

User Management

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Registering a New User

User Registration allows OPS-COM administrators to manually create new user accounts, granting access to the User Portal. This process enables individuals to utilize features such as purchasing parking permits, renting lockers, and managing violations, ensuring a comprehensive record for each system user.

Setup & Configuration

There are a number of permissions you can enable that will allow you to have the full compliment of User Management controls. Everyone, does not need this level of access. It makes sense to restrict this to the Primary Admins. The permissions come standard to the Primary Admin role when OPS-COM is first installed.

Admins who are setting up Users as part of their daily role, will need the **View Users** and the **Edit Users** permission found on the **User Management** tab.

1. Hover over **System Configuration, Admin Management**, and click **Manage Roles**.
2. Click Permissions on the role you want to grant this to.
3. On the **User Management** tab, enable the **Edit Users** checkbox.
4. Enable the **View Users** checkbox.
5. Click **Save Permissions**.

Using this Feature

The user registration process involves two main stages: initial basic information entry and then full profile completion.

1. Hover over **User Management**, and click **User Registration**.

Basic User Information

1. Fill out the initial standard information on the **User Registration Form**:

- Select the appropriate [User Type](#) for the new user.
 - Enter a **Username** and the required basic user information (e.g., first name, last name, email).
2. Click **Submit Registration** to proceed to the next stage of profile setup.

Completing and Activating the User Profile

1. On the **Edit User Profile** page, ensure the checkbox for **Allow user login and mark account as active** is enabled.

- This setting activates the user's ability to self-manage their account via the **User Portal** and will prompt them to change their password upon their first login.

2. Complete all remaining profile information, ensuring all [mandatory fields](#) are filled. Refer to the linked wiki articles for each mentioned field below.

- [Locker User Type](#)
- [Tax Exemption Code](#)
- [Company Member/Individual](#)
 - Account number
 - Receives Invoice checkbox
- [Department Name](#)

3. Click **Submit Profile Information**. The **Confirm Registration Information** screen will appear. Carefully verify that all information displayed is correct.

- If any edits are needed, click **Back** to return to the previous page.
- When ready to proceed, click **Information Correct**.

Fields marked with a red exclamation mark (!)* after a failed submission are mandatory fields that must be completed. Administrators with proper permissions can adjust which fields are mandatory.

Registration Completion

- You will be directed back to the **Edit User Profile** screen, where a pop-up will confirm that the user profile was successfully updated.
 - The registration process is now complete. [Refer to this wiki article](#) to see what you can do now that you have a User Profile entered.
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Best Practices & Considerations

- **Mandatory Field Management:** Understand that administrators with appropriate permissions can adjust which fields are mandatory for user profiles via **System Settings > User Profile**. Review these settings to ensure all necessary data is collected during registration.
- **Password Prompt:** Inform new users that they will be prompted to change their password upon their first login to the User Portal.
- **User Type Selection:** Accurately select the **User Type** during registration, as this impacts the user's access to lots, payment types, and profile field visibility.
- **Post-Registration Actions:** After registration, the system allows immediate actions like adding a vehicle or purchasing a permit. Guide the user or perform these actions as per your organizational workflow.
- **Email Verification (If Configured):** If your system is configured to require email verification for new accounts (a setting outside of this specific registration process), ensure the user knows to check their email for the verification link before they can fully log in, even if you manually registered them.

User Search

User Search provides administrators with a powerful tool to quickly locate and access specific user accounts within the system. This feature enables efficient viewing and editing of user information, supporting various administrative tasks such as profile updates, violation management, and permit assignment.

Using this Feature

The **User Search** screen allows you to input various criteria to find specific users and refine your search results.

1. Hover over **User Management**, and click **User Search**.

Entering Search Criteria

1. Click the Toggle More Options button to see all available fields on the **User Search** screen.
2. Refine your search results by selecting one of the following radio button options:
 - **Any Users**: Displays both enabled and disabled user accounts.
 - **Enabled Only**: Displays only active user accounts.
 - **Disabled Only**: Displays only disabled user accounts.
3. Enter your parameters and click the **Search** button.
4. The search results will appear in a table below the criteria box.

There is a limit to how many records will return. If you see the message "The search has returned more records than allowed and has been truncated. Please refine your search." You will need to narrow down your criteria.

Available Actions from Search Results

From the search results table, you can typically perform various actions by clicking on the user's name or associated icons, such as:

- Click on any **column header** to resort the results alphabetically.
- Click the **Username** button to access the [User Profile Landing Page](#).
- Click the **Envelope** icon to start an [email](#) to that user.
- Click the **Clock** icon to shortcut to the [user history](#).

- Although no export button is available, it is possible to copy the search results directly into Excel or Google Sheets.
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Best Practices & Considerations

- **Combine Criteria:** For more precise results, especially in systems with many users, combine multiple search criteria (e.g., first name and last name, or username and User Type).
- **Utilize "Toggle More Options":** Don't hesitate to use the expanded search options when you need to find users based on less common data points.
- **Disabled Accounts:** Remember to select "Any Users" or "Disabled Only" if you are looking for accounts that may have been deactivated.
- **Data Integrity:** Accurate and up-to-date user information in the system will yield more reliable search results.
- **Quick Access:** Use the User Search as your primary tool for quickly navigating to a user's comprehensive profile for any administrative task.

User Profile Overview

The **User Profile Landing Page** in OPS-COM serves as an administrator's central dashboard for a user's comprehensive information and current activity. This page offers a quick reference view, enabling efficient access and management of user details, associated vehicles, violations, permits, and other crucial historical data.

Using this Feature

1. To navigate quickly to a user's profile, you can use the [Quick Search](#) function or hover over [User Management](#), and click **User Search**.
2. Locate and select a user, and the **User Profile Overview** page will be displayed. This page provides various sections and actions for managing user data and viewing their history.

Editing a User's Basic Profile

1. Click the **Edit** button on the **Basic Profile Information** section.
2. The full user profile editing form will display, allowing you to update various account details.
 - The **Edit User Profile** form is structured into three main categories: **Personal Information**, **Student Information**, and **Staff/Faculty Information**. Each category contains various fields that can be individually set to **Hidden**, **Visible**, or **Required** ([as defined in your System Settings for User Profiles](#)).

Logging in as a User

This feature allows administrators to view the system from an end-user's perspective.

1. Click the **Login as user** button.
2. A new browser window will open, automatically logging you into the OPS-COM end-user portal as the selected user, with all their associated functionalities.

You may encounter an error if the Auto Login setting is not configured correctly in System Settings. If this occurs, please contact [OPS-COM Support](#) for assistance.

Viewing a User's Waitlist Position

If the user is on any waitlists, you will see the lots and their ranks listed in this section.

Adding or Editing Vehicles

1. In the **Vehicles** section, click **Edit**.
2. You will be directed to the [Vehicle Information screen](#), where you can:
 - **Add new vehicles** to the user's profile.
 - **Edit or remove** existing associated vehicles.
 - **Apply a DNTT (Do Not Ticket Tag)** to a specific vehicle.

Viewing Additional Information

The User Profile Landing Page provides immediate access to a wealth of additional user-specific data:

1. The dashboard sections offer direct access to information regarding **Alarms, Deposits, Violations, User Notes, and Permit details**.
 2. Any active alerts or warnings associated with the user's profile will be prominently displayed at the **top of the page**.
 3. Active Deposits on the user account will be displayed if any exist.
 4. Private user notes will be displayed and you can also add additional notes here.
 5. **For Violations:**
 - View detailed violation information by clicking the **ticket number** within the **Violations** section.
 - If available, view photos related to a violation by clicking the **camera icon** next to the ticket number.
 6. **For Permits:**
 - Access detailed permit information by clicking the **permit number** in the **Active Permits** section.
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Best Practices & Considerations

- **Centralized Management:** Utilize the User Profile Landing Page as your primary hub for managing all aspects of a user's interaction with the OPS-COM system.
- **Efficient Troubleshooting:** When a user reports an issue, navigating to their profile landing page allows for a quick overview of their status, active permits, and recent violations, which can greatly aid in troubleshooting.
- **Testing User Experience:** The "Login as user" feature is invaluable for testing new configurations, verifying user access, or replicating user-reported issues directly from their perspective.
- **Comprehensive History:** Leverage the integrated views of alarms, violations, and permit details to understand a user's complete history within the system, informing decisions related to appeals, permit renewals, or enforcement actions.

Archiving or Disabling a User

Archiving or Disabling a User Account in OPS-COM allows administrators to deactivate user access while preserving their historical data. This process is crucial for managing user access permissions, maintaining data integrity for past transactions and activities, and ensuring compliance when a user's role changes or they leave the organization.

Using this Feature

The process of archiving or disabling a user account begins by accessing their individual profile through the [User Profile Landing Page](#).

1. Locate the user you wish to edit/update by [searching](#).
2. Click on the **Username** from the search results, and their **User Profile Landing Page** will display.
3. Confirm that the name of the user displayed at the top right-hand corner of the page matches the user whose account you intend to modify.

You can choose to either temporarily disable a user's login access or perform a more formal archive, often linking to an **Archive User Type**.

Disabling a User Account (Preventing Login)

This method revokes a user's ability to log into their OPS-COM account while keeping their profile and data fully intact for administrative reference.

1. Click the **Edit** button on the **Basic Profile Information** bar, or click the **Profile** dropdown menu and select **Edit Profile Information**.
2. The **Edit User Profile** screen will be displayed.
3. Locate and **disable** the **Allow user to login and mark account as active** checkbox.
4. Click the **Submit Registration Information for Processing** button at the bottom of the page.
5. On the **Confirm Registration Information** screen, click the **Information Correct** button to submit the change. The user's account will now be disabled.

Archiving a User Account (Categorized Disablement)

Archiving provides a structured way to disable a user account by assigning it to a specific "Archive Type," which can be useful for reporting or internal tracking.

1. Follow the steps 1 -3 above.
 2. On the **Archive Type** dropdown list, choose an appropriate **Archive User Type** from this dropdown list (e.g., "Former Student," "Terminated Staff," "Account Closed"). You must have created [user types](#) for this purpose if you want to see them in the drop down list.
 3. Click the **Archive User** button.
 4. Click **OK** on the confirmation pop-up to finalize the archiving process.
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Best Practices & Considerations

- **Data Integrity:** Disabling or archiving an account is the best practice instead of attempting to delete a user. User accounts often have associated historical data (permits, violations, payments, login history), and direct deletion would compromise data integrity and historical reporting.
- **Permissions:** Remember that a disabled or archived user account retains its assigned roles and permissions for reporting purposes, even though the user can no longer act on them.
- **Reversibility:** Disabling an account is typically reversible. You can reactivate an account by re-checking the **Allow user to login and mark account as active** checkbox in their profile.
- **Archive Types:** Utilize different "Archive User Types" to categorize why an account was disabled (e.g., account closed, left organization, temporary suspension). This can be valuable for internal auditing and future reference.
- **Communication:** Ensure clear internal communication within your organization regarding the process for disabling/archiving user accounts and the reasons behind it.
- **Security:** Disabling accounts promptly when a user's access is no longer required is a critical security measure to prevent unauthorized access.

Using Tax Exemption

OPS-COM supports **Tax Exemption Codes** for users, allowing the system to automatically waive applicable taxes during their purchases of items like permits, violations, and lockers. This feature ensures accurate billing for tax-exempt individuals or organizations and simplifies compliance with specific tax regulations.

Using this Feature

1. Locate the user you wish to edit/update by [searching](#).
2. Click on the **Username** from the search results, and their [User Profile Landing Page](#) will display.
3. Confirm that the name of the user displayed at the top right-hand corner of the page matches the user whose account you intend to modify.
4. Click the **Edit** button on the **Basic Profile Information** bar, or click the **Profile** dropdown menu and select **Edit Profile Information**.

Adding or Updating a Tax Exemption Code

1. On the **Edit User Profile** screen, locate the **Tax Exemption Code** field.
2. Enter or update the alphanumeric tax exemption code in this field.
3. Click **Submit Profile Information**.
4. On the subsequent confirmation screen, click **Information Correct** to save the changes to the user's profile.

Verifying the Tax Exemption Code

The **Tax Exemption Code** is displayed in the **Profile Overview** window on the user's profile landing page for easy reference, allowing administrators to quickly verify its presence.

Tax-Free Transactions

When a user with a valid tax exemption code on their profile proceeds to purchase items (such as a permit), applicable taxes will **not** appear as a line item on the payment or confirmation page. The system automatically waives these taxes.

Generating the Tax Exemption Report

Administrators can generate a report to view all users with active tax exemption codes.

1. Generate the **Tax Exemption Report** from the **Payments** menu.
 2. This report includes three key fields: **First Name**, **Last Name**, and **Tax Exemption Code**.
 3. You can print or export the report records for further use, such as auditing or external reporting.
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Best Practices & Considerations

- **Accuracy is Crucial:** Ensure that tax exemption codes are accurately entered and validated against official documentation to maintain compliance and prevent incorrect billing.
- **Internal Verification:** Establish clear internal procedures for verifying a user's eligibility for tax exemption before entering a code on their profile.
- **Compliance:** Understand your organization's tax compliance requirements and how this feature integrates with your overall financial processes.
- **Reporting and Auditing:** Regularly run and review the **Tax Exemption Report** for auditing purposes, ensuring that all tax-exempt transactions are correctly accounted for and supported.
- **User Communication:** Clearly communicate tax exemption policies to eligible users.

Retrieving Uploaded Files

This article provides instructions for OPS-COM administrators on how to manage files uploaded by users. It covers the process of locating, viewing, and deleting user-submitted files from within the administrative portal.

Setup & Configuration

File management is a standard feature and requires no special setup. However, it is important to understand the roles for uploading and managing files:

- Admin Side: Administrators can only view and delete files from the admin portal. They cannot upload files on behalf of a user from this interface.
- User Side: Only users can upload files to their own profiles.

Using this Feature

Quick Search... Client Time: Feb 25, 2020 @ 11:21:59

Name Mrs. Michael Rue Ashbury

Email Address mash-bury@tomahawk.ca

Auto Login Address [Login as user](#) ?

Active Address

Address	5612 Belleline Rd
City	Ottawa
Province	Ontario
Postal Code	K2G5B1

Faculty Information

Employee ID	00800147
Department Name	Security

Uploaded Files [Manage](#)

5__1582647520__88bf37a3-ae13-41c7-8594-1836ff7b0359....	2020-02-25
5__1582647505__ddaab9c1-517b-4050-9a80-1d8a541aa4fb...	2020-02-25
5__1582646981__7ae12534-5ae8-404c-bd17-0fb18c03e28e...	2020-02-25
5__1582646404__f2adbf2-d2b0-49dc-a29c-167ec51509bc...	2020-02-25

Violations

Ticket	Issued	Value	Notes
TT-10018	Feb. 20, 2020	50.00	

Active Lockers

Locker	Active Window	Building / Area	Amount
4	Y : Test Annual	Arena: Men's Locker Room	\$113.00
22	Y : Test Annual	Arena: Men's Locker Room	\$113.00
11	Y : Test Annual	Arena: Men's Locker Room	\$113.00
5	Y : Test Annual	Arena: Men's Locker Room	\$113.00

Active Permits

Permit	Active Window	Lot Name	Amount
0005	Y : Test Annual	Red Staff Lot West	\$395.50
0002	Y : Test Annual	Red Staff Lot West	\$395.50
50	Y : Test Annual	After 4PM	\$169.50
B201	M : Test Sales Window	Blue Lizard Lot 2	\$28.25

User Notes ?

Tomahawk → May 18, 2018 @ 1:40 pm

05/18 Tester Notes - No Subscription, Monthly 1805 Sub allocation, Permit #500 is represented by Cash

All file management tasks for a specific user begin from their profile page in the admin portal.

Viewing Uploaded Files

1. Navigate to the target user's profile.
 2. Scroll down to the Uploaded Files section on the user's dashboard.
- This section displays a preview of the five most recently uploaded files.
 - To view a specific file, click on the hyperlinked file name.
 - To view all uploaded files for the user, click the Manage button. This will take you to the user's main Uploaded Files page.

Deleting an Uploaded File

1. From the user's profile, click the Manage button in the Uploaded Files section to access the full list of files.
2. On the Uploaded Files page, locate the file you wish to remove.
3. Click the Delete button associated with that file.
4. Confirm the action in the subsequent prompt to finalize the deletion.

Best Practices & Considerations

- **Uploading Files for a User:** Administrators cannot directly upload files to a user's profile. To upload a file on behalf of a user, you must use the Login as User feature and follow the user-side workflow. Instructions can be found in the Uploading Files from the User-side article.

File Deletion is **Permanent**: Once a file is deleted, it *cannot* be recovered. Always verify you are deleting the correct file before confirming the action.

Registering a Locker for a User

The **Lockers** tab on the **User Landing Page** allows administrators to rent lockers to users. Users can also self-manage their locker purchases by logging into the User Portal.

Before a locker can be registered for a user, the locker inventory must be configured in OPS-COM. This includes setting up **Buildings**, locker room locations (e.g., **Men's Locker Room**), individual locker numbers, and any associated fees.

This article details the process for OPS-COM administrators to register a locker for a user through the administrative portal. The guide covers all steps from locating the user's profile to selecting a locker, confirming the reservation, and processing payment. The entire locker registration process is handled within the user's profile.

Locker Registration Process

1. **Locate the User:** Begin by searching for the user you wish to register a locker for. From the search results, click their **Username** to navigate to their **Profile Landing Page**.
2. **Access Locker System:** In the user's profile, click the **Lockers** button to open the locker registration interface for that specific user.
3. **Select a Building:** On the **Locker Registration** page, select the appropriate building from the list under the **Available Buildings** heading.
4. **Choose a Location:** The screen will refresh to the **Locker Registration - Locker Selection** page. Click the drop-down menu to choose the specific locker location (e.g., **Men's Locker Room**).
5. **Reserve a Locker:** A list of available lockers will be displayed. Select the desired locker number from the list.
6. Click the **Reserve This Locker** button to proceed.
7. **Confirm the Reservation:** The **Confirm Locker Reservation** screen will appear, summarizing the details. Carefully verify the information and click the **Confirm Information** button.

8. **Process Payment:** You will be directed to the **Payments Due** screen. To finalize the registration, click the **Proceed to Payment** button and complete the transaction as required.

Best Practices & Considerations

- **Payment Finalizes Reservation:** In most configurations, a locker reservation is not considered final until payment has been successfully processed. If you navigate away from the **Payments Due** screen without completing the transaction, the locker may be released back into the available inventory.

Verify the Active User: Before selecting a locker, always double-check that the correct user's name is displayed in the top-right corner of the **Locker Registration** screen. This ensures you are assigning the locker to the correct profile.

User - Vehicles Tab

The **Vehicles tab** on the **Edit User Profile screen** allows administrators to add, edit and remove vehicles associated to user. This is also where administrators would add/remove **DNTT** (Do Not Ticket or Tow) information to a vehicle.

Managing User Vehicles

This article provides instructions for OPS-COM administrators on how to manage vehicles associated with a user's profile. It covers the complete lifecycle of vehicle management, including adding, editing, activating or deactivating, and removing vehicles, as well as managing Do Not Ticket or Tow (DNTT) statuses.

Using this Feature

All vehicle management tasks are performed from within a specific user's profile.

Navigating to the Vehicle Information Page

1. Hover over **User Management** in the main menu and click **User Search**.
2. Use the search fields (e.g., **name**, **username**, **email**, or **account number**) to find the desired user.
3. From the search results, click the user's **Username** to open their **Profile Page**.
4. Click the **Vehicles** tab to access the **Vehicle Information page**, which lists all vehicles associated with that user.

Adding a New Vehicle

1. On the **Vehicle Information page**, click the **Add New Vehicle** button.
2. On the **Add New Vehicle Information** screen, fill in all required vehicle details.
3. Click the **Add New Vehicle** button at the bottom of the form to save.

Editing a Vehicle

1. In the vehicle list, click the hyperlinked license **Plate** of the vehicle you wish to edit.
2. In the **Vehicle Information** window that appears, modify the necessary details.
3. Click the **Update Vehicle** button to save your changes.

Activating or Deactivating a Vehicle

1. In the vehicle list, locate the **Status** column for the desired vehicle.
2. The current status will be shown as a link (either **Active** or **Inactive**). Click this link to toggle the vehicle's status.

Removing a Vehicle from a User Profile

1. In the vehicle list on the user's profile, click the **X** icon in the row of the vehicle you want to remove.
2. Confirm the action in the subsequent prompt to finalize the removal.

Managing Do Not Ticket or Tow (DN TT) Status

1. In the vehicle list, click the **Record DN TT Link**.
2. This interface allows you to add, edit, or remove a **Do Not Ticket or Tow (DN TT)** notation. This status can prevent violation issuance under specific, pre-defined conditions (e.g., in a certain lot or during a specific time).

Best Practices & Considerations

- If you add a new vehicle but the details do not save correctly, it is likely because that license plate already exists in the system (associated with another user or archived). The vehicle must be properly associated with the current user before all details can be edited.
- Removing a vehicle only disassociates it from the current user's profile; it does **not** delete the vehicle record from the system. If the vehicle is associated with only one user, it will be archived. If it is associated with multiple users, it will remain active on the other

user profiles.

Clear Balances Before Removal: Before removing a vehicle that is only associated with one user, ensure any outstanding balances or violations tied to that vehicle are cleared.

Edit Primary Driver

This article explains the process for OPS-COM administrators to set or change the **Primary Driver** for a vehicle. The **Primary Driver** designation is used to identify the main user responsible for a vehicle, ensuring they receive all official communications like violation notices. This guide is essential when a vehicle is associated with multiple user profiles.

Setup & Configuration

The option to change the **Primary Driver** is only available when a single vehicle is associated with two or more user profiles. If a vehicle is only linked to one user, that user is automatically designated as the **Primary Driver**, and the selection field will not be visible.

The **Primary Driver** designation is managed from the vehicle editing screen within any associated user's profile.

How to Change the Primary Driver

1. **Navigate to the User's Profile:** Hover over **User Management** and click **User Search**. Find any user associated with the vehicle and click on their **Username** to open their **Profile Page**.
2. **Access Vehicle Information:** Click the **Vehicles** tab.
3. **Open Edit Vehicle Screen:** In the list of vehicles, locate the desired vehicle and click the hyperlinked license **Plate**. This will open the **Edit Vehicle** screen.
4. **Select the New Primary Driver:** Locate the **Primary Driver** drop-down menu. The list will contain all users associated with the vehicle.
5. Click the menu and select the name of the user you want to designate as the new **Primary Driver**.
6. **Save the Changes:** Click the **Update Vehicle** button to apply the change. The system will now recognize the selected user as the vehicle's primary point of contact.

Best Practices & Considerations

- **The Role of the Primary Driver:** A nightly system process automatically attempts to assign a **Primary Driver** to any new vehicle. Furthermore, if a violation appeal is submitted for a vehicle that lacks a designated **Primary Driver**, the system will automatically assign the role to the user who submitted the appeal. This ensures there is always a designated contact for communications.
- **Correcting Legacy Records:** If you encounter an older vehicle record with multiple users designated as **Primary Driver**, simply follow the steps above to select the correct one. When you save the change, the system will automatically remove the incorrect legacy designations from the other associated users.

Unlink a Vehicle from User Profile

This article provides instructions for OPS-COM administrators on how to remove the association between a vehicle and a user profile. This process is necessary when a user no longer owns a vehicle, or to correct a vehicle that was mistakenly linked to the wrong user account.

The process to disassociate a vehicle is performed from the user's profile page.

How to Remove a Vehicle from a User

1. **Navigate to User Search:** Hover over the **User Management** tab and click **User Search**.
2. **Locate the User:** Use the available search fields (e.g., **name**, **username**, **email**, or **account number**) to find the correct user profile.
3. **Open the User Profile:** Click on the user's **Username** in the search results to open their **Profile Page**.
4. **Access the Vehicle List:** Click on the **Vehicles** tab. The page will refresh to display all vehicles currently linked to that user.
5. **Initiate Removal:** In the vehicle list, locate the vehicle you wish to remove and click the red **X** icon located in that vehicle's row.
6. **Confirm the Removal:** A confirmation prompt will appear. Click **OK** to permanently remove the vehicle's association from the user's profile. To abort the action, click **Cancel**.

Best Practices & Considerations

Understanding Vehicle Removal: Removing a vehicle only disassociates it from the current user's profile; it does **not** delete the vehicle record from the system itself. If the vehicle is

associated with only one user, its record will be archived. If it is associated with multiple users, it will simply be removed from the current profile while remaining active on the other associated user profiles.

Clear Outstanding Balances First: Before removing a vehicle that is only associated with a single user, it is critical to ensure all outstanding violations or fees tied to that vehicle have been resolved.

User - Parking Tab

This article provides instructions for OPS-COM administrators on how to purchase both standard and temporary parking permits on behalf of a user. All actions are performed from the **Parking** tab within the user's profile, which serves as the central hub for managing a user's parking permissions.

Setup & Configuration

Before permits can be sold, all parking lots, permit types (e.g., yearly, monthly, temporary), and associated costs must be configured in the system. For more details on this process, please refer to the *Pricing & Lot Admin* page.

The process begins by navigating to the specific user's profile.

Navigating to the Parking Tab

1. Hover over the **User Management** tab and click **User Search**.
2. Use the search fields (e.g., **name**, **username**, **email**, or **account number**) to find the desired user.
3. From the search results, click the user's **Username** to open their **Profile Page**.
4. Click the **Parking** tab to navigate to the **Manage Lots** screen for that user.

Purchasing a Standard Permit

1. On the **Manage Lots** screen, locate the desired parking lot.
2. Click the **Standard Permit** button associated with that lot.
3. On the **Confirm Parking Permit Registration** screen, review the details, including location, permit type, and cost. You may have the option to edit the **permit number** and **permit cost** here.
4. Click the **Purchase this Permit** button and proceed with the payment process to finalize the registration.

Purchasing a Temporary Permit

1. On the **Manage Lots** screen, click the **Temporary Parking Permit** button.
2. On the **Temp. Parking Permit Registration** screen, configure the permit details:
 - Click the **Select a lot** drop-down menu and choose the appropriate lot.
 - Enter the **start and end dates** for the permit.
 - Choose the **temporary permit type** (e.g., all day or hourly).
 - Select the **vehicle** the permit will be assigned to.
 - Confirm the **Permit Number**.
 - Enable the **DNTT (Do Not Ticket or Tow)** checkbox if this temporary permit should prevent violation issuance.
3. Click the **Confirm this Permit** button.
4. On the **Confirm Parking Permit Registration** screen, review all the details one final time.
5. Click the **Purchase this Permit** button and proceed with the payment process.

Best Practices & Considerations

Using the Waitlist: If you attempt to purchase a standard permit for a lot that has no available inventory, the system will not allow a purchase. Instead, you can click the **Waiting List** link to add the user to the queue for that lot. A prompt will appear to confirm the action.

When to Use DNTT: The **DNTT** checkbox on temporary permits is a powerful tool. It is typically used for special circumstances, such as for guest speakers or visitors, where you want to ensure their vehicle is not ticketed for the duration of their temporary permit.

User - Payments Tab

The **Payments tab** allows administrators to process user payments for one or all payment types due (lockers, parking permits, temporary permits, access card, violations). This page also shows any financial adjustments that have been made to a user account.

Processing a Payment on Behalf of a User

Purpose and Overview

This article outlines the process for OPS-COM administrators to make a payment on behalf of a user. This functionality is essential for handling phone-in payments, in-person transactions, or assisting users who are unable to complete the payment process themselves. These instructions are intended for administrative staff with payment processing permissions.

Setup & Configuration

No special configuration is required to use this feature, provided that your organization's payment gateway and item pricing have already been configured. For more details on these initial setups, please refer to the *Payment Gateway Configuration* and *Pricing & Lot Admin* articles.

Using this Feature

Follow these steps to process a payment for a user account.

1. Navigate to the user's profile. Hover over **User Management** and click **User Search**.

2. Use the search fields to find the user by their **Name, Username, Email, or Account Number**. Click the user's **Username** in the search results to open their **Profile Page**.
3. Click the **Payments** tab. A list of outstanding items such as violations or permits will be displayed.
4. **Enable the checkbox** next to each item you wish to include in the payment.
 - **View Item Details:** Click on any item name highlighted in blue to view more detailed information. If you make any changes in the detail view, you must click the **Update** button to save them.
 - **Remove an Item:** To permanently remove an item from the user's account, click the corresponding **Remove** button.

Warning: The **Remove** action is permanent and cannot be undone. Use this with caution, as the item will be completely removed from the user's account, not just the current transaction.

5. After selecting all items, click the **Proceed to Payment** button.
6. On the **Payments Due** screen, review the transaction summary. Select the payment method from the **Payment Type** drop-down menu and click **Submit Payment Information**.
7. A final confirmation screen will appear. Verify that all payment details are correct and click **Confirm Payment Information**.
8. You will be directed to the **Transaction Details** screen. Before finalizing the payment, you have two primary options:
 - **Adjust:** Click to modify the payment total. This is useful for applying a discount or adding a surcharge.
 - **Cancel Transaction:** Click to completely cancel the payment process. The items will remain on the user's account as outstanding.
9. To complete the transaction, click the **Process Manually** button. For credit card transactions with an integrated payment gateway, this process may occur automatically.
10. Once the payment is accepted, a transaction confirmation number will be displayed. From this screen, you can perform post-payment actions such as making an adjustment or issuing a refund.

Best Practices & Considerations

- **Double-Check Before Confirming:** Always verify the selected items and payment amount with the user before clicking **Confirm Payment Information**, as reversing a transaction is a more involved process.

- **Understand Manual vs. Automatic Processing:** Be aware of how your system is configured. If a payment gateway is active, credit card transactions are typically processed in real-time. Manual processing is used for cash, cheque, or other offline payment methods.
- **Use the Cancel Button to Abort:** If there is any uncertainty or error discovered before final processing, use the **Cancel Transaction** button to safely exit the workflow without financial impact.

User - History Tab

This article explains how OPS-COM administrators can access and manage a user's complete transaction and activity history. The **History** tab provides a detailed log of all financial transactions, permit activity, and system-recorded events associated with a user's account, allowing for audits, adjustments, and user support. This guide is intended for all administrators who manage user accounts.

Setup & Configuration

This is a core feature within the **User Profile Page** and does not require any special setup or configuration.

Using this Feature

The **History** tab is the central location for viewing and interacting with a user's historical data.

Accessing the User History Tab

1. From the main menu, hover over **User Management** and click **User Search**.
2. Search for the desired user using their **name**, **username**, **email**, or **account number**.
3. Click on the user's **username** in the search results to open their **Profile Page**.
4. Hover over the **History** tab.
5. Click on **Recent History** to view the user's activity log.

The **Recent History** view displays the most recent 100 records for the selected user. This list includes records for items such as **Locker**, **Parking**, **Enforcement Adjustment**, **Address**, and **Mail Records**.

Available Actions & Buttons

The **History** tab provides several options for managing user data and transactions.

- **Adjust:** Click the **Adjust** link next to a processed transaction to modify it. After making changes, click the **Add Adjustment** button to save.
 - **Item Number:** Click the link in the **Item Number** column (which may be a permit number, violation ticket number, or appeals record number) to view or edit the details of that specific item. Remember to click **Update/Save Changes** after making any edits on the item's detail page.
 - **send email:** Click the **send email** button located next to the 'Current Renter' label to compose and send an email directly to the user associated with that record.
 - **Make Payment** or **Processed:** Click this button next to a transaction to view its detailed payment processing information.
-

Best Practices & Considerations

- **Document all adjustments:** When using the **Adjust** feature, always provide a clear and detailed reason for the modification. This is crucial for maintaining a transparent and accurate audit trail.
- **Review item details before acting:** Before emailing a user or making an adjustment related to a specific item, click the **Item Number** to review its full details. This ensures you have all the necessary context to take appropriate action.

Review Emails Sent to Users

Overview

All internal communications, including mass and automatic messages sent by the system, are now able to be viewed from user profiles.

The history page now lists each message sent, making it easy to track that emails have been received by their intended recipients and are being sent as expected.

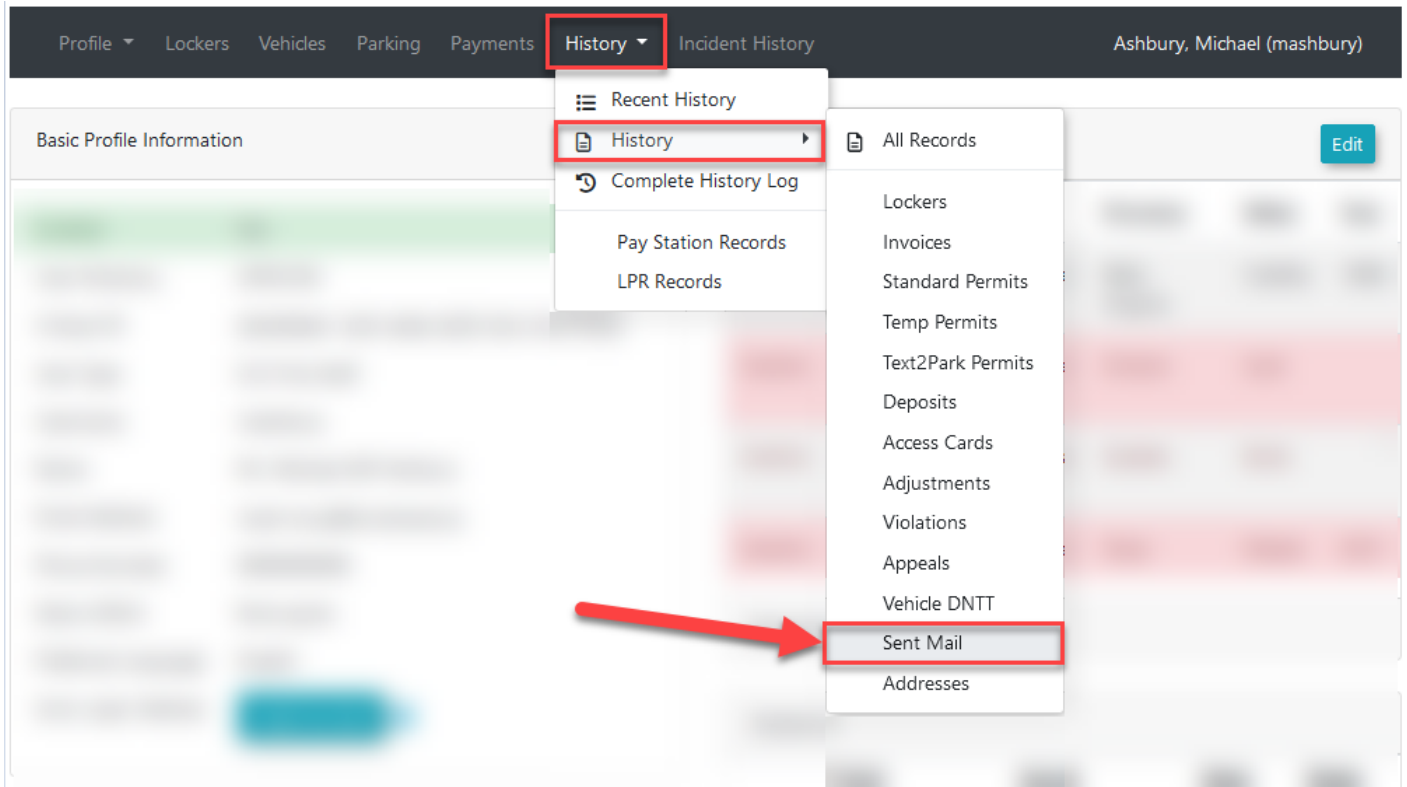
Internal and automatic messaging are generated in these situations:

- New violation notices are sent
- Overdue violation notices are sent
- A receipt is sent
- An invoice is sent

These emails will now appear in the user history page.

Viewing Emails

Emails a user has received can be viewed by going to the history section of a user's profile and selecting the sent mail page.



On the view emails page, the emails sent will be listed.


The email sent can be viewed by clicking on the subject button of the email.

Viewing Michael Ashbury's History			Complete History Log 154
Sent Mail 24			
Subject	Sender	Sent Date	
Invoice		Aug. 6, 2024	
Overdue Violation Notice (TT-19026) - OperationsCommander		Jul. 17, 2024	
New Violation Notice (TT-19025) - OperationsCommander		Jul. 9, 2024	
User Receipt		Jul. 9, 2024	
User Receipt		Jul. 9, 2024	
User Receipt		Jul. 9, 2024	
User Receipt		Jul. 9, 2024	
User Receipt		Jul. 9, 2024	
User Receipt		Jul. 9, 2024	
User Receipt		Jun. 27, 2024	
New Violation Notice (TT-19011) - OperationsCommander		Jun. 25, 2024	

This will open a popup displaying the email sent.

Violation Information	
Sent:	Jun 25, 2024 5:02 pm
Ticket #:	TT-19011
Issued:	Mar 13, 2024 3:29 pm
Due:	Mar 23, 2024 3:29 pm

[Back](#)[Close Window](#)

Actual Violation Notice Sent Print	
	

New Violation Notices

When the System Task "Send New Violation Notices" is run, it will send out notice letters to the owners of the violations by email.

The link presented on the history page will show the notice letter that was sent. This is the same view shown as when viewing the notice letter from the violation info page.

Overdue Violation Notices

When the System Task "Overdue Violation Notices" is run, it will send out notice letters to the owners of the violations by email.

The link presented on the history page will show the notice letter that was sent. This is the same view shown as when viewing the notice letter from the violation info page.

Receipts

When a user makes a payment on the website, an email will be sent to them containing the payment details.

The link presented on the history page will show a popup of the email of the receipt that was sent. Since the content of the receipt in the email that was sent can be different than is what is on an OPS-COM receipt, it will show the actual email that was sent.

Invoices

When an invoice is generated, it will be sent by email to the user set to receive it.


The link presented on the history page will show the invoice itself.

User - Incident History

We are in the process of converting this page and will update once fully converted.

There are a number of links on this page that allow administrators to get additional information or make edits to existing information.

User History

NAME	GENDER	USER TYPE	STU/EMP ID	AGE	DATE OF BIRTH
James Rockwood 	Male	Full Time Student			
Email Address:	jrockwood@tomahawk.ca				
Local Mailing Address:	aaawd Ottawa Ontario				
Local Phone Number:	6135551212				
Cell Phone:	3213213211				
License Plates:	JROCK 2 Overdue 2 Unpaid 2 Total				

GENDER	EYES	HAIR	ETHNICITY	HEIGHT	WEIGHT	IMAGE
Male	Green	White	Asian	6.0	180.0	No user images found. Edit / View Images
BUILD		HAIR STYLE		TATTOOS		

INCIDENTS (2)

NUMBER	DATE/TIME	STATUS	CATEGORY	SUB CATEGORY	LOCATION	RELATION	OFFICER	
16-0001	07/19/2016 08:00 am - 07/19/2016 08:15 am	Open	Theft	Theft from Motor Vehicle	Arena	Victim	bigpark	Details
16-0005	05/29/2016 23:00 pm - 05/29/2016 23:30 pm	Open	Weapons Offences	Pointing a Firearm CCC 87	Arena		bigpark	Details

USER NOTES

Add Note

The **User Profile** icon will open the contact's user profile.

The **Edit/View Images** button allows administrators to attach images of the user and select a default image if more than one image is on file.

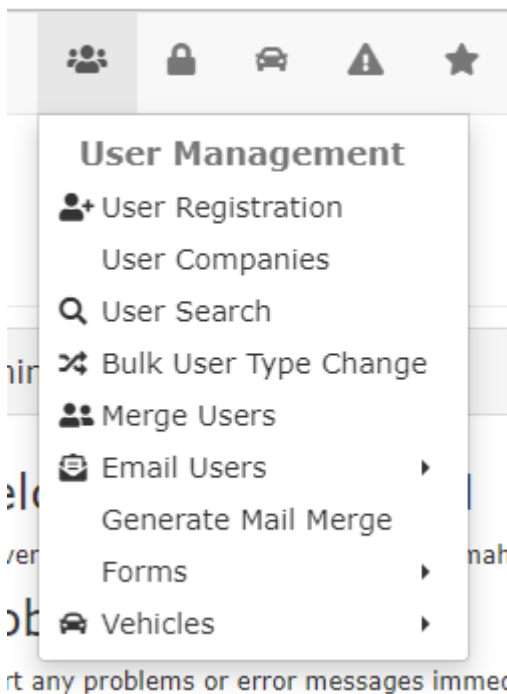
The **Details** link will link to the incident for more details.

The **Add Note** button allows administrators to add notes to the file. These notes are only visible to administrators.

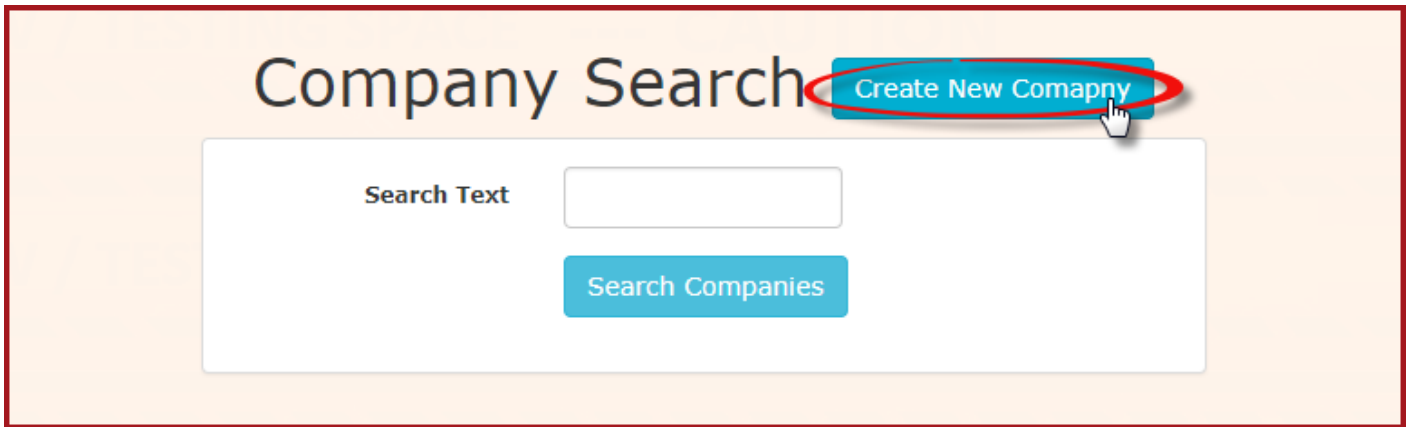
User Company Editor

Accessing the User Company Editor

Under **User Management**, click **User Companies**.



The **Company Search** window will display. To add a company click **Create New Company**.

The image shows a web interface for company search. At the top, the text "Company Search" is displayed in a large, dark font. To its right is a blue button with the text "Create New Comapny" (note the typo). A red oval highlights this button, and a mouse cursor is pointing at it. Below the title and button is a white rectangular box containing a search form. Inside the box, the text "Search Text" is followed by a white input field. Below the input field is a blue button with the text "Search Companies".

Company Search

Create New Comapny

Search Text

Search Companies

The **Company Edit** window will display. In our example we are using the following entries:

- - **Account Number:** ABC-12345
 - **Company Name:** Widgets Incorporated
 - **Address:** 100 Main Street, Ottawa, Ontario, K2K 2E6
 - **Contact Name:** John Doe
 - **Address:** 1110 Main Street, Carleton Place, Ontario, K2K 1R4
 - **Invoice Emails:** This is the email address they would like the invoices mailed to.

Once the data is entered, click **Add New Company**

Company Edit

[Back](#)

Account Number

Account Name

☐ Receives Invoice

Invoice Emails

Invoice Comments

Address

City

Province

Postal

Tenant

Phone

Fax

Contact Name

Contact Address

Contact City

Contact Province

Contact Postal

[Add New Company](#)

After you have added the company you will see a green message confirming the company has been added.

Company Edit

Back

Company has been added.

Account Number

ABC-12345

Account Name

Widgets Incorporated

Using Company Search

When we return to the Company Search page, it should be displayed as a search result.

Notice how we now have our company in place but no users at this point.

Company Search

Create New Comapny

Search Text

Search Companies

Account Number	Account Name	# of Users	
97102	Jones Windows	3	Edit
2574141	OPS-COM Corp	2	Edit
ABC-12345	Widgets Incorporated	0	Edit

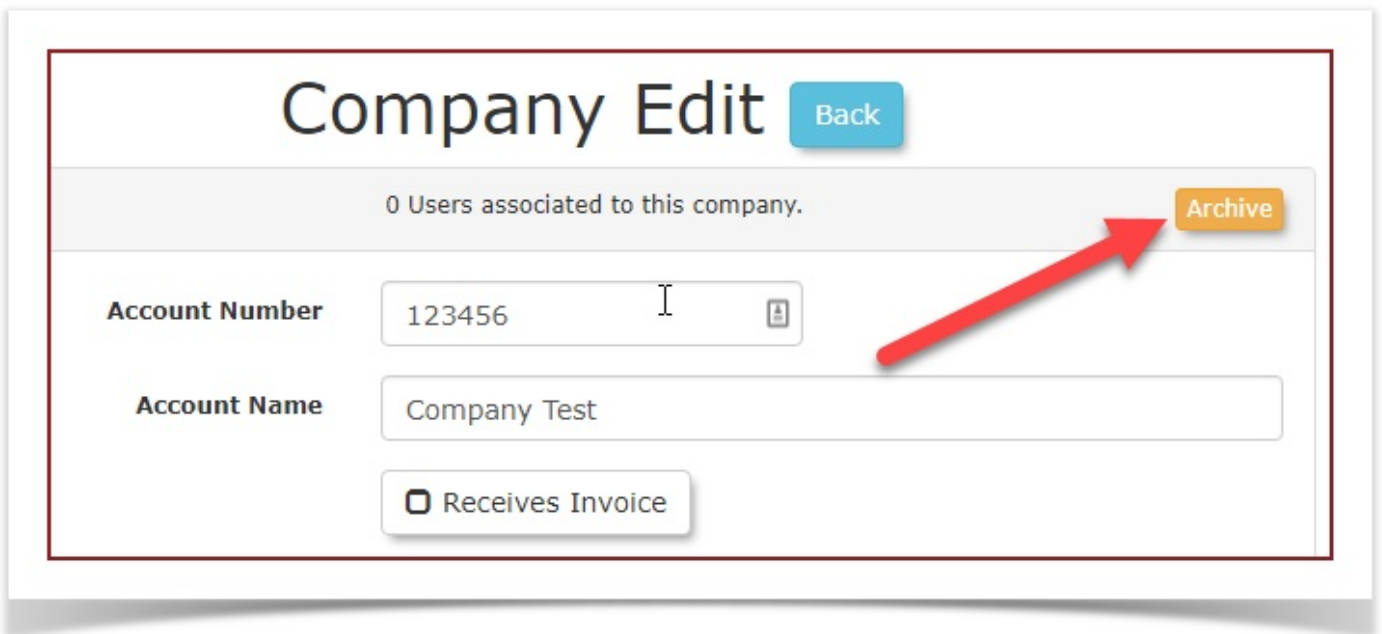
Archiving a Company

Note

Only Companies with zero associated users can be archived.


To archive a company, search for it and click the **Edit** button to open the Company Edit screen.

Click the **Archive** button in the top right hand corner.



Company Edit [Back](#)

0 Users associated to this company. [Archive](#)

Account Number 

Account Name

☐ Receives Invoice

Adding Users to a Company

To add users, navigate to the user's profile.

In our example we are adding John Doe as the company contact and the Billing Account Contact. In John's profile enter **Widgets Incorporated** in the company field to link John to that company.

Enable the **Company Manager** checkbox to select John as a Company Manager.

This will allow him to access the profiles of other people in his company.

Enable the **Company Billing Account** checkbox. This will allow him to setup a payment method to pay for all permits for users he manages.

Click '**Submit for Processing**' and then click the '**Information Correct**' button.

Personal Information

☒ Allow user login and mark account as active

User Type: Full Time Staff

Locker User Type: --- Select User Type ---

Username: johndoe

Email Address: justinbcc@tomahawk.ca

Password:

Leave this blank to keep the existing password.

Salutation:

First Name: John

Middle Name:

Last Name: Doe

Local Mailing Address: 213 Fake Street

City: Incognito

Province: Ontario

Postal Code: k7c2v3

Local Phone Number: 6136242424

Please include area code

Phone (cell):

Drivers Licence:

Location of Issuance: Select Province

Date of Birth: clear

Tax Exemption Code:

Private Comment:

Public Comment:

☒ Allow Text2ParkMe reminders

There are no credit cards on file.

☒ Company Member

☐ Individual

Company: Widgets Incorporated: ABC-12345

☒ Company Manager

☒ Company Billing Account

You can continue to add users to the company in the same manner as described above, however if you try to add another Company Billing Account contact, you will see a message that indicates that John Doe is already the current Billing Account contact.

☒ **Allow Text2ParkMe reminders**
There are no credit cards on file.

☒ Company Member

☐ Individual

Company:

Widgets Incorporated: ABC-12345

☐ Company Manager

☐ Company Billing Account

Current Billing Account:

John Doe

Go back to Search for a Company. If you click on the **number 2** , the system will take you to the user search screen displaying the 2 users associated with the company.

Company Search

Create New Comapny

Search Text

Search Companies

Account Number	Account Name	# of Users	
197102	Jones Windows	3	Edit
2574141	OPS-COM Corp	2	Edit
ABC-12345	Widgets Incorporated	2	Edit

You will see the users displayed for that Company and the Manager and Billing contact will be indicated.

		Username	FULL NAME	ADDRESS	CITY	Stu./Emp. No.	User Type
H	<input checked="" type="checkbox"/>	Manager	johndoe	Doe, John	213 Fake Street	Incognito	Full Time Staff
H	<input checked="" type="checkbox"/>	Billing Account	jrockwood	Rockwood, James	92 Baseline Road	Ottawa	Full Time Student

Bulk User Type Change

The **Bulk User Type Change** tool allows administrators to change User Types in bulk. This is useful for clients that have different parking options based on User Type.

Quick Steps:

1. Hover over **User Management** and select **Bulk Type Change**.
2. On the **Bulk User Type Change** screen, locate the user type you want to change.
3. **Click** the drop-down menu next to the user type.
4. **Select** the new user type from the list.
5. Click **Save Changes** then click on **Confirm Changes** to apply the change.
6. **Verify** the updated number of users in the new user type.

Step-by-Step Instructions:

1. **Hover over** the **User Management** section in the menu.
2. **Navigate to Bulk User Type Change:** Click on **Bulk User Type Change** from the options that appear. This will bring up the **Bulk User Type Change** screen. In the center column, you'll see a number badge next to each User Type. This represents how many users belong to that particular User Type in the system.
3. **Click the drop-down box** next to the user type you wish to change.
4. **Change user type:** From the list of available user types, select the user type you wish to replace the old one with. After making your selection, click **Save Changes** then **Confirm Changes** to apply the changes.
5. **Confirm Changes:** verify that the number of users of that type has changed to the desired number.

Merge User

The **Merge Users** option is used to combine two profiles for the same person into one user profile.

User merge will delete the user record you are merging from, so be careful how you use this tool.

Why would you use this function? You may use this function if: A person created profile in error; person gets married and changes their name; and/or the User Profile does not match the Admin created profile.

Quick Steps:

1. Hover over **User Management** and click **Merge Users**.
2. **Search** for users by entering **identification info**.
3. Select users on the left to merge into the right.
4. Click **Merge** to start the process.
5. Confirm the merge on the next screen by clicking **Merge** again.
6. **Review** the confirmation at the bottom of the page after the merge completes.

Step-by-Step Instructions:

1. **Prerequisites:** Ensure the user account is **enabled**. Check that the user has a **user type** selected. If the user doesn't show up in the merge report, visit the user's profile to confirm these settings.
2. **Access the Merge Users Tool:** Hover over the **User Management** icon. Click on **Merge Users**.
3. **Search for Users:** Enter a valid identification detail (e.g., full or partial User name, Last name, Email address, Student number or Employee number) in both search fields to locate the users.
4. **Select Users to Merge:** On the left side, select the users you want to merge into the user on the right side.
5. **Initiate the Merge:** Click the **Merge** button to begin the merge process.
6. **Confirm the Merge:** A confirmation page will pop up showing the username to merge into. Click **Merge** again to finalize.
7. **Final Confirmation:** The screen will refresh to the main page.
8. **What Happens After a Merge?:** **To User (Right Column):** The user profile on the right will remain active with updated information. **To User (Left Column):** The user profile on

the left will be archived.

9. **Transferred Data:** Data from the **FROM User** (left column) that doesn't exist in the **TO User** (right column) will be transferred to the **TO User**.
10. **Merged data includes: Vehicles, Violations, Permits, Lockers, and Items Awaiting Payment.**

Important Notes:

Ensure the **TO User** profile contains the most accurate or up-to-date information before merging.

After the merge, you can find the merge record by viewing the **Completed History** on the profile of the **TO User**.

Bulk Email Users

The **Email Users** functionality allows administrators to email users with notices or important information. There are a variety of presets that allow you to choose your recipients.

Quick Steps:

1. Hover over **User Management** and Click **Email Users**.
2. Choose a **User Type Group**.
3. Select recipient filters using **Filter by**, **Select by Lot**, and **Select by Locker Area**, as applies.
4. Click on **Prepare Email**.
5. Click **View Recipient List** to verify recipients. You also have the option to **Export the Recipient List**.
6. **Compose** your email, add attachments if needed.
7. Click **Send Email**.
8. Confirm by clicking **Yes**.
9. Wait for the confirmation message that your email has been queued.

Step-by-Step Instructions:

1. **Navigate Email Users page:** Hover over **User Management** in the main menu. Click on **Email Users**.
2. **Select user group to email:** Select the desired group to email.
3. **Choose user filters:** The **Email Users page** will open, allowing you to choose conditions and filters for your recipients. For example, selecting the **User Type Group** as **Staff** will send the email to all staff members. If you choose **User Type Group: Staff** and **Company Staff Lot**, the email will be sent only to staff members who park in the company staff lot, and so on. If you wish to select multiple filters hold control and click on the filters that apply. To deselect a filter already selected, hold control and select the individual filters you wish to remove.
4. **Prepare email:** After selecting your recipient list, click the **Prepare Email** button.
5. **View recipient list:** Click the **View Recipient List** button to review your email recipients.
6. **Create email** Type in a **Subject** and a **Message**.
7. **Attach files:** If needed, attach files by clicking the **Choose File** button.
8. **Send email:** Once your email is ready, click the **Send Email** button.
9. **Confirm:** A confirmation dialog will appear. Click **Yes** to confirm.
10. **Confirm email was sent:** A message stating **Mail message has been queued for delivery** will display.