



LOCATOR
TICKET MANAGEMENT

BASIC

TABLE OF CONTENTS

Introduction, Logging In pg. 2-3

Ticket Management Page pg. 4-8

Viewing a Ticket pg. 9-11

Map Tickets pg. 12

Administration Menu pg. 13

Administer iSite Users pg. 14

Creating a New User pg. 15-16

Edit Locator..... pg. 17-18

Administer Quick Notes pg. 19

Administer Auto-Assignments pg. 20-24

Administer/Find Notifications pg. 25-26

Reports Menu pg. 27

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

FORGET YOUR PASSWORD?

NEED TO REGISTER?

Search and Status

 **ONE CALL CONCEPTS**
When safety is on the line.

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.

ITIC

LOCATOR
TICKET MANAGEMENT

Messages

Logout

ISITE MAIN MENU

DO YOU HAVE ANY OF THESE ON YOUR PROPERTY?

Propane

Out Building

Invisible Fence

Sprinkler System

MD

CALLER INFORMATION

PHONE NO

EXCAVATION COMPANY

CITY

ADDRESS

STATE

EMAIL ADDRESS

ONSITE NAME

VOICE MAIL

CELL NUMBER

STREET

ZIP

FAX

ONSITE PHONE

LOCATOR
TICKET MANAGEMENT

ONE CALL CONCEPTS
When safety is on the line.

03

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.

Contact (Button)

Will display a page with contact information for the call center.

Admin (Button)

Clicking this button will bring you to the Locator Ticket Management Administration Menu.

Help (Button)

Will display a page with links to training materials.

TICKET MANAGEMENT PAGE

The screenshot shows the 'Locator Ticket Management' interface. At the top left is the 'LOCATOR TICKET MANAGEMENT' logo. To its right is the 'Ticket Management Menu' section with the text: 'These fields allow you to narrow down the list of tickets received by your company.' Below this are search filters: 'Ticket Set:' (Open Tickets), 'District Code:' (MD - CBW04 (BALTIMORE CITY DPW-OCCLS)), 'Refine Search:' (Street: hillen), and 'Date Range between:' (09/01/2015 and 09/01/2015). A 'Show Tickets' button is at the bottom right of the filters. On the left side, there are buttons for 'Map Tickets' and 'Print Tickets', and a 'Change Current Display' link. At the top right, there is a navigation bar with buttons for 'ISite Home', 'Contact', 'Help', 'Admin', 'Reports', and 'Chat'. A red notification banner at the top right says 'You have 1 unviewed emergency ticket'. Below the filters is a table of ticket status icons: Emergency (red triangle), Viewed Emergency (eye), Priority (yellow star), Meeting (green checkmark), Past Due (clock), Locked (lock), and Multiple Auto-Assignments (multiple arrows).

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.

Print Tickets (Button)

Clicking this button will show all currently displayed tickets in a print-ready format.

Reports (Button)

Clicking this button will bring you to the Reports menu.

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.

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.

TICKET MANAGEMENT PAGE



- ISITE Home
- Contact
- Help
- Admin
- Reports
- Chat

Map Tickets

Print Tickets

Change Current Display

Ticket Set:

All Tickets in Production

District Code:

All Districts

Refine Search:

Select Field

 = +

Date Range between:

09/10/2015

 and

09/17/2015

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.

TICKET MANAGEMENT PAGE



Map Tickets

Print Tickets

Change Current Display

Ticket Set:

All Tickets in Production

District Code:

All Districts

Refine Search:

Select Field

 = +

Date Range between:

09/10/2015

 and

09/17/2015

Show Tickets

- ✓ 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

- Emergency
- Viewed Emergency
- Priority
- Meeting
- Past Due
- Locked
- Multiple Auto-Assignments



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.

TICKET MANAGEMENT PAGE

LOCATOR
TICKET MANAGEMENT

ONE CALL CONCEPTS
When safety is on the line.

ISITE Home
Admin

Contact
Reports

Help
Chat

Map Tickets
Print Tickets

Change Current Display

Ticket Set:
District Code:
Refine Search:
Date Range between:

All Tickets in Production
All Districts
Select Field
09/11/2015 and 09/18/2015

Show Tickets

All Districts

MD - CBW02 (BALTIMORE CITY DPW-OCCLS)

MD - CBW04 (BALTIMORE CITY DPW-OCCLS)

MD - CBW05 (BALTIMORE CITY DPW-OCCLS)

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.

TICKET MANAGEMENT PAGE

LOCATOR
TICKET MANAGEMENT

ONE CALL CONCEPTS
When safety is on the line.

Help
Chat

Map Tickets
Print Tickets

Change Current Display

Ticket Set:
District Code:
Refine Search:
Date Range between:

All Tickets in Production
MD - CBW04 (BALTIMORE CITY DPW-OCCLS)
Select Field
09/11/2015

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

Locked

Multiple
Auto-
Assignments

Click the  button to refine your search by additional criteria.

Click the  button to clear all Refine Search criteria.










[ISITE Home](#) [Contact](#) [Help](#)
[Admin](#) [Reports](#) [Chat](#)

[Map Tickets](#) [Print Tickets](#)

Change Current Display

Ticket Set: All Tickets in Production
District Code: MD - CBW04 (BALTIMORE CITY DPW-OCCLS)
Refine Search:
County: Baltimore
Street: Hillen
Date Range between: 09/10/2015 and 09/17/2015
[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.










[ISITE Home](#) [Contact](#) [Help](#)
[Admin](#) [Reports](#) [Chat](#)

[Map Tickets](#) [Print Tickets](#)

Change Current Display

Ticket Set: All Tickets in Production
District Code: MD - CBW04 (BALTIMORE CITY DPW-OCCLS)
Refine Search:
County: Baltimore
Street: Hillen
Date Range between: 09/01/2015 and 09/01/2015
[Show Tickets](#)

 Emergency  Viewed Emergency  Priority  Meeting  Past Due  Locked  Multiple Auto-Assignments

Show Tickets

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



[ISITE Home](#)
[Contact](#)
[Help](#)
[Admin](#)
[Reports](#)
[Chat](#)

You have 1 unviewed emergency ticket

[Map Tickets](#)
[Print Tickets](#)

Change Current Display

Ticket Set:
 District Code:
 Refine Search:
 Date Range between: and

☒ Emergency
 ☒ Viewed Emergency
 ☒ Priority
 ☒ Meeting
 ☒ Past Due
 ☒ Locked
 ☒ Multiple Auto-Assignments

8 ticket records found

Tickets for District MD - CBW04 (09/01/2015 to 09/04/2015)

Message # ↑ ↓	Original Call ↑ ↓	Work Begin ↑ ↓	Street ↑ ↓	City ↑ ↓	County ↑ ↓	State ↑ ↓	District ↑ ↓	Locator ↑ ↓	Sta
15566822	09/01/15 06:54:17	09/01/15 07:00:00	333 HILLEN RD	TOWSON	BALTIMORE	MD	CBW04	Steve Oneill	Not con pro
15570149	09/01/15 17:27:09	09/03/15 23:59:00	HILLEN RD	TOWSON	BALTIMORE	MD	CBW04	Steve Oneill	Ma
15570151	09/01/15 17:27:19	09/03/15 23:59:00	HILLEN RD	TOWSON	BALTIMORE	MD	CBW04	Steve Oneill	Ma
15570152	09/01/15 17:28:02	09/03/15 23:59:00	HILLEN RD	TOWSON	BALTIMORE	MD	CBW04	Steve Oneill	Ma
15570155	09/01/15 17:28:11	09/03/15 23:59:00	HILLEN RD	TOWSON	BALTIMORE	MD	CBW04	Steve Oneill	Ma
15570159	09/01/15 17:28:17	09/03/15 23:59:00	HILLEN RD	TOWSON	BALTIMORE	MD	CBW04	Steve Oneill	Ma
15570201	09/01/15 17:38:17	09/03/15 23:59:00	409 HILLEN RD	TOWSON	BALTIMORE	MD	CBW04	Steve Oneill	Ma
15576581	09/03/15 16:55:35	09/08/15 23:59:00	7701 HILLENDALE RD	HILLENDALE	BALTIMORE	MD	CBW04	Steve Oneill	Ma to p own

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.

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

ONE CALL CONCEPTS
When safety is on the line.

SITE HomeContactHelp
AdminReportsChat

You have 1 unviewed emergency ticket

Ticket List

Miss Utility

Ticket No: 15570201
Original Call Date: 09/01/15 05:38 pm
Work to Begin Date: 09/03/15 11:59 pm

STANDARD
Expiration Date: 09/21/15 23:59 pm

TICKET ACTIONS

RetransmitAdd Private Attachment

CALLER INFORMATION

Company Name: S J LOUIS CONSTRUCTION
Contact Name: NICK BORNEKE
Caller Address: P O BOX 459 ROCKVILLE,MD 56369
Email Address: nickb@sjlouis.com
Job Site Contact: NICK BORNEKE

Fax Phone: 320-253-3533
Phone: 320-253-9291
Phone: 320-428-3933

DIG SITE INFORMATION

Type of Work: INSTALL WATER LINE
Work Being Done For: BALTIMORE COUNTY
Explosives: N
Permit:
Job Number:

DIG SITE LOCATION

State: MD
Place: TOWSON
Address: 409
Street: HILLEN RD
Intersecting Street: FAR HILLS DR
Extent of Work: LOCATE/MARK: THE 400 BLOCK OF HILLEN RD. TO STEVENSON LN. MARKING OUT 200 FEET SOUTH OF THE NORTH. INSIDE THE PUMPING STATION. FROM THE WEST FENCE TO THE EAST FENCE.
Remarks:
Map Coord NW Lat: 39.4000000
SE Lat: 39.3933333

County: BALTIMORE
Subdivision:

Lon: -76.5933333
Lon: -76.5900000

MEMBERS NOTIFIED

District	Company Name	Phone Number
BCGOIT	BALT CO GOVT/KCI TECHNOLOGIES	Marked
BDI01	BLACK & DECKER, INC	Clear/No conflict
BGEBA	BGE ELECTRIC-USIC	Marked
BGEBAG	BGE GAS-USIC	Marked
Viewing CBW04	BALTIMORE CITY DPW-OCCLS	Marked
CTV01	COMCAST - UTILIQUEST	Clear/No conflict
HTV02	COMCAST- FIBER/UTILIQUEST	Clear/No conflict
VB7	VERIZON	Clear/No conflict

LOCATOR INFORMATION

Private Attachments
None

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.

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

Private Attachments
None

Public Attachments
None

Past Work Start? Y Ticket Locked? N Ticket Cancelled? N

Your view of this ticket is Open

Locator: 46 - Steve Onell

Status
Current Status: Marked
Update Status: --

Status Comments

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.:

Notes
Dog in Yard Flags Only

History

Date	Type	District	Display	Customer	Locator	User
09/03/15 15:28:59	Ticket Check Response Added	CBW04 BALTIMORE CITY DPW-OCCLS	Marked			occls-sonell
09/01/15 17:40:03	Locator Assigned	CBW04 BALTIMORE CITY DPW-OCCLS			Steve Onell	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.

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.

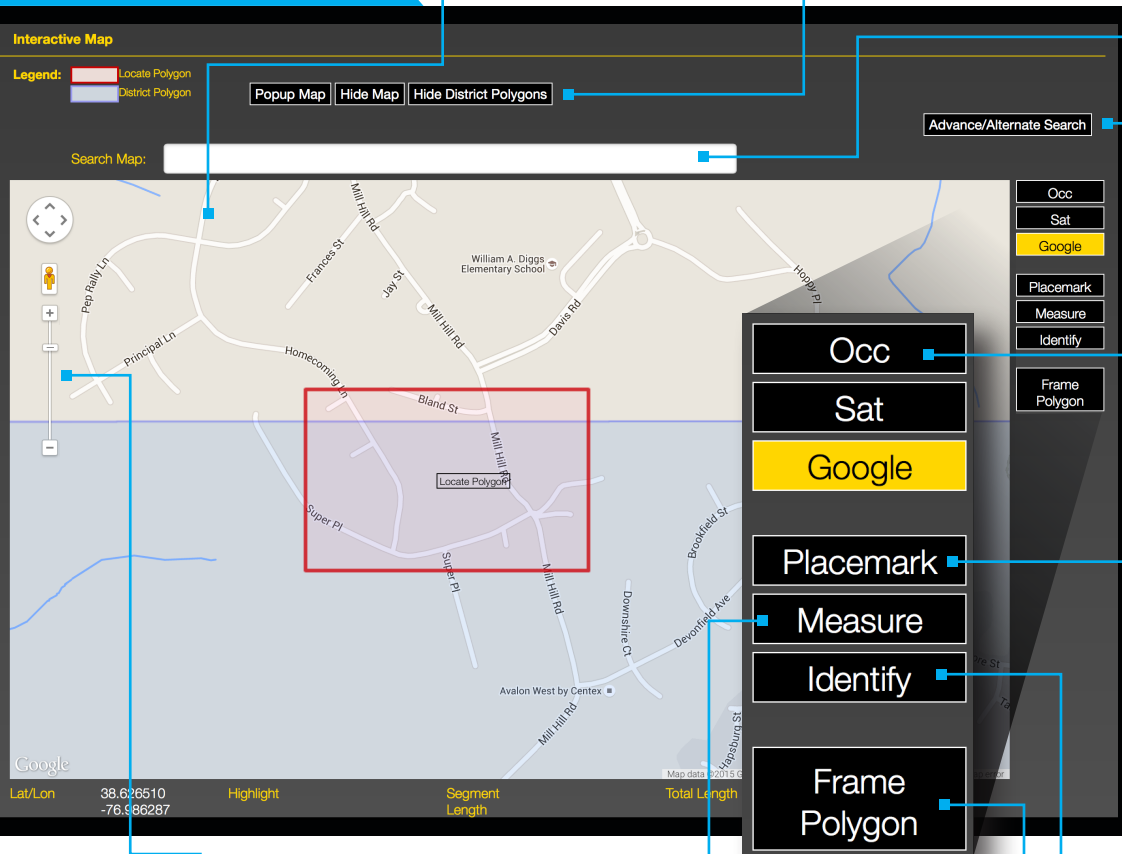
Hide/Show Map (Button)

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.

TICKET VIEW (CONTINUED)



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.

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.]

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.

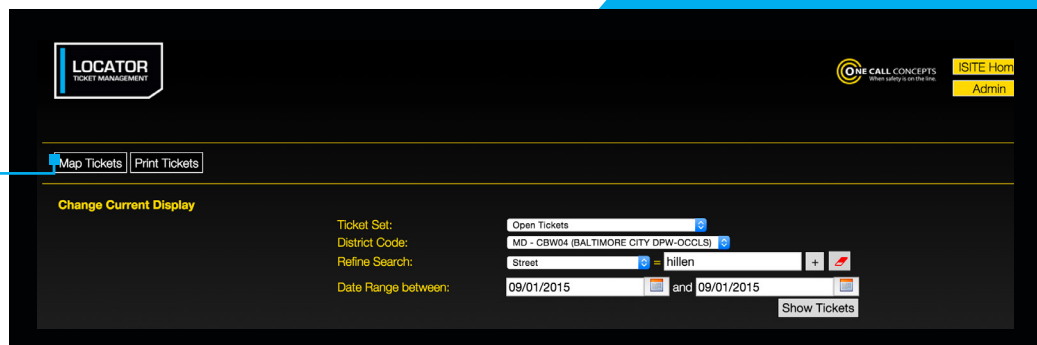
Frame Polygon (Button)

Click this button to center the map on the Locate Polygon.

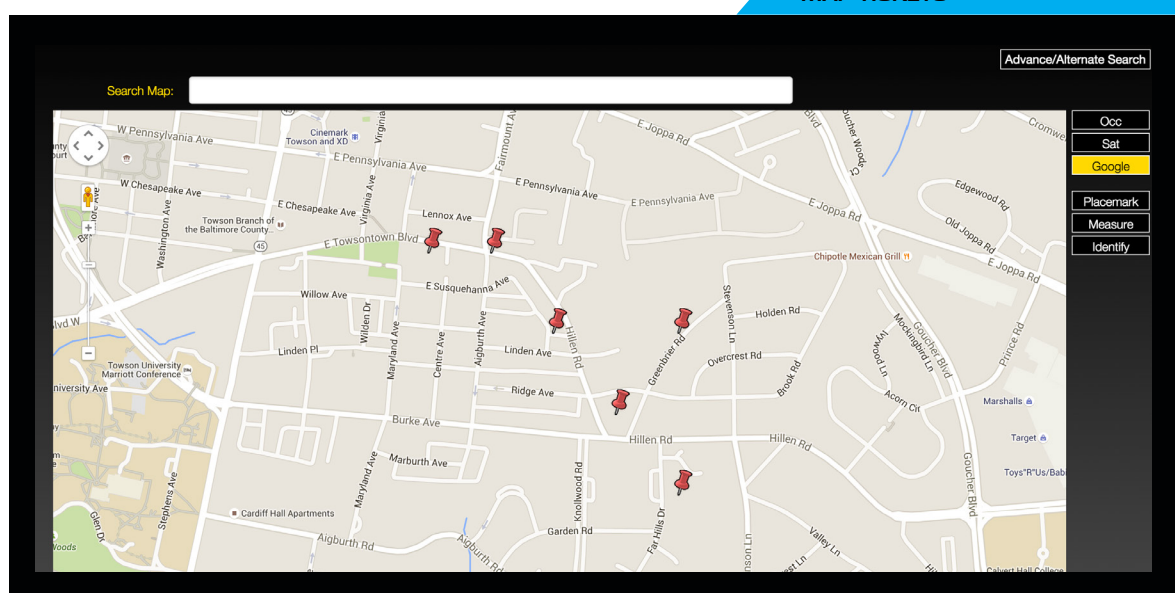
MAP TICKETS

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

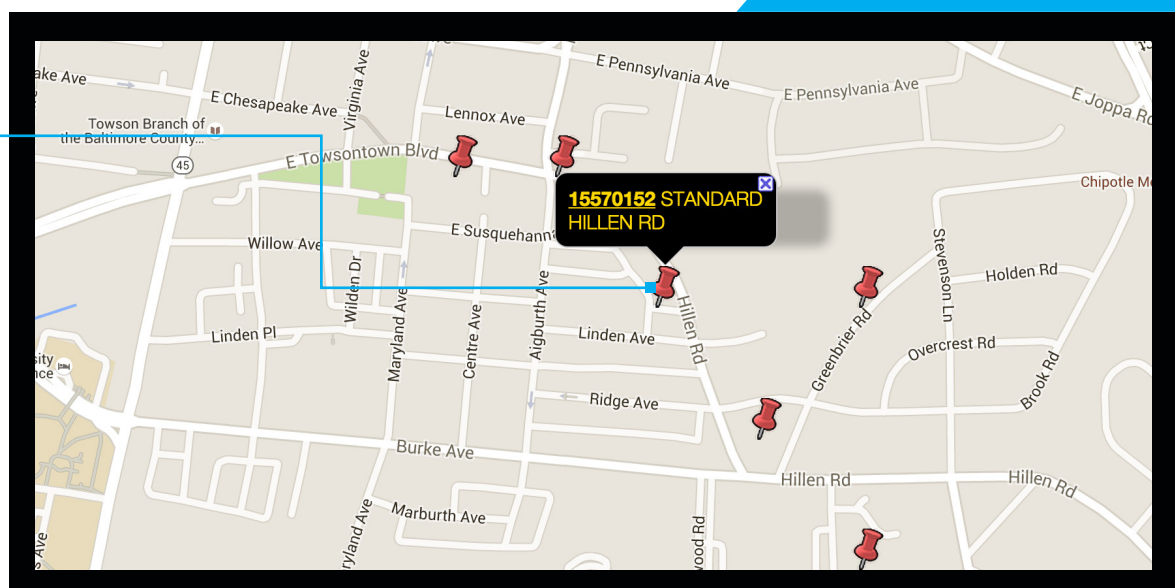
Once you have narrowed down your list of pending locate requests on the Ticket Management main page, click the **MAP TICKETS** button at the top of the screen.



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)

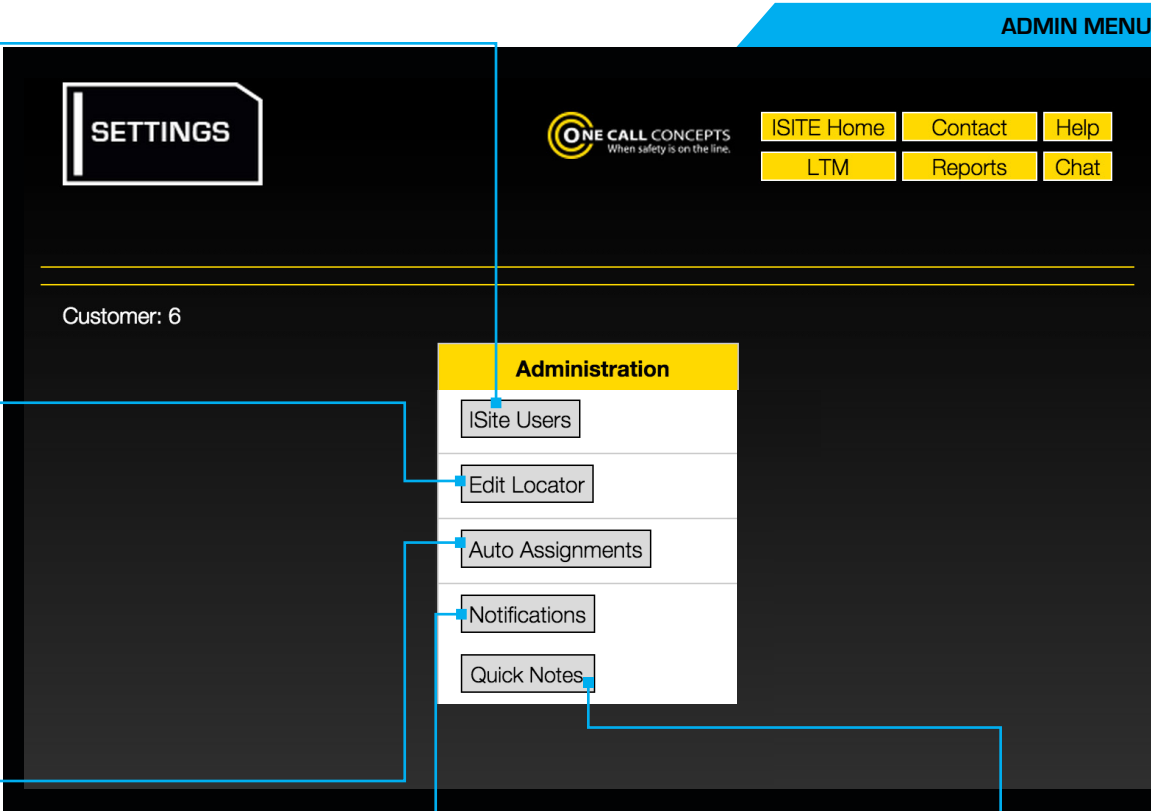
Gives administrators the ability to automatically assign locate tickets to locators based on the physical location of the work area.

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.



*** 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.

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



Caller ID: 238283 Web Class: webntrms Customer: 6

Search
iSite User Name:
iSite Email:

Edit Account (Button)

Allows an administrator to edit the account information for the specified account, including User Name, Password, and LTM privileges.

Name	Email	States	Account	Districts	Quick Notes	Print Footer
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
occls-bcty	dena@occls.com	MD	Edit	Edit	Edit	Edit

Edit Districts (Button)

Allows an administrator to edit the specific Districts available to the specified account.

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.

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.



CREATING A NEW USER

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

NEW USER

SETTINGS

Admin HomeNEW

Caller ID: 238283 Web Class:

This will bring you to the Create iSite User page.

Fill out fields as necessary.

CREATE ISITE USER PAGE

ISITE HomeContactHelp

LTMReportsChat

Admin HomeISite Users

Customer: 6

ISite User:

BCasey

Password:

.....

Email:

BrianCasey@occinc.com

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

State

DE

HI

IA

KS

LA

MD

MO

MT

ND

NE

NJ

NY

OR

TX

WA

All Other States *

Save

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.

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.

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

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.

CREATE ISITE USER PAGE

Name	Email	States	Account	Districts	Quick Notes	Print Footer
BCasey	briancasey@occinc.com	MD	Edit	Edit	Edit	Edit
occls-ahaa	dena@occls.com	MD	Edit	Edit	Edit	Edit

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

MD

08/01/2015 12/31/2015 Add District

- MD - BTW01 - COMCAST CABLE/UTILIQUEST
- MD - CAL01 - COMCAST/UTILIQUEST
- MD - CAP01 - CAPITAL ONE - OCCLS
- MD - CBW02 - BALTIMORE CITY DPW-OCCLS
- MD - CBW03 - BALTIMORE CITY FIBER-OCCLS
- MD - CBW04 - BALTIMORE CITY DPW-OCCLS**
- MD - CBW05 - BALTIMORE CITY DPW-OCCLS
- MD - JICT02 - COMCAST/ UTILIQUEST
- MD - JTV01 - COMCAST/UTILIQUEST
- MD - LT02 - SMECO/DAYTIME LOCATOR OCCLS
- MD - LT03 - SMECO
- MD - LT04 - SMECO/OCCLS DAYTIME LOCATOR
- MD - LT05 - SMECO/OCCLS DAYTIME LOCATOR
- MD - PEPCOPG - PEPCO - OCCLS
- MD - PF01 - SMECO/OCCLS

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 delete the contents of the End Date field 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

MD

08/01/2015 12/31/2015 Add District

District Id	District Name	Start Date	End Date	Remove
MD - CBW04	BALTIMORE CITY DPW-OCCLS	2015-08-01	2015-12-31	Remove

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.

Enter the Locator's name in the Name field.

SETTINGS

ONE CALL CONCEPTS
When safety is on the line.

ISITE HomeContactHelpAdminChat

Find Locator

Admin HomeAdd Locator

Caller ID: 238283 Web Class: webntmsDate: Tue Sep 01 10:56:34 CDT 2015

Code:
Name:
Find Locator

Code	Name	Edit	Assigned to	Districts
10	John Leitch	Edit	occls-jleitch	Districts
11	Chris Terrell	Edit		Districts

EDIT LOCATOR PAGE

SETTINGS

ONE CALL CONCEPTS
When safety is on the line.

ISITE HomeContactHelpLTMReportsChat

Edit Locator

Save ChangesFind Locator

Caller ID: 238283 Web Class: webntmsDate: Tue Sep 01 10:59:15 CDT 2015

Name: Brian Casey
Code: 1
Assigned to: BCasey
occls-ahaa
occls-akea
occls-amiller
occls-ascott

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.

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.)

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.

SETTINGS

ONE CALL CONCEPTS

When safety is on the line.

ISITE Home

Contact

Help

Admin

Chat

Find Locator

Admin Home

Add Locator

Caller ID: 238283

Web Class: webntms

Date: Tue Sep 01 11:01:44 CDT 2015

Code:

Name:

Find Locator

Code	Name	Edit	Assigned to	Districts
1	Brian Casey	Edit	BCasey	Districts
10	John Leitch	Edit	occls-jleitch	Districts

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

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.

SETTINGS

ONE CALL CONCEPTS

When safety is on the line.

ISITE Home

Contact

Help

LTM

Reports

Chat

Edit Locator Districts

Find Locator

Date: Tue Sep 29 15:19:23 CDT 2015

Name: Brian Casey

Code: 1

State	Dist Code	Granted?	Action
md	BTVO1	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

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.

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.

NEW QUICK NOTE SETUP

SETTINGS

ONE CALL CONCEPTS

When safety is on the line.

ISITE Home

Contact

Help

LTM

Reports

Chat

Admin Home

ISite Users

Customer: 6

Quick Button #	Sequence	Button Name	Button Notes
1	1	Dog in Yard	Dog in Yard - Make contact
2	2	Flags Only	Mark with flags only, do not
3			
4			
5			

Save

NEW QUICK NOTE SETUP

Notes

Dog in Yard

Flags Only

Dog in Yard - Make contact prior to arrival

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

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 HomeContactHelpAdminChat

Find Auto Assignment

Add Auto Assignment

Name:Locator:

Find Auto Assignment

Date: Wed Sep 09 13:37:58 CDT 2015

Name	Locator	Edit	Districts
PG02	Robert Catterton	Edit	Districts
POLY_10	John Leitch	Edit	Districts
POLY_15	Frank Weese	Edit	Districts

SETTINGS

ONE CALL CONCEPTS
When safety is on the line.

ISITE HomeContactHelpLTMChat

Edit Auto Assignment

Save ChangesFind Auto Assignment

Name:Locator:

Active: YesNo

Interactive Map

Date: Tue Sep 08 15:15:51 CDT 2015

Advance/Alternate Search

Search Map:

Map of the United States with a locator icon and search controls.

OccSatGooglePlacemarkMeasureIdentifyCreate Polygon

LOCATOR
TICKET MANAGEMENT

ONE CALL CONCEPTS
When safety is on the line.

20

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.

SETTINGS

ONE CALL CONCEPTS
When safety is on the line.

ISITE HomeContactHelp

LTMChat

Edit Auto Assignment

Save ChangesFind Auto Assignment

Date: Fri Sep 11 11:09:35 CDT 2015

Name: Arnold-Skidmore

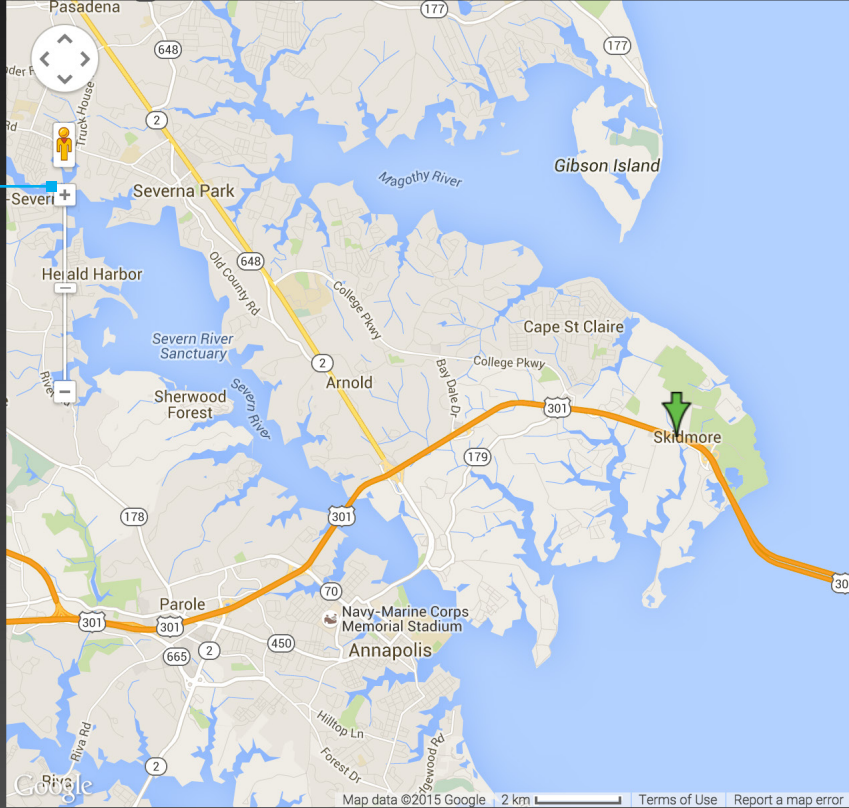
Locator: BCasey

Active: ☒ Yes ☐ No

Interactive Map

Advance/Alternate Search

Search Map: Skidmore, MD, United States



Occ

Sat

Google

Placemark

Measure

Identify

Create Polygon

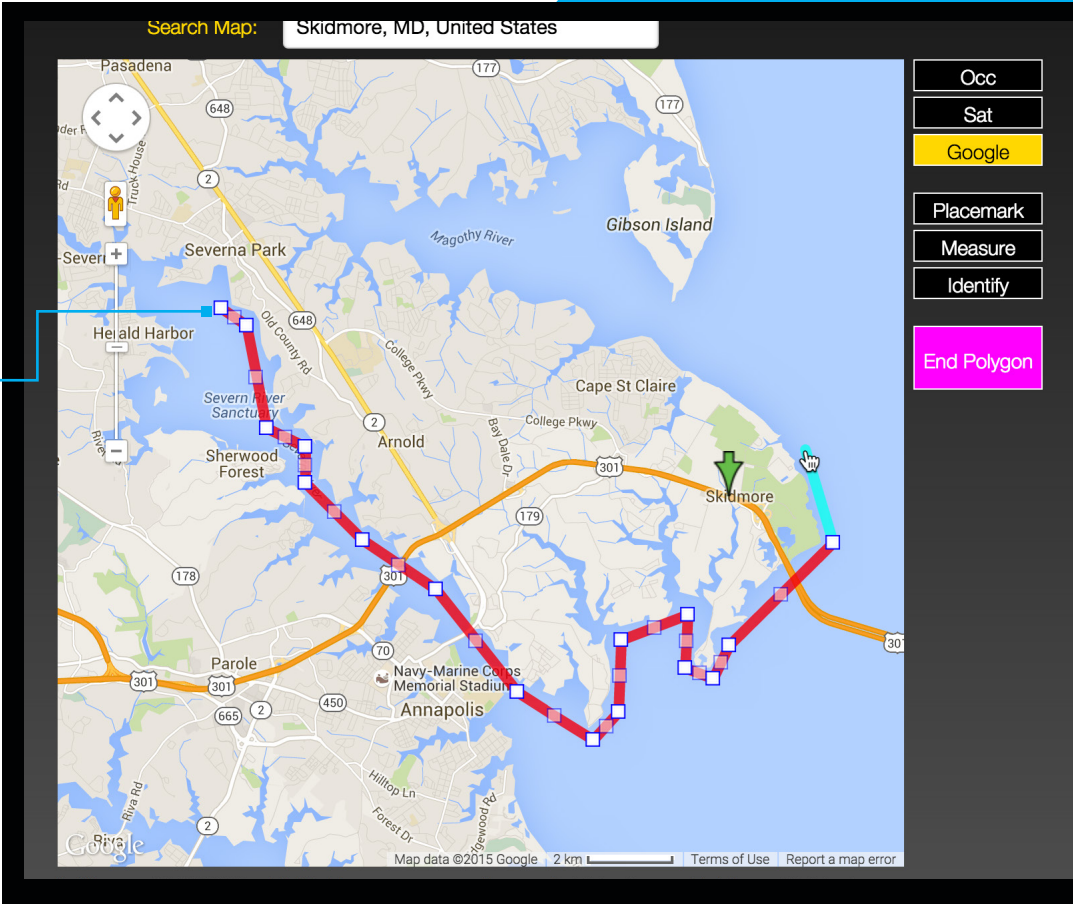
Lat/Lon39.052968-76.591187

Highlight

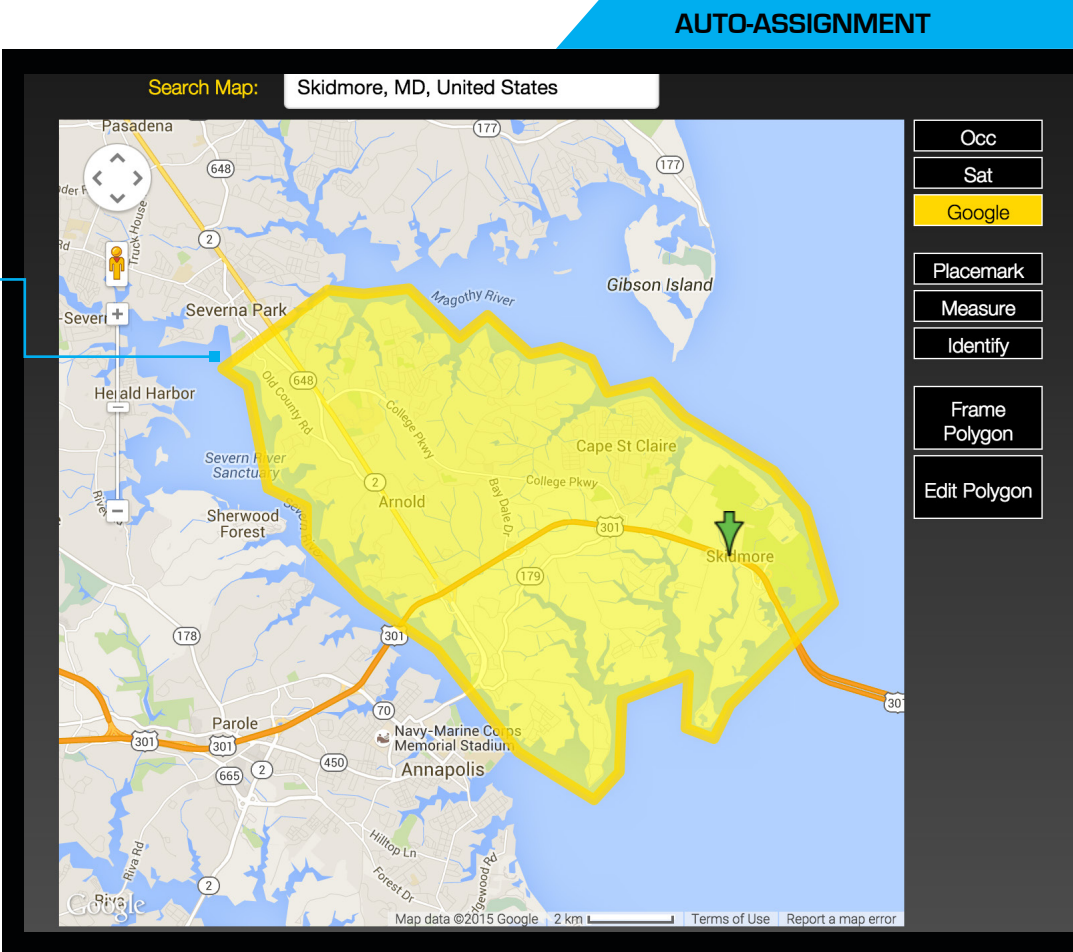
Segment Length

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.



AUTO-ASSIGNMENT

SETTINGS



Edit Auto Assignment

Save Changes

Find Auto Assignment

Date:

Name: Arnold-Skidmore

Locator: BCasey

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.

Find Auto Assignment

Add Auto Assignment

Name:

Locator:

Find Auto Assignment

Name	Locator	Edit	Districts
Arnold-Skidmore	Brian Casey	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
POLY_31	Rodney Brown	Edit	Districts
POLY_32	Ernest Thompson	Edit	Districts
POLY_35	William Fitts	Edit	Districts
POLY_40	Jermaine Street	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

AUTO-ASSIGNMENT

SETTINGS



- ISITE Home
- Contact
- Help
- LTM
- Reports
- Chat

Edit Auto Assignment Districts

Find Auto Assignment

Date: Fri Sep 11 10:06:13 CDT 2015

Name: Arnold-Skidmore
Locator: BCasey

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
md	JTV01	N	Add
md	LT02	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



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 you will first need to specify the utility district code. First specify the relevant state using the **STATE DROP-DOWN** menu. Then click **FIND NOTIFICATION**.

SETTINGS

ONE CALL CONCEPTS
When safety is on the line.

ISITE Home

Contact

Help

LTM

Reports

Chat

Find Notification

Admin Home

Add Notification

Customer: 6

Date: Thu Sep 17 12:56:47 CDT 2015

State: MD

Choose a state and click Find Notification.

Find Notification

Next, specify the District Code using the **DISTRICT CODE DROP-DOWN** menu. Then click **FIND NOTIFICATION**.

SETTINGS

ONE CALL CONCEPTS
When safety is on the line.

ISITE Home

Contact

Help

LTM

Reports

Chat

Find Notification

Admin Home

Add Notification

Customer: 6

Date: Thu Sep 17 12:58:15 CDT 2015

State: MD

District Code: CBW04

Choose a district and click Find Notification.

Find Notification

Then click the **ADD NOTIFICATION** button. This will take you to the Edit Notification menu.

ADMINISTER/FIND NOTIFICATIONS - CONTINUED

- 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.)
- 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.)

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: Fri Sep 18 13:20:08 CDT 2015

District:

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

Headers:
☐ FIOS
☐ FTTP
☐ INSUFFICIENT NOTICE
☐ DESIGNER
☐ OMBN
☐ SHORT NOTICE
☒ EMERGENCY
☐ STANDARD

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

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

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.

REPORTS MENU

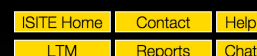
The Reports section provides options for running reports on several different aspects of LTM. The types of available Reports will vary depending on your level of customer access. Reports may be accessed via the iSite Menu bar at the upper-right corner of the LTM page.

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

REPORTS MENU

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 MENU



Custom Locate Details Summary Report

Date: Tue Sep 15 10:43:37 CDT 2015

Begin Date: 08/25/2015
End Date: 09/01/2015
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

