

# 511 RideMatch Service

## Process Guide for SysAdmins

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## **PROCESS GUIDE OVERVIEW**

This document describes activities associated with the 511 RideMatch Service (RMS) SysAdmin role. This document is an Appendix (“Appendix B”) to the Standard Operating Procedures (SOP) for the 511 Regional Rideshare Program’s Information Technology (IT) Department. Refer to the SOP to get a broad overview and description of the RMS’ functionality.

### **511 RIDEMATCH SERVICE (RMS)**

The 511 RideMatch Service (RMS) is a self-serve Internet-based ridematching system that gives end-users the power to customize their searches for sharing a carpool or vanpool to work and logging commutes in the trip diary to earn rewards. The RMS provides a secure login to a confidential database that has a self-cleaning mechanism to ensure those appearing on matchlists current. The system is available at (<https://www.ridematch.511.org> or <https://ridematch.511.org>). On-line match profiles are available 24-hours a day, 365 days a year and provide visual mapping.

### **SYSTEM ADMINISTRATORS (SYSADMIN) DESCRIPTION**

The SysAdmin can change anything in the database and use all modules including skin creation, county and employer benefits, special event creation and communications administration. SysAdmin access is intended for the IT staff and system developers. The 511 RRP IT Manager grants SysAdmin access as appropriate.

The SysAdmin is one of four administrative levels in the online RMS system. For current listing of administrators and their associated levels, see the RMS Admin Access Report available through the built-in reporting system and viewable by SysAdmins.

SysAdmins can also do the following tasks:

- Add, delete, or change any commuter record, including elevate records for administrative access.
- Manage and create company locations
- Manage/create/delete Vanpools and associate registrants as Vanpool Drivers within the Vanpool Module
- Manage/create Commuter Benefits
- Manage/create Skin Sites
- Manage/Create Employer Challenges

See the IT SOP for descriptions of the other levels of RMS administrative access.

To get access to the RMS, the SysAdmin must be registered in the RMS.

## ADMINISTRATIVE ACTIVITIES

The SysAdmin is able to perform tasks in several functional areas within the Admin Activities Module of the RMS. The areas are:

1. Rideshare (commuter records)
2. Employer
3. Vanpool
4. Site Administration (Customized Sites and Benefits/Incentives)
5. Incentive and Rewards Tracking
6. Communication

Individuals with SysAdmin access are able access the various components of the Admin Access Module from the Rideshare webpage. Click on the green button that says “Admin Activities” and the list of functional areas will appear.

The screenshot shows the 511 SF Bay Rideshare website interface. At the top, there is a navigation bar with links for 511.ORG, TRANSIT, TRAFFIC, RIDESHARE (highlighted in green), BICYCLING, and PARKING. Below this is a secondary navigation bar with links for Rideshare Home, Carpool, Vanpool, Benefits, and For Employers. A third navigation bar contains links for Home, Edit Profile, Find Ridematches, Trip Diary, Admin Activities (highlighted in green and pointed to by a red arrow), Reports, and Log Out. The main content area features a welcome message and several service tiles: Find RideMatches, Edit Profile, Trip Diary, Log In with Facebook, and Trip Diary Tutorial. A promotional banner for 'Pets, Coffee & Tea' is also visible. On the right side, there are partial views of sections for Employer Ch, Commuter B, and Commuter In.



Admin Activities

The Administration Activities assigned to you are displayed below. Please click on the 'Continue' link next to each activity to access the corresponding activity. To return to this page simply click on the 'Admin Activities' button on top.

Rideshare Admin

Rideshare Administration allows you to search and/or add commuters, update their profiles, and perform

[Continue >>](#)

Employer Administration

Employer Administration allows you to search and/or add employers, employer locations, update the locations, and clean-up employer database.

[Continue >>](#)

Vanpool Administration

Vanpool Administration allows you to search, add, and/or update vanpools, manage vanpool members and their profiles.

[Continue >>](#)

Site Administration

Site Administration allows you to search, add, and/or update skinned sites and manage their look and feels.

[Continue >>](#)

Special Events Administration

Special Events Administration allows you to search, add, and/or update special events and event locations.

[Continue >>](#)

Incentives / Rewards Tracking

Incentives Tracking allows you to search, add, and/or update incentives and promote the incentives for commuters.

[Continue >>](#)

Communication Administration

Communication Admin

[Continue >>](#)

Rideshare Admin

Rideshare Admin

Rideshare Administration allows you to search and/or add commuters, update their profiles, and perform

[Continue >>](#)

Most tasks that are performed in this Admin area are described in the Commuter Services Department (CSD) SOP and are performed by registrants who have RSAdmin access.

However, SysAdmins are solely able to the change the administrative access level for registrants in two ways:

1. **Access Type:** Assign “Admin Access” level (defines the degree of access that an individual has to different components of the RMS)
2. **Access Site:** Associate the commuter to a particular “Customized Site”

### Employer Administration

**Employer Administration**

Employer Administration allows you to search and/or add employers, employer locations, update the locations, and clean-up employer database. [Continue >>](#)

The Employer Administration component allows SysAdmins to search and add employers, employer locations, update worksite locations, and “clean up” the employer data associated with individual registrants. The component also includes a search tool for identifying employers participating in commute challenges. Additionally, the CSD Department runs a daily report of newly added employers and uses this module to manage them. See Appendix J for Employer Administration procedures.

### Vanpool Administration

**Vanpool Administration**

Vanpool Administration allows you to search, add, and/or update vanpools, manage vanpool members and their profiles. [Continue >>](#)

Both SysAdmins and VP Admins are able to manage vanpool-related data associated with some RMS registrants. These tasks are described in Vanpool Department’s SOP.

### Site Administration (Customized Sites and Benefits/Incentives)

**Site Administration**

Site Administration allows you to search, add, and/or update skinned sites and manage their look and feels. [Continue >>](#)

The Site Administration Module allows SysAdmins to do the following tasks:

1. **Manage Sites** – Allows SysAdmins to create and modify Customized RMS websites (“skinning”). Guidelines for creating modifying customized sites are described in Appendix E. This appendix also include the MOU documents that are required to implement customized sites (these documents are also posted online at <http://511.org/developer-resources.asp>. For a listing of customized sites see Appendix F. Customized sites could be developed for employers, public agencies

or other entities. Steps for creating or modifying customized sites are described below:

Click “Add Site” to create a new customized RMS site. Please note that customized sites for Employers cannot be added until a MOU has been signed by the employer, and the appearance of the customized site is agreed upon between the Employer and RRP.

The screenshot shows a web interface with two tabs: "Manage Sites" (selected) and "Commuter Benefits". Below the tabs is a "Site Information" section. It contains the following fields and text:

- ID Site:** A dropdown menu showing "Not Assigned".
- Create Date:** A text field showing "09/24/2013".
- Site Name:** A text input field with a green instruction: "Enter employer or organization name below." and a blue example: "(eg: County of Marin)".
- Client Name:** A text input field with a green instruction: "Enter alias name below for the site. This will become the part of URL for the site." and a blue example: "(eg: marin)".

At the bottom of the form, there is a red asterisk label "\* Required Fields" and two blue buttons: "<< Return to Search" and "Continue >>".

Enter a “Site Name” and a “Client Name” (note the text for the field names on this page should be reversed). The Client Name is arbitrary and is not seen by the public. The Site Name is part of the url:

[https://www.ridematch.511.org/?client=\[site name\]](https://www.ridematch.511.org/?client=[site name]).

The “Site Look & Feel Manager” allows a 993x98 pixel header to be uploaded to the customized site and to change menu, section bars, and page background colors.

**SITE LOOK & FEEL MANAGER**

Site Id: 10001  
 Site Name: 511 SF Bay Area  
 Site URL: https://www.ridematch.511.org/?client=511.org

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**Site Logo**

To update the logo, select the image using 'Browse' button, click on the 'Upload Image' button and then click on the 'Update Site' button at the bottom. Image size must be 993x98 pixels for better resolution.

Select Image:

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**Site Color Scheme**

Click on the color box below and then either update the color hex code or pick the color from the widget on the right hand side.

Page Background Color: #DDE0D1

Header Background Color: #FFFFFF

Menu Bar Background Color: #FFFFFF

Menu Buttons Color: url(/images/ir)

Section Background Color: #FFFFFF

---

**Site Text Colors**

Select the text color options below.

Header Text Color:

Menu Buttons Text Color:

Section Text Color:

---

**Standard Gray Bars**

Set the following features to the 511 default gray color. This will override color settings made above.

Menu Bars Background:

Section Background:

\* Required Fields

The “Search Site” function allows the SysAdmin to search for an existing site (use % as a “wildcard” to find all existing sites or enter Site ID, Site Name, or Client name. See Appendix F for a list of existing customized site names.

**Manage Sites** **Commuter Benefits**

You may manage employer sites by searching the database.

- To search a site - enter the information below and click on the 'Search Site' button.
- To add a new site - click on the 'Add Site' button.

Site Id:

Site Name:

Client Name:

**Manage Sites** **Commuter Benefits**

| Select                           | Site ID | Site Name       | Client Name |
|----------------------------------|---------|-----------------|-------------|
| <input checked="" type="radio"/> | 10001   | 511 SF Bay Area | 511.org     |

Select the site and click “Manage Site” to change its graphic elements.

- Commuter Benefits & Incentives – Benefits and incentives that are available to individual RMS registrants appear on the commuter’s home page. They are configured to match the commuter’s home or work county, the commuter’s employer, and/or the customized site the commuter is associated with.

Manage Sites | **Commuter Benefits**

You may manage Commuter Benefits by searching the database.

- To search a benefit - enter the information below and click on the 'Search Benefit' button.
- To add a new benefit - click on the 'Add Benefit' button.

Benefit Id:

Benefit Scope: \*

Benefit Status:

[Add Benefit >>](#) [Search Benefit >>](#)

“Add Benefit” allows the SysAdmin to create the benefit type.

Manage Sites | **Commuter Benefits**

Benefit Id: Not Assigned

Benefit Scope:  Please select one \*

Benefit Status:  Please select one \*

Benefit Description:

\* Required Fields [<< Return To Search](#) [Create Benefit >>](#)

“Search Benefit” returns a list of existing benefits that can be modified by the SysAdmin.

Manage Sites | **Commuter Benefits**

| Select                           | Id    | Benefit Location | Description  | Status |
|----------------------------------|-------|------------------|--|--------|
| <input checked="" type="radio"/> | 10001 | Alameda          | Guaranteed Ride Home Program   | A      |
| <input type="radio"/>            | 10002 | Alameda          | Contact: Alameda County CMA - 510-433-0320 or <a href="http://www.grh.accma.ca.gov">www.grh.accma.ca.gov</a> | C      |
| <input type="radio"/>            | 10066 | Contra Costa     | Drive Less Commuter Incentive Program  | A      |

[<< Return to Search](#) [Manage Benefit >>](#)

### Special Events Administration (Currently turned off)

**Special Events Administration**

Special Events Administration allows you to search, add, and/or update special events and event locations.

[Continue >>](#)

The special events module enables users/commuters to match with other users for the purpose of forming carpool to unique events in the greater Bay Area Region. The module was never utilized much and management resourced were extensive. Currently the Event Matching module has been turned off and is not available for use to the public.

### **Incentive / Rewards Tracking**



The Incentive module has three functionalities to manage information displayed in the RMS about 511 Rideshare incentive programs. The “Manage Incentives” tab allows creation and management of promo text displayed on the home page. The “Frequent Commuter” tab is a report to data mine the RMS Trip Diary based on frequency of mode usage. The “Random Winners” tab manages the Random Winners campaign. See the Marketing SOP for more details.

### **Communication Administration (Currently turned off)**



The Communications Module was intended to allow the Marketing team and/or other RSAdmins to have the RMS system send a mass email to specific RMS commuter groups. The marketing team did not want to use it because it doesn’t track email “opens” like their current tools, and usage rules and guidelines were never developed for RSAdmins in fear of system misuse. Therefore the Communications Module is not used and is currently hidden from RSAdmins.

### **EMPLOYER CHALLENGE CREATION**

From time to time, employers ask 511 Rideshare to provide a Trip Diary tool to support Commuter or Employer Challenges; that is, competitions between employees to track the most “green” trips. During the competition and at its conclusion, employers want to track individual and aggregate progress in terms of vehicle miles traveled (VMT), emissions reductions, and other metrics.

Employer Challenges are added to the 511 RideMatch Service database using the SQL Manager for Postgres tool. A new challenge is created by adding a new record to the database table “XXXXXXXXXX.” Additionally, this is where one enables or removes a challenge from being displayed by changing the “Status” flag; status “A” means the challenge is active and status “I” means the challenge is inactive.

## **PROMO CODE CREATION**

From time to time, the 511 Rideshare Marketing Department will request the creation of promo codes as a tracking tool for marketing campaigns. Promo codes are used by 511 Rideshare so the source of a new registrations can be identified. For example, a flyer or other item of campaign collateral can direct potential registrants to use a particular promo code when registering to win a prize. It is important to note, that although the Marketing team stipulates what the promo code text is, it is imperative that the promo code is created before marketing promotes it.

Promo codes are created in the database using the SQL Manager for Postgres tool. The database table "██████████" is altered to add a new promo code. The information needed is PR Code, Date Start, and Date End. If the date fields are left Null, the code will always be active.

## **REPORTS**

RMS Reports summarize database fields and provide some calculations using data points. Over the years, many reports have been developed to meet the needs of 511 Rideshare's different departments.

Access to individual reports depends on the administrative access level. All reports are available to SysAdmins. See RMS Reports Document (Appendix C) for a list of current reports.

### **Creation of New Reports**

New reports are developed on an as-needed basis, depending on 511 Rideshare department needs. In general, the IT Manager works with the RMS subconsultant (MediaBeef) to do the database programming that would be required.

However, there are two activities related to reports that are performed by the SysAdmin.

### **Database Dump (export)**

Every month, the Evaluation Department uses a database "dump" to run their own reports (occasionally, other departments find it of use also). The SysAdmin runs this export every month.

Performing the following steps in the SQL Manager for Postgres tool the IT Manager runs a query on the pre-defined view called "██████████" to create the monthly database dump file.

- Click on 'Tools' >> 'New SQL Editor'
- Type "Select \* from ██████████;"
- Select/highlight the query and hit 'F9'.

- Click on 'Export Data' in the side pane and select csv as the file type.
- Convert the .csv file to a .xlsx file.

The following fields are included in this export:

"Commuter Id",  
"E-mail",  
"First Name",  
"Last Name",  
"Created By",  
"Created By Type",  
"Last Updated By",  
"Date Created",  
"Date Activated",  
"Date Last Updated",  
"Date Last Login",  
"Status",  
"Admin Type",  
"Home Street",  
"Apt#",  
"Home City",  
"Home State",  
"Home Zip",  
"Home County",  
"Home Phone",  
"Work Phone",  
"Cell Phone",  
"Employer Name",  
"Work Street",  
"Suite",  
"Work City",  
"Work State",  
"Work Zip",  
"Work County",  
"Match Preference",  
"Carpool Preference",  
"Vanpool Preference",  
"Bike-Buddy Preference",  
"Commute Mode",  
"Vanpool Participant",  
"Promo Code"

### Modification to RMS Reports

Some of the RMS reports include 511 Rideshare staff members as a field. These reports require modification when there are staff changes. The SysAdmin can make these changes.

The CSD-RMS Activity and Vanpool Activity report can be modified when staff changes.

- See (Appendix H) for CSD-RMS Activity report modification procedures
- See (Appendix I) for Vanpool Activity report modification procedures

### IT PASSWORD DATABASE

All passwords are stored in a [REDACTED]

[REDACTED] The password to open the file is known by the IT Manager (Jon Eastlund), IT Assistant (Gina Arias) and the Operations Manager (Lauren Isaac).

### APPENDIX – REFERENCE DOCUMENTS

For security reasons and frequency of updates the following documents are kept out of this SOP and maintained in the following locations.

| Letter | Document  | File Name/Location  |
|--------|---|---|
| A      | Password Database File                              | [REDACTED]  |
| B      | Process Guide for SysAdmins                         | This document   |
| C      | RMS Reports   | R:\Common\RMS\Report_Listing\RMS_Reports.pdf  |
| E      | Customized RMS Website Guidelines and MOU documents | R:\Information_Technology\RMS \Skinning_Documents\Custom 511 RMS Guidelines.pdf<br>R:\Information_Technology\RMS \Skinning_Documents\MOU for Customization and Admin Access.doc |
| F      | Custom RMS Website Listing                          | R:\Common\RMS\Skin_Site_Listing\RMS_Skin_Site_Listing.xlsx  |
| H      | Modify CSD_RMS Activity Report                      | R:\Information_Technology\RMS\Programming\Modify CSD-RMS Activity report\CSM_RMS Change Instructions.docx   |
| I      | Modify Vanpool Activity Report                      | R:\Information_Technology\RMS\Programming\ Modify Vanpool Activity report   |
| J      | Employer Administration Procedures                  | R:\Information_Technology\RMS\Process Guides\SysAdmin Process Guide Appendix\Employer Administration Procedures.docx  |
| K      |   |   |
| L      |   |   |
| M      |   |   |

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