Onboarding & Training Agenda

- System Messaging Checklist
- Module 1 - OperationsCommander (OPSCOM) System Setup
- Module 2 - User Management

System Messaging Checklist

> This article provides OperationsCommander (OPSCOM) administrators with a comprehensive checklist for configuring and customizing system messaging, portal design, and email communications to ensure a cohesive user experience.

Overview of System Messaging

The OPSCOM platform allows administrators to tailor the content and appearance of user portals and outgoing communications. While the system automatically generates functional page elements (such as login fields), many areas require or benefit from custom branding and instructional text.

> Many configuration areas include a **Toggle template** button. Clicking this will display a list of available templates for that section, allowing you to select and edit the desired component.

Portal Templates and Design

To create a consistent look and feel across your user portal, you must configure the global header and footer.

- **Header**: Customize this to include your organization’s branding, navigation, or contact information. This appears on all user portal pages.
- **Footer**: Use this space for additional links, copyright notices, or secondary contact information.

To configure these, navigate to **System Messaging** and click **Toggle template** to access and edit the **Header** and **Footer** files.

Configuring Pages and Messages

The **System Messaging** area is divided into tabs that control the content between your configured Header and Footer.

The Pages Tab

These pages occupy the central content area of the user portal.

- **User Dashboard**: Customize this page to provide relevant information or instructions for users upon login.
- **Login Screen**: Tailor this to include welcoming text or specific login instructions.
- **Payments Page**: Optional. Add text here to appear above the functional payment interface.
- **Permits**: Highly recommended for customization. This is an ideal location for a campus map and specific permit application instructions.
- **User Registration**: Optional.
- **My Vehicles**: Optional.

The Messages Tab

These items handle specific system notifications and document outputs.

- **Dashboard Message**: Configure content for the admin dashboard.
- **noPaymentOptions**: A standard message displayed when no payment options are available.

- **permitPDF** and **permitTempPDF**: Templates for printing standard and temporary permits.
- **tempPermitText**: Optional text for temporary permit notifications.

Popup Disclaimers

You can implement popup disclaimers that trigger based on page navigation or button interactions. Ensure your legal or administrative requirements are met by configuring the following:

- **Appeals Disclaimer**
- **Locker Disclaimer**
- **Permit Disclaimer**
- **Vehicle Disclaimer**

Email Communications

Email configurations ensure that all system-generated correspondence maintains your organizational branding and tone.

Headers and Footers

Similar to the portal design, you must configure **Header** and **Footer** templates for outgoing emails. It is common practice to include your organization's logo in the email header, though the footer can also be utilized for this purpose.

Templates and Notices

Access these via the **Email Templates** and **Notice Literature** sections:

- **Email Templates**: Includes **Appeal Decision**, **Appeal Submitted**, **Lost Password**, **Create Password**, **User Receipt**, and **Waitlist Selected**. Most are standard; review these to determine if customization is needed to match your organization’s voice.
- **Notice Literature**: These are critical automated emails sent to users regarding violations. You should customize:
  - **Overdue Notice Literature**: Sent when a user has an overdue violation.
  - **New Notice Literature**: Sent when a user receives a new violation.

Disclaimers and Messaging

Review the following for specific communication requirements:

- **Payment Footer**
- **Receipt Header**

Best Practices and Considerations

- **Review Standard Content**: While the system provides default messaging for many items, always review "Standard" labeled templates to ensure they align with your specific business rules.
- **Keep Instructions Clear**: When customizing pages like **Permits**, provide concise, actionable instructions to reduce support inquiries.
- **Maintain Branding**: Ensure your logo and contact information are consistent across both the web portal and email communications.

Module 1 - OperationsCommander (OPSCOM) System Setup

> This article provides an overview of the initial configuration steps required for new OPSCOM administrators to set up their production environment. Following these steps ensures your system is properly structured to manage users, permissions, and operational workflows.

Prerequisites

Before proceeding, review sections 1 through 3 of the **New Client Orientation and Rollout** checklist.

> Always perform your final configurations on your **production** system. Data created in the **preview** system is intended for testing purposes only and is **temporary**.

System Configuration

Administrators are responsible for establishing the framework of the system to align with organizational requirements.

Roles and Permissions

OPSCOM uses **Roles** to group permissions, allowing you to control access to specific information and features based on user job functions.

- Users can be assigned multiple roles simultaneously.
- To grant a user specific access, such as a **Patrol Officer**, define the necessary permissions for that role and assign it to the relevant users.

Managing Admin Accounts

Upon initial setup, the system provides one administrator account. You can manage additional accounts by referring to the *Managing Admin User Accounts* article.

Setting Up User Types

User Types define the rules for different groups of individuals within your system, such as distinguishing between **Full-Time Students** and **Part-Time Students**.

- Coordinate with your **Account Executive** to determine the appropriate **User Types** and associated rules for your organization.
- Determine the mandatory fields and profile information required during the **New User** registration process.

Admin Options

Many system settings are controlled through **Admin Options**, which manage the picklists used throughout the platform. Review these options to ensure your dropdown menus and selection lists match your operational needs.

ViolationAdmin Options

If your organization utilizes **ViolationAdmin**, you must configure the following:

- **Ticket Types**: Used to categorize the type of violation or ticket issued.
- **Offence Types**: Used to define specific offences, set fine amounts, and manage discount structures.

Customizing System Settings

Email Template Setup

The **Email Template** area allows you to customize the look and feel of communications sent to your clients. You can edit the branding and layout of these templates to maintain consistent messaging.

Invoicing Template Setup

The **Invoicing** feature streamlines monthly billing and bulk permit purchases. Configuring your invoicing templates ensures that all generated documents contain the required organizational details and branding.

Admin Landing Page

You can customize the message window that appears on the initial landing page when administrators log into **OperationsCommander**.

- Use this space to display important announcements, organizational schedules, or general information relevant to administrative staff.

Best Practices and Considerations

- **Collaboration**: Work closely with your **Account Executive** to ensure that your **User Types** and permissions align with your specific campus or organizational policies.
- **Consistency**: Maintain consistent branding and messaging across all **Email Templates** and **Invoicing Templates** to ensure a professional experience for your users.
- **Security**: Regularly audit your **Roles and Permissions** to ensure that administrators have the appropriate level of access required for their specific responsibilities.

Module 2 - User Management

> Users and their profile information form the backbone of the OperationsCommander (OPSCOM) software. This module links all other system areas, providing a complete history of user activity, permits, vehicles, and financial transactions. This article is for OPSCOM administrators who need to create, manage, and communicate with user accounts.

Setup and Configuration

Administrators can add users manually or facilitate self-registration.

Manual Registration

1. Navigate to the **Quick Registration** area.
2. Input all required user information, ensuring you assign the appropriate **User Type** to define the rules applicable to that user.
3. Click **Save** to create the account.

User Portal Registration

For information on how users create their own accounts via the portal, refer to the *Registering as a New User* wiki page.

Using this Feature

You must search for a user to access their account details. Once located, click the **Username** in the search results to open the **User Profile Landing Page**, which serves as a quick-reference dashboard for the user's information and history.

User Profile Landing Page

From this dashboard, you can perform the following actions:

- **Edit user profile**: Update personal details, configure **Tax Exemption** information, add or edit **Stored Credit Cards**, and manage **Payment Subscriptions**.
- **View and edit associated vehicles**: Add, edit, or remove vehicles. This area is also used to toggle **DNTT** (Do Not Ticket or Tow) status for a vehicle.
- **View outstanding Violations**: Quickly identify any unpaid or active citations.
- **View active Permits**: Access a summary of the user's current parking permissions.

User Profile Tabs

Use the tabs located across the top of the profile to manage specific aspects of the account:

- **Manage Lockers**: Purchase or manage locker assignments for the user.
- **Purchase Permits**: Issue parking permits, including temporary permits and access cards. You may also **Sell Prorated Permits** from this tab.
- **Manage Payments**: Process payments for all due items, including lockers, permits, and violations. This tab also displays financial adjustments made to the account.
- **View User History**: Review all transactions, including reservations, payments, appeals, **DNTT** records, and email logs. You can also access a complete system log of user transactions. If your organization uses

the **IncidentAdmin** module, you may also view or edit incident history here.

Merging Users and Vehicles

If you encounter duplicate profiles or data errors, use the merge tools to consolidate information:

- **Merge Users**: Combine two profiles for the same person. This is often necessary if a user created a profile in error, underwent a name change, or if a manual admin-created profile duplicates a user-created one.
- **Merge Vehicles**: Combine two vehicle records. This is particularly useful when a vehicle with existing violations is added to a user account, as it associates the violation history directly with that user.

Communication and Custom Forms

Bulk Email

To target communications to specific user groups, use the **More...** menu to access email filtering options. You can also export the **Consented Report** to identify all users who have opted into email communications.

Forms Module

If your organization has purchased the **Forms** module, you can create custom forms for user requests, such as parking exceptions or move-in/move-out coordination.

> Regularly review your **Consented Report** to ensure your bulk email communications comply with your organization's messaging policies and local privacy regulations.

Best Practices and Considerations

- **Data Integrity**: **Always use the Merge tools when you identify duplicate user or vehicle records.** Maintaining a single, accurate profile for each user ensures that history, violations, and permit data remain correctly linked.
- **Verification**: When manually adding a user, verify the **User Type** carefully, as this determines the parking rules and permissions that will apply to that individual.