

Carpool Request Service Training & Support

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September 8, 2023

This document contains some helpful information for users and members using the Carpool Request Service. It should be mostly up-to-date, but there is a chance I've misused a workflow or some helpful instructions. If you need anymore assistance, please reach out using the following:

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+1-512-299-8961 (If you need to use my number, please text me)

Availability: After 3pm Monday through Friday, all-day on weekends

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1 Training

This section will briefly go over the steps needed to accomplish the major tasks of the website:

1.1 Signing Up

Before you can make an account on the website, please let your system administrator know so they may whitelist your email. Once you're whitelisted, go to the home screen by clicking the logo at the top of the page. From there, click the "Sign Up" button close to the bottom of the screen. From there, fill in your information and click "Sign Up." If this worked, you should be automatically signed into your account.

1.2 Signing In

Signing in works similarly to signing up. From the home screen, click the gray "LOGIN" button to be brought to the log-in page. Fill in your email and password to enter the site.

1.3 Editing Account Information

After logging into your account, you should see a button in the top right titled "Edit Account." You can change your information here. This includes:

- Name
- Contact
- Address
- Emergency Contact
- Parent Information
- Driver's License Information
- Password
- Miscellaneous Data

1.4 Member Points

Member Points track how many rides you've given. At the moment, it's just a statistic and doesn't do anything. You can find this number on the top right of the screen, titled "Your Points." You must be logged in to see it.

1.5 Whitelisting Members

To protect the system against people flooding it with requests and fake emails, we have a whitelisting system in place. Before anyone can create an account, their email must first be whitelisted. To become part of the whitelist, contact a system administrator.

If you *are* a system administrator, log into your account and click the "Admin" button at the top-left of your screen. Here, you should see two options: "Button Control" and "Whitelisting." By default, you'll be on the Whitelisting page. Simply click "Add Email," type in the email you want to add, then click "Create Whitelist."

1.6 Supervisor Role

The Supervisor can be set up through the "Member Overview" page by a System Admin. Supervisors can:

- Assign drivers to cars during an NDR
- Pause an NDR through the "Button Control" tab (under the "Admin" page)
- Start, Stop, Edit, or View an NDR

1.7 Admin Role

The System Admin role can be set up through the "Members Overview" page by a System Admin. System Admins can:

- Add people to the whitelist
- Promote other users to Supervisor or Admin roles.

1.8 The Phone Room

The Phone Room is where you'll see all the available requests for the night in an organized fashion. The "Incoming" page is where people can request rides. The "Waiting" page is where you can see the users who have request rides but have not been picked up. On this page, supervisors can assign, edit, or cancel rides.

The "Riding" page shows everyone who's currently in a car. Here, you can either finish the ride, cancel it, edit the request, or edit the car as needed.

Finally is the "Done" page, where you can see statistics on each ride for the night (including who it was assigned by, what car took them, and when they arrived home). Several actions can be performed here, including: edit the request, edit the car, or undo the ride's current status.

1.9 Driver Check In

The driver check-in button is on the top right of the screen and leads you to the same place as the "NDR" button on the top left. If an NDR is active, any member can sign up to be a driver for the night by clicking the "Join" button in the appropriate row. Alternatively, if they need to stop for any reason, a user may click the "Leave" button to stop being a driver for the night.

1.10 Nightly Director Report (NDR)

A Nightly Director Report, or NDR for short, is the period of time in which drivers are accepting and delivering rides.

1.10.1 Scheduling

NDRs can be created and scheduled ahead of time so members may have ample time to coordinate and join as needed. The NDRs have three functions meant for supervisors:

- Start/Stop – Start/End and NDR early or later than scheduled. An NDR can be closed and reopened.
- Edit – You can change the start/end times, how many members are needed, who can join, and whether or not the NG Station is an option for the night.
- Delete – Removes the NDR. If you delete the NDR, all information associated to it will be deleted. Only do this if the NDR data is recorded elsewhere or is not needed anymore.

1.10.2 Drivers

You can add drivers to an NDR by viewing the NDR and clicking the "Driver" button. You can also see the information associated with them, like their phone numbers, which car they're in, or their check-in status.

1.10.3 Cars

You can view and create cars for an NDR by viewing the NDR. By default, the "Cars" page will be open. You can also see who is associated with a given car.

2 Support

2.1 Account Deletion

When deleting or canceling your account, all your information will be deleted. Carpool will not be able to recover any account information. Only delete your account when you have left the organization entirely.

2.2 Driver Deletion/Removal

Drivers are created in association with an NDR. When a driver is deleted through the NDR page, all that user's driver information will be dropped. The completed requests will remain, but the driver associated with them will be eliminated. Only delete a driver when they weren't meant to be on the NDR in the first place.

2.3 Requester Phone Numbers

To maintain high security standards, end users' phone numbers will be wiped out when an NDR closes and cannot be recovered. In case of emergency, use the Howdy Portal to search the university directory for their contact information.