

User Guide for School Staff

Information and instructions on how to best use the TripComms application as a user with access to the staff portal.

Contents

Account Setup	2
Logging In	2
Forgotten your password?	2
User Roles	2
Managing Trips.....	3
Creating a Trip.....	3
Editing a Trip	3
Trip Approval.....	4
Requesting Approval.....	4
Responding to Approval Requests	4
Contacting Parents.....	4
Contacting Staff.....	4
Confirming Participation/Support	4
Cancelling a Trip.....	5
Document Management and Sharing.....	5
Adding a New Document	5
Deleting an Existing Document	5
Renaming an Existing Document	6
Sharing an Existing Document	6
Updating My Account	6
Admin Portal	6
System Overview	6
Managing System Settings.....	6
Managing TripComms Account Details.....	6
Creating New User Accounts	7
Updating Other User Accounts	7
Staff Accounts	7
Parent/Guardian Accounts	7

Account Setup

When an account is created for you, you will receive an email from TripComms containing a unique link.

Clicking the link will take you to the account verification page where you will be asked to set your password and security answers which will be used to recover your account if you ever forget your password.

Warning: The link you receive will expire after 72 hours, if you do not verify your account before this time one of your schools TripComms admins will need to login to their account and generate a new link for you to use.

Logging In

Go to <https://fyp.daniel-ellis.co.uk/login> and enter your email address and password.

Warning: If you incorrectly enter your details 3 times within 24 hours your account will be automatically disabled for 24 hours as a security precaution.

Forgotten your password?

Click the 'Forgotten username or password?' link displayed on the login page or follow this link <https://fyp.daniel-ellis.co.uk/recover-account>.

1. You will need to enter the email address associated with your TripComms account.
2. An email containing a unique link will be emailed to you, when you receive this email please read any instructions in the email and click the link.
3. This link will load the TripComms account reset page where you will be asked to answer one or more of your security questions.
4. If successful you will then be allowed to enter a new password, once you confirm this change your account will automatically be updated allowing you to login.

Warning: The password reset link you receive will expire after 24 hours. If you do not reset your password within this time the link will expire and you will need to start the account recovery process again.

User Roles

The TripComms system has 3 roles for school staff each one with a different level of permissions and privileges.

General: This is the standard role and provides users with the ability to create and edit trips and manage documents.

Approver: This role has the same permissions as a general user but they can also approve trips.
(Note: see school preference configuration section)

Admin: This is the highest role and should only be assigned to a limited number of staff, these users will have full control over your schools TripComms system and preferences. They can approve any trip on behalf of other users, and update your school's preferences and contact details. Additionally, admins can create and update all staff and parent accounts.

Managing Trips

From the TripComms portal homepage you will have access to several tables. You will always have access to the 'All Trips' table but all other tables are only displayed when they contain information. We implemented this functionality to provide you with a clean dashboard view of trips that are of importance to you.

These tables provide column ordering and global search functionality making it easy for you to find groups of trips or even individual trips. Once you have found the trip you are after simply click the table row to be taken to the trips details page.

Creating a Trip

On the trips homepage you will find a link at the top of the page or you can follow this link which will take you to the trip creation screen: <https://fyp.daniel-ellis.co.uk/portal/create-trip>.

The trip creation screen will present you with an intuitive form allowing you to populate it with details of your trip. As you enter more information the form will automatically validate the information you entered and inform you if anything is not right.

When initially creating the trip, we do not need all the information but we do require the following but it can all be updated in the future:

- Trip name
- Trip location
- Start date and time
- End date and time
- Parental response deadline
- Key stage group of students participating (if your trip spans multiple key stages please choose the highest)
- Number of staff provisionally required

Once you submit the trip for creation you will be taken to the details page which relates to this trip.

Editing a Trip

Trip leaders and admins can edit trips by initially viewing the trips details page and clicking the 'Edit' button found in the actions panel. This feature is only accessible to the trip leader and admins whilst the trip is in draft state.

The editing screen is identical to the trip creation interface but allows you to add or remove staff and students from the trip.

Note: Staff and students are not notified when added to or removed from the trip.

Trip Approval

Requesting Approval

Once you are happy that you have all of the information needed to fulfil your school's requirements you can click the 'Request Approval' button found in the actions panel.

You will be asked to enter a comment or message before confirming the request, this message will be added to the trips details and emailed along with a summary of the trip to your schools designated approvers.

Note: At this point you are not required to have added staff or students to the trip.

Responding to Approval Requests

Your schools designated approvers will be presented with 3 buttons when viewing the trips details page. When clicking any of the options the approver will be prompted to add a comment before confirming their response. Comments are optional when approving but all other responses require the approver to add a comment.

Approve: Will approve the trip. The trips status will only change once there are no outstanding approvals waiting for the trip, at this point an email will be sent to the trip leader.

Reject: Will reject the trip. If there are outstanding approvals waiting they will be cancelled and the trips status updated, the trip leader will also be informed via email. A trips rejection only requires 1 approver to reject it, if you are unsure about a trip it is recommended that you request more information first.

Request More Info: Will update the trips status and all outstanding approvals for this trip. You should use this option when you believe there is information missing from the trip or require clarification from the trip leader about something. The trip leader will be informed by email and can resubmit the trip for approval with the information you requested.

Contacting Parents

Once a trip is approved the trip leader and admins will have access to the 'Inform Parents' action on the trip details page. Clicking this button will automatically generate emails which are sent to the email address of parent/guardian associated with each invited student.

Contacting Staff

Whenever you add a new member of staff to the trip you will have the option of informing them, doing so will notify them via email with a summary of the trip and a request to confirm their involvement with your trip.

Confirming Participation/Support

If you have been invited to a trip this is because the trip leader would like you to be involved with the trip.

You should go to the trips details page and confirm or decline your involvement. If you confirm your involvement you will automatically be granted access to any secure documents related to that trip.

Cancelling a Trip

If for whatever reason you need to cancel your trip it could not be easier to do so, simply click the 'Cancel Trip' button in the actions panel and add a message explaining why you are cancelling the trip.

- If there are any outstanding approvals waiting they will be cancelled.
- If you have already informed parents about the trip they will be notified via email; your cancellation message will be visible to parents/guardians.

Document Management and Sharing

All document management is conducted from the documents page which all staff members have access to from the portal menu.

Here you will find a searchable table of all documents which you have access to. If a document is added to the schools general document library then all staff have access to the document. Secure documents are associated with individual trips and are only accessible by the trip leader and staff who have confirmed their involvement.

On each documents detail page, information about who has access to the document and a record of changes will be displayed as well as the actions panel.

Adding a New Document

From the documents page clicking the large upload link will display a popup window.

Location: You will need to choose where to store the document

Trip: If wishing to share with an individual trip, you must select the trip from the list.

Filename: This is the name given to the document and displayed in TripComms, it does not need to be the same name as the documents actual name.

File: Click the choose file button to select your document. Currently we allow the following document types to be uploaded: .csv, .pdf, .docx, .doc, .xlsx, .xls, .pptx, .ppt

Deleting an Existing Document

From the document details page, you have access to the 'Delete' button which when clicked will ask you to confirm the documents deletion.

Warning: Deleting a document cannot be undone, and any user who had access to the document no longer will. Always check the details page for which users and trips currently have access before deleting.

Renaming an Existing Document

From the document details page, you have access to the 'Rename' button which when clicked will ask you to enter the file's new name before confirming. This action will take effect immediately.

Sharing an Existing Document

From the document details page, you have access to the 'Sharing' button which when clicked will display a popup.

The popup will display two tables of trips, filtered based on whether the trip has access already or not. To share/un-share a document with a trip simply click the table row or select multiple rows and once happy with your changes you can confirm the changes.

Updating My Account

All users can update their own account details as below:

- **Name**
- **Email address:** Used for logging into your TripComms account and receiving notifications
- **Phone number:** TripComms will never contact you using this information. This number can be accessed by other members of staff at your school in the event of an emergency.
- **Password:** Change the password you use for logging into your TripComms account.

Admin Portal

System Overview

Admins will have access to the administration dashboard where they can monitor both account and trip numbers as well view a list of all trips taking place within the next 30 days.

Managing System Settings

On the school settings page admins can configure a number of preferences which TripComms uses to customise your school's processes and user experience.

Configure:

- Primary and secondary approvers.
- Ability for trip leaders to reuse risk assessments if suitable instead of creating a new one.
- Staffing ratios for each key stage group – used to prompt trip leaders when creating a trip and ensuring safeguarding guidelines are adhered to.
- School logo – used in documents and email.

Managing TripComms Account Details

The information displayed here is the contact information we hold about your school in case we need to contact you.

Admins can update the follows:

- School name
- School address
- School email
- School phone number

Creating New User Accounts

The account creation page is accessible from accounts page found under the admin menu.

You will have 4 options:

- Create single staff account
- Create single student accounts
- Create staff accounts via import
- Create student accounts via import

Once you have selected an option, the relevant form will be displayed allowing you to create an account(s).

Once you provide confirmation the account(s) will be automatically created and an email sent to the email address provided on the account informing them that an account has been created.

Updating Other User Accounts

From the accounts page, clicking any table row will display a popup of the selected users account details with the ability for you to update them. Once you have confirmed the changes their account will be updated immediately.

Staff Accounts

Change personal and contact information or the users TripComms role.

If changing the users role, they will be required to logout before the permissions are applied to their account.

Parent/Guardian Accounts

Change information relating to the parent/guardian or the student.