

Chapter 3: Populating Your Network

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In setting up your Organization/Employer, University, Program or Division, or Worksite network in Chapter 2, you chose one or more among three ways (private email address, passcode, and administrator-approved request, depending on the network) that you can help users join your network. This chapter expands upon those and describes others.

This chapter describes in detail four processes that administrators can utilize to help users join the *SmartRideshare* system: pre-enrolling accounts by using bulk import, creating a new account on behalf of an individual through proxy registration, approving requests to join, and issuing passcodes. (A fifth, the process of connecting a private email domain with your network, is complete upon setting up your network.) One or more of these processes is available to Organization/Employer, University, Program, Worksite, Division, and School networks, but not all of these networks allow all of the processes.

In addition, when users join an *SmartRideshare* network, the system will also automatically associate them with higher-level networks on the basis of information the user inputs during registration or updates later. These include—depending on how agencies, counties, cities, and TMAs have set up their networks—location/designation (state, zip code, city, work and/or home address), a geographically defined boundary, and wirewrap.

Different Methods for Helping Users Join Your Network

The following four processes are detailed in this chapter. These are the ones that, as an administrator of an Organization/Employer, University, Program, Worksite, Division, or School network, you will use. Note that it is common for administrators to employ a combination of these strategies to help users join the appropriate networks. For an overview, see the table below.

1. **Import accounts:** *Bulk import* is a process by which you may import a file of employee names, phone numbers, and email addresses into the *SmartRideshare* system in order to pre-enroll employee accounts. Once the import process is complete, employees receive an email with a validation link and temporary password, to which they must respond within seven days to complete the enrollment process. This process is available to administrators of Organization/Employer, University, Program, Worksite, and School networks.

2. **Proxy registration:** The administrator creates an account with a network on behalf of the user. This process is available to administrators of Organization/Employer, University, Program, Worksite, Division, and School networks. It is also available to administrators of higher level networks, should you need their help.
3. **Administrator approval:** You may set up a network so that administrator approval is required before a user can join the network. Administrators review and approve each membership request individually. You select this process for your network when you initially set up your network (see Chapter 2). Users may join Organization, University, Program, and School networks in this manner.
4. **Passcode:** You may devise a confidential code and provide it to prospective network members to allow them to sign up with a particular *SmartRideshare* system network. Passcodes are one way to allow people to join a network if they do not use an email address with the private *domain name* that you have assigned to the network. You select the passcode for your network when you initially set up your network (see Chapter 2). Users may join Organization, University, Program, and School networks in this manner.

One other process for network membership is in the administrator's control, but its configuration is completed when you initially establish your network. It is discussed in detail in Chapter 2:

5. **Email domain:** You may assign one or a few private *email domain* names to a particular network. On the basis of the domain name that users input as part of their email address during registration, the system associates them with that network. Users can join Organization, University, and School networks in this manner.

The remaining processes for network membership are not discussed further in this chapter because you are not responsible for managing them. Either the user makes a selection (user association with a Division network) or the *SmartRideshare* system utilizes information input by users to automatically associate them with a network (location/designation, geographically defined boundary, wirewrap).

6. **User association:** If users register with a network that has established Divisions, they will be invited to select a Division from a drop-down menu. Users can also join a Division network by going to **Profile** in the menu bar, selecting **My Networks**, choosing **Join a Network**, searching for the network, and then clicking **Select**.
7. **Location/designation:** While registering, the user types in a work and/or home address. The *SmartRideshare* system associates them with the network on the basis of the user's specified state, city, or zip code (work or home). This association method applies to State, Regional, County, Jurisdiction, and TMA networks. The system also associates users to Worksite networks on the basis of their worksite address (plus users' explicit selection of a Worksite network).
8. **Geographically defined boundary:** While registering, the user types in a work and/or home address. The *SmartRideshare* system associates them with the network on the

basis of a customized geographic-based boundary (created by *SmartRideshare*) that can encompass non-incorporated areas or pieces of adjacent cities/counties as appropriate. This association method applies to Jurisdiction and TMA networks. The Jurisdiction or TMA must work closely with the Regional Administrator and *SmartRideshare* to create

the appropriate geographically defined boundary that captures the relevant users (live in the area, work in the area, or either).

- 9. Wirewrap:** A *wirewrap* refers to graphic customization for branding purposes (such as custom logo, headers, footers and colors). Your organization can work with *SmartRideshare* to set up a wirewrap so that when users visit a specific URL to participate in your ridesharing program/network, they see a specific set of visual clues. Examples of wirewraps include RideshareOnline, I-Way, Choose Your Way Bellevue, and Drive Less Save More. Optionally, you may set up the wirewrap so that when users register with *SmartRideshare* through it, the system associates them with that particular network through the wirewrap domain. This association method may be used for Program networks as well as State, Regional, County, Jurisdiction, and TMA networks. For more information about wirewraps and customized branding, please talk to your Regional Administrator.

Networks: The information that users input to join different networks, functions administrators have available to help users, and how SmartRideshare associates users to networks.

Network Type	Users What They Input That Allows Them to Join the Network*	Administrators Functions They Can Perform to Allow or Help Users to Join the Network	SmartRideshare System How It Associates Users to the Network
<i>Association is automatic upon user registration, and users cannot opt out of network membership ("Automated")</i>			
State	State designation during registration ¹ or profile update Sign-up through wirewrap site		State designation during registration or proxy creation or profile update Wirewrap domain
Regional/ Agency	Zip code as part of work and/or home address Sign-up through wirewrap site		Zip code of work and/or home address Wirewrap domain
County	Zip code as part of work and/or home address Sign-up through wirewrap site		Zip code of work and/or home address Wirewrap domain
Jurisdiction² (City)	City as part of work and/or home address Sign-up through wirewrap site		City designation of work and/or home address Geographically defined boundary with association based on work and/or home address ³ Wirewrap domain
TMA	Work and/or home address Sign-up through wirewrap site		City, zip code or geographically ⁴ defined boundary with association based on work and/or home address Wirewrap domain
<i>Users can opt to join or leave the network ("Opt in/Opt out")</i>			
Organization/ Employer	Organization email address Passcode Approval code provided by administrator	Passcode Proxy registration Email domain Import accounts Administrator approval	Private email domain Passcode Proxy registration Import accounts Approval code provided by administrator
University	University email address Passcode Approval code provided by administrator	Passcode Proxy registration Email domain Import accounts Administrator approval	Private email domain Passcode Proxy registration Import accounts Approval code provided by administrator
Program	Passcode Approval code provided by administrator Sign-up through wirewrap site	Passcode Proxy registration Import accounts Administrator approval	Passcode Proxy registration Import accounts Approval code provided by administrator Wirewrap domain
Worksite	Work address ⁵	Proxy registration ⁶ Import accounts ⁷	Work address
Division	Selection of division ⁸	Proxy registration	User's selection
School	Organization email address Passcode Approval code provided by administrator	Passcode Proxy registration Email domain Import accounts Administrator approval	Private email domain Passcode Proxy registration Import accounts Approval code provided by administrator

- * Users enter much more during registration; this is the information relevant to association with the network.
- 1 The state association does not happen on the basis of either home or work address but instead on the basis of the state input during registration or profile update.
- 2 Note that city networks do not distinguish between incorporated and unincorporated areas. Incorporated/unincorporated associations can be accommodated through TMA-type (geographically based) networks. Configuration of geographically based networks requires creation of a geo-based file, a task that *SmartRideshare* must perform. One geo-based file is needed for each contiguous geo-based area.
- 3 If cities want to limit their service area to the incorporated city area, they can use GIS-based association instead of city-based association.
- 4 If a TMA services a set of zip codes, the TMA can set up its network by using zip code association. Similarly, if a TMA services a city, it can use city-based association.
- 5 Users may go to Profile>My Locations>View Other Locations
- 6 Administrators can use proxy registration. However, the system does not associate the user to the Worksite network until the user selects a worksite.
- 7 Administrators can import accounts. However, the system does not associate the user to the Worksite network until the user completes registration AND selects a worksite.
- 8 This is available during user registration if the Division network has already been created and the higher-level network uses email domain association.

Notifying Prospective Users to Join the Network

To successfully attract network users, you must tell first people that the network exists and about the ridesharing and other benefits it can provide for them.

If you are relying on the wirewrap or user association methods (email domain, administrator approval, or passcode), people need to know why they should seek out and join the network and how to do so. Even if you intend to use bulk import, which you initiate, “advertise” the system and let people know that they will be pre-enrolled with the option to join and the time limit for pre-enrollment.

Use electronic bulletin boards, emails, or other outreach methods to make the existence of the ridesharing network known, along with instructions about how to access and join it.

The more information you can give to prospective users about the *SmartRideshare* system and its benefits, the easier and more attractive you will make joining your network.

Pre-enrolling Accounts for the Network by Using Bulk Import

You can help users join Organization, University, Program, and School networks by using the system’s *Bulk Import* tool to pre-enroll their accounts. This process requires that you already have prospective users’ email addresses. Note that this is a process you may repeat to add new employees or organization members over time, including people who were imported before but did not follow through with network registration.

To perform a Bulk Import, you must first create a spreadsheet with potential users’ names, email addresses, and phone numbers in a CSV file in Microsoft Excel or a similar

program (see instructions below.)

Once the import process has successfully completed, the *SmartRideshare* system sends imported users an email with a validation link and temporary password. You can customize the subject line and content of that notification email.

When users click the validation link, they confirm interest and participation in the program. When users first log in, they will have to change the temporary password to a unique, permanent one and also configure a secret question and answer. They will also need to complete the basic steps to access the program.

If users do not want to join the program, they do not need to take any action. After seven days, the *SmartRideshare* system removes non-validated accounts automatically.

1. Create a CSV File

Before you can use the Bulk Import tool, you must create a CSV (comma-separated values) file* to import. This spreadsheet must be set up to contain potential users' names, email addresses, and phone numbers. Microsoft Excel or a similar program can be used to create, export, and import CSV files.

If this is your first time creating a CSV file to import, then do the following:

Within your network, select **Users** from the navigation bar.

Click on **Import Accounts** at the bottom of the page.

You will see the box **Step 1: Upload CSV File (Import Account)**.

Select **Click here to download CSV template** (far right) to obtain a correctly formatted file called "ImportAccountTemplate.csv".

Save this file on your computer. Using your own spreadsheet software, open and fill in this file with potential users' names, email addresses, and phone numbers. Make sure to save the file in the CSV format. It is important that you create a valid CSV file before you begin the import process. This will prevent you from wasting time in reviewing errors and editing the file.

* This is a format that stores tabular numbers and text in plain-text form; file names end in .csv. Traditionally, lines in the text file represent rows in a table, and commas separate the columns. Microsoft Excel is a commonly used program that can export (and import) files in CSV format.

The screenshot shows a web interface for configuring email imports. At the top, there is a navigation bar with links for Benefits, Events, Networks, Users, Addresses, Reports, and Settings. Below this is a section titled 'Configure import_email'. The main content area is divided into two parts. The first part is 'Step 1: Upload CSV (Import Account)', which contains a text input field for the CSV file path, a 'Browse...' button, and an 'Upload' button. A link 'Click here to download CSV template' is located to the right. The second part is 'Import Summary', which contains a table with the following data:

Import Date	Status	More details
10-26-2011	Completed	More details

Below the screenshot, a caption reads: *The Step 1: Upload CSV (Import Account) box allows you to download a correctly formatted file called "ImportAccountTemplate.csv".*

2. Customize an email to users

Once you have the names and addresses ready, the next step is to customize the email that the *SmartRideshare* system will send your potential users inviting them to join the network.

Within your network, select **Users** from the navigation bar.

Click on **Import Accounts** at the bottom of the page.

You will see the box **Step 1: Upload CSV File (Import Account)**.

Click on **Configure import email** (upper left corner of the box) to customize the email that will be sent to newly imported potential users when the import process completes.

Spaces are provided for writing a subject line and customized email content. You may offer additional information about your network and how to join it, such as a secret question/answer, promotions, and more. This customized content accompanies the registration information sent by the *SmartRideshare* system.

Existing members of your network will not receive the import email. (For example, if you are importing only new employees, existing employees who are already members of the network will not receive the email). However, if an individual on your import list is already an *SmartRideshare* user (with other networks) but not yet associated with your network, the import process will associate the user account with your network.

The first figure below shows what you input. The second figure is an example of how the final email will look, with your subject line and customized content embedded. The *SmartRideshare* system sends this email to people on your import list immediately upon completion of the Bulk Import process.

Configure email ?

Bulk import email subject:

Bulk import email content:

*The **Configure Email** box allows you to customize the invitation to pre-enrolled users. The subject and content you enter are embedded in the email automatically sent by the SmartRideshare system, shown below.*

Dear [First name],

[Your customized message (entered as shown above) appears here.]

Your account has been pre-enrolled into the new RideshareOnline system. Please click on the link below to validate your account.

[Customized link for user]

Once you have validated your account, you may log in using the information provided below. You will be prompted to change your password. To protect your account, you will also be asked to create a secret question and answer.

Website link : [URL from SmartRideshare]
Your account log-in : [email address]
Temporary password : [assigned by SmartRideshare]

If you do not wish to use the RideshareOnline system, no action is needed. Accounts that do not receive responses to the pre-enrollment will be cancelled automatically within a few days.

Best Regards,
Program Administrator – [Your Network Name]

*The SmartRideshare system will send a similar message to new user names/emails after you have completed the **Bulk Import** process.*

Click **Save** when you are satisfied with your email.

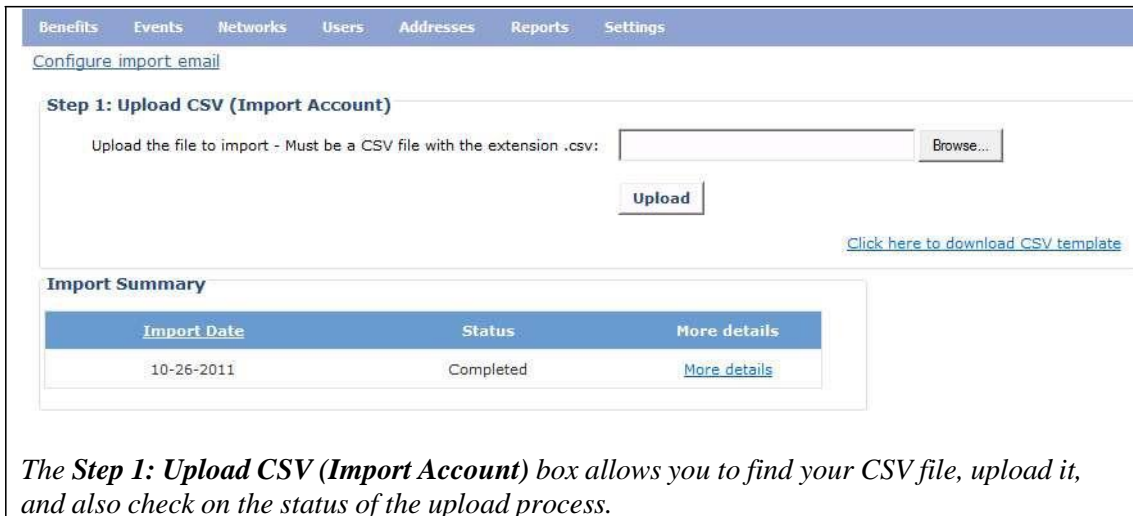
Click **Go back to Bulk Import page** after the program tells you that your email has been saved successfully.

3. Import information from a CSV file

Now that both your CSV file and email are ready, go to **Step 1: Upload CSV File (Import Account)**.

Click on **Browse** to find your CSV file to import.

Click the **Upload** button to start the upload process. (Computers running Windows software are recommended for this process. Those using Mac computers may encounter difficulties.)



The *Step 1: Upload CSV (Import Account)* box allows you to find your CSV file, upload it, and also check on the status of the upload process.

4. Set imported account options

After you click **Upload**, the box **Step 2: Select additional fields** appears. This assigns you an import ID number and gives you options for refining the imported data.

First, choose how the user's **screen name** will be viewed by other users who are looking to match rides: first name with last initial or last name with first initial.

Select the appropriate **state**.

Select **Public** or **Private** for the users' profiles. Users can later change their preference to public. The profile settings for users already in the network will be retained.



When a user's profile is **public**, his/her email address and phone number will show on the rideshare match list. If the profile is **private**, that information will not show on the match list. This will make creating a ride match more difficult. However, unless you have good reason, it is best to allow users to set their own preference for making their address and phone number public.

Next, specify whether you want the system to **Ignore** a user with an email address that already exists in the system or **Associate the user with the network**. Your CSV import file may contain records for not only new users but also users who are already in the *SmartRideshare* system as members of other networks. Select **Ignore** if you do not want to process existing accounts or associate existing *SmartRideshare* users with your network. This might be the case if you have already uploaded a complete organization roster, inviting all employees, and some have declined to sign up or subsequently disassociated themselves with your network. By selecting **Ignore**, you would be choosing not to send them repetitious invitations. Otherwise, select **Associate the user with the network**. Later in the import process, the system flags imported records with email addresses that are already in the *SmartRideshare* system as "Email address already exists."

Click the box **I am authorized to perform this import**.

Select the button **Preview Import** to ensure that the user data from the CSV file appear correctly. Once you have confirmed that everything is correct, you can select the option to complete the import process.

The screenshot shows a web interface for configuring an import. At the top, there are navigation tabs: Benefits, Events, Networks, Users, Addresses, Reports, and Settings. The main heading is "Step 2: Select additional fields". Below this, it displays "Your Import ID: 634552227920509076".

The configuration options include:

- Screen Name:** Two radio button options: "First name + first character of last name Example - 'johns'" (unselected) and "Last name + first character of first name Example - 'smithj'" (selected).
- State:** A dropdown menu currently set to "Washington".
- Profile Setting For Users With Email:** Two radio button options: "Public" (selected) and "Private" (unselected).
- Specify action if an email address already exists:** Two radio button options: "Ignore" (unselected) and "Associate user with network" (selected).
- Authorization:** A checkbox labeled "I am authorized to perform this import." which is checked.

At the bottom of the form, there are two buttons: "Preview Import" and "Cancel Import".

The Step 2: Select additional fields box allows you to further refine your imported records and select file preview.

5. Preview the imported data

The box **Step 3: Preview accounts** appears.

Select **Show all records** (default) or **Show only error records** to review the data.

For records with an error, the type of error is described in the left-hand column. This may be a missing first name, last name, email address, or phone number.

If errors are present, click **Export all records to CSV** to export and save the results displayed in the preview window. You can then fix the errors with your software and run the bulk import process again, importing the file with the corrected records. If you use a corrected exported file, make sure to remove the Error Message column before re-importing the records.

If the Preview shows no errors, click **Complete Import** at the bottom of the page.

The *SmartRideshare* system then sends your customized account registration email to the imported users.



It's a good idea to archive the CSV import file along with information about the date of the import and the results. The import files serve as a good way to keep track of which users have been imported, results achieved, and any additional processing you may need to do outside of the system.

6. Check the import status

The **Import Status** box appears after you click **Complete Import**.

You may also access this information from the box **Step 1: Upload CSV File (Import Account)** (go to **Users>Import Accounts**).

The **Import Summary** box allows you to click **More details** to check import status.

Viewing the **Import Summary** is helpful because the bulk import process allows you to import a large number of users (in the hundreds or even thousands) at one time. When you import a large set of users, the process may take a while to complete. The **Import Summary** box allows you to track the status of the import, showing you the Import ID, number of pending records, number of successfully imported records, number of error records, and current status (pending or completed).

If errors were present in the CSV file, click the link **Show Records** to view the error records and make a new CSV file with correct information. If an account was not imported because an email already existed in the system, that record will be included in the error list.

[Go back to Import Accounts](#)

Import Summary

Refresh the page to see the updated status.

Import ID: **634552287670306839**

Number of pending records: **0**

Number of records imported successfully: **9**

Number of error records: **0**

Current Status: **Completed**

*The bulk **Import Summary** box provides important information about the status and success of your file import.*



Creating a New Account on Behalf of an Individual

An administrator can assist users of Organization, University, Program, Division, Worksite, and School networks by creating accounts for them in a process called *proxy registration*. An account created by the administrator can be used for ride matching as well as all other available functions.



If the user has an email address, it is highly recommended that you encourage the user to create his/her own account. Once s/he has registered and validated the email address, you can help him/her in

utilizing the system to the fullest. Accounts created by users are tracked by an automated update process that deactivates the accounts after 180 days of inactivity. The drawback with proxy registration is that accounts created this way are not included in the automated update process.

This process assumes that you have communicated with the prospective user about sign-up requirements, or are even speaking to them on the phone in real time, as you will need to enter information for them such as screen name (which they **cannot** change), password (which they can change later), and a security question and answer (which they can change later).

1. Register a new user

Within your network, select **Users** from the navigation bar.

Click on **Register a new user** at the bottom of the page.

In the box **Provide personal information** enter the user's

- First name
- Last name
- State/Province (This associates the user to his/her state network. The default is Washington state.)
- Language preference (English or Spanish)
- Phone number

In the box **Provide account information** enter the following:

- User's email address (Not required. Leave blank if necessary)
- Confirmed email address
- A password (Required. 7 characters minimum, case sensitive. Standard practice is LastName plus last 4 digits of phone number. User may change later.)
- Confirmed password
- Screen name (Required. The name the user will want other users to identify him/her by—not an email address. The *SmartRideshare* system does not allow duplicate screen names. Note: The user **cannot** change this later.)
- A security question (Required. Make sure it's a question the user can answer; a standard proxy entry is, "What's my last name?" The user may change this later.)
- The security answer
- Whether the person wants to receive email notifications (that is, email sent by the administrator; users always receive rideshare notifications)

Check the box **Calling in user**... to indicate that you have spoken to the user, and s/he agrees to the terms of use and privacy policy to use the site.

Click **Register** at the bottom right to complete the registration.

The **Register a new user** page allows you to complete a proxy registration on a user's behalf

If the process is successful, a box will appear called **Account created** along with the message “User account has been successfully created”.

2. Access the user account

You then have the option to click **Access user account** to manage the newly created account.

If you do so, you will go to the What are you here for? page:

The sign-up screen for a new user

To streamline entry, check only **I am looking to share a ride to an event/one-time trip**. You will need to insert the user's home address.

Click **Continue**.

You may also access the new account by going to **Users** on your administrator's network navigation bar and clicking **Show All Members** or entering an email, user name or screen name in the search boxes. (See Chapter 4: Helping Members Use Your Network.)

3. Notify the new user

If you entered an email for the user account, the *SmartRideshare* system sends the user an email message with a validation link. The user must click on the validation link before s/he can log into the account for any purpose, including changing the password.

If you did not have an email for the new user account, the user cannot log in.



Approving Individual Requests to Join the Network

Users may not have an email address that has a private domain name associated with your network. For example, they may have only an email with @gmail.com or @comcast.net. Once users have completed their registration through an *SmartRideshare* system such as RideshareOnline, they can join your Organization, University, Program, or School network by requesting authorization from the administrator. (This assumes that you selected **Admin will approve request** when you established your network.)

1. User sends a request to join the network

Under **Profile** in the Navigation bar, *users* select **My Networks**.

Clicking on **Join Network** will present them with a searchable list of networks.

They must click **Select** next to the desired network.

This will produce a window from which they can send you an email request. They are instructed to “Provide details about your association with the network” and click **I do not have an email address issued by the network**.

They must write an email describing who they are and why they are eligible to be a member of the network (name, title, department, etc.).

They click **Submit**.

They then see this message appear: “**Network Enrollment Email Sent for Approval**. An email has been sent on your behalf to the person appointed to your network to process enrollment requests. Upon verification, you will receive an email from the person approving your enrollment request. The email will have instructions on how to complete the process of enrolling yourself with the network.”

They will also see the requested network listed under **Profile>My Networks>Pending Network Enrollment**.

2. Receive an email generated by *SmartRideshare*

The person designated to give approval will receive a network enrollment request email generated by *SmartRideshare*. The email contains two parts. The first contains instructions addressed to the administrator. The second contains instructions for enrollment and a validation code and is meant for you to copy and forward to the requester.

Dear [your name],

User "[user's name]" wants to be connected to "[Network name]" network in the [RideshareOnline](#) system and needs your approval.

To help you with the process of approval, we have included the user's comments below.

User Comments: “[User’s email message appears here]”

Once you determine he/she is a valid user of "[Network name]", please send the information below to the user to help the user get enrolled to your organization in our system.

You can send an email to this user at [user's email address].

This message contains instructions for you.

Dear [Users's name],

Please follow these steps to associate with "[Network name]" network successfully.

Visit [RideshareOnline](#)

Log in to your account

Select "Profile" from the application bar and go to "My Networks" and click Pending Network enrollment

Select "[Network name]" from the list and enter the code given below. Click "Validate"

Network Name: [Network name]
Validation Code : [six-digit numerical code]

Once you complete this process, you can search for trip partners within "[Network name]".

This message is meant for you to copy and forward to the requester.

3. Verify the eligibility of the requester

Verify that the requester is eligible to join your network.

4. Send an email to the new user

Send an email to the new user, forwarding the instructions for enrollment and the validation code.



Issuing a Passcode to Help Users Join the Network

Users may not have an email address that has a private domain name associated with your network. After users have completed their registration through an *SmartRideshare* system such as RideshareOnline, they can join your Organization, University, Program, or School network by using a passcode. (This assumes that you selected and entered a **Passcode** when establishing your network.)



Passcodes have not been very effective when used as the primary method of allowing users to join a network; however, they are often necessary as a supplemental method. If you choose to use a passcode, consider how the potential users will access information so that you can securely communicate the passcode.

1. Distribute the passcode to potential users

Use an electronic bulletin board, email, or other secure outreach method to communicate the passcode to potential users.

2. Users sign up with the passcode

Under **Profile** in the Navigation bar, users select **My Networks**.

Clicking on **Join Network** will present them with a searchable list of networks.

They click **Select** next to the desired network.

At the bottom of the window, they click **I have an enrollment passcode issued by the network** and enter that enrollment passcode.

Then they click **Submit**.

If the passcode is successful, the network will show up in the user's list of networks under **Profile>My Networks**.