

Permit Search

This article describes the Permit Search tool, a central hub for finding, managing, and reporting on all parking permits. Its primary purpose is to provide administrators with detailed search capabilities and a suite of actions for managing permit visibility, user assignments, and communications. This guide is intended for OPSCOM administrators.

Using this Feature

This tool is a standard administrative feature and does not require any specific configuration. It utilizes the existing permit and user data within the system. The Permit Search page allows you to find specific groups of permits and then perform a variety of bulk and individual management actions.

Performing a Permit Search

1. Go to **Permit Management** and click **Permit Search**.
2. Enter your desired criteria in the search fields.
3. Optionally, enable the **Archived Permit Data** or **Include Only Active Permits** checkboxes to refine your search.
4. Click the **Toggle More Options** button to reveal additional search filters that can be pinned to your default view.
5. Click the **Retrieve** button to generate the results.

Understanding the Permit Counts Legend

At the top of the search results, a legend provides a quick overview of the permits found:

- **Total:** Total number of permits found by your search criteria.
- **Requested:** A user is associated with the permit, but no payment has been initiated.
- **Rented/Reserved:** A payment is associated with the permit, but it may not be fully processed yet.
- **Visible To User:** The permit is available for purchase and has no user associated with it.
- **Visible to Admins:** The permit is hidden from users and has no user associated with it.
- **Unavailable:** The permit's state is not set to Good, Valid, or Usable.

Performing Bulk Actions and Reports

- From the drop-down menu at the top of the results, select a report or action to apply to all permits in the list.
- Click the **Perform Selected Action** button to proceed.
- Available actions include: **Generate Mailing List, Generate User Usage Report, Send Email to Permit Users, Generate Status Report,** and **Generate Permits for Printing.**

Managing Individual Permits in the Results List

- **Permit Number:** Click the link in this column to open the **Parking Permit Information** screen, where you can manage the **Permit State** and view associated user and payment details.
- **Clock Icon (History):** Click this icon to view the permit's complete transaction and user rental history.

- **Reserved/Rented:** Click the user's name in this column to view their details, with links to their profile or to send an email.
 - **Toggle Availability:** Use the checkbox in this column to control if a permit is visible to users for purchase. Use the **Mark all Available** or **Mark all Not Available** buttons for bulk changes, then click **Update Records** to save.
 - **Release:** Click this link to disassociate the permit from its current user, making it available for resale.
 - **Switch:** Click this link to change the permit number associated with the current user.
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Best Practices & Considerations

- **Releasing a permit does not automatically refund the user.** This action only disassociates the permit from the user. If a refund is required, you must also perform a separate *financial adjustment*.
 - **Understand the difference between permit statuses:** **Requested** means a user has selected an item but has not yet chosen a payment method. **Reserved** means there is an associated unprocessed payment (promise to pay, e.g., cheque). **Rented** means the payment is processed.
 - **Use the Toggle More Options button to pin frequently used search filters** to your default view. This saves time and customizes the search page to your workflow.
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