

Chapter 4: Helping Members Use Your Network

[Adding Addresses or Locations for User Selection](#)

[Viewing a User List](#)

[Viewing Individual User Account Information](#)

[Assisting Users with Account Access](#)

Validate a user account

Unlock a user account

Reset a user's password

Deactivate a user account

Disable/enable a user account

Remove a user from your network(s)

Grant/revoke administrator rights

[Assisting Users as a Proxy](#)

Now that your network is established, you can add addresses or locations for your network. You can view users' account information and help them with various account tasks. Unless otherwise noted, the steps for these management functions are the same for Organization, University, Program, Division, Worksite, and SchoolPool networks.



Adding Addresses or Locations for User Selection

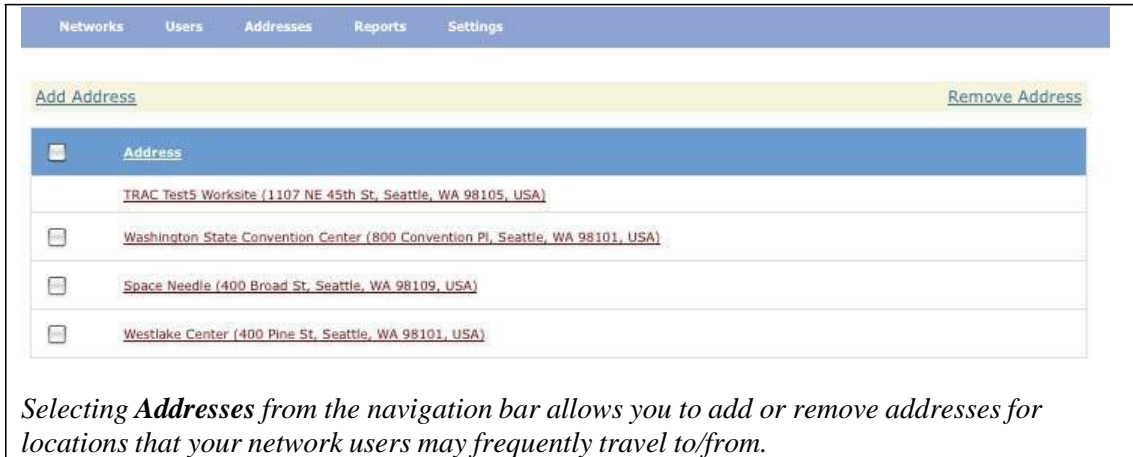
Administrators of Organization, University, and SchoolPool networks can assign addresses for locations to/from which their network users frequently travel. Users can then select these addresses from a drop-down list during the process of creating a ride match or logging trips in their calendars. These addresses are not Worksite networks; rather, they may be conference sites, meeting places, or other commonly visited locations. The reason to give network members a drop-down list of address options is that it makes the system easier for them to use: they can simply choose from an existing list instead of having to find, remember, and type in an address. (However, since all addresses appear on this list, be careful not to create so many that the list becomes overwhelming.) This feature is available only for Organization, University, and SchoolPool networks. It is not available for Program, Division, or Worksite networks. No reporting, incentive management, or program outreach is available for an address.

Note that users can also add their own quick addresses by going to **Profile>My Locations>Add a New Location**. Those locations will show up only for the individual user and not for all members of the network.

Add an address

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

Click **Add Address** in the upper left corner.



*Selecting **Addresses** from the navigation bar allows you to add or remove addresses for locations that your network users may frequently travel to/from.*

Type in a street address and city for the location. The map below the box will pinpoint your selection. If you don't know the address, you can double-click on the map to pinpoint the location. The system will fill in zip code and country.

Verify that the returned address is correct, including the state and zip code.

Enter a "friendly name" for the location, one that users will easily recognize, for example, "Washington State Convention Center," "Northgate Mall," "Kingsgate shopping center," "ACME Distribution center."



CAUTION: Carefully check to ensure that the resulting address is correct. Once you have entered and saved a location address, you cannot change it, and although you can remove it, it will not disappear from users' existing address lists. If, in trying to correct an incorrect address, you remove it and then input the correct address with the same "friendly name," users will see the same friendly name twice on their address lists. Contact support@rideshareonline.com for help.

For **Show address by default**, select **Yes** to make the address appear in a drop-down list of location options when users enter information seeking a ride match or logging trips. The address will also be displayed to users as "Other Locations" under **Profile>My Locations**.

If you select **No**, then the address will not appear in the drop-down list, and users will have to type it in. The address will be recorded in the system, and you may later make a change to include it in the drop-down menu.

Click **Save Address**.



The screenshot shows a web interface with a navigation bar at the top containing links for Benefits, Events, Networks, Users, Addresses, Reports, and Settings. Below the navigation bar is a form titled "Add an address for the organization". The form contains three input fields: "Address:" with the value "800 Convention Pl, Seattle, WA 98101, USA", "Friendly Name:" with the value "Washington State Convention Center", and "Show address by default:" with two radio buttons, "Yes" (which is selected) and "No". A "Save Address" button is located at the bottom of the form.

*Enter the address and “friendly name” and choose **Yes** to make the address appear in a drop-down list for users.*

Change address information

You can change the “friendly name” for a particular address and whether it is shown by default in a drop-down menu for users. (Note: you cannot change the address itself. See the best practice caution above.)

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

Click the desired address link.

Change the “friendly name” or drop-down menu status (**Show address by default, Yes** or **No**) as desired.

Click **Update**.

Remove an address

Note that although you can remove an address, it will not disappear from users’ existing address lists. (See the best practice caution above.) Also, if the address is for a Worksite, which can also be configured to appear on the drop-down address list, it cannot be removed.

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

Click the box beside the address you wish to delete.

Click **Remove Address** in the upper right corner.

Viewing a User List

Administrators of Organization, University, and SchoolPool networks can view the entire list of network users, including their name, email address, screen name, and whether their account has been deactivated (is inactive), by using the **Show all members** function. This list includes links to individual users' account information.

Administrators of all network types can also view a list of users with the **User Registration Report**. This report shows name, email address, screen name, and phone number, as well as other information. This report does not include links to individual user's account information.

Organization, University, and SchoolPool network administrators

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

In the upper left, click on **Show all members**.



The screenshot shows a web interface with a navigation bar at the top containing 'Users', 'Addresses', 'Reports', and 'Settings'. Below the navigation bar, there is a 'Show all members' link. To the right of this link, there are two statistics: 'Number of active users: 12' and 'Number of inactive users: 0'. Below these statistics is a rounded rectangular box titled 'Program outreach' containing three links: 'Edit/View user home page content', 'Send email to user group for outreach', and 'Edit/View notification'.

*View a list of all network members by clicking on **Show all members**.*

Click on an underlined column title, such as **First Name**, **Last Name**, or **Email Address**, to sort the list alphabetically. This can ease the task of locating a user. The sort cannot be saved.

All network administrators

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

In the **User Reports** box, click on **User Registration Report**.



Opening the User Registration Report is another way to view a list of network members.

In the upper left, select the **Start Date** and **End Date** that will produce the range of members you wish to see.

Click **View Report**.

To exit the report, click **X Close** in the upper right.



Viewing Individual User Account Information

SmartRideshare gives administrators a comprehensive view of information about individual users, allowing you to view their contact information, last activity date, active trips, trips logged in their calendar, and more.

1. Find a user account

Administrators of all networks can use the **Look up a user** boxes to search individually for names with clickable links to account information. Administrators of Organization, University, and SchoolPool networks can also access the **Show all members** list of users containing names with clickable links to account information.

All administrators:

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

In one of the **Look up a user** boxes, enter the user's email address, name (full or partial), or screen name.

Click **Get Details**.

Organization, University, and SchoolPool network administrators:

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

In the upper left, click on **Show all members**.

Click on an underlined column title such as **Last Name** to sort the list.

Click the network member's **First Name** link.

The screenshot displays a web interface for network management. At the top, there is a navigation bar with 'Addresses', 'Reports', and 'Settings'. Below this, a 'Show all members' link is visible. On the right side, there are statistics: 'Number of active users: 11' and 'Number of inactive users: 0'. The main content area is divided into four sections:

- Program outreach:** Contains three links: 'Edit/View user home page content', 'Send email to user group for outreach', and 'Edit/View notification'.
- Look up a user using email address:** Features an 'Email:' input field, a prompt 'Enter the email address of the user.', and a 'Get Details' button.
- Look up a user using name:** Features a 'User Name:' input field, a prompt 'Enter the full or part name of the user.', and a 'Get Details' button.
- Look up a user using screen name:** Features a 'Screen Name:' input field, a prompt 'Enter the full or part screen name.', and a 'Get Details' button.

*Look up a user by entering an email address, user name, or screen name or by clicking on **Show all members**.*

2. View a user account

Clicking **Get Details**, or the user's **First Name** in the **Show all members** list, produces a comprehensive view of the user's account:

The screenshot displays a user account page with the following sections:

- Member Details:**
 - Member Name: Bogey2 Perez
 - Contact Phone: 3061111111
 - Employer Name: ABC Widget, ACME Toy Company
 - Email Address: zyogeyezgle98126@gmzil.xom
 - Last Activity Date: 10/8/2010
 - Last Visited Domain: rsotraining.icarpool.us
 - [Access User Account](#)
- Account Details:**
 - Email Validated: Yes
 - Email Validation Link: N/A
 - Account Locked: NO
 - Account Disabled: Yes
 - Account Status: Active
 - [Reset Password](#)
 - [Unlock User](#)
 - [Enable User Account](#)
 - [Deactivate User Account](#)
- Member's Trip(s):**

Start Address	End Address	Route Type	Status
8951 45th Ave SW, Seattle, WA 98136, USA	262 Southcenter Mall, Tukwila, WA 98188, USA	Recurring	Not in Confirmed Pool
8951 45th Ave SW, Seattle, WA 98136, USA	611 106th Ave NE, Bellevue, WA 98004, USA	Recurring	Not in Confirmed Pool
- Notes: (This will not be seen by the user)**
 - Empty text area for notes.
 - [Save Notes](#)
- Miles Logged in Calendar:**
 - Bike: 0
 - Bus: 0
 - Carpool: 129
 - Compressed Work Week: 0
 - Did Not Work: 0
 - Drive Alone: 0
 - Light Rail: 0
 - Other: 0
 - Passenger Ferry: 0
 - Streetcar: 0
 - Telework: 0
 - Train: 0
 - Vanpool: 0
 - Walk: 0
 - [Click here to view past trip logs](#)
- Administrator Access Permissions:**
 - Organization: ACME Toy Company
 - Organization
 - Grant
 - [Remove from network](#)

*Clicking on **Get Details** provides you with a comprehensive view of the user's account.*

Member Details box: shows the user's name; phone number; any Organization, University, Program, or SchoolPool network with which the user is associated; email address; last date of user activity; and last visited domain (the website through which the user accessed the system). If the user is part of a vanpool, you will also see the vanpool membership details. There is also a link, **Access User Account**, that allows you to enter the user's account as a proxy (see *Assisting Users as a Proxy*, below).

Account Details box: shows account status information: email validation, whether the account is locked or disabled, and whether it is active. You are also given links to reset the user's password, unlock the account, disable/enable the account, and deactivate the account. (See Assisting Users with Account Access, below.)

Member's Trip(s) box: shows the addresses of active trips and their status.

Notes: allows you to enter notes about the user that users will not see.

Logged Miles box: shows logged miles by mode and provides a link for viewing logged trips in a calendar.

Administrator Access Permissions box: allows you to grant or revoke administrative access to a user who is also an administrator (see Assisting Users with Account Access, below).

Remove from network link: allows you to delete a user from your network (see Assisting Users with Account Access, below).



Assisting Users with Account Access

After you have located a user's account information (see Viewing Individual Account Information, above), you can assist with a number of account access issues, including validating, unlocking, deactivating, and disabling a user account; resetting a password; granting administrator rights; and removing a user from the network.

Validate a user account

When a user first registers to join a network, or an account is started as the result of the bulk import process, or an account is created by proxy, the *SmartRideshare* system sends an email. That email is intended to confirm the user's email address and contains a link for responding. (Note that self-registered and bulk import accounts expire in 7 days if they are not validated. Accounts created by proxy do not expire.)

If users have not validated their account by responding to the system email, then the link that was sent is visible in the **Account Details** box. Users may ask for help with validation if, for example, they mistakenly delete the email containing the validation link before they have had an opportunity to respond.

Access **Account Details**. The box will list "Email Validated: No".

Copy the listed **Email Validation Link** into an email for the user.

Send the copied link to the email address shown in the **Member Details** box (through separate email, not through the system). This will allow the user to confirm that the email address is correct.

If an email address is not correct, you can proxy into the user's account and go to **Profile>My Account**. At the bottom of the page is a link to change the email address. A validation link will be sent to the new address.

The screenshot displays a web application interface with a navigation bar at the top containing links for Benefits, Events, Networks, Users, Addresses, Reports, and Settings. The main content area is divided into several sections:

- Member Details:** Displays member information for 'Bogey2 Perez'. Fields include Contact Phone (3061111111), Employer Name (ABC Widget, ACME Toy Company), Email Address (zyogeyezgle98126@gmxil.com), Last Activity Date (10/8/2010), and Last Visited Domain (rsotraining.icarpool.us). An [Access User Account](#) link is provided.
- Account Details:** Shows account status: Email Validated (Yes), Email Validation Link (N/A), Account Locked (NO), Account Disabled (Yes), and Account Status (Active). Action links include [Reset Password](#), [Unlock User](#), [Enable User Account](#), and [Deactivate User Account](#).
- Member's Trip(s):** A table listing trips with columns for Start Address, End Address, Route Type, and Status.

Start Address	End Address	Route Type	Status
8951 45th Ave SW, Seattle, WA 98136, USA	262 Southcenter Mall, Tukwila, WA 98188, USA	Recurring	Not in Confirmed Pool
8951 45th Ave SW, Seattle, WA 98136, USA	611 106th Ave NE, Bellevue, WA 98004, USA	Recurring	Not in Confirmed Pool
- Notes:** A text area for notes with a [Save Notes](#) button. A note is present: *(This will not be seen by the user)*.
- Miles Logged in Calendar:** A list of transportation modes and their corresponding miles: Bike (0), Bus (0), Carpool (129), Compressed Work Week (0), Did Not Work (0), Drive Alone (0), Light Rail (0), Other (0), Passenger Ferry (0), Streetcar (0), Telework (0), Train (0), Vanpool (0), and Walk (0). A link [Click here to view past trip logs](#) is provided.
- Administrator Access Permissions:** A box for managing permissions for 'ACME Toy Company' (Organization). It includes a [Grant](#) button and a [Remove from network](#) button.

You can help the user with a number of account access problems by using links in the Account Details and Administrator Access Permissions boxes.

Unlock a user account

An account will be *locked* if a user has made ten successive, failed attempts to log into the account. If a user is locked out and contacts you for help:

First verify the identity of the user.



S/he should be able to provide you with identifying information that you can confirm within the system.

Access **Account Details**. The box will list “Account Locked: Yes”.

Click **Unlock User**.

Ensure that the user knows his/her password or how to reset it in order to prevent a reoccurrence. If the user does not know the answer to his/her security question, you can reset the password (see below).

Reset a user's password

Users who forget their password can normally reset it themselves by using the secret question and answer they entered during registration. In the rare case that a user forgets the secret answer, you can reset the password:

First verify the identity of the user. S/he should be able to provide you with identifying information that you can confirm in the system.

Access **Account Details**.

Click **Reset Password**.

Enter the user's email address, and the system will email a temporary password to the user. The user can then change the temporary password upon logging in. Suggest to the user that s/he also change the security question and answer.

Deactivate a user account

If an account is *deactivated*, then active ride matching trips are removed system-wide—that is, for all *SmartRideshare* networks, not just your own—and do not appear to other users. A user may request that his/her account be deactivated, or the system will deactivate a self-registered account if a user does not log in after 180 days. The system also sends out three warning emails before automatic deactivation occurs.

Deactivation does not remove the account from the system (in contrast, see “Disable a user account” below). The email and user name still reside in the system and therefore

cannot be used by someone else. Also, a user can reactivate his/her account simply by logging in.

Note that accounts that are part of an operating vanpool or that contain a SchoolPool trip cannot be deactivated.

Access **Account Details**.

Click **Deactivate User Account**.

The user can reactivate the account by logging in.

Note that if an administrator reactivates a user account, the last activity date is not updated. Therefore, the system will deactivate the account again.

Disable/enable a user account

If you need to quickly stop a user from utilizing the *SmartRideshare* system—that is, all networks, not just your own—you can *disable* an account. Potential reasons for doing this might be abuse of the system or an obscene user name. Only a global administrator can *permanently delete* a user, but as a network administrator, you can disable an account to stop usage until a global administrator can take action. Send an email to support@rideshareonling.com to request such an action. Only an administrator can enable an account that has been disabled (that is, before permanent deletion); users cannot re-enable their own accounts.

Note that accounts that are part of an operating vanpool or that contain a SchoolPool trip cannot be disabled.

Access **Account Details**. (If an account is enabled, the box will display “Account Disabled: No”. If it has been disabled, the box will display “Account Disabled: Yes”.)

To disable an account click **Disable User Account**.

To enable the account click **Enable User Account**.

Remove a user from your network(s)

You can remove a user from the network(s) for which you are an administrator. This may be necessary if, for example, a network user leaves your organization. The person will be deleted from your network(s) but not from other *SmartRideshare* networks to which s/he belongs.

Access **Account Details**.

Click the **Remove from network** button.

Grant/revoke administrator rights

If the user is or should be an administrator for your network(s), you can give that person administrator access. You can grant administrator rights only to your own network and its subnetworks. For example, if you are an administrator of an Organization network, you can grant administrator rights only to it and to any of its Worksite, Division, and Program subnetworks.

You can also revoke administrator rights, which may be appropriate, for example, if an employee with those rights leaves the organization.



Administrator rights should be granted only to those who have a business reason to use them, as well as accountability to the organization. Administrators must agree to respect the privacy of member information and use that information only for intended purposes. Your organization's contract with your Regional agency details appropriate expectations for administrators.

Access **Account Details**.

Locate the box **Administrator Access Permissions**.

To grant administrator rights, click the **Grant** button next to the appropriate network(s).

To revoke administrator rights, click the **Revoke** button next to the appropriate network(s).



Assisting Users as a Proxy

You can assist network users by accessing their accounts on their behalf in a process called *proxy functionality*. As their proxy, you can solve users' difficulties with ridematching and help with other administrative tasks.

Note that you cannot access an account to act as a proxy for users who have administrator privileges. Users can also disable proxy access to their accounts by going to **Profile>My Account**.

1. Find a user account

Follow the process outlined under Viewing Individual Account Information, above.

2. Access the user's account as a proxy

Click on **Access User Account** at the far right of the **Member Details** box.



Click **Access User Account** to enter the user's account as a proxy and perform functions within the account on his/her behalf.

3. Operate within the account on the user's behalf

You arrive at the page **Profile>My Account** within the user's account.

Verify that you are in the correct account.

You are able to navigate within the user's account and perform any *SmartRideshare* function available to the user as if you were the user. Note that this will not update the user's last activity date.