LOCATOR
TICKET MANAGEMENT

BASIC

ONE CALL CONCEPTS
When safety is on the line.

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ONE CALL CONCEPTS
When safety is on the line.
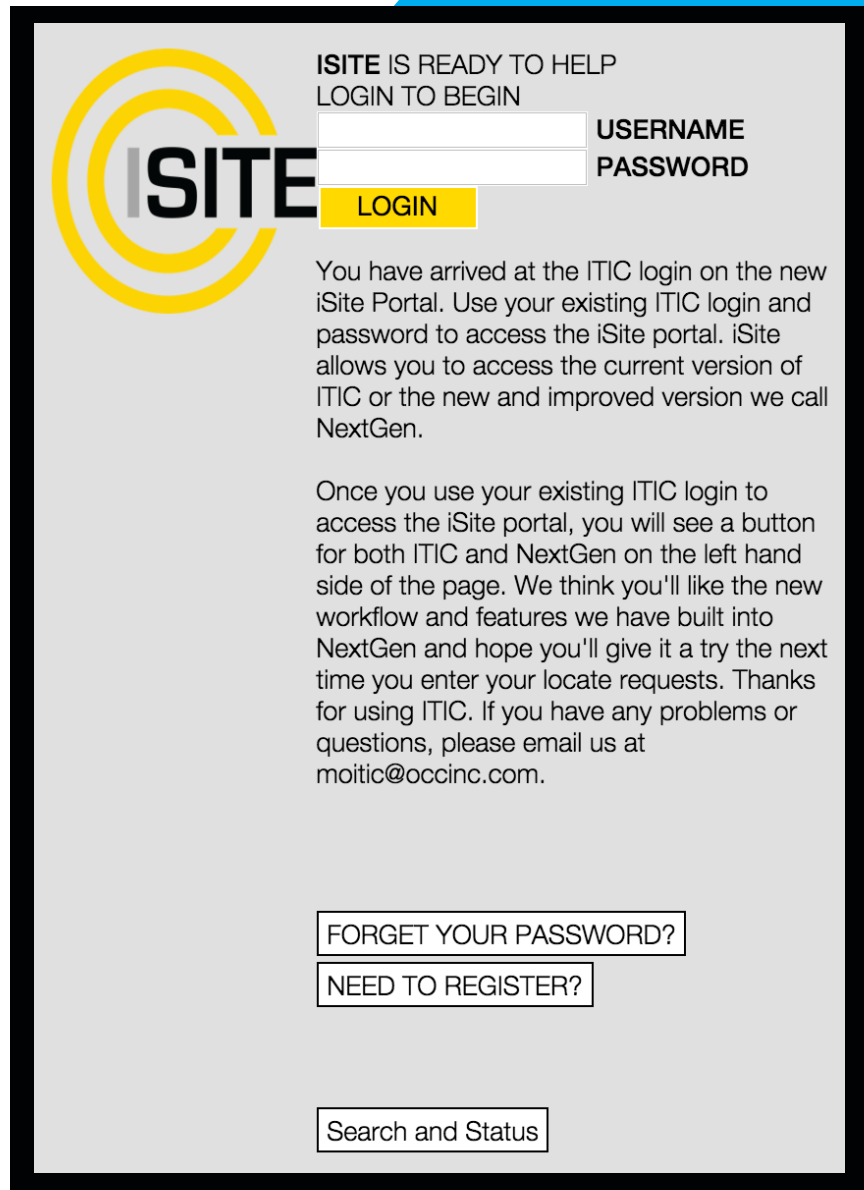
LTM INTRODUCTION AND LOGGING IN

Locator Ticket Management (LTM) is a completely web-based tool that provides an online portal for locators to manage all of their tickets, for any state, with a single log-in. This manual will provide you with a guide for using the many functions available in Locator Ticket Management.

To access Locator Ticket Management you will need to log in to iSite, One Call Concept's single-stop web portal. If you do not have a login and password go to http://sandbox.occinc.com/isite/ and click the **NEED TO REGISTER?** button located below the login and password fields. If you have forgotten your login information, you can also click the **FORGOT YOUR PASSWORD?** link, also located below the login and password fields. Once you enter your password and login and hit return, you'll be logged in to iSite.

LOGGING IN

ISITE IS READY TO HELP
LOGIN TO BEGIN

USERNAME
PASSWORD

LOGIN

You have arrived at the ITIC login on the new iSite Portal. Use your existing ITIC login and password to access the iSite portal. iSite allows you to access the current version of ITIC or the new and improved version we call NextGen.

Once you use your existing ITIC login to access the iSite portal, you will see a button for both ITIC and NextGen on the left hand side of the page. We think you'll like the new workflow and features we have built into NextGen and hope you'll give it a try the next time you enter your locate requests. Thanks for using ITIC. If you have any problems or questions, please email us at moitic@occinc.com.

FORGET YOUR PASSWORD?

NEED TO REGISTER?

Search and Status

LOCATOR
TICKET MANAGEMENT

LTM INTRODUCTION AND LOGGING IN - CONTINUED

Once logged in to iSite click the **LOCATOR TICKET MANAGEMENT** button in the upper-left corner of the page. This will bring you to the Ticket Management page.

NextGen®

LOCATOR
TICKET MANAGEMENT

MESSAGES

LOGOUT

NextGen®

SANDBOX
FOR TESTING PURPOSES ONLY
LIVE TICKETS WILL NOT BE CREATED

Contact | Help | Chat

PLEASE MAKE YOUR SELECTION . . .

XX | MD

⊖ **CALLER INFORMATION**

⊖ **PROFILE INFORMATION**   **Creating a profile before filing tickets will be very helpful and is strongly recommended.**

ONSITE NAME

ONSITE PHONE

PURPOSE OF EXCAVATION

TYPE OF EQUIPMENT

LOCATOR
TICKET MANAGEMENT

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TICKET MANAGEMENT PAGE

The Ticket Management Page is the main interface for Locator Ticket Management. Let's take a look at the different functions available to you.

ISITE Home (Button)
Clicking this button will return you to the iSite Main Menu.

Admin (Button)
Clicking this button will bring you to the Locator Ticket Management Administration Menu.

Contact (Button)
Will display a page with contact information for the call center.

Help (Button)
Will display a page with links to training materials.

Ticket Management Menu
These fields allow you to narrow down the list of tickets received by your company.

LOCATOR TICKET MANAGEMENT

ONE CALL CONCEPTS
When safety is on the line.

| ISITE Home | Contact | Help |
| Admin | Reports | Chat |

You have 1 unviewed emergency ticket
iSite User: occls-dwalters

Map Tickets | Print Tickets

Change Current Display

Ticket Set: All Tickets in Production
District Code: All Districts
Refine Search: Select Field = + ✏

Date Received Between: 11/16/2015 and 11/23/2015 | Show Tickets

Emergency Notice
If you have any unviewed emergency tickets a flashing red notice will appear under the iSite Menu bar. Clicking the notice will display a list of unviewed emergency tickets.

Reports (Button)
Clicking this button will bring you to the Reports menu.

Print Tickets (Button)
Clicking this button will show all currently displayed tickets in a print-ready format.

Chat (Button)
Clicking this button will connect you with the Live Help Chat function. Live Help Chat is only available during normal business hours.

Map Tickets (Button)
Clicking this button will show all currently displayed tickets in a geographical context.

LOCATOR TICKET MANAGEMENT

ONE CALL CONCEPTS
When safety is on the line.

TICKET MANAGEMENT PAGE

On the Ticket Management screen you can display a list of tickets sent to your company that are currently in the system. You can sort them in a variety of different ways. Let's look at how you can do that now.

LOCATOR TICKET MANAGEMENT

ONE CALL CONCEPTS
When safety is on the line.

| ISITE Home | Contact | Help |
| Admin | Reports | Chat |

You have 1 unviewed emergency ticket
iSite User: occls-dwalters

Map Tickets | Print Tickets

Change Current Display

Ticket Set: All Tickets in Production
District Code: All Districts
Refine Search: Select Field = + ✐
Date Received Between: 11/16/2015 and 11/23/2015   Show Tickets

⚠ Emergency | 👁 Viewed Emergency | ✚ Priority | ➤ Meeting | 🕐 Past Due | 🔒 Locked | Multiple Auto-Assignments

---

Select Ticket Set

Choose the ticket set you'd like to display on the Ticket Management screen from the options available in the drop-down box.

LOCATOR TICKET MANAGEMENT

✔ **All Tickets in Production**
   Cancelled Tickets
   Open Emergencies
   Open Tickets
   Open Tickets Due Today
   Open Tickets Due within 2 Business Days
   Tickets available for Statusing
   Tickets without Responses

Map Tickets | Print Tickets

Change Current Display

Ticket Set: All Tickets in Production
District Code: All Districts
Refine Search: Select Field = + ✐
Date Received Between: 11/16/2015 and 11/23/2015   Show Tickets

⚠ Emergency | 👁 Viewed Emergency | ✚ Priority | ➤ Meeting | 🕐 Past Due | 🔒 Locked | Multiple Auto-Assignments

LOCATOR TICKET MANAGEMENT

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Select District Code

If you have more than one district code linked to your login for Locator Ticket Manager, you can choose to filter tickets by a particular district code.

LOCATOR
TICKET MANAGEMENT

ONE CALL CONCEPTS
When safety is on the line.

| ISITE Home | Contact | Help |
| Admin | Reports | Chat |

You have 1 unviewed emergency ticket
iSite User: occls-dwalters

✓ All Districts
MD - CBW02 (BALTIMORE CITY DPW-OCCLS)
MD - CBW04 (BALTIMORE CITY DPW-OCCLS)
MD - CBW05 (BALTIMORE CITY DPW-OCCLS)

Map Tickets   Print Tickets

Change Current Display

Ticket Set: All Tickets in Production
District Code: All Districts
Refine Search: Select Field   =   + ⬛
Date Received Between: 11/16/2015   📅 and 11/23/2015   📅   Show Tickets

⚠️ Emergency   👁 Viewed Emergency   ➕ Priority   ➤ Meeting   🕐 Past Due   🔒 Locked   Multiple Auto-Assignments

---

Refine Search (Optional)
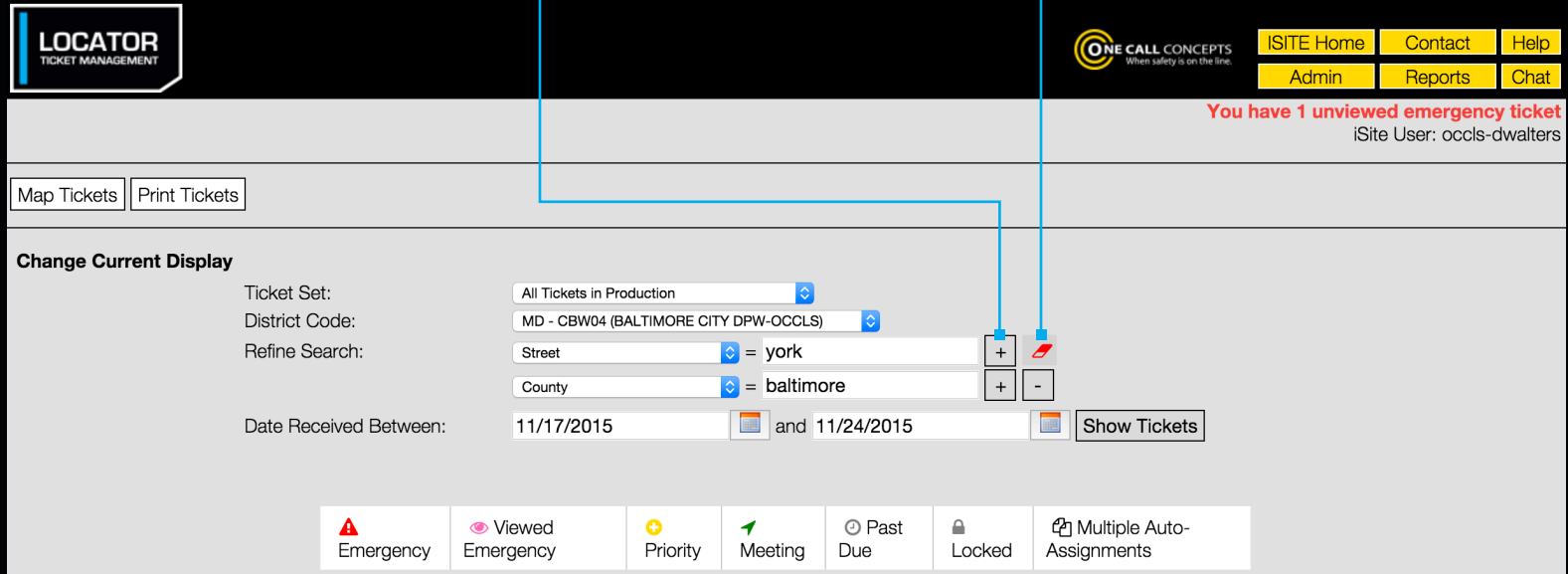
This optional step lets you refine your ticket search based on a variety of parameters.

LOCATOR
TICKET MANAGEMENT

Help
Chat

ency ticket
cls-dwalters

Map Tickets   Print Tickets

Change Current Display

Ticket Set: All Tickets in Production
District Code: MD - CBW04 (BALTIMORE CITY DPW-OCCLS)
Refine Search: Select Field   =
Date Received Between: 11/17/2015   📅 and 11/24/2015

Select Field
Caller Provided Grid
Caller Provided Map
Caller Provided Page
Company Name
Could've Auto-Assigned to Another Locator (Y/N)
County
Expire Date
Locator
Map Generated Grid
Map Generated Map
Map Generated Page
Place
Status
✓ Street
Status
Ticket Header
Ticket Number
Type Of Work
Work Begin Date

⚠️ Emergency   👁 Viewed Emergency   ➕ Priority   ➤ Meeting   🕐 Past Due

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Click the **+** button to refine your search by additional criteria.

Click the ⬛ button to clear all Refine Search criteria.

LOCATOR TICKET MANAGEMENT

ONE CALL CONCEPTS When safety is on the line.

You have 1 unviewed emergency ticket
iSite User: occls-dwalters

Map Tickets | Print Tickets

Change Current Display

Ticket Set: All Tickets in Production
District Code: MD - CBW04 (BALTIMORE CITY DPW-OCCLS)
Refine Search: Street   =   york   + ⬛
    County   =   baltimore   + -
Date Received Between: 11/17/2015 📅 and 11/24/2015 📅   Show Tickets

⚠ Emergency   👁 Viewed Emergency   ➕ Priority   ✈ Meeting   ⏱ Past Due   🔒 Locked   ⧉ Multiple Auto-Assignments

---

Refine Date Range

Refine your date range to what you'd prefer – simply select the start and end dates you'd like to search for tickets within.

LOCATOR TICKET MANAGEMENT

ONE CALL CONCEPTS When safety is on the line.

You have 1 unviewed emergency ticket
iSite User: occls-dwalters

Map Tickets | Print Tickets

Change Current Display

Ticket Set: All Tickets in Production
District Code: MD - CBW04 (BALTIMORE CITY DPW-OCCLS)
Refine Search: Street   =   york   + ⬛
    County   =   baltimore   + -
Date Received Between: 11/18/2015 📅 and 11/18/2015 📅   Show Tickets

⚠ Emergency   👁 Viewed Emergency   ➕ Priority   ✈ Meeting   ⏱ Past Due   🔒 Locked   ⧉ Multiple Auto-Assignments

LOCATOR TICKET MANAGEMENT

ONE CALL CONCEPTS When safety is on the line.

Clicking on **"SHOW TICKETS"** will generate a list of tickets based on the parameters you've specified in the previous fields.

LOCATOR TICKET MANAGEMENT

ONE CALL CONCEPTS When safety is on the line.

ISITE Home	Contact	Help
Admin	Reports	Chat

You have 1 unviewed emergency ticket
iSite User: occls-dwalters

Map Tickets | Print Tickets

Change Current Display

Ticket Set: All Tickets in Production

District Code: MD - CBW04 (BALTIMORE CITY DPW-OCCLS)

Refine Search: Street = york +
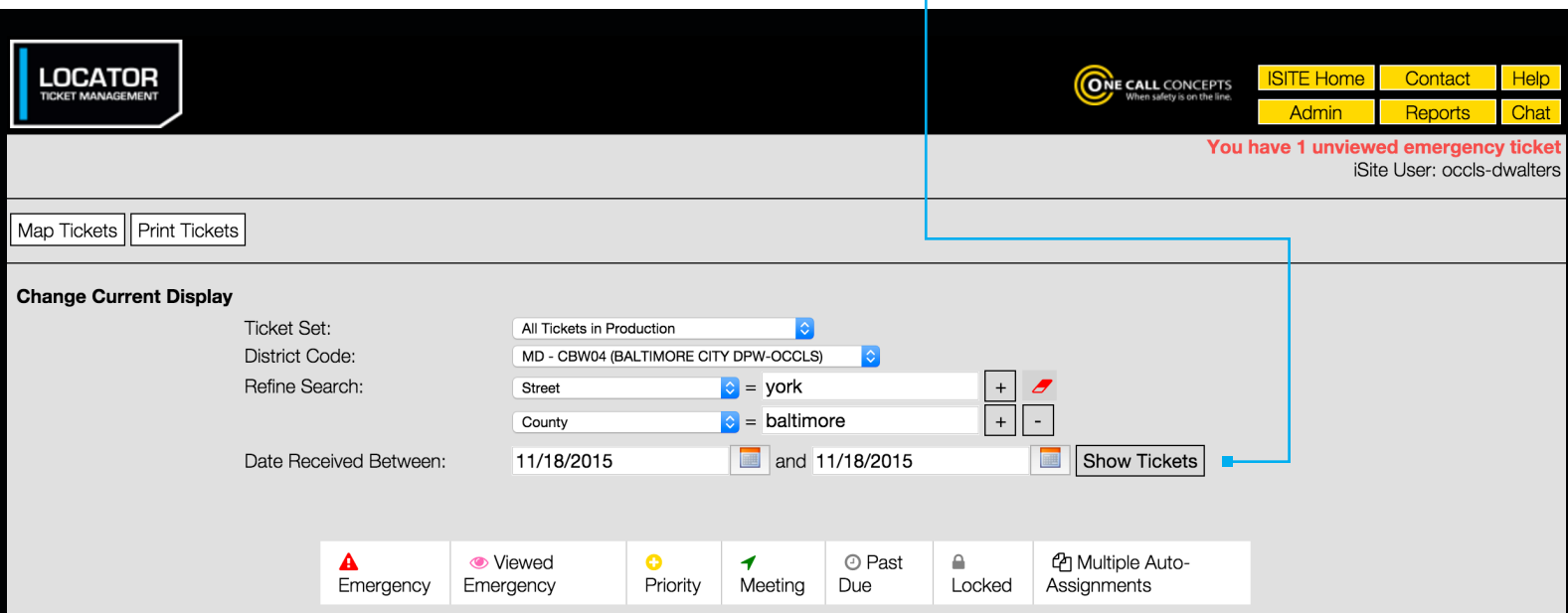
County = baltimore + -

Date Received Between: 11/18/2015 and 11/18/2015 Show Tickets

⚠ Emergency	👁 Viewed Emergency	➕ Priority	✈ Meeting	🕐 Past Due	🔒 Locked	⧉ Multiple Auto-Assignments

5 ticket records found

Tickets for District MD - CBW04
(11/18/2015 to 11/18/2015)

# ↑↓	Orig Call ↑↓	Begin ↑↓	Street ↑↓	City ↑↓	County ↑↓	ST ↑↓	District ↑↓	Loc ↑↓	Status ↑↓
15759592 🔒	11/18/15 07:18	11/20/15	700 YORK RD	TOWSON	BALTIMORE	MD	CBW04	46	Marked
15759595 🔒	11/18/15 07:19	11/20/15	1040 YORK RD	TOWSON	BALTIMORE	MD	CBW04	46	Marked
15760336	11/18/15 09:22	11/20/15	305 YORK ROAD	TOWSON	BALTIMORE	MD	CBW04	46	Marked
15760481	11/18/15 09:39	11/20/15	2352 YORK ROAD	MIDDLE RIVER	BALTIMORE	MD	CBW04	46	Not yet responded
15762466	11/18/15 17:12	11/20/15	10249 YORK RD	COCKEYSVILLE	BALTIMORE	MD	CBW04	46	Not yet responded

You should see a list of tickets below the display options. If you don't, choose other parameters to search by. The list of tickets will display a variety of information including the total number of tickets matching your search parameters, the ticket number for each ticket, and the date & time when the ticket was originally filed.

Clicking on a ticket number will display the complete ticket information.

LOCATOR TICKET MANAGEMENT

ONE CALL CONCEPTS When safety is on the line.

VIEWING A TICKET

After clicking on a ticket number you will be presented with a page containing all available ticket information. This will also be your primary interface for updating statuses, assigning locators, and adding internal notes and statistics.

Ticket List (Button)
Click this button to return to the ticket list.

Retransmit (Button)
Click this button to retransmit the ticket information to the selected district.

Add Private Attachment (Button)
Click this button to upload a file attachment to the ticket. Private attachments cannot be viewed by the general public.

Members Notified
This section will contain a full list of the member utilities who were notified by the ticket. *(If your account has access to multiple utility districts you can switch between them by clicking on the corresponding button.)*

Locator Information
This section contains information pertinent to locators, and will not be visible to the public.

LOCATOR TICKET MANAGEMENT

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ISITE Home   Contact   Help
Admin   Reports   Chat

You have 1 unviewed emergency ticket
iSite User: occls-dwalters

Ticket List | Update Of

Miss Utility

Ticket No:	15760481		STANDARD
Update of:	15729580	**Update Counter:**	1
Original Call Date:	11/18/15 09:39 am		
Work to Begin Date:	11/20/15 11:59 pm	**Expiration Date:**	12/08/15 23:59 pm

TICKET ACTIONS

Retransmit | Add Private Attachment

CALLER INFORMATION

Company Name:	OLNEY MASONRY CORP	**Fax Phone:**	301-937-4366
Contact Name:	JANICE PITEIRA	**Phone:**	301-937-3200
Caller Address:	6701 AMMENDALE ROAD BELTSVILLE,MD 20705		
Email Address:	janisp98@hotmail.com		
Job Site Contact:	MIKE CISSEL	**Phone:**	301-674-4708

DIG SITE INFORMATION

Type of Work:	REMOVING & REPLACING SIDEWALK, CURB & GUTTER
Work Being Done For:	BALTIMORE COUNTY D.P.W.
Explosives:	N
Permit:	**MDOT Permit:**
Job Number:	

DIG SITE LOCATION

State:	MD	**County:**	BALTIMORE
Place:	MIDDLE RIVER	**Subdivision:**	
Address:	2352		
Street:	YORK ROAD		
Intersecting Street:	E MAIN BLVD		
Extent of Work:	LOCATE/MARK: ON THE W MAIN SIDE		
Remarks:			
Map Coord NW Lat:	39.4533333	**Lon:**	-76.6333333
SE Lat:	39.4500000	**Lon:**	-76.6300000

MEMBERS NOTIFIED

	District	Company Name	Marking Concerns	Damage	Customer Service	
	BGEBA	BGE ELECTRIC-USIC	410-685-0123	410-685-0123	800-778-9140	Not yet responded
	BGEBAG	BGE GAS-USIC			800-778-9140	Not yet responded
	BPW01	BALTIMORE COUNTY DPW	410-887-7415	410-887-7415	410-887-7415	Clear/No conflict
Viewing	CBW04	BALTIMORE CITY DPW-OCCLS			410-712-0202	Not yet responded
	CTV01	COMCAST - UTILIQUEST	410-616-8540	410-931-4600	410-536-0070	Not yet responded
	HTV02	COMCAST- FIBER/UTILIQUEST	888-239-0172	410-427-9600	410-536-0070	Not yet responded
	VBT	VERIZON	410-712-0202	410-712-0202	410-536-0070	Clear/No conflict

LOCATOR INFORMATION

Past Work Start? Y   Ticket Locked? N   Past Due Time: 11/20/15 23:58

Add Public Attachment | Add Private Attachment

Private Attachments
None

Public Attachments
None

Locator:
46 - Steve Oneill

Status
Current Status: Not yet responded
Update Status:
--

Status Comments

Save and Return to Ticket List

Save and Stay on This Ticket

LOCATOR TICKET MANAGEMENT

ONE CALL CONCEPTS
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Private Attachments
If there are any private files attached to the ticket they will be listed here.

Public Attachments
If there are any public files attached to the ticket they will be listed here.

Locator (Drop - Down)
Use this menu to assign a locator to this ticket.

Status
This drop-down menu allows you to update the utility response status of the ticket.

Status Comments
This section is for notes on the status of the ticket.

Save and Return to Ticket List (Button)
Clicking this button will save the changes you have made to the ticket, and then return you to the Ticket Management page.

Save and Stay on This Ticket (Button)
Clicking this button will save the changes you have made to the ticket.

Custom Response
This section will contain any custom items that have been created for your company.

LOCATOR INFORMATION

Past Work Start? Y   Ticket Locked? N   Past Due Time: 11/20/15 23:58

| Add Public Attachment | Add Private Attachment |

Private Attachments
None

Public Attachments
None

Locator:
46 - Steve Oneill

Status
Current Status: Not yet responded
Update Status:
--

Status Comments

| Save and Return to Ticket List |
| Save and Stay on This Ticket |

Custom Response
Water Mains: (numeric)
Water Services: (numeric)
Hydrants: (numeric)
Flagged: --
Plat Number:

Code 5 Contact Name:

Code 5 Contact Phone Number:

Code 5 Contact Date (mm/dd/yy):

Code 5 Call Time (hh:mm)(24 hour clock):

Code 5 Reason:

Possible Private Locate? Enter type of utilities.:

Billing Codes:
--
Additional Units:

Your view of this ticket is   Open

Notes
| Confirmed Emergency | Riggs | No Response |

History

Date	Type	District	Display	Locator	User
11/24/15 00:04:05	Subsequent No Response	CBW04 BALTIMORE CITY DPW-OCCLS			
11/21/15 00:04:06	Initial No Response	CBW04 BALTIMORE CITY DPW-OCCLS			
11/21/15 00:02:05	Ticket Status-EMAIL				
11/18/15 09:41:05	Locator Assigned	CBW04 BALTIMORE CITY DPW-OCCLS		Steve Oneill	System
11/18/15 09:40:00	Ticket Created				System

Notes
This section is for miscellaneous notes. If you have created quick notes on your account they will appear here.

History
This table contains a summary of all changes made to the ticket.

LOCATOR
TICKET MANAGEMENT

ONE CALL CONCEPTS
When safety is on the line.

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Interactive Map
The interactive map will show you a visual representation of the mapping done on the ticket, and allows for several options.

Popup Map (Button)
Clicking this button will open a smaller version of the Interactive Map in its own window.

Hide/Show Map (Button)
Clicking this button will hide the Interactive Map. Clicking this button again will re-display the Interactive Map.

Hide District Polygons (Button)
Clicking this button will hide the district polygons from the interactive map. Clicking again will re-display the district polygons.

Interactive Map

Legend: Locate Polygon
District Polygon

Popup Map | Hide Map | Hide District Polygons

Advance/Alternate Search

Search Map:

Lat/Lon 39.449984
-76.627364

Segment Length

Total Length

Occ
Sat
Google

Placemark
Measure
Identify

Frame Polygon

Occ
Sat
Google

Placemark

Measure

Identify

Frame Polygon

Locate Polygon

Map data ©2015 Google 50 m Terms of Use Report a map error

Search Map (Field)
Enter an address, intersection, or place name in this field to search for it on the Interactive Map.

Advance/Alternate Search (Drop-Down)
The Advance/Alternate search drop-down menu allows for more advanced search options.

Map View (Buttons)
Change the image of the map to the **OCC** map view, **Satellite** view, or **Google** map view (pictured).

Placemark (Button)
Use this function to drop a placemark on the map for personal reference. The Placemark tool can be very helpful when used in conjunction with the Measure tool.

Identify (Button)
Use this function to identify roads, highways, rivers, creeks, etc., on the map that may not show a name. The name will appear in the bottom section of the map next to "Highlight." Zooming in on the map makes more names visible.

Measure (Button)
Use this function to measure the distance between points on the map. Using this tool regularly ensures proper coverage of excavation areas and confirms distances along roads.

Zoom In/Out (Scroll Tool)
Zoom in for more detail by clicking on the plus (+) sign or by dragging the marker up on the bar. **Zoom out** for an increased overall view by clicking on the minus (-) sign or by dragging the marker down on the bar. [You can also zoom in and out by using the middle rolling button on your mouse when your mouse point is on the map.]

Frame Polygon (Button)
Click this button to center the map on the Locate Polygon.

LOCATOR
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MAP TICKETS

The Map Tickets function allows a user to view multiple locate requests in a geographical context.

Once you have narrowed down your list of pending locate requests on the Ticket Management main page, click the **MAP TICKETS** button at the top of the screen.
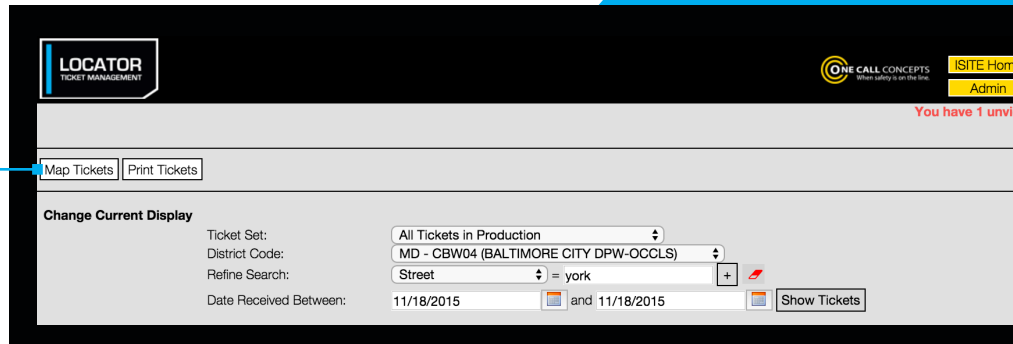
This will bring you to the Map Tickets page, which will display a map of the corresponding area, with 'pin-marks' representing the individual tickets from the list on the previous Ticket Management page.
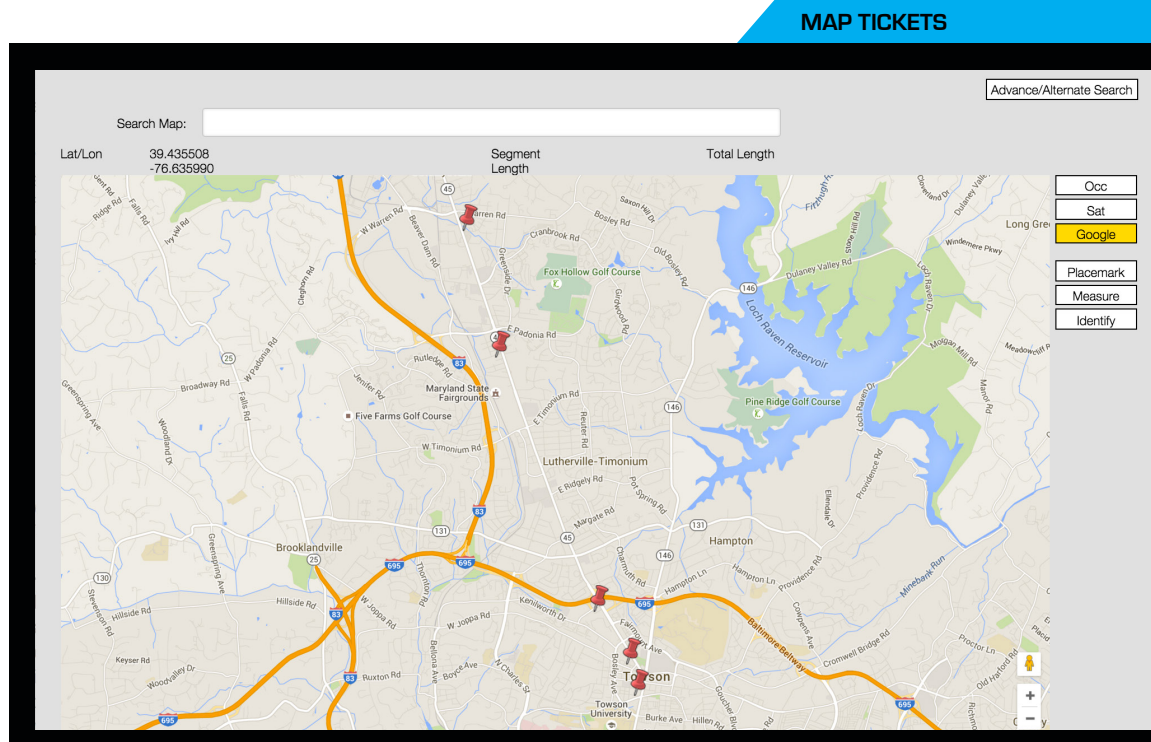
There will typically be one pin-mark per location. Clicking on an **INDIVIDUAL PIN-MARK** will display the ticket number, the name of the street the work is taking place on, and the ticket type. Clicking the ticket number in the pop-up display will allow you to view the individual ticket.
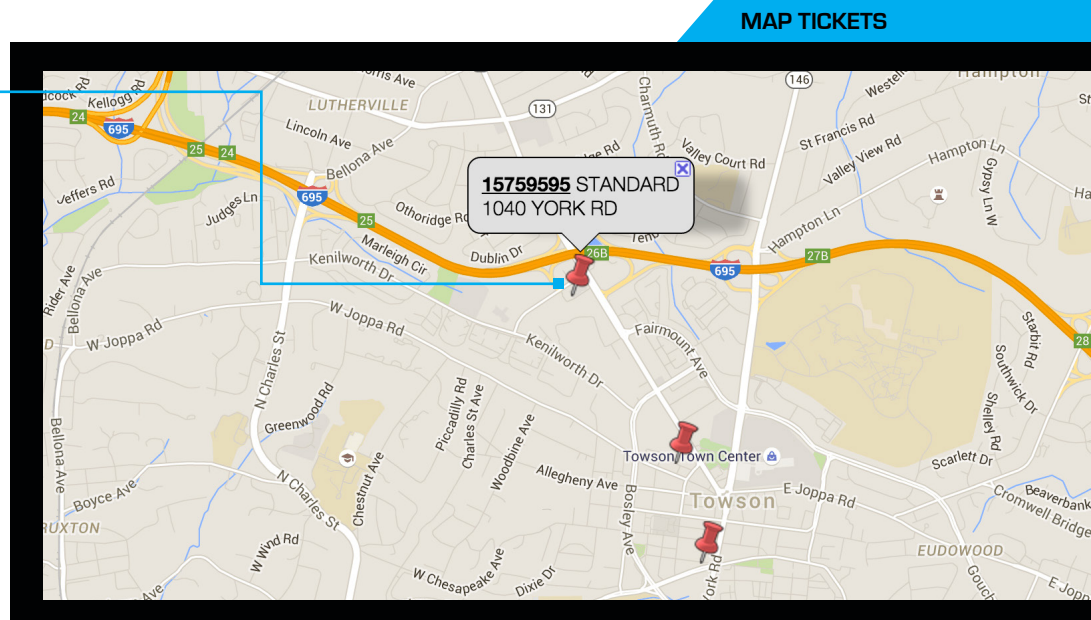
ADMIN MENU

The Administration Menu provides access to several administration functions.

iSite Users (Button)
Allows an administrator to create, manage, and delete additional iSite Login IDs for other users.

Edit Locator (Button)
Gives the administrator and managers the ability to create, delete, and administer as many locators as necessary.

Auto Assignments (Button)
Gives administrators the ability to automatically assign locate tickets to locators based on the physical location of the work area.
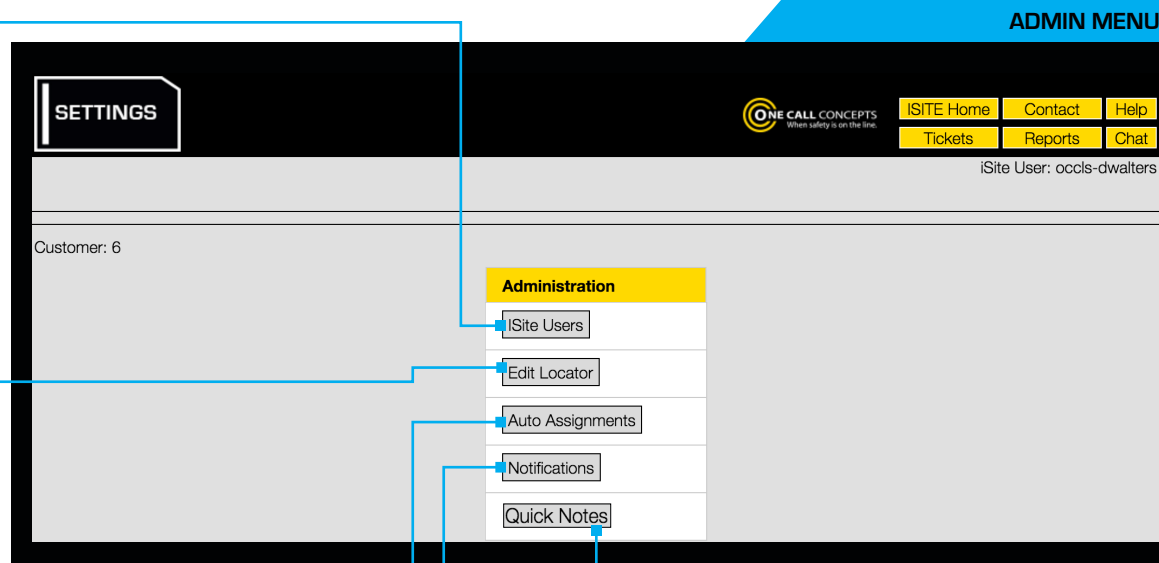
Notifications (Button)
Allows administrators establish parameters for receiving automatic notifications via email or SMS message.

Quick Notes (Button)
Allows individual users to create Quick Note buttons, which in turn allow users to enter a note in the Notes section of a ticket with a single click.

SETTINGS

ONE CALL CONCEPTS
When safety is on the line.

ISITE Home | Contact | Help
Tickets | Reports | Chat

iSite User: occls-dwalters

Customer: 6

Administration
- ISite Users
- Edit Locator
- Auto Assignments
- Notifications
- Quick Notes

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*NOTE: The options available in the Admin menu will vary depending on your account's privileges. Many account types will have limited access to the Admin menu.

LOCATOR
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ADMINISTER ISITE USERS

The iSite Users menu allows an administrator to create, manage, and delete additional iSite Login IDs for other users.

Admin Home (Button)
Click this button to return you to the Admin Menu.

NEW (Button)
Click this button to create a new iSite user account.

Search (Button)
Use the search functions to search for an existing login, either by the User Name or the Email address tied to the account.

ISITE USERS

SETTINGS		ONE CALL CONCEPTS When safety is on the line.	ISITE Home	Contact	Help
			Tickets	Reports	Chat

Admin Home NEW

iSite User: occls-dwalters

Customer: 6

Search
iSite User Name:
iSite Email:

Search

Name	Email	States	Account	Districts	Print Footer	Quick Notes
briancasey@occinc.com	briancasey@occinc.com	MD MN MO	Edit	Edit	Edit	Edit
occls-ahaa	dena@occls.com	MD	Edit	Edit	Edit	Edit
occls-akea	jwedding@occls.com	MD	Edit	Edit	Edit	Edit
occls-amiller	jwedding@occls.com	No States Have Been Setup	Edit	Edit	Edit	Edit
occls-ascott	blamb@occls.com	No States Have Been Setup	Edit	Edit	Edit	Edit
occls-awest	blamb@occls.com	No States Have Been Setup	Edit	Edit	Edit	Edit
occls-bcahall	jimmy@occls.com	No States Have Been Setup	Edit	Edit	Edit	Edit

Edit Account (Button)
Allows an administrator to edit the account information for the specified account, including User Name, Password, and LTM privileges.

Edit Districts (Button)
Allows an administrator to edit the specific Districts available to the specified account.

Edit Print Footer (Button)
Allows an administrator to automatically add a print footer to all tickets received by an iSite user, similar to a signature.

iSite User List
Contains a complete list of the iSite accounts tied to your Admin account.
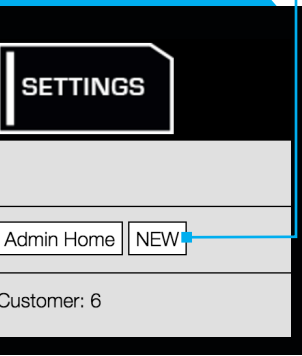
Edit Quick Notes (Button)
Allows individual users to create Quick Note buttons, which in turn allow users to enter a note in the Notes section of a ticket with a single click.

CREATING A NEW USER

To create a new user Login ID, click the **NEW** button.

This will bring you to the Create iSite User page. Fill out fields as necessary.

SETTINGS

Admin Home | NEW

Customer: 6

SETTINGS

ONE CALL CONCEPTS
When safety is on the line.

ISITE Home | Contact | Help
Tickets | Reports | Chat

iSite User: occls-dwalters

Admin Home | ISite Users

Customer: 6
ISite User: BCassidy
Password: ••••••••
Email: brennancassidy@occls.c
Default State: Maryland
Default Ticket Set: All
Default District: MD - CBW04 - BALTIMORE CITY DPW-OCCLS
Role: This is a Locator and Ticket Check user - roles 2 and 7
Last Login:
Is Active: Active

State
DE ☐
HI ☐
IA ☐
KS ☐
LA ☐
MD ☑
MN ☐
MO ☐
MT ☐
ND ☐
NE ☐
NJ ☐
NY ☐
OR ☐
TX ☐
WA ☐
All Other States * ☐

Save

* Note - All Other States Include: AL, AK, AZ, AR, CA, CO, CT, FL, GA, ID, IL, IN, KY, ME, MA, MI, MS, NV, NH, NM, NC, OH, OK, PA, RI, SC, SD, TN, UT, VT, VA, WV, WI, WY

Default State
Will determine what state the User will see tickets for when initially viewing the Ticket Management screen.

Default Ticket Set
Will determine what set of tickets the User will see when initially viewing the Ticket Management screen.

Default District
Will determine what Utility District's tickets the User will see when initially viewing the Ticket Management screen.

Role
Will determine what features of LTM are available to the new user, and what actions they may take while using LTM. The list of available user roles will depend on customer access. The drop-down menu contains a brief explanation of each role.

State
Will determine what state(s) the user has access to.

Active
Will determine whether the user is active or not. Inactive users have restricted access, and any automatic actions associated with this user (notifications, auto-assignments, etc.) will be suspended until the user is set to "Active" status again.

LOCATOR TICKET MANAGEMENT

ONE CALL CONCEPTS
When safety is on the line.

CREATING A NEW USER - CONTINUED

When you have completed entering all necessary information click **SAVE**. You will be returned to the iSite User list page, where the new user login will appear. You will also need to provide the new user with access to specific utility districts.

Click **EDIT** under the Districts column. This will bring you to the Edit Districts page.

Use the drop-down menu to select the utility district you'd like to provide access to, then press the **ADD DISTRICT** button.

EDIT DISTRICTS PAGE

The **START DATE** and **END DATE*** will determine the date range the User has access to tickets associated with that district. For example, if the User is granted access with a start date of 08/01/2015 and an end date of 12/31/2015, They will be able to access tickets that were created between the dates of August 1st, 2015 and December 31st, 2015.

*NOTE: Setting an End Date is optional. If you'd like to leave access open-ended simply leave the contents of the End Date field blank before clicking the ADD DISTRICT button.

The newly added utility district will appear below the drop-down menu. Repeat this process as needed.

You can revoke access to any utility district by clicking the corresponding **REMOVE** button in the Edit Districts page.

EDIT DISTRICTS PAGE

LOCATOR
TICKET MANAGEMENT

ONE CALL CONCEPTS
When safety is on the line.

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EDIT LOCATOR

Edit Locators gives the administrator and managers the ability to create, delete, and administer as many locators as necessary. Edit Locators may be accessed through the Administration Menu.

In order to create a Locator click the **ADD LOCATOR** button at the top of the Find Locator / Edit Locator screen.

SETTINGS

ISITE Home   Contact   Help
Admin   Chat

Find Locator

Admin Home   Add Locator

Date: Tue Nov 24 10:51:50 CST 2015

Code:
Name:
Find Locator

Code	Name	Edit	Assigned to	Districts
10	John Leitch	Edit	occls-jleitch	Districts
11	Chris Terrell	Edit		Districts
12	Rich Peregoy	Edit	occls-thastings	Districts

Enter the Locator's name in the Name field.

Next, choose a code for the Locator and enter it in the Code field. The Locator's code will determine their placement on the Find Locator / Edit Locator menu.

SETTINGS

ISITE Home   Contact   Help
Tickets   Reports   Chat
iSite User: occls-dwalters

Edit Locator

Save Changes
Find Locator

Date: Tue Nov 24 10:53:08 CST 2015

Name: Brennan Cassidy
Code: 1
Assigned to ✓
Active: BCassidy
             briancasey@occinc.com
             occls-ahaa
             occls-akea
             occls-amiller

Use the Assigned drop-down menu to select which Login ID should be associated with this Locator. (You will need to set up an active Login ID for the locator in order for it to appear in this drop-down menu.)

LOCATOR
TICKET MANAGEMENT

EDIT LOCATOR - CONTINUED

SETTINGS

ISITE Home | Contact | Help
Admin | Chat

Find Locator

Admin Home | Add Locator

Date: Tue Nov 24 10:56:39 CST 2015

Code:
Name:
Find Locator

Code	Name	Edit	Assigned to	Districts
1	Brennan Cassidy	Edit	BCassidy	Districts
10	John Leitch	Edit	occls-jleitch	Districts

When finished click **SAVE CHANGES**. This will return you to the Find Locator / Edit Locator menu. The newly created Locator will appear in the list.

Next, click the new locator's **DISTRICTS** button. This will take you to the Edit Locator Districts menu.

SETTINGS

ISITE Home | Contact | Help
Tickets | Reports | Chat

iSite User: occls-dwalters

Edit Locator Districts

Admin Home | Find Locator

Date: Tue Nov 24 11:01:20 CST 2015

Name: Brennan Cassidy
Code: 1
_____

State	Dist Code	Granted?	Action
md	BTV01	N	Add
md	CAL01	N	Add
md	CAP01	N	Add
md	CBW02	N	Add
md	CBW03	N	Add
md	CBW04	Y	Remove

Find the district you would like to grant access to and click the corresponding **ADD** button. Continue this process until you have granted the locator access to all necessary districts. All activated districts will show a **"Y"** in the **"GRANTED?"** column.

To edit an existing Locator, return to the Find Locator / Edit Locator menu and click the Edit button for the corresponding locator.

LOCATOR
TICKET MANAGEMENT

ONE CALL CONCEPTS
When safety is on the line.

ADMINISTER QUICK NOTES

The Administer Quick Notes feature allows individual users to create Quick Note buttons, which in turn allow users to enter a note in the Notes section of a ticket with a single click. Administer Quick Notes may be accessed through the Administration Menu.

To create a Quick Note choose an empty Quick Note slot and fill out the appropriate fields.

Sequence
The Sequence field will determine what order the Quick Notes button(s) appear on the Ticket interface.

Button Name
The Button Name field will determine the name of the button as it appears on the ticket interface.

SETTINGS		ISITE Home	Contact	Help
	ONE CALL CONCEPTS When safety is on the line.	Tickets	Reports	Chat

iSite User: occls-jstreet

Admin Home

Customer: 6

Quick Button #	Sequence	Button Name	Button Notes
1	1	Start	Start Locate
2	2	Finish	Finish Locate
3	3	snow	snow on ground
4	4	rain	rain on ground
5			

Save

Button Notes
The Button Notes field will determine what information is added in the Notes section of the ticket when the Quick Note button is clicked.

When you have filled out all necessary fields click the **SAVE** button.

Notes

Start	Finish	snow	rain

snow on ground

When viewing the ticket you may now simply click the **QUICK NOTE** button to add the entire note in the Notes field.

LOCATOR
TICKET MANAGEMENT

ONE CALL CONCEPTS
When safety is on the line.

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ADMINISTER AUTO-ASSIGNMENTS

Administer Auto-Assignments gives administrators the ability to automatically assign locate tickets to locators, based on the physical location of the work area. Administer Auto-Assignments may be accessed through the Administration Menu.

To create a new Auto-Assignment, click the **ADD AUTO-ASSIGNMENT** button.

This will bring you to the Edit Auto-Assignment page, which will contain a map interface.

SETTINGS

ONE CALL CONCEPTS
When safety is on the line.

ISITE Home   Contact   Help
                Admin   Chat

Find Auto Assignment

Admin Home | Add Auto Assignment | Show All on Map

Date: Tue Nov 24 11:04:18 CST 2015

Name:

Edit Auto Assignment

Save Changes
Find Auto Assignment

Date: Tue Nov 24 12:36:37 CST 2015

Name:
Locator:
Active: ○ Yes ● No
Interactive Map

Advance/Alternate Search

Search Map:

Call Center
Sat
Google

Placemark
Measure
Identify

Create Polygon

LOCATOR
TICKET MANAGEMENT

ONE CALL CONCEPTS
When safety is on the line.

Choose a name for the new Auto-Assignment polygon and enter it in the Name field.

Use the drop-down menu to assign a Locator to this area.

Click the **YES** button in the Active field. This will set the new polygon you are creating to Active status.

Use the map Search and Zoom functions to find the desired location.

Once you have found the correct location you will need to draw a polygon to designate the auto-assignment area.

To begin click the **CREATE POLYGON** button.

Edit Auto Assignment

Save Changes
Find Auto Assignment

Date: Tue Nov 24 12:36:37 CST 2015

Name: Arnold-Skidmore
Locator: Brennan Cassidy
Active: ● Yes ○ No
Interactive Map

Advance/Alternate Search

Search Map: Skidmore, MD 21409, USA

Call Center
Sat
Google

Placemark
Measure
Identify

Create Polygon

Lat/Lon 38.989569 -76.390343   Segment Length   Total Length

With the Create Polygon button active, start drawing your polygon by making a single click where you would like to begin. Click and release each time you would like to set another point of the polygon.

Continue until the entire area is covered. Once you have achieved the desired shape, close out the polygon by clicking on the same point where you began.

ONE CALL CONCEPTS
When safety is on the line.

Edit Auto Assignment

Save Changes
Find Auto Assignment

Name: Arnold-Skidmore
Locator: Brennan Cassidy
Active: ● Yes ○ No

Interactive Map

When you have finished, click the **SAVE** button. This will return you to the Find Auto-Assignment menu. The new polygon will appear in the Auto-Assignment list.

SETTINGS

ONE CALL CONCEPTS
When safety is on the line.

ISITE Home | Contact | Help
Admin | Chat

Find Auto Assignment

Admin Home | Add Auto Assignment | Show All on Map

Date: Tue Nov 24 14:20:51 CST 2015

Name:
Locator:

Find Auto Assignment

Name	Locator	Edit	Districts
Arnold-Skidmore	Brennan Cassidy	Edit	Districts
PG02	Robert Catterton	Edit	Districts
POLY_10	John Leitch	Edit	Districts
POLY_15	Frank Weese	Edit	Districts
POLY_26	Tom Keller	Edit	Districts

Once you have created the auto-assignment polygon you will need to assign districts to it. Click the **DISTRICTS** button for the newly created polygon.

This will take you to the Edit Auto Assignment Districts menu.

LOCATOR
TICKET MANAGEMENT

ONE CALL CONCEPTS
When safety is on the line.

AUTO-ASSIGNMENT

SETTINGS

ONE CALL CONCEPTS
When safety is on the line.

ISITE Home | Contact | Help
Tickets | Reports | Chat

iSite User: occls-dwalters

Edit Auto Assignment Districts

Find Auto Assignment

Date: Tue Nov 24 14:24:43 CST 2015

Name: Arnold-Skidmore
Locator: Brennan Cassidy

State	Dist Code	Granted?	Action
md	BTV01	N	Add
md	CAL01	N	Add
md	CAP01	N	Add
md	CBW02	N	Add
md	CBW03	N	Add
md	CBW04	Y	Remove
md	CBW05	N	Add
md	JICT02	N	Add

Activate all necessary districts by clicking the corresponding Add button(s). All activated districts will show a "Y" in the "Granted?" column.

That's it! New tickets matching the pre-specified geographic area and utility district(s) will now be automatically assigned to the corresponding locator as soon as they are received.

LOCATOR
TICKET MANAGEMENT

ONE CALL CONCEPTS
When safety is on the line.

ADMINISTER/FIND NOTIFICATIONS

The **ADMINISTER TICKET NOTIFICATIONS** is an optional system that will automatically notify users when certain types of tickets are received by LTM, via SMS (text message), or email. **ADMINISTER TICKET NOTIFICATIONS** may be accessed through the **ADMINISTRATION MENU.**

To create a Ticket Notification click the **ADD NOTIFICATION** button for the corresponding state. This will take you to the **EDIT NOTIFICATION** menu.

SETTINGS

ONE CALL CONCEPTS
When safety is on the line.

| ISITE Home | Contact | Help |
| Tickets | Reports | Chat |

Find Notification

Admin Home

Customer: 6   Date: Wed Nov 25 08:30:04 CST 2015

Notifications for MD:
Add MD Notification
Notifications found for MD:

State	Enabled	District	Phone	Email	Start	End	S	M	T	W	T	F	S	
MD	Yes	CBW02	1112223333	test@occinc.com			Y	Y	Y	N	N	N	N	Edit

Notifications for Other States:
Add Other States Notification
Notifications found for Other States:

State	Enabled	District	Phone	Email	Start	End	S	M	T	W	T	F	S	
NC	Yes	CHA01		dispatch@occls.com			Y	Y	Y	Y	Y	Y	Y	Edit
NC	Yes	CHA02	2404729401		07:00:00	15:30:00	N	Y	Y	Y	Y	Y	N	Edit
NC	Yes	CHA02		dispatch@occls.com			Y	Y	Y	Y	Y	Y	Y	Edit
NC	Yes	CHA03		dispatch@occls.com			Y	Y	Y	Y	Y	Y	Y	Edit

LOCATOR
TICKET MANAGEMENT

ONE CALL CONCEPTS
When safety is on the line.

District
Use the drop-down menu to select the relevant district code.

Email
Enter the email address you want to receive the notifications. (If you do not want to receive email notifications leave this field blank.)*

SMS Provider
Use the drop-down menu to select your mobile service provider. (If you do not want to receive SMS notifications do not select an SMS provider.)*

ADMINISTER NOTIFICATIONS

SETTINGS

ONE CALL CONCEPTS
When safety is on the line.

ISITE Home | Contact | Help
Admin | Chat

Edit Notification

Save Changes
Find Notification

Date: Tue Nov 24 14:42:00 CST 2015

District: CBW04
Email:
SMS Provider: (153) Verizon PCS
SMS Phone: 5555555555   (e.g. 3244532560)
Start Time: 00:00:00   (HH:mm:ss), e.g. 16:45:00 represents 4:45pm
End Time: 23:59:59   (HH:mm:ss), e.g. 16:45:00 represents 4:45pm
Day(s) of Week: ☑ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☑ Saturday
Enabled: Yes
Headers:
☐ DESIGNER
☑ EMERGENCY
☐ FIOS
☐ FTTP
☐ INSUFFICIENT NOTICE
☐ OMBN
☐ SHORT NOTICE
☐ STANDARD

SMS Phone
Enter the cell phone number you want to receive notifications. (If you do not want to receive SMS notifications leave this field blank.)*

Day(s) of Week:
Use the check boxes to specify what day(s) of the week you would like to receive notifications.†

Enabled
Use the drop-down menu to enable or disable the notification.

Start Time and End Time
Enter the timeframe you would like to receive notifications. Make sure to enter the information in the format shown.†

Headers
Use the check boxes to specify the type of ticket(s) that will result in a notification.

When you are ready click the **SAVE CHANGES** button.

In this example the user will receive a text message when an Emergency ticket is received anytime during a Saturday or Sunday.

* NOTE: You must choose between receiving notifications via email or text message. If you enter information for both, LTM will only send notifications to your email address.

† NOTE: The timeframe for each notification cannot cross the midnight (24:00:00) mark. For example, if you wanted to receive a notification anytime an emergency is submitted between the hours of 5pm and 7am Mon-Fri you will need to set up two notifications, one for 5pm-11:59pm Mon-Fri and another for 12am-7am Mon-Fri.

LOCATOR TICKET MANAGEMENT

ONE CALL CONCEPTS
When safety is on the line.

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REPORTS MENU

The Reports section provides options for running reports on several different aspects of LTM. The types of available Reports will vary depending on your level of customer access. Reports may be accessed via the iSite Menu bar at the upper-right corner of the LTM page.

Click the link for the type of report you would like to run.

Report Name	Description
Billed Tickets	Lists billed tickets based on the information entered in the search input. This report includes the ticket number, district code, ticket billed date and time, login ID, billing code, and additional unit.
Closed Tickets	This report provides a list of closed ticket based on the information entered in the search input. This report includes the ticket number, district code, ticket closed date and time, and login ID.
District Detail	Provides details by district code per day for the provided date range. This includes a summary of tickets received and statuses made.
District Summary	Provides the Summary by District Code for the Tickets Received and Statuses provided. This report is for Ticket Check centers.
Excavator Address	This report provides a list of company and the excavator address ticket summary based on the information entered in the search input.
Locate Details	Allows reporting on the customizable locate details fields.
---Daily Audit	---this can be run with ticket audit by choosing one day---This allows the user to view an audit report for the tickets received daily for a district code.
Ticket Audit	This report provides a list of transmissions received for a district code for the requested date range.
Ticket Check Compliance	This report provides on time, late and not responded tickets for a given timeframe, ticket header(s) and district code(s)
Ticket Location	The Ticket Location report provides the list of the tickets, call date/time, address, city/place, latitude and longitude information for a selected district code and date range.
Ticket Marked	This report will give a complete list of the tickets, header, and the provided statuses with their date and method.
--User Activity	The report provides data based on the user(s) activity whereby it shows how many tickets an user closed and the status details for the given timeframe, district code(s) and user(s). Optionally, selecting a locator displays the data where the user(s) posted information on tickets that were assigned to the given locator(s).
Work Done For	This report provides a list of ticket fields based on the information entered in the search input. This report includes the ticket number, update of ticket number, ticket header, original call date and time, work to begin date and time, county, address, street, type of work, work being done for, company, member notified, district code, status, and status date and time.
--Invoices and Related Reports	After an Invoice is created and saved, users may access the Invoice(s) created as well as the Invoice Details Report and Ticket Billing Summary Report for the given invoice(s).

REPORTS

ONE CALL CONCEPTS
When safety is on the line.

iSITE Home   Contact   Help
Tickets   Reports   Chat

Custom Locate Details Summary Report

Date: Tue Nov 24 13:03:44 CST 2015

Begin Date: 11/01/2015
End Date: 11/18/2015
District Code: MD - CBW04 (BALTIMORE CITY DPW-OCCLS)

Run Report

When prompted, fill in the appropriate fields to specify the parameters of the report, and click **RUN REPORT.**

LOCATOR
TICKET MANAGEMENT

ONE CALL CONCEPTS
When safety is on the line.