

## 1. Welcome to Damage Prevention Portal

### 1.1 What is the Damage Prevention Portal?

The Damage Prevention Portal (DPP) is a free tool for our membered utility operators that gives them self-serve options to manage their membership. This includes:

- Receive & respond to dig tickets.
- Ticket reporting and re-sends.
- Managing your AOI's (Area of interest formerly known as service area).
- Manage your ticket transmissions (Subscriptions).
- Manage your memberships contact information.

## 2. Your Account

### 2.1 Registering with the Damage Prevention Portal

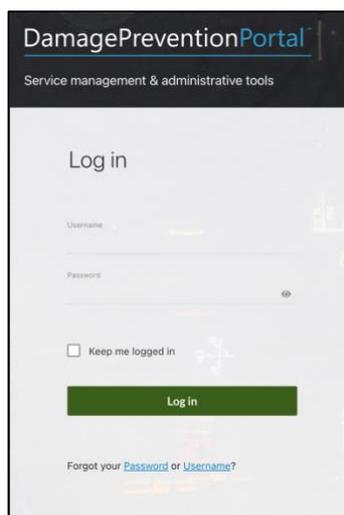
Pelican uses a 'single sign-on' approach with the Damage Prevention Portal which means if you don't already have an account, then you will need to first create one in One Call Access first.

**Note: One Call Access is for submitting dig tickets online, but even if you aren't going to be submitting tickets, you will need to create your credential there first before getting access to the Damage Prevention Portal.**

Once you have completed the sign-up process in One Call Access, you will receive an email with a link to verify your email address. After you have created your account and verified your email address, you will need to be promoted to the Damage Prevention Portal by a representative from our Member Services Department. This can be done by sending an email to: [memberservices@usan.org](mailto:memberservices@usan.org). Please make sure to include your One Call Access username and the company name you will need access to.

### 2.2 Logging in and out

To log in, type your username and password in the Log In panel as shown below:



The screenshot shows the login interface for the Damage Prevention Portal. At the top, the title "DamagePreventionPortal" is displayed in a dark header, with the subtitle "Service management & administrative tools" below it. The main content area is titled "Log in" and contains two input fields: "Username" and "Password". Below the password field is a checkbox labeled "Keep me logged in". A green "Log in" button is positioned below the checkbox. At the bottom of the form, there is a link that reads "Forgot your Password or Username?".

If you don't remember your username or password, then please click on the 'Forgot your Password or Username?' links below.

**Note: Please make sure you are logging in to the correct site according to your membership state. If you have a membership in both states, then you will need a separate user account for each:**

California: <https://appsca.undergroundservicealert.org/pcadmin/Account/Login>

Nevada: <https://appsnv.undergroundservicealert.org/pcadmin/Account/Login>

Once you have successfully logged in, you will be taken to the DPP Dashboard.

### 3. Dashboard

#### 3.1 Terms

**MTD** = Month to Date

**YTD** = Year to Date

**Tickets** = Incoming tickets/requests from customers

**Notifications** = Notifications sent to Authorities (e.g. utilities) via email, ftp, etc.

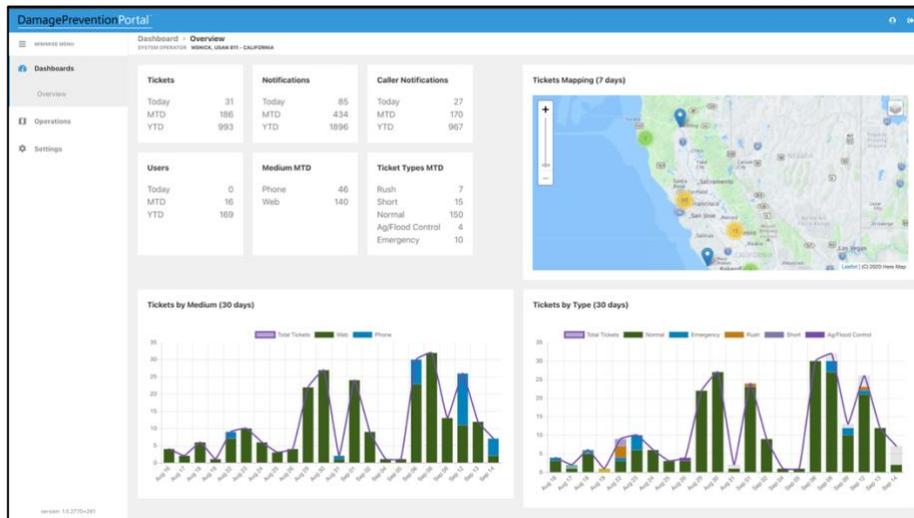
**Caller Notifications** = Outgoing responses to customers

*Please note that all dashboards update approximately every 5 minutes.*

#### 3.2 Dashboard Overview

The Dashboard is broken up in to the following four quadrants:

1. Ticket and Notification stats (top left)
2. Ticket Mapping (top right)
3. Tickets by Medium (bottom left)
4. Tickets by Type (bottom right)



### 3.3 Ticket and Notification Stats

- **Tickets:** Total number of tickets – shown for: Today, month-to-date and year-To-date.
- **Notifications:** Total number of notifications sent to the relevant asset owner – shown for: Today, month-to-date and year-to-date.
- **Caller Notifications:** Total number of caller notifications sent to customers – shown for: Today, month-to-date and year-to-date.
- **Users:** Total number of new users - shown for: Today, month-to-date and year-to-date.
- **Medium MTD:** Total number of tickets for the month to date – shown according to the medium the tickets came in by (Phone or Web).
- **Tickets by Type:** Total number of tickets for the month to date – shown according to the Ticket Type.

Dashboard > Overview  
SYSTEM OPERATOR MSNICK, USAN 811 - CALIFORNIA

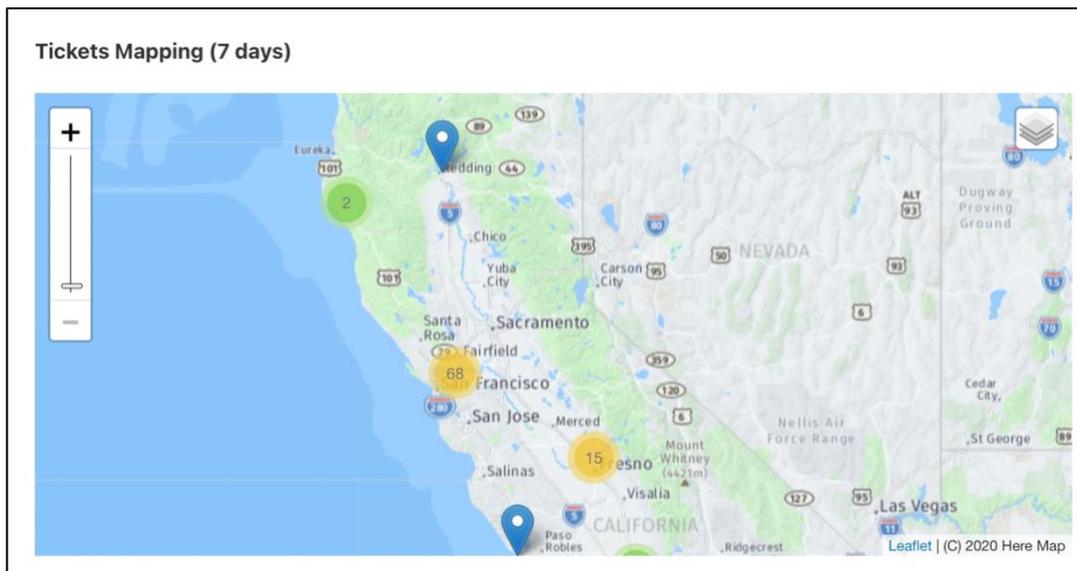
Tickets		Notifications		Caller Notifications	
Today	31	Today	85	Today	27
MTD	186	MTD	434	MTD	170
YTD	993	YTD	1896	YTD	967

Users		Medium MTD		Ticket Types MTD	
Today	0	Phone	46	Rush	7
MTD	16	Web	140	Short	15
YTD	169			Normal	150
				Ag/Flood Control	4
				Emergency	10

### 3.4 Ticket Mapping

Showing the location of tickets requested:

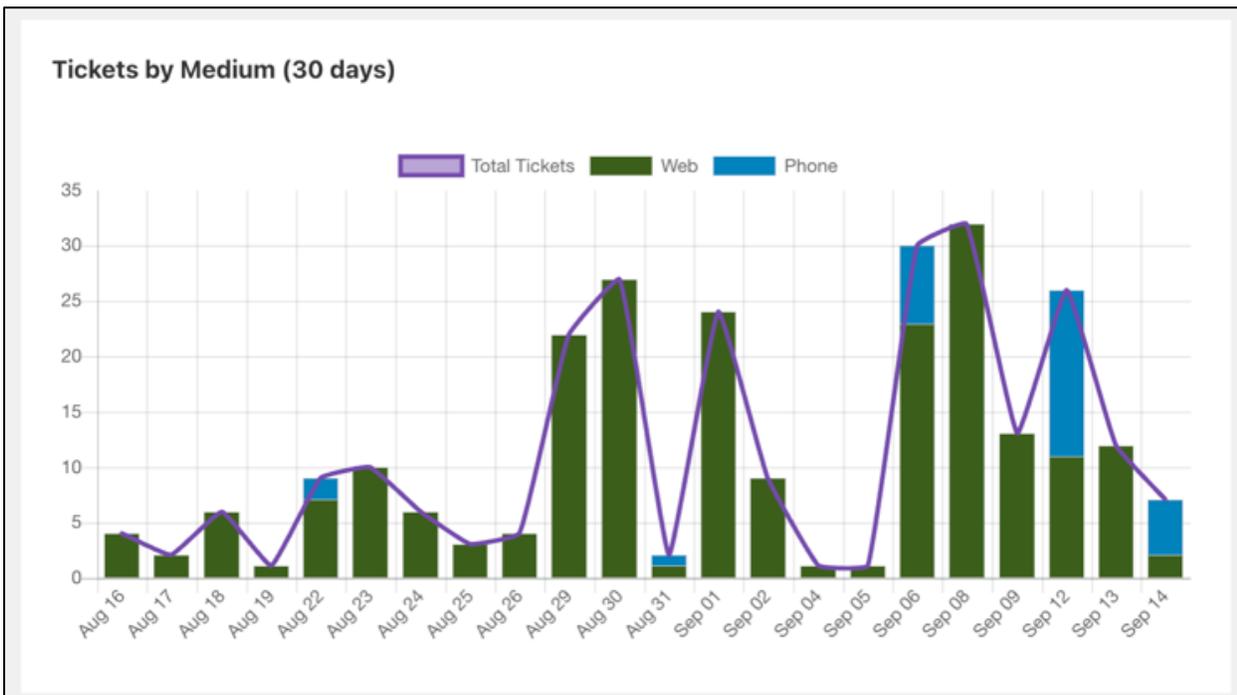


- Shows the location of all the tickets for the last 30 days.
- Shown as a heat map and/or cluster map.
- Only a reference and won't show specific ticket data (see **Explore Your Data** for specific ticket details).

### 3.5 Tickets by Medium

Shows the total number of tickets with break down into how they were received:

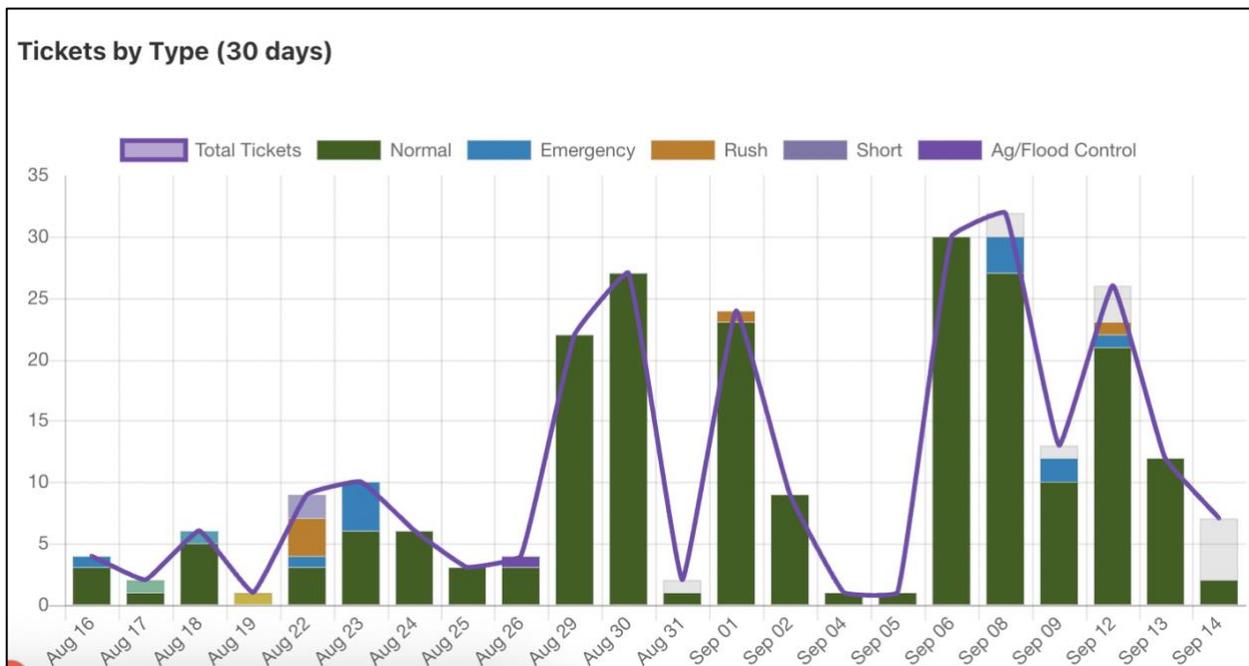
- Web or Phone



### 3.6 Tickets by Type

Shows the total number of tickets and then breaks them down into the various ticket types:

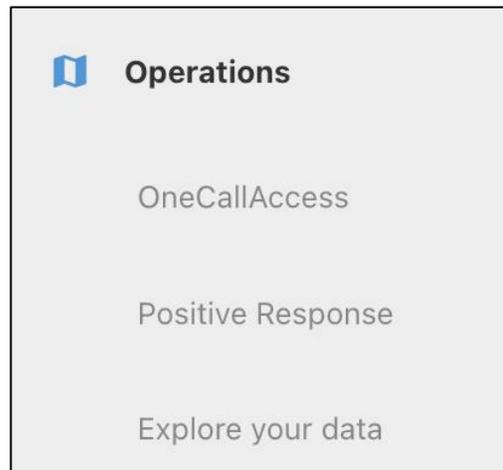
- Total Tickets, Normal, Emergency, Rush, Short, Ag/Flood Control



## 4. Operations

Under **Operations** is listed all the services the logged in user has been given access to. These can include **One Call Access**, **Positive Response**, and **Explore Your Data** (These options will vary depending on your assigned user role).

Through each service, users can perform various functions related to their membership. Please see detailed explanation of each service and how to use them below.



### 4.1 One Call Access

#### 4.1.1 Ticket Notification Delivery

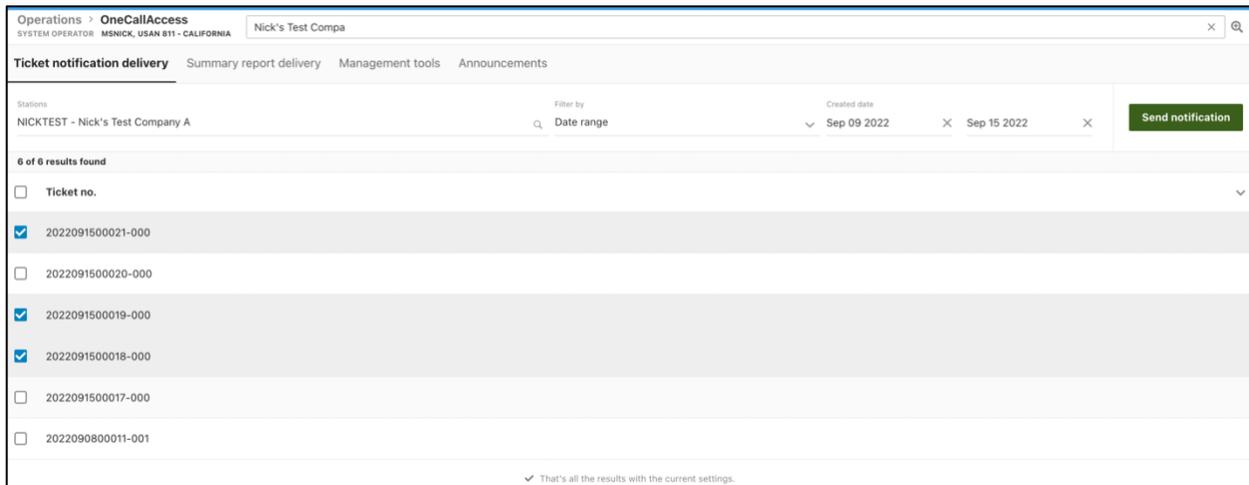
**Navigation: Operations>OneCallAccess>Ticket Notification Delivery**

Ticket notification delivery is used to forward or resend tickets you have received. The default page will show a list of ticket notifications delivered to you as the utility member. Here a user can use the filters at the top of the tool bar to filter by Station Code (if you have more than one), Date Range, Individual Ticket Number, or a Range of Tickets:

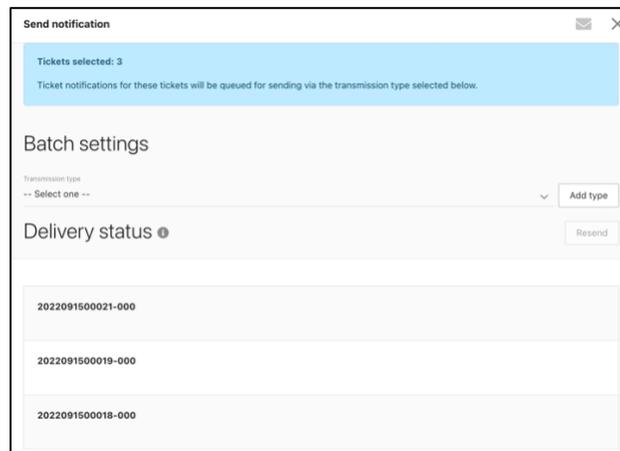


Date Range uses the Created Date field on tickets. This range defaults to a few days prior to the current date. You can sort the table according to ticket number in increasing or decreasing order by clicking on the heading labeled Ticket no.

Once you have found the tickets you need to resend, simply click the box to the left of the ticket number (or check the box next to Ticket no. to select all) and then click the green **Send Notification** button at the top right-hand corner of the screen:



Clicking the green **Send Notification** button will open the Send notification side menu:



If you have selected multiple tickets, those ticket numbers will appear at the bottom of **Delivery Status**. Next, select what transmission type you would like these notifications to be sent to or add a new transmission type by clicking the **Add Type** button. Once your transmission type has been added, click the envelope icon at the top right corner to send the tickets. A small confirmation box will appear at the bottom of the screen saying the Ticket notifications successfully queued:



and the Deliver Status will be updated to show date, time, and success of resend:



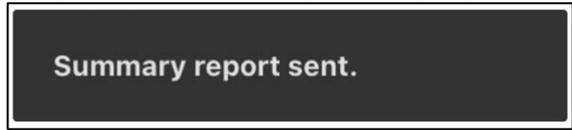
### 4.1.2 Summary Report Delivery

Summary reports provides daily overviews of how many tickets have been received for each station code (formerly known as end-of-day audits). Each day's summary report will be listed on the table as shown below:

Operations > OneCallAccess			
SYSTEM OPERATOR: MENICK, USAN 811 - CALIFORNIA		Nick's Test Compa	
Ticket notification delivery   <b>Summary report delivery</b>   Management tools   Announcements			
Stations	Label	Created date	
NICKTEST - Nick's Test Company A	Include summary reports with 0 ticket	Sep 09 2022	X Sep 15 2022 X <span>Send Report</span>
<input type="checkbox"/> Date			Tickets
<input type="checkbox"/> Sep 15, 2022			5
<input type="checkbox"/> Sep 14, 2022			0
<input type="checkbox"/> Sep 13, 2022			0

Like with **Ticket notification delivery**, you can toggle between your different station codes (if you have more than one) using the 'Stations' filter. It will list the date and the number of tickets successfully received on that date. You can filter by station code, a specific date, or a date range. You can also choose to include or exclude summary reports that have a value of 0 notifications for that date.

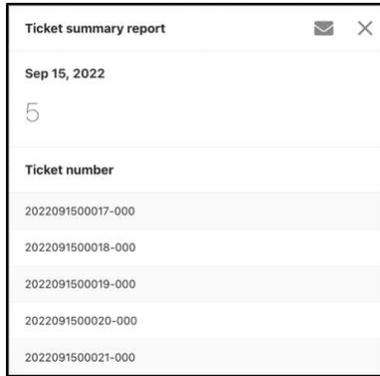
To send a report, select the desired date(s) and then click the green **Send Report** button. If it was successful, then you will see a pop-up box at the bottom right-hand corner saying 'Summary report sent':



You can also send an individual day's report by clicking on the date:



which will pop-open a side window to display all the tickets received for that day and allow you to send it by clicking on the envelop icon in the top right-hand corner:

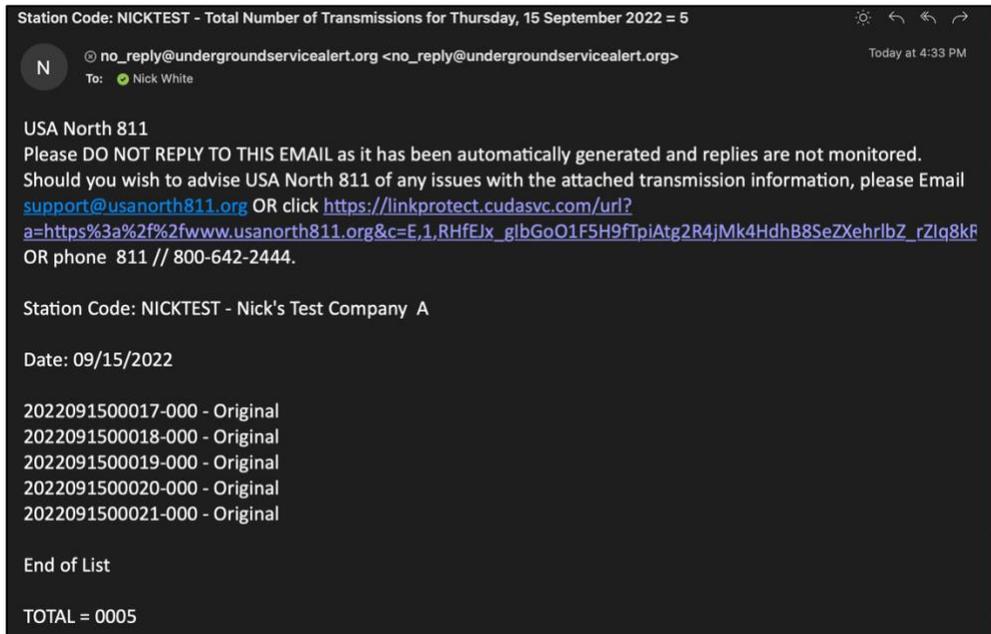


**Note: Your ticket summary reports are sent to the email address listed in **Station code details** under **Summary report settings**:**



You can access this (depending on your user Role) by going to Settings>OneCallAccess and clicking on the station code. If your Summary report fails to send, then you probably don't have this set up.

Here is an example of what a Summary Report looks like:



## 4.2 Positive Response

**Navigation:** Operations>Positive Response

Positive Response is designed to allow users to respond to locate requests they receive for their membership. The default view will open the list of unassigned tickets that are awaiting a response. You can sort the table by clicking on the headings to sort by increasing or decreasing values. As with OneCallAccess features, you can filter the table by station code, the Response Code, the date range, individual ticket number, or work location:

Due by	Response code	Ticket type	Due by date	Start date	End date	Work location
Sep 19, 2022, 05:01:00 PM	Unassigned	Normal	no.	91500019-000		1080 Azuar Drive Vallejo California 94592

If there is an unassigned emergency ticket in Positive Response, it will be color-coded orange to differentiate it from non-emergency tickets:

Sep 27, 2022, 05:01:00 PM	Unassigned	Emergency	2022092300003-003	1310 Club Dr Vallejo California 94592
---------------------------	------------	-----------	-------------------	---------------------------------------

To view an individual tickets details, click on the ticket to open the full ticket details:

2022092100002-000
Additional details
✕

### Contractor details

Company

---

Contractor name  
Nick White

---

Email  
nick.white@usanorth811.org

---

Primary phone number      Mobile number  
9257688561

---

### Worksite details

Ticket number      Submitted on  
2022092100002-000      Sep 21, 2022, 03:03:22 PM

---

Ticket type      Due by  
Normal      Sep 23, 2022, 05:01:00 PM

---

Revision date      Revision details  
Sep 21, 2022, 03:03:22 PM      Continue

---

Address  
1750 Club Dr Vallejo CA 94592

---

Type of work  
Utilities - Distribution

### Response code status

UNASSIGNED

Response code  
-- Select one --

---

Notes

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Show these notes when a contractor views this ticket in PositiveResponse

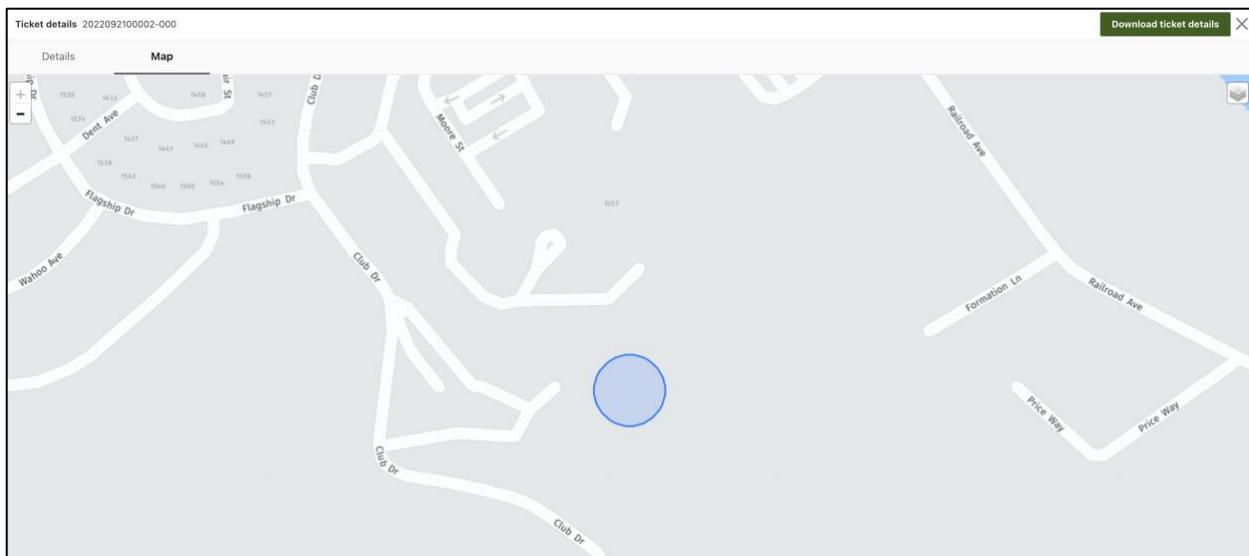
Assign response code

---

### History

**No response codes have been assigned to this ticket yet.**  
Once a response code is assigned, it will be displayed here.

You can scroll down on the left side to see all of the ticket related fields or click the green **Additional details** button to view the dig site polygon which will open in another window:



Once you have reviewed the dig site polygon, close the additional window and then select the appropriate response code from the drop down response code box:

[Additional details](#) ✕

## Response code status

**UNASSIGNED**

Response code  
-- Select one --

- 001 - Clear - no conflict
- 002 - Clear - no conflict but privately owned utility on property - contact private utility owner for locate
- 003 - Existing markings adequate
- 004 - No markings requested
- 010 - Locate area marked
- 011 - Locate area marked but abandoned facilities may be in the area
- 012 - Locate area marked up to private owned utility - contact private utility owner for locate

Once a response code is assigned, it will be displayed here.

Add a note to the ticket (notes are required) and click on the green **Assign response code** button to close out the ticket:

[Additional details](#) ✕

## Response code status

**UNASSIGNED**

Response code  
001 - Clear - no conflict

Notes  
Clear

Show these notes when a contractor views this ticket in PositiveResponse

[Assign response code](#)

You can also assign a response code by selecting the relevant ticket(s) and then clicking on the **Assign response code** button in the top right corner:

Operations > **Positive Response** Nick's Test Compa ✕ 🔍

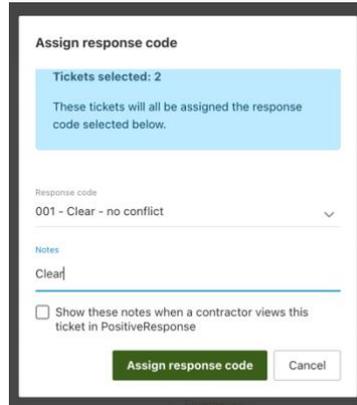
SYSTEM OPERATOR MSNICK, USAN 811 - CALIFORNIA

Stations  
NICKTEST - Nick's Test Company A

Response code: 🔍 Unassigned    Search by: ▼ Due by date    Start date: ▼ Select a date    End date: ▼ Select a date    [Assign response code](#)

<input type="checkbox"/>	Due by	Response code	Ticket type	Ticket no.	Work location
<input checked="" type="checkbox"/>	Sep 23, 2022, 05:01:00 PM	Unassigned	Normal	2022092100002-000	1750 Club Dr Vallejo California 94592
<input checked="" type="checkbox"/>	Sep 23, 2022, 05:01:00 PM	Unassigned	Normal	2022092100001-000	1310 Club Dr Vallejo California 94592
<input type="checkbox"/>	Sep 23, 2022, 05:01:00 PM	Unassigned	Normal	2022092100003-000	1310 Club Dr Vallejo California 94592

A popup will appear to allow you to choose the appropriate response code along with the required notes:



**Assign response code**

Tickets selected: 2

These tickets will all be assigned the response code selected below.

Response code  
001 - Clear - no conflict

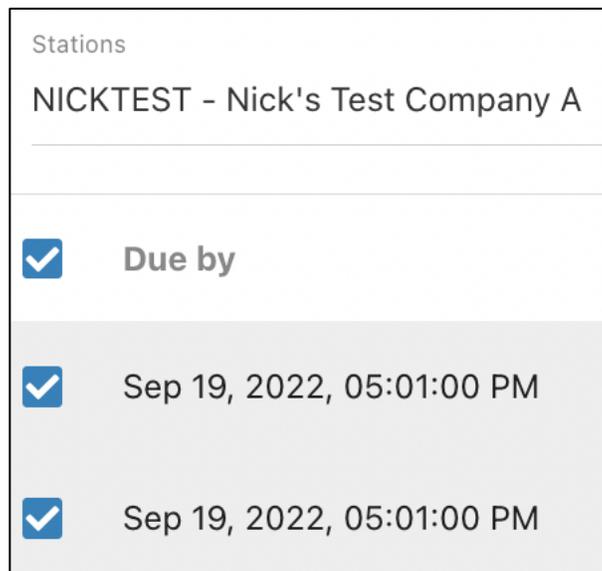
Notes  
Clear

Show these notes when a contractor views this ticket in PositiveResponse

Assign response code Cancel

Once you have selected the correct response code, click the green **Assign response code** button. The ticket will disappear from the unassigned table and appear in the relevant response code list. You can double-check this by filtering by the response code to see if it appears correctly in that list.

If you have multiple tickets to update, you can Select all by clicking the box to the left of the 'Due by' title in the first column to save time:



Stations	
NICKTEST - Nick's Test Company A	
<input checked="" type="checkbox"/>	Due by
<input checked="" type="checkbox"/>	Sep 19, 2022, 05:01:00 PM
<input checked="" type="checkbox"/>	Sep 19, 2022, 05:01:00 PM

This will select all the tickets in the table. Click the green **Assign response code** button and choose the desired code, then click the green **Assign response code** again:



Once you have entered the correct criteria, hit the magnifying glass at the top right-hand corner to search for tickets. Any tickets found based off of your search criteria will populate:

Operations > OneCallAccess							
MEMBERREP CAMEMBERREP, NICK'S TEST COMPA							
List	Map					Export	Advanced search
Ticket type	Ticket no.	Address	Type of work	Start date	Caller name		
Normal	2022091500021-000	1310 Club Dr Vallejo California 94592	Utilities - Distribution	Sep 19, 2022, 05:01:00 PM	Nick White		
Normal	2022091500020-000	1080 Azuar Drive Vallejo California ...	Residential property work	Sep 19, 2022, 05:01:00 PM	Caleb Woods		
Normal	2022091500019-000	1080 Azuar Drive Vallejo California ...	Residential property work	Sep 19, 2022, 05:01:00 PM	Caleb Woods		
Normal	2022091500018-000	1080 Azuar Drive Vallejo California ...	Residential property work	Sep 19, 2022, 05:01:00 PM	Caleb Woods		
Normal	2022091500017-000	1080 Azuar Drive Vallejo California ...	Residential property work	Sep 19, 2022, 05:01:00 PM	Caleb Woods		
Normal	2022090800011-001	1080 Azuar Drive Vallejo California ...	Residential property work	Sep 12, 2022, 05:01:00 PM	Caleb Woods		
Normal	2022090800011-000	1080 Azuar Drive Vallejo California ...	Residential property work	Sep 12, 2022, 05:01:00 PM	Caleb Woods		

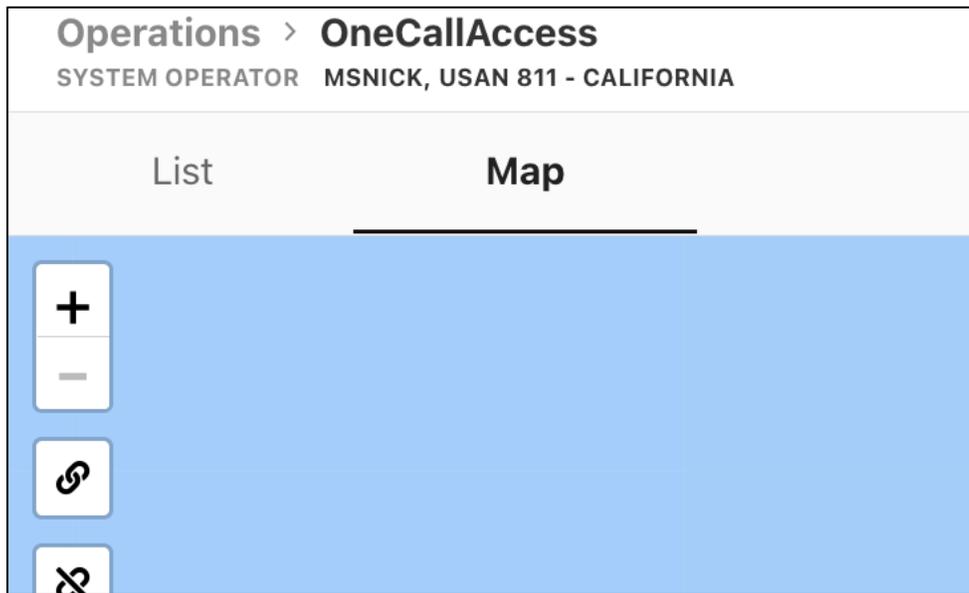
Once you have populated the tickets, you can hit the green **Export** button to download a report of those tickets to your computer as a csv file. Additionally, you can click on the ticket row to view the full ticket details along with the dig-site polygon:

Ticket details 2022091500017-000					Download ticket details	
Details		Map				
Nick's Test Company A NICKTEST Phone: 9252226501 Emergency phone: 9252226501					Expand all	Collapse all
<b>Caller details</b>						
Caller ID	Contact	Company	Full address	Mobile		
51	Caleb Woods	--Not Listed--	4005 Port Chicago Hwy Concord Cor	503-310-5267		
Phone	Fax	Email				
305-310-5267		caleb.woods@usan.org				
<b>Enquiry details</b>						
User reference	Working on behalf of authority	Priority	Medium	Nearest Cross street		
	Homeowner/Property Owner/Tenant?	Normal	Web	Rickover St		
Excavator Doing Work	Excavation Method	Is the area pre-marked?	Created date	Start date		
	Hand digging	No	Thu, Sep 15, 2022, 02:48:56 PM	Mon, Sep 19, 2022, 05:01:00 PM		
Full address	Ticket type	Type of work	Activity	Work location		
1080 Azuar Drive Vallejo California 94	Normal	Residential property work	Yard - Deck/Mailbox/Playground/Pole,			
Location in road	Depth	Onsite Contact Name	Onsite Contact Number	Lot		
		Caleb	1234567890			

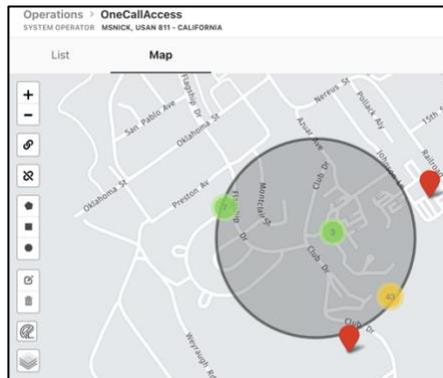
## 5.2 Map

Map allows you to draw a polygon on a map that will populate any tickets that fall within the drawn polygon.

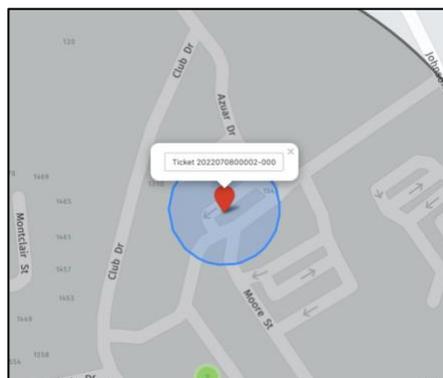
Click on the Map tab at the top of the screen to display the map:



Once the map is displayed, you can zoom in to the area you want to search for tickets and then use the mapping tools on the left side of the map to draw your search polygon:



This will display any tickets you have received for your membership inside or near the drawn polygon. Clicking on one of the individual tickets will display the ticket number:



To view the full ticket details click on the ticket number which will pop open the ticket details page:

**Ticket details** 2022070800002 Download ticket details

**Details** | Map

Expand all | Collapse all

California North State Authoritys CNSA Phone: 8006422444 Emergency phone: 8006422445
Comcast COMNCA Phone: 3233425552 Emergency phone: 8888248219
Nick's Test Company A NICKTEST Phone: 9252226501 Emergency phone: 9252226501
Pacific Bell PACBEL Phone: 5106452929 Emergency phone: 5106452929

**Caller details**

Caller ID 171	Contact Nick White	Company	Full address 40 Pippo Pl 40 Pippo Pl Brentwood B	Mobile
Phone 9257688561	Fax	Email nick.white@usanorth811.org		

**Enquiry details**

User reference fdsfd	Working on behalf of authority City of Anderson	Priority Normal	Medium Web	Nearest Cross street Club dr
Excavator Doing Work	Excavation Method Bulldozer/loader	Is the area pre-marked? No	Created date Fri, Jul 8, 2022, 08:39:57 AM	Start date Fri, Jul 8, 2022, 08:37:00 AM

Click on the X icon in the top right hand corner of the screen to close the ticket details page and you will be returned to the map view. To view the ticket you have found within your polygon in a list, click on the **List** tab:

Operations > **OneCallAccess**  
SYSTEM OPERATOR: MENICK, USAN 811 - CALIFORNIA

**List** | Map Export | Advanced search

Ticket type	Ticket no.	Address	Type of work	Start date	Caller name
Normal	2022092100003-000	1310 Club Dr Vallejo California 94592	Utilities - Distribution	Sep 23, 2022, 05:01:00 PM	Nick White
Normal	2022092100002-000	1750 Club Dr Vallejo California 94592	Utilities - Distribution	Sep 23, 2022, 05:01:00 PM	Nick White
Normal	2022092100001-000	1310 Club Dr Vallejo California 94592	Utilities - Distribution	Sep 23, 2022, 05:01:00 PM	Nick White
Normal	2022092000014-000	1310 Club Dr Vallejo California 94592	Utilities - Distribution	Sep 22, 2022, 05:01:00 PM	Nick White

From here you can download the full list of tickets as a csv file by clicking on the green **Export** button in the top right-hand corner.

## 6. Settings

### 6.1 System

Navigation: Settings>System

Under **System**, you can manage your **Company Details & Internal users**.

To view your company details, go to Settings > System.

Settings > System  
MEMBERREP CAMEMBERREP, NICK'S TEST COMPA

Company Details Internal users

### Company Details

Company name	Email	Phone
Nick's Test Compa	nick.white@usan.org	(925) 222 - 6501

**Postal address**

Full address  
4005 Port Chicago Hwy Concord California 94513

**Physical address**

Full address  
4005 Port Chicago Hwy Concord California 94513

Clicking on the pencil icon in the top right-hand corner will allow you to update this information.

**Note: Although you will have access to update your Company Name, DO NOT CHANGE THIS. If you need to update your Company Name, please reach out to [memberservices@usan.org](mailto:memberservices@usan.org) to make that change.**

Once you are done updating all your Companies Details (except for Company name) click on the disc icon in the top right-hand corner to save your changes.

You can also see all the Internal Users (depending on your user Role) created for your company by clicking on the **Internal Users** tab:

Settings > System  
MEMBERREP CAMEMBERREP, NICK'S TEST COMPA

Company Details Internal users

Status Search by user name

Active

New user

Here you can search for users through the search bar at the top. If you wish to view or edit a user from your company, click anywhere on their row in the table. This will bring up the user's **Account details**:

**Company user profile** [edit icon] [close icon]

### Account details

Name: Nick White      User name: nick.white@usan.org

Company: Nick's Test Compa

Role: -- Select one --

Status:  ACTIVE  INACTIVE

Password: .....

Multi-factor authentication:  ACTIVE  INACTIVE

### Contact info

Email: nick.white@usan.org

Phone: (925) 768 - 856 [help icon]      Alternative phone (optional): [help icon]      Fax (optional): [help icon]

**Postal address**

Full address: 40 Pippo Pl Brentwood California 94513

**Physical address**

Full address: 40 Pippo Pl Brentwood California 94513

You can edit these by clicking on the edit pen icon in the top right-hand corner. Depending on your user Role, you can change various settings for each user. To reset the password for another user from your company, click on the **Send password reset** button next to the password field in their **Account Details**:

Password: .....

This will send the user an email with a link to reset their password.

When you have finished editing, click the disc icon in the same place to save your changes.

**Note: Please DO NOT create a new user by clicking on the **New user** button:**



If you need additional users added, then they will need to create their account in One Call Access first and then promoted to the correct membership by the Member Services Department ([memberservices@usan.org](mailto:memberservices@usan.org)). Pelican uses a single sign-on system that will allow you to have one user account for both programs (Damage Prevention Portal & One Call Access) but the new user MUST be created in One Call Access first.

## 6.2 Delegations

Delegations allow you as the membered utility operator to offer another company the ability to respond to your tickets and or manage your membership on your behalf. This usually involves a contract locating company or a ticket management system vendor. Please reach out to the Member Services department ([memberservices@usan.org](mailto:memberservices@usan.org)) for assistance with this.

## 6.3 One Call Access

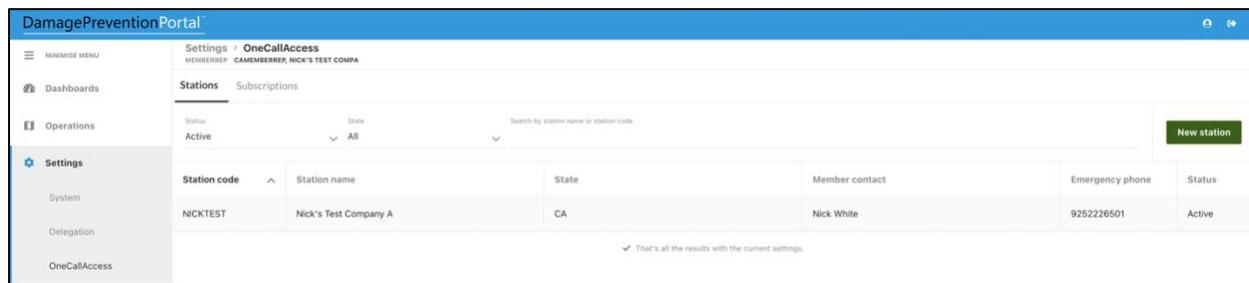
Navigation: Settings>OneCallAccess

One Call Access gives you access to manage your Station codes, AOI's & Subscriptions.

**Note: OneCallAccess within DPP is different than the program used for submitting tickets online also called OneCALLAccess. We are aware that this can cause confusion and are looking at getting it changed.**

### 6.3.1 Stations

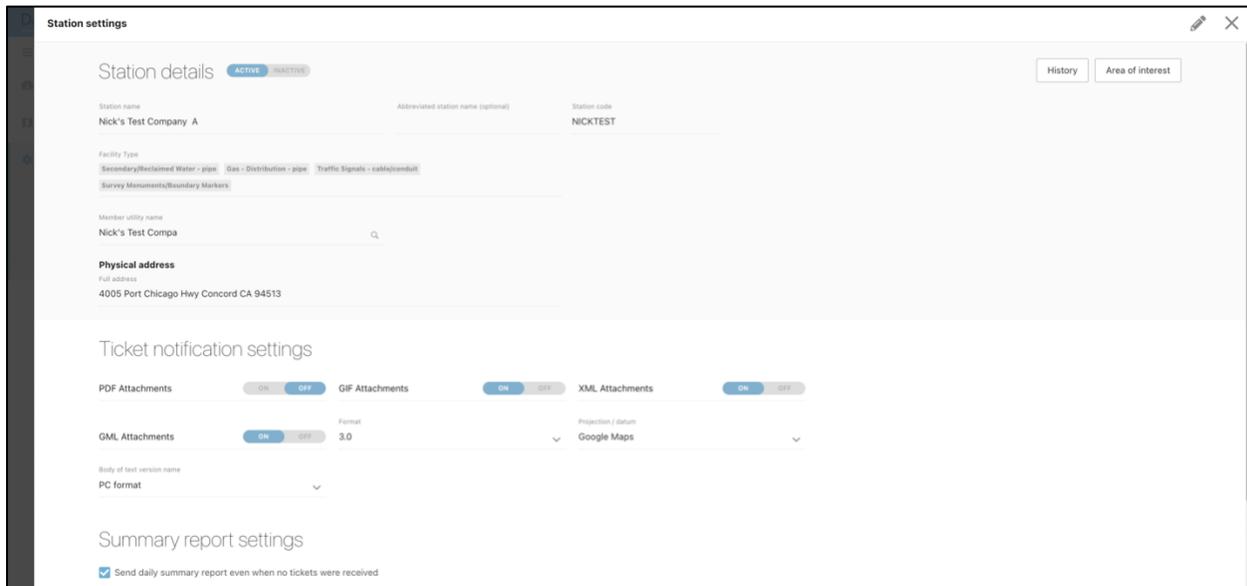
The default view for One Call Access will show you all of your active Stations:



The screenshot shows the 'DamagePreventionPortal' interface. The top navigation bar includes 'Settings' and 'OneCallAccess'. Below the navigation, there are tabs for 'Stations' and 'Subscriptions'. The 'Stations' tab is active, displaying a table with columns for Station code, Station name, State, Member contact, Emergency phone, and Status. A 'New station' button is visible in the top right corner of the table area. The table contains one entry: NICKTEST, Nick's Test Company A, CA, Nick White, 9252226501, Active.

Station code	Station name	State	Member contact	Emergency phone	Status
NICKTEST	Nick's Test Company A	CA	Nick White	9252226501	Active

You can filter your station codes based off of Status (active or inactive), State (only CA or only NV), or the Station name or Station code. Clicking on a station code will take you into Station settings:

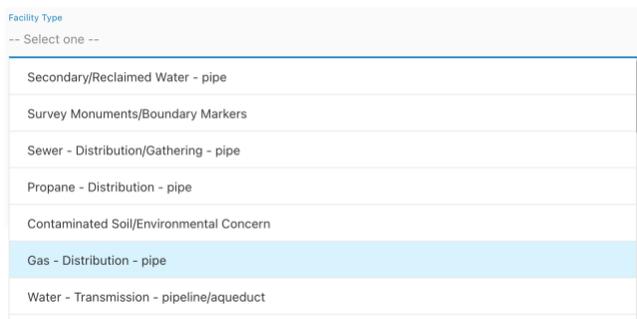


Here you can view this specific station codes details, Ticket notification settings, Summary report settings & Contacts. Clicking on the pencil icon at the top right-hand corner of the page allows you to edit some of this information.

**Note: Please do not edit the Station name or Member Utility name fields. If you would like this updated, then please reach out to the Member Services Department at [memberservices@usan.org](mailto:memberservices@usan.org).**

### 6.3.2 Facility Type

Select the correct facility type for this station code by clicking on the 'Select one' drop down box:



This will display a drop-down menu of all facility types for you to select.

Note: Some members have one station code per facility type so keep that in mind when selecting an individual station codes Facility Type. One station code may cover multiple facility types, or one station code may only cover a single facility type.

### 6.3.3 Ticket notification settings

This will allow you to customize the format of how you receive your tickets for this specific station code.

Note: this will only change the specific station code delivery format, not any other station codes you may have. You will have to do this same process for each station code if you have more than one.

If you receive your tickets via email and don't use a ticket management system of any kind, then you most likely will want to receive the **PDF Attachment** only. If you have a ticket management system or work with a contract locating company then you probably will be using the GIF, GML, XML attachments.

**PDF** – A PDF copy of the dig ticket that is easily read. Members that don't use a ticket management system and receive their tickets via email will only need this attachment turned on.

**GIF** – This is a static image of the dig-site polygon.

**XML** – A body of text that is used for parsing into a ticket management system.

**GML** – A spatial file to be opened within any GIS software

Note: Not having the correct ticket format set could keep your system from receiving tickets. Please consult with your vendor to confirm the correct ticket format has been set for your Subscription.

**Body of text version name (CA only)** – This will allow you to select Legacy format or PC format. Legacy format is a similar format to our former ticketing system but will be missing some information as the Pelican format has fields we previously didn't have in the Newtin system.

Note: Selecting the Legacy format means you will not receive all of the Pelican ticket data including Previous ticket number (if applicable), Work duration, Subdivision/Lot, Work type, Anticipated depth.

The Legacy & PC Format is only selectable if PDF attachments is turned off. Selecting PC Format will provide you with a plain text version of the ticket in the body of the email along with any additional attachments you select.

### 6.3.4 Summary report settings



Summary report settings

Send daily summary report even when no tickets were received

Summary report destination(s) by transmission type

Select all that apply

Add type

This determines if your station code receives Summary reports (previously known as end of day audits) or not. To make any changes to your Summary report settings, click on the pencil icon in the top right-hand corner of the screen.

You can choose to receive Summary reports even if no tickets were received by checking the box next to 'Send daily summary reports even when no tickets were received'. If this box is unchecked, then you will only receive a Summary report for the days when at least 1 ticket is received for your station code.

If you already have a transmission type set-up, then click in the field labeled 'Select all that apply' to select your existing transmission email:



Summary report settings

Send daily summary report even when no tickets were received

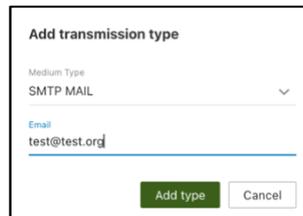
Summary report destination(s) by transmission type

Select all that apply

SMTP MAIL: nick.white@usan.org

Add type

If you don't already have a transmission email set-up, then click on the 'Add type' button to the right to create a new one. The 'Add transmission type' box will pop-up in the middle of the screen for you to select your Medium Type, SMTP MAIL or WEBHOOK. Most members will be using the SMTP MAIL option which delivers your Summary report via an email address.



Add transmission type

Medium Type

SMTP MAIL

Email

test@test.org

Add type Cancel

Once you have completed this, click on the green 'Add type' button to save your transmission type. It will then be populated in the 'Summary report destination(s) by transmission type' field:

### Summary report settings

Send daily summary report even when no tickets were received

Summary report destination(s) by transmission type

test@test.org X

### 6.3.5 Contacts

### Contacts

**Member contact** ⓘ

Full name	Email	Phone	Emergency phone	Fax (optional)
Nick White	nickwhite5532@gmail.com	(925) 222 - 6501	(925) 222 - 6501	

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**Member IT contact** ⓘ

Full name	Email
Nick IT Guy	nick.white@usan.org

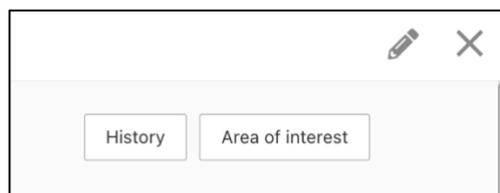
**Member contact:** Is the contact information that will be displayed at the bottom of each excavators dig ticket. This should be a single point of contact that is either familiar with the 811 process or can direct excavators to the proper person to answer their digging related questions.

**Member IT contact:** This contact information is for USAN staff only and will be used to reach out to our members regarding any issues with your station code. This should be a direct email that can reply back quickly in case there is any issues with your station code.

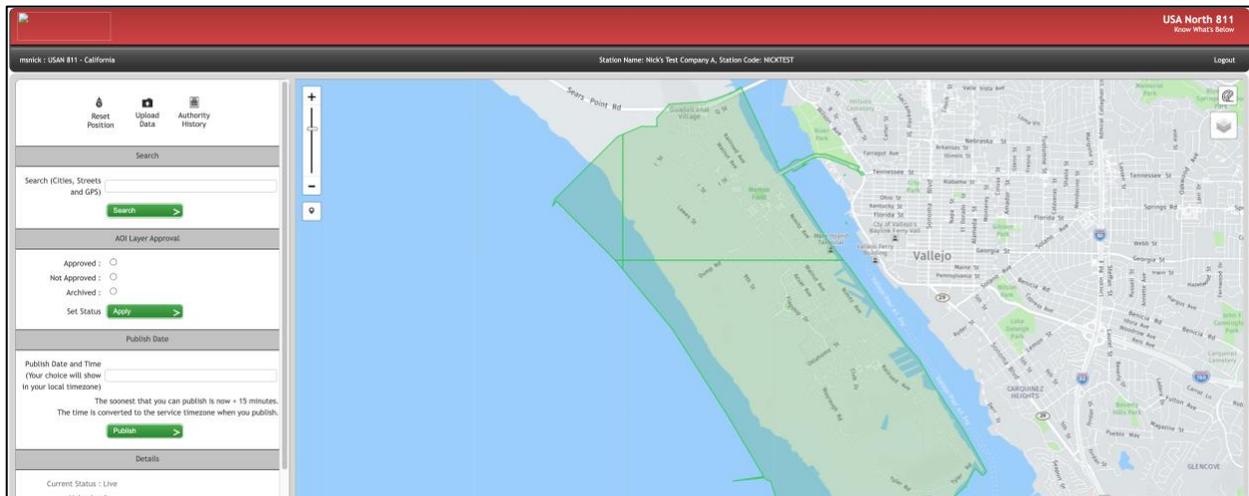
### 6.3.6 Area of interest

Area of interest (AOI) is where you manage your memberships service area and determines what tickets your get notified on.

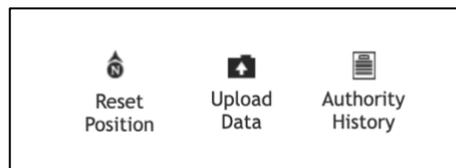
In station details, click on the 'Area of interest' button in the to right corner:



This will open another tab and take you into another program called Authority Viewer. If you have a layer uploaded, then it will be displayed on the map. This sometimes takes a few seconds to load:



### 6.3.7 Updating your AOI

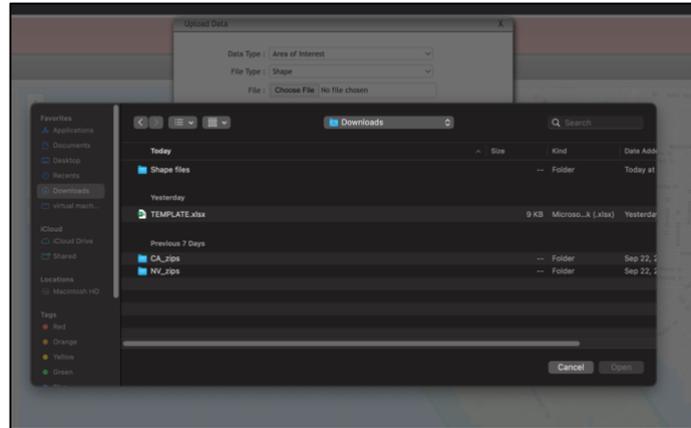


To upload a new shape file set click on the 'Upload Data' button:

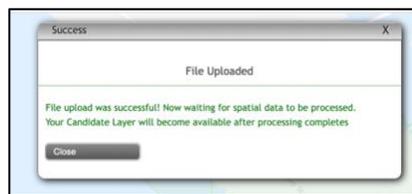
This will pop-up a window in the middle of your screen:



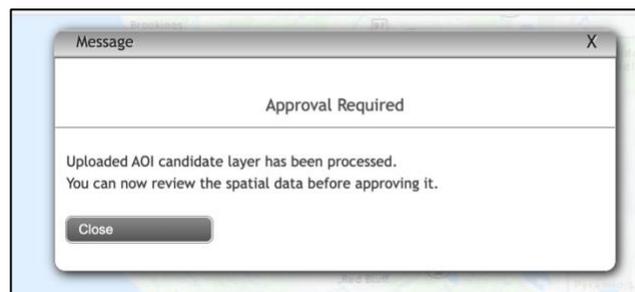
From here, select the correct File Type by clicking on the drop down. Next, click on the 'Choose File' button to select your files from your computer:



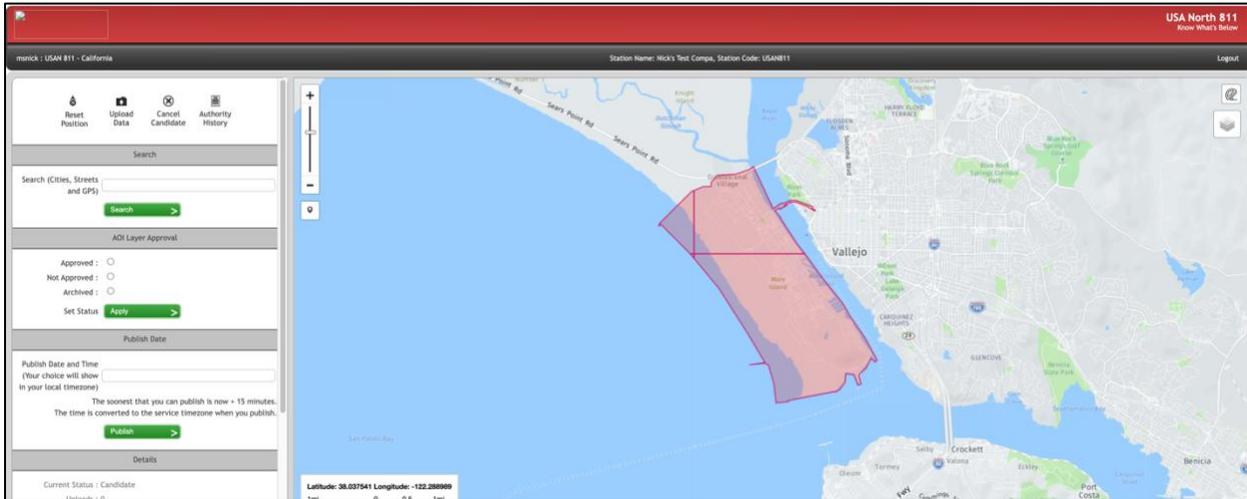
Once you have the correct file selected click on the 'Upload' button. If the file uploads successfully you will get a pop-up box confirming it:



Followed by another pop-up box letting you know the files have processes and are now available for review:

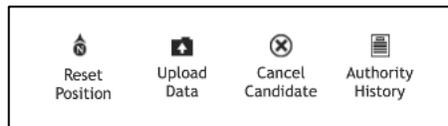


Now that your files have successfully loaded you should now see your AOI displayed as a red Candidate layer on the map:



Note: A Candidate layer must be Approved then Published in order for it to be live in the system.

If you discover that the candidate layer you uploaded is not accurate, click on the 'Cancel Candidate' button:



A pop-up box will appear asking you to confirm the cancellation and to include an optional reason:



Click on the green 'Confirm' button to cancel your candidate layer.

Once you have reviewed the candidate layer and confirmed it is accurate you will need to approve it. On the left side of the screen, check the box next to Approved and then click the green **Apply** button:

**AOI Layer Approval**

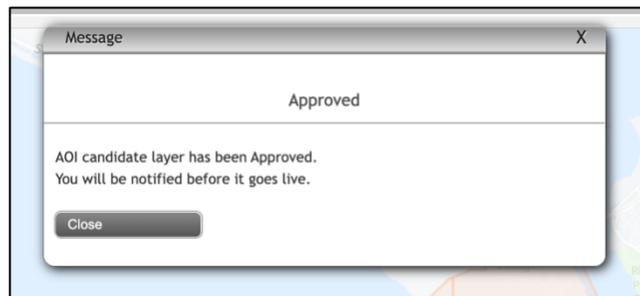
Approved :

Not Approved :

Archived :

Set Status Apply >

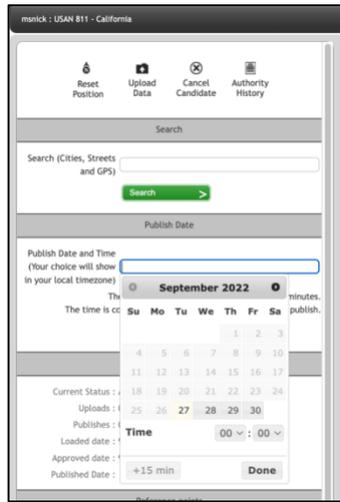
A pop-up box will then confirm your candidate layer has been approved:



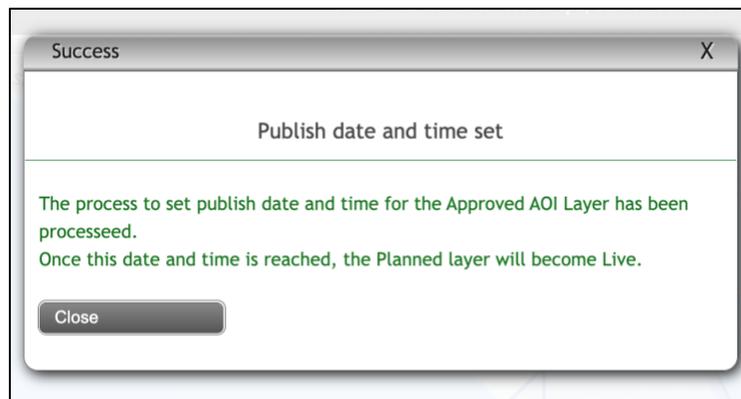
Note: You still need to Publish this layer before it goes live in the system.

Now that the candidate layer has been approved you will see the map layer turn orange and the Details box update to show the approved date:

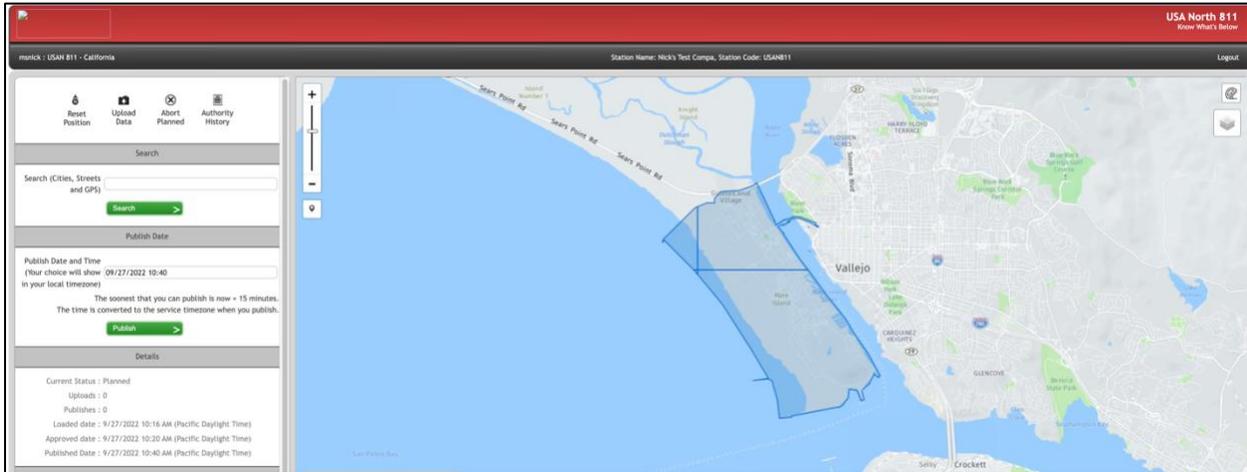
Next you will need to Publish this layer. Click into the 'Publish Date and Time' box to display a calendar:



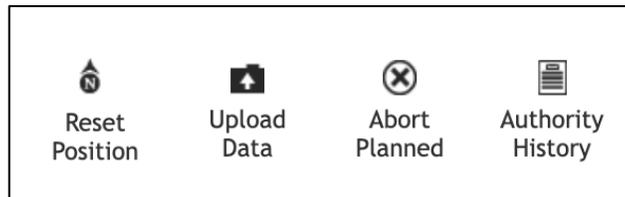
You can either choose a date and time you would like the layer to be published (go live) or select the '+15 min' button to publish the layer within the next 15 minutes. Note: +15 min is the earliest you can publish your layer. Once you have selected the date and time you want your layer to be published, click on the green **Publish** button. This will pop-up a box letting you know the publish date and time have been set:



After this is complete, your map layer will turn blue and you will see the Details box update to show your Published date and time:



Note: 'Current Status' will show as 'Planned' until the publish date and time have passed. If you discover your published layer is not accurate, you can click on the 'Abort Planned' button to cancel the layer.



A confirmation box will pop-up asking you to confirm and to add an optional reason:



Click the green **Confirm** button to complete the cancellation of the published layer.

## 6.4 Subscriptions

Settings > OneCallAccess			
MEMBERREP CAMEMBEREP, NICK'S TEST COMPA			
Stations Subscriptions			
Status	Search by subscription name or station code		<a href="#">New subscription</a> <a href="#">Add subscription rule</a>
Active			
Subscription name	Station code	Transmission type	Status
Caleb's Email	TESTPACBEL, NICKTEST	Email: caleb.woods@usan.org	Active
Caleb's Test Webhook	NICKTEST	Webhook: ("URL": "https://dpp-example.herokuapp...	Active
Custom Resend	NICKTEST	Email: nick.white@usan.org	Active

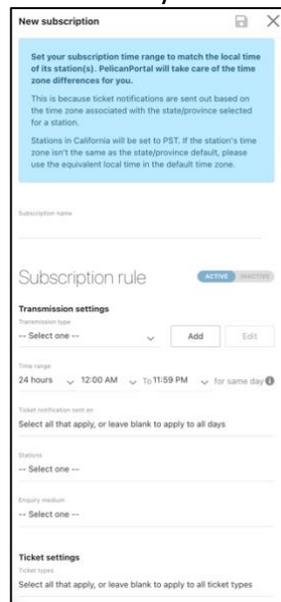
Subscriptions determine where and when your tickets are delivered for each station code based off a set of criteria. You can have one Subscription that applies to multiple station codes or have an individual subscription for each station code. Clicking on the Subscriptions tab at the top of the page will default to all your active Subscriptions.

**Note: Each station code MUST have an active Subscription in order to receive tickets. If your subscription is not set to 24 hours, then you won't receive any tickets outside of your customized Time range. Example: If you choose to have a subscription with a Time range of 8 am to 5 pm, then you won't receive tickets in DPP after 5pm and before 8am. These tickets will have to be resent by PelicanCorp.**

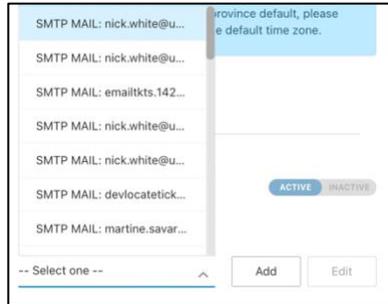
To create a new Subscription, click on the green **New subscription** button in the top right-hand corner:



This will pop open a side menu for you to create your new subscription:

A screenshot of a mobile application form titled "New subscription". The form includes a blue informational box at the top with instructions about time zones. Below this, there is a text input field for "Subscription name". A "Subscription rule" section contains a toggle switch set to "Active". Under "Transmission settings", there is a dropdown menu for "Transmission type" with "Add" and "Edit" buttons. The "Time range" section shows "24 hours" for duration, "12:00 AM" for start time, and "To 11:59 PM" for end time, with a "for same day" icon. The "Ticket notification sent on" section has a dropdown menu. The "Station" section has a dropdown menu. The "Shipping method" section has a dropdown menu. The "Ticket settings" section has a dropdown menu. The form is styled with a light blue background and white text.

Every subscription requires at least a Subscription name & a Transmission type. The Subscription name can be anything you want it to be. If you already have a transmission type, then it will be available to select from the drop-down menu under Transmission type:



To add a new transmission type, click on the **Add** button. This will display a small window in the middle of the screen for you to create a new transmission type:

A dialog box titled "Add transmission type". It has a "Medium Type" dropdown menu set to "SMTP MAIL". Below it is an "Email" field with the text "test@test.org". At the bottom are two buttons: "Add type" (green) and "Cancel".

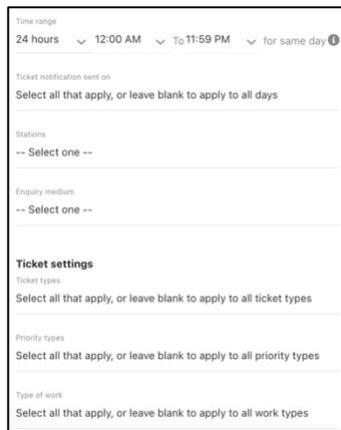
For the Medium Type field, you will have 2 options, SMTP MAIL or WEBHOOKS. Most members will use the SMTP MAIL option which is for delivering via email. If you are using this option, then populate the Email field with the email address where you would like to receive tickets. Once complete, click on the green **Add type** button to save your new transmission type.

If you are using the WEBHOOK option, then you will need to populate the delivery URL with the URL where you want to receive tickets. The Secret key and Custom HTTPS Headers fields are optional:

A dialog box titled "Add transmission type". It has a "Medium Type" dropdown menu set to "WEBHOOK". Below it are three input fields: "HTTPS URL", "Secret key", and "Custom HTTPS Headers". The "Custom HTTPS Headers" field has a checkbox labeled "JSON" which is unchecked. Below these fields is a table with two columns: "Key" and "Value". There is an "Add" button next to the table. At the bottom are two buttons: "Add type" (green) and "Cancel".

Once you are done populating the WEBHOOK transmission type, hit the green **Add type** button to save your transmission.

You can further customize your Subscription by using the Time range, Ticket notification sent on, Stations, Enquiry medium, Ticket types, Priority types, Type of work fields:



The screenshot shows a form for customizing a subscription. It includes the following sections:

- Time range:** 24 hours (dropdown), 12:00 AM (dropdown), To 11:59 PM (dropdown), for same day (info icon).
- Ticket notification sent on:** Select all that apply, or leave blank to apply to all days.
- Stations:** -- Select one --
- Enquiry medium:** -- Select one --
- Ticket settings:**
  - Ticket types:** Select all that apply, or leave blank to apply to all ticket types.
  - Priority types:** Select all that apply, or leave blank to apply to all priority types.
  - Type of work:** Select all that apply, or leave blank to apply to all work types.

Again, you must have a 24-hour subscription or overlapping subscriptions so you don't miss any tickets. Not only does this deliver the tickets to you but also determines what tickets are populated into Positive Response.

Once you are done customizing your subscription, click on the disc icon in the top right-hand corner of the screen to save your subscription:



If you already have an existing Subscription, then you can click on the Subscription to view or edit its details.