

# Premium Rollout

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# Rollout Project Schedule

## Phase 1 (*estimate: 2 weeks*)

After receiving the contract signoff, the first step in the project is to confirm the requirements and begin a more in-depth gathering of information from the client. Your Account Executive will schedule a conference call for discovery.

You may choose to invite other relevant staff from your organization to the table to discuss expectations and clarify requirements.

An overview of tasks to ensure a successful smooth deployment is included. Some areas that will be covered immediately are as follows:

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

Your preview and production systems will be created and given to you at this time. You will find it useful to start using your preview system immediately.

You can practice and make changes to this system without being concerned about impacting your customer-facing system. The Preview site can be reset to defaults many times and nothing you do there will be permanent. It is a great place to experience and learn the system. For information about your preview system check out [this wiki article](#).

Billing occurs at this stage usually for both sign-off and the Preview Go Live Milestones.

## Phase 2 (*estimate: 2 weeks*)

After the initial preparation and research are completed, we will move to Phase 2 and begin assembling the standard components of your installation including the technical and financial requirements, and implementing the hosted payment solution.

The New Client Orientation and Rollout wiki will continue to guide you through all tasks in this phase along with your Trainer and Account Executive. Other areas of coverage include:

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

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

Phase 3 is the stage where we focus on the client-specific content of the installation. This is where any custom development work is completed, or data imports are managed. This is also the time when we would look at integrations with any external data supplier such as the new Mobile Parking App Solution or to integrate your Meters into the violations database for real-time enforcement.

You will also be introduced to the self-guided training agenda so that you can start playing with your preview system and understanding how things work.

Your Account Executive and/or your 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 where staff on both sides work through the various functionalities of the installation to both learn the specific operations and identify any potential bugs or client process misses before Go Live.

This is also when your Training representative will be working with you to ensure you are understanding the system and how to use it. Sessions with you and your team will be set up at a time that is convenient with you to work through live training sessions about the various modules in the system.

## Phase 5 (*estimate: 1 day*)

Phase 5 is the final step of the project when all the tasks have been completed, custom requirements fulfilled, and the Live site is launched for public use.

Final Go Live milestone billing is completed and your recurring revenues are also billed.

# Section 1 - Getting Started

It takes many people to get a successful deployment that meets your needs, covers all your business processes and ultimately gets deployed to your users. For this, you will need a team to support your efforts. Both the OPS-COM team and your organization must bring critical players to the table to ensure success.

## Team Accountability

### Responsibilities of the OPS-COM Team During Rollout

#### **Overall Project Manager**

You will be assigned a Project Manager from the OPS-COM team once a signed contract is returned. The Project Manager's job is to manage the technical deployment of the OPS-COM solution, coordinate the training and setup, and ensure all custom pieces are developed according to the agreed upon client scope.

#### **Setup and Configuration Specialist**

You will also be assigned a Setup and Configuration Specialist. Their job will be to gather information on your current business processes and advise on how to transition them to OPS-COM. They will also advise you on the best practices of system setup and help you understand what other clients have done to resolve any issues that came up during deployment. You will be given a document with a series of questions about your business. This must be filled out before we proceed with the setup and configuration.

An example of this document can be found here -

[https://docs.google.com/spreadsheets/d/e/2PACX-1vRjrN\\_-0ThpJqtLZ2iGRjvRgd4\\_fNymqY5dRBxyhJOx\\_JDu6FUNzdzayQPXa50CJkHOkzL1oVdd6H\\_o/pubhtml?gid=0&single=true](https://docs.google.com/spreadsheets/d/e/2PACX-1vRjrN_-0ThpJqtLZ2iGRjvRgd4_fNymqY5dRBxyhJOx_JDu6FUNzdzayQPXa50CJkHOkzL1oVdd6H_o/pubhtml?gid=0&single=true)

#### **Trainer and Support Liaison**

If included with your install, a Trainer will be responsible for explaining how the system works, answering your questions and introducing you to the support process and procedures that you will need after Go Live. Some support levels only have access to the wiki or the training resources.

## Client Responsibilities During Rollout

Every new client must have a Project Manager that works for your organization. This person must understand your business processes and be familiar with your implementation goals. This is often the Parking Manager. This person will assemble the rest of the team that should consist of the following contacts:

- IT Contact - Person in charge of SSO integration or other system integrations
- Hardware Contact - Person in charge of the Handhelds, Printers and Cameras, if applicable
- Financial Contact - Person in charge of gathering the Hosted Payment details

If you cannot provide a project manager one will be provided by the OPS-COM team for a fee. The project managers will work together to come up with a plan that covers all aspects of OPS-COM deployment outlined below. Your Project Manager must have time to devote to the Rollout and must complete the Rollout documentation (homework (smile)) before training and setup sessions are booked.

## Setup of Customer Account & Billing

After sign off of the contract, you will be set up in our billing system and you will receive a client welcome email with your account details.

We will need the following information from you:

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

The IT organization for our clients often have questions about how we handle your data, secure our system and ensure the safety of your data. Please feel free to share the OPS-COM Security White Paper with anyone who requires it.

# Utilizing OPS-COM Support

You will be directed to email many things directly to [support@ops-com.com](mailto:support@ops-com.com) over the course of your roll out. You can also launch a support ticket from inside the software at any time if you need help or have questions.

## Related Pages

- [Security Whitepaper](#)
- [Customer Support FAQ](#)

# Section 2 - Learning the Basics

## Setup of OPS-COM Preview and Production Spaces

Production spaces are generally available to you within 1 week of contract sign off. Your OPS-COM domain will be agreed upon during setup. An example of this domain may be [yourdomain.ops-com.com](#). Please note, www. is not required as part of the domain name.

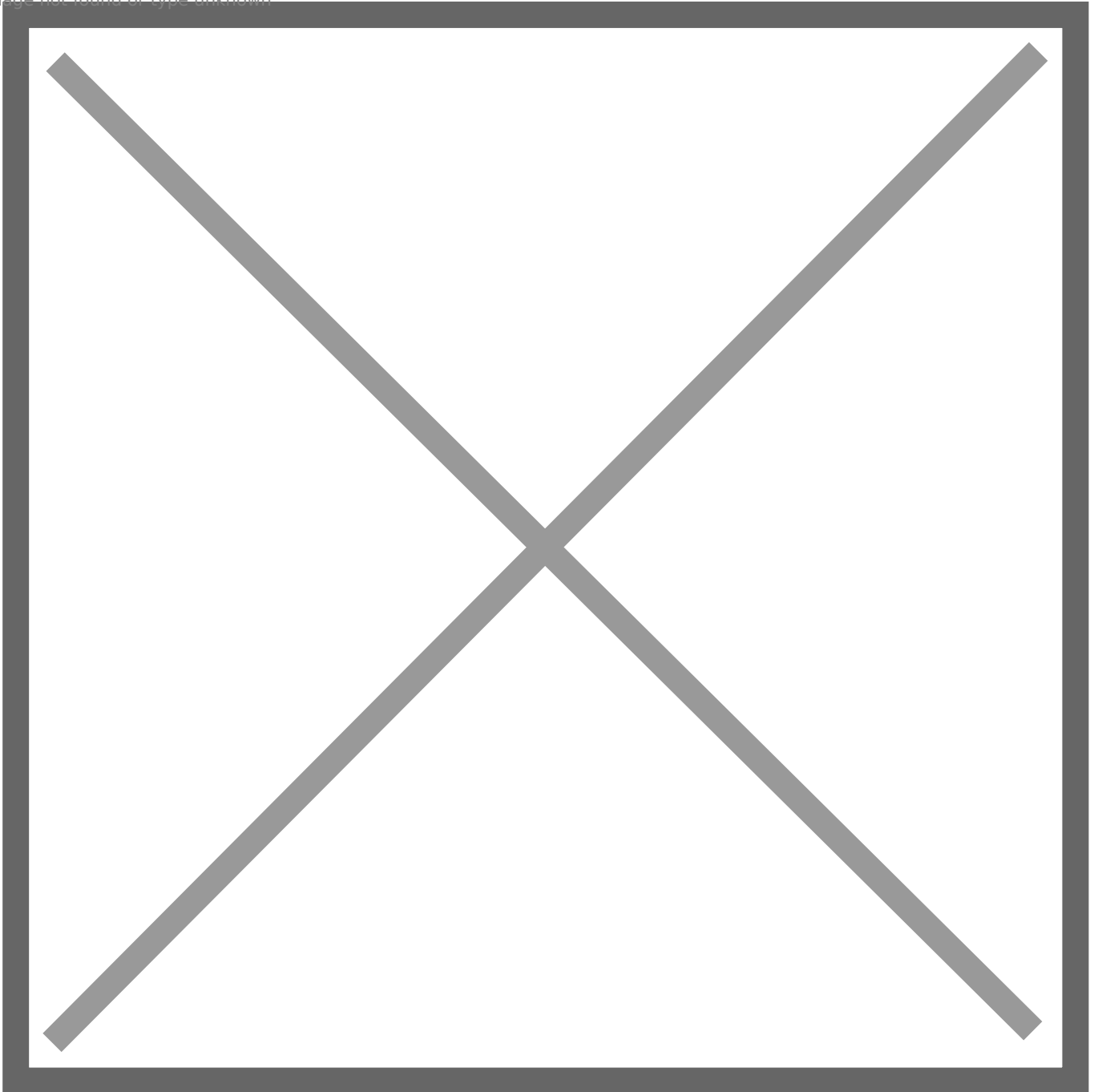
Clients who have paid for this service get a testing/preview space as part of their installation. The preview spaces exist to allow clients to test or stage changes to their system. The preview spaces are secured in the same manner as our production/live systems though they exist in a testing environment. As an OperationsCommander client, you can access your preview space by simply adding the "-preview" suffix to your subdomain name. Using the example above your preview space would be

[yourdomain-preview.ops-com.com](#)

You will be given the links and login details for both the Preview and Production spaces once they are live. Preview Spaces are denoted with an orange warning banner as seen below in the screenshot.



Image not found or type unknown



The Preview spaces are very useful for testing and training. They allow you work with a copy of the live database so that you will have real data to work with without affecting your production system. The database can be manually reset at any time by following the instructions in the Preview Spaces. This will allow you to "erase" your training data and start testing again.

This is generally the part where the second billing occurs for the Preview/Production Go Live. An invoice will be sent for the second milestone payment, if it is set up this way in your contract.

## Admin and Client Domains

There are two aspects of the OPS-COM system; the Admin Portal and the End-User interface. We refer to them as the Admin and User Portals. After setup, you will be able to access your Operations Commander Admin console at [yourdomain.ops-com.com/admin](http://yourdomain.ops-com.com/admin) and your clients can access OPS-COM at [yourdomain.ops-com.com](http://yourdomain.ops-com.com).

You will need to reference the URL for the User Portal on your tickets and 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. ***Please note, www. should not be communicated as part of the domain name.***

# Determining Access to OPS-COM

There are two components to this process, you must determine your roles and permissions and then you must add Administrators and assign Roles to them.

## Determining your Roles and Permissions

OPS-COM allows System Owners and Administrators the ability to set up roles that will restrict access to information and features in OPS-COM. **Roles** are a group of permissions that are bundled and assigned to a set of users. For example, you may wish to create a role for Patrol Officer. You will set the permissions for this role and assign users the role of Patrol Officer when you would like to grant them permissions that match that job.

## Creating Administrator Accounts

When the system is set up for the first time there will only be one Administrator. The OPS-COM team will have set it up and provided the login details to you.

## Setting up a Landing Page for your Administrators

When you sign in to OPS-COM initially, you are presented with a landing page. This message is referred to as the **Admin Dashboard**. This landing page can be modified or edited to allow organizations to display important information to System Administrators and staff.

Initially, it is a good place to direct your Admins to the training and support information as you navigate the system. Here are some ideas for what to put on this page once you go live:

- [Pricing Information](#)
- [Contact Information](#)
- [Scheduling Information](#)
- [Organizational Information](#)
- [Legal Notices](#)
- [General Information](#)

# OPS-COM Wiki and Training

The OperationsCommander parking and security wiki is a growing wealth of information about using our software and how to apply best practices in a busy security office. Before you schedule training, it would be very helpful to review the wiki. To assist with your transition to an improved operational model or to see how parking management can be made easy, we have organized this wiki into Training Modules that users can go through at their own pace. Contact your Training Coordinator by emailing [support@ops-com.com](mailto:support@ops-com.com) if you have any questions.

## Related Pages and Videos

- [Roles and Permissions Video](#)
- [Roles and Permissions](#)
- [Preview Spaces](#)
- [Admin User Accounts](#)
- [System Dashboard](#)

# Section 3 - Hosted Payment and Gateway Setup

## Hosted Payment Setup

With Hosted Payments, the payment processor directly handles the payment method details and provides the end result to the client's service implementation. This provides you an additional layer of security because at no time is the credit card information presented to any other system than the payment processor. This also reduces the amount of data being passed from client software to the payment processor, as only the result of the transaction is communicated to client software.

Currently, we have integrated hosted solutions with the following payment providers:

- Bambora
- OpenEdge - EdgeExpress
- PayPal
- Moneris
- Chase PaymentTech
- TouchNet
- Authorize.Net

Hosted Payments article explains the details you need to provide us to set up your payment system. If you are using Text2ParkMe or doing direct billing (invoicing) to Credit Cards you must also supply us with the details required for a gateway setup. We have some providers that will support both Hosted Payments and Tokenized recurring payments. OpenEdge and Bambora . Please contact your Sales Rep for more information about getting set up for these payment types.

Please note, gathering these credentials can take time. Getting all the required information depends on how responsive your Payment Provider is. This should be started as soon as possible.

## Electronic Funds Transfer Setup

OPS-COM can accept **Electronic Funds Transfer (EFT)** payments from your clients if you have done the necessary custom development to use this system. Currently, we only offer this service for the **Royal Bank of Canada**. Contact your Sales Representative if you are using another provider.

EFT is used as a recurring payment method when paying for permits through the rollover process only. EFT cannot be used in any other way in OPS-COM.

# Visible Payment Types

In OPS-COM you can make certain payment types available to Users and other payment types available to your Admins only. You must send a list to [support@ops-com.com](mailto:support@ops-com.com) to indicate what types you wish to be available to which users.

## Related Pages

- [Hosted Payments](#)
- [Electronic Funds Transfer \(EFT\)](#)

# Section 4 - Gathering Information about Your Requirements, Integrations and Data Import

## Process Information Gathering

After contract sign off, we will require answers to several key questions about your current business processes. You will be asked about your Parking and Enforcement environments, staff levels, user types, etc. These questions will be sent to you, by email, in advance of setup and configuration training. An example of this document can be found here -

[https://docs.google.com/spreadsheets/d/1BKDC8mPc9QoBQha\\_05r\\_PVIYDj2j45YcnKd9jqUImk4/edit?usp=sharing](https://docs.google.com/spreadsheets/d/1BKDC8mPc9QoBQha_05r_PVIYDj2j45YcnKd9jqUImk4/edit?usp=sharing)

## Custom Integrations and Development

You may have included in your contract some custom development or integration pieces. These will be scoped out with you during this time as well. For clients who are looking to integrate OPS-COM with Banner, Workday, SSO systems, T2 terminals, CALE devices, or others, please refer first to **Integrating with OPS-COM** in **Related Pages**. It will help you understand what we may require from your team in order to get this done as smoothly as possible.

## Data Import

If you have paid for, or are being quoted for, doing a data import, we will work with you to ensure the data is provided to us in a format we can import. A sample .csv file can be found on that page that will help ensure you are mapping your data to the correct column headers. Each import is unique and not all data can be imported. This will be assessed with a support representative and a quote will be provided to you before proceeding.

## Related Pages

- [Custom Development Expectations](#)
- [Integrating with OPS-COM](#)
- [Preparing to Import Your User Data](#)

# Section 5 - Setup of OPS-COM Config and Admin Options

## Setting up the Look and Feel of the User Portal

The User Portal is the site you will send your clients to. From there they will purchase permits and lockers, join waiting lists, and appeal and pay for violations. Your staff can customize the look and feel of this portal by editing the standard templates that come with OPS-COM. Your trainer will go over how to use the Templates and System Messages.

Please refer to the System Messaging Checklist for very detailed information.

## Uploading Images for Use in Templates

To place images in the different templates, you must upload them to the File Manager.

## Priority to Apply to Message Editing Upon Launching a New OPS-COM Site



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  
Appeals Message

**System Messages/Messages:**

Appeal Disclaimer  
Admin Dashboard  
The Vehicle Disclaimer  
The Permit Disclaimer

**Email Headers and Footers:**

Header  
Footer

**Email Templates:**

Appeal Submitted  
Lost Password  
User Receipt

# Template Design

OPS-COM offers powerful flexibility to allow your team to customize the look and feel of your User Portal system. This is done by designing the site template. You will require your graphics and any messaging you would like to see on the pages.

# System Messaging

System messages allow information to be shared across multiple pages through the use of short code tokens and they also deliver the content to your clients that is important to you.

# Email Template Setup

Default email templates are used when clients receive receipts/messaging for payments, password resets, incident reports, permit invoice, and appeals submitted by users. By editing these

templates you are adjusting these messages to include the desired text and images you prefer.

# Invoice Template Setup

An admin has the ability to edit the look and feel of the invoice email template.

# User Setup

Your Account Executive will help you determine what user types may be useful for you to set up and what the rules appropriate to those users may be. For example, you may want to allow Full-Time Students to park in different lots than Part-Time students. User Types will lay the groundwork for you to do this.

You will also need to decide what information you will require when a new user creates a profile on your system.

You will also need to set up the Vehicle description information and your locations.

# ParkAdmin Setup

A powerful aspect of OPS-COM is the ability to set up Virtual Parking lots and segregate them into Lot Groups and Zones. You will also have to give consideration to the types of permits and the rules for each permit type that you would like to use. For example, you may want to allow for permits that are sold daily or monthly.

Your Training Coordinator will discuss this in detail with you.

# ViolationAdmin Setup

ViolationAdmin uses innovative mobile technology to efficiently track, manage and record violations to support your parking environment. To set up this module, you will be required to complete a number of tasks. These tasks are listed below.

# Proof and order your Violations stock

Your Account Executive will be in contact to ensure you are getting the correct 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.

## Input your Offences

OffenceAdmin allows Administrators to add, remove and edit the offences that are used to issue Violations. Fine amounts are set and the discount for each offence is administered here. You must populate your Ticket Type groups and your corresponding offenses.

## Set up your Handhelds and Printers

If you have purchased the hardware through the OPS-COM team, we will ship them directly to you with the software pre-loaded and the printer's paired. If you have sourced them yourself, you will need to follow the instructions in the wiki articles to complete the setup of your Android handheld units. You will also need to use the instructions in the wiki articles below to set up and pair your printers.

- [Setting Up your Handheld Units for the First Time](#)
- [Setting your Android for Auto-Updates](#)
- [Printer Setup](#)

Your Training Coordinator will go through using the handhelds but it is beneficial to work through the Android Handheld Wiki to make the training more meaningful for you. In particular, it is important to familiarize yourself with the Best Practices for OPS-COM Android wiki article.

## Related Pages

- [System Messaging Checklist](#)
- [Manage Files](#)
- [Template and Design](#)
- [Email Templates](#)
- [Invoice Template](#)
- [User Types](#)
- [Company Setup and Invoices](#)
- [Vehicles Setup](#)
- [Location Setup](#)
- [Parking Setup](#)
- [Violations Setup](#)
- [First Time Installation - Android](#)
- [Handhelds Devices Settings](#)
- [Setting Device to Auto-Update](#)
- [Install Bluetooth Printer](#)
- [Best Practices](#)

# Section 6 - Text2ParkMe Configuration

Text2ParkMe allows users to utilize their personal cellphone's SMS functionality to purchase parking in the system without the use of any special app. If you have purchased this module, we must set you up with a telephone number that your users can text to. Please email support to let them know your preferred area code and location for setup.

Refer to the Self-Guided Training Agenda for more detailed information.

## Related Pages

- [Training Agenda](#)

# Section 7 - Final Preparations before Go Live

Now that the system is set up and you are familiar with OPS-COM, it is important to do a final review of the User Portal to ensure you are happy with the way it is presented to your customers. You can create a test user on the system and login to have a look around and see what the user experience it like. Make sure you are happy with all messaging that is presented to your clients. If you have questions or concerns, take a screenshot and send it to [support@ops-com.com](mailto:support@ops-com.com).

Checklist before going live:

- If you will be issuing Violations, are your Offences and Locations set up?
- If you will be accepting payments, are your payment types set up correctly by user type?  
Are the payment types that are accepted on the User Portal set up correctly?
- 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?
- Is all your User Portal system messaging set up?