WebTMS User Guide

OUPS

Part 1 – Client Setup

Client Setup (.NET, Internet Explorer)

The WebTMS application itself is a windows executable program. In order to run WebTMS, you must have the **Microsoft .NET Framework 1.1** installed on your computer. This can be downloaded via Windows Update or directly from the Microsoft Download Center.

There are two options for launching the WebTMS application. The first method is by going to the WebTMS website, logging in, and clicking the "Run WebTMS from your browser" link. The second option is to download and install WebTMS onto your computer and launch it from the Start menu or from an Icon on your desktop. The second option, downloading and installing WebTMS locally, requires that you have Windows Administrative rights on you computer. If required, you may need to login to Windows as an Administrator to install (and also to update) the WebTMS application.

Running WebTMS from your browser (Internet Explorer)

To run WebTMS from your browser directly (via clicking a link to the application), you must first perform a one-time security configuration. To do this, follow these steps:

Internet Explorer Setup

First, we must configure the WebTMS website as a Trusted Site in Internet Explorer.

1. Open Internet Explorer
2. At the top, go to the "*Tools*" menu and select "*Internet Options*"
3. Click the "*Security*" tab
4. Find in the lower portion of the dialog the area for "*Security level for this zone*".
5. Verify that the level is set to "*Low*". If necessary, click the 'Custom Level' button and at the bottom of the dialog displayed, select "*Low*" and click the "*Reset*" button. Then click OK to return to the "*Internet Options*" dialog.
6. Back on the "*Security*" tab, there will be a list of icons, click the "*Trusted Sites*" icon
7. With the "Trusted Sites" icon selected, click the "*Sites*" button below it to open the trusted sites list.
8. In the "Trusted Sites" dialog, uncheck the "*Require server verification (https:) for all sites in this zone*" option if it is checked.
9. In the "*Add this Web site to this zone:*" field, enter the host server for WebTMS. Note that it can include a wildcard, which will allow you to specify all sub-domains at once. For example, enter "**.ncocc.org*" for NCOC, or "**.oups.org*" for OUPS, or "**.vups.org*" for VUPS, or "**.uncc.org*" for UNCC, etc. Once you enter a value, you must click the "*Add*" button to add that value to the list of websites. When done, click the "*Close*" button to dismiss the "*Trusted Sites*" dialog and then click the "*OK*" button to dismiss the "*Internet Options*" dialog.
10. Click the "*Add*" button to add the site to the Web sites list.

.NET 1.1 Security Setup

Second, we must configure the .NET Framework 1.1 Trusted Sites to allow full trust.

1. Open the Windows Control Panel
2. Double-Click on "*Administrative Tools*"
3. Double-Click on "*Microsoft .NET Framework 1.1 Wizards*"

4. A small window will appear with 3 icons. Click the first icon labeled "Adjust .NET Security"
5. On the first step of the "Security Adjustment Wizard", you can select either "*Make changes to this computer*" or "*Make changes for the current user only*". Then click "*Next*".
6. On the next step, click the "*Trusted Sites*" icon (zone) to select it.
7. If the slider is not all the way up, to "Full Trust", then slide it up.
8. Click "*Next*" and then Click "*Finish*"

Downloading and Installing WebTMS to your computer

The second option for launching WebTMS to do download and run the WebTMS Setup so that it is installed on your computer. To do this, simply download and run the setup program. You will need Windows Administrator rights in order to install WebTMS on your machine. There are a couple benefits to installing WebTMS to run off your computer. First, it takes less time to start up and you do not have to login to the WebTMS web site first. Secondly, you can run the WebTMS client application from your computer without being connected to the internet.

Corporate Firewall Setup

If your organization uses a firewall and/or proxy, you may have to configure it to allow all inbound and outbound traffic to the WebTMS server(s). Please check with the one-call center for the exact domain name and IP addresses of the WebTMS servers. Note that *all network traffic with WebTMS is done over port 80 (HTTP)*.

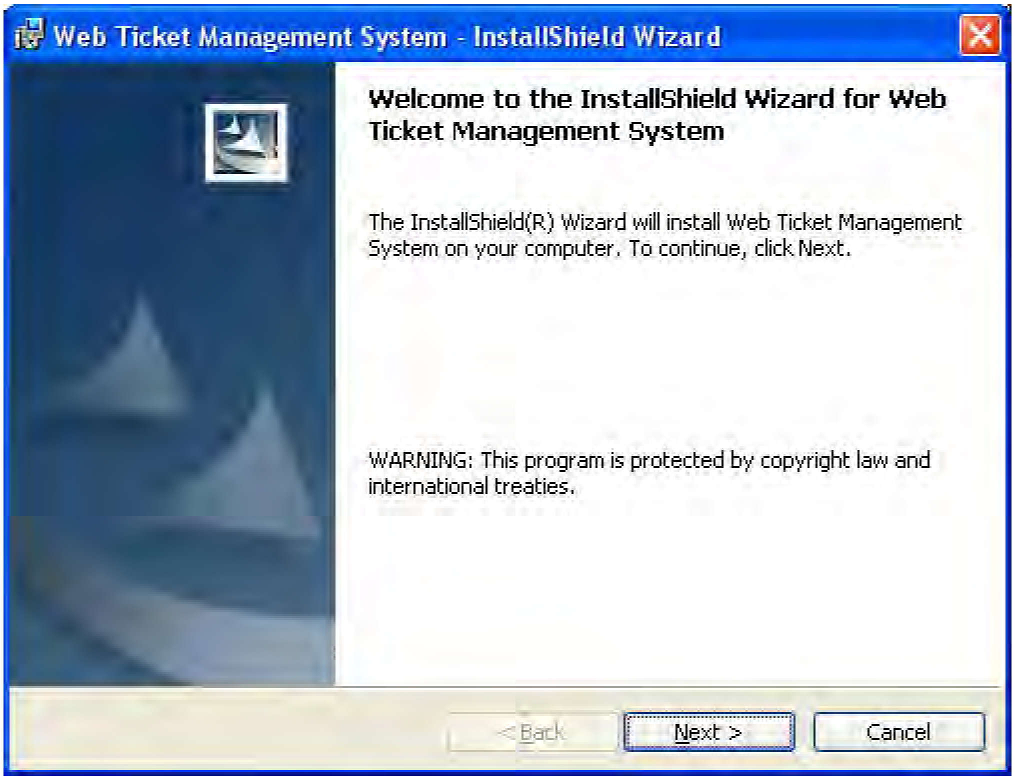
Part 2 – Running WebTMS

Running WebTMS

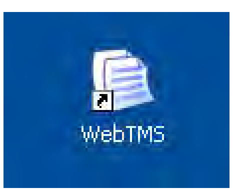
WebTMS can be launched either from the WebTMS web page, which requires initial setup for .NET and Internet Explorer, or by running WebTMS from a locally installed copy. Running the WebTMS client application from a web page is straight forward; simply click the link "Run WebTMS directly from your browser." After a few moments, the WebTMS window show appear. The alternative is to run WebTMS from a local install.

Local Install

When you run the WebTMS setup so that the client is installed on your computer, you should have an icon on your desktop for WebTMS. You should also find a shortcut to the client application in your Start menu.



Once installed locally, you should have the following Icon on the Desktop. In addition, there will be a WebTMS menu item under Windows' Start / All Programs. The application can be un-installed through the normal Windows Add/Remove Programs feature.

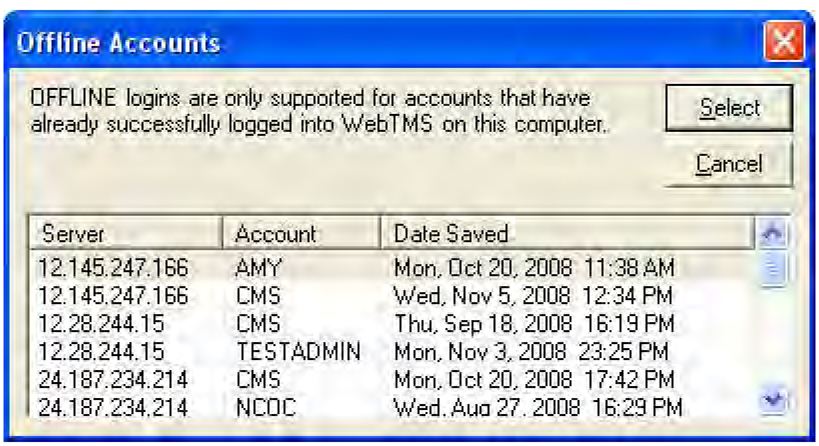


Login Screen

On the login screen, enter the WebTMS server hostname, your account name and password. Once you have logged in, the server and account name will remembered for future re-use.

Offline Mode

The OFFLINE option allows you to run the client application, which normally communicates with the WebTMS server, without an active internet connection. However, this option will only be available for accounts that have already successfully logged in to the server. Therefore, the first time you run the WebTMS client in this manner, you will not have this option on the login screen.. After are successful login, the program will save a snapshot of all the tickets and responses, to disk. When you login in offline mode, this latest snapshot will be loaded. The button next to it, with the ellipses, will display a list of valid server/account combinations that can login in OFFLINE mode.



Run From Webpage

The alternative to installing WebTMS locally is to run it directly from a webpage link on the server. In order to do this, you will have to set up the .NET and Internet Explorer security to enable this. This is a feature of the .NET Framework 1.1.

Part 3 – Software Update Process

Software Update Process

This document describes the update process. Under Windows, you will need to have Administrator rights in order to update or re-install the software. Some users, particularly Locators, may require administrative assistance.

Running from Web Site

If you run the client from the website, then you will always be running the latest version of the software. No special updating is required.

Local Installation

If the client application is installed locally, then there are two options for updating: (1) re-install the application or (2) client auto-update process.

Re-Install Application

To re-install the application, download the application Setup.exe from the website. Run Add/Remove Programs in the Windows Control Panel to uninstall the current version, then run the Setup.exe that was downloaded.

Client Software Auto-Update

If the version of the application on the WebTMS server changes, the client will show the following dialog when you try and login. You must update the application, you cannot run an older version. *Windows Administrator rights will be required to complete the update.* Click the UPDATE button to have the client download, install and automatically restart the client application. You should then see the new version number on the login screen, in the lower left.


WebTMS - Application Update
WebTMS
INTERNET TICKET MANAGEMENT SYSTEM
New Application Version!
A new version of this program has been released. WebTMS applications are required to run with the latest version. To automatically update your copy, click the UPDATE button. Otherwise, you can manually download and update the application from the website.
Current Version: 4.1.0.0
New Version: 4.1.0.2
UPDATE
Cancel

Part 4 – Ticket Processing

Ticket Processing

Tickets are received from the One-Call center via e-mail and are then parsed and loaded into the system. Each ticket is then further broken down by member code. For each member you handle (see Member Codes) that is on the ticket, there will be a response record created. The status of the full ticket depends upon the status of the response items.

Ticket Stages

The following table shows the different ticket stages once they appear within client software:

IR	Initial Receive	All response records have stage IR (or are completed, stage CT). This is the default un-assigned and un-completed state. Use Auto-Assign rules to automatically assign tickets to a locator (stage AL)
PA	Partially Assigned	There are multiple response records and at least one has stage IR.
AL	Assigned to Locator	All response records have stage AL (or are completed, stage CT).
CT	Completed	All response records have stage CT. The ticket is completed (or closed.)

Response records themselves cannot be in the PA (Partially Assigned) stage, they will either be in IR (Initial Receive, Un-assigned), AL (Assigned to Locator) or CT (Completed).

Initial Loading Ticket Processing Stages

When the system first receives, parses and loads a ticket into the system, it will go through this predefined set of stages, in this order, until it enters one of the Ticket Stages listed above, through optional Auto-Assign and Auto-Complete rules.

IL	Initial Load	Ticket has been loaded by the system and are ready to be parsed. At this stage, we simply have an email that could be a ticket, end of day summary or administrative message. Tickets will then go into the Geocoding (GC) stage.
GC	Geocoding	Ticket is geo-coded to determine the (lat, long) location, or an approximation of this, if possible. Ticket is then promoted to the Local Area Assign (LA) stage.
LA	Local Area Assign	System will attempt to assign the ticket to a Local Area. If local areas are not used, the default/un-assigned local area is used. Ticket is then promoted to the Auto-Complete (AC) stage.
AC	Auto-Complete	System will check the Auto-Complete rules. Matching rules may be applied and response(s) posted automatically. Ticket and Response stages are then promoted to Auto-Assign (AA)
AA	Auto-Assign	System will check the locator Auto-Assign rules and try to assign each response entry to a locator. Response entries that do not get auto-assigned will be assigned the Initial Receive (IR) stage. Assigned entries will go into the AL stage and have a locator assigned

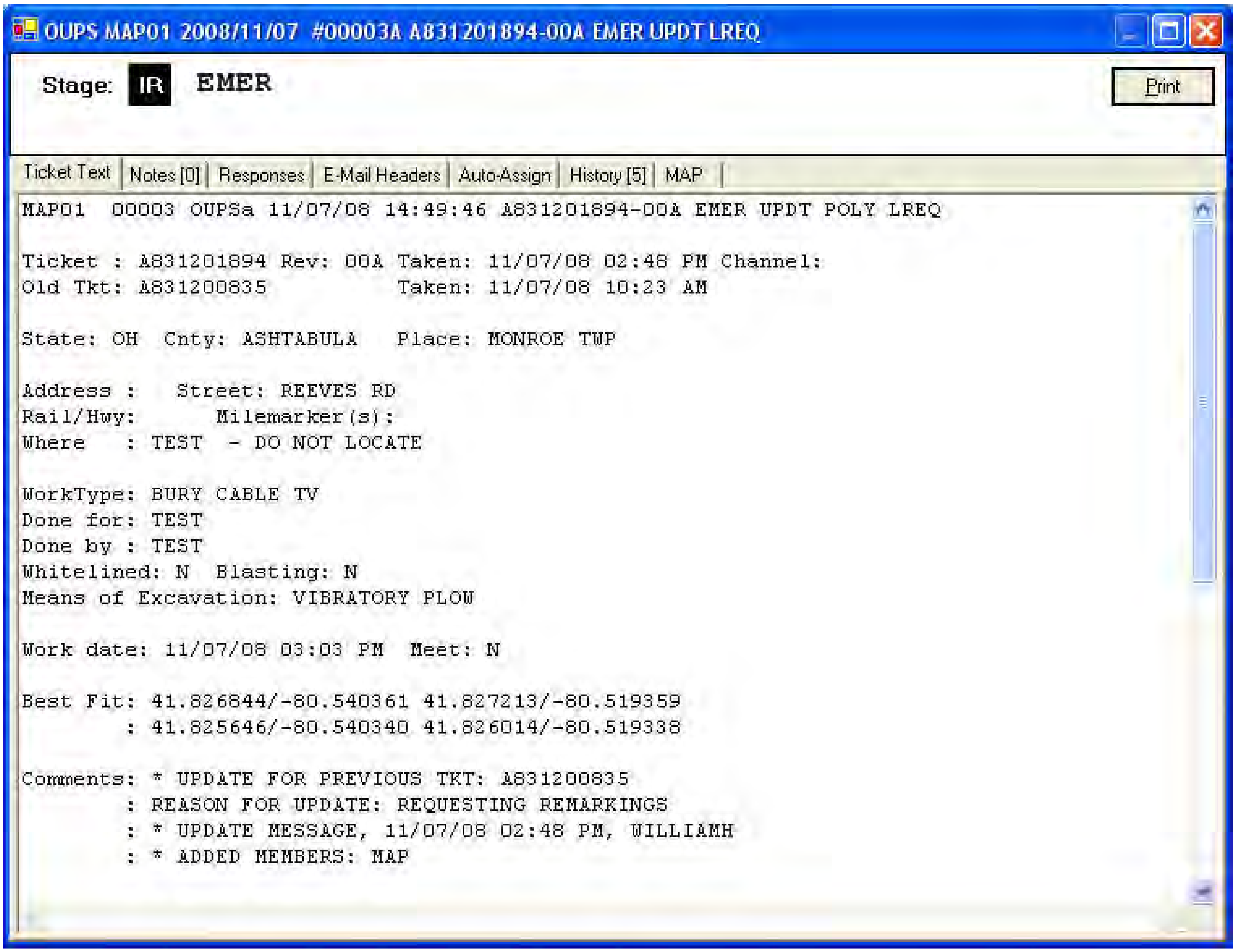
Part 5 – Ticket Window

Ticket Window

This window displays the full ticket, along with history, responses and other data specific to that ticket.

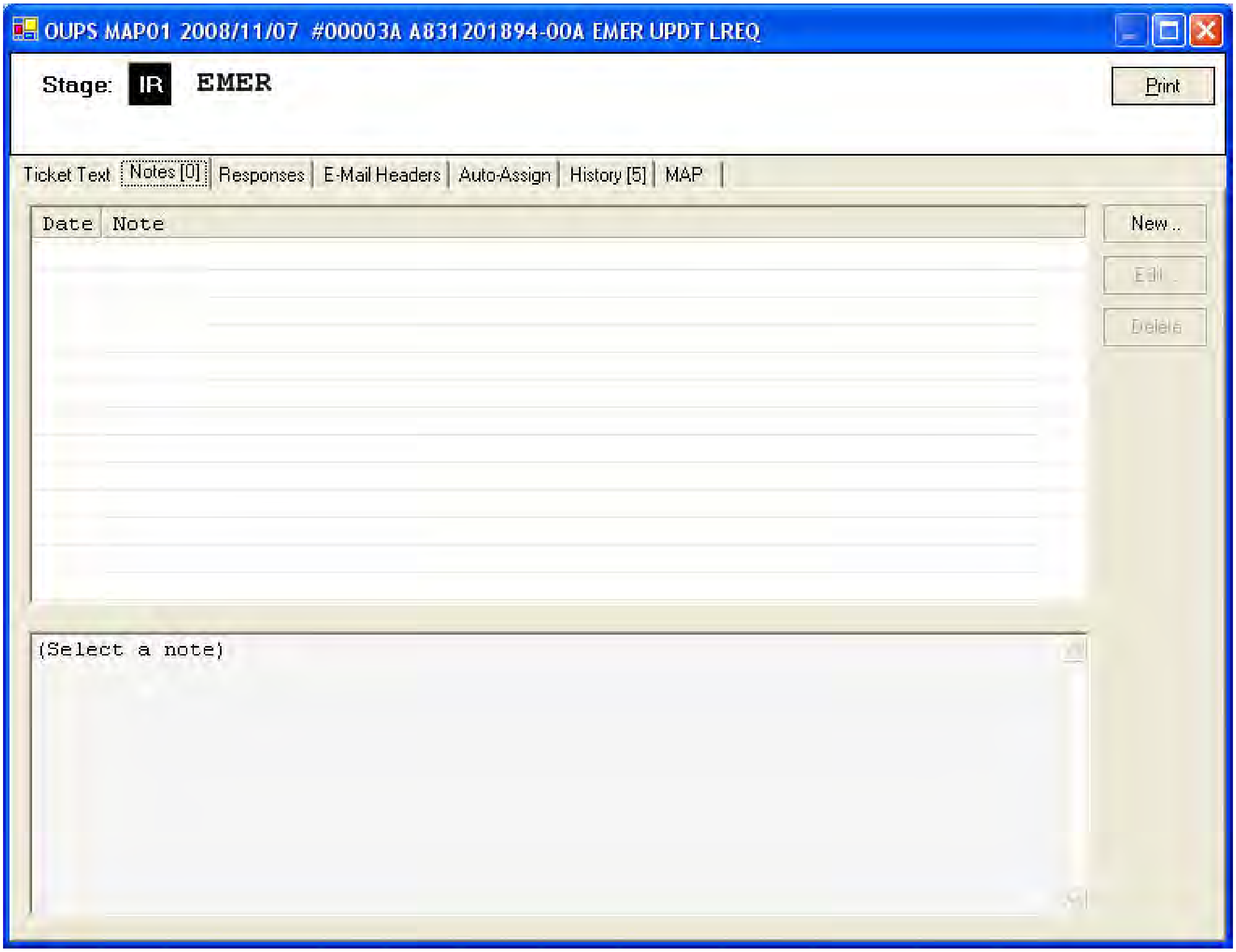
Ticket Text

This tab displays the full ticket text, as received by the one-call center.



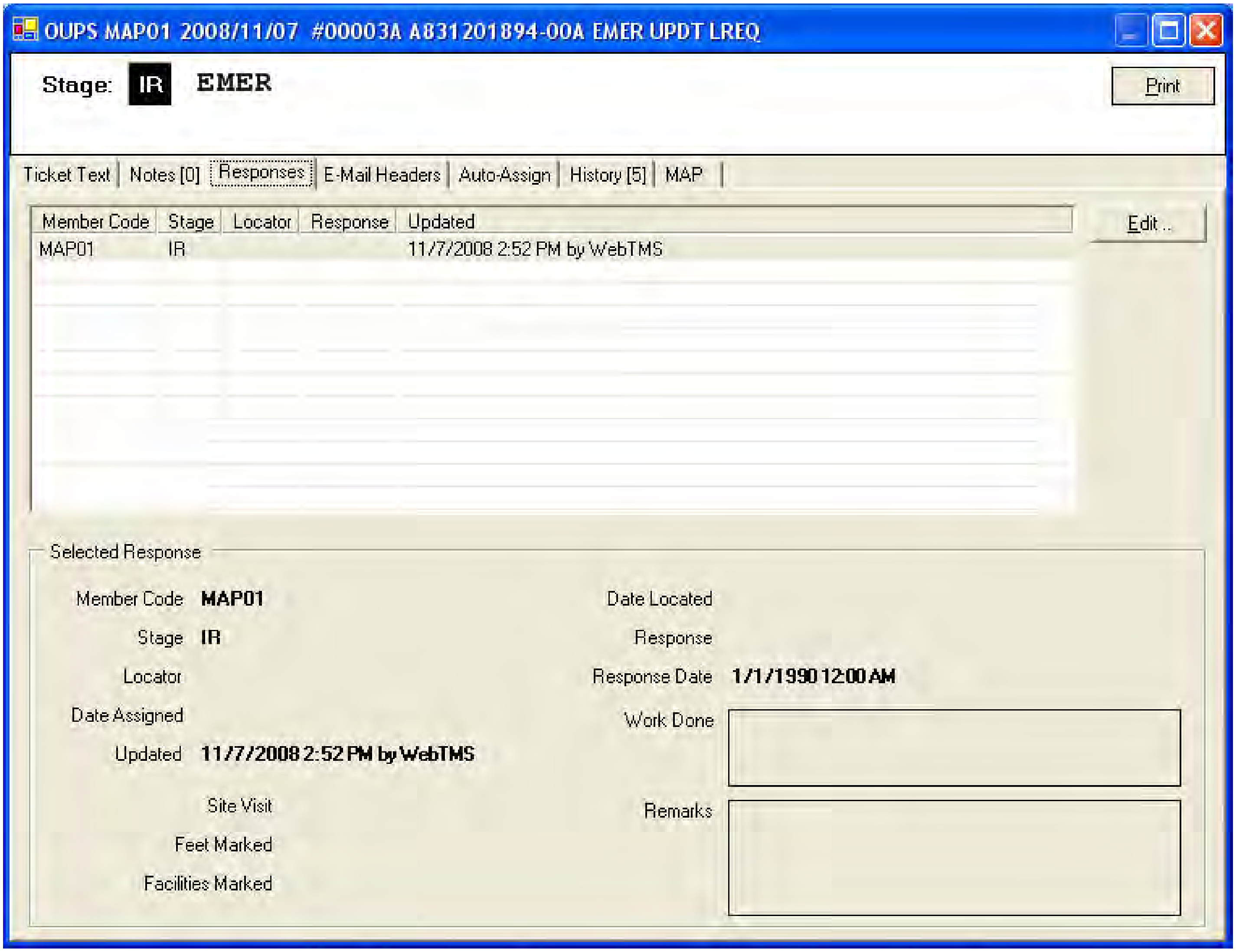
Notes

The Notes tab allows you to add textual notes to the ticket. Select a note to view it. Use the New, Edit and Delete buttons to manipulate it.



Responses

The responses tab displays each member code response record associated with this ticket. Select a member code and Use the Edit button to edit the ticket response.



E-Mail Headers

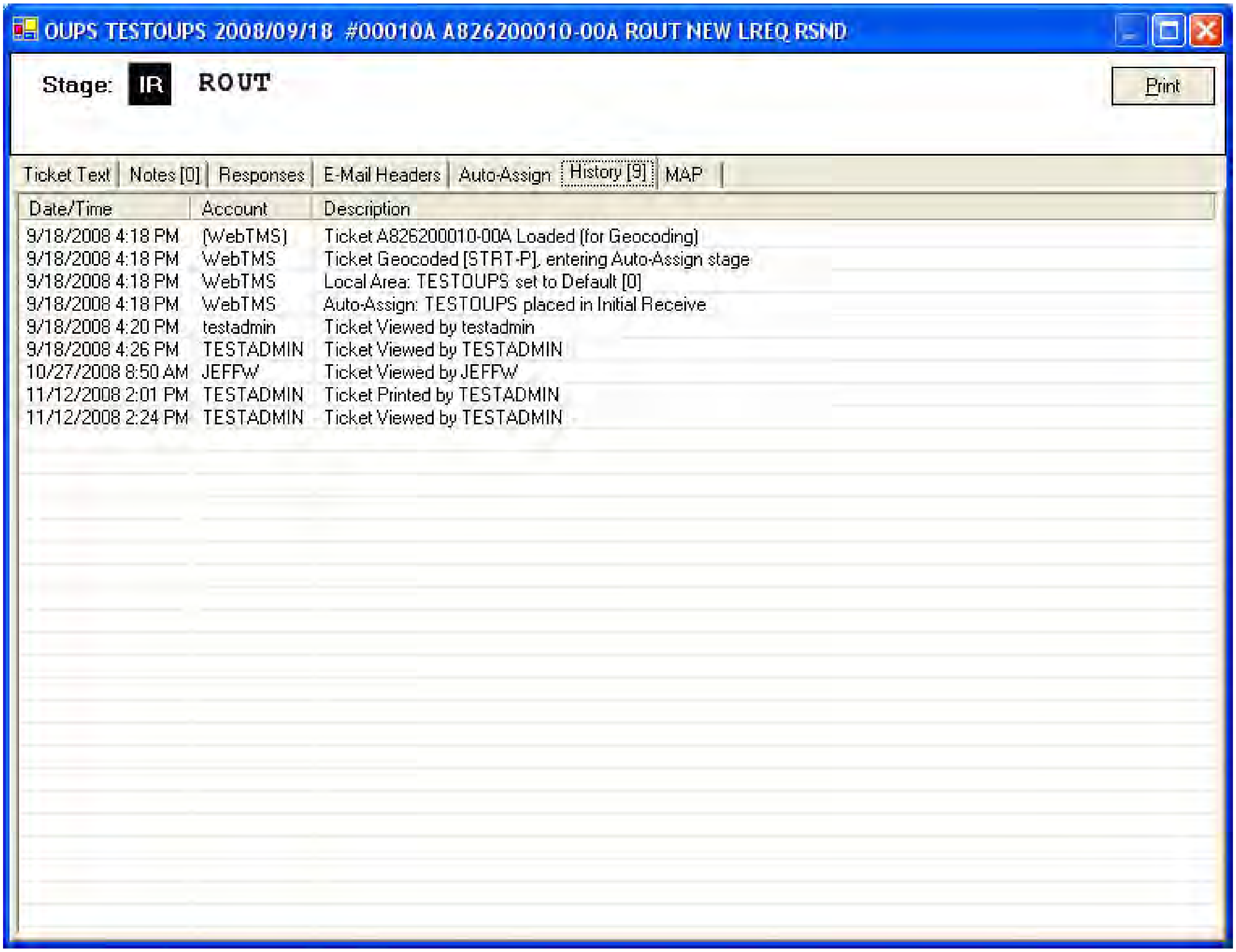
The E-Mail Headers tab displays the original e-mail headers for the ticket.

Auto-Assign

The Auto-Assign tab displays a description of how the ticket was auto-assigned.

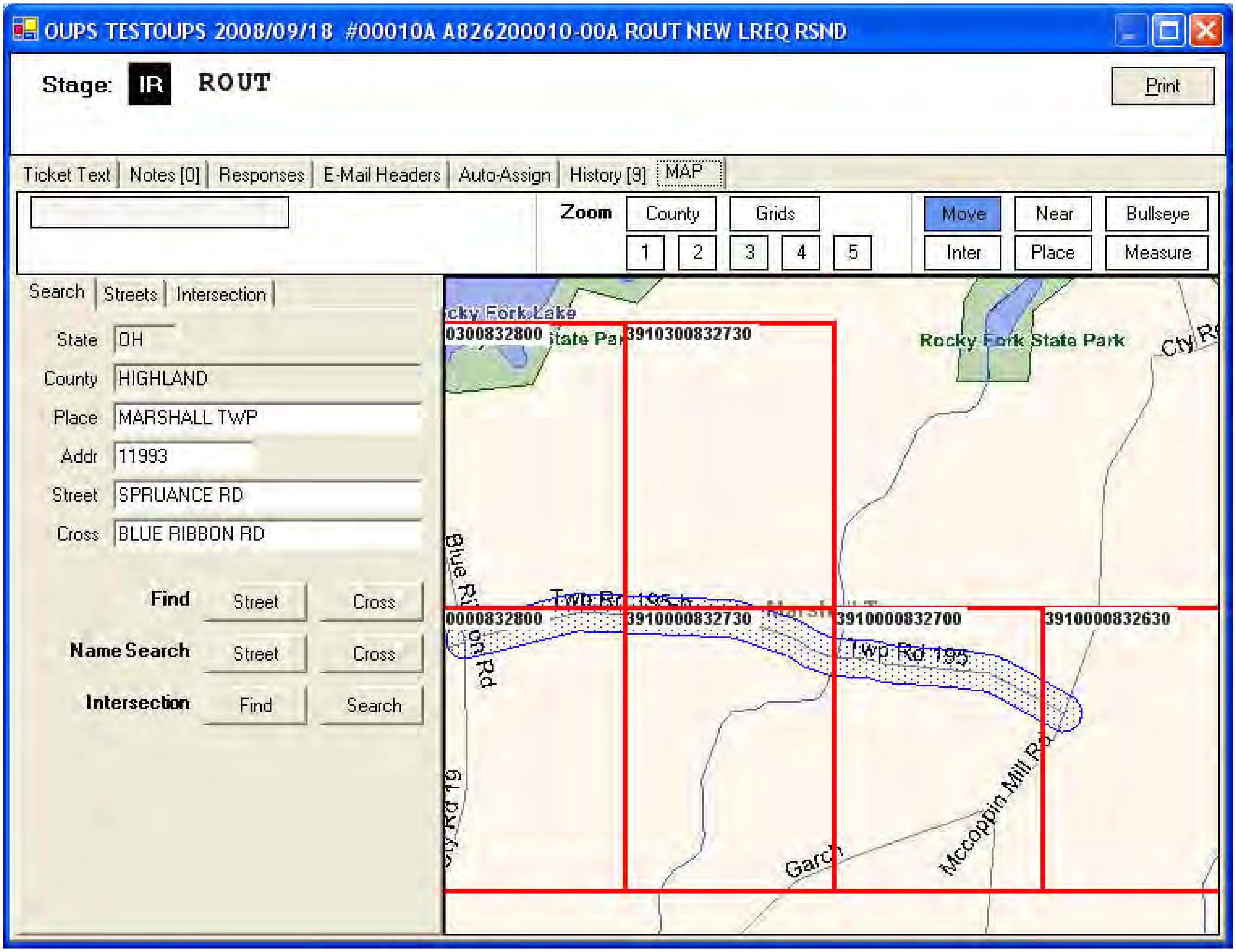
History

The History tab displays a history of the ticket, including who has viewed and printed it.



Map

The Map tab displays the location of the ticket on a map, along with any grid and/or polygon data on the ticket. If the ticket could not be geo-coded (street not found and no grids or polygon on the ticket), then the initial view will zoom to the county level.



County - Zoom to the full county view

Grids - Zoom to the ticket grids.

1, 2, 3, 4, 5 - Sets the zoom level between 1 (zoomed in) and 5 (zoomed out).

Move - This mode is for moving around the map with the mouse. Clicking a point on the map will re-center the map display at that point. To zoom into an area, click and hold the mouse at one point, and move the mouse to create a zoom box. Using your left mouse button will zoom into that area. Using the right mouse button will zoom out.

Near - This mode allows you to identify streets on the map. You must be at zoom level 5 or closer. Clicking near a road will display the feature name, place name and address attributes and highlight the feature identified using yellow.

Place - This mode allows you to click on the map and identify the current Place you are in. The lower-left corner of the window will display the place name found and it will be highlighted on the map display.

Inter - This mode will allow you to click on a road and display all the street intersection. Intersections will be listed on the left in the "Intersections" tab and will be highlighted on the map.

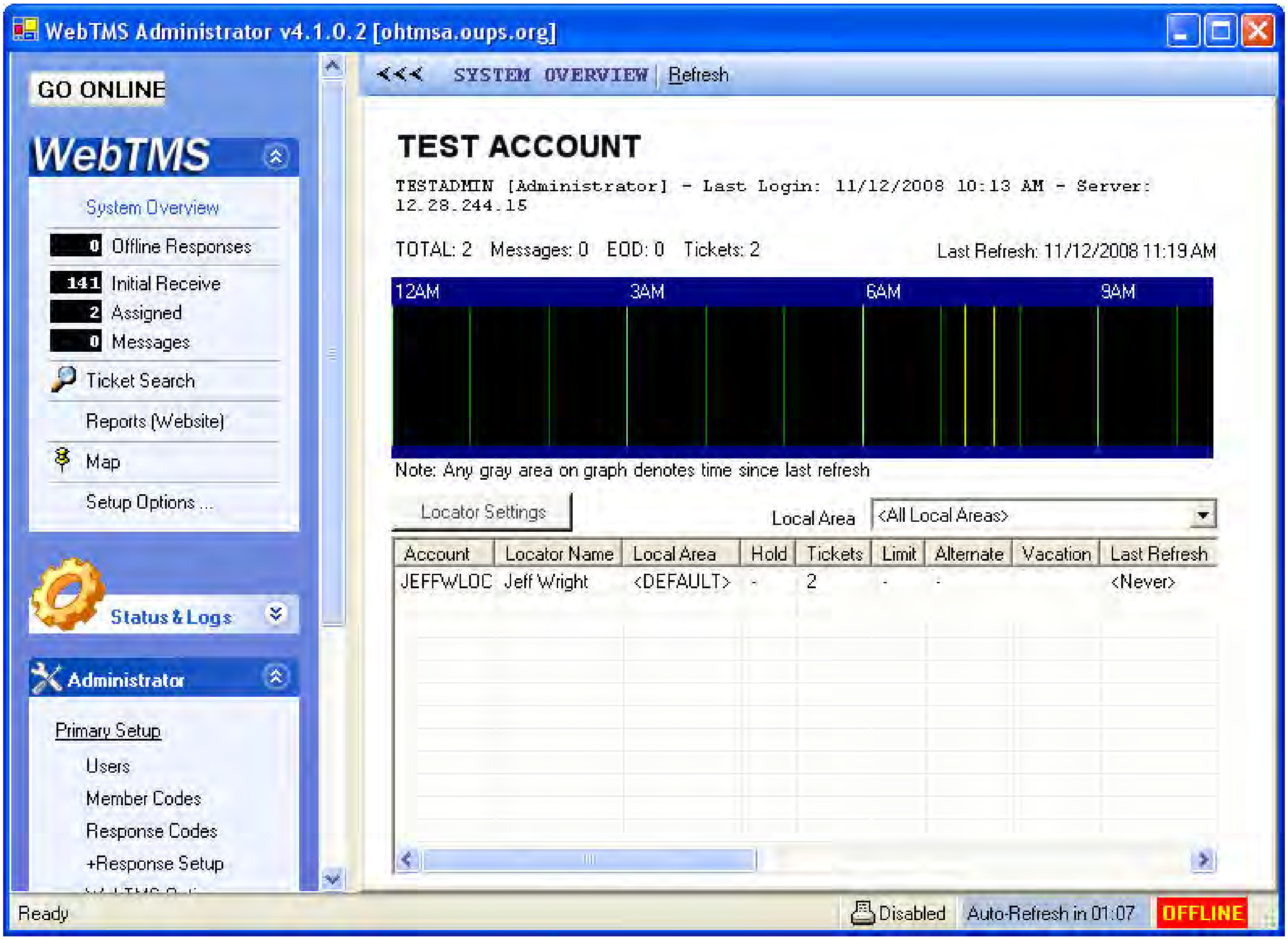
Measure - This mode is to measure distance on the map. Click the starting point on the map and then double-click the ending point. You can left-click multiple times before double-clicking to end the measurement. The measurement distance will be displayed in the status area, in the lower left of the window.

Bullseye **-** This mode will render a 1,000 foot bullseye at the point clicked, at intervals of 100 feet.

Part 6 – Online-Offline Modes

Online/Offline Mode

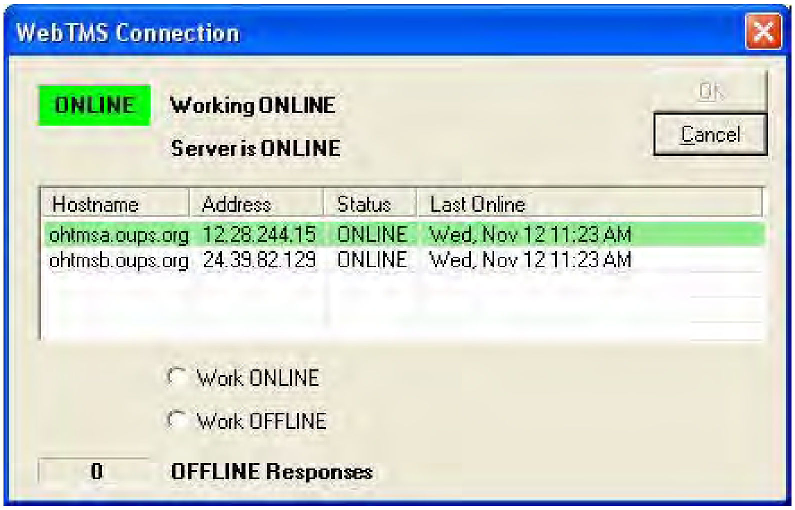
The WebTMS client program supports an offline mode, allowing for input of ticket responses when the connection to the server has been temporarily lost. When offline, the upper-left corner of the user interface will have a button labeled "WORK OFFLINE" or "GO ONLINE", depending on your current connection status. Also, in the lower-right corner of the user interface, you will see "ONLINE" or a red highlighted "OFFLINE" message.



The client program will attempt to monitor the server system(s) and will automatically go into offline mode if it can no longer communicate with the server. Normally the client program will go back into ONLINE mode after it detects that it can communicate with the server. However, the user has the option to force offline mode through the "WORK OFFLINE" button; in this case, the client program will stay offline until the user clicks the "GO ONLINE" button.

WebTMS Connection dialog

The WORK OFFLINE and GO ONLINE buttons will display the following dialog window:

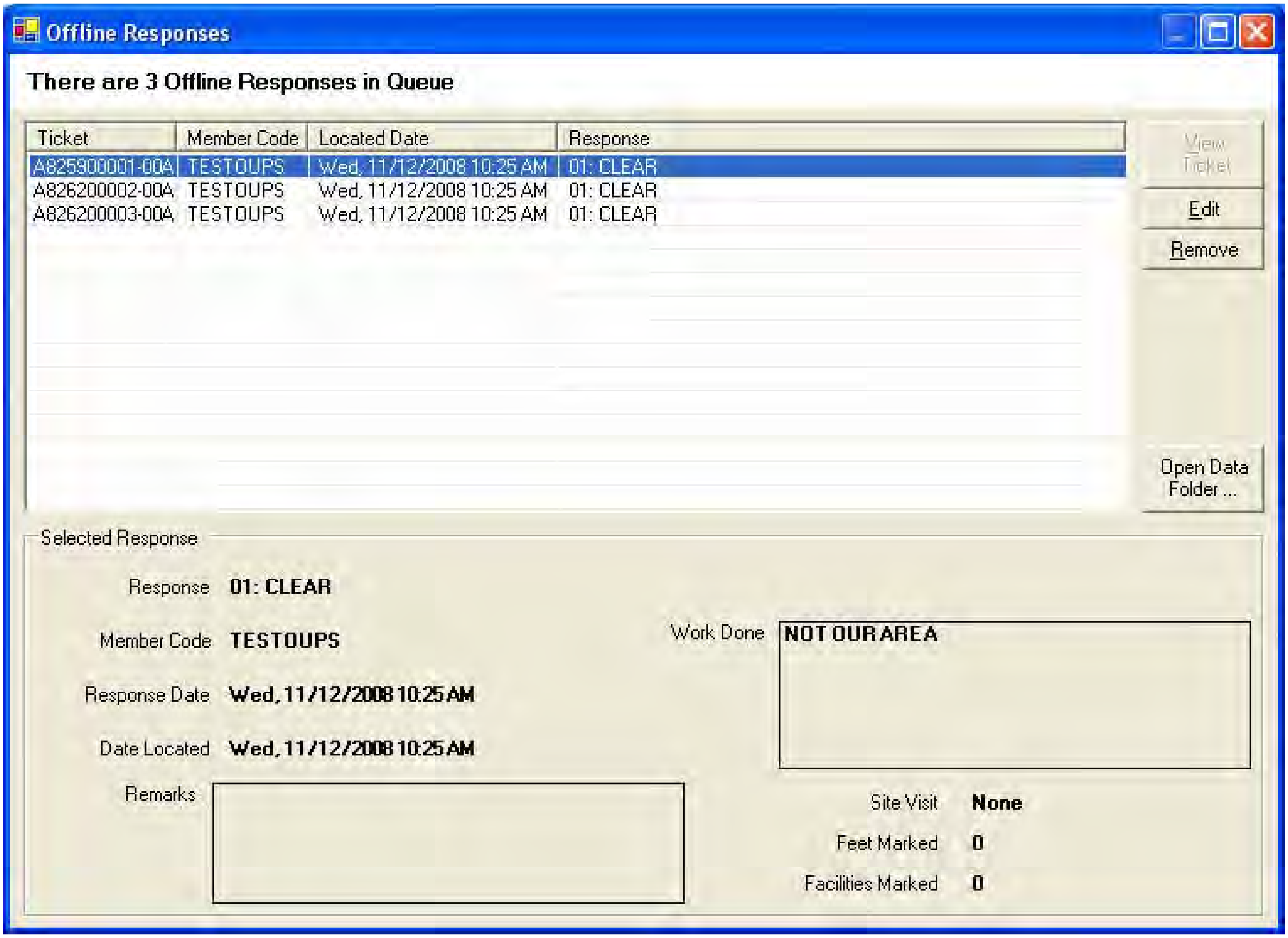


To force OFFLINE mode, select the "Work OFFLINE" option and click OK. To go ONLINE, or to switch servers (in the case there are more than one), simply select the server from the list, select "Work ONLINE" and click OK. The server highlighted in green indicates which server you are currently communicating with. This IP address will also be displayed on the System Overview window.

Part 7 – Offline Responses

Offline Responses

When the client software is unable to communicate with the server, it can run in offline mode. In this mode, responses are saved locally until a connection with the server can be re-established. In the screenshot below, we have 3 offline responses. These responses can be edited or removed from the offline queue, if needed. Click on a response to highlight it and the bottom area will display more detailed information about the response. Click the Edit button to edit the response, click the Remove button to delete the response.



View Ticket **-** Displays the full text of the ticket selected.

Edit **-** Edits the highlighted offline response.

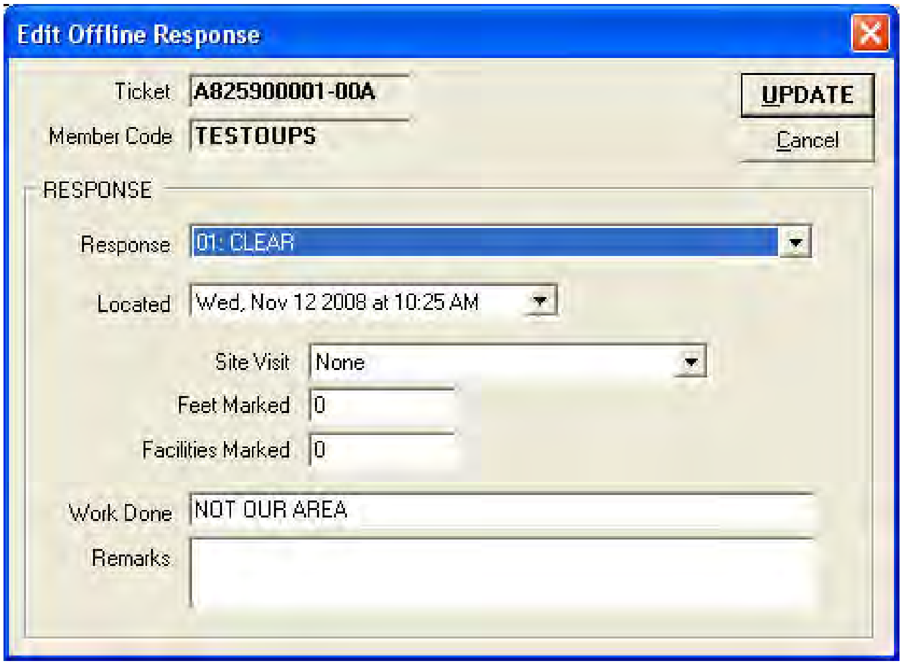
Remove - Deletes the highlighted offline response.

Open Data Folder **-** Opens the temporary application data folder in Windows Explorer. This folder is normally located at ***C:\Documents and Settings\%USERNAME%\Local Settings\Application Data\WebTMS*** where %USERNAME% is your windows account username (not your WebTMS account). This folder contains cached mapping data, application state, offline responses, etc.

Edit Offline Response

To edit an offline response, highlight the response and click Edit to display the Edit Offline Response dialog window.

In this window you can update the response to post and any other response data. Note the extra data input field (Site Visit, Feet Marked, Facilities Marked) are optional input fields that can be controlled from the WebTMS Options, on the Response Data tab.

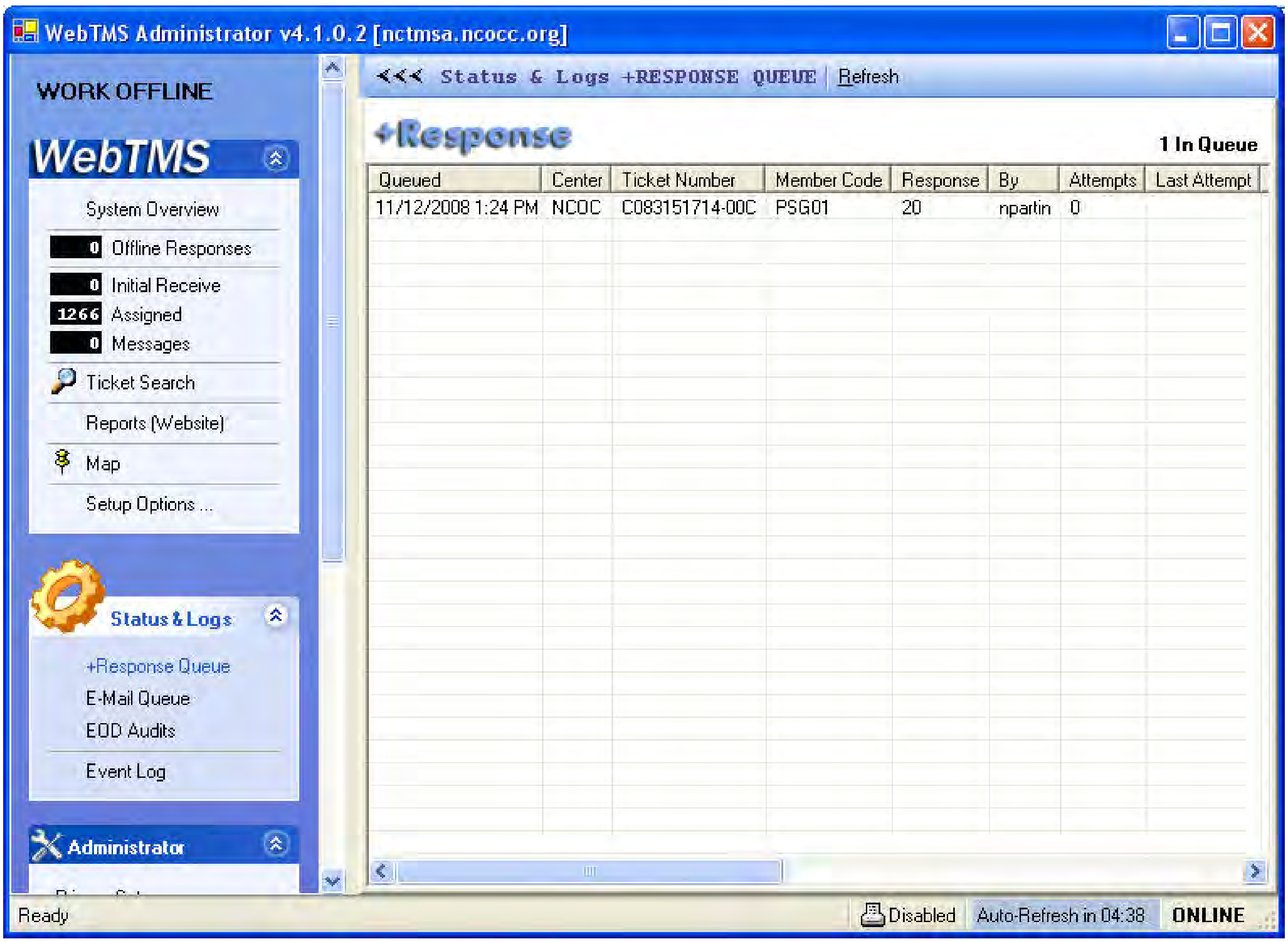


Part 8 – Status and Logs

Status And Logs

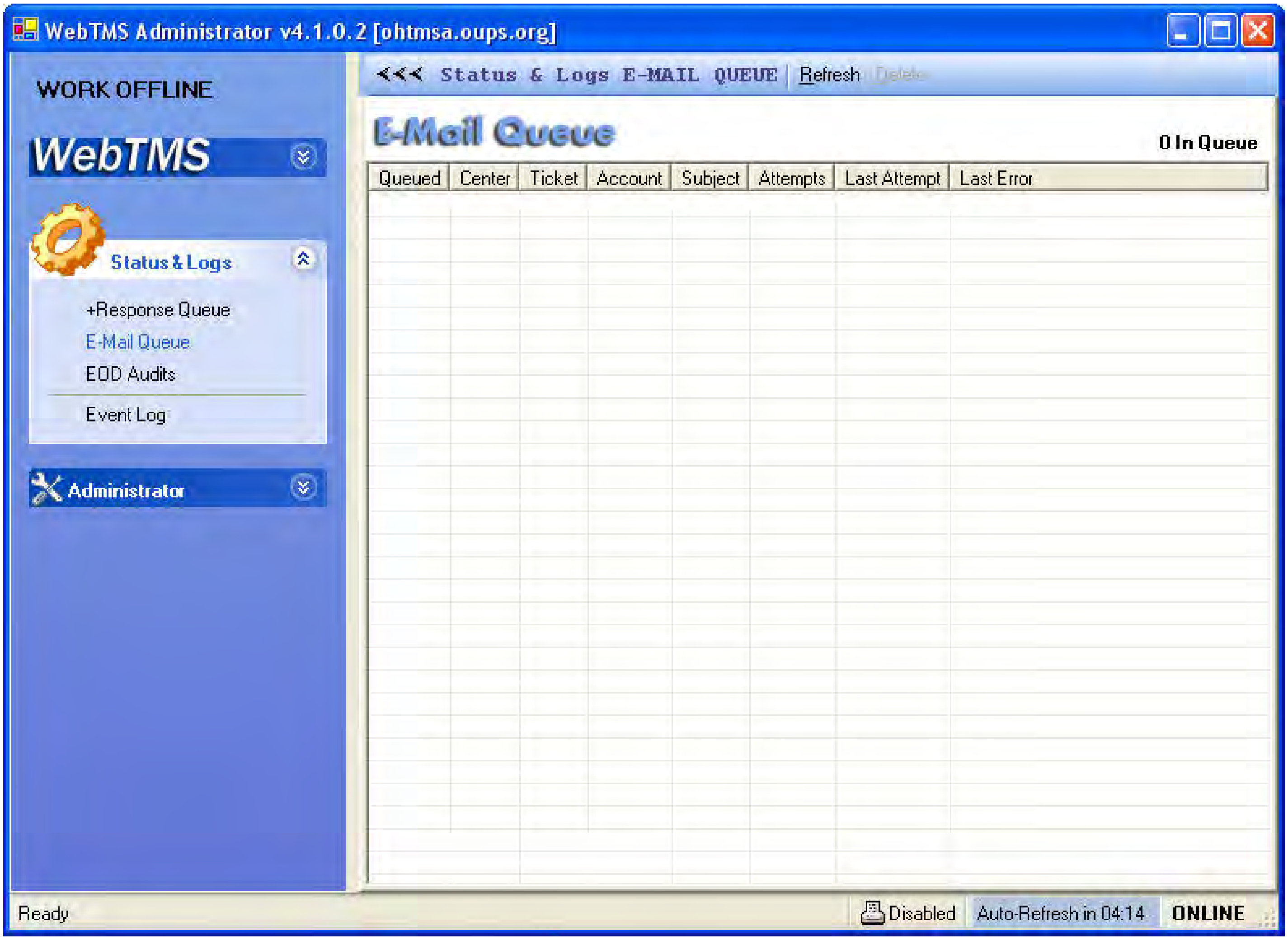
+Response Queue

The +Response Queue will list any responses pending delivery to the One-Call center. Generally this window will be empty. If there are delivery problems, or no Positive Response mapping has been defined, the will be displayed here.



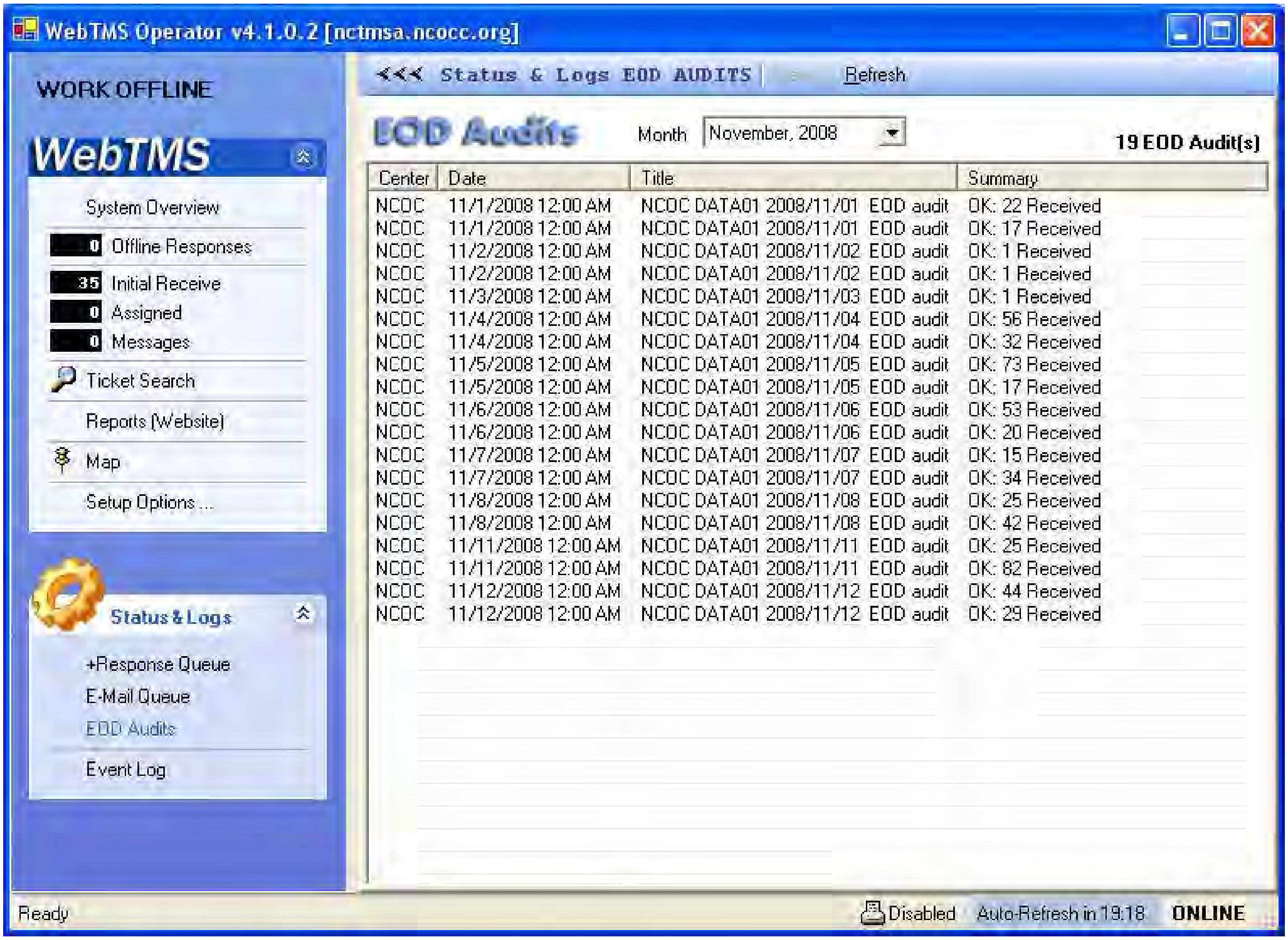
E-Mail Queue

The E-Mail Queue will list any pending e-mails in queue for delivery. Generally this window will be empty. If there are delivery problems the will be displayed here. If an unwanted entry exists, you can highlight it and click the "Delete" menu item.

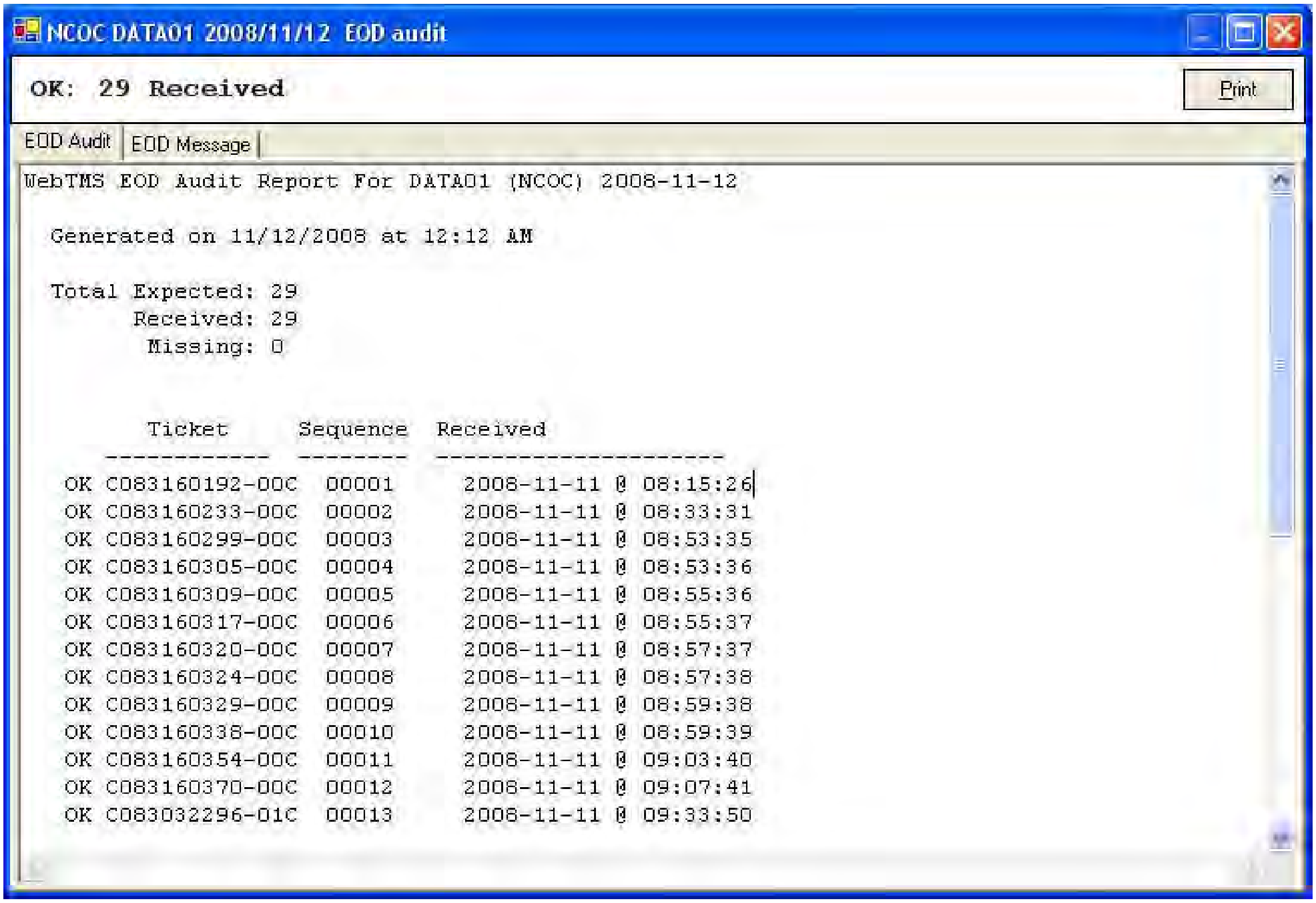


EOD Audits

This window will display EOD audits from the One-Call center along with the generated WebTMS audit, which verifies that all tickets were received.

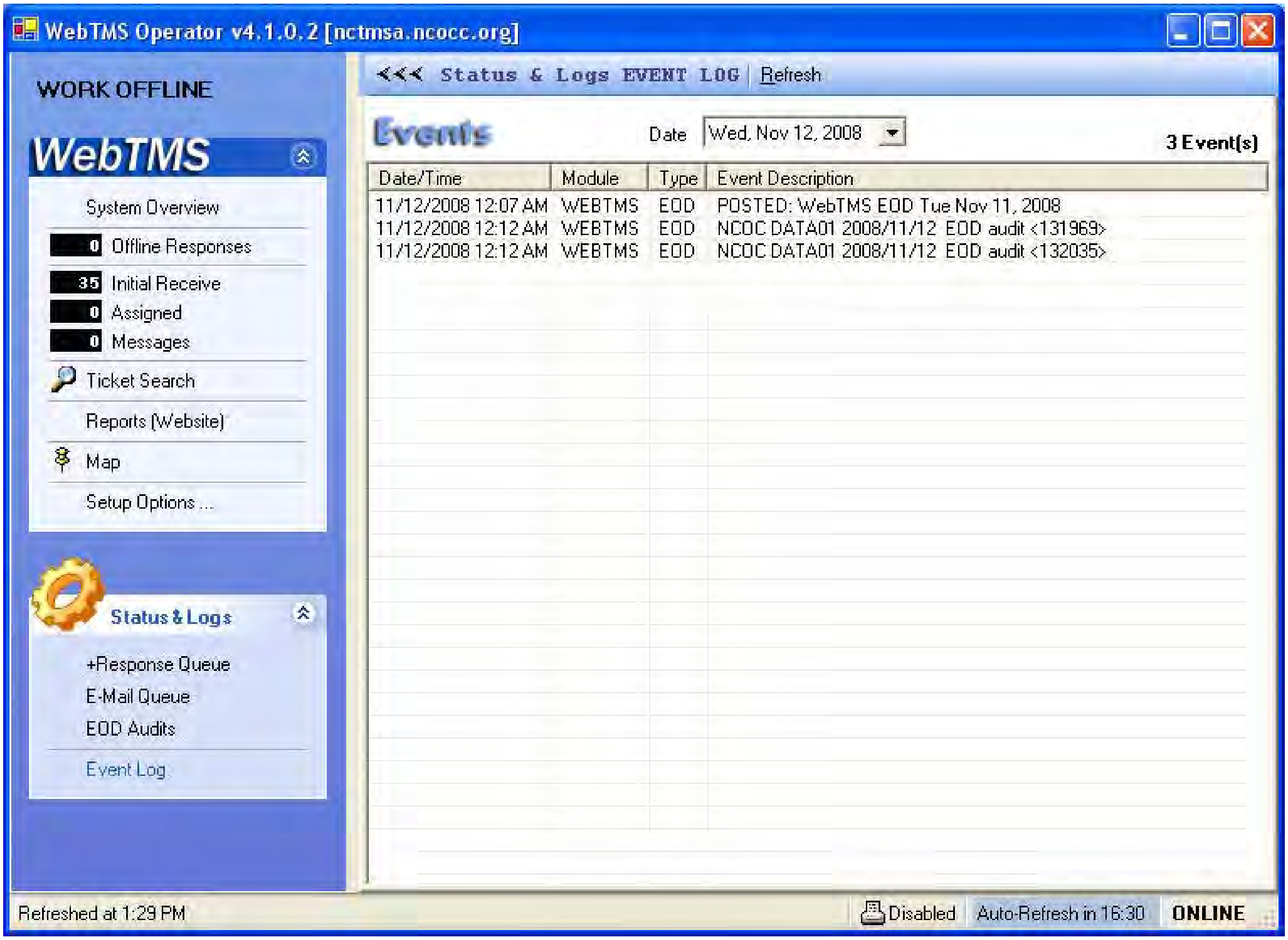


To view an EOD, simply double-click the entry or select it and click the View button.



Event Log

The Event Log will display configuration and WebTMS system events. The Date control will allow you to view the event log for previous days.

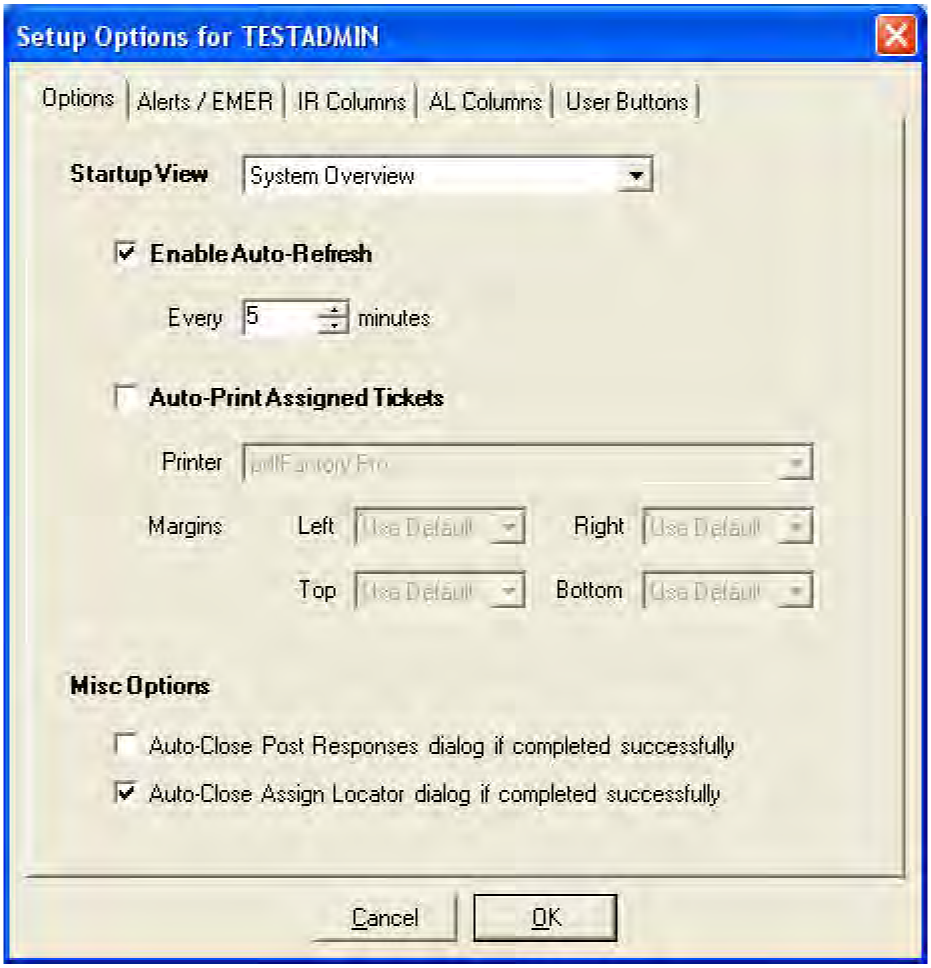

WebTMS Operator v4.1.0.2 [nctmsa.ncocc.org]
WORK OFFLINE
WebTMS
System Overview
0 Offline Responses
35 Initial Receive
0 Assigned
0 Messages
Ticket Search
Reports (Website)
Map
Setup Options ...
Status & Logs
+Response Queue
E-Mail Queue
EOD Audits
Event Log
<<< Status & Logs EVENT LOG | Refresh
Events
Date Wed, Nov 12, 2008
3 Event(s)
Date/Time Module Type Event Description
11/12/2008 12:07 AM WEBTMS EOD POSTED: WebTMS EOD Tue Nov 11, 2008
11/12/2008 12:12 AM WEBTMS EOD NCOC DATA01 2008/11/12 EOD audit <131969>
11/12/2008 12:12 AM WEBTMS EOD NCOC DATA01 2008/11/12 EOD audit <132035>
Refreshed at 1:29 PM
Disabled
Auto-Refresh in 16:30
ONLINE

Part 9 – User-Specific Setup Options

Setup Options

The Setup Options allow you to specify user-specific options.

Options



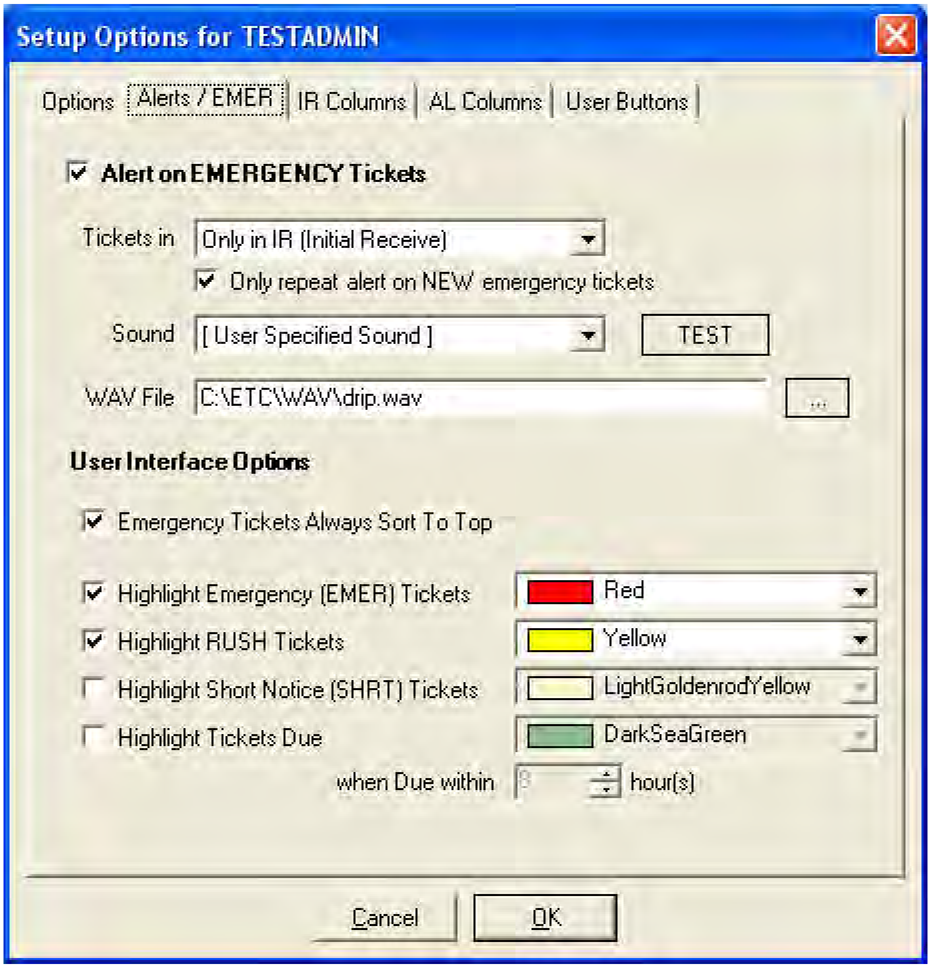
Startup View - This option lets you specify the initial window to display when you run WebTMS client program. Choices are the System Overview, Initial Receive or Assigned screens.

Enable Auto-Refresh - This option will cause the client program to automatically check the server and refresh it's view of the tickets. Without this option enabled, you must manually click the "Refresh" button in either the System Overview, Initial Receive or Assigned screens. If this option is set, the bottom status area of the main window will show the current auto-refresh status and time.

Auto-Print Assigned Tickets - This option allows you to automatically print tickets that are assigned to a specific printer, with options for setting the page margins.

Auto-Close options - With these options set, the Post Response and Assign to Locator processing windows will auto-close if they complete successfully. This saves you from having to click the close button when it has finished.

Alerts / EMER



Alert on EMERGENCY Tickets - This area lets you define how the client should react to emergency tickets. You can specify where the emergency tickets must originate from (IR, AL or both) and specify a sound to play.

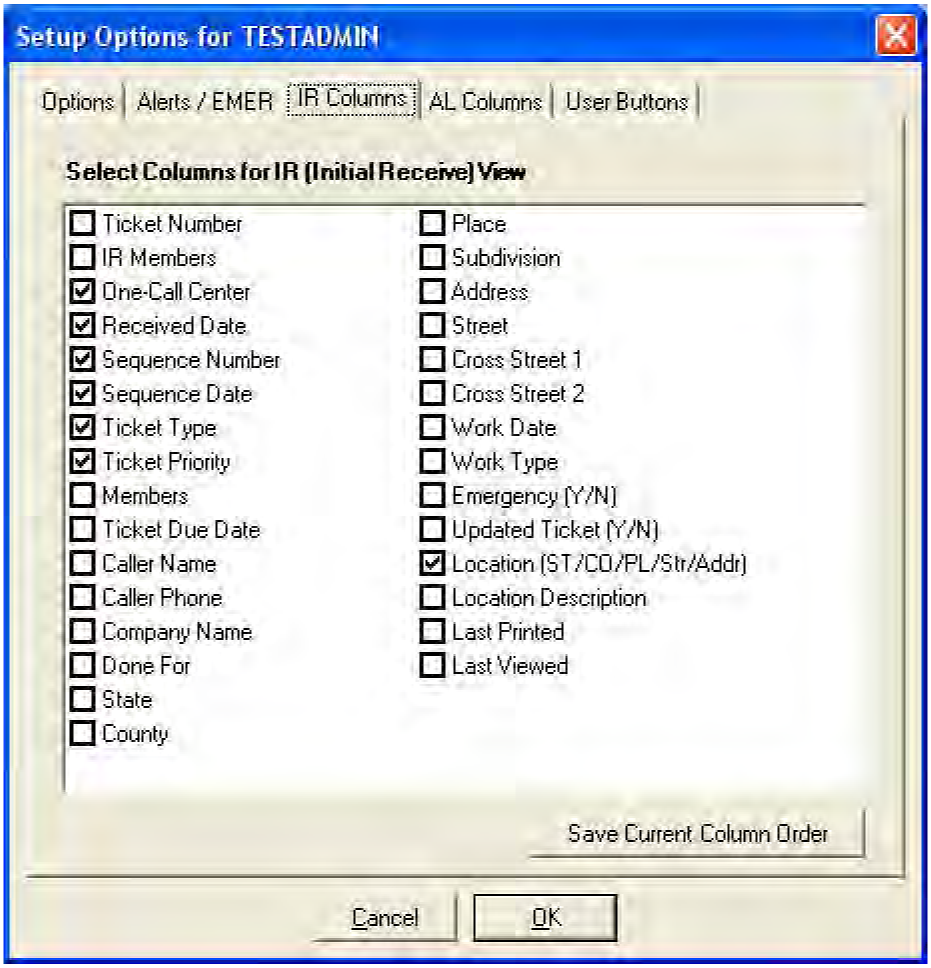
Only repeat alert on NEW emergency tickets - If set, the client will not react to emergency tickets, after a refresh, unless there are new tickets from what has been acknowledged already. Otherwise the audible alert and "Emergency" button display on the main window will recur after each refresh in which there are *any* emergency tickets.

Emergency Tickets Always Sort to Top - if set, then emergencies will appear at the top of the ticket lists in Initial Receive (IR) view and Assigned to Locator (AL) view.

Colors - Select the ticket types and colors you wish to see them highlighted in the Initial Receive (IR) and Assigned to Locator (AL) views.

IR Columns

The Initial Receive (IR) view allows you to customize the columns you see and what order they appear in. On this tab, select the columns you wish to see in Initial Receive. Changing this will cause the column order to be reset. Once you select your columns, close this settings window and go to Initial Receive and re-order the columns by clicking and dragging the headers. Then open this setting dialog again and click the ***Save Current Column Order*** button to save the ordering of the columns in Initial Receive.

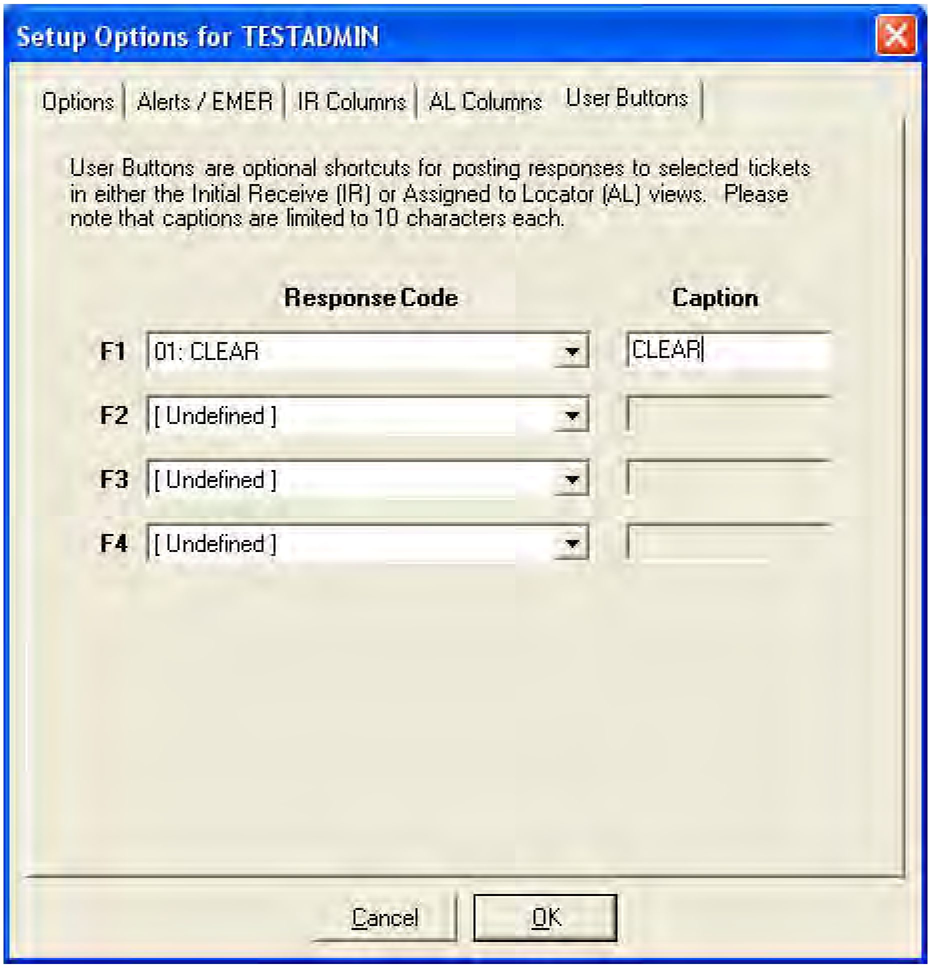


AL Columns

This is the same as the IR Columns view above, except to applies to the Assigned to Locator (AL) view window.

User Buttons

Use buttons allow the user to associate the F1, F2, F3 and F4 keys with response codes. This allows users a shortcut for commonly used codes. These shortcuts can be used in Initial Receive, Assigned to Locator views. Select a response code and then enter a short caption for the button.

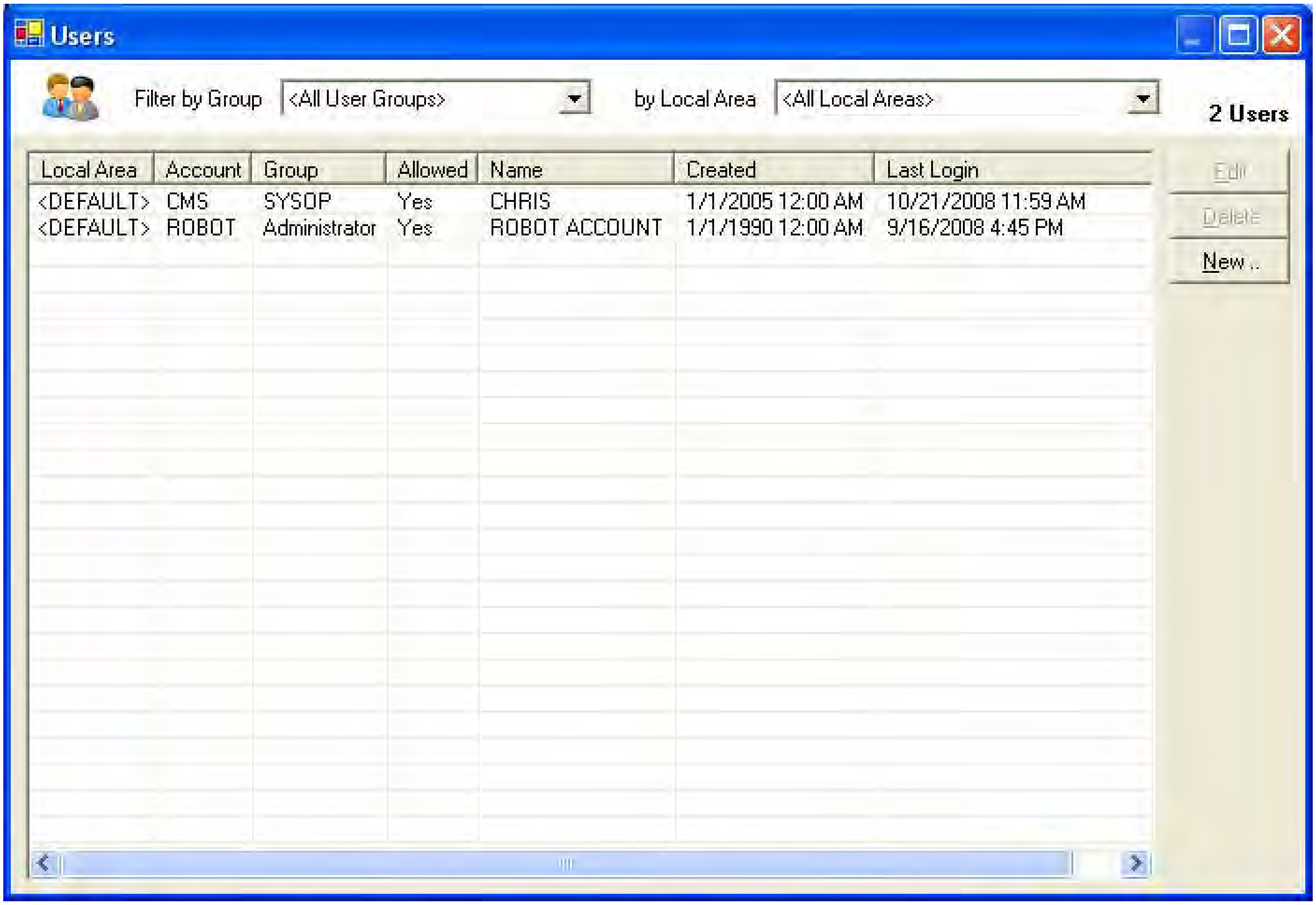

Setup Options for TESTADMIN
Options
Alerts / EMER
IR Columns
AL Columns
User Buttons
User Buttons are optional shortcuts for posting responses to selected tickets in either the Initial Receive (IR) or Assigned to Locator (AL) views. Please note that captions are limited to 10 characters each.
Response Code
Caption
F1
01: CLEAR
CLEAR
F2
[Undefined]
F3
[Undefined]
F4
[Undefined]
Cancel
OK

Part 10 – Administrative Tasks

- Users
- Member Codes
- Response Codes
- +Response Codes And Mapping
- WebTMS Options
- Auto-Complete Rules
- Local Areas
- Locator Auto-Assign

Users

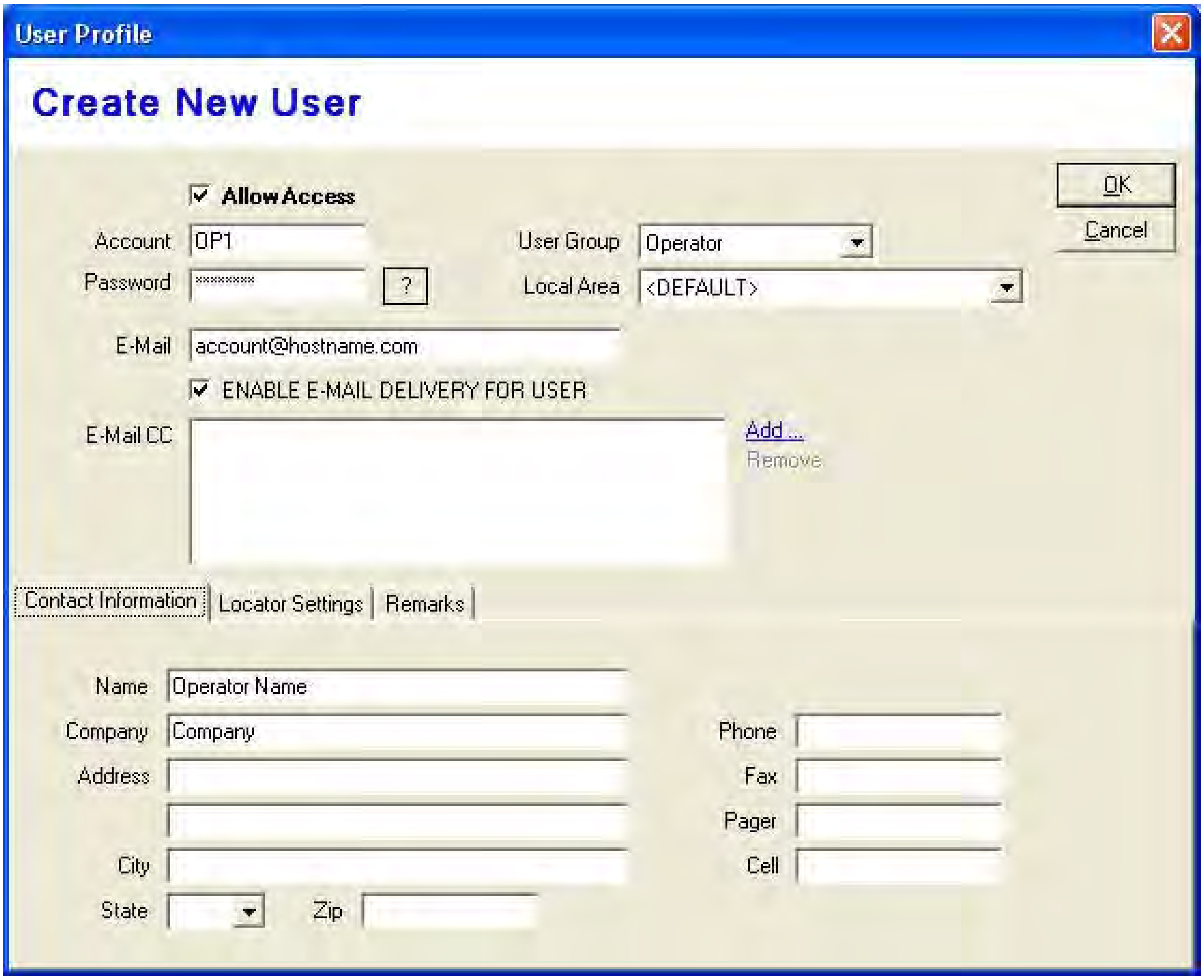
The Users windows allows administrators to define user accounts for other WebTMS users in their company. There are three account types: Administrators, Operators and Locators. Administrators and Operators are generally the same except only Administrators have access to the Administrator menu items. Locators generally have the least overall functionality, as they can view and respond to only their own tickets.



At the top of the Users screen you can limit the user list using the "Filter by Group" or "by Local Area". Otherwise you may click the "New" button to create a new user account or can highlight an existing account and click the "Edit" or "Delete" button. Note that you will not be allowed to delete Locator accounts if they have any open tickets assigned to them.

Creating A User Account

To create a new account, click the "New .." button. This will bring up the user properties dialog window:



Allow Access - Use this option to enable or disable the account.

Account - Enter an account name. This is the account name the user will use to log into WebTMS.

Password - Enter a password for the account. The question-mark button will display the password entered, but it will be hidden by default.

User Group - Select the user group of "Administrator", "Operator" or "Locator".

Local Area - Select a local area if you have any defined. In most cases this is not used.

E-Mail - Enter a valid e-mail address for this user.

ENABLE E-MAIL DELIVERY FOR USER - Un-checking this option will prevent WebTMS from sending any email to this user. If this option is checked, then please be sure to enter a working email delivery address.

E-Mail CC - In this area you may include more e-mail addresses for delivery. Whenever an email is delivered to this user, a copy will be sent to any email addresses in this field.

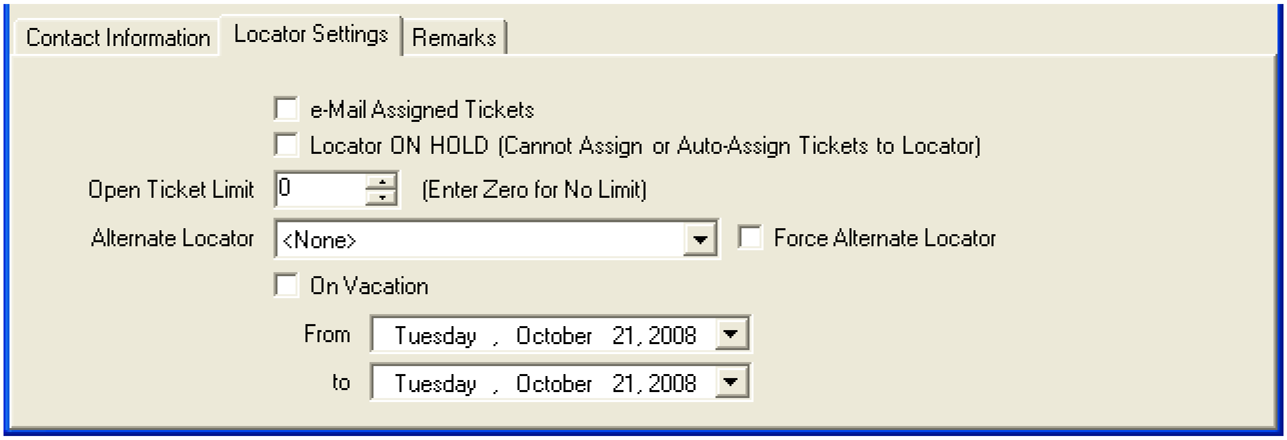
Contact Information - Use this area to include any detail information on the user. You do not need to populate all the fields, but you should at least populate the Name field with something meaningful.

Locator Settings - This tab is for special locator-only settings and will be disabled if the account is not a locator account. See below for more information on the Locator Settings area.

Remarks - This tab simply contains a text area where notes can be entered and saved.

LOCATOR SETTINGS

The Locator Settings area is for specifying information specific to locator accounts.



e-Mail Assigned Tickets - If this option is checked, then all tickets assigned to this locator will be emailed to the accounts e-mail account (unless the "ENABLE E-MAIL DELIVERY FOR USER" has been unchecked, which will override this setting.) In general, this option would not be checked. Locator accounts will normally run the WebTMS client application to view and respond to their tickets.

Locator ON HOLD - This option allows you to put the locator account on hold, as far as ticket assignments are concerned. If checked, then this account will no longer participate in the Auto-Assign process and generally cannot have tickets manually assigned to them. (There is a specific option in the manual assign process to override this setting.)

Open Ticket Limit - This is the maximum number of tickets the locator can have open at any one time. During either Auto-Assign or manual ticket assignment, if the locator reaches their limit then tickets will no longer be assign to them. In the case of Auto-Assignment, the Alternate Locator would be next in line (if specified), otherwise the auto-assign rules would continue to find a locator for the ticket. The default is zero, meaning there is no limit to the number of tickets the locator may have open.

Alternate Locator - This field allows you to specify a different locator to receive tickets in the event this locator cannot receive them (On Hold, Ticket Limit reached, or On vacation.) If you specify an alternate locator, then manual assignment of tickets to this user that might normally fail (on hold, vacation, limit reached) will go to the alternate locator.

Force Alternate Locator - This option comes into play during the auto-assign process. If this option is set, and a ticket would normally be assigned to this locator, then the ticket will be redirected to the alternate locator. Note that the same rules will apply to the alternate locator (they may have an alternate, be on hold, etc.) and the process may continue until a locator is found or there is no one left to assign the ticket to.

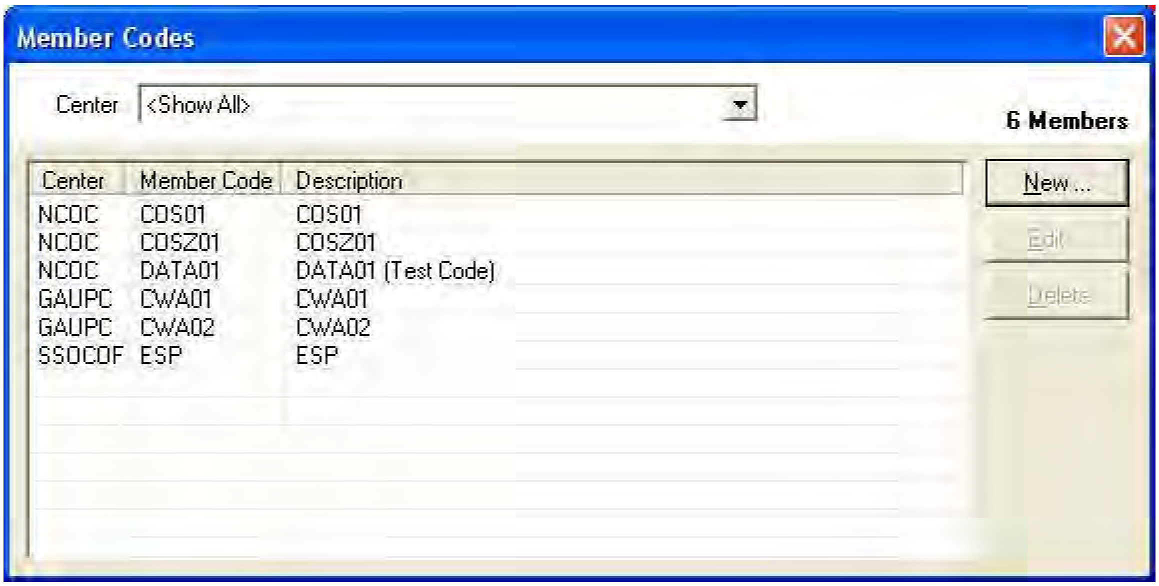
On Vacation - This option allows you to specify a vacation date range. The net effect is that the locator will be treated as being on hold during this date range.

Editing A User Account

Generally, editing a user account is similar to (and uses the same dialog as) creating a new user account. There are some limits, however. First, you cannot change the account name used. Second, changing the account type from Locator to either Operator or Administrator will fail if the locator has any open tickets assigned to them. You must first re-assign them to another locator or close them out.

Member Codes

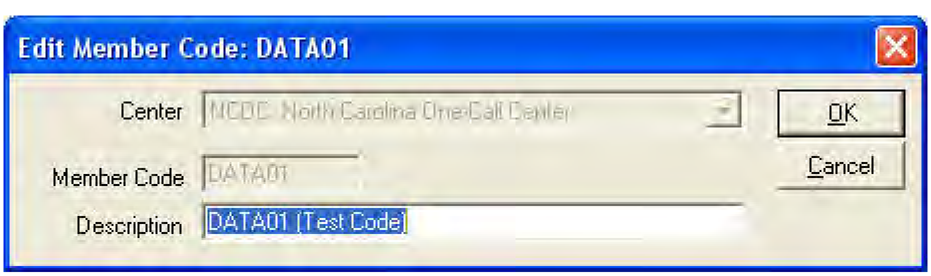
This setup screen defines what member codes you receive for. Generally this screen will be populated for you, with your member codes, during your initial WebTMS setup. If you are going to start receiving for a new member code, or you will stop receiving/handling a member code already on this screen, then this is where you must manage them. When a ticket is received by the WebTMS system, it will look at this list of member codes to determine which you are responsible for. For each member code on the ticket you are responsible for, there will be a corresponding response entry created. So it is important to keep this list accurate.



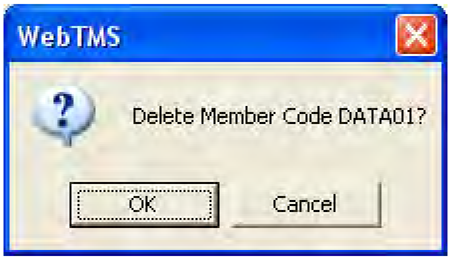
To add a new member code to the list, simply click the "New ..." button to bring up the New Member Code dialog:

Specify the center and member code and enter a description for the member code (often this is simply the member code itself.)

The "Edit ..." button allows you to modify the description only:



The "Delete" button allows you to delete the member code from the list. Note that this will NOT delete tickets or response data for this member code, but it will prevent WebTMS from recognizing you as being responsible for that member code on the ticket and will no longer create Response entries for those codes.



Response Codes

Response Codes are the codes used for responding to tickets. These codes are internal to the WebTMS system and can be expanded to meet your needs. A response code, besides having a specific description, has two distinct properties. The first property is the "completes" property. This determines if the response will close the ticket (or the specific member on the ticket being responded for, in the case where you have multiple members on the ticket.) Generally response codes will complete a ticket, however a response code that indicates an ongoing job could be an exception. A ticket is completed when all members on the ticket that you are responsible for have a response posted, and all the responses have the property "completes" set to True/Yes. If any response on the ticket does not complete the ticket, then the ticket will stay open and on-screen.

The second property of a response code is the Positive Response mapping. For centers which have a positive response system, you must map the response codes in WebTMS into codes used for Positive Response. See the section on +Response Codes and Mapping for more information.

Note that the call center may provide a default set of response codes, and it may be that these codes will be static. These default codes would be identical to the Positive Response codes (and would be a 1-to-1 mapping in the +Response setup.) If this is the case, then you may not be able to modify them. However, you can still add your own new codes.

To add a new response code for use with WebTMS, click the "New ..." button and enter the code and description and whether this code will complete the ticket (usually yes).

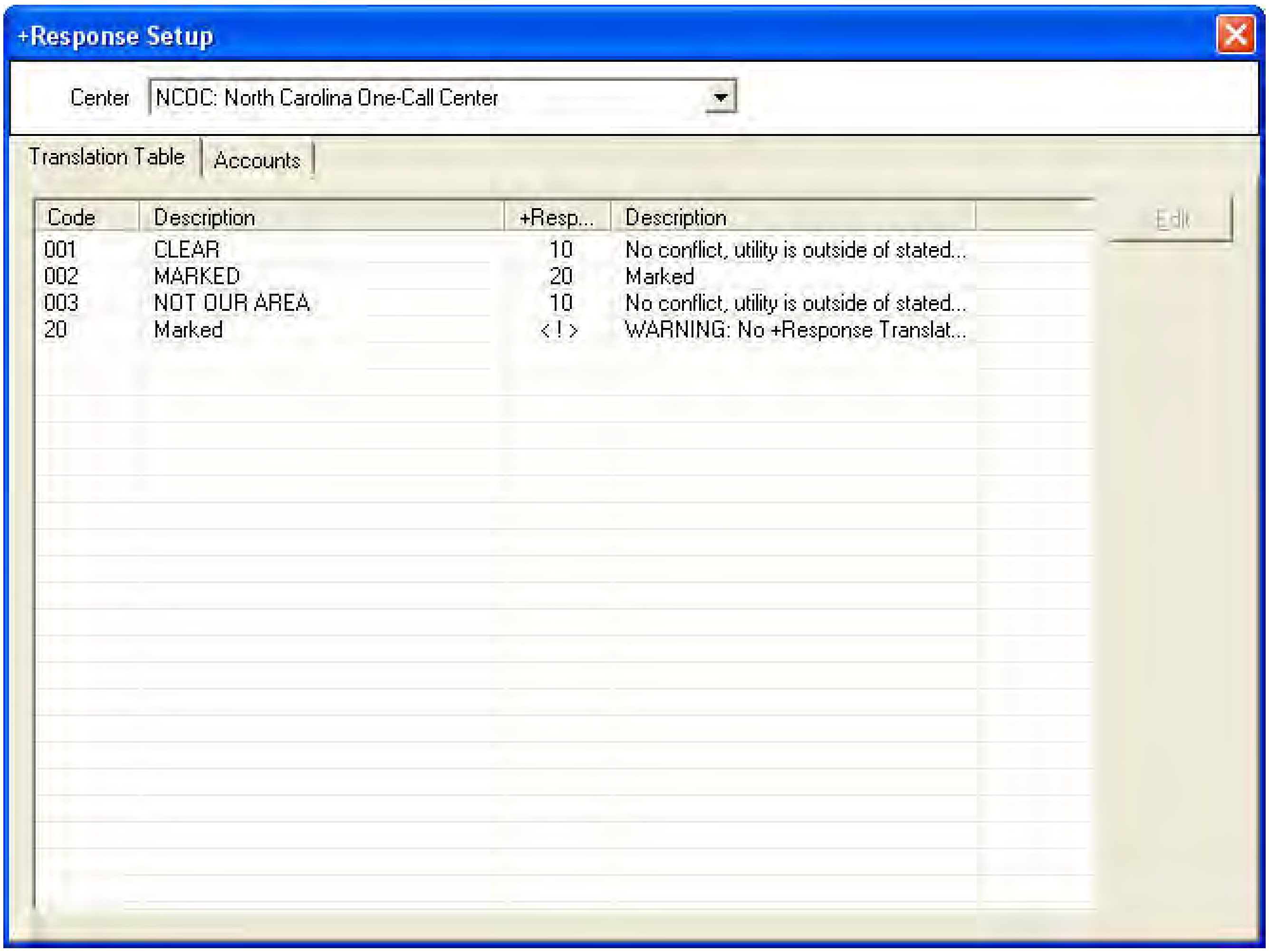
The "Edit ..." button allows you to modify the description and completes flag only. You cannot change the actual code used.

The "Delete" will delete the code from the list of available response codes. Static response codes may be setup by the call center, which are read-only. If that is the case, you will get a warning message when you try to delete them.

+Response Codes and Mapping

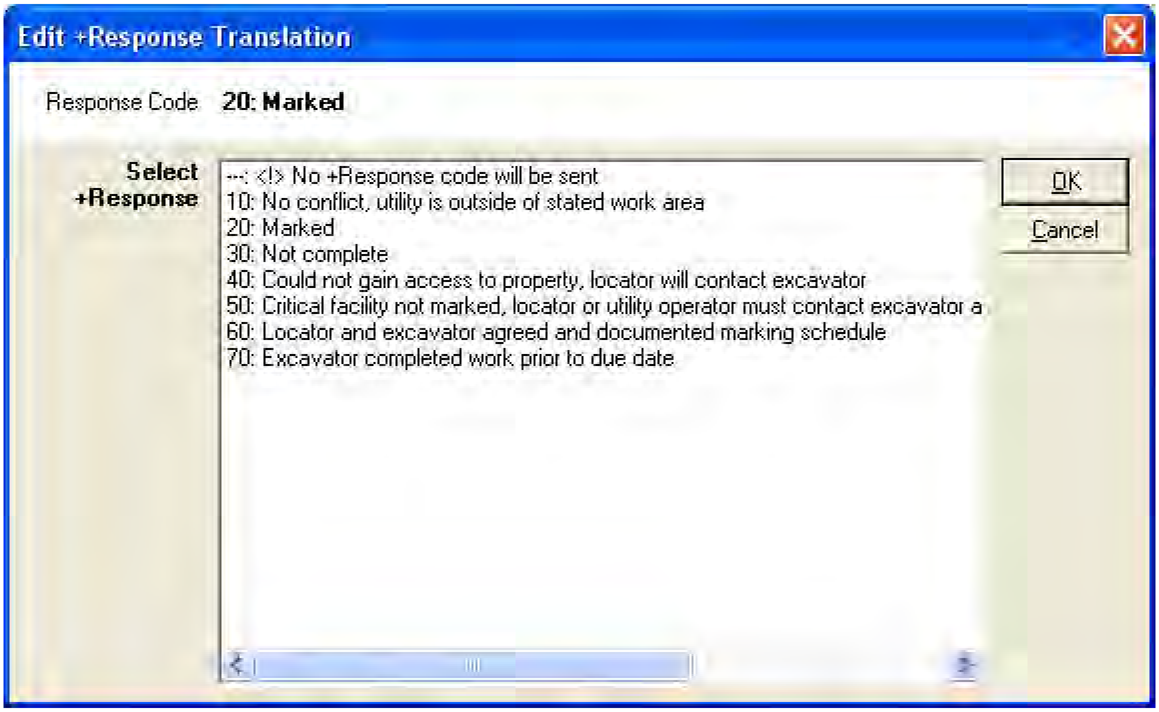
Positive Response codes are codes that are automatically sent to the call center when you respond to a ticket within WebTMS. In order to facilitate the use of user-defined response codes, you must define how response code are mapped to call center positive response codes. When your profile is initially created, you may be provided with a default set of response codes which map directly to the call centers Positive Response codes. In addition, these codes may be static (you will not be allowed to modify or delete them.)

The +Response Setup window allows you modify how response codes are mapped to Positive Response codes. Using the "Center" selection, you must define response code mappings for each center. In most cases, you will be receiving from only one call center.



The "---" +Response Code is used to signal that no positive response should be transmitted to the call center. Otherwise you may select a positive response code from the available list. When you first add a new response code, there will be no mapping, as show in the window above for code "20".

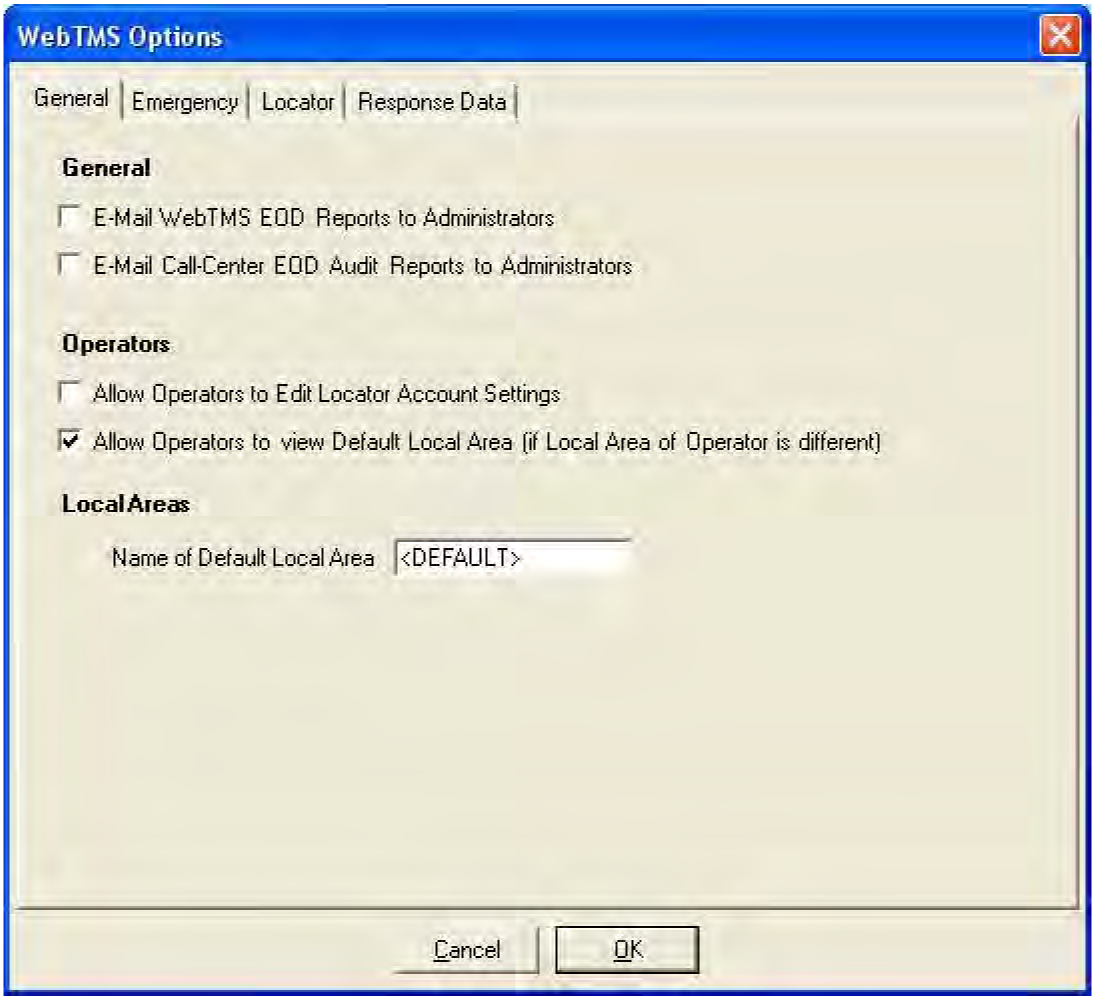
To edit a response mapping, select a response code from the list and click the Edit button. This will display the "Edit +Response Translation" window, which will allow you to select a Positive Response to transmit, or select the "---" +Response code to signal that no response should be transmitted.


Edit +Response Translation
Response Code 20: Marked
Select +Response
---: <!> No +Response code will be sent
10: No conflict, utility is outside of stated work area
20: Marked
30: Not complete
40: Could not gain access to property, locator will contact excavator
50: Critical facility not marked, locator or utility operator must contact excavator a
60: Locator and excavator agreed and documented marking schedule
70: Excavator completed work prior to due date
OK
Cancel

WebTMS Options

The WebTMS Options screen allows you to control some global administrative and usage properties of the application.

General



E-Mail WebTMS EOD Reports to Administrators - if set, then WebTMS end of day reports will be e-mailed to all Administrator accounts.

E-Mail Call-Center EOD Audit Reports to Administrators - if set, then the One-Call center's EOD reports will be e-mailed to all Administrator accounts.

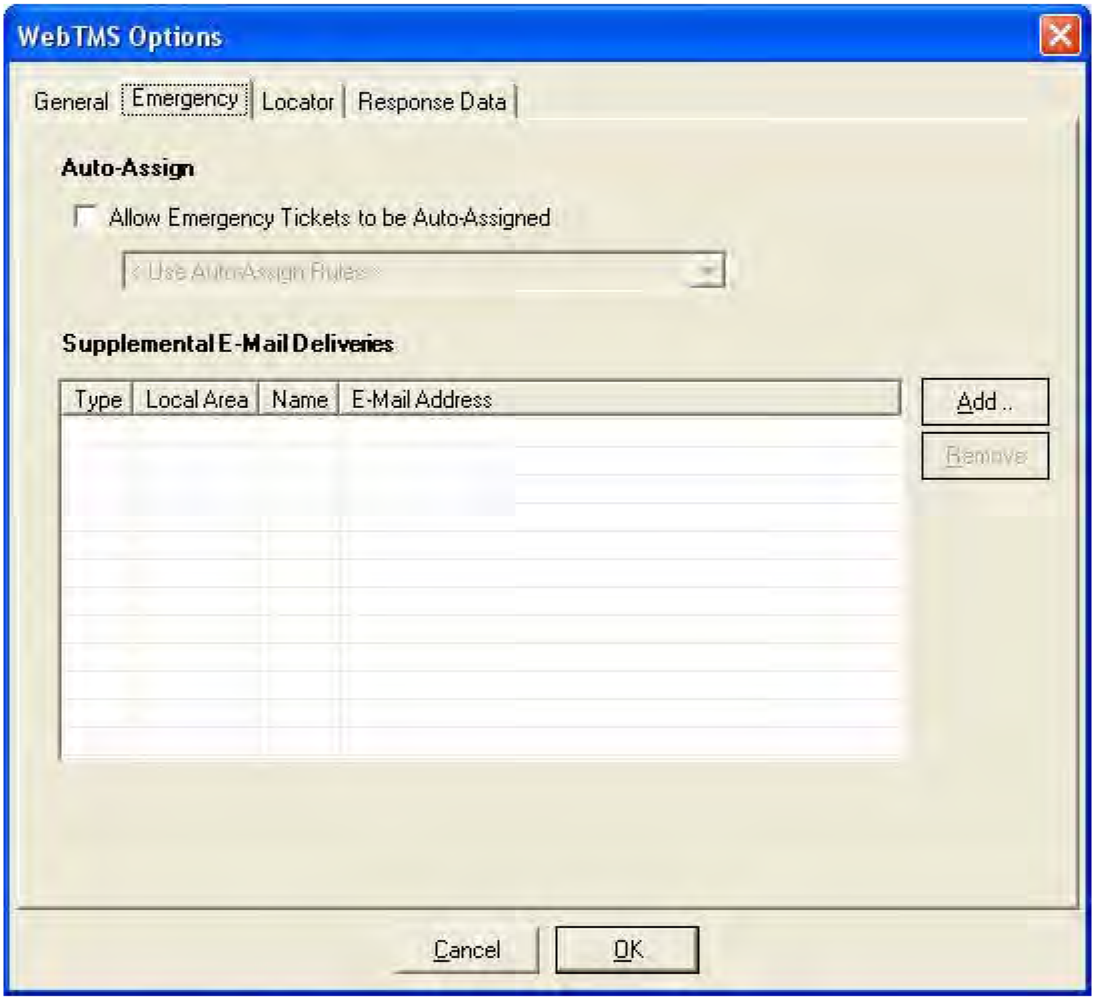
Allow Operators to Edit Locator Account Settings - if set, then Operator accounts will have a "Locators" button on the System Overview screen. They will be allowed to enter User setup (usually reserved for Administrator accounts) and edit Locator accounts. This allows Operator accounts to manage locator properties, such as alternate locator, vacation days, suspend/resume Auto-Assigning, etc.

Allow Operators to view Default Local Area - This option is only used if you are using Local Areas. If a ticket is not assigned a local area, then it is placed into the pre-defined "<Default>" Local Area. Setting this option will allow operators in a defined Local Area to be able to also view the "<Default>" local area;

otherwise they will see tickets in their assigned local area only.

Name of Default Local Area - This allows you to assign the name of the default (unassigned) local area.

Emergency

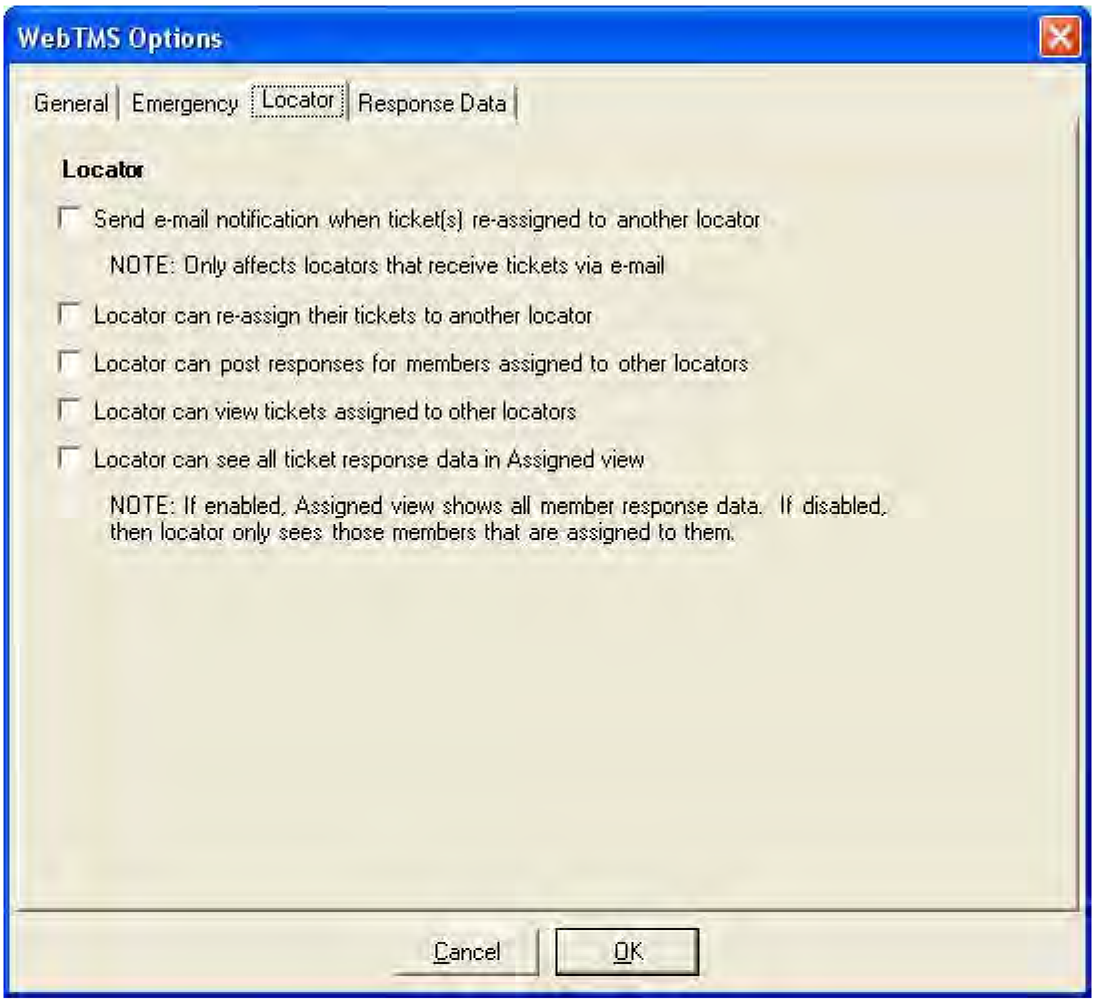


Auto-Assign - This allows you to control how emergency tickets are handled. If this option is turned off, then emergency tickets will go directly to Initial Receive. Turning this option on allows emergency tickets to be Auto-Assigned, and you may control how that is handled by selecting a value from the selection box. The selection box will contain the default option "< Use Auto-Assign Rules >" which means the ticket will flow through the normal auto-assign process (which may in turn have rules for emergency tickets.) Alternatively, you may select any locator account. By doing this, all emergency tickets will be directed to that specific locator, regardless of any auto-assign rules.

Supplemental E-Mail Deliveries - This option allows you to add supplemental e-mail deliveries based certain criteria. Clicking the "Add" button will display the following dialog. Any tickets matching the E-Mail Type and Local Area will be delivered to the E-Mail address specified.

Locator

The Locator tab allows you to define how Locator accounts may behave and interact.



Send e-mail notification when ticket(s) re-assigned to another locator - If set, then an notification e-mail will be queued for delivery to the original locator, informing them that the ticket has been assigned to a different locator. Note that in order for this to have any effect, the original locator must be configured to receive tickets via e-mail (User profile, "Locator Settings" tab, "e-Mail Assigned Tickets" option.)

Locator can re-assign their tickets to another locator - If set, then locator accounts are allowed to re-assign their tickets to another locator. If not set, then locators cannot re-assign their tickets.

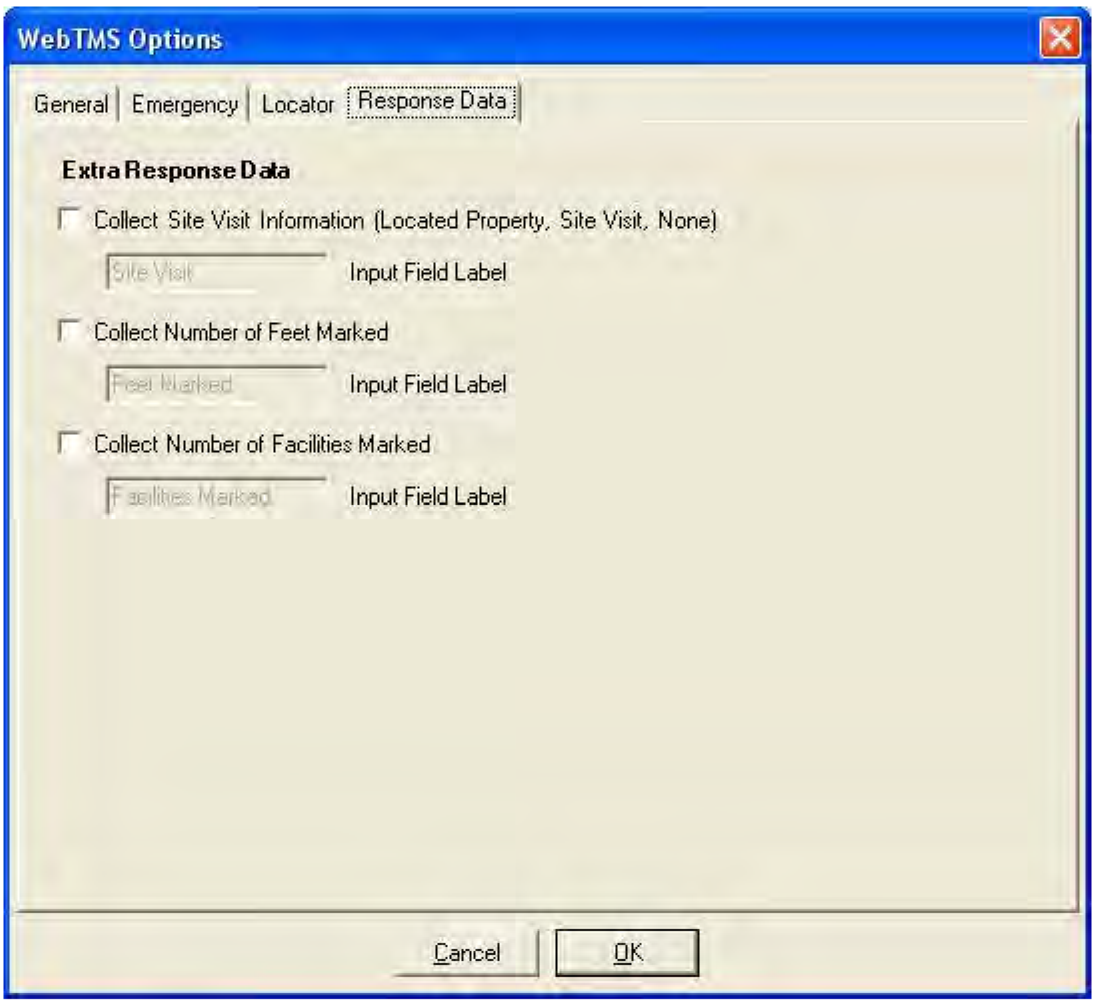
Locator can post responses for members assigned to other locators - This option only goes into effect when there are multiple members on a ticket for which there are locators assigned. If set, then any assigned locator may edit any response on the ticket.

Locator can view tickets assigned to other locators - If set, then locator accounts can view tickets that are assigned to other locators.

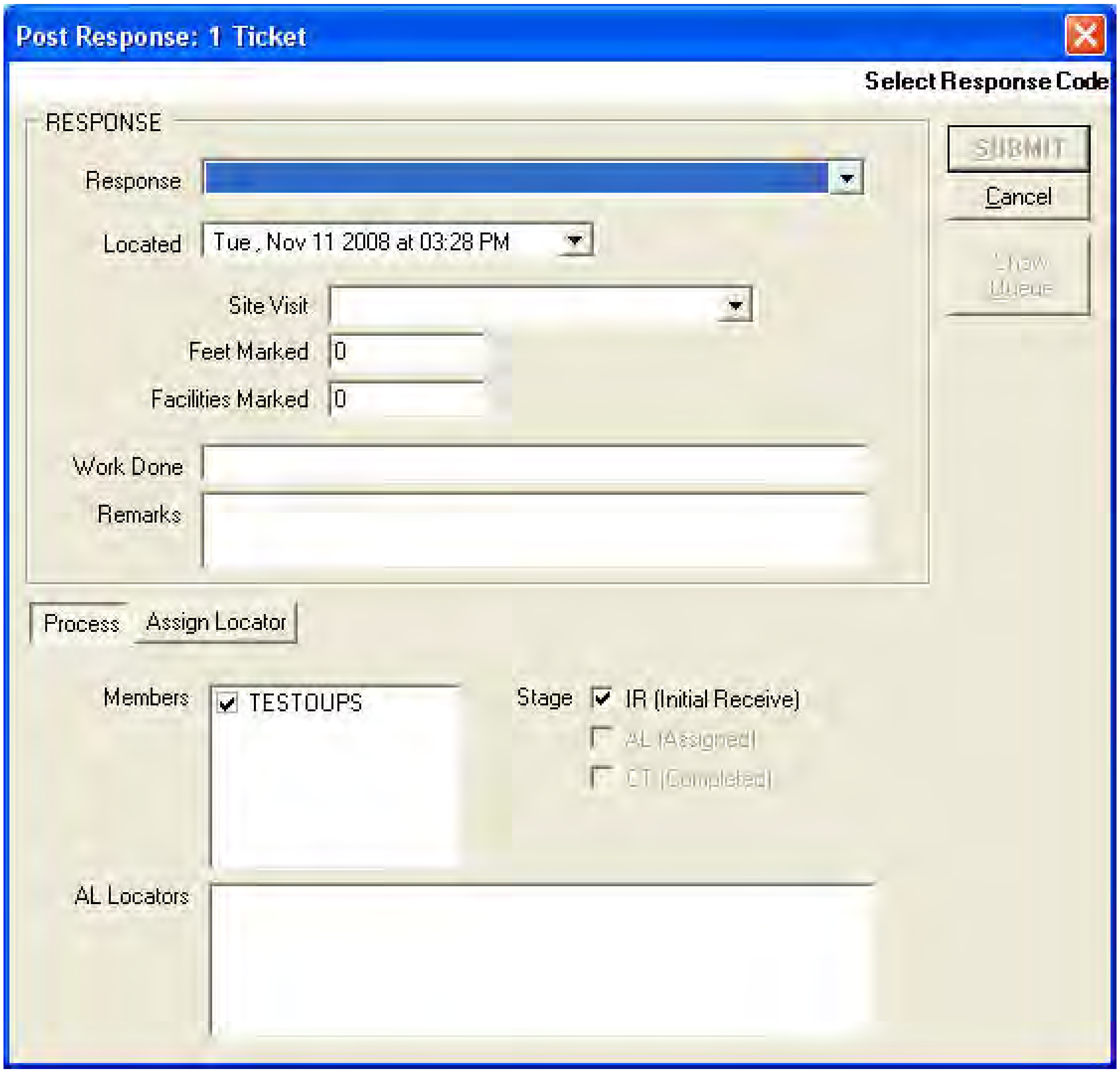
Locator can see all ticket response data in Assigned view - this option only applies when you have more than one member code on a specific ticket. If enabled, then a locator can view response data on the ticket that are from other locators.

Response Data

The Response Data tab allows you to enable extra response input data fields. When a response is posted for a member code on a ticket, these optional fields can be included to capture extra response information.



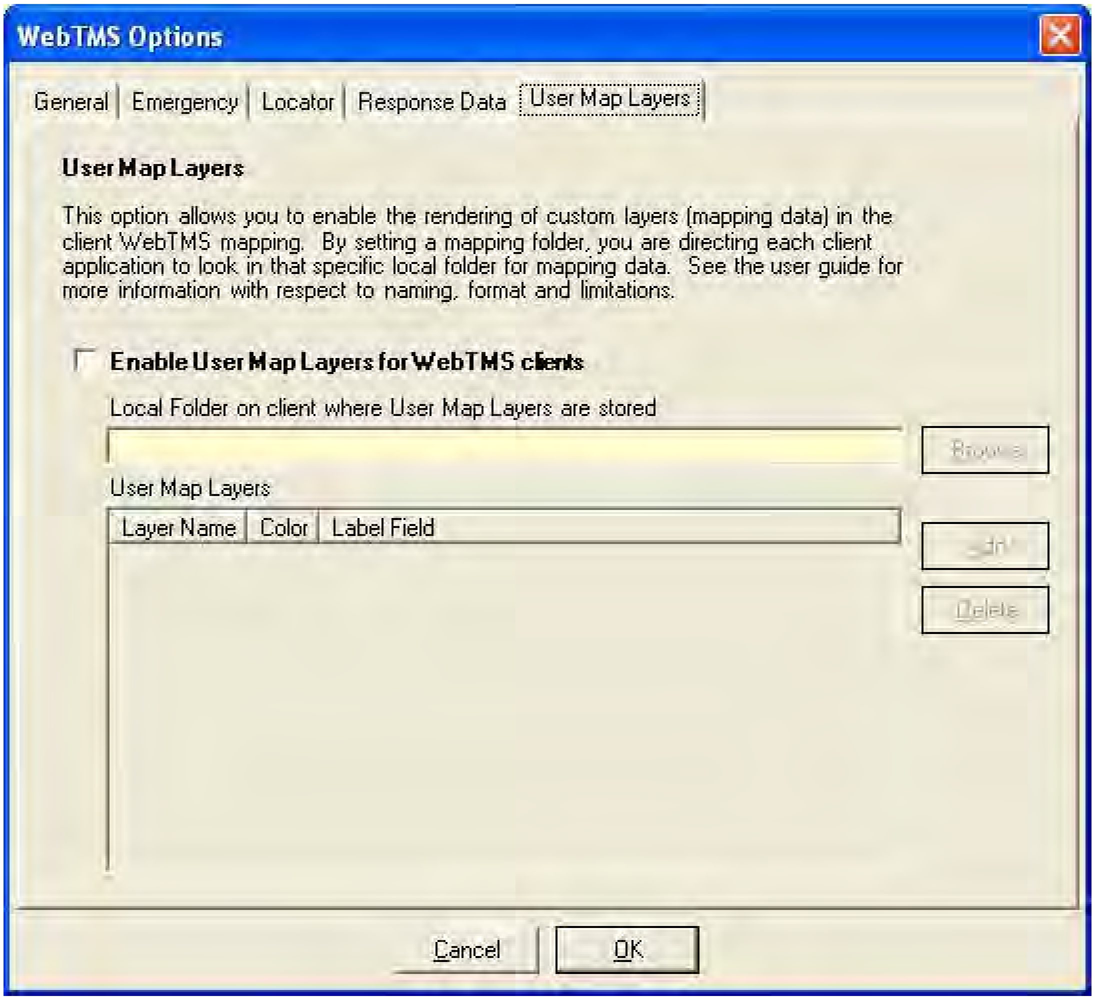
For each optional field enabled, it will be display on the Post Response dialog as shown below:



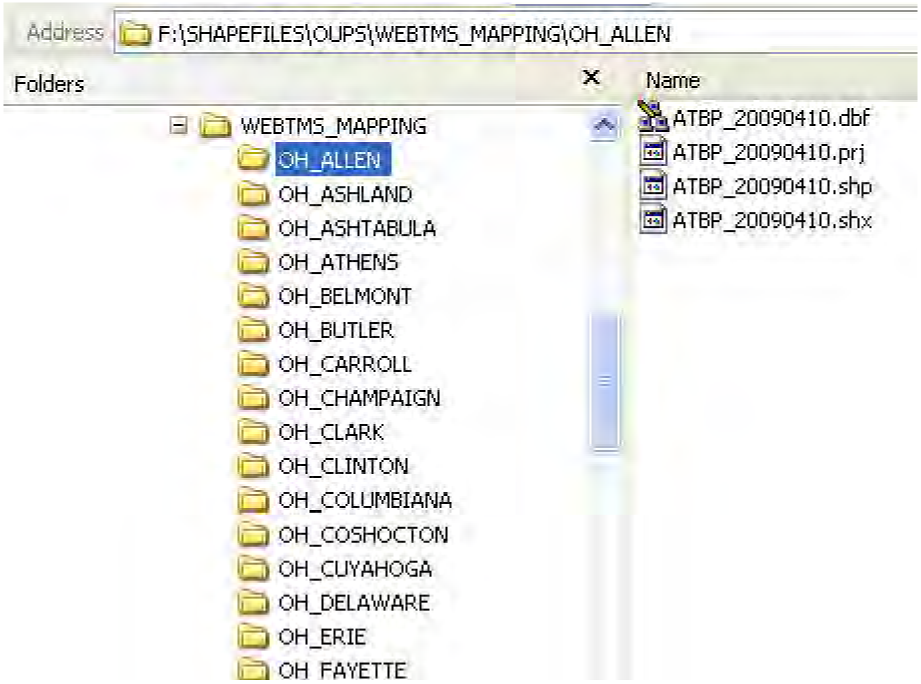
User Map Layers (Optional)

User Map Layers allows you to render ESRI Shape Files on the client side. In order to set this up, the mapping shape file layers must be placed in the folder specified in the "Local Folder" field. When setting this up, the data must be present on the machine doing this configuration. Once it is set up and defined, layers can be copied to other client machines which run WebTMS and the mapping layers will be detected and displayed.

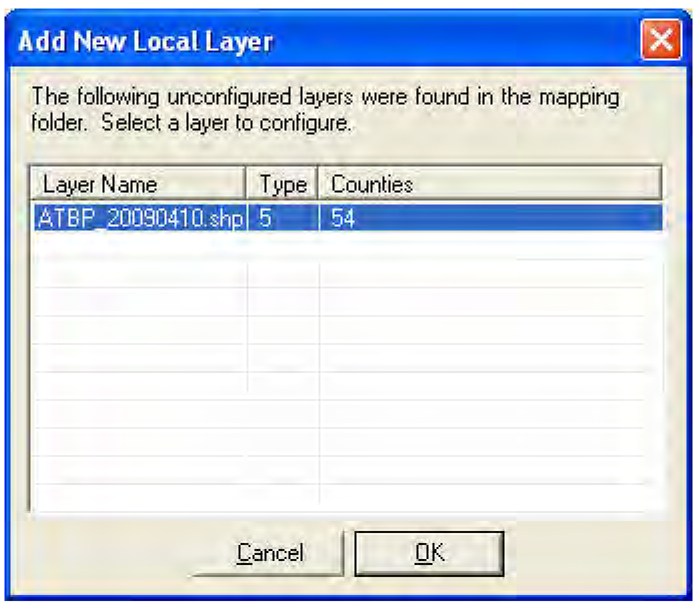
CAUTION: *The ability to specify arbitrary end-user map layers can present a significant performance hit if the mapping data in those layers are overly complex or overly simple. Overly complex layers may contain one extremely large and complex multi-part polygon. Overly simple layers may be large files with thousands or tens of thousands of polygons. If needed, a utility is available that can take a shape file and simplify it so that it is neither overly complex nor overly simple.*



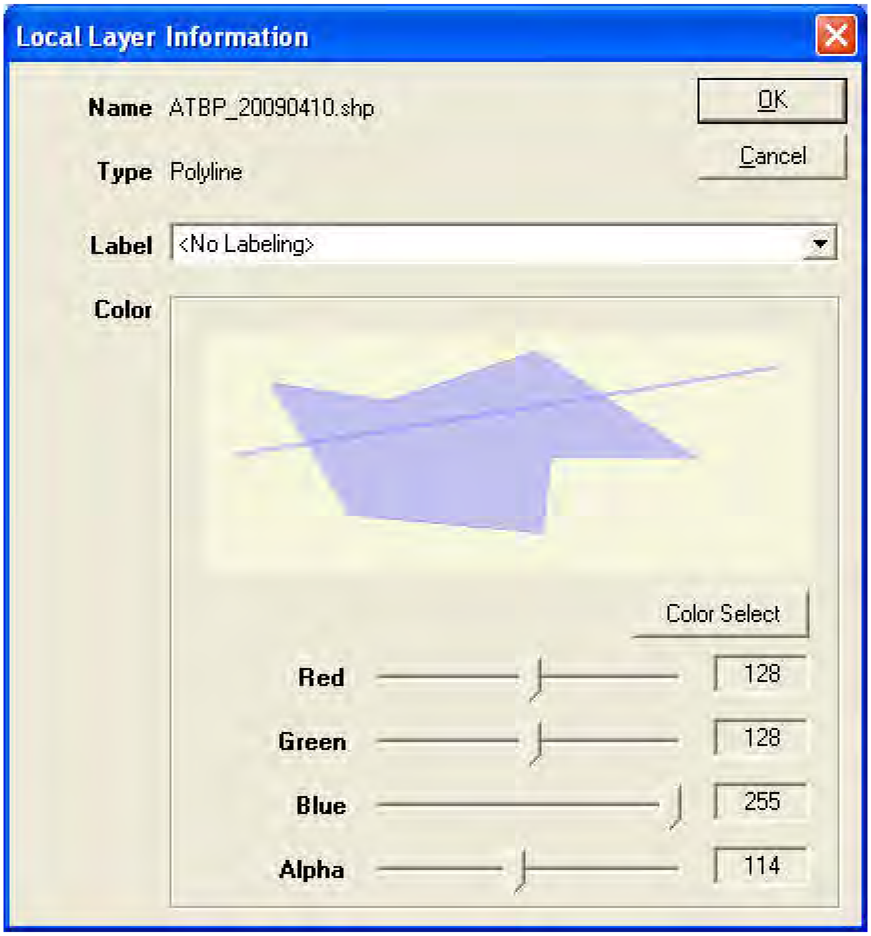
The mapping data must be stored in a specific directory format, one folder for each county, and each shape layer is assumed to contain only data for the county folder it resides in. So the folder specified for "Local Folder" on the setup screen will contain the mapping data in sub-folders named using the state and county name. For example, of the "Local Folder" setting is set to "**C:\MAP_DATA**", then that folder is expected to contain folders named (in this case for Ohio) "OH_ADAMS", "OH_ALLEN", "OH_ASHLAND", etc. A "layer" is considered to be the collection of shape files sharing the same filename in different counties.



After defining the Local Folder where the WebTMS client is directed to look for map layers, you click the "Add" button to add a new layer. The application will search the county sub-folders looking for all the different unique filenames for shape files. Each of these unique names is considered a "Layer" and can be added to the User Map Layers section. Up to 10 layers maximum can be specified. If no new unique layer names are detected, you will receive a message stating that when you click the Add button. In the example folder example in the above image, ATBP_20090410 is the layer name and that filename can be used in any of the counties and refers to the same logical layer.



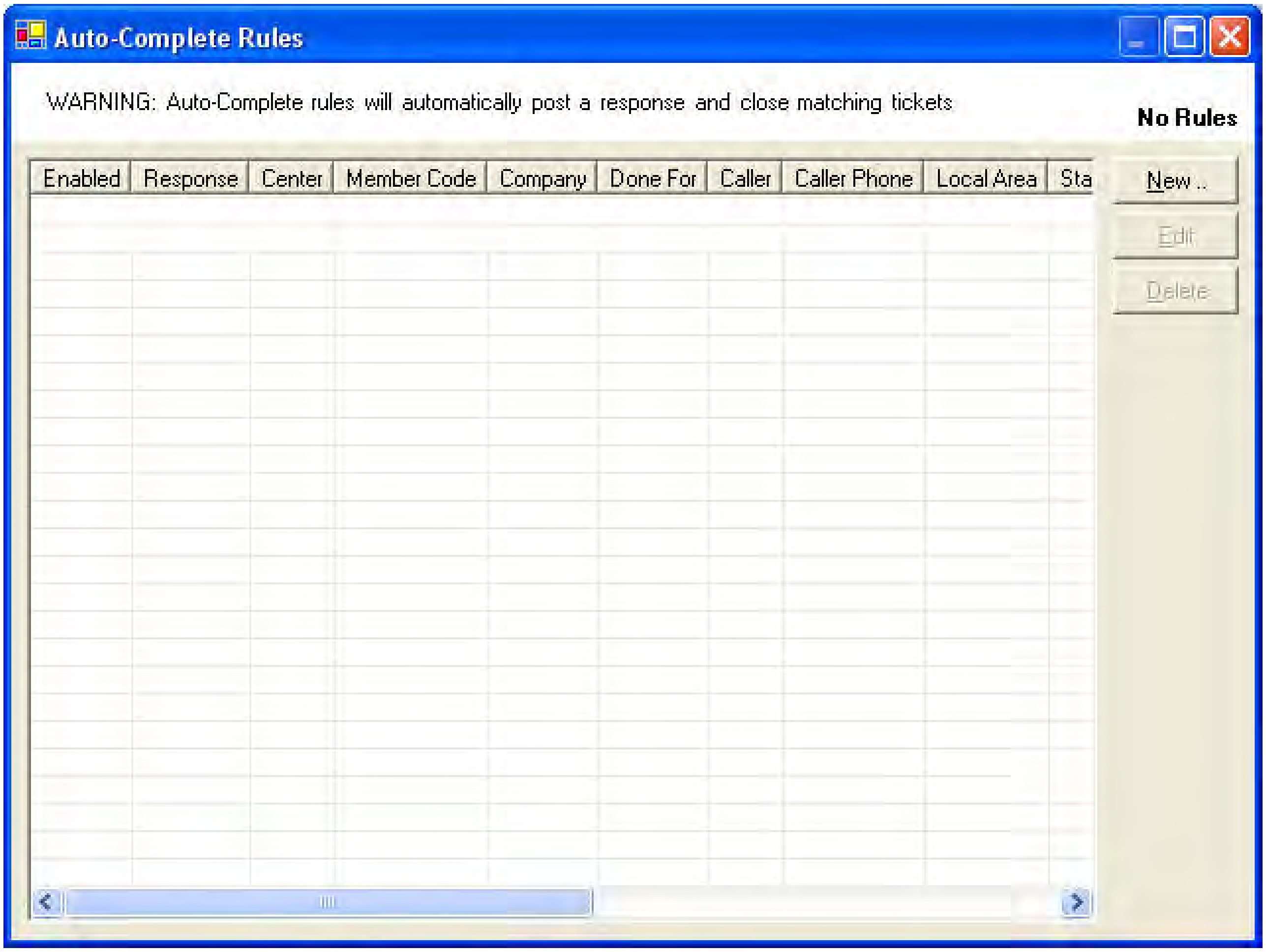
After selecting a detected layer to add, you will be prompted to specify the rendering color and to define a label attribute field.


Local Layer Information
Name ATBP_20090410.shp
OK
Type Polyline
Cancel
Label <No Labeling>
Color
Color Select
Red 128
Green 128
Blue 255
Alpha 114

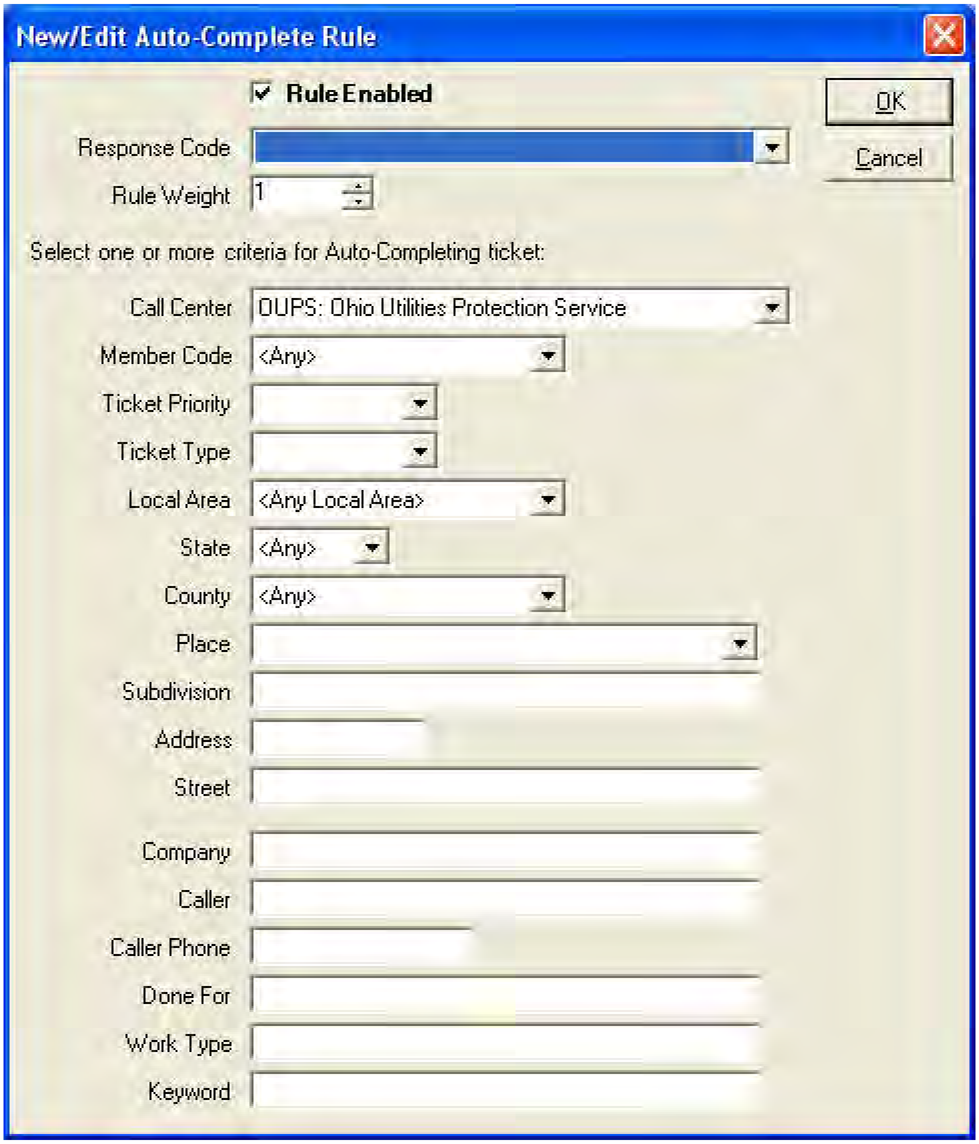
Auto-Complete Rules

Auto-Complete rules allow you to automatically post responses for member codes on a ticket, which may complete the ticket. If a ticket matches one or more of the rules, then the specified response code will be posted.

The Auto-Complete Rules dialog will display each rule defined that has been created. Note that you can disable a rule without deleting it, as indicated by the first column.



To add a new rule, edit a rule or delete a rule, use the specified button. The Edit Auto-Complete Rule dialog is used to define each rule:



Rule Enabled - If unchecked, then this rule will be ignored by the auto-complete process.

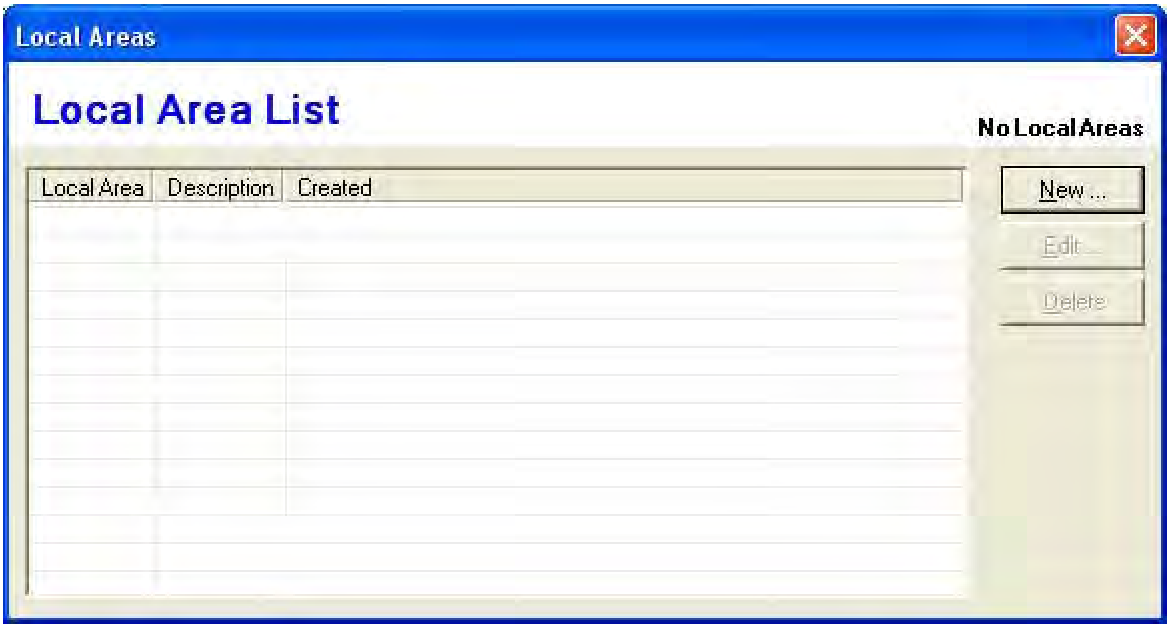
Response Code - Select the response code that will be posted.

Rule Weight - Enter a rule weight (default is 1.) If multiple rules match a given ticket, the rule with the highest weight will be applied. In the case of a tie, no rule is applied and the ticket continues on to the Assign Locator stage.

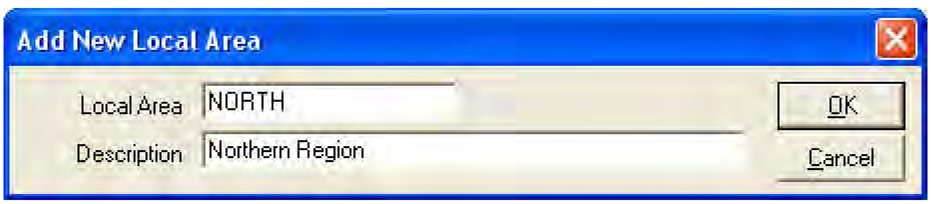
The rest of the fields on this dialog allow you to specify specific values that must match a ticket in order for the rule to be applied.

Local Areas

Local Areas are optional and allow you to assign tickets (and users) to named groups. These groups are generally treated as separate entities and do not see each others tickets, such as two or more distinct locating offices. The Local Area list window is used to create new named areas. The Area-Assign windows (text and map grid based) allow you to create rules which assign each ticket to a local area. Local Areas are assigned as part of the initial ticket parsing and loading process, see the Ticket Processing page for information on ticket flow and stages.

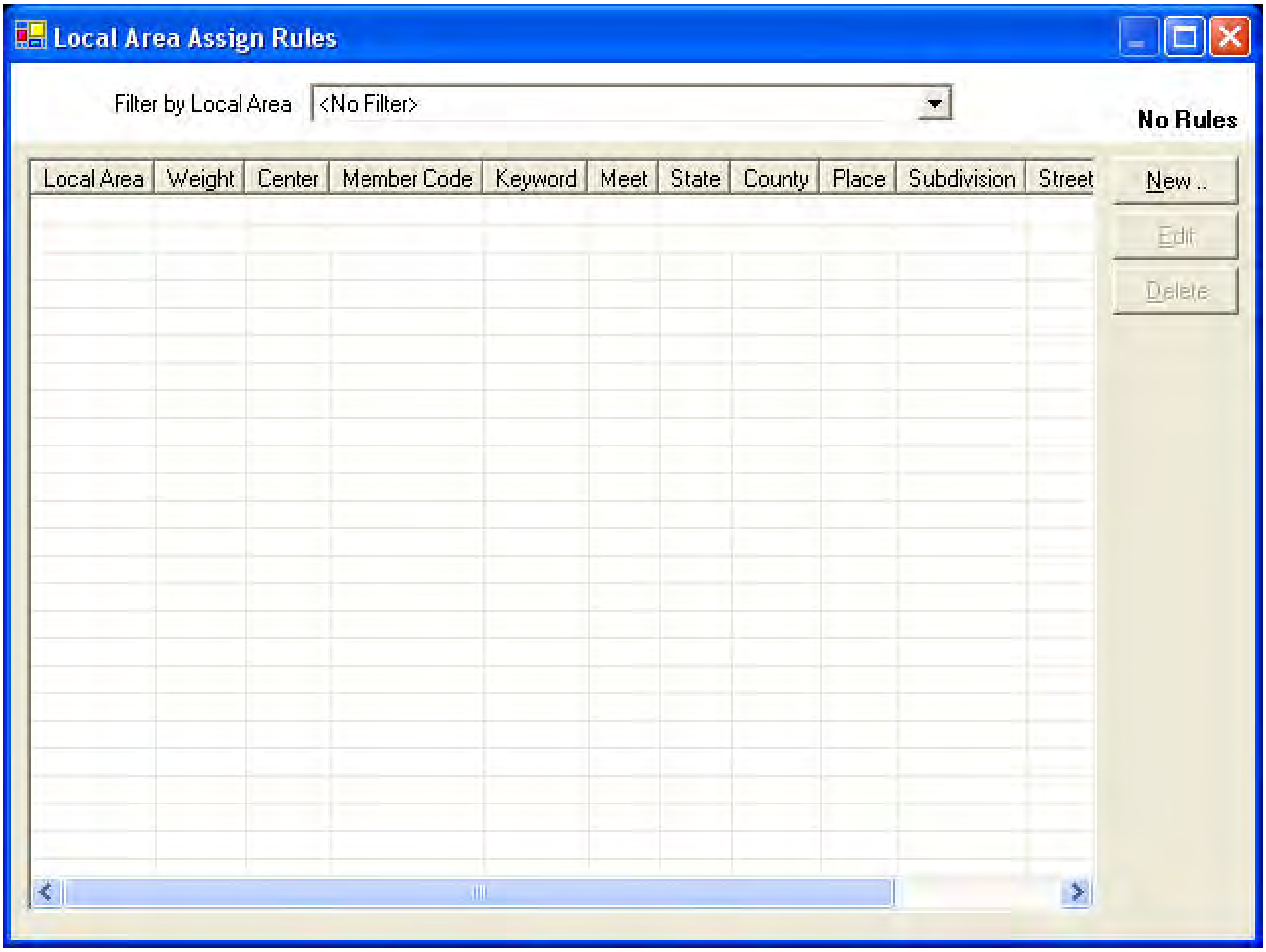


Click New to create a new local area. Enter the short name and a description of the local area:

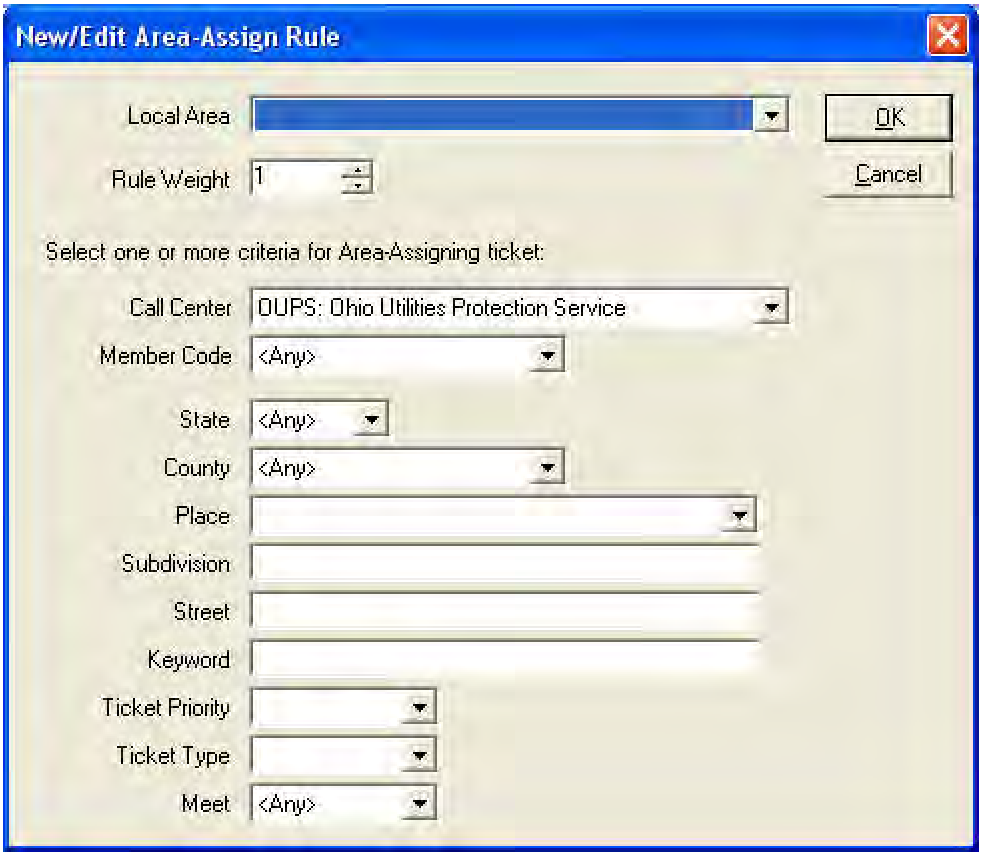


Local Area-Assign (Text)

Like the Locator Auto-Assign by rules, the Local Area-Assign lists rules that allow you to assign a named Local Area to each ticket.

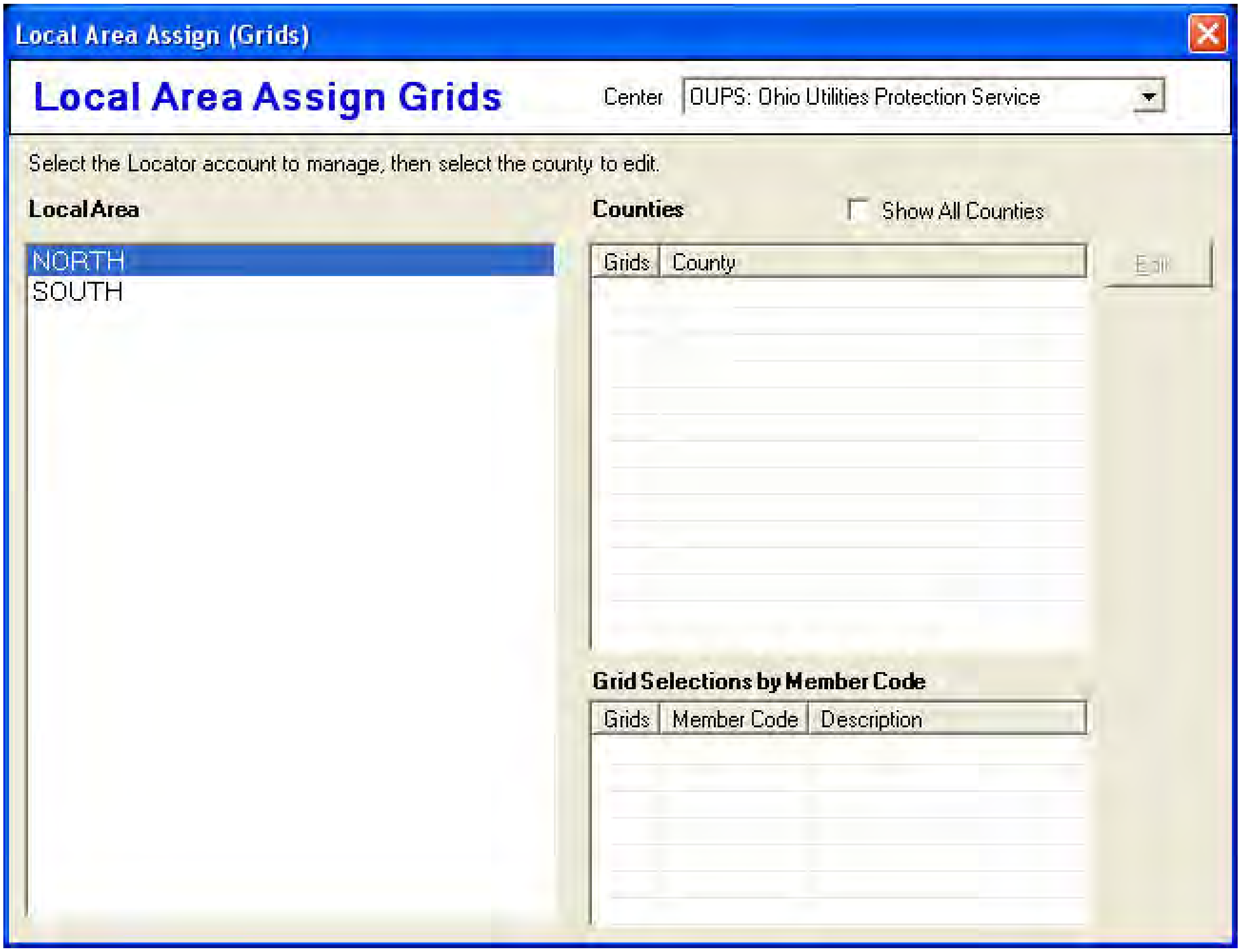


Clicking New or selecting a rule and clicking Edit will display the rule dialog, similar to the Locator Auto-Assign window.



Local Area-Assign (Grid)

If finer control is required, you can use gridding to define local areas. This interface is just like the Locator Auto-Assign (Grid) window, except you are targeting a Local Area instead of a Locator.

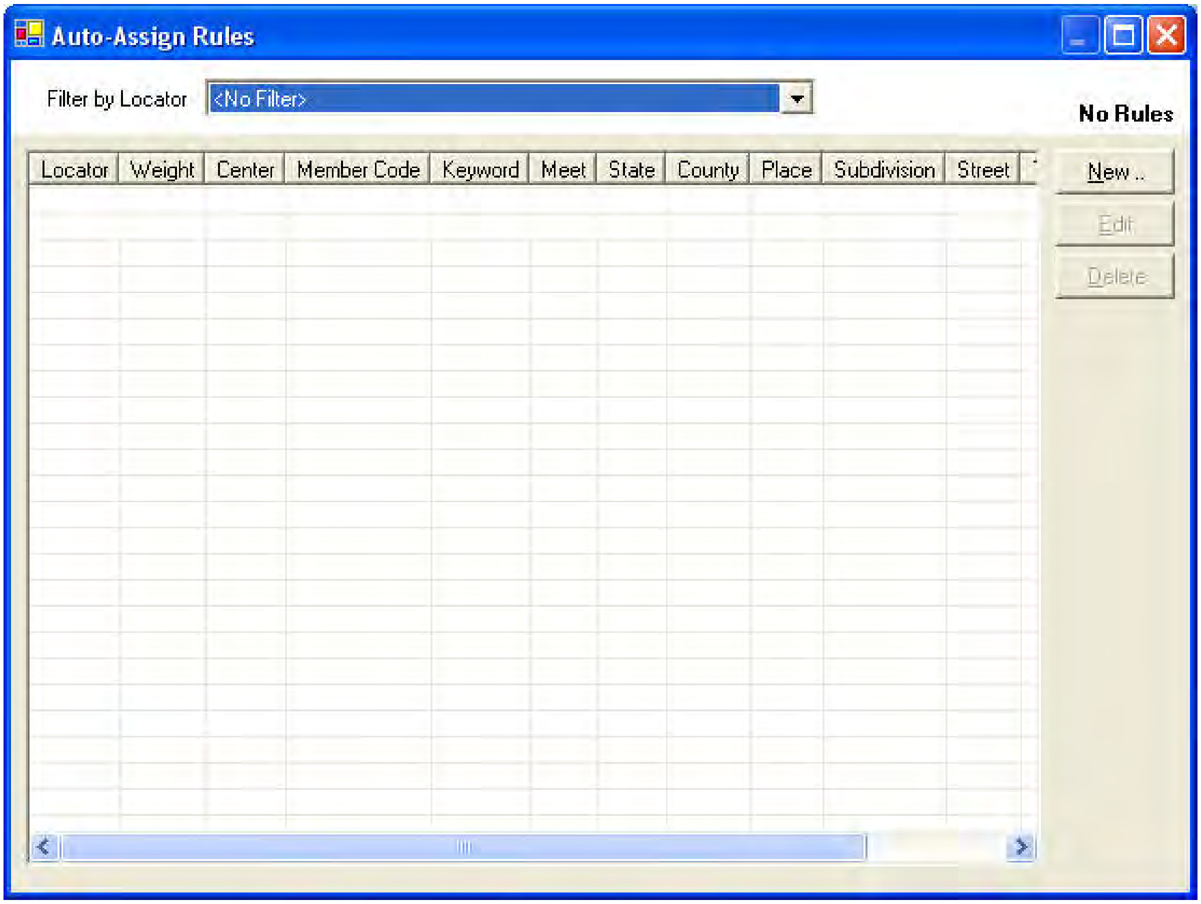

Local Area Assign (Grids)
Local Area Assign Grids
Center
OUPS: Ohio Utilities Protection Service
Select the Locator account to manage, then select the county to edit.
Local Area
NORTH
SOUTH
Counties
Show All Counties
Grids
County
Edit
Grid Selections by Member Code
Grids
Member Code
Description

Locator Auto-Assign Rules

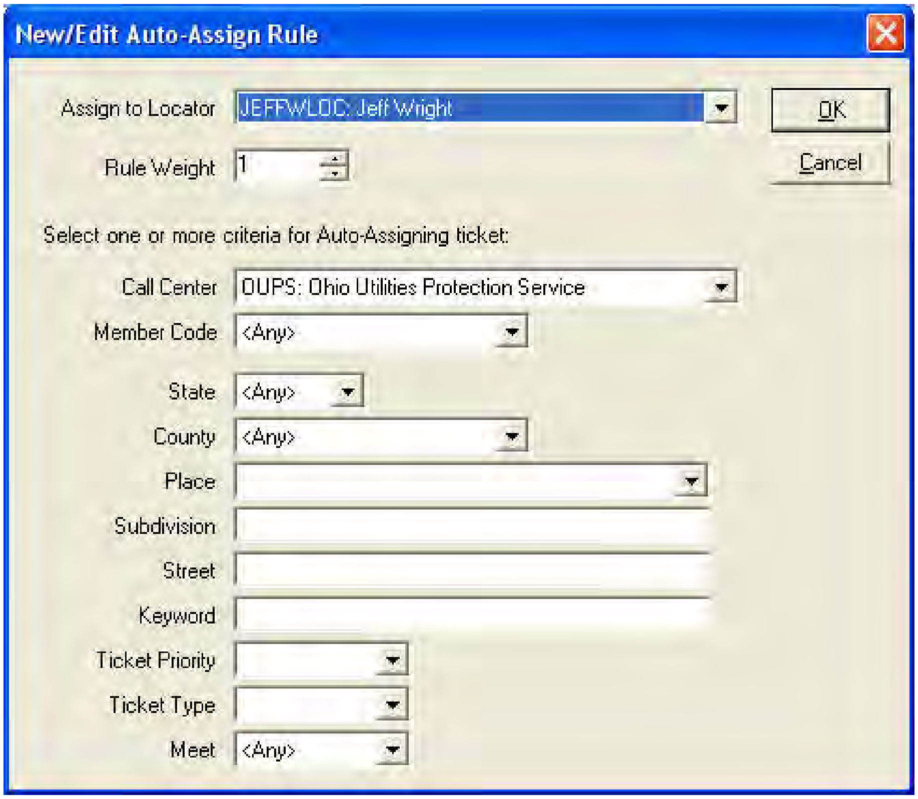
There are two methods of Auto-Assigning tickets to locators, one is Text based and the other is Map Grid based. These two methods can be used in combination to produce the desired Locator assignment options.

Auto-Assign (Text)

The text method allows you to specify specific fields on the ticket that much match in order for the rule to be applied.



Use the Filter by Locator selection to narrow the list down to a single locator. Click the New button to create a new rule, or select an existing rule and click Edit or Delete. When you click New or Edit, you will open the Edit Auto-Assign Rule window:



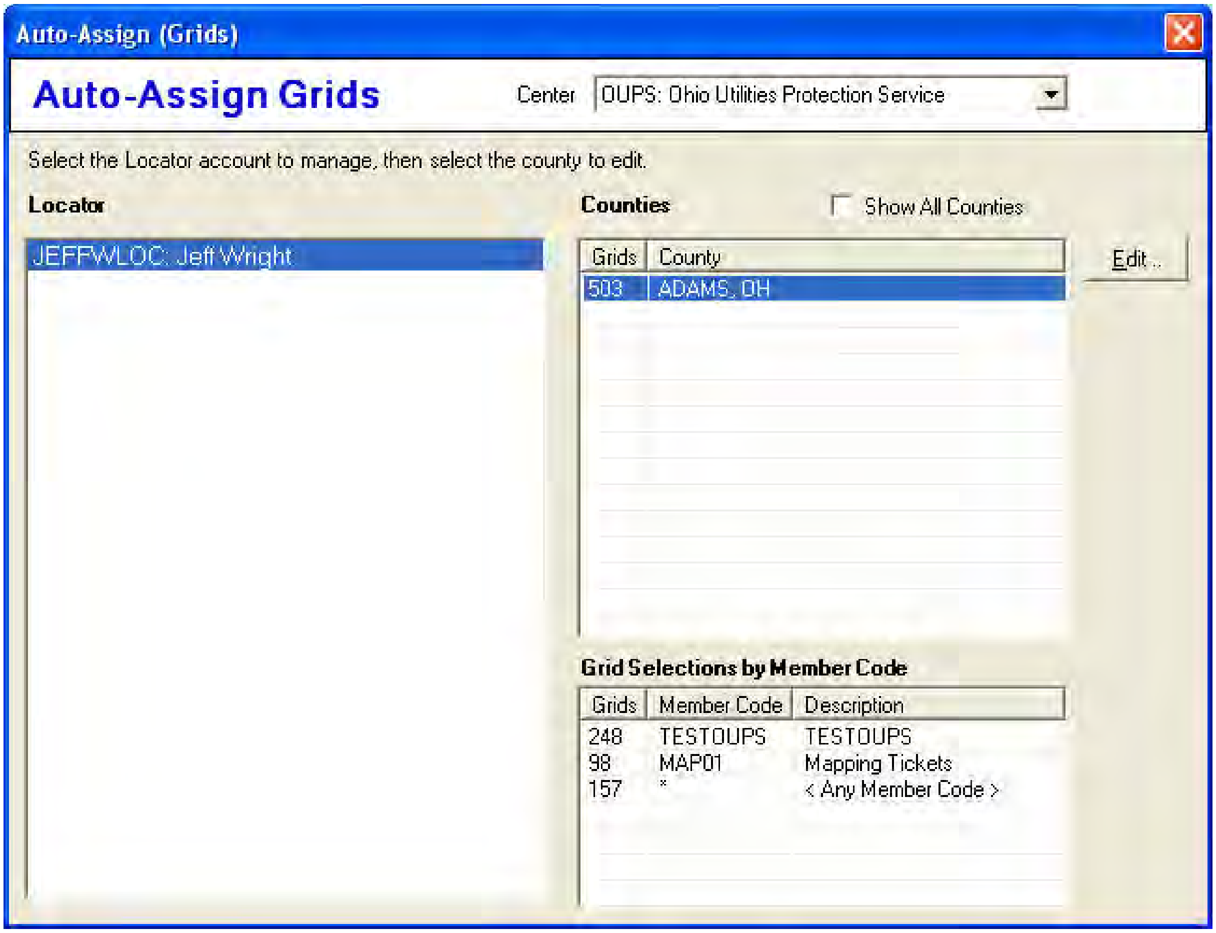
Assign to Locator **-** The locator to which the ticket will be assigned. Note that ticket assignment is at the member code level, so if you have multiple member codes on the ticket for which you handle, each member on the ticket will go through the Auto-Assign process. In this way, you can have more than one locator assigned to a given ticket.

Rule Weight **-** Enter a rule weight (default is 1.) If multiple rules match a given ticket, the rule with the highest weight will be applied. In the case of a tie, no rule is applied and the ticket is placed into Initial Receive (IR).

The rest of the fields allow you to define the matching rules.

Auto-Assign (Grids)

The grid matching method allows you to specify, using a map, what gridded map area will be used to match tickets for auto-completion.



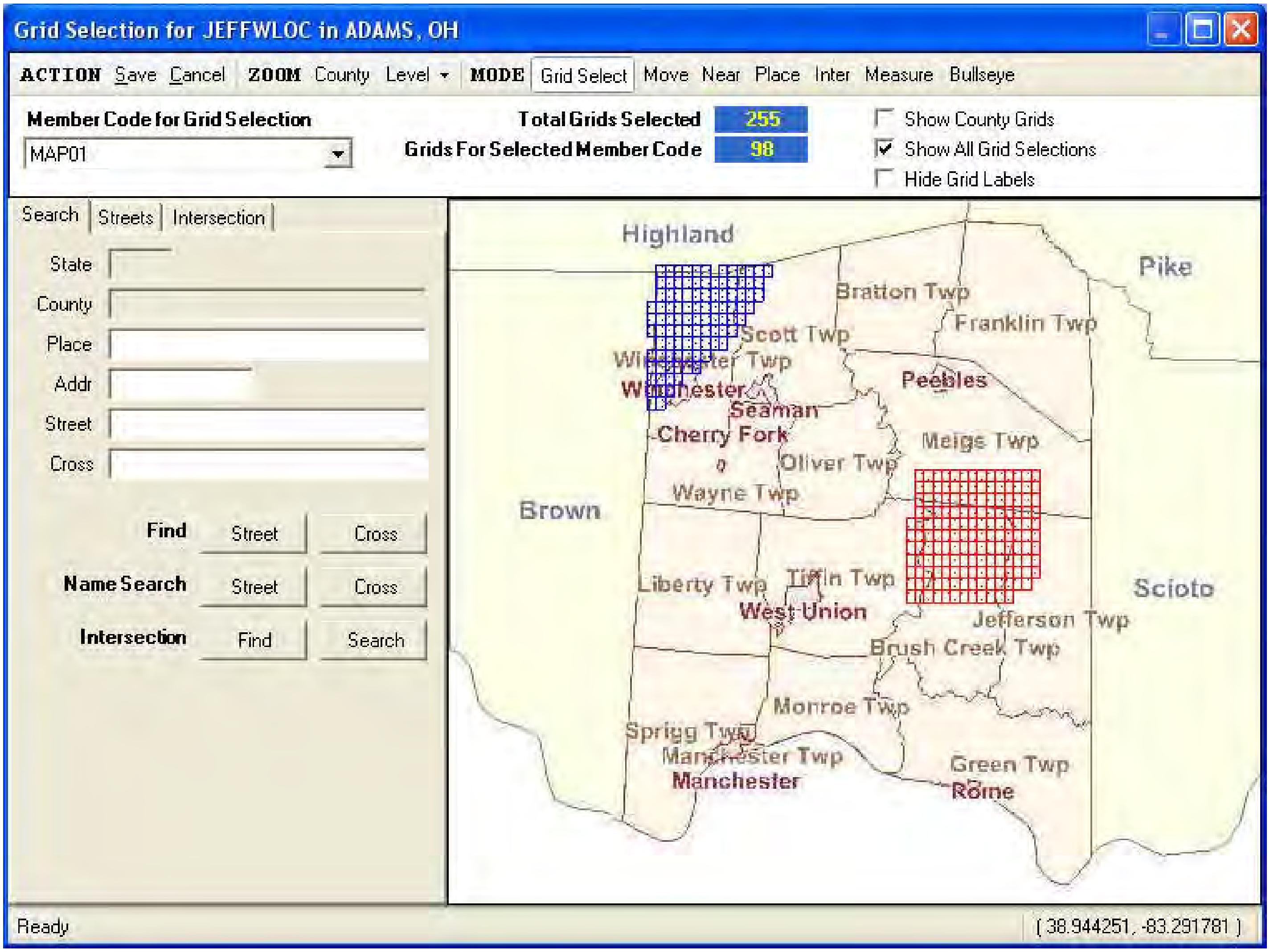
Locator - Select the locator for which you will be editing auto-assign rules for. When you select a locator, the area on the right (Counties, Grid Selections statistics) will be updated.

Counties - Lists counties which contain grid data for the selected locator. Until data is entered, this list will be empty. Check the "Show All Counties" checkbox to show all counties and then select one for editing.

Grid Selections by Member Code - This area displays statistics about each member code (an asterisk "*" means any member code) for which there is grid data for.

Edit Button - The Edit button will be available when a locator and a county has been selected. This will display the Grid Editor Map window.

Grid Selection edit window



The Grid Selection window acts somewhat like a paint program, except in this case you are drawing grids. Blue grids represent the active grid set you are editing. This active set is defined by the selected "Member Code for Grid Selection", in the upper left. Red grids represent grid selection data for other member codes, but still the same locator. To draw, click and hold down the left mouse button and move the mouse. Likewise, clicking on a selected grid will remove the grid and, as long as you keep your mouse button down, remove other selected grids as you move your mouse over them.

ACTION Save / Cancel - Select the Save button to save your current changes and exit this window. Use the cancel button to exit without saving.

ZOOM - County / Level - Click the County button to zoom out to a full-county view of the map. Click the level button to select a pre-defined level (1 to 10).

MODE - Grid Select - This is the grid selection / drawing mode. When this mode is selected, click the map to select a grid, or select a grid to un-select it. To cover an area, hold down the left mouse and move the mouse over the grids to select or unselect. What you click on initially determines if you will be in grid selection or de-selection mode. Click on a grid initially to enter de-selection mode.

MODE - Move - This mode is for moving around the map with the mouse. Clicking a point on the map will re-center the map display at that point. To zoom into an area, click and hold the mouse at one point, and move the mouse to create a zoom box. Using your left mouse button will zoom into that area. Using the right mouse button will zoom out.

MODE - Near - This mode allows you to identify streets on the map. You must be at zoom level 5 or closer. Clicking near a road will display the feature name, place name and address attributes and highlight the feature identified using yellow.

MODE - Place **-** This mode allows you to click on the map and identify the current Place you are in. The lower-left corner of the window will display the place name found and it will be highlighted on the map display.

MODE - Inter **-** This mode will allow you to click on a road and display all the street intersection. Intersections will be listed on the left in the "Intersections" tab and will be highlighted on the map.

MODE - Measure - This mode is to measure distance on the map. Click the starting point on the map and then double-click the ending point. You can left-click multiple times before double-clicking to end the measurement. The measurement distance will be displayed in the status area, in the lower left of the window.

MODE - Bullseye - This mode will render a 1,000 foot bullseye at the point clicked, at intervals of 100 feet.

Show County Grids - This option toggles the county grid layer on and off, showing all grids in the county.

Show All Grid Selections - This option will toggle the display of other grid selections (in red), for member codes other than the one selected in the "Member Code for Grid Selection" area.

Hide Grid Labels - This option will hide the grid names when rendering them on the map.

Part 11 – Operator Tasks

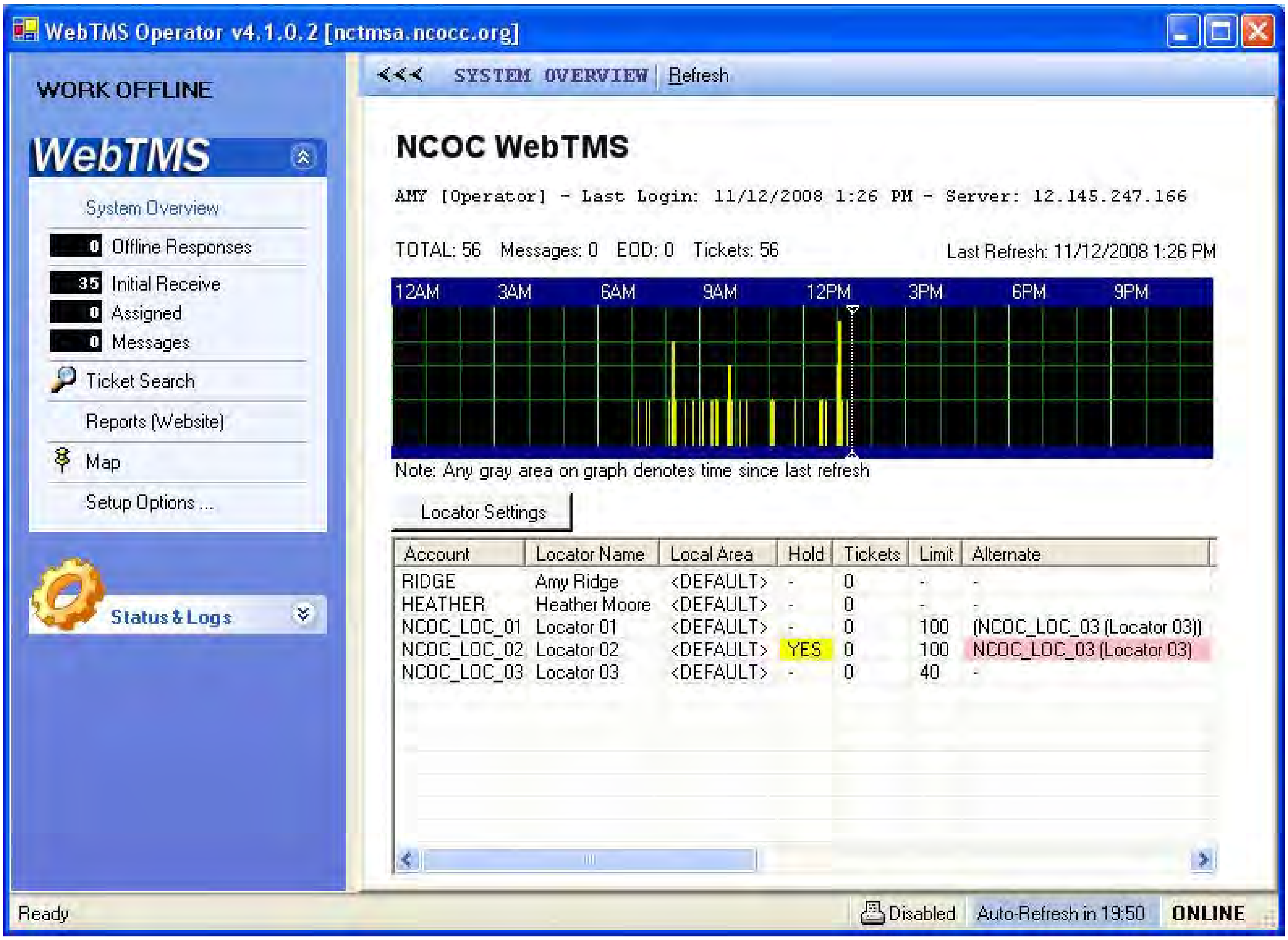
- **System Overview**
- **IR - Initial Receive**
- **AL - Assigned to Locator**
- **Assign to Locator**
- **Post Response**
- **Messages**
- **Ticket Search**
- **Map view**

System Overview

The system overview window provides a quick view of the system state.

The graph area shows when tickets were received that day from the One-Call system by the WebTMS system. The bottom area lists all locators and their current status and settings. For each locator, you can see if they are on hold, how many open tickets they have, alternate locator, upcoming vacation days and the last time they refreshed their WebTMS client software (i.e., downloaded their latest tickets from WebTMS).

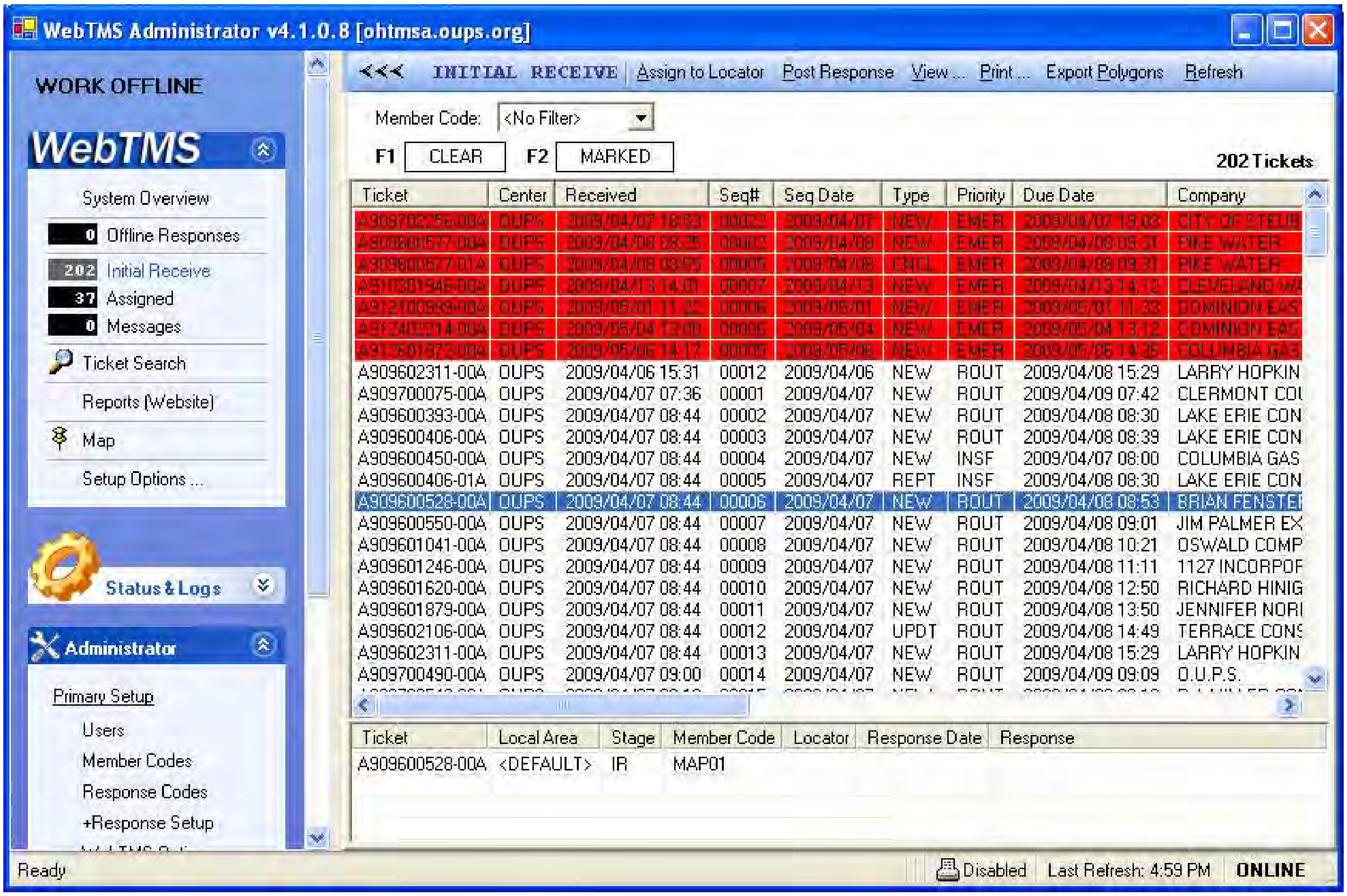
Note that Operator accounts, if the option is set under WebTMS Options, will have the "Locator Settings" button. This will open the Users dialog and allow them to modify Locator accounts.



IR - Initial Receive

The Initial Receive window displays all tickets for which there is at least one un-assigned member code (and response record). Highlighting a ticket will display the response records in the bottom area, showing the response stages of each member code you handle. See Ticket Processing for more information on the ticket and response stages. If you highlight more than one ticket, the bottom area is disabled, but you will be able to Assign to Locator, Post Response, or Print multiple tickets at once. The Assign to Locator and Post Response functions allow you to filter the selected tickets further. To view a ticket, you can double-click a ticket in the list or select it and click "View" from the menu. The Refresh button will cause the client to check the server for the current list. Generally you will set up an auto-refresh interval so that the client checks for new tickets automatically.

The columns visible, and their order, can be customized on a per-user basis. To re-order the columns, simply click and drag the column to reposition it. Then go into User Setup Options and (under IR Columns) click the "Save Current Column Order" button to save the changes.



Assign to Locator - (*1 or more tickets*) Opens the Assign to Locator window.

Post Response - (*1 or more tickets*) Open the Post Response window.

View - (*1 ticket only*) Opens the Ticket window.

Print - (*1 or more tickets*) Opens the Print window and prints the selected tickets.

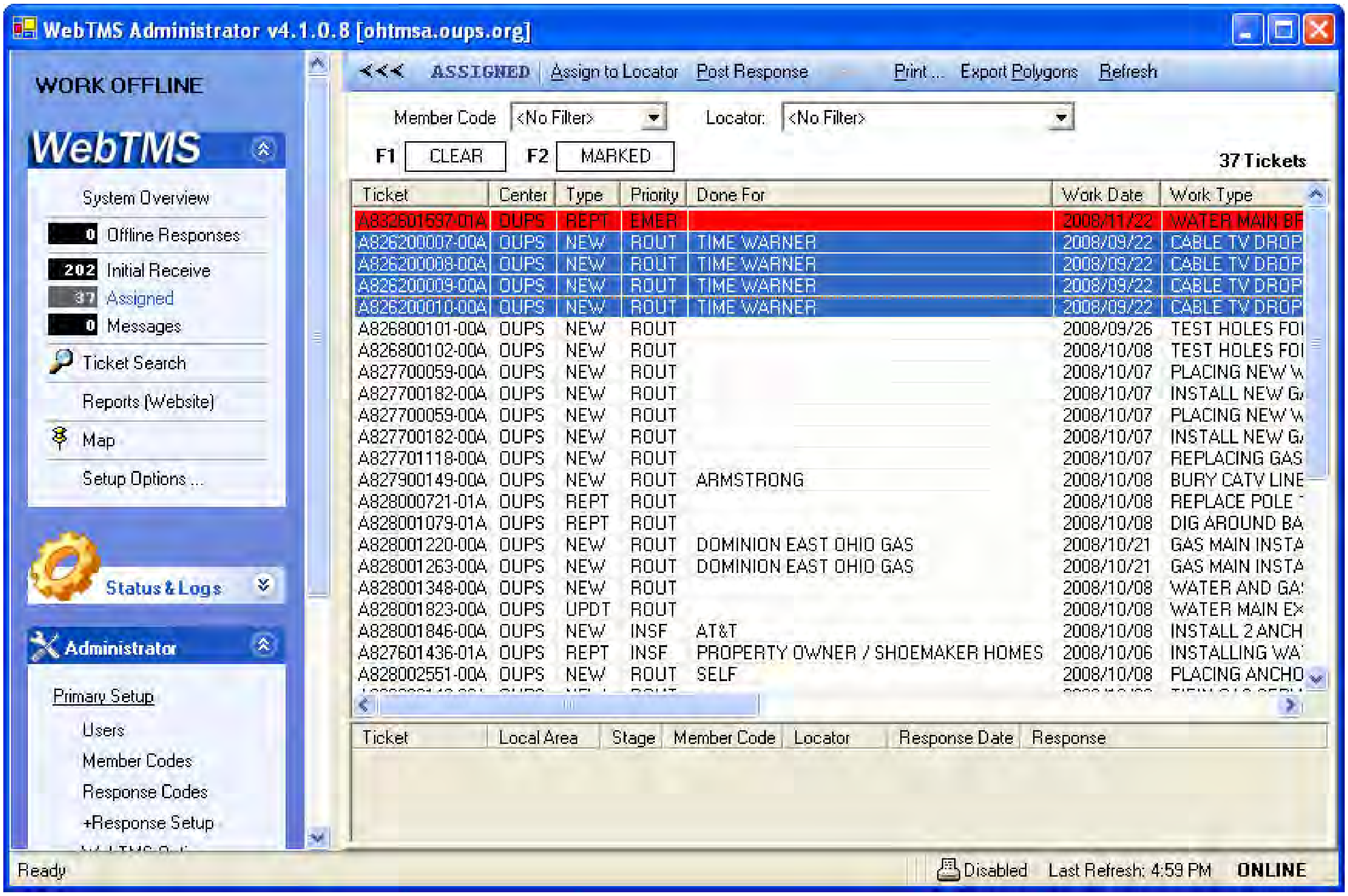
Export Polygons - (*1 or more tickets*) Exports the polygons associated with the selected ticket(s) to an ESRI Shape File (*.shp).

Refresh - Refreshes your view of tickets from the WebTMS server. Set the Auto-Refresh timer in Setup Options to have the client automatically do this.

AL - Assigned to Locator

The Assigned window will display all open tickets for which there is an assigned locator. When a single ticket is selected, Ticket Response records are displayed in the bottom area, showing their stages and assignments. Use the Code and Locator selection boxes to filter the list down to a specific member code and/or Locator assignment. Double-clicking a ticket, or selecting it and clicking View will open the Ticket window.

The columns visible, and their order, can be customized on a per-user basis. To re-order the columns, click and drag the column to reposition it. Then go into User Setup Options and (under IR Columns) click the "Save Current Column Order" button to save the changes.



Assign to Locator - (*1 or more tickets*) Opens the Assign to Locator window.

Post Response - (*1 or more tickets*) Open the Post Response window.

View - (*1 ticket only*) Opens the Ticket window.

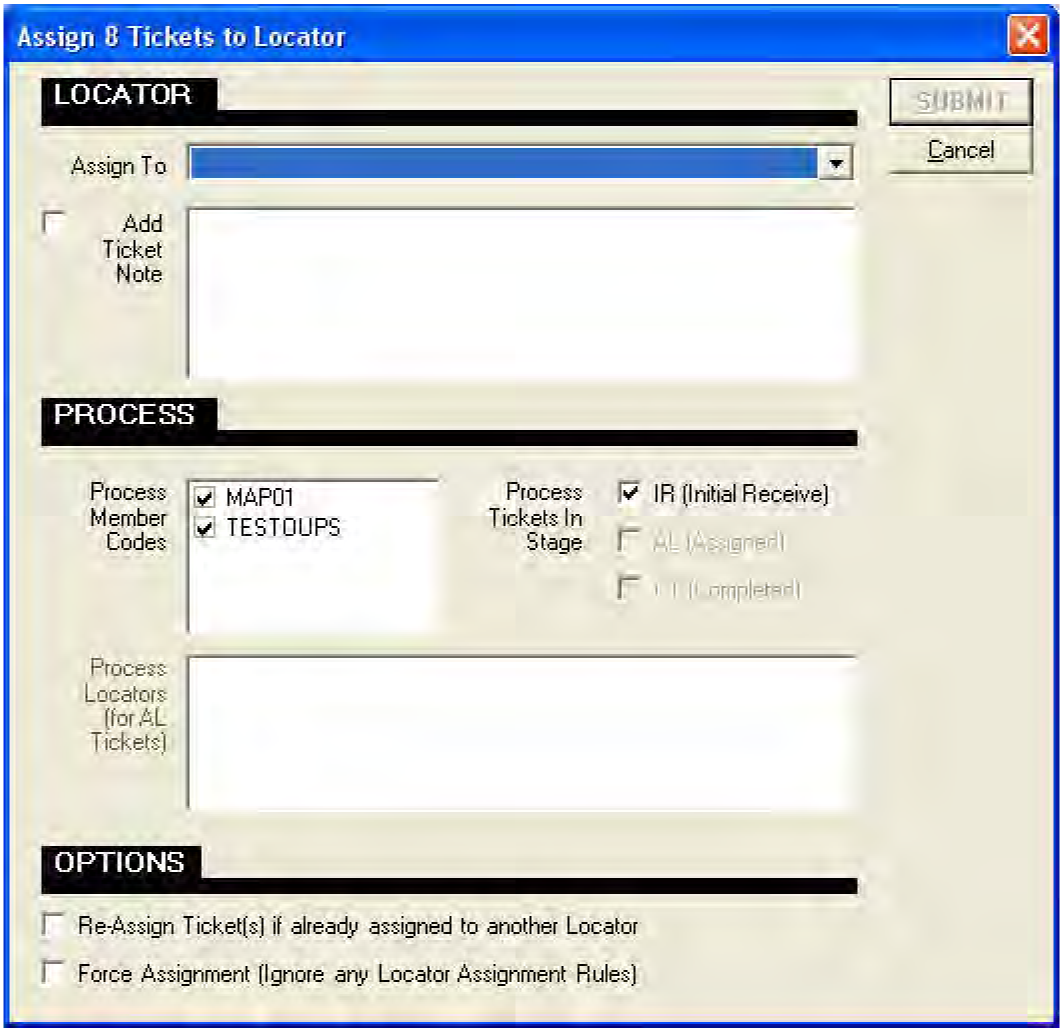
Print - (*1 or more tickets*) Opens the Print window and prints the selected tickets.

Export Polygons - (*1 or more tickets*) Exports the polygons associated with the selected ticket(s) to an ESRI Shape File (*.shp).

Refresh - Refreshes your view of tickets from the WebTMS server. Set the Auto-Refresh timer in Setup Options to have the client automatically do this.

Assign to Locator function

In the Initial Receive and Assigned windows, you may select one or more tickets and click use the Assign to Locator function. Select the locator to assign the ticket(s) to and click the SUBMIT button. To process a subset of the selected tickets or over-ride the default processing rules, use the PROCESS and OPTIONS sections.



LOCATOR

Assign To - Specify the locator you wish to assign the tickets to.

Add Ticket Note - Add an optional note to attach to the ticket.

PROCESS

Process Member Codes - All the distinct member codes from the tickets selected will be displayed here. In this way, you can process only those response records (member codes) that are selected.

Process Tickets In Stage - All the distinct stages from the tickets selected will be represented here. Using these checkboxes, you can specify which stage the response record must be in, in order for it to be assigned to the locator.

Process Locators (for AL Tickets) - For tickets responses in the Assigned to locator stage (AL), this will list each locator. You can select which response records to process by checking or unchecking each locator.

OPTIONS

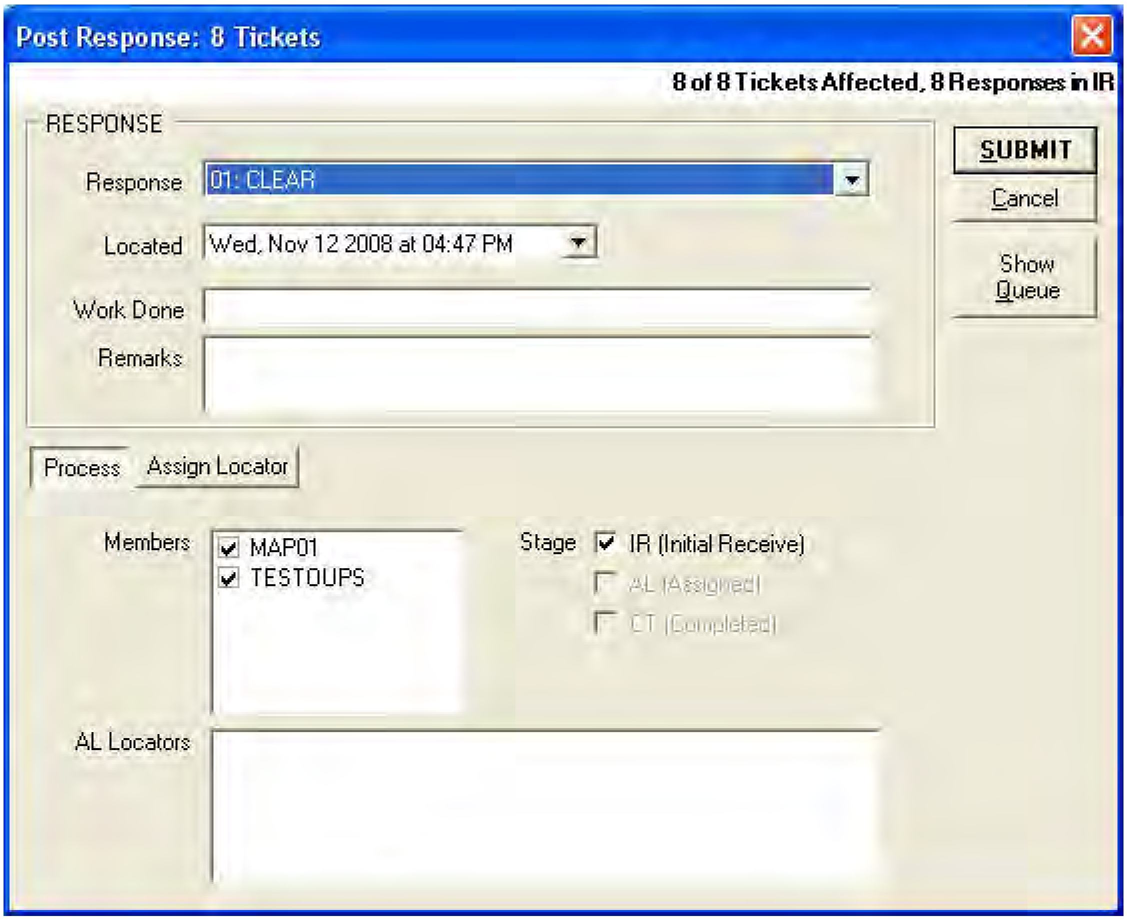
Re-Assign Tickets(s) if already assigned to another Locator - if the response record is already in the Assigned to Locator (AL) stage, then re-assign the ticket. If not set, then tickets that are already assigned to a locator *will not be re-assigned* in this process.

Force Assignment - This option will force the assignment and ignore any Locator rules in effect such as a forced alternate locator or being on hold.

Post Response

The Post Response function allows you to post a response to one or more selected tickets, optionally filtering your original selection and optionally assigning or re-assigning the locator. Select a response code from the Response selection box. This will be automatically selected for you if you use the User Buttons Function (F1-F4) key option in the User-Specific Setup Options.

PROCESS



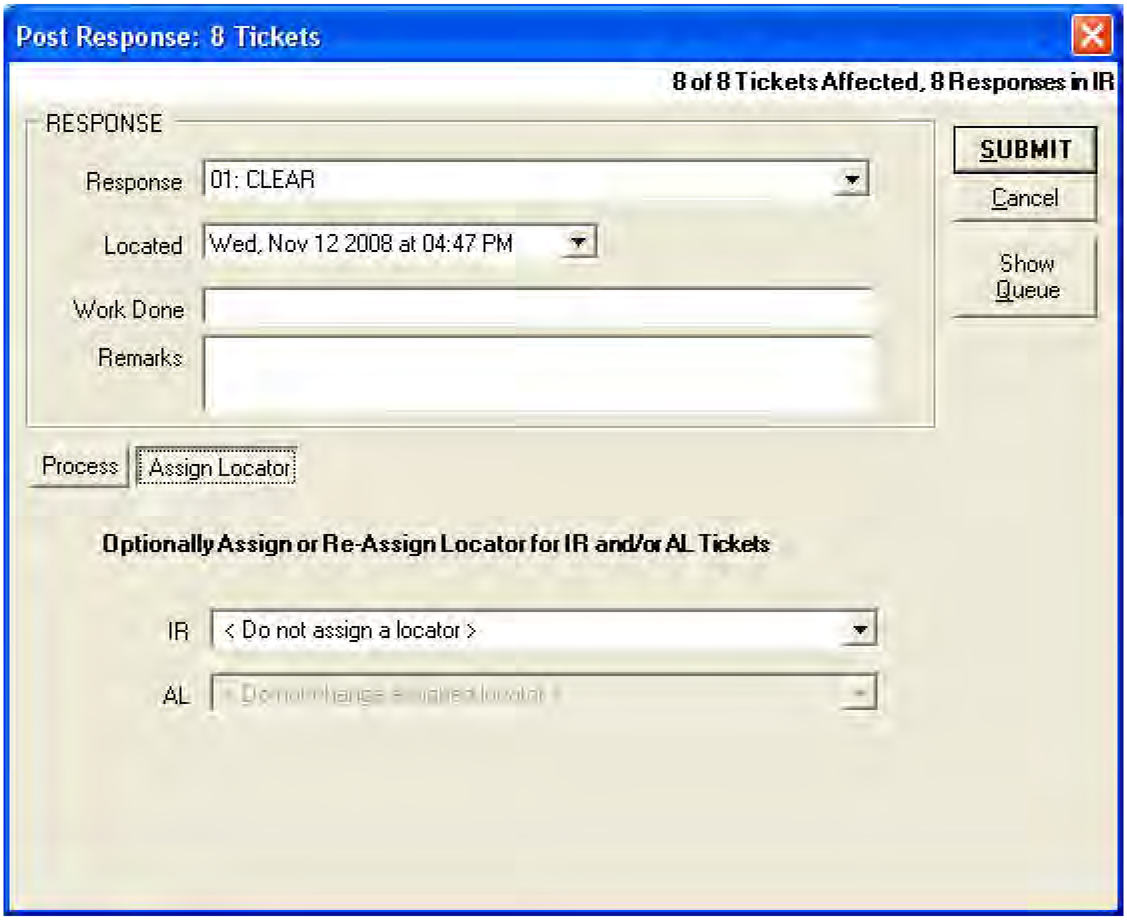
Members - This option lets you limit which member codes will be responded to. In this manner you can select many tickets and only respond to a specific member code.

Stage - This option lets you limit which stage the response item must be in for it to be responded to.

AL Locators - This option lets you limit what records will be responded to based on the currently assigned locator. This option will only be available if there are response records in the Assigned to Locator (AL) stage.

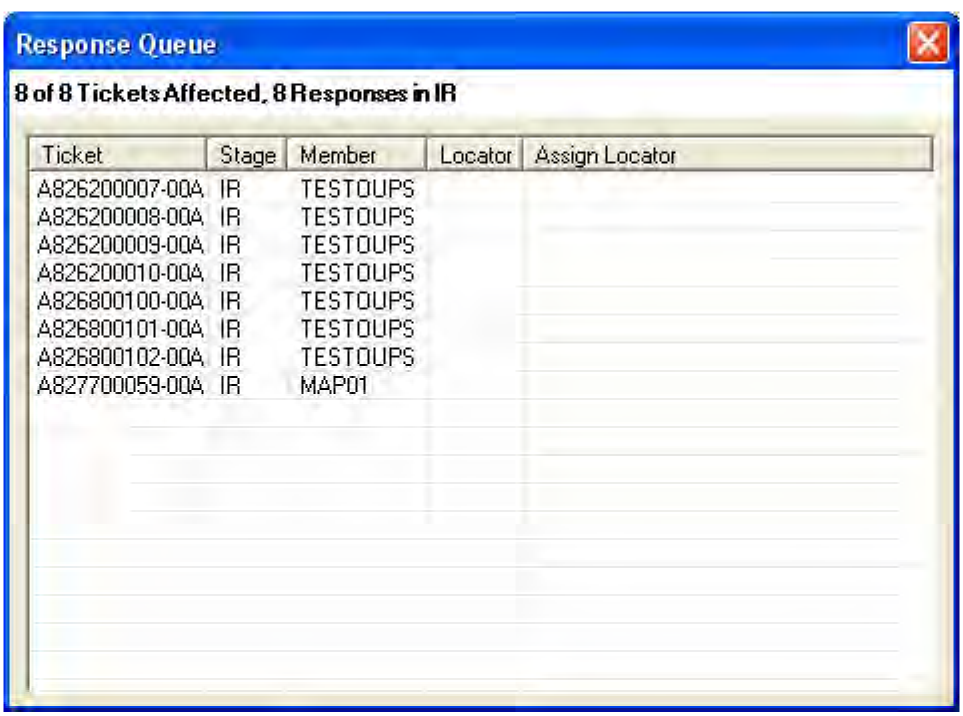
Assign Locator

In the Assign Locator selection, you can assign a locator for responses in the Initial Receive (IR) stage, and the Assigned to Locator (AL) stage. If no tickets are in the specified stage, the option will be disabled.



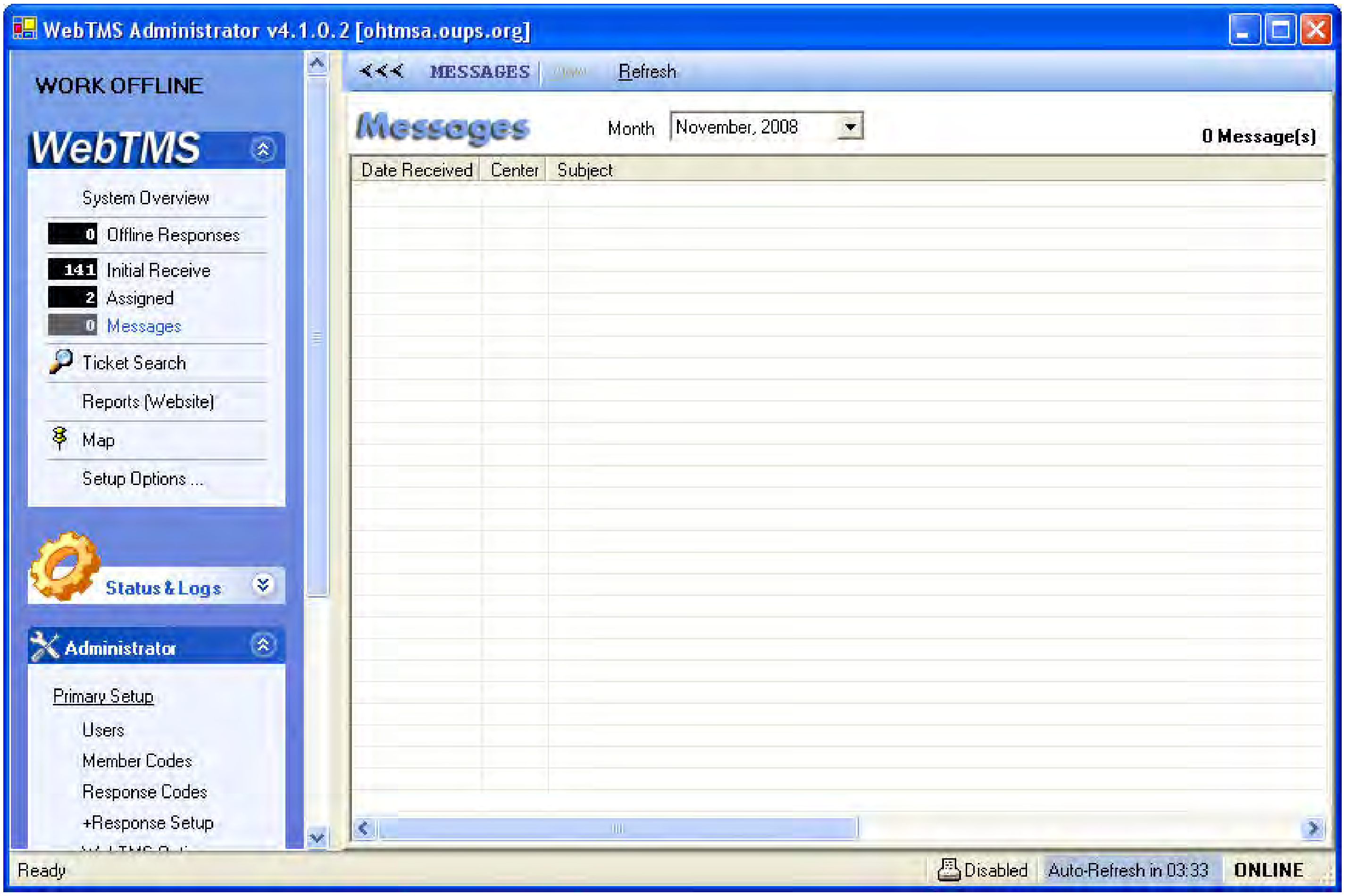
Show Queue

Clicking the ***Show Queue*** button will display the tickets and member codes that will have the selected response applied. This takes into account the member codes, stage, and possibly AL locator filters set in the *Process* selection area.



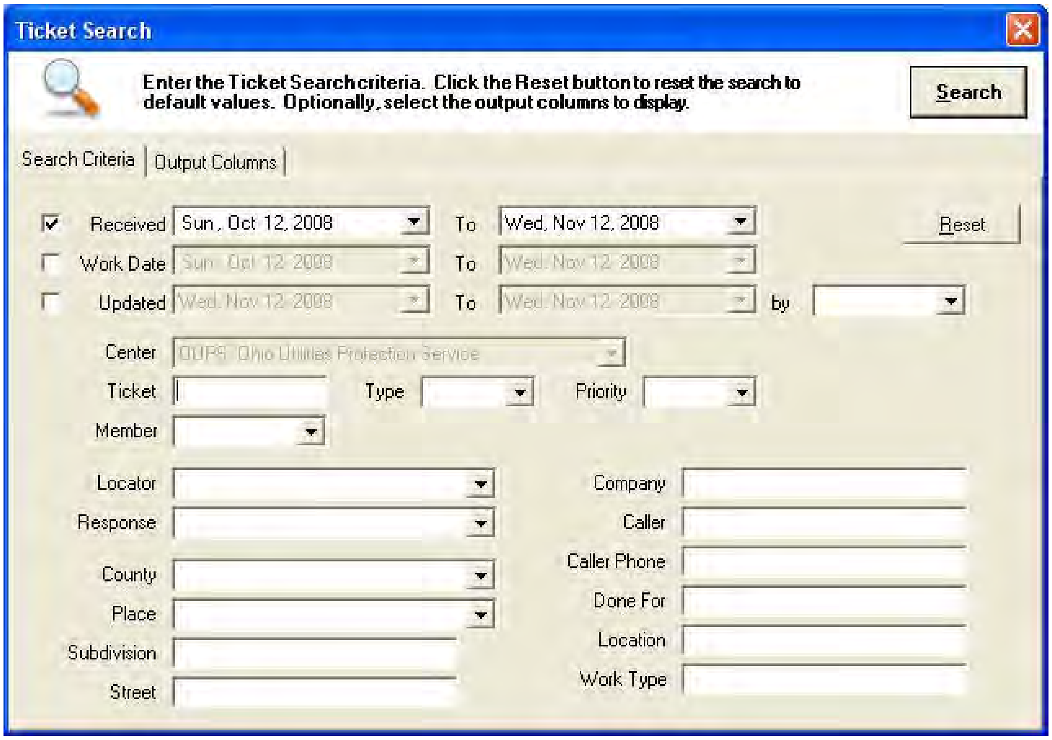
Messages

The Messages area will display Call-Center messages or anything else received via e-mail that is not a ticket or call-center end-of-day (EOD) summary. Use the Month selection box to select the month to view. Double-click a message, or highlight the message and click the View menu item to view the message.

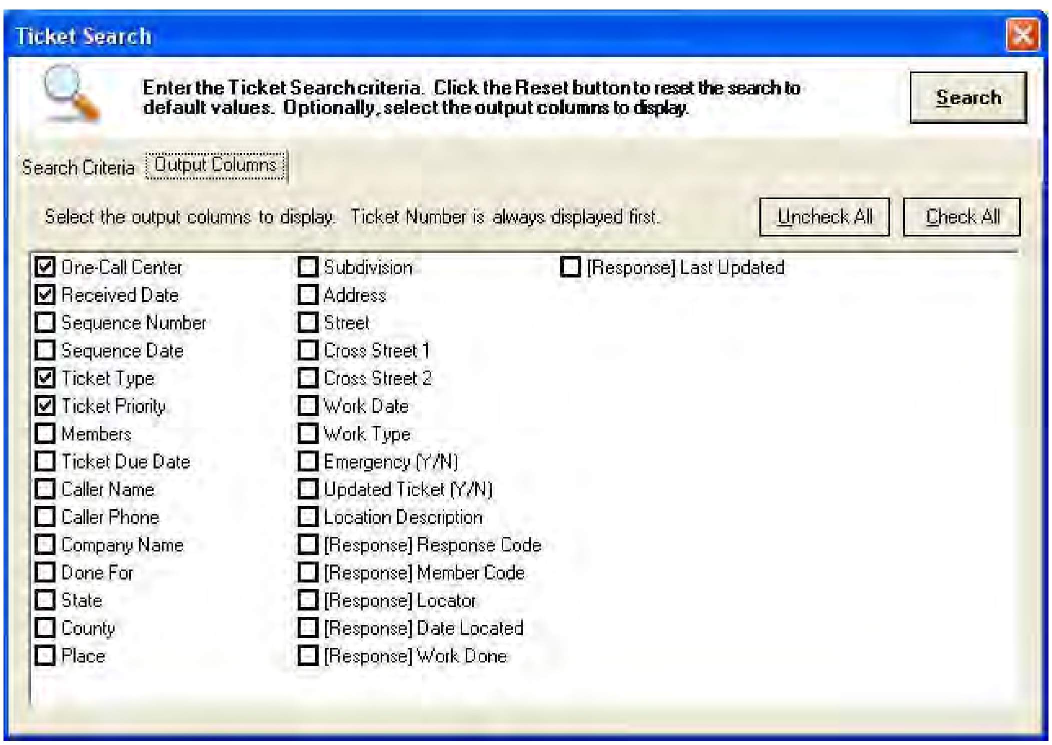


Ticket Search

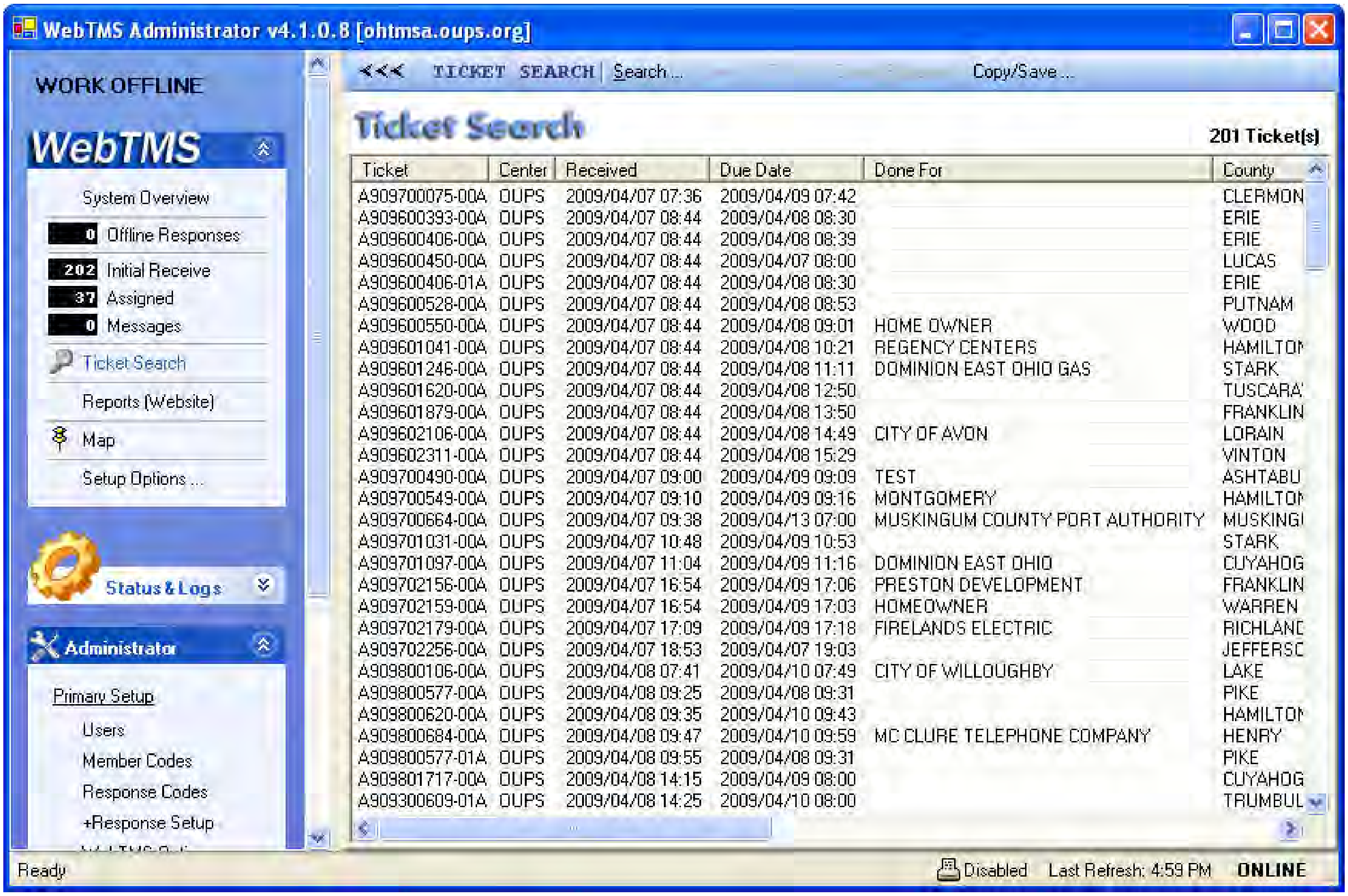
The Ticket Search window allows you to search for any ticket received, for at least the last 3 months. Archives of older data are available in Microsoft Access Database (*.mdb) format in the Archives section of the WebTMS website. Use the main search criteria window to narrow down the specific tickets you are looking for by using any combination of search parameters. Use the *Output Columns* tab to specify the columns you want to see. Click the ***Reset*** button to reset the search form.



Select all the output columns you wish to see for the matching tickets:

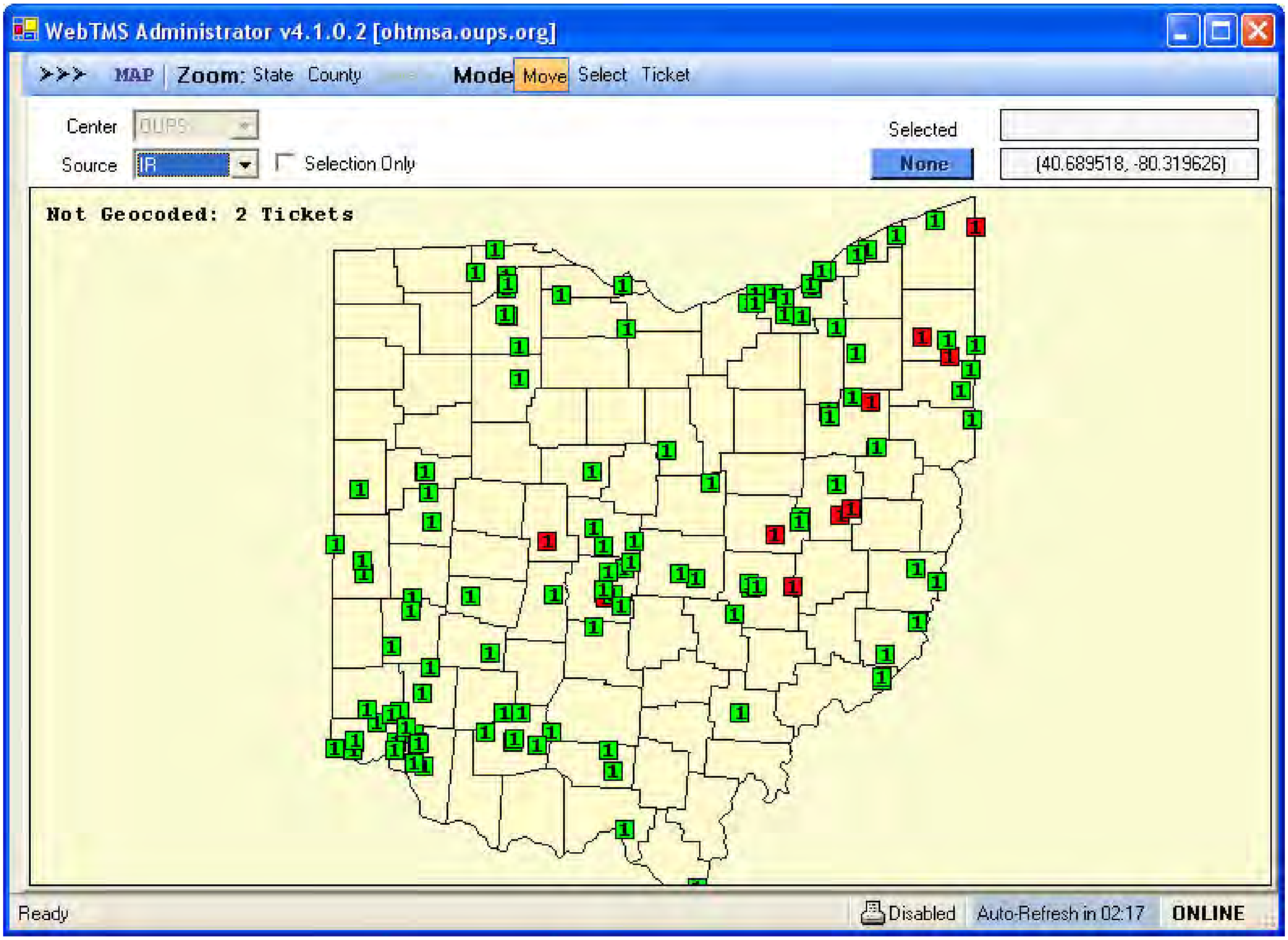


After a search has been made and matching tickets are found, they appear in the Ticket Search area. You can then View or Print any tickets you select. You can also view them on the Map window by select "Ticket Search" as the *Source*.


WebTMS Administrator v4.1.0.8 [ohtmsa.oups.org]
WORK OFFLINE
WebTMS
System Overview
0 Offline Responses
202 Initial Receive
37 Assigned
0 Messages
Ticket Search
Reports (Website)
Map
Setup Options ...
Status & Logs
Administrator
Primary Setup
Users
Member Codes
Response Codes
+Response Setup
<<< TICKET SEARCH | Search ...
Copy/Save ...
Ticket Search
201 Ticket(s)
Ticket Center Received Due Date Done For County
A909700075-00A OUPS 2009/04/07 07:36 2009/04/09 07:42 CLERMON
A909600393-00A OUPS 2009/04/07 08:44 2009/04/08 08:30 ERIE
A909600406-00A OUPS 2009/04/07 08:44 2009/04/08 08:39 ERIE
A909600450-00A OUPS 2009/04/07 08:44 2009/04/07 08:00 LUCAS
A909600406-01A OUPS 2009/04/07 08:44 2009/04/08 08:30 ERIE
A909600528-00A OUPS 2009/04/07 08:44 2009/04/08 08:53 PUTNAM
A909600550-00A OUPS 2009/04/07 08:44 2009/04/08 09:01 HOME OWNER WOOD
A909601041-00A OUPS 2009/04/07 08:44 2009/04/08 10:21 REGENCY CENTERS HAMILTON
A909601246-00A OUPS 2009/04/07 08:44 2009/04/08 11:11 DOMINION EAST OHIO GAS STARK
A909601620-00A OUPS 2009/04/07 08:44 2009/04/08 12:50 TUSCARA
A909601879-00A OUPS 2009/04/07 08:44 2009/04/08 13:50 FRANKLIN
A909602106-00A OUPS 2009/04/07 08:44 2009/04/08 14:49 CITY OF AVON LORAIN
A909602311-00A OUPS 2009/04/07 08:44 2009/04/08 15:29 VINTON
A909700490-00A OUPS 2009/04/07 09:00 2009/04/09 09:09 TEST ASHTABU
A909700549-00A OUPS 2009/04/07 09:10 2009/04/09 09:16 MONTGOMERY HAMILTON
A909700664-00A OUPS 2009/04/07 09:38 2009/04/13 07:00 MUSKINGUM COUNTY PORT AUTHORITY MUSKINGU
A909701031-00A OUPS 2009/04/07 10:48 2009/04/09 10:53 STARK
A909701097-00A OUPS 2009/04/07 11:04 2009/04/09 11:16 DOMINION EAST OHIO CUYAHOG
A909702156-00A OUPS 2009/04/07 16:54 2009/04/09 17:06 PRESTON DEVELOPMENT FRANKLIN
A909702159-00A OUPS 2009/04/07 16:54 2009/04/09 17:03 HOMEOWNER WARREN
A909702179-00A OUPS 2009/04/07 17:09 2009/04/09 17:18 FIRELANDS ELECTRIC RICHLAND
A909702256-00A OUPS 2009/04/07 18:53 2009/04/07 19:03 JEFFERSO
A909800106-00A OUPS 2009/04/08 07:41 2009/04/10 07:49 CITY OF WILLOUGHBY LAKE
A909800577-00A OUPS 2009/04/08 09:25 2009/04/08 09:31 PIKE
A909800620-00A OUPS 2009/04/08 09:35 2009/04/10 09:43 HAMILTON
A909800684-00A OUPS 2009/04/08 09:47 2009/04/10 09:59 MC CLURE TELEPHONE COMPANY HENRY
A909800577-01A OUPS 2009/04/08 09:55 2009/04/08 09:31 PIKE
A909801717-00A OUPS 2009/04/08 14:15 2009/04/09 08:00 CUYAHOG
A909300609-01A OUPS 2009/04/08 14:25 2009/04/10 08:00 TRUMBUL
Ready
Disabled Last Refresh: 4:59 PM ONLINE

Map view

The Map view will display a map view of the ticket locations. You can view all the tickets in IR, AL or from a Ticket Search. The upper left corner will display the number of tickets that are not geocoded (and so is not represented on the map.)



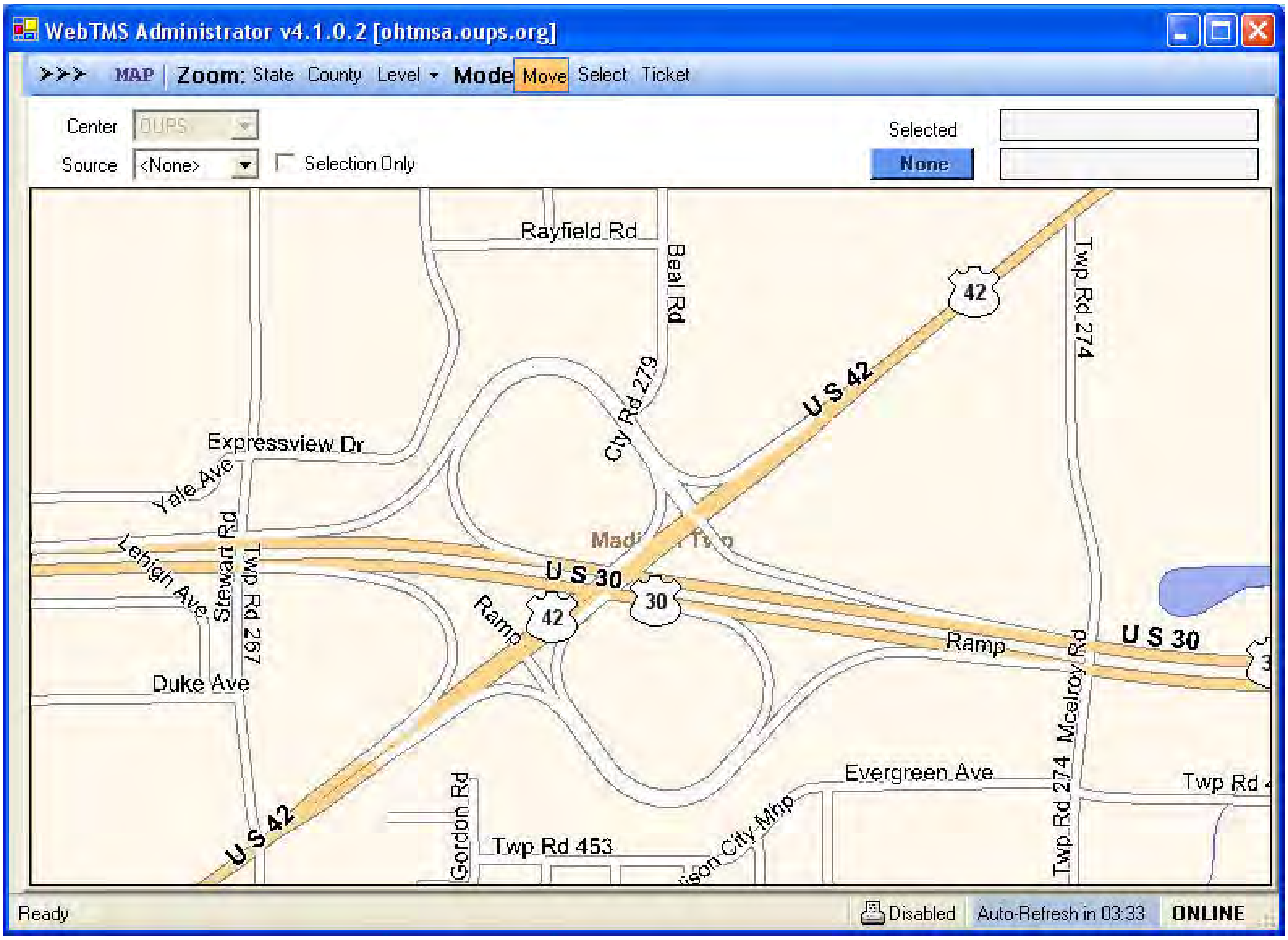
Zoom: State **-** Click the State button to zoom out to the full state.

Zoom: County **-** Click this button to enable it, then click inside the county you wish to zoom into.

Zoom: Level **-** Click this button to select a zoom level, available after you have zoomed into a county.

MODE - Move **-** This mode is for moving around the map with the mouse. Clicking a point on the map will re-center the map display at that point. To zoom into an area, click and hold the mouse at one point, and move the mouse to create a zoom box. Using your left mouse button will zoom into that area. Using the right mouse button will zoom out.

MODE: Ticket **-** In this mode, use the mouse cursor and click on a ticket on the map to open the Ticket window.

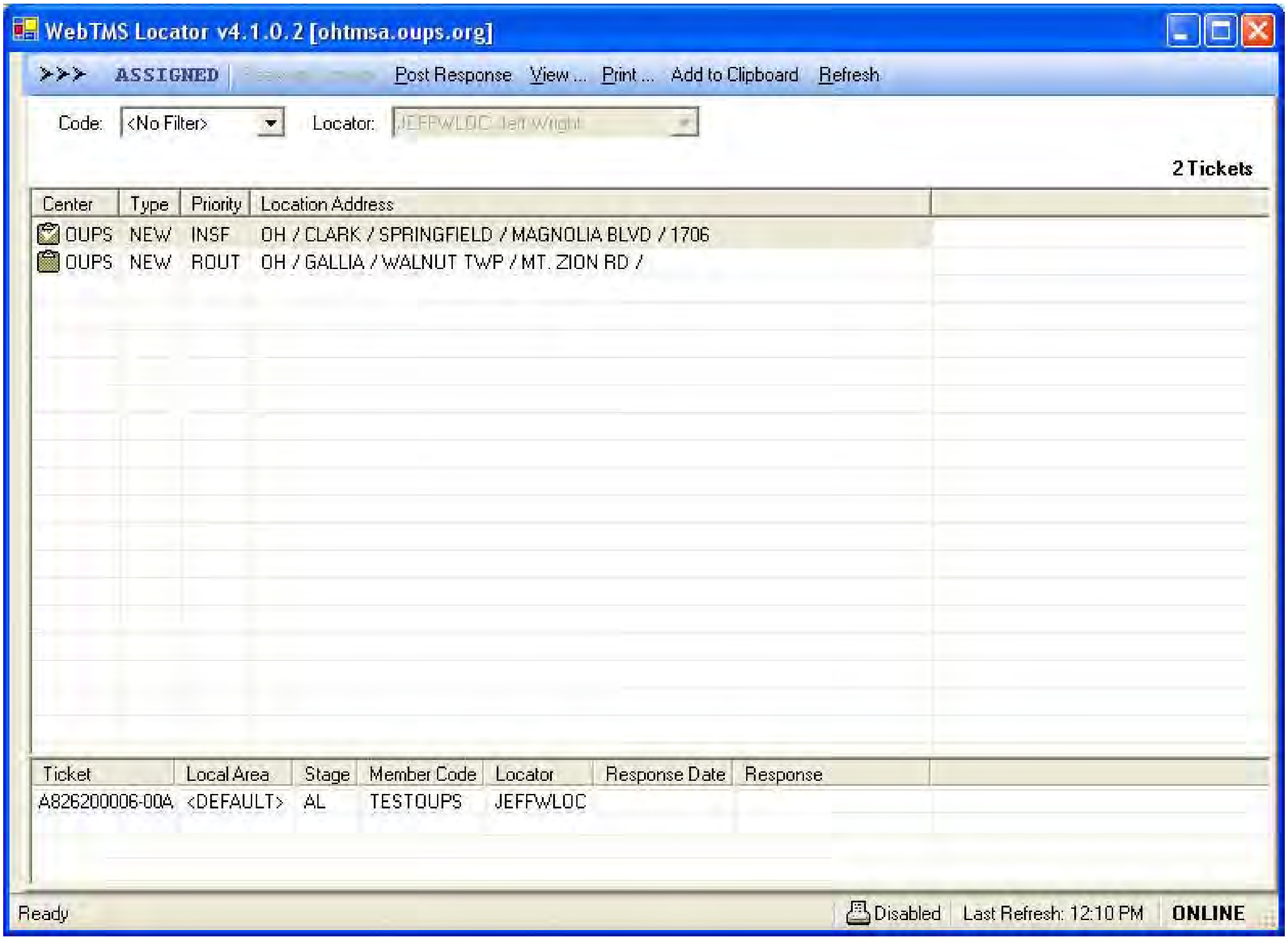

WebTMS Administrator v4.1.0.2 [ohtmsa.oups.org]
>>> MAP | Zoom: State County Level Mode Move Select Ticket
Center OUPS
Source <None>
Selection Only
Selected
None
Rayfield Rd
Beal Rd
Twp Rd 274
US 42
42
Cty Rd 279
Expressview Dr
Yale Ave
Stewart Rd
Lehigh Ave
Twp Rd 267
U S 30
30
Ramp
Duke Ave
Ramp
U S 30
Mcelroy Rd
Evergreen Ave
Twp Rd 274
Gordon Rd
Twp Rd 453
U S 42
Ready
Disabled
Auto-Refresh in 03:33
ONLINE

Part 12 – Locator Tasks

- **Assigned Window**
- **Clipboard Window**

Locator: Assigned window

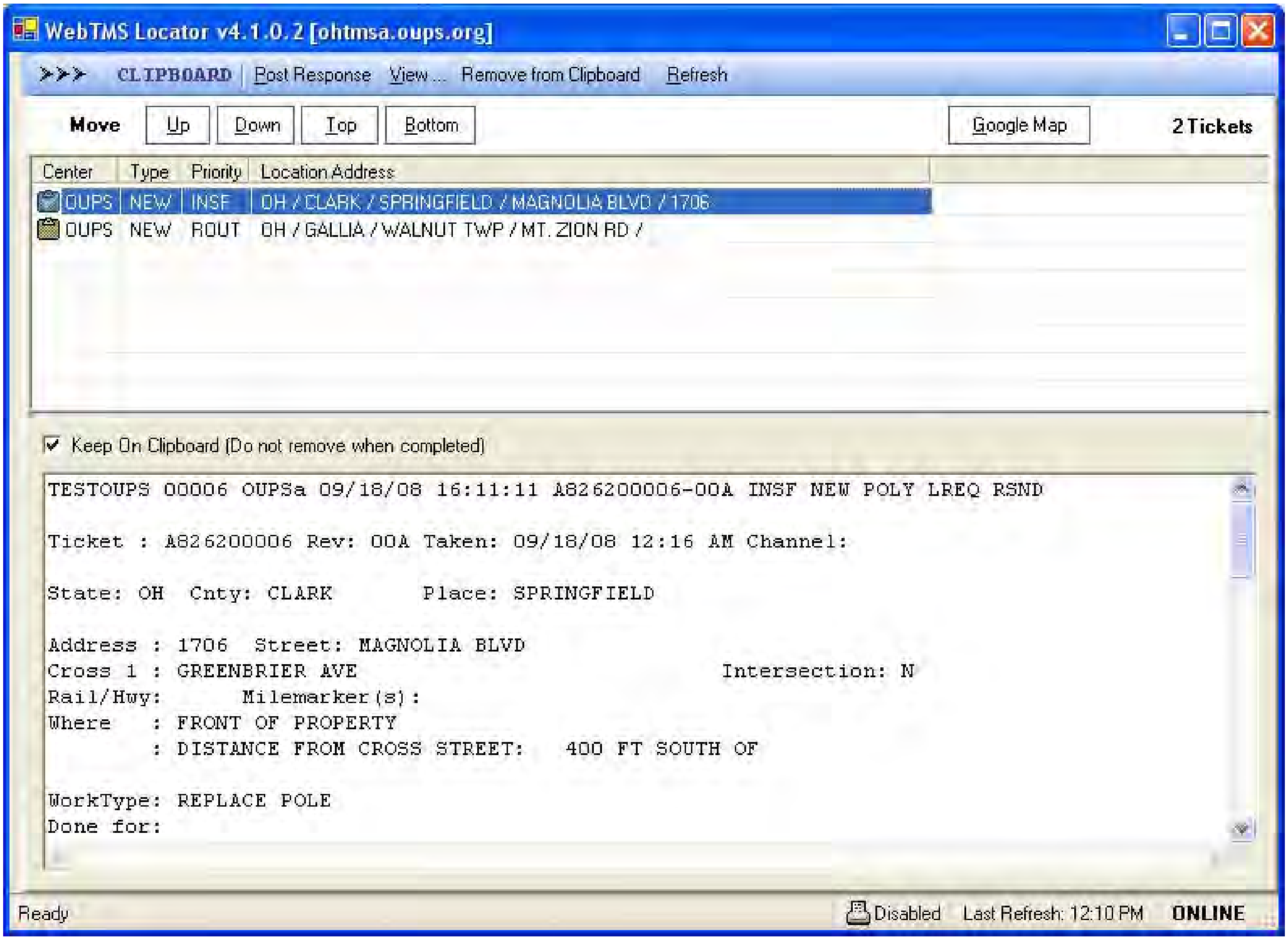
The locator Assign window is similar to the general Assigned window, but has features and limitations specific to locator accounts. The locator view will by default show only tickets assigned to them. Ticket visibility settings can be managed in the WebTMS Options window. The clipboard window is available to locator accounts, allowing them to download a snapshot of the ticket for use while offline. Select one or more tickets and click ***Add to Clipboard*** to download the tickets onto the clipboard; each downloaded ticket will have a clipboard icon next to it.



Locator: Clipboard window

Locator accounts have a clipboard window that allows them to download the full ticket. Without an internet connection, they can then view and respond to the ticket, with the responses going to the Offline Responses. These responses will then be posted the next time the client establishes a server connection.

From the Assigned screen, the locator can highlight one or more tickets and either click ***Add to Clipboard*** or drag them over to the clipboard icon on the left-side menu (not shown in the screenshot below.)



Move Up/Down/Top/Bottom - Allows you to reorder selected tickets on the clipboard.

Google Map - Select one ticket or two tickets. If one ticket is selected, it will open Google maps for the specified address. If two tickets are selected, it will open Google maps and try to route between the two ticket addresses.

Post Response - Opens the Post Response window to submit responses in either online or offline mode.

View - Displays the Ticket window for the selected ticket. If offline, then the map will not be available and responses cannot be edited. However, you can respond to the ticket and edit the response in the offline responses window.

Keep On Clipboard - This option allows you to keep an ongoing ticket on the clipboard after a response has been posted. Normally, after a ticket is closed out, it will disappear from the clipboard. This option overrides that behavior.