



CALL BEFORE YOU DIG, INC. CONNECTICUT

DamagePreventionPortal Overview

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Created for use in 2024
Laura Simkus

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Terms Used

Term	Definition
Area of Interest (AOI)	Represents the location(s) of a facility owner/operator's underground facilities and is a layer contained within each station.
AuthorityViewer	Web-based program within DamagePreventionPortal that allows authorized users to view and update an AOI. Updates are completed by replacement file uploads only; no drawing tools.
Contracted Company(ies)	The company, or companies, who have delegated access to third-party company.
DamagePreventionPortal (DPP)	The platform used by members to access and manage their membership; also used by the Call Before You Dig Inc. Member Services.
Delegate Company(ies)	The third-party company, or companies, that access has been delegated to by a facility owner/operator member.
Delegation	The relationship in the system between a facility owner/operator member and a third-party (a.k.a. "agent", "delegate company"); can be set up for access to AuthorityViewer, PosR API, and PC Admin functions such as Positive Response posting, Explore Your Data, and the ability to update station settings and subscriptions.
Explore Your Data	Feature of DamagePreventionPortal that allows authorized users to search and review tickets received; data export available.
Interactive Voice Response (IVR)	Type of subscription offered to members for receipt of emergency tickets only; notification received via automated callout
KML/KMZ File	Keyhole Markup Language is an XML notation for expressing geographic annotation and visualization within two-dimensional maps and three-dimensional Earth browsers. KML was developed for use with Google Earth. A KMZ file is a Zip-compressed .KML file that stores map locations viewable in various geographic information systems (GIS) applications. Can be uploaded into AuthorityViewer.
Layer	A layer contains features (polygons) that represent the AOI of a station.
OneCallAccess (OCA)	Ticket entry platform used to place dig and design tickets; used internally by Notification Center NSRs or by external users. Excavators can use to search tickets placed and check Positive Response.
Pelican/PelicanCorp	PelicanCorp is the creator of the DamagePreventionPortal and OneCallAccess; they are typically referred to as our "vendor.". PelicanCorp operates CBYD's call center.
Positive Response	A program contained within the DamagePreventionPortal that allows members to send digital responses to tickets.
Re-send	The act of resending a ticket already received by a facility owner/operator member or their contract locator; done through DamagePreventionPortal.
SHP File	The shapefile format is a geospatial vector data format for geographic information system software; can be uploaded into AuthorityViewer
Station	Essentially an asset on the DamagePreventionPortal under a membership; stations are most often per separate facility type but some members use stations to break up a single-facility-type-asset into regions; only one facility type can be applied to a station; contains ticket notification settings, Summary Report settings, contact information, and area of interest. Each station is assigned a unique identifier called a "station code."

Station Code	A unique identifier assigned to each station; should follow standard naming procedure to summarize company name and facility type.
Subscription	One of the possibly many deliveries to a member based on ticket criteria and destination; applied to station(s); can be email, IVR, or webhook.
Summary Report	Provides summary of tickets received per station per day; can be empty; sent automatically by the system if a station includes email addresses under Summary Report Settings. Also known as a “Goodnight Summary”.
Ticket	A communication from CBYD to a facility owner/operator or their third party requesting the marking of underground facilities, based on information provided by an excavator in a dig notice.
Ticket Management System (TMS)	Software often used by members for management of CBYD tickets received; provides a range of functionality and features, including automated ticket screening, routing and dispatching, automated Positive Response (via PosR API), accurate geo-location mapping, document and image attachments, mobile optimization, customizable workflows, reporting and more. It also offers integration with internal and external systems.
Transmission	A transmission is a delivery of a single ticket and revision number combination through a unique subscription
User Account	Account associated with each membership that allows authorized users to access and manage membership through the DamagePreventionPortal; starts in OneCallAccess.
Work Polygon	The polygon drawn by a CBYD customer service agent or external user on each ticket placed depicting the work/dig location; the work polygon is intended as virtual white lining

General

DamagePreventionPortal is the platform created by PelicanCorp that enables facility owner/operator members and their third-party contractors to maintain their Call Before You Dig, Inc responsibilities as required by Section 16-345 Connecticut state statutes. Users can log into their account to post to Positive Response, review station contact and subscription information, update the area of interest (AOI) for each station, and access tickets. DamagePreventionPortal is web-based and requires no download. This document is an overview of the platform

Get Started

User Accounts

DamagePreventionPortal access is an “upgrade” to a OneCallAccess account so that the same login credentials to be used on both platforms.

OneCallAccess is the ticket entry platform for placing tickets, searching tickets placed, and checking Positive Response on tickets placed. DamagePreventionPortal is for viewing and responding to tickets received, among other asset maintenance features; tickets cannot be placed through DamagePreventionPortal. User accounts on both platforms are intended to be specific to an individual.

If a user already has a OneCallAccess account, please contact our call center to have the account added to the DamagePreventionPortal

New Users

New users must establish a OneCallAccess account first at www.cbyd.com

Account registration emails will be sent from callcenter@cbyd.com . New users will receive the following, or similar, registration email to complete their account set-up:

CALL BEFORE YOU DIG - New User Registration

Call 1-800-922-4455 or 811

www.cbyd.com

09/09/2024

Dear Mr Your Name Here

Thank you for registering with the Call Before You Dig service.

With your Username below, you now have access to our e-ticket service.

Before you can lodge an e-ticket you need to confirm you have received this email correctly. You can do this by clicking on the following link and confirming your account.

Validate your email address.

To lodge a Call Before You Dig e-ticket please visit our online service at www.cbyd.com

click on the link to request utility mark outs and follow the prompts.

User ID: 00000

Username: your.username.here

After logging in, we recommend changing your login details to something you can remember. To do this, click on Account button at any time after you log in.

Please refer to the Call Before You Dig guidelines for more details on our service, safe excavation and how to ensure you lodge your Call Before You Dig ticket correctly; view guidelines

All users of this service acknowledge and agree that they have read and understood the terms and disclaimers on which this service is provided, which is set out at www.cbyd.com

Account Types

There are several different account types or “Roles” within DPP. Please contact CBYD’s Member Services for more information, and provide insight regarding what you need to have access to- and we will determine the appropriate user account type depending on those needs.

Some of the user roles are:

Service Operator - Includes most all Read & Write permissions (OneCall,Operations,Settings,Delegations, AuthorityViewer +more)

Service Owner - Includes most of the same features as Service Operator except access to Delegations.

User - Basic user with limited access and available features are primarily Read-Only

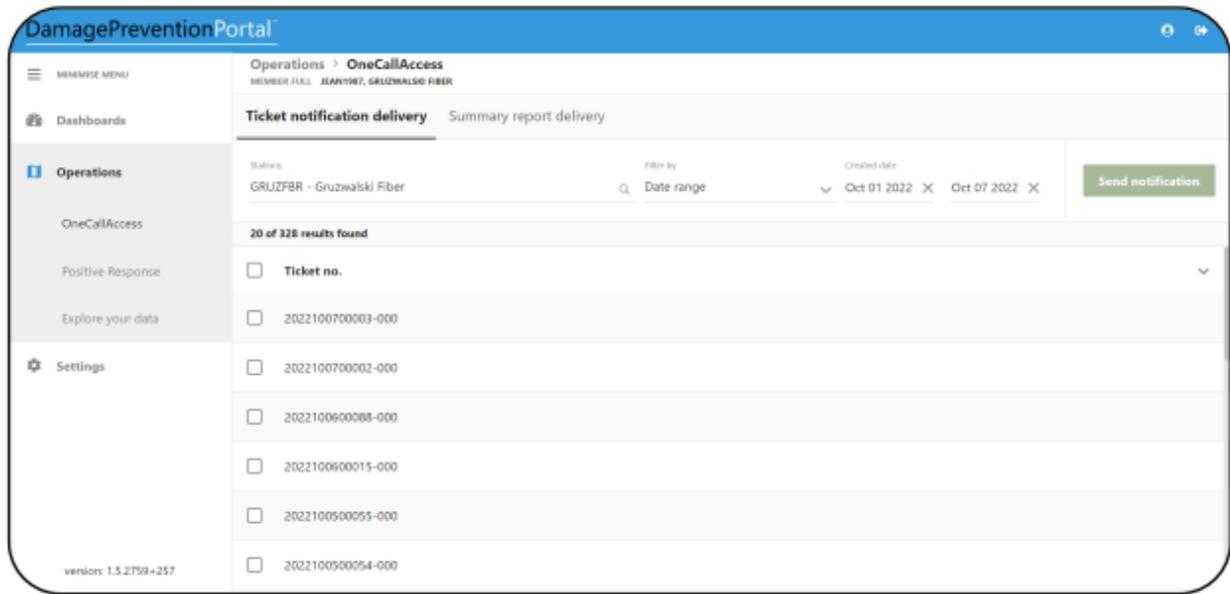
Data Explorer - Read only for Operations, Read & Write for Explore Your Data. Primarily used for individuals who need to research tickets for damage or auditing purposes only.

Member Admin -Read-Only Permissions to access AuthorityViewer and Delegations, but Read/Write access to Operations.

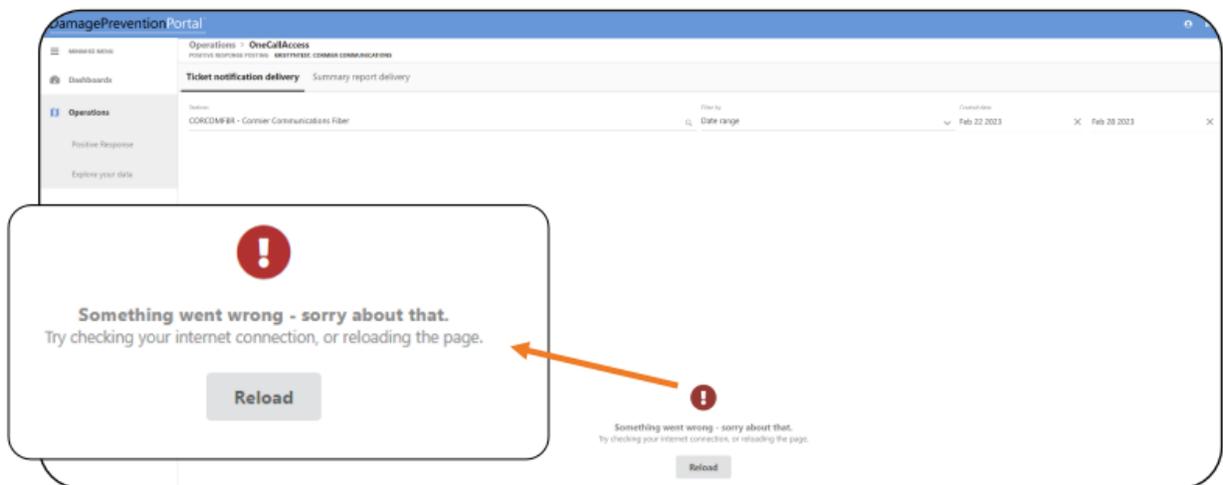
Inside the Platform

Default View

Upon successful login, you will see the default view of the Operations menu on the OneCallAccess page. This feature allows you to re-send tickets received by stations that are associated with your account. For Member Admin/+ and Member Full/+ user account types, the page will be displayed as shown below.



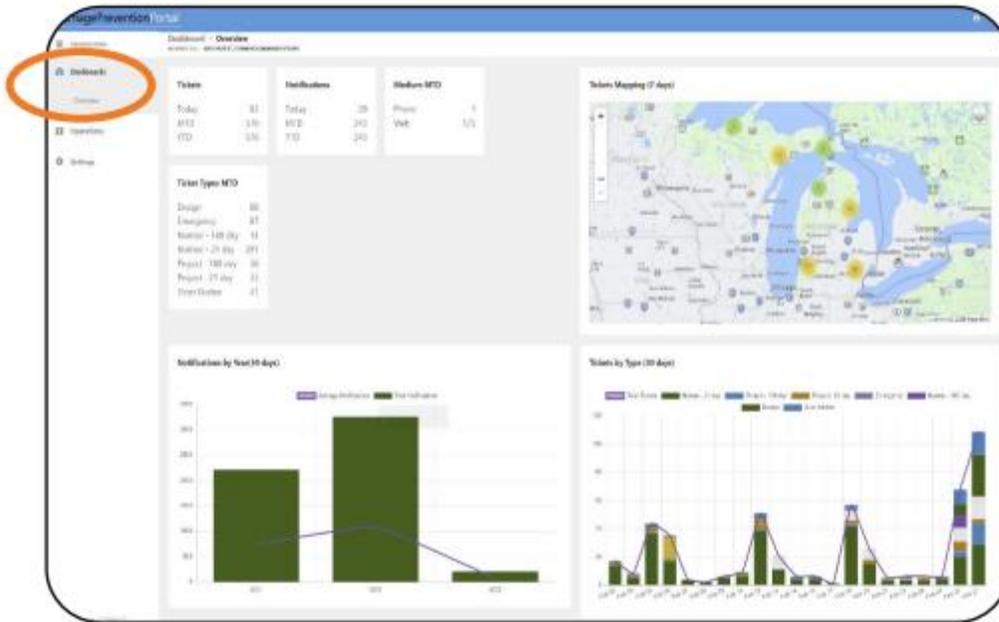
If an account type does not have **Operations:OneCallAccess** enabled, the user will likely see the following screen. This does not mean there is an error with the account; it only means that the default page is inaccessible to you. You will need to click on the menu options that are available.



It is important to remember that your DPP menus and options may look slightly different depending on your user account type.

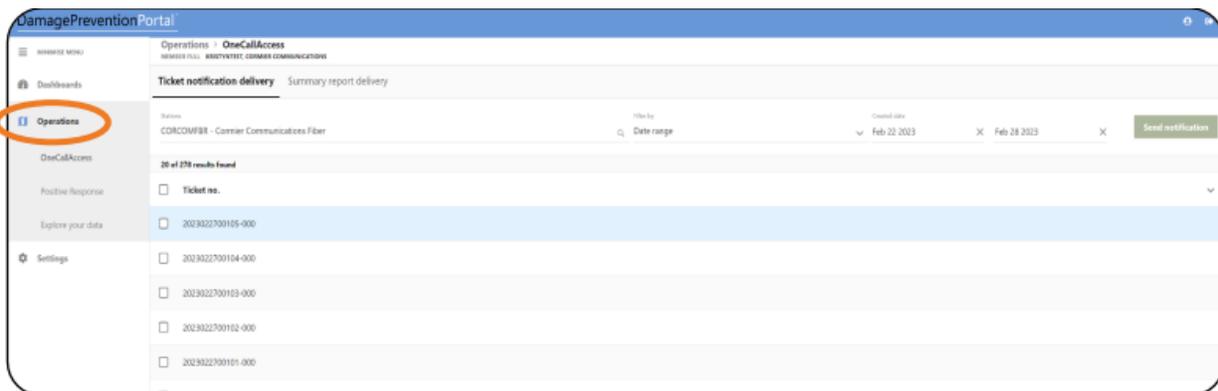
Dashboards Overview

The first menu listed on the sidebar is Dashboards, which currently contains only the Overview page. This provides an overview of the tickets received for the membership the user account is associated with. It does not reflect tickets for stations included via Delegation (i.e., contracted companies). The data here can be used for generic internal reporting needs, but it cannot be exported.



Operations

Operations is the second menu listed on the sidebar.



OneCallAccess

The first option (and the login default view) under the **Operations** menu is **OneCallAccess**. As a reminder, this page is not available to all user account types. As mentioned, this page allows you to re-send copies of tickets received. Tickets can be generated here by station code and filtered by date range, ticket number, or ticket range. This section should not be confused with the OCA ticket entry platform and retransmitting tickets.

Tickets can be re-sent for a variety of reasons to any email address. It is important to remember that tickets will be re-sent in the ticket notification setting (a.k.a. "format") in which they were originally generated. This means that if the station you're re-sending a ticket to originally received that ticket number as a PDF attachment, the re-send will also be of the PDF attachment even if you've changed ticket notification settings since the original ticket was created.

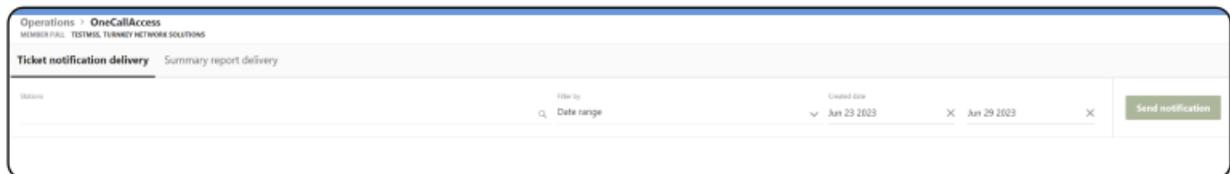
Resending Tickets and Summary Reports

Tickets-

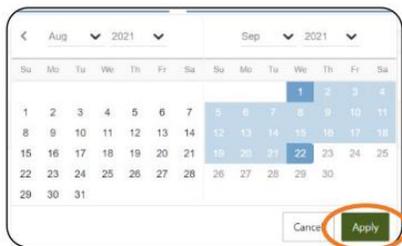
Select the **Ticket Notification Delivery** tab.

In the **Stations** field, select the station code shown to generate a dropdown menu of all other station codes associated with your account.

Under **Filter By**, select your desired choice. In this example, we are filtering by date range.

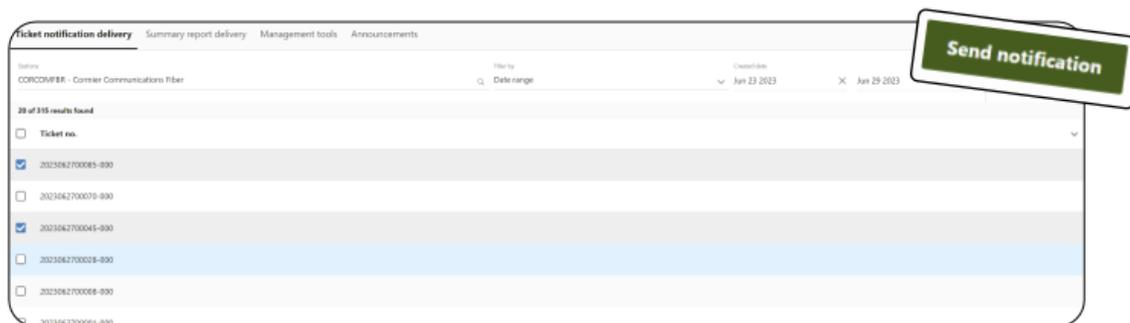


The screenshot shows the 'Ticket notification delivery' interface. At the top, there are tabs for 'Ticket notification delivery' and 'Summary report delivery'. Below the tabs, there are three filter fields: 'Station' (with a dropdown arrow), 'Filter by' (set to 'Date range'), and 'Created date' (with a date range from 'Jun 23 2023' to 'Jun 29 2023'). A green 'Send notification' button is located on the right side of the interface.



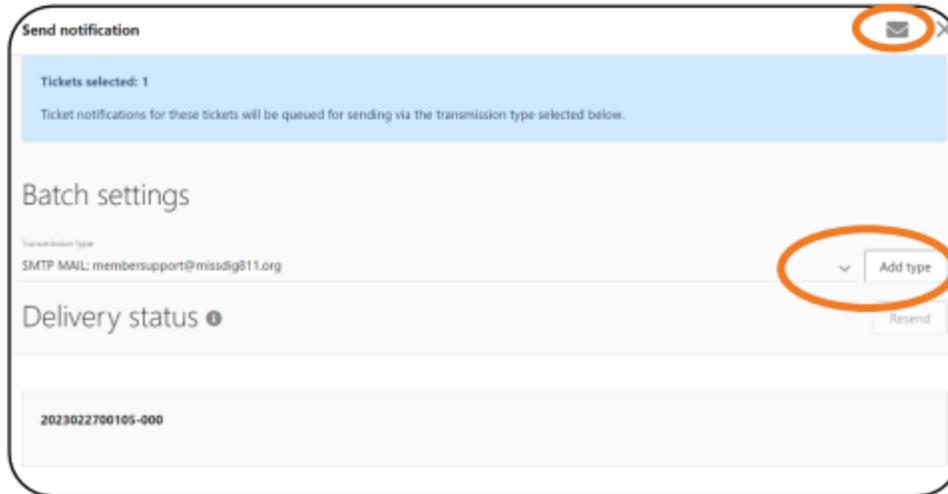
When creating a date range to filter, click on and hold the beginning date and drag the blue highlight to the chosen end date. Then click **Apply**.

From the results generated, select the desired ticket(s) for the re-send and click the green **Send notification** button.



The screenshot shows the 'Ticket notification delivery' interface with a list of tickets. The 'Station' field is set to 'CORCOMFIBER - Corson Communications Fiber'. The 'Filter by' is 'Date range' and the 'Created date' is 'Jun 23 2023' to 'Jun 29 2023'. Below the filters, it says '28 of 315 results found'. The list of tickets includes columns for 'Ticket no.' and checkboxes. Two tickets are selected: '2023042700065-000' and '2023042700045-000'. A green 'Send notification' button is highlighted with a callout box.

You will now be able to choose the transmission type (a.k.a. “subscription” or email address) of the re-send, either from existing subscriptions or by inputting a new one. If you choose an existing subscription from the list, make sure it’s accurate before completing the re-send.



Click the **envelope icon** to complete the re-send process.

Why re-send a ticket?

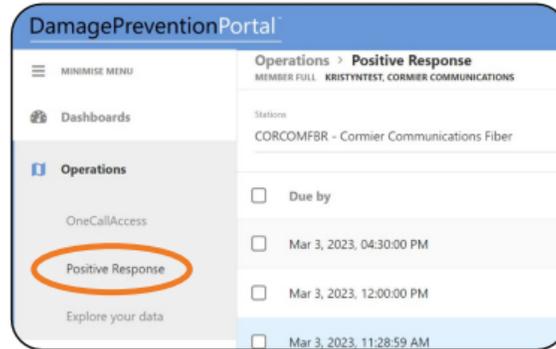
1. The ticket may have been deleted or overlooked by the original recipient.
2. Ticket delivery error or failure may have occurred.
3. The ticket may need to be sent to an additional destination after the fact.
4. Ticket delivery may need to be tested if error has occurred, etc.

PositiveResponse

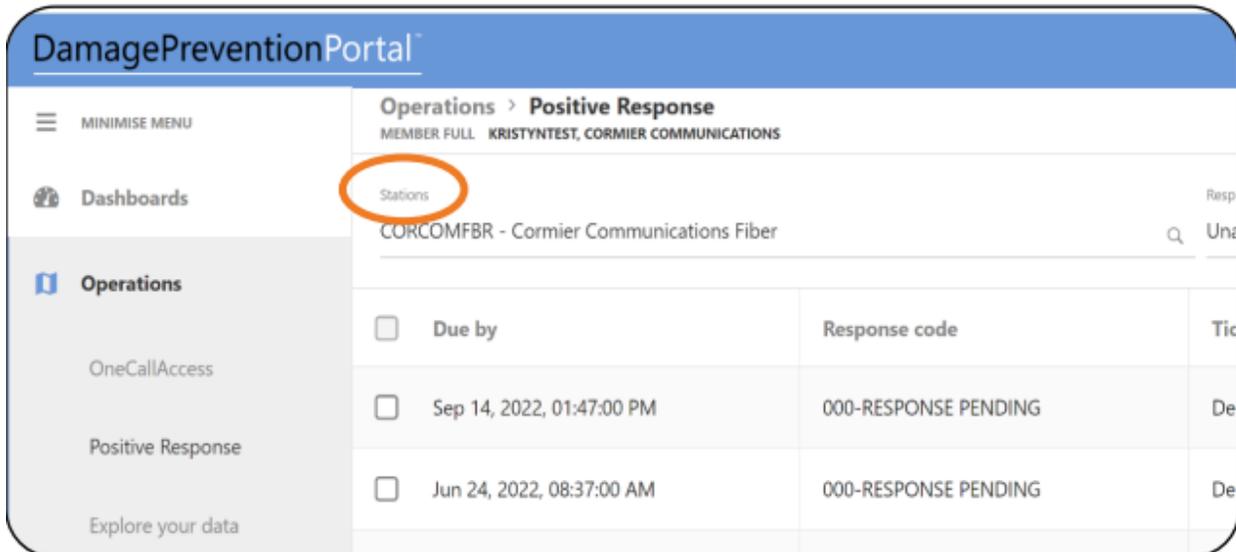
Facility owner/operator members or their contract locators must post for each of their stations on a ticket and must post to all tickets received.

Locating Tickets

Select **Positive Response** under the **Operations** menu. Tickets appear here per station.



By clicking on the **Stations** field, you can select different stations (if available) from the dropdown menu for posting. Note that inactive stations associated with the membership will also appear on this list.



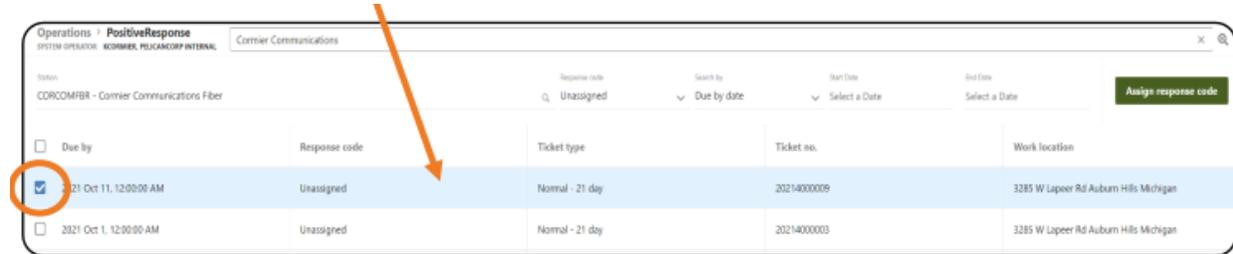
Tickets will be available for reference under **Positive Response** for three years. The **Response Code** dropdown menu has multiple options for filtering tickets.

To view open or past-due dig tickets only, user can filter by "unassigned" from the **Response Code** dropdown menu. Emergency tickets are shown in red text.

Posting Responses

Single Response-

Click on the highlighted row displaying the ticket number you would like to post a response to or select the checkbox beside it.



When a single ticket is selected for posting, you will first see the ticket details and then select the applicable code from the **Response Code** dropdown menu.

Contractor details

Company: PELICANCORP
Contractor name: XCATEUSER NGENPREPROD
Email: aura.simkus@pelicancorp.com
Binary phone number: (203) 248-5502
Mobile number:

Worksite details

Ticket number: 10243700002
Submitted on: 2024 Sep 11, 08:52:05 AM
Ticket type: routine
Due by: 2024 Sep 14, 12:00:00 AM

Response code status

UNASSIGNED

Response code: -- Select one --

Remarks:

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.

Once a selection has been made, you can then input comments into the **Notes** field.

Once the code has been selected and comments entered, click the green **Assign Response Code** button.



Bulk Responses-

You can post to more than one ticket at a time if the same response code and comment are being used. Select the checkboxes for all of the tickets you want to post a response to.

Due by	Response code	Ticket type	Ticket no.	Work location
<input checked="" type="checkbox"/> 2021 Nov 9, 12:00:00 AM	Unassigned	Project - 21 day	2021110400023-000	3285 W Lapeer Rd Auburn Hills
<input checked="" type="checkbox"/> 2021 Nov 9, 12:00:00 AM	Unassigned	Normal - 21 day	2021110400024-000	3285, 3295 W Lapeer Rd Auburn Hills
<input type="checkbox"/> 2021 Nov 9, 12:00:00 AM	Unassigned	Normal - 21 day	2021110400025-000	3671 Waldon Rd Orion Charter Township
<input checked="" type="checkbox"/> 2021 Oct 18, 12:00:00 AM	Unassigned	Normal - 21 day	20214200020	3285 W Lapeer Rd Auburn Hills
<input checked="" type="checkbox"/> 2021 Oct 1, 12:00:00 AM	Unassigned	Normal - 21 day	20214000003	3285 W Lapeer Rd Auburn Hills Michigan

Once the appropriate selections have been made, click the green **Assign Response Code** button near the top right corner.

You will then have the option to select the Positive Response code for all tickets from the **Response Code** dropdown menu.

Once a selection has been made, you can input comments into the **Notes** field.

Reminder:

If you are a third party posting on behalf of multiple facility owner/operator members, be sure that the correct station has been selected prior to completing a post.

Assign response code

Tickets selected: 3
These tickets will all be assigned the response code selected below.

Response code
CODE 1 - Facilities are not in conflict with the excavat... ▾

Remarks
Clear

Show these notes when a contractor views this ticket in PositiveResponse

Assign response code Cancel

Explore Your Data

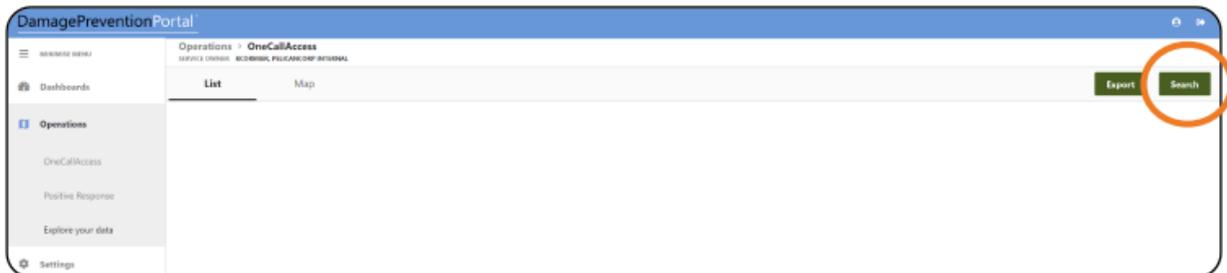
Explore Your Data allows users to search and view tickets delivered to any stations associated with their user account.

Tickets will be searchable here for three years.

Ticket Search

Select **Explore Your Data**, which is the third option under the **Operations** menu.

Tickets will not be visible immediately upon selecting **Explore Your Data**. You will need to click the green **Search** button in the top-right corner.



From here, you can input an array of search criteria to retrieve tickets.

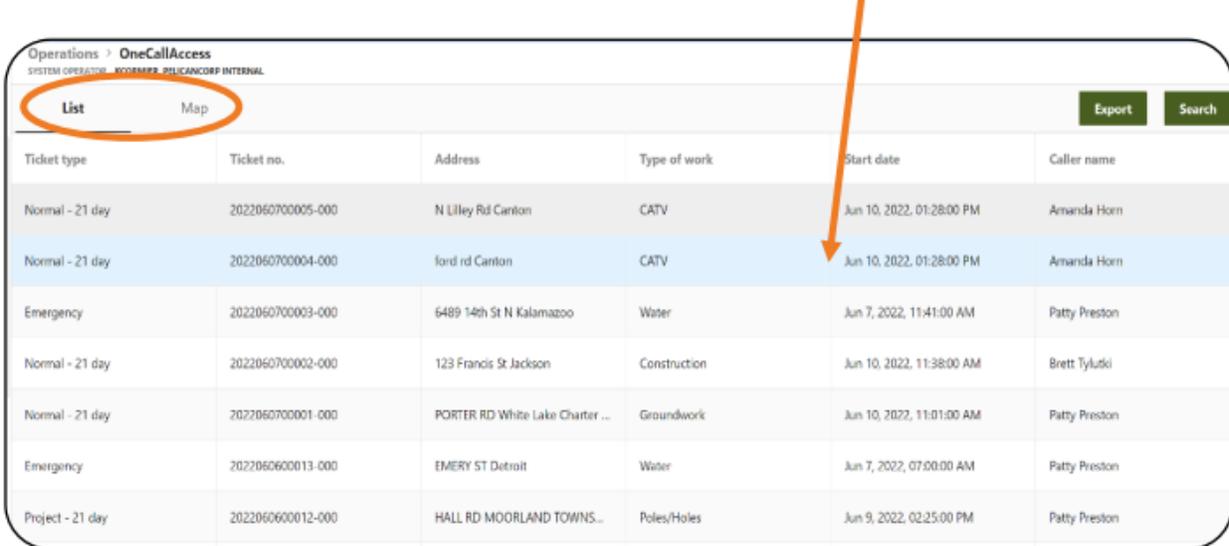
The simplest search would be to select “OneCall” from the **Data Source** menu and click the **magnifying glass icon**. This will bring up all tickets received by the stations associated with the user account

A screenshot of the search form in the DamagePrevention Portal. The form is titled 'Search' and has a magnifying glass icon and a close button in the top right corner. The form contains several input fields with labels and placeholder text: 'Data source' (with 'OneCall' entered), 'Medium' (with 'Press Enter to add this tag.'), 'Ticket type' (with 'Press Enter to add this tag.'), 'Type of work' (with 'Press Enter to add this tag.'), 'Activity' (with 'Press Enter to add this tag.'), 'Working on behalf of' (with a dropdown menu showing '-- Select one --'), 'Working on behalf of utility/authority name' (with a dropdown menu showing '-- Select one --'), 'Request no.', 'Revision Number', 'Station name', and 'Station code'.

Search Results

Once the tickets have populated the screen, you can double-click the highlighted row to open details and the map associated with that ticket.

As a whole, search results can be viewed as a list or interactive map.



Ticket type	Ticket no.	Address	Type of work	Start date	Caller name
Normal - 21 day	2022060700005-000	N Lilley Rd Canton	CATV	Jun 10, 2022, 01:28:00 PM	Amanda Horn
Normal - 21 day	2022060700004-000	ford rd Canton	CATV	Jun 10, 2022, 01:28:00 PM	Amanda Horn
Emergency	2022060700003-000	6489 14th St N Kalamazoo	Water	Jun 7, 2022, 11:41:00 AM	Patty Preston
Normal - 21 day	2022060700002-000	123 Francis St Jackson	Construction	Jun 10, 2022, 11:38:00 AM	Brett Tylutki
Normal - 21 day	2022060700001-000	PORTER RD White Lake Charter ...	Groundwork	Jun 10, 2022, 11:01:00 AM	Patty Preston
Emergency	2022060600013-000	EMERY ST Detroit	Water	Jun 7, 2022, 07:00:00 AM	Patty Preston
Project - 21 day	2022060600012-000	HALL RD MOORLAND TOWNS...	Poles/Holes	Jun 9, 2022, 02:25:00 PM	Patty Preston

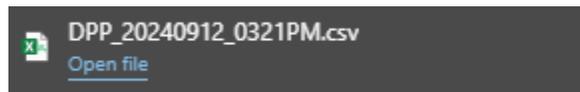
You can export search results by clicking the green **Export** button in the top-right corner.

Exports are limited to 1,000 results at a time, so when searching a high ticket volume or large date range, you may need to break up searches into smaller increments.

The download is a .CSV file.

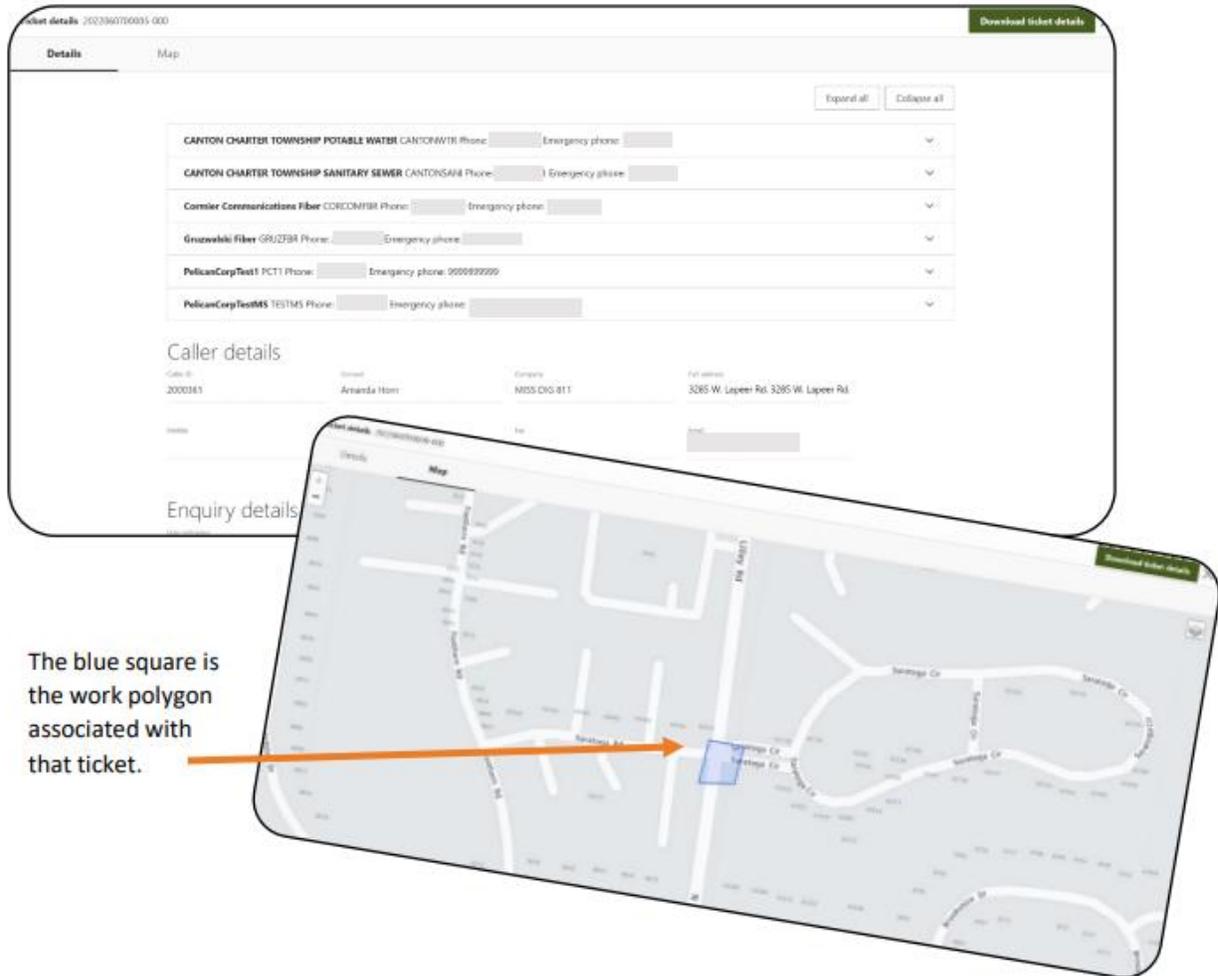
Output columns included are **Ticket Type, Ticket, Address, Type of Work, Start Date, Excavator, Working on Behalf of, Authority Name, Is area pre-marked, and created date.**

The file should appear wherever your web downloads are normally located and can be renamed.



Ticket Details

After double-clicking on the desired ticket, from either the results list or map, you can view the ticket details and map.



The blue square is the work polygon associated with that ticket.

To retrieve a copy of this ticket, click the green **Download Ticket Details** button.

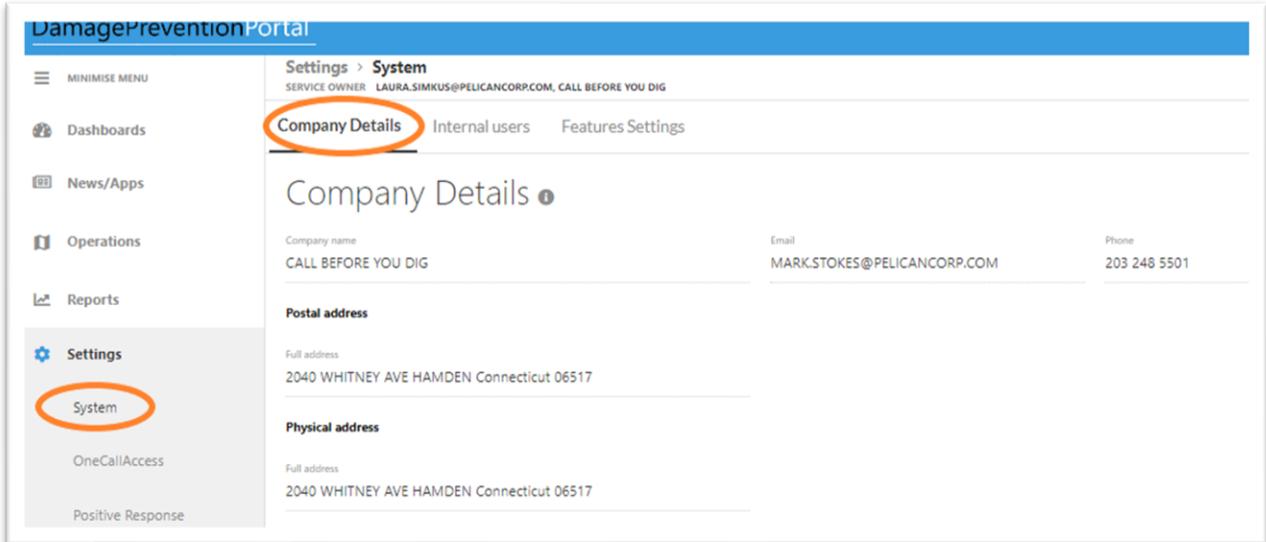
Download ticket details

The file should appear wherever your web downloads are normally located and can be renamed.

Settings

System

The first option under the **Settings** menu is **System**. Only certain user types can view **Settings**.



This allows users to view their **Company Details** as input from their membership paperwork.

The contact information on this page may be for a billing contact but should always, at the very least, contain information for a contact associated with the actual membership and not a third party.

Delegation

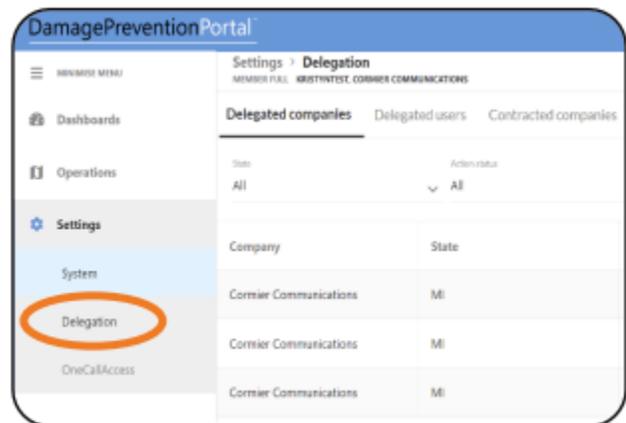
“Delegation” is the term used for the relationship in the system between a facility owner/operator member and third-party contract locator (a.k.a. “agent”, “delegate company”).

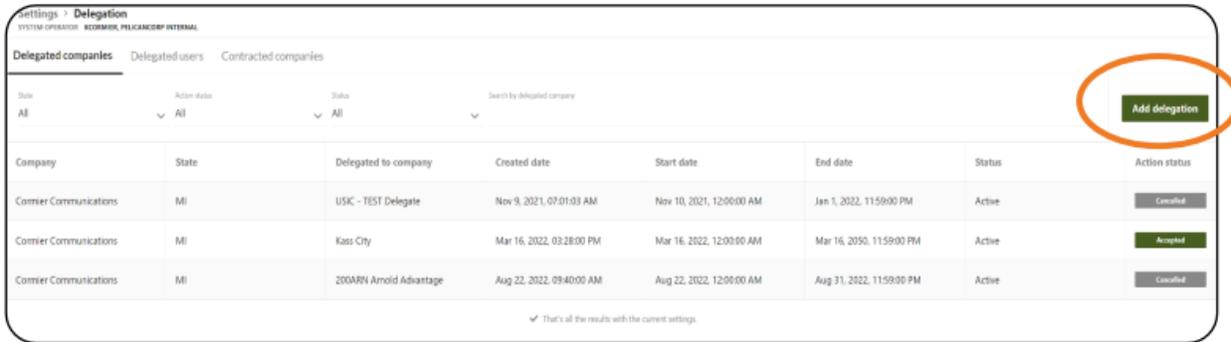
Delegation to a third party can be set up for access to AuthorityViewer, PosR API, and PC Admin functions such as Positive Response posting, Explore Your Data, and the ability to update station settings and subscriptions.

Navigate to Delegation

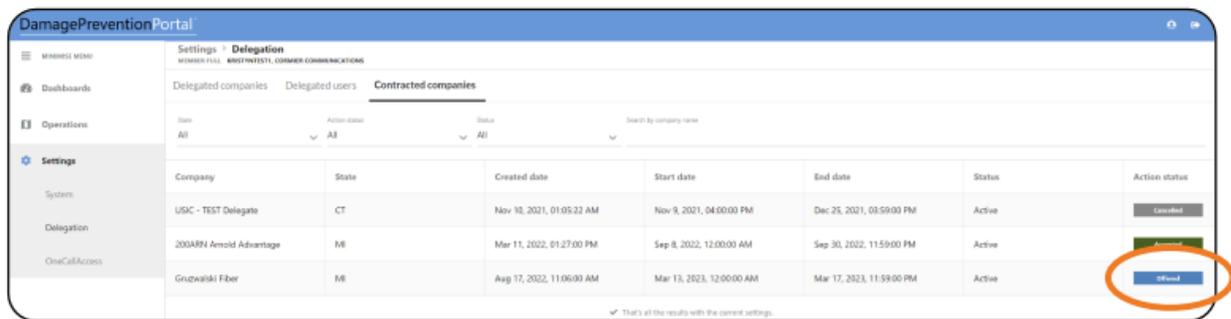
Before any action can occur, the facility owner/operator member must return the appropriate documentation detailing which delegated company has been authorized for specific CBYD responsibilities and to which stations this authorization is applied.

Delegation is the second section under the **Settings** menu. All settings associated with this feature reside here.





Next, a user from the delegate company must log into DPP to accept the offer and assign users to both the contracted company (a.k.a. “facility owner/operator member”) and that company’s station(s). Below are the steps.



Once the Member Services has set up the delegation, it will show up as “offered.”



Select this delegation to open and then click the green **Action** button in the upper right-hand corner. From here, you can accept or reject the offer.

An offer should be rejected if the delegated services are incorrect.

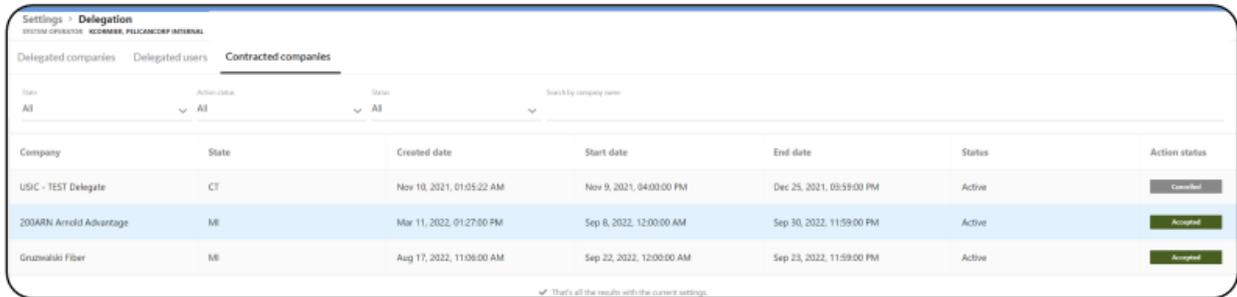
Accepting the offer does NOT change the facility owner’s delivery subscription. These changes happen at the facility owners’ station level.

Adding Users to Your Contracted Companies

You must now add internal users from your company. These are users that are often already in DPP under your company name.

Users are not assigned automatically because the delegate company may not want all its internal users on DamagePreventionPortal to work with the contracted companies.

Under the **Contracted Companies** tab, select the facility owner/operator member that has delegated your organization responsibility.



Company	State	Created date	Start date	End date	Status	Action status
USIC - TEST Delegate	CT	Nov 10, 2021, 01:05:22 AM	Nov 9, 2021, 04:00:00 PM	Dec 25, 2021, 08:59:00 PM	Active	Cancelled
200ARN Arnold Advantage	MI	Mar 11, 2022, 01:27:00 PM	Sep 8, 2022, 12:00:00 AM	Sep 30, 2022, 11:59:00 PM	Active	Accepted
Gruzewski Fiber	MI	Aug 17, 2022, 11:06:00 AM	Sep 22, 2022, 12:00:00 AM	Sep 23, 2022, 11:59:00 PM	Active	Accepted

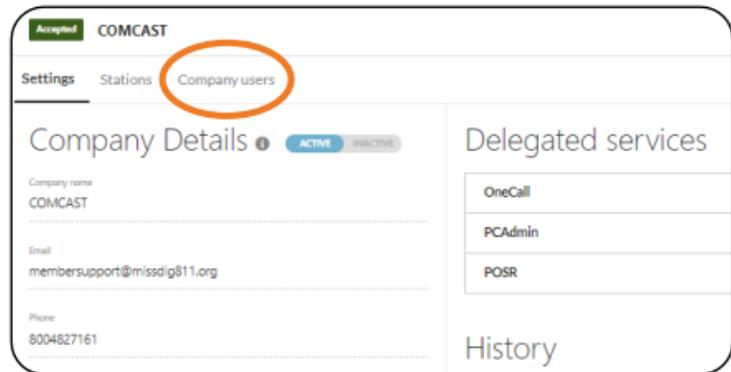
This will open a **Settings** window from the right side of the screen.

You will see tabs at the top: **Settings**, **Stations**, and **Company Users**.

Settings provides Company Details, Delegated Services, and History of the delegation you are viewing. **Stations** shows which stations have been included in that delegation.

Click **Company Users** to assign users from your organization to this specific contracted company.

In the **Company Users** section, click on the green **Add Existing Users** button on the right side of the screen.

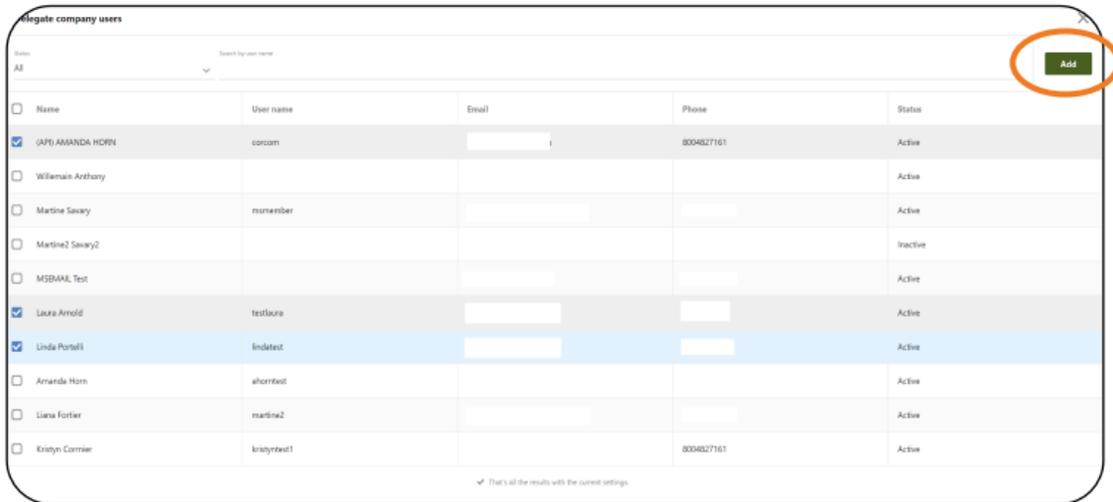


This will open a list of users you've assigned to this contracted company. If you have not yet completed this, the list will be empty. To add users, click **Add existing user**.



This will open a list of all users under your company.

Select one or more using the checkbox and then click the green **Add** button on the top right of the screen.



If your organization posts to PositiveResponse using API, you must add your POSR API account at this stage.

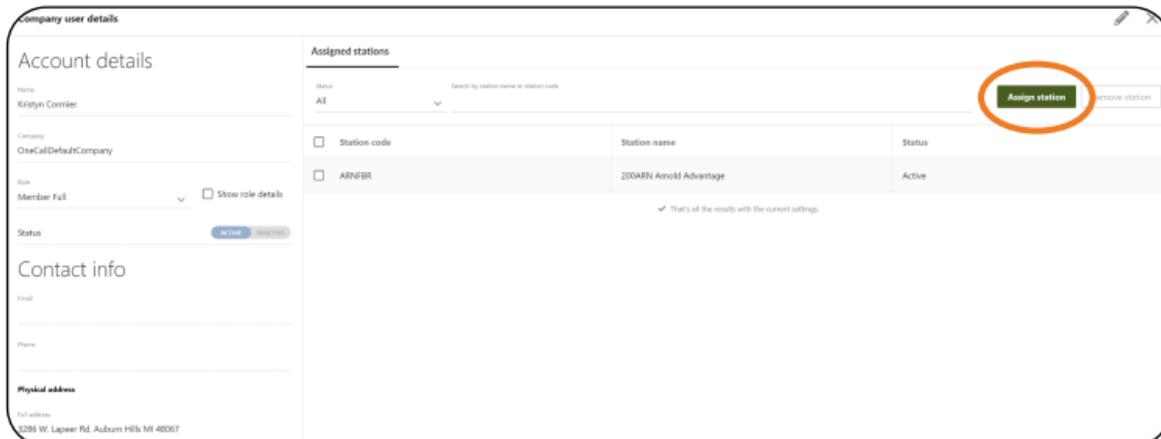
Assigning Stations to User Accounts

Users within the organization will not be able to see the customers' stations until they've been assigned access. This is the final step.

From the **Company Users** page, click on user to begin.

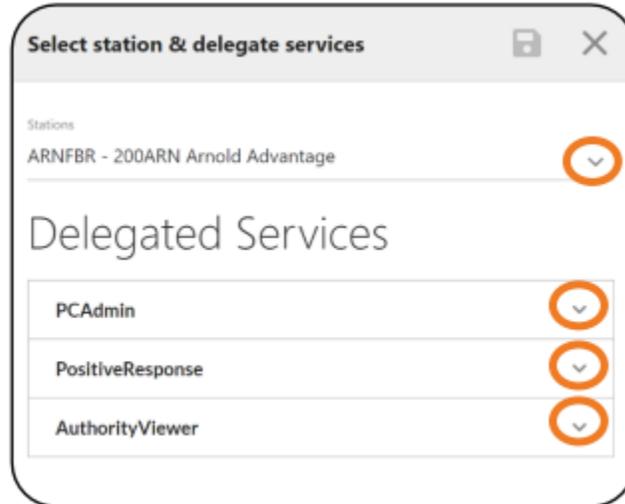


This will open the **Company User Details** page.



Click the **Assign Station** button, which opens the **Select Station & Delegate Services** window. You will be able to see all stations and delegated services included in the delegation offer.

Each field can be expanded by clicking the dropdown arrow.



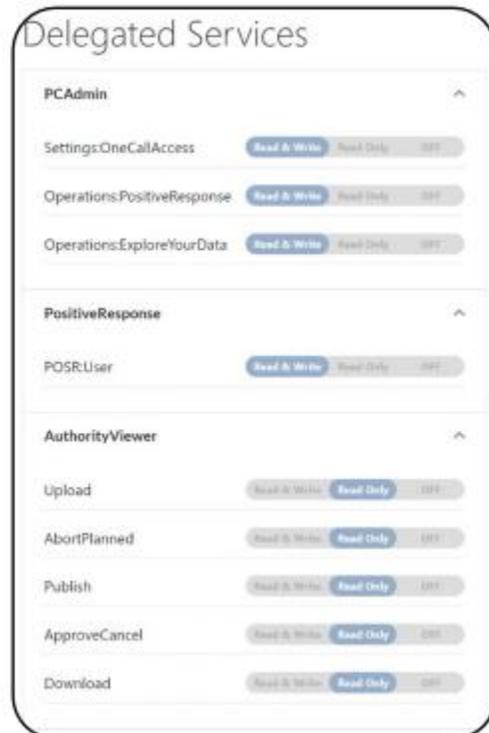
Select a station from the dropdown menu and expand each of the **Delegated Services** categories to view the options within.

Turn on services that user account will need to access, whether it be *Read & Write* or *Read Only*.

Click the save icon to complete the set up.



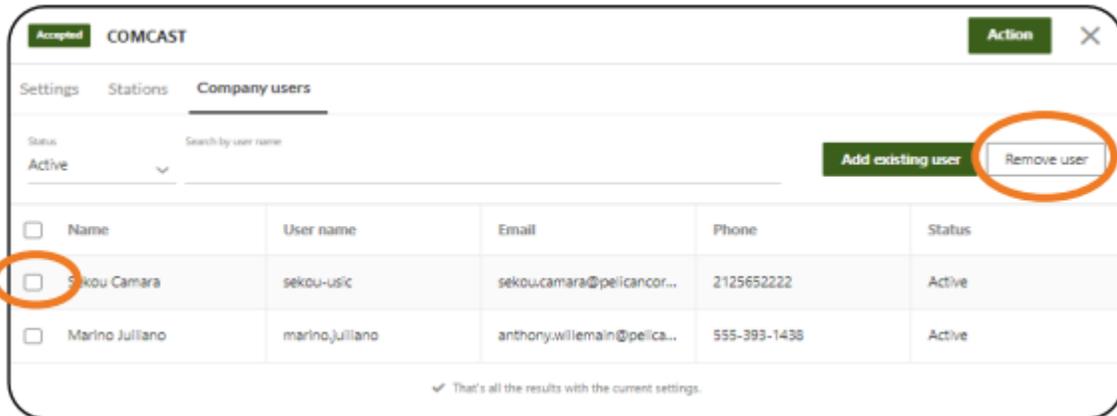
This step should be repeated for each station that a user needs to access



Removing Users

Assigned users can be removed as needed due to reassignment or employment status.

Select the checkbox next to the user you want to remove and then click the **Remove User** button.



OneCallAccess

OneCallAccess under the **Settings** menu functions differently than what is included under the **Operations** menu.

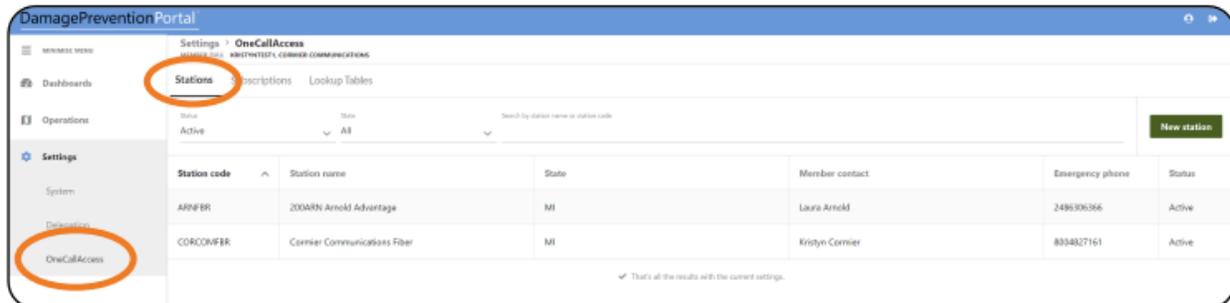
Settings: OneCallAccess enables authorized users to view their stations and subscriptions, and view/edit their AOIs.

Neither OneCallAccess option within DamagePreventionPortal allows for ticket entry; that is done through a separate platform.

Stations

Facility owner/operator members have stations that represent each specific facility type they own/operate. A station is an asset on DamagePreventionPortal under a membership that are most often per separate facility type; however, some members use stations to break up a single-facility-type-asset into regions. Only one facility type can be applied to a station.

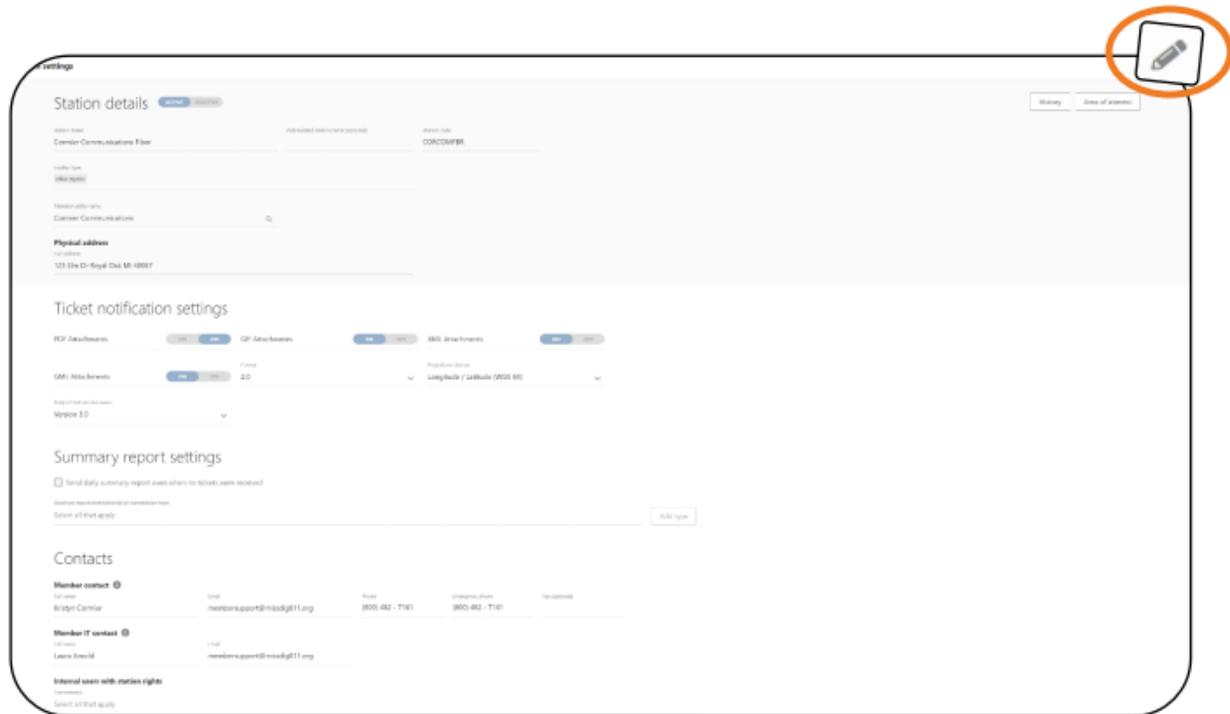
Stations are filtered by status and state (Connecticut). If a user has a large quantity of stations, they can search by the station code, station code name, or station contact.



Click on a station from the list to view **Station Settings**.

Station settings can be updated 24/7 with the appropriate user account access type or through the Call Center's Member Services Manager during normal business hours.

If editing through a user account, click the **pencil icon** to begin making changes.



Station Details

This section displays the following information:

- **Station name**, which is [generally] comprised of the member company name and the facility type.
- **Station code**, which is [generally] generated by company name and the facility type abbreviation. This cannot be edited.
- **Facility type**, which is the underground facility type designation.
- **Physical address**, which is defaulted to an address on file associated with the membership onboarding documents; can be changed if desired.

Once the **pencil icon** has been clicked, you can revise all fields except for **Station Code**.

Users should never change the Member Utility Name, Facility Type, or Station Name, as these are established from official documentation submitted to CBYD. Users should also never deactivate or activate stations. Changes to this information must come through the call center.

Ticket Notification Settings

This section displays options for ticket formatting. Ticket formatting is applicable per station.

Ticket Notification Settings		
Option	Recommended For	Description
Plain Text	Older, "line by line" parsing ticket management systems	Text format of ticket solely in the body of the email; not a text message; cannot be received with a PDF attachment
PDF Attachment	Members without a ticket management system	Ticket information and map; easy for printing or online viewing. Includes TXT email body.
XML Attachment	Newer ticket management systems	Data that can be consumed by most ticket management systems; includes TXT email body.
GML Attachment	Newer ticket management systems	Drawn dig site only in Geographical Markup Language; supplemental, not the ticket
GIF Attachment	Newer ticket management systems and members receiving plain text.	Image of drawn dig site overlaid on a base map (e.g., Google); supplemental, not the ticket.

A GIF attachment is the default selection.

All users not receiving PDF attachments should opt to receive a GIF or GML attachment, or both, so that the ticket work polygon is received. The XML and plain text contain lat./long. coordinates that is for the centroid of the ticket work polygon or bounding geometry connecting multiple work polygons, but this information is not reliable for locating underground facilities accurately.

Note: Presently, XML & GML attachments are offered at an additionally billed cost for CBYD members. If you would like to receive those formats, please contact the Call Center.

The screenshot shows the 'Ticket notification settings' interface. At the top, there are three toggle switches: 'PDF Attachments' (OFF), 'GIF Attachments' (ON), and 'XML Attachments' (OFF). Below these, there are three dropdown menus: 'GML Attachments' (ON), 'Format' (2.0), and 'Projection / datum' (Longitude / Latitude (WGS 84)).

Once the **pencil icon** has been clicked, you can turn any ticket notification setting attachment on or off.

When making changes to the ticket notification settings, first confirm internally the formatting is compatible with all your delivery destinations, especially if your organization uses a ticket management system. The **Projection/Datum** field should remain as is.

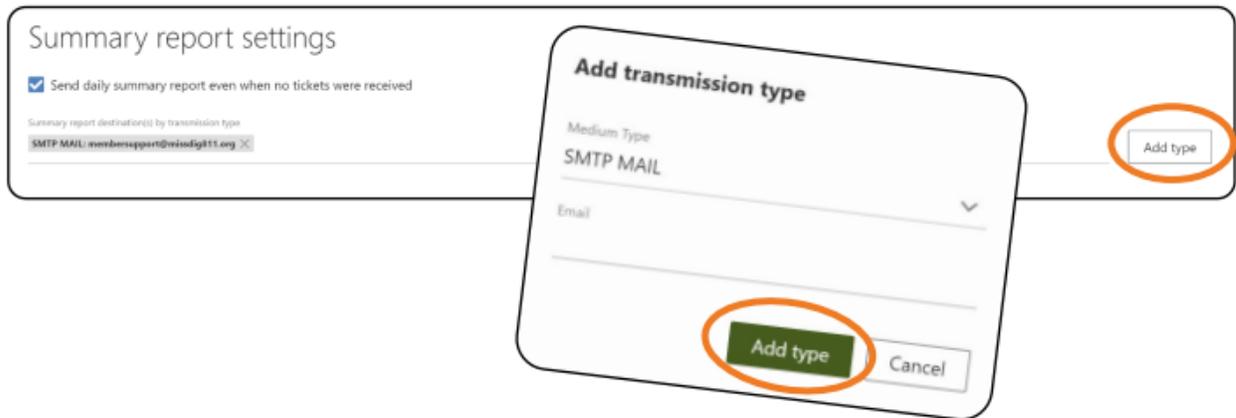
Summary Report Settings

This section displays the settings of the daily ticket summary reports received by members per station.

- Members can choose to receive a summary report regardless of whether they receive tickets in a day.
- Members can also choose the destination of their summary report. o Multiple destinations can be input.
- Summary reports are sent in the plain text format.

Once the **pencil icon** has been clicked, you can add or remove email address underneath **Summary report destination(s) by transmission type** for receipt of Summary Reports.

If the delivery email is already associated with your account, it will populate when you start to type it in. If this is a new email, select **Add Type** and the **Add transmission type** window will appear.



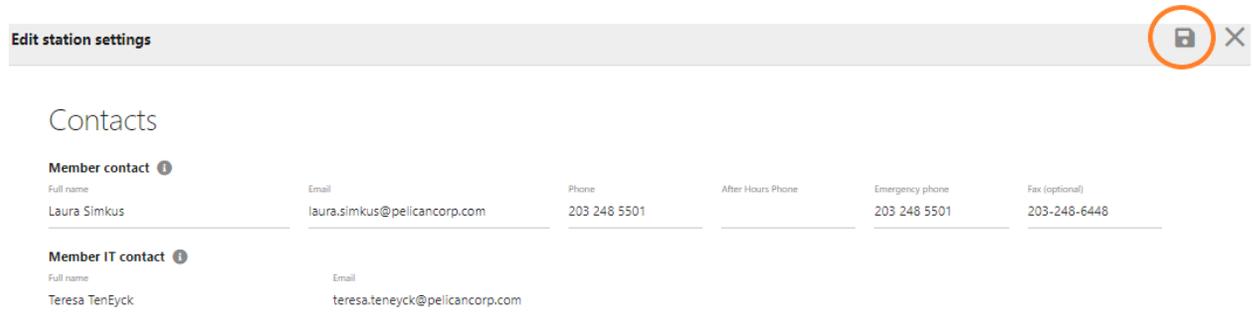
The **Medium Type** should always be **SMTP MAIL**, which is an email address.

Contact Types		
Company Details	Member Contact	Member IT Contact
<p>This information is associated directly with the membership and is ideally the billing address and general contact email/phone.</p>	<p>This is the primary contact for both the CBYD Call Center and excavators. This contact type requires a name, email address, phone number, and emergency/alt. phone number. The number in the PHONE field appears on tickets for excavators. The number in the EMERGENCY PHONE field may be provided to excavators upon contacting the CBYD Call Center when the PHONE information is invalid or unsuccessful.</p>	<p>This is a secondary contact primarily for use by the CBYD Call Center. Excavators cannot see this information, but the Call Center may provide it upon request for an alternate contact should the Member Contact be unavailable/unreachable. This contact type requires a name and email address. Members may want to use IT/Technology Department information here for troubleshooting issues, but it can also be used to provide alternate contact information should the primary contact be unavailable.</p>

Once the **pencil icon** has been clicked, you can update the **Member Contact** and **Member IT Contact** information.

All fields, except **Fax**, must be filled in.

When updates to **Station Details**, **Ticket Transmission Settings**, **Summary Report Settings**, or **Contacts** are complete, the user must click the **save icon** in the top-right corner to ensure the changes are saved to the system.



The screenshot shows a web interface titled "Edit station settings" with a lock icon and a close button in the top right. Below the title is a section for "Contacts".

Member contact ⓘ

Full name	Email	Phone	After Hours Phone	Emergency phone	Fax (optional)
Laura Simkus	laura.simkus@pellicanincorp.com	203 248 5501		203 248 5501	203-248-6448

Member IT contact ⓘ

Full name	Email
Teresa TenEyck	teresa.teneyck@pellicanincorp.com

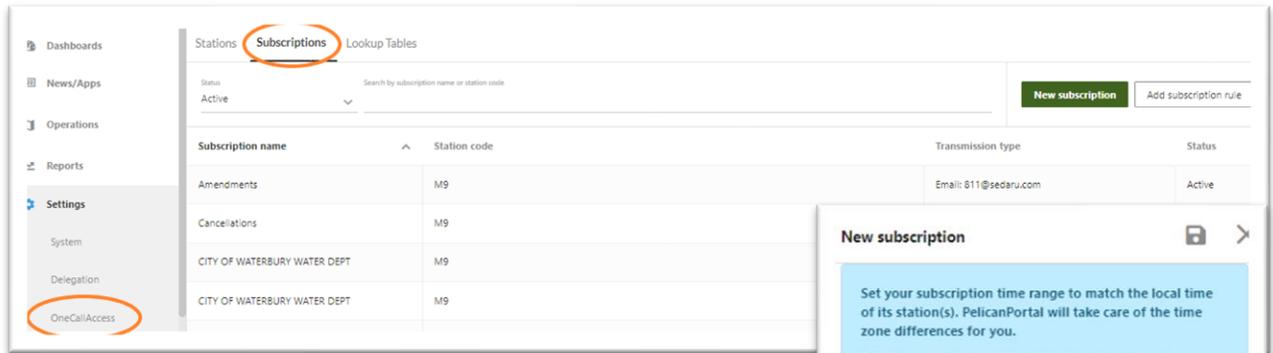
ServiceOperator and ServiceOwner account types have access to create new stations and activate/inactivate existing stations.

These actions should NEVER be completed.

If you need to create a new station or want to activate/inactivate existing stations, please follow procedure by contacting the Call Center.

Subscriptions

Subscriptions are essentially a member's ticket delivery destination(s). Members can view their subscriptions under **OneCallAccess** by clicking **Subscriptions**. Subscriptions are filtered by status and can be searched by subscription name or applied station code.



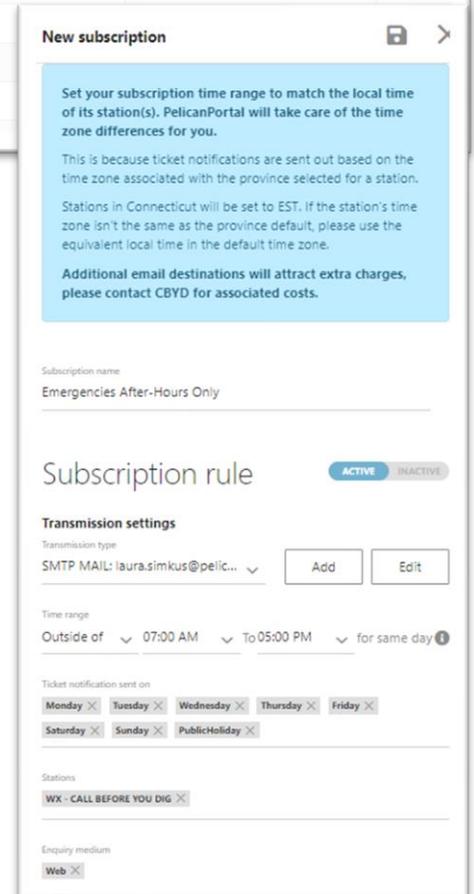
Members can have multiple subscriptions that are based on transmission type, time range, days of the week, stations, and ticket types.

IVR (phone) subscriptions can be used for Emergency tickets taken by phone after-hours only.

Webhook ticket delivery is also available. Information on this is available by contacting the Call Center. Webhook is primarily for use by members using a ticket management system.

Transmissions to multiple unique subscriptions will impact your annual invoice. Presently, a single email subscription destination is free, but any additional destinations added will be billed. For questions about this, please contact the CBYD Center Manager.

Subscriptions can be changed 24/7 with the appropriate user account access type or through the Call Center during normal business hours.

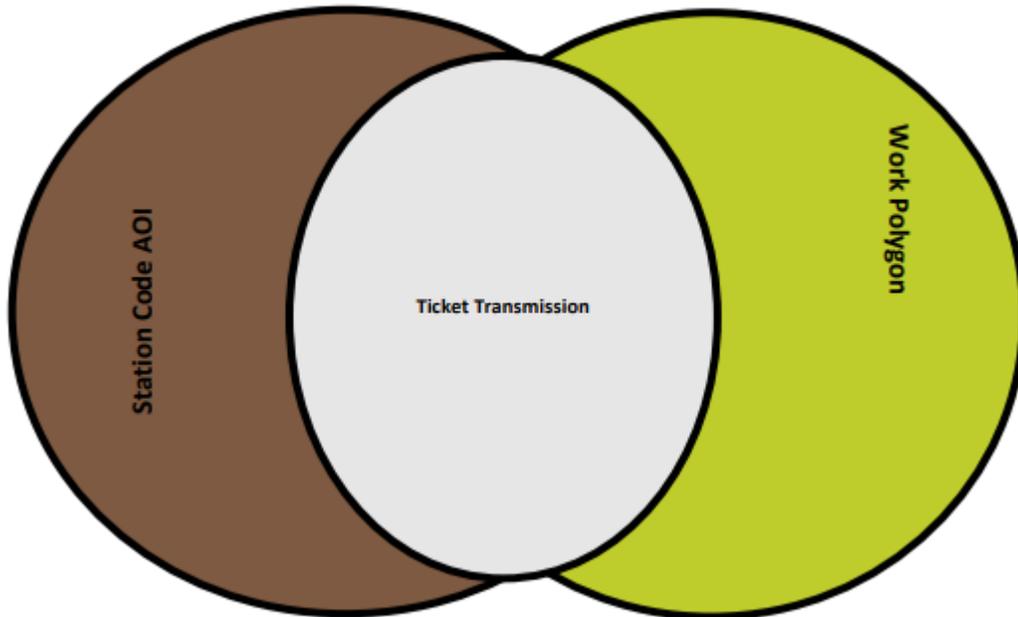


If your user account is enabled to edit subscriptions, it's crucial not to inactivate all subscriptions. Doing so will impact ticket receipt and ability to see tickets under Positive Response for posting.

AuthorityViewer

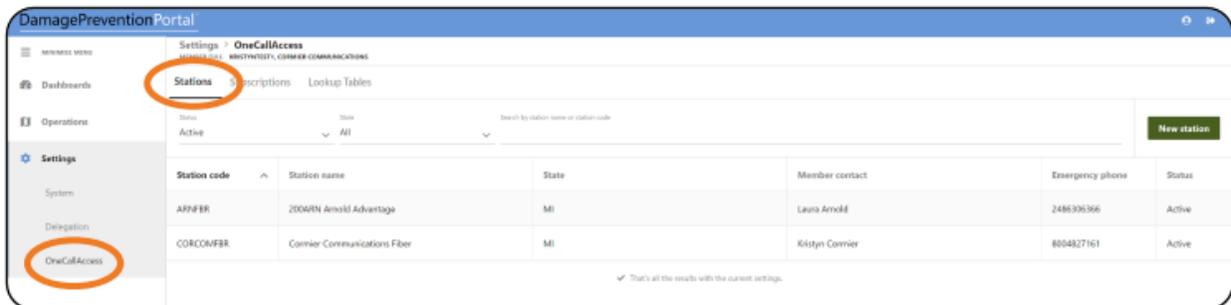
AuthorityViewer is the program within DamagePreventionPortal that allows users to view their area of interest (AOI) and upload replacement files per individual station associated with their user account.

This AOI is what triggers transmission (a.k.a. “delivery”) of tickets when it intersects with the work polygon drawn on tickets.



AuthorityViewer is entirely web-based and does not require download and installation. This program does not contain drawing tools; all shapes must be created outside of AuthorityViewer in other programs such as GIS software, Google Maps, or Google Earth. Refer to the PelicanCorp GIS Standards document at CBYD.COM for specifications on AuthorityViewer.

To access the program, click on **OneCallAccess** under the **Settings** menu and select the [default] **Stations** tab.



To view or edit an AOI, first open the desired station.

From here, you will click the white **Area of Interest** button to open AuthorityViewer.

Station settings



Station details **ACTIVE** INACTIVE

History **Area of interest**

Station name
CALL BEFORE YOU DIG

Abbreviated station name (optional)
CBYD

Station code
WX

Industry type
Communications

Navigating AuthorityViewer

The Map

You can navigate the map to view shapes by inputting location information into the **Search** field. The information can be entered just as it would be when using Google Maps. You can also insert navigational Lat./Long. reference points in the **Reference Points** section.



Tools

You have access to the following tools:

- **Reset Position:** Resets map to the default view.
- **Upload Data:** Begins the file upload process.
- **Rollback Live:** Reverts the AOI to the previously live layer.
- **Authority History:** Enables user to keep notes and view a recent timeline of activity.



Names and Progression

AuthorityViewer categorizes and displays files that have been uploaded as different “layers”. The layer type indicates the status or phase of an uploaded file.

1. **Candidate:** The most recently uploaded file that has not yet been approved for publication. This will show up in **red**.
2. **Approved:** The most recently uploaded file that has been approved and can be scheduled for publication. This will show up in **orange**.
3. **Planned:** The most recently uploaded file that has been scheduled for publication. This will show up in **blue**.
4. **Live:** The active file that determines ticket delivery. This will show up in **green**.
5. **Previous:** The direct previous file that is inactive. This will show up in **orange**.
6. **Archived:** All other previously active files that are inactive. Archived layers will show up in **black**.

View

Layers of the map can be viewed by clicking the Layer icon near the top-right corner. Visible layers include map views and uploaded files from enabled user accounts.

Different map layers (a.k.a. “views”) that a user can experience.

All existing layers associated with the station code; users can turn viewing on/off for different layers by clicking the blue checkbox.

Users can download a copy of each layer by clicking the grey box showing the AOI ID.

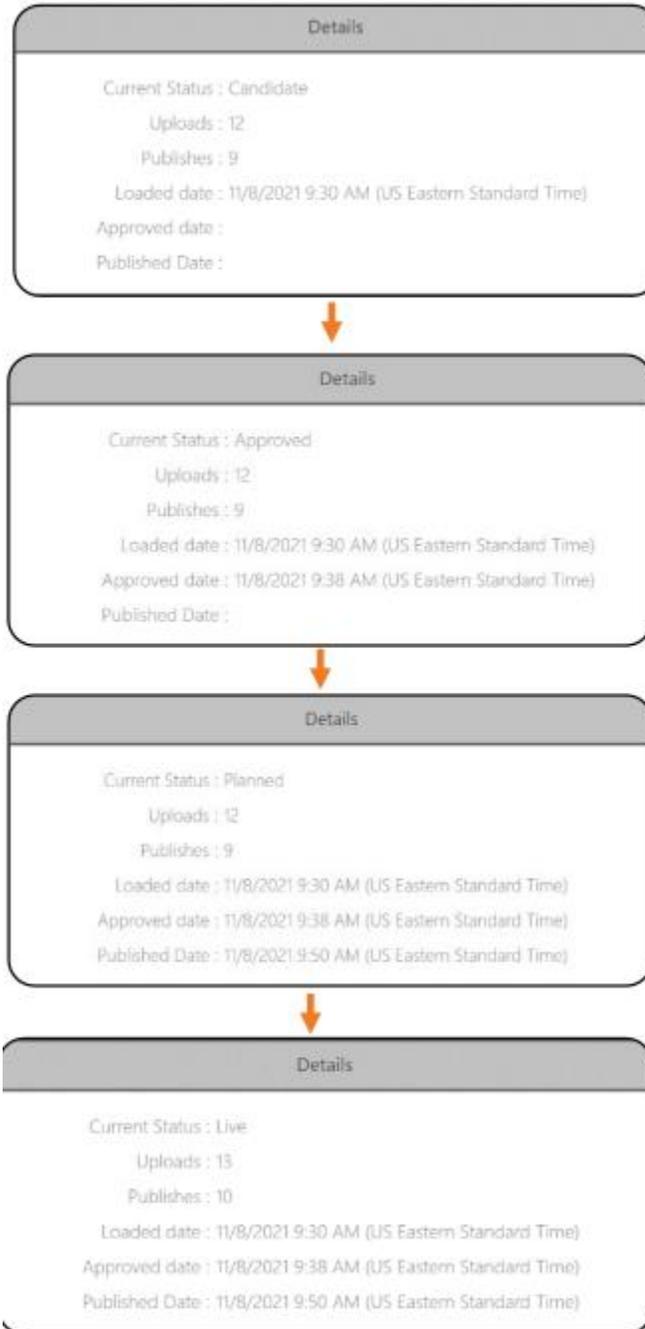
Each layer is titled in the following format:

[AOI ID] [Layer Type] [Date/Time of Upload] [File Name]

The AOI ID is a unique identifier assigned to a layer by the Pelican system.

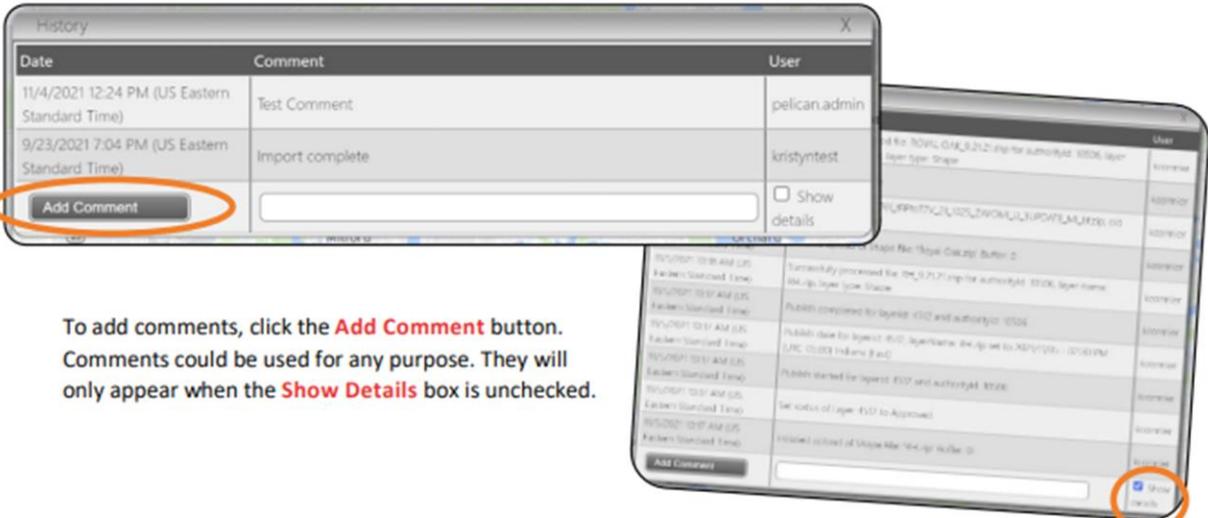
Details

The **Details** section provides details on the progression of layers from candidate to active so you can keep track of your work. When you upload a candidate layer, information on that layer will be populated here, including the Status (as “candidate”) and the Loaded Date. Once that candidate layer is approved, the Current Status will change to “Approved” and the Approved Date will become visible. This will continue through to a Live layer.



Authority History

Authority History allows you to keep notes and view the timeline of [recent] activity associated with the station.



The screenshot displays the 'History' window with a table of activity. The table has three columns: Date, Comment, and User. The first row shows a date of 11/4/2021 12:24 PM (US Eastern Standard Time), a comment of 'Test Comment', and a user of 'pelican.admin'. The second row shows a date of 9/23/2021 7:04 PM (US Eastern Standard Time), a comment of 'Import complete', and a user of 'kristyntest'. Below the table is an 'Add Comment' button, which is circled in orange. To the right of the table is a 'Show details' checkbox, which is unchecked. Below the screenshot, there is a text box that reads: 'To add comments, click the **Add Comment** button. Comments could be used for any purpose. They will only appear when the **Show Details** box is unchecked.' Below this text box, there is another text box that reads: 'When the **Show Details** box is checked, you can view the timeline of recent activity within AuthorityViewer. This information is recorded by the system and does not require manual input.'

Date	Comment	User
11/4/2021 12:24 PM (US Eastern Standard Time)	Test Comment	pelican.admin
9/23/2021 7:04 PM (US Eastern Standard Time)	Import complete	kristyntest

To add comments, click the **Add Comment** button. Comments could be used for any purpose. They will only appear when the **Show Details** box is unchecked.

When the **Show Details** box is checked, you can view the timeline of recent activity within AuthorityViewer. This information is recorded by the system and does not require manual input.

Update the AOI

Replacement Vs. Addition

At the present time, files uploaded only replace the active AOI. The system does not allow for additions to existing layers through AuthorityViewer.

If you don't have the ability to create a replacement file, please contact our GIS team.

Formats and File Contents

DamagePreventionPortal accepts shapefile, KML/KMZ, and TAB formats. All uploads must be in zip files.

Files can contain polygons, lines, or points. Datum used must be NAD83 or WGS84. The zip file size should not exceed 155 MB.

A Note on the Shapefile Format:

When uploading a shapefile, you must attach a zip file containing the following file extensions only:

.SHP, .SHX, .PRJ, and .DBF. The inclusion of additional file extensions may cause the upload to fail.

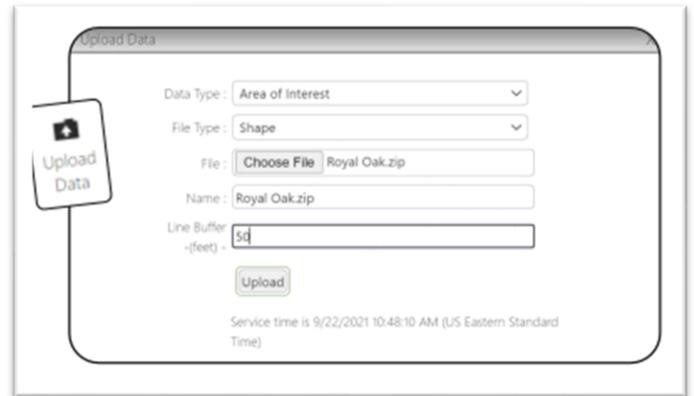
It's important to note that DamagePreventionPortal only needs geometry, so please strip files to remove metadata prior to upload. This will help the upload process run more efficiently.

Step 1: Upload

To upload a file, click the **Upload Data** icon.

This will generate a pop-up menu to input data for upload.

- **Data Type:** This will always show “Area of Interest”.
- **File Type:** Select the file type you are uploading.
- **File:** From your computer, select the file you are uploading.
- **Name:** This will show whatever the file name is; it can be changed if you’d like to label it differently.
- **Line Buffer:** The system imposes a minimum 1-foot buffer on line and point data; however, **CBYD**



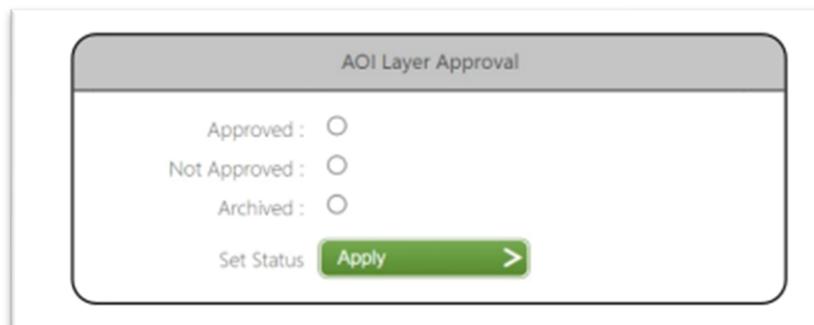
recommends the use of a minimum 20-foot buffer. Please consider that ticket delivery is triggered by the intersection of the work polygon drawn by the excavator or CBYD Agent. This buffer is not seen by the excavator or facility owner/operator member.

Once complete, click the **Upload** button.

Step 2: Approve

Once the file is uploaded, it becomes a “candidate layer” that requires approval. You must approve the candidate layer before it can be published on the server. Approving the candidate layer automatically turns the file into an “approved layer”.

Under the **AOI Layer Approval** heading, select “Approved” and click the green Apply button.



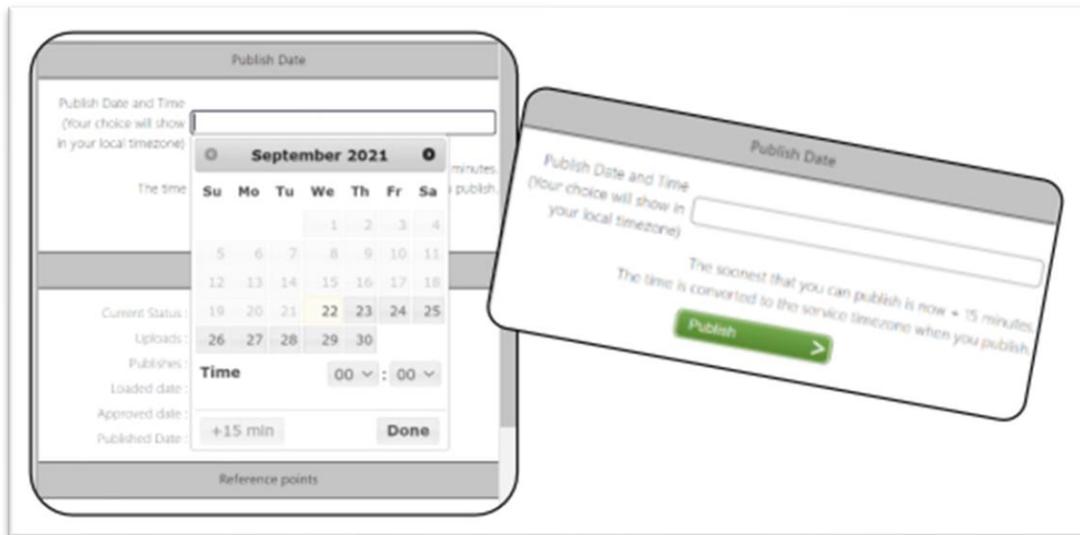
If you change your mind about the upload or determine it is incorrect, you can select “Not Approved” and click the green **Apply** button. This will essentially remove that upload (a.k.a. “candidate layer) from the system and allow you to start over.

Step 3: Publish

Once approval is complete, it is time to publish the layer.

Under the **Publish Date** heading, click within the blank field to set the publication date/time. The earliest a file can be published is 15 minutes out from the time the file was uploaded. This can be done by clicking **+15**. Once a date/time has been selected, you must click **Done**.

When you are ready to publish the layer, which means that ticket receipt is triggered by those shapes, click the green **Publish** button.



The layer will then change to a blue “planned layer”. The file will remain a planned layer until the chosen publication date/time. Verify the publication was successfully set to “planned” before exiting the window.

Important Reminders

- There are occasional delays in AuthorityViewer after any action is completed. If you experience a delay, please allow the system some time to process before re-attempting or completing the next step.
- Attempting to upload a file while there is an existing candidate or approved layer will result in failure and may block future upload attempts. If you decide not to use a candidate or approved layer, go back to the **AOI Layer Approval** heading and select “Not Approved”.
- If you realize that a published layer is incorrect, click the **Rollback Live** button to revert to your previously active layer. Doing so quickly will alleviate repercussions of having an inaccurate AOI, which will likely cause your station to miss tickets.

File and Processing Information

If you are using SHP files:

- Only include .shp, .prj, .shx, and .dbf extensions in the zip file.
- Remove metadata from the file; only geometry is needed.
- Reduce the number of vertices in the file.
 - o The number of vertices has a direct correlation with the file size.
- Merge clustered polygons, multi-object polygons, or polygons intersecting/overlapping with one another to ensure every object in the layer is an individual polygon. Some GIS tools may call this “dissolve.”
 - o Multi-object polygons will cause significant performance upload problems.
- Ensure all objects/polygons are in one single layer and that your file does not contain multiple layers.
- Ensure the final zip file is under 155MB.

If you are using KML or KMZ files:

- Only include the .kml or .kmz file extension in the zip file.
- Remove metadata from the file; only geometry is needed.
- Reduce the number of vertices in the file.
 - o The number of vertices has a direct correlation with the file size.
- Merge clustered polygons, multi-object polygons, or polygons intersecting/overlapping with one another to ensure every object in the layer is an individual polygon. Some tools may call this “dissolve.”
 - o Multi-object polygons will cause significant performance upload problems.
- Ensure all objects/polygons are in one single layer and that your file does not contain multiple layers.
- Ensure the final zip file is under 155MB

Additional Considerations and Reminders

- Supplying polygon data with your own buffer is ideal.
- If you supply lines, this type of file can be uploaded into AuthorityViewer, but you must specify the buffer.
- In cases where you want to have different buffer sizes for each object, this buffer’s size is specified in the attribute data and it must be prepared before uploading to AuthorityViewer.
- You cannot upload mixed lines, points and polygons directly into AuthorityViewer. This must be combined and prepared prior to uploading.

Please contact our support team if:

- You have only an addition to current AOI being supplied, as AuthorityViewer only allows complete replacement of current coverage.
- You are unable to provide the accepted file types.
- You experience any issues with AuthorityViewer.

Conclusion

This completes the DamagePreventionPortal overview. Please contact our call center with any questions.

SUPPORT CONTACTS	
Laura Simkus - <i>Center Manager</i>	Email: Laura.simkus@pelicancorp.com Phone: 203-248-5502
Teresa TenEyck - <i>Member Services Manager</i>	Email: Teresa.TenEyck@pelicancorp.com Phone: 800-922-4455
General Support	Email: Inquiries@cbyd.com
GIS Team	Email: GIS@PelicanCorp.com