

# Training Agenda

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# System Messaging Checklist

## What Needs Your Attention

Here is the list of all the major pages and messaging you will want to review. There are some that are standard messages and probably don't need customization. These items are listed but marked as optional.

Functional page elements are displayed on the page automatically by the system based on which page you are currently on. For example, the Sign In page boxes that appear for username and password are automatically generated on the page. Therefore, you need not worry about editing these items. However, if you want to add additional content on these pages you may do so.

## Templates and Designs

Click on Toggle template to get a list.

You will want to edit the following:

- Header - You will want to customize this content. This is the common header on all user portal pages.
- Footer - You will want to customize this content. This is the common footer on all user portal pages.

Go into System Messaging and update the following System Messaging:

(These are the actual pages that occupy the content area between the header and footer that you configured above)

## The Pages Tab

- User Dashboard - Currently the generic page. You will want to customize this content.
- Login Screen - You will want to customize this content.
- Payments Page - Optional. This content will appear on the Payments page above the functional part of the page.

- Permits - Most clients customize this message. A good place to put a Campus Map and Messaging about permits.
- User Registration- Optional.
- My Vehicles - Optional.

## The Messages Tab

- Dashboard Message - Admin Dashboard.
- noPaymentOptions - Currently a standard generic message. Edits Optional.
- permitPDF - Set for printing a standard permit.
- permitTempPDF - Set for printing a temporary permit.
- tempPermitText - Optional.

## Popup Disclaimers

You may opt to place popup disclaimers throughout the system. These popup windows can be triggered to appear based on navigation to a page or associated with a button on a page.

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

### Email Headers and Footers Configuration

These are the common elements that will be used for all outgoing emails.

You will probably want to customize the messages as well as add your logo to the header, although there are no rules here you can decide, for example, to put the logo in the footer.

Click on toggle templates and have a look at:

- Header - You will want to customize this content.
- Footer - You will want to customize this content.

## Email Templates

These are the ones I believe you will be using at this point.

- Appeal Decision
- Appeal Submitted - Standard. Edits Optional.
- Lost Password - Standard. Edits Optional.
- Create Password registration email. - Standard. Edits Optional.
- User Receipt - Standard. Edits Optional.
- Waitlist Selected - Standard. Edits Optional.

# Disclaimers & Messaging

There are only 2 that would be of concern.

- Payment Footer
- Receipt Header

# Notice Literature

These are notices that get sent out to end users as an email. They would use the Headers and Footers you configured above.

- Overdue Notice Literature - sent to a user when they have an overdue violation. You will want to customize this message.
- New Notice Literature - sent to a user when they have received a violation. You will want to customize this message.

# Module 1 - OPS-COM System Setup

There are several items on the New Client Orientation and Rollout tasks checklist that you should read through before proceeding. Please review sections 1 - 3.

It is important that you set up your final configurations on your production system. The preview system is for testing and the information created here is temporary.

## System Config

### 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. Users can be assigned multiple roles.

### 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. To manage your Admin Accounts please see Managing Admin User Accounts.

### Setting Up UserTypes

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.

# Setting up the Admin Options

Many of the Admin Options control your picklists for different options.

## Setting up ViolationAdmin Options

If you have purchased ViolationAdmin then you will need to set up your Ticket Types. Ticket Types are used to distinguish what type of Violation/ticket is being issued. You will also need to set up your Offence Types. Fine amounts are set and the discount for each offence is administered here.

## System Settings Customization.

## Email Template Setup

Email Templates that are created for communications with your clients are stored in this area in OPS-COM. Currently, you can edit the look and feel. In the future, you will be able to set up your own email templates.

## Invoicing Template Setup

OPS-COM will allow you to prepare/send invoices for permit purchases. The Invoicing feature is used to simplify the monthly billing/invoicing process for bulk payment of permit purchases.

## Setting up the Communication/Landing Page for Admins

When initially logging onto OperationsCommander as an administrator, the first landing page you are presented with has a message window that can be edited to suit your specific needs. General information can be placed here. Many OPS-COM users place schedule information on this landing page as well.

# Module 2 - User Management

Users and their profile information form the backbone of the OPS-COM software. They link all modules together and allow you to have a complete history of everything about that user and associated vehicle.

You can Add, Edit and Search for Users. You can also buy Lockers and Permits and pay for Violations through the User Profile. Merge tools and bulk email filters that allow you to reach out to your users are also available in this module.

## Quick registration

This is the area that you will need when adding a User to the system. Admins can manually add users or users can be asked to log in to the User Portal to create and manage their account. When using this registration form, you will be able to assign the appropriate user type and input all other relevant information.

## User side Registration

For information about User Registration through the User Portal refer to Registering as a New User.

## Working with Existing Users

You must search for Users before you can work with them. Once you have found a user you want to work with you click on their username in the search results. This will bring you to the user profile landing page. This is a quick reference dashboard of the user's profile information and current user history.

From the User Profile Landing Page you can:

Edit a user profile - This is also where Admins can set up Tax Exemption information, add/edit stored credit cards, and edit payment subscriptions for a user.

View and edit associated vehicles - This allows administrators to add, edit and remove vehicles associated to a user. This is also where administrators would add/remove DNTT (Do Not Ticket or Tow) information to a vehicle.

View outstanding Violations

View active Permits

You will notice many tabs across the top of the screen. These are used to manage all aspects of the User Profile. From this page you can:

Manage Lockers for that User - You can purchase lockers for a particular user on this tab.

Purchase parking permits for that user. This includes temporary permits and access cards. You can also sell prorated permits here.

Manage Payments - 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. We will look in depth on adjustments and payments in module 8.

View User History - view/edit all transactions and adjustments (locker reservations/rentals, permit reservations/payments, violations/payments, appeals/payments, DNTT records and email records) on a user's account. You can also view the complete History of a user which is a system log of user transactions. If you have the IncidentAdmin module you will also be able to view/edit any incident history associated with a user.

## Merging Users and Vehicles

The Merge Users option is used to combine two profiles for the same person into one user profile. You may require this function if:

- Person created profile in error
- Person gets married and changes their name.
- Person Profile does not match Admin created profile.

The Merge Vehicles option is used to combine two vehicles into one. It can also be used when a Vehicle has outstanding violations and a User has added the vehicle (with violations) to their account. This will associate the vehicle to the User and bring along all the violation history to the User.



# Using Bulk Email to Communicate with Users

If you would like to target your email to a specific group, there are many options available in the More... menu. You can also export the 'Consented Report' to allow you to see all users that have given you consent to contact them by email.

## Using the Forms Module

If you have purchased the Forms module you can use it to allow users to communicate with the organization about special requests. Some examples of forms used by organizations include:

- University move in/move out
- Special Parking Requests

Administrators have the ability to create custom forms to request the information they need.