

# Performing Permit Rollovers

## When to Rollover Permits

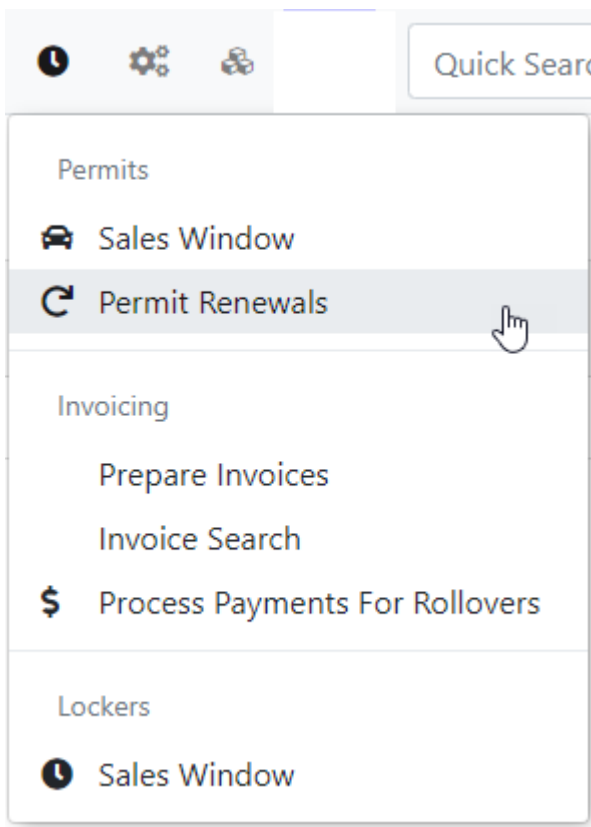
Patrons who pay by payroll deduction or through credit card purchases can also have their payments processed automatically as part of the rollover process.

Before attempting rollovers, please follow the steps in these wiki articles to ensure you have activated the correct Sales Window and that you have your information correctly set up for automatic payments.

Read [Sales Window Management](#) and [Credit Card Management](#) in OPS-COM

### Performing Permit Rollovers

To begin a rollover hover over **Permits** and click **Permit Renewals**. Click **Rollover Users** to launch the **Rollover Wizard utility**.



## Important

Before a rollover can be performed you must make sure that the new sales window you are rolling into has a start date that is equal to or greater than the end date of your previous sales window.

You may perform the steps outlined in the Sales Window Management and Credit Card Management in OPS-COM articles, to show you how you can set up sales windows before performing a rollover.

# Select Rollover Options

From the permit Renewal window select the current sales window you are rolling over **from** (From Sales Window) on the left side of the form.

**Permit Renewals**

From Sales Window

→

To Sales Window

Started - 2022 Yearly - Jan 01, 2022

Yearly

Ended - 2020 Annual - Dec 15, 2019

Ended - Yearly 2020 - Dec 17, 2019

Monthly

Started - Monthly October - Sep 26, 2022

November 2022 - Oct 24, 2022

Ended - Monthly - October 2020 - Sep 15, 2020

Ended - November Monthly - Nov 01, 2020

Ended - December Monthly - Nov 25, 2020

Ended - May 2022 - Apr 15, 2022

Other

Ended - Long Term Parking - Jul 01, 2020

Semester

Ended - Fall 2020 - Sept1-Dec31 - Aug 15, 2020

Show Lots

☒ Select Sale Windows

→

☐ Select Lots

→

☐ Process Renewals

Then select the Sales Window you wish to roll the permits into. In our example we are rolling permits from the October Sales Window to the November Sales Window.

At this point, we have the ability to select what user types we wish to roll over, or simply leave it as the default of **All User Types**.

## Permit Renewals

The screenshot displays the 'Permit Renewals' interface. At the top, there are two date range selectors: 'From Sales Window' and 'To Sales Window'. The 'From Sales Window' dropdown is set to 'Started - Monthly October - Sep 26, 2022'. The 'To Sales Window' dropdown is set to 'November 2022 - October 24, 2022' and is circled in red. Below these, there is a 'User Types' section with a list of user categories. The 'Public' category is expanded, showing sub-items: ADA User, New User, Public User, Resident 1, Resident 2, and VeritasComm. The 'Staff' category is also expanded, showing sub-items: Company Executive, Company Staff, and Contractor. A 'Show Lots' button is located below the user types list and is also circled in red. At the bottom, there is a navigation bar with three buttons: 'Select Sale Windows' (which is active, indicated by a dark circle), 'Select Lots', and 'Process Renewals'.

From Sales Window

Started - Monthly October - Sep 26, 2022

To Sales Window

November 2022 - October 24, 2022

User Types

- All User Types ---
- Public**
  - ADA User
  - New User
  - Public User
  - Resident 1
  - Resident 2
  - VeritasComm
- Staff**
  - Company Executive
  - Company Staff
  - Contractor

Show Lots

Select Sale Windows → Select Lots → Process Renewals

We also have the ability to select what user types we wish to roll over, or simply leave it as the default of **All User Types**.

Click on **Show Lots** to list all lots that can be rolled over in the selected Sales Window.

The list of lots will appear below the search form.

## Permit Renewals

From Sales Window

Started - Monthly October - Sep 26, 2022

→

To Sales Window

November 2022 - October 24, 2022

User Types

--- All User Types ---

**Public**  
ADA User  
New User  
Public User  
Resident 1  
Resident 2  
VeritasComm  
**Staff**  
Company Executive  
Company Staff  
Contractor

Show Lots

☐ Select Sale Windows

☒ Select Lots

☐ Process Renewals

Monthly Lot	<i> Holders</i>	<i> Renewing</i>	<i> Blocked</i>	<i> Renewed</i>	<i> Not Renewing</i>	<i> Not Renewing but Exists</i>
<input checked="" type="checkbox"/> Company Staff lot	5	3	0	0	2	0
<input checked="" type="checkbox"/> Moore Street (lot)	3	0	0	2	1	0
<input checked="" type="checkbox"/> The Bicycle Lot 1	1	0	0	0	1	0

### Permit Renewal / Rollover Changes

The next screen will renew all permits in the selected lots where possible. If there are permits that will not be renewed, please update the renewable state of each permit prior to this.

Clicking any of the buttons above to show the permits within that lot to make any changes needed.

 Export Users

Renew Permits

You may choose to include or excuse specific permits from the rollover. To see the list of permits that you can toggle for renewability click on either the **Holders** or the **Renewing** button.

From Sales Window

Started - Monthly October - Sep 26, 2022

To Sales Window

November 2022 - October 24, 2022

User Types

--- All User Types ---

**Public**  
ADA User  
New User  
Public User  
Resident 1  
Resident 2  
VeritasComm  
**Staff**  
Company Executive  
Company Staff  
Contractor

Show Lots

Select Sale Windows

Select Lots

Process Renewals

Monthly Lot	Holders	Renewing	Blocked	Renewed	Not Renewing	Not Renewing but Exists
✓ Company Staff lot	5	5	0	0	0	0
✓ Moore Street (lot)	3		0	2	1	0
✓ The Bicycle Lot 1	1	0	0	0	1	0

A list of permits in this lot will appear where you can toggle whether you wish to have permits renewable or not. In our example below permits STAFF1000 and STAFF1001 are not renewing and therefore should not roll over.

Be sure to click **Update Permits** to save your changes.

Search

Total Permits: 5

Requested: 0

Rented/Reserved: 5

Visible To User: 0

Visible To Admins: 0

Unavailable: 0

Email Listed

Mailing List

Status Report

Copy

CSV

Excel

PDF

Print

Show 100 entries

Search:

#	Lot	Cost	Availability	Renewability	User Type	Usage State	State
STAFF1000	CSL [M] Company Staff lot	\$30.00	✓ Available	<input type="checkbox"/> Renewable	Company Staff	Rented Release Switch	Good
STAFF1001	CSL [M] Company Staff lot	\$30.00	✓ Available	<input type="checkbox"/> Renewable	Company Staff	Rented Release Switch	Good
STAFF1002	CSL [M] Company Staff lot	\$30.00	✓ Available	✓ Renewable	Company Staff	Rented Release Switch	Good
STAFF1003	CSL [M] Company Staff lot	\$30.00	✓ Available	✓ Renewable	Company Staff	Rented Release Switch	Good
STAFF1004	CSL [M] Company Staff lot	\$30.00	✓ Available	✓ Renewable	Company Staff	Rented Release Switch	Good

Showing 1 to 5 of 5 entries

Previous
1
Next

Update Permits

Reset Page

Here's the logic used for each column:

State	Current Permit Renewing (prevent rollover = 0)	User exists in target Sale Window	Permit exists in target Sale Window	Notes
Renewing	True	False	False	Neither the user, nor the permit exists, but the current permit is set to be renewed.
Blocked	True	False	True	The permit exists in the target sale window, but the user doesn't. This means anywhere for any permit in the lot. If the user has multiple permits and some of them renewed, then they technically are not blocked. If the user has been given a different permit, they also are not blocked.
Renewed	True	True	N/A	The user is considered renewed when they exist in the target sale window. Just like the note for blocked, it's not intended to be good for users with multiple permits.
Not Renewing	False	False	N/A	The user was not found in the target sale window and their permit is also not renewing. This is the expected scenario.
Not Renewing, but Exists	False	True	N/A	The user WAS found and their permit is not renewing. This could use some investigation to make sure that the user is supposed to have that permit or not.

Once you have completed this process for all lots you wish to include in the rollover process click on **Renew Permits** to continue.

Show Lots

Select Sale Windows

Select Lots

Process Renewals

Monthly Lot	<i>?</i> Holders	<i>?</i> Renewing	<i>?</i> Blocked	<i>?</i> Renewed	<i>?</i> Not Renewing	<i>?</i> Not Renewing but Exists
<input checked="" type="checkbox"/> Company Staff lot	<input type="text" value="5"/>	<input type="text" value="3"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="2"/>	<input type="text" value="0"/>
<input checked="" type="checkbox"/> Moore Street (lot)	<input type="text" value="3"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="2"/>	<input type="text" value="1"/>	<input type="text" value="0"/>
<input checked="" type="checkbox"/> The Bicycle Lot 1	<input type="text" value="1"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="1"/>	<input type="text" value="0"/>

### Permit Renewal / Rollover Changes

The next screen will renew all permits in the selected lots where possible. If there are permits that will not be renewed, please update the renewable state of each permit prior to this.

Clicking any of the buttons above to show the permits within that lot to make any changes needed.

Export Users

Renew Permits

The screen will refresh and update the permit counts. As in our example here you can see in the Company Staff Lot the 3 permits we left toggled on for rollover have indeed rolled over and the 2 permits we toggled as not renewing remain in the **Not Renewed** column. These two permits will now be available to be purchased by new users once your sales window for November is active.

Show Lots

Select Sale Windows

Select Lots

Process Renewals

Monthly Lot	<i>?</i> Holders	<i>?</i> Renewing	<i>?</i> Blocked	<i>?</i> Renewed	<i>?</i> Not Renewing	<i>?</i> Not Renewing but Exists
<input checked="" type="checkbox"/> Company Staff lot	<input type="text" value="5"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="3"/>	<input type="text" value="2"/>	<input type="text" value="0"/>
<input checked="" type="checkbox"/> Moore Street (lot)	<input type="text" value="3"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="2"/>	<input type="text" value="1"/>	<input type="text" value="0"/>
<input checked="" type="checkbox"/> The Bicycle Lot 1	<input type="text" value="1"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="1"/>	<input type="text" value="0"/>

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Export Users

Renew Permits

# Permit Processing

It is important to note how the permits can be processed after or during the rollover process. The system is set up to automatically roll over permits that have been paid through **gateway payment** types such as **Mastercard, Visa. Payroll Deduction** etc.

In this example, Users will be rolled over but will need to make a payment in order to secure their Permit. However, if the user has a payment subscription setup they will be rolled over and the payment will be processed automatically.

Note that the **Process Payment** will be automatically toggled on (will be processed) as well as the **Credit Card Type** appears in the button for users that can be processed automatically. If for any reason, the person is not continuing to park in a given lot, simply exclude them from the rollover by unchecking the corresponding checkbox under **Rollover**.

1. Click **Rollover Permits** to complete the process.
2. You will need subscriptions set up for payroll deductions, EFT or credit card payments.

You can prevent permits from rolling over by setting the renewable flag on the permit.

## Exporting Users to Rollover

After clicking the **Rollover Permits** we can also choose to export an excel spreadsheet of all the users that are associated with the lot we have selected. To do this we click **Export Users** on the **Permit Rollover** page.



## Permit Rollover

From **Yearly 2019** → To **Yearly 2020**

This is for rolling active permits from the current active sales window to the selected future sales window.

User Type(s)


--- All User Types ---

Active Sales Window Type

Yearly

Lot to roll over

After 4PM



Confirm Rollover

This will open a new window that generates the excel document for us to open depending on the browser you are using. You may be warned that the file is corrupt in some way however you should still be able to view the output in Excel's protective view.

## Related Video

<https://www.youtube.com/embed/R02qrItP3RM?wmode=opaque>

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