<input type="text"/>	

Client Details [add client](#)

Client Number <input type="text"/>	Client First Name <input type="text"/>
Hoist Deployed* <input type="radio"/> Yes <input type="radio"/> No	Client Surname <input type="text"/>

[remove client](#)

Notes

Search

Transaction Number

more search options
reset search

I want to...

- Add followup note
- Add to invoice
- Remove from invoice
- Void selected
-
- Export this view
- Export transactions

Search Results

Results for search [All Transactions]

[Follow ups view](#)

57370 entries match search criteria

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Trans #	Status	Trans Operator	Trip Date	Total Fare	Fare Paid	Concession	Concession Type	Hold	Invoice Number	Invoice			
180927	Pending	Co-operative Cab Company	2/11/2011	\$30.00	\$15.00	\$15.00	Independent	No					
180926	Pending	Co-operative Cab Company	1/10/2011	\$20.00	\$10.00	\$10.00	Independent	Yes					
180925	Pending	Co-operative Cab Company	1/08/2011	\$20.00	\$10.00	\$10.00	Independent	Yes					
180924	Pending	Co-operative Cab Company	1/07/2011	\$20.00	\$10.00	\$10.00	Independent	Yes					
180923	Pending	Co-operative Cab Company	2/10/2011	\$20.00	\$10.00	\$10.00	Independent	Yes					
180922	Pending	Co-operative Cab Company	29/09/2011	\$20.00	\$10.00	\$10.00	Independent	Yes					
180921	Pending	Co-operative Cab Company	11/09/2011	\$24.00	\$0.00	\$24.00	Supported	Yes					
180920	Pending	Co-operative Cab Company	30/07/2011	\$20.10	\$10.05	\$10.05	Independent	No					
180919	Pending	Co-operative Cab Company	29/07/2011	\$7.60	\$3.80	\$3.80	Independent	No					
180918	Pending	Co-operative Cab Company	28/07/2011	\$8.00	\$4.00	\$4.00	Other Region	Yes					
180917	Pending	Co-operative Cab Company	27/07/2011	\$16.60	\$8.30	\$8.30	Independent	No					
180916	Pending	Co-operative Cab Company	26/07/2011	\$9.20	\$4.60	\$4.60	Independent	No					
180915	Pending	Co-operative Cab Company	25/07/2011	\$27.10	\$13.55	\$13.55	Independent	No					
180914	Pending	Co-operative Cab Company	24/07/2011	\$11.20	\$5.60	\$5.60	Independent	No					
180913	Pending	Co-operative Cab Company	23/07/2011	\$17.20	\$8.60	\$8.60	Independent	No					
180912	Pending	Co-operative Cab Company	22/07/2011	\$8.60	\$4.30	\$4.30	Independent	No					
180911	Pending	Co-operative Cab Company	21/07/2011	\$18.00	\$9.00	\$9.00	Independent	No					
180910	Pending	Co-operative Cab Company	20/07/2011	\$26.00	\$13.00	\$13.00	Independent	No					
180909	Pending	Co-operative Cab Company	19/07/2011	\$47.00	\$23.50	\$23.50	Independent	No					
180908	Pending	Co-operative Cab Company	18/07/2011	\$20.00	\$10.00	\$10.00	Independent	No					

First Previous 1 2 3 4 5 Next Last jump to page 1

Showing 1 to 20 of 10,000 entries
 Show 20 entries

Total Mobility Scheme

v 1.0.0

Home | **Transport Operators** | **Transactions** | User Management | Reports

[Find Transactions](#) | [Find Invoices](#) | [Create Transaction](#) | [Create Invoice](#) | [Upload Transactions](#)

I want to...

- Add to invoice
- Void transaction
- Add followup note

Transaction Details

Transaction Number: 180928	Transport Operator: Driver: Aloysius Munroe Driver Number: Vehicle Number: Voucher/Ref Number: 123006	Trip Date: 2/11/2011 Pickup Location: Hospital (12:45 p.m.) Drop Off Location: Care NZ (12:55 p.m.) Km's Travelled: 20.0 km's (0h 10m) Passengers: 1 Hoist Deployed: No Total Fare: \$30.00 Concession: \$15.00 Fare Paid: \$15.00 Amt. to be Invoiced: \$15.00
Transaction Type: Voucher Pending Manually Entered	Operator Trans Ref: Voucher/Entered Details Client Number: 941 Client Surname: Taylor Client First Name: Anthony Lee Held Details Client Number: 941 Client Surname: Taylor Client First Name: Anthony Lee Client Entitlement: Independent	

Transaction History

Date	User	Status	Notes
3/11/2011 3:13:41 p.m.	tophil	Pending	Manual Creation

Upload Transactions

1. Click the "*Transactions*" tab
2. Click "*Upload Transactions*" link
3. Download the latest version of the Transaction File
4. Complete the spreadsheet as desired
5. Save the file as a .csv. If using Excel to edit the file, choose "File → Save As" from the Excel menu and save the file as a .csv file
6. Back in Ridewise, click the *Select* button
7. Browse to the updated file and click *Open*. The filename should now appear in the small file window
8. Click *Upload*
9. Confirm upload by clicking *Continue*
10. Transactions will be processed one by one against the Transaction flagging rules and will begin to appear in Ridewise once processed. This process takes approximately 2 seconds per Transaction so for very large files, Transactions may take some time to appear
11. If other Operators are in the process of uploading files, your file will be queued to go after the last current file is processed. Depending on how many files are queued, your Transactions may not appear for a number of hours

Validation Failure

1. If any of the fields in the spreadsheet fail to pass validation, an error is displayed detailing the reason for the failure and the row in the spreadsheet that has caused the error
2. No records will be uploaded in the case of a validation failure

Welcome Phil Environment: **Ridewise** Role: **Transport Operator Administrator** | [Log Off](#) | [Help](#) | [Terms of Use](#) | v 1.0.0

Total Mobility Scheme

Home | Transport Operators | **Transactions** | User Management | Reports

[Find Transactions](#) | [Find Invoices](#) | [Create Transaction](#) | [Create Invoice](#) | [Upload Transactions](#)

I want to...
No actions available

Upload Transactions
Click **Select...** to choose a file to upload transaction records from:
Important: Ridewise will only accept files in a .csv format. To create a .csv file using Excel select "Save As..." from the file menu and select .CSV.

Select...

The latest version (2.3) of the upload transaction file, is available [here](#).

Upload | **Cancel**

Eyede NZ Ltd
PO Box 31012
Lower Hutt 5012
+64 4 939 8764

ridewise
TOTAL MOBILITY. TOTALLY MANAGED

Welcome Phil Environment: **Ridewise** Role: **Transport Operator Administrator** | [Log Off](#) | [Help](#) | [Terms of Use](#) | v 1.0.0

Total Mobility Scheme

Home | Transport Operators | **Transactions** | User Management | Reports

[Find Transactions](#) | [Find Invoices](#) | [Create Transaction](#) | [Create Invoice](#) | [Upload Transactions](#)

I want to...
No actions available

Upload Transactions
You have chosen to upload 12 Transactions.
Click **Continue** to load these records or **Cancel** to decline.

Continue | **Cancel**

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ridewise
TOTAL MOBILITY. TOTALLY MANAGED

Automatically (System) Flag a Transaction

Ridewise will flag a Transaction as an Exception if the Transaction meets pre-defined business rules and will usually be evoked by a Transaction entering Ridewise via the Web Interface (ie, transactions from Smartpay). These rules are also applied to webform and csv upload, but in these cases, the business rule may cause the Transaction to be rejected rather than just flagged. For a list of the business rules, see Appendix 3.

- The Transaction will display a flag icon and the text of “System flagged for follow up. Refer to Transaction History for details.”
- The Transaction will display a red flag icon in standard Transaction views
- The Transaction will appear in views designed to display Flagged Transactions
- The Transaction History will be updated to contain the flagging information

1. Transaction enters Ridewise
2. Ridewise checks the Transaction against the automatic exception flagging business rules
3. If the Transaction meets any of the Exception criteria, the Transaction is flagged as “System”. For each rule that is met, the appropriate transaction exception text is recorded in a field within the Transaction form
4. The Transaction History is updated with Date = date/time, User = system, Status = existing Transaction status, Notes = System flagged for follow up due to: “Enter transaction exception text for all exception/s”

The screenshot shows the Ridewise web interface for a 'Total Mobility Scheme'. The user is logged in as 'Transport Operator Administrator'. The main content area displays 'Transaction Details' for transaction number 180923. The transaction is a 'Voucher' and is in a 'Pending' status. A red box highlights a system message: 'System Flagged for follow up. Refer to Transaction History for details.' The transaction was manually entered. The details include: Transport Operator: Amy Walker, Driver: Amy Walker, Vehicle Number: 854, Voucher/Ref Number: 854 (Voucher not verified), Operator Trans Ref: 6654, Client Number: 6654, Client Surname: (Mismatch), Client First Name: (Mismatch), Client Surname: (Mismatch), Client First Name: (Mismatch), Client Entitlement: (Mismatch). Trip details include: Trip Date: 2/10/2011, Pickup Location: Here (12:15 p.m.), Drop Off Location: There (12:20 p.m.), Km's Travelled: 0.0 km/s (0h 5m), Passengers: 1, Hoist Deployed: Yes, Total Fare: \$20.00, Concession: \$10.00, Fare Paid: \$10.00, Amt. to be invoiced: \$21.50. The Transaction History table shows two entries: one from the System on 27/10/2011 at 11:04:42 a.m. with status 'Pending' and notes 'System flagged for follow up due to: Client hoist anomaly; Suspended client', and another from user 'tophil' on 27/10/2011 at 11:04:37 a.m. with status 'Pending' and notes 'Manual Creation'.

Manually (User) Flag a Transaction

Ridewise provides the ability to specific user types to manually flag a Transaction. If a Transaction has previously been flagged either manually or automatically, this action replaces the existing flag [note the original flag and reasons remain in the transaction history].

- The Transaction will display a flag icon and the text of “User flagged for follow up. Refer to Transaction History for details.”
- The Transaction will display a red flag icon in standard Transaction views
- The Transaction will appear in views designed to display Flagged Transactions
- The Transaction History will be updated to contain the flagging information

A. User is viewing a Single Transaction record

1. User clicks “Add followup note” action

B. User is viewing Transactions in a Transaction view

1. User ticks the check-box for the desired Transactions
2. User clicks “Add followup note” action

1. User is presented with a text entry box
2. User enters desired text (limited to 500 characters) and clicks “Save flag” button
3. User is returned to the previous view of the Transaction(s)
4. The Transaction is flagged as “User” [i.e. Flag type = User (as opposed to System)] (this overrides any existing flag type)
5. The Transaction History is updated with Date = date/time, User = username, Status =current Transaction Status, Notes = User flagged for follow up due to: “Entered text here”


Welcome GWRCPHil Environment: **Ridewise** Role: **Council Administrator** | [Log Off](#) | [Help](#) | [Terms of Use](#) | v 1.0.0

Total Mobility Scheme

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[Find Transactions](#) | [Find Invoices](#) | [View SAP Files](#)

I want to...

[Add followup note](#)

Transaction Details

<p>Transaction Number: 180928</p> <p>Transaction Type: Voucher</p> <p style="color: green; font-weight: bold;">Pending</p> <p>Manually Entered</p>	<p>Transport Operator: Driver: Aloysius Munroe</p> <p>Driver Number: Vehicle Number: Voucher/Ref Number: 123006</p> <p>Operator Trans Ref: Voucher/Entered Details Client Number: Client Surname: Taylor Client First Name: Anthony Lee</p> <p>Held Details Client Number: Client Surname: Taylor Client First Name: Anthony Lee Client Entitlement: Independent</p>	<p>Trip Date: 2/11/2011</p> <p>Pickup Location: Hospital (12:45 p.m.)</p> <p>Drop Off Location: Care NZ (12:55 p.m.)</p> <p>Km's Travelled: 20.0 km/s (0h 10m)</p> <p>Passengers: 1</p> <p>Hoist Deployed: No</p> <p>Total Fare: \$30.00</p> <p>Concession: \$15.00</p> <p>Fare Paid: \$15.00</p> <p>Amt. to be Invoiced: \$15.00</p>
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Transaction History

Date	User	Status	Notes
3/11/2011 3:13:41 p.m.	tophil	Pending	Manual Creation

I want to...

Transaction Details

<p>Transaction Number: 180928</p> <p>Transaction Type: Voucher</p> <p style="color: green; font-weight: bold;">Pending</p> <p>Manually Entered</p>	<p>Transport Operator: Driver: Aloysius Munroe</p> <p>Driver Number: Vehicle Number: Voucher/Ref Number: 123006</p> <p>Operator Trans Ref:</p>	<p>Trip Date: 2/11/2011</p> <p>Pickup Location: Hospital (12:45 p.m.)</p> <p>Drop Off Location: Care NZ (12:55 p.m.)</p> <p>Km's Travelled: 20.0 km/s (0h 10m)</p> <p>Passengers: 1</p> <p>Hoist Deployed: No</p>
--	--	---

Add this transaction for followup

You have selected to add this transaction for followup
Please enter a reason in the box below.*

Total Mobility Scheme

v 1.0.0

Home Clients Agencies Transport Operators **Transactions** User Management Reports Settings

[Find Transactions](#) | [Find Invoices](#) | [View SAP Files](#)

I want to...

- Add followup note
- Remove followup flag

Transaction Details

Transaction Number:
180928

Transaction Type:

Voucher

Pending

★ User Flagged for followup. Refer to Transaction History for details

Manually Entered

Transport Operator:
 Driver: **Aloysius Munroe**
 Driver Number:
 Vehicle Number:
 Voucher/Ref Number: **123006**
 Operator Trans Ref:
 Voucher/Entered Details
 Client Number:
 Client Surname: **Taylor**
 Client First Name: **Anthony Lee**
 Held Details
 Client Number:
 Client Surname: **Taylor**
 Client First Name: **Anthony Lee**
 Client Entitlement: **Independent**

Trip Date: **2/11/2011**
 Pickup Location: **Hospital (12:45 p.m.)**
 Drop Off Location: **Care NZ (12:55 p.m.)**
 Km's Travelled: **20.0 km's (0h 10m)**
 Passengers: **1**
 Hoist Deployed: **No**
 Total Fare: **\$30.00**
 Concession: **\$15.00**
 Fare Paid: **\$15.00**
 Amt. to be Invoiced: **\$15.00**

Transaction History

Date	User	Status	Notes
3/11/2011 3:27:10 p.m.	gwrpchl	Pending	Flagged for follow up - Client under investigation
3/11/2011 3:13:41 p.m.	tophl	Pending	Manual Creation

Manually Un Flag a Transaction

Ridewise provides the ability for specific user types to manually remove a flag from a Transaction. This action completely un-flags the Transaction regardless of how a Transaction was originally flagged

- The Transaction will no longer display the flag icon or the flagged for follow up text at the top of the record
- The Transaction will no longer display a red flag icon in standard Transaction views
- The Transaction will no longer appear in views designed to display Flagged Transactions
- The Transaction History will be updated to record the flag removal

A. User is viewing a Single Transaction record

1. User clicks "Remove followup flag" action

B. User is viewing Transactions in a Transaction view

1. User ticks the check-box for the desired Transactions
2. User clicks "Remove followup flag" action

3. User is presented with a text entry box
4. User enters desired text (limited to 500 characters) and clicks "Remove flag" button
5. User is returned to the previous view of the Transaction(s)
6. The Transaction flag is removed [but remains in history]
7. The flagged text reason is removed [but remains in history]
8. If the Transaction had previously been flagged, the Transaction History is updated with Date = date/time, User = username, Status = current Transaction status, Notes = Flag removed due to: "Entered text here" (Note: the Transaction History is not updated if the transaction is not currently flagged. This check is done to compensate for the cases where a large number of Transactions have been selected in a view, some of which are not currently flagged, and removes the need to check if all selected Transactions are currently flagged before proceeding with the flag removal)

Total Mobility Scheme

Home Clients Agencies Transport Operators Transactions User Management Reports Settings

Find Transactions Find Invoices View SAP Files

I want to...

- Add followup note
- Remove followup flag**

Transaction Details

Transaction Number:
180928

Transaction Type:

Voucher

Pending

★ User Flagged for followup. Refer to Transaction History for details

Manually Entered

Transport Operator:
Driver: Aloysius Munroe
Driver Number:
Vehicle Number:
Voucher/Ref Number: 123006
Operator Trans Ref:
Voucher/Entered Details
Client Number:
Client Surname: Taylor
Client First Name: Anthony Lee
Held Details
Client Number:
Client Surname: Taylor
Client First Name: Anthony Lee
Client Entitlement:

Trip Date: 2/11/2011
Pickup Location: Hospital (12:45 p.m.)
Drop Off Location: Care NZ (12:55 p.m.)
Km's Travelled: 20.0 km's (0h 10m)
Passengers: 1
Hoist Deployed: No
Total Fare: \$30.00
Concession: \$15.00
Fare Paid: \$15.00
Amt. to be Invoiced: \$15.00

Transaction History

Date	User	Status	Notes
3/11/2011 3:27:10 p.m.	gwrpcphit	Pending	Flagged for follow up - Client under investigation
3/11/2011 3:13:41 p.m.	tophil	Pending	Manual Creation

Home Clients Agencies Transport Operators Transactions User Management Reports Settings

Find Transactions Find Invoices View SAP Files

I want to...

Transaction Details

Transaction Number:
180928

Transaction Type:

Voucher

Pending

★ User Flagged for followup. Refer to Transaction History for details

Manually Entered

Transport Operator:
Driver: Aloysius Munroe
Driver Number:
Vehicle Number:
Voucher/Ref Number: 123006
Operator Trans Ref:

Trip Date: 2/11/2011
Pickup Location: Hospital (12:45 p.m.)
Drop Off Location: Care NZ (12:55 p.m.)
Km's Travelled: 20.0 km's (0h 10m)
Passengers: 1
Hoist Deployed: No

Remove the flag from this transaction

You have selected to remove the flag from this transaction
Please enter a reason in the box below.*

Investigation complete. Transaction will be honoured.

Remove flag Cancel

Total Mobility Scheme

Home Clients Agencies Transport Operators Transactions User Management Reports Settings

Find Transactions Find Invoices View SAP Files

I want to...

Add followup note

Transaction Details

Transaction Number:
180928
Transaction Type:
Voucher
Pending
Manually Entered

Transport Operator:
Driver: Aloysius Munroe
Driver Number:
Vehicle Number:
Voucher/Ref Number: 123006
Operator Trans Ref:
Voucher/Entered Details
Client Number:
Client Surname: Taylor
Client First Name: Anthony Lee
Held Details
Client Number:
Client Surname: Taylor
Client First Name: Anthony Lee
Client Entitlement:

Trip Date: 2/11/2011
Pickup Location: Hospital (12:45 p.m.)
Drop Off Location: Care NZ (12:55 p.m.)
Km's Travelled: 20.0 km's (0h 10m)
Passengers: 1
Hoist Deployed: No
Total Fare: \$30.00
Concession: \$15.00
Fare Paid: \$15.00
Amt. to be Invoiced: \$15.00

Transaction History

Date	User	Status	Notes
3/11/2011 3:30:40 p.m.	gwrcphl	Pending	Removed follow up flag - Investigation complete. Transaction will be honoured.
3/11/2011 3:27:10 p.m.	gwrcphl	Pending	Flagged for follow up - Client under investigation
3/11/2011 3:13:41 p.m.	tophl	Pending	Manual Creation

View Flagged Transactions from Transactions view

Ridewise allows users to view transactions that have been flagged and allows the user to toggle visible/hidden the “Flag type” and “Flag description” columns and the additional Follow ups search criteria as required.

Basic Flow

1. User clicks Transactions -> Find Transactions
2. User enters desired Search criteria (including Flag Details if required) and clicks Find
3. (Standard) View of matching Transactions is returned
4. User clicks “Follow ups view” link in top right of Search Results panel
5. Search results ‘re-loads’ with Flag type and Flag description columns visible
6. The “Follow ups view” link is now called “Standard View”
7. Clicking “Standard View” hides the Flag Type and Flag Description columns

Note: Ridewise will ‘remember’ the view selection type (“standard” or “follow ups”) and retain this selection for the remainder of the user session.

The screenshot shows the Ridewise web application interface. At the top, there is a navigation menu with options: Home, Clients, Agencies, Transport Operators, Transactions, User Management, Reports, and Settings. Below the navigation menu, there are links for Find Transactions, Find Invoices, and View SAP Files. The main content area is titled 'Total Mobility Scheme' and features a search bar on the left. The search results are displayed in a table with the following columns: Trans #, Status, Trans Operator, Trip Date, Client Number, Surname, First Name, Total Fare, Fare Paid, Concession, and Con. The table shows 170349 entries matching search criteria. The first few rows of the table are as follows:

Trans #	Status	Trans Operator	Trip Date	Client Number	Surname	First Name	Total Fare	Fare Paid	Concession	Con
180928	Allocated	Co-operative Cab Company	2/11/2011	941	Taylor	Anthony Lee	\$30.00	\$15.00	\$15.00	Inde
180927	Allocated	Co-operative Cab Company	2/11/2011	11545	Ormond	Boris	\$30.00	\$15.00	\$15.00	Inde
180926	Allocated	Co-operative Cab Company	1/10/2011	1116	Harrison	Marvin Eustace	\$20.00	\$10.00	\$10.00	Inde
180924	Allocated	Co-operative Cab Company	1/07/2011	8836	Edmonson	Rosa Frances	\$20.00	\$10.00	\$10.00	Inde
180923	Pending	Co-operative Cab Company	2/10/2011	6554			\$20.00	\$10.00	\$10.00	Inde
180922	Pending	Co-operative Cab Company	29/09/2011	18052			\$20.00	\$10.00	\$10.00	Inde
180921	Pending	Co-operative Cab Company	11/09/2011	200805			\$24.00	\$0.00	\$24.00	Supp
180920	Pending	Co-operative Cab Company	30/07/2011	201385	Moore	Annabel Ruth	\$20.10	\$10.05	\$10.05	Inde
180919	Pending	Co-operative Cab Company	29/07/2011	17922	Mosen	Julia	\$7.60	\$3.80	\$3.80	Inde
180918	Pending	Co-operative Cab Company	28/07/2011	410082			\$8.00	\$4.00	\$4.00	Othe
180917	Pending	Co-operative Cab Company	27/07/2011	8645	Pollock	Alexina (Lynn)	\$16.60	\$8.30	\$8.30	Inde
180916	Pending	Co-operative Cab Company	26/07/2011	16894	Austin	Lestie	\$9.20	\$4.60	\$4.60	Inde
180915	Pending	Co-operative Cab Company	25/07/2011	200668	Little	Kyal	\$27.10	\$13.55	\$13.55	Inde
180914	Pending	Co-operative Cab Company	24/07/2011	19299	Arthur	David	\$11.20	\$5.60	\$5.60	Inde

Total Mobility Scheme

Home Clients Agencies Transport Operators **Transactions** User Management Reports Settings

[Find Transactions](#) | [Find Invoices](#) | [View SAP Files](#)

Search

Transaction Number

less search options

Transaction Details...

Transaction Status...

Client Details...

Agency Details...

Operator Details...

Follow ups...

All

Flag Reason

reset search

Find

I want to...

Search Results

Results for search [Flag Type includes "All"]

[Standard view](#)

4094 entries match search criteria

<input type="checkbox"/>		Trans #	Status	Trans Operator	Flag Type	Flag Reason	Trip Date	Client Number
<input type="checkbox"/>		180760	Paid	Co-operative Cab Company	System	Invalid vehicle	8/06/2011	2372
<input type="checkbox"/>		180749	Paid	Co-operative Cab Company	System	Invalid vehicle	8/06/2011	2372
<input type="checkbox"/>		175665	Pending	Executive Cars Ltd.	System	Pickup location missing Drop off location missing	1/06/2011	6690
<input type="checkbox"/>		175807	Pending	Executive Cars Ltd.	System	Pickup location missing Drop off location missing	1/06/2011	6690
<input type="checkbox"/>		173992	Pending	Jabba the Hutt Transport	System	Invalid concession amount	30/05/2011	9972
<input type="checkbox"/>		169725	Pending	24-7 Cars	User	Van has been used to move furniture, GW not will to pay hoist fee	24/05/2011	1410
<input type="checkbox"/>		166885	Pending	Co-operative Cab Company	System	Invalid vehicle	22/05/2011	360
<input type="checkbox"/>		166264	Pending	Co-operative Cab Company	System	Invalid driver	18/05/2011	360
<input type="checkbox"/>		99507	Paid	Jabba the Hutt Transport	System	Invalid concession amount	9/02/2011	2522
<input type="checkbox"/>		81715	Paid	Co-operative Cab Company	System	Invalid driver	13/01/2011	360
<input type="checkbox"/>		81003	Paid	Co-operative Cab Company	System	Invalid driver	12/01/2011	2372
<input type="checkbox"/>		76634	Paid	Co-operative Cab Company	System	Invalid driver	6/01/2011	2372
<input type="checkbox"/>		73715	Paid	Co-operative Cab Company	System	Invalid driver	1/01/2011	2372

View Flagged Transactions from Dashboard

1. User clicks Home -> Follow ups
2. Dashboard view displaying all Flagged Transactions is displayed, sorted by Transaction number
3. User can;
 - a. Click on Transaction Number. This takes the user to the Transaction View, in “Flag View” mode, and displays the Transaction Form
 - b. Click on “Go to followups view”. This takes the user to the Transaction View, in “Flag View” mode, and displays the list of Transactions in Flag Type then Flag Description order

Home Clients Agencies Transport Operators Transactions User Management Reports Settings

I want to...

Clients

- Awaiting assessment (2)
- Awaiting client photo (1038)
- Awaiting photo card (54)
- Transfer in (0)
- Transfer out (2)
- Requiring audit (0)

Assessments

- Awaiting approval (22)
- Awaiting information (2)
- Currently incomplete (23)

Reassessments

- Overdue (2178)
- Due within 1 month (192)

Invoices

- Awaiting payment (1)
- Requiring approval (4)
- Pending/referred back (4)

Transactions

- Follow ups (4094)
- Invoiced last 60 days (14)

Transactions - follow ups

[Go to followups view](#)

Trans #	Status	Trans Operator	Flag Type	Flag Reason	Trip Date	Client Number	Surname	First Name	T
180023	Pending	Co-operative Cab Company	System	Client hoist anomaly Suspended client	2/10/2011	6554			\$2
180921	Pending	Co-operative Cab Company	System	Invalid driver Invalid vehicle	11/09/2011	200805			\$2
180888	Paid	Co-operative Cab Company	User	testing	7/06/2011	4330	Doyle	Dolores Dora	\$2
180895	Pending	hop in Private Hire	User	Under investigation	7/06/2011	2678	White	Ives Lancelot	\$1
180883	Pending	24-7 Cars	User	Transport Operator:Test RW-192	7/06/2011	10118	Asimov	Ignatius Becket	\$1
180882	Paid	Co-operative Cab Company	System	Client hoist anomaly	7/06/2011	2966	Nelson	Bride Julie	\$9
180873	Paid	Co-operative Cab Company	System	Client hoist anomaly	7/06/2011	2966	Nelson	Bride Julie	\$9
180866	Pending	Formula 1 Taxis	System	Pickup location missing Drop off location missing	7/06/2011	10774	Robert	Ariadne Olive	\$2
180863	Pending	Jumbo Cabs	System	Pickup location missing Drop off location missing	7/06/2011	10087	Longfellow	Leonara Delia	\$1
180861	Pending	Jumbo Cabs	System	Pickup location missing Drop off location missing	7/06/2011	6030	Kennedy	Frieda Dominique	\$2
180860	Pending	Formula 1 Taxis	System	Pickup location missing Drop off location missing	7/06/2011	6383	Ingleson	Lily Isabelle	\$3
180849	Pending	Jumbo Cabs	System	Pickup location missing Drop off location missing	7/06/2011	4816	McQueen	Jenny Priscilla	\$1
180846	Pending	Formula 1 Taxis	System	Pickup location missing Drop off location missing	7/06/2011	10001	Ormond	Laurette Irma	\$7

Void Transactions

User must be of type Transport Operator

User must find a transaction with a status of "Pending"

1. Search for the Transaction(s) that you wish to Void
2. Either
 - a. View the Transaction and click the "Void Transaction" action link
 - or
 - b. Check the Transactions that you wish to Void
 - c. Click the "Void Selected" action link
3. Enter the reason for voiding
4. Click *Void*
5. The Transaction is flagged as 'Void'
6. The Transaction no longer appears in transaction views by default
7. No further actions can be taken with the Void Transaction

- I want to...**
- [Add to Invoice](#)
 - [Void transaction](#)**
 - [Add followup note](#)

Transaction Details

Transaction Number: **180925**

Transaction Type: **Manual Backup**

Pending

Manually Entered

Transport Operator:		Trip Date:	1/08/2011
Driver:	Derek Noah Harris	Pickup Location:	WELLINGTON (9:22 a.m.)
Driver Number:		Drop Off Location:	JVILLE/NEWLANDS (9:38 a.m.)
Vehicle Number:		Km's Travelled:	0.0 km's (0h 16m)
Voucher/Ref Number:		Passengers:	1
Operator Trans Ref:	E1323127	Holst Deployed:	Yes
Voucher/Entered Details		Total Fare:	\$20.00
Client Number:	1728	Concession:	\$10.00
Client Surname:	Popov	Fare Paid:	\$10.00
Client First Name:	Cordelia Mudge	Amt. to be Invoiced:	\$21.00
Held Details			
Client Number:	1728		
Client Surname:	Popov		
Client First Name:	Cordelia Mudge		
Client Entitlement:	Independent		

Transaction History

Date	User	Status	Notes
27/10/2011 11:20:15 a.m.	tophil	Pending	Upload from Excel/CSV file
27/10/2011 11:20:15 a.m.	tophil	Pending	180670:Paid::

- I want to...**
- [Add to Invoice](#)
 - [Void transaction](#)
 - [Add followup note](#)

Transaction Details

Transaction Number: **180925**

Transaction Type: **Manual Backup**

Pending

Manually Entered

Transport Operator:		Trip Date:	1/08/2011
Driver:	Derek Noah Harris	Pickup Location:	WELLINGTON (9:22 a.m.)
Driver Number:		Drop Off Location:	JVILLE/NEWLANDS (9:38 a.m.)
Vehicle Number:		Km's Travelled:	0.0 km's (0h 16m)
Voucher/Ref Number:		Passengers:	1
Operator Trans Ref:	E1323127	Holst Deployed:	Yes

Void Transaction

You have selected to void this transaction. Please enter a reason in the box below.*

Entered in error

Total Mobility Scheme

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Home Transport Operators **Transactions** User Management Reports

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Search

Transaction Number

less search options

Transaction Details...

Transaction Status

- Pending
- Allocated
- Awaiting Approval
- Approved
- ~~Paid~~
- Void**

Client Details...

Operator Details...

Follow ups...

reset search

Find

Search Results

Results for search [TransactionStatus is "Pending", "Allocated", "Awaiting Approval", "Approved", "Paid" or "Void"]

[follow ups view](#)

60885 entries match search criteria

<input type="checkbox"/>	<input type="checkbox"/>	Trans #	Status	Trans Operator	Trip Date	Total Fare	Fare Paid	Concession	Concession Type	Holst	Invoice Number	Invoice
<input type="checkbox"/>	<input type="checkbox"/>	180928	Pending	Co-operative Cab Company	2/11/2011	\$30.00	\$15.00	\$15.00	Independent	No		
<input type="checkbox"/>	<input type="checkbox"/>	180927	Pending	Co-operative Cab Company	2/11/2011	\$30.00	\$15.00	\$15.00	Independent	No		
<input type="checkbox"/>	<input type="checkbox"/>	180926	Pending	Co-operative Cab Company	1/10/2011	\$20.00	\$10.00	\$10.00	Independent	Yes		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	180925	Void	Co-operative Cab Company	1/08/2011	\$20.00	\$10.00	\$10.00	Independent	Yes		
<input type="checkbox"/>	<input type="checkbox"/>	180924	Pending	Co-operative Cab Company	1/07/2011	\$20.00	\$10.00	\$10.00	Independent	Yes		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	180923	Pending	Co-operative Cab Company	2/10/2011	\$20.00	\$10.00	\$10.00	Independent	Yes		
<input type="checkbox"/>	<input type="checkbox"/>	180922	Pending	Co-operative Cab Company	29/09/2011	\$20.00	\$10.00	\$10.00	Independent	Yes		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	180921	Pending	Co-operative Cab Company	11/09/2011	\$24.00	\$0.00	\$24.00	Supported	Yes		
<input type="checkbox"/>	<input type="checkbox"/>	180920	Pending	Co-operative Cab Company	30/07/2011	\$20.10	\$10.05	\$10.05	Independent	No		
<input type="checkbox"/>	<input type="checkbox"/>	180919	Pending	Co-operative Cab Company	29/07/2011	\$7.60	\$3.80	\$3.80	Independent	No		
<input type="checkbox"/>	<input type="checkbox"/>	180918	Pending	Co-operative Cab Company	28/07/2011	\$8.00	\$4.00	\$4.00	Other Region	Yes		
<input type="checkbox"/>	<input type="checkbox"/>	180917	Pending	Co-operative Cab Company	27/07/2011	\$16.60	\$8.30	\$8.30	Independent	No		
<input type="checkbox"/>	<input type="checkbox"/>	180916	Pending	Co-operative Cab Company	26/07/2011	\$9.20	\$4.60	\$4.60	Independent	No		
<input type="checkbox"/>	<input type="checkbox"/>	180915	Pending	Co-operative Cab Company	25/07/2011	\$27.10	\$13.55	\$13.55	Independent	No		

Create a Reversal Transaction

User must be of type Transport Operator

User is viewing a Transaction with a status of "Paid" or "Approved" that does not currently have a Reversal associated with it

Basic Flow

1. Click the "Reverse Transaction" action link
2. Enter a reason
3. Click *Create Reversal*
4. A Reversal Transaction is created which is a duplicate of the original transaction but with the Transaction amounts reversed
5. The transaction number is the same as the original transaction with suffixed with a "-R"

Welcome Phil Environment: **Ridewise Role: Transport Operator Administrator** | [Log Off](#) | [Help](#) | [Terms of Use](#) | v 1.0.0

Total Mobility Scheme

Home | Transport Operators | Transactions | User Management | Reports

Find Transactions | Find Invoices | Create Transaction | Create Invoice | Upload Transactions

I want to...

- Reverse transaction**
- Add followup note

Transaction Details

Transaction Number: **180896**

Transaction Type: **Electronic**

Paid

Automatic

Transport Operator:

Driver: Kieran Jones Korbut

Driver Number: [REDACTED]

Vehicle Number: [REDACTED]

Operator Trans Ref: E1318160

Voucher/Entered Details

Client Number: 5464

Client Surname: Thompson

Client First Name: Mark Richard

Held Details

Client Number: 5464

Client Surname: Lumley **Mismatch**

Client First Name: Leonora Etienne **Mismatch**

Client Entitlement: Independent

Trip Date: 7/06/2011

Pickup Location: UPPER HUTT (3:55 p.m.)

Drop Off Location: UPPER HUTT (4:00 p.m.)

Km's Travelled: 0.0 km's (0h 5m)

Passengers: 1

Hoist Deployed: No

Total Fare: \$11.00

Concession: \$5.50

Fare Paid: \$5.50

Amount Invoiced: \$5.50

Invoice Number: [REDACTED]

Transaction History

Date	User	Status	Notes
9/08/2011 11:07:49 a.m.	gwrphil	Paid	Paid, SAP file created for invoice INDFE02
25/07/2011 2:32:40 p.m.	gwrphil	Approved	Approved for payment on invoice INDFE02
15/06/2011 3:22:32 p.m.	tophil	Awaiting Approval	Submitted for payment approval on invoice INDFE02
15/06/2011 3:22:25 p.m.	tophil	Allocated	Allocated to invoice INDFE02

ridewise TOTAL MOBILITY. TOTALLY MANAGED

Welcome Phil Environment: **Ridewise** Role: **Transport Operator Administrator** | [Log Off](#) | [Help](#) | [Terms of Use](#) | v 1.0.0

Total Mobility Scheme

Home | Transport Operators | **Transactions** | User Management | Reports

[Find Transactions](#) | [Find Invoices](#) | [Create Transaction](#) | [Create Invoice](#) | [Upload Transactions](#)

I want to...

Transaction Details

<p>Transaction Number: 180896</p> <p>Transaction Type: Electronic</p> <p>Paid</p> <p>Automatic</p>	<p>Transport Operator: Driver: Driver Number: Vehicle Number: Operator Trans Ref:</p> <p>Kieran Jones Korbut E1318160</p>	<p>Trip Date: Pickup Location: Drop Off Location: Km's Travelled: Passengers: Hoist Deployed:</p> <p>7/06/2011 UPPER HUTT (3:55 p.m.) UPPER HUTT (4:00 p.m.) 0.0 km's (0h 5m) 1 No</p>
---	---	--

Reverse Transaction

You have selected to create a reverse transaction for this transaction.
Please enter a reason in the box below.*

[Create Reversal](#) [Cancel](#)

ridewise TOTAL MOBILITY. TOTALLY MANAGED

Welcome Phil Environment: **Ridewise** Role: **Transport Operator Administrator** | [Log Off](#) | [Help](#) | [Terms of Use](#) | v 1.0.0

Total Mobility Scheme

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I want to...

- [Add to invoice](#)
- [Delete reversed transaction](#)
- [Add followup note](#)

Transaction Details

<p>Transaction Number: 180896-R</p> <p>Transaction Type: Electronic</p> <p>Pending</p> <p>Reversal of transaction 180896</p>	<p>Transport Operator: Driver: Driver Number: Vehicle Number: Operator Trans Ref:</p> <p>Kieran Jones Korbut E1318160</p> <p>Voucher/Entered Details</p> <p>Client Number: 5464 Client Surname: Thompson Client First Name: Mark Richard</p> <p>Held Details</p> <p>Client Number: 5464 Client Surname: Lumley Mismatch Client First Name: Leonora Etienne Mismatch Client Entitlement: Independent</p>	<p>Trip Date: Pickup Location: Drop Off Location: Km's Travelled: Passengers: Hoist Deployed: Total Fare: Concession: Fare Paid: Amt. to be Invoiced:</p> <p>7/06/2011 UPPER HUTT (3:55 p.m.) UPPER HUTT (4:00 p.m.) 0.0 km's (0h 5m) 1 No -\$11.00 -\$5.50 -\$5.50 -\$5.50</p>
---	---	---

Transaction History

Date	User	Status	Notes
3/11/2011 3:47:54 p.m.	tophl	Pending	Created as a reversal of transaction number 180896 - Invalid transaction paid in error

Delete a Reversed Transaction

User must be of type Transport Operator

User is viewing a Reversed Transaction with a status of "Pending"

Basic Flow

1. Click the "Delete Reversed Transaction" action link
2. Enter a reason
3. Click *Delete Reversal*
4. User is taken to the original transaction from which the Reversal was created
5. The Reversed Transaction is permanently deleted from Ridewise

The screenshot displays the Ridewise web application interface. At the top, the Ridewise logo and tagline are on the left, and the user's environment information (Welcome Phil Environment: Ridewise Role: Transport Operator Administrator) and utility links (Log Off, Help, Terms of Use) are on the right. The main heading is "Total Mobility Scheme" with a version number v 1.0.0. Below this is a navigation menu with options: Home, Transport Operators, Transactions, User Management, and Reports. A secondary menu includes Find Transactions, Find Invoices, Create Transaction, Create Invoice, and Upload Transactions. On the left, a "I want to..." sidebar contains links for "Add to Invoice", "Delete reversed transaction" (circled in red), and "Add followup note". The main content area is titled "Transaction Details" and shows information for transaction 180896-R. It is an "Electronic" transaction with a status of "Pending". The details are organized into three columns: Transport Operator (Kieran Jones Korbut), Client/Voucher details (Client Number: 5464, Surname: Thompson, First Name: Mark Richard), and Trip details (Trip Date: 7/06/2011, Pickup Location: UPPER HUTT (3:55 p.m.), Drop Off Location: UPPER HUTT (4:00 p.m.), Km's Travelled: 0.0 km's (0h 5m), Passengers: 1, Total Fare: -\$11.00, Concession: -\$5.50, Fare Paid: -\$5.50, Amt. to be Invoiced: -\$5.50). A "Transaction History" table at the bottom shows a single entry for 3/11/2011 at 3:47:54 p.m. by user tophl, with a status of "Pending" and a note: "Created as a reversal of transaction number 180896 - Invalid transaction paid in error".

Total Mobility Scheme

v 1.0.0

[Home](#) | [Transport Operators](#) | [Transactions](#) | [User Management](#) | [Reports](#)

[Find Transactions](#) | [Find Invoices](#) | [Create Transaction](#) | [Create Invoice](#) | [Upload Transactions](#)

I want to...

Transaction Details

Transaction Number:
180896-R

Transaction Type:
Electronic

Pending

Reversal of transaction
180896

Transport Operator:
Driver: **Kieran Jones Korbut**
Driver Number:
Vehicle Number:
Operator Trans Ref: **E1318160**

Trip Date: **7/06/2011**
Pickup Location: **UPPER HUTT (3:55 p.m.)**
Drop Off Location: **UPPER HUTT (4:00 p.m.)**
Km's Travelled: **0.0 km's (0h 5m)**
Passengers: **1**
Hoist Deployed: **No**

Delete Reversed Transaction

You have selected to delete this reverse transaction for transaction #180896.
Please enter a reason in the box below.*

Total Mobility Scheme

v 1.0.0

Home | Transport Operators | **Transactions** | User Management | Reports

[Find Transactions](#) | [Find Invoices](#) | [Create Transaction](#) | [Create Invoice](#) | [Upload Transactions](#)

I want to...

Reverse transaction
Add followup note

Transaction Details

Transaction Number:

180896

Transaction Type:

Electronic

Paid

Automatic

Transport Operator:

Driver: Kieran Jones Korbut

Driver Number:

Vehicle Number:

Operator Trans Ref: E1318160

Voucher/Entered Details

Client Number: 5464

Client Surname: Thompson

Client First Name: Mark Richard

Held Details

Client Number: 5464

Client Surname: Lumley **Mismatch**

Client First Name: Leonora Etienne **Mismatch**

Client Entitlement: Independent

Trip Date:

7/06/2011

Pickup Location:

UPPER HUTT (3:55 p.m.)

Drop Off Location:

UPPER HUTT (4:00 p.m.)

Km's Travelled:

0.0 km's (0h 5m)

Passengers:

1

Hoist Deployed:

No

Total Fare:

\$11.00

Concession:

\$5.50

Fare Paid:

\$5.50

Amount Invoiced:

\$5.50

Invoice Number:

Transaction History

Date	User	Status	Notes
3/11/2011 3:51:03 p.m.	tophil	Paid	A reversal transaction that was created for this transaction has been deleted. - Don't need this reversal after all
3/11/2011 3:47:54 p.m.	tophil	Paid	A reversal transaction for this transaction has been created. The reversal transaction number is 180900 - invalid transaction paid in error
9/08/2011 11:07:49 a.m.	gwrphil	Paid	Paid, SAP file created for invoice INDFE02

Create an Invoice

1. Click the “*Transactions*” tab
2. “*Search*” for the Transactions that you wish to Invoice
3. Once they have been returned, click the “*Invoice these Transactions*” link (Note: if you only want to add a couple of the Transactions in the view, you can click the select box next to each Transaction prior to clicking the “*Invoice these Transactions*” action
4. Enter the Invoice details under “*Create New Invoice*”
5. Click *Create*
6. The newly created Invoice is displayed
7. Clicking on View Transactions will take the user to the Transactions view with only the Transactions associated to that Invoice displayed

Welcome Pnll Environment: **Development Role: Transport Operator Administrator** [[Log Off](#)] [[Help](#)] [[Terms of Use](#)]

v 3.0.17067

Home Transport Operators Transactions User Management Reports

Find Transactions Find Invoices Create Transaction Upload Transactions

Search

Transaction Number

more search options
reset search

I want to...

Add followup note
Invoice these transactions
Void selected

Export this view
Export transactions

Search Results

Results for search [Financial Transactions] [Follow ups view](#)

5 entries match search criteria

	Trans #	Status	Trans Operator	Trip Date	Total Fare	Fare Paid	Concession	# Hotels	Invoice Number	Invoice Status
<input type="checkbox"/>	557852	PENDING	AIRPORT SHUTTLES (DUNEDIN)	28/02/2017	\$49.80	\$24.90	\$24.90	0		
<input type="checkbox"/>	557849	PENDING	AIRPORT SHUTTLES (DUNEDIN)	28/02/2017	\$55.00	\$30.00	\$25.00	0		
<input type="checkbox"/>	557847	PENDING	AIRPORT SHUTTLES (DUNEDIN)	28/02/2017	\$7.00	\$3.50	\$3.50	0		
<input type="checkbox"/>	557844	PENDING	AIRPORT SHUTTLES (DUNEDIN)	28/02/2017	\$11.00	\$5.50	\$5.50	0		
<input type="checkbox"/>	557842	PENDING	AIRPORT SHUTTLES (DUNEDIN)	28/02/2017	\$10.20	\$5.10	\$5.10	0		

First Previous 1 Next Last

Showing 1 to 5 of 5 entries
Show 20 entries

Eyede Solutions
PO Box 31012
Lower Hutt 5012

ridewise
TOTAL MOBILITY. TOTALLY MANAGED

Welcome Phil Environment: **Ridewise** Role: **Transport Operator Administrator** | [Log Out](#) | [Help](#) | [Terms of Use](#)

Total Mobility Scheme

v 1.0.0

Home | Transport Operators | **Transactions** | User Management | Reports

[Find Transactions](#) | [Find Invoices](#) | **Create Transaction** | [Create Invoice](#) | [Upload Transactions](#)

I want to...

No actions available

Add To Invoice

You have requested to add 4 transactions to an invoice for a total amount of \$71.50. Please Select an existing invoice, or create a new invoice.

Add to Existing Invoice

Select an existing Transport Operator Invoice number

Invoice Number*

Create New Invoice

Enter Transport Operator Invoice number

Invoice Number* Invoice Date*

Eyede NZ Ltd
PO Box 31012
Auckland 1142

ridewise

Welcome Phil Environment: **Ridewise** Role: **Transport Operator Administrator** | [Log Out](#) | [Help](#) | [Terms of Use](#)

Total Mobility Scheme

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Home | Transport Operators | **Transactions** | User Management | Reports

[Find Transactions](#) | [Find Invoices](#) | **Create Transaction** | [Create Invoice](#) | [Upload Transactions](#)

I want to...

Delete invoice

Submit invoice

Remove transactions

Add transactions

View transactions

Invoice Details

Invoice Number: INV005
Invoice Date: 3/11/2011
Current Status: 3/11/2011 4:04:56 p.m. tophl Pending Created

<input type="checkbox"/>	Trans #	Date	Transport Operator	Total Fare	Fare Paid	Concession	Concession Type	Hoist	Voucher/Ref	Op Trans ref
<input type="checkbox"/>	180920	2/11/2011	Co-operative Cab Company	\$30.00	\$15.00	\$15.00	Independent	No	123006	
<input type="checkbox"/>	180922	2/11/2011	Co-operative Cab Company	\$30.00	\$15.00	\$15.00	Independent	No	121212	
<input type="checkbox"/>	180926	1/10/2011	Co-operative Cab Company	\$20.00	\$10.00	\$10.00	Independent	Yes		E1323563
<input type="checkbox"/>	180924	1/07/2011	Co-operative Cab Company	\$20.00	\$10.00	\$10.00	Independent	Yes		E1321389

Show entries Showing 1 to 4 of 4 entries

Transactions	4		
Hoist Transactions	2	Hoist Rate (multiple)	
Concession Amounts:			
4 x Independent			\$50.00
Total Concession			\$50.00
Hoist Amount			\$21.50
Total Invoice			\$71.50

Last Modified by Phil Dyer on 3/11/2011 4:04:56 p.m.

Add Transactions to an existing Invoice

1. Search for the transactions you wish to allocate. Only *“Pending”* transactions can be allocated to an Invoice
2. Check the transactions that you wish to allocate and click the *“Add to Invoice”* action link
 - a. To select ALL transaction in all pages, click the link that appears above the Transactions view once any Transaction is selected
3. Select the Invoice from the drop down list under *“Add to Existing Invoice”*
4. Click *Add*
5. The updated Invoice is displayed containing the newly allocated transactions

The screenshot displays the 'Add To Invoice' form in the Ridewise application. The form is titled 'Add To Invoice' and contains two main sections: 'Add to Existing Invoice' and 'Create New Invoice'. In the 'Add to Existing Invoice' section, the 'Invoice Number' field is populated with 'INV005' and is circled in red. The 'Add' button is visible next to it. The 'Create New Invoice' section has empty fields for 'Invoice Number' and 'Invoice Date' with a 'Create' button. The page header shows 'Total Mobility Scheme' and navigation links like 'Home', 'Transport Operators', 'Transactions', 'User Management', and 'Reports'. The footer includes contact information for Eyede NZ Ltd and the Ridewise logo.

Home Transport Operators Transactions User Management Reports

Find Transactions Find Invoices Create Transaction Create Invoice Upload Transactions

I want to...

- Delete invoice
- Submit invoice
- Remove transactions
- Add transactions
- View transactions

Invoice Details

Invoice Number: INV005
Invoice Date: 3/11/2011
Current Status: 3/11/2011 4:04:56 p.m. tophill Pending Created

<input type="checkbox"/>	Trans #	Date	Transport Operator	Total Fare	Fare Paid	Concession	Concession Type	Hoist	Voucher/Ref	Op Trans ref
<input type="checkbox"/>	180926	2/11/2011	Co-operative Cab Company	\$30.00	\$15.00	\$15.00	Independent	No	123006	
<input type="checkbox"/>	180927	2/11/2011	Co-operative Cab Company	\$30.00	\$15.00	\$15.00	Independent	No	121212	
<input type="checkbox"/>	180926	1/10/2011	Co-operative Cab Company	\$20.00	\$10.00	\$10.00	Independent	Yes		E1323563
<input type="checkbox"/>	180924	1/07/2011	Co-operative Cab Company	\$20.00	\$10.00	\$10.00	Independent	Yes		E1321389
<input type="checkbox"/>	175779	31/05/2011	Co-operative Cab Company	\$10.60	\$5.30	\$5.30	Independent	No		E1260994
<input type="checkbox"/>	172215	10/05/2011	Co-operative Cab Company	\$7.60	\$3.80	\$3.80	Independent	No	1075095	1075095

Show 20 entries

Showing 1 to 6 of 6 entries

Transactions 6

Hoist Transactions 2 Hoist Rate (multiple)

Concession Amounts:	
6 x Independent	\$59.10
Total Concession	\$59.10
Hoist Amount	\$21.50
Total Invoice	\$80.60

Last Modified by Phil Dyer on 3/11/2011 4:04:56 p.m.

Remove a Transaction from an existing Invoice

The Invoice with a status of "Pending" or "Referred Back"

1. Check the transactions that you wish to remove from the Invoice
2. Click the "Remove transactions" action link
3. The Transactions are removed from the Invoice
4. The removed Transactions have a status of "Pending"
5. The updated Invoice is displayed

Home Transport Operators Transactions User Management Reports

Find Transactions Find Invoices Create Transaction Create Invoice Upload Transactions

I want to...

Delete invoice

Submit invoice

Remove transactions

Add transactions

View transactions

Invoice Details

Invoice Number: INV005
 Invoice Date: 3/11/2011
 Current Status: 3/11/2011 4:04:56 p.m. tophil Pending Created

Trans #	Date	Transport Operator	Total Fare	Fare Paid	Concession	Concession Type	Hoist	Voucher/Ref	Op Trans ref
<input type="checkbox"/> 180928	2/11/2011	Co-operative Cab Company	\$30.00	\$15.00	\$15.00	Independent	No	123006	
<input type="checkbox"/> 180927	2/11/2011	Co-operative Cab Company	\$30.00	\$15.00	\$15.00	Independent	No	121212	
<input checked="" type="checkbox"/> 180926	1/10/2011	Co-operative Cab Company	\$20.00	\$10.00	\$10.00	Independent	Yes		E1323563
<input type="checkbox"/> 180924	1/07/2011	Co-operative Cab Company	\$20.00	\$10.00	\$10.00	Independent	Yes		E1321389
<input type="checkbox"/> 175779	31/05/2011	Co-operative Cab Company	\$10.60	\$5.30	\$5.30	Independent	No		E1260994
<input type="checkbox"/> 172215	10/05/2011	Co-operative Cab Company	\$7.60	\$3.80	\$3.80	Independent	No	1075095	1075095

Show 20 entries Showing 1 to 6 of 6 entries

Transactions	6		Concession Amounts:	
			6 x Independent	\$59.10
			Total Concession	\$59.10
Hoist Transactions	2	Hoist Rate (multiple)	Hoist Amount	\$21.50
			Total Invoice	\$80.60

Last Modified by Phil Dyer on 3/11/2011 4:04:56 p.m.

Total Mobility Scheme

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Home Transport Operators **Transactions** User Management Reports

[Find Transactions](#) [Find Invoices](#) [Create Transaction](#) [Create Invoice](#) [Upload Transactions](#)

I want to...

- Delete invoice
- Submit invoice
- Remove transactions
- Add transactions
- View transactions

Invoice Details

Invoice Number: INV005
Invoice Date: 3/11/2011
Current Status: 3/11/2011 4:04:56 p.m. tophil Pending Created

<input type="checkbox"/>	<input type="checkbox"/>	Trans #	Date	Transport Operator	Total Fare	Fare Paid	Concession	Concession Type	Hoist	Voucher/Ref	Op Trans ref
<input type="checkbox"/>	<input type="checkbox"/>	180920	2/11/2011	Co-operative Cab Company	\$30.00	\$15.00	\$15.00	Independent	No	123006	
<input type="checkbox"/>	<input type="checkbox"/>	180922	2/11/2011	Co-operative Cab Company	\$30.00	\$15.00	\$15.00	Independent	No	121212	
<input type="checkbox"/>	<input type="checkbox"/>	180924	1/07/2011	Co-operative Cab Company	\$20.00	\$10.00	\$10.00	Independent	Yes		E1321389
<input type="checkbox"/>	<input type="checkbox"/>	175779	31/05/2011	Co-operative Cab Company	\$10.60	\$5.30	\$5.30	Independent	No		E1266994
<input type="checkbox"/>	<input type="checkbox"/>	172215	10/05/2011	Co-operative Cab Company	\$7.60	\$3.80	\$3.80	Independent	No	1075095	1075095

Show 20 entries Showing 1 to 5 of 5 entries

Transactions 5

Hoist Transactions 1

Concession Amounts:	
5 x Independent	\$49.10
Total Concession	\$49.10
Hoist Amount	\$10.00
Total Invoice	\$59.10

Delete an Invoice

The Invoice must have a status of “Pending” or “Referred Back”

1. Click the “Delete Invoice” action link
2. A warning message is displayed
3. Click *Delete*
4. The Invoice is permanently deleted from Ridewise
5. The Transactions are removed from the Invoice
6. The removed Transactions have a status of “Pending”
7. The default Invoices view is displayed

Welcome Phil Environment: **Ridewise** Role: **Transport Operator Administrator** | [Log Out](#) | [Help](#) | [Terms of Use](#)

ridewise
TOTAL MOBILITY. TOTALLY MANAGED

Total Mobility Scheme

v 1.0.0

Home | Transport Operators | **Transactions** | User Management | Reports

Find Transactions | Find Invoices | Create Transaction | Create Invoice | Upload Transactions

I want to...

- Delete invoice**
- Submit invoice
- Remove transactions
- Add transactions
- View transactions

Invoice Details

Invoice Number: INV005
 Invoice Date: 3/11/2011
 Current Status: 3/11/2011 4:04:56 p.m. tophil Pending Created

Trans #	Date	Transport Operator	Total Fare	Fare Paid	Concession	Concession Type	Hoist	Voucher/Ref	Op Trans ref
180920	2/11/2011	Co-operative Cab Company	\$30.00	\$15.00	\$15.00	Independent	No	123006	
180922	2/11/2011	Co-operative Cab Company	\$30.00	\$15.00	\$15.00	Independent	No	121212	
180924	1/07/2011	Co-operative Cab Company	\$20.00	\$10.00	\$10.00	Independent	Yes		E1321389
175779	31/05/2011	Co-operative Cab Company	\$10.60	\$5.30	\$5.30	Independent	No		E1266994
172215	10/05/2011	Co-operative Cab Company	\$7.60	\$3.80	\$3.80	Independent	No	1075095	1075095

Show 20 entries Showing 1 to 5 of 5 entries

Transactions	5		
Hoist Transactions	1	Hoist Rate (\$10)	
		Concession Amounts:	
		5 x Independent	\$49.10
		Total Concession	\$49.10
		Hoist Amount	\$10.00
		Total Invoice	\$59.10

ridewise
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Welcome Phil Environment: **Ridewise** Role: **Transport Operator Administrator** | [Log Out](#) | [Help](#) | [Terms of Use](#) v 1.0.0

Total Mobility Scheme

Home Transport Operators **Transactions** User Management Reports

[Find Transactions](#) | [Find Invoices](#) | [Create Transaction](#) | [Create Invoice](#) | [Upload Transactions](#)

I want to...

View transactions

Invoice Details


Invoice Number:	INV005
Invoice Date:	3/11/2011

Delete Invoice

You have selected to delete this invoice.
All associated transactions will be unallocated.

Last Modified by Phil Oyer on 3/11/2011 4:04:56 p.m.

Eyede NZ Ltd
PO Box 31012
Lower Hutt 5012
☎ +64 4 939 8764



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Submit an Invoice

The Invoice must have a status of “Pending” or “Referred Back”

1. Click the “Submit Invoice” action link
2. The Invoice status is “Awaiting Approval”
3. The Transactions allocated to the Invoice have a status of “Awaiting Approval”

Welcome Phil Environment: **Ridewise** Role: **Transport Operator Administrator** | [Log Out](#) | [Help](#) | [Terms of Use](#)

ridewise
TOTAL MOBILITY. TOTALLY MANAGED

Total Mobility Scheme

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Home | Transport Operators | **Transactions** | User Management | Reports

[Find Transactions](#) | [Find Invoices](#) | [Create Transaction](#) | [Create Invoice](#) | [Upload Transactions](#)

I want to...

- Delete invoice
- Submit invoice**
- Remove transactions
- Add transactions
- View transactions

Invoice Details

Invoice Number: INV005
Invoice Date: 3/11/2011
Current Status: Pending Created
 3/11/2011 4:04:56 p.m. tophil

Trans #	Date	Transport Operator	Total Fare	Fare Paid	Concession	Concession Type	Hoist	Voucher/Ref	Op Trans ref
180923	2/11/2011	Co-operative Cab Company	\$30.00	\$15.00	\$15.00	Independent	No	123006	
180927	2/11/2011	Co-operative Cab Company	\$30.00	\$15.00	\$15.00	Independent	No	121212	
180924	1/07/2011	Co-operative Cab Company	\$20.00	\$10.00	\$10.00	Independent	Yes		E1321389
175779	31/05/2011	Co-operative Cab Company	\$10.60	\$5.30	\$5.30	Independent	No		E1266994
172215	10/05/2011	Co-operative Cab Company	\$7.60	\$3.80	\$3.80	Independent	No	1075095	1075095

Show 20 entries Showing 1 to 5 of 5 entries

Transactions	5	Concession Amounts:	
		5 x Independent	\$49.10
		Total Concession	\$49.10
Hoist Transactions	1	Hoist Rate (\$10)	
		Hoist Amount	\$10.00
		Total Invoice	\$59.10

Total Mobility Scheme

v 1.0.0

Home Transport Operators Transactions User Management Reports

Find Transactions Find Invoices Create Transaction Create Invoice Upload Transactions

I want to...

- Un-submit invoice
- View transactions

Invoice Details

Invoice Number: INV005
Invoice Date: 3/11/2011
Current Status: 4/11/2011 2:53:40 p.m. tophil Awaiting Approval Submitted for payment approval
[History \(1\)](#)

Trans #	Date	Transport Operator	Total Fare	Fare Paid	Concession	Concession Type	Hoist	Voucher/Ref	Op Trans ref
180928	2/11/2011	Co-operative Cab Company	\$30.00	\$15.00	\$15.00	Independent	No	123006	
180927	2/11/2011	Co-operative Cab Company	\$30.00	\$15.00	\$15.00	Independent	No	121212	
180924	1/07/2011	Co-operative Cab Company	\$20.00	\$10.00	\$10.00	Independent	Yes		E1321389
175779	31/05/2011	Co-operative Cab Company	\$10.60	\$5.30	\$5.30	Independent	No		E1266994
122216	10/05/2011	Co-operative Cab Company	\$7.60	\$3.80	\$3.80	Independent	No	1075095	1075095

Show 20 entries Showing 1 to 5 of 5 entries

Transactions	5	Concession Amounts:	
		5 x Independent	\$49.10
		Total Concession	\$49.10
Hoist Transactions	1	Hoist Amount	\$10.00
		Total Invoice	\$59.10

Un-Submit an Invoice

The Invoice must have a status of *“Awaiting Approval”*

1. Click the *“Un-Submit Invoice”* action link
2. The Invoice status is *“Pending”*
3. The Transactions allocated to the Invoice have a status of *“Allocated”*

The screenshot shows the 'Total Mobility Scheme' interface. At the top, there is a navigation bar with 'Home', 'Transport Operators', 'Transactions', 'User Management', and 'Reports'. Below this is a sub-navigation bar with 'Find Transactions', 'Find Invoices', 'Create Transaction', 'Create Invoice', and 'Upload Transactions'. On the left, there is a 'I want to...' menu with 'Un-submit invoice' circled in red. The main content area is titled 'Invoice Details' and shows the following information:

Invoice Number: INV005
Invoice Date: 3/11/2011
Current Status: 4/11/2011 2:53:40 p.m. tophil Awaiting Approval Submitted for payment approval
[History \(1\):](#)

Trans #	Date	Transport Operator	Total Fare	Fare Paid	Concession	Concession Type	Hoist	Voucher/Ref	Op Trans ref
180926	2/11/2011	Co-operative Cab Company	\$30.00	\$15.00	\$15.00	Independent	No	123006	
180927	2/11/2011	Co-operative Cab Company	\$30.00	\$15.00	\$15.00	Independent	No	121212	
180924	1/07/2011	Co-operative Cab Company	\$20.00	\$10.00	\$10.00	Independent	Yes		E1921389
175779	31/05/2011	Co-operative Cab Company	\$10.60	\$5.30	\$5.30	Independent	No		E1266994
172215	10/05/2011	Co-operative Cab Company	\$7.60	\$3.80	\$3.80	Independent	No	1075095	1075095

Below the table, there is a summary section:

Transactions	5		
Hoist Transactions	1	Hoist Rate (\$10)	

Summary of amounts:

Concession Amounts:	
5 x Independent	\$49.10
Total Concession	\$49.10
Hoist Amount	\$10.00
Total Invoice	\$59.10

Approve an Invoice (Council only)

The Invoice must have a status of "Awaiting Approval"

1. Click the "Approve for Payment" action link
2. The Invoice status is "Approved"
3. The Transactions allocated to the Invoice have a status of "Approved"

The screenshot shows the 'Total Mobility Scheme' interface. At the top, there is a navigation bar with links for Home, Clients, Agencies, Transport Operators, Transactions, User Management, Reports, and Settings. Below this is a sub-navigation bar with 'Find Transactions', 'Find Invoices', and 'View SAP Files'. The main content area is titled 'Invoice Details' and shows the following information:

- Invoice Number:** INV005
- Invoice Date:** 3/11/2011
- Current Status:** 4/11/2011 2:53:40 p.m. tophil Awaiting Approval Submitted for payment approval
- [History \(1\)](#)

On the left side, there is a 'I want to...' menu with three options: 'Approve for payment' (circled in red), 'Refer Invoice Back', and 'View transactions'.

Below the invoice details is a table of transactions:

Trans #	Date	Transport Operator	Client Number	Total Fare	Fare Paid	Concession	Concession Type	Hoist	Voucher/Ref	Op Trans ref
180928	2/11/2011	Co-operative Cab Company	941	\$30.00	\$15.00	\$15.00	Independent	No	123006	
180927	2/11/2011	Co-operative Cab Company	11545	\$30.00	\$15.00	\$15.00	Independent	No	121212	
180924	1/07/2011	Co-operative Cab Company	8836	\$20.00	\$10.00	\$10.00	Independent	Yes		E1321389
175779	31/05/2011	Co-operative Cab Company	360	\$10.60	\$5.30	\$5.30	Independent	No		E126894
172215	10/05/2011	Co-operative Cab Company	3197	\$7.60	\$3.80	\$3.80	Independent	No	1075095	1075095

Below the table, there is a summary section:

Transactions	5		
Hoist Transactions	1	Hoist Rate (\$10)	

On the right side, there is a 'Concession Amounts' summary:

Concession Amounts:	
5 x Independent	\$49.10
Total Concession	\$49.10
Hoist Amount	\$10.00
Total Invoice	\$59.10

Total Mobility Scheme

v 1.0.0

Home Clients Agencies Transport Operators **Transactions** User Management Reports Settings

[Find Transactions](#) | [Find Invoices](#) | [View SAP Files](#)

I want to...

- Mark as paid
- Cancel invoice approval
- View transactions

Invoice Details

Invoice Number: INV005
Invoice Date: 3/11/2011
Current Status: 4/11/2011 2:58:12 p.m. gwrcphil Approved Approved for payment
[History \(2\)](#)

Trans #	Date	Transport Operator	Client Number	Total Fare	Fare Paid	Concession	Concession Type	Hoist	Voucher/Ref	Op Trans ref
180928	2/11/2011	Co-operative Cab Company	941	\$30.00	\$15.00	\$15.00	Independent	No	123005	
180927	2/11/2011	Co-operative Cab Company	11545	\$30.00	\$15.00	\$15.00	Independent	No	121212	
180924	1/07/2011	Co-operative Cab Company	8836	\$20.00	\$10.00	\$10.00	Independent	Yes		E1321389
175779	31/05/2011	Co-operative Cab Company	360	\$10.60	\$5.30	\$5.30	Independent	No		E1266994
172215	10/05/2011	Co-operative Cab Company	3197	\$7.60	\$3.80	\$3.80	Independent	No	1075095	1075095

Show entries Showing 1 to 5 of 5 entries

Transactions	5	Concession Amounts:	
		5 x Independent	\$49.10
		Total Concession	\$49.10
Hoist Transactions	1	Hoist Amount	\$10.00
		Total Invoice	\$59.10

Refer an Invoice back to the Transport Operator (Council only)

The Invoice must have a status of "Awaiting Approval"

1. Click the "Refer Back Invoice" action link
2. Add a note
3. Click Save
4. The Invoice status is "Referred Back"
5. The Transactions allocated to the Invoice have a status of "Allocated"

The screenshot shows the Ridewise web application interface. At the top, there is a navigation bar with the Ridewise logo and the text 'TOTAL MOBILITY. TOTALLY MANAGED'. On the right, it says 'Welcome GWRCPhill Environment: Ridewise Role: Council Administrator | Log Out | Help | Terms of Use | v 1.0.0'. Below this is a main navigation menu with 'Home', 'Clients', 'Agencies', 'Transport Operators', 'Transactions', 'User Management', 'Reports', and 'Settings'. Under 'Transactions', there are sub-links for 'Find Transactions', 'Find Invoices', and 'View SAP Files'. On the left, there is a 'I want to...' sidebar with options: 'Approve for payment', 'Refer invoice back' (highlighted with a red circle), and 'View transactions'. The main content area is titled 'Invoice Details' and shows the following information:

Invoice Number: TM 12
Invoice Date: 6/06/2011
Current Status: 6/06/2011 10:50:25 a.m. ARyan Awaiting Approval Submitted for payment approval
[History \(1\):](#)

Trans #	Date	Transport Operator	Client Number	Total Fare	Fare Paid	Concession	Concession Type	Holist	Voucher/Ref	Op Trans ref
175090	30/05/2011	Independent Taxis	2056	\$10.00	\$5.00	\$5.00	Independent	No		E1256234
175077	30/05/2011	Independent Taxis	380	\$7.00	\$3.50	\$3.50	Independent	No		E1256343
175008	31/05/2011	Independent Taxis	380	\$5.00	\$2.50	\$2.50	Independent	No		E1258181
174995	31/05/2011	Independent Taxis	1577	\$10.00	\$5.00	\$5.00	Independent	No		E1259096
174985	31/05/2011	Independent Taxis	445	\$11.00	\$5.50	\$5.50	Independent	No		E1259468
174950	31/05/2011	Independent Taxis	2301	\$17.00	\$8.50	\$8.50	Independent	No		E1260293
174928	31/05/2011	Independent Taxis	10929	\$12.60	\$6.30	\$6.30	Independent	No		E1260657
174913	31/05/2011	Independent Taxis	10401	\$8.00	\$4.00	\$4.00	Independent	No		E1260820
174799	31/05/2011	Independent Taxis	3550	\$6.60	\$3.30	\$3.30	Independent	No		E1261682
174770	31/05/2011	Independent Taxis	6835	\$11.50	\$5.75	\$5.75	Independent	No		E1261834
174749	31/05/2011	Independent Taxis	545	\$16.00	\$8.00	\$8.00	Independent	No		E1261971

ridewise TOTAL MOBILITY. TOTALLY MANAGED

Welcome GWRCPhit Environment: **Ridewise** Role: **Council Administrator** | [Log Out](#) | [Help](#) | [Terms of Use](#) v 1.0.0

Total Mobility Scheme

Home Clients Agencies Transport Operators **Transactions** User Management Reports Settings

Find Transactions Find Invoices View SAP Files

I want to...

No actions available

Refer Invoice Back

You have requested to refer invoice back to transport operator .

Status
Referred back

Notes*

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ridewise
TOTAL MOBILITY. TOTALLY MANAGED

Total Mobility Scheme

v 1.0.0

Home Clients Agencies Transport Operators Transactions User Management Reports Settings

[Find Transactions](#) | [Find Invoices](#) | [View SAP Files](#)

I want to...

[View transactions](#)

Invoice Details

Invoice Number: TM 12
Invoice Date: 6/06/2011

Current Status: 4/11/2011 3:01:07 p.m. gwrcphil Referred back Please fix all flagged transactions
[History \(2\)](#)

<input type="checkbox"/>	<input type="checkbox"/>	Trans #	Date	Transport Operator	Client Number	Total Fare	Fare Paid	Concession	Concession Type	Holst	Voucher/Ref	Op Trans ref
<input type="checkbox"/>	<input checked="" type="checkbox"/>	175090	30/05/2011	Independent Taxis	2056	\$10.00	\$5.00	\$5.00	Independent	No		E1256234
<input type="checkbox"/>	<input checked="" type="checkbox"/>	175077	30/05/2011	Independent Taxis	380	\$7.00	\$3.50	\$3.50	Independent	No		E1256343
<input type="checkbox"/>	<input checked="" type="checkbox"/>	175008	31/05/2011	Independent Taxis	380	\$5.00	\$2.50	\$2.50	Independent	No		E1258181
<input type="checkbox"/>	<input checked="" type="checkbox"/>	174995	31/05/2011	Independent Taxis	1577	\$10.00	\$5.00	\$5.00	Independent	No		E1259096
<input type="checkbox"/>	<input checked="" type="checkbox"/>	174885	31/05/2011	Independent Taxis	445	\$11.00	\$5.50	\$5.50	Independent	No		E1259468
<input type="checkbox"/>	<input checked="" type="checkbox"/>	174950	31/05/2011	Independent Taxis	2301	\$17.00	\$8.50	\$8.50	Independent	No		E1260293
<input type="checkbox"/>	<input checked="" type="checkbox"/>	174928	31/05/2011	Independent Taxis	10929	\$12.60	\$6.30	\$6.30	Independent	No		E1260657
<input type="checkbox"/>	<input checked="" type="checkbox"/>	174913	31/05/2011	Independent Taxis	10401	\$8.00	\$4.00	\$4.00	Independent	No		E1260820
<input type="checkbox"/>	<input checked="" type="checkbox"/>	174799	31/05/2011	Independent Taxis	3550	\$6.60	\$3.30	\$3.30	Independent	No		E1261682
<input type="checkbox"/>	<input checked="" type="checkbox"/>	174770	31/05/2011	Independent Taxis	6835	\$11.50	\$5.75	\$5.75	Independent	No		E1261834
<input type="checkbox"/>	<input checked="" type="checkbox"/>	174743	31/05/2011	Independent Taxis	545	\$16.00	\$8.00	\$8.00	Independent	No		E1261971

Reports

Viewing a Report

Pre-conditions

None

Post-conditions

The report is downloaded in Excel format

Basic Flow

1. Click the "Reports" tab
2. Click on the name of the report you wish to view
3. Enter any required parameters
4. Click "Download"
5. The report will run and will download automatically to your PC. Note: Some browsers will prompt you to Save or Open the report, others will simply Save the report to your Downloads folder.
6. Open the report in Excel to view

Report List

Clients

[Client Age Report](#)

Transactions

Transaction and Hoist Count By Client Id Report

From	<input type="text" value="08/07/2014"/>	<input type="button" value="Download"/>
To	<input type="text" value="08/07/2015"/>	

[Transaction Count By Operator](#)

[Transaction Count By Type](#)

[Transactions By Invoice](#)

Other Functions

View Ridewise Help

1. Click the “[Help](#)” link in the top right hand of the screen
2. The Help File is displayed in a new browser window or downloaded (depending on browser settings)

Note: The Help files themselves cannot be modified via the Ridewise system

View Terms of Use

1. Click the “[Terms of Use](#)” link in the top right hand of the screen
2. The Terms of Use are displayed in a new browser window

Note: The Terms of Use file cannot be modified via the Ridewise system.

The screenshot shows the Ridewise web application interface. At the top, there is a header with the Ridewise logo and the text 'TOTAL MOBILITY. TOTALLY MANAGED'. To the right, it says 'Welcome GWRCPhil Environment. Ridewise Role: Council Administrator | Log Out | [Help](#) | [Terms of Use](#)'. Below the header is a navigation menu with links: Home, Clients, Agencies, Transport Operators, Transactions, User Management, Reports, Settings. The main content area is titled 'Total Mobility Scheme' and includes a sidebar on the left with 'I want to...' filters for Clients, Assessments, Reassessments, and Invoices. The main table is titled 'Reassessments - overdue' and contains a list of client records with columns: Client Number, First Names, Surname, Suburbs, Post Code, Has Photo, Agency, Assessment Date, and Ass.

Client Number	First Names	Surname	Suburbs	Post Code	Has Photo	Agency	Assessment Date	Ass
11278	Cordelia Nathalie	Kojak		4915	Yes	Disability Information and Equipment Centre Kapiti	4/05/2011	App
11249	Jessica Aileen	Jagger	Newtown	4917	Yes	Disability Information and Equipment Centre Kapiti	2/05/2011	App
11217	Brian Bertrand	Darwin		5415	Yes	WELLINGTON REGIONAL COUNCIL	26/04/2011	App
11210	Clarence	Bolan	Miramar	5512	Yes	WELLINGTON REGIONAL COUNCIL	27/04/2011	App
11205	Celine Sally	McQueen		4915	Yes	Disability Information and Equipment Centre Kapiti	18/04/2011	App
11170	Damian	Robert		5818	Yes	Disability Information and Equipment Centre Kapiti	18/04/2011	App
11103	Jason Louis	Yarrow		5718	Yes	Disability Information and Equipment Centre Kapiti	7/04/2011	App
11087	Isaac Constant	Ironside	Aotea	6011	Yes	WOOPS Wairarapa Organisation for Older Persons	31/03/2011	App
11084	Brian Bob	Windham		5718	Yes	Stroke Foundation - Central	31/03/2011	App
11081	Ryan Paul	Leroy		5918	Yes	Disability Information and Equipment Centre Kapiti	4/04/2011	App
11056	Cyril Meredith	Ingleson		5718	Yes	Disability Information and Equipment Centre Kapiti	25/03/2011	App
11053	Hector Rock	Gekko		5718	Yes	Disability Information and Equipment Centre Kapiti	24/03/2011	App
11041	Winifred Magdalene	Brown		5918	Yes	Disability Information and Equipment Centre Kapiti	24/03/2011	App
11038	Reynold	Robert	Cannon's Creek	5416	Yes	Disability Information and Equipment Centre Kapiti	29/03/2011	App
11030	Lily Bridget	Murcheson		5818	Yes	Disability Information and Equipment Centre Kapiti	31/03/2011	App
11029	Minna Denise	Farmer		4915	Yes	Disability Information and Equipment Centre Kapiti	27/04/2011	App
11025	Theresa	Wells		4615	Yes	WELLINGTON REGIONAL COUNCIL	25/05/2011	App

Export Data Views

Pre-conditions

The user is currently in a data view that can be exported

Post-conditions

Basic Flow

1. Click the “Export This View” action link
2. Select whether to Open or Save the file
 - a. If Save, browse to the desired save location
 - b. Click Save
 - c. Data contained within the view is exported and either viewed or saved as a csv file

Else

- a. Click Open

The screenshot shows the 'Total Mobility Scheme' web application interface. At the top, there is a navigation bar with links for Home, Clients, Agencies, Transport Operators, Transactions, User Management, Reports, and Settings. Below this is a search bar with 'Find Clients' and 'Create Client' buttons. The main content area displays a table of search results for 'All clients'. The table has columns for Client Number, First Names, Surname, Status, Entitlement, Next Review Date, Date of Birth, Street Address, Suburb, and Agency. The 'Export this view' button is circled in red in the left-hand sidebar.

Client Number	First Names	Surname	Status	Entitlement	Next Review Date	Date of Birth	Street Address	Suburb	Agency
8804	Lulu Gladys	Vincent	Active			22/10/1962	450-7103 Vestibulum, Street	Miramar	Idon Sr
9180	Georgia Lulu	Asimov	Suspended			28/03/1961	3730 Porta Road	Newtown	WELLI
9248	Virginia Sibyl	Harrison	Suspended			11/01/1946	545 Sed Ave		WELLI
9279	Cajetan Dewey	Perrot	Suspended			27/12/1925	457-4023 Ante, Ave	Bellmont Hills	Disabi
9309	Gemma Leah	David	Suspended			27/09/1924	Ap #866-6047 Egestas, Ave		WELLI
9425	Conan Martin	White	Suspended			23/11/1935	314-2859 Accumsan Ave		WELLI
9521	Lionel	Williams	Suspended			17/05/1953	6018 Nisi Avenue		WELLI
9556	Lucille Harriet	Yarrow	Suspended			30/06/1981	3072 Consectetur St.		WELLI
9930	Rosalind Candida	Johnson	Suspended			14/10/1927	320-9975 Sollicitudin Street	Brooklyn	Disabi
9939	Everett Neil	Martin	Active			24/03/1985	8626 Lorem Ave	Eastbourne	WELLI
10086	Isaac Percival	Taylor	Suspended			17/07/1967	2951 Nulla, Av.	Titahi Bay	WELLI
10203	Otto Basil	Garcia	Active			30/11/1944	3325 Euismod Rd.	Titahi Bay	WELLI
10310	Humphry Yves	Doherty	Active			5/11/1929	4317 Natoque Rd.	Miramar	Stroke
10364	Fergus Ryan	Vincent	Active			15/09/1968	1009 Aliquam Rd.	Cannon's Creek	Kapiti C
10455	Gail Alicia	Norton	Suspended			6/02/1955	8090 Eit, Rd.	Brooklyn	WELLI

Note: The Transaction views have a unique action called “Export Transactions”. This works in the same way as Export this view, except it exports the Transactions in the same format as required by Transport Operators to upload transactions, making it very simple for Transport Operators to export, modify, then re-upload any transactions that they may need to void/modify.

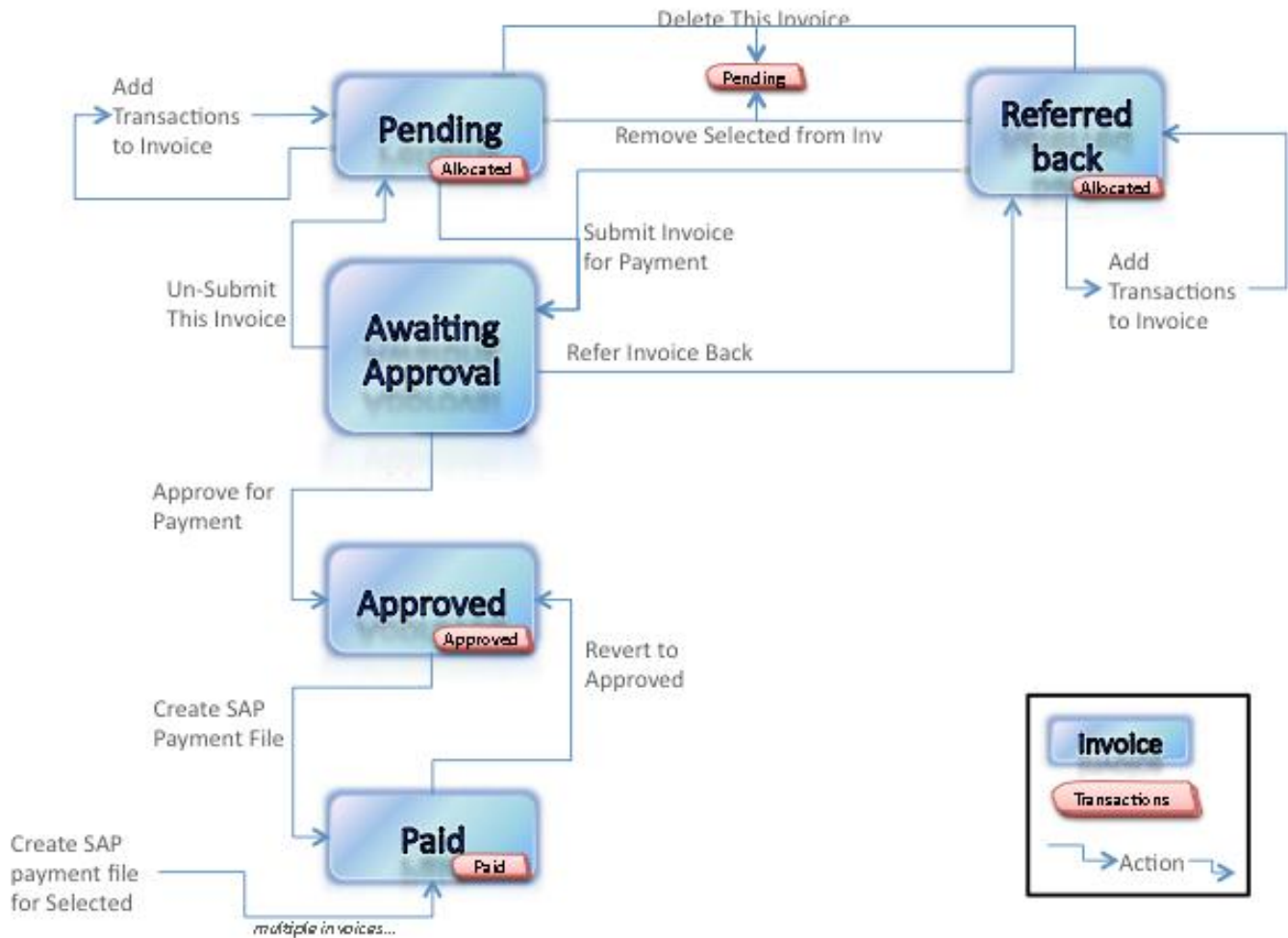
Status Flow

Various entities within Ridewise utilize status to indicate position in lifecycle and determine available actions. This section details the various status's of applicable entities and provides some information as to what each status indicates.

Invoices and Transactions

Transactions have a status that is independent of, but tied to the status of an Invoice once the transaction has been allocated to an Invoice. The following diagram details the various statuses of Invoices and Transactions, and the actions that trigger the change of status.

A Transaction has an opening status of Pending, and remains at this status until allocated to an Invoice, at which point it becomes Allocated.



Dashboard

For most users of Ridewise, the Dashboard is the default landing or home page they see when they first log on to the system, and is available under the “Home” tab. The Dashboard is a collection of views containing entities that meet specific criteria. It is intended as a ‘quick look’ mechanism allowing users to quickly view any items requiring action.

Each Dashboard item displays a name and the number of records that meet the preset criteria in brackets alongside. Clicking on the name will display the records in the primary view whilst retaining the Dashboard navigation, allowing users to quickly jump from one Dashboard view to another.

The screenshot shows the Ridewise Total Mobility Scheme dashboard. At the top, there is a navigation bar with tabs: Home, Clients, Agencies, Transport Operators, Transactions, User Management, Reports, and Settings. Below the navigation bar, there is a sidebar on the left with a 'I want to...' section containing categories like Clients, Assessments, Reassessments, and Invoices, each with a count in brackets. The main content area displays a table titled 'Reassessments - overdue' with columns: Client Number, First Names, Surname, Suburb, Post Code, Has Photo, Agency, Assessment Date, and Ass.

Client Number	First Names	Surname	Suburb	Post Code	Has Photo	Agency	Assessment Date	Ass
11270	Cordelia Nathalie	Kojak		4915	Yes	Disability Information and Equipment Centre Kapiti	4/05/2011	App
11249	Jessica Aileen	Jagger	Newtown	4917	Yes	Disability Information and Equipment Centre Kapiti	2/05/2011	App
11217	Brian Bertrand	Darwin		5415	Yes	WELLINGTON REGIONAL COUNCIL	26/04/2011	App
11210	Clarence	Bolan	Miramar	5512	Yes	WELLINGTON REGIONAL COUNCIL	27/04/2011	App
11205	Celine Sally	McQueen		4915	Yes	Disability Information and Equipment Centre Kapiti	18/04/2011	App
11170	Damian	Robert		5818	Yes	Disability Information and Equipment Centre Kapiti	18/04/2011	App
11103	Jason Louis	Yarrow		5718	Yes	Disability Information and Equipment Centre Kapiti	7/04/2011	App
11087	Isaac Constant	Ironside	Aotea	6011	Yes	WOOPS Wairapa Organisation for Older Persons	31/03/2011	App
11084	Brian Bob	Windham		5718	Yes	Stroke Foundation - Central	31/03/2011	App
11081	Ryan Paul	Leroy		5918	Yes	Disability Information and Equipment Centre Kapiti	4/04/2011	App
11056	Cyrl Meredith	Ingleson		5718	Yes	Disability Information and Equipment Centre Kapiti	25/03/2011	App
11053	Hector Rock	Gekko		5718	Yes	Disability Information and Equipment Centre Kapiti	24/03/2011	App
11041	Winifred Magdalene	Brown		5918	Yes	Disability Information and Equipment Centre Kapiti	24/03/2011	App
11030	Reynold	Robert	Cannon's Creek	5416	Yes	Disability Information and Equipment Centre Kapiti	29/03/2011	App
11030	Lilly Bridget	Murcheson		5818	Yes	Disability Information and Equipment Centre Kapiti	31/03/2011	App
11029	Minna Denise	Farmer		4915	Yes	Disability Information and Equipment Centre Kapiti	27/04/2011	App
11000	Theresa	YDell		4915	Yes	WELLINGTON REGIONAL COUNCIL	25/05/2011	App

The following describes the criteria set out for each of the Dashboard views.

Invoices	
Awaiting Payment	Invoices with a status of ‘Approved’
Requiring Approval	Invoices with a status of ‘Awaiting Approval’
Pending or Referred Back	Invoices with a status of ‘Pending’ or ‘Referred Back’
Transactions	

Follow ups	Transactions that have been Flagged for Followup (System & Manually)
Invoiced Last 60 Days	Transactions that have been invoiced in the last 60 days, regardless of Transaction or Invoice status

Transaction Flagging Rules

Transactions are automatically flagged upon entering Ridewise, in accordance with the following business rules. In the majority of cases, the following rules will cause Transactions to be Flagged however some cases will cause the file to be Rejected. These are noted.

1. Pickup Location (Start Location) is missing - Rejected
2. Dropoff Location (End Location) is missing - Rejected
3. Driver is Suspended (Licence Number lookup) (The suspension is determined from the date the Transactions occurs)
4. Driver record does not exist in System (Licence Number lookup). NOTE: If a Driver record is added that matches the missing driver record for previously flagged transactions, that flag reason will be automatically removed from these transactions
5. Vehicle is Suspended (Fleet Number lookup) (The suspension is determined from the date the Transactions occurs)
6. Vehicle record does not exist in System (Fleet Number lookup) NOTE: If a Vehicle record is added that matches the missing vehicle record for previously flagged transactions, that flag reason will be automatically removed from these transactions
7. Transport Operator is Suspended (The suspension is determined from the date the Transactions occurs)
8. Invalid Concession Amount
 - i. Calculated Concession <> Fare Discount (Concession amount entered for transaction)
Note: Ignores 6 cent variances

Calculated Concession Formula

Concession Percent

Supported: 100%

Independent, Independent Supported, Hospice: 50%

Taxi Fare (and anything else): 0%

Calculated Concession = Total Fare * Concession Percent /100

If Concession > \$40 and Concession Type <> Supported

Then Calculated Concession = \$40

9. Invalid Fare Total

Formula: Fare Total <> Fare Discount + Fair Paid

Note: Ignores 6 cent variances

10. Vehicle Hoist Anomaly

Hoist is used and Vehicle (Fleet Number) is not hoist capable

11. Client Hoist Anomaly

Hoist is used and Client is not hoist user. Note: This exception is FLAGGED for all transaction input methods; i.e. Manual and csv entries will be flagged but not rejected as a result of this exception

12. Client ID for manual backup transactions (i.e. where GW/ARTA card not worked)

Note: Does not apply to voucher no.s start with "491" and contain a total of 9 digits

13. Client is Suspended (This rule should only apply to manual and csv transactions, as the Client will not be able to use their card in-taxi when they are suspended. The suspension is determined from the date the Transaction occurs. The Transaction is FLAGGED ONLY; i.e. accepted and flagged, not rejected)

14. Start Time is missing - Rejected

15. Region Name is missing - Rejected

16. Client ID must accept intergers only and up to 10 digits - Rejected

17. Voucher Number must accept integers only and up to 10 digits - Rejected

18. End Time must be no more than 12 hours after start time.

19. Start location must be at least 3 characters - Rejected

20. End location must be at least 3 characters - Rejected

21. Transaction Type must be Electronic, Voucher or Manual Backup to ensure consistency in use across Ridewise - Rejected

22. Expensive round trip – Same Pickup and Dropoff Location fare greater than \$30

23. Fare is greater than 3x minutes spent in Cab

24. Clients 5th or more trip in same day

25. Manual Transaction greater than \$60

26. Duplicate Transaction

- a. Same driver name, vehicle number, trip date, trip start time, trip end time
- b. Same Voucher Number and region

27. Overlapping Transaction

- a. Same driver name, vehicle number, trip date, trip start time within 2 minutes of end time of previous trip
- b. Same Client number, trip date, trip start time within 2 minutes of end time of previous trip