



A complete how-to guide for Member Facility Operators

Service Area Mapping



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About this Guide

Exactix is UDig NY, Inc's One-Call Platform program for Excavators, Member Facility Operators, and UDig NY. The program is where location requests are submitted by web users or by UDig NY when a location request is called in, Member Facility Operators can view and respond to tickets, update their service area registration map, and Member Facility Operators & Excavators can monitor the status of their location requests.

The purpose of this guide is to outline how a members' mapping contact(s) should utilize the UDig NY's Exactix platform to create and maintain their associated Service Area(s) registration maps which ensure proper notification of location requests where the Members' Service Area(s) have underground infrastructure.



How to use and Navigate Your Dashboard

Getting Started

Once you have an Exactix account and log in, you will see your dashboard. The dashboard is your **home screen** for your Exactix account.

Let us review what the dashboard allows you to do.

When you first log into your Exactix account, you will land on your **home screen**. This screen will have information, news, and/or alerts that UDig NY may need you to be aware of.

- 🙆 UDIG I	DANNY DIGGER () 2 S. 17
© Home	Home
Tickets	Welcome to Exactix!
Service Areas	Go to Troket Dashboard
	Announcements
	PLEASE BE ADVISED THIS IS NOT A LIVE SYSTEM. ALL TICKETS ENTERED ON THIS SITE ARE FOR TRAINING OR TESTING PURPOSES ONLY.
	Please note this site is not compatible with Internet Explorer.

Dashboard icons and what they do

Let's take a look at some other features that are available on your dashboard.

In the top left-hand corner, you will see three parallel lines. This is your menu icon and can be used to expand or collapse your main menu to show just icons, or the icons with text. You can also simply hover over the menu to have a quick view of your options. Taking your cursor off the bar will result in the menu collapsing to just show you the icons. Click on the three lines to keep the menu expanded.

In the top right-hand corner, you will see your name with four icons next to it. These icons represent different options on how you can view your dashboard. Hovering your mouse over each icon will explain what each mean.

	Switch to ~				
- 6	Service Areas	DANNY DIGO	GER 😂 🔺	<u> Ә.</u> न	
☐ Service Areas					
	• Filter by Name or Code	clear filters			C
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	<u>Name</u> ↑	Code	<u>Open 24x7</u>	Active	Ţ
	EXAMPLE UDIG NY	EXAMPLE UDIG NY	No	No	Ful



The first icon allows you to toggle to a full screen view.



The third icon allows you to change the theme color of the dashboard. UDig NY has preset a default theme to match its brand colors. There are several other options for you to choose from, should you wish.



The second icon gives you options to manage your profile within the system and log out of your account. These are called User Actions.



Finally, the fourth icon allows you to change the size of the text within your dashboard.

Service Area List

On the left menu bar, find and click on the **Service Areas tab** to open the list of your associated Service Area(s). The **Service Area List** view will list all Service Area(s) in which the web user is associated.

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습 Home	Service Areas					ist 🗖
☐ Service Areas						
	م Filter by Name or Code	<u>clear filters</u>			« Previous	1 Next »
	View: System Default 🗸	Filter: All 🗸 0 Selected	₿ C			
	<u>Name</u> ↑	Code	<u>Open 24x7</u>	Active	<u>Type</u>	Last Mod
	EXAMPLE UDIG NY	EXAMPLE UDIG NY	No	No	Full	04/21/202

View a Service Area(s)

To view a **Service Area**, double click on the **Service Area item line**.

VIE	ew: System Default 🗸	Filter: All V 0 Selected	G G			Results:
	<u>Name</u> ↑	Code	Open 24x7	Active	<u>Type</u>	Last Modified
	EXAMPLE UDIG NY	EXAMPLE UDIG NY	No	No	Full	04/21/2023 11:08 AM

This will open to the Service Area Profile.

- 🔕 UDIG	•NY Switch t	0 ~				DANNY DIGGER :	: <u>२</u> त
Home	EXAMPLE U (EXAMPLE UDIG NY)	DIG NY				List	Dashboard
	< Basic	Audits Hours and Holidays	Contacts	Attributes	Delivery Rules	Service Providers	Ticket Assig ゝ
	General Info	General Info				L Dov	wnload Profile
	Positive Respor	nse Code: EXAMPLE	UDIG NY			<u>×</u>	Report
	Phones	Name: EXAMPLE	UDIG NY				
	Emails	(Text-to-S	peech Name)				
	Litility Types	Member: Code: EXAM	PLE UDIG NY				
	ouncy types	Not Activ	e				
		Type: Full	-				
		(Marking	Color)				
		Positive Response					
		Positive Response Code: 15903	/				
		(Auto Res	sponse)				
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		Phones					
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How to Use and Navigate Your Dashboard

Service Area	a Profile							
Service Areas	(EXAMPLE UDIG N	NY)						
	< Basic	Audits	Hours and Holidays	Contacts	Attributes	Delivery Rules	Service Providers	Ticket Assig ゝ
	General Info	(General Info					ownload Profile
ᢙ Home□ Service Areas	EXAMPLE UI (EXAMPLE UDIG NY)		Hours and Holidays	Contacts	Attributes	Delivery Rules	List	Dashboard
	< Basic General Info Positive Respon Phones Emails Utility Types	Audits Ger se Pos Por Pot	Hours and Holidays heral Info Code: EXAMPLE U Name: EXAMPLE U (Text-to-Spi Member: EXAMPLE U Code: EXAMPLE U Code: EXAMPLE U Type: Full (Web URL) (Marking C) itive Response Code: 159037 Response Type: Utility Type (Auto Response) alls	Contacts DIG NY DIG NY eech Name) DIG NY EUDIG NY oloor)	Attributes	Delivery Rules	Service Providers	Ticket Assig >
		Util CA FII	ity Types TV BER					

The Service Area Profile is where the detailed information for the membership is located.

Detailed information includes:

- Utility Types
- Office Hours and Holidays
- Contacts
- How to deliver location request notifications
- Registration Map

Detailed Service Area information can be found under one of the nine tabs that run across the top of the Profile view.

There are nine tabs:

- Basic
- Audits
- Hours & Holidays

- Contacts
- Attributes
- _ .. _ .
- Delivery Rules

- Service Providers
- Ticket Assignments
- Registrations

Explanations of Profile Tabs

Let's go over what each Section Tab is and the information that can be found in each tab.



Basic tab

The general information is listed along with Positive Response setup and the Utility Types listed for the Service Area. Please note we do not log phone and email information on this section.

Here you can also find the Download Profile Report button. This button will download a .pdf file to your computer and is a copy of the Service Area Profile information.

	Basic	Audits	Hours and Holid	ays Contacts	Attributes	Delivery Rule	s Service Pi
G	eneral Info	Ge	eneral Info			1 0	lownload Profile
Pi Ri Pi Ei	ositive esponse hones mails tillty Types		Code: EXAN Name: EXAN (Text EXAN Net Post Code: Not / Type: Full (Web (Mar	IPLE UDIG NY IPLE UDIG NY ITO-Speech Name) IPLE UDIG NY IPLE UDIG NY IPLE UDIG NY INCLUE INCL		14	Report
		Po	sitive Response	9037	-		
			Response Type: Utilit (Auto	y Type) Response)			
		Ph	ones				
		En	nails		~		
		Ut	ility Types				

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EXAMPLE U (EXAMPLE UDIG NY)	DIG NY	(î	Il List	Dashboard
Basic	Audits	Hours and Holidays	Contacts	Attributes	Delivery Rules	Service Pi
clear filters				1.40	Previous 1 Next +	thems per Page 25
Date	Descripti	00	Values			Results: 2
04/24/2023 11:08 AM	Contact A	dded to Service Area	Contact Typ Person: 'DA Service Area	e: 'Mapping', NNY DIGGER', a: 'EXAMPLE UDIG F	4 Y *	Added
04/24/2023 09:47 AM	Contact R	emoved from Service Area	Contact Typ Person: 'DA Service Area	e: 'Mapping', NNY DIGGER', a: 'EXAMPLE UDIG f	Ω°.	Removed
04/21/2023 11:59 AM	Contact A	dded to Service Area	Contact Typ Person: 'DA Service Area	e: 'Mapping', NNY DIGGER', i: 'EXAMPLE UDIG I	۹Y.	Added
04/21/2023 11:08 AM	Registrati	on version 2 Added	Created By Is Parent Re Version: '2'	Person: 'KRISTIN V gistration: 'No',	INDEUSEN',	Added
04/21/2023 11:08 AM	Member B	EXAMPLE UDIG NY Modified	Code: 'TEST	·→ 'EXAMPLE UDIG	NY	Modified

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EXAMPLE UDIG (EXAMPLE UDIG NV)	i NY		<->	List	Dashboard
< Basic Auc	lits Hours and Holidays	Contacts	Attributes	Delivery Rules	Service Pi
Business Hours Holidays System Holidays	Business Hours 8:00 AM - S:00 PM M, T, Th, I Holidays System Holidays Met Ocurrence (55/21/2023) Previous Docurrence (55/21/2023) Previous Docurrence (55/21/2023) Previous Docurrence (55/21/2023) Previous Occurrence (57/54/2023) Pr	F			

Audits tab

This is a running log of changes made to the Service Area. The system will note an audit when an item is modified, added, or removed. Member Support will also make an internal note describing the changes.

Hours and Holidays tab

Here you will find your hours of operation along with any system and non-system holidays. These hours and holidays listed may affect your ticket delivery rules.

Explanations of Profile Tabs

Basic	Audits	Hours and Holidays	Contacts	Attributes	Delivery Rules	Service Providers	Ticket Assignment	Registrations
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Contacts tab

Here is a list of all the Contacts [*Type and Role(s*)] associated with the Service Area.

EX/	AMPLE I IPLE UDIG N	JDIG NY	6		Ĵ	🗎 List	Dashboard
<	Basic	Audits	Hours and Holidays	Contacts	Attributes	Delivery Rules	Service Pi
Cor	ntacts	Co	intacts				
		÷c	MANNY DIGGER Mapping Login: krisphelps38pyahoo.com, kn Role(s): MEMBER - MAPPING	sphelps3dlyahon.cor	2000		
		J	OHN DOE Voite Calis Login: Google: gegenrockonfligma geigerrockonfligmati.com, geigerrockonfligmati.com	it zom, Geoglet sckontitymait.com,			

Attributes tab

UDig NY currently does not utilize this tab for our members.

	Basic	Audits	Hours and Holidays	Contacts	Attributes
Att	ributes	At	tributes		
			DRS Company:		
			Neartime Damage Stats:		
			NYGAS Reporter:		

Delivery Rules tab

This is where each of your delivery setups will be listed. A delivery is a notification which can be delivered by email, web request, voice call, or text message. The rule will also specify ticket types and time frame of delivery. This also reviews the business hours.

Basic	Audits	Hours and Holidays	Contacts	Attributes	Delivery Rules
Business Ho	urs	Business Hours			
Ticket Delive Rules	ery	8:00 AM - 5:00 PM M, T, Th	, F		
End OF Day Audit		Ticket Delivery Rules			
Rules		Not Active Send Tickets to Destinatio Address. 1	 EXAMPLE DESTIN Code: EXAMPLE DI Not Active Sending message risphelps3@yahoo. 	ATION ESTINATION Is is disabled com	
		During Times Always			
		For Ticket Meet, Emerg Categories Design, Den	ency, Short Notice olition	, Regular,	
		End of Day Audit Rules			

Service Providers tab

If you use a locating or ticket management system to receive location requests, they would be identified here.

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Explanations of Profile Tabs

Basic	Audits	Hours and Holidays	Contacts	Attributes	Delivery Rules	Service Providers	Ticket Assignment	Registrations
-------	--------	--------------------	----------	------------	----------------	-------------------	-------------------	---------------

Ticket Management tab

This section is for internal use for UDig NY.

All Members' Service Areas are required to receive all ticket types.

Contacts	Attributes	Delivery Rules	Service Providers	Ticket Assignment		
Assignment	As	signment Option	IS			
Options	Not	ify on place lookups.				
Ticket Types	Not valu	Notify regardless of "within 25ft of the edge of the street" value.				
	Tio	ket Types				
	Ass	ion service area to AL	L ticket types.			

Registrations tab

Here is where the Service Area Registration map and previous versions will be listed. A registration map is a map identifying where the Service Area has underground facilities that they own and maintain. This map is used to identify when a Member Facility Operator will be notified of an Excavation taking place.

Contacts	Attributes	Delive	ry Rules	Service Providers	Ticket Assignr	ment Registrations
Registrations	Regi	stration	5		inded	
	Ver	sion 2 ated	Not Complete 04/21/20: 11:08 AM KRISTIN VANDEUS	23 by View Mad EN	Complete	
	Ver Cre	sion 1 ated	Active 04/18/20 01:59 PM KRISTIN VANDEUS	23 by EN		
	Cor	npleted	04/18/20 02:00 PM KRISTIN VANDEUS	23 by <u>these Man</u> EN		
	App	proved	04/18/20 02:00 PM KRISTIN VANDEUS	23 by EN		



How to Utilize the Member—Mapping Role

Getting Started

Within this section of the guide, we will discuss the Member—Mapping roles permissions within the Service Area Profile, how to view a map and the mapping tools, and the different options for adding a new registration version to a Service Area.

Remember the Member—Mapping role is intended for specific contacts within the Service Area such as Mapping and Service Area Manager contacts. This role gives the web user permission to view their associated Service Area(s), view the Service Area registration map, make updates to the service area registration map, and participate in Map Change Detection.

Use and Navigate the Registration Tab

Depending on whether the Service Area is new and needs a registration map or if it's an existing Service Area with a registration map listed, there will be different functions available.

New Service Area with no registrations listed:

You will only see the Registration Line with an **Add button** located on the right side of the line.

Registrations <u>Registrations</u>	Basic Audi	
	Registrations	add

Existing Service Area with a registration listed:

You will have the **Add button** located on the right side of the Registration line and a **View map button** to the right of the Registration Versions listed under the Registration Line.

Basic	Audits	Hours and Holida	ys Contacts	Attributes	Delivery Rules	Service Providers	Ticket Assignment	Registrations
Registrati	ons	Registrations					add	
		Version 2 Created	Not Complete 04/21/2023 11:08 AN VANDEUSEN	1 by KRISTIN	Vie	ew Map	Complete	
		Version 1 Created	Active 04/18/2023 01:59 PN VANDEUSEN	1 by KRISTIN				
		Completed Approved	04/18/2023 02:00 PN VANDEUSEN 04/18/2023 02:00 PN VANDEUSEN	1 by KRISTIN 1 by KRISTIN	<u>×</u>	iew Map		

Please note:

A Service Area is allowed **One (1) active** registration version. This means if the Service Area has multiple underground utilities listed, then the active registration version needs to include all areas that the Service Area owns and/or maintains underground facilities.

Example:

The Service Area is listed as having water and sewer. The registration map will need to include all the areas where there are water and sewer utilities the Service Area is responsible for marking out.

Add (Registration version)

The **Add button** allows you to add a new registration version to the service area. The add registration window gives you four (4) options on how to create a new registration.

- Start with Registration Map from Version
- Start with an Empty Registration Map
- Copy Registration Map from another Service Area
- Import from ESRI Shape File Layer

Let's go over what each new registration option is and how it is used.

	Z Basic Audits Hours and Holidays Contacts Attributes Delivery Rules Service Provide	c
rs	Registration	
	Choose how to create the new Registration:	
rea	O Start with Registration Map from Version:	
rovi	Start with an empty Registration Map:	
me	Copy Registration Map from another Service Area:	
/II3	O Import from ESRI Shape File layer:	
	Cancel E Save	1
atio		2

Explanations of each option for Adding new versions

There are four (4) options to choose from when creating a new **Registration (version)**. Each option is intended for specific scenarios. Let's go over each option.

Start with Registration Map from Version

This option is the most common option for members who are looking to update their existing service area. When using this option, another field is presented on the Add Registration Window; **Select starting Registration Version** this field is defaulted to select the Active registration version. This means the new version you are looking to create will copy the **Active registration version** and you can then make the necessary changes without affecting the active registration map, until you are ready to activate the new version.

Cavalors				
mbers	Registration			
rvice Areas	Choose how to create the new Registration:	Select starting Registration Version: This Registration Map will be copied to the new Registration so that changes can be made to it.		
rvice Provide	Start with Registration Map from Version:	Registration		
estinations	Start with an empty Registration Map:	Version: 1 (Active), Created: 04/05/2024 01:43 PM by KRISTIN VANDEUSEN	Ť	
	O Copy Registration Map from another Service Area:			
ople	O Import from ESRI Shape File layer:			
ministration				
les			Save	

Start with an empty Registration Map

This option is used mostly by new members who are creating their first registration map and are going to be manually drawing the Service Area covered areas this is an empty map of New York. The Mapping Contact will need to search for a specific area and then begin to map the areas needed.



Explanations of each option for Adding new versions

Copy Registration Map from another Service Area

The Copy Registration Map from another Service Area is used by UDig NY. This option allows UDig NY to copy another Service Area registration map into another service area.

Example of use:

A Municipality adds a new Service Area for another department to manage their own location requests.

Member support would copy the existing Service Area registration map into the new Service Area. The mapping contact for the new Service Area would be able to then make changes to the copied version instead of creating a map from an empty view.

Once you select an option and click save a new registration version will be added under the registration tab. This new version is not active until it is reviewed and completed by the Mapping contact which will then notify Member Support at UDig NY to review, approve, and activate. We will discuss this process in more detail later.

/ators			
pers	Registration		
ce Areas	Choose how to create the new Registration:	Select Service Area and starting Registration Version:	
ce Provide	O Start with Registration Map from Version:	Find Service Area	
nations	O Start with an empty Registration Map:	Registration	
	Copy Registration Map from another Service Area:	*	
e	O Import from ESRI Shape File layer:		
nistration			
			Save

Import from ESRI Shape File Layer

This option is used by Members who have GIS information or company to map their Service Area in a file system that can then be imported into the Exactix platform. This option has requirements that need to be met.

Registration	
Choose how to create the new Registration: Start with Registration Map from Version: Start with an empty Registration Map: Copy Registration Map from another Service Area: Import from ESRI Shape File layer:	Select ESRI Shape Files to Upload: Select for drag-and-drop the ESRI Shape Files with extensions .shp, prj, dbf, shx (optional). The .dbf file is only required if including Map Attributes. Select Files * The files you upload must contain your entire coverage area. If uploading lines or points, enter the buffer (in feet; minimum of 200ft) to be applied to the shapes: buffer (ft) * Optionally, each line or point feature may contain an attribute named "BufferFt" which contains the buffer to apply for each individual feature. buffer (ft)
	Sarcel Sar

my.UDigNY.org :: Access. Information. Support.

View Map

The **View Map button** opens the registration version map for you to review the map details.

Basic	Audits	Hours and Holidays	Contacts	Attributes	Delivery Rules	Service Providers	Ticket Assignment	Registrations	5
Registratior	IS	RegistrationsVersion 7AcCreated07	tive /28/2020 02:20 PM	by MICHAEL RU	EDE, based on Version	6			View Map
		Completed 07 Approved 07 Area 49	/28/2020 02:21 PM /28/2020 02:49 PM .23 Total sq miles, /	by MICHAEL RU by KRISTIN VAN Added 14.56 sq m	EDE DEUSEN iles (41.54%), Remove	d 0.39 sq miles (1.11%)			Find Affected Tickets

o ^o Excavators					
	Registrations	Registrations	Action		HQU
塔 Members		Created Completed	Active 07/28/2020 02:20 PM by MICHAEL RUEDE, based on Version 6 07/28/2020 02:21 PM by MICHAEL RUEDE	Cierce Mant	
Service Areas		Approved Area	07/28/2020 02:49 PM by KRISTIN VANDEUSEN 49:23 Total sq miles, Added 14:56 sq miles (41:54%), Removed 0:38 sq miles (1:11%)	nd Tickette	
°T ⁴ Service Providers		Version 6 Created	Approved for use 077242020 10 44 AM by MICHAEL RUEDE, based on Version 4 072620200 70 54 AM by MICHAEL RUEDE.	Conv. Matt	Activate
d Destinations		Approved Area	07/28/2020 06 27 Md by KIGHEL KVEDE 07/28/2020 06 27 Md by KIGHELSEN 35.06 Total sq miles, Added 4.13 sq miles (3.31%), Removed 93.85 sq miles (75.21%)	al Tickete D	mbaaxayn
음 People	-	Version 5 Created Area	Not Complete 07/24/2020 10 28 AM by MICHAEL RUEDE, based on Version 4	View Map	Complete
Administration		Version 4 Greated	Approved for use 01/27/2020 07:06 PM based on Version 3	View Mate	écliste
⊕ Roles		Completed Approved	01/27/2020 07:06 PM 01/27/2020 07:06 PM 224 78 Total co miles 4dded 0.04 so miles (0.04%)	e tistets 0	- Second
Communications		Version 3	Approved for use		0.0mm
🗠 Reports		Created Completed Approved	08/06/2019 03:17 PM by TON SCHMIDT, based on Version 2 08/06/2019 03:17 PM by TON SCHMIDT 08/06/2019 03:17 PM by TONI SCHMIDT 29/2 70 3-bits common	view Mass ed Tickatu Ma	n-Anterne
💥 System		Version 2	Approved for use		D.Decem
Alerts		Completed Approved	08/06/2019 02.32 PM by TONI SCHMIDT 08/06/2019 03.16 PM by TONI SCHMIDT 08/06/2019 03.16 PM by TONI SCHMIDT	ed Tickata Ma	n Approve

Let's discuss the registration details located around the map.

Registration Version Details

When selecting **View Map** on an existing registration map or your newly created version, a map will open. If it is a new empty registration the map will be zoomed out and of New York State or if it is an existing registration, it will be zoomed to the service area polygons – if you have facilities that cover the state of New York, then the map will be zoomed out to show all areas.

The **View Map** view has some information details that can be located on the outer left margin of the map. Here you will find the following information:

Status of the registration map

- 1. Not Complete: Open and can make changes to the map.
- 2. Complete Awaiting Approval: Changes have been made and the mapping contact has reviewed the map and sent for approval.
- **3. Approved For Use:** Member Support has approved the changes.
- **4. Active:** Member Support has activated the map and it is the active registration version.

Created: Date, time, and person who initiated the Registration version.

Completed: Date, time, and mapping contact who completed the registration version changes.

Approved: Date, time, and UDig NY contact who approved the registration version [this will only appear once it has been approved].

Changes: Identifies each change that was made to the registration version map—you can view the change by selecting the radio button.

There is also an **Export to Shapefile** button located on the top right outer corner of the map. If you have a GIS system or company that does your mapping, this button will be used to export your current registration version map into Shapefiles to then make the changes in a GIS software before importing new files.

EXAMPLE UDIG NY (EXAMPLE UDIG NY) Status: Not Complete Created: 05/01/2023 12:00 PM 05/01/2023 12:00 PM Image: Ima





How to Utilize the Mapping Tools

Explanation of Mapping Tools

Located along the outer edges of the map there are the following mapping tools:

- Map View Tools
- Map Drawing Tools
- Other Mapping Tools

Let's review the various tools the map includes to assist you in navigation and enhancing your functionality.

Map View Tools :: Search Tool

The magnifying glass in the top left corner is your **Search** tool. You can use the **Search** tool to look for streets, places, points of interest, and latitude/longitude coordinates statewide or within your current map view.

To utilize the **Search** tool, click on the magnifying glass. You will notice that the icon will turn green and you will see a dropdown arrow in the left-hand corner of the search field. To view your options, click on the arrow.

To search for a street, place, or point of interest, begin typing in the search field. A list of possible matches will appear based on your search. Select the match by clicking on the option. You will notice your map will change to





Map View Tools :: Search Tool

highlight the street, place, or point of interest that you have select based on your search with a red outline.

If you are looking to find a location on your map using latitude/longitude coordinates, click the down arrow on the left-hand side of the search field and click on the **Lat/Lon Coordinate** option. This will change your search field to accept latitude and longitude coordinates.

Type in your latitude and longitude coordinates using a comma to separate them (the system will insert a space between the coordinates for you), and press the **enter/return** key on your keyboard. You will notice your map changes to pinpoint your desired coordinates, indicating the exact spot with a red marker.

Please note:

When clicking off the Search tool any searched areas will disappear.



— Lat/Lon Coordinate: юс.ккжж, -юс.ккжж	1
➤ 42.66102, -73.76979	
example: 43.1043, -76.0577 or 43.06.15.5, -76.03.27.7	0



Map View Tools :: Zoom In/Out

Located under the **Search** tool, you will find your **Zoom In/Out** tools. These buttons are a minus icon (-) for **Zoom Out** and a plus icon (+) for **Zoom In**. You can utilize these tools at any time during the mapping process to get a better view of the map.



Map View Tools :: Toggle Full Screen Tool

In the top right-hand corner of the map, you will see a diagonal line with an arrow on each end. This is your **Toggle to Full Screen** tool.

Clicking the **Toggle to Full Screen** tool will make the map take over your entire screen. If you toggle your map to a full screen, you will still have all your manual mapping tools available. To exit out of the full-screen mode, click the **'X'** in the right-hand corner, or the escape (ESC) key on your keyboard.



Map View Tools :: Toggle Full Screen Tool

The three lines icon located under your **Toggle to Full Screen** tool is called the **Toggle Base Map** tool.

The **Toggle Base Map** tool allows you to change your map to a satellite view at any time. Clicking on the tool again will revert your map back.



Map Drawing Tools :: Edit your Mapping Tools

The next set of tools we are going to discuss are the tools you can use to map or edit your mapping. These include:

- Edit Dig Site Tool
- Buffer Street or Map Feature Tool
- Draw Polygon Tool
- Draw Rectangle Tool
- Draw Circle Tool
- Draw Line Tool

To use these tools, you need to find a street, address, or point of interest on the map.



How to Utilize the Manual Mapping Tools

Map Drawing Tools :: Edit Dig Site Tool

The **Edit Dig Site** tool allows you to change/edit the polygon area that is already highlighted on your map. This tool is mostly used on the purposed excavation map when submitting a location request.



Map Drawing Tools :: Buffer Street or Map Feature Tool

The **Buffer Street or Map Feature** tool allows you to extend your mapped polygon to include nearby parcels or streets. This tool is used mostly when mapping the purposed dig area on a location request.

Clicking on the Buffer Street or Map Feature tool will turn the button green

Follow the prompt and **double click** on the area(s) or parcel(s) you want to add to your map. These areas will be highlighted in a blue gridded area(s).





Map Drawing Tools :: Draw Polygon Tool

The **Draw Polygon** tool can be used when the area you are trying to map is an irregular shape. Once you click on the **Draw Polygon** tool, you will see the button turn green.

Click one time on the area where you want to start drawing your dig site. Outline the area you want to map by **clicking once** at each point of the shape, where the direction changes. If at any point you make a mistake, you can click the Undo button to go back to your previous action.

When you have finished outlining the area, then **double click** on your last point to stop drawing. The new dig site will be highlighted in a blue gridded (hash marked) area. It's important to note that the Draw Polygon tool doesn't add an additional buffer to the polygon.





Map Drawing Tools :: Draw Rectangle Tool

The **Draw Rectangle** tool can be used to draw either a rectangular or square polygon. This tool is useful when the area you need to map extends more than 200 feet from the road (i.e., into a field).

Once you click on the **Draw Rectangle** tool, you will see the button turn green.

Using your mouse, **click once** on the first point on the map you would like your square or rectangle to begin.

Drag mouse out to the furtherest point of square/ rectangle. You will see the polygon start to form a square/rectangle. When the polygon is the size you wish, double-click off the polygon to unselect the polygon.





Map Drawing Tools :: Draw Circle Tool

The Draw Circle tool can be used to draw a circle with a 200-ft or larger radius.

To draw on the map, click the **Draw Circle** tool, which will turn green. **Click once** on the map where you would like the center of your circle to be. The circle defaults to a radius of 200-ft. You can make the circle larger by "dragging" the mouse out until the desired footage is reached.

Once you have your desired circle, **double click** to stop drawing. The new polygon will be highlighted in a blue gridded (hash marked) area.







Map Drawing Tools **::** Draw Line Tool

The **Draw Line** tool is used to draw a linear shaped polygon or to map out streets that have facilities located directly along or underneath them. This is the best tool to use when your facilities run between intersections below or along the roadway.

Once you click on the **Draw Line** tool, you will see the button turn green



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Using your mouse, **click once** on the first point on the map where you would like your line to begin. **Click once** at each point of your line, where the direction changes.

Double click at the last point to stop drawing. The polygon will be highlighted in a blue gridded (blue hash marked) area.

Other Mapping Tools :: Overview

The final set of manual mapping tools is located on the top center of your map. These tools are:

- Show Map Features Tool
- Show Map Information Tool
- Measure Distance Tool
- Add Push Pins Tool
- Position to Current Location Tool



Other Mapping Tools :: Show Map Feature Tool

The **Show Map Features** tool can be used to show details on the map based on where your mouse(curser) is positioned. It will show the:

- City/Place
- Parcel
- County

Click on the **Show Map Features** tool and move the mouse around the map to see the details.

Once you have finished utilizing this tool, click on the button again. When it is in use, the button will be green. When the tool is not in use, the button will be blue.







Other Mapping Tools :: Show Map Information Tool

The **Show Map Information** tool is very similar to the **Show Map Features** tool except you must click on a location on the map.

Clicking on the **Show Map Information** tool and clicking on the map will show the following information:

- City/Place
- Parcel
- County

It will not disappear from your map until you click the **X** in the pop-up window, or the **clear** text under the button

Clicking the **done** text under the button will keep the information pop-up on your map.

When you are done utilizing this tool, click the button again. When it is in use, the button will be green. When the tool is not in use, the button will be blue.









Other Mapping Tools :: Measure Distance Tool

The **Measure Distance** tool can be used to measure distance. This tool is best used when mapping an area based on distance (i.e., working 200-feet East of the intersection).

To use the **Measure Distance** tool, click on the tool then **click once** on the spot you want to start the measurement. Drag the mouse to your desired end point and **double click**. If the area you would like to measure is not a straight line, **click once** at each point the direction changes. Again, **click twice** at your end point to stop measuring.

You can click the **clear** text under the button to remove the measurement line, or click the **done** text under the button to stop using the tool and the measurement will remain visible.





How to Utilize the Manual Mapping Tools

Other Mapping Tools :: Add Push Pin Tool

The **Push Pin** tool can be used to add a push pin to the map. You can add as many push pins to your map as you would like.

To add a push pin to the map, click on the **Push Pin** tool button and then **click once** on the map, where you would like the pin to appear. The push pin will appear as a red marker. This tool is best used to mark a significant area before zooming in/out on the map, or when repositioning the map to another location.

Please be aware that Push Pins should not be used in the sense of drawing a polygon to identify where you have underground facilities. Push Pins will not be saved to the map once you hit Save Changes.

You can remove the push pins by clicking on the **clear** text under the button, or click the **done** text under the button to stop using the tool and the push pins will remain visible.







Other Mapping Tools :: Position to Current Location Tool

The **Position to Current Location** tool is the last manual mapping tool. This tool is best utilized to quickly get the map zoomed into an area near you.

To utilize the tool, click on the **Position to Current Location** button. You will notice that this is the only tool that will not turn green after clicking. The map will automatically change and center in on the geographic location based on the device you are using. Your device's location services will need t







How to Create a Member Map

Empty Registration Map :: Explanation

The **Empty Registration Map** starts from an empty map version of New York state. In this option, the mapping contact can use the **Map View** and **Drawing Tools** to create their Service Area registration map.

With the drawing tools, you will draw polygons in the area(s) where your Service Area has underground facilities and wish to be notified of location requests taking place in that area.

Let's go through each step of creating a registration map from an empty registration.

Empty Registration Map :: Drawing Tools and Suggestions

Depending on the Members facility coverage, select mapping tools will work best for mapping those areas.

Here are some examples of how one might map their facilities and which tools works best:

- Street: Draw a Line
- Intersections: Draw Circle
- Place look-up: Draw Polygon
- Address/Parcel: Buffer Street / Map Feature
- GPS Coordinates: any tool
- Cross Country: Draw Polygon / Draw Rectangle

See Mapping Tool section starting on page 22 for more information.

Empty Registration Map :: Creating A Service Area Registration Map

When you open the registration version you have added to start creating your new service area map, you will use the **Search Tool** to have the map pull up an area where you have underground facilities. Using the **Drawing Tools** begin drawing a polygon on the map.



Please note:

A polygon is used to identify where you have underground facilities on the map. You can have more than one polygon or one polygon, it all depends on how big your service area coverage is. It is important to remember your service area registration map needs to include all areas for all utilities you own and/or operate. As there can only be on active registration map.

Each time you draw a polygon, you need to follow up using a **Secondary Action Tool such** as:

- Add/Append
- Remove/Cut
- Cancel/Discard

Empty Registration Map :: Secondary Action Tools

Once you have drawn a polygon there are some **Secondary Action Tools** that will appear. These Secondary Action Tools are key to manually drawing a map or making updates.

These action tools include:

- Add/Append
- Remove/Cut
- Cancel/Discard



Empty Registration Map :: Secondary Action Tools



Add/Append the feature to the Registration Map

This tool is used when you are adding an area to the registration map. Once you draw an area and de-select the polygon the Secondary Action Tools will appear just below the Draw a Line tool.

Once you click on the **Add/Append tool** the polygon will remain blue however the grid lines will tighten and become darker.



Remove/Cut the feature from the Registration Map

This tool is used when you are removing an area to the registration map. This can be used within the Empty Registration option, however, is more used within the Copy of an Existing Registration.

Once you click on the **Remove/Cut tool** the polygon will turn green and the grid lines will tighten.



Cancel/Discard

if you made a mistake drawing a polygon and want to remove what you started to draw.

For example:

You were drawing a polygon along a roadway and extended further than you wanted. You can deselect the tool by double-clicking and then select the Cancel/ Discard. This is the tool to use immediately after drawing a polygon.





Empty Registration Map :: Complete Registration Map

Now that you have mapped the areas on the **Empty Registration Map**, you will want to give it a look over to make sure all the areas that you are **Adding/Appending** are visible and blue grid lined.



You will click on the **Save changes** that is located on the top left corner just outside of the map.

Save changes

This will add a Radio Dial note on the left margin. At this point if you realize you need to make more changes adding/removing you can continue to do so on the map. Please make sure that after you draw a polygon you are selecting Add/Append or Remove/ Cut otherwise those changes won't be saved. Once you have completed making those changes click Save Changes. If you didn't make additional changes the Save changes

becomes Complete.

<u>Complete</u>

If everything looks correct and you are ready to have Member Support review and activate the new registration version, please select the **Complete button**. Member Support will then be notified that a new registration version is ready to be reviewed and activated.

Existing Version :: Explanation

When utilizing the option to **Start with Registration Map from Version**, you are creating a new version under the **Registration tab**. However, this new version is making a copy of the registration version selected.

This option is used when the member needs to expand their coverage or remove areas from their covered areas. With this option, the mapping contact can use the **Map View** and **Drawing tools** to make changes to the existing Service Area registration map.

With the drawing tools, you will draw polygons to add in new areas and/or draw polygons over existing areas that you want to remove from your Service Area map.

Let's go through each step of modifying an existing Service Area Registration map.

Existing Version :: Drawing Tools and Suggestions

When wanting to add or remove areas from an Existing Registration map there are some tools that may work easier than others.

Here are some examples of how one might use the drawing tools to add to the map:

- 1. Street: Draw a Line
- 2. Intersections: Draw Circle
- 3. Place look-up: Draw Polygon
- 4. Address/Parcel: Buffer Street / Map Feature
- 5. GPS Coordinates: Any tool
- 6. Cross Country: Draw Polygon / Draw Rectangle

The best tool for removing areas from the map is the **Draw Polygon tool**. This tool allows you to draw specific areas with no buffer getting in the way and you can get as detailed as needed.

See Mapping Tool section starting on page 22 for more information.

Let's go over mapping and the secondary action tools.

Existing Version :: Mapping and Secondary Action Tools

You will use the drawing tools to draw polygons in the areas that you want to **add/remove from the map**. Make sure that after you draw a polygon you select the **Action Tool** that appears below the **Draw a Line tool**.

Action Tools



Add/Append the feature to the Registration Map

This tool is used when you are adding an area to the registration map. Once you draw an area and de-select the polygon the **Secondary Action Tools** will appear just below the Draw a Line tool.

Once you click on the **Add/Append tool** the polygon will remain blue however the grid lines will tighten and become darker.



Remove/Cut the feature from the Registration Map

This tool is used when you are removing an area to the registration map. This can be used within the Empty Registration option, however, it is more used within the Copy of an Existing Registration.

Once you click on the Remove/Cut tool the polygon will turn green and the grid lines will tighten.



Cancel/Discard

This tool is used to remove a polygon before you append or cut the polygon to the map.

For example:

You were drawing a polygon along a roadway and extended further than you wanted. You can deselect the tool by double-clicking and then select the **Cancel/ Discard Tool**. This is the tool to use immediately after drawing a polygon.





Existing Version :: Adding Areas to a Registration Map

To add areas to the Service Area Registration map, use the **Search Tool** to have the map zoom to the location. Using the **Drawing Tools** draw polygon(s) around the area(s) that need to be added to the map. After drawing each polygon be sure to select the **Add/Append Tool**. If you forget to select the Add/Append Tool and you save the changes; any polygon that has not beenappend will not be added to the map once completed.



Let's go over removing areas from the registration map.

Existing Version :: Draw Polygon Tool to Cut/Remove



The **Draw Polygon tool** is perfect for creating a detailed polygon. It is the best tool to use when you need to remove/cut an area from the map.

When using other drawing tools, they have a buffer that would need to be calculated in the polygon you draw. Additionally, the **Draw Polygon tool** can be as small or as large as you need.

When you are ready to remove an area from the registration map, select the **drawing tool of your choice** and then start drawing a polygon over the red/pink existing service area that you want to remove.

Once you draw the polygon make sure to double-click to deselect the tool and the **Secondary Action tools** will appear. Select the **Remove/Cut the feature from the map tool**. This will turn the gridded polygon green which means it is to be removed/cut once the map is approved from Member Support.



Existing Version :: Complete Registration Map

Once you have made all the changes to the registration, click on the **Save changes button** on the top left corner outside of the map.

This will add a note on the left margin, if you have more changes to make you can continue to do so on the map. Make sure to append or cut after drawing each polygon.

It is important to note that when you are removing areas, you will want to zoom in as close as possible to make sure you selected all of the area(s), if not, when the map is activated, there may be some small areas left that can be picked up when the Excavator maps the purposed excavation area.

For example:

The red/pink area just below the green gridded polygon if not mapped will be left behind and if an Excavator was to call in a ticket in this area and mapped that little sliver would pop up the Service Area.



Existing Version :: Complete Registration Map



Once all the areas have been appended and/or cut and you have selected **Save changes**, the next thing to do is to select the **Complete button** that replaced the Save changes. The complete button will then notify Member Support that you have Completed the updates for the new registration version. Member Support will then review the changes and activate the map.

If there are any concerns with the updates Member Support will contact you to discuss before approving and activating the map.

Once the map has been activated the Mapping Contact who completed the changes will receive an email from Exactix, informing them that the new Registration Version has been activated and that they should review the map to see that the changes look correct.

Hello from UDig NY!

Your Service Area Registration changes have been approved for Service Area TOWN OF COVINGTON (TWN COVINGTON).

You can view the registration map here. The Registration can now be set to 'Active' to begin using it to notify the Service Area.

Please do not reply to this email as it is not monitored. For further assistance, please visit our website to learn how to contact us.

Importing Shape Files :: Explanation

The **Import from ESRI Shape File Layer** is used by Members who have GIS Software or a GIS company they utilize for maintaining their service area coverage. The GIS software will create file extensions that can then be imported into Exactix to create a Service Area Registration map.

This option has requirements that need to be met in order for Exactix to read the file extensions.

Let's discuss those requirements needed for Importing Shape Files.

Importing Shape Files :: Requirements

Importing Map File Requirements

- Need to be in Shape File Format
- Must be buffered or a Polygon
- If the Coordinate System is not NAD83 with Lat-Lon Projection, a .prj file must also be included in the upload which will be used to translate the coordinates.

Shape File Format

A shape file consists of the following file extensions: .shp .prj.dbf and .shx (is optional)

Please note:

When doing a map update to an existing Service Area the existing area and the new areas need to be together in the shape file. This also means all coverage areas need to be included in the file. Some members may have separate shape files for mains and laterals; these would need to be combined as only **one (1) registration version** can be active.

How to create a Member Map

Importing Shape Files :: How to Import Shape Files

On the **Registration tab** within the **Service Area profile**, select the **Add button** on the right side of the Registration line.

Registration		add
Version 3	Not Complete	Complete

The **Registration window** will open. Select the **Import from ESRI Shape File Layer** option this will open more information on the right side of the window.

Choose how to create the new Registration:	Select ESRI Shape Files to Upload:	
O Start with Registration Map from Version:	Select or drag-and-drop the ESRI Shape Files with extensions .shp, .prj, .dbf, .shx (optional). The .dbf file is o required if including Map Attributes.	les
O Start with an empty Registration Map:	If uploading lines or points, enter the buffer (in feet; minimum of 200ft)	
O Copy Registration Map from another Service Area:	to be applied to the shapes: buffer (ft)	
Import from ESRI Shape File layer:	contains the buffer to apply for each individual feature.	
	Carcel P	5

Next you will select the green **Select Files button**. This will open the **Open Files** window where you will locate and select the Shape Files Extensions you want to open in Exactix.

Remember a Shape File consists of the following file extensions:

- shp
- .prj
- .dbf
- .shx (optional)

Note:

If the Coordinate System is not NAD83 with Lat-Lon Projection, a **.prj file** must also be included in the upload which will be used to translate the coordinates.



Importing Shape Files :: How to Import Shape Files

Once you find the files you want to import you can select all the files at once or repeat the steps for each file. To select files, you can hold down the **ctrl** (windows) or **cmd** (apple) and use your mouse to select each file.

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Once all files are selected click **Open** to have the files opened in Exactix.

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OneDrive -	Persi	Power_Sources.prj	4/5/2024 2:20 PM	PRJ File	1 KB	
	=	Power_Sources.shp	4/5/2024 2:20 PM	SHP File	82 KB	
Desktop	<u>*</u>	Power_Sources.shx	4/5/2024 2:20 PM	SHX File	24 KB	
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Importing Shape Files :: How to Import Shape Files

Registration				
Choose how to create the new Registration: Start with Registration Map from Version: Start with an empty Registration Map:		Select ESRI Shape Files to Upload: Select or drag-and-drop the ESRI Shape Files with extensions .shp, prj, .dbr, .shx (optional). The .dbf file is only required if including Map Attributes. The files you upload must contain your entire coverage area.	Select Files	
Copy Registration Map from another S Import from ESRI Shape File layer.	If uploading lines * Optionally, each lin	or points, enter the buffer (in feet; minimum of 200ft) to be applied to the shapes: ne or point feature may contain an attribute named "BufferFt" which contains the buffer to apply for each individual feature.	buffer (ft) 200	
-		Underground_Utility_Power_Lines.shp		
		Underground_Utility_Power_Lines.prj		
		Underground_Utility_Power_Lines.dbf		
		Underground_Ounty_Power_Lines.snx		
			0	Save

If uploading lines or points, enter the buffer (in feet: minimum of 200ft) to be applied to the shapes:

Exactix will only allow a minimum of a 200-ft buffer that will be applied to the shape once the import is complete. **This field needs to be filled in.**

Please Note:

If you are looking for a smaller buffer than the standard 200-ft, you will need to add the buffer within the Shape Files. The minimum buffer you can do is 50-ft.

Now that the files are listed, and the buffer is filled in, select the **Save button** on the bottom right-hand corner of the Registration window.

Importing Shape Files :: How to Import Shape Files

The Files Uploaded window will open with the following message:

The files have been uploaded to the server and have been queued for processing. You will receive an email when the processing has been completed.

Click on the **OK** button.

Depending on the file size the processing may take some time to complete. The import is not complete until you receive the email and follow the steps listed. The email will come from **Tickets@Exactix.UDigNY.org** once the import has completed and is sent to the email address associated to the web user who uploaded the shape files.

Once you receive the email, click on **here (hyperlink text)** or copy and paste the web address in your web browser address bar. This will take you to the map view where you can look over the import changes.



- Your import needs to include the existing areas and the additions or removal area(s).
- The solid red/pink color polygon(s) is the existing service and is staying.
- The blue polygon(s) are being added to the service area map.
- The green polygon(s) are being removed from the service area map.



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How to create a Member Map

Importing Shape Files :: How to Import Shape Files

If the changes look correct, select the Complete button located on the top left-hand corner outside the map to complete the import process.



A confirmation window will open to confirm the map is ready to be submitted. Once you select the final Complete button on the window, the Member Support Team will receive notification that a new Registration Version has been submitted and is ready for them to review and activate.

If you do not select **Complete** member support will not be notified and your map will not be activated. It is very important if the map is correct and ready that you select the **Complete button**.

Your import of shape files is complete.

If you received an error or failure during the import process, please review the previous steps and try importing again. If the issue continues, please contact the UDig NY Member Support team at membersupport@UDigNY.org.

Complete Registration

This will submit the registration for review by the One Call Center.
These changes will add 1.06 sq miles (21,683.27%) and remove 0.00 sq miles (100.00%).
This will result in an overall increase of 21,583.27% compared to Version 2.
I confirm that this is correct
Are you sure you are finished making changes and ready to Complete the registration?
Cancel
Complete