

# Tyler's VersaTrans e-Link User's & Administrator's Guide

*VersaTrans e-Link*® 9.13

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# Telephone Support

Toll-free Telephone Application Support is available by calling 800.775.5556.

# E-mail Support

Application Support is also available via e-mail at: <u>versatrans.support@tylertech.com</u>.

# Online Support

Online Application Support is available via: http://broker.gotoassist.com/h/versatrans.

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The Licensee will be solely responsible for the purchase, installation and maintenance of all hardware meeting VersaTrans' hardware specifications as they shall exist from time to time including, but not limited to, providing a clean, safe environment and voltage protection.



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# Chapter 1

# Introduction to VersaTrans e-Link

# Topics In This Chapter:

What is VersaTrans e-Link?, 2
Navigating the VersaTrans e-Link Pages, 4
Before Installing VersaTrans e-Link, 10

# What is VersaTrans e-Link?

Welcome to Tyler's VersaTrans e-Link, a browser-based program that provides you with access to VersaTrans RP routing information on-line. VersaTrans RP is the state-of-the-art bus routing and planning software system used by school districts and bus companies. School secretaries, administrators, teachers, parents, students, and even real estate professionals can use VersaTrans e-Link to locate bus stops, check travel times, find the address of a particular student, and generate lists of students by school, grade or other criteria. The system administrator controls who sees what information in VersaTrans e-Link to ensure there is no unauthorized access to the routing and student information. The system administrator sets the security for all of the users with access to this information.

While VersaTrans RP can work without VersaTrans e-Link, e-Link is completely dependent upon VersaTrans RP for the student and bus routing information it displays.

# Overview of Conventions Used in this Manual

To make it easier, we follow some typical Windows and browser system conventions throughout this manual to assist you in using and administering VersaTrans e-Link. The layout of this manual is fairly straight-forward and the table of contents and index are comprehensive.

### **Button Conventions**

Where ever possible, we use the button face to indicate the buttons. For other buttons that we use all the time, we bold them like this OK, CANCEL, SAVE, etc. so they stand out.

### Path Conventions

In this manual you always know where you are. We begin all of our instructions with a "Path:" entry that takes you from wherever you are to the screen we are talking about. If you are already in the screen, you can ignore the path. The information in the URL line in our screen is specific to our installation of VersaTrans e-Link. Do not try to enter that information into your URL line as you will get errors!

# Getting Technical Support

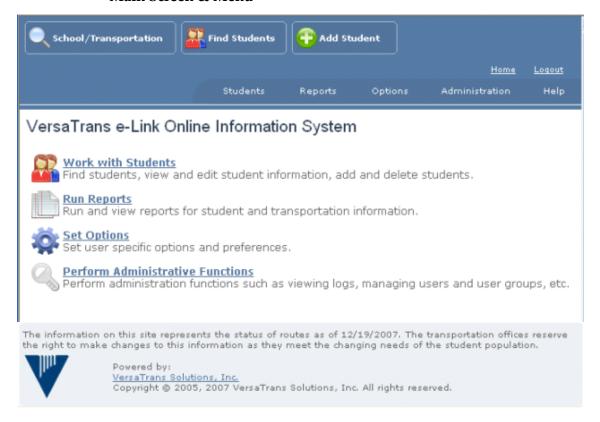
As always, Tyler's VersaTrans Solution is committed to your success. If you have checked the Help system and consulted the manual and you still need assistance, do not hesitate to call us!

Technical support is available Monday through Friday, 8:30 a.m. to 7 p.m., Eastern time year-round. You can call us at: 1-800-775-5556 or E-mail us at versatrans.support@tylertech.com.

# Navigating the VersaTrans e-Link Pages

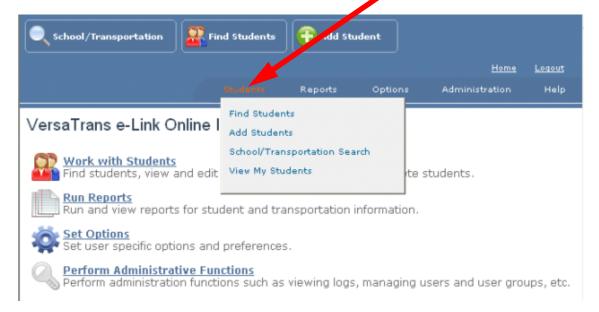
If you are familiar with your browser, you will find VersaTrans e-Link easy to use. After you log into the VersaTrans e-Link user site, the Main Screen and Menu displays.

#### Main Screen & Menu



From this screen, you have access to the entire VersaTrans e-Link user site. What the users see depends upon the user group permissions granted by the system administrator.

You move the cursor over a menu item (Students, Reports, etc.) to display a menu containing a list of options.



To select a menu option, move the cursor over your selection, so that the text is highlighted in gray and the cursor is hovering over the actual text.

**Note:** If the cursor slides off the menu, the menu will disappear. Move the cursor back over the menu item to display the menu again.



Displays the School/Transportation search screen where you can enter pertinent grade, program, and address information and retrieve relevant transportation information.



Displays the Student Search screen where you can find, retrieve, and edit student information.



Displays the Add Student screen where you can add a new student.

#### Students

This option allows users to search for a particular student's record, edit student information, add a new student in VersaTrans RP, and perform a school/transportation search.

# Reports

This option allows users to print reports about students or transportation information, (i.e. Student List Report and Route Stop Locations Report).

# **Options**

This option allows users to select a new password, and, if your group has permission, switch the student file.

#### Administration

This option allows you to access the most often used administrative functions of VersaTrans e-Link.

# Help

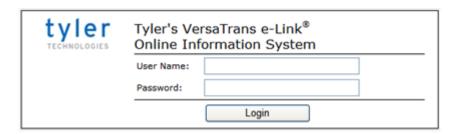
This option allows you to display a context sensitive help file. You can click the entries in the Contents or Index tabs for more information about VersaTrans e-Link or type a word in the Search tab to display topics that are related to your question.

# Logging Into VersaTrans e-Link

When password retrieval is enabled using the VersaTrans e-Link Administration Utility (Options > System), VersaTrans e-Link will require an email address that can be used to provide password retrieval. Upon login, if no email address is detected for the user account, a password retrieval dialog will be displayed. Completion of the password retrieval information is not required in order to use VersaTrans e-Link. However, the password retrieval dialog will continue to be displayed each time the user logs in until a valid email address and security question is entered.

### To log into VersaTrans e-Link:

- Launch the software/web browser that you use to access the World Wide Web.
- 2. Enter the VersaTrans e-Link URL and go to that address. The VersaTrans e-Link Login dialog displays.



3. Type your User Name and Password in the fields provided and click Login

If you have enabled password retrieval and an email address is not detected for the user account, the Setup Password Retrieval dialog is displayed.



- 4. Enter a valid e-mail address where you want your password sent in the event that it is forgotten.
- 5. Enter the same e-mail address again in the **Confirm Email** address box.
- 6. Click the drop-down button in the **Choose Security Question** box to display a list of security questions. Choose a security question.
- 7. Enter an answer for the security question in the **Answer Security Question** box.
- 8. Click Save . The VersaTrans e-Link Online Information System screen displays

# Retrieving a Lost Password

In the event that you forget your password, it can be retrieved if you have enabled password retrieval using the VersaTrans e-Link Administration Utility (Options > System) and then entered the information for password retrieval as outlined in *Logging Into VersaTrans e-Link* on page 12.

### To retrieve a lost password:

- 1. Launch the software/web browser that you use to access the World Wide Web.
- 2. Enter the VersaTrans e-Link URL and go to that address. The VersaTrans e-Link Login dialog displays.



3. Click forgot password.



- 4. Enter and confirm your e-mail address.
- 5. Click Search

In order to ret question:	rieve your password, please answer the following
Question:	What was your first car?
Answer:	
Retrieve Pa	ssword

6. Enter the answer for the security question.

7. Click Retrieve Password

### Your password has been sent to your email address.

You will receive an e-mail message similar to the one below containing you password.

Thank you for requesting the password to your VersaTrans e-Link user account registered to this email address.

The password is: SPRINGTIME

This email is never sent unsolicited. This request was initiated from the following IP address: 10.0.0.158

If you think you've received this email in error, please contact us at: 533-1873



# Chapter 4

# Using VersaTrans e-Link

# Topics In This Chapter:

Working with Student Records, 68 Generating User Reports, 90 Managing the User Options, 96

# Working with Student Records

Welcome to VersaTrans e-Link! This section provides support to VersaTrans e-Link users who want to work with student records in the VersaTrans e-Link system. It shows you how to use the VersaTrans e-Link system to find, add, update, and delete student records. If you do not see the menu options listed in these instructions, please check with your system administrator to ensure you are part of the appropriate user group.

The VersaTrans Suite is a full service school information solution for bus routing, planning, and data sharing.

# Using the School/Transportation Search Feature

The School Transportation/Search feature allows you to display a student's bus assignment. You can perform a simple search by entering a grade and an address or you can perform an advanced search by entering grade, school, home, pickup, and dropoff address.

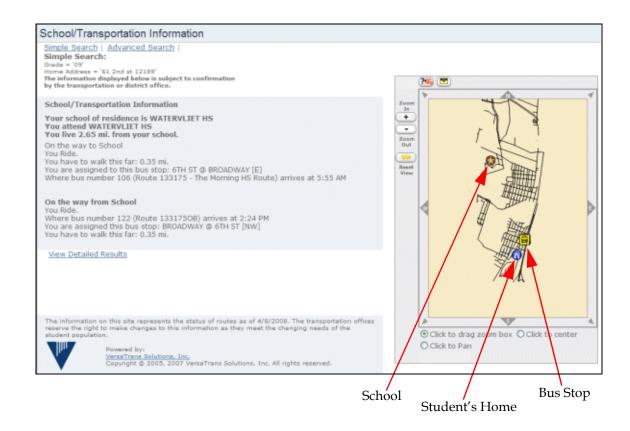
# Using the Simple Search

To find a student's bus assignment using the simple search:

Path:) Students > School Transportation/Search

- 1. The system default is the simple search. If the Simple Search link is displayed, click on *Simple Search*.
- 2. Select the student's grade from the *Select a grade* drop down list.
- 3. Type the student's *House* #, *Street*, and *Zip Code* in the appropriate fields.

4. Click Find School/Transportation Info . VersaTrans e-Link retrieves the pertinent transportation information including the VersaTrans RP routing map.



To learn how to manipulate the map see *Manipulating the Map and Viewing Area* on page 7.

5. You can click the View Detailed Results link to display more detailed transportation information.



# Using the Advanced Search

To find a student's bus assignment using the advanced search:

Path:) Students > School Transportation/Search

- 1. The system default is the simple search. Click on *Advanced Search*.
- 2. Select the student's grade from the *Grade* drop down list.
- 3. Select the student's school from the *School* drop down list.
- 4. Select the student's program from the *Program* drop down list.
- 5. Enter the student's *Home, Pickup and Dropoff Address* in the appropriate fields.
- 6. Click Find School/Transportation Info . VersaTrans e-Link retrieves the pertinent transportation information.

# Using Existing Student Data to Perform a Search

As an alternative to the default School/Transportation Search functionality, you have the option of using existing student data to perform the search. The use of existing student data can provide increased accuracy for School/Transportation Search results.

To gain access to this functionality, a district must contact VersaTrans Technical Support to receive a special registration code. Please have the registration code available before proceeding.

# To use existing student data to perform a search:

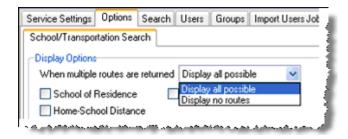
Path:) Start > Programs > VersaTrans Suite > e-Link RP

- 1. Select the VersaTrans e-Link Administrator Utility.
- 2. Click the Service Settings tab.

# **Display Options**

### When multiple routes are returned

When entering a grade/address combination that would qualify as a curb-to-curb stop, the School/Transportation Search can return multiple routes in an exact address match when there are multiple bus routes passing the house address. A school district can limit the routes that are displayed by selecting 'Display all possible routes' or 'Display no routes' when multiple routes are returned. This option defaults to 'Display all possible'.



Selecting 'Display no routes' will cause the system to omit the routes from the results display. All other fields, including bus stop information will be displayed and will not be affected by this display option.

# Finding a Student in VersaTrans e-Link

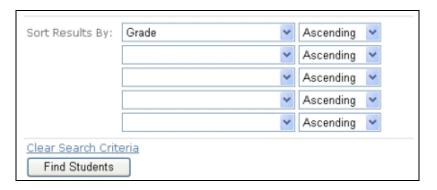
The Find Students option allows you to access a student's record by performing either a basic search or an advanced search.

To find a student record using the basic or advanced search:

# Path:) Students > Find Students

1. Follow the path above to display the Student Search screen.

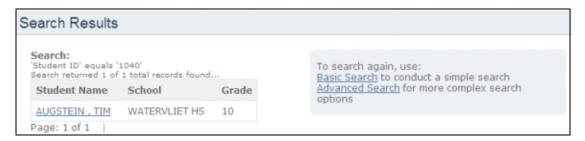
- 2. The system default is the basic search. If the Basic Search link is displayed, click on *Basic Search*.
- 3. Type student information in the fields provided and/or use the drop-down lists to select student information.
- 4. If you want to enter more specific criteria, click the Advanced Search link. For each parameter, you can select a field, operator, and value.
- 5. click Add a parameter to the search criteria. You may specify additional parameters, using logical operators.
- 6. Click the SORT RESULTS By drop down list to display a list of sort options and select the desired sort option.



- 7. Select Ascending or Descending. The results will be displayed accordingly.
- 8. Click Find Students . The system displays the Student Search Results page. If your user group is restricted to viewing students from a specific school, that school name will be the default.

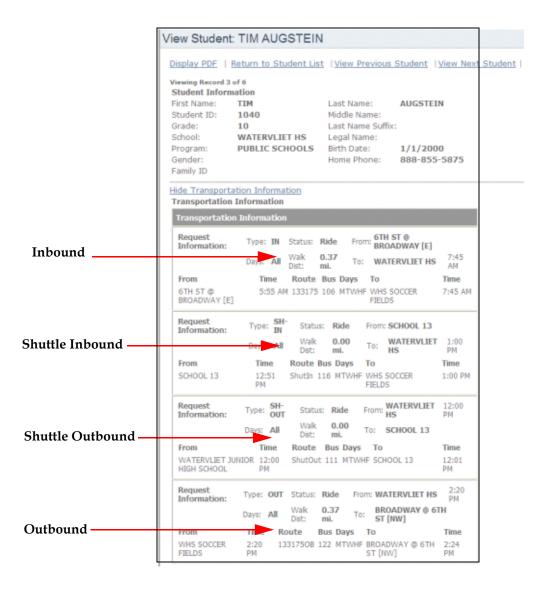
**Note:** The maximum number of records returned is 200. If your search generates more that 200 records, it is recommended that you further narrow your search criteria.

The following is an example of the results displayed from a Student Search:



9. For more information about a particular student's record, click on the student's name.

e-Link displays the basic information for that student in the View Student Information screen. This screen is read only.



10. Click the *Show Basic Information* link to expand the screen and display information including info fields and emergency contacts for the selected student.



# Saving and Editing a Filter

Depending on the filter rights that your administrator has set, you can have the ability to save a new filter or edit an existing filter for both basic and advanced filters. The process for saving and editing a filter is the same for both the Find Students and Student List Report functions in both the basic and advanced filters.

#### To save and edit a filter:

Path:) Students > Find Students

#### OR

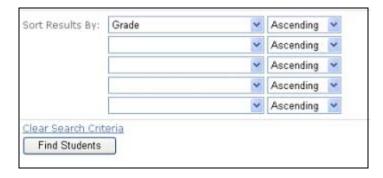
### Path:) Reports > Student List Report

1. Follow the path above to display the Student Search screen.

Before you can save a filter, you must first create the criteria for that filter. You can create the criteria for a filter from scratch or you can use the criteria of a filter that has already been saved.

2. Perform steps 1 thru 7 in *Finding a Student in VersaTrans e-Link* on page 77 to create filter criteria from scratch or populate the search window with criteria from a saved filter as described in *Using a Saved Filter* on page 83.

The following screen is an example of the search screen populated with search criteria.



3. If this criteria came from an existing filter, you can remove or add criteria as desired.

4. When you are finished adding or removing criteria, click Save Filter Criteria



- 5. If you have used an existing filter, you can either enter the name of the exiting filter which will write over that filter with the new criteria or you can create a new filter by entering a new name for the filter.
- 6. Click on the Type drop-down button to display the 3 available types:

### Group

Viewable by all users with the same user group as the creator

#### Private

Viewable only by the creator

#### Public

Viewable by any system user with reporting privileges

7. Select a Type and click **OK** to save the filter.

# Using a Saved Filter

To use a saved filter:

Path:) Students > Find Students

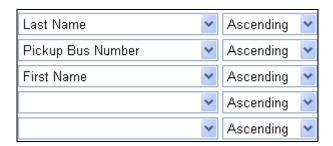
#### OR

## Path:) Reports > Student List Report

- 1. Follow the path above to display the Student Search screen.
- 2. Click on the SAVED FILTERS drop- down button to show a list of available saved filters.



3. Select a filer and click 60. The search screen is populated with the criteria from the saved filter.



4. Click Find Students . The system displays the Student Search Results page based on the criteria contained in the saved filter.

# Generating User Reports

The rights to generate user reports are granted by the system administrator. You can generate the following user reports:

- Student List Report
- Route Stop Locations Report

The Student List Report is a report that teachers and administrators might run to obtain a list of students and their pertinent transportation information.

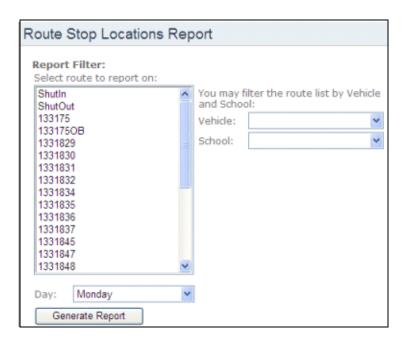
The Route Stop Locations Report shows all of the bus stops for specific routes. The report includes, bus number and/or route number, route number, bus driver, school, route description, route mileage, route time, bus stop name, time at stop, students at stops.

# Generating the Route Stop Locations Report

To generate the Route Stop Locations Report:

Path:) Reports > Route Stop Locations Report

1. Follow the path described above to display the Route Stop Locations Report (Selection) screen.

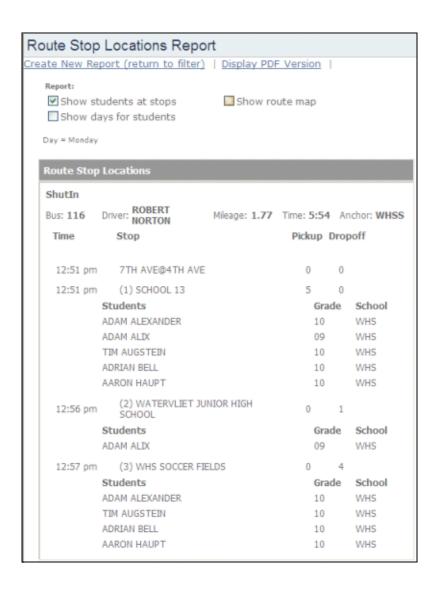


- 2. Select the route you want to report on.
- 3. Click the Day drop-down list and select a day.

You can filter the route list by Vehicle and/or School. If your user group is restricted to viewing students from a specific school, that school name will be the default.

4. Click the Vehicle drop-down list and select a vehicle and/or click the School drop-down list and select a school.

5. Click the Generate Report button to display the Route Stop Locations report.



- 6. If you want to show days for students, check this option and the report will be regenerated displaying that information.
- 7. If you want to display the routing map, check this option and the routing map will display.



To learn how to manipulate the map see *Manipulating the Map and Viewing Area* on page 7.

8. Use the scroll bar to move through the report. You can print this report by clicking the **DISPLAY PDF VERSION** link at the top of the screen.

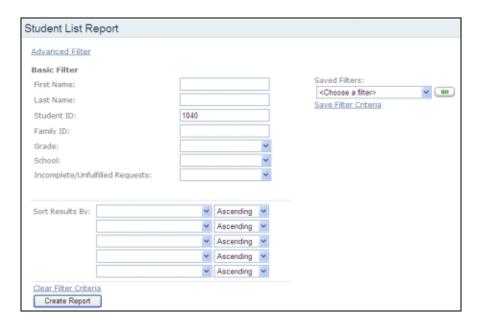
*Note:* The map is not part of the PDF, just text.

## Generating the Student List Report

## To generate the Student List Report:

#### Path:) Reports > Student List Report

1. Follow the path described above to display the Student List Report (Selection) screen.



2. Select the appropriate options in the fields provided and click

Create Report

**Note:** If your user group is restricted to viewing students from a specific school, that school name will be the default.

The system generates the report using the criteria you selected. By default, the report shows transportation information.

Student List Report								
AUGS	STEIN , TI	M Grade: 10	Home Phone: 888-855-5875					
Dir	Status	School	From	Time				
I	Ride	WATERVLIET HS	BROADWAY@6TH ST	7:19 am				
SH-I	Ride	WATERVLIET HS	SCHOOL 13	12:52 pm				
SH-O	Ride	WATERVLIET HS	WATERVLIET JUNIOR HIGH SCHOOL	12:00 pm				
0	Ride	WATERVLIET-HS	WATERVLIET HIGH SCHOOL	2:20 pm				

Shuttle Outbound Shuttle Inbound

- 3. If you want emergency contact information, check the *Show emergency contact information* box.
- 4. If you do not want transportation or emergency contact information displayed in the report, uncheck the desired option and the report will be regenerated without that information.
- 5. Use the scroll bar to move thru the list. You can click on a student's name to view detailed information for that student.
- 6. You can print this list by clicking the <u>DISPLAY PDF VERSION</u> link at the top of the screen.

## Managing the User Options

The user **Options** allow you to do following:

- Specify the number of records that display on each screen as the result of a student search and user search.
- Change your password.
- Switch student files.

You need special permission to change the password or switch the Student file.

## Specifying the Number of Records that Display

You can specify the number of records that are displayed on each screen as the result of a student search and user search.

To specify on-screen record display:

## Path:) Options > Preferences

- 1. Click Edit Preferences
- 2. Enter the number of records that you want to display per screen.
- 3. The maximum number of records is 200 per screen.
- 4. Click Save Preference

## Changing Your User Profile, E-mail & Security Question

You can change your system password, e-mail, and security question if your user group permissions allow you to.

#### To change your user profile:

## Path:) Options > Change User Profile

1. Follow the above path to display the Change User Profile page.



2. Complete the following fields to change your password:

#### Old Password

Type the old password in this field.

#### New Password

Type the new password in this field.

*Note:* Your password must be between 4 and 40 characters in length.

#### Confirm new password

Type the new password in this field to confirm your entry in the previous field.

3. Complete the following fields to change your e-mail:

#### Old E-mail Address

Type the old e-mail address in this field.

#### New E-mail Address

Type the new e-mail address in this field.

#### Confirm E-mail Address

Type the new e-mail address in this field to confirm your entry in the previous field.

4. Complete the following fields to change your security question:

#### **Choose Security Question**

Click the Security Question drop-down button to display a list of questions. Select a question from the list.

## **Answer Security Question**

Type an answer to the security question.

5. After you complete these entries, click Update User Profile . If there are no errors, the system displays the message confirming the change(s).

*Note:* Your password must be between 4 and 40 characters in length.

## Switching the Student File

You can change the student file you are working with, if your user group permissions allow you. You might want to switch your student file if you have created a new file with more up-to-date data in it.

**Note:** This change will only take effect for the duration of the session. The next time you log into VersaTrans e-Link the Student File will revert back to the Student File defined in your User Group.

## To change your student file:

## Path:) Options > Switch Student File

- 1. Click the *Switch To:* drop-down button and select the new file from the list that displays.
- 2. Click Switch Student File . If there are no errors, the system displays the message, *Student file switched successfully* at the top of the page.



# Glossary of e-Link Terms

## Α

#### About e-Link

This option gives users some build information about the VersaTrans e-Link application itself.

#### Add Student

Click this option to allow users in this group to add additional student records to the VersaTrans RP system (through e-Link).

## Admin (Menu Option)

This option allows you access to the administrative functions of the VersaTrans e-Link system.

#### Administrator

In e-Link, the System Administrator is responsible for handling user security and the global settings.

## **Administrator Rights**

These rights should be reserved for system administrators or other power users only.

C

## Change User Profile

Click this option to allow the users in this group to change their email address and security question if applicable.

#### Confirm Password

Retype the default password for this user record in this field.

D

#### Delete Student

Click this option to allow users in this group to remove student records from the student file. Use this option carefully, as deleting a student's record removes them from the database.

Ε

#### Edit Student

Click this option to allow users in this group to change VersaTrans RP student records in the system. Use this option carefully, as the changes these users make become a permanent part of the student's record.

F

## Family ID

On the Find Students screen, this allows you to look for all students with the same Family ID. When creating new users, specifying a Family ID restricts the user to viewing only students with that ID.

#### Find Student

This option allows users to search for a particular student's record in the VersaTrans RP system.

I

## Import Users from Student File

This option allows you to create student user accounts from the student file records to save time and effort.

L

## Logoff

This option allows users to close the VersaTrans e-Link system and log off the application.

M

## Miscellaneous Rights

These rights are neither student- nor administrator-specific rights.

0

## **Options (Menu Option)**

This option allows users to select a new password, and, if your group has permission, switch the student file.

P

#### **Password**

Type the default password for this user record in this field.

## Preferences

This user option allows you to specify the number of records that are displayed on each screen as the result of a student search and user search.

R

#### Reports

This option allows users to print reports about the information in either the student database or other information in the VersaTrans RP system.

## Route Stop Locations Report

The Route Stop Locations Report shows all of the bus stops for specific routes.

S

## School/Transportation Search

This option allows users to check bus stop information for a particular address.

## Session Time-out Length

In the web.config file, enter the number of idle time minutes you want to allow the user before logging them out of the system. You can think of idle time as the amount of time that elapses between when the user selects a screen and then selects the next screen.

#### Shuttle

A shuttle provides a student with transportation to and/or from a location which is not their school of attendance.

#### Student File

Select the Student File you want the User Group to use. All users who access the e-Link system will use the file you select here.

#### Student ID

On the Find Students screen, this allows you to look for the student with this ID. When creating new users, specifying a Student ID restricts the user to viewing only the student with that ID.

#### Student List Report

The Student List Report is a report that teachers and administrators might run to obtain a list of students and their pertinent transportation information.

#### Switch Student File

Allows users in this group to switch the student file itself. You might want to do this if you needed to view and possibly edit different student files.

U

#### **User Groups**

Select the user group appropriate for this user in this field. Make sure that this user requires the level you are granting!

#### User Name/User ID

Type the user name the user will use to identify him or herself to the system in this field. Usually, user names are emcelroy or mcelroye for Ed McElroy, but you are free to come up with your own naming convention. In fact, for security reasons, we encourage it!

٧

## View Activity Log

The activity log contains information about student record changes by VersaTrans e-Link users.

## View Admin Reports

Click this option to allow users in this group to view the administrative reports which are available in the Admin screen.

#### View Current Users

This option allows you to displays all of the currently active VersaTrans e-Link users.

## View Import Log

This log displays a history of users that were created through the "Import Users from Student File" option.

## View My Students

This option restricts the user to seeing only students that are associated with the Student ID and/or Family ID specified on their user account.

#### View Students

This option displays "All" the students in the database. USE THIS OPTION ONLY WHEN ABSOLUTELY NECESSARY!

W

#### Work with Users and Users Groups

Click this option to allow users in this group to view, add, edit, and delete users. USE THIS OPTION SPARINGLY!



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