



NZ TRANSPORT AGENCY
WAKA KOTAHI

Planning & Investment Knowledge Base

User Guide

Table of Contents

NZTA Planning and Investment Knowledge Base User Guide	3
Registering and Logging in to the Knowledge Base	4
Key Features of the Planning and Investment Knowledge Base	6
Navigating the Planning and Investment Knowledge Base	10

NZTA Planning and Investment Knowledge Base User Guide

Introduction

This user guide provides:

- instructions for using the Planning and Investment Knowledge Base (PIKB), and
- background information about the purpose and structure of the knowledge base.

It provides instructions about how to login, navigate and use the available search functions, as well as the key features of the knowledge base and how it works.

Contents

The topics in this user guide include:

- Key Features of the Knowledge Base (What's in it what's not)
 - Registering and logging in to the knowledge base
 - Navigating the knowledge base
 - Search Options
 - Glossary
-

Registering and Logging in to the Knowledge Base

Introduction

The Planning and Investment Knowledge Base (PIKB) is available via a link on the Planning and Investment tab, on the NZTA website. The knowledge base may be accessed by both sector/staff users and the general public.

Register/login to the knowledge base

When users first access the knowledge base they can choose to either:

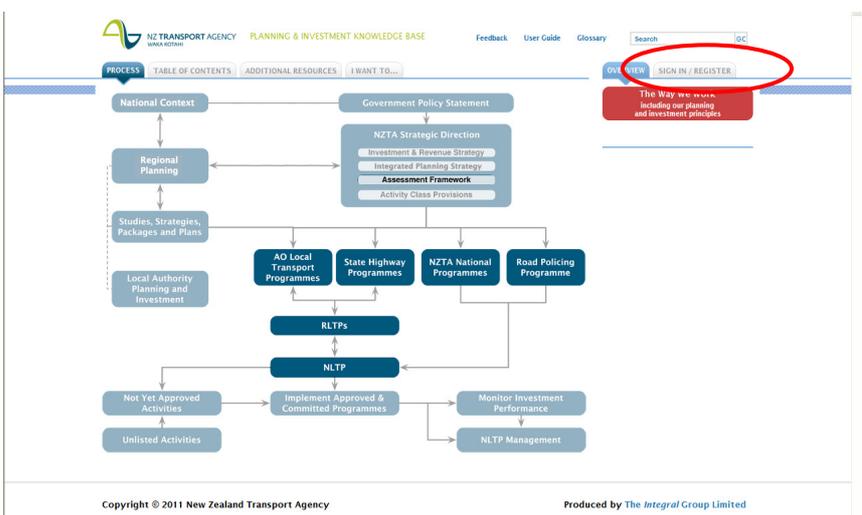
- not register and just access the information, or
- register and login.

Users must register and login to have the capability to:

- mark favourite pages, and
- submit feedback to NZTA about the knowledge base.

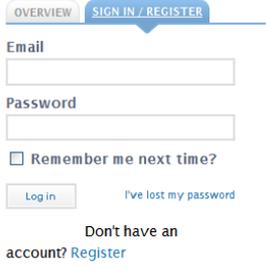
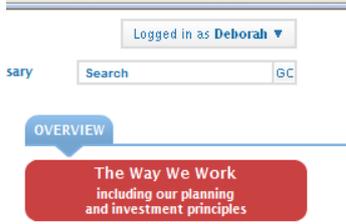
Note:

Users are encouraged to register and sign in each time they use the knowledge base, as logins provide increased functionality. Use the following instructions to register/login to the PIKB:

Stage	Description
1	<p>Once in the Planning, Management and Funding tab on the NZTA website, you can click on the link to open the Knowledgebase.</p> <p>Result: The PIKB homepage opens, with the 'Sign in/Register' tab displayed at the top right-hand corner of the screen, giving you the option to register and login into the knowledge base.</p>  <p>Note: You can view the knowledge base without logging in, but you will not be able to save favorite pages or provide feedback without first registering.</p>

Continued on next page

Registering and Logging in to the Knowledge Base, continued

2	<p>To register and login, click on the 'Sign In/Register' tab. Result: An email and password set of fields display.</p> 
3	<p>Place the cursor in the 'Email' field and type in your user name email. Tab to the 'Password' field and create a password. Click the 'Remember me next time' tick box and press 'Enter' Result: The 'Sign in/ Register' tab disappears and a 'Logged in as (Name)' field displays showing you as logged in.</p> 

Key Features of the Planning and Investment Knowledge Base

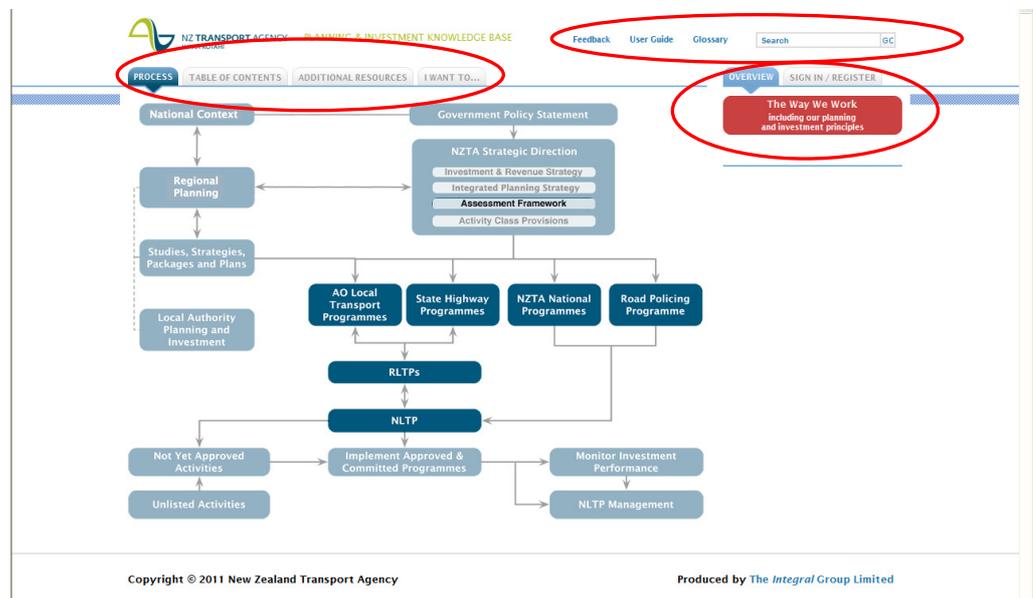
Introduction

This section covers some of the key features and functionality you will find in the Planning and Investment Knowledge Base (PIKB).

Navigating the home page

Some of the key functionality available as features of the knowledge base are:

- Tabs
- Feedback
- User Guide
- Glossary
- Search functionality
- Overview
- Sign In/Register, and
- The Way We Work
- Pop-up menus
- Breadcrumbs, and
- Links.



Continued on next page

Key Features of the Planning and Investment Knowledge Base, continued

Tabs

The home page includes a set of tabs. By clicking on different tabs you can access useful information about the PIKB.

Click on the **'Process'** tab to view the high level process and drill down to the detailed processes.

Click on the **'Table of Contents'** tab to view the contents in the knowledge base as a list of topics.

Click on the **'Additional Resources'** tab to view the links to manuals and templates already available through the intranet or internet, with links available for that information.

Click on the **'I Want To'** tab to gain direct access to information and templates that will assist you complete specific processes and procedures.

Click on the **'Overview'** tab to read through the principles and high level funding information for the Planning and Investment processes.

Click on the **'Sign In/Register'** tab to sign in or register your user identification on the knowledge base.

Click on the red **'The Way We Work'** tab to read important information about working with NZTA. This tab holds information about sources of funding assistance and an overview of NZTA's investment principles, which forms the basis and expectations that NZTA has of Approved Organisation, when applying for investment and funding assistance. When you click on the tab the following document links display:

The Way We Work

 Sources of funding assistance

 NZTA's investment principles - overview

Pop-up menus

On both the high level process map and the subsequent detailed process maps there are pop-up menus that display when process step boxes contain procedural documents.

Note:

Some areas in the high level map do not contain detail process maps, but instead are the repository for high level information that feeds directly into or supports some of the other detailed processes.

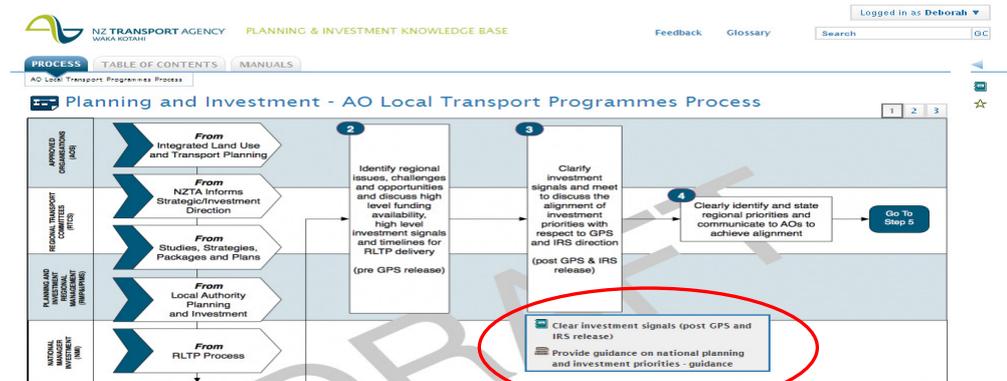
To activate the pop-up menus, click the mouse once in the process step box. These pop-up menus contain quick links to procedural guidance documents, checklists, templates and links to related manual information that you may require to complete a particular step in any given process. They may also provide links to other useful related information manuals

Continued on next page

Key Features of the Planning and Investment Knowledge Base, continued

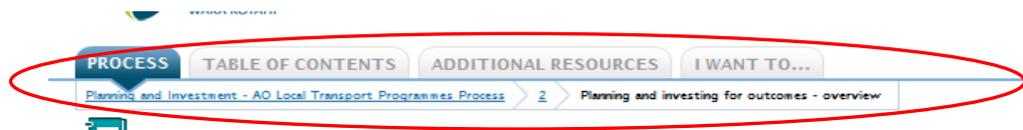
Pop-up menus, continued

An examples of the type of information you can expect to see on a typical pop-up menu is:



Breadcrumbs

Another feature of the PIKB is the breadcrumbs trail that appears on the top left hand side of the screen under the tabs.



Each time you drill down into a process or procedure a file path is created displaying where you have come from. This means that by clicking on any part of the file path you can return directly to that level of knowledge base.

Links

There are links to other documents and information placed at strategic points both in the process and procedural materials in the knowledge base.

These links will take you to specific sections either in the knowledge base itself or into other related manuals/information documents and give direct access to information you need to help you with the process step in which you are working on any given map. Links display as web link underlined text in the procedures documents as displayed below:

Exclusions

Studies that focus on:

- [regional public transport plan \(RPTP\)](#) and Regional land transport strategy (RLTS) preparation and management.
- [Tactical management plans.](#)
- detailed option selection of any component that is a part of an investigation phase for improvement activities, and
- single mode studies.

Continued on next page

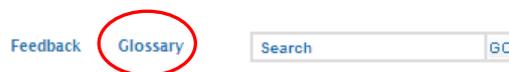
Key Features of the Planning and Investment Knowledge Base, continued

Glossary

Throughout the procedures, checklists and templates documentation you will notice some text/terms are underlined and bolded. If you hover the mouse over these terms a pop-up screen displays with an initial short definition for that specific text/term.

Clicking on the pop-up screen will open the glossary, at the specific term, displaying a full definition of the term. Click the 'X' box at the top right-hand corner of the pop-up screen to close the glossary and return to the original document.

You can also go directly to the glossary by way of the 'Glossary' tab situated at the top right of the screen next to the search field.



Supporting functionality

The PIKB is a dynamic support tool and will always hold the planning and investment current policy and procedures etc.

As part of its functionality the technology has the capability to ensure that users are kept abreast of changes on the system by:

- providing home page postings about new developments
- recording material print-outs and reminding users when that information is changed or updated.
- providing provision for users to feedback information about the system.

Home page postings

The home page of the system contains a posting area that may be used by national office to alert users to pending changes on the system, like changes in policy that are under development.

Material print outs

When you print out material from the knowledge base, the system records that a hard copy has been produced, when a change has been made to the content.

When you log back in, the system alerts you to the fact that a change has been made to the material you printed out and directs you to refer to the online information rather than the existing hardcopy.

Feed back provisions

The system has provision for you to email feedback and requests regarding technical content and system functionality to NZTA national and regional office planning and investment staff.

Once users are logged in their feedback is fed to both the Regional office and to a central National office co-coordinator

Navigating the Planning and Investment Knowledge Base

Introduction

The PIKB is based on a set of planning and investment processes. These begin with the high level process, which in turn connects to each of the detailed processes, process steps and procedures.

You can access the procedural information in the knowledge base via a number of options:

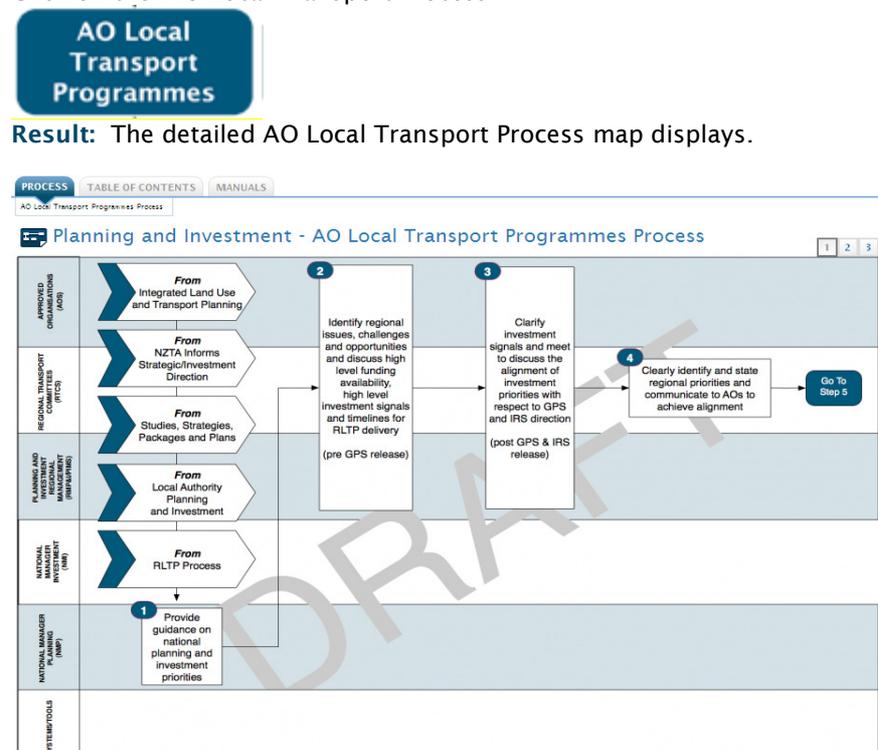
- drilling down through the process maps
- entering details in the search functionality, or
- accessing the table of contents.

Drilling down through the process maps

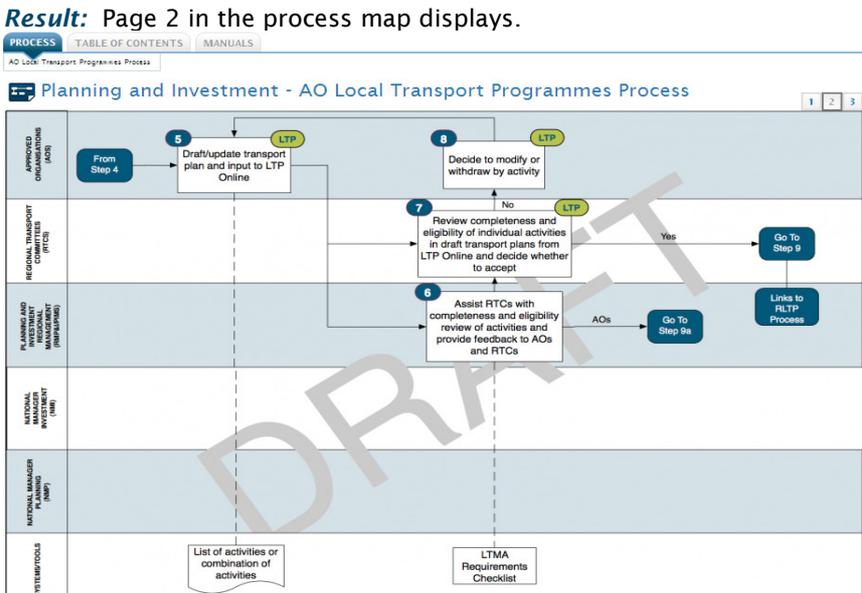
The knowledge base is built on a series of process maps that you can drill down through to access information, templates and tools, to assist you in completing specific steps or stages in any of the planning and investment processes.

Clicking on each process in the high level process map takes you to that detailed process. Once in the detailed process map you can hover over each stage in the process to reveal a pop-up menu of procedure documents, tools and templates available to assist you complete that particular step in the process.

Use the following instructions and screen shots in the following example to practise drilling down through the process maps:

Stage	Description
1	<p>Click on the 'AO Local Transport Process'.</p>  <p>Result: The detailed AO Local Transport Process map displays.</p>

Navigating the Planning and Investment Knowledge Base, continued

<p>2</p>	<p>Click on 'page tab 2' in the process map.</p>  <p>Result: Page 2 in the process map displays.</p> 
<p>3</p>	<p>Click inside the 'Process Step 5' box.</p> <p>Result: A pop-up menu of document options displays, showing each documents title and the document type i.e. overview/guidance/checklist/template etc.</p> 
<p>4</p>	<p>Hover the mouse over the document of your choice</p> <p>Result: The selected document is highlighted</p>
<p>5</p>	<p>Click on the highlighted document</p> <p>Result: The document opens ready for use</p> 

Continued on next page

Navigating the Planning and Investment Knowledge Base, continued

Using the search functionality

The PIKB also has a search functionality that allows you to search for items or information via a table of contents.

Use the following instructions to find something in the PIKB using the search functionality.

Stage	Description
1	<p>Click the cursor into the search field at the right-hand side of the screen.</p>  <p>Type in the word you want to search and click the 'Search Button'.</p> <p>Result: The entire table of contents for the word or selection of words that you type into the search field displays.</p> <p>Example</p> <p>Your search for "Overview" returned 22 results.</p> <ul style="list-style-type: none">  Overview  Clearly identify and state regional transport priorities and communicate to Approved Organisations to achieve alignment - overview  Review programme in response to RLTP consultation and NZTA negotiations - overview  Decide whether to modify or withdraw activity - overview
2	<p>Scroll through the list to find the information you are seeking or return to the 'Search' field to make a more detailed search if too many results are produced.</p>
3	<p>Note:</p> <p>The more specific the search words are that you type into the field, the narrower the search parameters.</p>