Trips Assist

User Guide

Mr. M. Thirkell
SCHOOLWORKSPACE LTD
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Getting Started

Thank you for choosing the Trips Assist Module. This module is part of a suite of modules offered by **SchoolWorkSpace (SWS)** for educational institutions, which also includes modules for Exams Assist, Attendance Tracking, Room Booking, Parents' Evening, Gradebooks, Homework, and Seating Plans.

Data Sharing

SWS supports various MIS systems, including SIMS, Bromcom, Arbor, ISAMS, and Go2Schools. The available data and features may differ based on the system your School uses. A list of currently supported data from each MIS can be found at the following webpage: https://schoolworkspace.co.uk/help/MIS. As the data controller, the educational establishment retains control over what data can be shared with SWS. To review the data being shared or to select additional options, navigate to **School Settings | Data**.

MIS Data Sharing

Allocating Access to School Staff

Before staff can use the Trips Assist Module, they must be assigned to the appropriate security groups within SchoolWorkSpace. Navigate to **School Settings | Staff Roles**. The staff members who have synchronised from the school's MIS will appear. To access SchoolWorkSpace the teaching staff will need to be assigned to the **Teacher Security Group**. For staff who will be managing the module they will need to be assigned to the **Trips Security Group**.



Note – To ensure staff emails are imported into **SWS**, they must be set as **Work** in the MIS and marked as **Primary** in SIMS. Alternatively, you can add another email address in SWS for staff to use for login.

Prerequisite – Email Delivery

Before sending communications through SchoolWorkSpace, ask staff, parents, carers and pupils to add the following addresses to their safe senders or approved contacts list:

- noreply@schoolworkspace.co.uk
- notifications@schoolworkspace.co.uk

This can help reduce the likelihood of messages being placed in junk or spam folders.

Note — Adding an address to a safe senders list does not guarantee delivery. If a message is not received, check the recipient's recorded email address and ask them to check their junk or spam folder. For school email accounts, the school's IT team may also need to check its email filtering settings.

Viewing Email Addresses in SchoolWorkSpace

Before sending messages, schools should check that the email addresses held for students and parental contacts are complete and accurate.

Navigate to **School Settings | Other Settings**, then select either:

- **Students** to review student email addresses.
- **Parental Contacts** to review parent and carer email addresses.

The information displayed can be searched and filtered to help identify particular students or groups. Within the **Students** tab, the **No Email Address** option can be used to identify students for whom no email address is recorded. The **No Send** option identifies students who have been excluded from receiving communications.



To download the information for further checking, select **Download** and choose the relevant Excel option, such as **Student Email Addresses Excel**. The exported spreadsheet can then be reviewed to identify missing, duplicated or potentially incorrect addresses.

Any corrections should be made within the school's source MIS and allowed to synchronise with SchoolWorkSpace before messages are sent.

Important - Schools should also check parental contact priorities and communication permissions to ensure messages are sent only to the correct and authorised recipients.

Creating and Configuring a Trip or Event



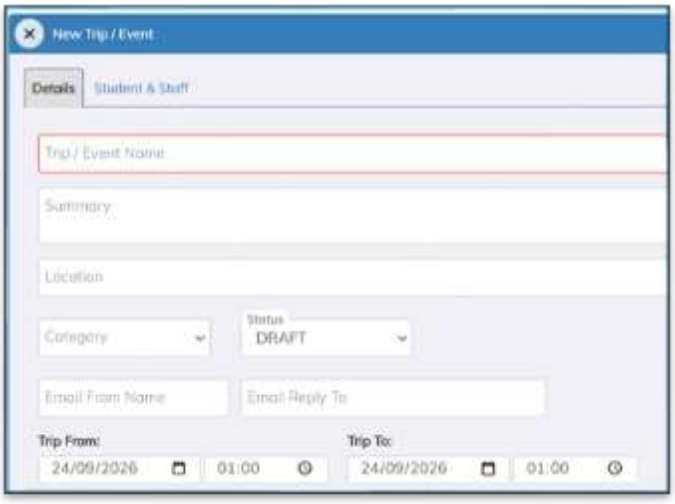
Watch Video – How to Setup a School Trip

Trips Assist allows staff to create and manage school trips and events. This could include residential visits, day trips, educational visits, sporting fixtures, competitions or other activities taking place away from the normal school timetable.

To create a trip or event, navigate to the **Trips Assist Module** and select **Add**. The new trip or event will initially have a status of **Draft**, allowing its details to be completed and reviewed before approval.

Basic Trip Information

- **Trip/Event Name** – Enter a clear and recognisable name for the trip or event. This will help staff, students and parents identify the trip and may also appear in invitations and other communications.
- **Trip Summary** – Enter a brief description of the trip, including its purpose and any important introductory information. This helps staff reviewing the trip understand what is being proposed.
- **Trip Location** – Enter the venue, destination or location of the trip. This ensures that staff, students and parents know where the trip will take place.
- **Category** – Select the category that best describes the trip or event. Categories help the school organise, search and report on different types of trips.
- **Trip Status** – Displays the current stage of the trip, such as **Draft** or **Approved**. New trips are automatically set to **Draft** and must be approved before invitations can be sent.
- **Email From Name** – Enter the name that recipients will see as the sender of emails relating to the trip. This could be the **School Name**, department or trip organiser.
- **Email Reply To** – Enter the email address to which replies should be sent. This ensures that questions from parents, students or staff reach the correct staff member.
- **Trip From** – Enter the date and time when the trip or event is due to begin.
- **Trip To** – Enter the expected date and time when the trip or event will end.



Note: Ensure that the trip details are entered accurately, as some of this information can be inserted into descriptions and communications using **mail merge tags**. The trip start and end times are particularly important, as they determine when official roll calls can be completed.

Organising Participants Using Subgroups

When trips are created, Schools can assign each student and staff member to an option within a subgroup. Common subgroup types include **Bus Number**, **Trip Group Number**, or **Hotel Room Number**.

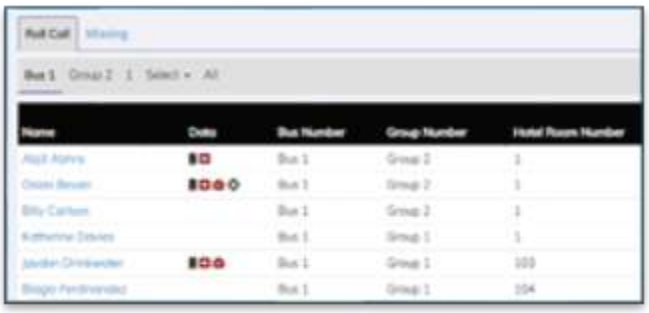


Each student or staff member can be assigned to an option within a subgroup. When staff access the trip, they will see separate tabs containing the participants assigned to their groups. Subgroups also appear in the roll-call area, making attendance easier to manage.

To create a subgroup:

1. Enter a **Title**, such as **Bus Number** or **Hotel Room**.
2. Enter the available options, separating each one with a comma.

For example - **Bus 1, Bus 2, Bus 3**



Remember, these are **CSV fields**, so ensure that each option is separated by a comma. If the subgroup requires a free-text answer rather than predefined options, enter a question mark (**?**) in the options field.

Tip – Include the subgroup name in each option. For example, use **Bus 1, Bus 2 and Bus 3** rather than simply **1, 2 and 3**. This will make the options clearer in dropdown menus and roll calls.

Parental Consent and Information Collection

Trips Assist can collect parental consent and any additional information required for the trip. The school can decide which information to request and can collect it at different stages of the trip-planning process.

Parental Consent Declaration

When creating a trip, several data items are available for schools to select to collect important information from the parents. The first field is the **Parental Request for the Trip** — default text is populated; however, this text can be customised depending on the type of consent required by the school.





Standard Information to Collect

Select the information that parents or carers must provide:

- **Mobile Phone Number** – Collects the current contact number for the student attending the trip.
- **Emergency Contact Details** – Collects details of the person who should be contacted in an emergency.
- **Medical Details** – Collects information about medical conditions and any medication required during the trip.
- **Allergy/Dietary Requirements** – Collects details of allergies, intolerances or special dietary requirements.
- **Doctor's Contact Details** – Collects the name, address and telephone number of the student's doctor.
- **GHIC (Global Health Insurance Card)** – Collects the student's GHIC details where these are required for an overseas trip.
- **Passport Details** – Collects the student's full name as shown on the passport, passport number and expiry date.

Note - Any information items selected by the school will become mandatory. Parents or carers must complete every selected field before they can submit the form. If a field does not apply to the student, they should enter **N/A** rather than leaving it blank.

Note – Information previously provided by a parent or carer will be pre-populated when the student is invited to a future trip. The parent or carer must review the information, make any necessary changes and submit it again to confirm that it is accurate and up to date for the new trip.

Staggering Information Collection

The school does not need to request all information at the same time. Data collection can be staggered throughout the planning of the trip.

For example, parental consent and emergency contact details could be requested initially. Passport, GHIC and medical information could then be requested once the student's place has been confirmed.

To collect further information, edit the trip and select the additional data items required. Parents or carers can then be emailed and asked to return to the trip to complete the newly requested information.

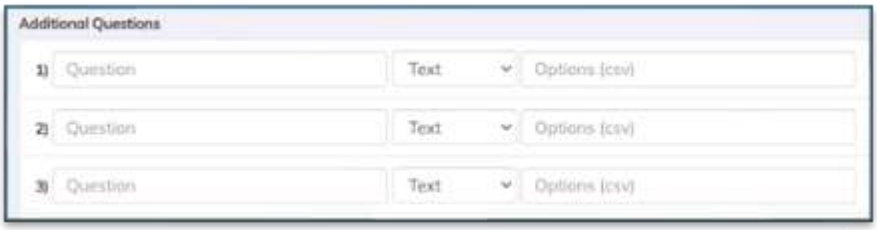
Note: - Only select information that is necessary for the trip. This is particularly important when collecting sensitive information such as medical, GHIC or passport details.

Trip-Specific Questions

When creating a trip, the school can add up to **five additional questions** for parents to answer. These questions can be used to collect information that is specifically required for the trip and is not already held by the school.

For example, for a skiing trip, the school may need to collect a student's:

- Shoe size for ski boots
- Height for ski equipment
- Clothing or glove size
- Skiing experience
- Equipment requirements



For each additional question:

1. Enter the **Question** that the parent will be asked.
2. Select the required **answer type**, such as free text or a list of options.
3. Where applicable, enter the available answers in the **Options** field, separated by commas.

Only add questions that are relevant to the trip. Parents will be asked to provide this information when responding to the trip invitation.

Additional Consent Requests

The **Additional Consent Requested** field can be used where separate consent is required for a particular activity or aspect of the trip.



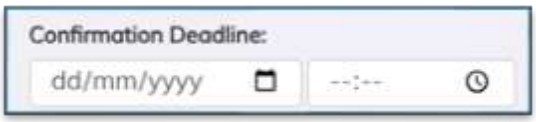


Enter each consent request as a separate option, using a comma to separate multiple requests. Examples could include consent for photographs, water-based activities or other activities requiring separate parental approval.

Deadlines, Capacity and Waiting Lists

Confirmation Deadline

Set the date by which parents or carers must confirm whether their child is interested in attending the trip. Once the deadline has passed, they will no longer be able to submit their response.



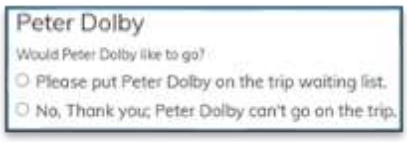
Trip Capacity

Enter the maximum number of places available for:

- Students
- Staff

These limits allow the school to control the number of participants who can join the trip.

Waiting List



A waiting list can be enabled where the number of students interested in the trip may exceed the available places. Once the trip is full, parents or carers will be offered the option of adding their child to the waiting list. The student's status will appear as **Waiting** in the **Students and Staff** tab, together with the date and time their response was submitted.

This allows the school to manage the waiting list in the order responses were received. Staff can use the available filter to display only students with a waiting-list status.



Information for Parents and Students

Trip Description

Use the **Description** field to provide the main information that parents and students need to know about the trip. The description will appear at the top of the trip invitation. It can be updated at any time. Whenever a parent or student opens the trip link, they will see the most recent version.

The text editor can be used to:

- Format the text.
- Add images and links.
- Insert mail merge tags to personalise the information.

Trip Documents

Documents relating to the trip can be uploaded and made available for parents and students to download. These may include:

- Trip itineraries
- Hotel or accommodation details
- Travel arrangements
- Venue information
- Kit or packing lists
- Other important trip information

Select **Choose Files**, locate the required documents and then select **Submit**. Multiple documents can be selected and uploaded at the same time.

⚠ **Important -** Uploaded documents will be visible to parents and students. Check that every document is accurate, up to date and does not contain confidential or unnecessary personal information before uploading it.

Saving and Approving the Trip

Once the required trip information has been entered, select **Submit** to save the trip. The trip will remain in **Draft** until it has been reviewed and approved by an authorised member of staff. While the trip remains in draft, the staff member who created it cannot add students or staff or send invitations. Staff assigned to the **Trips Security Group** can review the trip and add participants while it is in draft.

Once the trip has been approved, the trip organiser can add students and staff, send invitations and continue managing the trip. Further information can still be requested later by editing the trip, selecting the additional data or questions required and emailing parents or carers to ask them to update their response.

Managing the Trip

Once a trip or event has been approved, the organiser can add students and staff, send invitations, monitor the information received and organise participants into subgroups.

When a staff member creates a trip, they cannot add students or staff while it remains in **Draft**, unless they are assigned to the **Trips Security Group**.

Staff assigned to the **Trips Security Group** can review the trip and add participants before it is approved. Once the trip has been approved, the staff member organising it can also add the required students and staff.

Adding Participants

Students and staff are managed from the **Students and Staff** tab. Once added, they will appear in the participant table, where their invitation status, submitted information and subgroup allocations can be managed.

Adding Staff

To add staff members:

1. Navigate to the **Students and Staff** tab.
2. Select **Add Staff/Other**.
3. Select the required staff members. Multiple staff members can be selected at the same time.
4. Select **Submit** to confirm the selection.

Adding Students

Students can be added individually or by selecting a group. Trips Assist automatically retrieves the available student groups from the school's MIS.

- To add individual students, select **Add Students**, select the required students, then select **Submit**.
- To add a group of students, select **Add Groups**, select the required group or groups, then select **Submit**.

Once added, the selected staff and students will appear in the table. The school can then send invitation emails and assign each person to the appropriate trip group.

Sending Trip Invitations

Once the trip has been approved and the required students and staff have been added, invitation emails can be sent directly from the **Students and Staff** tab.

Emails can be sent to:

- Selected parents or carers.
- Selected students.
- Selected staff members.

These emails can be used to send the initial invitation, request parental consent, collect further information or provide an update about the trip.

Sending an Email

1. Select the checkbox next to each student or staff member who should receive the email.
2. Select **Selected**.
3. Choose the appropriate option:
   - **Send Email to Selected Parents**
   - **Send Email to Selected Students**
   - **Send Email to Selected Staff**
4. If emailing parents, select **Send to Priority 1 Parents Only** if the email should only be sent to each student's Priority 1 parent or carer.
5. Enter or check the **From Name** and **Reply To** address.
6. Check the email **Category** and **Email Subject**.
7. Enter or amend the email message. Use the available **Tokens**, **Student Tokens** and **Trip Tokens** to personalise the email and insert trip information automatically.
8. Select **Send** to send the email immediately, or **Schedule** to send it at a later date and time.

The email will include a link allowing the recipient to view the trip details, respond to the invitation, answer any additional questions and download the documents attached to the trip.

Viewing Staff/Student Information



As parents and staff complete the requested information — such as emergency contact details, medical conditions, or allergies — staff can view this data by selecting the student's or staff member's name from the **Students and Staff** tab.

Important - If the school requests a student's personal mobile number, it will only become visible on the day of the trip and can only be viewed by the **Trip Leader**.

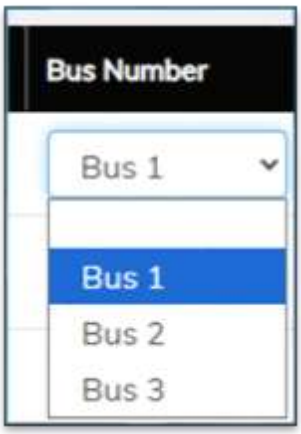
Understanding the icons

Icons will appear alongside each participant as the requested information is completed. These provide staff with a quick visual indication of the information held for that person.



Within the **Roll Call** tab, the most important indicators, including **Medical** and **Allergy** information, will also be displayed. This helps supervising staff identify students who may require additional support during the trip. The icons can also help organisers identify information that has not yet been completed before the trip takes place.

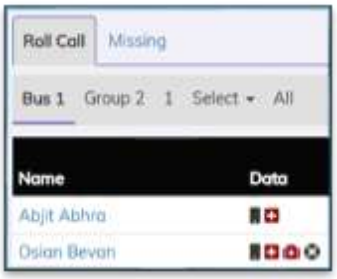
Allocating Multiple Participants to a Subgroup



Once subgroups have been created, students and staff can be assigned to the appropriate options. These could include:

- Bus or coach numbers.
- Teams or activity groups.
- Hotel rooms.

When staff open the trip, they can view the students and other staff assigned to their groups. This makes it easier to manage participants and complete roll calls.



Subgroup information can be added or amended at any time, including on the day of the trip. For example, hotel room numbers can be allocated once the final rooming arrangements are known.

To allocate an individual participant, navigate to the **Students and Staff** tab and select the appropriate option from the subgroup dropdown displayed against their name.

Allocating Multiple Participants to a Subgroup



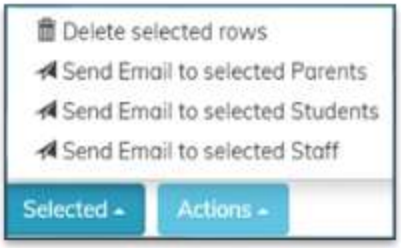
Several students or staff members can be allocated to the same subgroup at once. For example, to assign several students to **Bus 1**:

1. Navigate to the **Students and Staff** tab.
2. Select the required participants.
3. Select **Selected | Set Bus Number | Bus 1**.

All selected participants will be assigned to the chosen subgroup.

Removing a Student from a Trip

Students who have declined the invitation can be identified by filtering the table to show participants with a response of **No**.



To remove multiple participants:

1. Navigate to the **Students and Staff** tab.
2. Use the filter to display students with a response of **No**.
3. Select the students to be removed.
4. Select **Selected | Delete Selected Rows**.

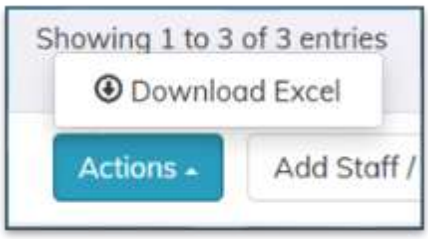
To remove an individual participant, select their row and then choose **Selected | Delete Selected Rows**. Once removed, the person will no longer be assigned to the trip or event.

Downloading Trip Information

Information collected from parents, students and staff can be downloaded to Excel. The spreadsheet provides a consolidated record of the participants and the information submitted for the trip.

This can be useful for:

- Checking that all required information has been completed.
- Reviewing medical, allergy and emergency contact information.
- Preparing group or team lists.
- Producing a working copy for authorised staff during the trip.
- Retaining an appropriate operational record where required by the school.



To download the information, navigate to the **Students and Staff** tab and select **Actions | Download Excel**.

⚠ **Important:** The downloaded spreadsheet may contain personal and sensitive information. It must be stored securely, made available only to authorised staff and disposed of in accordance with the school's data-protection and retention procedures.

Managing Attendance and Roll Calls



Watch Video – Managing a Trip in Progress

Trips Assist allows staff to create unlimited roll calls throughout a trip or event. Roll calls could be taken:

- Before leaving the school.
- When boarding or leaving transport.
- On arrival at a venue.
- Before and after an activity.
- When moving between locations.
- Before beginning the return journey.
- On returning to the school.

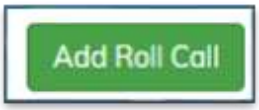
Staff assigned to subgroups can complete roll calls for the students and staff they are supervising, making it easier to manage attendance across different buses, teams, activity groups or locations.

Testing Roll Calls Before the Trip

Roll calls can be created before the trip begins for testing and staff-training purposes. This allows staff to become familiar with the process before they need to use it during the trip. Test roll calls can be deleted before the official trip start date and time.

Once the trip has started, any new roll calls form part of the trip's safeguarding and audit record and cannot be deleted.

Creating a Roll Call



To create a roll call:

1. Navigate to the **Roll Call** tab.
2. Select **Add Roll Call**.
3. Enter a clear name that identifies the purpose or location of the attendance check, such as:
    - Leaving School
    - Arrived at Venue
    - Bus 1
    - After Lunch
    - Leaving Hotel
    - Returned to School

Once created, the roll call will remain editable for **30 minutes**. This gives staff time to complete and check the attendance information before the roll call closes.

⚠ **Note -** Use a clear and specific name for every roll call. This will make the attendance history easier to understand if it needs to be reviewed later.

Completing a Roll Call

Staff can access the trip portal using the secure link sent to them by email. From the portal, they can open the **Roll Call** tab and select the group for which they are responsible. Each student and staff member can be marked as:

- **Present**
- **Absent**

If somebody is marked as **Absent**, a reason must be entered. The person will then appear in the **Missing** tab so that their status can be monitored.

Allocating staff and students to appropriate subgroups before the trip makes this process easier. For example:

- A member of staff travelling on a bus can complete the roll call for the students assigned to that bus.
- A team leader can complete the register for their sporting team.
- A supervising member of staff can complete a roll call for their activity or visit group.
- Staff at different locations can manage their own groups independently.



Managing a Missing Student

When a student is marked as **Absent**, they will appear in the **Missing** tab and remain there until they are recorded as found. The **Missing** tab can be viewed by authorised staff accompanying the trip and by authorised staff logged into SchoolWorkSpace at the school. This allows everyone involved in managing the incident to remain informed.

Staff can add notes as the search progresses, creating a time-stamped record of:

- The actions taken.
- Locations checked.
- Attempts to contact the student.
- Information received from other staff or students.
- Any escalation or external assistance requested.
- The staff member entering each update.





Once the student has been located, select **Found** to update their status. This update can be recorded even if the original roll call has closed. The student's original absence, subsequent updates and the time they were recorded as found will remain available as part of the trip's audit record.

Safeguarding - Trips Assist provides a record of the incident and the actions taken. Staff must continue to follow the school's missing-student, safeguarding and emergency procedures and should not delay escalation while updating the system.

Viewing a Student's Roll-Call History

The complete roll-call history for an individual student can be viewed from the **Roll Call** tab. Select the student and then choose **Roll Call**. The system will display the attendance information recorded for that student across the trip's roll calls.



This can help staff:

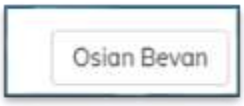
- Check where the student was last recorded as present.
- Review previous absences and reasons.
- Confirm which attendance checks have been completed.
- Review the sequence of events if an incident occurs.

Viewing Roll-Call Statistics



Attendance statistics can be viewed while a roll call is being completed or after it has closed. Navigate to the **Roll Call** tab and select the heading of the required roll-call column. The statistics will show the attendance position for that roll call, allowing staff to check whether all participants have been accounted for.

Accessing Additional Student Information



There is an important difference between accessing the trip through the emailed staff link and accessing it while fully logged into **SchoolWorkSpace**.

The emailed link allows staff to use the trip portal and complete roll calls for their allocated groups. Authorised staff who are logged into SchoolWorkSpace can access additional student information held within the system, including contact details for parents or carers recorded as having **Parental Responsibility**.

To access this information:

1. Log into **SchoolWorkSpace**.
2. Open the **Trips Assist** module.
3. Select the appropriate trip or event.
4. Open the **Roll Call** or **Missing** tab.
5. Select the required student.
6. Select the button displaying the student's name to open their SchoolWorkSpace record.

Access to this information is particularly useful when staff need to contact a parent or carer or review important student information during an incident.

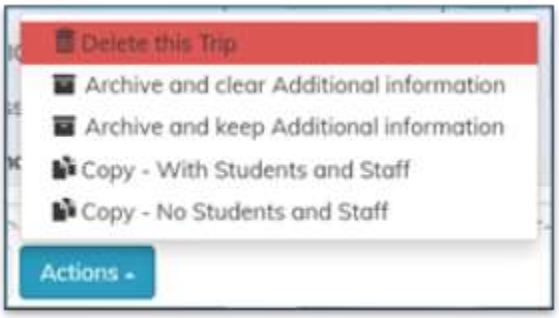
Archiving, Copying or Deleting a Trip

Once a trip or event has ended, it can be moved to the archive. The school can choose whether to retain the additional information collected from participants or clear it when the trip is archived.

Archiving a Trip

Once a trip has ended, it can be moved to the archive. The school can choose whether to clear or retain the additional personal information collected for the trip.
This may include:

- Personal mobile numbers
- Emergency contact information
- Medical and medication details
- Allergy and dietary requirements
- Doctor's contact details
- Passport and GHIC details
- Answers to additional questions



Trips Assist does not automatically retrieve this information from the school's MIS. Instead, parents or carers are asked to provide current information for each trip, helping to ensure that staff have the most up-to-date details.

To archive a trip, navigate to the **Details** tab, select **Actions**, then choose one of the following options:

- **Archive and clear Additional information** – Archives the trip and clears the additional personal information collected from participants.
- **Archive and keep Additional information** – Archives the trip but retains the additional information collected from participants.

⚠ **Important -** The school should follow its own data-protection and retention policies when deciding whether to keep or clear additional information.

Copying a Trip

A trip or event can be copied from either the current trip list or the archive. This makes it quicker to create a similar trip, recurring event or sporting fixture.

Open the trip to be copied, navigate to the **Details** tab, select **Actions**, then choose one of the following options:

- **Copy – With Students and Staff** – Copies the trip details together with its existing participant list. This is useful where the same students and staff will take part in another trip or event, such as a school team attending a series of sporting fixtures.
- **Copy – No Students and Staff** – Copies the trip configuration without its participants. This is useful where the same arrangements are required but a different group of students or staff will be attending.

Once copied, the new trip can be amended as required. Check the trip name, location, dates, times, confirmation deadline, capacity, description, consent requirements, questions and uploaded documents before sending invitations.

⚠ **Note -** Copying a trip reduces the amount of information that needs to be entered again. However, all copied information should be reviewed to ensure that it remains appropriate and accurate for the new trip or event.

Deleting a Trip

A trip can be deleted if it was created in error or is no longer required. To delete a trip, navigate to the **Details** tab, select **Actions**, then choose **Delete this Trip**.

⚠ **Important -** Deleting a trip is different from archiving it. If the trip has taken place and needs to remain available as part of the school's records, it should be archived rather than deleted.

Appendix A - SchoolWorkSpace Administration

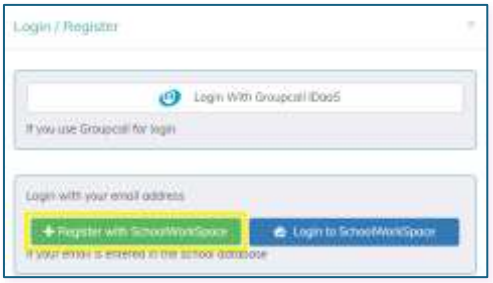
The following sections provide supporting guidance for SchoolWorkSpace administrators. They cover general administration tasks that may be required when setting up access to Trips Assist, including creating users, configuring login options and managing multi-factor authentication. These tasks do not form part of the day-to-day management of trips and events, so most staff will not need to refer to this appendix.

How to Log into SchoolWorkSpace

Once the data sharing has been approved, Centre Staff can log in to Exams Assist.

First-Time Registration

1. Go to schoolworkspace.co.uk.
2. Select **Login / Register** on the homepage.
3. Select **Register with SchoolWorkSpace**.
4. Enter the email address recorded in your school's **Management Information System (MIS)**. A **6-digit verification code** will be emailed to you.
5. Enter the verification code, then create and confirm your password.



After logging in, you will be directed to your SchoolWorkSpace homepage.

Logging In Again

Go to schoolworkspace.co.uk, select **Login / Register**, then log in using your registered email address and password.

Creating a New User



If a staff member does not appear in the list, you can create a new user in SWS by navigating to **School Settings | Staff Roles | Add User**. Once selected, fill in the required information, and the user will be added. If an email address is provided, the staff member will be able to log into the system.

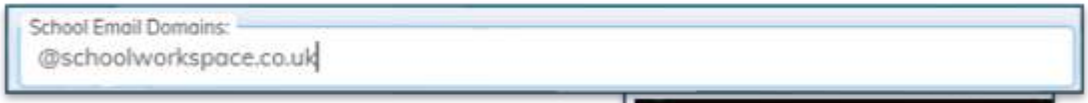
Log-in Options

Schools have several options for how staff members can log into SchoolWorkSpace. To select the most appropriate options for your school, navigate to **School Settings | Staff Roles | Staff Login Settings**.

Password Policy - The password policy has been increased, so staff members will need to use a strong password (At least 8 characters, one lowercase, one uppercase, one number, and one special char (!*@#$ %~^&+=,.`), and not include (<>).

Staff Can only Log in with a school email address

If selected, school staff will only be able to log in to SchoolWorkSpace by using the school's Official Domain Email Address. Once enabled, the school will need to ensure they have entered the official domain address. If the school uses multiple email domains, such as .co.uk and .com, enter each domain separated by a comma.



Staff Can Log in with any email

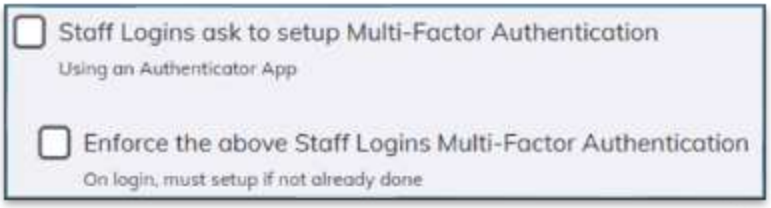


If selected, School Staff will be able to log in to SchoolWorkSpace by using any email address stored in the software. It is possible to store several email addresses in the system; each tagged to a different type. The different types are – Home, Work, Other or Alternative Login Email.

If this option is not selected, School Staff will only be able to log in to SchoolWorkSpace using the email address tagged as Work.

Staff Logins Require Multi-Factor Authentication (MFA)

Multi-Factor Authentication. This will mean that when a Staff Member logs in to SchoolWorkSpace, after entering their password, they will need to obtain the 6-digit code from the Authenticator App, then enter this into SchoolWorkSpace when prompted.



There are two options available to schools:

1. **Staff Logins Ask to setup Multi-Factor Authentication** – When a Staff Member logs in to SchoolWorkSpace, a banner will appear at the top of the homepage asking the user to setup Multi-Factor Authentication. This is not mandatory for the user to complete this task.



Note - To check whether staff have completed the multi-factor authentication setup, navigate to **School Settings | Staff Roles**. A QR icon in the **2Factor** column indicates that the user has completed the process.

2. **Enforce the above Staff logins Multi-Factor Authentication** – If selected, the Staff Members during the log in process will be instantly directed to setup the Multi-Factor Authentication app, they will not have the option. They will not be able to access SchoolWorkSpace until this process is completed.

Setting up Multi-Factor Authentication (MFA)

See below for the steps that the staff will need to follow to successfully setup the MFA:

Step 1 – Download the **Microsoft Authenticator App** from the **App** or **Google Play Store**.
Step 2 – Log into SchoolWorkSpace and Navigate to the main menu and select **Setup Multi-Factor Authenticator.**

Step 3 – Scan the QR Code into the Authenticator App, it will then add your account details into the authenticator app. Then select **add this Multi-Factor Authentication to my Account.** You will then need to provide the 6-digit code to link the authenticator with your user, once verified the setup process is complete.
Step 4 – You will be asked to provide a 6-digit code from the Authenticator App to log into SchoolWorkSpace.

Multi-Factor Authentication Recovery

If a staff member loses access to the authenticator app, the School admin can email a recovery code via **School Settings | Staff Roles**. Locate the staff member, click the **QR icon**, and select **Email Multi-Factor Reset Code.** The recovery code will be sent to their registered email. Once entered, the staff member can regain access and reconfigure MFA.



Require Staff to Login Daily

If selected, the staff member will be forced to log into SchoolWorkSpace daily. If the staff member is already logged in, the system will automatically log them out.

Enable MyLogin

This is a login product provided by Wonde, if your School uses Wonde to log in, then enable this function.

Whitelisting an IP Address

To allow staff to access SchoolWorkSpace without MFA from a secure location (e.g., the School), whitelist the IP address. Navigate to **School Settings | Settings** and work with your IT department to add the IP address of the trusted location.