New Client Onboarding

Enterprise Onboarding Schedule

Phase 1 (*estimate: 2 weeks*)

After we receive your signed contract, we’ll kick off your project with a Google Meet to get a deeper understanding of your specific needs and requirements. We encourage you to invite other relevant team members to this discovery call to help us clarify your expectations and ensure a smooth, delightful deployment.

In this phase, we will cover some key areas, including:

- Assembling our team
- Responsibilities of the OPSCOM team during Rollout
- Your responsibilities during the rollout
- Introduction to OPSCOM support
- Overview of your business processes

Your site will be setup and login credentials will be sent automatically by email.

Billing occurs immediately upon site creation. All clients are given terms of n30.

Phase 2 (*estimate: 2 weeks*)

Once the initial preparations are complete, we’ll move to Phase 2 to assemble the standard components of your installation. This includes the technical and financial requirements, as well as implementing your hosted payment solution. The New Client Orientation and Rollout wiki, along with your Trainer and

Account Executive, will continue to guide you through all the tasks in this phase. Other areas of coverage include:

- Admin and Client Domains
- Determining Access to OPSCOM
- Determining your Roles and Permissions
- Creating Administrator Accounts

Phase 3 (*estimate: 3-4 weeks*)

Phase 3 is where we focus on the truly tailored aspects of your installation. This is the stage where any custom development work or data imports are managed. This is also when we would look at integrations with any external data suppliers. You will also be introduced to the self-guided training agenda so you can start playing with your preview system and understanding how things work. Your Account Executive and/or Trainer will be working with you and your team to set up:

- All configuration and admin options
- Lots and Permit options
- Violation Options
- System messaging for the User Portal
- User Portal Template and Design
- Your Email Templates
- Order your violations stock

Phase 4 (*estimate: 2-3 weeks*)

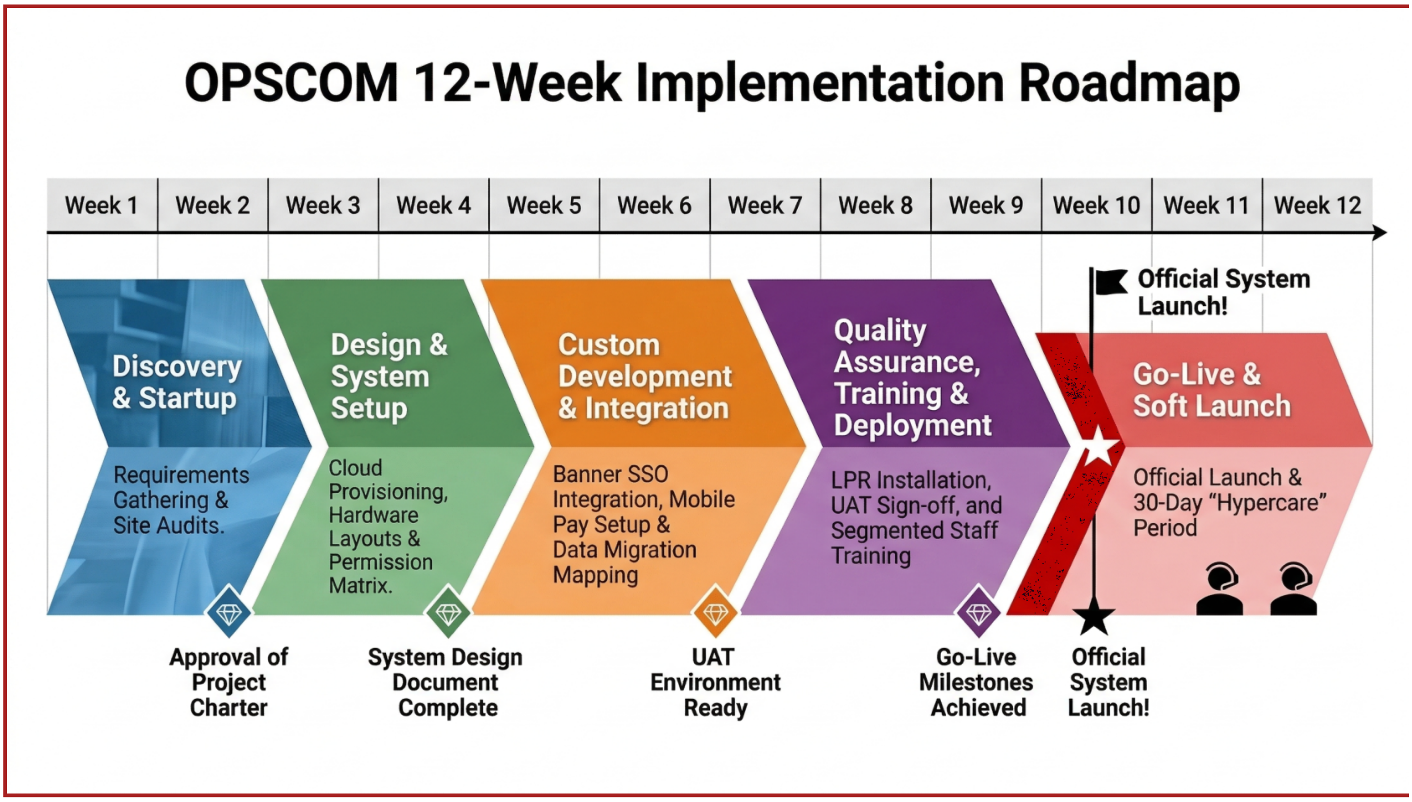
Phase 4 is the final testing phase of the project, designed to be as seamless as possible. Staff on both sides will work together to go through the various functionalities of the installation. This is a chance to learn the specific operations and identify any potential bugs or process needs before you go live.

Your Training representative will be working with you during this time to ensure you feel completely comfortable with the system and how to use it. They will schedule live training sessions with you and your team at your convenience to work through the various modules in the system.

Phase 5 (*estimate: 1 day*)

Phase 5 is the final, exciting step of the project. Once all tasks have been completed, custom requirements fulfilled, and you feel confident with the system, your live site will be launched for public use!

This is what a 12 Week Enterprise Onboarding schedule looks like.



Starting your Enterprise Onboarding

> A delightful and seamless deployment is a team effort. To ensure the system meets all your unique needs and covers all your business processes, your organization and the OperationsCommander team will bring together key players. We believe this collaborative approach ensures a successful launch.

Team Accountability

Responsibilities of the OPSCOM Team During Rollout

- **Overall Project Manager:** Once your contract is signed, we’ll assign you a Project Manager from the OperationsCommander team. Their job is to manage the technical deployment of our solution, coordinate training, assist with setup, and ensure all custom pieces are developed just as you imagined.
- **Setup and Configuration Specialist:** We will also provide a Setup and Configuration Specialist to help you reimagine your current business processes. They will advise you on the best practices for system setup and share inventive solutions that have helped other clients. To ensure we can tailor the system to your needs, you will receive a document with a series of questions about your business, which must be completed before we begin the setup and configuration process.
- **Trainer and Support Liaison:** If included with your installation, a Trainer will be responsible for showing you how the system works and answering your questions. They will also introduce you to the support

processes that will be available to you after you go live.

Client Responsibilities During Rollout

Every new client must have a Project Manager from their organization. This person should understand your business processes and be familiar with your implementation goals. This role is often filled by the Parking Manager. This person will assemble the rest of the team, which should include the following contacts:

- IT Contact: The person in charge of SSO or other system integrations.
- Hardware Contact: The person in charge of handhelds, printers, and cameras, if applicable.
- Financial Contact: The person in charge of gathering hosted payment details.

We are flexible and adaptable to your needs. If you cannot provide a project manager, one will be provided by the OperationsCommander team for a fee. The project managers will work together to create a plan that covers every aspect of your deployment. Your Project Manager should have time to dedicate to the rollout and must attend the Project Kickoff, training and setup sessions.

Setup of Customer Account & Billing

After your contract is signed, you will be set up in our billing system, and you'll receive a warm client welcome email with your account details. To make this process seamless, we will need the following information from you:

- Accounts Payable contact with an email address and telephone number
- Main Project Contact, with their address, email, and telephone number

- Names and email addresses for the IT Contact, Hardware Contact, and Financial Contact
- Purchase Order number, if available

Communication of Security Information

We understand the importance of security. Your IT organization may have questions about how we handle data, secure our system, and ensure data safety. We are here to help. Please feel free to share the OperationsCommander Security White Paper with anyone who requires it. If you require more details, please reach out to support@ops-com.com and they will arrange for our security specialist to get in touch.

Utilizing OPSCOM Support

Our support is designed to be set you up for success! You will be directed to email many things directly to support@ops-com.com over the course of your roll out. Don't hesitate to reach out!

Phase 1 - Learning the Basics

> Welcome to OperationsCommander! We are delighted to have you on board as you begin your journey toward seamless parking management. We believe in making every step a delight, and these first steps are designed to be intuitive and efficient. Please click on any of the titles below to discover more information and proceed with your setup.

Admin and Client Domains

Your OperationsCommander platform is made up of two parts: the Admin Portal and the User Portal. After setup, you can access your OperationsCommander Admin console at `yourdomain.OPSCOM.com/admin`. Your clients, or end-users, can access their portal at `yourdomain.OPSCOM.com/u`. This client-facing site can be tailored to fit your brand with your company logo and colors, ensuring a seamless experience for your users.

You will need to reference the URL for the User Portal on any communications you have with your clients. This site can be branded as yours with your company logo and colors. The design of the system is up to you and the expertise of your staff.

First Time Login

You should have received an email with your login credentials. The account for BigPark has already been configured for the highest level of access. This account should be reserved for high-level administrators only.

[Learn Dash Training Materials]

Upon your first login, you'll be greeted by your Admin Dashboard. Here, you'll find all the training courses and a helpful Setup Checklist to guide you. The checklist will ensure all important settings are in place before you continue with your setup, allowing you to focus on what matters most.

Preview & Production Sites

OperationsCommander is designed with flexibility in mind, offering Preview Spaces that provide a secure, isolated testing environment. These spaces mirror your live production system's data, allowing you to test new features, stage changes, or conduct training without impacting your operational system. This is your safe sandbox for development and learning. Click on the title to learn more.

Determining Access to OPSCOM

Determining your Roles and Permissions

We understand the need for a flexible, tailored system. OperationsCommander allows System Owners and Administrators to set up roles that restrict access to information and features. Roles are a group of permissions that are bundled and assigned to a set of users. For example, you can create a role for a Patrol Officer, define the permissions, and assign admins to that role. Admins can have multiple roles, allowing you to create solutions that fit your unique needs seamlessly.

Creating Administrator Accounts

The initial system setup includes a single administrator account, with login details provided by the OperationsCommander team. To get your other admins into the system, you can simply follow the steps in the article linked in the title of this paragraph.

Setting up a Landing Pages and Dashboards for your Administrators

When you sign in to OperationsCommander, the first thing you see is your Admin Dashboard. This landing page can be edited to display important information to your team. We recommend using it to direct your admins to training and support information as you get started. Once you go live, you can use this space for:

- Pricing Information
- Contact Information
- Scheduling Information
- Organizational Information
- Legal Notices
- General Information

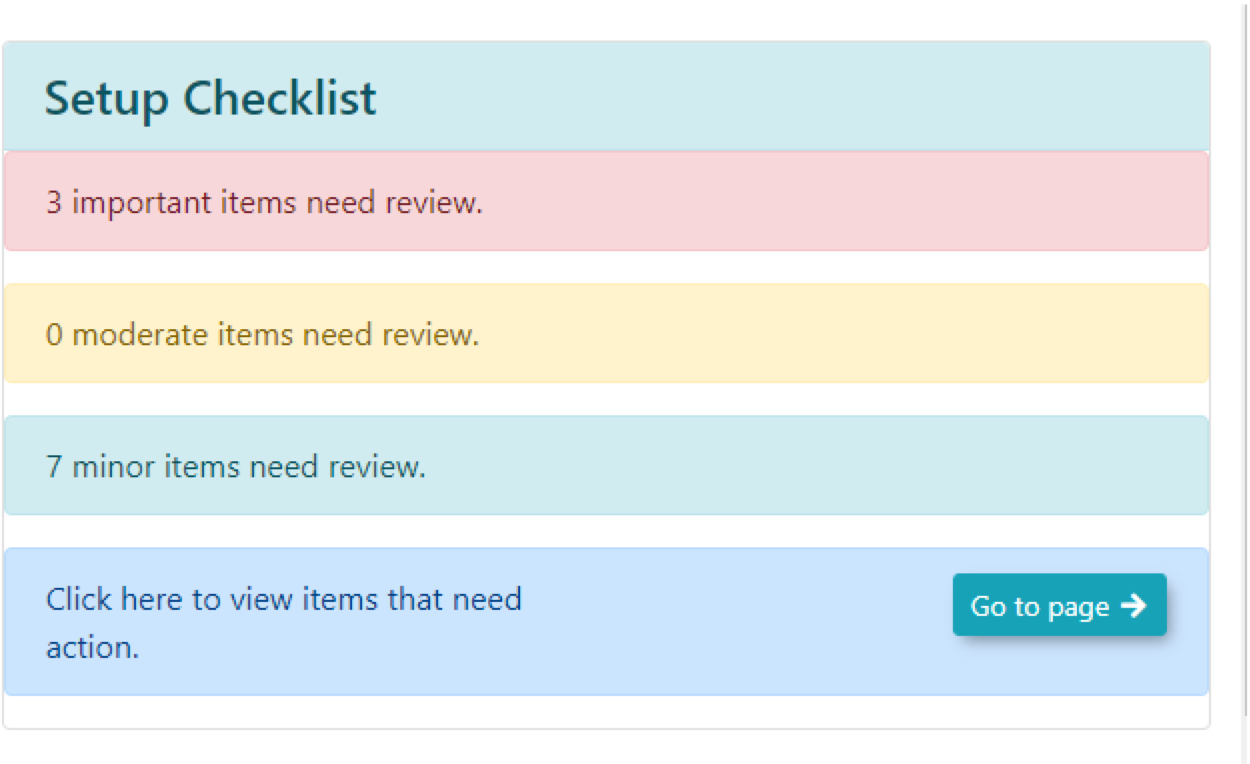
OPSCOM Wiki and Training

Our parking and security wiki is a growing wealth of information about using our software and applying best practices in a busy security office. To assist with your transition to an improved operational model and to see how parking management can be made easy and delightful, we have organized this wiki into Training Modules that users can go through at their own pace.

Setup Checklist

New to OPSCOM and you need a little guidance as to what messaging needs your attention? This article explains the items to look at in order of importance.

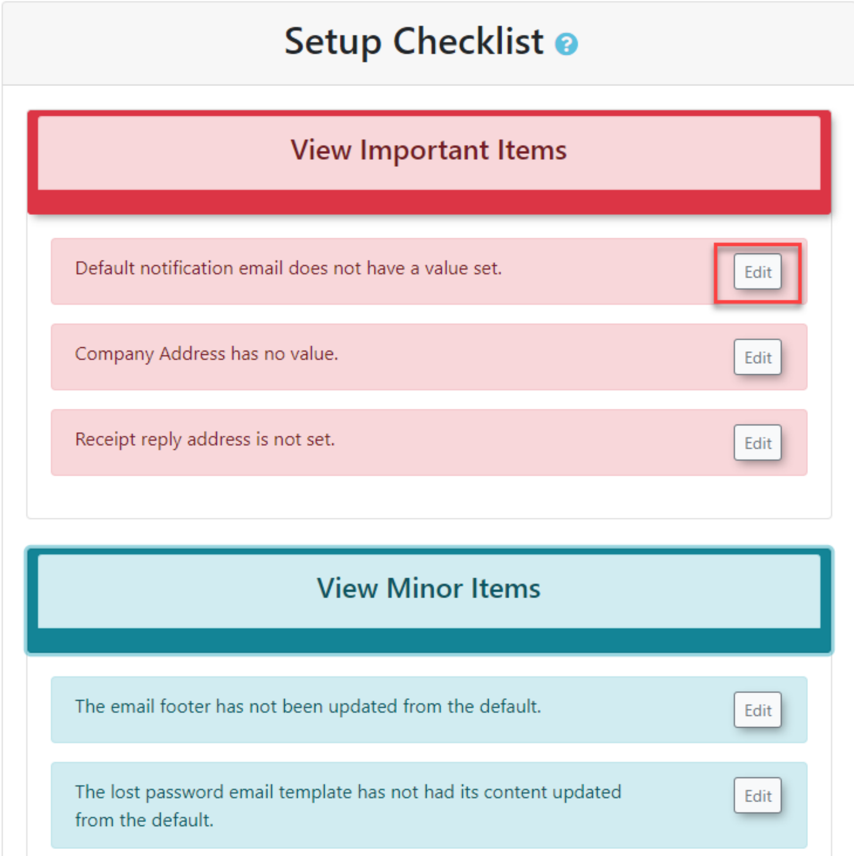
The Setup Checklist



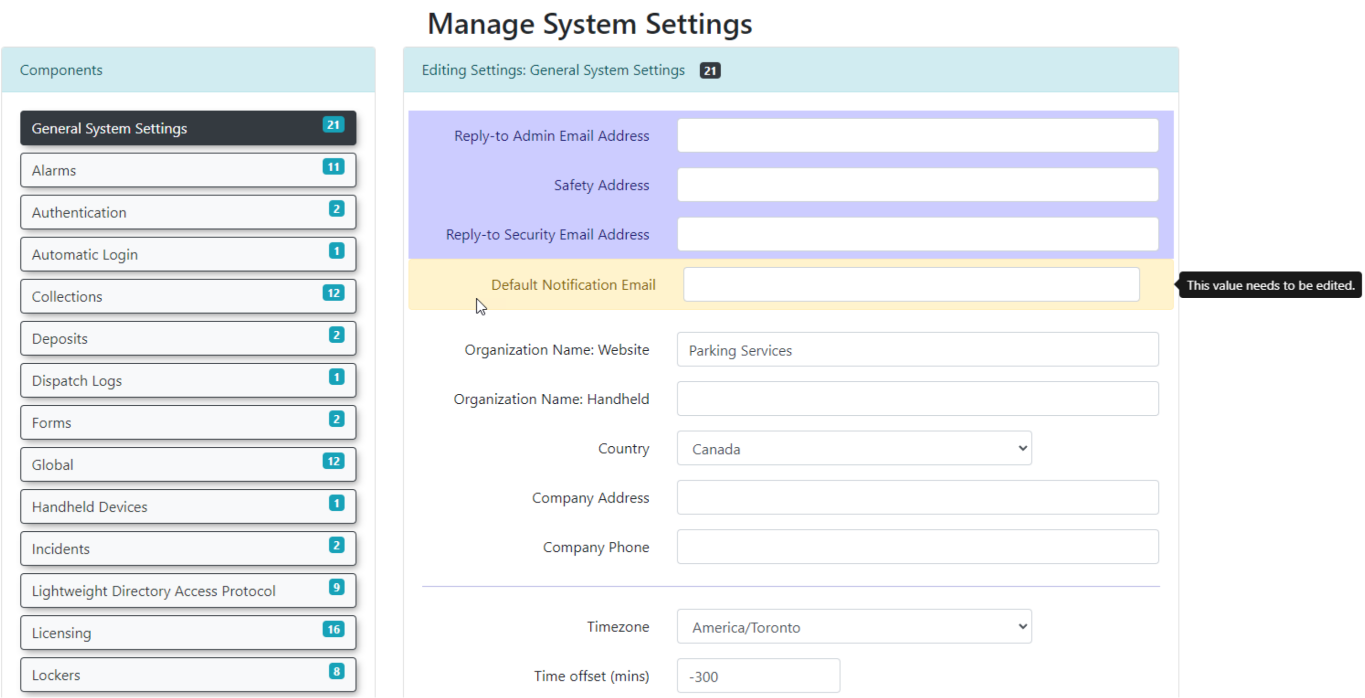
The setup checklist guides new users through the important process of setting up a new site. It breaks down the items that need attention in three categories (Important, Moderate and Minor) The checklist can be expanded to list all configuration and page updates that a new user should consider.

The Edit Button

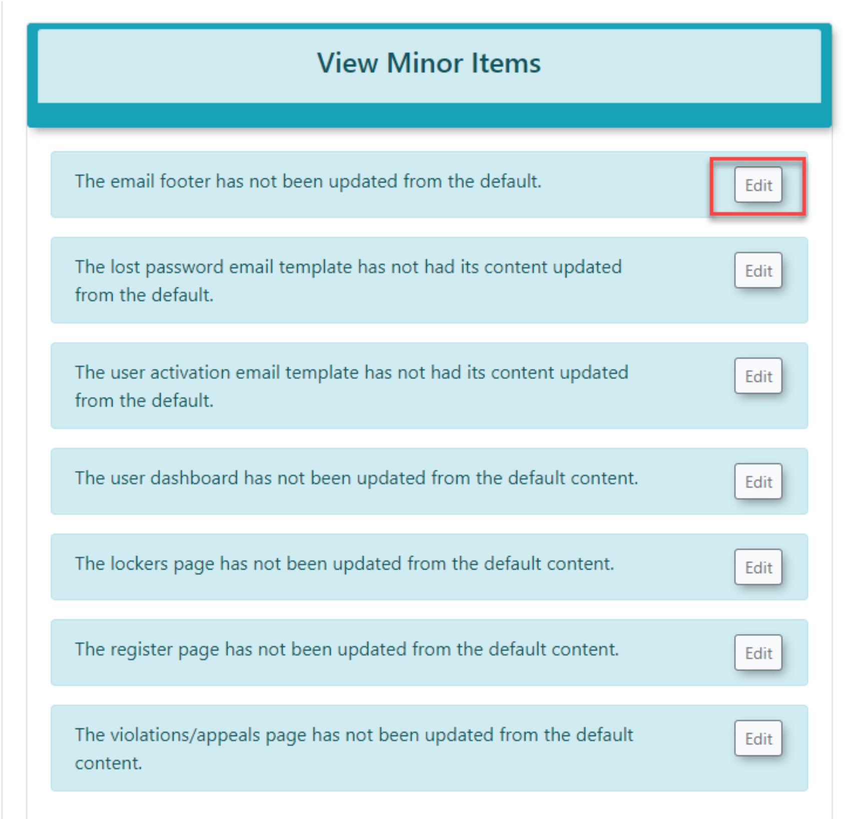
Click on the Each Section to Expand the List. Clicking on the edit button...



...will bring the admin directly to the item that needs attention.



The same principal exists for system messaging. The edit button will take the admin to the page that needs updating.


View Minor Items
The email footer has not been updated from the default.
Edit
The lost password email template has not had its content updated from the default.
Edit
The user activation email template has not had its content updated from the default.
Edit
The user dashboard has not been updated from the default content.
Edit
The lockers page has not been updated from the default content.
Edit
The register page has not been updated from the default content.
Edit
The violations/appeals page has not been updated from the default content.
Edit

Phase 2 - Payment Provider Setup

Standard Hosted Payment Providers

Using **Hosted Payments** is the most delightful and secure way to handle most of your payments in the OperationsCommander system. With Hosted Payments, the payment processor takes on the responsibility of handling payment details directly, and then it provides the final result to you. This gives you an additional layer of security, as credit card information is never presented to any system other than the payment processor itself. This also simplifies data communication, since only the transaction result is sent to OperationsCommander.

For our Standard clients, we have seamlessly integrated hosted solutions for the following payment providers:

- Bambora Checkout
- EdgeExpress
- Moneris Checkout

Please contact your Account Executive to start the process of getting an account with these providers. Once you're all set up, you can follow the steps in the wiki article to get the payment type configured.

Taking Payments

Managing Payment Types

We understand that every organization has unique needs. The **Managing Payment Types** section provides you with the flexibility to control which payment methods are available throughout the system. This comprehensive control allows you to define new payment options, assign them to specific user types (like Staff, Students, or the Public), and configure their usage for subscriptions or guest payments. This ensures your transactions are streamlined and always aligned with your organization's financial policies.

Setting up QuickPay/Guest Payments

Guest Payments are designed to make life easier for your users. They allow people to quickly look up and appeal or pay their ticket without the hassle of creating an account or logging in.

To start taking payments, you'll need to proceed with **Phase 3 Config & Admin Options**.

Phase 3 - Config and Admin Options

> It's time to unlock the power of OperationsCommander and get this system configured! This is where you'll get to use your ingenuity to set up your users, lots, and templates. Then, you'll be ready to run a “Penny Test” and accept your first payment.

Setup & Configuration Instructions

The wiki contains a whole section dedicated to setup and configuration. This will go into even more detail than what we have outlined below, so feel free to explore and discover what the platform can do for you.

User Types

User Types are a flexible way to categorize your users (e.g., Student, Staff, Public) and control how they interact with the system. For example, you can set rules to allow staff to park in different lots than visitors. This feature allows you to ensure appropriate permissions and functionalities for each user group, creating a truly tailored experience for your users.

User Profile Settings

With **User Profile Settings**, you can customize the information you collect from users on their profile forms. By adjusting the visibility and requirement status of various fields, you can tailor the user experience and make sure you get all the information you need in a way that is simple and intuitive.

Vehicle Configuration

You will also need to set up the vehicle description information you want to track. We make this simple and efficient so you can get up and running quickly.

System Settings Customization

System Settings provide administrators with comprehensive control over the core functionalities and behaviors of the system. This centralized area allows for fine-tuning various components, from general system parameters and security protocols to specific module functionalities like parking, violations, and payments. This ensures your system operates according to your unique needs, showcasing the flexibility of our platform.

Setting up the Look and Feel of the User Portal

OperationsCommander administrators can define global default branding for the User Portal. By configuring the **Default Site Logo** and **Default Site Header**, you can ensure consistent branding and visual presentation across your user environment, making the experience comfortable for your users.

Email Template Setup

Email Templates allow administrators to customize the content and appearance of automated emails sent by the system. Using a smart editor, you can create dynamic, informative, and engaging messages for various notifications, ensuring clear and consistent communication with your users.

System Messaging

System messages allow you to share information with your clients on multiple pages on the User Portal. There are several messages and elements that should be a priority when setting up a system initially. Here is a list of what should be reviewed and updated:

- **System Messages/Pages**
  - Login
  - Permits
  - User Registration
- **System Messages/Messages**
  - Admin Dashboard
  - The Vehicle Disclaimer
  - The Permit Disclaimer
- **Email Headers and Footers**
  - Header
  - Footer
- **Email Templates**
  - Lost Password
  - User Receipt

ViolationAdmin Setup

ViolationAdmin uses inventive mobile technology to efficiently track, manage, and record violations to support your parking environment. To get this module configured, you will be required to complete a number of tasks. You will need to setup your Ticket Categories, Offence Items and Locations.

Proof and Order your Violations stock

Your Account Executive will be in contact to ensure you are getting the correct printed tickets and that you approve the design. This can have a long lead time and should be done quickly. If you are sourcing your own Violation stock, please ensure you allow yourself 4–6 weeks to have them printed and shipped to you.

Handheld Enforcement Setup

Your Training Coordinator will go through using the handhelds, but it is beneficial to work through the Handheld Training to make the this more meaningful for you.

Preparing to Import your Data

Many customers want to bring their existing data with them when they transition to OperationsCommander. Data imports can seem complicated, but they start with a clear understanding of what is needed and clean data. Refer to this wiki article for all the details about preparing your data.

Using Your Own Domain - Vanity URL

OPSCOM supports the use of vanity URLs to keep your branding consistent for all your clients. This is a simple process. Not all service levels include this option and there could be fees associated with the setup.

Please contact your Sales Representative for more information at sales@ops-com.comcom.

Purchase Your Domain

We can work with any legal and registered domain that you own or have control over. Most clients will already have a domain they wish to use. Setup is quite simple and involves pointing a **subdomain** at our server. The resulting subdomain URL will be the final URL you will give to your clients.

Domains and subdomains cannot have spaces, are limited in size and are case-insensitive.

Example of a registered domain: **yourdomain.com**

Example of an OPSCOM service subdomain: **parking.yourdomain.com**

* *subdomain can be any combination of A-Z, 0-9, and hyphen ,   * domains and subdomains are not case-sensitive*

Sample DNS Setup

Option	Format	DNS Entry	Notes

1	yourdomain.com	@ CNAME <client>.OPSCOM.com.	point entire domain to client OPSCOM installation
2	***parking*** .yourdomain.com	parking CNAME <client>.OPSCOM.com.	point subdomain to OPSCOM installation

Resulting URLs

Option #1 - Domain

-point entire domain to OPSCOM

It would look like this for the **user portal - https://yourdomain.com**

And the **admin portal** would be **- https://yourdomain.com/admin**

Option #2 - Subdomain

- point subdomain to OPSCOM

It would look like this for the **user portal - https://subdomain.yourdomain.com**

And the **admin portal** would be **- https://subdomain.yourdomain.com/admin**

How Does it Work

We supply details to you so that you can add a CNAME record to your DNS. Once DNS is updated and a secure certificate is installed the domain will be active on our servers.

Certificate Registration

We use Let's Encrypt for SSL communication.

Once your subdomain is pointed at our servers, the certificate can be requested.

Contact Support

Email support@ops-com.comcom to let us know what you would like to use as your registered subdomain.

Phase 4 - Learning to Use OperationsCommander

> Now that you have OPSCOM set up, you can learn how to use it! The self-guided training is divided into modules to help break it down. Paid training is available for clients who wish a more in-depth view of using OPSCOM.
>
> Contact support@ops-com.com for some direction if you are getting confused and they will point you in the right direction or hook you up with paid training.

User Management

- Registering a New User (User Portal)
- Registering a New User (Admin Portal)
- User Profile Overview
- Managing Payment Type Subscriptions
- Credit Card Management in OPSCOM
- Electronic Funds Transfer (EFT) Subscriptions
- Using Tax Exemption
- Selecting User Profile Items
- User Types
- User Departments
- User Company Editor
- Limiting Active Vehicles
- Archiving or Disabling a User
- Merge User
- Bulk Email Users

Permit & Lot Management

- Lot Groups
- Planning Lot Groups and Lot Zones
- Pricing and Lot Admin
- Setting Up A Lot To Be Visible and Available To The End User
- Sales Window Management
- Permit Search
- Permit Switch
- Releasing a Permit
- Temporary Permit Printing
- Using Permit Proration
- Enabling Permit Rollovers without Previous Payment
- Preventing Permit Rollover after Cancellation
- Rollover: Auto Selection and Automatically Processing Payments
- Managed Waitlist
- Refundable Parking Deposits
- Applying a Temporary Permit to all User Vehicles

Violations & Enforcement

- Search Vehicles
- Search Vehicle Results
- Permit Misuse Notification
- Violations and Chalking
    - Issuing a Plate Violation
    - Issuing a Person Violation
    - Virtual Chalking
- Reprint Violation

Payments

Phase 5 - Final Preparations before Go Live

Now that the system is set up and you're familiar with OperationsCommander, it's important to:

- Do a final review of the User Portal to ensure you are happy with how it is presented to your customers.
- Create a test user on the system and log in to get a feel for the user experience.
- Do a “Penny Test” to ensure your payment provider is working correctly.
- If you will be issuing Violations, are your Offences and Locations set up?
- If you will be selling Permits or Lockers are your Sales Windows set up?
- If you will be enforcing are your Lot Zones set up?

If you have questions or concerns, take a screenshot and send it to_ support@ops-com.comcom.

Preparing to Import Your User Data

Many customers wish to port over existing data when they purchase the OperationsCommander system. Data imports can be complicated but they start with a clear understanding of what is needed and clean data. A Data Import may have been included with your system purchase or it may incur additional costs. You can also make use of our Data Importer (BETA). Contact your Account Executive or email support@ops-com.comcom to find out.

Preparing your User Data

Clean Data

After exporting your data from your current system, you must clean the data. This includes removing duplicate entries, correcting typos, and ensuring consistent data formatting (e.g., date formats, capitalization).

Data Strategy

You must decide on your User Management strategy:

- What will you use for a User Unique ID? Will it be email address, username, student/staff number? In order for you to stack data in the system, you must start by importing your users and populating a unique ID. This will then allow you to bring in more data and tag it to the correct users.
- Whatever you choose for Unique ID must not be duplicated.
- Will your users be setting up for SSO? If so you need to determine the login source for this.
- What details will you consider mandatory for a user profile?

Your OPSCOM system must be setup and some configuration done before importing your data. The following must be configured:

- User Types
- Lots
- Vehicle types, colors and makes
- Login sources
- User profile settings for mandatory fields.

Data Mapping

Any field that is allowed to be imported into OPSCOM is outlined in the **Request Object Attributes** section for each API document. For example if you are pushing in Users, you would review the Request Object Attributes sectionf for the User Create/Update API to find out what the name is for each column header you wish to import (Possible Names) and if there are any limits to what that field accepts in OPSCOM (Limits). Below is an example. If you are importing users, the column in the CSV file must be labeled unique_id and it must not have more than 50 alphnumeric characters including any dashes.

Unique ID	String	50-character alphanumeric including dashes.	unique_id	**(Required)** An unique identification number of the user.

Build out your CSV file with the column headers that match the data you are bringing into OPSCOM and follow the steps in the Data Importer documentation to begin importing.

Building on your Data

Once you have imported your users, you should now have a user record with a Unique ID that you can now add vehicle or permits to. You will reference the Unique ID for the user in each new CSV file you create so that the vehicle or permit gets associated to the correct user in the system.

Post-Import Actions

- **Verification**: Perform a spot-check of the imported data to ensure it's correct. You should check a few user profiles and vehicle records to confirm that the information has been imported accurately.
- **Error Log Review**: You will get an email with a post-import error log. This will explain which records failed and why. This is a critical step for troubleshooting and fixing issues.