User Management

OperationsCommander works hard to maintain an up to date product wiki! If you have any questions or if you feel something is missing, post about it in the community.

Registering a New User

> User Registration allows OPSCOM administrators to manually create new user accounts, granting access to the User Portal. This process enables individuals to utilize features such as purchasing parking permits, renting lockers, and managing violations, ensuring a comprehensive record for each system user.

Setup & Configuration

> There are a number of permissions you can enable that will allow you to have the full compliment of User Management controls. Everyone, does not need this level of access. It makes sense to restrict this to the Primary Admins. The permissions come standard to the Primary Admin role when OPSCOM is first installed.

Admins who are setting up Users as part of their daily role, will need the **View Users** and the **Edit Users** permission found on the **User Management** tab.

1. Hover over **System Configuration,** then **Admin Management,** and click **Manage Roles.**
2. Click Permissions on the role you want to grant this to.
3. On the **User Management** tab, enable the **Edit Users** checkbox.
4. Enable the **View Users** checkbox.
5. Click **Save Permissions**.

Using this Feature

The user registration process involves two main stages: initial basic information entry and then full profile completion.

1. Hover over **User Management**, and click **User Registration**.

Basic User Information

1. Fill out the initial standard information on the **User Registration Form**:
   - Select the appropriate **User Type** for the new user.
   - Enter a **Username** and the required basic user information (e.g., first name, last name, email).
2. Click **Submit Registration** to proceed to the next stage of profile setup.

Completing and Activating the User Profile

1. On the **Edit User Profile** page, ensure the checkbox for **Allow user login and mark account as active** is enabled.
   - > This setting activates the user's ability to self-manage their account via the **User Portal** and will prompt them to change their password upon their first login.
2. Complete all remaining profile information, ensuring all **mandatory fields** are filled.

   Refer to the linked wiki articles for each mentioned field below.
   - Locker User Type
   - Tax Exemption Code
   - Company Member/Individual

    - Account number
    - Receives Invoice checkbox
- Department Name

3. Click **Submit Profile Information**. The **Confirm Registration Information** screen will appear. Carefully verify that all information displayed is correct.
    - If any edits are needed, click **Back** to return to the previous page.
    - When ready to proceed, click **Information Correct**.

> Fields marked with a red exclamation mark (!)* after a failed submission are mandatory fields that must be completed. Administrators with proper permissions can adjust which fields are mandatory.

Registration Completion

- You will be directed back to the **Edit User Profile** screen, where a pop-up will confirm that the user profile was successfully updated.
- The registration process is now complete. Refer to this wiki article to see what you can do now that you have a User Profile entered.

Best Practices & Considerations

- **Mandatory Field Management**: Understand that administrators with appropriate permissions can adjust which fields are mandatory for user profiles via **System Settings > User Profile**. Review these settings to ensure all necessary data is collected during registration.

- **Password Prompt**: Inform new users that they will be prompted to change their password upon their first login to the User Portal.
- **User Type Selection**: Accurately select the **User Type** during registration, as this impacts the user's access to lots, payment types, and profile field visibility.
- **Post-Registration Actions**: After registration, the system allows immediate actions like adding a vehicle or purchasing a permit. Guide the user or perform these actions as per your organizational workflow.
- **Email Verification (If Configured)**: If your system is configured to require email verification for new accounts (a setting outside of this specific registration process), ensure the user knows to check their email for the verification link before they can fully log in, even if you manually registered them.

User Search

> **User Search** provides administrators with a powerful tool to quickly locate and access specific user accounts within the system. This feature enables efficient viewing and editing of user information, supporting various administrative tasks such as profile updates, violation management, and permit assignment.

Using this Feature

The **User Search** screen allows you to input various criteria to find specific users and refine your search results.

1. Hover over **User Management,** and click **User Search**.

Entering Search Criteria

1. Click the Toggle More Options button to see all available fields on the **User Search** screen.
2. Refine your search results by selecting one of the following radio button options:
    - **Any Users**: Displays both enabled and disabled user accounts.
    - **Enabled Only**: Displays only active user accounts.
    - **Disabled Only**: Displays only disabled user accounts.
3. Enter your parameters and click the **Search** button.
4. The search results will appear in a table below the criteria box.

> There is a limit to how many records will return. If you see the message "The search has returned more records than allowed and has been

> truncated. Please refine your search." You will need to narrow down your criteria.

Available Actions from Search Results

From the search results table, you can typically perform various actions by clicking on the user's name or associated icons, such as:

- Click on any **column header** to resort the results alphabetically.
- Click the **Username** button to access the **User Profile Landing Page**.
- Click the **Envelope** icon to start an email to that user.
- Click the **Clock** icon to shortcut to the user history.
- Although no export button is available, it is possible to copy the search results directly into Excel or Google Sheets.

Best Practices & Considerations

- **Combine Criteria**: For more precise results, especially in systems with many users, combine multiple search criteria (e.g., first name and last name, or username and User Type).
- **Utilize "Toggle More Options"**: Don't hesitate to use the expanded search options when you need to find users based on less common data points.
- **Disabled Accounts**: Remember to select "Any Users" or "Disabled Only" if you are looking for accounts that may have been deactivated.
- **Data Integrity**: Accurate and up-to-date user information in the system will yield more reliable search results.
- **Quick Access**: Use the User Search as your primary tool for quickly navigating to a user's comprehensive profile for any administrative

task.

User Profile Overview

> The **User Profile Landing Page** in OPSCOM serves as an administrator's central dashboard for a user's comprehensive information and current activity. This page offers a quick reference view, enabling efficient access and management of user details, associated vehicles, violations, permits, and other crucial historical data.

Using this Feature

1. To navigate quickly to a user's profile, you can use the **Quick Search** function or hover over **User Management**, and click **User Search**.
2. Locate and select a user, and the **User Profile Overview** page will be displayed. This page provides various sections and actions for managing user data and viewing their history.

Editing a User's Basic Profile

1. Click the **Edit** button on the **Basic Profile Information** section.
2. The full user profile editing form will display, allowing you to update various account details.
   - The **Edit User Profile** form is structured into three main categories: **Personal Information**, **Student Information**, and **Staff/Faculty Information**. Each category contains various fields that can be individually set to **Hidden**, **Visible**, or **Required** (as defined in your System Settings for User Profiles).

Logging in as a User

This feature allows administrators to view the system from an end-user's perspective.

1. Click the **Login as user** button**.**
2. A new browser window will open, automatically logging you into the OPSCOM end-user portal as the selected user, with all their associated functionalities.

> You may encounter an error if the Auto Login setting is not configured correctly in System Settings. If this occurs, please contact OPSCOM Support for assistance.

Viewing a User's Waitlist Position

If the user is on any waitlists, you will see the lots and their ranks listed in this section.

Adding or Editing Vehicles

1. In the **Vehicles** section, click **Edit**.
2. You will be directed to the **Vehicle Information** screen, where you can:
   - **Add new vehicles** to the user's profile.
   - **Edit or remove** existing associated vehicles.
   - **Apply a DNTT (Do Not Ticket Tag)** to a specific vehicle.

Viewing Additional Information

The User Profile Landing Page provides immediate access to a wealth of additional user-specific data:

1. The dashboard sections offer direct access to information regarding **Alarms**, **Deposits**, **Violations**, **User Notes**, and **Permit details**.
2. Any active alerts or warnings associated with the user's profile will be prominently displayed at the **top of the page**.
3. Active Deposits on the user account will be displayed if any exist.
4. Private user notes will be displayed and you can also add additional notes here.
5. **For Violations**:
   - View detailed violation information by clicking the **ticket number** within the **Violations** section.
   - If available, view photos related to a violation by clicking the **camera icon** next to the ticket number.
6. **For Permits**:
   - Access detailed permit information by clicking the **permit number** in the **Active Permits** section.

Best Practices & Considerations

- **Centralized Management**: Utilize the User Profile Landing Page as your primary hub for managing all aspects of a user's interaction with the OPSCOM system.
- **Efficient Troubleshooting**: When a user reports an issue, navigating to their profile landing page allows for a quick overview of their status, active permits, and recent violations, which can greatly aid in troubleshooting.
- **Testing User Experience**: The "Login as user" feature is invaluable for testing new configurations, verifying user access, or replicating user-reported issues directly from their perspective.

- **Comprehensive History**: Leverage the integrated views of alarms, violations, and permit details to understand a user's complete history within the system, informing decisions related to appeals, permit renewals, or enforcement actions.

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 OPSCOM 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, i.e.: 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 their previous permit through the same payment type so that the system would have a record of the payment type used.

Archiving or Disabling a User

> **Archiving or Disabling a User Account** in OPSCOM allows administrators to deactivate user access while preserving their historical data. This process is crucial for managing user access permissions, maintaining data integrity for past transactions and activities, and ensuring compliance when a user's role changes or they leave the organization.

Using this Feature

The process of archiving or disabling a user account begins by accessing their individual profile through the **User Profile Landing Page**.

1. Locate the user you wish to edit/update by searching.
2. Click on the **Username** from the search results, and their **User Profile Landing Page** will display.
3. Confirm that the name of the user displayed at the top right-hand corner of the page matches the user whose account you intend to modify.

You can choose to either temporarily disable a user's login access or perform a more formal archive, often linking to an **Archive User Type**.

Disabling a User Account (Preventing Login)

This method revokes a user's ability to log in to their OPSCOM account while keeping their profile and data fully intact for administrative reference.

1. Click the **Edit** button on the **Basic Profile Information** bar, or click the **Profile** dropdown menu and select **Edit Profile Information**.
2. The **Edit User Profile** screen will be displayed.
3. Locate and **disable** the **Allow user to login and mark account as active** checkbox.
4. Click the **Submit Registration Information for Processing** button at the bottom of the page.
5. On the **Confirm Registration Information** screen, click the **Information Correct** button to submit the change. The user's account will now be disabled.

Archiving a User Account (Categorized Disablement)

Archiving provides a structured way to disable a user account by assigning it to a specific "Archive Type," which can be useful for reporting or internal tracking.

1. Follow the steps 1-3 above.
2. On the **Archive Type** dropdown list, choose an appropriate **Archive User Type** from this dropdown list (e.g., "Former Student," "Terminated Staff," "Account Closed"). You must have created user types for this purpose if you want to see them in the drop down list.
3. Click the **Archive User** button.
4. Click **OK** on the confirmation pop-up to finalize the archiving process.

Best Practices & Considerations

- **Data Integrity**: Disabling or archiving an account is the best practice instead of attempting to delete a user. User accounts often have associated historical data (permits, violations, payments, login history), and direct deletion would compromise data integrity and historical reporting.
- **Permissions**: Remember that a disabled or archived user account retains its assigned roles and permissions for reporting purposes, even though the user can no longer act on them.
- **Reversibility**: Disabling an account is typically reversible. You can reactivate an account by re-checking the **Allow user to login and mark account as active** checkbox in their profile.
- **Archive Types**: Utilize different "Archive User Types" to categorize why an account was disabled (e.g., account closed, left organization, temporary suspension). This can be valuable for internal auditing and future reference.
- **Communication**: Ensure clear internal communication within your organization regarding the process for disabling/archiving user accounts and the reasons behind it.
- **Security**: Disabling accounts promptly when a user's access is no longer required is a critical security measure to prevent unauthorized access.

Using Tax Exemption

> OPSCOM supports **Tax Exemption Codes** for users, allowing the system to automatically waive applicable taxes during their purchases of items like permits, violations, and lockers. This feature ensures accurate billing for tax-exempt individuals or organizations and simplifies compliance with specific tax regulations.

Using this Feature

1. Locate the user you wish to edit/update by searching.
2. Click on the **Username** from the search results, and their **User Profile Landing Page** will display.
3. Confirm that the name of the user displayed at the top right-hand corner of the page matches the user whose account you intend to modify.
4. Click the **Edit** button on the **Basic Profile Information** bar, or click the **Profile** dropdown menu and select **Edit Profile Information**.

Adding or Updating a Tax Exemption Code

1. On the **Edit User Profile** screen, locate the **Tax Exemption Code** field.
2. Enter or update the alphanumeric tax exemption code in this field.
3. Click **Submit Profile Information**.
4. On the subsequent confirmation screen, click **Information Correct** to save the changes to the user's profile.

Verifying the Tax Exemption Code

The **Tax Exemption Code** is displayed in the **Profile Overview** window on the user's profile landing page for easy reference, allowing administrators to quickly verify its presence.

Tax-Free Transactions

When a user with a valid tax exemption code on their profile proceeds to purchase items (such as a permit), applicable taxes will **not** appear as a line item on the payment or confirmation page. The system automatically waives these taxes.

Generating the Tax Exemption Report

Administrators can generate a report to view all users with active tax exemption codes.

1. Generate the **Tax Exemption Report** from the **Payments** menu.
2. This report includes three key fields: **First Name**, **Last Name**, and **Tax Exemption Code**.
3. You can print or export the report records for further use, such as auditing or external reporting.

Best Practices & Considerations

- **Accuracy is Crucial**: Ensure that tax exemption codes are accurately entered and validated against official documentation to maintain compliance and prevent incorrect billing.
- **Internal Verification**: Establish clear internal procedures for verifying a user's eligibility for tax exemption before entering a code on their profile.

- **Compliance**: Understand your organization's tax compliance requirements and how this feature integrates with your overall financial processes.
- **Reporting and Auditing**: Regularly run and review the **Tax Exemption Report** for auditing purposes, ensuring that all tax-exempt transactions are correctly accounted for and supported.
- **User Communication**: Clearly communicate tax exemption policies to eligible users.

Retrieving Uploaded Files

> This article provides instructions for OPSCOM administrators on how to manage files uploaded by users. It covers the process of locating, viewing, and deleting user-submitted files from within the administrative portal.

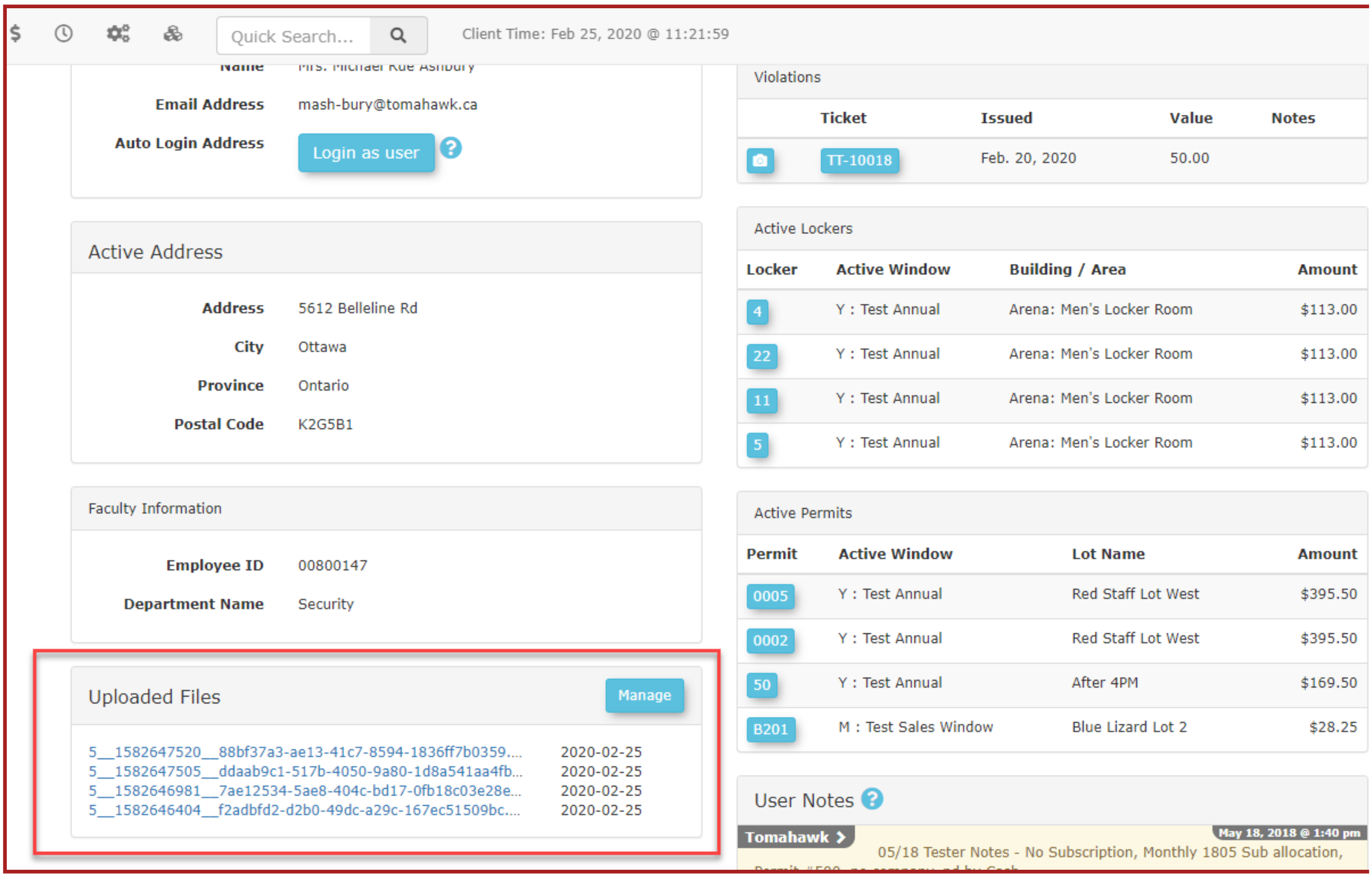
Using this Feature

File management is a standard feature which requires the appropriate administrator permissions:

- **View User Uploads:** Lets the administrator view the files that have been uploaded by a user.
- **Delete User Uploads:** Lets the administrator delete the files uploaded by users.

Additionally, it is important to understand the roles for uploading and managing files:

- **Admin Side:** Administrators can only view and delete files from the admin portal. They cannot upload files on behalf of a user from this interface.
- **User Side:** Only users can upload files to their own profiles.



All file management tasks for a specific user begin from their profile page in the admin portal.

Viewing Uploaded Files

1. Navigate to the target user's profile.
2. Scroll down to the Uploaded Files section on the user's dashboard.

- This section displays a preview of the five most recently uploaded files.
- To view a specific file, click on the hyperlinked file name.
- To view all uploaded files for the user, click the Manage button. This will take you to the user's main Uploaded Files page.

Deleting an Uploaded File

1. From the user's profile, click the View All button in the Uploaded Files section to access the full list of files.
2. On the Uploaded Files page, locate the file you wish to remove.
3. Click the Delete button associated with that file.

Best Practices & Considerations

- **Uploading Files for a User:** Administrators cannot directly upload files to a user's profile. To upload a file on behalf of a user, you must use the Login as User feature and follow the user-side workflow. Instructions can be found in the Uploading Files from the User-side article.
- **Viewing/Deleting User Files:** To view or delete user-uploaded files, ensure you have the appropriate permissions to perform these actions.

> **File Deletion is Permanent:** Once a file is deleted, it ***cannot*** be recovered. Always verify you are deleting the correct file before confirming the action.

Registering a Locker for a User

> 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.
> **Before** a locker can be registered for a user, the locker inventory must be configured in OPSCOM. This includes setting up **Buildings**, locker room locations (e.g., **Men's Locker Room**), individual locker numbers, and any associated fees.

Locker Registration Process

1. Go to **User Management**, then **Search Users** for the user you wish to register a locker for. Click their **Username** to navigate to their **Profile**.
2. In the user's profile, click the **Lockers** button to open the locker registration interface for that user.
3. On the **Locker Registration** page, select the appropriate building from the list under the **Available Buildings** heading.
4. **Choose a Location:** The screen will refresh to the **Locker Registration - Locker Selection** page. Click the drop-down menu to choose the specific locker location (e.g., **Men's Locker Room**).
5. **Reserve a Locker:** A list of available lockers will be displayed. Select the desired locker number from the list.
6. Click the **Reserve This Locker** button to proceed.
7. **Confirm the Reservation:** The **Confirm Locker Reservation** screen will appear, summarizing the details. Carefully verify the information and click the **Confirm Information** button.

8. **Process Payment:** You will be directed to the **Payments Due** screen. To finalize the registration, click the **Proceed to Payment** button and complete the transaction as required.

Best Practices & Considerations

- **Payment Finalizes Reservation**: In most configurations, a locker reservation is not considered final until payment has been successfully processed. If you navigate away from the **Payments Due** screen without completing the transaction, the locker may be released back into the available inventory.

> **Verify the Username**: Before selecting a locker, always double-check that the correct user's name is displayed in the top-right corner of the **Locker Registration** screen. This ensures you are assigning the locker to the correct profile.

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.

Managing User Vehicles

This article provides instructions for OPSCOM administrators on how to manage vehicles associated with a user's profile. It covers the complete lifecycle of vehicle management, including adding, editing, activating or deactivating, and removing vehicles, as well as managing Do Not Ticket or Tow (DNTT) statuses.

Using this Feature

All vehicle management tasks are performed from within a specific user's profile.

Navigating to the Vehicle Information Page

1. Go to **User Management** and click **User Search**.
2. Use the search fields (e.g., **name**, **username**, **email**, or **account number**) to find the desired user.
3. From the search results, click the user's **Username** to open their **Profile Page**.
4. Click the **Vehicles** tab to access the **Vehicle Information page**, which lists all vehicles associated with that user.

Adding a New Vehicle

1. On the **Vehicle Information page**, click the **Add New Vehicle** button.
2. On the **Add New Vehicle Information** screen, fill in all required vehicle details.
3. Click the **Add New Vehicle** button at the bottom of the form to save.

Editing a Vehicle

1. In the vehicle list, click the hyperlinked license **Plate** of the vehicle you wish to edit.
2. In the **Vehicle Information** window that appears, modify the necessary details.
3. Click the **Update Vehicle** button to save your changes.

Activating or Deactivating a Vehicle

1. In the vehicle list, locate the **Status** column for the desired vehicle.
2. The current status will be shown as a link (either **Active** or **Inactive**). Click this link to toggle the vehicle's status.

Removing a Vehicle from a User Profile

1. In the vehicle list on the user's profile, click the **X** icon in the row of the vehicle you want to remove.
2. Confirm the action in the subsequent prompt to finalize the removal.

> See the article Unlink a Vehicle from User Profile for the requirements to remove a vehicle from a user's profile.

Managing Do Not Ticket or Tow (DNTT) Status

1. In the vehicle list, click the **Record DNTT Link**.
2. This interface allows you to add, edit, or remove a **Do Not Ticket or Tow (DNTT)** notation. This status can prevent violation issuance under specific, pre-defined conditions (e.g., in a certain lot or during a specific time).

Best Practices & Considerations

- If you add a new vehicle but the details do not save correctly, it is likely because that license plate already exists in the system (associated with another user or archived). The vehicle must be properly associated with the current user before all details can be edited.
- Removing a vehicle only disassociates it from the current user's profile; it does **not** delete the vehicle record from the system. If the vehicle is associated with only one user, it will be archived. If it is associated with multiple users, it will remain active on the other user profiles.

> **Clear Balances Before Removal**: Before removing a vehicle that is only associated with one user, ensure any outstanding balances or violations tied to that vehicle are cleared.

Edit Primary Driver

> This article explains the process for OPSCOM administrators to set or change the **Primary Driver** for a vehicle. The **Primary Driver** designation is used to identify the main user responsible for a vehicle, ensuring they receive all official communications like violation notices. This guide is essential when a vehicle is associated with multiple user profiles.

Using this Feature

The option to change the **Primary Driver** is only available when a single vehicle is associated with two or more user profiles. If a vehicle is only linked to one user, that user is automatically designated as the **Primary Driver**, and the selection field will not be visible.

> The **Primary Driver** designation is managed from the vehicle editing screen within any associated user's profile.

How to Change the Primary Driver

1. Go to **User Management** and click **User Search**. Find any user associated with the vehicle and click on their **Username** to open their **Profile Page**.
2. Click the **Vehicles** tab.
3. In the list of vehicles, locate the desired vehicle and click the hyperlinked license **Plate**. This will open the **Edit Vehicle** screen.

4. Locate the **Primary Driver** drop-down menu. The list will contain all users associated with the vehicle.
5. Click the menu and select the name of the user you want to designate as the new **Primary Driver**.
6. Click the **Update Vehicle** button to apply the change. The system will now recognize the selected user as the vehicle's primary point of contact.

Best Practices & Considerations

- **The Role of the Primary Driver**: A nightly system process automatically attempts to assign a **Primary Driver** to any new vehicle. Furthermore, if a violation appeal is submitted for a vehicle that lacks a designated **Primary Driver**, the system will automatically assign the role to the user who submitted the appeal. This ensures there is always a designated contact for communications.
- **Correcting Legacy Records**: If you encounter an older vehicle record with multiple users designated as **Primary Driver**, simply follow the steps above to select the correct one. When you save the change, the system will automatically remove the incorrect legacy designations from the other associated users.

Unlink a Vehicle from User Profile

> This article provides instructions for OPSCOM users on how to remove the association between a vehicle and a user profile. This process is necessary when a user no longer owns a vehicle, or to correct a vehicle that was mistakenly linked to the wrong user account.

Rules to Remember

- In order for a user to remove a vehicle from their profile, these must all be true:
    - The setting to allow users to remove a vehicle must be enabled
    - The vehicle must not have any directly associated active standard or temp permits
    - The vehicle must not be associated to any incidents
    - The vehicle must not have any alerts on it
    - The vehicle must not have any valid violations
    - If the vehicle has a violation that was marked as a warning, the setting to allow this type of removal must be enabled first
- There is no minimum amount of time a vehicle is required to be dormant before it can be removed.
- These restrictions **do not** apply to admins removing vehicles from a user profile.

> **Important:** The **Allow users to delete vehicles** setting must be enabled under **System Configuration > System Settings > Vehicles** in order for users to delete vehicles from their profile.

Using This Feature

1. Login to your account on the user portal for your organization
2. Click on the Vehicles tab
3. Find the vehicle's plate you wish to remove, and click on the Remove button, with the trash can icon.
4. Click the **Vehicles** tab.

> **Note**: If you have been involved in incidents or the vehicle has outstanding fines and fees associated with it, you will **not** be able to remove it.

Best Practices & Considerations

- **Understanding Vehicle Removal**: Removing a vehicle only disassociates it from the current user's profile; it does **not** delete the vehicle record from the system itself. If the vehicle is associated with only one user, its record will be archived. If it is associated with multiple users, it will simply be removed from the current profile while remaining active on the other associated user profiles.
- **Clear Outstanding Balances First**: Before removing a vehicle that is only associated with a single user, it is critical to ensure all outstanding violations or fees tied to that vehicle have been resolved.

Understanding & Controlling Active Vehicles

Question

What is an active vehicle and how does it relate to the permits a user buys?

In our scenario, we require our end users to buy a permit for every active vehicle on their account. So if you have two active vehicles you must have two permits. What happens on rollovers though? If they only have one permit roll over but they still have two active vehicles? Does the system deactivate one vehicle?

Answer

Think of an Active Vehicle as any license plate you've told our system is ready to use a parking permit.

- It's a "Ready" Status: This status just means the vehicle is registered and eligible. It doesn't mean it's currently assigned to a valid permit.
- The Limit: The [maximum number of vehicles you can have "Active" is set by your User Type].

The answer in your scenario is No, the system does not automatically deactivate the extra vehicle.

- The system treats your vehicle's status as "STICKY". It assumes you might want to use that same vehicle again.
- So, if you had two Active Vehicles and only bought one permit for the new year, the system leaves you with two Active Vehicles and one Active Permit.

- This creates that mismatch you asked about! Your staff must use the **Active Vehicle Report**. This report finds every customer who has more active vehicles than permits. You can use it to deactivate the extra vehicle and make sure your vehicle count matches your permit count.

Remember...

	ActiveVehicleCount	**ActivePermitCount**

What It Is	How many license plates you have marked as 'Ready'	How many valid permits you bought for the new year.

Rollover Status	**STICKY!** This count carries over from year to year.	**RESET!** Only new permits count.

- **Too Many Cars, Too Few Permits?** If you have 2 active vehicles but only 1 permit, you may need to need to reach out to your users to get them to clean it up.

User - Parking Tab

> This article provides instructions for OPSCOM administrators on how to purchase both standard and temporary parking permits on behalf of a user. All actions are performed from the **Parking** tab within the user's profile, which serves as the central hub for managing a user's parking permissions.

Setup & Configuration

Before permits can be sold, all parking lots, permit types (e.g., yearly, monthly, temporary), and associated costs must be configured in the system. For more details on this process, please refer to the *Pricing & Lot Admin* page.

The process begins by navigating to the specific user's profile.

Navigating to the Parking Tab

1. Go to **User Management** tab and click **User Search**.
2. Use the search fields (e.g., **name**, **username**, **email**, or **account number**) to find the desired user.
3. From the search results, click the user's **Username** to open their **Profile Page**.
4. Click the **Parking** tab to navigate to the **Manage Lots** screen for that user.

Purchasing a Standard Permit

1. On the **Manage Lots** screen, locate the desired parking lot.
2. Click the **Standard Permit** button associated with that lot.

3. On the **Confirm Parking Permit Registration** screen, review the details, including location, permit type, and cost. You may have the option to edit the **permit number** and **permit cost** here.
4. Click the **Purchase this Permit** button and proceed with the payment process to finalize the registration.

Purchasing a Temporary Permit

1. On the **Manage Lots** screen, click the **Temporary Parking Permit** button.
2. On the **Temp. Parking Permit Registration** screen, configure the permit details:
   - Click the **Select a lot** drop-down menu and choose the appropriate lot.
   - Enter the **start and end dates** for the permit.
   - Choose the **temporary permit type** (e.g., all day or hourly).
   - Select the **vehicle** the permit will be assigned to.
   - Confirm the **Permit Number**.
   - Enable the **DNTT (Do Not Ticket or Tow)** checkbox if this temporary permit should prevent violation issuance.
3. Click the **Confirm this Permit** button.
4. On the **Confirm Parking Permit Registration** screen, review all the details one final time.
5. Click the **Purchase this Permit** button and proceed with the payment process.

Best Practices & Considerations

Using the Waitlist: If you attempt to purchase a standard permit for a lot that has no available inventory, the system will not allow a purchase. Instead, you can click the **Waitlist** link to add the user to the queue for that lot. A prompt will appear to confirm the action.

When to Use DNTT: The **DNTT** checkbox on temporary permits is a powerful tool. It is typically used for special circumstances, such as for guest speakers or visitors, where you want to ensure their vehicle is not ticketed for the duration of their temporary permit.

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.

Purpose and Overview

This article outlines the process for OPSCOM administrators to make a payment on behalf of a user. This functionality is essential for handling phone-in payments, in-person transactions, or assisting users who are unable to complete the payment process themselves. These instructions are intended for administrative staff with payment processing permissions.

Using this Feature

No special configuration is required to use this feature, provided that your organization's payment gateway and item pricing have already been configured. For more details on these initial setups, please refer to the *Payment Gateway Configuration* and *Pricing & Lot Admin* articles.

Follow these steps to process a payment for a user account.

1. Go to **User Management** and click **User Search**
2. Use the search fields to find the user by their **Name**, **Username**, **Email**, or **Account Number**. Click the user's **Username** in the search results to open their **Profile Page**.
3. Click the **Payments** tab. A list of outstanding items such as violations or permits will be displayed.

4. **Enable the checkbox** next to each item you wish to include in the payment.
   - **View Item Details**: Click on any item name highlighted in blue to view more detailed information. If you make any changes in the detail view, you must click the **Update** button to save them.
   - **Remove an Item**: To permanently remove an item from the user's account, click the corresponding **Remove** button.

> **Warning:** The **Remove** action is permanent and cannot be undone. Use this with caution, as the item will be completely removed from the user's account, not just the current transaction.

5. After selecting all items, click the **Proceed to Payment** button.
6. On the **Payments Due** screen, review the transaction summary. Select the payment method from the **Payment Type** drop-down menu and click **Submit Payment Information**.
7. A final confirmation screen will appear. Verify that all payment details are correct and click **Confirm Payment Information**.
8. You will be directed to the **Transaction Details** screen. Before finalizing the payment, you have two primary options:
   - **Adjust**: Click to modify the payment total. This is useful for applying a discount or adding a surcharge.
   - **Cancel Transaction**: Click to completely cancel the payment process. The items will remain on the user's account as outstanding.
9. To complete the transaction, click the **Process Manually** button. For credit card transactions with an integrated payment gateway, this

process may occur automatically.

10. Once the payment is accepted, a transaction confirmation number will be displayed. From this screen, you can perform post-payment actions such as making an adjustment or issuing a refund.

Best Practices & Considerations

- **Double-Check Before Confirming**: Always verify the selected items and payment amount with the user before clicking **Confirm Payment Information**, as reversing a transaction is a more involved process.
- **Understand Manual vs. Automatic Processing**: Be aware of how your system is configured. If a payment gateway is active, credit card transactions are typically processed in real-time. Manual processing is used for cash, cheque, or other offline payment methods.
- **Use the Cancel Button to Abort**: If there is any uncertainty or error discovered before final processing, use the **Cancel Transaction** button to safely exit the workflow without financial impact.

User - History Tab

This article explains how OPSCOM administrators can access and manage a user's complete transaction and activity history. The **History** tab provides a detailed log of all financial transactions, permit activity, and system-recorded events associated with a user's account, allowing for audits, adjustments, and user support. This guide is intended for all administrators who manage user accounts.

Setup & Configuration

This is a core feature within the **User Profile Page** and does not require any special setup or configuration.

Using this Feature

The **History** tab is the central location for viewing and interacting with a user's historical data.

Accessing the User History Tab

1. From the main menu, hover over **User Management** and click **User Search**.
2. Search for the desired user using their **name**, **username**, **email**, or **account number**.

3. Click on the user's **username** in the search results to open their **Profile Page**.
4. Hover over the **History** tab.
5. Click on **Recent History** to view the user's activity log.

> The **Recent History** view displays the most recent 100 records for the selected user. This list includes records for items such as **Locker**, **Parking**, **Enforcement Adjustment**, **Address**, and **Mail Records**.

Available Actions & Buttons

The **History** tab provides several options for managing user data and transactions.

- **Adjust:** Click the **Adjust** link next to a processed transaction to modify it. After making changes, click the **Add Adjustment** button to save.
- **Item Number:** Click the link in the **Item Number** column (which may be a permit number, violation ticket number, or appeals record number) to view or edit the details of that specific item. Remember to click **Update/Save Changes** after making any edits on the item's detail page.
- **send email:** Click the **send email** button located next to the 'Current Renter' label to compose and send an email directly to the user associated with that record.

- **Make Payment** or **Processed:** Click this button next to a transaction to view its detailed payment processing information.

Best Practices & Considerations

- **Document all adjustments:** When using the **Adjust** feature, always provide a clear and detailed reason for the modification. This is crucial for maintaining a transparent and accurate audit trail.
- **Review item details before acting:** Before emailing a user or making an adjustment related to a specific item, click the **Item Number** to review its full details. This ensures you have all the necessary context to take appropriate action.

Review Emails Sent to Users

> This article outlines the process for viewing the history of automated and mass communications sent to users through OPSCOM. This feature allows administrators to verify that important messages, such as violation notices and receipts, have been successfully dispatched. This guide is intended for OPSCOM administrators.

Using this Feature

This feature is enabled by default and does not require any specific configuration. It automatically logs communications generated by system tasks and user actions. **Sent Mail History** provides a comprehensive log of all system-generated email communications sent to a specific user.

To access a user's email history:

1. Go to the profile of the user you wish to review.
2. Go to the **History** tab, then **History**, and click on **Sent Mail**.

Key Information Displayed

On the **Sent Mail** page, you will see a list of all communications sent to the user, including:

- **View Email Content**: To view the body of a specific message, click the link in the **Subject** column. A pop-up window will appear, displaying the exact content of the email that was sent to the user.
- The **Subject** of the email.
- The **Date** the email was sent.

The following types of internal and automatic messages are logged in the **Sent Mail** history:

- **New & Overdue Violation Notices**: Emails sent via the **Send New Violation Notices** and **Overdue Violation Notices** system tasks are logged here. The link displays the notice letter as it was generated and sent.
- **Receipts**: When a user completes a payment, an email receipt is dispatched. The history log displays the actual email content, which may have a different layout than the standard receipt view within OPSCOM.
- **Invoices**: Emails containing invoices that were generated and sent to a user are logged and viewable from this page.

Best Practices & Considerations

- When a user reports not receiving an email, **always check the Sent Mail history first** to confirm that the system successfully dispatched the message.
- Use this tool to **verify communications before resending notices or contacting users**, which helps prevent duplicate messages and potential confusion.
- **Note that this history only tracks emails sent directly through OPSCOM's automated systems.** It does not log manual correspondence sent from personal email clients (e.g., Outlook, Gmail).

User - Incident History

> The **User Incident History** page provides a comprehensive list of all disturbance incidents associated with a specific user. This feature allows administrators to quickly review a person's incident history on the premises to understand patterns or retrieve details about past events. This guide is intended for OPSCOM administrators. Incidents can be distributed to various departments, internal or external parties, or even police.

If you are interested in the **Incident Distribution** feature, please refer to this article.

Using this Feature

This page displays data that is logged through the *Dispatch* and *Incident Reporting* modules. For incidents to appear here, they must be correctly created and associated with the user during the incident logging process. No special configuration is required for the User Incident History page itself. To access a user's incident history, first navigate to the profile of the user you wish to review, then select the **Incident History** page to view the list of incidents

Key Information Displayed

Go to any user's profile, and Select the **Incident History** page to view the list of incidents.

The page lists all disturbance incidents the selected user has been involved in. Each entry in the list typically includes:

- Incident ID Number
- Date and Time of the incident
- A brief description or type of incident

Available Actions & Buttons

- **Details**: Each incident in the list has a **Details** button. Clicking this navigates you to the full report for that specific incident, providing all logged information.
- **Add Note Button**: Click the **Add Note** button to add a general note to the user's main profile. This is useful for summarizing patterns or adding follow-up information related to their overall history. (These are only visible on the administration side)
- **Edit/View Images Button**: Click the **Edit/View Images** button to manage the profile pictures associated with this user.

> **Warning:** The accuracy of this page depends entirely on correct data entry. **Ensure that all new incidents are accurately logged** and associated with the correct users to maintain a complete and reliable history. Try to get suspects to identify with a government issues ID if possible.

Best Practices & Considerations

- **Review the User Incident History** before interacting with a user regarding a new complaint or disturbance. This provides the full context of past events and informs your approach.

- **Use the Add Note feature** on this page to summarize recurring issues or document actions taken based on a user's pattern of behavior (e.g., **Spoke with user on 2025-07-18 about repeated noise complaints.**). Notes specific to a single event should be added within that incident's **Details** page.
- The information on this page is critical for identifying repeat issues and making informed decisions about property access or other administrative actions.

User Company Editor

> This article describes how to create, edit, and manage company profiles within OPSCOM. The **User Companies** feature allows administrators to group individual users under a single corporate account, which helps to streamline permit management, billing, and reporting for business clients. This guide is intended for OPSCOM administrators.

Using This Feature

The primary setup step is creating the company profile. Once created, you can associate users with the company and assign specific roles.

To Create a New Company:

1. Go to **User Management** and click **User Companies**.
2. On the **Company Search** page, click the **Create New Company** button to open the **Company Create** window.
3. Fill in the company's information in the provided fields:
   - **Account Number**: A unique internal identifier for the company.
   - **Company Name**: The official name of the business.
   - **Address**: The physical address of the company.
   - **Contact Name**: The primary administrative contact for the company.
   - **Invoice Emails**: The email address where system-generated invoices should be sent.
4. Once all data is entered, click the **Add New Company** button. A confirmation message will appear indicating the company has been added.

After a company is created, you can search for it, manage its associated users, and archive it when it is no longer active.

Searching for a Company and Viewing Users

From the **Company Search** page, you can look up a company by its name or account number. The search results will display the company details and a count of its associated users.

- **Viewing Associated Users**: In the search results list, the number in the **Users** column is a clickable link. Clicking this number will redirect you to the **User Search** page, displaying a filtered list of all users assigned to that company. The list will also indicate which users are designated as the **Manager** or **Billing** contact.

Adding Users to a Company and Assigning Roles

1. Navigate to the profile of the user you wish to add to a company.
2. In the **Company** field, begin typing the company's name and select it from the drop-down list to link the user.
3. Assign roles using the following checkboxes:
    - **Company Manager**: Enable this checkbox to allow the user to access and view the profiles of other people within the same company.
    - **Company Billing Account**: Enable this checkbox to designate the user as the primary contact responsible for the company's payment method. This user can pay for permits and violations for all users they manage.
4. Click **Submit** to save the changes.

Archiving a Company

1. From the **Company Search** page, find the company you wish to archive and click the **Edit** button.
2. On the **Company Edit** screen, click the **Archive** button in the top-right corner.

Best Practices & Considerations

- **Keep in mind:** A company **cannot be archived** if it has any users associated with it. You must first navigate to each user's profile and remove them from the company before the system will allow you to archive it.
- There can only be **one Company Billing Account** contact per company. If you attempt to assign this role to a second user, the system will prevent the change and display a message indicating who the current billing contact is.
- **Tip:** It is recommended to **establish the complete company profile first** before you begin associating users with it. This ensures all foundational details, like the invoice email and account number, are correctly in place from the start.
- The **Company Manager** role is a powerful tool for business-to-business clients, as it allows a primary contact to self-manage their employees' profiles. Be sure to clearly communicate this capability to your corporate contacts.

Bulk User Type Change

> This article describes the Bulk User Type Change tool, which allows administrators to move all users from one user type to another in a single operation. This feature is essential for efficiently managing large-scale user role updates, such as transitioning students to an alumni status at the end of a school year. This guide is intended for OPSCOM administrators

Using this Feature

This tool is a standard administrative feature and does not require any specific configuration. However, you must ensure that both the original user type (the one you are changing from) and the destination user type (the one you are changing to) are already created in the system. The tool provides a simple interface for selecting a user type and migrating all of its members to a different type.

For more information on creating and managing roles, please refer to the *User Types Administration* wiki article.

To Perform a Bulk User Type Change:

1. Go to **User Management** and click **Bulk Type Change**.
2. The **Bulk User Type Change** screen will display a list of all existing user types. Next to each name, a number badge indicates the current count of users assigned to that type.
3. Locate the user type you wish to change *from*.

4. In the drop-down menu next to it, select the new user type you want to move the users *to*.
5. Click the **Save Changes** button.
6. A final confirmation prompt will appear. To proceed, click the **Confirm Changes** button.
7. The system will process the update. Once complete, the page will refresh, and you can verify the change by reviewing the updated user counts for the affected user types.

> **Warning:** This action is permanent and **cannot be undone**. It will immediately move **all** users from the original type to the new one. Always double-check your selections before clicking the final **Confirm Changes** button.

Best Practices & Considerations

- **Changing a user's type directly impacts their permissions and access**, including their eligibility for specific permits, lots, and waitlists. Before performing a bulk change, ensure the destination user type has all the correct permissions and rules configured.
- **Use this tool for major seasonal or annual transitions**, such as updating student statuses at the end of a semester or moving all members of a deprecated group to a new, active one.
- For user types with a very large number of users (thousands), the process may take a few moments to complete. **Do not navigate away from the page** after clicking **Confirm Changes**; wait for the process to finish and the page to reload.

Merge User

> This article describes how to use the Merge Users tool to combine two separate user profiles into a single, primary account. This function is essential for maintaining a clean database by resolving duplicate profiles that may arise from user error, name changes, or other data discrepancies. This guide is intended for OPSCOM administrators.

Setup & Configuration

Before a user profile can be selected in the Merge Users tool, you must ensure it meets the following criteria within its profile settings:

- The user account must be **Enabled**.
- The user must have a **User Type** assigned.

If you cannot find a user when searching in the merge tool, first navigate to that user's profile to verify these two settings are correctly configured.

Using this Feature

The merge process involves selecting a source profile (**FROM User**) to merge into a destination profile (**TO User**). The FROM User will be archived, and its data will be transferred to the TO User.

The Merge Process

1. Go to **User Management** and click **Merge Users**.
2. The page displays two search sections:
    - The profile on the **left** is the source account that will be merged and then archived (**FROM User**).

- The profile on the **right** is the destination account that will remain active (**TO User**).

3. Use the search fields in both sections to locate the two user profiles. You can search by name, email address, student number, or employee number.
4. Select the correct user profile from the search results in each section.
5. Click the **Merge** button to proceed.
6. A confirmation screen will appear, showing which user will be merged into the other. To finalize the action, click **Merge** again.
7. After the process is complete, a confirmation message will appear at the bottom of the page.

> Data is only transferred from the ***'FROM User'*** if a corresponding record does not already exist on the ***'TO User'***. The merge tool does not overwrite or duplicate existing records on the destination profile.

What Happens to the Data?

- The **FROM User** (left column) profile is permanently archived and is no longer accessible.
- The **TO User** (right column) profile remains active and inherits the data listed below.
- A record of the merge is logged in the **Completed History** section on the profile of the **TO User**.

The following data is transferred from the FROM User to the TO User:

- Vehicles

- Violations
- Permits
- Lockers
- Items Awaiting Payment

> **Warning:** The merge process is **irreversible** and results in the permanent archival of the **FROM User** profile. Always double-check that you have selected the correct source and destination accounts before finalizing the merge.

Best Practices & Considerations

- **Designate the profile with the most accurate core information as the TO User** (the account on the right). While transactional data is transferred, the primary profile details (name, contact information) of the TO User are what the final, merged profile will retain.
- **Use this tool to resolve common data integrity issues**, such as when a user accidentally creates a second profile, changes their legal name and creates a new account, or when an admin-created profile needs to be consolidated with a user-created one.

Bulk Email Users

> This article describes how to use the Email Users tool to send mass email communications. This feature allows administrators to compose and send messages to targeted groups of users based on criteria like user type, permit status, or assigned parking lot. This guide is intended for OPSCOM administrators responsible for user communications.

Using this Feature

This tool is a standard feature and does not require any specific setup. The effectiveness of the recipient filtering depends on having accurate and up-to-date user data, including correct *User Types*, *Lot Assignments*, and other user profile details. The process is divided into two phases: first defining your recipient list using filters, and then composing and sending the email.

Defining the Recipient List

1. Go to **User Management** and click **Email Users**.
2. On the **Email Users** page, begin by selecting a primary group from the **User Type Group** drop-down menu.
3. Next, refine your recipient list by selecting one or more filters from the available options:
    - **Filter by**: Narrow the list by user status (e.g., *Has Active Permit*, *Is on a Waitlist*).
    - **Select by Lot**: Target users assigned to specific parking lots.
    - **Select by Locker Area**: Target users with lockers in specific areas.

4. Once your filters are chosen, click the **Prepare Email** button. This action generates the final recipient list based on your criteria and reveals the email composition tools.

> **Tip:** To select multiple options within a single filter box (e.g., to email users in three different lots), hold the **Ctrl** key (or **Cmd** on Mac) and click each desired option. To deselect an option, hold the same key and click it again.

Composing and Sending the Email

After preparing the email, a new section will appear on the page.

1. First, **verify your recipients**. Click the **View Recipient List** button to review the list of users who will receive the email. You can also click **Export Recipient List** to download a CSV file for external review.
2. Compose your message by filling in the **Subject** and **Message** fields.
3. To include a file, click the **Choose File** button and select the desired attachment.
4. When your message is ready, click the **Send Email** button.
5. A confirmation prompt will appear. Click **Yes** to proceed.
6. A confirmation message will then display, stating that the email has been queued for delivery.

> **Warning:** Sending a mass email is an **irreversible action**. Always proofread your subject line and message content carefully for accuracy and clarity before clicking **Send Email**.

Best Practices & Considerations

- **Always use the View Recipient List button** to check your final list of recipients before sending. This is a critical step to ensure your communication reaches the correct audience.
- Be aware that emails are **queued for delivery** and may not be sent instantaneously, especially for very large recipient lists. The system sends them in batches to ensure reliable delivery.
- Use this tool for important operational announcements, such as lot closures, policy changes, or permit renewal deadlines. Avoid overusing it for non-essential matters to prevent 'email fatigue' among your users.
- You can view emails sent successfully to a user by navigating to their profile and going to **History > History > Sent Mail**, or by accessing the **Complete History Log**. This will display the emails sent to that specific user.

Generate Mail Merge

> This article explains how to use the **Generate Mail Merge** tool to export user mailing addresses for Microsoft Word's Mail Merge feature. This guide is intended for OPSCOM administrators managing user communications.

Using this Feature

This tool is designed to be used in conjunction with Microsoft Word's Mail Merge functionality. No additional configuration is required beyond having access to the appropriate Microsoft software.

> **Warning:** In databases with a large volume of records, this tool may not function as expected. If you encounter issues, please contact OPSCOM Support for assistance.

Generating the CSV File for Export

1. Go to **User Management**, and click **Generate Mail Merge**.
2. This action generates the mailing list based on your total user records.
3. Click **CSV** for the file export.

Composing and Initiating the Mail Merge

After downloading the file, open Microsoft Word.

> **Note:** Depending on your version of Microsoft Word, the instructions below may differ.

Please refer to the official Microsoft Mail Merge documentation for more details.

Best Practices & Considerations

- The tool exports **all user records** from your database. Filtering options are not currently available.
- Always review the exported CSV for accuracy before proceeding.