Denbigh Administration

Events Excursions Module (VTR)

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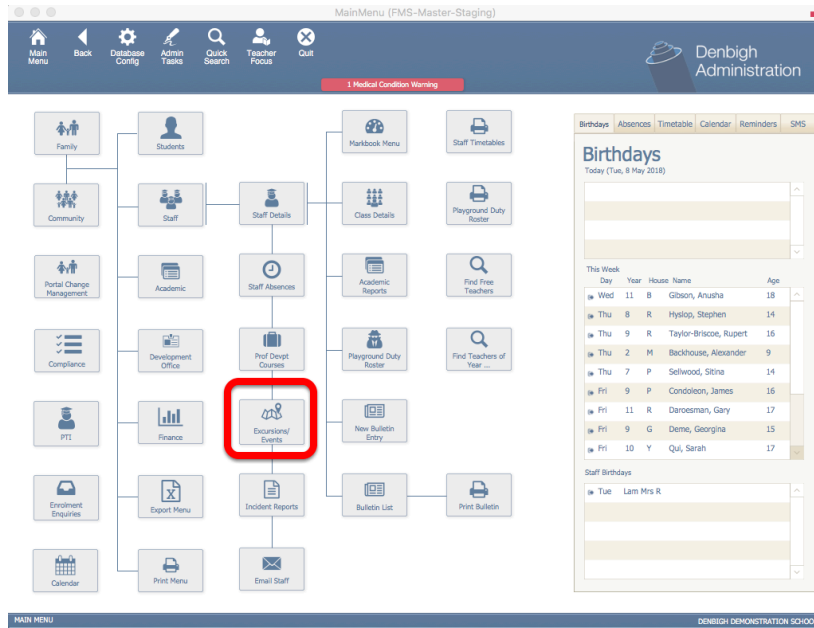# Excursion/Events Module

Allows staff to request a variation to their daily routine. For example excursion, incursions and any other out of school activities not part of their normal timetabled day.

Excursion/Events Module has been designed to allow staff members to request permission for an event by going through the appropriate stages. The Event Menu consists of 5 major stages, each stage consisting of multiple secondary stages. The following manual aims to explain how to correctly use the Event system. Each stage of the Event requires different access privileges, the higher the stage the more senior the position the staff member is. Please note that any reference to VTR stands for Variation to Routine the original name for this module.
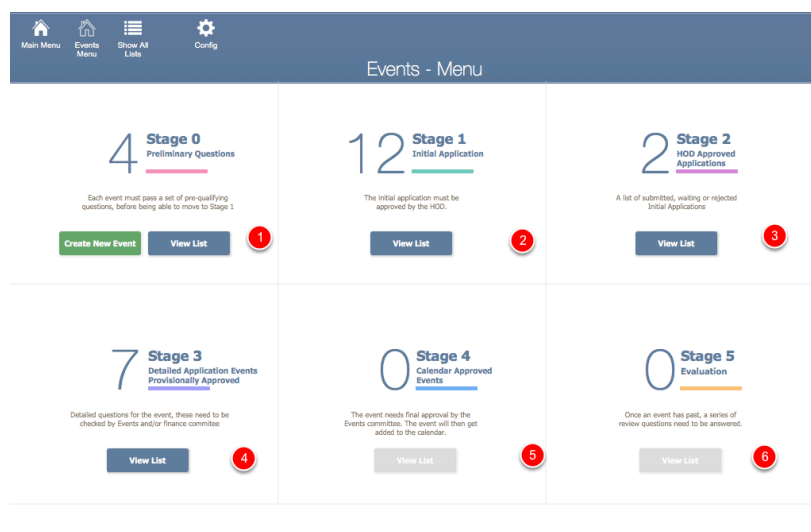

Denbigh Teacher Menu

Excursions/Events (VTR) can be accessed from the MainMenu on Denbigh Admin or Denbigh Teacher Focus. The Purpose of the Events Module is to allow Teachers to formally request permission for activities such as Excursions, Camps any activity outside of the normal teachers day.

Events Menu

Within the Events menu displays the different Stages that are required for creating, getting permissions and evaluating the Event.

1 - Preliminary Questions/Stage 0 is the initial questions to ensure that the Variation meets the appropriate criteria before requesting approval.

2 - Initial Application/Stage 1, once the initial questions have all been fulfilled then it can pass to the initial application. This will provide the user with basic details about the excursion and the relevant Head of Department (HOD) for the event.

3 - HOD Approval Stage/Stage 2. After the initial application has been processed the HOD is then required to provisionally approve or decline the Event.
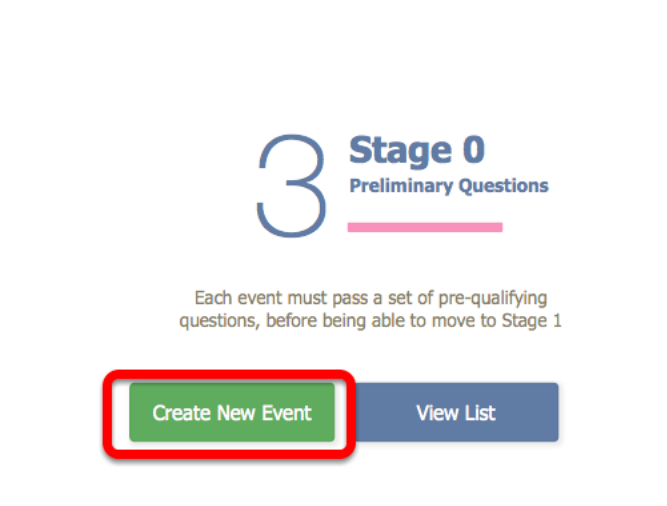4 - Detailed Application Provisionally Approved/Stage 3, This stage collects more detailed information and creates and stores any documents related to the provisionally approved event.
5 - Calendar Approved Events/Stage 4, lists the events that have been approved and creates a record of events for the year in the calendar module.
6 - Evaluation/Stage 5, Allows staff to go back into a final section of the event after it has occurred and comment on standard evaluation questions.

The Number on the Left of the Stage represents how many events are currently within that stage. For example in stage 3 there are 7 events that have been approved.

Creating a Event - Preliminary Questions (Stage 0)

To create a Event select "Create new Event"

Creating a Event record will allocate a unique ID number.   This list of questions must all be checked or have information entered before being allowed to go on to stage 1 and start entering more specific information. Below the menu bar the system will indicate which stage you are currently on, when users pass on to the next stage they are still able to go back to previous stages and edit information.

In order to proceed to Stage 1 all "*Required" fields need to be filled in.

Please note TPL -Teacher Professional Learning is another section of Event which allows teachers to request for permission to leave school for Professional Development courses. (Feature coming soon)

If questions 4 or 5 are marked as "Yes" the user will not be able to create this even. Question 7 refers to which timetable line on the Budget or financial statement the Event expense will appear on. For example Line 17 PDHPE, the finance department to either approve or decline the Event can use this.

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Activity Details

Once the initial question stage is completed, the user can then move on to the Initial Application (Stage 1). Should the user wish to edit the information in the Preliminary Questions, they can switch between completed stages. A pending Label will also appear identifying the status of the event and whether or not it has been approved yet.

1 - Activity Title, a specific format is required for the Activity Title. Eg. Year/ Subject Abbreviation/ Event Name. If the event is generic you may not need to use all 3 elements.

2 - Proposed Start Date, both start date and end date must be entered. If the event is for only one day start and end date will be the same.

3 - Proposed Time - either enter the Periods or Times. If entering a start time and an end time, ensure that both times are in the following format: HH:MM PM/AM. If the event is all day enter times for example 8:00AM to 5:00:PM.

4 - Check Calendar, This action will check the schools calendar to ensure that no clashes will occur if the Event is created. See below regarding Check Calendar function.

5 - Activity Area (Faculty) involved, Activity type (Calendar type), Activity Location (Calendar locations)

6 - Displays all the required items before moving onto the next stage. As each item is entered it will not display on this list.

7 - Click "Next" to go to the next required questions.
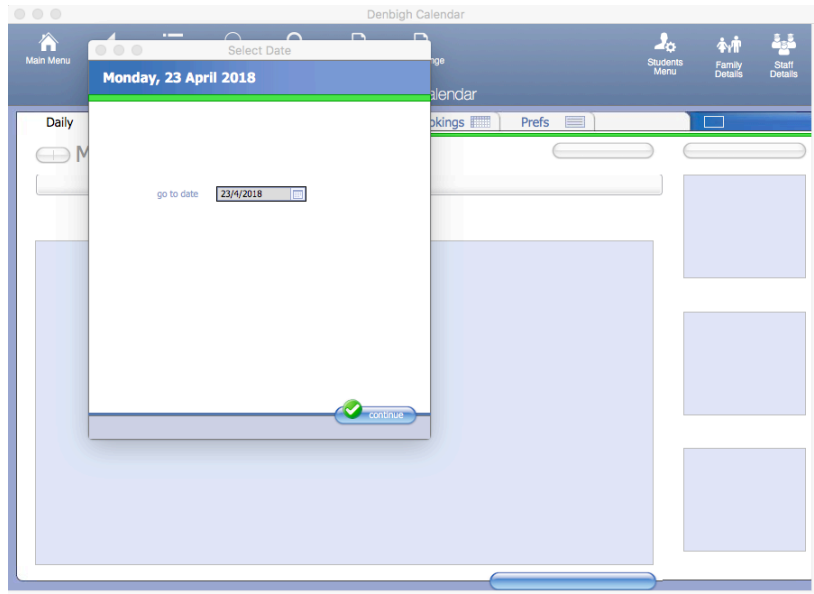
Enter the date of the proposed Activity, Click "Continue".

Calendar
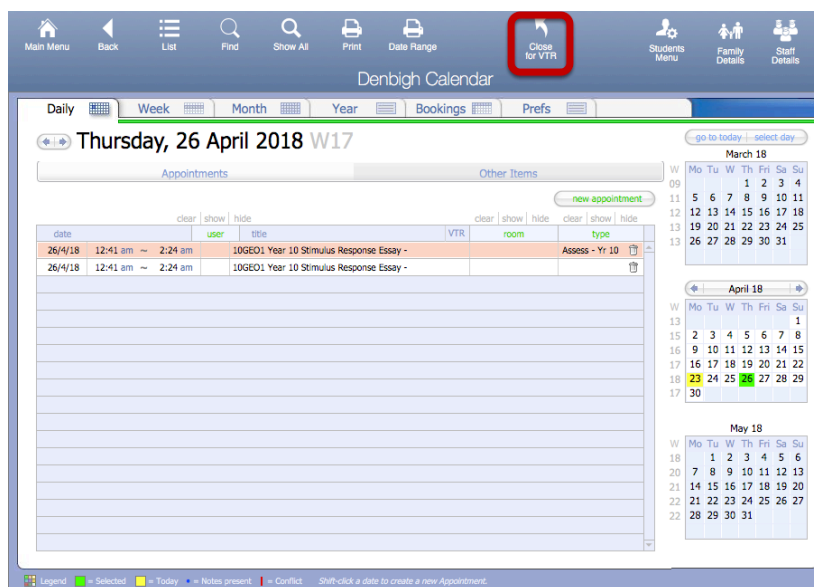
Once the Calendar has been checked the user can then click the "Close for Event" which will take you back to the Event page, and then the required tick box can be checked to indicate that the calendar has been checked.

Staff Involved

At any point during the Event process the user is able to go back to the Main Event menu, this will not delete the event being created instead it remains as a draft.

1 - Staff Involved, Enter the Faculty and Staff member/s required from the drop done list. Only staff in the faculty selected will display. Choose the roll for the selected staff member. If they are doing all roles, Click "Set All Roles" button.   Click "Add Staff" to ensure that the staff member is added to the portal below.

2 - Non-School Staff for any parent or casual staff member attending.

3 - Navigation back and forward between each section of the Initial Application.

Classes Involved

Enter the details regarding the classes that may be attending the Event. *The Year Group Involved is a required field.

Resources & Transport

1 - If Transport is required further information will be required.
2 - Costs can be set up in the Configuration Section. (See page 34)

Staff

Choose the faculty and name of the person approving the Event. The HOD can then send on the event for Approval.

Once the "Submit to HOD" has been clicked a pop-up box will appear warning you that you are about to submit the Event to the HOD and if any changes need to be made before this, it should be done before selecting "OK". An email will be sent based on the details in the Configuration section. (see page 34)

Event List

Once the request has been submitted to HOD, It will now appear on the Event List.

1 - Event ID
2 - Activity title
3 - HOD's Staff code
4 - Faculty
5 - Start Date
6   - Current Stage
7 - Approval Status (Pending, submitted, Declined, Tentative, professionally, Final Approved, Approved)
8 - Staff in Charge
9 - Created by
10 - Administrators tools to change or update stages
11 - Label information

12 - for information, displays the approval history.

Stages and Approval Status Colour Codes

Click the Labels to view the Stage and Approval Label explanation.

Event List Functions

1 - Enter Filter details and click Filter
2 - To show all after filtering
3 - To print the current list

HOD Tentative Approval

Once Stage 1 has been completed the HOD will now have to log into the Event file and go to the event requiring approval. HOD to enter details regarding the decision

HOD decision for Stage Approval

1 - Cancel will close this window and make a record for the Approval log
2 - Enter and reason and then the Approval log will be updated.
3 - Approval log
4 - Click Declined or HOD Approval
5 - For schools that have an online Calendar that may need to be updated.
Once the event is either declined or approved an email will be sent to the appropriate staff. Changes can then be made to the original event and then re submitted. When approved the event will be added to the calendar.

Stage 2

Event stage 2 list with approval status.

Stage 2 will then need to be approved by the Event committee.

Stage Approval

Event No. **000238**
Staff in Charge: **Michael Harvey**
Current Stage: **1**
Calendar Appointment ID: **144**

Event Title | **Year 7 Science Bathurst Zoo Excursion**

Staff | **DENB** | Jane Denbigh

Reason/ Comment | Depending on the risk assessment.

Approval Log

Approval Staff	Date	Stage	Status	Reason
➡ DENB	09/05/2018	Stage 1	Tentative	Depending on the

Declined   **Event Approved**

Which online Calendar

The Event Committee then enters their reason/s comments whether it is approved or declined. An email will then be sent to the appropriate staff. When approved the event will then move onto Stage 3.

Detailed Application Provisionally Approved (Stage 3)
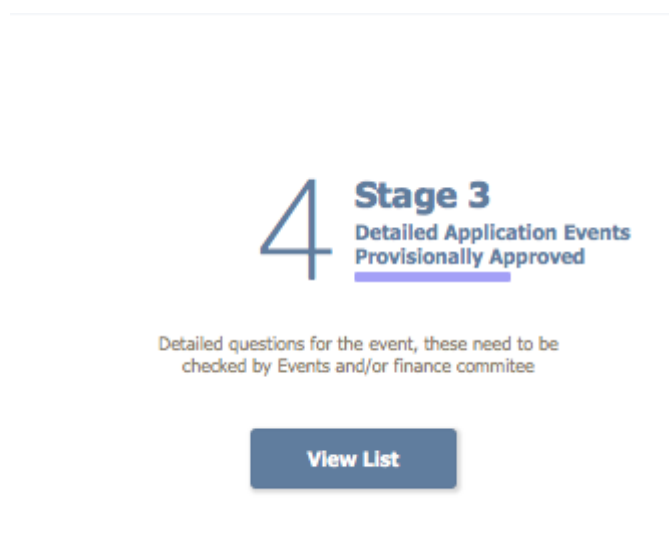
This stage requires the Event Assistant/ Finance Administrator to go through the application and provide a more detailed description of the event including the costs and risks involved. Clicking the "view List" will take you to the Event list view where the user can then select which event needs to be processed.

Special Expenses
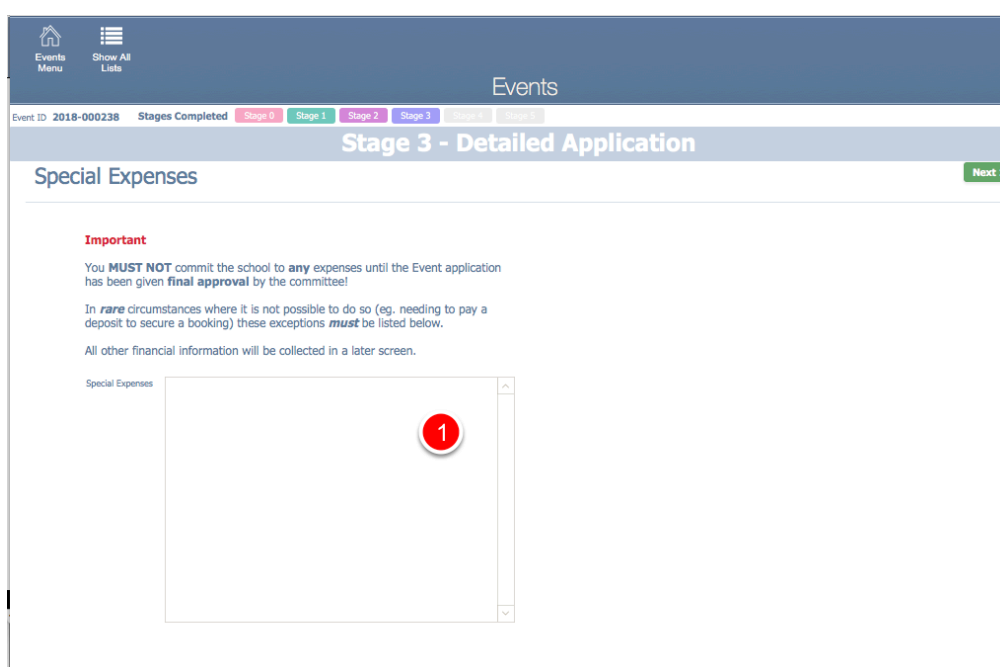
The first level of stage 3 requires the Event Assistant/ Financial Administrator to provide more detailed information about the event.
1 - Special Expenses to be entered. (please note the user should not commit the school to any expenses until the final Event application has been approved.)

Student Selection

Select the appropriate students that will be going on the Event. The user is given the choice of selecting a student from different categories that being Academic Year, Classes, Co-Curricular, Sport.   Once the Student selection is chosen all students will be displayed. A filter can be applied to filter according to the fields of (Student id, First Name, Last Name, Gender, Boarder).

Once the student's have been chosen the user can then move the students going to the event to the Attending Student List. Either moving all students across through the "Move All to Attending" button can do this.

1 - Move All (in order for the user to use this button a filter cannot be used)

2 - If a filter has been applied to the available student list. The push button per student should be used to transfer students from the available list to the attending list.

3 - Displays the number of Students

4 - To delete all from the list.

Once an attending student list has been created the user may then proceed to click the "next" button.

Staff Selection

Staff Selection of Stage 3 involves ensuring that all required staff and roles have been met.

1 - All of the following roles need to be created to ensure that the Event can be approved. If a staff member is responsible for multiple roles, enter their names multiple times.

2 - A non staff member can be added by simply entering their name and role and clicking the "Add Staff" button.

3 - An email can be sent to the staff members notifying them about the Event and the role the responsibility required.

Once all the staff members have been added and the roles match the recommended roles, proceed to the next layer by clicking "next".

Catering Numbers

The following should be filled in if required.

1 - Meals - The Event Assistant/ Finance Admin should indicate which meals the students on the Event will be eating and the costs associated with the meal. This provides a total cost which is added to the total Event expense.   If no meals required check no.

2 - Meals provided by the School kitchen

3 - If there are Boarder Meal, If Money is given to boarders to by meals with, then the amount of money given as well as an allocation to which meal it is for should be provided.

4 - Catering costs If the answer to the first question of whether the Event goes across any meal periods is "NO" then the staff member may proceed without filling out any catering information, if the answer is "yes" they must fill out all the catering fields in order to continue. (Configuration setup see page 34)

5 - External Catering required.

6 - Special Meals if they are required the "YES' box should be selected and the appropriate information should be entered, otherwise the user may proceed to the next step.

At any point during this process should the user wish to go back a step or proceed to the Event menu, they may do so and the work completed so far will be saved as a draft.

Logistics

1 - The following information is to be acquired and entered by a third party person but still needs to be completed before the teacher can submit for final approval. Each other sub sections should be completed by the Event assistant or the Finance Admin Staff.

2 - Transportation. If transport was requested in stage 1 the system will automatically tick the yes checkbox and the appropriate information as to where the transport is picking up and dropping the Event attendees. If no transport was required then the system will automatically tick "No" and the section does not need to be completed.

Once the information has been entered in correctly the user may proceed to the next step by clicking "Next".

Event Costs

Event costs should be filled in by a Event Assistant and/or Finance Admin.

1 - Cost to be recovered from the Students

2 - Estimate of Costs, All costs should be placed within this portal as it works in conjunction with step 3 to identify how much the school will charge each student to attend the Event. Even if the amount is $0 it should can still be added.

3 - Print Summary Report

4 - Cost checklist (configuration page 34)

4 - Summary of Costs, This table will use the estimated costs to calculate the "Costs Charged Per Student".

5 - Cost Reconciled, This button can only be completed by someone who is a member of db_VTR _Finance or higher. Until the authorized person has clicked this button it is not possible to click on the "Final Decision" Button

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Summary of Costs Report

Supporting Documentation

Event events should be accompanied with supporting documentation. Types of supporting documents include: SummaryEventDetails, StudentList, MedicalAlerts and StaffRoles.

1 - Generate Event Forms - this button should be clicked in order to automatically generate the event forms.

2 - Extra Documents, If extra documents exist they can be added by "Find File" which can add files on your desktop and then "Insert Doc" to add the document to the Event Documents.

3 - Risk Assessment, Risk Assessments are to be imported into a separate area of the documentation section.

4 - Approve Risk Assessment, in order for the Event to be approved the risk Assessment needs to be approved by the Event committee (db_vtr_commitee group)

5 - Cancel, if the Event Committee chooses to go back and start the approval process again he/she should press the "Cancel" button, this will delete the changes made and will take the user back to the Event list.

6 - Submit, once all the information is correct the Event committee can then proceed to Submit the Event where it will be Processed further by the Event Committee.

Click Submit.

Once the Event has been submitted the approval status in the Event list will change from "Tentative" to "Pending"

7 - Finance Decision, for Finance Approval the Event Committee member should be able to click the button.

Stage 4
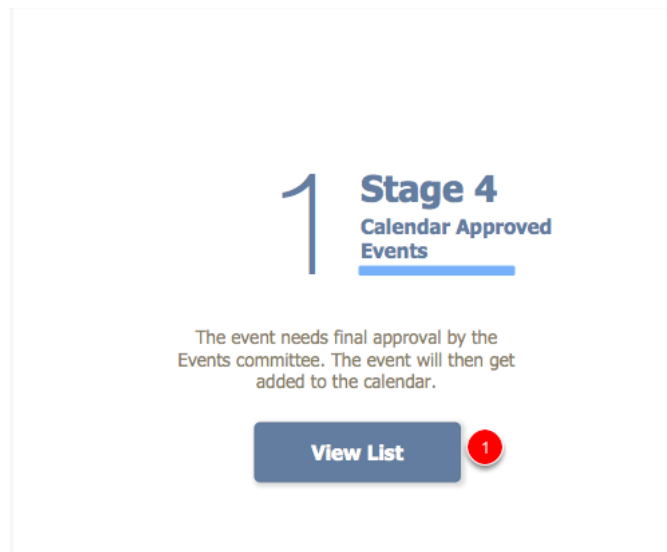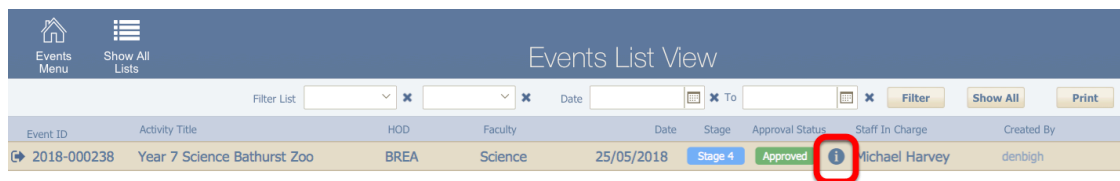
Once Finance has been approved, the Events Committee can now give the final approval for the Event to take place in Stage 4.
 1 - View List, this button should be chosen to allow the Event Committee member to identify which Event events still need further approval.

As can now be seen the Event event that was approved in stage 3 by the Event Assistant will now become visible in the Event List within Stage 4.The Approval Status has also been updated to "Approved". If the Finance was not approved it will not go to stage 4 instead the Event event will go back to stage 2 for the HOD to further inspect what the reason was for the event to be declined and if possible amend it so that it can be approved.

Special Expenses Review

Once the push button has been selected to take you to the specific Event the Event committee member will be displayed with the following page, this is the same page that the Event Assistant, HOD and Teacher edited. The purpose of the Event Committee is to review the information, make sure all the expenses are in order and have been accounted for and ensure that all the appropriate documentation such as the "Risk Assessment" are available for view.

Student Selection Review

The next page will take you to the student Selection where the Event Committee member can review the Attending Student List

Staff Selection Review

Staff Selection should also be reviewed in the next step.

Catering Numbers Review

Logistics Review

Event Costs Review

Event Approval

Once the Event Committee member has gone through all the steps that the previous staff members went through, and have reviewed all the presented information making sure that it is satisfactory. The user can then click the "Final Decision" button which approves the Event to take place. The event will then move into stage 5 which can be seen in the step below.

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Stage Approval

Cancel
Cancel the approval process

Event No. **000238**
Staff in Charge: **Michael Harvey**
Current Stage: **4**
Calendar Appointment ID: **144**

Event Title   Year 7 Science Bathurst Zoo Excursion

Staff   DENB   Jane Denbigh

Reason/ Comment

Approval Log

Approval Staff	Date	Stage	Status	Reason
DENB	10/05/2018	Stage 3	Approved	All Ok.
DENB	09/05/2018	Stage 1	Provisionally	Depending on the

Declined   **Final Approval**

Which online Calendar

A

| 2018-000238 | Year 7 Science Bathurst Zoo | BREA | Science | 25/05/2018 | Stage 4 | Approved | Michael Harvey | denbigh |

Stage 5

1 **Stage 5**
Evaluation

Once an event has past, a series of review questions need to be answered.

View List   1

Once the Event event has taken place Staff member involved is required to complete Stage 5 of the Event Interface. Stage 5 is associated with survey typed questions aimed at reviewing the Event experience.
1-(View List), Click on View List to display all Event events in Stage 5 awaiting select the Event specific for the user.

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Evaluation Questions

The user does not need to be in any particular group to be able to edit this page. (Configuration page 34)
Once the user has filled out the necessary information they may proceed to click "next"

Configuration and settings for Events

Go to the Configuration

Set the permissions for each Staff member
Boarding School - Yes or No
Email configuration for HTML

Set the Costs configuration.

Stage 1 - 2 Email set up.
Text for Emails for Submission, Approval, Staff and Committee Approval.
Test email address field to use to sending emails when doing tests.

Stage 3 email set up. Email Address fields are for any specific email address for a department instead of using a particular staff member.

Email Text for Approvals and Email address for specific approvals.

Resource Emails and specific email address fields.

Cancel and/or declined emails.

Questions

Evaluation Questions
1 - Default questions
2 - Edit default questions for any Event. Go to the Event and then come here to change the questions.