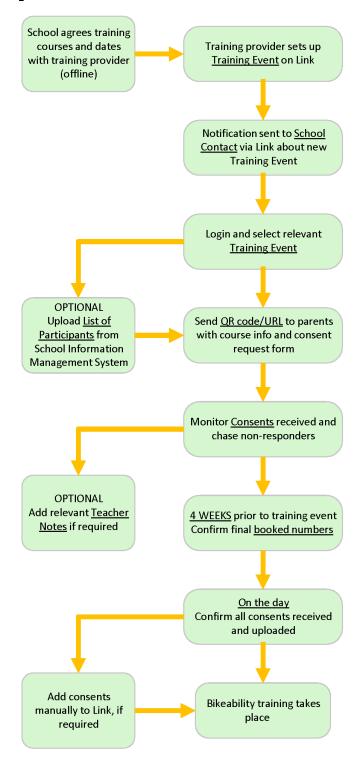


# Schools and Organisations Onboarding Pack Last updated: 4 June 2024

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# **End to end process overview**





# **Link User Guide** Overview

Link is the system used by The Bikeability Trust to administer cycle training. It is the central hub for all rider data and for training providers to monitor consents, training outcomes and feedback for riders.

The school/organisation login allows users to undertake the following functions:

- 1. Track consents received for Bikeability training
- Upload class lists from ESS SIMS to track consent response against list and allow The Bikeability Trust to gather rider characteristic data by aggregating information from the class list upload
- 3. Review consents received and add additional notes for instructors
- 4. Add last minute consents taken by the school on behalf of the parent
- 5. Add/remove school contacts
- 6. Confirm the final booked figures for the courses so that your local authority/training provider can be paid for the training.

# **School/Organisation Login**

When a training provider adds you as a host organization, you will be emailed credentials to login to the Bikeability Link system.

https://link.bikeability.org.uk/login

## **Two Factor Authentication**

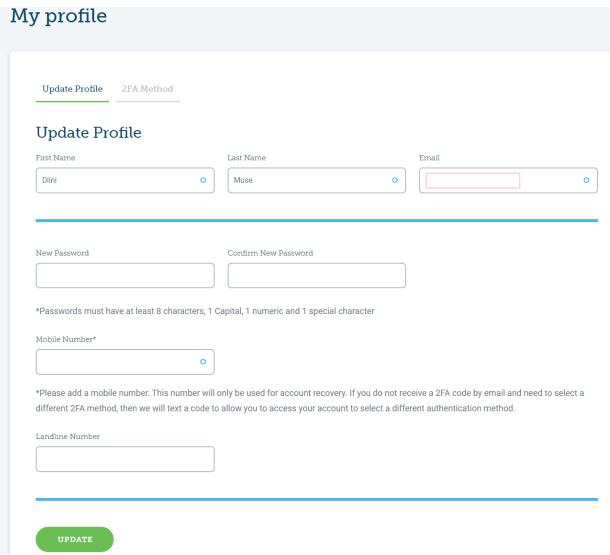
To protect data, access to the Link server requires two factor authentication. You may authenticate access using either Google Authenticator or by receiving an email with a Link to your email account. Google Authenticator is available from the Apple App Store or via Google Play. We recommend Google authentication if possible as this allows instant access. Simply scan the barcode displayed on Link to quickly set-up the app.

At first login, you will be asked to choose your authentication method and to change your password to one that conforms with our basic password requirements. Passwords must have at least 8 characters, 1 capital, 1 numeric and 1 special character. If your existing password does not meet these requirements, you will be asked to set a new password at first login.

Reauthentication is required at regular intervals or should you change your authentication method or attempt to login from a new device. Once you have set up your password and authentication method, you will be asked to sign in with an authentication code.

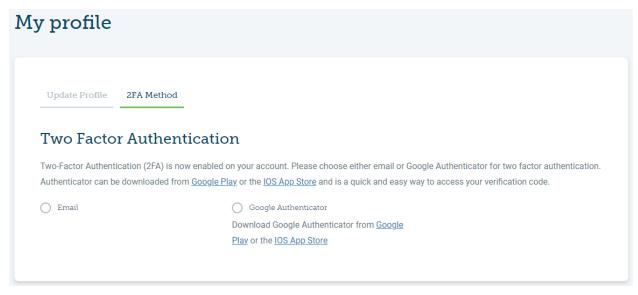
1. First update your password to comply with our basic password rules.





2. Then select your preferred two factor authentication method. We recommend using the Google Authenticator app as some organisations have aggressive antispam settings that can sometimes prevent 2FA emails from getting through. If selecting Google Authenticator, scan the barcode or enter the code to add your device and then provide the authentication code to complete set-up.





3. You will be automatically logged out once you have selected your validation method and will need to supply a verification code at next login.

# **Training Deliveries**

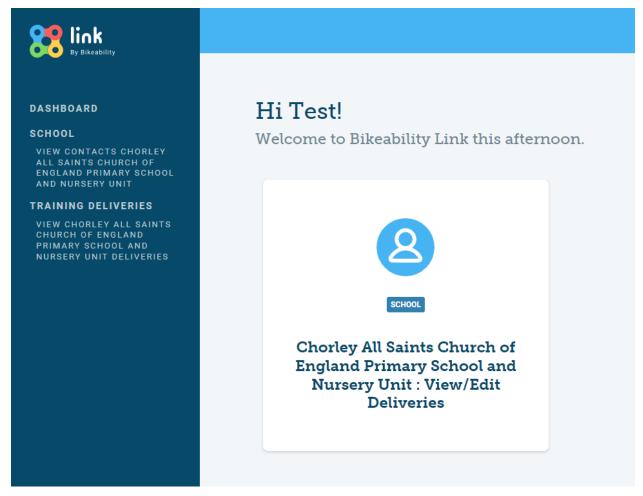
Use your log-in to access your Link school/organisation page.

Video: School login and course management

This video gives you a breakdown of school login, including where to find QR codes and how to confirm booked figures.

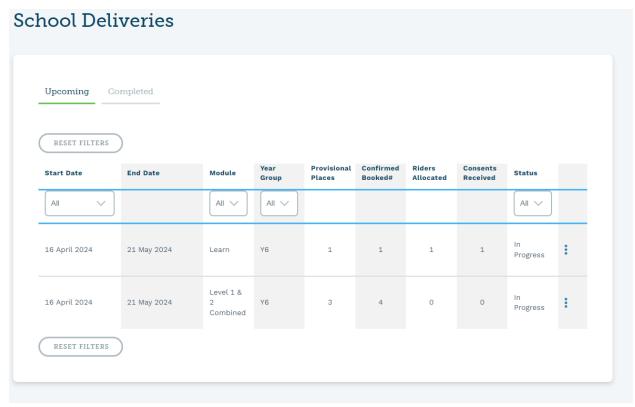
Please note: The screenshots presented display 'school' written on them, but the functionality will be the same for organisation. You can follow the screenshots below for guidance.





You will see all booked deliveries by clicking "View `School/Organisation name' Deliveries" on the left-hand side of the page menu.





You can view both upcoming and completed deliveries in this section, organised based on the dates entered during the booking process by your training provider.

When a training provider creates a training delivery for your School/Organisation it will appear on this list and status (far right-hand side of the screen) will show as 'Event Created'.

## **Confirm booked figures**

It is vitally important that schools confirm final booked figures as evidence of booking numbers. This confirmation is necessary for your local authority to claim a grant allowance per head.

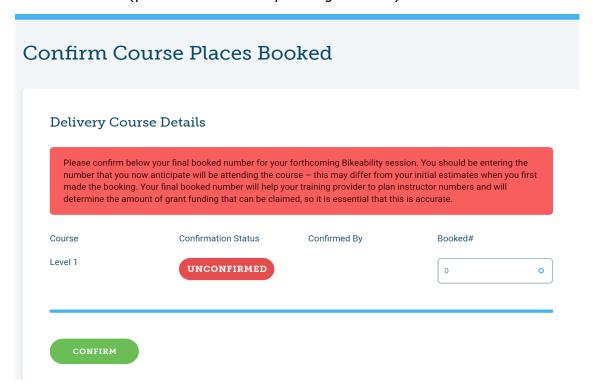
You can confirm your booked places no sooner than one month before the start date of a specific delivery up until the first day that the overall delivery event is due to start.

#### Video: - How to confirm booked figures

This tutorial video demonstrates how to confirm booked figures for School/Organisation attendance. Learn the importance of updating attendance figures and how to efficiently confirm the number of attending riders.

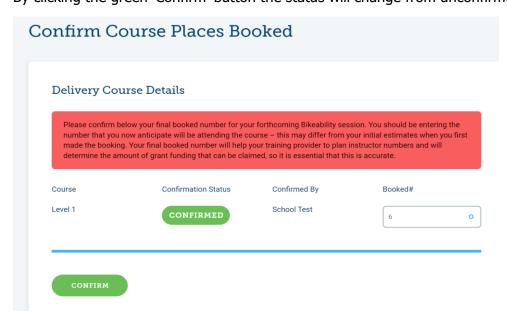


To confirm a new booking click on the three dots next to the 'Event Created' status and choose 'Confirm Booked' (you can view it first by clicking on 'View').



You can amend the number of places booked by typing in a number in the 'Booked' box.

By clicking the green 'Confirm' button the status will change from unconfirmed to confirmed.

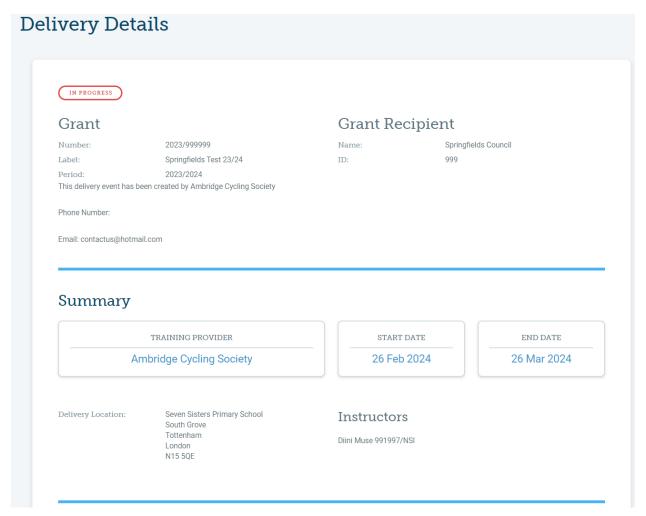


The status will change to 'In Progress' on the main delivery page when the delivery begins.



# **Delivery details**

Click on the three dots on the far-right side of a delivery and then click 'View' to get an overview of the delivery. There are tabs at the bottom of the summary screen with further information.



Please scroll down to see the QR codes



# **QR Code Tab**

To see the consent form scroll down and select the 'QR Code' tab. These are the links that will have been sent to parents. If you need to reshare, you can reshare the URL digitally or add the QR code to a letter that is sent home to parents.

QR Code Courses/Consents Riders/Consents

Parental Consent Link and QR Code

URL: https://consent.bikeability.org.uk/disk-gag-ooh



DOWNLOAD QR CODE (SVG FORMAT)

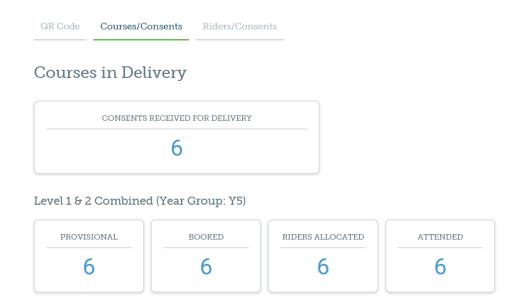
DOWNLOAD OR CODE (PNG FORMAT)

You have the option to download the QR code in two formats. SVG and PNG

# **Courses/Consents Tab**

The "Courses/Consents" tab provides a quick snapshot of your course bookings. Here, you can see the number of people who have booked, the riders allocated, and the status of consent forms - whether they've been given, refused, or are still outstanding.





# **Riders/Consents Tab**

The 'Riders/Consents' tab is your dashboard for managing all things related to riders and their consents. Here you have the facility to upload a rider list from SIMS if you use that system. The benefit in doing so is that you will be able to see consents matched against the class list that you upload and quickly and easily identify and pupils that have yet to receive consent. Upload of this data also automatically includes all of the rider characteristic data that the training provider will need to report on and this will automatically be aggregated for those riders that complete the training.

# Upload rider details from SIMS management systems

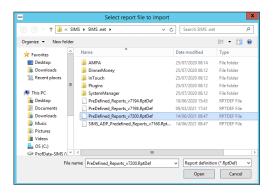
This functionality is not available for organisations

#### **Stage 1 - Save the Report Template**

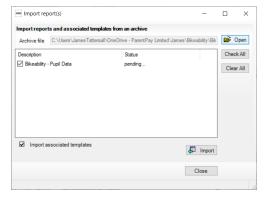
First step is to save the report template to a location on your computer.

### **Stage 2 - Importing the Report Template**

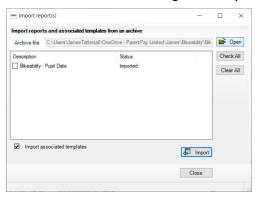
1. To import a report definition file, select Reports | Import.



2. In the Select report file to import dialog, click 'Open' and find the report definition file (as saved in Stage 1 in this document).



- 3. The report will be displayed in the Import report(s) dialog, with the word pending next to it.
- 4. Click the 'Import' button.
- 5. The selected reports will now have the Status changed to Imported.

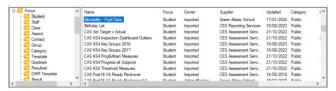


6. Click Close and the report has been imported.

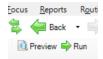
#### Stage 3 - Running the Report

- 1. Within SIMS, select Reports | Run Report
- 2. Click on the + symbol next to Focus and select Student
- 3. Within the list of reports scroll down until you see Bikeability Pupil Data

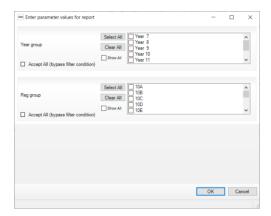




4. Click the 'Run' button above the list of reports.



5. Select the 'Year Group' and 'Reg Groups' required.



- 6. Click 'OK' to run the report
- 7. The Report will open in Excel.

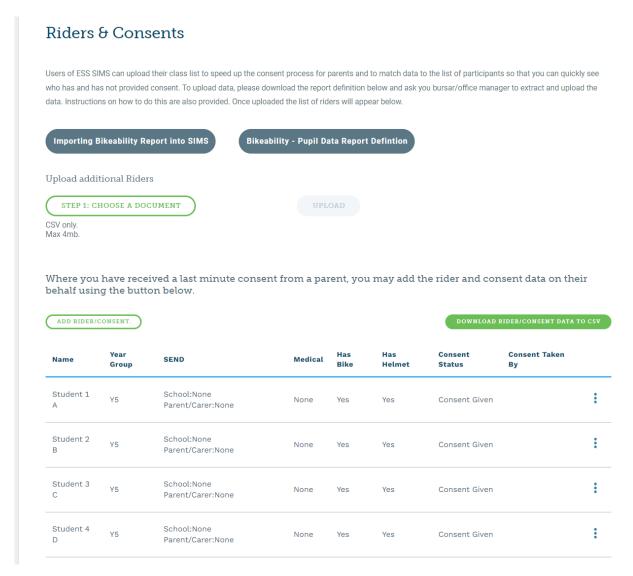
This data is now ready for import in to Link.

Video: How to upload SIMs data (Schools only)

This tutorial video guides you through the steps required to upload your SIMs data.



### **Riders and Consents**



Once entered, all rider details will be displayed below. This includes crucial information such as the rider's name, year group, any Special Educational Needs and Disabilities (SEND), medical conditions, bike and helmet status, and consent status.

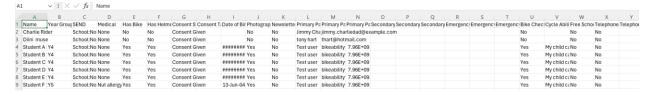
Individual rider information can be edited and teacher notes added which will be visible to instructors using the app. For example, a parent may not have declared a special educational need or a rider might need to be in a separate group from another rider.

#### **Downloading rider consent details**

To download a list or consents received for an event, first view the event that you wish to download information for. Click on the 'Riders/Consents' tab at the bottom of the screen and the 'Download Rider/Consent Data to CSV' button.



You can use the consent download data to organise riders in to groups and and present a list of riders to the lead instructor for each day. Individual instructors can then select the groups that they are working with using the Instructor App.



#### Add a manual rider consent

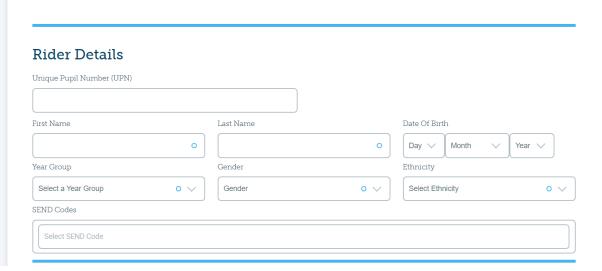
You might receive a last minute consent for a rider to take part in the course received perhaps be telephone/paper or email. You will need to manually add the rider to the system in order for them to take part in the training.

After you click on 'Add Rider/Consent', you will have to complete the entire consent form and click the 'create rider & consent' green button at the bottom of the page.

Video: How to add a rider

This tutorial guides you through the process of adding a rider to your School/Organisation's records.

# Create Rider for Delivery #68104





# Parent/Guardian Details & Emergency Contacts

First Name		Last Name	
	0		0
Phone Number		Email Address	
	0		0
Secondary Parent/Guardia	n		
First Name		Last Name	
Phone Number		Email Address	
Emergency Contact			
Contact Name	Phone Number	Relationship to Rider	



Overall Consent Given		
Test question 17		
	 Taken By	Consent Reason/Notes
Telephone Consent Given	C	0
Child Can Cycle	Door the Child have a Bike	Doos the Child have a Helmet
Child Can Cycle	Does the Child have a Bike	Does the Child have a Helmet
Has Bike been Checked?		
Does the child have special educa	ational needs, or disabilities?	
SEND Notes		
		A.
Is there any information that wou	uld be useful to help instructors cater for the ch	nild's learning needs?
is there arry intormation that wor	and be aseral to help histractors cater for the cr	ind 5 tearring receds:
Medical Notes		
Medical Notes		
Medical Notes Preferences		
Medical Notes Preferences	Join Bikeability Club?	Receive Training Provider e- newsletter and Join Bikeability Clul
Medical Notes Preferences	Join Bikeability Club?	newsletter and Join Bikeability Clul to Receive Bikeability Club e-
Medical Notes  Preferences  Photography Allowed?	Join Bikeability Club?	newsletter and Join Bikeability Clul
Medical Notes  Preferences  Photography Allowed?	Join Bikeability Club?	newsletter and Join Bikeability Clul to Receive Bikeability Club e-
Medical Notes  Preferences  Photography Allowed?  Notes	Join Bikeability Club?	newsletter and Join Bikeability Clul to Receive Bikeability Club e-
Medical Notes  Medical Notes  Preferences  Photography Allowed?  Notes  Teacher notes for instructors	Join Bikeability Club?	newsletter and Join Bikeability Clul to Receive Bikeability Club e-
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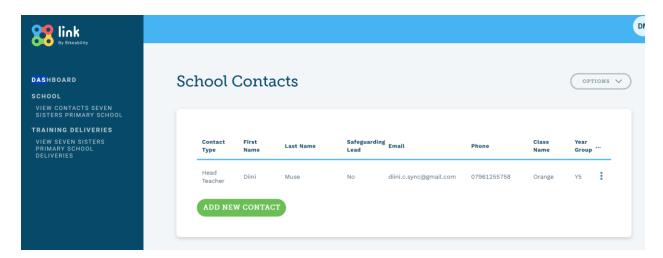


# **School/organisation contacts**

You can view, amend and add contacts to your school/organisation account by selecting the 'View Contacts' on the menu on the very left-hand side of the page.

Video: How to add and remove school contacts

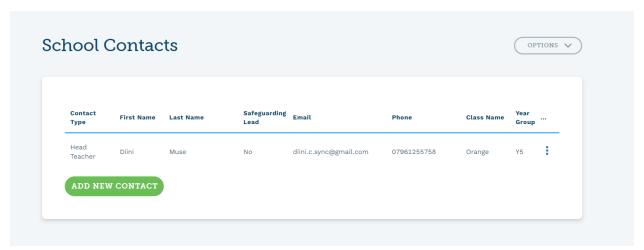
This tutorial video guides you through the process of adding and removing School/Organisation contacts efficiently.



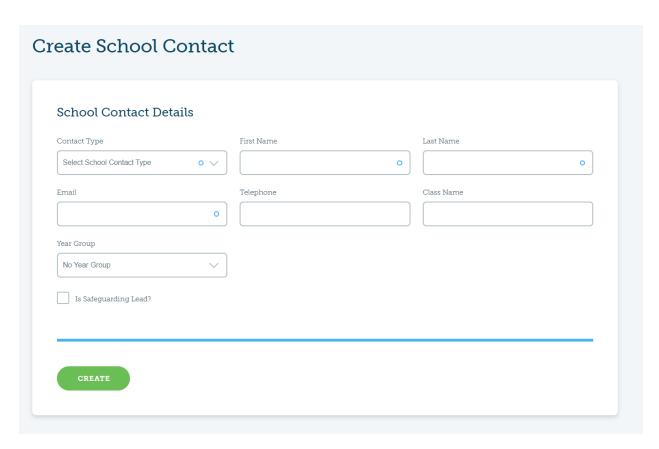
You can create a new contact on this page

### Create school/organisation contact

To set up a new contact, just click on 'Add New Contact'.

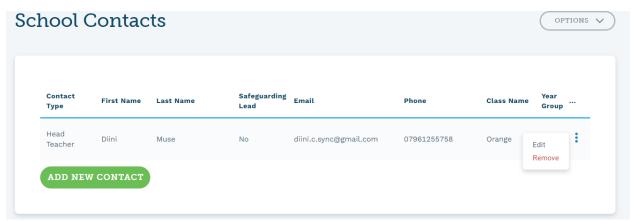


After clicking on 'Add New Contact,' you'll see fields for entering your contact details. Fill them out as required and once you're done, go ahead and press the 'Create' button to add the new contact to the list.



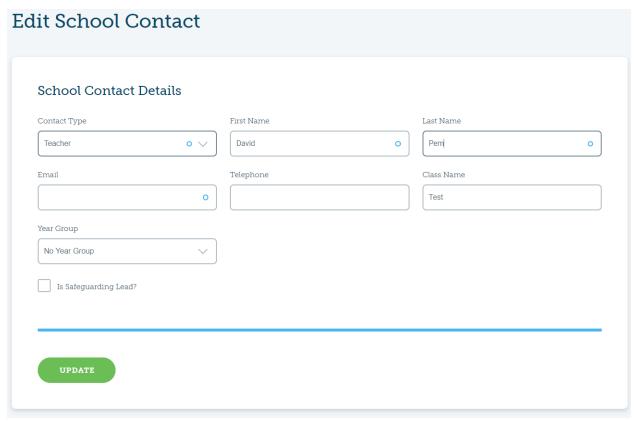
#### **Edit contact**

If you need to update any contact information click on the three dots on the right side of the contact and then select 'Edit' to make any changes you want.



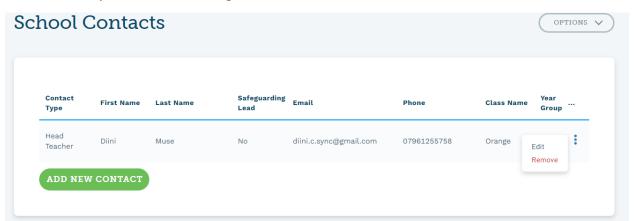
After you've made all the necessary changes ensure that the 'Update' button is clicked to save them.





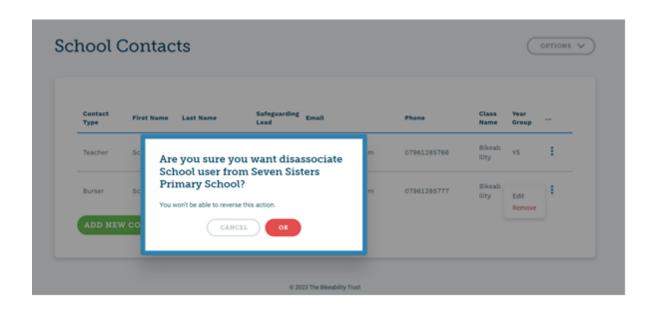
#### **Remove contact**

To remove a contact click on the three dots on the right side of their entry and click on them. You'll see an option to 'Remove'—go ahead and click that.

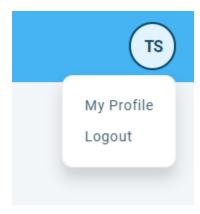


Press ok to remove.

It will ask for a reason for removing where you can type 'left organisation' or 'no longer Bikeability lead' or another reason for removing them.



To logout of Link or update your profile information including password, please use the top left menu.





# **Award Materials and Bikeability Club Award Materials**

We have redesigned our award materials to be more fun and engaging, and improved the quality of our badges. You may continue to use existing award materials, as we do not expect you to throw out or destroy current stock. Instructors will not need to complete the outcomes on the certificate, as these will be emailed using outcomes inputted on the Instructor App.

New certificates and stickers will shortly be available for purchase on our Shop. For any enquiries, please contact <a href="mailto:orders@bikeability.org.uk">orders@bikeability.org.uk</a>

Booklets are no longer available for purchase. Our website features <u>tips and advice</u> which were available in the booklet, and we have posted a variety of useful videos on our <u>YouTube channel</u> and website. Riders will receive further information by email and on the Bikeability Club.

# **Bikeability Club**

After the course has been completed, parents will be sent a unique URL to access their child's rider outcomes and instructor feedback, called the **Bikeability Club.** This website will include:

- Outcomes required for Bikeability course
- Standard achieved by rider
- YouTube example videos for each outcome
- Individual feedback from Bikeability instructor
- Digital course badge (in addition to physical badge and certificate received after course completion)
- Digital badges for activities, such as "I cycled up a big hill" or "I cycled with my family".
  These are self-reporting, so families can click to "claim" a badge once they have
  completed an activity. Badges will be sponsored by commercial partners and include
  unique offers for families to access.
- Links to additional resources, including how to become a cycling instructor and where to find your nearest cycling club

An example of the website can be seen here.









### **Welcome to Bikeability Club**

The area for riders who've taken part in Bikeability cycle training (and their grown ups!). Access your rider reports, earn digital badges, claim exclusive offers and more.

Well done Rider! You've taken part in Bikeability at Test Organisation (non school). Now it's time to continue your cycling journey.



# **More Badges**

Badges allow you to celebrate achievements you've made beyond Bikeability! Learn how to earn any badge by simply tapping on it, and don't forget to check out our exclusive offers from our partners too.





# **Feedback and Support**

Issues and feedback can be reported by an online form. The form is available for grant recipients, training providers, instructors and schools.

https://forms.office.com/e/CzjwAaYXYR

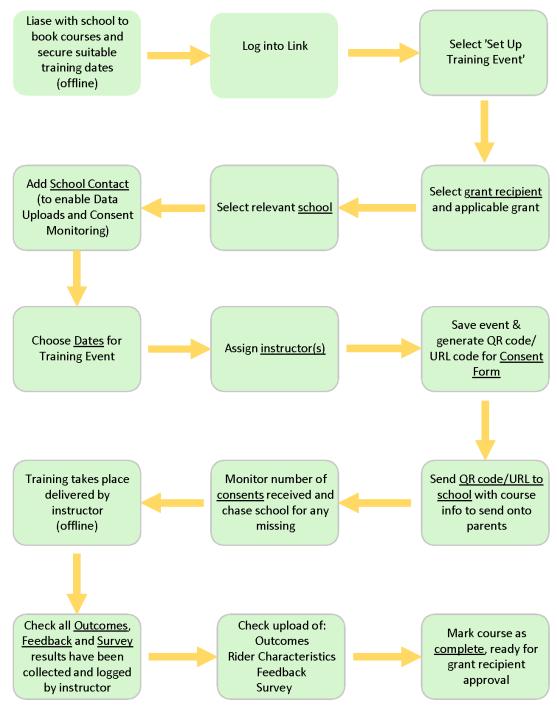
**Drop-in support sessions** will be available on Wednesdays between 2pm – 5pm. 30-minute slots will be available for grant recipients, training providers, schools and instructors.

https://calendly.com/simon-by0x/30min

https://calendly.com/diini-udbg/30min



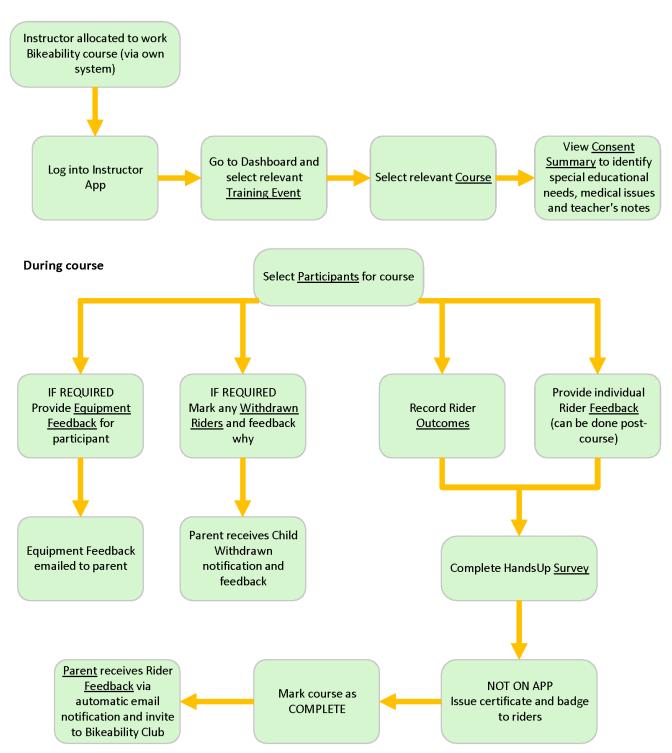
# **Supplementary documents Training provider user journey**





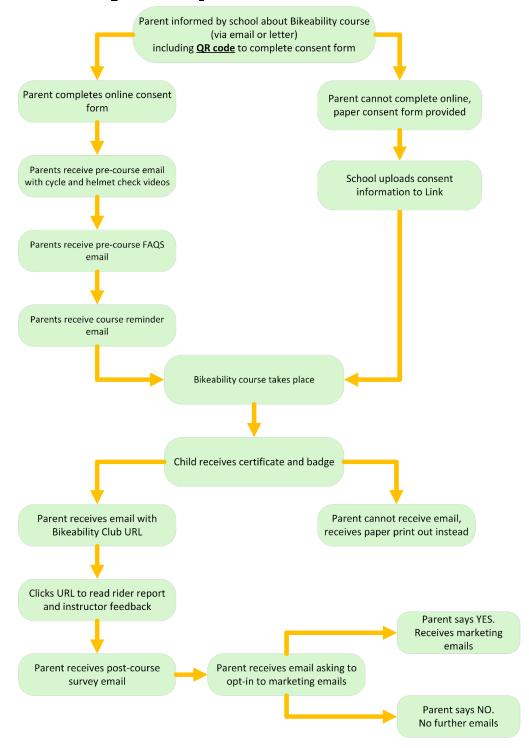
# **Instructor user journey**

#### Before course starts





# **Parent user journey**





## **GDPR**

# **Digitisation Data Sharing Role Diagram**

The law specifically defines different parties and the role they play when personal data is gathered and processed for any given purpose. Broadly, there are two roles and a party (any organisation including a sole trader or partnership) must understand which it is before any personal data is processed.

With reference to the Digitisation Data Sharing Role diagram, you will note that The Bikeability Trust acts as both a processor and controller as defined as follows:

A **data controller** is a party that determines why data is processed, what data may be gathered, the purpose for the processing activity, how long it may be retained and who it may be shared with. A controller of data must be registered with the <u>Information Commissioner's Office (ICO)</u>, have a policy and be responsible for all personal data it may use to achieve any given purpose it has identified.

A **data processor** is a party that processes data but only because it has been instructed to do so by another organisation acting as a data controller. It may only process the data in accordance with the instructions it has received. Typically, these instructions will be in an agreement. It does not need a data protection policy to guide it as the instruction provides the guidance. It may also be a data controller but for a different purpose. For example, The Bikeability Trust is a data controller for most of its activities, but for the purposes of providing access to the app, it is a data processor providing services to the training providers and instructors which include secure access to the personal data of children.

We have identified different roles where we make determinations or decisions about the data and where we don't. For example, where we store the data you upload to the Instructor App, we are not making any decisions, merely providing safe storage for you, and ensuring you can access the data you upload when required. In this way, we are a processor acting on your behalf as the data controller. However, where we may use the data to make determinations such as the effectiveness of the scheme, or for analytical or reporting purposes, we are the controller of the data. **A training provider will be a data controller**. For illustrative purposes only, an instructor who is a third party to a provider, is likely to be a data processor to the provider who will be the data controller. However, this can vary so if you are in doubt, you should take legal advice.

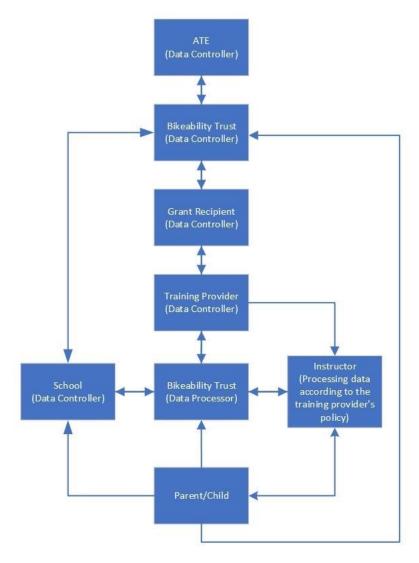
Where each party is a data controller they may process the data in accordance with their policy, the parties may also share such data with other controllers where it has established a clear purpose as defined in the diagram.

Each party must establish a lawful basis for processing the data. Such bases may be different depending upon the purpose that has been identified. There must also be a lawful basis to share the data with another party to the agreement.

A controller to processor agreement between the training provider and the Trust, should be in force. Where the Trust acts as a processor the UK GDPR Article 28 processor clauses should be



included in the contractual agreement. A controller-to-controller data sharing agreement should also be in force between the training provider and school.



# Flow Diagram Roles and Explanations

#### **Data Processors**

#### The Bikeability Trust

For the purposes of providing the Instructor App. The Bikeability Trust's responsibilities include securely storing the data uploaded and ensuring access to the data for all authorised parties. They do not determine what data is uploaded. In this case, they are the data processor who is working on behalf of the controller who use the Instructor App.



#### **Instructors**

Instructors are responsible for delivering Bikeability training and follow the instructions of the training provider, for example, the date training will be delivered. This makes the instructor a data processor. The associated training provider is responsible for making sure the instructor has appropriate instructions.

#### **Data Controllers**

#### **Active Travel England**

Active Travel England processes personal data to determine the outcome of the project. Information may be anonymised, this information is not applicable to the law.

#### **The Bikeability Trust**

The Bikeability Trust measures the progress of the project and determines the best way to achieve various objectives connected to the project.

#### **Grant recipients**

The grant recipient decides how to deliver the training and who will deliver it.

#### **Training providers**

The training provider decides how best to meet its obligations when delivering Bikeability training. Making these decisions make the training provider a data controller.

#### **Schools**

For the purpose of ensuring children and their parents/carers can access the course information. They may determine who attends the course and when.

#### **Parents/Carers and Child Riders**

The parent/carer and child rider are not subject to data protection law. They are neither a data controller or data processor. Any personal data they handle or share is referred to as "domestic" use. However, they do have UK GDPR information rights that all parties must uphold.



# **Offline documents/ Paper templates**

There may still be circumstances where a parent is unable to complete a digital consent form. A paper based template is provided for that purpose. Please ensure that the information is added to Link through your school login so that the Bikeability instructors can record course outcomes and feedback for the riders. Riders can only be added via the school consent login or via direct response to the consent form.

Consent Form: download PDF to print

Training providers are required to submit rider characteristics for each course that they run as a condition of receipt of grant funding. They may wither collect this data directly during consent or may ask you directly for the information, in which case the Rider Characteristic Form can be completed and given to your training provider.

Rider Characteristics' Form: download PDF to print