Boulder

OS SOP
Training and reference

Emergency Contacts

Boulder Emergency Lines

Boulder Emergency: 911
Boulder Police Non-Emergency: 1 (303) 441-3333
Boulder Fire Non-Emergency: 1 (303) 441-3350

Lime Managers

Cody Noblin (Operations Manager): 1 (303)-356-9332

Alexander Sandor (Operations Coordinator): 1 (203)-505-4560

Alfredo Acevedo (Mechanics Manager): 1 (720)-238-5115
Robert Perry (Operations Lead):

Devin Morrison (Operations Coordinator): 1 (719)-761-1418

Section	Content	Trainer Initials	Trainee Initials	Date
Slack	Show Trainee how to: - Log into Slack - Add workspaces - Add Slack Channels - Emoji posts -Communicate with team when returning to the warehouse - Communicate about missing or vandalized vehicles - Snooze/Un-snooze notifications - Update Profile Photo - Use @channel, @here and @"employee" messages - Identify patterns and document for future use. - All shift messages and plans			
Ops App/ Admin Tool	Fleet Portal -Operational scooters -Where juicer held scooters are represented in the portal. **Map view** -Common errors in Admin Tool (refresh errors and fixes) -Juicer Hoarding -24 hour offline vehicles -Finding specific scooters using QR code in Admin Tool - Walk through basic filters - Looking for Manual Lock Unlocked Bikes - Purple/Red/Orange/Yellow/Gray tasks - GPS Drift and using the last photo & ring feature. **Batch mode lock and unlock** **Deploy tasks** - Batch mode diagnose **Retrieval tasks** -Common issues with retrieval including a forced unclaim on tasks to reset the scooter / bike **Operations Application** - Health Checks (identifying bad vehicles in the field) - Marking scooters as broken in the operations application. - OS deployment vs Juicer deployment - Operations Application Filters - Select and navigate to different hotspots - Log out at the end of shift			

Section	Content	Trainer Initials	Trainee Initials	Date
Gas & Vans	- Gas card and pin - Windshield fluid replacement - Changing a tire -Accident form - Reporting van damage - Proper cleaning of vans			
Safety	**Grappling hooks** - Check your surroundings before using them - Tie off the rope so it doesn't get lost **Ratchet straps** - Strap down all vehicles that come into the van - Strap down all batteries that come into the van - Do not leave straps on the floor of the van because it can cause a hazard **Proper handling of batteries** **Reflective vests** - Low visibility situations - Law enforcement interactions			

OS SOP

Basics

Table of Contents

Boulder Field Map

Boulder Field Map

Purple: Zone 1   **Orange: Zone 2**

Yellow: Zone 3

OS Priorities

Shift Start Message

Introduction
In this section OSs will learn how to assemble a shift start message and a plan based on a descending priority list. To achieve this OSs will use a combination of the Operations Application, Admin Tool and Slack. Using Admintool OSs can find numerical outlooks

Finding and Analyzing Metrics
To start the day OSs will create a shift start message using Admin Tool. This message will outline the number of scooters that are available to consumers, being ridden by consumers, unavailable to consumers, or being held by LPs and Juicers. OSs will use a combination of these metrics to determine if the deployment of additional scooters into the service area is needed.
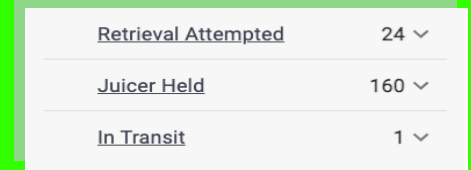
<u>Operational</u>: Admintool > Fleet Portal
    (Filter: Scooters)
<u>Sick/Juicer Held</u>: Admintool > Fleet Portal
    (Filter: Scooters)
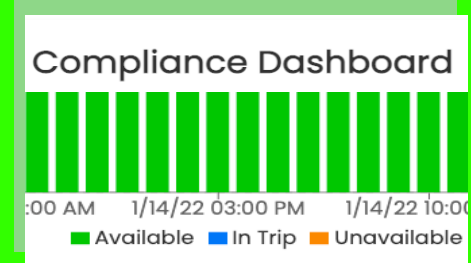<u>Max Cap</u>: Total Number of Scooters Allowed in Denver
<u>Total Scooters</u>: Sick/Juicer Held + Operational
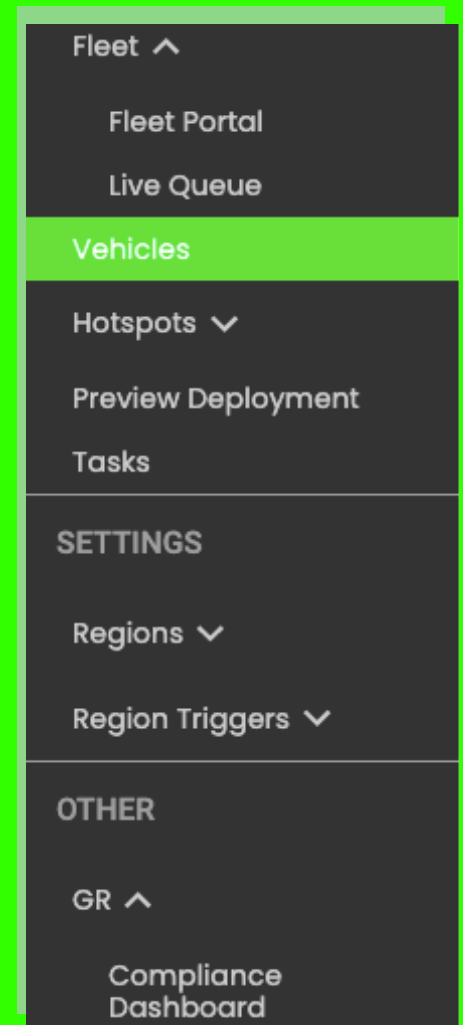<u>Needed for Cap</u>: Total Scooters - Max Cap

Admintool
Fleet Portal
fig 1

Admintool
Compliance Dashboard
fig 1.5

Admintool
Side Navigation
fig 2

The Plan

At the beginning of shift OSs will post a plan in Slack detailing the work they plan to do. This post will accompany the Shift Start Message show in fig 2.5.

To write this message the OS should consider what tasks need to be done and what the priority of each task is. OSs should make a plan for the entire shift and if needed post an update to the plan if circumstances change. The plan should be based on the following priorities.

1. **Shift Start Message** (Lime Slack)
2. **Boulder City Tickets** (Jira)
3. **Customer Service Tickets** (Lime CX)
4. **Deployments** (Creating Tasks for LPs and Juicers)
5. **Urgent Attention Scooters** (LP Slack)
6. **Priority Scooters** (Tasked Scooters)
7. **Tidying Routes in Downtown Areas** (Rebalancing)

Spoke Markets:

In our spoke markets a breakdown of operational scooters battery percentages is added to the bottom of the Shift Start Message. You can see an example of this in fig 2.5. The process for getting these numbers is listed below and is posted on/by the operations desk.

<u>0%-19% Scooters:</u>
Admin Tool -> Fleet Portal

<u>20%-40% Scooters:</u>
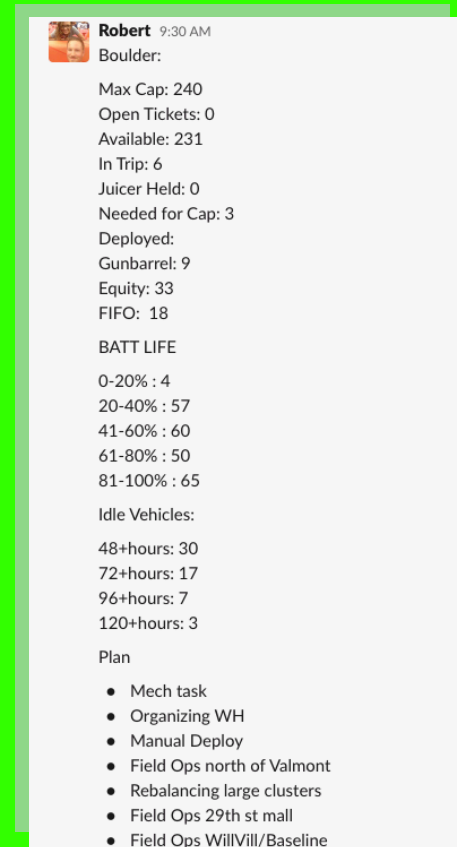Admin Tool -> Fleet Portal

<u>41%-60% Scooters:</u>
Admin Tool -> Fleet Portal

<u>61%-80% Scooters:</u>
Admin Tool -> Fleet Portal

<u>81%-100% Scooters:</u>
Admin Tool -> Fleet Portal

Robert 9:30 AM
Boulder:

Max Cap: 240
Open Tickets: 0
Available: 231
In Trip: 6
Juicer Held: 0
Needed for Cap: 3
Deployed:
Gunbarrel: 9
Equity: 33
FIFO: 18

BATT LIFE

0-20% : 4
20-40% : 57
41-60% : 60
61-80% : 50
81-100% : 65

Idle Vehicles:

48+hours: 30
72+hours: 17
96+hours: 7
120+hours: 3

Plan

- Mech task
- Organizing WH
- Manual Deploy
- Field Ops north of Valmont
- Rebalancing large clusters
- Field Ops 29th st mall
- Field Ops WillVill/Baseline

Slack
Shift Start Message and Daily Plan
*fig 2.5*

Customer Service Tickets

Introduction
In this section OSs will learn how to deal with requests assigned to operations by the City and by members of the general public. These requests are referred to as customer service tickets and are the most important part of an OS's job. They should be completed within 4 hours whenever possible.
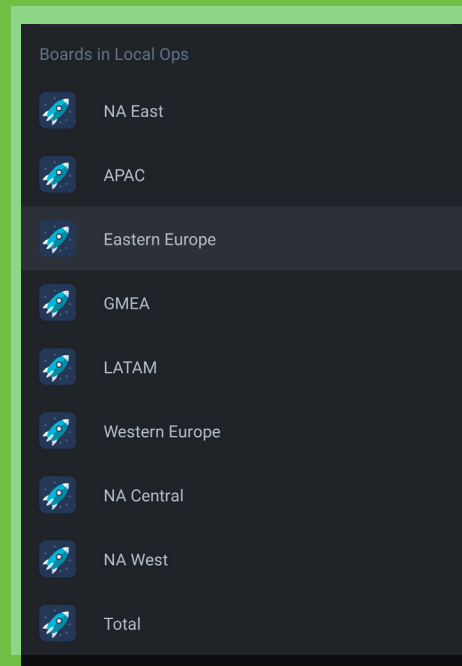
Where to View Tickets
On the operations phone tickets can be found in the Jira application. They are viewed through the projects tab by using the following filters:
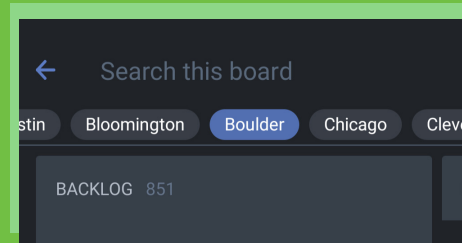• Region: NA Central (fig 6)
• City: Colorado Springs (fig 7)
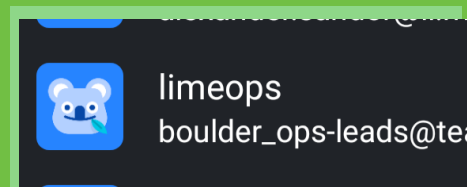
*Jira Application
Channel Navigation
fig 5*

*Jira Application
Setting Region Filters
fig 6*

*Jira Application
Backlog/Filters
fig 7*

OS Priorities:
Customer Service Tickets

Starting a Ticket

When a ticket comes in, the first thing that an OS should do is communicate with the team using our internal communication application Slack. When communicating in Slack use the *@name* to send a notification to the other employees on shift and inform them that the ticket is being taken care of. An example of a @name tag can be seen in fig 8.

Identifying High Level Tickets

At times there are tickets that need to be completed by a manager. These tickets may be requests for partnerships or for actions such as mandatory parking zones.

For these types of tickets OSs should start by changing the ticket status to "In Review". If the ticket is asking for scooter removal, navigate to and move the scooter. Then comment on the ticket and provide information indicating that a manager has been contacted. Finally use Slack and a @name tag to inform a manager that there is a ticket that needs special attention.

Tickets With Missing Information

Even if there is very little to no information on the ticket OSs should still try to complete the ticket. If this proves to be impossible post in Slack and inform the Operations Lead or Lime Manager.
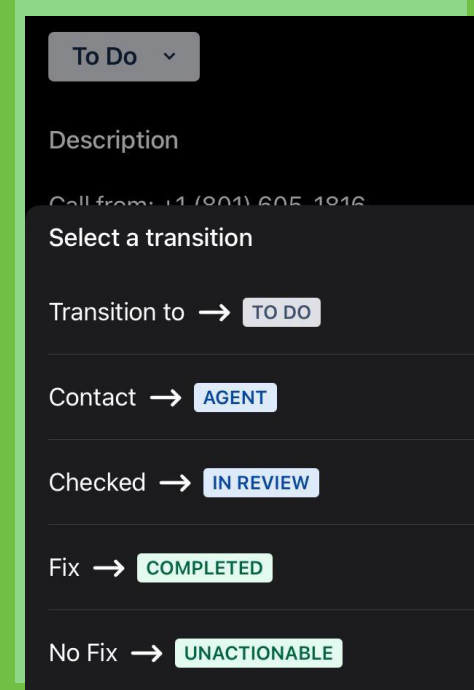
Completing a Ticket

After an OS has completed a ticket they have to mark it in the Jira application and add a comment to the bottom of the ticket. The comment should be un-opinioned and include the OSs initials at the end of the message.

Changing the status of a ticket to Complete or Unactionable is the most critical part of resolving the ticket. The comment and initials help Lime Managers and OS Leads understand the resolution and OS associated with each completion.
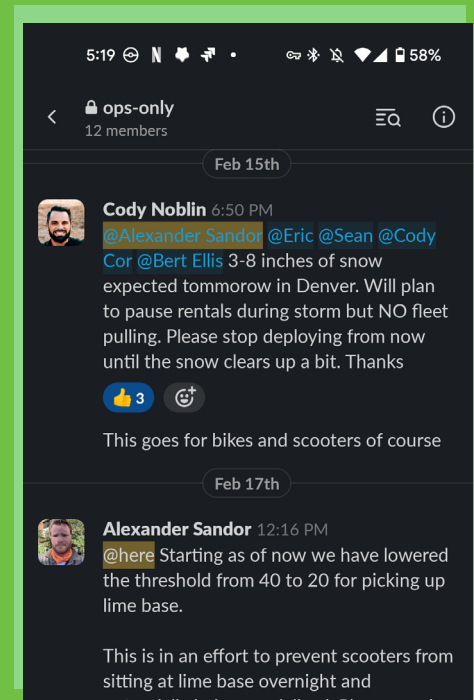
Slack
@name Tagging
fig 8

Jira Application
Completeing a Ticket
fig 9

Deployments

Introduction
In this section OSs will learn how to move scooters to the deployment area and create **"Deploy Tasks"** on them so they can be picked up by LPs and Juicers.

Deployment Times
During the day there are set times when OSs will create deploy tasks on scooters to meet Colorado Spring's Max Cap. Below are the deployment times:

• 7:00 AM
• 12:00 PM
• 3:00 PM
• 8:00 PM

Battery Check Out
OSs will need to check out a battery for every scooter they plan to create a deploy task on. To check out a battery OSs will navigate to the check out section of the Operations Application. OSs will do this by going to the main page and selecting **"Check Out"**. This will bring up a camera view. From here OSs can scan the QR code on the back of the battery. The Check Out section of the operations application is shown in fig 12.
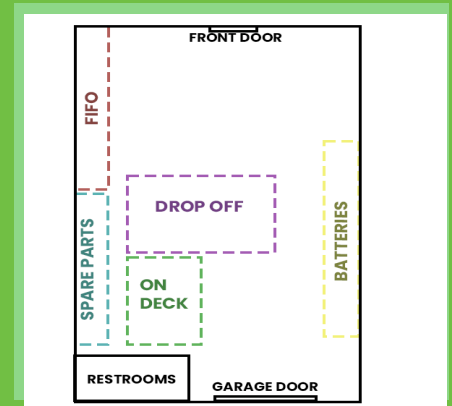
*Boulder Warehouse
Flow and Areas
fig 10*
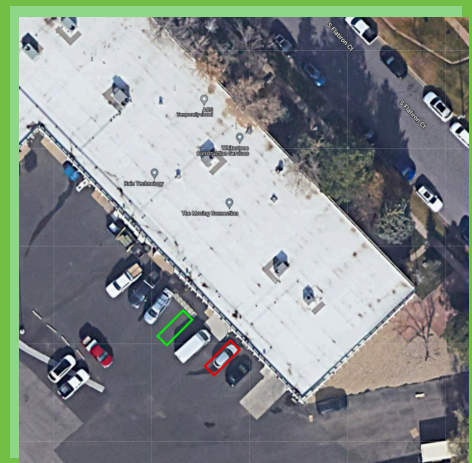
*Boulder
Warehouse Deployment Area
2200 East 76th Ave, Unit C400, C500
fig 11*
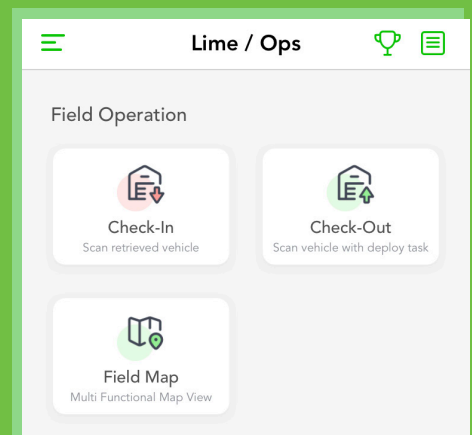
*Operations Applicaiton
Check Out Navigation
fig 12*

Inserting Batteries Into Scooters

Now that the batteries have been checked out OSs can insert them into scooters. To do this we will bring the battery in at an angle and insert it into the neck of the scooter. This process is shown in fig 13.

How to Create Deploy Tasks

Scooter deployments are done by LPs and Juicers. Before making scooters visible on the Lime application for both LPs and Juicers, OSs need to move the scooters to our deployment area.

OSs will start by **"Batch Mode Unlocking"** the scooters needed for deployment. In order to navigate to batch mode unlock OSs will go to the main page of the operations application. There is a green scan button at the bottom of the screen. OSs can toggle batch mode actions by clicking on the **"Batch Actions"** button on the bottom right of the screen. Scan the scooters QR code once batch mode to unlock has been selected. This is shown in Fig 14.

Once all scooters are unlocked they have to be moved to the deploy area. This is a clearly marked green box outside of the warehouse.
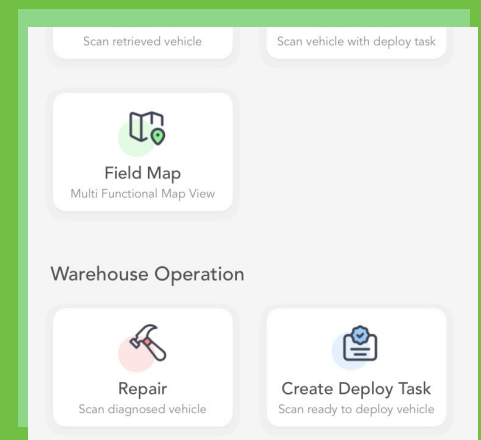
Deploy Tasks

The final step to deploying scooters is to create a Deploy Task on them. This will make the scooters visible to both LPs and Juicers. OSs can find the deploy task scanner on the main page of the operations application. The **"Create Deploy Task"** section is shown in fig 15.

Battery
Inserting into Scooter
fig 13
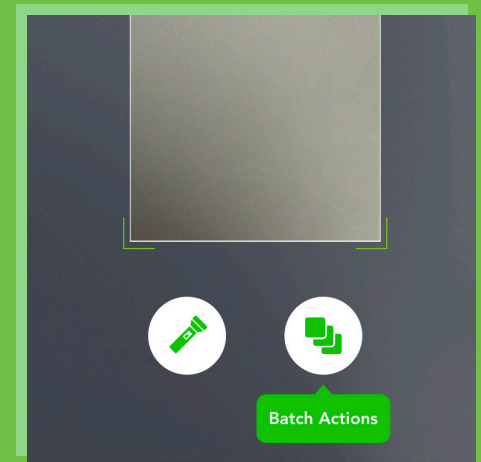
Operations Application
Batch Actions
fig 14

Operations Application
Create Deploy Task
fig 15

Urgent Attention Scooters

Introduction
Urgent Attention Scooter Requests can be found in the Colorado Springs LP workspace in Slack. Requests are posted in Slack because an LP was unable to resolve an issue with a scooter in the field. These require the involvement of an OS. An example request can be seen in fig 17.

Starting a Request
To indicate that an OS plans to resolve an Urgent Attention Scooter Request, an OS will post in Slack stating simply that the OS is on route to the scooter. This is to inform other OS personnel that the Urgent Attention Scooter Request is being handled.

Completing a Request
Once arriving at the location of the request OSs should resolve the issue and emoji the original Slack post. The action of adding an emoji will indicate that the issue has been resolved.

Every Urgent Attention Scooter should be returned to the warehouse to be checked by mechanic staff.
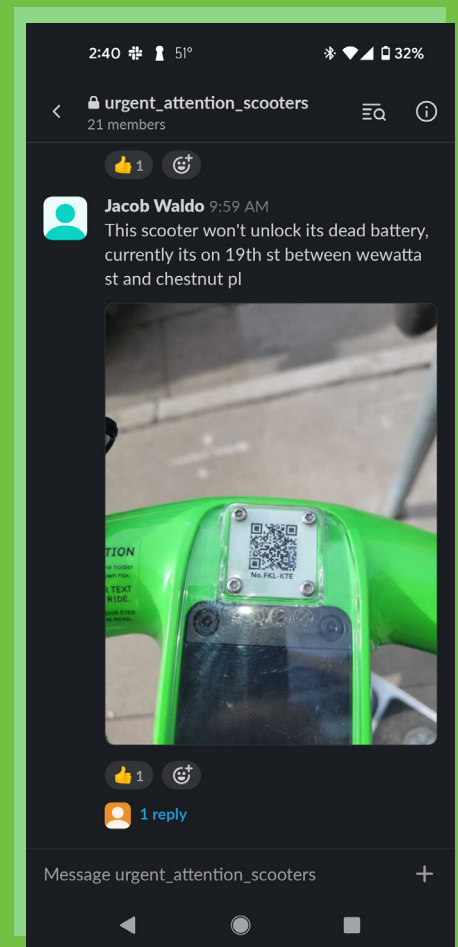
Slack
Urgent Attention Channel
fig 17

Priority Scooters

Introduction
In this section OSs will learn what priority scooters are, how to view them in the Operations Application, how to retrieve them with the Operations Application and what to do with scooters that have been retrieved.

Understanding Priorities
There are different priority levels for scooter tasks. Highest and High priority tasks are the focus of this section. Medium and Low Priority scooters can be addressed after completing every other priority listed in this SOP.

Finding Scooters and Setting Filters
OSs will be using the Field Map in the Operations Application. The Field Map section of the Operations Application is highlighted in fig 19.

After selecting Field Map OSs should set up filters. To start this **"RESET"** should be selected. Once this has been done OSs can add and remove the following filters. These standard filters are pictured in fig 18.
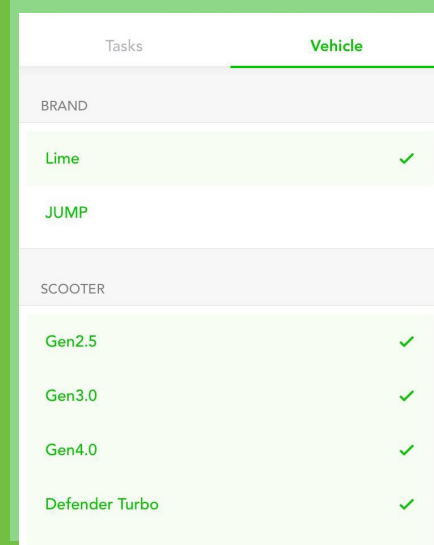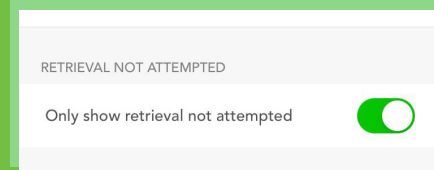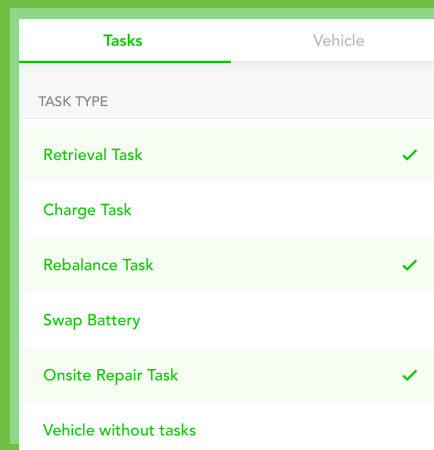
Task Type
• Charge Task (Remove)
• Swap Battery (Remove)
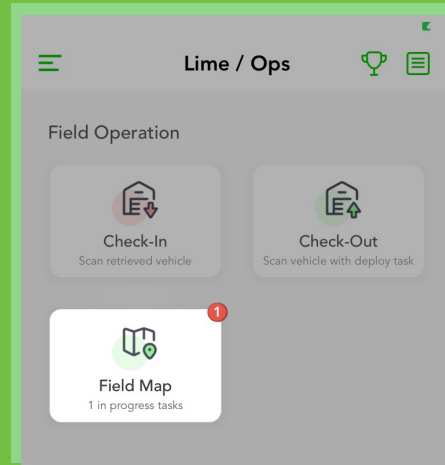• Vehicle Without Tasks (Remove)
Retrieval Not Attempted
• Toggle On (Add)
Vehicle Brand
• JUMP (Remove)

Operations Application
Scooter Filters
fig 18

Operations Application
Field Map Navigation
fig 19

Finding Scooters

OSs should zoom out so the entire service area is visible. This is done so scooters that are outside of the service area can be identified. After the zoom is appropriately set, refresh the application and wait for tasks to appear on the map.

Once the map has refreshed colored pins will appear. These represent scooters in need of service.

Reserving, Navigating and Collecting Scooters

To reserve and navigate to a scooter click on one of the pins on the map. A menu with information about the scooter will appear at the top of the map. Select the **"Claim (X) points"** button to make sure the scooter is unavailable to other OSs, LPs or Juicers. Claiming the scooter will also bring up the option to navigate to, ring and view a last image to assist in finding the scooter. This is shown in fig 20.

After arriving at the location and finding the scooter, use the green center button in the Operations Application to bring up a **"Scan to Collect"** option. Scan the QR code on the scooter's handlebars and it will unlock and make a sound to indicate it has been collected.

When loading and unloading refer to fig 21.5 for proper lifting forms.

Returning scooters to the Warehouse

When returning to the warehouse follow these simple steps to maintain warehouse flow.

1. Check in all scooters
2. Check in any spare batteries
3. Remove all batteries from scooters
4. Put all batteries into carrying cases
5. Move all batteries into the "Dead Battery" area
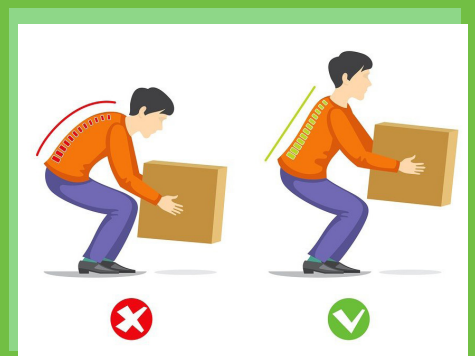6. Move all scooters to the "Diagnose" area

If a battery cannot be removed, move the scooter with the battery still inserted to the diagnose area. "Check-In" is used for both scooters and batteries. The "Check-In" button in the operations application can be seen in fig 21.
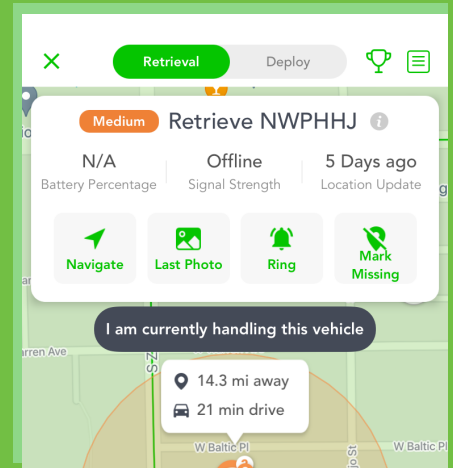
Operations Application Claim and Navigate fig 20
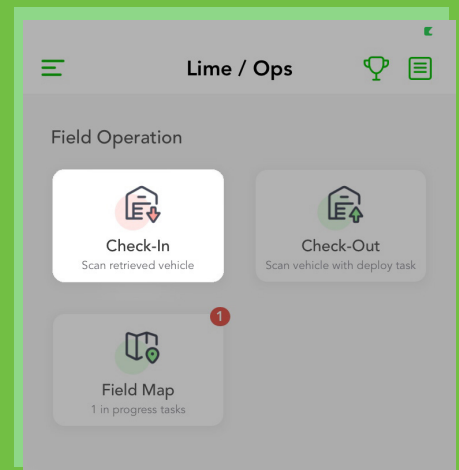
Operations Application Check In Navigation fig 21

Lifting Heavy Objects fig 21.5

nh

Tidying Routes in Downtown Areas

Introduction
In this section OSs will learn about tidying and rebalancing. OSs will learn how to identify scooters that are parked inappropriately, scan and unlock Scooters so they can be moved and learn how to rebalance scooters that are in working condition.

Rebalance/Tidying Areas
At the end of this section there are maps showing the routes assigned to each OS shift. All OSs should be using the pre-planned routes to complete a tidying/ rebalance run after all other priority items in this manual have been completed.

Identifying Scooters That Need Attention
To identify scooters that need to be moved or picked up OSs will be considering the following. All Lime scooters in Colorado Springs must be:

- 1.5 feet from the edge of the curb
- 3 ft away from curb in parking situations
- Allowing for 6 feet of walking space on Tejon
- 3 feet away from fire hydrants
- Evenly spaced and presentable
- Standing upright using a kickstand
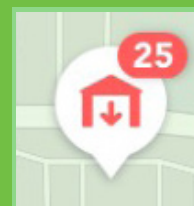- Away from PikeRide stations

If a parked scooter does follow the above guidelines it should be rebalanced. Park in the closest location and prepare to pick up or move the scooter.
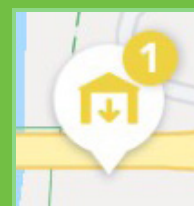

Example Bad Parking fig 22
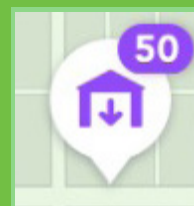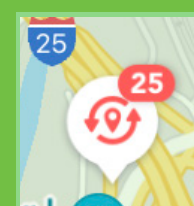

Highest Priority

High Priority

Medium Priority

Low Priority

Untasked Scooter

Rebalance Task

Scanning Untasked Scooters

To track that tasks have been completed OSs need to scan scooters in the Operations Application. However not every scooter that needs to be moved will have a task assigned to it. To account for this use the **"Scan To Collect"** button to scan the scooter's QR code. Scanning an untasked scooter like this will bring up a menu allowing for a variety of options.

If the scooter is broken select **"Retrieve - Broken Vehicle"**. If it is not broken the scooter needs to be moved to an appropriate location. To start this process OSS will use the **"Scan To Collect"** section of the Operations Application. The scooter should be marked as **" Rebalance - GR Issue"**.

Rebalancing Scooters

After picking up the scooter OSs should use the deploy section of the field map. This will provide locations where an OS can rebalance a scooter.

To finish rebalancing navigate to a deployment hub. After arriving an OS should scan the scooter's QR code with **"Scan To Deploy"**. This will make scooters available to customers. To make sure a scooter has been deployed OSs can check the scooter's status. This is done by using the **"Scan"** feature on the main page of the Operations Application. This will provide information about the scooter including the operational status. If a scooter cannot be successfully deployed/rebalanced using the Operations Application, return it to the warehouse.
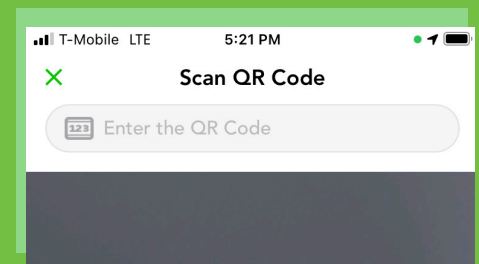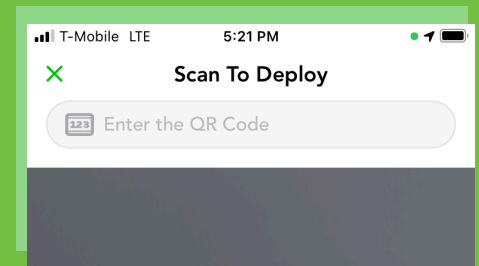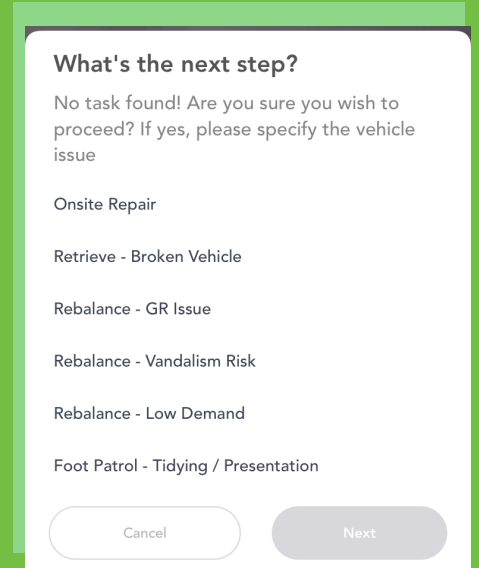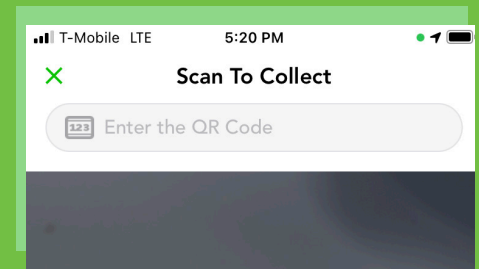
Operations Application
Scan To Collect
Collection Menu
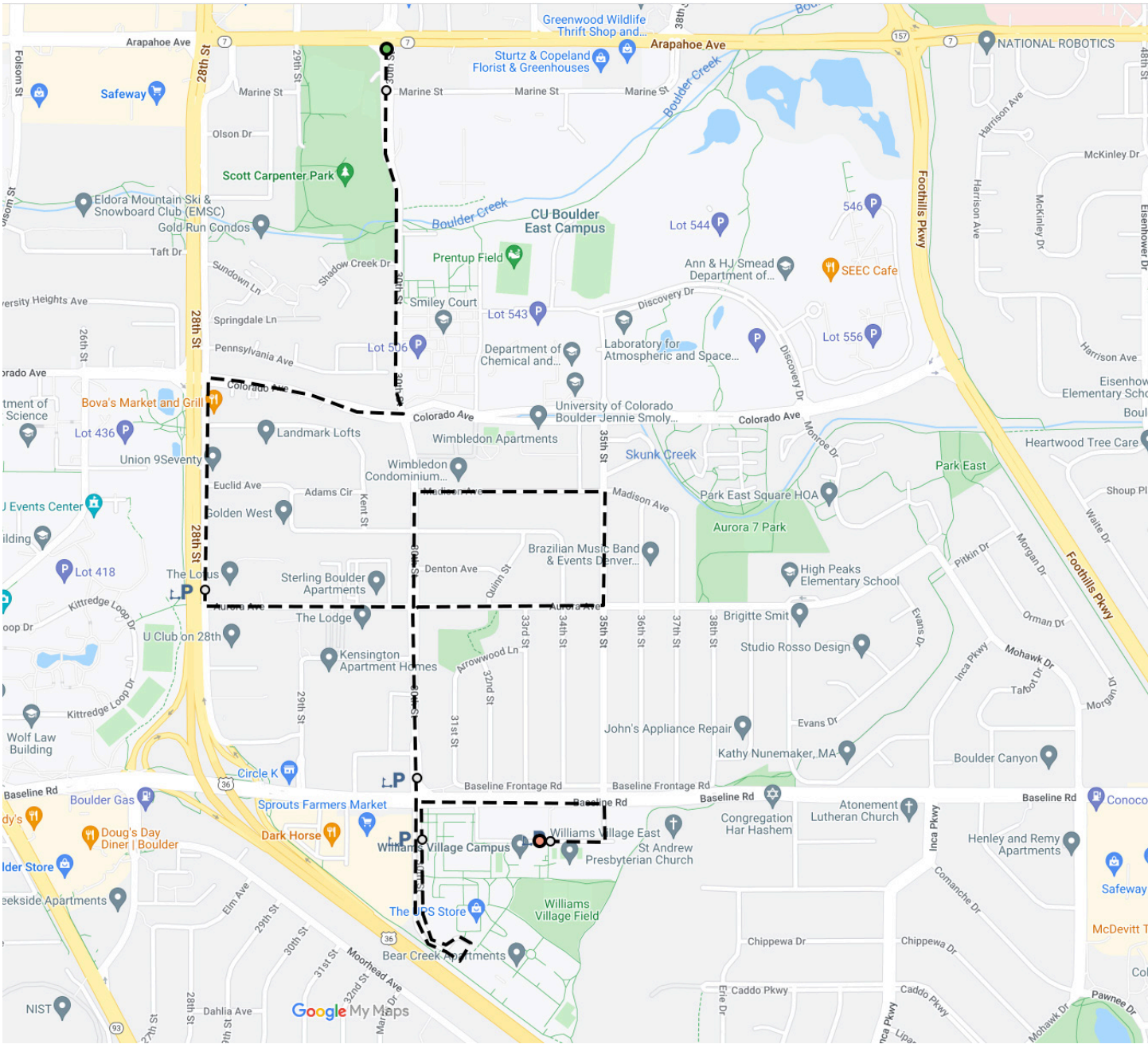*Scan To Deploy*
Scooter Information Scan
fig 22.5

Tidying Routes in Downtown Areas
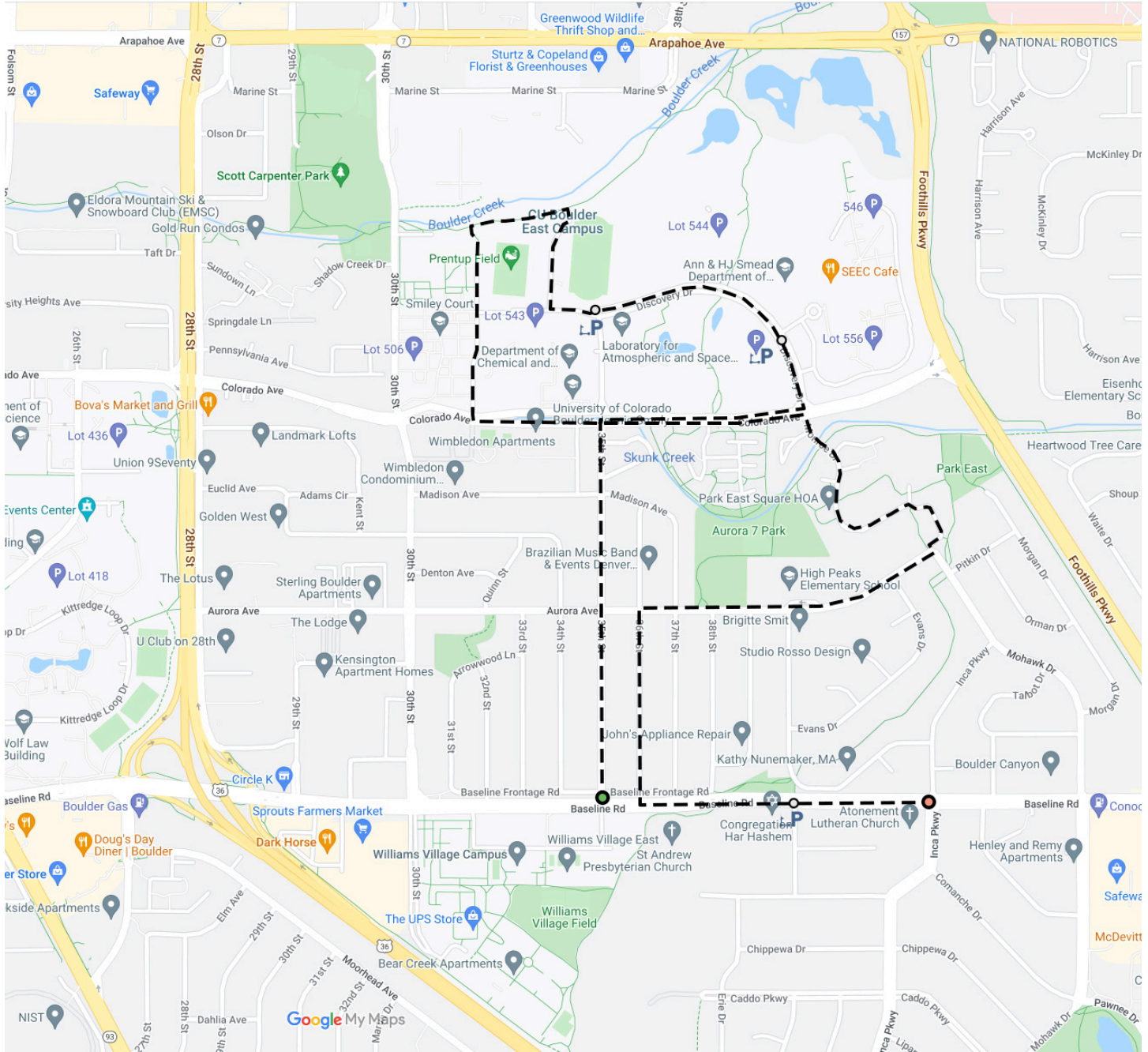## (Maps)

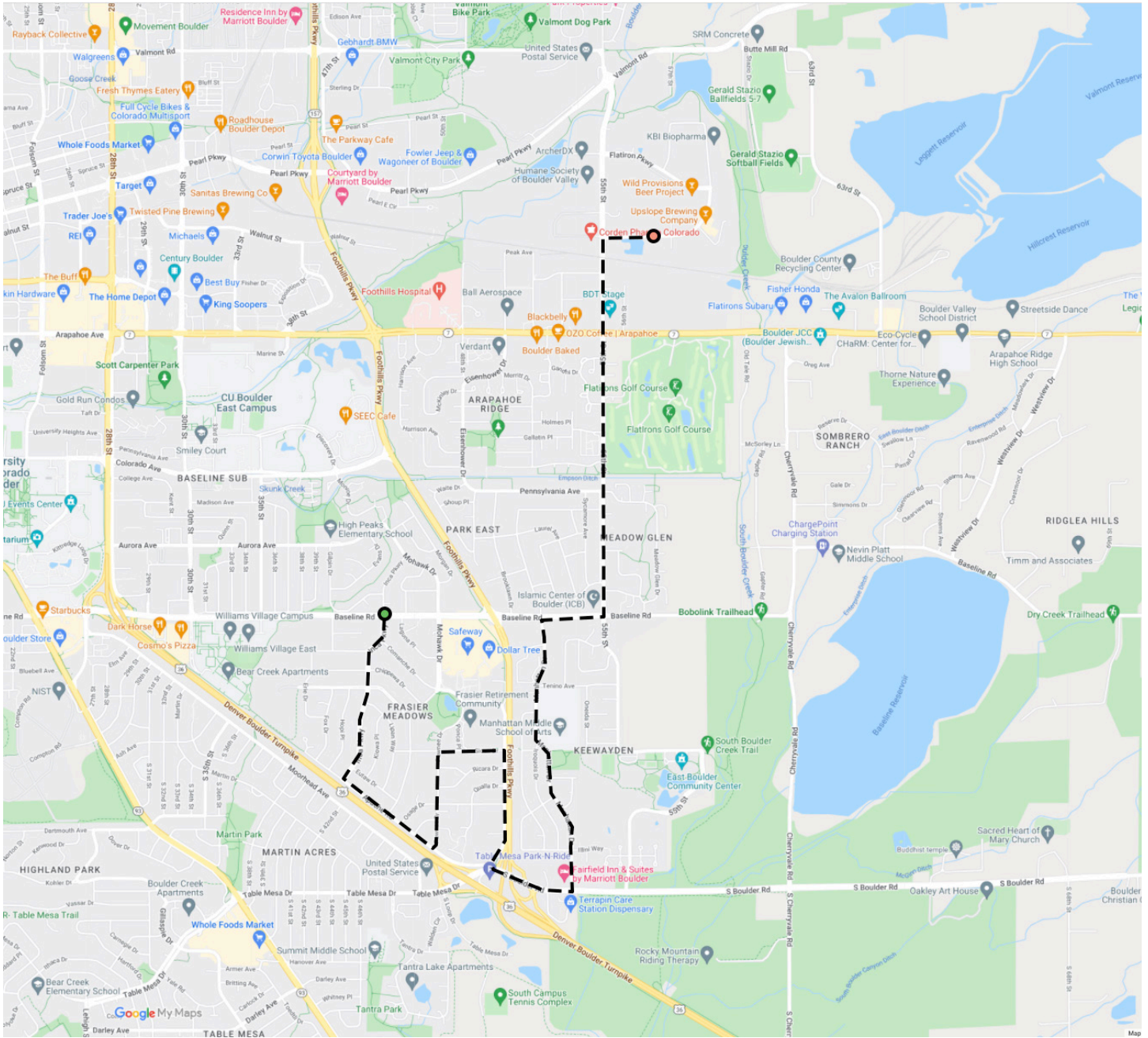# Rebalancing Route 1
1st Shift (9am-5pm)
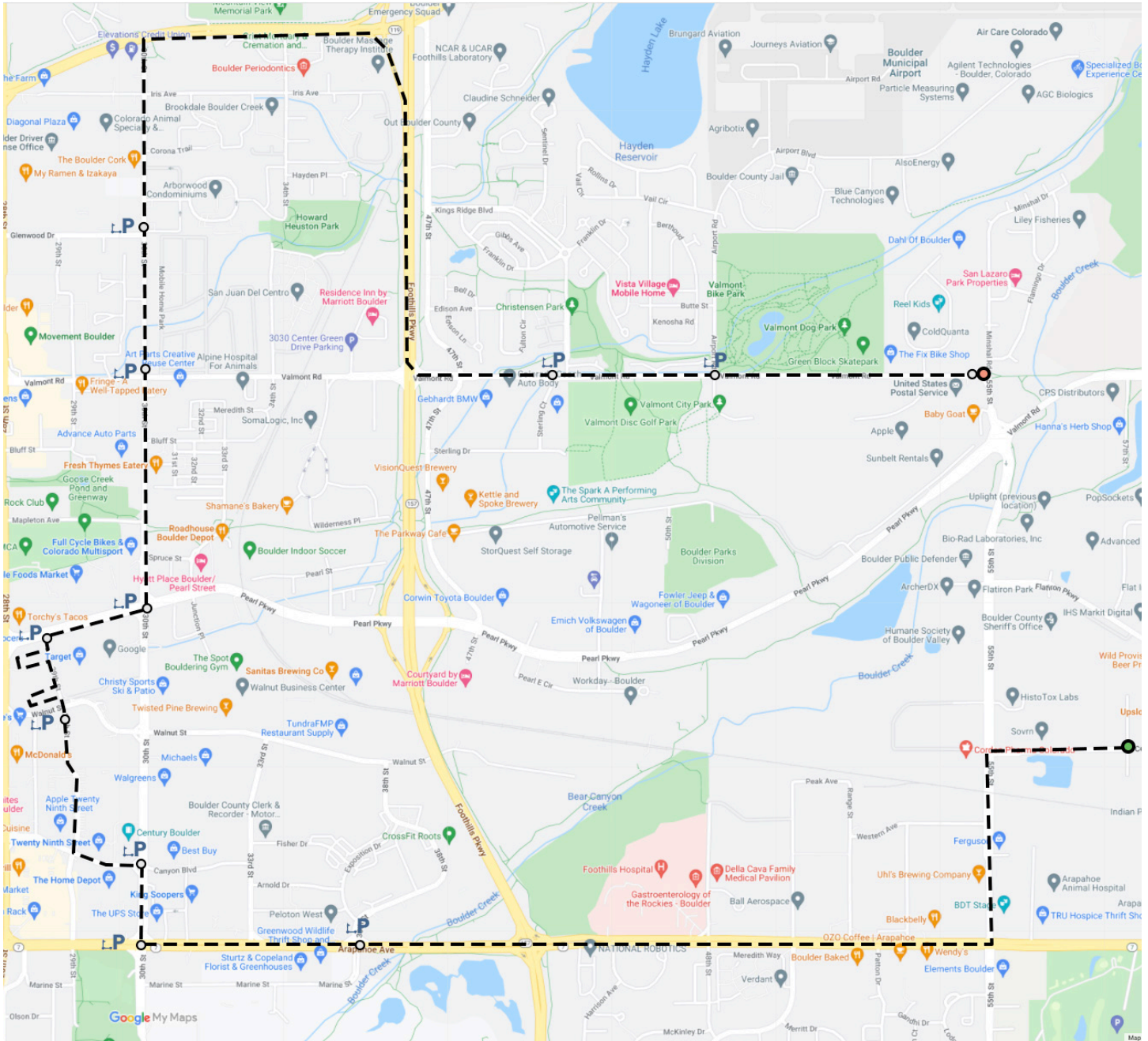
Rebalancing Route 2
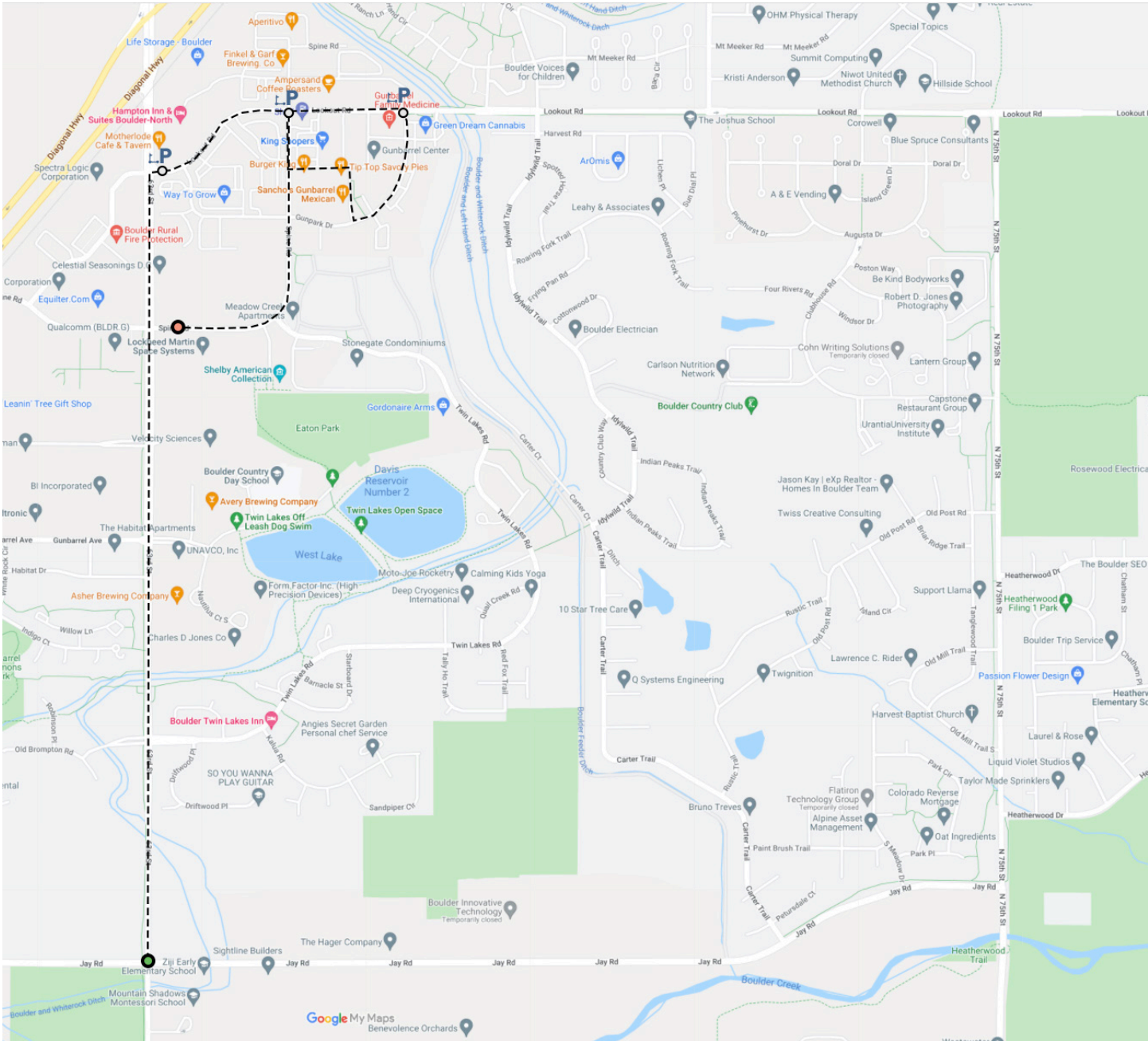## 1st Shift (9am–5pm)

Rebalancing Route 3
1st Shift (9am-5pm)

Rebalancing Route 4
1st Shift (9am–5pm)

Rebalancing Route 5
1st Shift (9am–5pm)

Index

Index

Shift Start Message
- <u>Available LP Batt Swaps</u>: The number of scooters in Denver that have low battery.
- <u>Available:</u> Scooters that are operational and available to consumers.
- <u>Battery Swap Threshold</u>: The percentage at which a battery swap task is created.
- <u>In Trip</u>: Scooters in the service area being used by consumers.
- <u>Juicer Held</u>: Scooters currently held by our LPs or Juicers
- <u>Max Cap</u>: The total number of scooters allowed within the service area.
- <u>Metrics</u>: Numbers or values assigned to different categories.
- <u>Needed for Cap</u>: The number of scooters that need to be deployed in order to make up the difference between Total Scooters and Max Cap.
- <u>OS</u>: Operations Specialist
- <u>SOP</u>: Standard Operating Procedure
- <u>Total Scooters</u>: The sum of Juicer Held, Available, In Trip and Unavailable scooters.
- <u>Unavailable</u>: Scooters that are unavailable to consumers but not picked up by OSs, LPs or Juicers

Customer Service Tickets
- <u>Backlog</u>: The status of a ticket. When a CX ticket needs to be completed.
- <u>City Ticket</u>: Is a request or complaint submitted by the city of Denver. Must be completed within 2 hours.
- <u>Completed</u>: When a ticket has been completed.
- <u>CX Ticket</u>: Is a request or complaint submitted by a consumer or member of the public body.
- <u>Jira</u>: Is an application used to view CX and City Tickets.
- <u>Open</u>: The status of a ticket. When a city official identifies a potential violation of contract they create an open ticket.
- <u>Pending</u>: When a ticket is in open or pending OSs have 2 hours to complete it.
- <u>Unactionable</u>: When a ticket cannot be completed because the issue did not exist or was resolved prior to arrival.
- <u>Violation</u>: The status of a ticket. When an OS does not complete a City Ticket within 2 hours.

Deployments
- <u>Batch Mode</u>: Refers to a section in the operations application that allows for quick scanning of vehicles.
- <u>Check Out</u>: Refers to the scanning of batteries or scooters before they are taken from the warehouse.
- <u>Deploy Task</u>: Refers to the task type OSs create to make scooters available for pick up for Juicers or LPs.
- <u>Deployment Area</u>: The area where OSs put scooters so they can be picked up by LPs or Juicers.
- <u>Deployment Window</u>: Set times during the day where OSs create deploy tasks on scooters.
- <u>Juicer</u>: A 1099 contractor who retrieves and deploys our vehicles.
- <u>LP (Logistics Partner)</u>: An LLC who Lime partners with to conduct battery swaps, retrevals, moves and deployments on our vehicles.

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Urgent Attention Scooters
- **Urgent Attention Scooters**: A Slack channel in the Colorado Springs LP workspace where LPs post about broken or malfunctioning scooters in the field
- **Urgent Attention Vehicels**: Vehicles that have issues requiring OS attention.
- **Urgent Attention Vehicle Request**: A Slack post indicating an issue with a Lime vehicle that needs to be completed by an OS.

Priority Vehicles
- **High Priority Scooters(Red)**: Scooters that need to be retrieved within 24 hours of appearing in the Operations Application.
- **Highest Priority Scooters (Purple)**: Scooters that need to be retrieved within 24 hours of appearing in the Operations Application.
- **In/Out of Service**: Is the operating status of a scooter.
- **Low Priority Scooters (Yellow)**: Scooters that are not a priority at all.
- **Medium Priority Scooters (Orange)**: Scooters that need to be picked up but are not an immediate priority.
- **Priority Vehicles**: Scooters that are marked by Lime's automated system or manager as important tasks.
- **Untasked Scooters (Grey)**: Scooters that have no task assigned to them.

Tidying Routes in Downtown Areas
- **Ridership**: The amount of customers riding vehicles at any given time.
- **Tidying**: The act of straightening or picking up scooters that are misplaced or badly parked.
- **Rebalancing**: The act of moving scooters from one location to another.