The background image shows a utility site at night. A circular manhole cover with a concentric ring pattern is in the foreground, surrounded by fallen leaves. A concrete path leads away from the manhole. Several green and red safety flags are placed around the area, and a white utility box is visible in the distance. The scene is illuminated by bright lights, creating a high-contrast, slightly hazy atmosphere.

**LOCATOR**  
TICKET MANAGEMENT

# BASIC

NOV. 2015

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# 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**

|                          |                 |
|--------------------------|-----------------|
| <input type="text"/>     | <b>USERNAME</b> |
| <input type="password"/> | <b>PASSWORD</b> |
| <b>LOGIN</b>             |                 |

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](mailto:moitic@occinc.com).

# 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.

ISITE MAIN MENU

-  NextGen®
-  LOCATOR  
TICKET MANAGEMENT
-  MESSAGES
-  LOGOUT



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

# 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 PAGE

The screenshot shows the top navigation bar with the 'LOCATOR TICKET MANAGEMENT' logo on the left and the 'ONE CALL CONCEPTS' logo on the right. The navigation menu includes buttons for 'ISITE Home', 'Admin', 'Contact', 'Reports', 'Help', and 'Chat'. A notification banner states 'You have 1 unviewed emergency ticket' for user 'occls-dwalters'. Below the navigation bar, there are buttons for 'Map Tickets' and 'Print Tickets'. The 'Change Current Display' section contains search filters for 'Ticket Set', 'District Code', 'Refine Search', and 'Date Received Between'. The search criteria are set to 'All Tickets in Production', 'All Districts', and a date range from '11/16/2015' to '11/23/2015'. A 'Show Tickets' button is located at the bottom right of the search area.

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

Map Tickets | Print Tickets

### Change Current Display

Ticket Set:  
District Code:  
Refine Search:  
Date Received Between:

All Tickets in Production  
All Districts  
Select Field =  
11/16/2015 and 11/23/2015  
Show Tickets

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

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

**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.

**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

The screenshot shows the LOCATOR Ticket Management interface. At the top left is the 'LOCATOR TICKET MANAGEMENT' logo. At the top right is the 'ONE CALL CONCEPTS' logo with the tagline 'When safety is on the line.' Below the logo is a navigation bar with buttons for 'iSITE Home', 'Contact', 'Help', 'Admin', 'Reports', and 'Chat'. A red notification banner states 'You have 1 unviewed emergency ticket' and identifies the user as 'iSite User: occls-dwalters'. Below the notification are 'Map Tickets' and 'Print Tickets' buttons. The 'Change Current Display' section contains search filters: 'Ticket Set' (All Tickets in Production), 'District Code' (All Districts), 'Refine Search' (Select Field), and 'Date Received Between' (11/16/2015 and 11/23/2015). A 'Show Tickets' button is located to the right of the date range. At the bottom, there is a row of filter buttons: Emergency, Viewed Emergency, Priority, Meeting, Past Due, Locked, and 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

This screenshot is similar to the previous one but with the 'Ticket Set' dropdown menu open. The dropdown menu lists the following options: 'All Tickets in Production' (which is selected and has a checkmark), 'Cancelled Tickets', 'Open Emergencies', 'Open Tickets', 'Open Tickets Due Today', 'Open Tickets Due within 2 Business Days', 'Tickets available for Statusing', and 'Tickets without Responses'. A blue line connects the text 'Choose the ticket set you'd like to display...' to the dropdown menu. The rest of the interface, including the search filters and filter buttons, remains the same as in the previous screenshot.

## 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 Contact Help  
Admin Reports Chat

You have 1 unviewed emergency ticket

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.

TICKET MANAGEMENT PAGE

**LOCATOR**  
TICKET MANAGEMENT

ONE CALL CONCEPTS  
When safety is on the line.

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

Emergency Viewed Emergency Priority Meeting Past Due

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

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

Click the **✖** button to clear all Refine Search criteria.

The screenshot shows the LOCATOR Ticket Management interface. At the top left is the 'LOCATOR TICKET MANAGEMENT' logo. At the top right is the 'ONE CALL CONCEPTS' logo with the tagline 'When safety is on the line.' and a navigation menu with buttons for 'ISITE Home', 'Contact', 'Help', 'Admin', 'Reports', and 'Chat'. A notification banner reads 'You have 1 unviewed emergency ticket' and 'iSite User: occls-dwalters'. Below the navigation are 'Map Tickets' and 'Print Tickets' buttons. The 'Change Current Display' section includes: 'Ticket Set: All Tickets in Production', 'District Code: MD - CBW04 (BALTIMORE CITY DPW-OCCLS)', 'Refine Search: Street = york' and 'County = baltimore', and 'Date Received Between: 11/17/2015 and 11/24/2015'. A 'Show Tickets' button is at the bottom right of the filter section. A filter bar at the bottom contains icons for 'Emergency', 'Viewed Emergency', 'Priority', 'Meeting', 'Past Due', 'Locked', and 'Multiple Auto-Assignments'. Blue lines connect the '+' and '✖' buttons in the 'Refine Search' section to the explanatory text above.

## 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.

This screenshot is identical to the one above, but the 'Date Received Between' filter is now set to '11/18/2015 and 11/18/2015'. A blue line connects the 'Show Tickets' button to the explanatory text above.

## Show Tickets

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

The screenshot shows the LOCATOR Ticket Management interface. At the top left is the 'LOCATOR TICKET MANAGEMENT' logo. At the top right is the 'ONE CALL CONCEPTS' logo with the tagline 'When safety is on the line'. Below the logos are navigation buttons: 'ISITE Home', 'Contact', 'Help', 'Admin', 'Reports', and 'Chat'. A notification bar indicates 'You have 1 unviewed emergency ticket' and shows the user as 'iSite User: occls-dwalters'. Below the navigation is a search area with 'Map Tickets' and 'Print Tickets' buttons. The 'Change Current Display' section contains search filters: 'Ticket Set' (All Tickets in Production), 'District Code' (MD - CBW04 (BALTIMORE CITY DPW-OCCLS)), 'Refine Search' (Street = york, County = baltimore), and 'Date Received Between' (11/18/2015 and 11/18/2015). A 'Show Tickets' button is located to the right of the date range. Below the filters is a legend for ticket status: Emergency (red triangle), Viewed Emergency (pink heart), Priority (yellow circle), Meeting (green arrow), Past Due (grey circle), Locked (grey padlock), and Multiple Auto-Assignments (grey icon). Below the legend, it says '5 ticket records found'. The main section is titled 'Tickets for District MD - CBW04 ( 11/18/2015 to 11/18/2015 )' and contains a table of ticket records.

| # ↑ ↓                    | Orig Call ↑ ↓  | Begin ↑ ↓ | Street ↑ ↓     | City ↑ ↓     | County ↑ ↓ | ST ↑ ↓ | District ↑ ↓ | Loc ↑ ↓ | Status ↑ ↓        |
|--------------------------|----------------|-----------|----------------|--------------|------------|--------|--------------|---------|-------------------|
| <a href="#">15759592</a> | 11/18/15 07:18 | 11/20/15  | 700 YORK RD    | TOWSON       | BALTIMORE  | MD     | CBW04        | 46      | Marked            |
| <a href="#">15759595</a> | 11/18/15 07:19 | 11/20/15  | 1040 YORK RD   | TOWSON       | BALTIMORE  | MD     | CBW04        | 46      | Marked            |
| <a href="#">15760336</a> | 11/18/15 09:22 | 11/20/15  | 305 YORK ROAD  | TOWSON       | BALTIMORE  | MD     | CBW04        | 46      | Marked            |
| <a href="#">15760481</a> | 11/18/15 09:39 | 11/20/15  | 2352 YORK ROAD | MIDDLE RIVER | BALTIMORE  | MD     | CBW04        | 46      | Not yet responded |
| <a href="#">15762466</a> | 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.

# 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, and adding internal notes.

## Ticket List (Button)

Click this button to return to the ticket list.

## Add Public Attachment (Button)

Click this button to upload a file attachment to the ticket. Public attachments can be viewed by the general public.

## Add Private Attachment (Button)

Click this button to upload a file attachment to the ticket. Private attachments cannot be viewed by the general public.

## Email Ticket (Button)

Click this button to send a copy of the ticket to an email address.

## 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.

TICKET VIEW

Iowa

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

**No unviewed emergency tickets**  
 Site User: christinw@occinc.com

Ticket List

Iowa One Call

**Ticket No:** 241931598

**Original Call Date:** 07/11/24 11:58 am

**Locates shall be completed no later than:** 07/16/24 06:00 am

**Beginning Work Date:** 07/18/24 06:00 am

**Duration:** 1 DAY

**Expiration Date:** 08/10/24

COMPLIANT

**Op:** webus99

**Op:** webus99

**TICKET ACTIONS**

Add Public Attachment
Add Private Attachment
Email Ticket

**CALLER INFORMATION**

**Caller Name:** CHRISTIN WEAVER **Phone:** 563-884-7768

**Excavator Information**

**Excavator Name:** IOWA ONE CALL **Phone:** 563-884-7768

**Address:** 4508 BRADY DAVENPORT, IA 52806 **Fax Phone:**

**Best Time:** AM: Y PM: After 5:00:

**Contact Email:** [christinw@occinc.com](mailto:christinw@occinc.com) **Phone:**

**Onsite Contact:**

**Excavation Information**

**Type of Work:** TESTING

**Work Being Done For:** OCC

**Trenching:** N **Boring:** N **Plowing:** N

**Backhoe:** Y **Blasting:** N **Other:** N

**Marked in White:** Y

**DIG SITE LOCATION**

**County:** FREMONT **City Limits:** N

**City:** BENTON TWP

**Work is on or along:** STATE HWY 2

**At:** DIKE RD

**Township:** BENTON TWP **Section, Qtr Section:** 30-SW

**Location of Work:** MARKING INSTRUCTIONS: MARK 5 FT EITHER SIDE OF THE FLAGGED ROUTE, MARK FOLLOWING THE ROUTE SE FOR 82 FT, FROM THE INTERSECTION OF STATE HWY 2 AND DIKE RD, HEAD NORTHEAST ON IA-2 E/250 ST FOR 0.222 MI. TURN RIGHT FOR 0.129 MI HEAD SW FOR 2 FT TO THE BEGINNING OF THE ROUTE.

**Remarks:**

**Coordinates for each location:**

**Polygon 1:**

|                           |                           |                           |
|---------------------------|---------------------------|---------------------------|
| (40.6771195, -95.8215948) | (40.6771024, -95.8215666) | (40.6770695, -95.8218117) |
| (40.6772171, -95.8218704) | (40.6772342, -95.8218986) | (40.6772771, -95.8218535) |

**MEMBERS NOTIFIED**

|         | District | Company Name                | Status            | <a href="#">Status History</a> |
|---------|----------|-----------------------------|-------------------|--------------------------------|
| Viewing | TEST02   | ONE CALL CONCEPTS TEST CODE | Not yet responded |                                |

**LOCATOR INFORMATION**

Past Work Start? N Ticket Locked? N Past Due Time: 07/16/24 06:00

Add Public Attachment
Add Private Attachment

**Private Attachments**  
None

**Public Attachments**  
None

**Status**  
Current Status: Not yet responded - Excavator has selected dynamic start option

**Change Status:** --

Save, Return to Ticket List and Refresh View
Save and Return to Ticket List
Save and Stay on This Ticket

**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.

**Status**

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

**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.

**Location of Work:** MARKING INSTRUCTIONS: MARK 5 FT EITHER SIDE OF THE FLAGGED ROUTE. MARK FOLLOWING THE ROUTE SE FOR 82 FT. FROM THE INTERSECTION OF STATE HWY 2 AND DIKE RD, HEAD NORTHEAST ON IA-2 E/250 ST FOR 0.222 MI. TURN RIGHT FOR 0.129 MI HEAD SW FOR 2 FT TO THE BEGINNING OF THE ROUTE.

**Remarks:**

**Coordinates for each location:**

**Polygon 1:**

|                             |                             |                             |
|-----------------------------|-----------------------------|-----------------------------|
| ( 40.6771195, -95.8215948 ) | ( 40.6771024, -95.8215666 ) | ( 40.6770595, -95.8216117 ) |
| ( 40.6772171, -95.8218704 ) | ( 40.6772342, -95.8218986 ) | ( 40.6772771, -95.8218535 ) |

**MEMBERS NOTIFIED**

| District       | Company Name                | Status            | Status History |
|----------------|-----------------------------|-------------------|----------------|
| Viewing TEST02 | ONE CALL CONCEPTS TEST CODE | Not yet responded |                |

**LOCATOR INFORMATION**

Past Work Start? N Ticket Locked? N Past Due Time: 07/16/24 06:00

**Private Attachments**  
None

**Public Attachments**  
None

**Status**  
Current Status: Not yet responded - Excavator has selected dynamic start option  
Change Status:

Your view of this ticket is

**Notes**

**History**

| Date              | Type                        | District                           | Display           | Locator | User   |
|-------------------|-----------------------------|------------------------------------|-------------------|---------|--------|
| 07/11/24 11:59:13 | Ticket Check Response Added | TEST02 ONE CALL CONCEPTS TEST CODE | Not yet responded | -       | System |
| 07/11/24 11:59:13 | Ticket Created              |                                    |                   | -       | System |

**Interactive Map**

**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.

## 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)

The screenshot shows the 'Interactive Map' interface. At the top left, there is a legend with a red box for 'Locate Polygon' and a light purple box for 'District Polygon'. Below the legend are three buttons: 'Popup Map', 'Hide Map', and 'Hide District Polygons'. A search bar labeled 'Search Map:' is positioned above the map. The map itself shows a street grid with a red rectangle highlighting a 'Locate Polygon' area. To the right of the map is a vertical toolbar with buttons for 'Occ', 'Sat', 'Google', 'Placemark', 'Measure', 'Identify', and 'Frame Polygon'. At the bottom right of the map, there are zoom controls (+ and - signs) and a 'Frame Polygon' button. The map also displays coordinates (Lat/Lon: 39.449984, -76.627364) and labels for 'Segment Length' and 'Total Length'.

## 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. **Zoom out** for an increased overall view by clicking on the minus (-) sign. [You can also zoom in and out by using the middle rolling button on your mouse when your mouse point is on the map.]

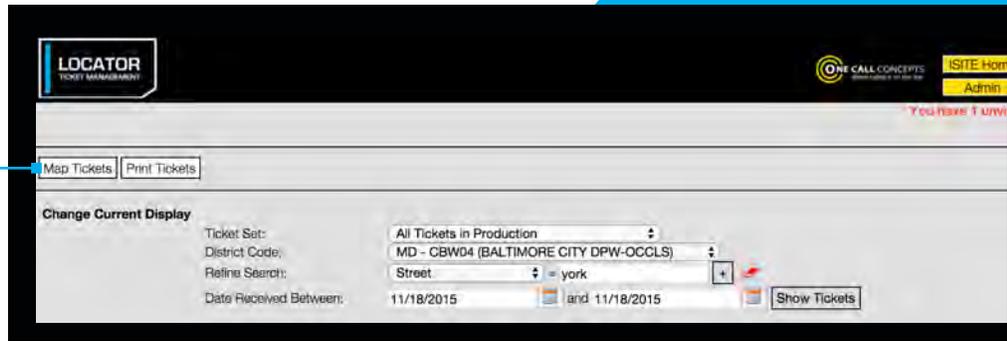
## Frame Polygon (Button)

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

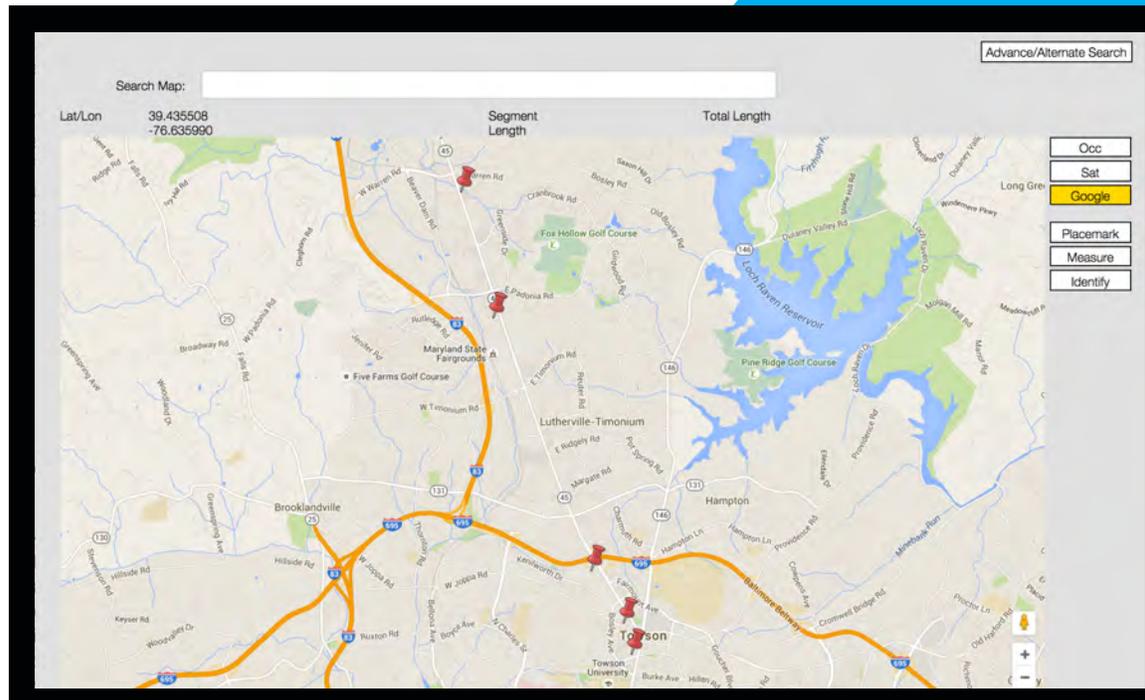
# MAP TICKETS

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

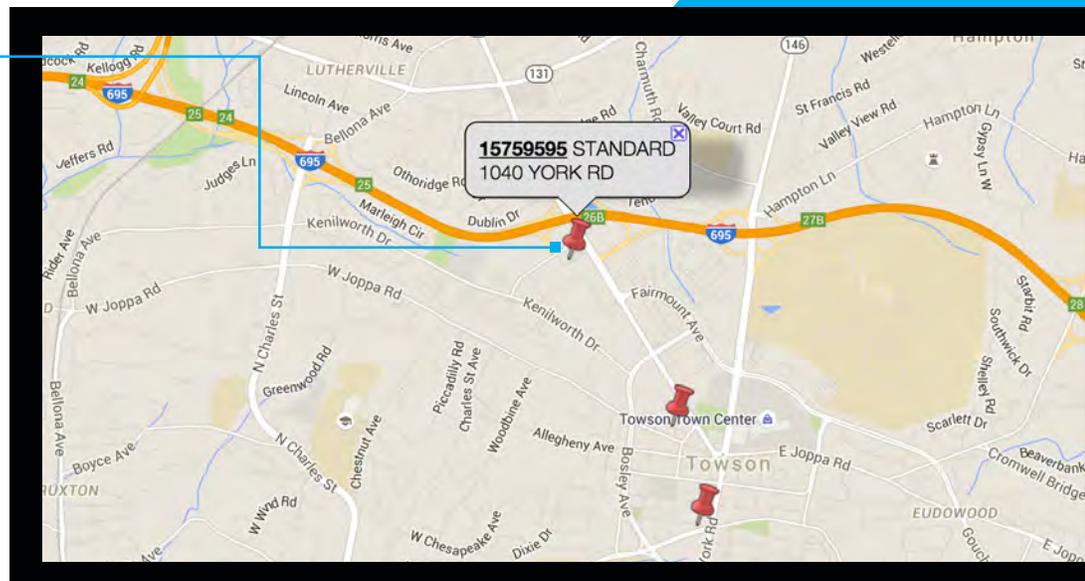
Once you have narrowed down your list of pending locate requests on the Ticket Management main page, click the **MAP TICKETS** button at the top of the screen.



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)

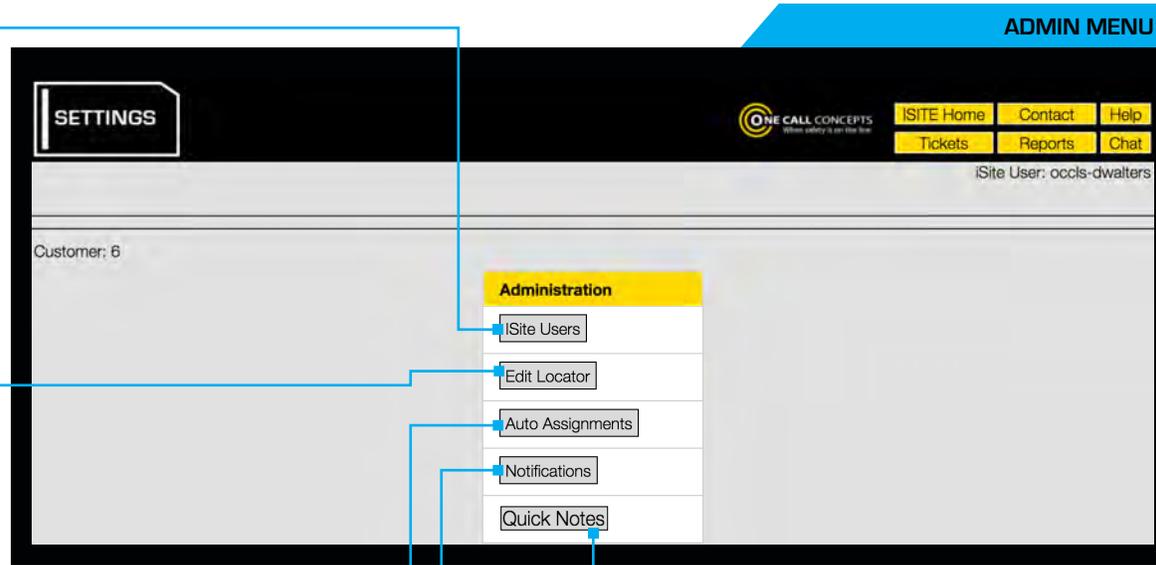
Gives administrators the ability to automatically assign locate tickets to locators based on the physical location of the work area.

## Notifications (Button)

Allows administrators to 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**

| Name                  | Email                 | States                    | Account              | Districts            | Print Footer         | Quick Notes          |
|-----------------------|-----------------------|---------------------------|----------------------|----------------------|----------------------|----------------------|
| briancasey@occinc.com | briancasey@occinc.com | MD MN MO                  | <a href="#">Edit</a> | <a href="#">Edit</a> | <a href="#">Edit</a> | <a href="#">Edit</a> |
| occls-ahaa            | dena@occls.com        | MD                        | <a href="#">Edit</a> | <a href="#">Edit</a> | <a href="#">Edit</a> | <a href="#">Edit</a> |
| occls-akea            | jwedding@occls.com    | MD                        | <a href="#">Edit</a> | <a href="#">Edit</a> | <a href="#">Edit</a> | <a href="#">Edit</a> |
| occls-amiller         | jwedding@occls.com    | No States Have Been Setup | <a href="#">Edit</a> | <a href="#">Edit</a> | <a href="#">Edit</a> | <a href="#">Edit</a> |
| occls-ascott          | blamb@occls.com       | No States Have Been Setup | <a href="#">Edit</a> | <a href="#">Edit</a> | <a href="#">Edit</a> | <a href="#">Edit</a> |
| occls-awest           | blamb@occls.com       | No States Have Been Setup | <a href="#">Edit</a> | <a href="#">Edit</a> | <a href="#">Edit</a> | <a href="#">Edit</a> |
| occls-bcahall         | jimmy@occls.com       | No States Have Been Setup | <a href="#">Edit</a> | <a href="#">Edit</a> | <a href="#">Edit</a> | <a href="#">Edit</a> |

**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.

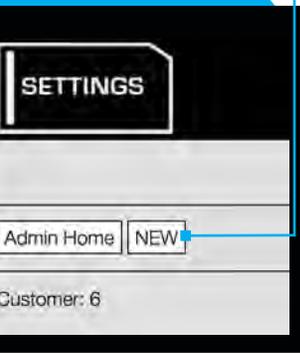
**Edit Quick Notes (Button)**

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.

## NEW USER



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

## CREATE ISITE USER PAGE

A screenshot of the 'CREATE ISITE USER PAGE' form. The form is titled 'SETTINGS' and contains several fields for user creation. The fields are: 'iSite User' (text input with 'BCassidy'), 'Password' (password field with '\*\*\*\*\*'), 'Email' (text input with 'brennancassidy@occls.c'), 'Default State' (dropdown menu with 'Maryland'), 'Default Ticket Set' (dropdown menu with 'All'), 'Default District' (dropdown menu with 'MD - CBW04 - BALTIMORE CITY DPW-OCCLS'), 'Role' (dropdown menu with 'This is a Locator and Ticket Check user - roles 2 and 7'), 'Last Login' (text input), and 'Is Active' (checkbox with 'Active'). There is also a 'State' list on the left side of the form with a scroll bar. A 'Save' button is at the bottom. The form is titled 'CREATE ISITE USER PAGE' in the top right corner.

### 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.

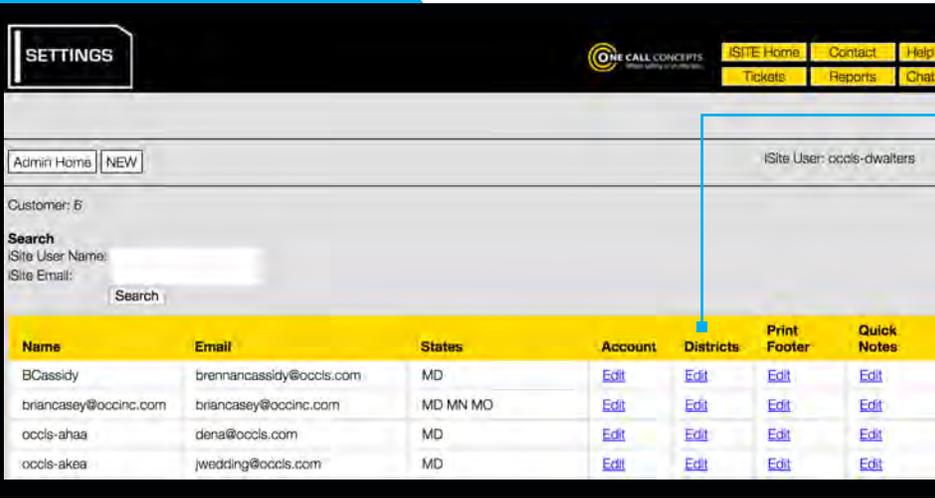
**State**  
Will determine what state(s) the user has access to.

**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.

# 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

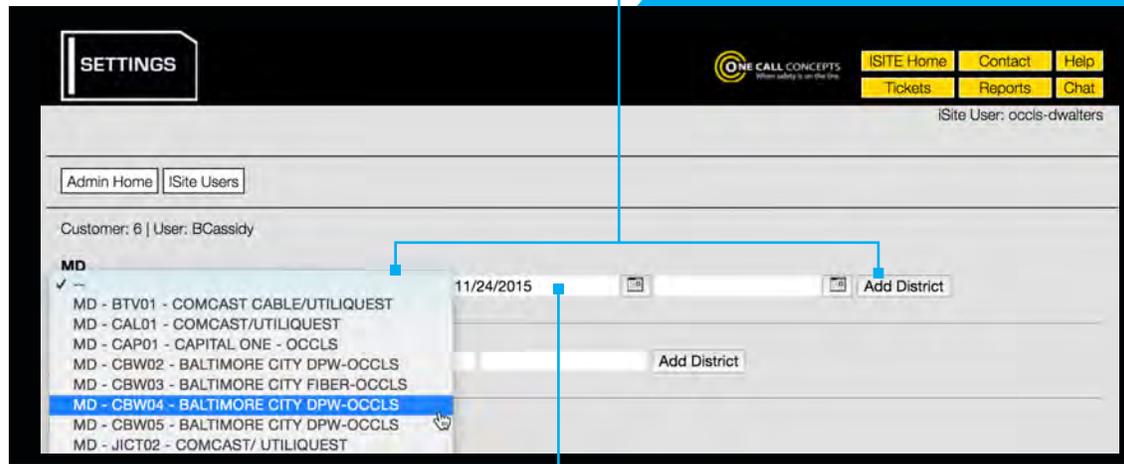


Click **EDIT** under the Districts column. This will bring you to the Edit Districts page.

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

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.

## EDIT DISTRICTS PAGE

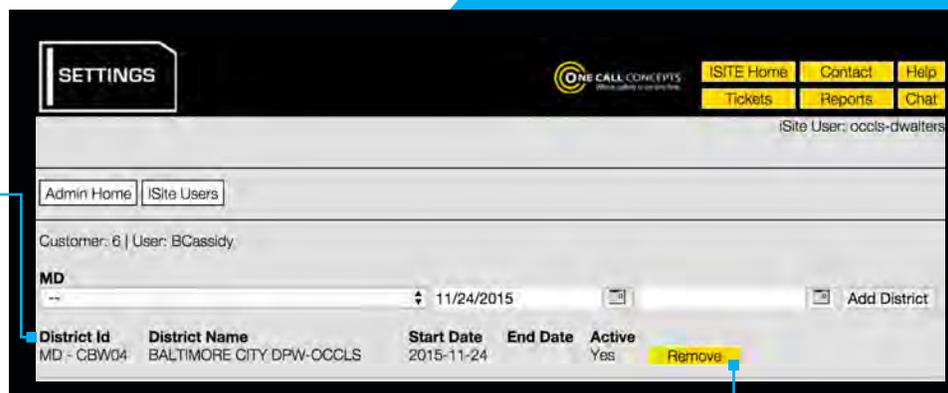


**\* NOTE: Setting an End Date is optional. If you'd like to leave access open-ended simply leave the contents of the End Date field blank before clicking the ADD DISTRICT button.**

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.

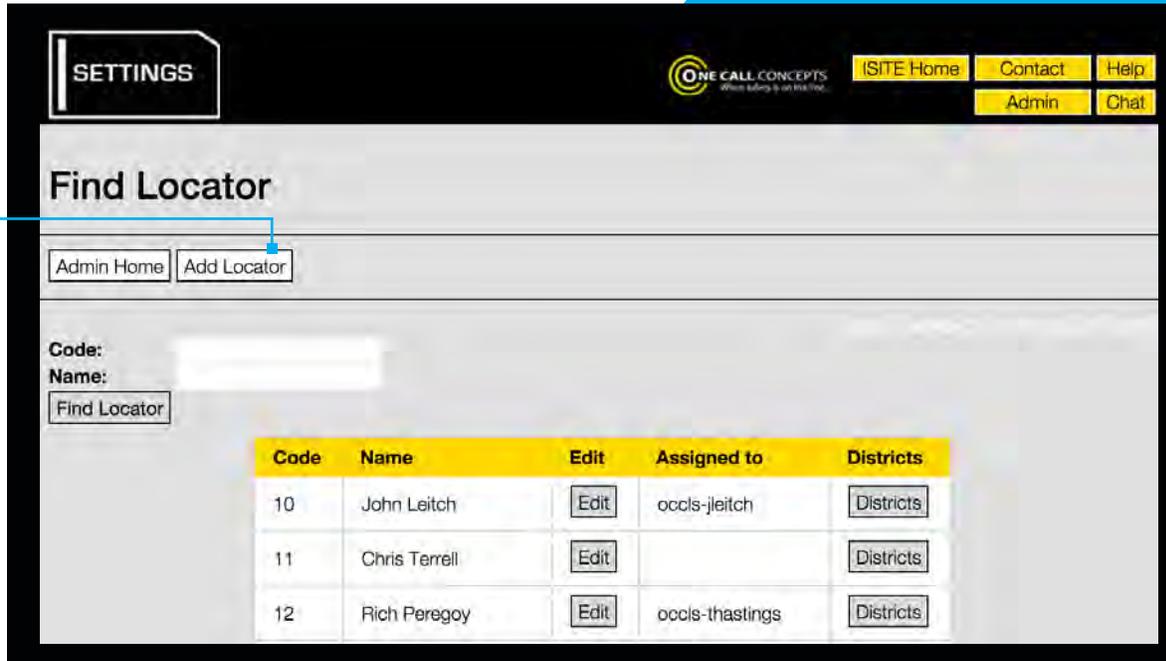
## EDIT DISTRICTS PAGE



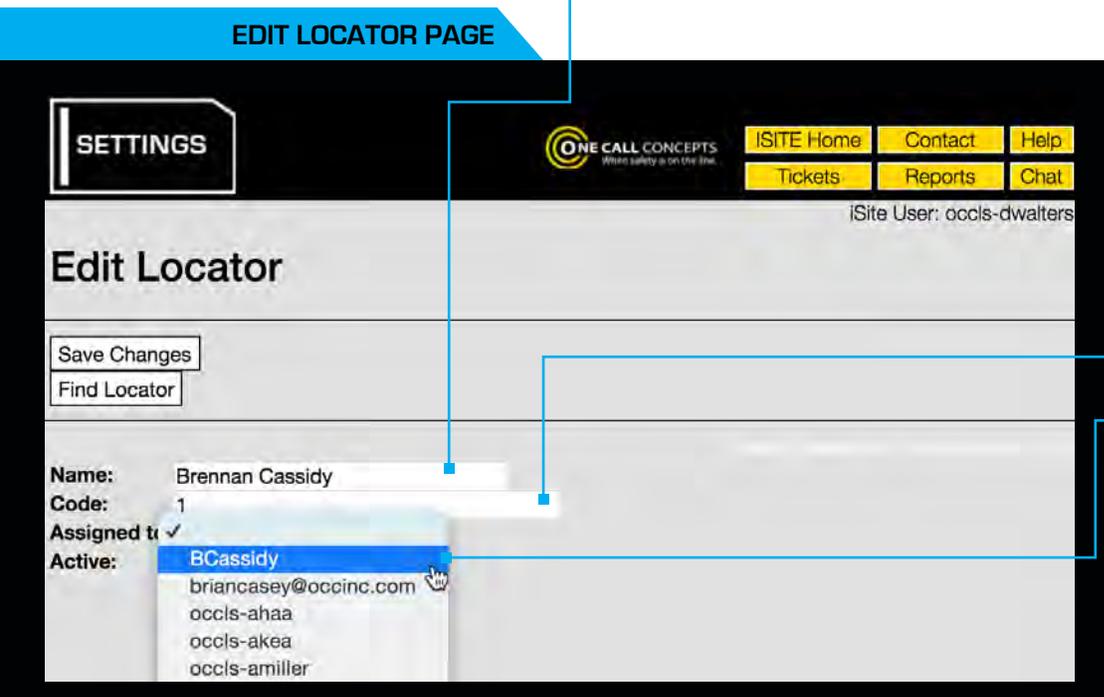
# EDIT LOCATOR

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.



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.)

# EDIT LOCATOR - CONTINUED

## EDIT LOCATOR PAGE

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](#)

**Code:**   
**Name:**

[Find Locator](#)

| Code | Name            | Edit                 | Assigned to   | Districts                 |
|------|-----------------|----------------------|---------------|---------------------------|
| 1    | Brennan Cassidy | <a href="#">Edit</a> | BCassidy      | <a href="#">Districts</a> |
| 10   | John Leitch     | <a href="#">Edit</a> | occls-jleitch | <a href="#">Districts</a> |

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

## EDIT LOCATOR PAGE

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.

**SETTINGS** **ONE CALL CONCEPTS** When safety is on the line. [iSITE Home](#) [Contact](#) [Help](#) [Tickets](#) [Reports](#) [Chat](#)

iSite User: occls-dwalters

### Edit Locator Districts

[Admin Home](#) [Find Locator](#)

**Name:** Brennan Cassidy  
**Code:** 1

| State | Dist Code | Granted? | Action                 |
|-------|-----------|----------|------------------------|
| md    | BTV01     | N        | <a href="#">Add</a>    |
| md    | CAL01     | N        | <a href="#">Add</a>    |
| md    | CAP01     | N        | <a href="#">Add</a>    |
| md    | CBW02     | N        | <a href="#">Add</a>    |
| md    | CBW03     | N        | <a href="#">Add</a>    |
| md    | CBW04     | Y        | <a href="#">Remove</a> |

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

# 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.

## NEW QUICK NOTE SETUP

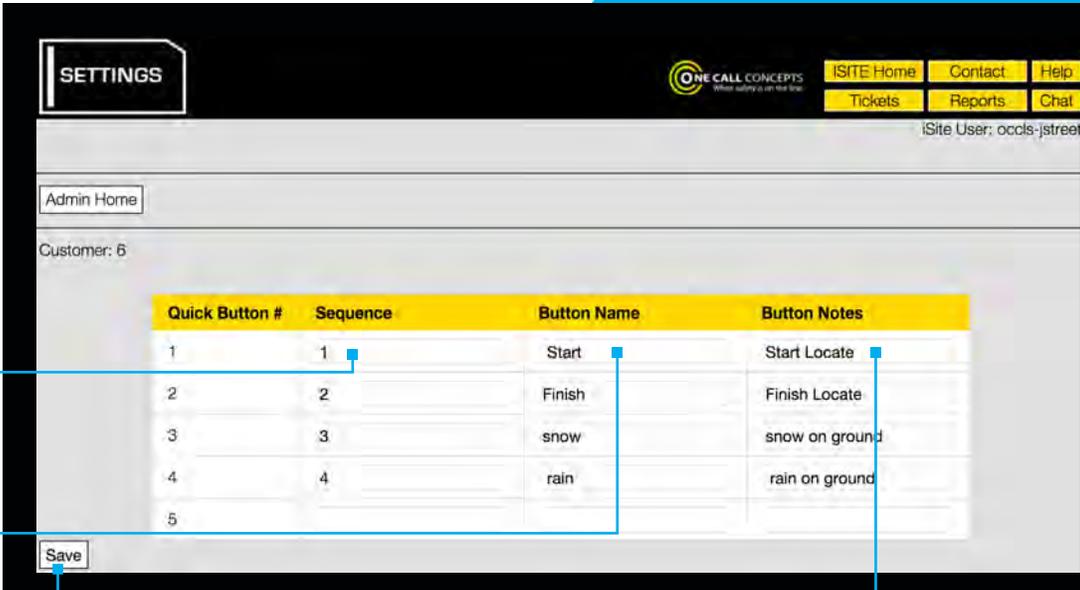
To create a Quick Note choose an empty Quick Note slot and fill out the appropriate fields.

### 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.

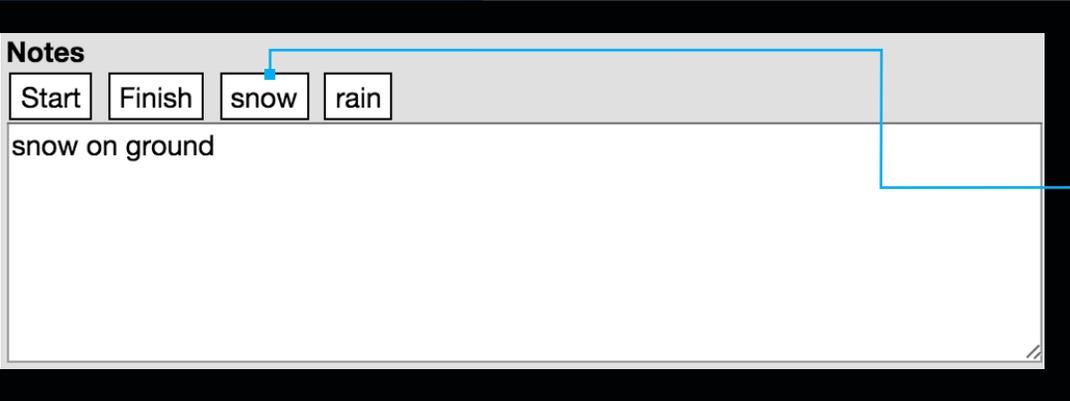


### Button Notes

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



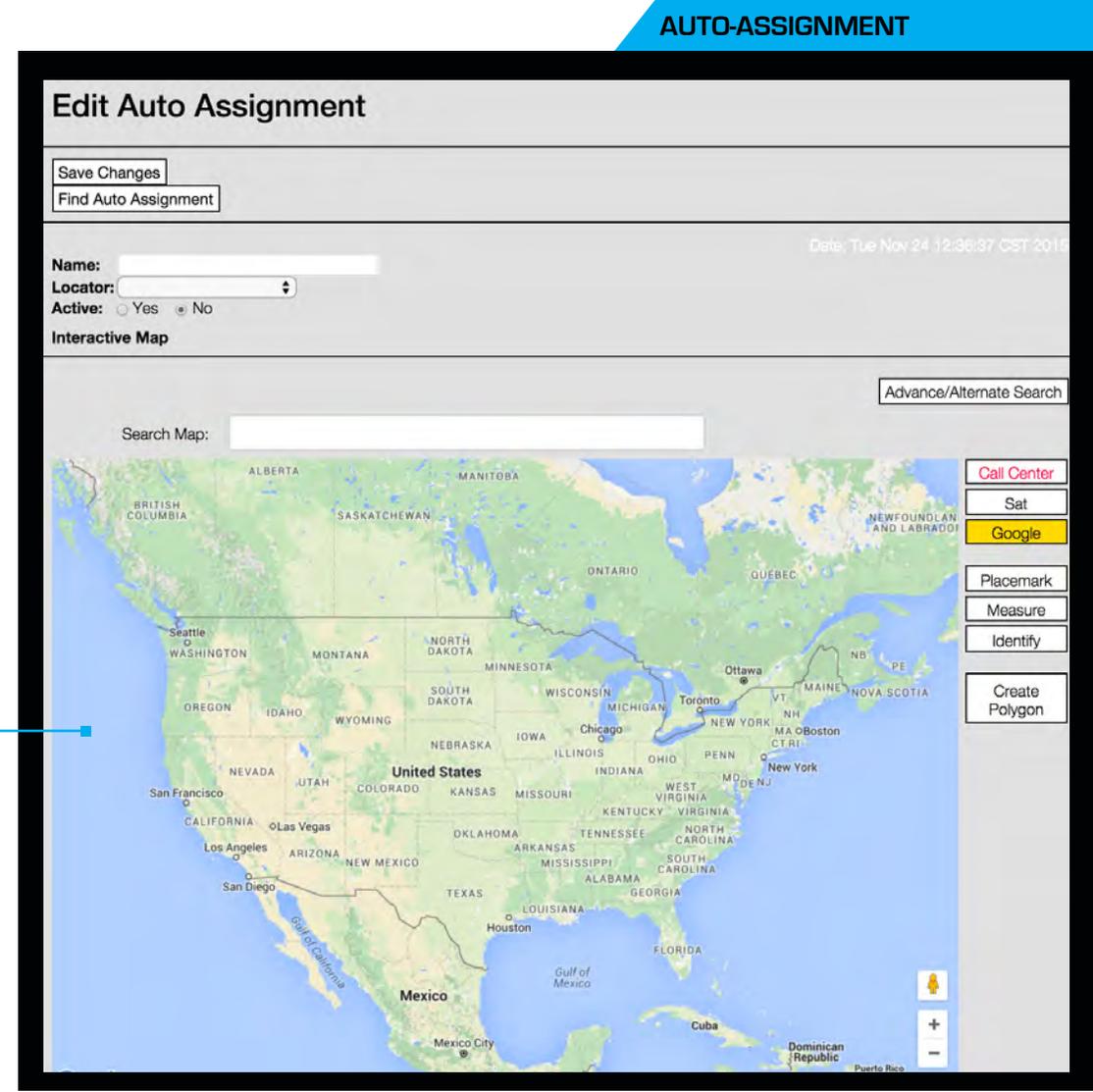
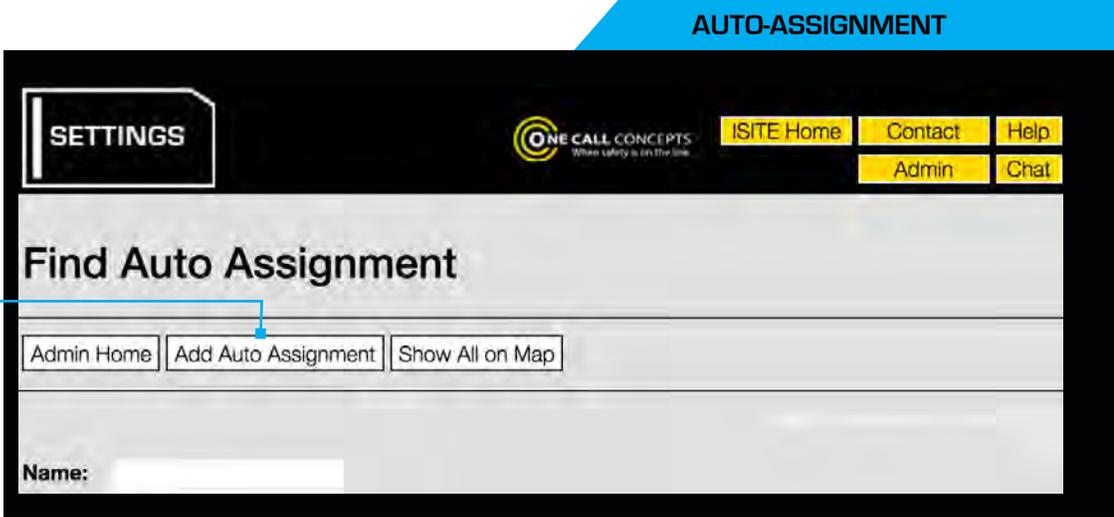
When viewing the ticket you may now simply click the **QUICK NOTE** button to add the entire note in the Notes field.

# 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.



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 12:50:37 CST 2015

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

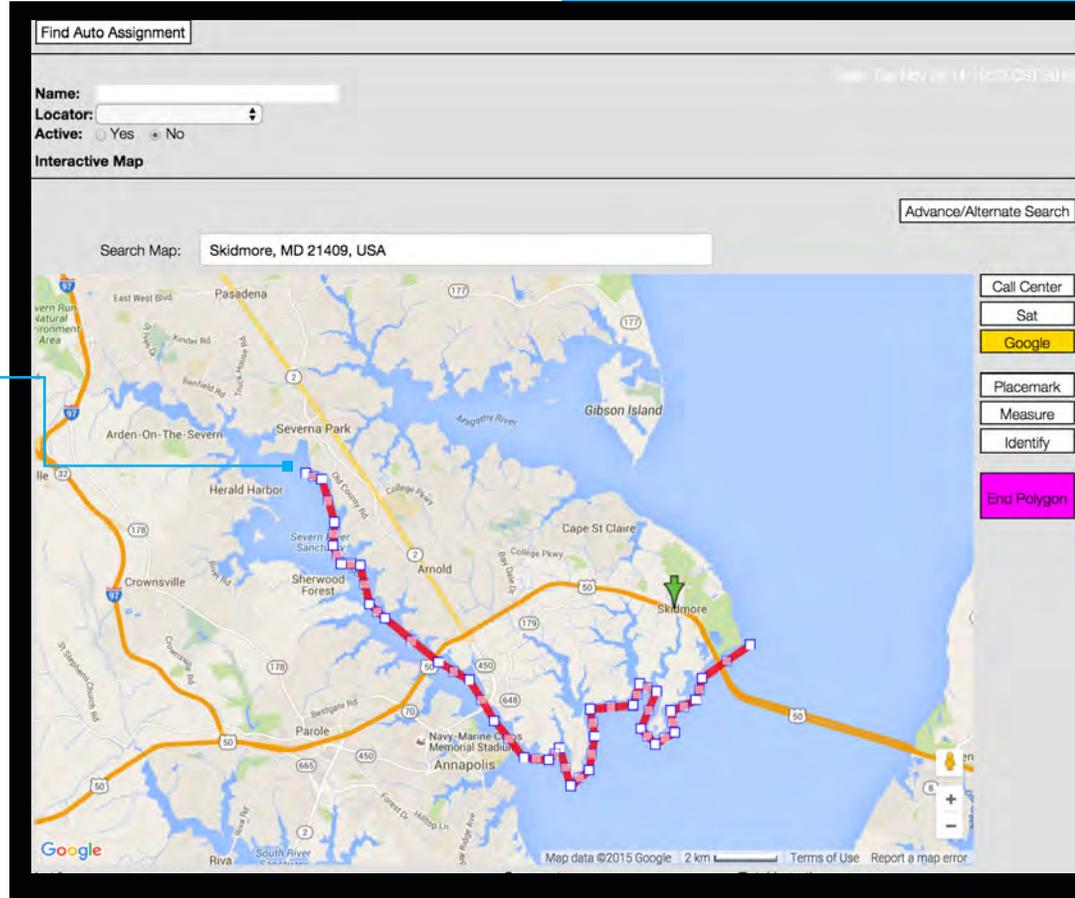
Interactive Map

Search Map: Skidmore, MD 21409, USA

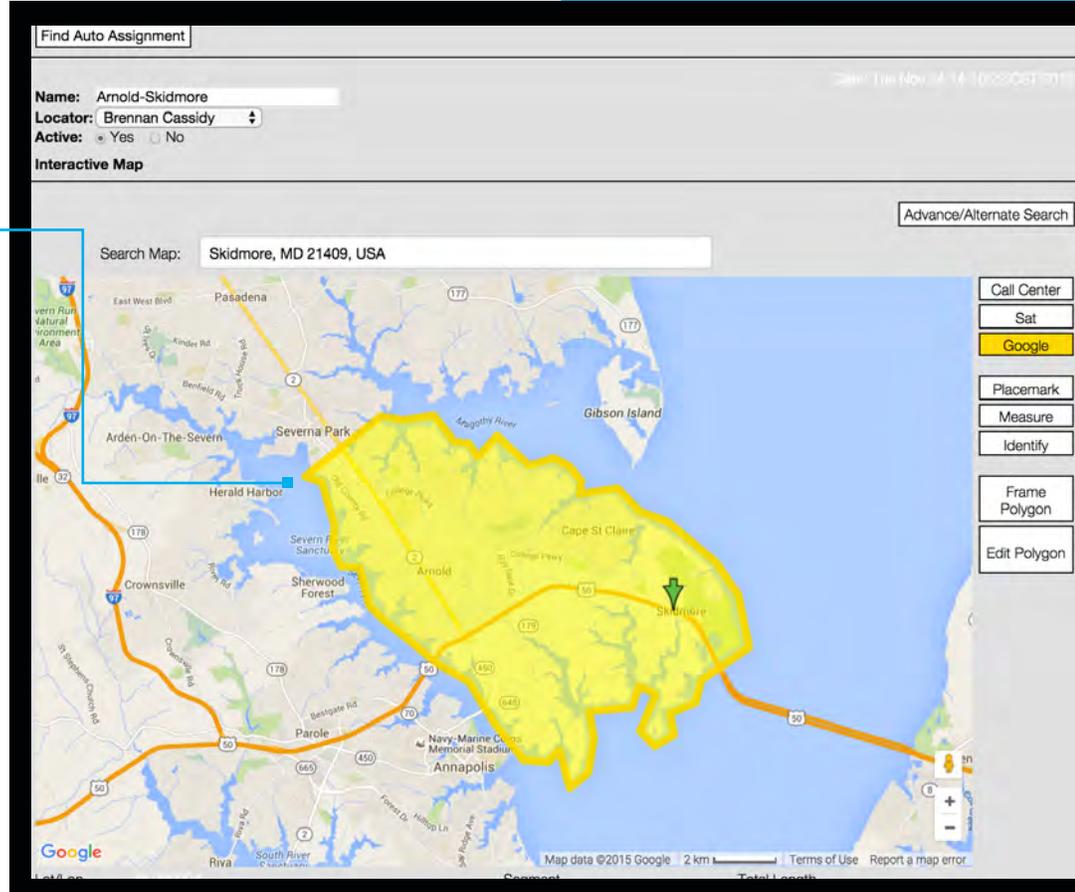
Call Center  
Sat  
Google  
Placemark  
Measure  
Identify  
Create Polygon

Lat/Lon: 36.989579, -77.027143  
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

### 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.

| 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.

# ADMINISTER AUTO-ASSIGNMENTS - CONTINUED

## 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

**Name:** Arnold-Skidmore  
**Locator:** Brennan Cassidy

| State | Dist Code | Granted? | Action |
|-------|-----------|----------|--------|
| md    | BTW01     | 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.

# 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

When safety is on the line.

FIND NOTIFICATIONS

Admin Home

Customer: 6

Notifications for MD:

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 | <input type="button" value="Edit"/> |

Notifications for Other States:

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 | <input type="button" value="Edit"/> |
| NC    | Yes     | CHA02    | 2404729401 |                    | 07:00:00 | 15:30:00 | N | Y | Y | Y | Y | Y | N | <input type="button" value="Edit"/> |
| NC    | Yes     | CHA02    |            | dispatch@occls.com |          |          | Y | Y | Y | Y | Y | Y | Y | <input type="button" value="Edit"/> |
| NC    | Yes     | CHA03    |            | dispatch@occls.com |          |          | Y | Y | Y | Y | Y | Y | Y | <input type="button" value="Edit"/> |

# ADMINISTER/FIND NOTIFICATIONS - CONTINUED

**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**

The screenshot shows the 'Edit Notification' form with the following fields and callouts:

- SETTINGS** button in the top left.
- ONE CALL CONCEPTS** logo and navigation buttons: **ISITE Home**, **Contact**, **Help**, **Admin**, **Chat**.
- Edit Notification** title.
- Save Changes** and **Find Notification** buttons.
- District:** CBW04 (callout: District)
- Email:** (callout: Email)
- SMS Provider:** (153) Verizon PCS (callout: SMS Provider)
- SMS Phone:** 5555555555 (e.g. 3244532560) (callout: SMS Phone)
- 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 (callout: Day(s) of Week)
- Enabled:** Yes (callout: Enabled)
- Headers:**  DESIGNER,  EMERGENCY,  FIOS,  FTTP,  INSUFFICIENT NOTICE,  OMBN,  SHORT NOTICE,  STANDARD (callout: Headers)

**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.**

# 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   |
|---|---|
| <a href="#">Billed Tickets</a>          | 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.   |
| <a href="#">Closed Tickets</a>          | 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.  |
| <a href="#">District Detail</a>         | Provides details by district code per day for the provided date range. This includes a summary of tickets received and statuses made.   |
| <a href="#">District Summary</a>        | Provides the Summary by District Code for the Tickets Received and Statuses provided. This report is for Ticket Check centers.  |
| <a href="#">Excavator Address</a>       | This report provides a list of company and the excavator address ticket summary based on the information entered in the search input.   |
| <a href="#">Locate Details</a>          | 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.   |
| <a href="#">Ticket Audit</a>            | This report provides a list of transmissions received for a district code for the requested date range.   |
| <a href="#">Ticket Check Compliance</a> | This report provides on time, late and not responded tickets for a given timeframe, ticket header(s) and district code(s)   |
| <a href="#">Ticket Location</a>         | 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.   |
| <a href="#">Ticket Marked</a>           | 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).   |
| <a href="#">Work Done For</a>           | 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

REPORTS



iSITE Home

Contact

Help

Tickets

Reports

Chat

### Custom Locate Details Summary Report

---

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

**Begin Date:**

**End Date:**

**District Code:**




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