User Management

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Registering a New User

> To start using the **OPS-COM User Portal**, all customers must register as a new user. User Registration allows administrators to register a user manually. This will allow access to features such as purchasing parking permits, renting lockers, and managing violations.

Quick Steps:

1. Go to **User Management>User Registration**.
2. Fill in the **User Type, Username,** and user info in the **User Registration Form** and click **Submit Registration**.
3. On **Edit User Profile** page, enable **Allow user login and mark account as active** checkbox.
4. Complete the mandatory fields in the **Edit User Profile** screen.
5. **Submit Profile Information** and confirm the information. If correct click **Information Correct**.
6. Registration is complete. Add a vehicle or purchase a permit if needed.

Step by Step Instructions:

1. Under **User Management** menu, click on **User Registration**.
    - The **User Registration Form** will appear.
    - Fill out the initial standard information:
        - Select the **User Type**.
        - Enter the **Username** and **required user information**.
2. Click **Submit Registration** to move to the next page.

On the Edit User Profile page:

1. Enable the **Allow user login and mark account as active** checkbox.
    - This setting will allow the user to self-manage their account via the **User Portal** and prompt them to change their password.
2. Complete profile information and any mandatory fields.
    - Click **Submit Profile Information**.
    - The **Confirm Registration Information** screen will appear.
        - Verify all information is correct.
        - If edits are needed, click **Back**.
        - When ready to proceed, click **Information Correct**.
3. Complete registration:
    - You will be directed back to the **Edit User Profile** screen where a pop up will let you know that the user profile was successfully updated.

- You can now proceed to the correct menu to add a vehicle or purchase a permit for the user.

Fields marked with a red exclamation (!) after failed submission are mandatory fields that must be completed.

Admins with proper permissions can adjust which fields are mandatory.

User Profile Landing Page

> The User Profile Landing Page is the first page you are presented with when accessing a user's profile. It is a quick reference dashboard of the user's profile information and current user history.

Quick Steps:

Using **Quick Search** or **User Management>User Search** you can quickly and easily navigate to the user's profile.

Editing a User's Profile

- Click **Edit** in **Basic Profile Information.**

Adding or Editing Vehicles

- Click **Edit** in **Vehicles** to add, remove, or edit vehicle details.

Logging in as a User

- Click **Login as user** from the **User Profile** page. This will launch a new browser window and log you in as the selected user with all the functionality associated with that user. (Ensure Auto Login is set in System Settings)

View Additional Information

- Access vehicles, alarms, violations, active permits, and uploaded files from the dashboard. If any warnings or alerts exist in the user's profile, they will be displayed at the top of the page.
  - Click **Ticket** numbers and **Permit** numbers for more details.
  - View photos by clicking the camera icon in **Violations**.

Step by Step Instructions:

Editing a User's Profile

1. Navigate to the **Basic Profile Information** section.
2. Click **Edit** in the section header.
3. The full profile page will display, allowing you to edit the user's account details.

Adding or Editing Vehicles

1. Go to the **Vehicles** section.

2. Click **Edit** in the section header.
3. You will be taken to the **Vehicle Information** screen where you can:

€ €• Add new vehicles.

€ €• Edit or remove existing vehicles.

€ €• Apply a **DNTT** (Do Not Ticket Tag) to a vehicle.

Logging in as a User

1. On the User Profile landing page, click **Login as user**.€ € € € € €
2. A new browser window will open, logging you into the OPS-COM end-user interface as the selected user, with all associated functionalities.

> **Note**: That you may experience an error if **Auto Login** is not configured correctly in **System Settings**. Please contact opscom for support.

Additional Information: Alarms, Violations, and Permit Details

1. The user dashboard provides access to:

€ €• Alarms

€ €• Violations

€ €• Permit details

2. Alerts or warnings will be displayed at the top of the dashboard.
3. **Violations**:

€ €• View violation details by clicking the ticket number in the **Violations** section.

€ €• View photos by clicking the camera icon next to the ticket number.

4. **Permits**:

€ €• Access permit details by clicking the permit number in the **Active Permits** section.

Payment Management (Subscriptions)

> Subscriptions are used to allow you to tag a default method of payment for any permits that you roll over from month to month. You can use payroll deductions, EFT, or credit cards as payment methods for subscriptions. Subscriptions only affect permits that are being rolled over from a previous allocation period. Users can manage multiple payment methods on their account through the user portal but only one method may be set as primary. Admins can also add payment method details to a user profile.

> In order for subscriptions to function, the user must provide information pertaining to the payment method they wish to use for their subscription service.

There are three main payment types that are used for subscription services:

- Electronic Funds Transfer (Must be entered in the system by an Administrator)
- Credit Card (Can be entered both by the client through their online profile as well as by an Administrator)
- Payroll Deduction (Handled by the Administrator through the OPS-COM System)

Quick Steps:

1. Search and select the **User Profile**.
2. Using the **Profile** dropdown, click **Manage Payment Methods**.
3. To add a payment method click **Add New Payment Method** under **Payment Subscription Options.**
4. To use a payment type for recurring payments or to be auto-charged for Permit Rollovers, click the drop down and chose the payment type from the dropdown under **Permit Rollover Subscription** and then click **Save.**
5. You will see a popup indicating that your permit rollover subscription has been updated.

Step by Step Instructions:

1. **Search for the User**:
   - Use the **Quick Search** or **User Search** functions to locate the user whose credit card you want to manage.
   - Select the **User** to access their **Profile**.

2. **Access Manage Payment Methods**:
   - Use the **Profile** menu dropdown to choose **Manage Payment Methods**.
3. **Add a Payment Method**:
   - Under **Payment Subscription Method** on the right side of the screen, click **Add New Payment Method**.
   - When you have added your credit card information, click **Add Payment Method** button to register in the system.
   - If choosing **EFT (Electronic Funds Transfer)** as your new payment method, you will need to also fill out a Label (typically the bank name and type of account ie: Savings) and the user's banking information before clicking **Add Bank Information** button to register in the system.

> Note: EFT can only be used for subscriptions and cannot be used to pay for any other items.

1. **Add Permit Rollover Subscription**:
   - Choose the **Payment Method** from the dropdown list under **Permit Rollover Subscription** on left side of screen.
   - Click **Save**.
   - You will see a popup indicating that the subscription payment method has been saved/updated.

> To do this, Admins must have the **Allow Credit Card Processing** setting turned on in **System Settings>Permits.**

> To use this card to pay for recurring permits, the user must have purchased his previous permit through the same payment type so that the system would have a record of the payment type used.

Using Tax Exemption

> Tax Exemption Codes are supported in the OPS-COM system. If a user has a tax exemption code on their profile, taxes will not be charged when they purchase items such as permits, violations and lockers.

Quick Steps:

1. Search for and select the **User Profile**.
2. Under **Profile>Edit Profile Information**, add or update the **Tax Exemption Code** field on the **Edit User Profile** screen.
3. Click **Submit Profile Information** and then **Confirm Information Correct** buttons.
4. Verify the code is correct in the **Profile Overview** window.
5. Ensure tax-exempt transactions do not display taxes on the payment page.
6. Run and export the **Tax Exemption Report** from the **Payments** menu as needed.

Step by Step Instructions:

1. **Search for the User**:
   - Use the **Quick Search** or **User Search** functions to locate the user profile you want to edit.
2. **Edit the Profile**:
   - Open the **User Profile** and under **Edit Profile Information** locate the **Tax Exemption Code** field.
   - This field supports alphanumeric characters and is present on both new and existing profiles.
3. **View Tax Exemption Code**:
   - The **Tax Exemption Code** is displayed in the **Profile Overview **window for easy reference.
4. **Tax-Free Transactions**:
   - When purchasing a permit for a user with a tax exemption code, taxes will not appear as a line item on the payment or confirmation page.
5. **Tax Exemption Report**:
   - Generate the **Tax Exemption Report** from the **Payments** menu.
   - This report includes three fields: **First Name**, **Last Name**, and **Tax Exemption Code**.
   - You can copy or export the report records for further use.

User Search

> **User Search** allows administrators to find user information to view/edit.

Quick Steps:

1. Go to **User Management** > **User Search**.
2. Enter your search criteria and choose whether to display **Any Users, Enabled Only or Disabled Only**.
3. You can also choose to click the **Toggle More Options** button in the top right of the screen to choose from even more search options.
4. Click **Search**.
5. Review the results table.

Step by Step Instructions:

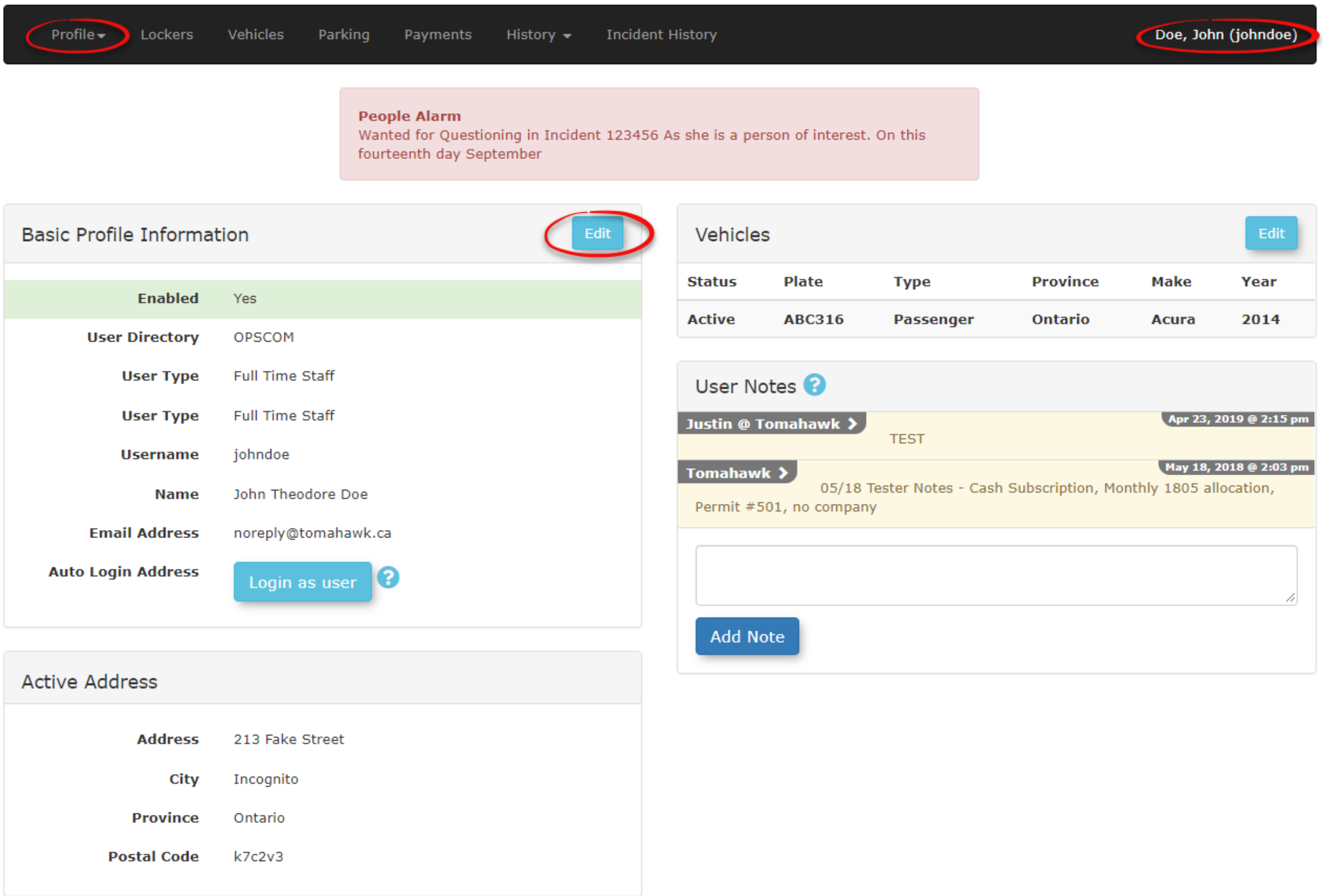
1. **Access User Search**:
   - Hover over **User Management**.
   - Click **User Search**.
2. **Enter Search Criteria**:
   - Use the fields on the **User Search** screen to input your search criteria.
   - Use the radio buttons to narrow your search with **Enabled Only, Any Users, or Disable Only**.
   - To narrow your search even further, use the **Toggle More Options** button at top right to display more search criteria.
3. **Perform the Search**:
   - Click **Search** to retrieve results.
4. **View Results**:
   - The search results will appear in a table below the criteria box.

Archiving or Disabling a User

Archive Process

Locate the User you wish to edit/update by searching for a user. Click on the **Username** and the **Profile Dashboard** will display for that user.

On the top right-hand corner you will see the name of the user that changes will be applied to.



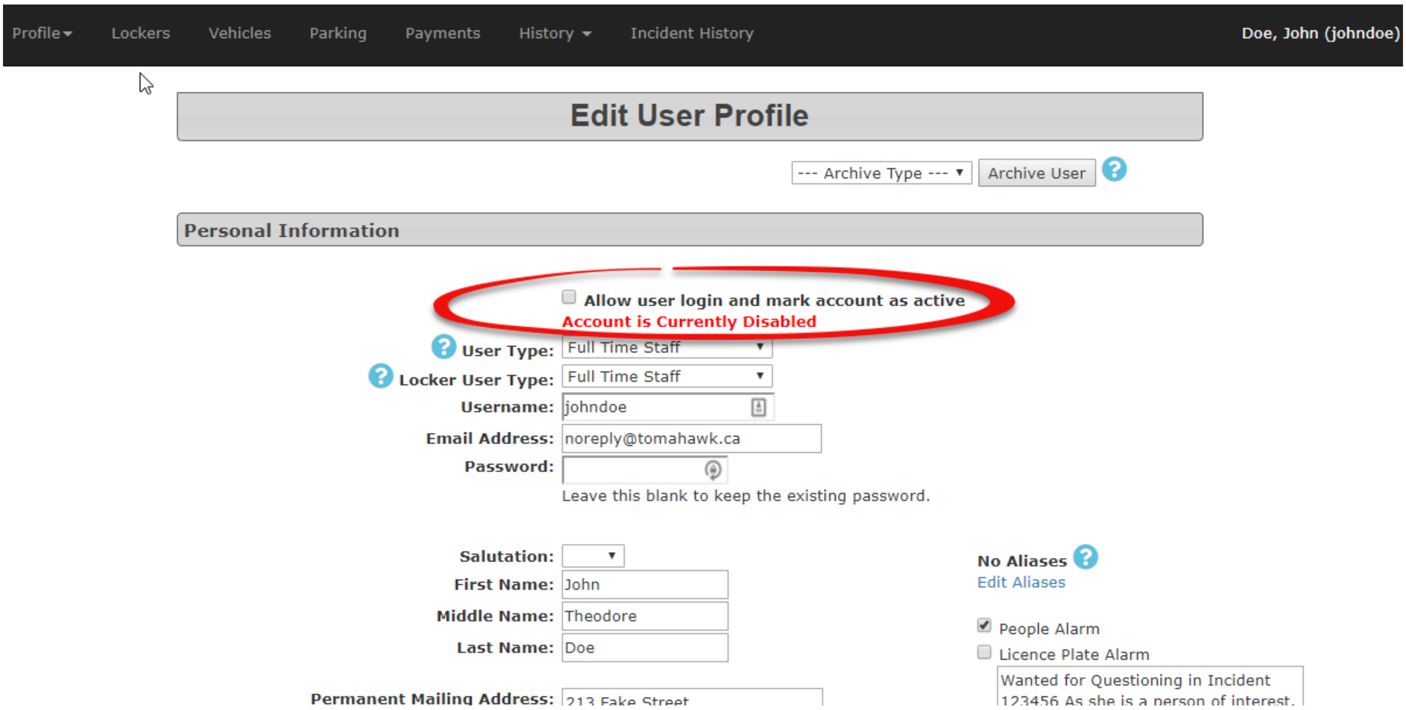
Click the **Edit** button on the **Basic Profile Information** bar or click the **Profile** dropdown and click **Edit Profile Information**.

The **Edit User Profile** screen is displayed.

Disable User Account

Disable the **Allow user to login and mark account as active** checkbox.

Click the **Submit Registration Information for Processing** button at the bottom of the page.

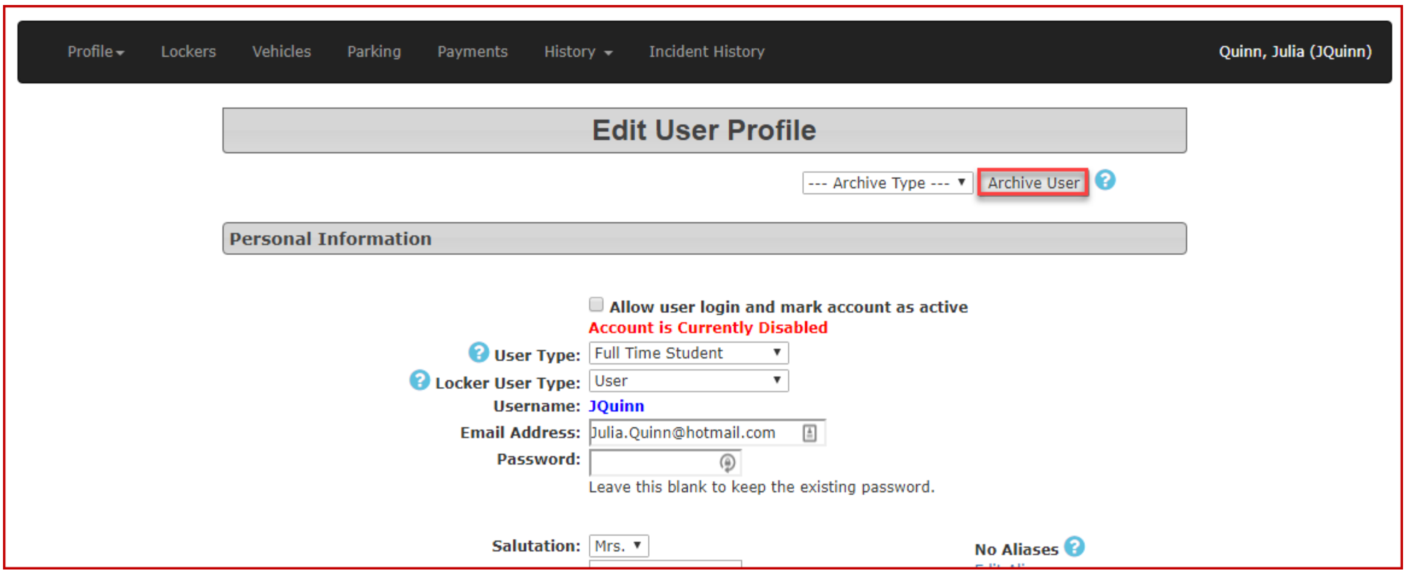


Click the **Information Correct** button to submit the change.

Archive User Account

Follow the steps above to locate and disable a user. Now choose an **Archive User Type** from the **Archive Type** dropdown list.

Click the **Archive User** button and click **OK** on the confirmation pop-up.



User - Purchase a Locker

> 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.

Quick Steps:

1. Search for the user and open their **Profile Landing Page**.
2. Click **Lockers** to access the locker registration system.
3. Select a building under **Available Buildings**.
4. Make a selection from the dropdown menu of the type of locker you wish to register (ie: Men's Locker Room).
5. Select a locker number and click **Reserve this Locker**.
6. Verify details on the **Confirm Locker Registration** screen and click **Confirm Information**.
7. Process payment on the **Payments Due** screen by clicking **Proceed to Payment**.

Step by Step Instructions:

1. **Locate the User**:
   - Search for the user you want to register a locker for.
   - Click on the **Username** to open the **Profile Landing Page**.
2. **Access Lockers**:
   - Click on **Lockers** in the **User Profile**.
   - Confirm the user’s name in the top-right corner to ensure changes are applied to the correct user.
3. **Select a Building**:
   - The **Locker Registration** screen will appear.
   - Select a building under **Available Buildings**.
4. **Choose a Location**:
   - On the **Locker Registration - Locker Selection** screen, use the dropdown menu to select a location within the building ie: Men's Locker Room.
5. **Reserve a Locker**:
   - Select a locker number to assign to the user.
   - Click **Reserve This Locker**.
6. **Confirm Reservation**:
   - The **Confirm Locker Reservation** screen will appear.
   - Verify all details and click the **Confirm Information** button.
7. **Process Payment**:
   - The **Payments Due** screen will display.
   - Proceed with processing the payment by clicking **Proceed to Payment**.

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.

Quick Steps:

1. Click on the **User Management tab** and click **User Search.**
2. Search for the user using either a **name**, **username**, **email** or **account number.**
3. Click on that user's **username** to enter that user's **Profile Page**.
4. Click on **Vehicles** to enter that user's **Vehicle Information page.**
5. **Add Vehicle:** Click **Add New Vehicle**.
6. Fill out details and click **Add New Vehicle** to save.
7. **Edit Vehicle**: Click the **Plate** link.
8. Edit details and click **Update Vehicle**.
9. **Activate/Deactivate Vehicle**: Click **Active** to toggle the vehicle as active or inactive.

Step-by-Step Instructions:

1. **Locate user search:** Click on the **User Management tab** and click **User Search.**
2. **Search for a user:** Search for the user using either a **name**, **username**, **email** or **account number.**
3. **Locate the user profile page:** Click on that user's **username** to enter that user's **Profile Page**.
4. **Locate the vehicle information page:** Click on **Vehicles** to enter that user's **Vehicle Information page.**
5. **Adding a new vehicle:** Click the **Add New Vehicle** button.
6. **Fill in vehicle information:** The **Add New Vehicle Information** screen will appear. Fill in all the required vehicle details.
7. **Save your new vehicle:** Once you've entered all the information, click the **Add New Vehicle** button to save.
8. **Confirm that the vehicle is added:** The **Vehicle Information** screen will display again with the new vehicle added.
9. **Editing a vehicle:** Click the **Plate** link to open the **Vehicle Information** window.
10. **Make your changes:** Make any necessary changes.
11. **Save your changes:** Click **Update Vehicle** to save your changes.
12. **Activating or Deactivating a Vehicle:** In the **Status** section of the vehicle details, click the **Active** or **Inactive** link to change the vehicle's status.
13. **Removing a Vehicle**: In the user's profile, locate the vehicle and click the **X** button next to the vehicle's record to start the removal process.

> A vehicle can be removed from a user's profile, but not completely deleted from the system. Use this option if:

- The vehicle changes ownership.
- The vehicle was mistakenly assigned to the wrong user.
- A vehicle with only one user will be archived after removal.
- A vehicle with multiple users will be removed from the profile you’re working on, but remain under the second user's profile.

14. **Finalize removal:** Once you click **OK**, the vehicle will be removed from the profile. It will still exist in the system but no longer be associated with the user.

> **Important**: Before removing a vehicle, make sure to clear any outstanding balances if there's only one user.

15. **Record DNTT Link**: This option allows you to add, remove, or edit the **Do Not Ticket or Tow (DNTT)** notation for a vehicle. This notation prevents a vehicle from receiving violations in certain conditions (e.g., a specific lot or time).

User - Parking Tab

> The **Parking tab** allows administrators to sell parking permits (standard parking permits and temporary parking permits) to users.

Quick Steps:

1. Click on the **User Management tab** and click **User Search.**
2. Search for the user using either a **name**, **username**, **email** or **account number.**
3. Click on that user's **username** to enter that user's **Profile Page**.
4. Click on the **Parking tab**.
5. **Purchasing a standard permit:** Click on **Standard Permit.**
6. Here you can edit the **permit number** and **permit cost**.
7. Click on **Purchase this Permit** and proceed to payment.
8. **Purchasing a temp permit:** Click **'Temporary Parking Permit'**.
9. **Select** lot, dates, and permit type.
10. **Confirm** permit details and **purchase**.

Step-by-Step Instructions:

1. **Locate the user search:** Click on the **User Management tab** and click **User Search.**
2. **Search for a user:** Search for the user using either a **name**, **username**, **email** or **account number.**
3. **Enter user profile page:** Click on that user's **username** to enter that user's **Profile Page**.
4. **Enter the Manage Lots page:** Click the **Parking tab.** This will take you to the **Manage Lots** screen.
5. **Purchasing a Standard Permit:** Click the **Standard Permit** button on the lot you wish to buy a permit for. The **Confirm Parking Permit Registration** screen will display. This list shows the lot's location, permit type (yearly, monthly, etc.), and the number of permits still available for sale.
6. **Waiting list:** If no permits are available for a chosen lot, click the **Waiting List** link to add the user to the waiting list. A pop-up will appear. Click **Yes** to confirm.
7. **Purchase Permit:** After confirming the lot details, click the **Purchase this Permit** button and proceed to payment.
8. **Temporary Parking Permit:** In the **Manage Lots page** click the **Temporary Parking Permit** button. The **Temp. Parking Permit Registration** screen will appear.
9. **Select a lot:** From the drop-down menu, select a lot, and enter the start and end dates for the permit.

10. **Temporary permit type:** Choose the type of temporary permit (all day or hourly), and select the vehicle it applies to.
11. **Confirm the Permit number:** Confirm the **Permit Number** and enable the checkbox for **DNTT** (Do Not Ticket or Tow) if needed.
12. **Confirming the permit:** Click **Confirm this Permit**. The **Confirm Parking Permit Registration** screen will appear.
13. **Review and purchase:** Review the permit details and click **Purchase this Permit** then proceed to payments.

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.

Quick Steps:

1. Click on the **User Management tab** and click **User Search.**
2. Search for the user using either a **name**, **username**, **email** or **account number.**
3. Click on that user's **username** to enter that user's **Profile Page**.
4. Click on the **Payments tab.**
5. **Enable checkboxes** for items you wish to pay for.
6. **Click** on blue items for more info; click **Update** to save any changes.
7. if you wish to remove an item click the **Remove button** (no undo) to remove that item.
8. Click **Proceed to Payment**.
9. Review and submit payment details, then click **Submit Payment Information**.
10. Verify and click **Confirm Payment Information**.
11. Final chance to edit or cancel the payment.
12. Click **Adjust** for changes to the cost.
13. **Process Payment**: Click **Process Manually** or wait for automatic processing.
14. Check the transaction confirmation number and make any needed adjustments or refunds.

Step-by-Step Instructions:

1. **Locate user search:** Click on the **User Management tab** and click **User Search.**
2. **Search for a user:** Search for the user using either a **name**, **username**, **email** or **account number.**
3. **Locate user profile page:** Click on that user's **username** to enter that user's **Profile Page**.
4. **Locate payments tab:** Click on the **Payments tab.**
5. **Select Items to Apply Payment:** Enable the checkboxes for the items you want to pay for.
6. **View More Details:** Click on any item in blue to access more detailed information. If you make any changes, always click the **Update** button to save them.
7. **Remove Items:** To remove an item, click the **Remove** button. Be cautious, as there is no undo option for this action.
8. **Make a Payment:** Click the **Proceed to Payment** button. The **Payments Due** screen will appear.

9. **Confirm Payment Details:** Review the payment details on the **Payments Due** screen. Select the payment method from the drop-down list. Click the **Submit Payment Information** button.
10. **Payment Confirmation:** The **Payments Due** confirmation screen will appear. Verify all payment details and click the **Confirm Payment Information** button.
11. **Transaction Details:** This takes you to the **Transaction Details** screen. You can make final changes to the payment here. If needed, click the **Cancel Transaction** button to cancel the payment and return the items to inventory.
12. **Adjust Payment (Optional):** If you need to adjust the payment amount, click the **Adjust** button. This can be done before or after completing the transaction.
13. **Process the Payment:** For systems connected to a payment provider (gateway), credit card payments are processed automatically. To process manually, click the **'Process Manually'** button.
14. **Accepted Payment Confirmation:** After processing, a transaction confirmation number will be shown. You will also have the option to make adjustments or refund the payment.

User - History Tab

> The **History tab** allows administrators to view/edit all transactions and adjustments (locker reservations/rentals, permit reservations/payments, violations/payments, appeals/payments, DNTT records and email records) on a user's account.

Quick Steps:

1. Click on the **User Management tab** and click **User Search.**
2. Search for the user using either a **name**, **username**, **email** or **account number.**
3. Click on that user's **username** to enter that user's **Profile Page**.
4. Click on the **History tab**.
5. Click on **Recent History** which is located in the **History tab** for the latest 100 records.
6. Use the **Adjust** link to modify processed payments.
7. Click the **Item Number** button to view or edit details of specific items. additionally you can email users by clicking the **send email** button located next to '**Current Renter:'.**
8. Click **Update/Save Changes** after making any changes.
9. Click on the **Make Payment** or **Processed** button to view payment processing details.

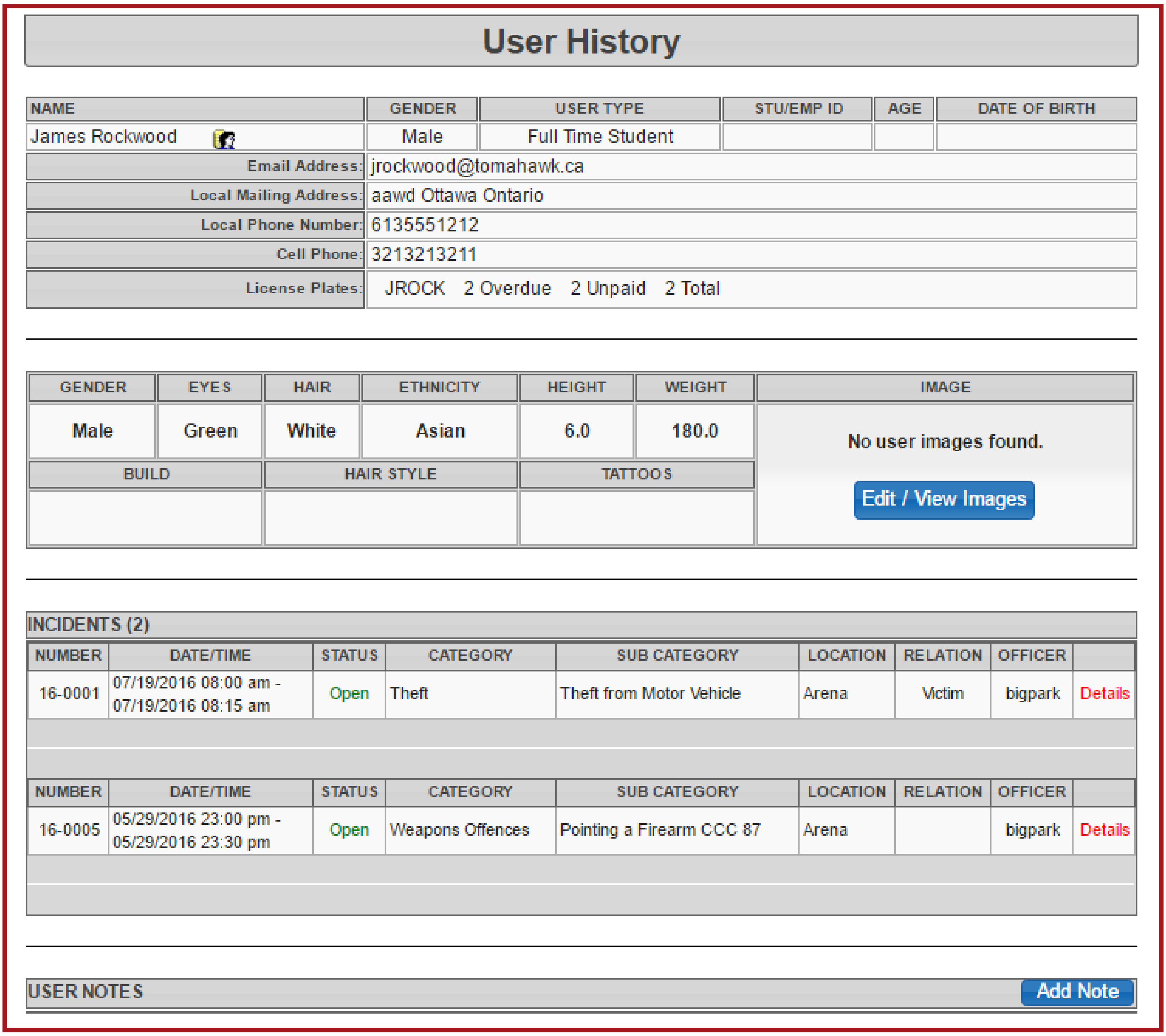
Step-by-Step Instructions:

1. **Locate User Search:** Click on the **User Management tab** and click **User Search.**
2. **Search for a user:** Search for the user using either a **name**, **username**, **email** or **account number.**
3. **Locate the User Profile page:** Click on that user's **username** to enter that user's **Profile Page**.
4. **Locate the recent History tab:** Click on the **History tab** then click **Recent History.** The recent **History** page will display the most recent 100 records for a user. This list includes records for items such as **Locker**, **Parking**, **Enforcement Adjustment**, **Address**, and **Mail Records**.
5. **Adjust a Payment**: Click on the **Adjust** button to modify any processed transactions or payments.
6. **Save Adjustment:** Click on the **Add Adjustment** button to save your changes.
7. **Item Number**: Click the **item number** button (for locker number, permit number, violation ticket number, or appeals record number) to view or edit the details of the corresponding item.
8. **Email User:** You can email users by clicking the **send email** button located next to '**Current Renter:'.**
9. **Update**: Once edits are made, click **Update** to save your changes.
10. **Manage Payments:** Click on the **Make Payment** or **Processed** button to view payment processing details.

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.



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.

Unlink a Vehicle from User Profile

> Users come and go in the system, and so do their associations to vehicles. This page deals with the case of a user that is no longer associated to a vehicle.

Quick Steps:

1. Click on the **User Management tab** and click **User Search.**
2. Search for the user using either a **name**, **username**, **email** or **account number.**
3. Click on that user's **username** to enter that user's **Profile Page**.
4. Click on the **Vehicles tab** in the top menu bar.
5. Find the vehicle to remove.
6. **Click** the red **"X"** button next to the vehicle.
7. **Confirm** by clicking **OK.**

Step-by-Step Instructions:

1. **Navigate to User Search:** Click on the **User Management tab** and click **User Search.**
2. **Search for the User:** Use the **User Search** function to find the profile of the user you want to unlink a vehicle from.
3. Search for the user using either a **name**, **username**, **email** or **account number.**
4. **Select the User Profile:** After finding the user in your search results, click on their profile to open it.
5. **Navigate to the Vehicles Tab:** Once in the user's profile, click on the **Vehicles** tab on top menu bar. This will refresh the page and display the list of vehicles linked to the user.
6. **Locate the Vehicle to Remove:** In the list of vehicles, find the vehicle you wish to unlink.
7. **Remove the Vehicle:** Click the red **"X"** button located to the right of the vehicle you want to remove.
8. **Confirm the Removal:** A confirmation pop-up will appear. Click **OK** to confirm the removal of the vehicle.
   If you change your mind, click **Cancel** to return to the vehicle list without making any changes.

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 with 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 chose 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.

Edit Primary Driver

> The designation **Primary Driver** is put in place to identify the owner of the vehicle in most cases. A vehicle can be in the system under two or more user profiles but there should only be one primary driver per vehicle.

> **Why is there a Primary Driver?** The **Primary Driver** will receive important communications about the vehicle such as violation notices. A nightly script assigns a **Primary Driver** to any vehicle added to the system. If there is no **Primary Driver** on a vehicle when an appeal is submitted, the person submitting the appeal will automatically be set as the **Primary Driver**.

Quick Steps:

1. Hover over **User Management** and Click **User Search**.
2. Search for the user using either a **name**, **username**, **email** or **account number.**
3. Click on that user's **username** to enter that user's **Profile Page**.
4. Click on the **Vehicles tab**.
5. Find the vehicle and click the **Plate** button.
6. In the **Edit Vehicle** popup, select the **Primary Driver** dropdown, if the vehicle has more than one driver.
7. Choose the new **Primary Driver** from the list.
8. Click **Update Vehicle** to save.

Step-by-Step Instructions:

1. **Navigate to User Search:** Hover over **User Management** and Click **User Search**.
2. **Search for a user:** Search for the user using either a **name**, **username**, **email** or **account number.**
3. **Navigate to Vehicles tab:** Go to the user's profile and click the **Vehicles** tab.
4. **Navigate to Edit Vehicle screen:** To change the **Primary Driver**, click on the **Plate** link to open the **Edit Vehicle** screen.
5. **Locate Primary Driver:** In the **Edit Vehicle** popup, locate the **Primary Driver** field, which is a dropdown menu. If the vehicle has more than one driver, you'll see a list of drivers. The current **Primary Driver** will be highlighted in bold.
6. **Choose a new Primary Driver:** Click the dropdown to choose a new **Primary Driver** from the list.
7. **Save changes:** After selecting the new driver, click **Update Vehicle** to save the changes.

8. **Confirm changes:** The **Primary Driver** will now be updated, and the new driver will be displayed as the primary driver in bold. Verify that the correct **Primary Driver** is listed.

> Occasionally, there might be legacy records where multiple **Primary Drivers** are associated with the same vehicle. To fix this, follow the steps above to select the correct **Primary Driver**. The system will automatically remove any other **Primary Driver** designations.

Search by Plate

> The **Search by Plate** option allows Administrators to locate vehicles, and view the user, vehicle details, and violations associated with a license plate.

Quick Steps:

1. Hover over **User Management** then **Vehicles**. Click on **Search by Plate**.
2. Enter search criteria (Plate, Make, Type, Colour). If you only have a partial plate enable **Fuzzy Search.** Optionally, set a **Date Range**.
3. Click **Search** to search for the vehicle.
4. To search only for **Electric Vehicles** you can enable the **Electric Vehicle** checkbox.
5. To view a vehicles history click on **History Icon** Image not found or type unknown on the far left. Click on the **Person Icon** to view the owner of the vehicles contact information.
6. To view the vehicle details click on the **Plate Icon** Image not found or type unknown which is located next to the **History Icon.**
7. To enter a new violation click the **Plus Icon** on the far right. Fill in the related fields then click **Record This Violation.** To add additional options, click the **Toggle More Options** button.
8. Click on a user's **Username** to edit their **Basic Profile Information.**
9. To email a user click on the **Email Icon** located next to their username.
10. To view violations and incidents click on the **Number Icon.** Violations will be to the left of the **Plus Icon** and Incidents to the right.
11. Temporary permit histories can be viewed under **Pay Station.**

Step-by-Step Instructions:

1. **Access the Search by Plate Menu:** Hover over **User Management** then **Vehicles**. Click on **Search by Plate**.
2. Enter search criteria (Plate, Make, Type, Colour). If you only have a partial plate enable **Fuzzy Search.** Optionally, set a **Date Range**. The system will search for vehicles matching partial data. **Example**: A partial plate of **APVK???**, color Grey, and type Hatchback. The system will show results like **APVK189** and a Pay Station record for **APVK123**.
3. **Search for a Vehicle:** Once you're in the **Search by Plate** screen, you can search using the following criteria:

- **Plate**: Enter the full or partial plate number (supports fuzzy search).
- **Make**: Search by vehicle make (e.g., Honda, Ford, Tesla).

- **Type**: Choose the vehicle type (e.g., hatchback, sports car, compact).
- **Colour**: Enter the vehicle's color (e.g., Red, Blue, Silver).

4. **Date Range**: Optional. This filters results based on Pay station parking and LPR events. Leave it blank to search the vehicle's entire history.

5. **Launch the Search:** Click the **Search** button to run the search.

6. **Review Search Results:** The results will show a list of users with matching plate information below the search box. Here's what you can do next:

- Click the **History Icon** to view the vehicle's history.
- Click the **Person Icon** located in the **History** to edit the user's profile.
- Click the **Vehicle Icon** to see more information about the vehicle associated with the plate.
- Click the **Plus Icon** to enter a new violation for this plate.
- Click the **Envelope Icon** to email the user.
- Click the **Number of Violations** to view/edit previous violations associated with the vehicle.
- Click the **Number of Incidents** to view/edit previous incidents related to the vehicle.

8. **Pay Station Parking Status**: Displays the user's temporary permit history if they bought a permit.

Merge Vehicles

> The **Merge Vehicles** option is used to combine two vehicles into one vehicle. It can also be used when a vehicle has outstanding violations and a User has added the vehicle (with violations) to their account.

> This will associate the vehicle to the User and bring along all the violation history to the User.

Quick Steps:

1. Hover over **User Management** then **Vehicles.** Click **Merge Vehicles**.
2. Enter the vehicle plate or VIN and click **Search**.
3. In the search results, select the secondary vehicle (left) and primary vehicle (right).
4. Click **Merge** and confirm the merge.
5. Wait for the confirmation screen to appear.

Step-by-Step Instructions:

1. Hover over the **User Management** icon and select **Vehicles**.
2. Click **Merge Vehicles**.
3. Enter the partial or full vehicle plate number or VIN of the two vehicles you want to merge.
4. Click the **Search** button.
5. Select the secondary vehicle(s) on the left (the one you want to merge into another).
6. Select the primary vehicle on the right (the one you want to merge into).
7. Click the **Merge** button.
8. Confirm that you want to merge the vehicles.

Duplicate Vehicles

> **Duplicate vehicles** in the OPS-COM system can cause quite a bit of confusion especially when there is more than 1 driver for the specific vehicle. This article will discuss how to avoid this issue.

In OPS-COM, vehicles are identified uniquely by three key pieces of information: **License Plate**, **Province / State**, and **Plate Type**. These three details are essential when entering a vehicle. For example, **ABC123** could appear as both a passenger vehicle plate and a commercial vehicle plate. Therefore, all three identifiers—**License Plate, Province/State, and Plate Type**—are needed to make the vehicle unique. However, duplicates can sometimes appear in the system if one of these details is entered incorrectly, leading to similar vehicles being mistakenly recorded as separate ones.

Some common reasons for duplicate vehicles include:

- **Mismatched vehicle information** creating duplicates in the system.
- **Incorrectly entered plate numbers** or manual entry errors.
- **Orphaned vehicles** that are not properly linked.
- **Orphaned violations** that should be associated with a specific vehicle.

> The more information you include when adding a vehicle to the system, the better. Providing more details will help the system recognize potential duplicates and avoid errors.

In addition to the three key identifiers, it is also recommended to include:

- **Vehicle Colour**
- **Vehicle Make**
- **Vehicle Model**
- **Vehicle Year**

These details help to clearly identify specific vehicles and ensure they are properly recorded in the system.

DNTT - Do Not Ticket or Tow

> The **DNTT** (Do Not Ticket or Tow) feature allows administrators to apply a condition on a vehicle that prevents officers from ticketing or towing it during a specified time frame.

This is helpful in various scenarios:

- **Example 1**: A photographer needs to park on campus while working over several days. By applying a **DNTT**, they won't receive tickets or be towed for parking in any area during their assignment.
- **Example 2**: The Dean of a School is attending a special event across campus. A **DNTT** ensures their vehicle can park outside their regular lot without penalties during the event. This is commonly referred to as the "Anti Embarrassment" feature.

Quick Steps:

1. Hover over **User Management** then click on **User Search.**
2. Search for a user then click on their **Username** to get to the **User Profile page.**
3. Click on the **Vehicles tab.**
4. Click **Add DNTT**.
5. Set **From Date** and **To Date**.
6. (Optional) Add a **Location**.
7. Add a **Note** (required) and **Save Changes.**
8. To modify or delete DNTT: Go back to the **Vehicles tab** and click **Edit DNTT**. Here you can either click on **Modify** or **Delete.**
9. To view **DNTT reports**: Hover over **User Management** then **Vehicles** and click **Vehicle DNTT Report**.
10. Enter **Date Range** and **Number of Instances**, then click **Search**.
11. Click **Username** for user details, **Plate** for vehicle info, and **# of Instances** for DNTT history.

Step-by-Step Instructions:

1. **Navigate User Search:** Hover over **User Management** then click on **User Search.**
2. **Search for a User:** Search for a user then click on their **Username** to get to their **User Profile Page.**
3. **Navigate to the Vehicle information page:** Click on the **Vehicle tab.**
4. **Select the Vehicle:** Click the **Add DNTT** link for the vehicle you want to apply the DNTT to.
5. **Select the Time Frame:** Set the **From** date and time, as well as the **To** date and time for the DNTT. You can also add a **Location** to specify where parking is allowed during the

DNTT period.

6. Add a **Note** (required) and **Save Changes.**
7. **Accessing DNTT Information from the User Profile:** Go back to the **Vehicles** tab in the user’s profile. Click **Edit DNTT** to view or manage DNTTs assigned to the vehicle. You can **Modify** or **Delete** the DNTT from this window.
8. **Accessing the DNTT Report:** Hover over **User Management** and then **Vehicles**. Click **Vehicle DNTT Report**.
9. **Searching for DNTT Records:** Enter the desired **date range** and the **Number of Instances**. Click the **Search** button to display relevant records.

> The **DNTT Report** is accessible to admins with the **Manage Vehicle** permission under system configuration.

> **How DNTTs Appear on Handheld Units:** Officers can view DNTT details when searching for vehicles using **Search Vehicles**. Tap on the specific vehicle in the list to see its DNTT details.

Forms Admin

The **Forms** options allow users to communicate with the organization about special requests.

Please note: The Forms module has been refactored, and has new functionality. New Forms are only operational on the OPS-COM app. Existing form data is not compatible with the new format, which means any old forms will need to be recreated in the new form format.

Quick Steps:

1. Hover over the **User Management icon** then **List Forms - New**.
2. On the **Forms** page you can view or edit existing forms or **+Add Form** to create a new form.

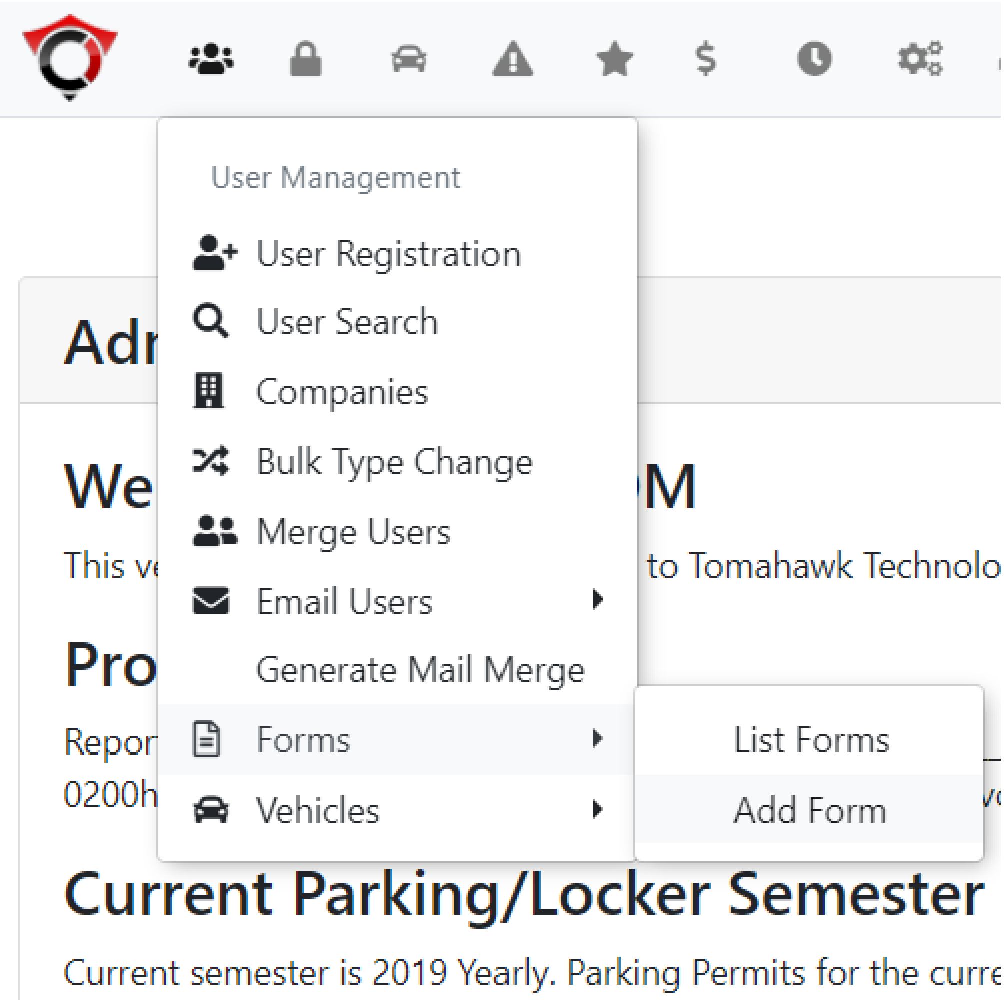
Make sure admins have **Edit Forms** and **View Forms** permissions enabled.

Step-by-Step Instructions:

1. **Hover over the User Management icon** then **List Forms - New**. This will show the new Forms module.
2. You will now have two options:
   - **Edit Form**: In the list of all the forms you have created, click the Edit icon.
   - **Add Form**: This allows you to create new forms for your users.

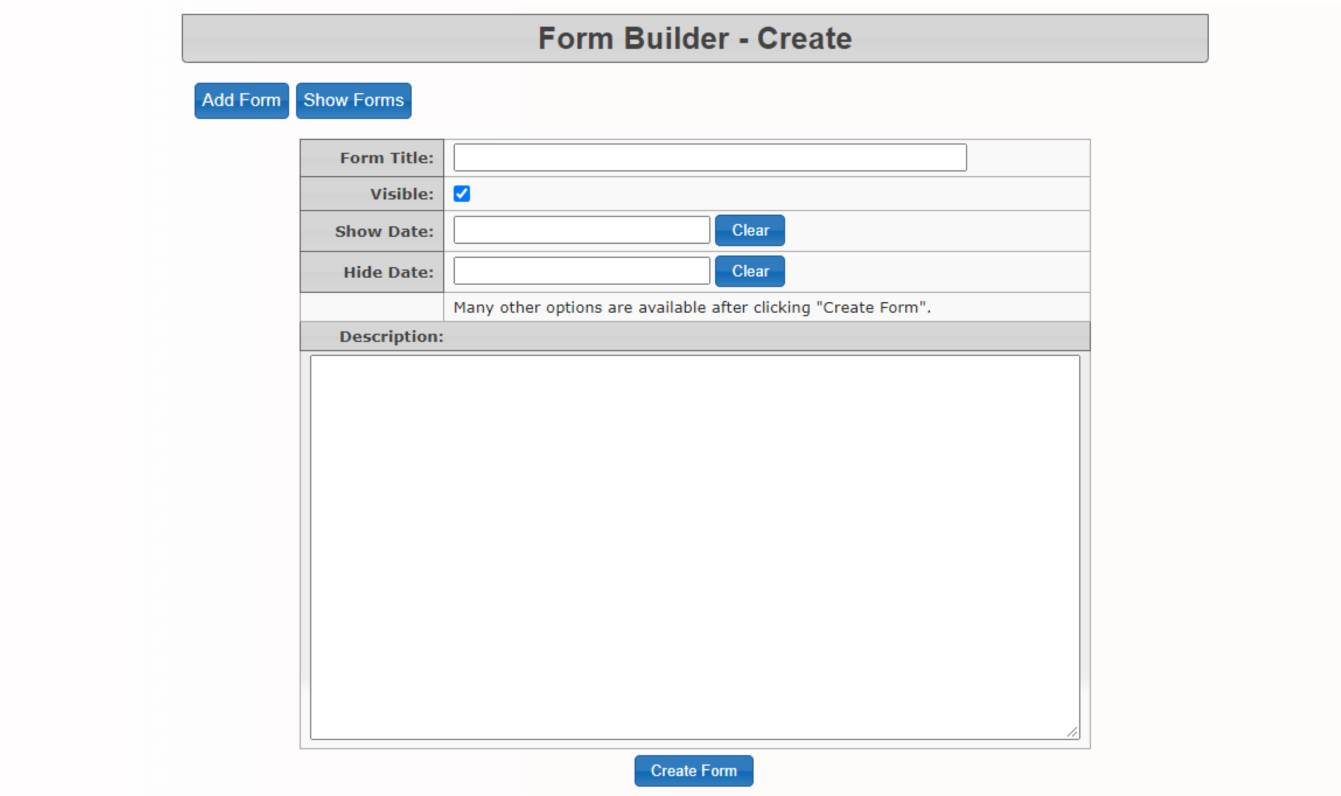
Adding Forms (old forms)

To add a form on your user side hover over **User Management** followed by **Forms** and click **Add Form.**



The **Form Builder - Create** screen will display, some options will be available after clicking **Create Form**.

- Enter the **Form Title**.
- Enable the checkbox if you want the form to be visible on the user side.
- Enter the dates that you want the new form to be visible/hidden to users. If you leave the dates blank the form will always appear on the user side.
- Enter a brief description of the form and click **Create Form** when finished.



After creating the form the **Form Builder - Edit** screen will appear with three additional tabs that must be completed. **Form Description, Post Form**, and **Questions**. You will also have the option to add an **External Form** field. Ensure you click **Update Form** after each tab is completed to save the form details.

Form Description

External Form

By supplying a URL in the External Form field, you can link to other forms created by third-party systems such as Survey Money. The URL must have https:// in front of it. EX: https://google.ca. Adding a URL such as www.google.ca will not work.

The **Form Description** tab is pre-filled with the information you submitted on the previous screen. Administrators have the ability to edit the details.

Post Form

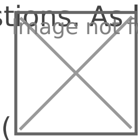
The **Post Form** tab is where administrators provide instruction for what happens after the form is completed/submitted by the user. Enable the appropriate checkboxes for the actions that should take place when a user submits the form. If you select the option to **Mail to specified email**, administrators must provide the *Email Subject*, an '*Email To*' address and '*Email From*' address. Enter the message text that you want to appear on the form completion page when a user submits their form.

Take Note

If you select the option to '**Show the form submission back to the user**', you must copy/paste the following token message into the Completion Text field:

- [%%FORM_RESULTS%%] - ARO user side (user paths end in .aro)
- {$FORM_RESULTS} - PHP user side (user paths end in .php)

Questions

The **Questions Tab** is the area where form questions are entered and the form database is built. Depending on the type of questions that are being asked, administrators will be asked to complete additional fields. Click the **Add** button to add additional questions. As labels/questions are added, they will appear at the top of the screen. The **Switch** image (

) to the left allows administrators to change the order of the labels/questions. The **Edit button** allows administrators to edit label/questions information.

- The **label field** is the question/name for the information that is being requested.
- The **type field** formats the question based on the type of data that you are requesting (e.g. text field, number field, radio buttons, checkboxes, etc.).
- The **Required checkbox** indicates the field must be completed by the user.
- The **Tooltip box** allows you to provide a field description for the information you are requesting which can be seen by users when they hover over the fields that need to be completed or for admins reviewing the forms.
  New in October 2016
  Users can now attach files to their form submissions.

Click the **Update Form** button to save changes.

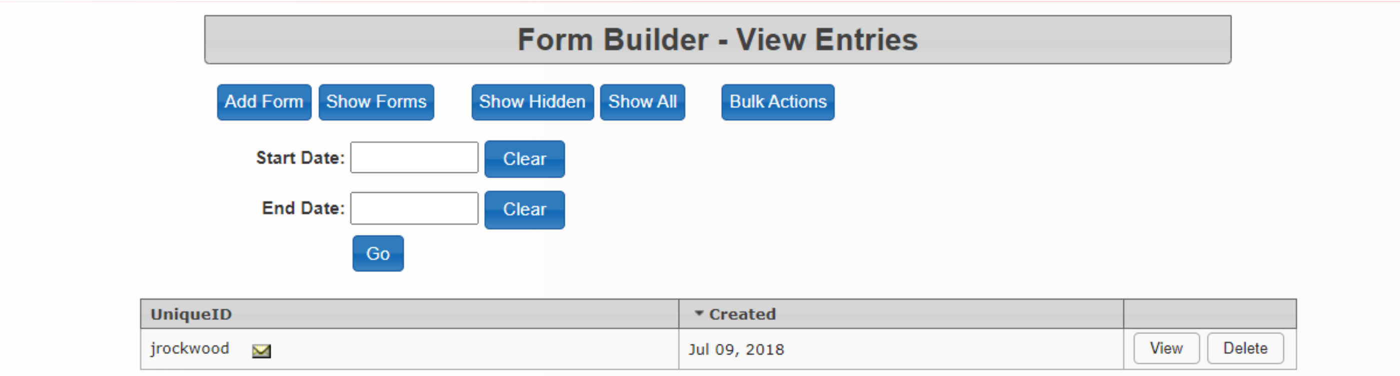
(TBD) A new tab for **Report Options** becomes available after you update the form. This tab allows administrators to specify how they want to show/hide the form data in their reports.

The *first section* allows administrators to specify which of the four fields they want to be able to display on the summary report to help you identify what form entry you want to view.

The *second section* allows administrators to specify which of the four fields they want to be able to hide on the summary report if it has a value. This is useful for hiding the forms that have been approved.

Take Note

Additional fields can be shown in a report by using the **Bulk Actions** button when viewing a form summary report in the List Forms (old forms) option.

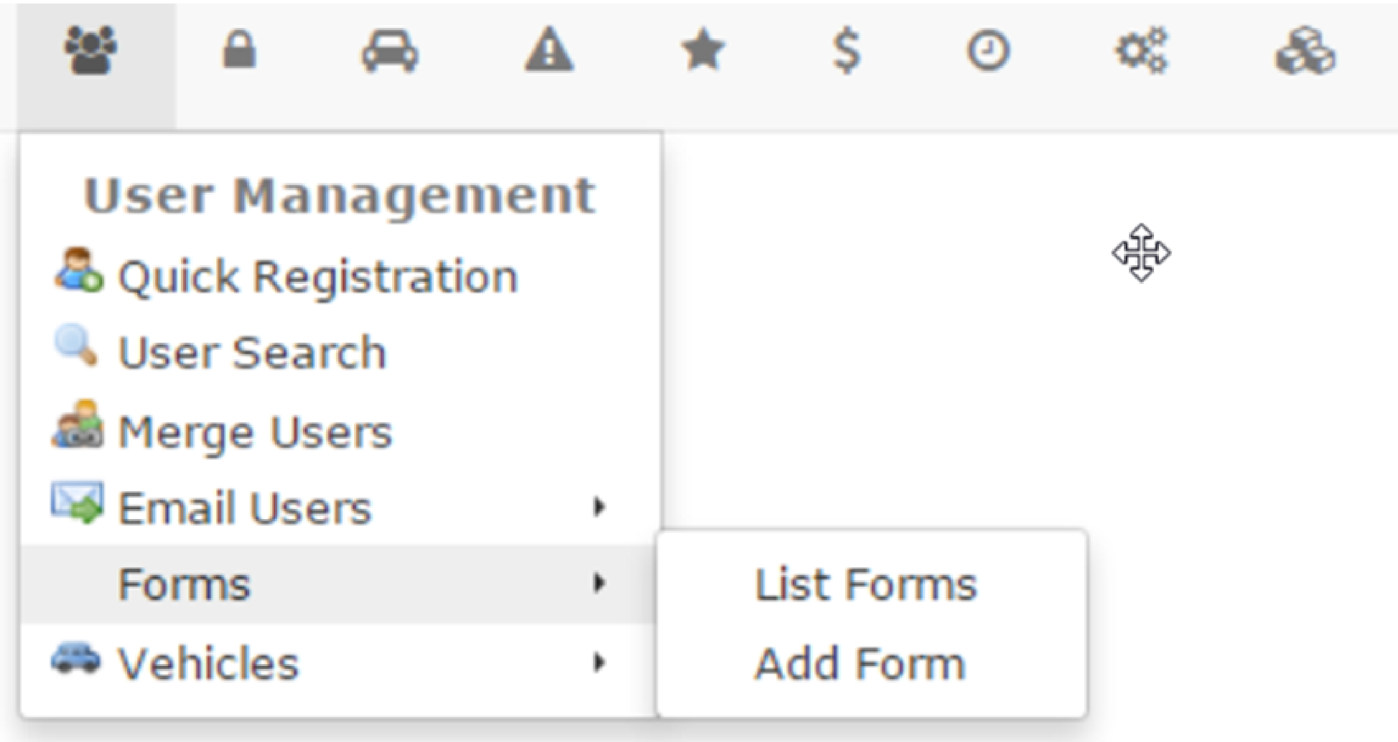


The form results are found under the Show Forms button or List Forms option in the User Management menu.

List Forms (old forms)

Getting to Forms

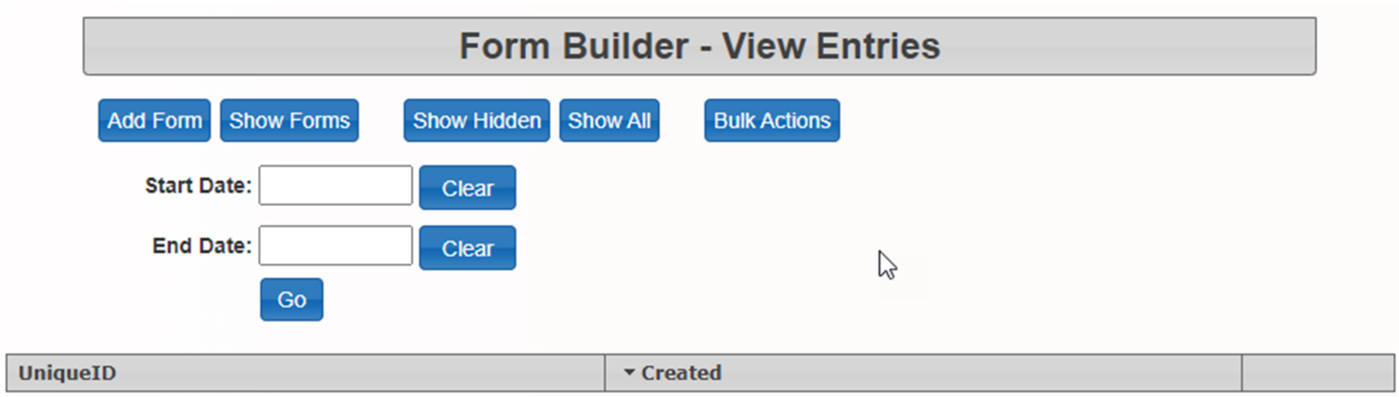
Hover over the **'User Management'** icon and then **'Forms'**. Click **'List Forms'.**



The '**Form Builde**r' screen is displayed. This table lists all the active forms that have been created.

- The **'Add Forms'** button displays the **'Form Builder - Create**' screen.
- The **'Show All Forms'** button shows both the active and archived forms.
- The **'Edit'** button will display the 'Form builder - Edit' page for the selected form. Administrators can view/edit the details of the form here.

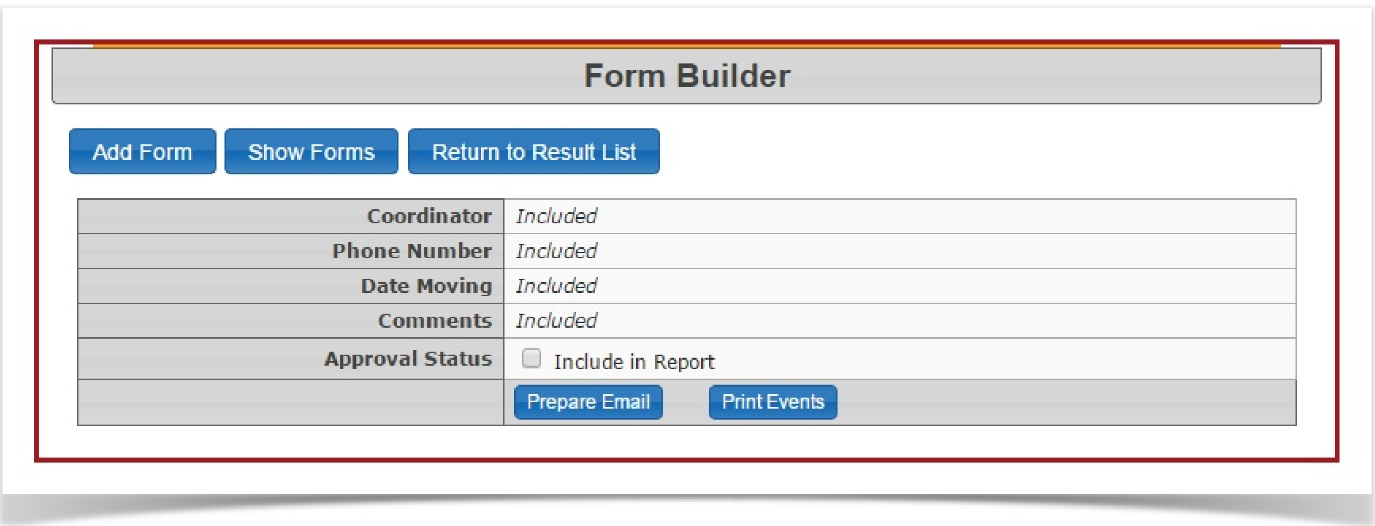
The '**View Entries'** button will display a table with the entries that have been submitted by users for the selected form.



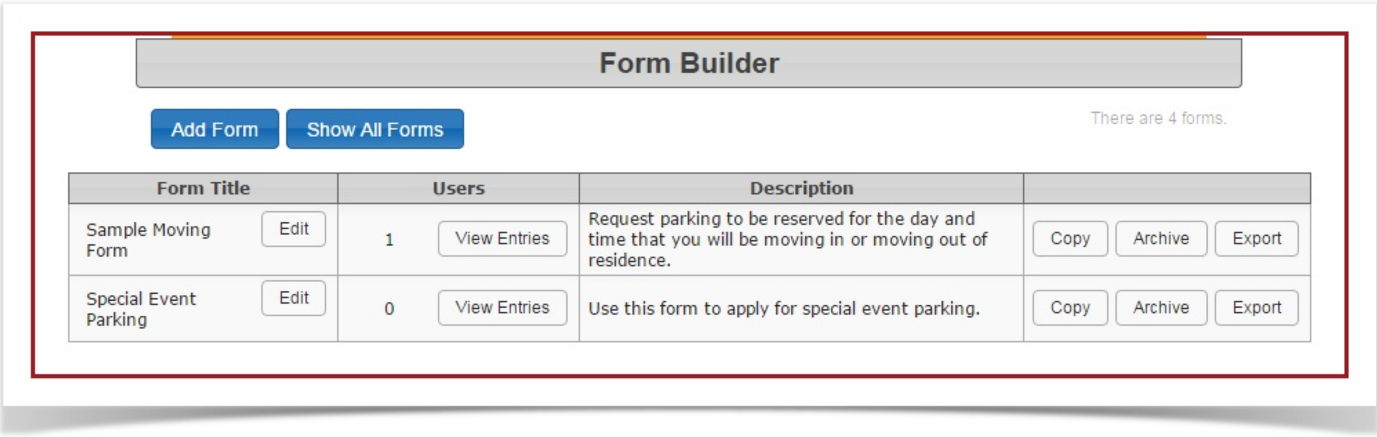
- The **'Show Hidden'** button will display any entries that have been hidden based on the criteria in the original form set-up under the **Report Options**.
- The **'Show All'** button displays both active and hidden entries associated with the selected form.
- The **Start Date** and **End Date** allows administrators to filter results based on date, select the **Go** button to update the results.
- The **envelope icon** allows administrators to email the user that submitted the form.
- The **Delete** button will delete the entry.

The **'View'** button allows administrators to view/edit all details submitted on the form by the user and also allows administrators to see the '**Administrator Only**' fields created in the form builder. You can click the **'Prepare Email'** button to send a message back to the user, or you can email the form details to someone else by entering their email address.

The **'Bulk Actions'** button allows administrators to create a report showing additional fields that are hidden in the summary report. It will also allow administrators to email the report on the selected form entries to specific administrators, and/or print the form entries.



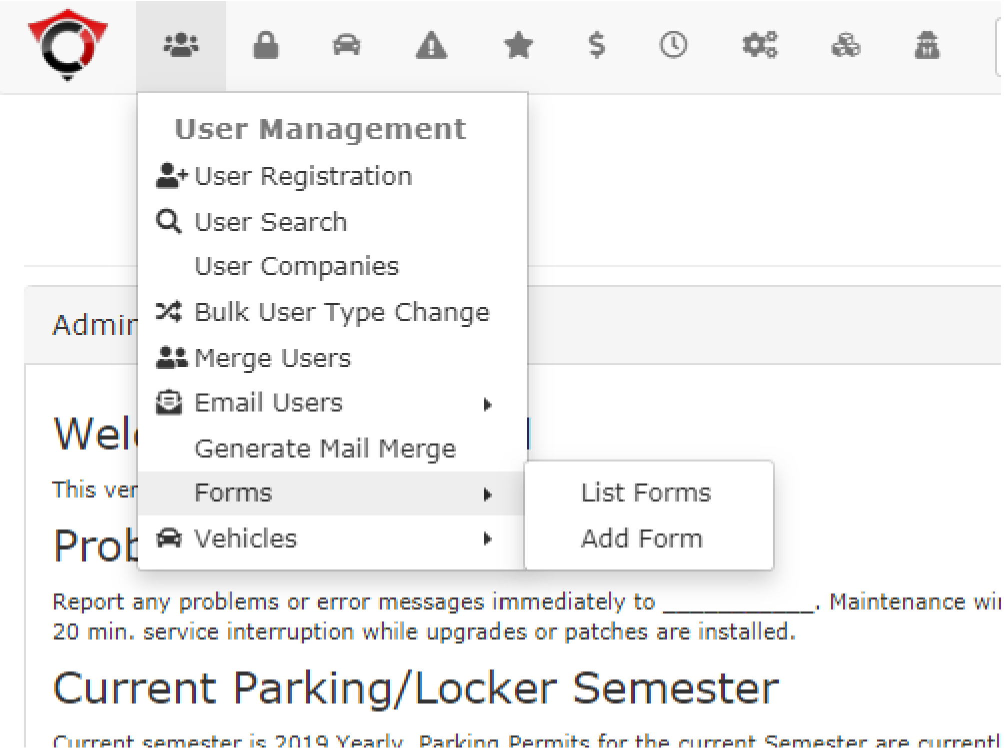
The '**Show Forms**' button displays the active forms.



- The **'Copy'** button allows administrators to duplicate a form. Administrators can then edit the form if needed.
- The **'Archive'** button allows administrators to hide a form from the listing of active forms. If administrators want to copy, restore, delete or export an archived form, click the '**Show All Forms**' button to display the listing of both active and archived forms.
- The **'Export'** button exports all form entries for a selected form into an Excel document.

The '**List Forms**' option allows administrators to view/edit all previously created forms. This is also where administrators go to obtain the form results.

Hover over the **'User Management'** icon and then **'Forms'**. Click **'List Forms'.**



The '**Form Builder**' screen is displayed. This table lists all the active forms that have been created.

- The '**Add Forms'** button displays the **'Form Builder - Create**' screen.
- The '**Show All Forms'** button shows both the active and archived forms.
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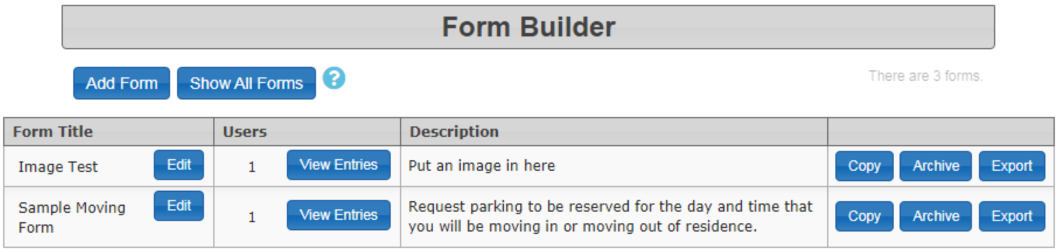

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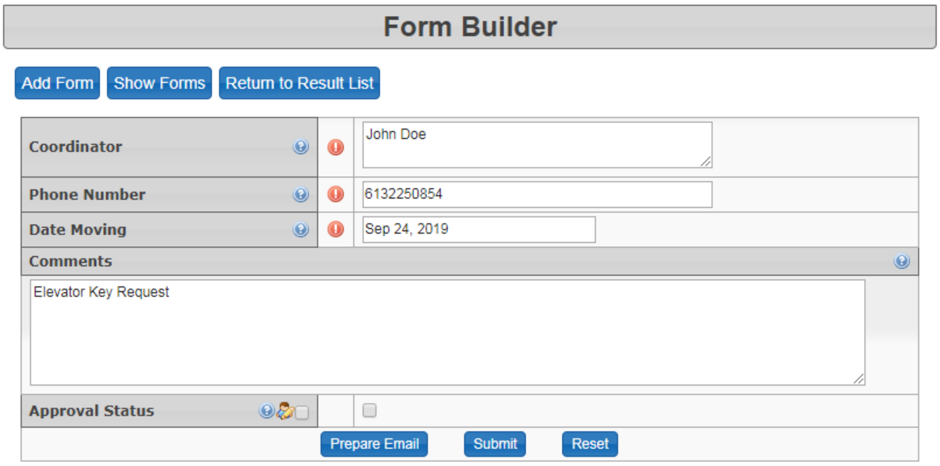
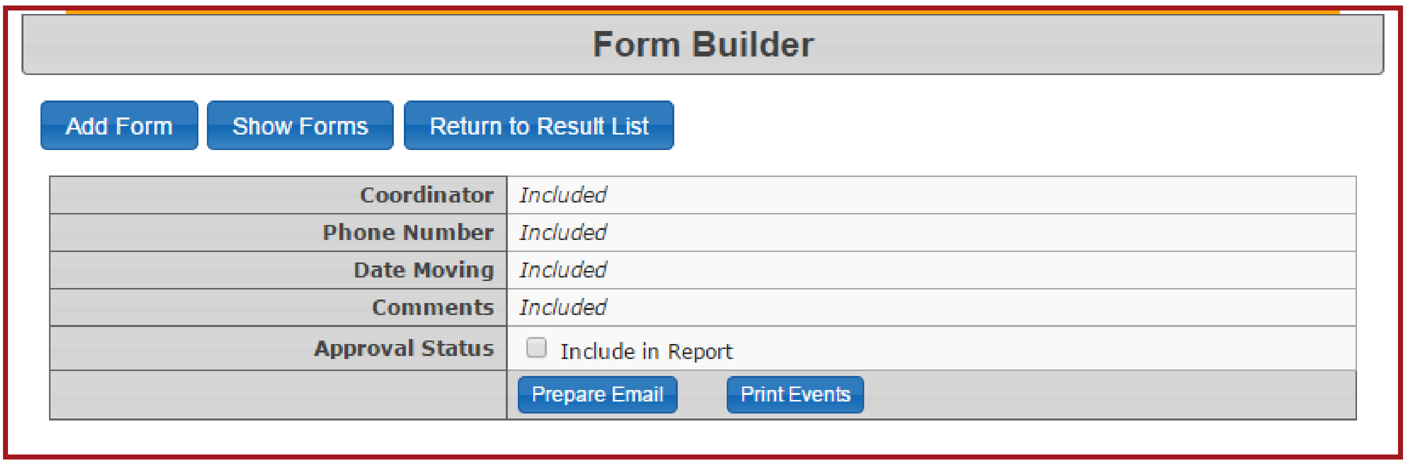
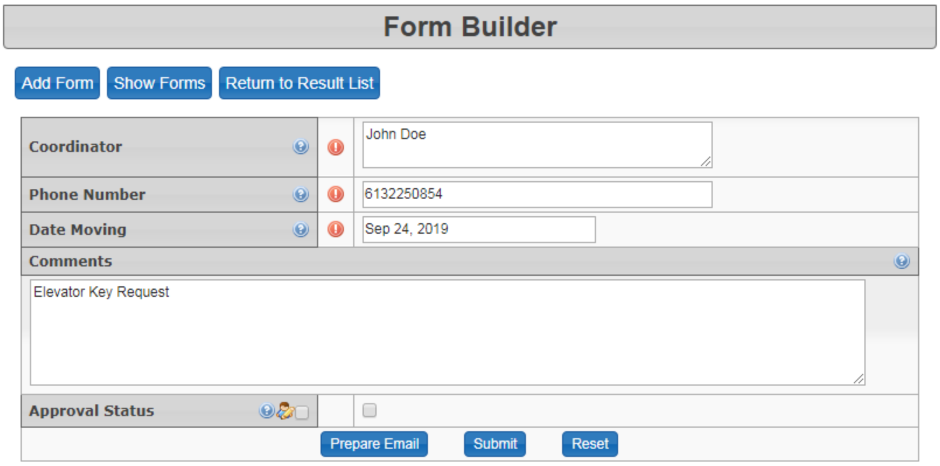


The **'Bulk Actions'** button allows administrators to create a report showing additional fields that are hidden in the summary report. It will also allow administrators to email the report on the selected form entries to specific administrators, and/or print the form entries.



'**Show Forms**' button displays the active forms.



- The **'Copy'** button allows administrators to duplicate a form. Administrators can then edit the form if needed.
- The **'Archive'** button allows administrators to hide a form from the listing of active forms. If administrators want to copy, restore, delete or export an archived form, click the '**Show All Forms**' button to display the listing of both active and archived forms.
- The **'Export'** button exports all form entries for a selected form into an Excel document.