

## ITICnxt Manual



## **Table of Contents**

2	Introduction to ITICnxt	27	Radius Excavation Tool
4	ITICnxt Quick Start Guide	29	Route Excavation Tool
7	Step 1. Mark Location	31	Property Excavation Tool
11	Step 2. Write Instructions	33	Street Excavation Tool
14	Step 3. Review & Submit	35	Other Excavation Tool
16	Main Menu	38	Locator Tickets
18	My Tickets Menu	40	Change Status/Locator Menu
20	User Settings	42	Admin Menu
20	User Profile Menu	43	Locators Menu
21	Application Settings Menu	44	Polygon Auto-Assignments
22	Job Profiles	46	Rule Based Auto-Assignments
24	Advanced Mapping	48	Locator Ticket Alerts
24	The Map	51	Custom Responses
25	Map View Buttons	53	Reports
26	Advanced Search	54	Quick Notes Menu

Table of Contents 1

# Introduction to ITICnxt

## Welcome to ITICnxt – the future of online ticketing.

Online ticketing systems have required users to spend their time entering text information before allowing them to do the all-important work of finding their dig site on a map. As we considered ways to improve the online ticketing process, we became convinced that if users identified their dig site on the map first, nearly all text entry could be automated. As our research in modernizing online ticketing continued, we found other ways to save the user time and effort by building the notification center's business rules into the system.

One of the biggest differences you will notice from the very first time you use ITICnxt is that identifying your dig site starts, not ends, with an aerial photo of your work area. After minimal text entry, easy-to-use tools allow you to specify each individual dig location within your work area. Once you have specified all the work areas, ITICnxt automatically divides or combines them into the appropriate number of tickets, each one complete with text-based location information. That's right: ITICnxt presents you with completed tickets for your review.

We believe ITICnxt will change the way people think about damage prevention. For the very first time, ITIC:

Starts the process with an aerial photo. Use the width of streets, the location of buildings, and the location of other geographic features to help identify where you are digging in relation to the actual conditions at your work site.

Uses the information contained in the notification center's base map. ITICnxt helps you complete your ticket, allowing you to fully concentrate on identifying the precise location where you will dig instead of entering text.

Gives you the means to <u>precisely</u> define the area in which your work will take place.

We've eliminated the need to go broad or over-cover your work site. Each excavation site you define will be compared with the notification center's database so only affected operators are notified.

Introduction to ITICnxt 2

#### **Definition of Terms**

**Session:** A period of user interaction with ITICnxt characterized by defining one or more excavation entities which subsequently results in the creation of one or more tickets.

**Excavation Entity:** A circle, route, parcel, GPS generated polygon or free-hand polygon representing an area of excavation (see below). The ITICnxt user creates a discrete excavation entity during a session as they identify the limits of an area of work. Users can create as many excavation entities as necessary during a single session.

**Route:** An excavation entity created when a user selects a series of points on a map that form a continuous line. The line is converted into an excavation entity based on the width specified by the user.

**Circle:** An excavation entity created when a user selects a point on a map that is then converted into a circle based on the length of the radius requested by the user.

Parcel: An excavation entity created when a user selects part or all of a parcel of property. Parcel size is often associated with a single address and does not include the road right of way. Users can extend parcel size with the parcel tool.

**NOTE:** Available parcel data may be limited in some areas.

Turn to the next page to get started.

### **ITICnxt Quick Start Guide**

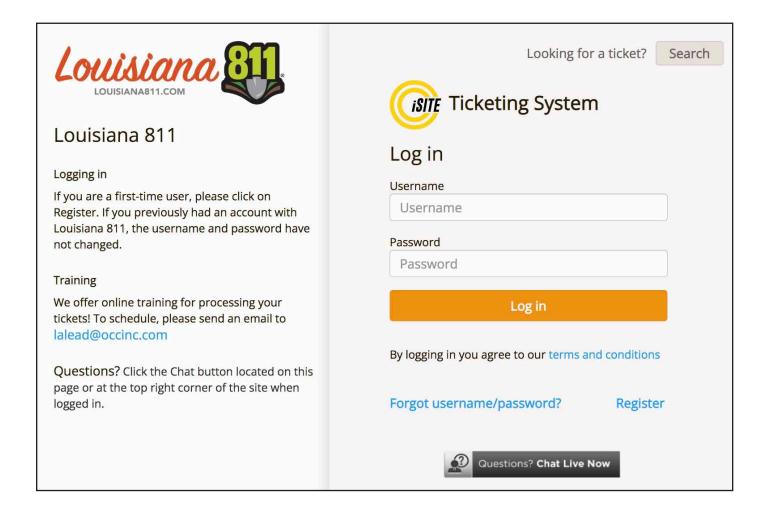
#### **Logging In**

To access ITICnxt point your web browser to https://la.iticnxt.occinc.com/

If you do not already have an ITICnxt login, click the **Register** button located below the login and password fields.

If you have forgotten your login information, you can also click the **Forgot username/password?** link, also located below the login and password fields.

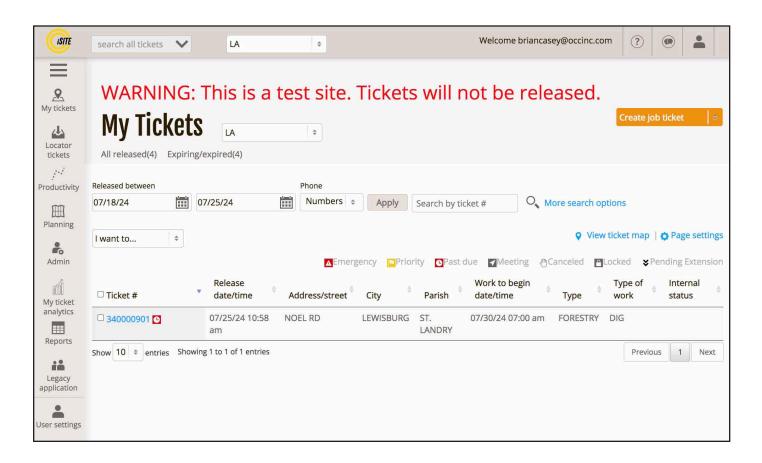
Once you enter your password and login and hit return, you'll be logged in.



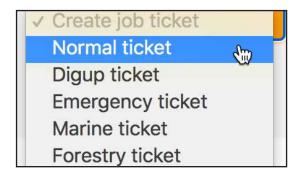
ITICnxt Quick Start Guide 4

#### **Landing Page**

To get started click the My Tickets button. Use the state drop-down menu to select LA.



Click the **Create job ticket** menu and select **Normal Ticket.** 



The **My Tickets** module contains a database of all tickets you have filed with your account.

ITICnxt Quick Start Guide 5

#### **Workflow Process**

There are three major steps in the locate filing process:

#### Step 1 – Mark Location

Here you will locate and map out your work area(s) by drawing one or more shapes on the map (excavation entities).

#### Step 2 - Write Instructions

Here you will verify the automatically generated ticket information, and make any additions or alterations as necessary.

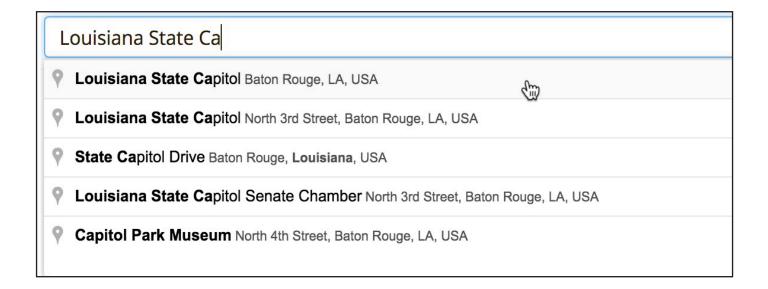
#### Step 3 - Review & Submit

Here you will review all of your ticket information and submit the locate request(s) to be sent directly to the affected facility operators or to the call center for review.

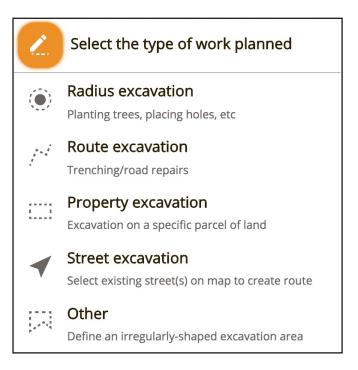
ITICnxt Quick Start Guide 6

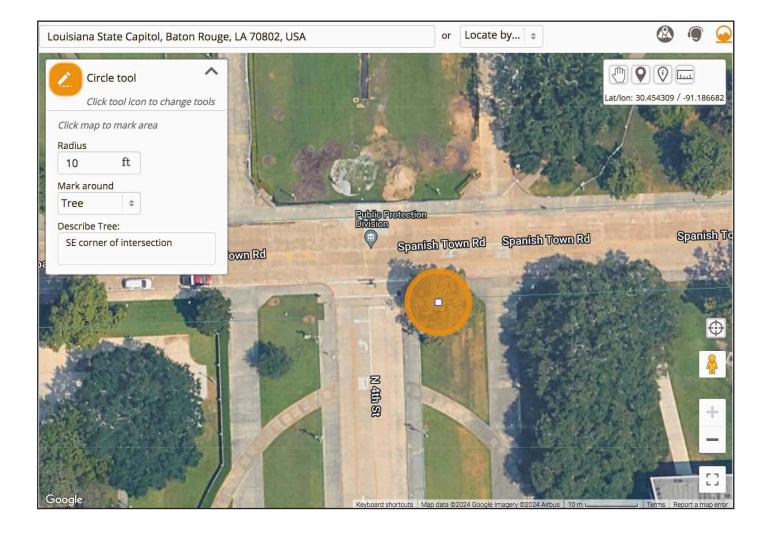
#### **Step 1. Mark Location**

First, you will need to find your worksite on the map. Enter an address, building name, or city/place name in the **Search** field.



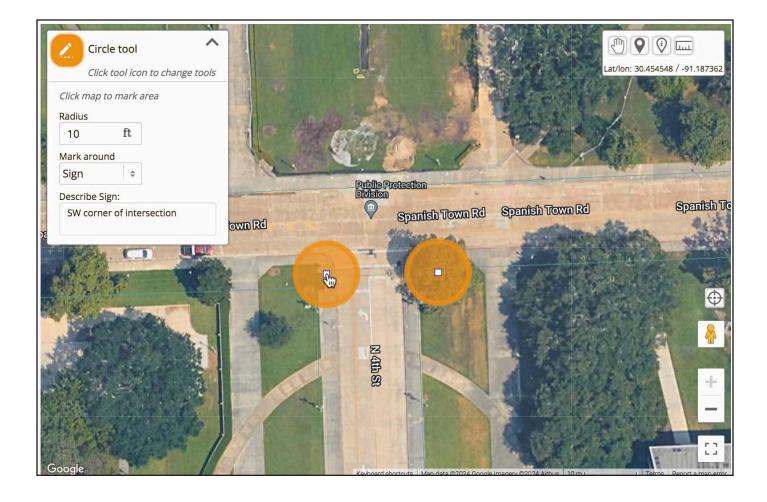
Once you have found the correct location, select a drawing tool from the **Drawing Tool** menu.



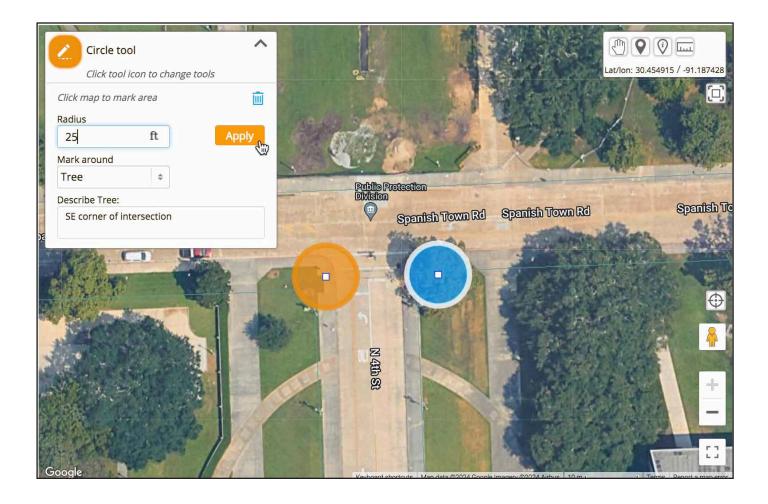


When you select a drawing tool you will be prompted to enter information about the worksite you intend to map out. The required information will vary depending on which tool you choose. Be as accurate as possible.

After entering the required information, place an excavation entity by clicking on the map.



You can continue placing excavation entities on the map. Make sure to update the excavation entity's information if necessary.



If you make a mistake, you can edit or delete any entity in the current session by clicking on it. (You'll need to make sure you don't have a drawing tool selected.)

Click Apply to apply your changes to the selected Excavation Entity. Click the excavation entity.

When you have finished mapping your worksite(s) click the **Next** button.

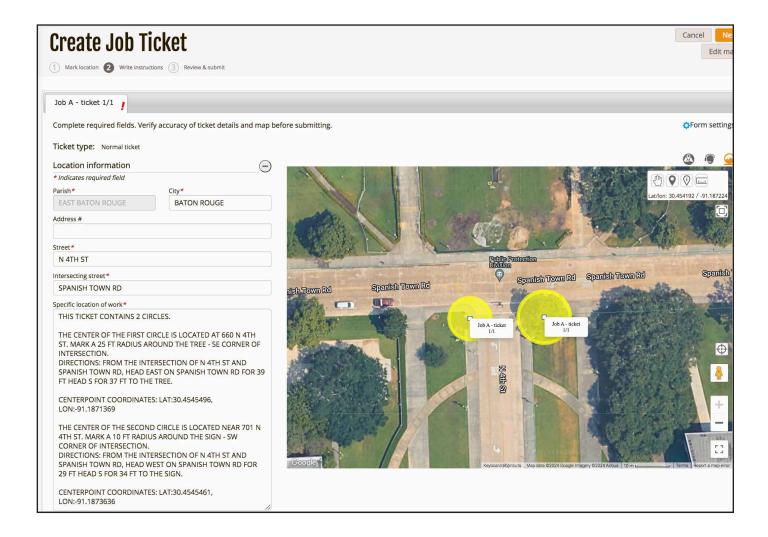
This will take you to **Step 2.** 



#### **Step 2. Write Instructions**

ITICnxt calculates the most efficient way to break up or combine the excavation entities you have created and assign them to locate requests. ITICnxt automatically applies the business rules as established by Louisiana 811 to make this determination. The tickets appear at the top of the screen. Each tab represents a ticket.

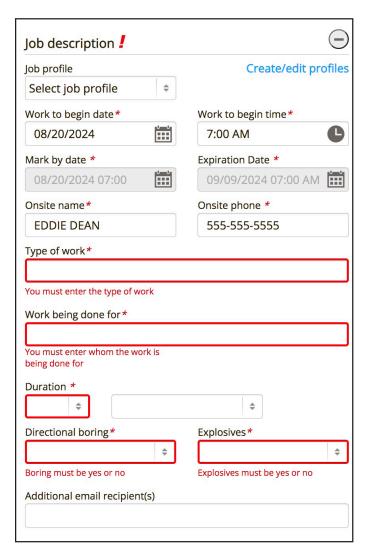
ITICnxt enters **Location Information** based on the excavation entities you drew on the previous page (you will need to manually select which island the work is taking place on). Carefully review all information in this section, paying particular attention to the **Location of Work** – if ITICnxt has split up your work area into multiple tickets, only describe the area of excavation that corresponds to the mapping on the current ticket/tab.

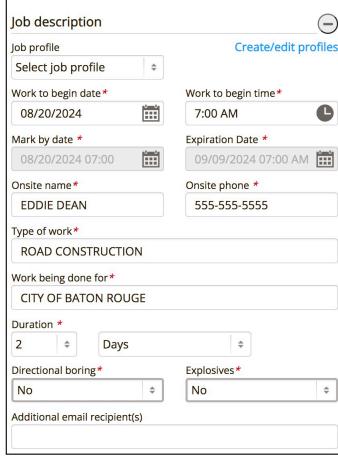


Step 2. Write Instructions

The **Location of Work** should contain explicit marking instructions and driving directions from a nearby intersection. Read both carefully and revise if needed. Both the marking instructions and driving directions must match the ticket's corresponding mapping (shown on the left side of the page). If you need to re-map the area click the Edit map button.

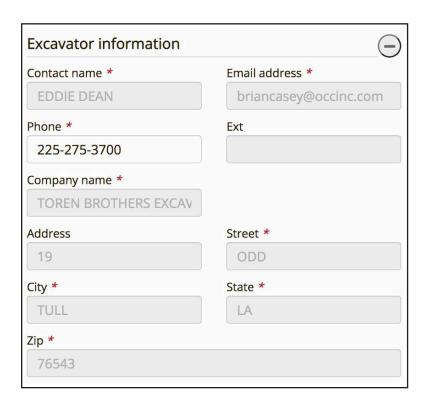
The **Job Description** is for describing the nature and method of excavation, as well as the time frame of the job. If you have an alternate/field contact person, you can list their information in this section.





Step 2. Write Instructions 12

**Excavator Information** is drawn from your User Profile. Make sure that your contact information is up to date.



When you are certain all ticket

information is accurate, tab over to the next ticket and repeat the process. Once you have completed and reviewed all tickets in the session click the Next button.

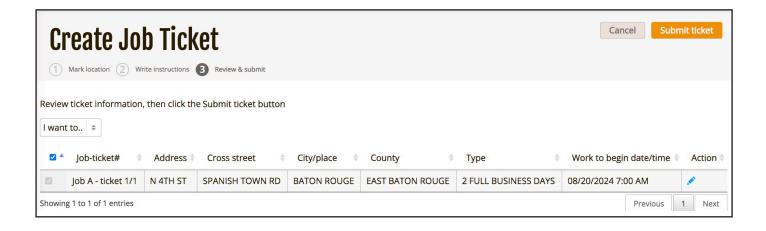
This will take you to **Step 3.** 

Step 2. Write Instructions

#### Step 3. Review & Submit

Step 3 is where you conduct a final review of your tickets and submit them to the call center for processing. This is your last opportunity to make changes to the ticket(s). Review the information on each ticket carefully. If everything is correct make sure that each ticket's corresponding **Checkbox** is checked, then click the **Submit Ticket** button. This will transmit the ticket(s) to the utilities, or to the call center (if any manual changes have been made) for review.

You can also choose to edit  $ightharpoonup^{\circ}$  , or save  $ightharpoonup^{\circ}$  the ticket(s).

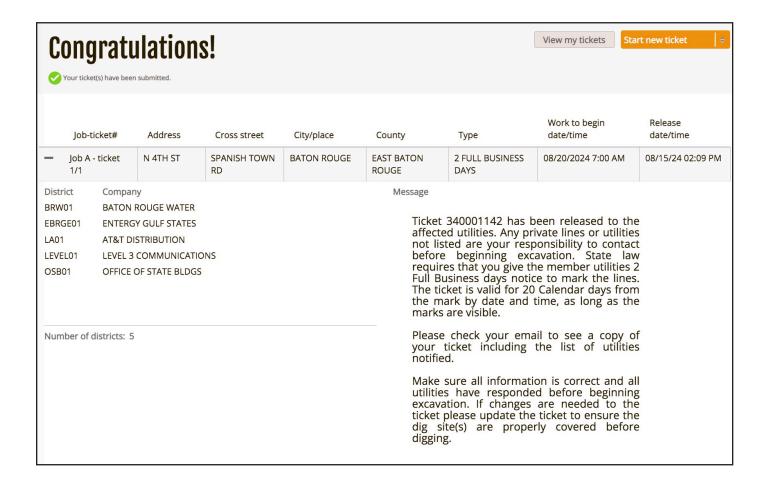


Step 3. Review & Submit 14

#### **Utility Notification List**

You have successfully submitted your ticket(s).

You will be presented with the **Utility Notification List**. This page contains a complete list of the Facility Operators who will be notified as a result of your ticket(s).



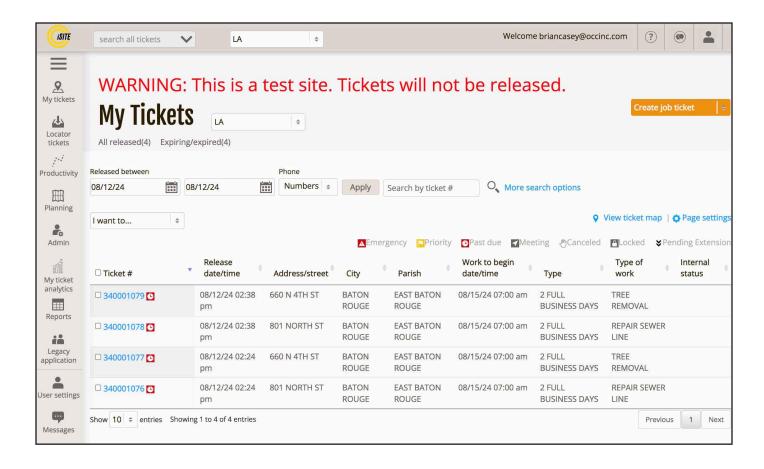
This is the end of the Quick Start Guide.

Step 3. Review & Submit 15

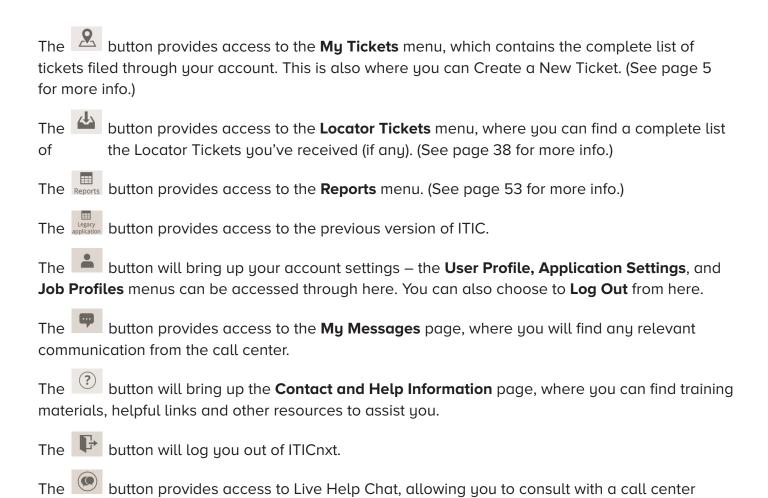
### Main Menu

Upon logging in to ITICnxt you will be presented with the main ITICnxt menu, as well as your default starting module (My Tickets, Locator Tickets). (See page 21 to see how to change your default module.)

At the top of the screen you can access the ticket search function (formerly Search & Status). As usual, numerous search parameters are available.



Main Menu 16

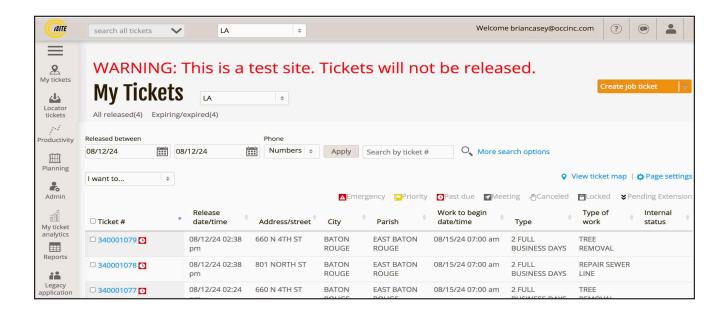


professional directly.

Main Menu 17

## My Tickets Menu

The **My Tickets** menu contains all locate requests you have previously filed. You can filter or sort this list in a number of ways using the menus at the top of the page. The state dropdown menu allows you to navigate between different states you operate in. The date range menu will limit the ticket list to those tickets filed within a specific date range.



Find a specific ticket using the Search by ticket # option. Clicking the More Search Options link will bring up a list of filtering criteria based on specific information on the tickets, such as the address, street name, or type of ticket.

Clicking View ticket map will display all currently listed tickets on the map.

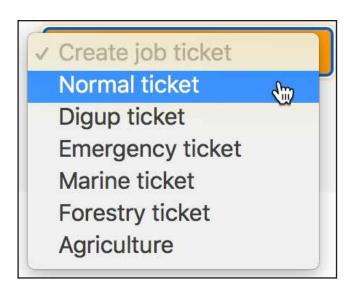
Accessing the Page settings menu will allow you to customize what information is displayed for each ticket in the **My Tickets** menu. Click on a ticket number to view the individual ticket.

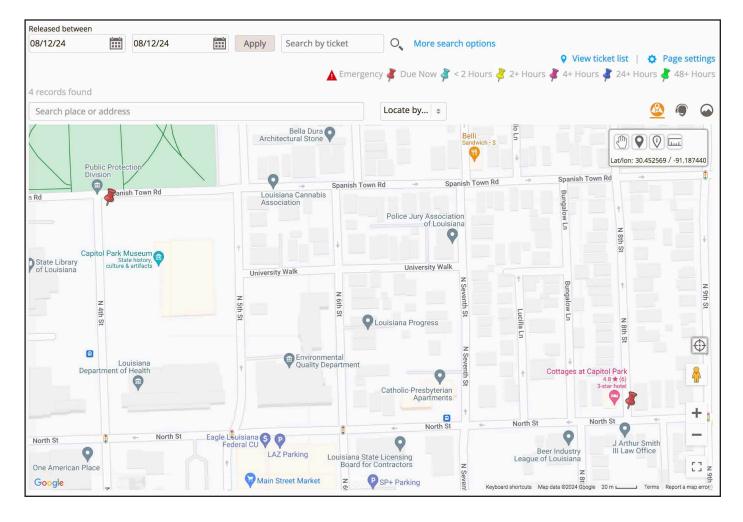
The allows you to select a ticket action to perform on the selected ticket (2nd Request, Cancel, or Update).

To use this function, make sure each relevant ticket is "checked" (e.g. 560005810 ), then choose the ticket action from the "I want to..." menu. Then click the button that appears next to the "I want to..." menu (e.g. Update tickets ) to begin the process.

Access the Create job ticket menu to begin filing a new locate request. (See page 5 for more info.)

My Tickets Menu 18



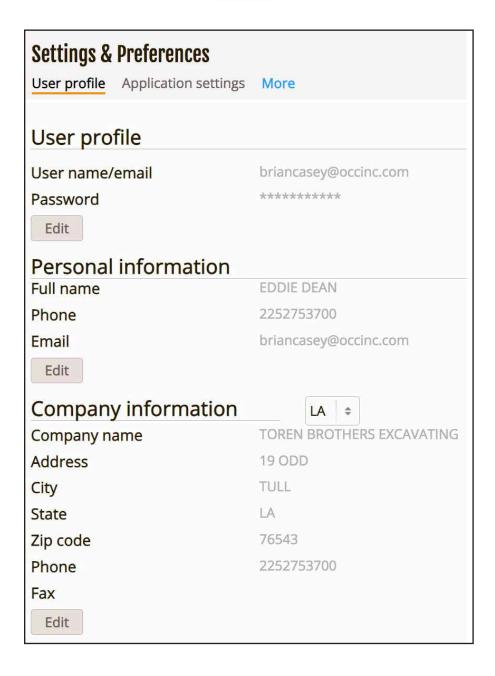


My Tickets Menu 19

## **User Settings**

#### **User Profile Menu**

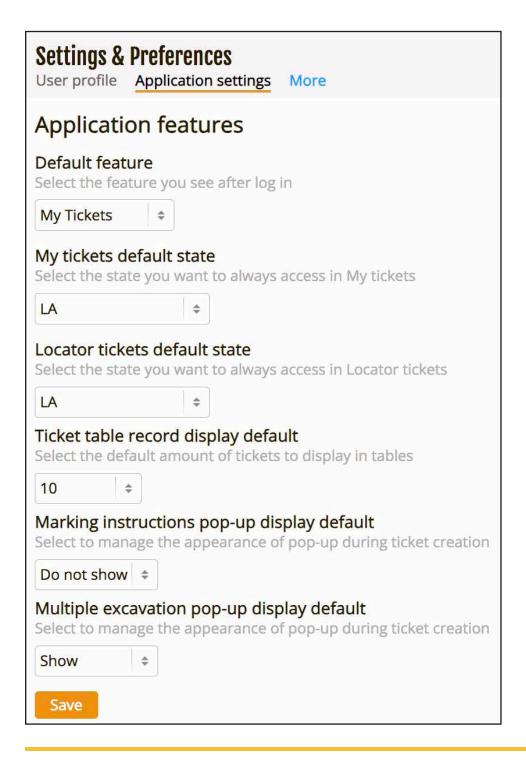
The **User Profile Menu** contains your ITICnxt username and password, as well as contact information for you and your company. You can edit any of the information in this section by clicking the corresponding Edit button.



User Profile Menu 20

#### **Application Settings Menu**

The Application Settings menu allows you to adjust your landing screen upon logging in to ITICnxt, as well as the default state you're presented with when initially accessing the My Tickets and Locator Tickets sections. Use the drop-down menus to make any necessary adjustments, and click the Save button to save your changes.



#### Job Profiles

The Job Profiles feature allows you to create templates that can be used to automatically fill in commonly used information on multiple locate requests. The Job Profiles menu can be accessed through the User Settings menu.

The Job Profiles menu will contain all Job Profiles currently saved to your account.

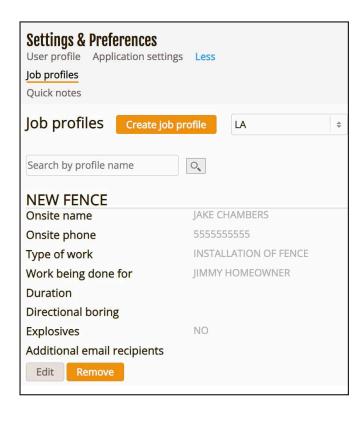
To create a new Job Profile click the

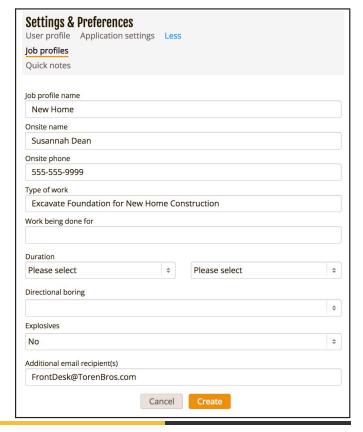
All fields are optional. You can enter as little or as much information as you like. When you have finished filling out all necessary fields click the **Create** button.

button.

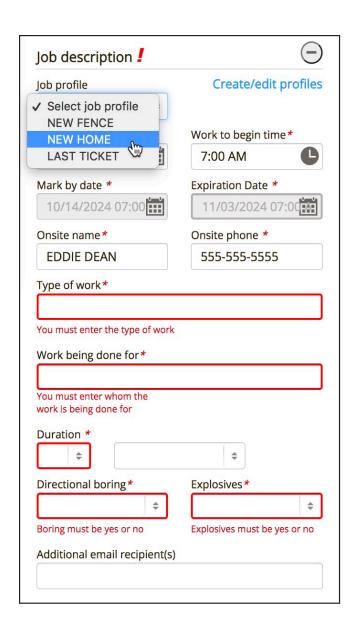
Now you can use the new profile when you reach Step 2 (**Write Instructions**) of the ticket creation process. Click the **Select Job Profile** menu found at the top of the Job Description section. Selecting a job profile will automatically fill in relevant fields with the data saved in the job profile you chose.

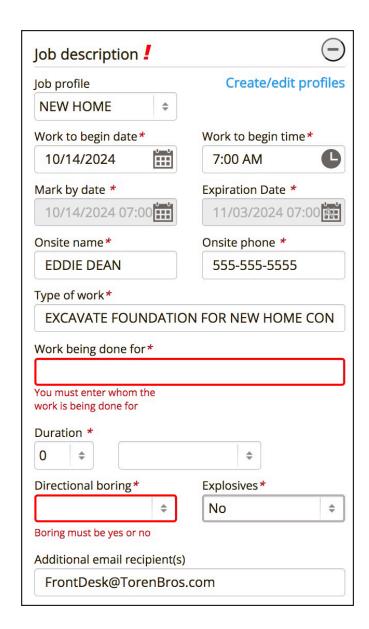
You can also access the **Manage Profiles** menu by clicking the Create/edit profiles link. This menu allows you to create, edit or delete job profiles without having to abandon the ticket(s) you are currently working on.

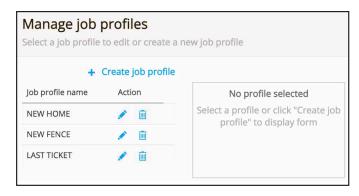




Job Profiles 22







Job Profiles 23

## **Advanced Mapping**

#### The Map

The map interface is where you will locate and map out your work areas for locate requests. The map contains a number of tools to help you precisely and accurately map out your locate requests.



#### **Starting Address Location**

Use this search field to find an address, or the name of a business or municipal building that can serve as the starting point for your excavation(s).

#### **Advanced/Alternate Search**

Use the Advanced Search tool to find locations that do not appear in the Starting Address Search. You can use the drop-down menu to search by more specific address information, coordinates (GPS, Lat/Long, etc.), or the mapping from a previous locate request. (See page 26 for more info.)

Advanced Mapping 24

#### **Map View Buttons**

Change the image of the map to the Call Center map view, Google map view or Satellite view (pictured). Satellite view is the recommended map view when creating excavation entities.

#### **Tool Box**

**Stop** – Clicking this will cease whatever mode you are currently using, such as the **Measure** tool or the **Other** drawing tool.

**Placemark** – Place a pin-mark on the map for later reference with this tool. This can be very helpful when used in conjunction with the Measure tool. **NOTE:** Placemarks only last the duration of the session in which they are created.

**Identify** – Identify map features that do not display a name (such as roads, highways, etc.) with this tool. The name will appear just above the Starting Address Location search bar, next to "Highlight." The Identify tool is also useful for identifying the address range of a specific block. **NOTE:** Zooming in on the map makes more names visible.

**Measure** – Use this tool to measure the distance between points on the map. Get in the habit of using this tool regularly to ensure proper coverage of excavation areas and confirm distances along roads. The measurements will appear at the bottom of the Tool Box. "Segment Length" refers to the distance between the last point you placed on the map and your cursor's current location. "Total Length" refers to the distance between the first point you placed on the map and your cursor's current location.

**Lat/lon** – Displays the latitude/longitude coordinates of your cursor's current location.

#### **Drawing Tool Menu**

This drop-down menu contains all of the drawing tools you will need to create excavation entities. (See page 27 for more info.)

#### Google Street View ("Pegman")

Click and drag Pegman on to the map to open Google street view.

#### Zoom In/Out

Use these buttons to zoom in or out on the map.

#### Full Screen Mode

Click this button to enter full screen mode. Press Esc to exit.

Advanced Mapping 25

#### **Advanced Search**

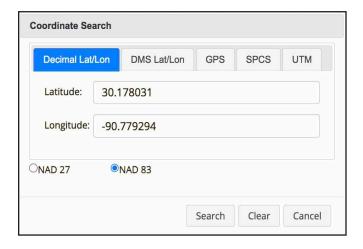
Use the **Advanced Search** menu (AKA the "**Locate By...**" menu) if you are unable to find your worksite with the Starting Address Location search.

**Advanced Street Search** – can be used to search for roads and intersections.

**Coordinate Search** – can be used for latitude/longitude, GPS, and other coordinate type formats.

**Prev Ticket Search** – can be used to show the excavation entities from previously filed tickets.







Advanced Mapping 26

#### **Radius Excavation Tool**

The **Radius Excavation** tool allows users to create circular excavation entities with a predetermined radius. The Radius tool is an excellent choice for jobs involving pole installation, tree planting, or any other type of work where a circle best describes the work area. You can create as many circle entities as needed.

First, access the Drawing Tools menu and choose the Radius Excavation tool.

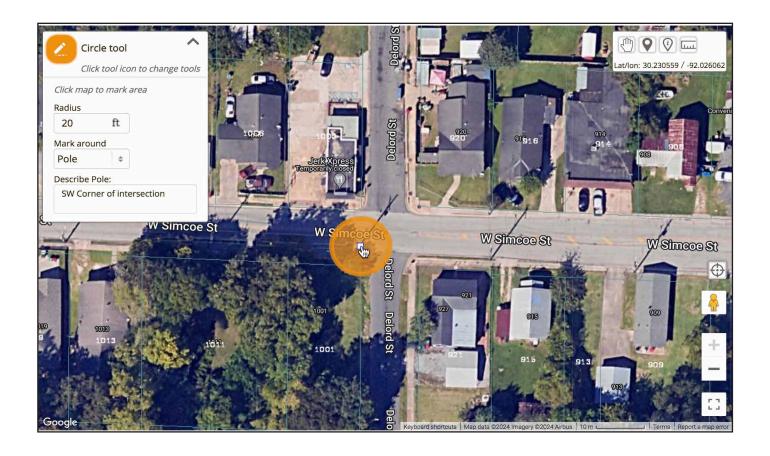
Next, enter the radius (in feet) needed to contain your work site.

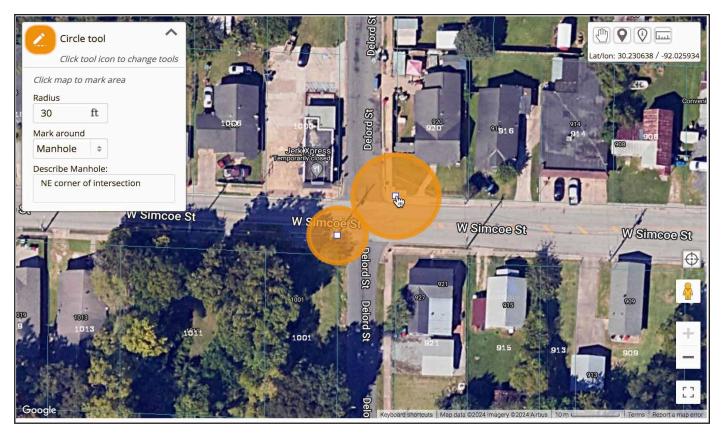
Choose an option from the "Mark around" drop-down list (if none of the provided options fit your type of excavation, choose "Other").

Now you can place the circle entity by clicking on the map.

You can continue placing circular excavation entities by clicking on the map. Make sure to update the entity's marking instructions if necessary.

Radius Excavation Tool 27





Radius Excavation Tool 28

#### **Route Excavation Tool**

The Route tool allows users to create long, narrow excavation entities. The Route tool is an excellent choice for defining an excavation area when trenching, performing road repair/replacement, or any other type of work involving a long, narrow excavation area. You can create as many route entities as needed.

First, access the Drawing Tools menu and choose the Route Excavation tool.

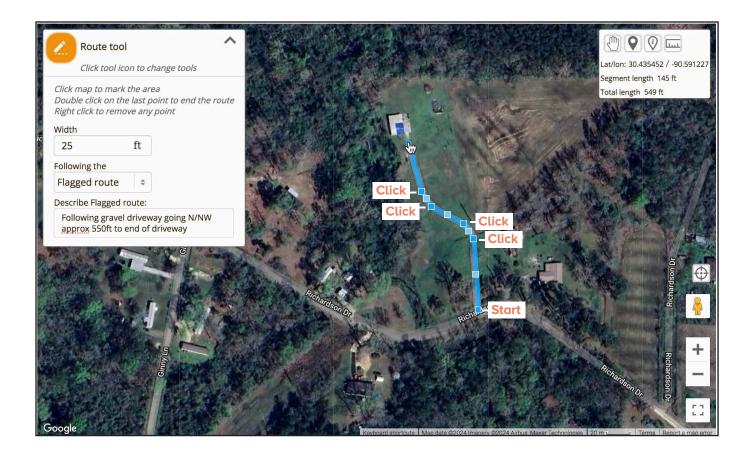
Next, enter the width (in feet) needed to contain your work site.

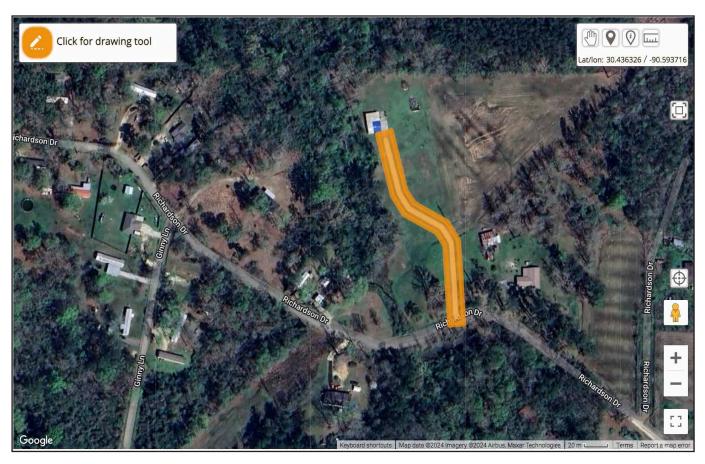
Choose an option from the "Following the" drop-down list. (if none of the provided options fit your type of excavation, choose "Points in the Route".)

Now click on the map where you would like to begin your route. Move the mouse to the next turning point in your route and click again. Continue this process until your entire route has been covered, then double-click on the final point in your route.



Route Excavation Tool 29





Route Excavation Tool 30

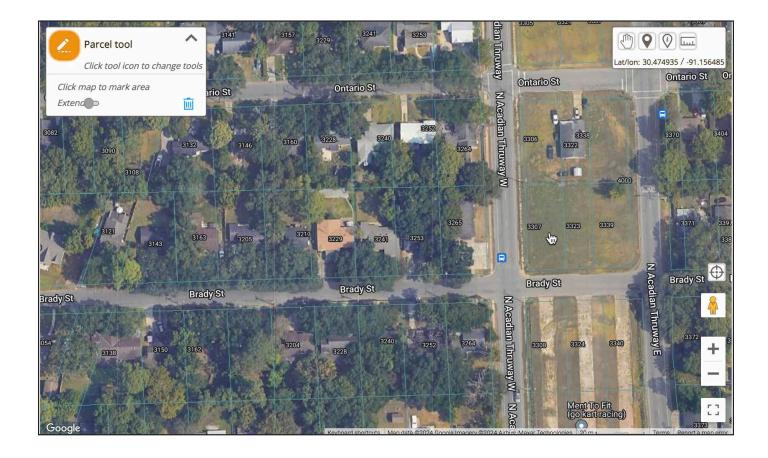
#### **Property Excavation Tool**

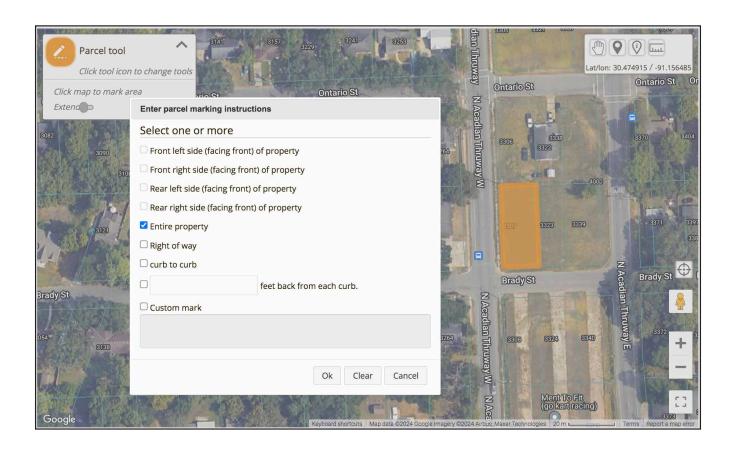
The **Property Excavation** tool allows users to create excavation entities based on available parcel data. You can create as many Property entities as needed. (The Property Excavation tool will only be visible in areas where parcel data is available. Also, the Property Excavation tool will only appear if you are zoomed in close enough on the map. If the Property Excavation tool is not available, first ensure you are zoomed in enough. If still unavailable, please choose a different tool that will contain your entire area of excavation.)

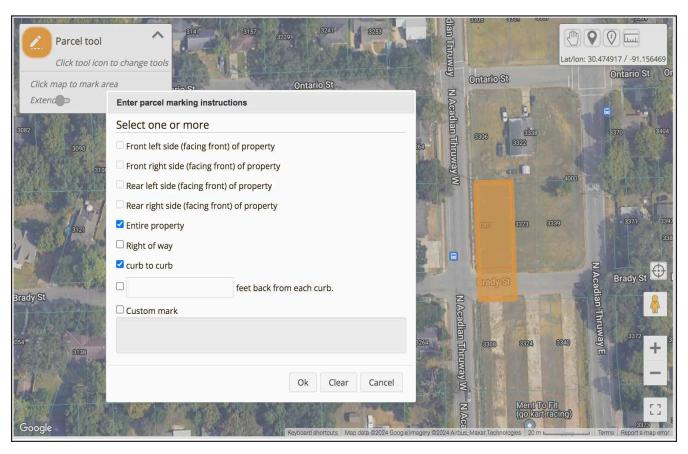
First, access the Drawing Tools menu and choose the **Property Excavation** tool.

Next, click on the address/property where your work will take place. If parcel data is available, you will be presented with the Parcel excavation menu. Review the list and choose the best option(s) for your worksite. Then click OK. If you need to include additional marking instructions, choose the Custom Mark option and enter those instructions.

If you are working in the street or across the street from the address be sure to click "Right of Way," "Curb to Curb," or "\_\_\_\_\_ ft back from each curb." Choosing any of these options will expand the excavation entity accordingly.









#### **Street Excavation Tool**

The Street Excavation tool allows users to create excavation entities based on roads and highways. You can create as many Street entities as needed.

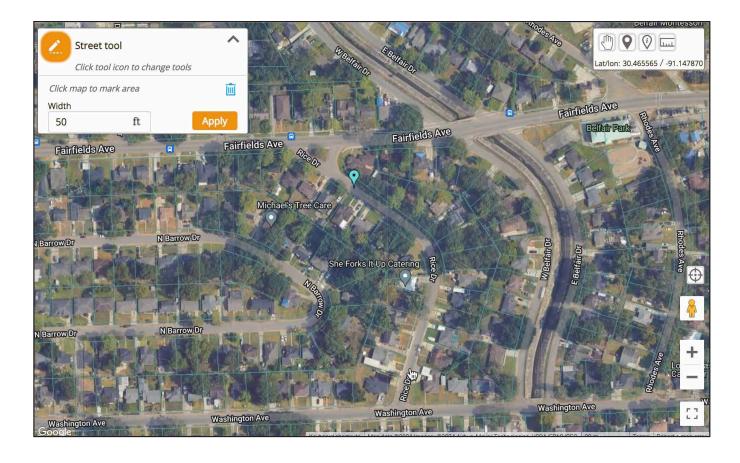
First, access the Drawing Tools menu and choose the Street Excavation tool.

Next, enter the width (in feet) needed to contain your work site.

Click on the centerline of the road at the starting point of your excavation and then click on the centerline of the road at the ending point of your work\*. Clicking the ending point will convert the selected features to an excavation entity with the width you had previously designated.

\* When using the Street Excavation tool all work must be limited to one street.

Street Excavation Tool 33





Street Excavation Tool 34

#### **Other Tool**

The **Other** tool is reserved for situations where no other excavation entity will properly cover the dig site. The Other tool allows you to "free-hand" draw an excavation entity.

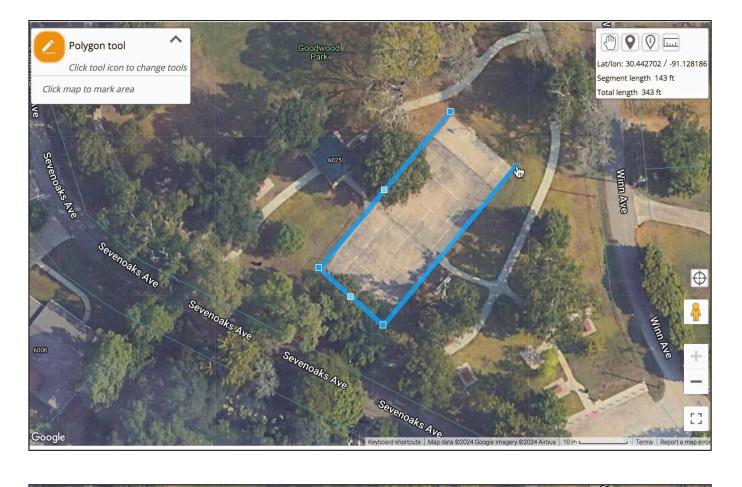
First, access the **Drawing Tools** menu and choose the **Other** tool. After reading and dismissing the pop-up message, begin by making a single click on the map where you would like to set your first point.

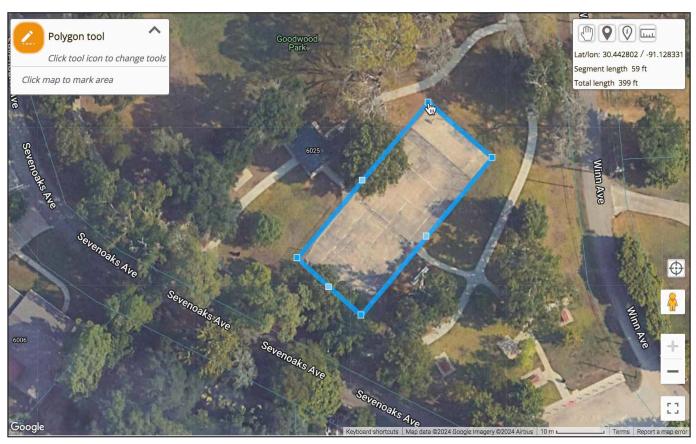
Continue setting points until you completely encompass the entire area of excavation. To close out the polygon, click on the same point where you began.

ITICnxt will automatically fill out most location information based on the polygon you have drawn. Carefully review the **Address, Street, Intersecting Street** and **Specific Location of Work** fields for accuracy. If changes are necessary you can edit any field by hand.

**PLEASE NOTE:** In the event of any ambiguity, discrepancy, or confusion between a written description and an illustration, the written description provided by the excavator or demolisher shall be considered the location of work.

Other Excavation Tool 35





Other Excavation Tool 36





Other Excavation Tool 37

# **Locator Tickets**

The **Locator Tickets** portal contains a complete list of all locator tickets received for the district code(s) associated with your account. You can sort them in a number of ways.

The **Released Between** menus will narrow the ticket list based on when the tickets were released.

The **Districts** menu allows you to display only those tickets associated with a specific utility district.

The **Filter by** menu allows you to narrow the ticket list based on **Marking Status**.

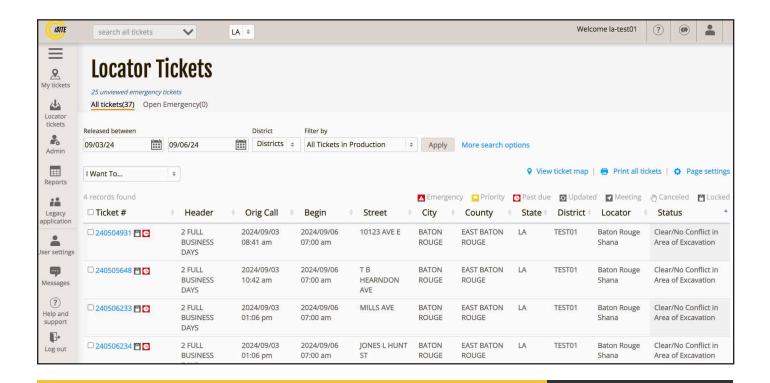
Once you've made your menu choices, hit the Apply button to display the new ticket list.

Click More search options for more precise search options.

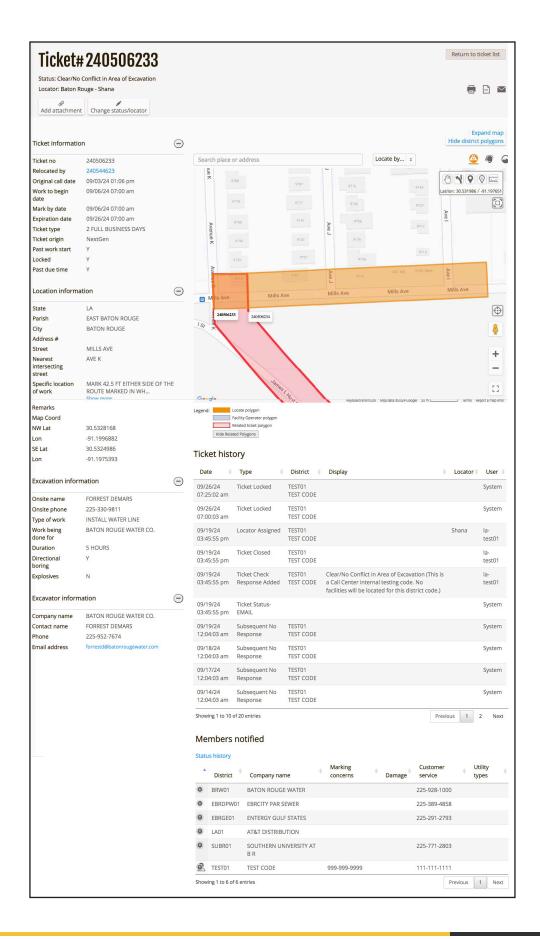
Clicking View ticket map will display the currently selected tickets on the map. This feature can be useful for planning out multiple locating jobs in one trip.

The Uwant To... allows you to Change status/locator, Email or Print multiple tickets simultaneously.

Click a **Ticket Number** to view an individual ticket. Viewing an individual Locator Ticket allows you to **Add File Attachments** or access the **Change Status/Locator** menu.



Locator Tickets 38



Locator Tickets 39

### **Change Status/Locator Menu**

The change status/locator menu is your primary avenue for implementing actions to locator tickets. From this menu you may assign a ticket status, assign a locator to respond to the ticket, and add internal/external notes to the ticket.

### **District Code**

Displays the utility current district code you are working with.

### Status Drop-Down Menu

Use this menu to assign a marking status to the ticket.

### **Status Comments**

You may enter status comments in this field. Status comments will be made available to the excavator when the ticket's marking status is updated.

#### Add Internal Notes

You may use this field to add internal (private) notes to the ticket.

### **Update Assigned Locator**

Use the drop-down menu to select a locator to respond to the ticket. (See page 43 for information on creating locator IDs for your account.)

### **Update Internal Status**

Use this drop-down menu to **Close** or **Open** the ticket.

### **Add Custom Responses**

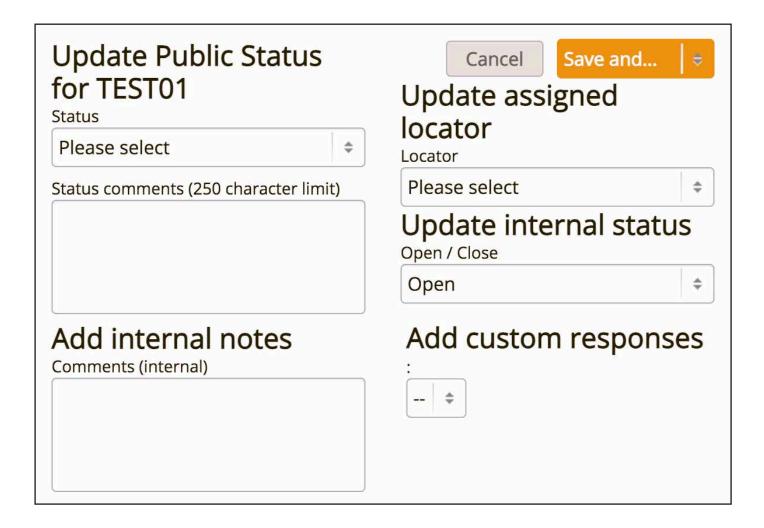
This area is reserved for any custom responses you have created for your account. (See page 51 for more info.)

### Save and...

Use this menu to implement the changes you have made to the locator ticket.

- Save and Return will save changes and return you to the ticket list.
- Save and Stay on Page will save changes and remain on the current ticket.
- Save and Go to Next Ticket will save changes and display the next ticket on your ticket list.

**ALERT!: Save your work!** If you do not choose an option from the "Save and..." menu, any changes you make to the current ticket will be lost.



### **Admin Menu**

The Admin Menu allows you to make account adjustments that pertain to the Locator Tickets section of ITICnxt.

### iSite Users Menu

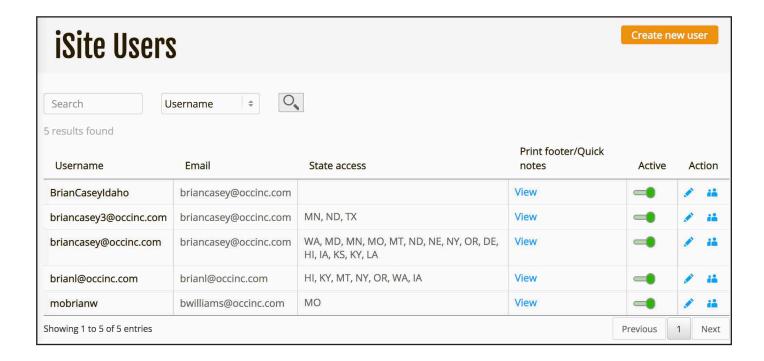
The iSite Users menu allows an administrator to create and manage additional iSite Login IDs for other users. Click the Create new user button to create a new user account.

The **Search** function allows you to search by username or email address.

The **Active** column allows you to activate or deactivate a user.

The **Edit** button ( ) allows you to edit the corresponding user account.

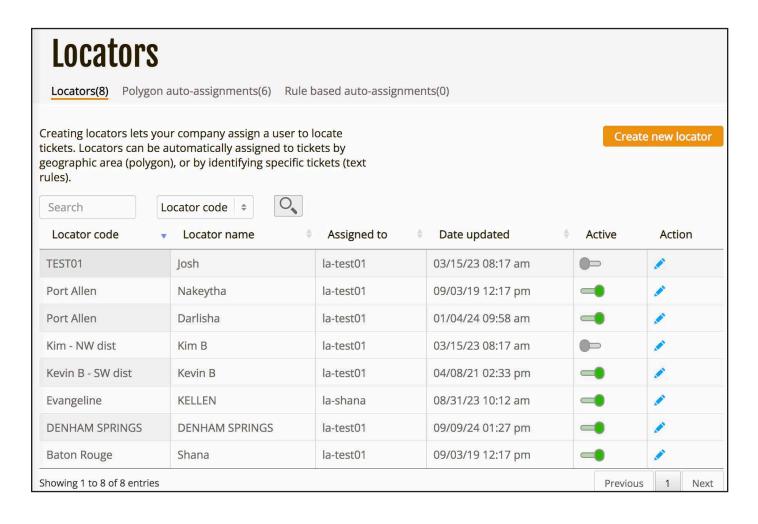
The **Clone** button ( in allows you to make a "clone" of the corresponding user account, helping you save time when setting up multiple user accounts.



Admin Menu 42

### **Locators Menu**

The Locators Menu allows you to set up locators to assign incoming tickets to. It also allows the creation of **Auto-Assignments**, which will automatically assign locator tickets to specific locators based on pre-set criteria.



Locators Menu 43

### **Polygon Auto-Assignments**

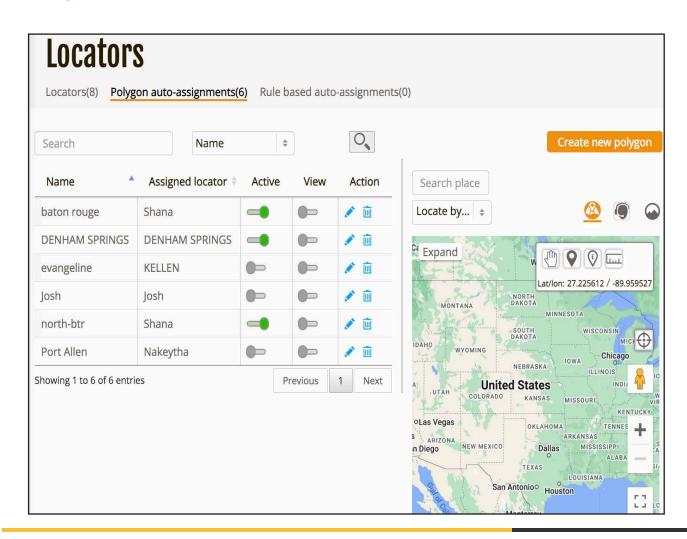
Polygon Auto-Assignments give administrators the ability to automatically assign locate tickets to locators based on the physical location of the work area.

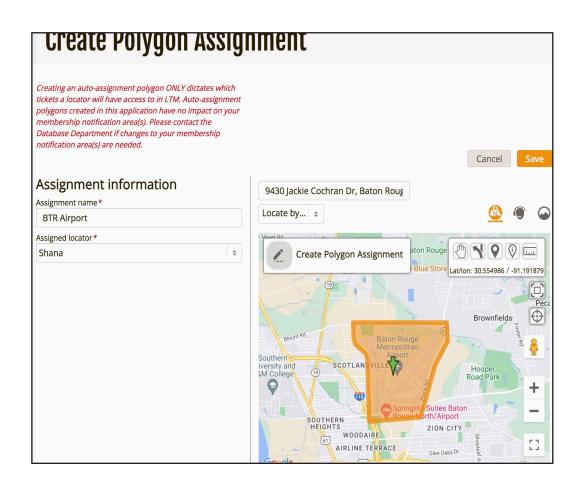
To create a new polygon auto-assignment click the Create new polygon button.

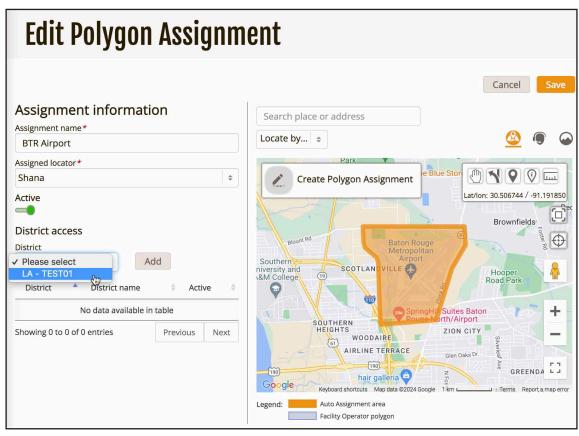
Enter a name for the new polygon in the **Assignment Name** field, and select an existing Locator using the **Assigned Locator** drop-down menu.

Find and map out the auto-assignment area using the map interface. Drawing the auto-assignment polygon works the same as the "Other" draw tool in ITIC (See page 35 for more info). Click the **Save** button to save your changes and move on to the **Edit Polygon Assignment** menu.

Next, assign a locating district to the auto-assignment using the **District Access** menu. Then click **Save** again. That's it! You can return to this menu at any time by clicking the corresponding **Edit** button ( ) on the **Polygon Auto-Assignments** menu.







### **Rule Based Auto-Assignments**

Rule Based Auto-Assignments give administrators the ability to automatically assign locate tickets to locators based on information contained in the ticket(s).

To create a new rule-based auto-assignment click the Create new rule button.

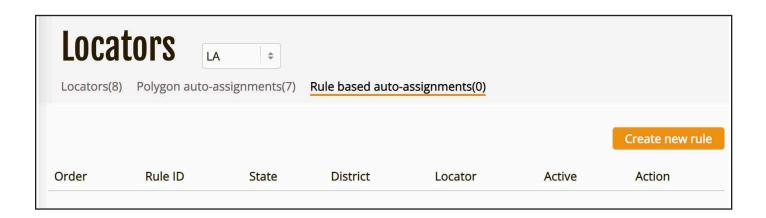
Priority determines the auto-assignments order of operation (if more than one auto-assignment is applicable to a given ticket).

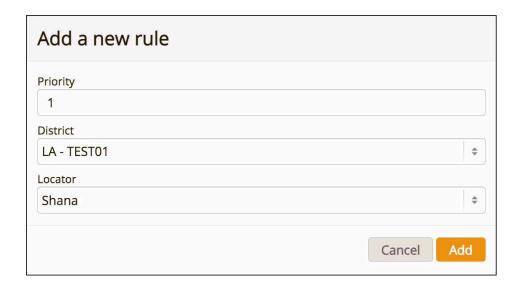
District determines which district will apply to the new rule.

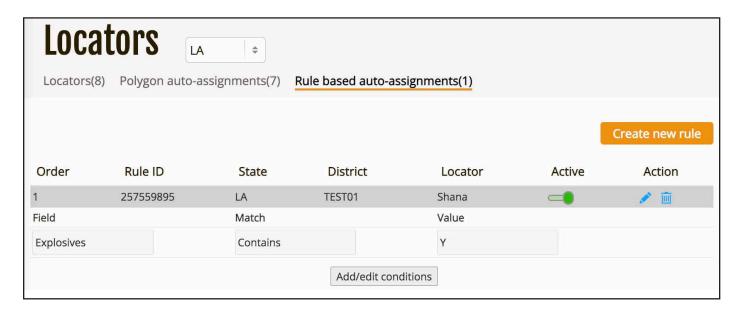
Locator determines which locator will receive the auto-assigned ticket.

Click **Save** when you are ready.

You will be returned to the Rule Based Auto-Assignments menu. You can click Add/edit conditions to add one or more criteria which will trigger the auto-assignment rules. Click **Save** to save your changes.







### **Locator Ticket Alerts**

Locator Ticket Alerts is an optional system that will automatically notify you via SMS (text message), or email when certain types of Locator Tickets are received.

To create a new **Alert** click the Create new alert button. This will take you to the **Add Ticket Alert** menu.

### **District**

Use the drop-down menu to select the relevant district code.

### **Alert Name**

Choose a name for the new Alert.

You may choose to be alerted via Email, SMS (text) message, or both. If choosing SMS, be sure to select your Mobile Service Provider from the drop-down menu.

#### Start Time and End Time\*

### Day(s) of Week:

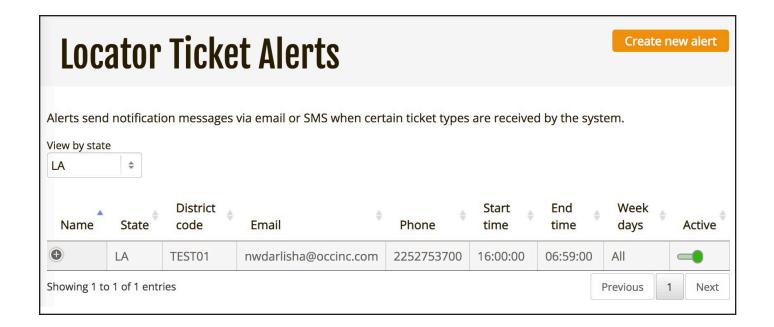
Use the check boxes to specify what day(s) of the week you would like to receive alerts.

### **Headers**

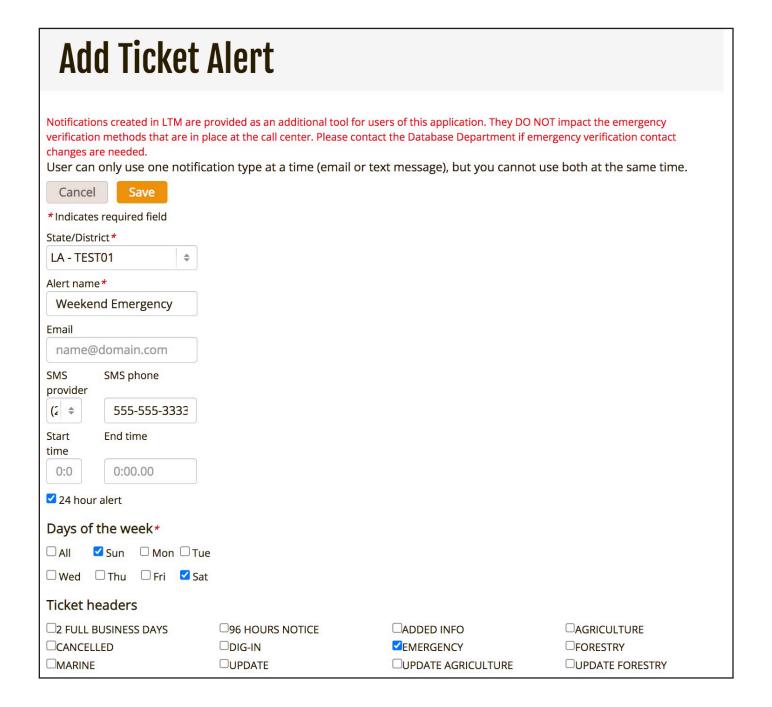
Use the check boxes to specify the type of ticket(s) that will trigger an alert.

When you are ready, click Save . Your new Alert will now appear on the **Locator Ticket Alerts** menu.

Locator Ticket Alerts 48



Locator Ticket Alerts 49



**NOTE:** The timeframe for each Ticket Alert cannot cross the midnight (24:00:00) mark. For example, if you wanted to receive a notification anytime an emergency is submitted between the hours of 5pm and 8am, Mon-Fri, you will need to set up two notifications, one for 5pm-11:59:59pm Mon-Fri and another for 12am-7:59:59am Mon-Fri, as shown in this example:

Weekday Emergency A	LA	TEST01	5555551111	17:00:00	23:59:59	Mon, Tue, Wed, Thu, Fri	
Weekday Emergency B	LA	TEST01	5555551111	00:00:00	07:59:59	Mon, Tue, Wed, Thu, Fri	

Locator Ticket Alerts 50

### **Custom Responses**

The Custom Responses menu allows you to create additional questions or other data entry fields on your received Locator Tickets. To create a new **Custom Response** click the Create new response set button.

Select the relevant notification district from the drop-down menu.

The **Order** number will determine what order custom responses will appear on the ticket (if there are more than one).

Enter the text of the question in the **Question Text** field.

Choose the type of answer available to the new question. You may choose from **Yes/No**, an open **Number** field, or an open **Text** field.

You can make the new question a required question by ticking the **Required** check box.

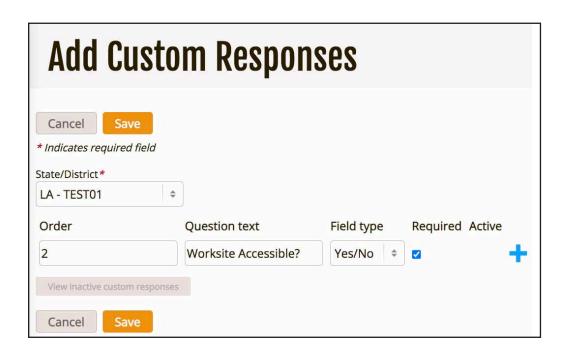
You can choose to de-activate (or activate) the Custom Response using the slider in the **Active** column.

You may add additional Custom Response questions by clicking the button.

Click the Save button to save your changes.

Custom Responses 51

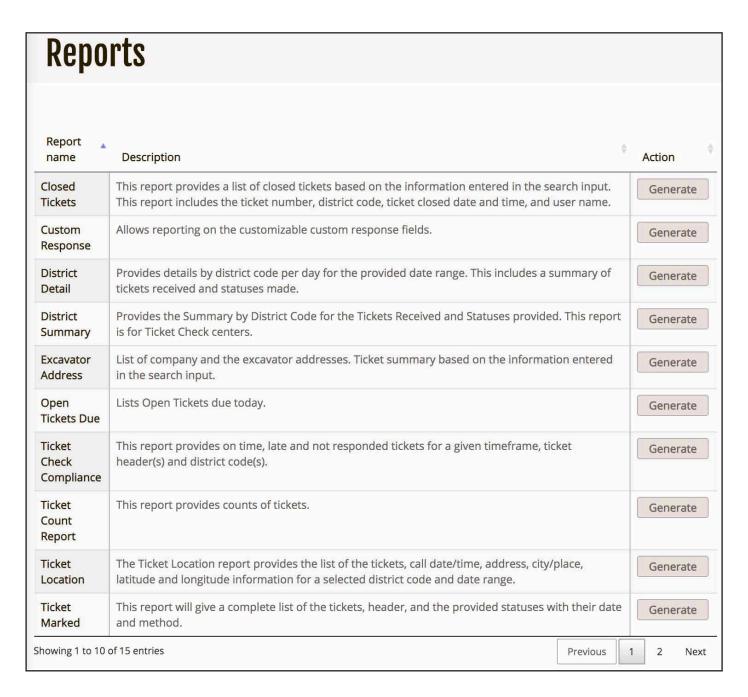




Custom Responses 52

# Reports

The **Reports** section provides options for running reports on several different aspects of ITICnxt. The types of available Reports will vary depending on your level of customer access, and can be exported in a variety of file formats (.pdf, .xml, etc.). Reports may be accessed via the ITICnxt menu bar on the left side of the page.



Reports 53

## **Quick Notes Menu**

The **Quick Notes** feature allows you to create quick note buttons, which in turn allow you to enter commonly used notes in the Notes section of a ticket with a single click.

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

### Order

The Order field will determine what order the quick notes button(s) appear on the ticket interface.

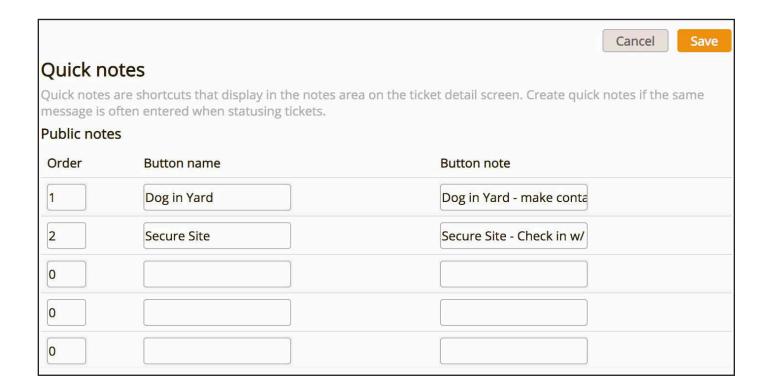
#### **Button Name**

The Button Name field will determine the name of the button as it appears on the ticket interface.

### **Button Notes**

The Button Notes field will determine what information is added in the **Notes** section of the ticket when the quick note button is clicked.

When you are ready, click **Save** to save your changes.



Quick Notes Menu 54



