StarPort User Manual

Getting Started

a. Signup

Navigate to the homepage and click the “Sign Up Here!” link at the bottom of the grey box. Complete the first question - if you have ridden with JAUNT before, you will be able to use StarPort immediately and continue to the next paragraph. If you are a new rider, you will first have to call JAUNT at (434)296-3184 to set up a client profile before you are able to sign up on StarPort.

Assuming you have already created a client profile or ridden with JAUNT before, you will be able to complete the rest of the sign-up form: enter your first name, last name, an email address that you check regularly, and a secure password. Confirm your password by retyping it in the 5th box from the top. Next, select the language you prefer to use the system in (this can be changed again later once you’ve made an account). Finally, let us know that you’re a real human by clicking the checkbox next to “I am not a robot” and submit your application by clicking the “Create Account” button.

Once your application has been submitted, you will be taken to a confirm screen to show the signup process is complete. You will also receive an email to the address you specified in the signup form asking you to confirm your email address - simply click the link in the email to confirm your address.

As soon as your application has been submitted, a JAUNT employee will be able to activate your account (see Administrators). Once you have confirmed your password by clicking the link in the email mentioned above and your account has been activated, you will be able to login and begin using the system. All accounts created via this sign up page will be **Client** accounts (see User Types).

b. Login

Once a JAUNT employee has activated your account and you have confirmed your password, you will be able to login to the system. These steps only need to be taken on the initial sign up - after that, you will be able to login to the system with no problems.

To login, simply navigate to the homepage of the system and type in your username and password. If you have not confirmed your email address, the system will not let you login and will display an error message along the lines of: “Your account is being processed. In the meantime, please confirm your email.” If you have confirmed your email address but a JAUNT employee has not activated your account, you will see an error message along the lines of: “Your account is still being processed.” Once an employee has activated your account **and** you have confirmed your email address, you will be able to login to the system and will be taken to your user profile.

User Types

There are five user types within the StarPort system: Administrators, Clients, Schedulers, Hourly employees, and Drivers. All user accounts made via the sign up page described above are Client accounts. All user types are able to view their user profile and edit some preferences for their account. However, administrators are able to add new users of any user type. The capabilities of each user type are described below.

Clients

Clients have very limited capabilities - there are three tabs on the sidebar that allow them to submit reservations for themselves, a process described in further detail in Submitting a Reservation for Yourself, and view past or upcoming reservations. Pending reservations will displayed on their user profile. Clients also have access to links to external pages detailing how to ride with JAUNT and JAUNT's FAQ.

Employees

Drivers

Drivers have very limited permissions, and are able to only submit time-off requests, described in further detail in Submitting a Time Off Request. Drivers are also able to see their own pending and approved time-off requests.

Hourly Employees

Hourly employees are also able to submit time-off requests (see Submitting a Time Off Request
for more details), and view their own pending and approved time-off requests on their user profile. Hourly employees are also able to view pending, approved, and denied reservations and change the status of any reservation. See Reservations for more details on how to manipulate the status of any reservations within the system.

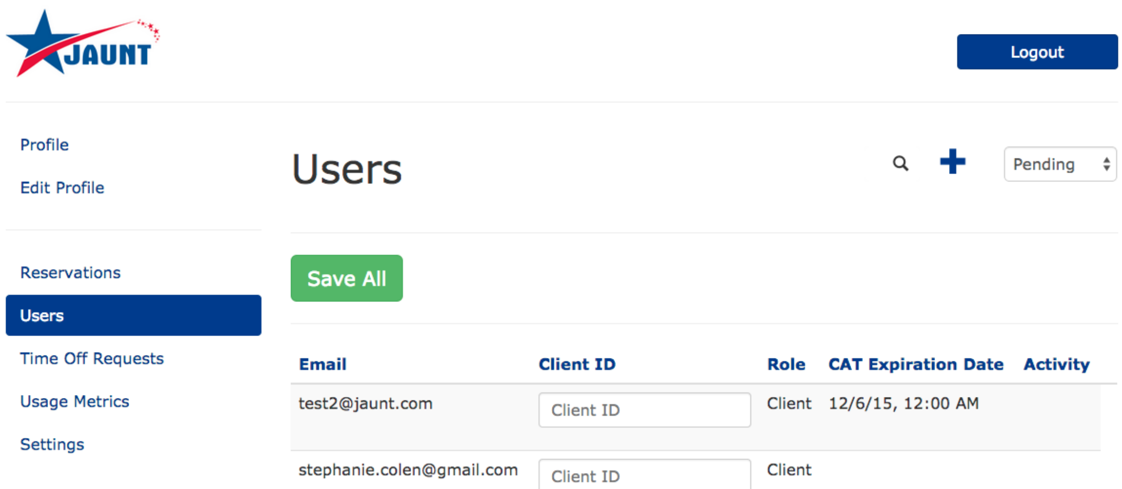
Scheduler

Schedulers are able to submit time-off requests and view their own pending and approved time-off requests via their user profile. As with hourly employees, schedulers are also able to view pending, approved, and denied reservations and change the status of these reservations - a process described in Reservations. In addition, schedulers are able to view all time-off requests for any user and approve or deny them and generate PDF reports, all of which capabilities are described in Time Off.

Administrators

Administrator accounts are used primarily for managing users, rather than submitting time-off or reservation requests for themselves. However, administrators are still able to submit reservation requests for other client users, as described in [Submitting a Reservation for Someone Else](#). Administrators are also able to edit users - they can change a user's name, role, and language. If a user has a client account, the administrator is also able to change the user's client ID (approving the account if this is the first time the client id has been added) and their CAT disability information.

Administrators can also batch approve user accounts via the pending filter in the dropdown in the top left corner of the screen, as shown below.



When this filter is selected, by simply changing the value shown in the dropdown, the results will be filtered to show only any unapproved client accounts. Administrators can add any or all Client IDs and click the save all button, returning to the full users results. Any accounts that are not approved by entering a Client ID on this page will remain unapproved.

Administrators can also filter user accounts by the type of user using that same drop down menu - Admin, Client, Hourly, Scheduler, and Driver. To return to the full users result set, select the "No Filter" option on the drop down.

Administrators can choose to add a user as well, by simply clicking the large "plus" button to the left of the dropdown filter. This form enables an administrator to add user accounts for staff, as the signup form described above only creates client accounts. An administrator will need the user's name, email, and preferred language at a minimum to create a new account. If an administrator wishes to add a new client account, they must also have a client ID and any CAT disability information. The system will still require the client to verify their email address, as described above, before the account is considered active.

When viewing the full users set, administrators can also sort the accounts by various criteria, simply by clicking on the column headers. The criteria include email, client ID, role, CAT expiration date, and activity status, all in ascending *or* descending order.

Finally, administrators are able to search the result set. Simply hover over the magnifying glass next to the large plus sign and the search box will expand. Click to type in the box and search the name and email of any user - the search will match all or part of any string a user types in. Press the enter button on your keyboard to submit a search, and the page will refresh with your results.

User Actions

Reservations

Submitting a Reservation for Yourself

While logged in as a client, select the “Make a Reservation” tab in the sidebar. The Reservation form will open with several fields pre-populated (name, trip day, trip time). After verifying that the name is accurate, fill out the rest of the form, adjusting the trip day and time as necessary for the trip. Note that when selecting the trip day field a small window will open that will allow you to select a specific day from a calendar view. If you have previously filled in Reservations, you may select previous addresses to quickly input the desired address. If there is no appropriate previous address, you may fill it out as normal. Once the form is finished (the check boxes and comments field are optional, and exist for special cases), just click the submit button to enter the reservation. In the event of an issue with the entered data, a warning will appear and the form will remain open with the data entered present.

Submitting a Reservation for Someone Else

While logged in as an admin, select the “Reservations” tab in the sidebar. Next, press the “Add Reservation” button in the upper right hand corner. Fill in the name and client ID of the client that you are filling the form out for. Once this is done, the form is same as it appears for the client. Refer to *Submitting a Reservation for yourself* for more specific details.

Will Call

While submitting a reservation, first select that the trip has a medical destination, then select the “Will Call” checkbox. The “Will Call” option is not available if the trip is marked as “One Way”.

Previous Addresses

When filling out a reservation, you may select a previous address for the pick up location or the destination. The list of previous addresses is based on the previous reservations made by the account. Selecting a previous address will fill in the relevant fields for you, though you can change these fields as desired.

One Way

When filling out a reservation, there is an option to select that the trip is “One Way”. When selected, the reservation will not include a return trip. It is possible to make a trip with multiple legs by filling out several “One Way” trips for each leg.

Approving a Reservation

While logged in as a scheduler, hourly employee, or admin, select the “Reservations” tab in the sidebar. Next, select the “Pending” or “Denied” tab near the top of the page (pending is selected by default) to view the correct category for the desired reservation. The reservations are presented in “wells”, with the options to edit each one available on the upper left corner of each well. Selecting the check mark will approve the reservation. If the reservation is pending, you may also select the pencil to edit the reservation. In this case, a new page is opened up that allows you to adjust the trip times of the reservation. Note that the save button also approves the reservation. To leave this edit view, simply click the “Reservations” tab on the sidebar again or use your browser to go back a page.

Denying a Reservation

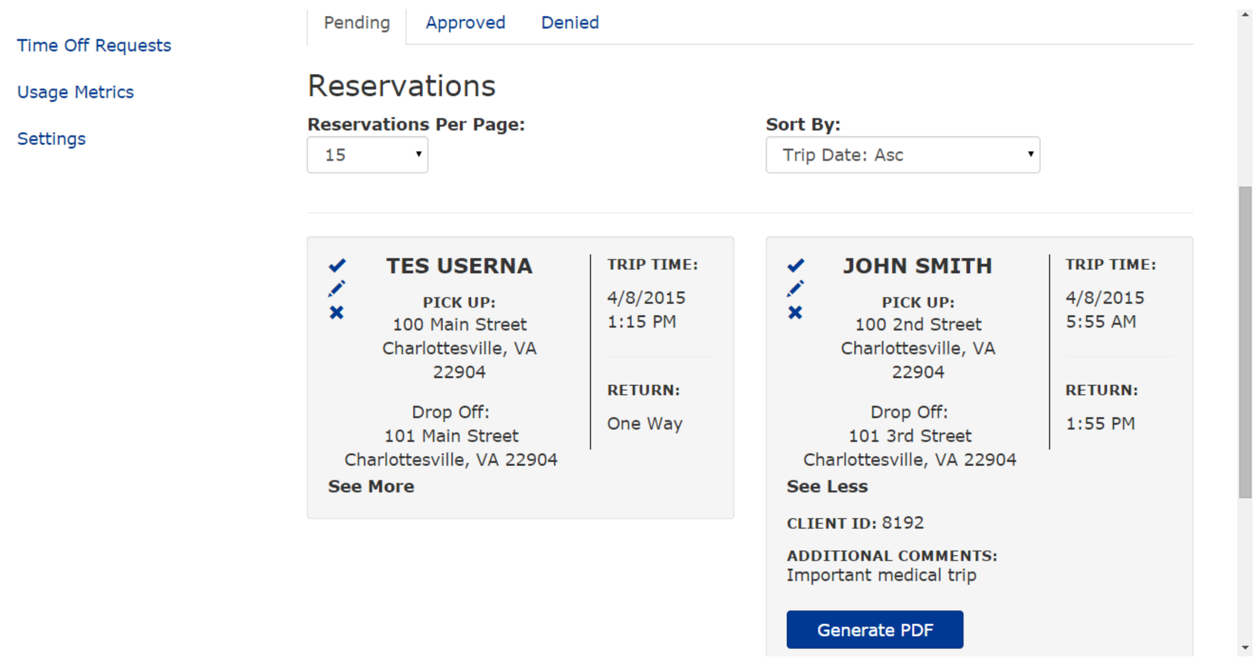
While logged in as a scheduler, hourly employee, or admin, select the “Reservations” tab in the sidebar. Next, select the “Pending” or “Approved” tab near the top of the page (pending is selected by default) to view the correct category for the desired reservation. The reservations are presented in “wells”, with the options to edit each one available on the upper left corner of each well. Selecting the X will deny the reservation.

Viewing Reservations

To view reservations as a client, login then select either “Upcoming Reservations” or “Past Reservations” in the sidebar to view the relevant information regarding your reservations.

To view all reservations made, login as a scheduler, hourly employee, or admin and select the “Reservations” tab in the sidebar. There are three tabs at the top of the screen, Pending, Approved, and Denied that will filter the reservations based on their current status. You can also change the sorting within each tab while viewing the reservations.

To view more information than is normally visible in a given reservation “well” (pictured below), press “see more” at the bottom of the “well”. This will expand the information displayed, as well as give an option to generate a PDF of the relevant information.



Time Off

Submitting a Time Off Request

Click “Make a Time Off Request” in the sidebar. You must specify the type of time off request you are making, either sick, bonus, or annual. If you are only taking a single day off, simply click on the day within the calendar. If you are taking multiple days off, start by clicking on your desired start date and without releasing your mouse, drag across the calendar to your desired end date. This will create an option for the specified date range.

After selecting the date range for your Time Off request, a window will pop up. In the popup window you can specify whether or not you want to take the entire day off. If you only want to take off part of a day, uncheck the “All Day” checkbox and use the dropdowns to determine the appropriate time. When you are satisfied with your Time Off request option, click the “Save” button to close the popup.

To change the priority of the options you have created, click and drag the rows of the “Selected Options” table. The top row has the highest priority and the bottom row has the lowest.

To edit or delete an option, simply click the option in the calendar.

View your Time Off Requests

Click “Profile” in the sidebar. All of your pending Time Off requests can be found in the calendar at the bottom of the page. All pending requests are orange while approved requests are blue.

Viewing a Single Time Off Request

From the Time Off calendar, you can click on any of the Time Off requests in the calendar to view a summary of the request in a popup. To view more detailed information about the request, click on the “View” button at the bottom of the popup.

Generating a PDF of a Time Off Request

Follow the steps for Viewing a Time Off Request, then click the “Generate PDF” button at the top of the page.

Viewing All Pending Time Off Requests

Click the “Time Off Requests” link in the sidebar. A list of all pending requests in the system will be displayed at the top of the page.

Name	Date Submitted	Comments	Action
Stephen Boris	March 31, 2015	Testing am/pm	
Hourly Jefferson	March 22, 2015	None	
Thomas Jefferson	March 12, 2015	None	
Thomas Jefferson	March 12, 2015	None	

Responding to a Time Off Request

To approve or deny a Time Off request you must be viewing the detailed page for the request. You can get to this page by either clicking on the request from the calendar or by clicking the icon in the “Action” column of the pending request table.

The detailed page for the request has a table containing each of the options specified by the employee.

Employee
Thomas Jefferson

Request Type
Bonus

Status
Pending

Comments
Going on vacation

Preference	Start	End	Action
1	04/06/15 12:00 am	04/09/15 12:00 am	✔
2	04/14/15 12:00 am	04/17/15 12:00 am	✔
3	04/09/15 12:00 am	04/11/15 12:00 am	✔

Deny Request

To approve an option, click on the “check” icon in the action column corresponding to the option you wish to approve. After approving an option, the table row for the approved option will turn blue.

Employee
Thomas Jefferson

Request Type
Bonus

Status
Approved

Comments
Going on vacation

Preference	Start	End	Action
1	04/06/15 12:00 am	04/09/15 12:00 am	✖
2	04/14/15 12:00 am	04/17/15 12:00 am	✔
3	04/09/15 12:00 am	04/11/15 12:00 am	✔

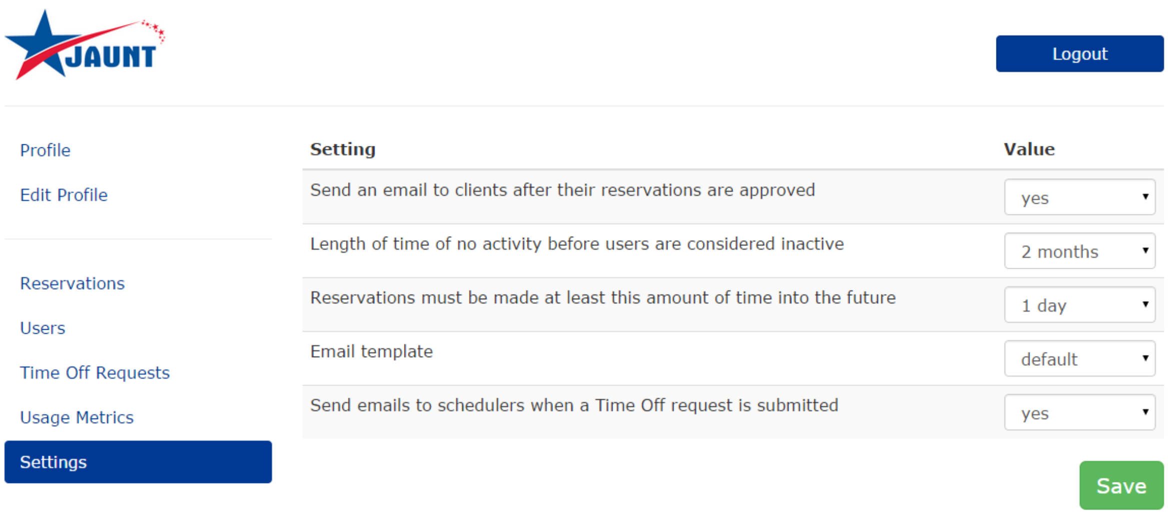
Deny Request

If none of the options are suitable, you can click “Deny Request” to deny the request entirely.

Administrator Views

Settings

The settings page can only be accessed by “admin” users. After logging in, the settings panel can be viewed after clicking the “settings tab” in the bottom left hand corner of the navigation panel.



There are five possible settings that can be changed by the admin:

Confirmation E-mails

First option is whether or not to e-mail a client when a reservation is made. There are only two options that can be selected, “yes” and “no.” The default option is set to “yes” which means that after a client makes a trip reservation, it will be sent to a higher level user who can approve or deny this reservation and if it is approved, then they will be sent an email confirming the details of the trip.

Inactivity Notifications

The next option is to set notifications for inactivity. If users are “inactive” meaning they have not used their accounts such as made a reservation for a certain period of time. The default setting is two months so if they have not used their account in two months then they will receive a warning in their profile. The other possible settings are one month, three months, six months, and a year.

Reservation Setting
The third option is to set how far in advance a user must set their reservation in advance to the desired date they want to travel. Default setting is one day so if the user wishes to make a trip, they must make the reservation one day in advance to the time and date they want to travel. This setting can be changed to two days as well as three days via the dropdown menu.

E-mail Template
Fourth option on settings is to choose which email template that is used when sending emails to users. Currently there is only a default template being used that has been designed and approved by Jaunt but there are two more in the drop down menu, Format A and Format B which are test templates that can be edited for future use if the admins desire to use and create more e-mail templates.

Scheduler Emails
The final option on settings is similar to the first settings option and it is to send emails to schedulers every time someone sends a time-off request. The current default setting is set to “yes” so everytime an employee makes a time-off request, the details of this request will be sent to all the schedulers via an e-mail. The only other option is to turn this setting off if the schedulers feel that they are receiving too many e-mails.

Metrics

Viewing Lifetime Metrics

In order to view metrics of the systems whole lifetime, click “Lifetime Metrics”. This will display the information like total number of users, total number of reservations, average reservations per user, total pending reservations, total approved reservations, and total denied reservations.

Viewing Metrics of System for Desired Date Range

In order to view metrics of the systems for desired date range, select the desired date for start date and end date and then click on “Apply Filter”. This will display information mentioned in Viewing Lifetime Metrics for desired date range.

Generating a PDF of Lifetime Metrics

In order to get a pdf file of the Lifetime Metrics, click on “Generate Lifetime PDF”. This will generate a pdf with the lifetime metrics, which will be downloaded into your browser’s default download folder.

Viewing User Specific Lifetime Metrics

In order to view a user’s lifetime metrics, first select the user in from the options given on the right side of the title “User Specific Metrics” and then click on “Lifetime Metrics” below the title. This will display the last activity and total reservations for the chosen user for the whole time that user has used the system.

Viewing User Specific Metrics for Desired Date Range

In order to view a user’s lifetime metrics, first select the user in from the options given on the right side of the title “User Specific Metrics”. After choosing the desired user, select the desired date for start date and end date and then click on “Apply Filter”. This will display the last activity and total reservations for the chosen user for the desired date range that the user has used the system.

Generating a PDF of Trends for Reservations, Registrations and Time Off

In order to generate a pdf file of trends for reservations, registrations and time off, click on “Generate Trends PDF”. This will generate a pdf file with a table displaying number of reservations, registrations and time off made for each month of the whole systems lifetime, which will be downloaded into your browser’s default download folder

Generating a CSV of Trends for Reservations, Registrations and Time Off

In order to generate a csv file of trends for reservations, registrations and time off, click on “Generate Trends CSV”. This will generate a csv file with a table displaying number of reservations, registrations and time off made for each month of the whole systems lifetime, which will be downloaded into your browser’s default download folder

Viewing Graphs of Trends

Reservations, Registrations and Time off trends can be viewed as a graph. In order to view the graph of trends for Reservations, click on “Reservations” located below “Generate Trends PDF” and “Generate Trends CSV”. Similarly, to view the graph of trends for Registrations, click on “Registrations” located below “Generate Trends PDF” and “Generate Trends CSV”.

To view the graph of trends for Time Off, click on “Time Off” located below “Generate Trends PDF” and “Generate Trends CSV”