LARGE PROJECTS

A Guide for Exactix Users

This manual provides step-by-step guidance for using Exactix to create, manage, and maintain Large Project locate notices. It covers the full workflow from project setup through phase creation, mapping, contact assignment, marking agreements, and final submission. It also explains how to manage project dashboards, invitations, alerts, and public project views, as well as how to update phases, extend project timelines, and maintain contacts and attachments throughout the life of a project. Finally, it reinforces key responsibilities for excavators, including ticket management, positive response verification, and ensuring compliance with all legal notification requirements, emphasizing that Large Projects support coordination but do not

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Exactix811 Workflow for Large Projects

Introduction

1. Introduction to Large Projects

A Large Project locate notice is used for excavation projects that extend beyond the scope of a standard locate request due to the size, duration, or complexity of the work area. Large Projects often require additional coordination between excavators and Member Operators to ensure utilities are properly identified and marked throughout each phase of the project.

This manual provides guidance on processing Large Project notices, including scheduling meetings, documenting marking agreements, entering phases, and maintaining accurate project information. Properly managing Large Projects helps ensure clear communication, safe excavation practices, and compliance with state law and notification requirements.

This manual is intended as a general reference guide for users of the Large Project functionality within Exactix. It is not intended to replace, interpret, or provide legal advice regarding federal, state, or local laws, regulations, or requirements related to excavation, damage prevention, or notification obligations. Users are responsible for understanding and complying with all applicable laws and should refer to official legal and regulatory sources for questions regarding legal requirements or compliance obligations.

Prior to accessing or using the Large Project functionality within Exactix, users should review and understand all applicable Exactix Terms and Conditions, policies, and service requirements. Use of the system constitutes acknowledgment and acceptance of those terms and conditions.



Understanding the Large Project Workflow

2.

Large Project Workflow

The Large Project process consists of five key steps. Each step helps ensure the project is properly coordinated and that all participating parties understand their responsibilities.

1. Project Initiation

The Project Initiator must notify SC811 of the Large Project **at least 30 days before the project commences**. This begins the Large Project process and allows time for the required planning and coordination.

2. Planning Meetings

Planning meetings are used to coordinate the project with the excavator and affected Member Operators. Meetings may be scheduled **virtually or in person**, depending on the needs of the

project.

3. Marking Agreements

Marking agreements document **how and when underground utilities will be located and marked** throughout the project. The excavator and Member Operators should work together to establish an appropriate marking schedule based on the project's scope and needs.

4. Tickets Released

Large Project tickets are released based on the marking agreements established during the planning process. Tickets are released **30 days before the latest marking agreement date** to provide Member Operators with the required time to complete their markings.

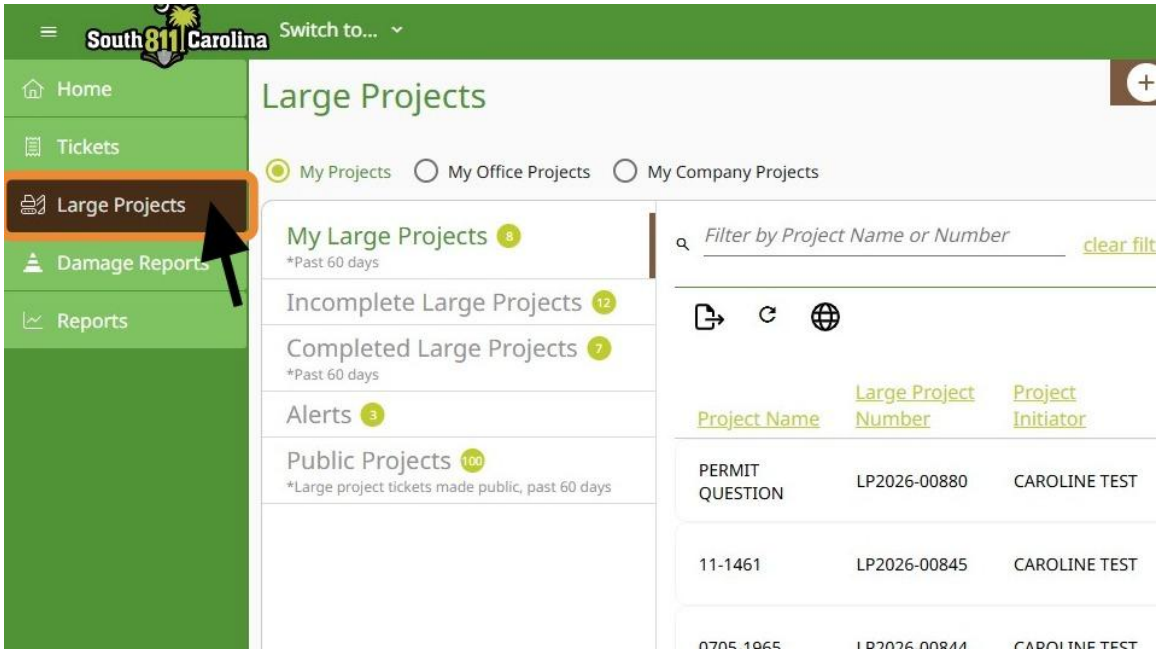
5. Project Management & Completion

Once tickets have been released, the Large Project continues to be managed through its phases. Contacts, phases, marking agreements, and other project details may need to be updated as the project progresses until all work is completed and the project is closed out.

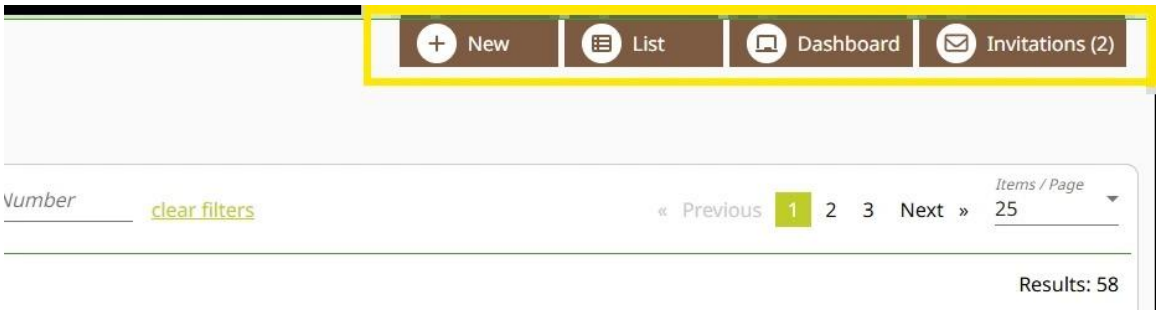
Now that you have an overview of the workflow involved in the Large Project process, the following sections will walk you through each step in more detail.

Navigating the Large Project Workspace

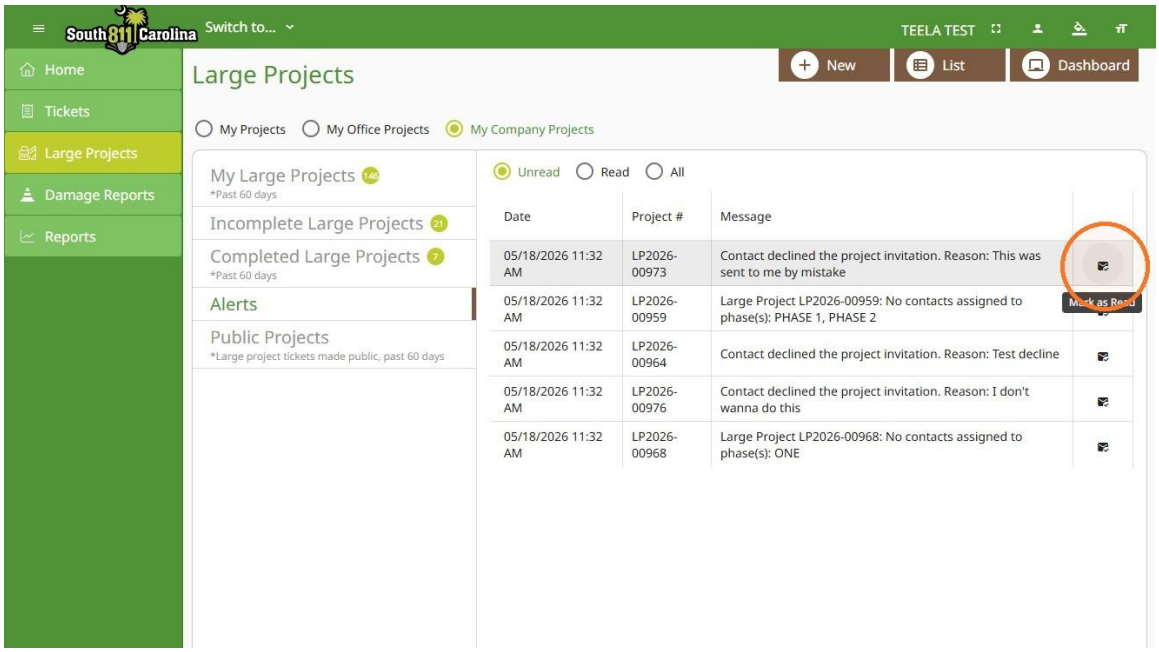
3. Large Projects are located in Exactix, which can be accessed through the left side bar. To begin, navigate to https://exactix.sc811.com/projects/LARGE-PROJECT/dashboard
4. After logging into Exactix, select Large Projects from the navigation menu on the left.



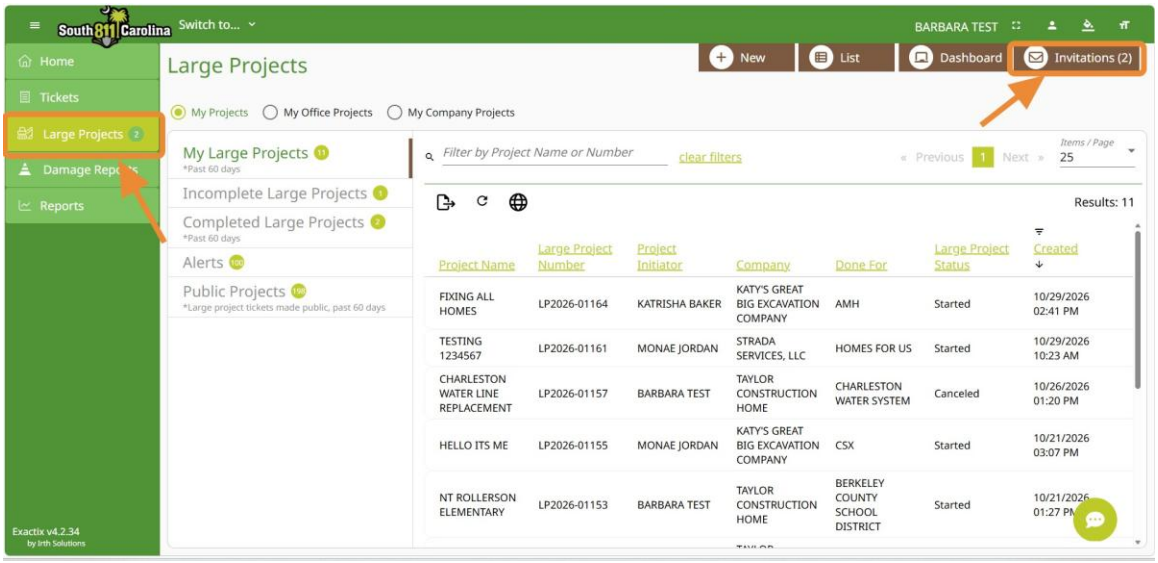
5. At the top right of the screen is a menu.
   "**New**" - this button is for creating a new large project.
   "**List**"- this displays a list of all large projects that you have access to.
   "**Dashboard**"- returns you back to this main dashboard view.
   "**Invitations**"- will only appear if there are pending invitations for you to accept/deny.



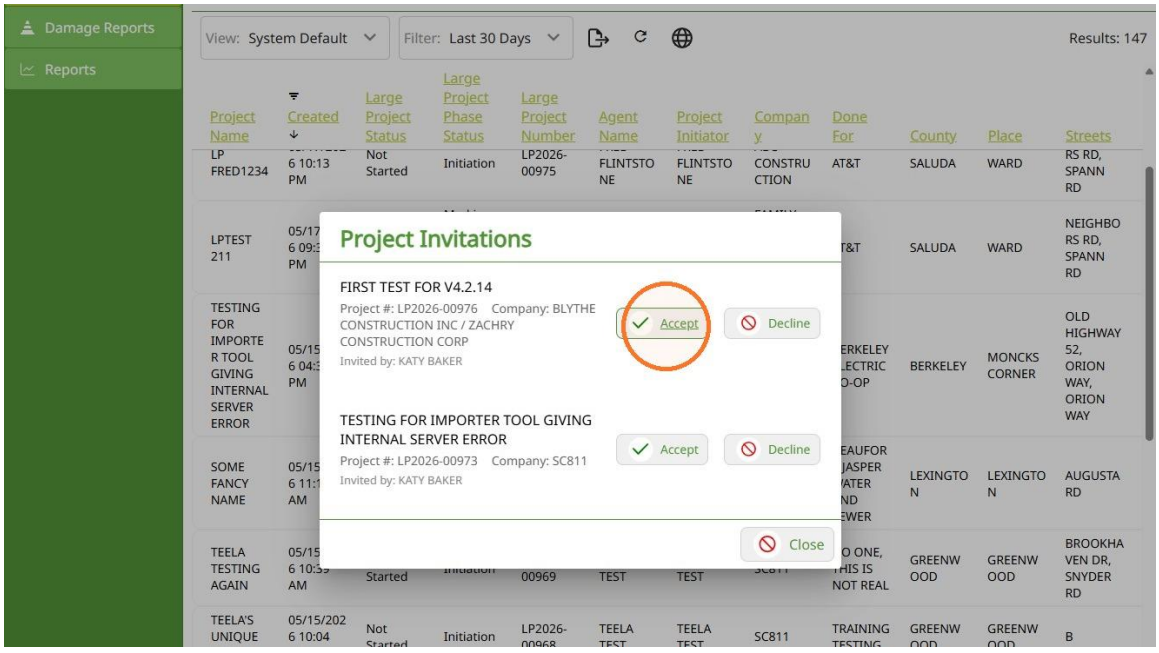
6. Within **Alerts**, you can further filter notifications by selecting **Unread**, **Read**, or **All**. Clicking on an individual alert will take you directly to the associated project for quick access and review. After reviewing an alert, click the **Mark as Read** icon on the far right to update its status and remove it from your unread alerts list.



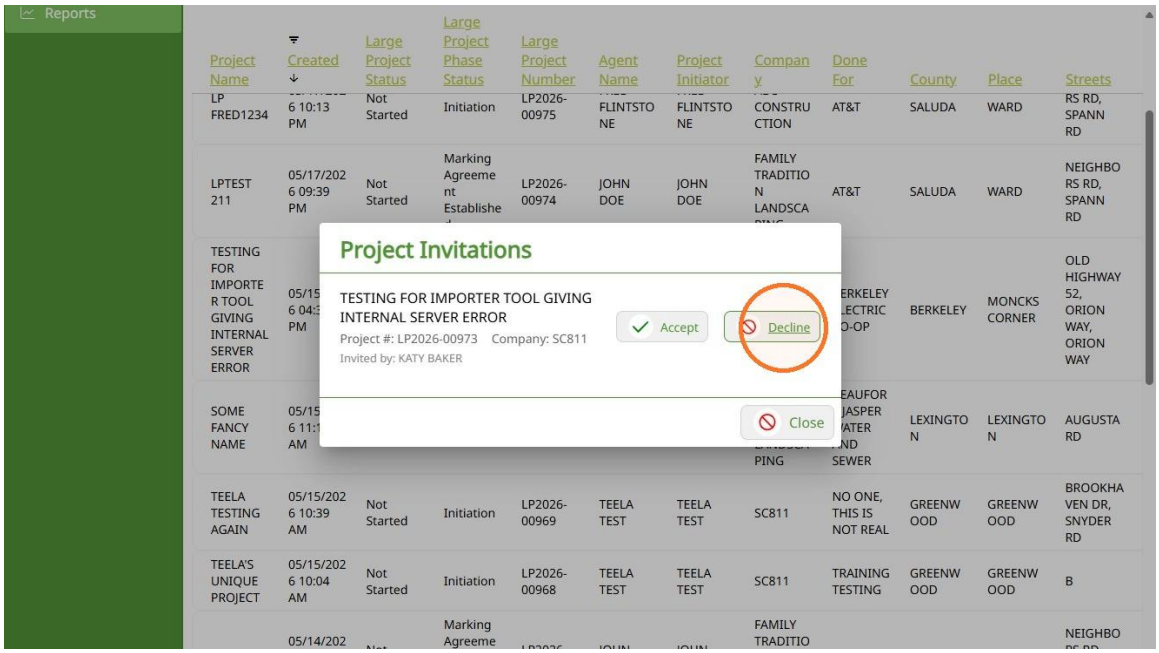
7. When there is a pending Large Project invitation, there will be a number on the Large Project tab to alert you that you have pending invitations. On the Large Projects Dashboard select **Invitations** from the menu in the upper-right corner of the screen, to view projects that you have been invited to participate in.



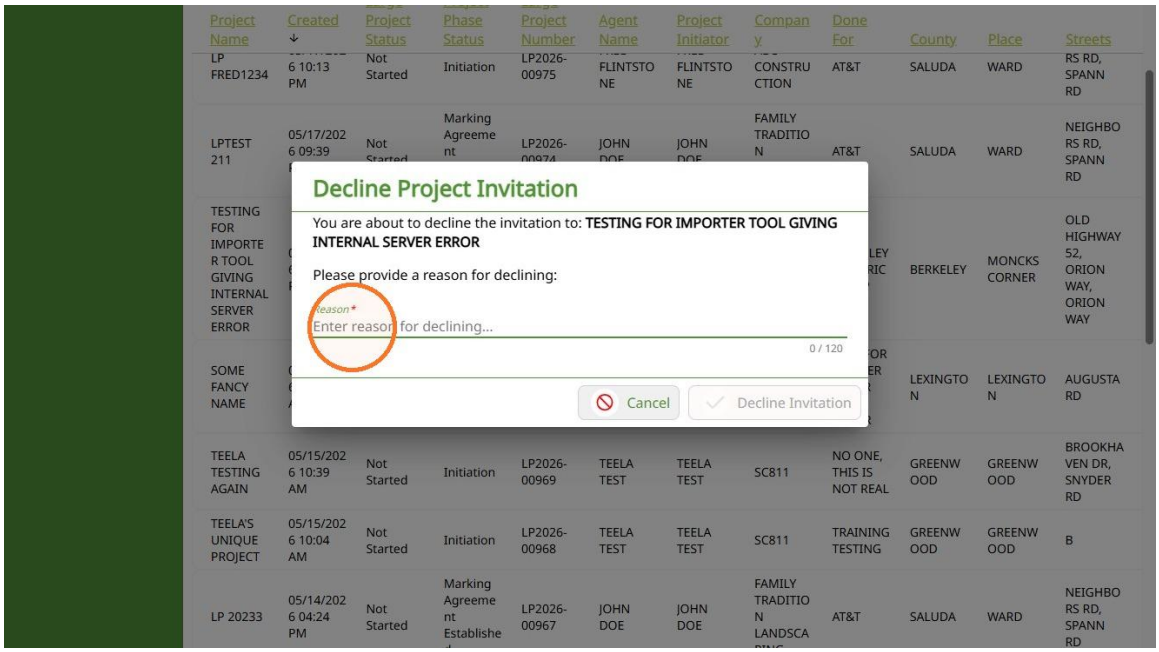
8. A pop-up window will appear displaying all pending Large Project invitations and their details. To accept an invitation, select **Accept** next to the corresponding project.



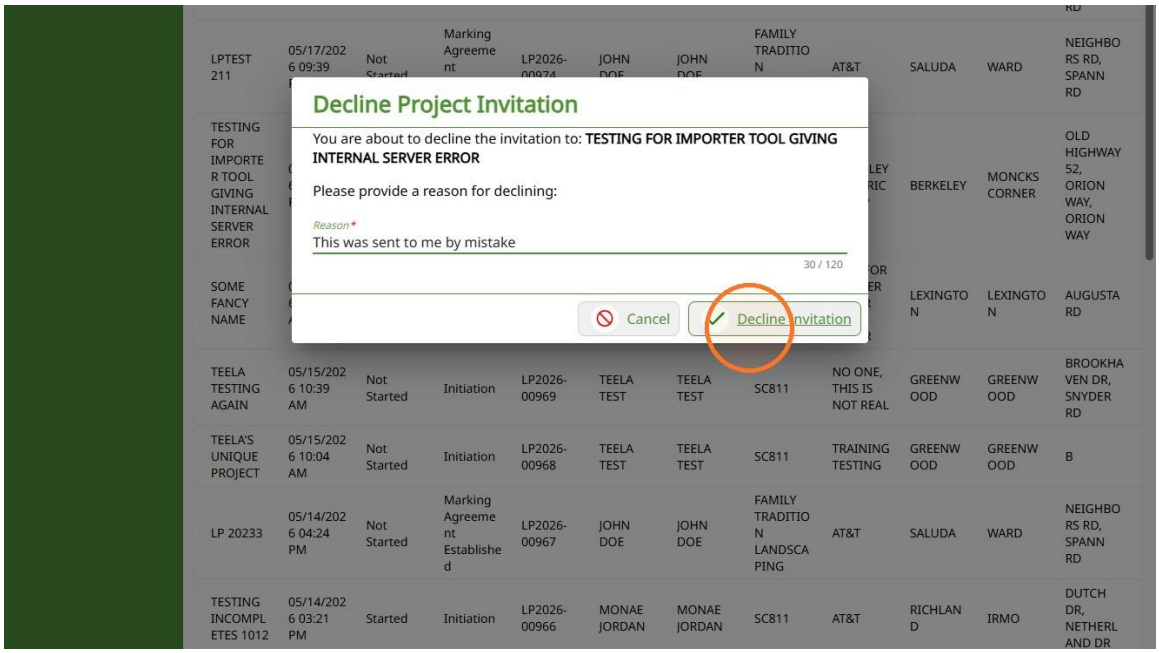
9. To decline an invitation, select **Decline** next to the corresponding project.



10. When declining an invitation, a text box will appear prompting you to enter a reason. Provide a brief explanation in the text field to inform the project initiator why the invitation was declined.

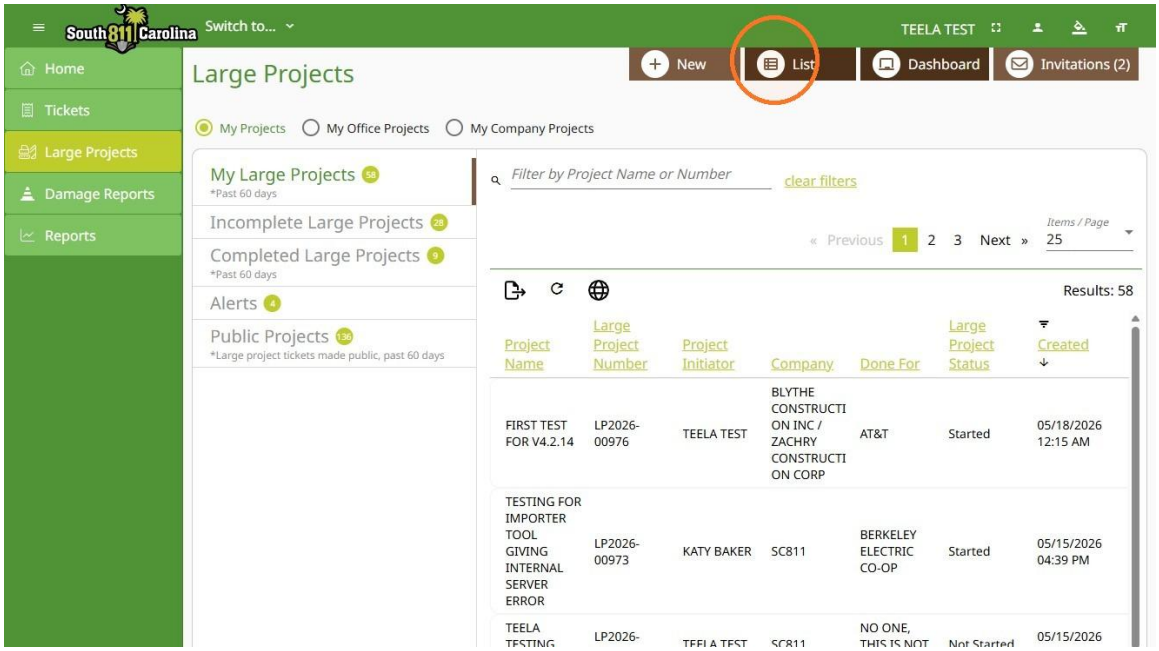


11. To confirm the decline, click **Decline Invitation**.

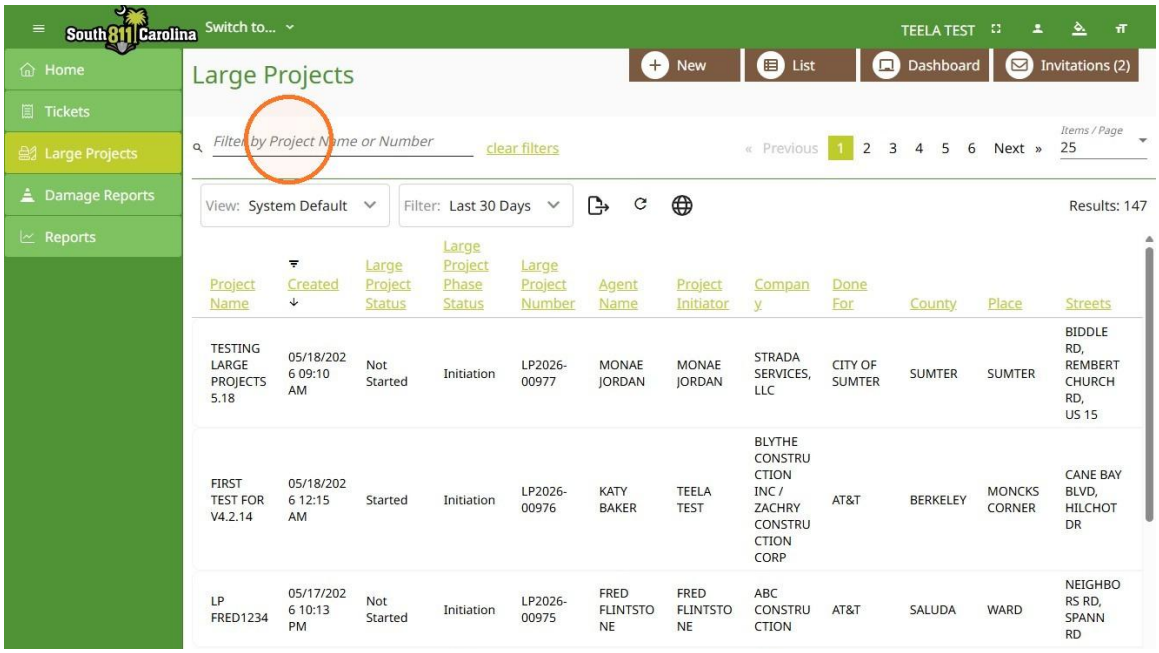


12. **Viewing All Large Projects**

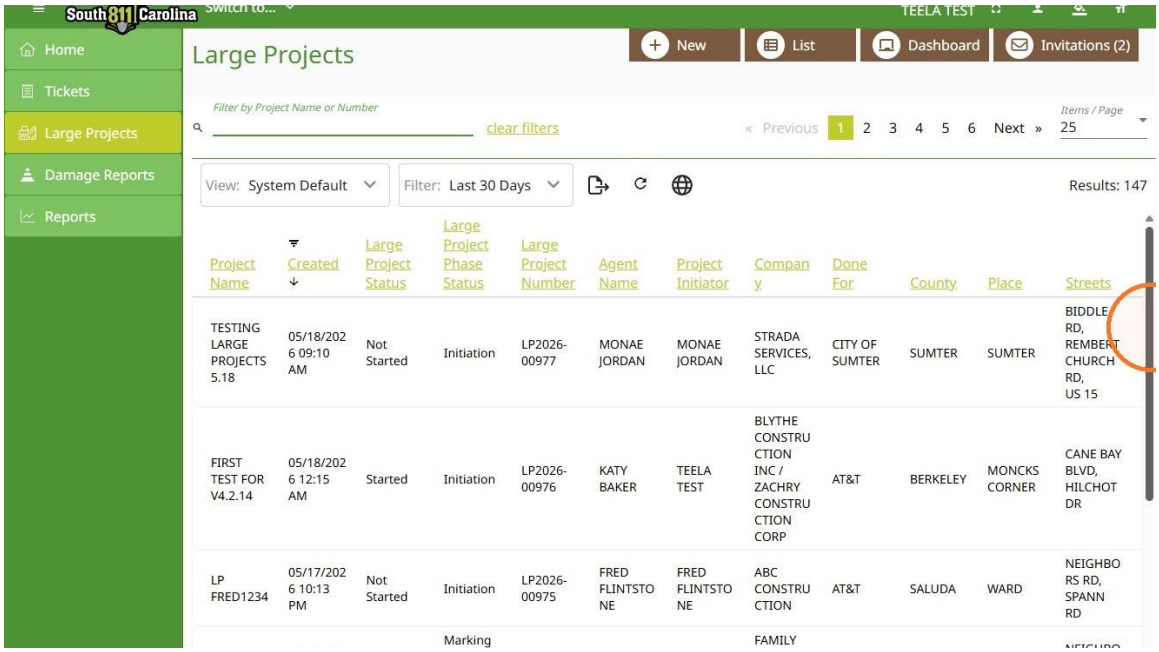
    To display a complete list of all Large Projects you have access to, select **List** from the menu in the upper-right corner of the screen. The List view displays all Large Projects associated with your account, including projects created by you or your company, as well as projects where you have been invited to participate.



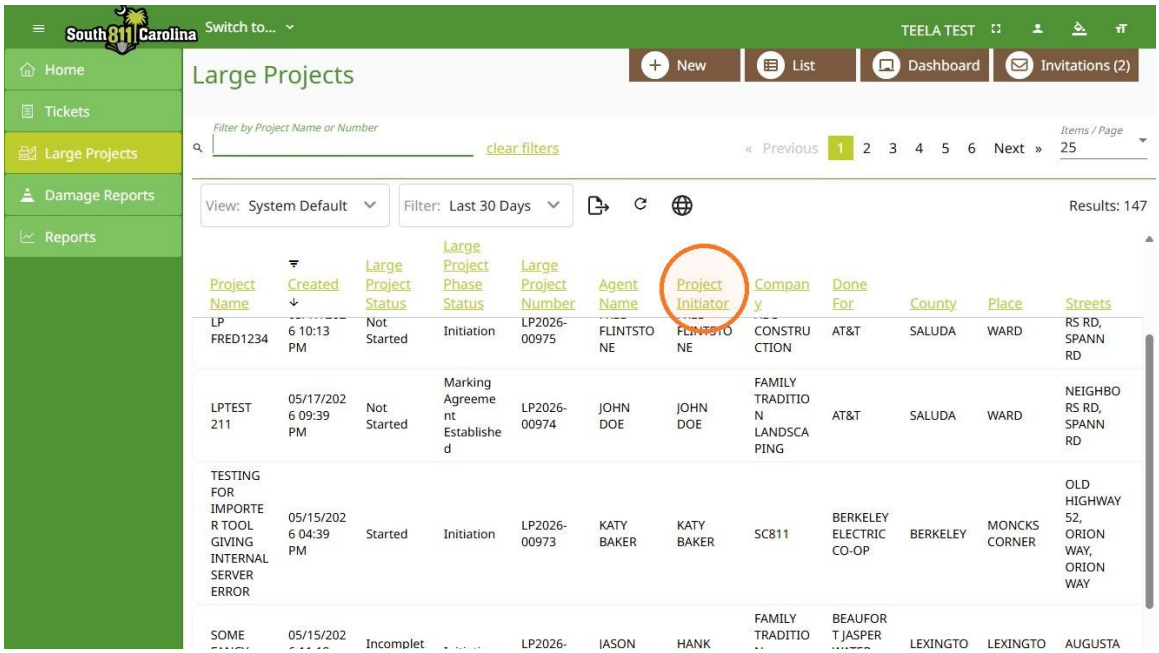
13. From the List screen, you can filter projects by entering a Project Name or Project Number in the search bar located in the upper-left corner of the page



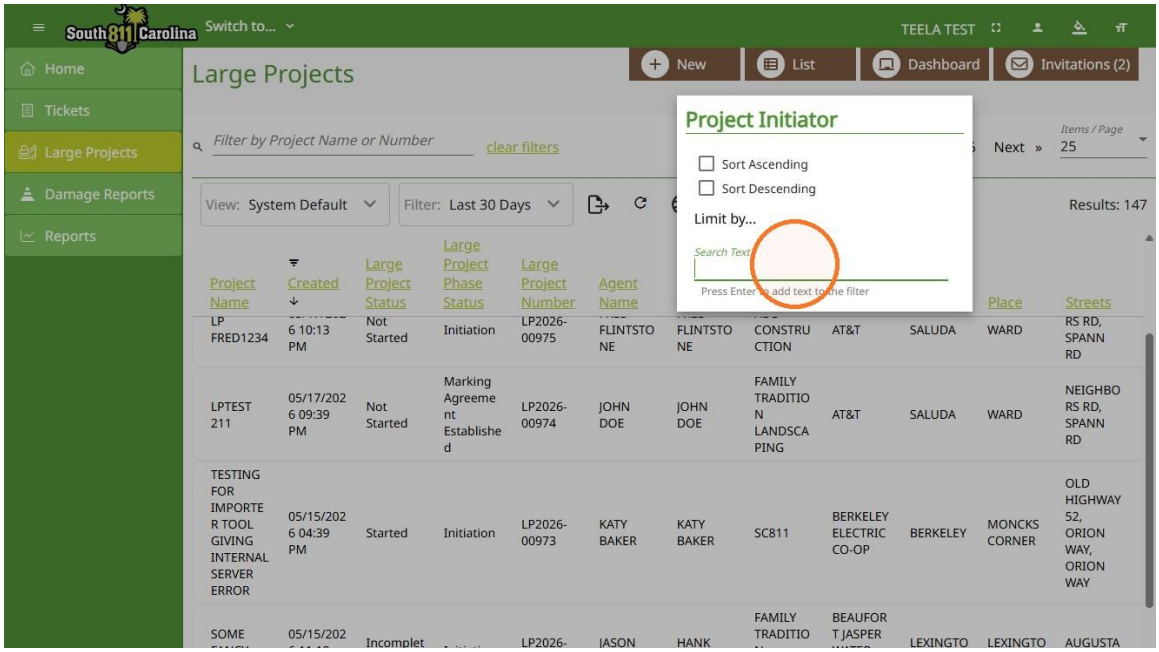
14. Use the scroll bar to navigate through and view the full list of available Large Projects.



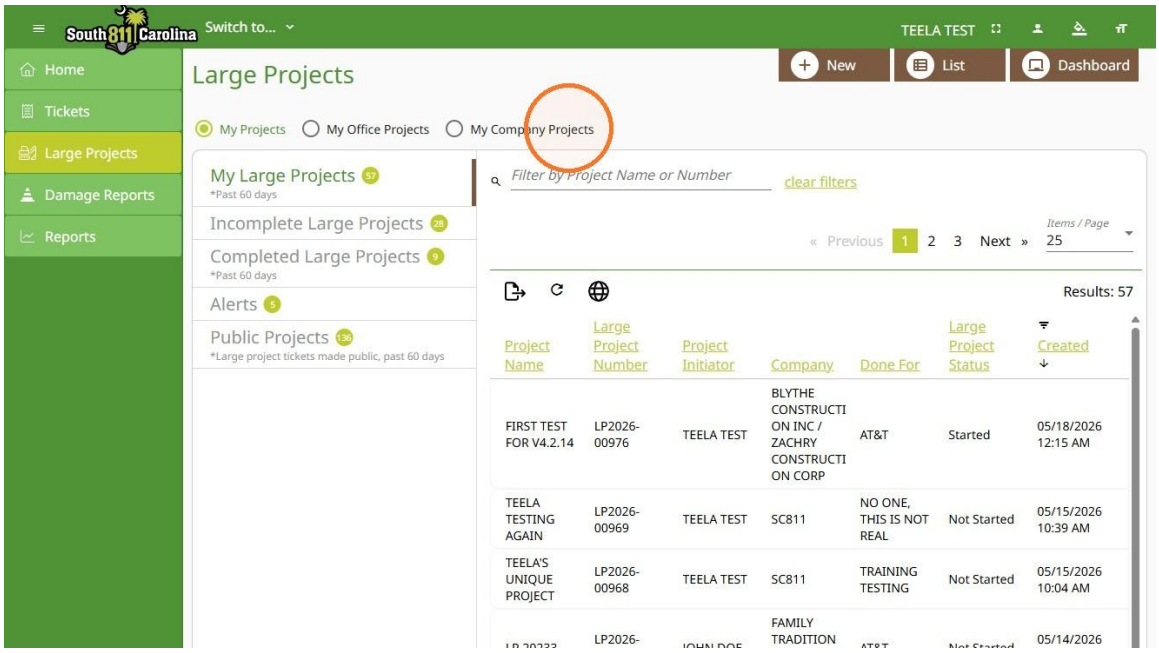
15. You can also sort and organize the list by selecting any column header to filter or arrange projects by that field.



16. You can also use the column headers to limit results by specific criteria and sort information in ascending or descending order.



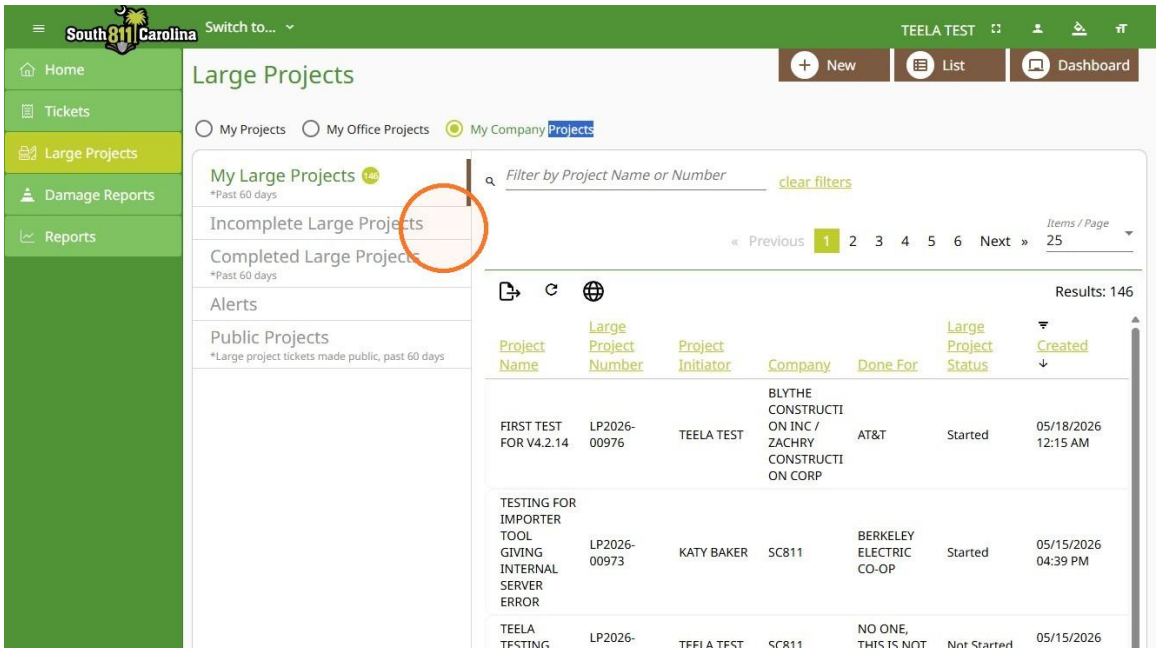
17. On the dashboard, you will also see filter options across the top for **My Projects**, **My Office Projects**, and **My Company Projects**. Selecting any of these options will filter the dashboard view accordingly to display the relevant set of Large Projects.



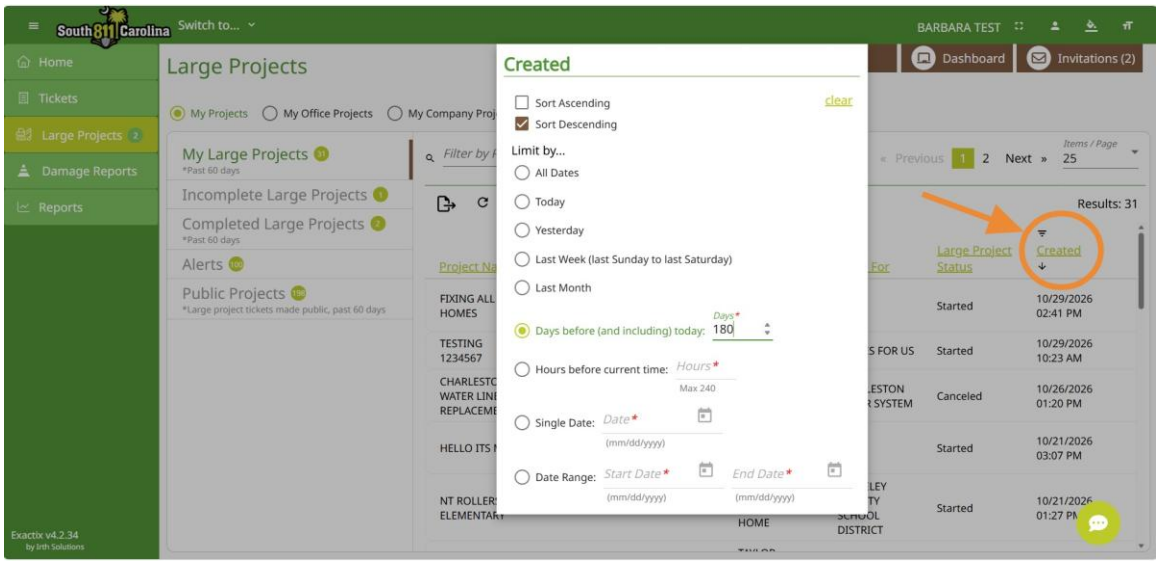
18. The menu on the left side of the dashboard allows you to filter and navigate Large Project information. The available options include:

- **My Large Projects**: Displays projects you have entered within the last 60 days.
- **Incomplete Large Projects:** Displays projects that have been started but not fully submitted. If a project remains incomplete for two months or longer, the Help Desk will reach out to offer assistance. If we are unable to connect with you, the project may be voided.
- **Completed Large Projects:** Displays projects completed within the last 60 days where all phases have been finalized.
- **Alerts:** Displays system notifications related to your projects.

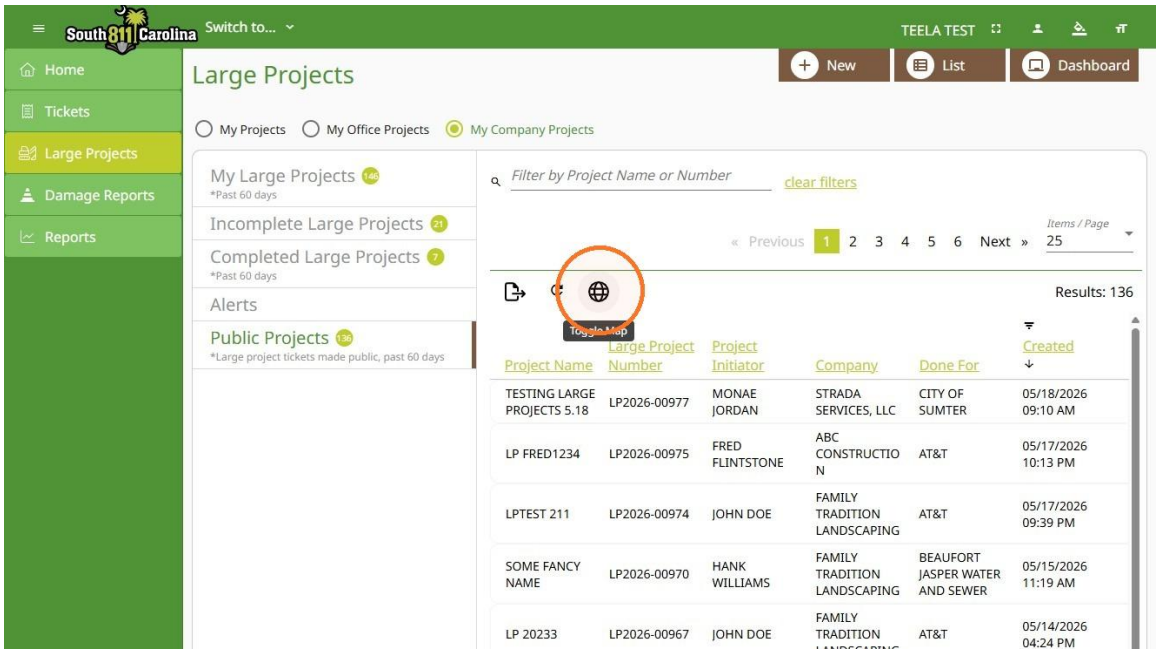
- **Public Projects:** Provides a view-only list of all publicly available Large Projects.



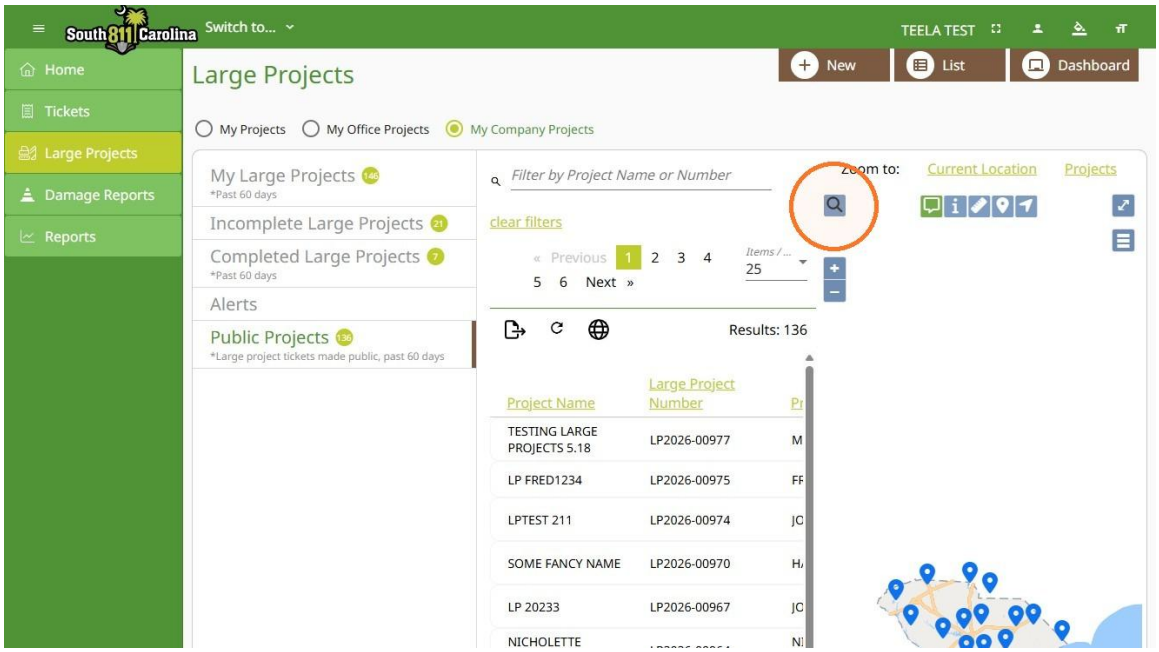
19. To search for a project that was created more than 60 days ago, directly from the LP Dashboard. Clicking on the header for the **Created** column will open a pop-up box that gives the option to filter by a specific date, a date range or even a set number of days.



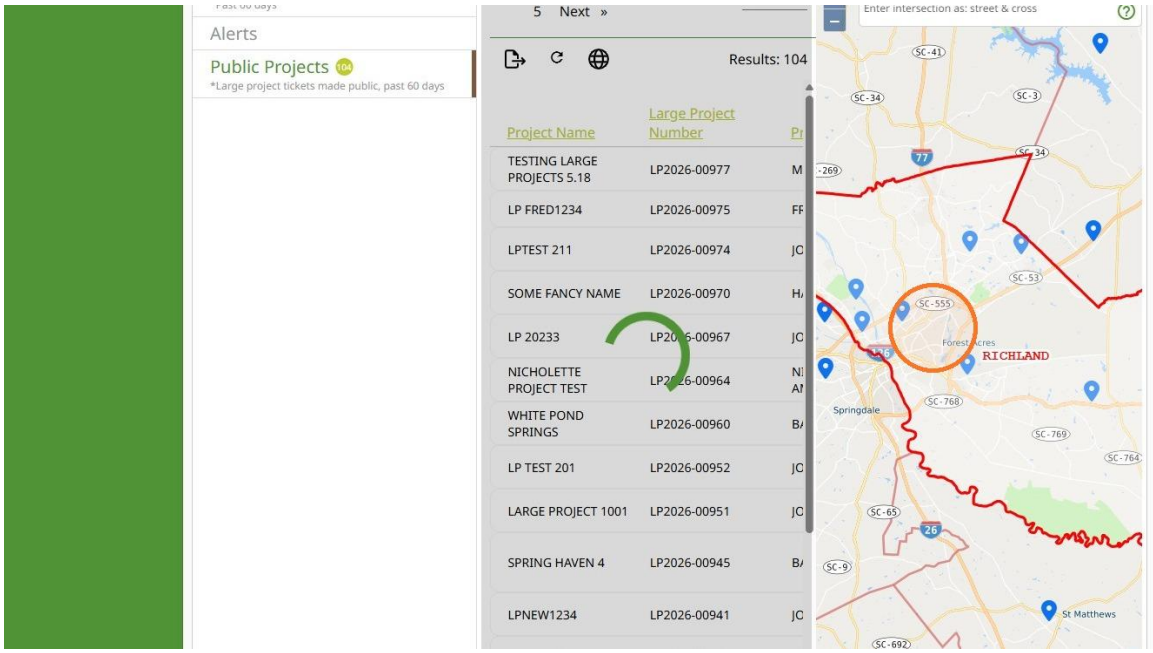
20. The **Public Projects** filter allows you to view all public projects displayed on a map. To switch to the map view, click the **Toggle Map** icon above the list.



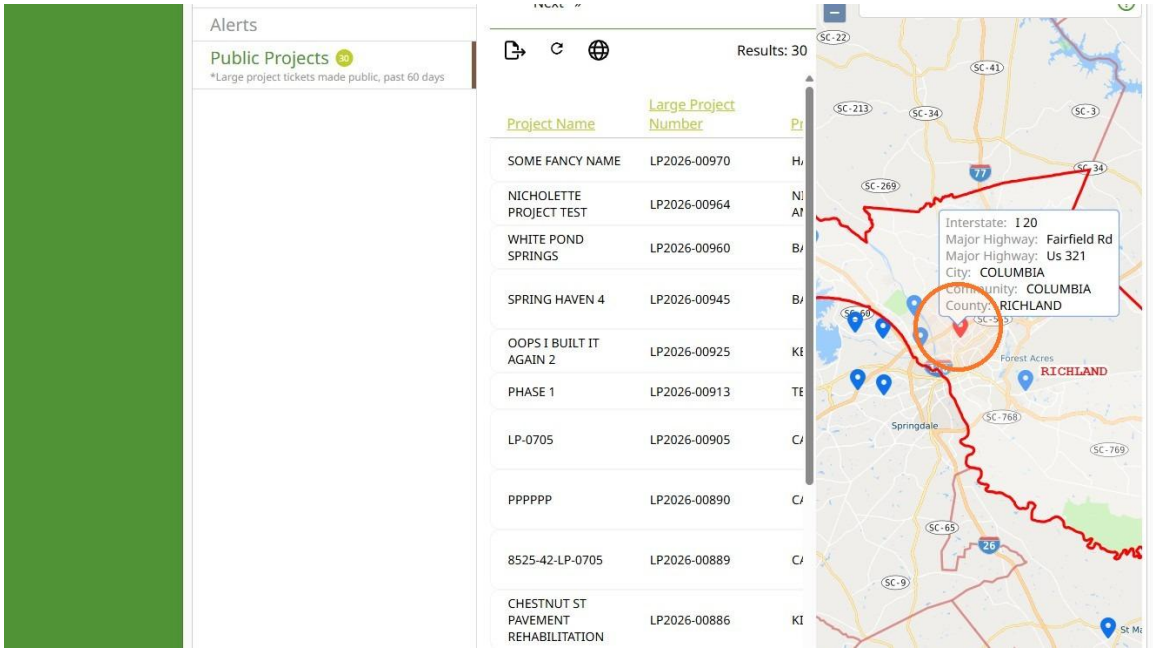
21. To search a specific area, click the **Search** icon in the upper-left corner of the map.



22. As you search or navigate the map, the list will automatically update to display projects within the selected or visible area.

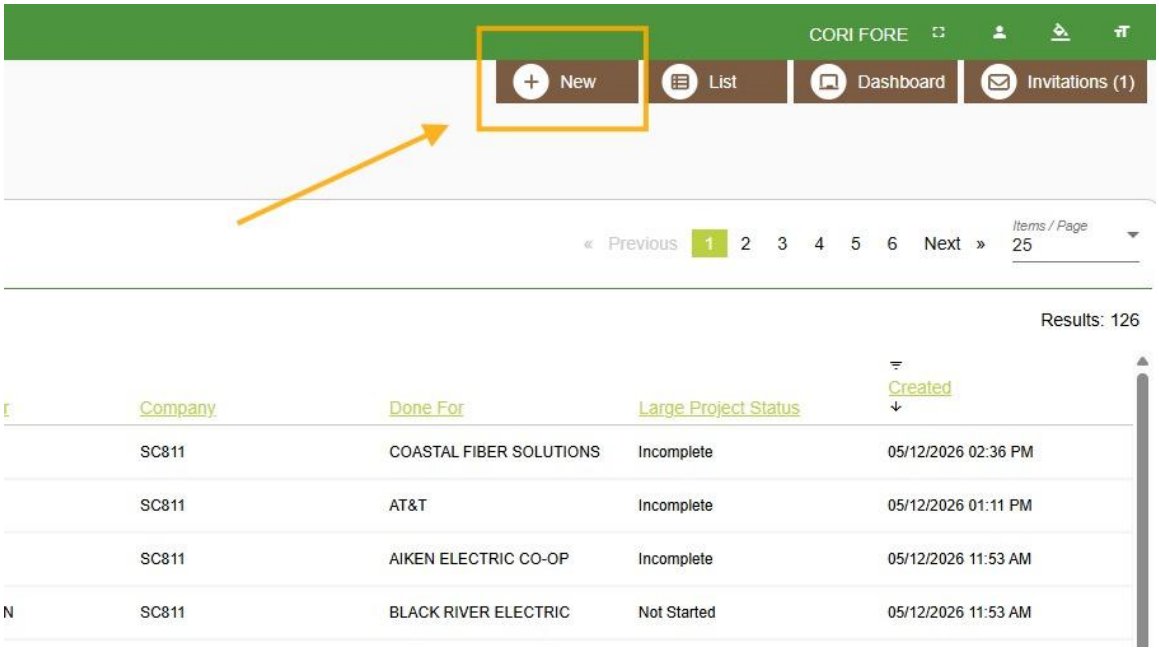


23. Clicking on a push pin on the map will display detailed information about the corresponding project.

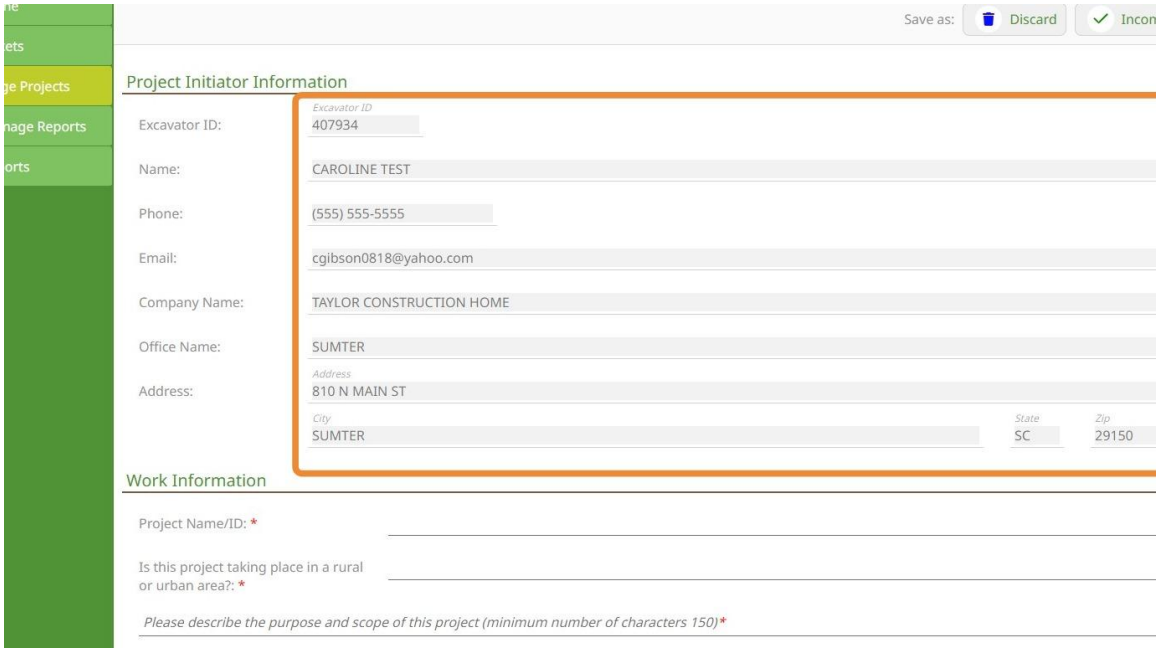


Creating a New Large Project

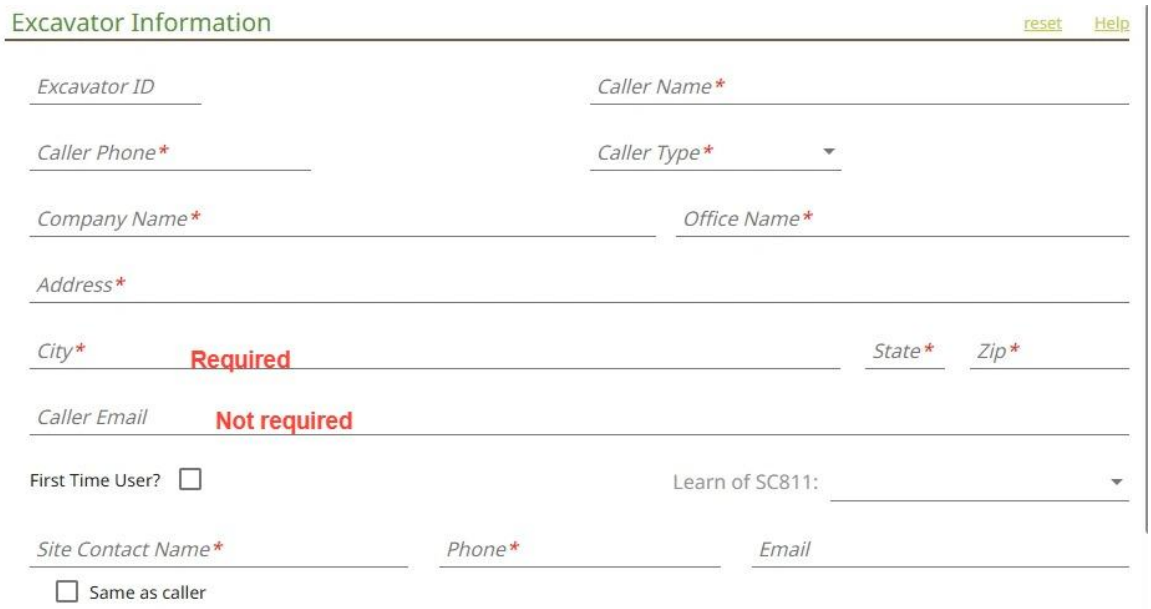
24. To create a new Large Project, select **New** from the menu in the upper-right corner of the dashboard within the Large Project tab.



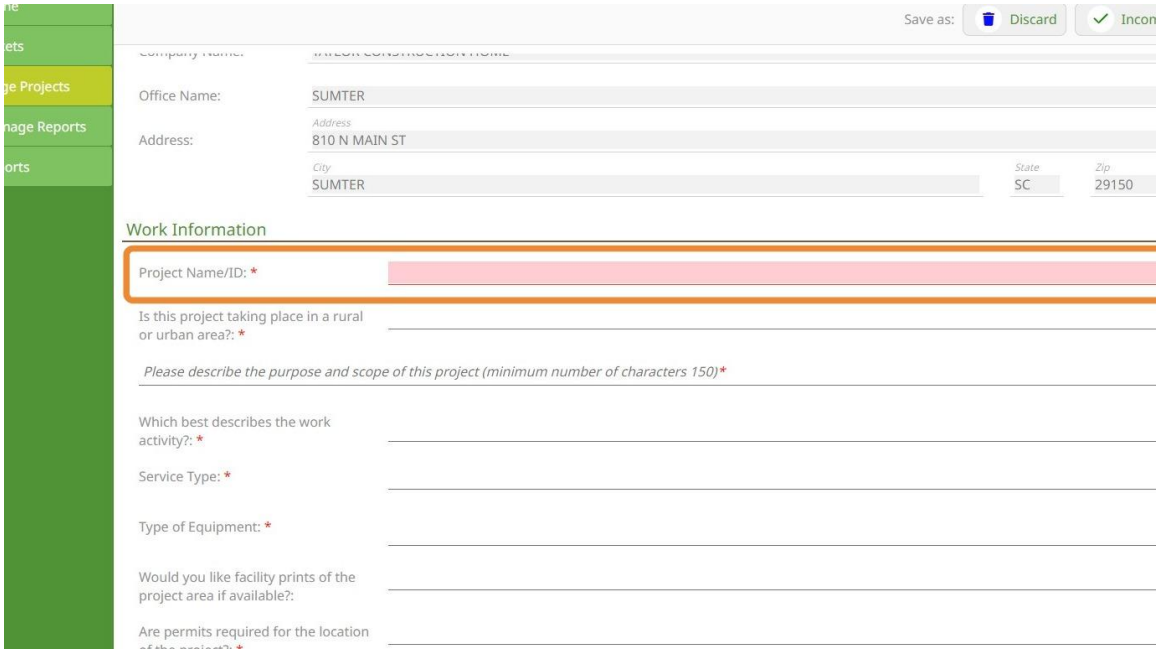
25. Your profile information will automatically populate as the project initiator. If any updates are needed, please contact the SC811 Help Desk via chat or phone for assistance.



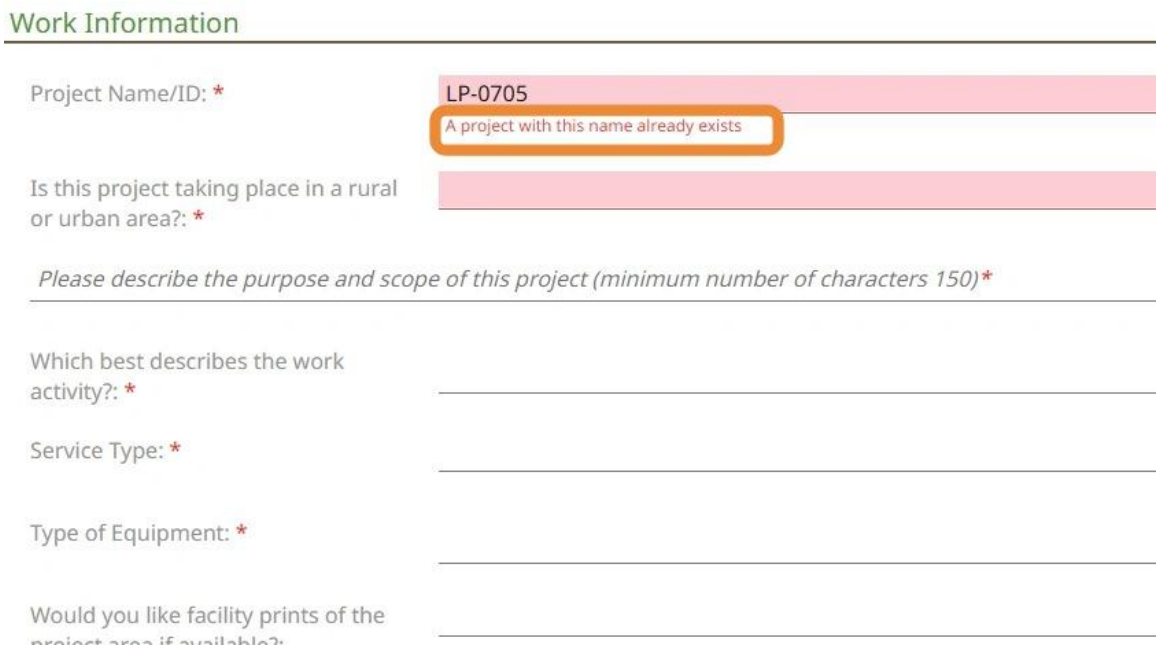
26. All fields marked with a red asterisk (*) are required and must be completed before you can proceed.



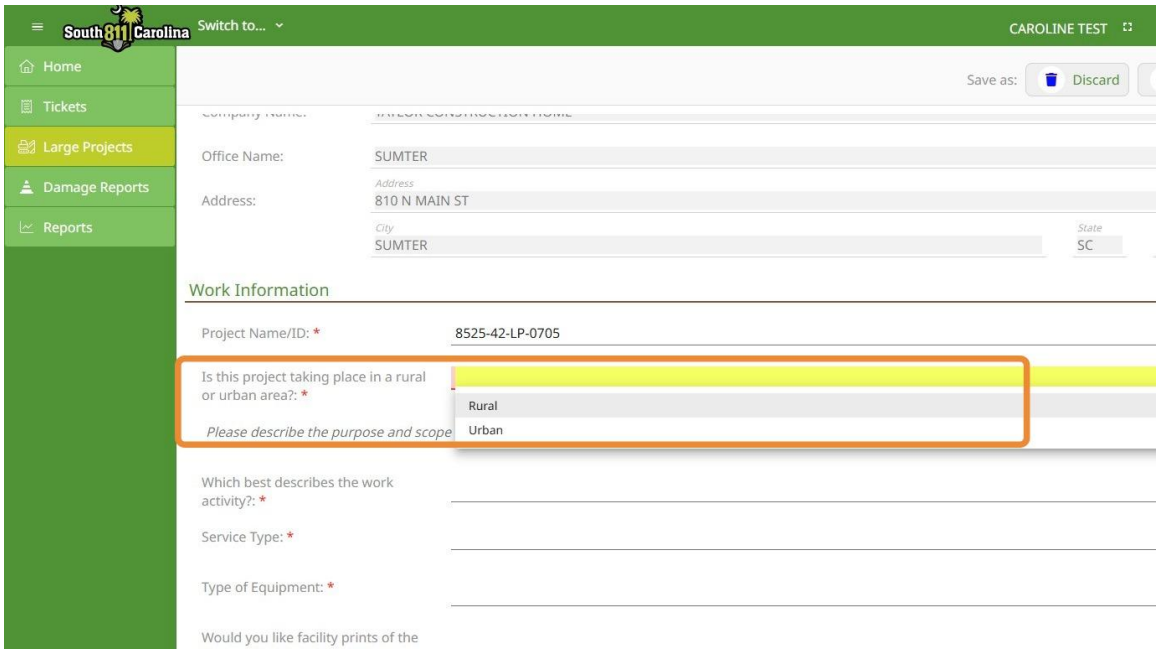
27. **Work Information field**
The **Project Name/ID** field serves as the unique identifier for your project. This reference is specific to your project and must be unique; no duplicate values are allowed.



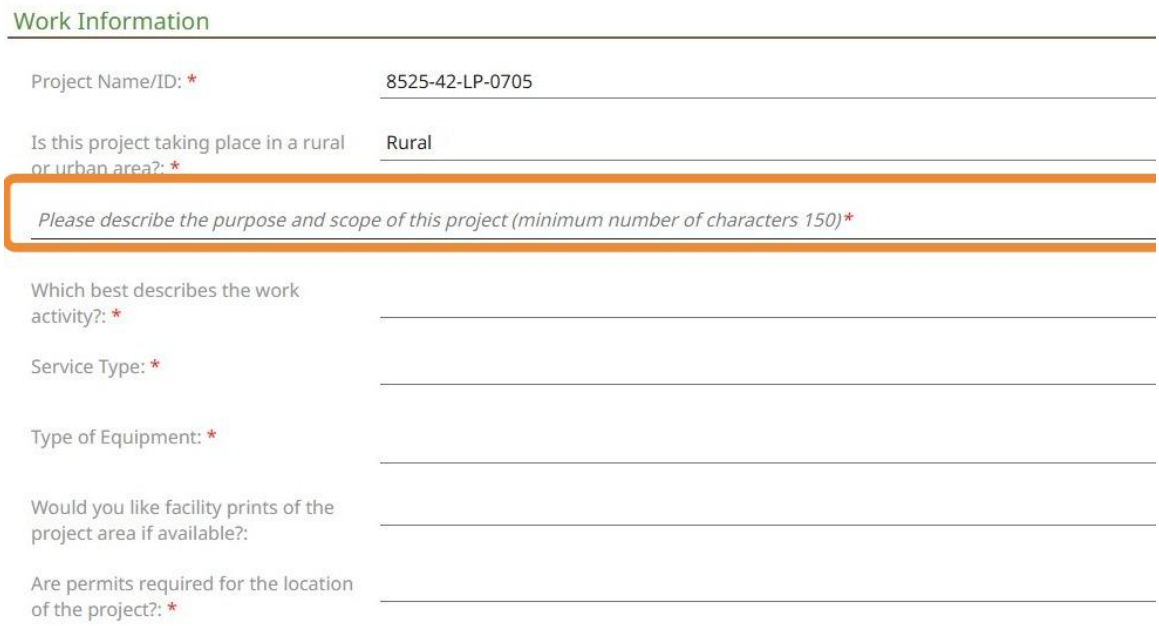
28. If the Project Name or ID has already been used, an error message will appear. You will need to enter a new, unique Project Name or ID before you can continue.



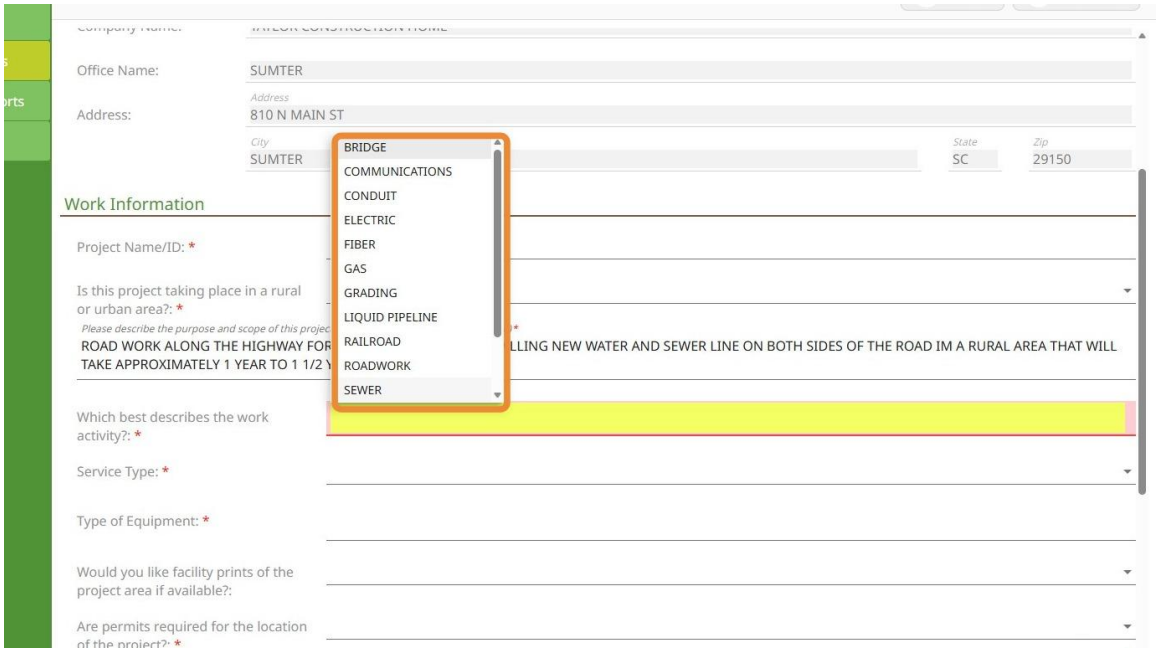
29. Next, select whether the project area is **Urban** or **Rural**. This designation should be based on your assessment of the project location and helps Member Operators determine appropriate manpower and resource needs for locating the area.



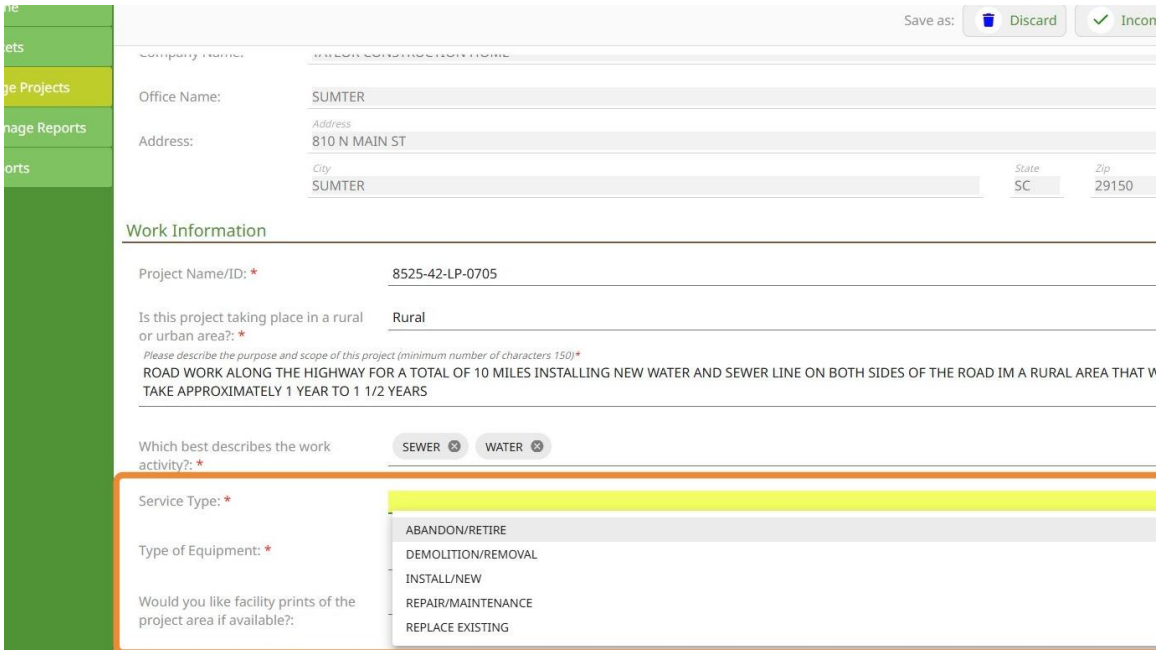
30. In the description field, provide a detailed description of the work being completed, including the scope of the project. A minimum of 150 characters is required to ensure enough detail is provided to clearly explain the full scope of the work.



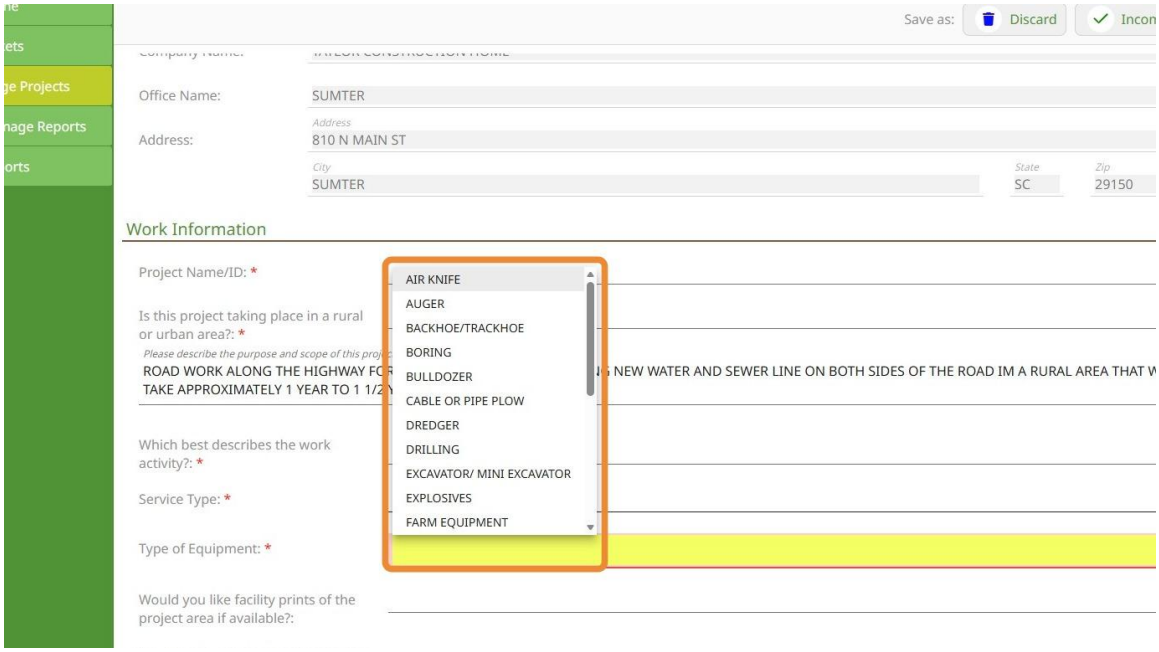
31. Select the work activity that best describes your project from the list provided. A drop-down menu will appear for you to choose from. This field does not allow free text entry, and you may select multiple work activities as needed.



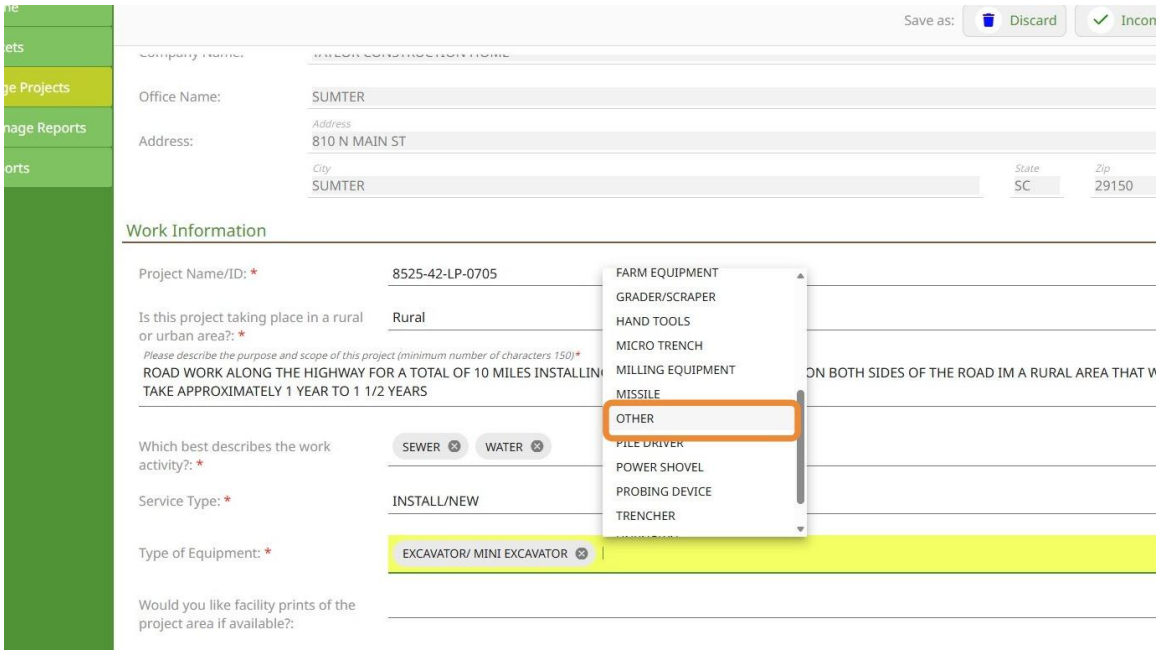
32. Next, you will click on service type and a pop up box will appear as shown below. You will need to choose from the list as you are not able to type in this field. The entire list available to choose from is shown below.



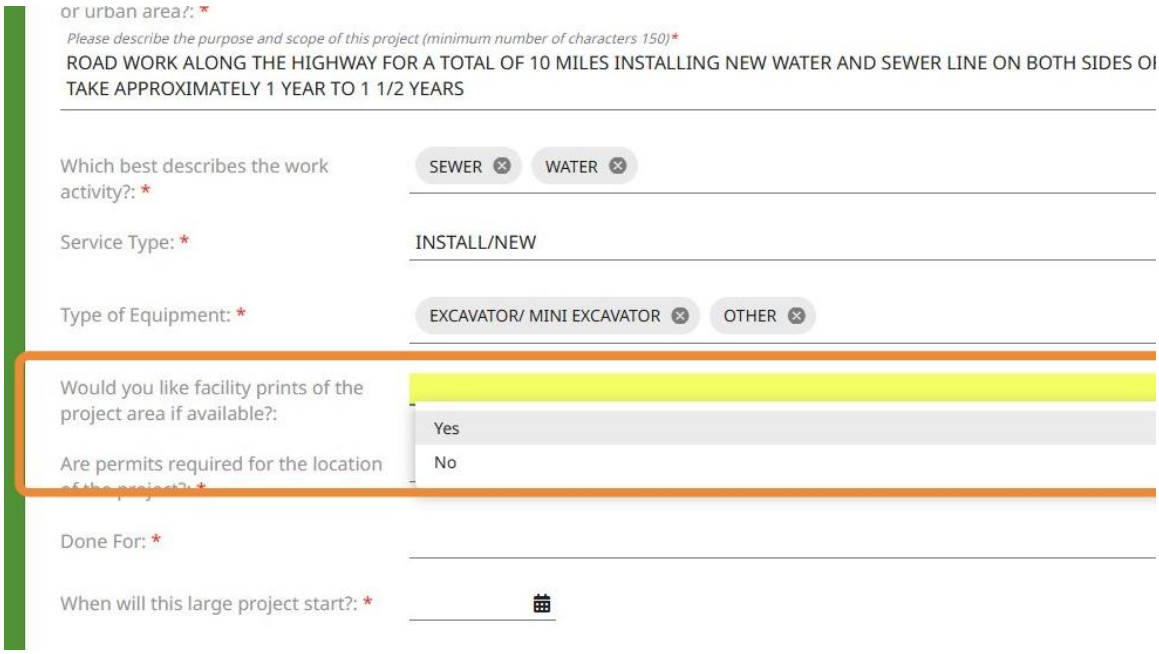
33. Next, you will choose the type of equipment that will be used. You can choose as many as you need. If drilling or boring is selected you will also need to verify which direction or both.



34. **Other** and **Unknown** can be selected.



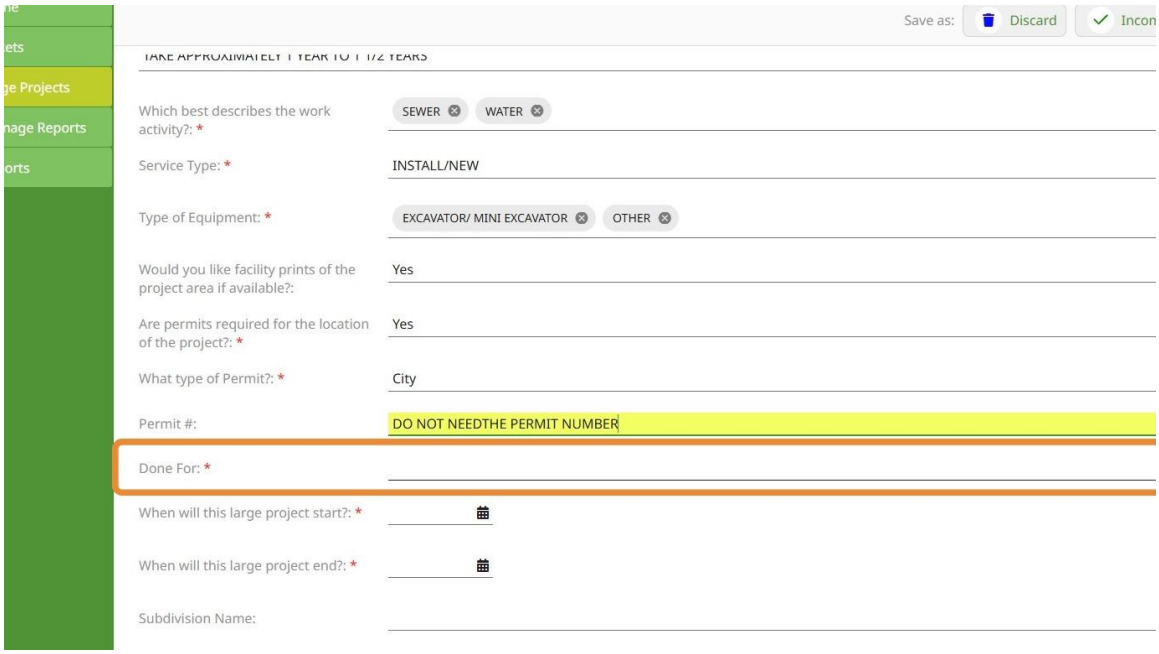
35. Select whether you would like to receive facility prints, if available. This field is optional and does not guarantee prints will be provided.



36. Indicate whether permits are required. If you select **Yes**, four permit types will appear for selection: **City**, **County**, **Private**, or **State**. If any option other than **Private** is selected, an additional field will appear to enter a permit number. Please note, the permit number is optional and may be added at a later time if it is not available during initial entry.

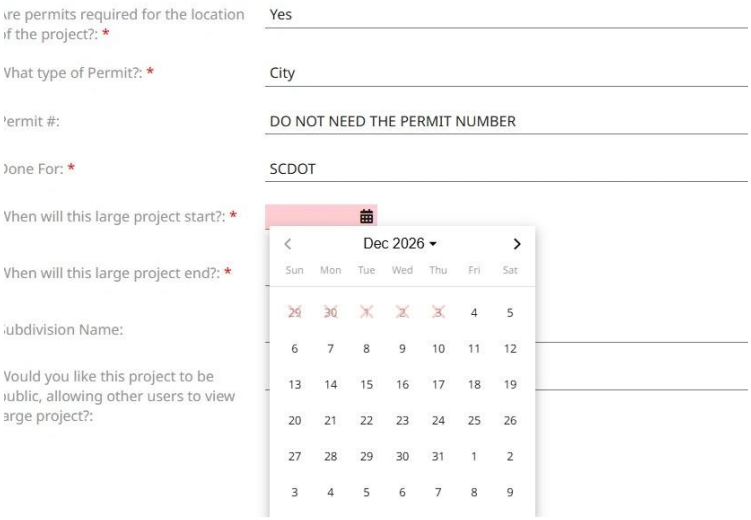


37. The **Done For** field is used to indicate the individual or organization for whom the project is being completed. You may select an option from the dropdown list or type directly into the field. Please note that generic entries such as “self” or “customer” are not valid. This is a required field and must be completed to proceed.

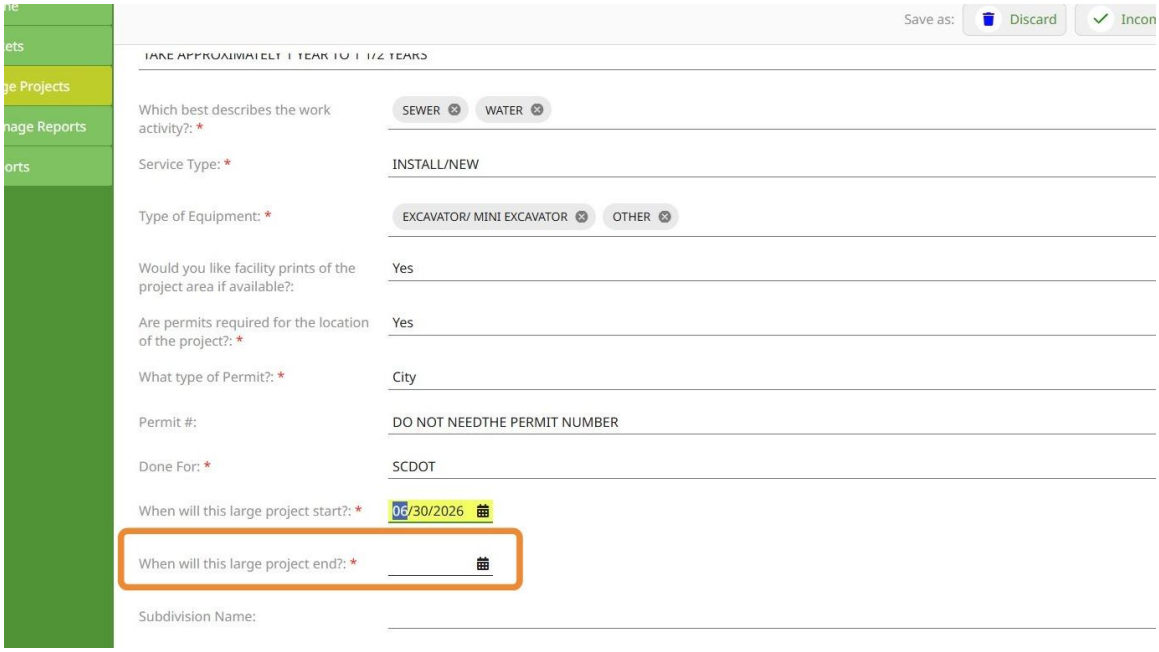


38. When entering the **Project Start Date**, you may either type the date directly into the field or select it using the calendar tool. The earliest available start date must be at least **30 days from**

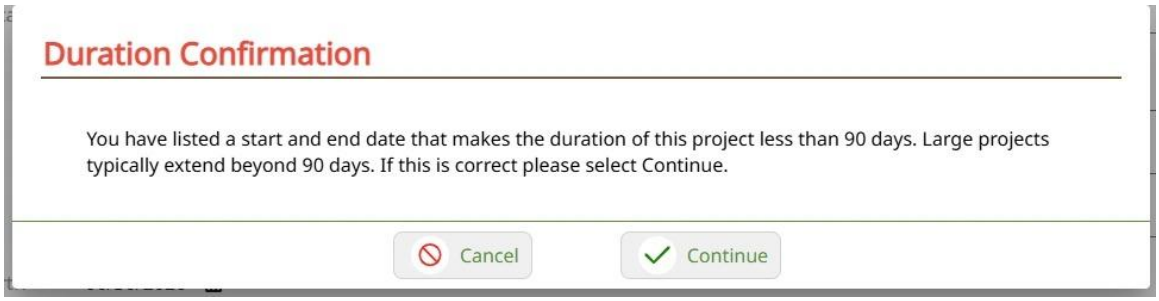
the current date.
You may select a later date if needed. Dates within the 30-day window will display a red X in the calendar and cannot be selected. The project start date determines the allowable date range for each project phase, as no phase can begin prior to the selected start date.



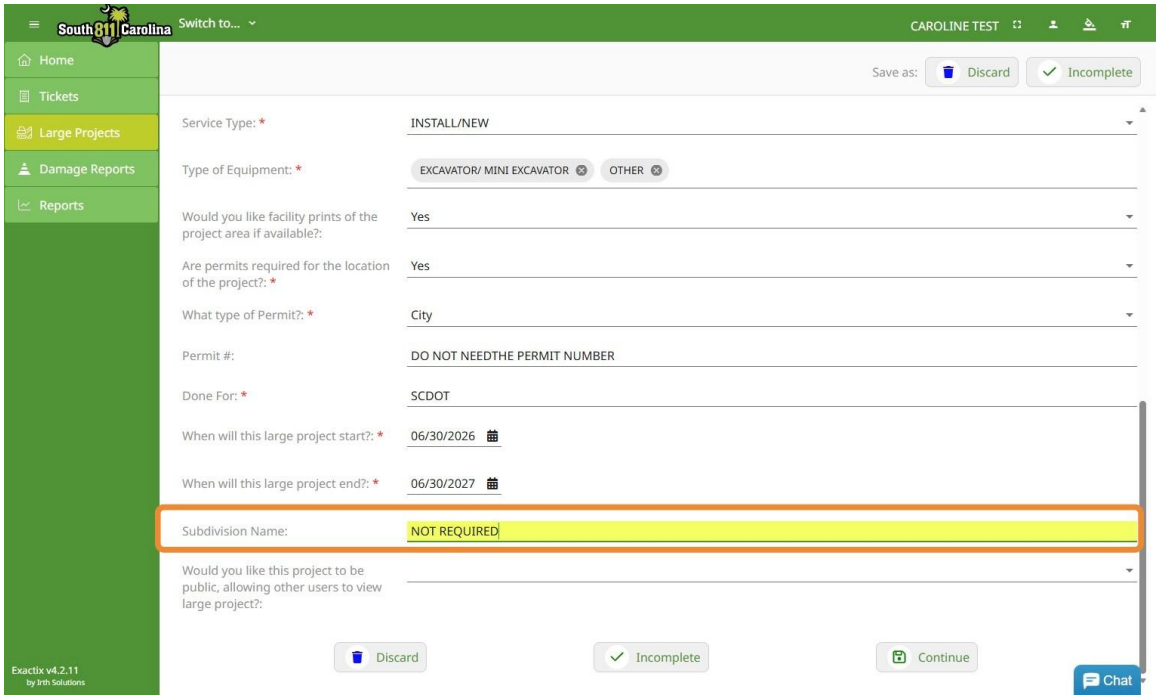
39. Next, enter the **Project End Date**, which represents your anticipated completion date for the project. This date may be updated later using the **Extend Project** feature if timelines change.



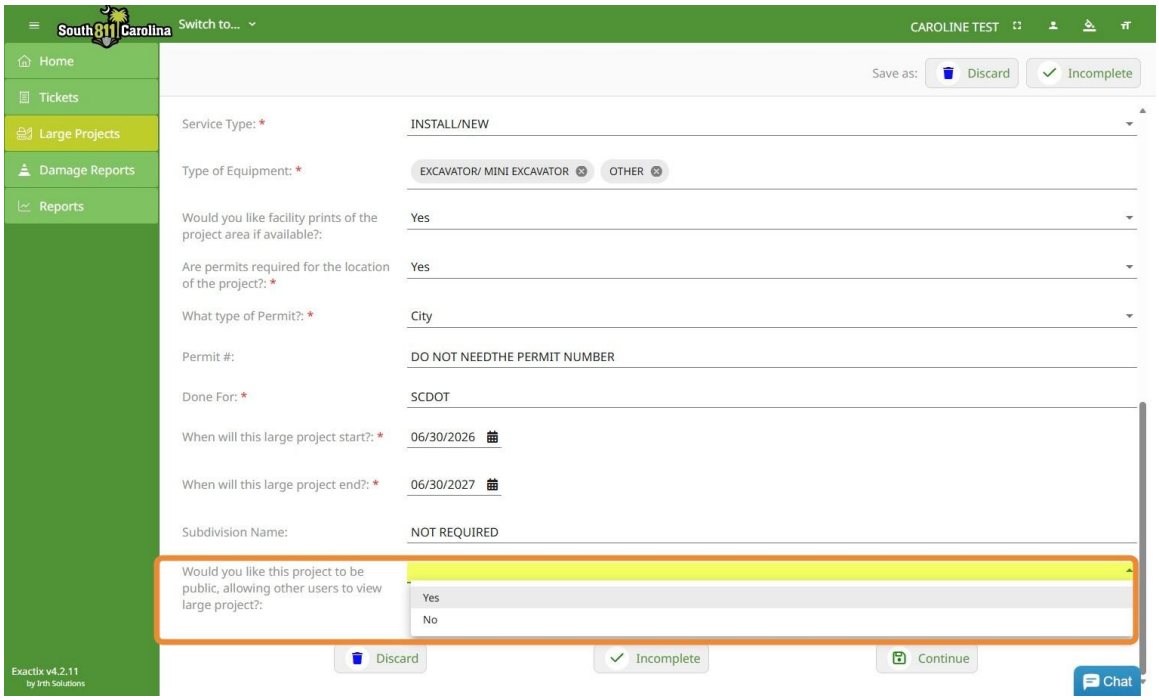
40. If the selected start and end dates are less than 90 days apart, a pop-up message will appear advising that Large Projects typically extend beyond 90 days. If the entered date range is correct, select **Continue** to proceed with processing the Large Project.



41. If the work will take place in a subdivision, you may optionally include the subdivision name. This field is not required but can help provide additional location clarity for the project.

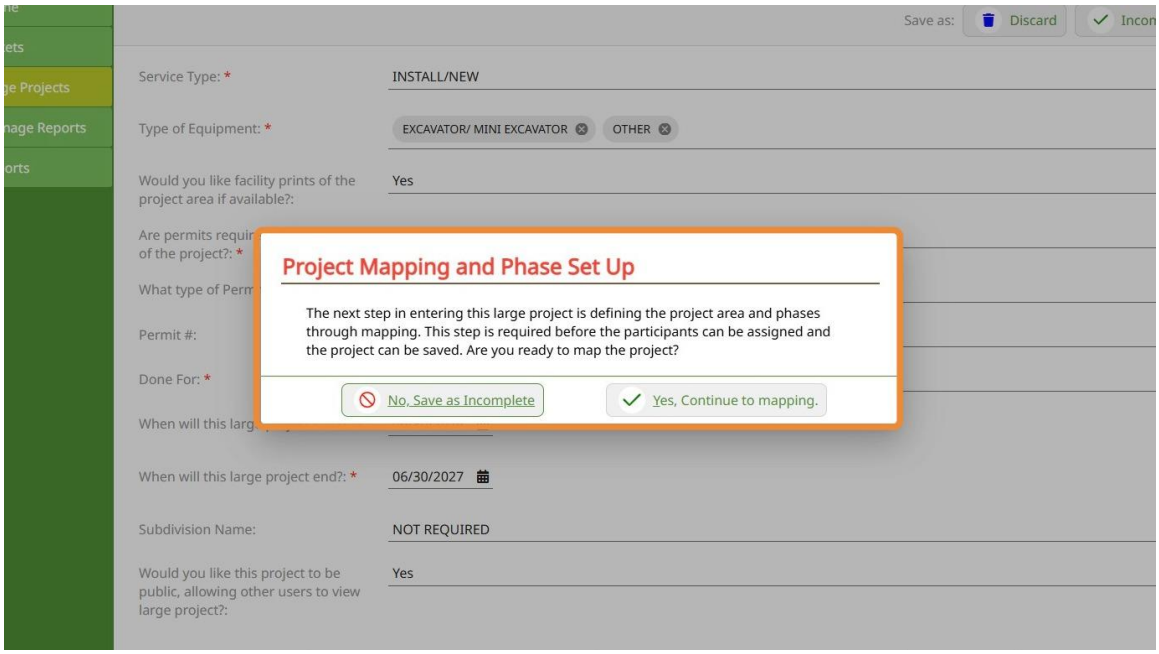


42. Next, select whether the project will be **Private** or **Public**. If **Public** is selected, project details will be visible to other authorized users within the **Public Projects** panel. While the associated Large Project tickets will not be visible, all other project information will be accessible for viewing. After making your selection, click **Continue** to proceed.



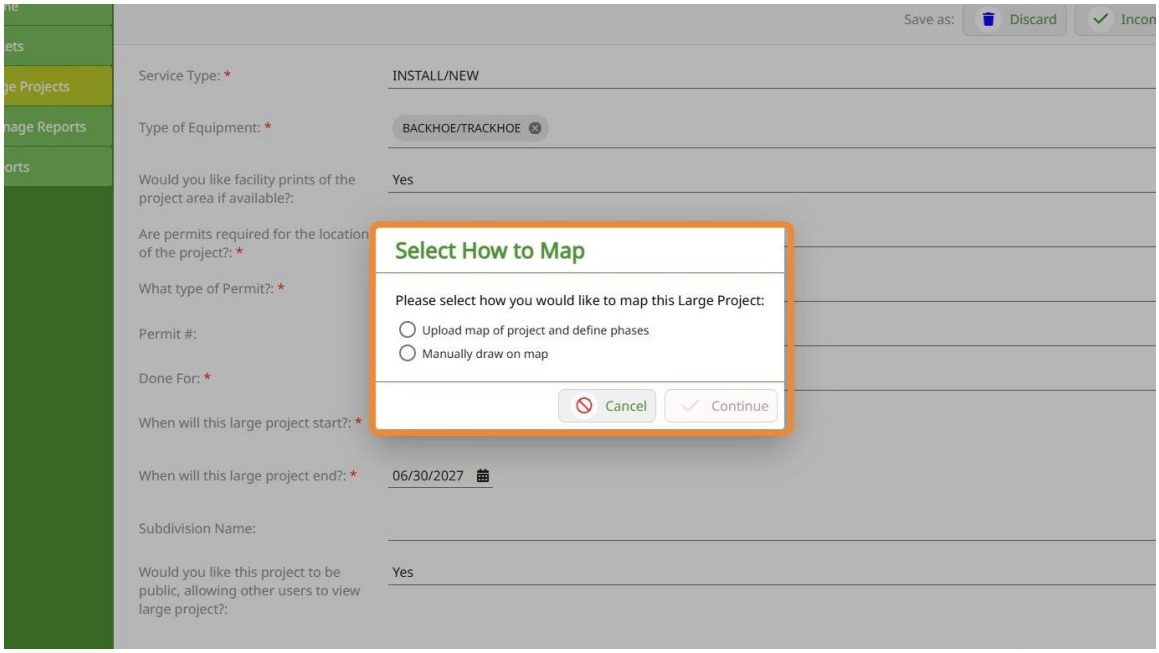
43. Once all required fields in the **Work Information** section are complete, click **Continue** in the bottom right corner of the screen. A pop-up message will appear advising that the next step is to map the project area and define phases. This step is required before participants can be assigned and before the project can be fully saved and submitted.

    If you are ready to proceed with mapping, select **Yes, Continue to Mapping** to move to the next step. If you are not ready to complete mapping at this time, select **No, Save as Incomplete** to save your progress and return to the project later.

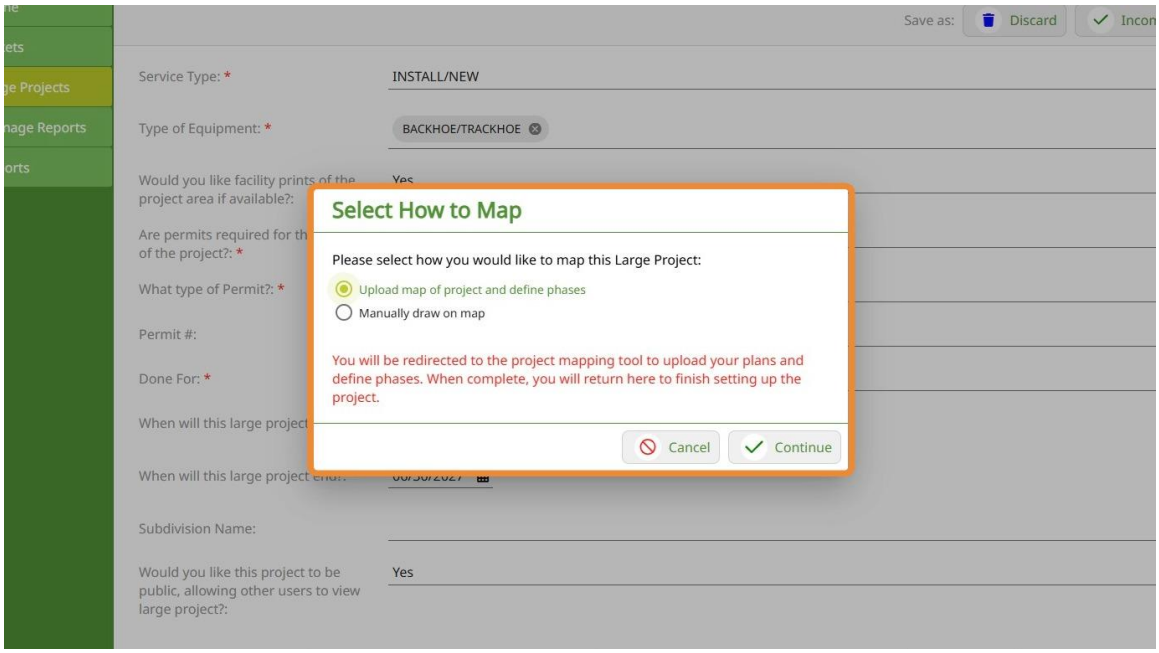


Mapping a Project Geo Importer

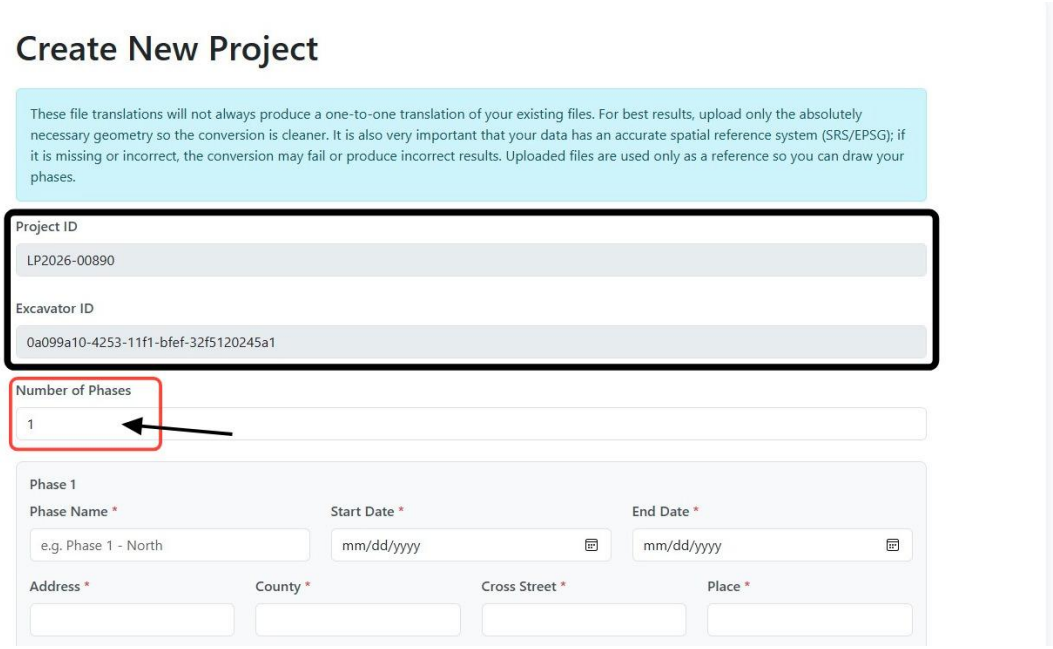
44. After selecting **“Yes, Continue to Mapping,”** the **“Select How to Map”** pop-up will appear. This window gives you two options: upload a map of the project and define phases, or manually draw the project area on the map.
    We’ll start with the first option, **“Upload map of project and define phases.”**
    Uploading a map allows files such as **KMZ**, **GeoJSON**, and **Shape Files** to be layered onto the map as a reference when drawing and defining project phases.



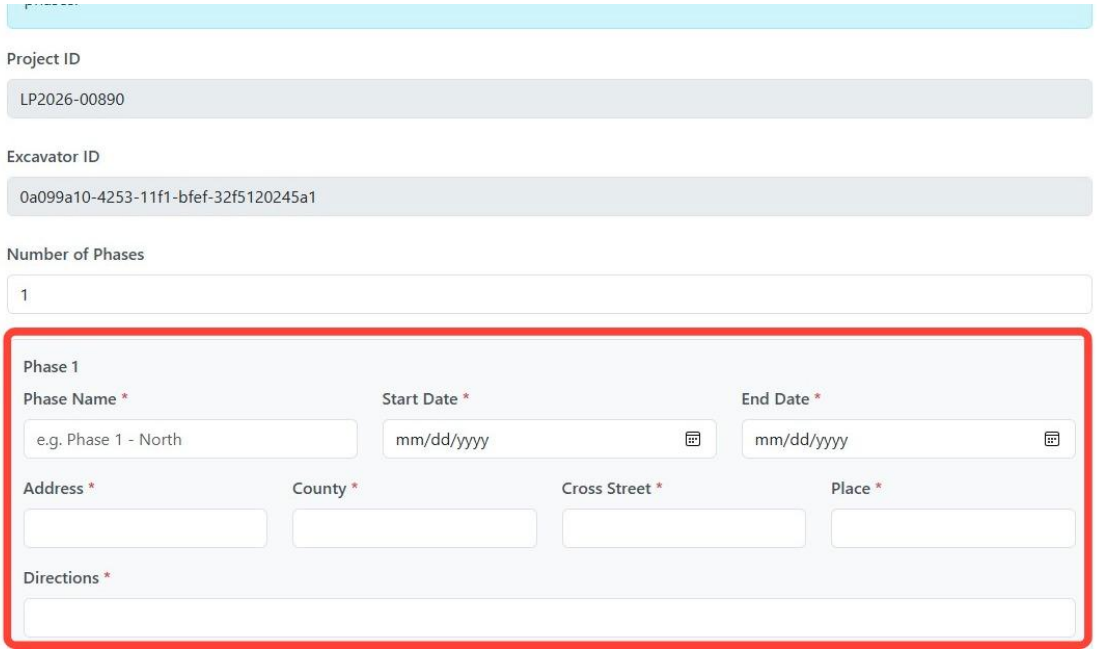
45. To upload a map, select **Upload Map of Project and Define Phases**, then click **Continue** to proceed.



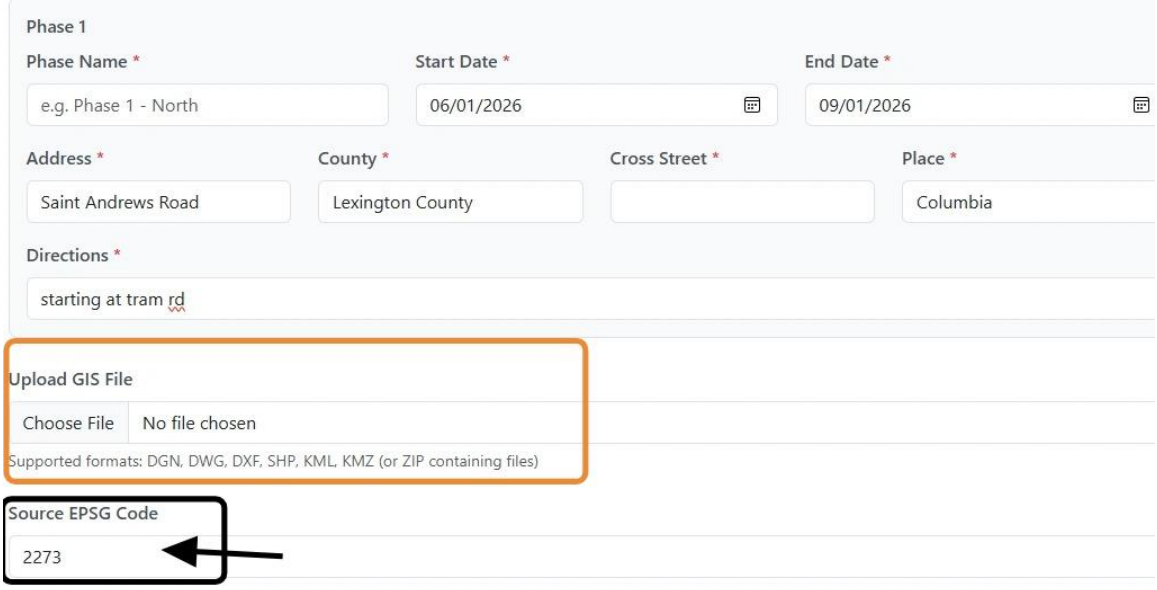
46. Selecting this option opens the **Geo Importer** in a separate view. Once the upload process is complete, you will automatically return to the Large Project request.
    At the top of the form, an informational message explains that uploaded files may not produce a one-to-one match when translated into the mapping system. For best results, only essential project geometry should be included in the uploaded file. The message also advises that files must contain the correct spatial reference system to ensure accurate map placement.
    Uploaded files are used only as a visual reference during mapping, and all project phases must still be finalized using the mapping tools within Exactix.
    Next, enter your project phase information, including the phase name and location details. The **Project ID** and **Excavator ID** fields will automatically populate from the project information previously entered. All required fields are marked with a red asterisk (*).
    The **Project ID** and **Excavator ID** fields are system-generated and cannot be modified.
    If your project includes multiple phases, enter the total number of phases for the project in the designated field.



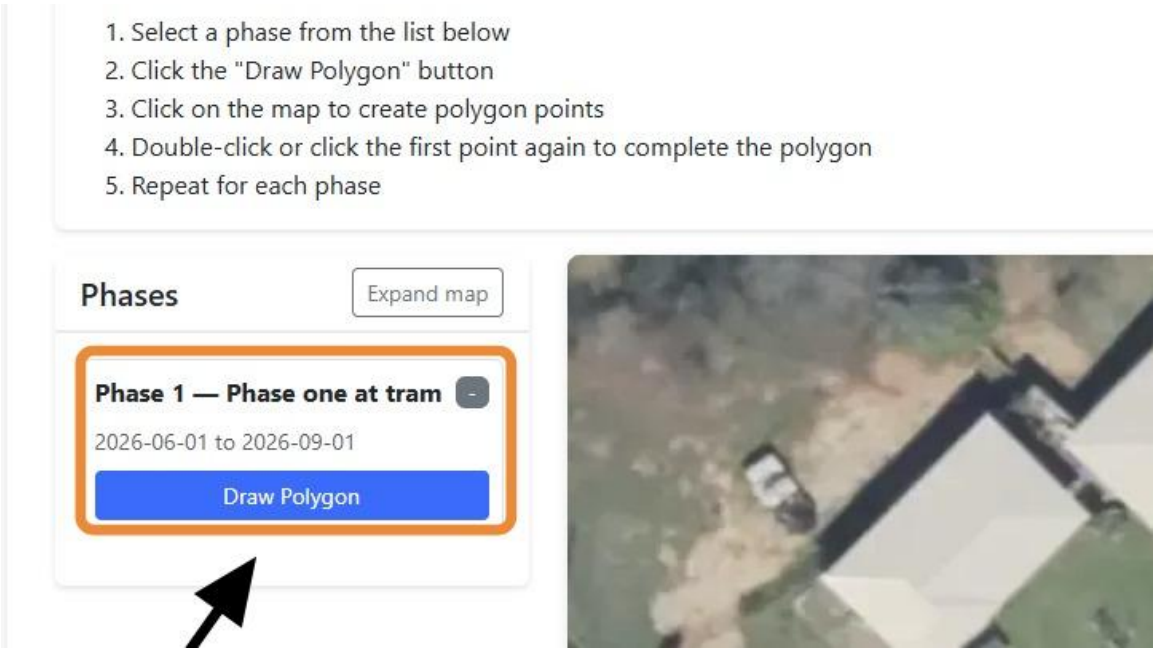
47. In this section, enter the phase details, including the **Phase Name**, **Start and End Dates**, and the location where work will take place, such as the **city, county, cross streets, and any additional directions for the phase area**. This process will be repeated for each additional phase entered into the project.
    Phases should be organized into clear and manageable sections, as each phase generates its own locate ticket. Properly structuring phases helps excavators and Member Operators coordinate work activities and maintain accurate utility markings throughout the project.
    Phases are not required to follow a strict order or timeline. Multiple phases may be active simultaneously and can overlap depending on how work is being performed in the field. Phases should be divided based on how the excavation work will actually be completed rather than solely on project scheduling.



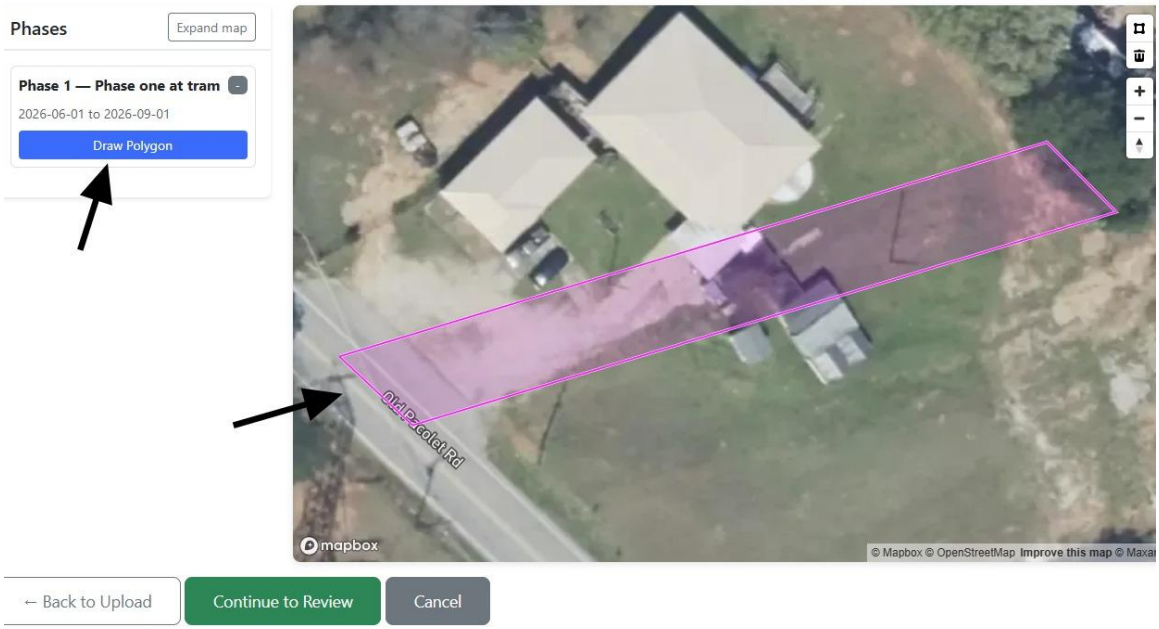
48. The next section allows you to upload a GIS file for the project area. Exactix uses this file to help identify the location on the SC811 map before you outline it using the mapping tools. Supported file formats are listed directly on the form.
    The final field is the **Source EPSG Code**, which is used to identify the coordinate system of the uploaded GIS file. This is typically only adjusted if the file was created in a different coordinate system to ensure it aligns correctly on the map. For most projects, the default setting is sufficient and does not need to be changed.



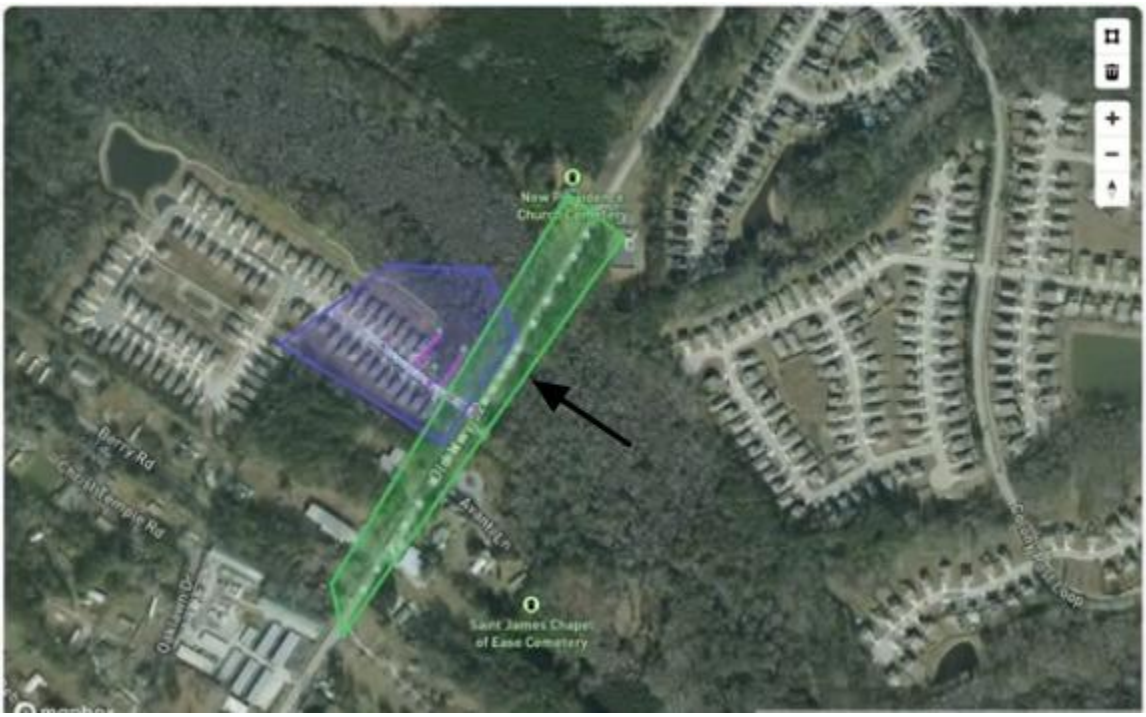
49. After all required fields are complete, select **Continue to Map** at the bottom of the form to move into the mapping interface.
    Once your imported map has loaded, your project phases will appear in a list on the left side of the screen. You can then begin outlining the phase area on the map using the **Draw Polygon** tool.



50. Start by selecting the blue **Draw Polygon** button under Phase 1.



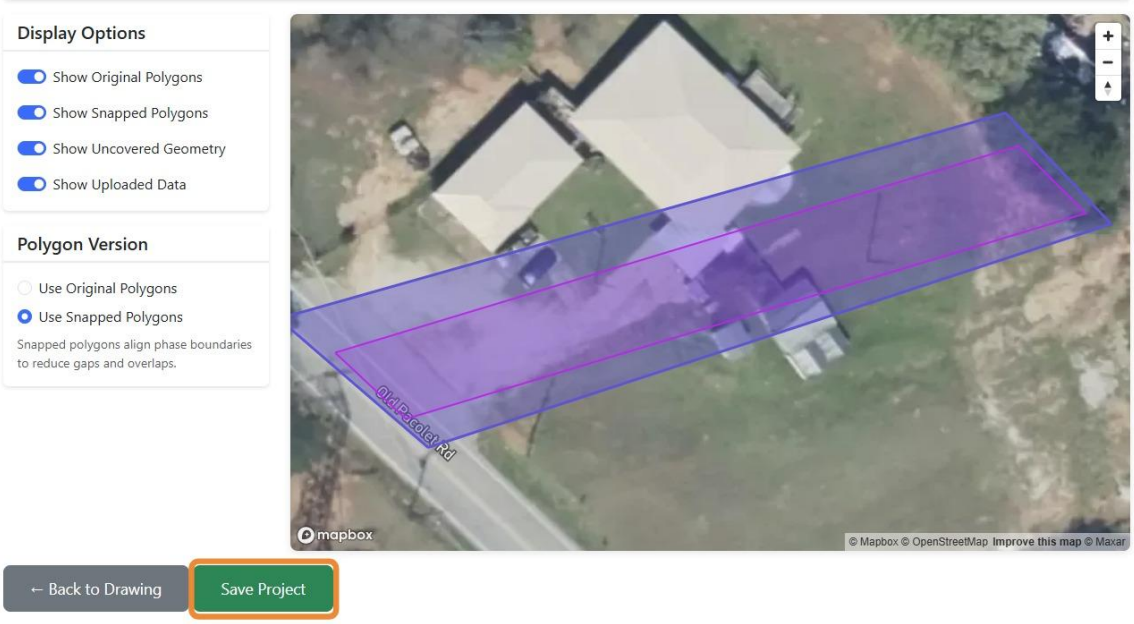
51. Then click on the map to trace the boundary of the work area, following the imported map. Continue placing points around the area, and double-click to close the shape when finished. After Phase 1 is complete, repeat the same steps for Phase 2 by selecting **Draw Polygon** under that phase and mapping its area. If additional phases are included, repeat these steps for each one. Each polygon represents a specific work area and helps define where ticket activity will take place.



52. If the phases you have drawn do not fully cover the area outlined in the uploaded drawing, the system will display an alert indicating that uncovered geometry has been detected. Select **Zoom to Feature Parts** to highlight and review the uncovered areas to determine whether the phase boundaries need to be adjusted. If the mapping is correct as entered, you may proceed without making changes.



53. When you are finished mapping and reviewing the project phases, click **Save Project** to return to Exactix.



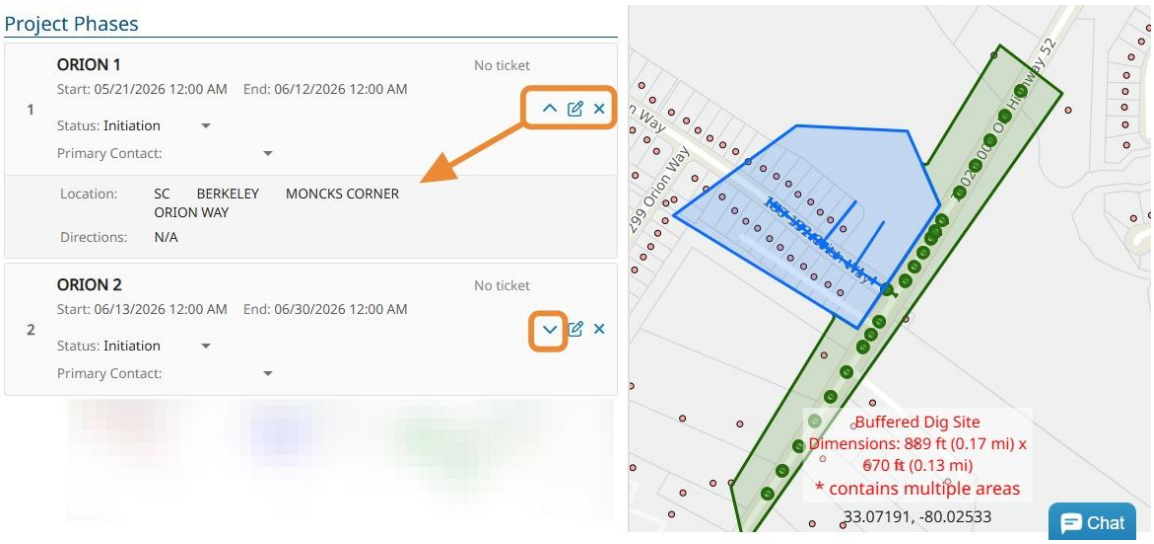
54. After saving, you will be redirected back to Exactix and taken to the **Phases** section of the Large Project request. Under the **Project Phases** section, you will see the phase information entered

through the Geo Importer.

To view additional details for a phase, click the arrow next to the phase name. This will expand the phase information, including the start and end dates, address details, and directions entered for the phase area.

To make changes to a phase, select **Edit** next to the applicable phase. Update the information in the fields at the top of the page, then select **Update Phase** to save your changes or **Discard Changes** to cancel without saving.

Once all phases have been reviewed and no additional changes or phases are needed, click **Continue** to proceed to the **Contacts** section.

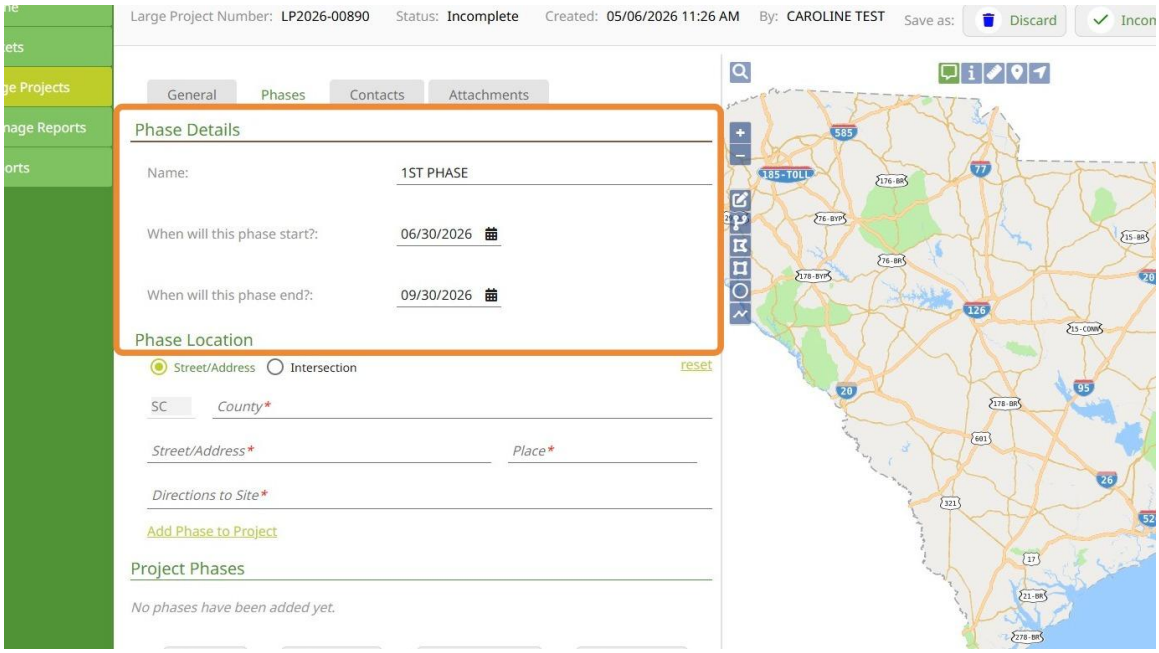


Mapping a Project - Manually Draw On Map

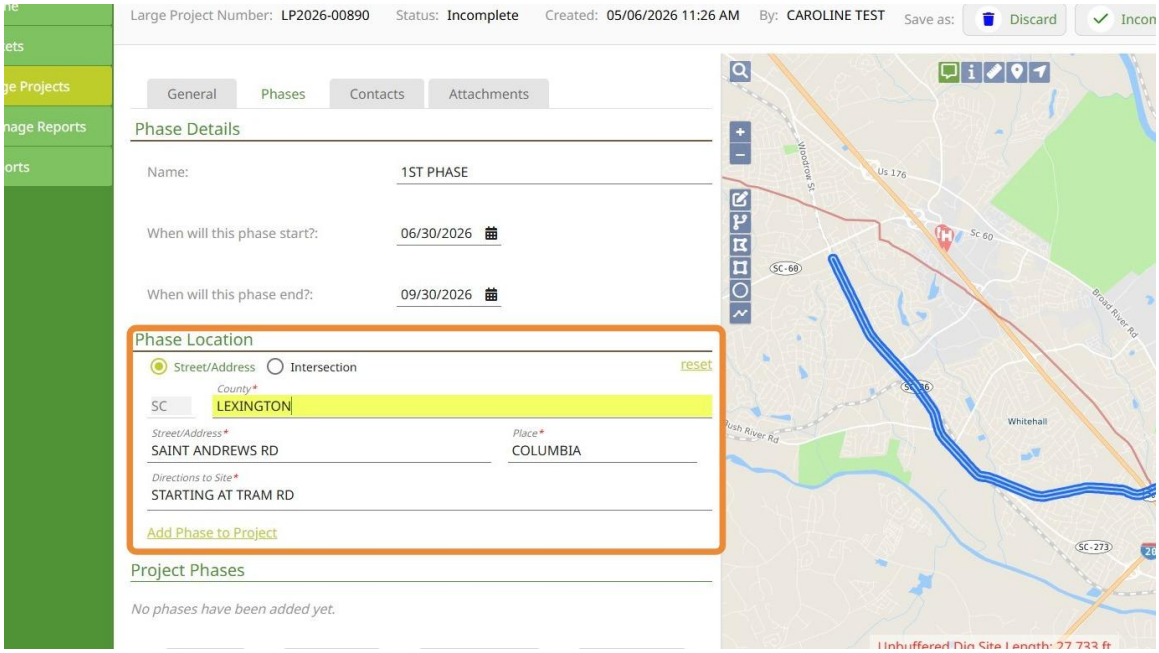
55. Before continuing to the next steps of entering a Large Project, let's review how to create phases using the **Manually Draw on Map** option. Select **Manually Draw on Map**, then click **Continue** to proceed.



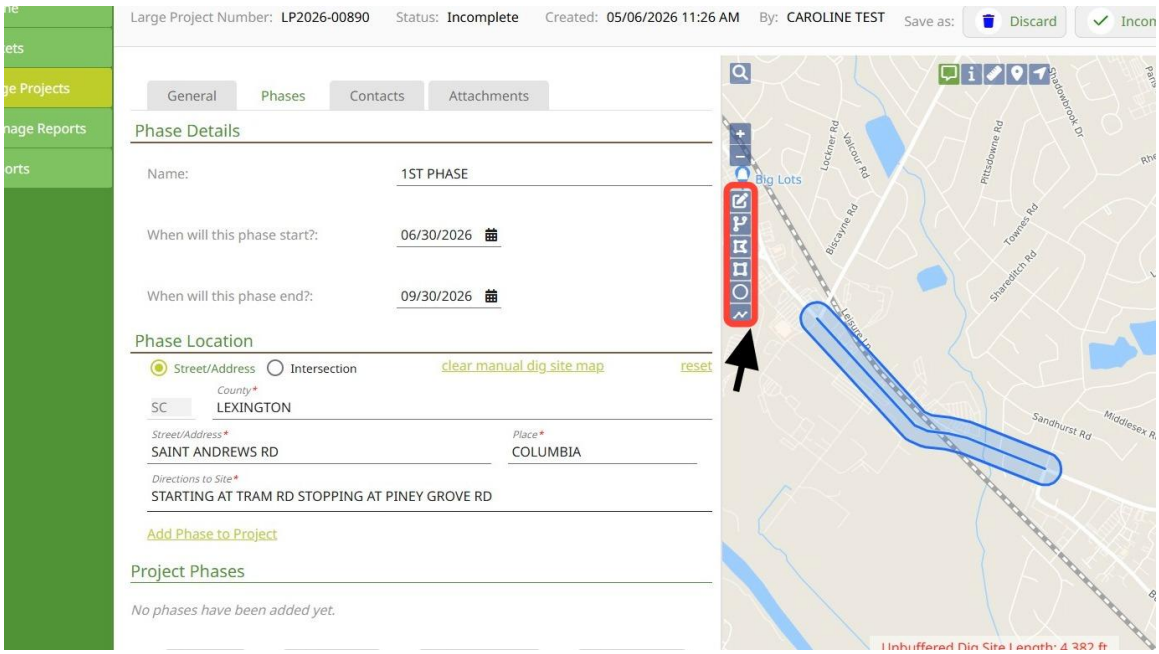
56. Complete the phase details by entering a **Phase Name** along with the **Start Date** and **End Date** for the phase.
    Each phase name must be unique within the Large Project and cannot be reused for another phase in the same project. Phase dates must fall within the overall project start and end dates entered earlier in the project creation process.



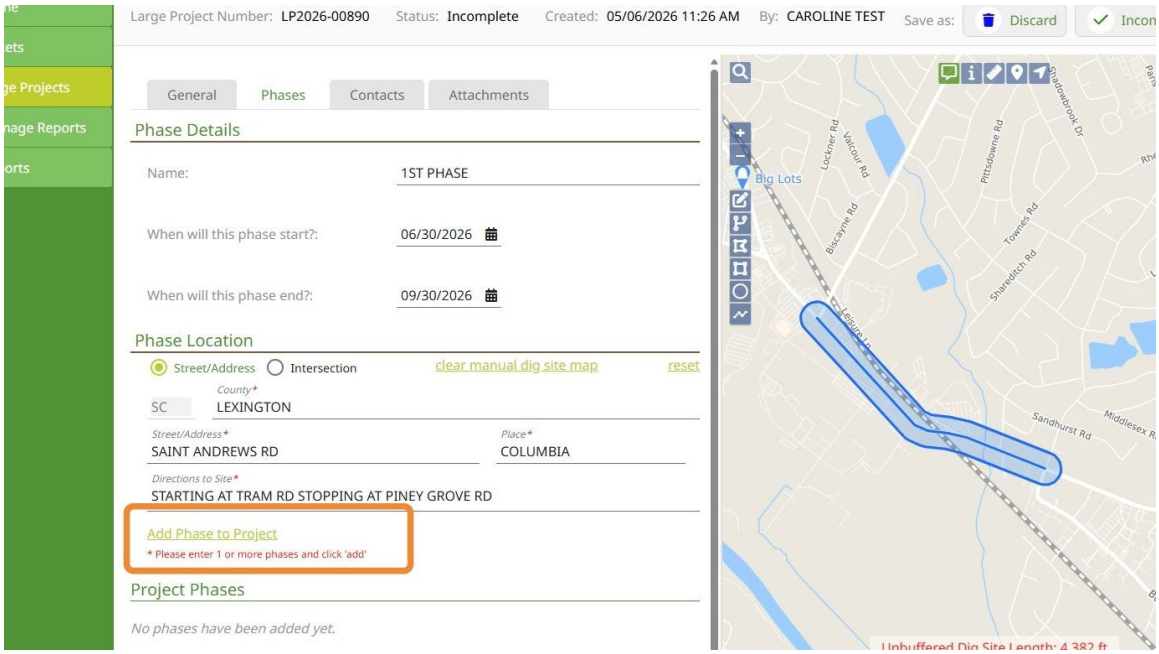
57. Next, enter the **Phase Location** by providing the street or address where the work will take place, along with the applicable **county** and **place**. A free-text field is also available to include directions to the location or any other relevant details.
    This information will be carried over to the ticket created for the phase once it is generated. While the 1,320-foot requirement does not apply to Large Projects, keeping phase areas small and manageable is encouraged to improve coordination and maintain clear utility marking throughout the project.



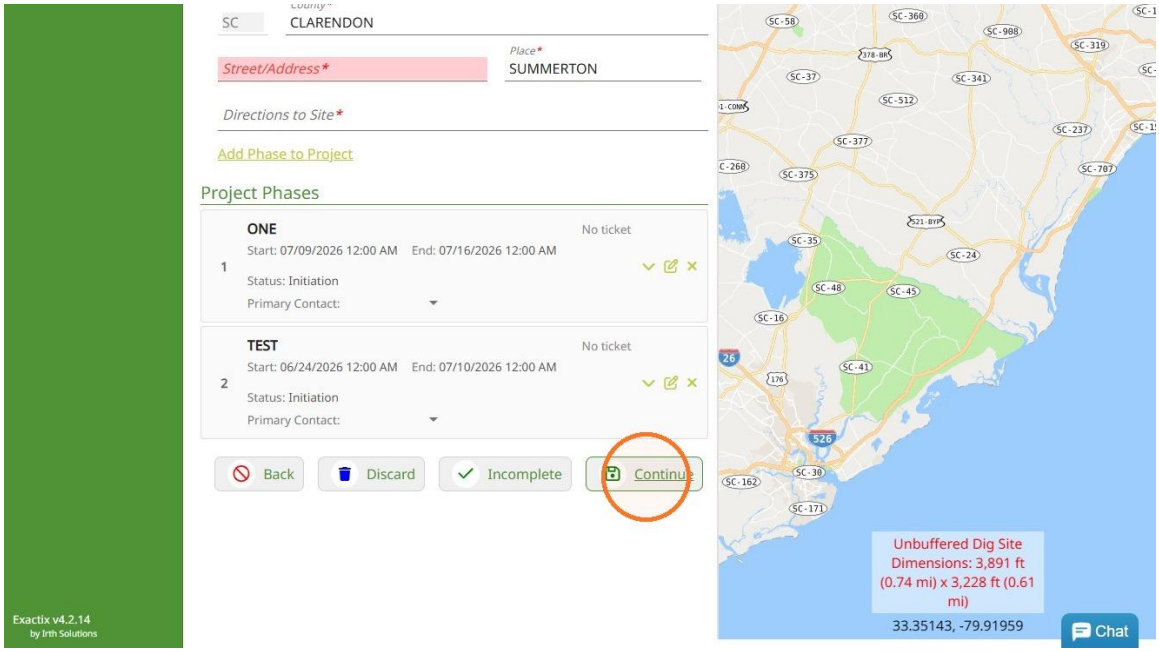
58. Next, use the mapping tools on the left side of the map to draw the phase area, similar to how you would when entering a standard ticket. Ensure the entire phase area is fully covered by the blue shaded boundary. Once complete, click to save the drawing.



59. When finished, click the **Add Phase to Project** button. The phase will then appear in the **Project Phases** section below. Repeat this process to add as many phases as needed for the project.

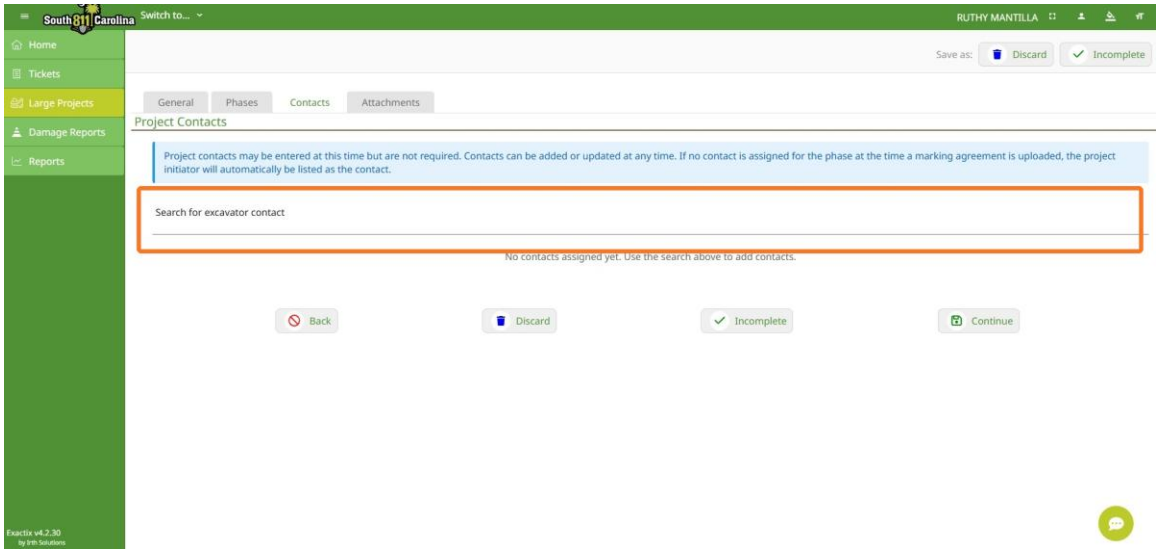


60. Once all phases have been added, click **Continue** at the bottom of the page to proceed.

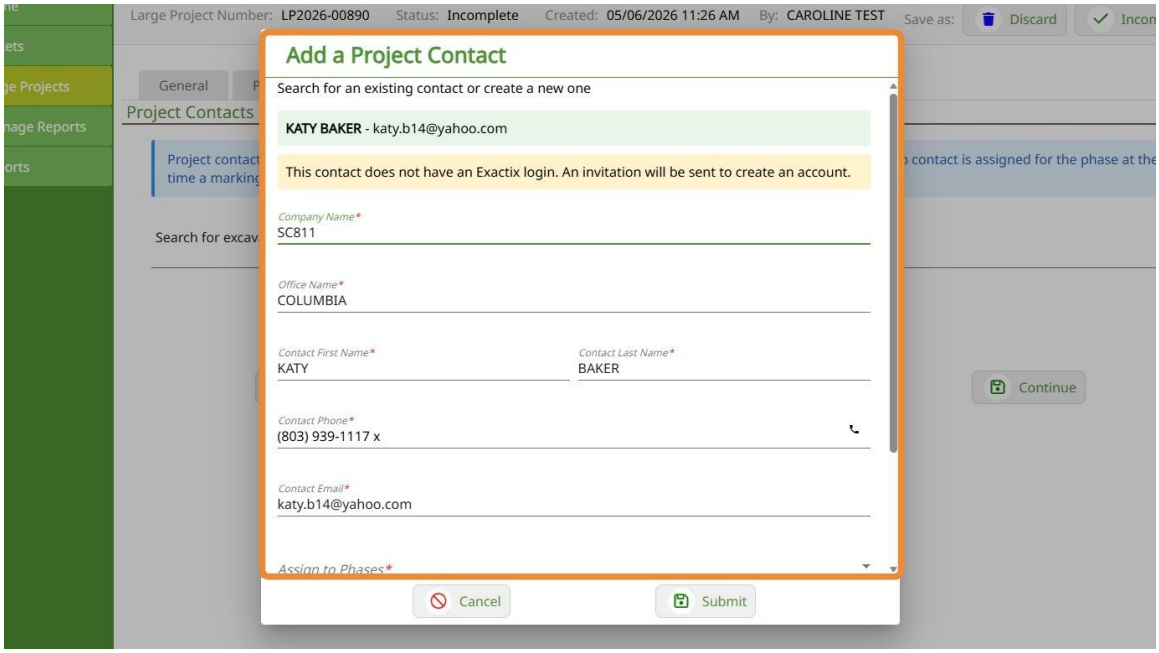


Adding Contacts to a Project

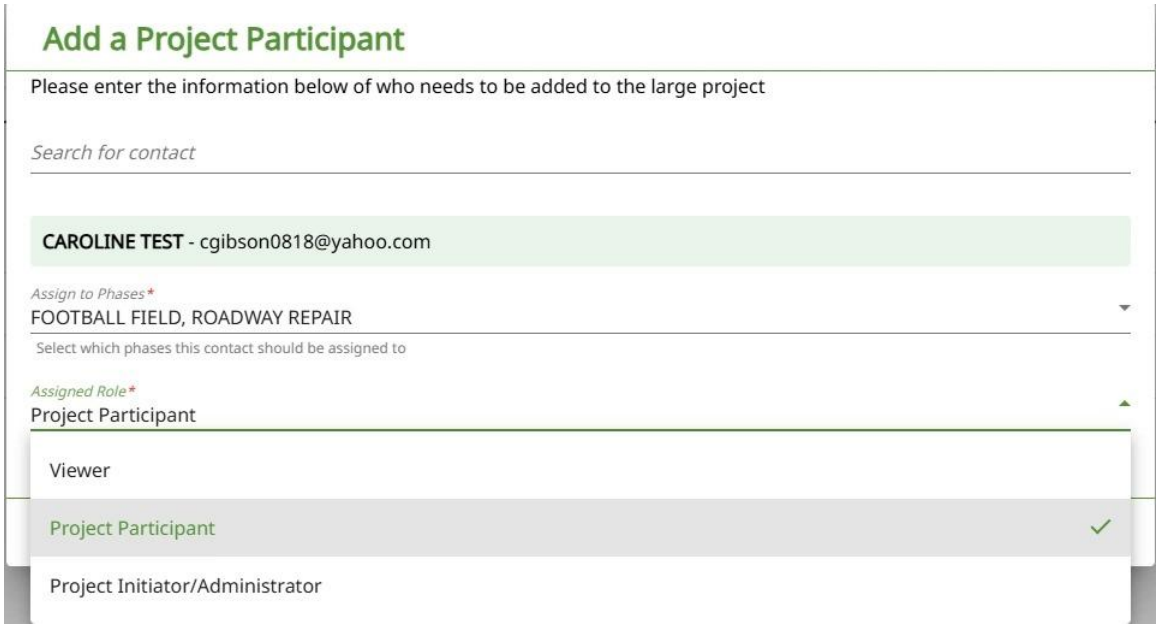
61. Next is **Contacts**. Contacts may be added at any point during the life of a Large Project. If you have contacts available at the time of creation, you may add them now; otherwise, you can return to this section later to update or include contact information as needed. To add contacts and their role, click on search for contacts.



62. When adding a **Project Contact**, you can first search to see if the contact already exists in Exactix. If an existing contact is found, their information will automatically populate.
    If the contact is not found in the system, they will need to be added as a new contact. A system invitation will be sent to them to join at the end of the process. To add a new contact, you will need their **email address, first and last name, company name, city/office name, and phone number**.
    Once added, you will assign the contact to the appropriate phase as outlined in the following steps.

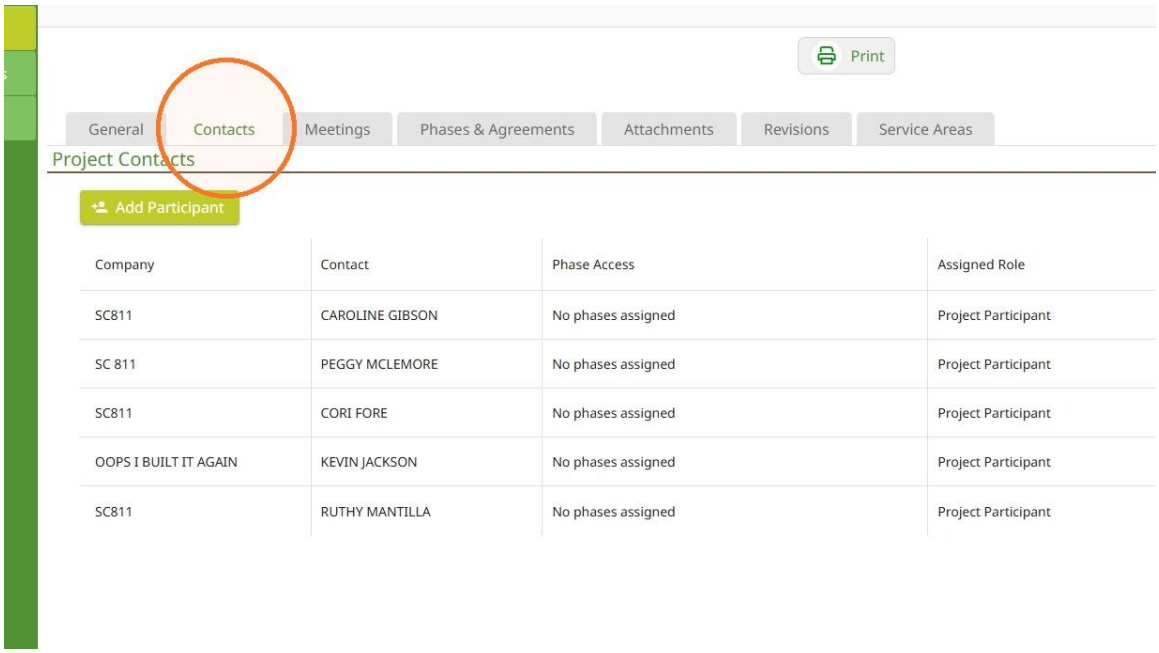


63. After the contact is added, assign them to the appropriate phase by selecting the phase from the dropdown. You may choose one, multiple, or all phases.
    Next, select the appropriate role for the contact. Keep in mind that **Viewers** have read-only access and cannot take any actions on the project. **Project Participants** can perform most project-related actions, and **Project Administrators** have full access and typically serve as the primary point of contact for project-related questions.

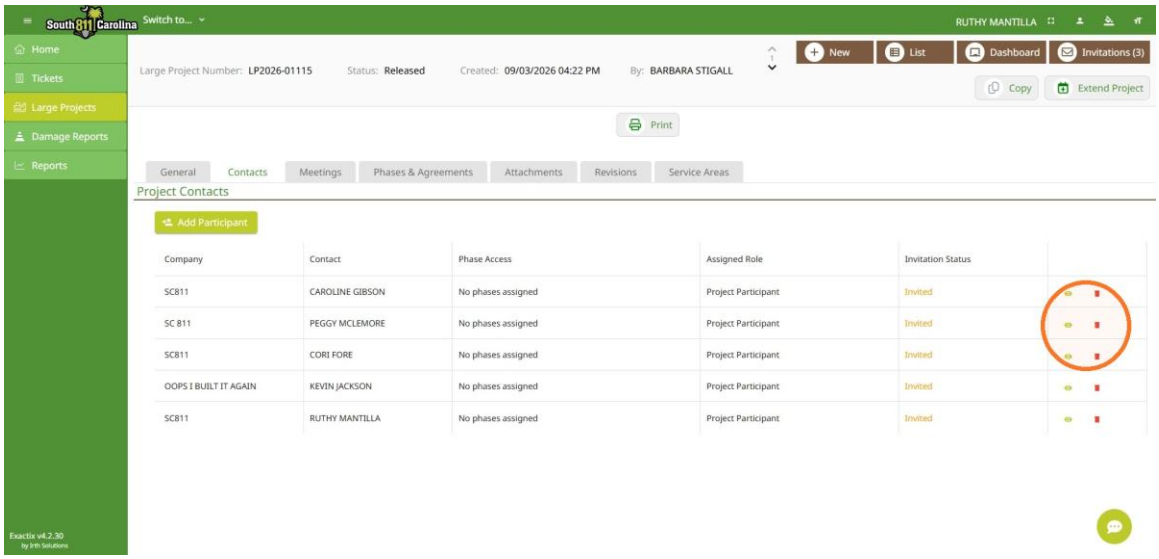


Contacts and Project Participants will only be able to view the phase or phases that they have been added to. They will not be able to see all phases of the project if they are not a Contact or Participant of any other phases within the project.

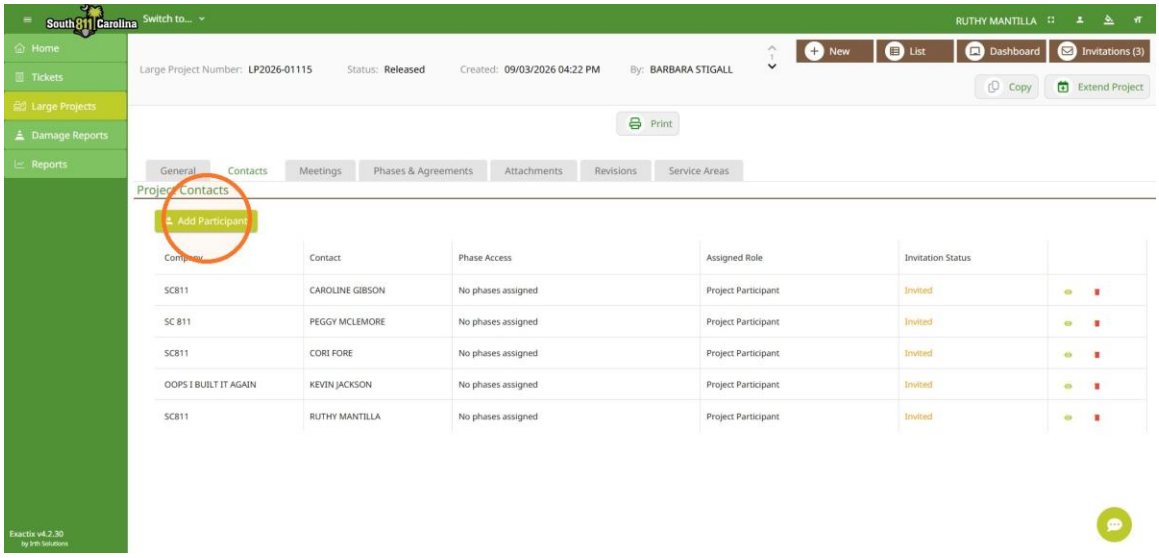
64. **Managing Project Contacts**
    Project contacts can be added or removed at any time after the project has been submitted. To manage the contacts, open the project and navigate to the Contacts tab.
    From the Contacts tab, you can select Add Participants to add a new contact or remove an existing contact as needed. **You do not need to select the Edit button to make changes to the project contacts.**
    When adding a participant, be sure to select the correct contact and company. The contact will receive access to the project, so it is important that they are associated with the correct company and are aware that they have been added to the project.



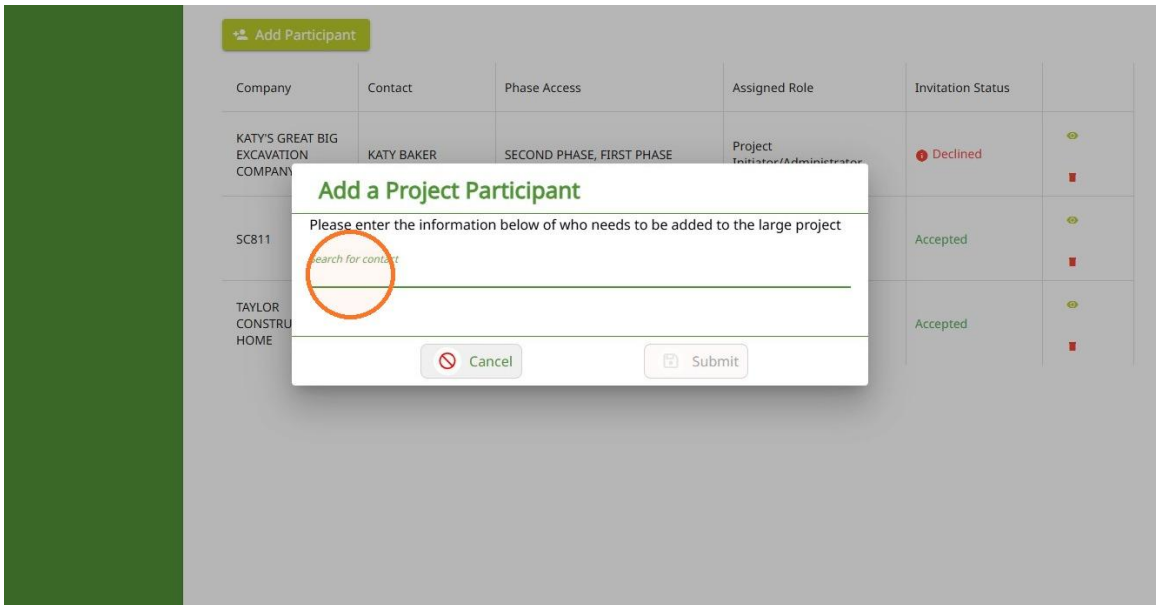
65. Within the **Contacts** tab, contact information can be viewed or managed as needed. To take action on a contact, select the **View** or **Delete** icon located to the far left of the contact entry.



66. To add a contact, click the **Add Participant** button. Keep in mind that contacts will appear as subcontractors on the corresponding tickets for any phases to which they are assigned.

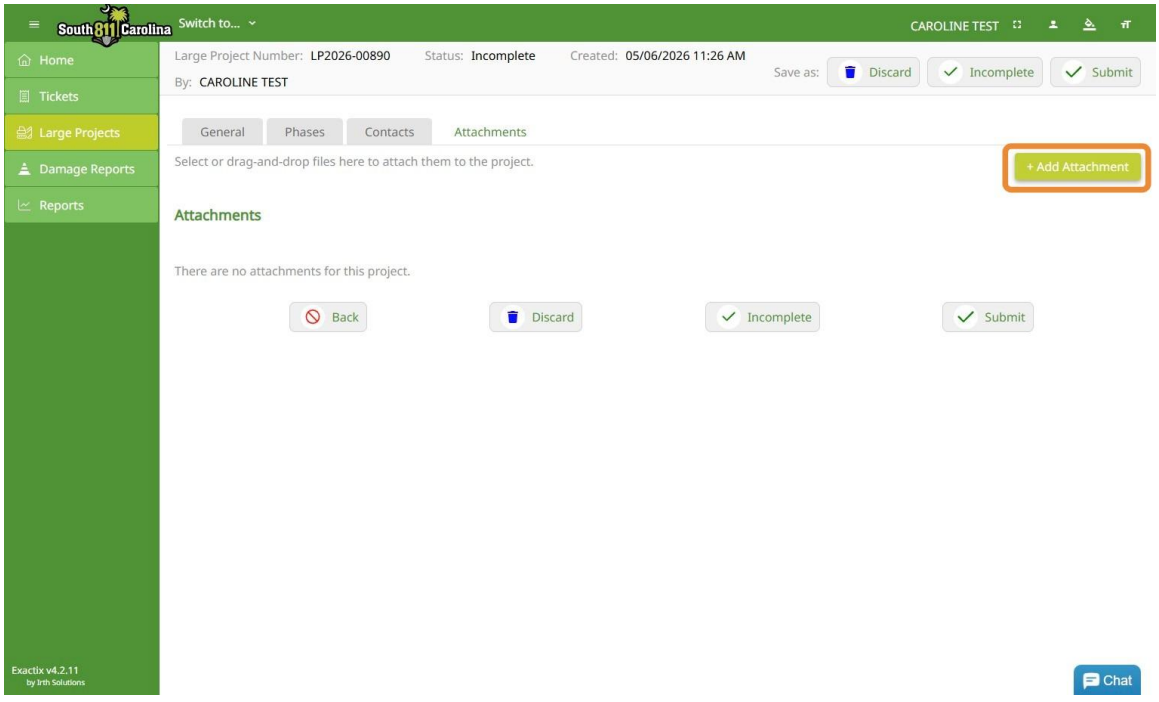


67. Add or create the contact you wish to include, entering the required information if the contact does not already exist in the system.

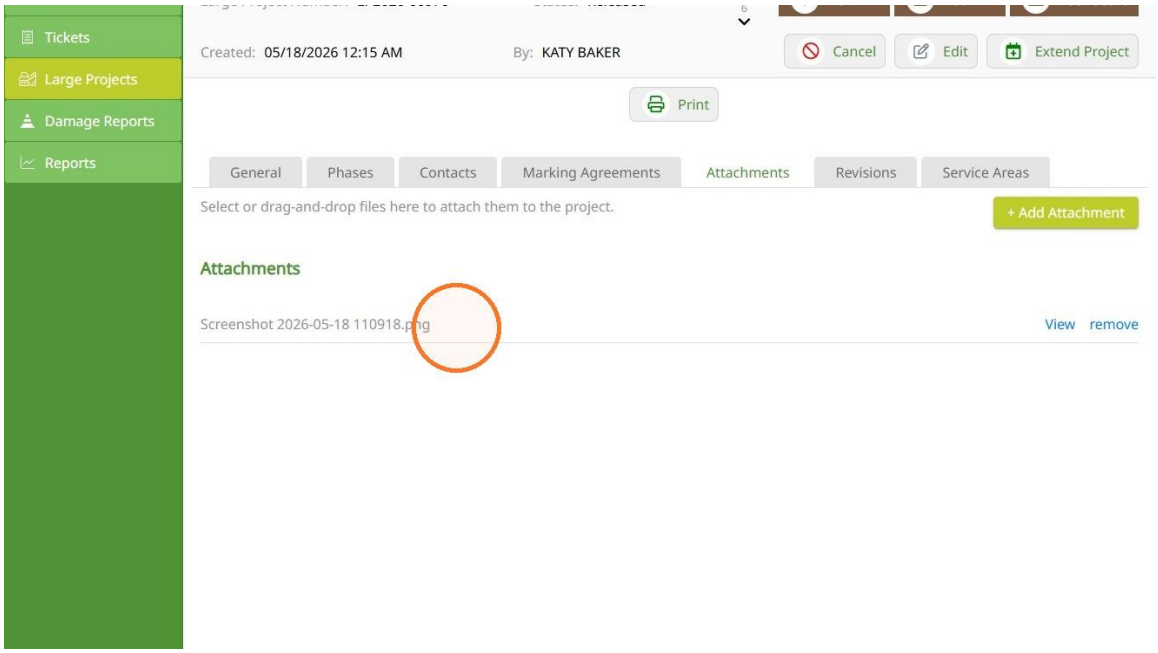


Adding Attachments and Submitting the Project

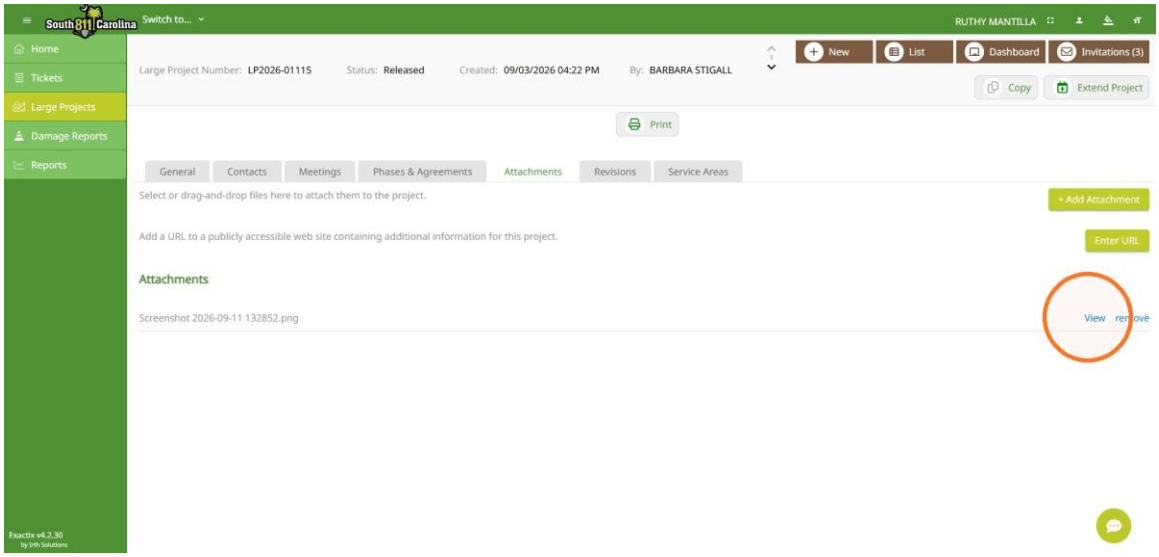
68. The final screen for project entry is the **Attachments** section. Attachments, like contacts, can be added at any time during the life of the project. To add an attachment, click the **+ Add Attachment** button and select the file you wish to upload.



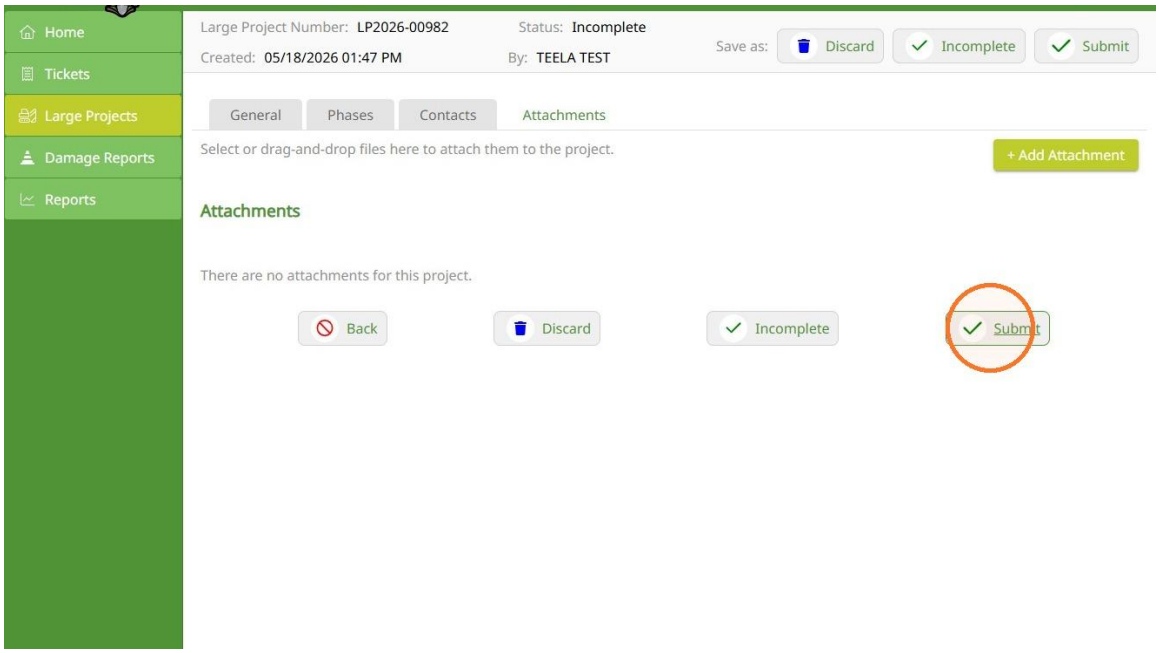
69. Uploaded attachments will appear in a list within the Attachments section, where they can be reviewed as needed.



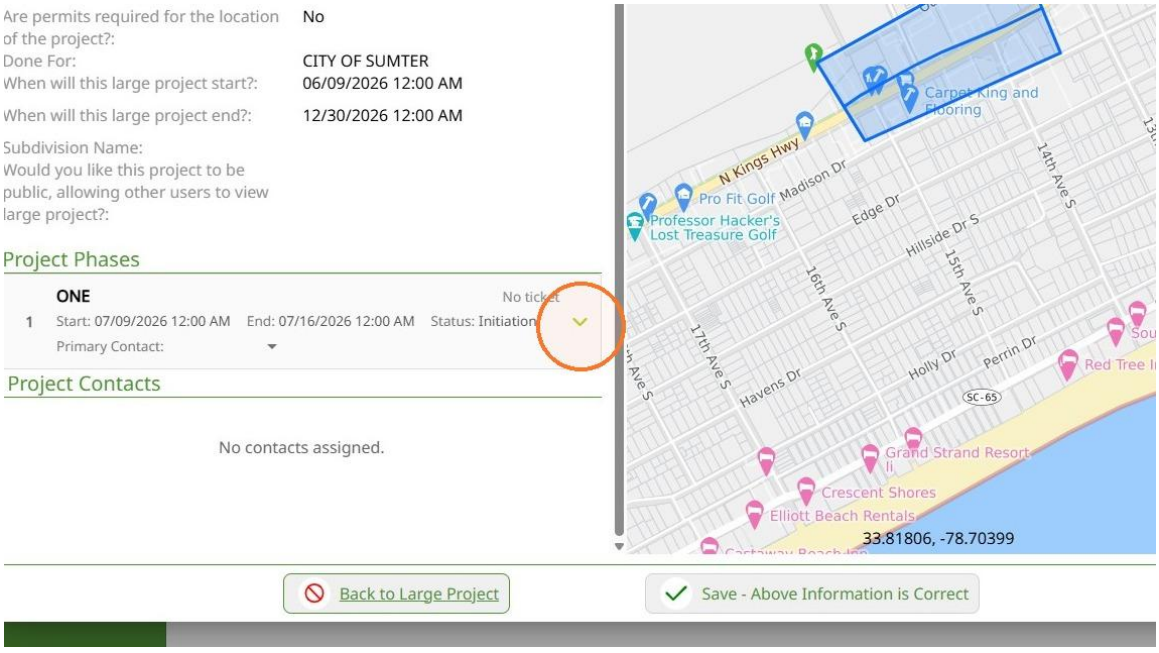
70. To manage attachments, use the available options next to each file to either view or remove the attachment as needed.



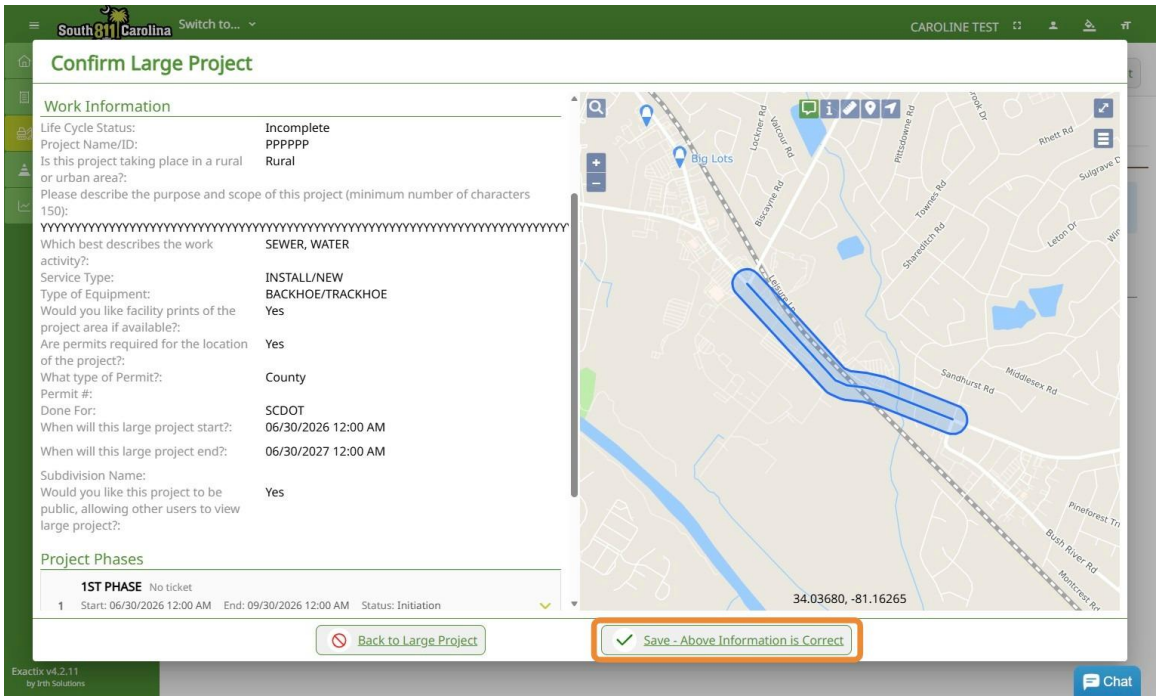
71. When all required information has been entered and reviewed, click **Submit** to submit the project.



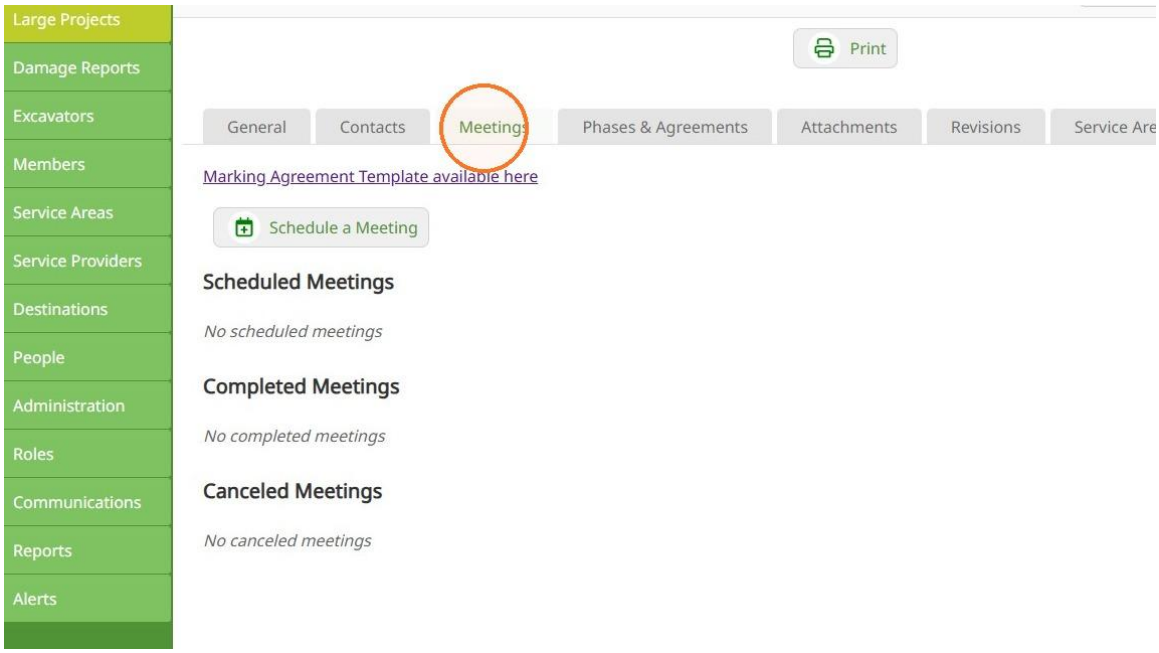
72. A verification screen will appear, allowing you to review the entire project before final submission. Each phase can be expanded to view full details. Carefully review all information to ensure accuracy before proceeding.



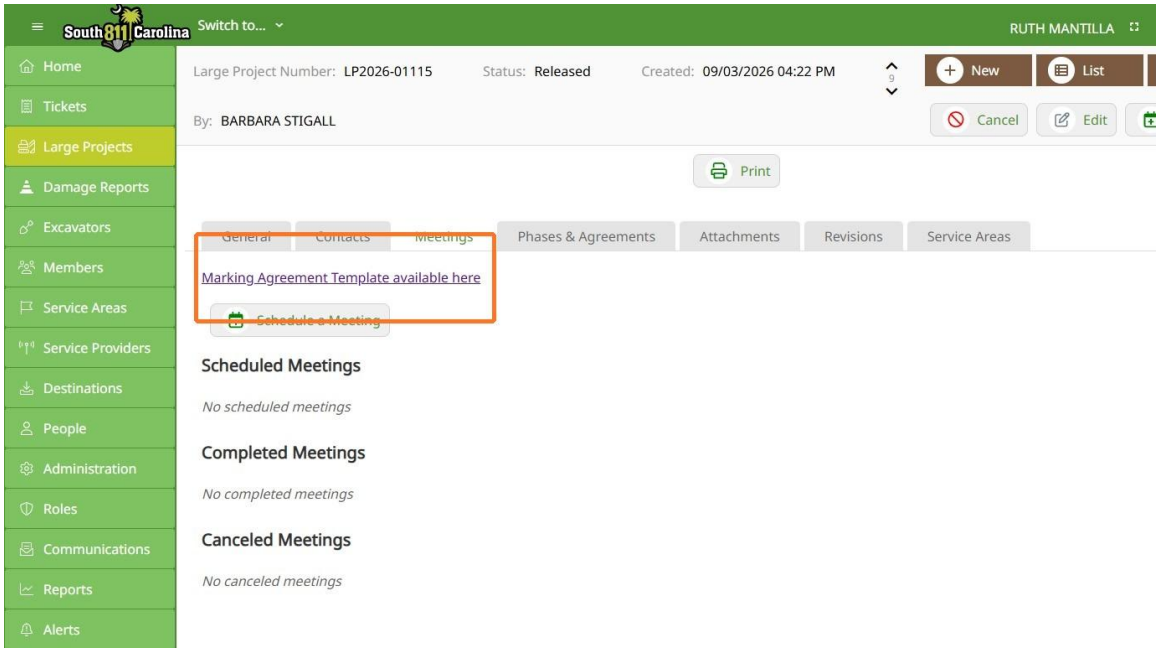
73. To finalize submission, click **Save – Above Information is Correct**.


South 811 Carolina
Switch to...
CAROLINE TEST
Confirm Large Project
Work Information
Life Cycle Status: Incomplete
Project Name/ID: PPPPPP
Is this project taking place in a rural or urban area?: Rural
Please describe the purpose and scope of this project (minimum number of characters 150):
YYYY

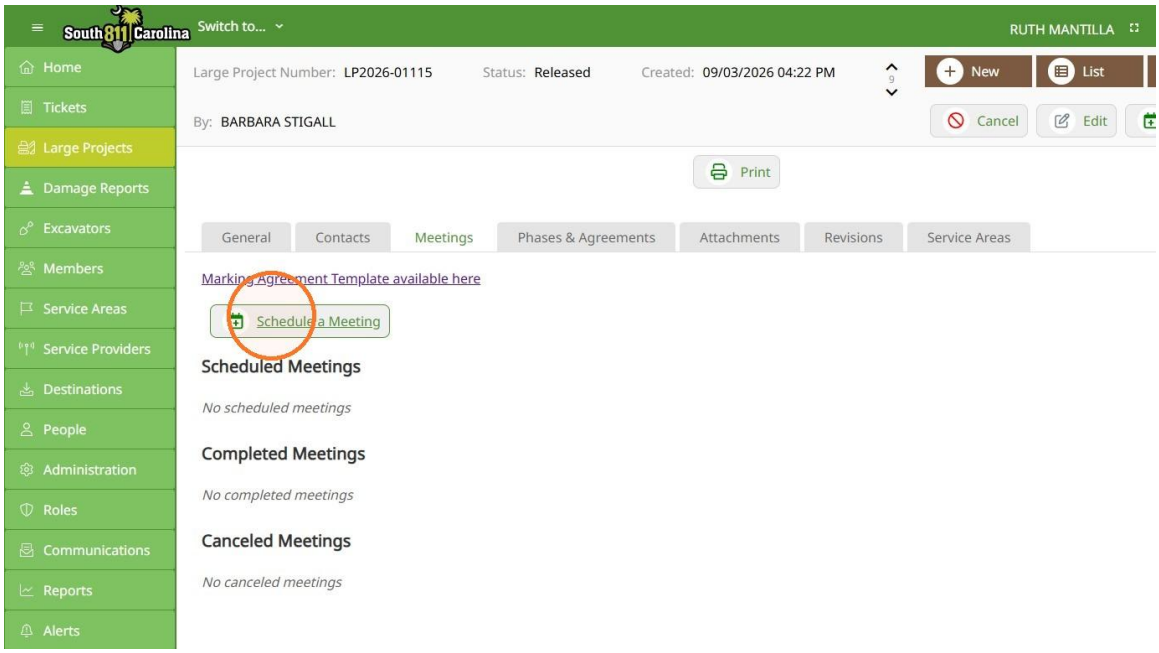
This will allow locators to access Large Project details directly from the meet tickets.
A Planning Meeting may be scheduled as early as **three working days after the project is entered**, with the day the project is entered counting as **Day 1**.
To schedule a meeting, navigate to the **Meetings** tab within the project and select **Schedule Planning Meeting** in the upper-left corner of the screen.



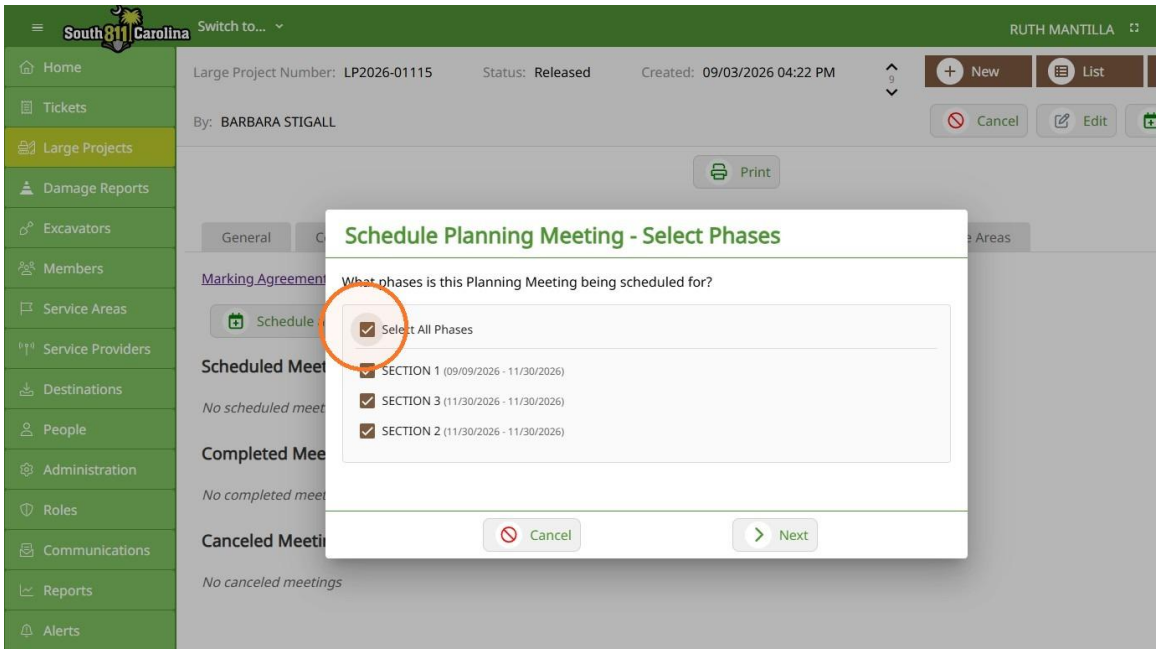
76. On the Meetings tab, you can click "Marking Agreement Template available here" to review/use the optional template when conducting your planning meeting.



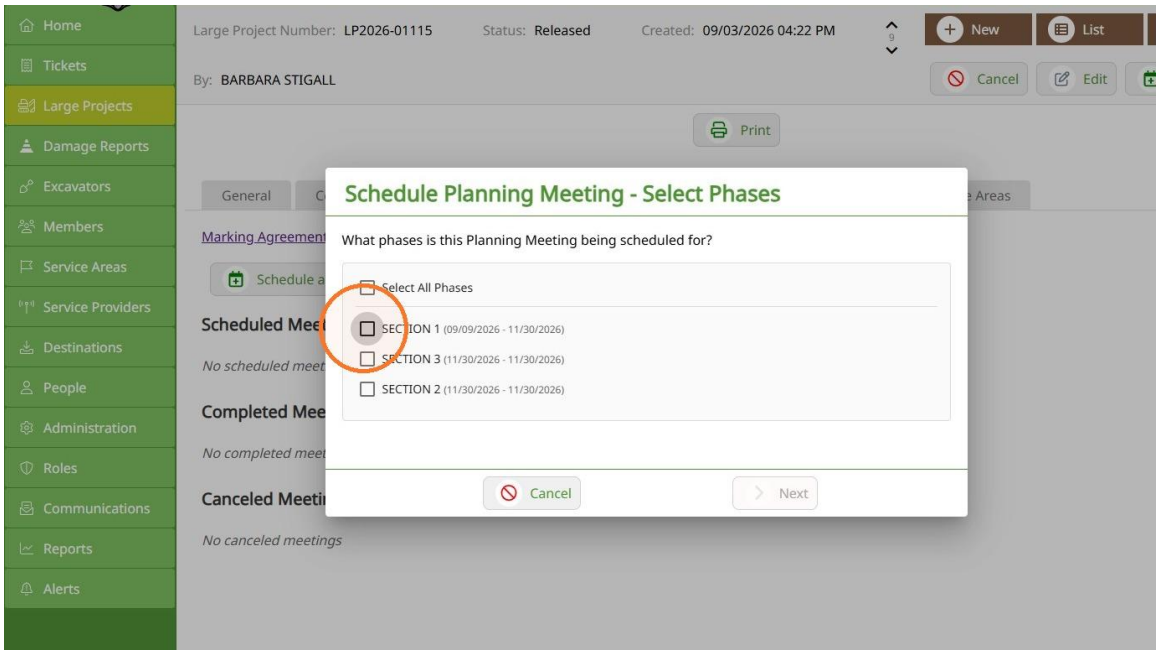
77. You will click "Schedule a Meeting" to schedule a new meeting.



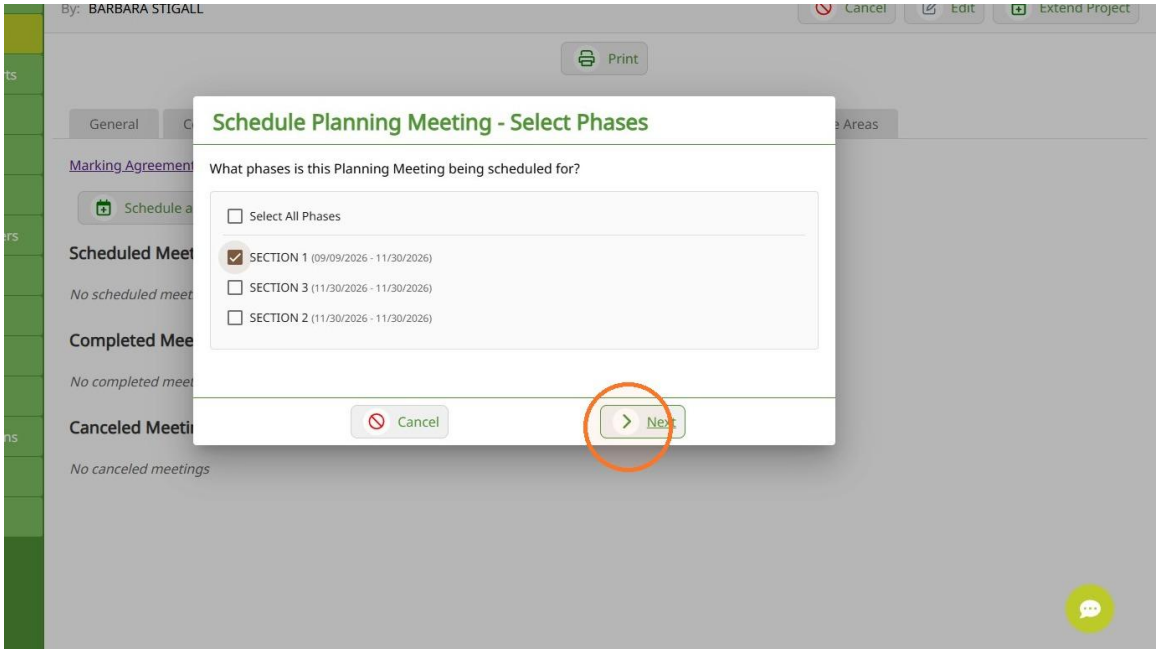
78. You can click the "Select All Phases" field to have the meeting for all phases.



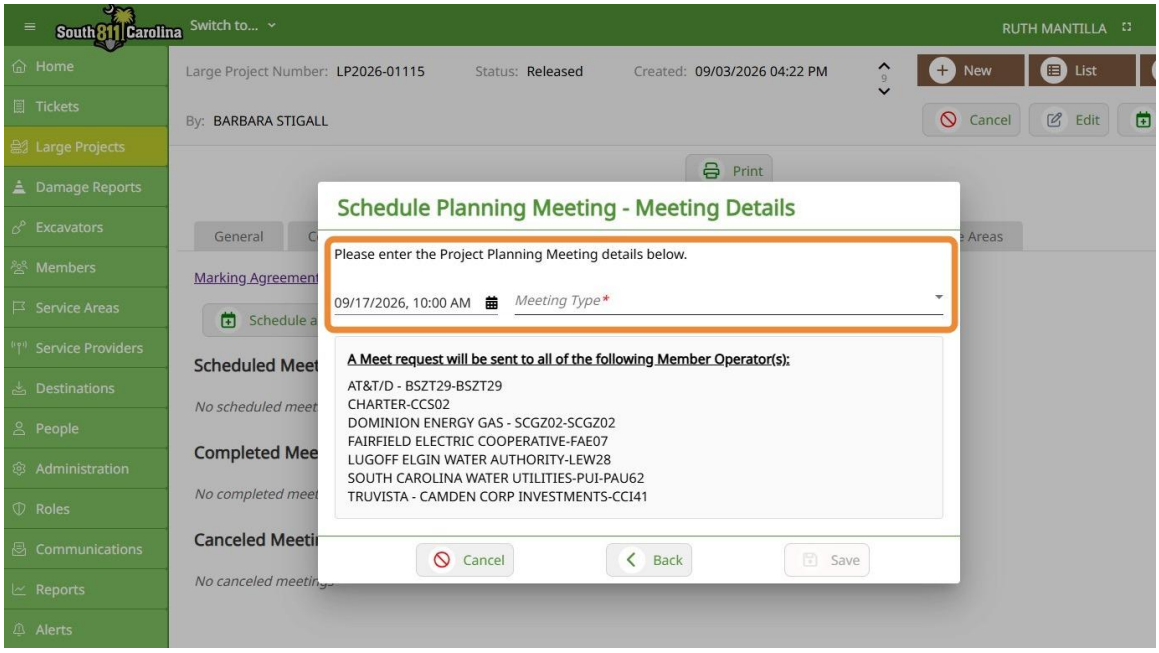
79. Or you can select the specific phase/s you would like for the meeting.



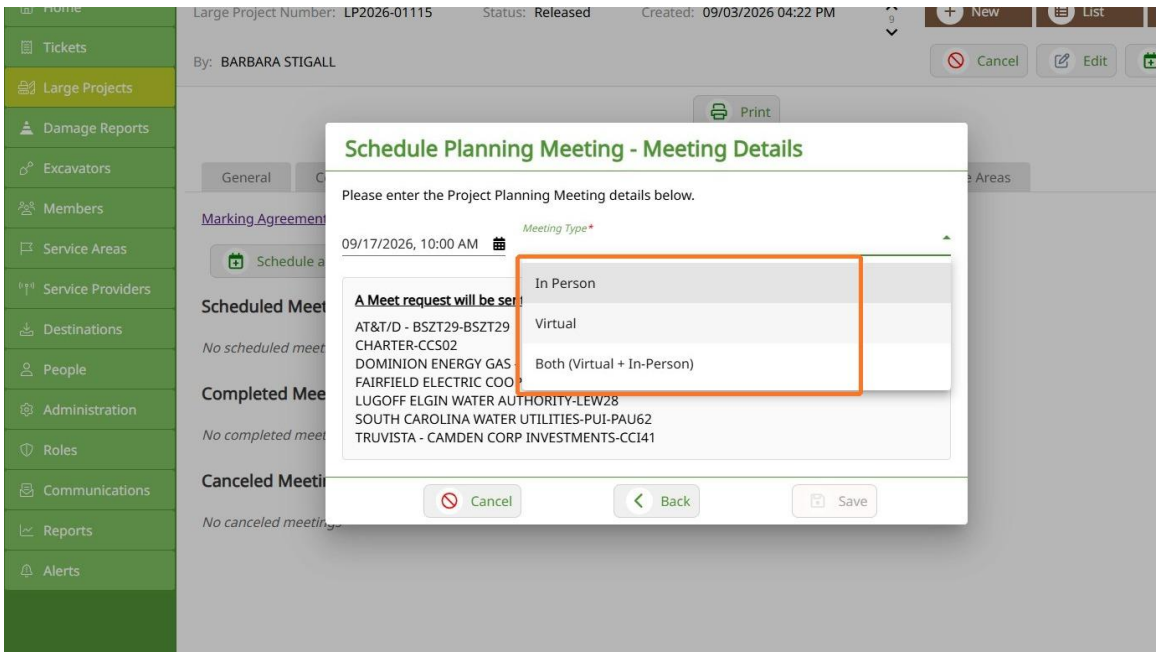
80. Once you have chosen the phase/s you will click the 'Next' button.



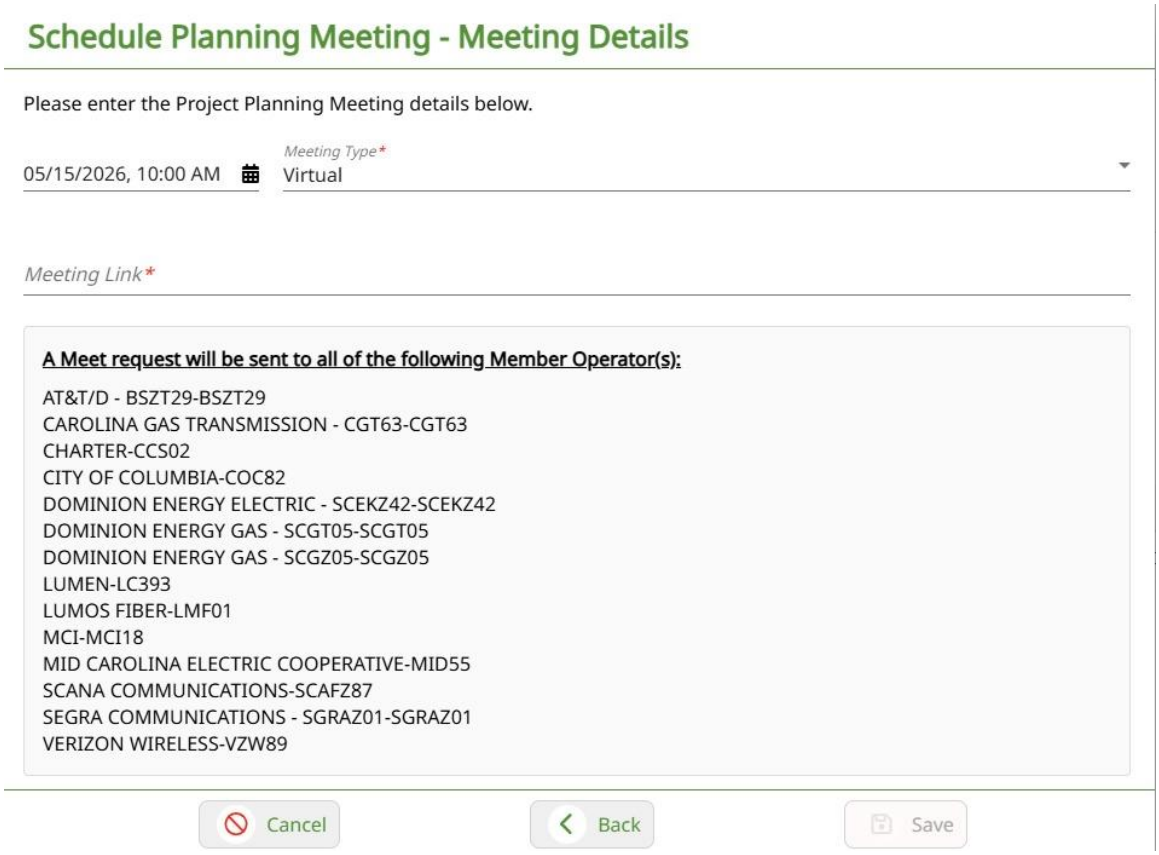
81. Select the **date and time** for the meeting, then indicate whether the meeting will be **virtual, in person or both Virtual and In person**. Be prepared to provide a few flexible scheduling options to ensure all stakeholders have an opportunity to attend.
Select the **date and time** for the meeting, then indicate whether the meeting will be **virtual, in person or both**. Be prepared to provide a few flexible scheduling options to ensure all stakeholders have an opportunity to attend.



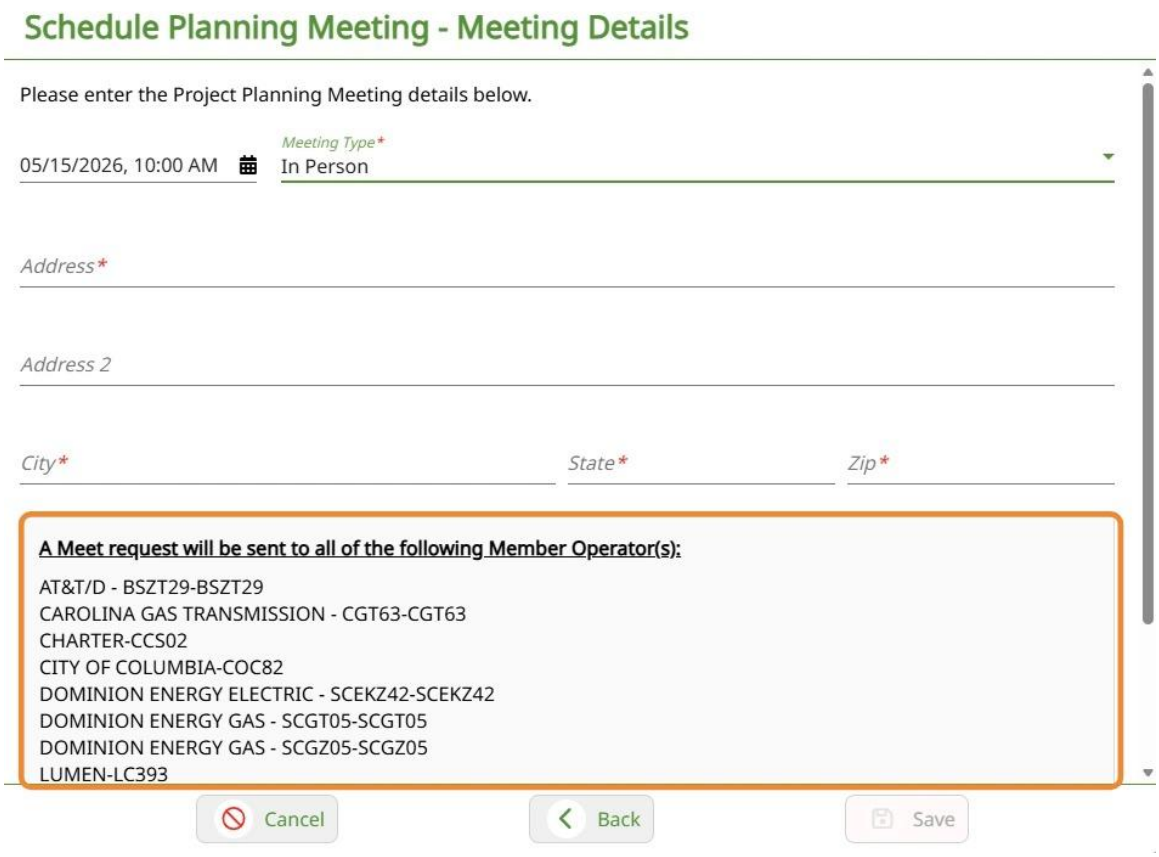
82.



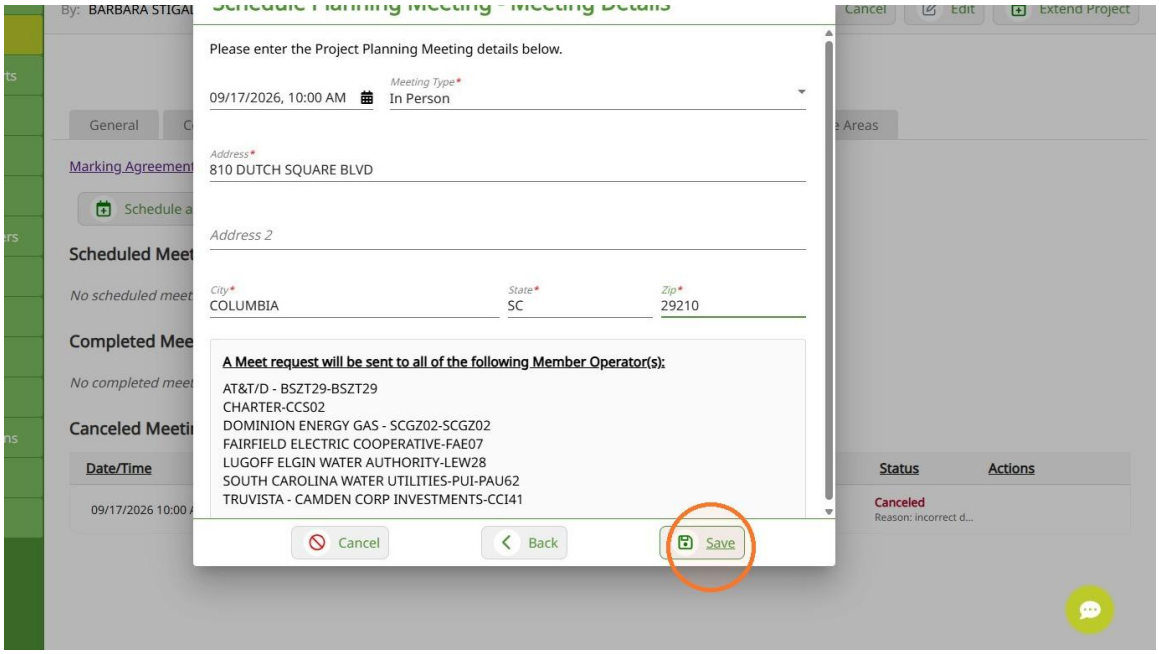
83. If the meeting is **virtual**, an additional field will appear prompting you to enter the meeting link. Provide the full meeting URL in this field so participants can access the session.



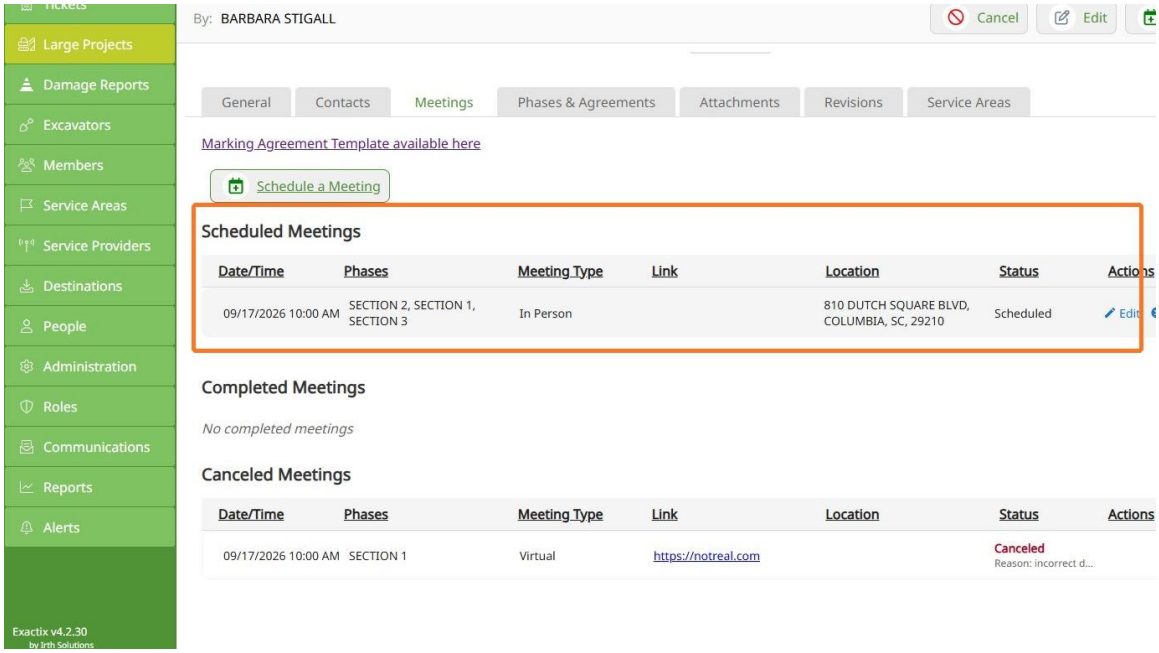
84. If the meeting is **in person**, an address field will appear. Enter the full location where the meeting will take place, then click **Save**.
    Once saved, a meeting request will be generated and sent to all Member Operators affected by the project area.



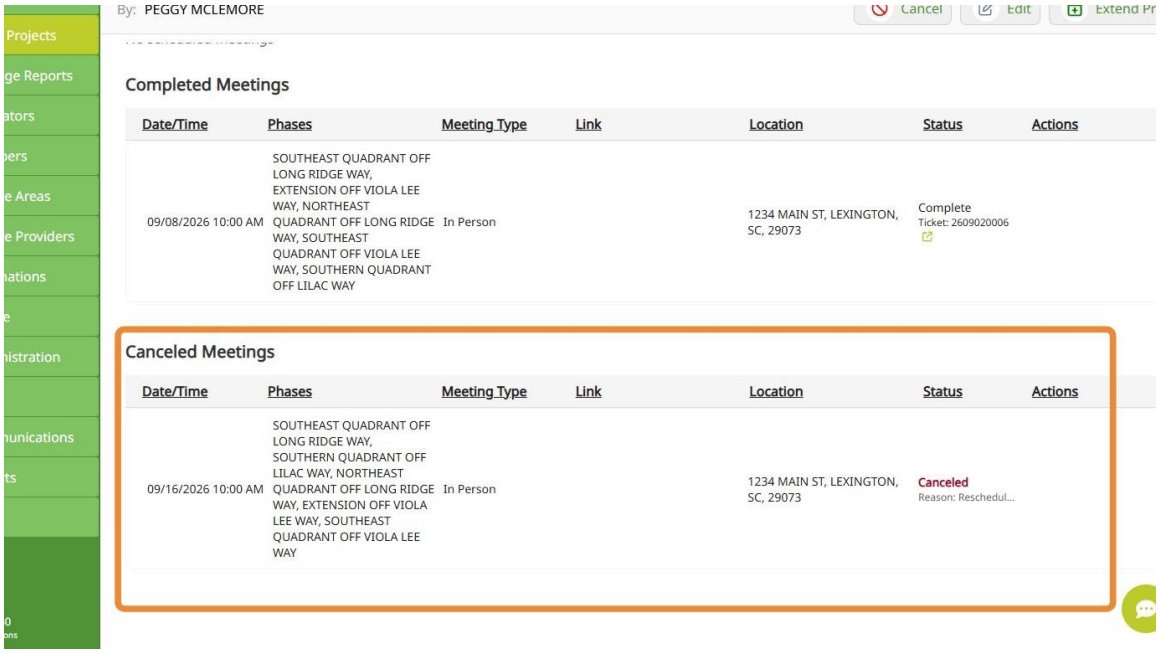
85. Once you have entered all the details click "Save"



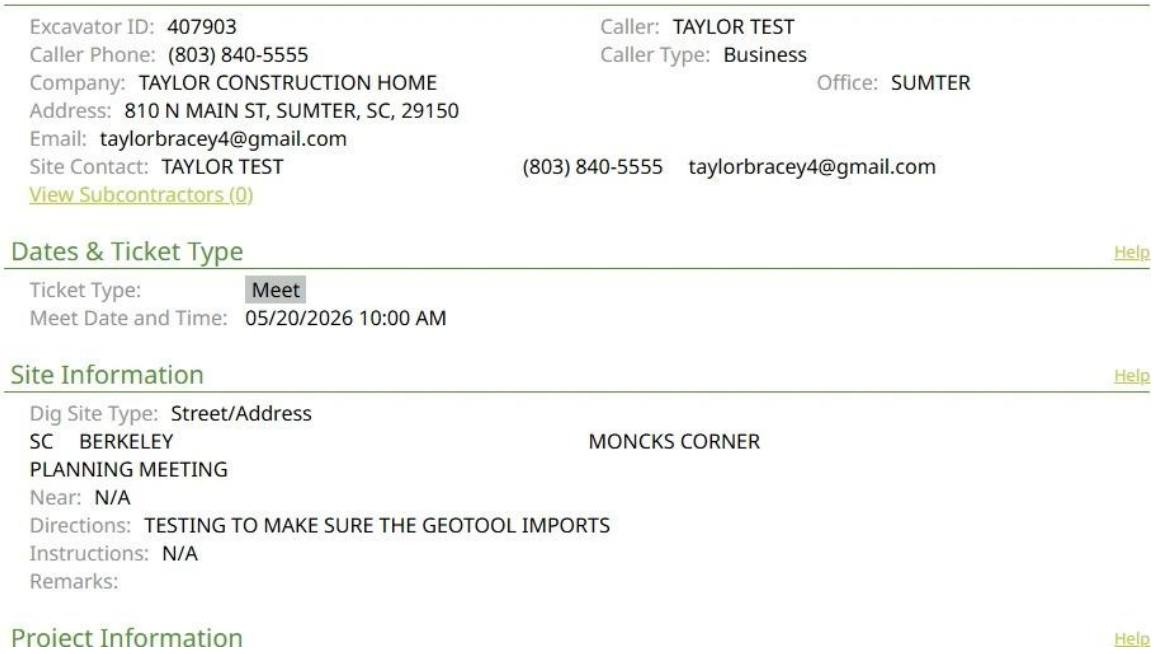
86. The meeting will appear in the 'Meetings' tab under the 'Scheduled Meetings' section.



87. In the 'Meetings' tab you will also find additional sections. The 'Completed Meetings' section will show any past meetings for the project.
    There is also a section for 'Canceled Meetings' showing any meetings that had to be canceled for the project.



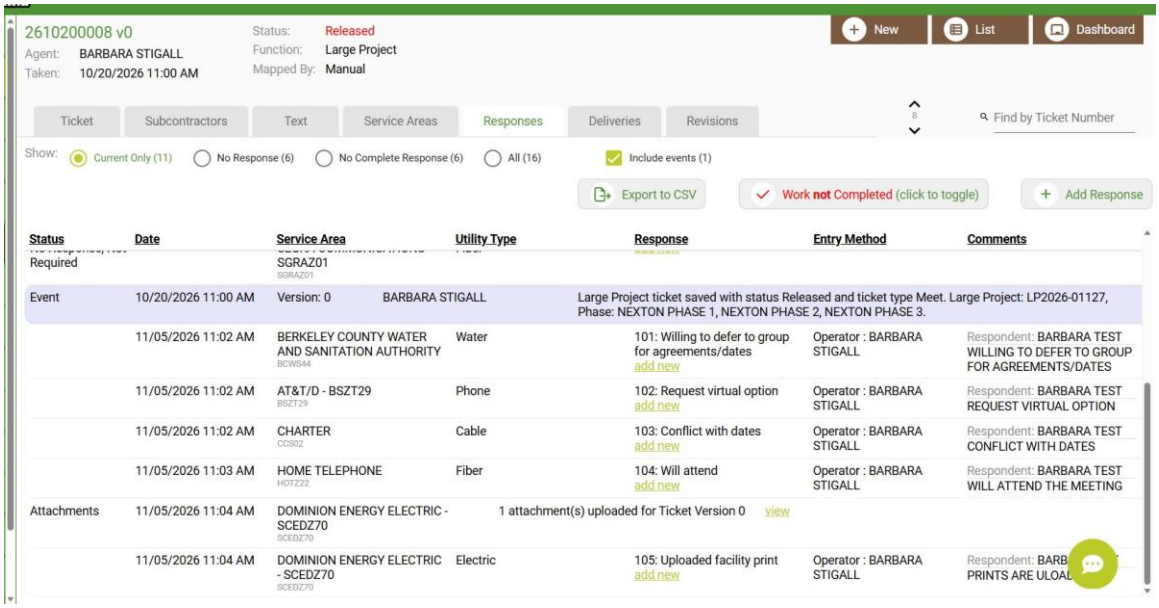
88. **Meet tickets** serve as notifications to affected Member Operators. These tickets do not require any action or response; they are simply an invitation to attend the scheduled meeting.



89. Meet tickets will have a specific set of response codes for locators to use that are only available for Meet tickets.

- 101- Willing to defer to group for agreements/dates

- 102- Request virtual option
- 103 - Conflicts with dates
- 104- Will attend
- 105 - Uploaded facility prints
    - If a Member Operator responds with code 105, they will be required to upload a facility print.



90. Go to the meeting prepared to discuss the selected phase(s). A **Marking Agreement template** is provided for use as a guide when establishing agreements with Member Operators. https://sc811.com/wp-content/uploads/2026/05/Large-Project-Facility-Location-Agreement-rev-20251208-1.pdf
Please note that if a Member Operator does not attend the meeting or an agreement cannot be reached, their marking timeline will default to the agreed timeframe established by the other participating operators.

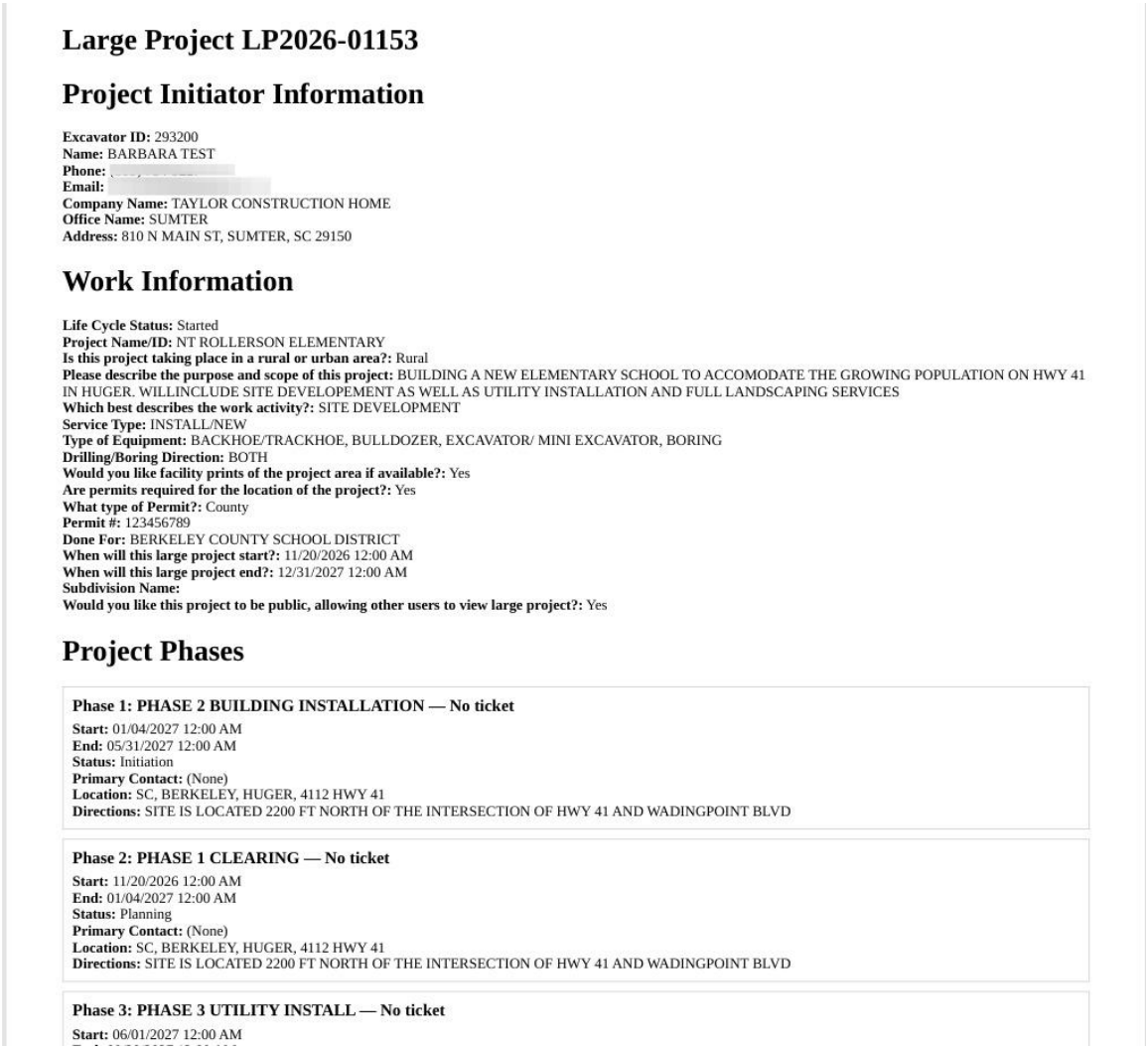
LARGE PROJECT FACILITY LOCATION AGREEMENT

INTRODUCTION

The Large Project Facility Location Agreement was created to help manage marking needs over the course of a Large Project. The Large Project Facility Location Agreement is required to be completed prior to the Large Project Planning Meeting. You must provide a proposed Large Project Facility Location Agreement for consideration at the Large Project Planning Meeting. The Large Project Planning Meeting Agreement must be executed and acknowledged by all Parties prior to any Large Project advancing beyond the planning stage. You should provide enough copies of the Large Project Facility Location Agreement to accommodate each facility operator, locator, and excavator identified and involved in any excavation or demolition work on the Large Project. For Large Projects conducted in phases, sections for description of each phase have been provided. Supplying plats, drawings, and/or other information sufficient to provide a reasonably complete overview of the large project is required. *See* S.C. Code Ann. § 58-36-75(E)(1). A sign-in sheet for all attendees is included and must be provided to SC811.

You must list all subcontractors that will be involved in the Large Project. You must also list all designees of the Large Project.

91. Meet tickets generated for planning meetings will now include a PDF attachment link. This will allow locators to access Large Project details directly from the meet tickets.



Large Project LP2026-01153

Project Initiator Information

Excavator ID: 293200
Name: BARBARA TEST
Phone:
Email:
Company Name: TAYLOR CONSTRUCTION HOME
Office Name: SUMTER
Address: 810 N MAIN ST, SUMTER, SC 29150

Work Information

Life Cycle Status: Started
Project Name/ID: NT ROLLERSON ELEMENTARY
Is this project taking place in a rural or urban area?: Rural
Please describe the purpose and scope of this project: BUILDING A NEW ELEMENTARY SCHOOL TO ACCOMODATE THE GROWING POPULATION ON HWY 41 IN HUGER. WILLINCLUDE SITE DEVELOPEMENT AS WELL AS UTILITY INSTALLATION AND FULL LANDSCAPING SERVICES
Which best describes the work activity?: SITE DEVELOPMENT
Service Type: INSTALL/NEW
Type of Equipment: BACKHOE/TRACKHOE, BULLDOZER, EXCAVATOR/ MINI EXCAVATOR, BORING
Drilling/Boring Direction: BOTH
Would you like facility prints of the project area if available?: Yes
Are permits required for the location of the project?: Yes
What type of Permit?: County
Permit #: 123456789
Done For: BERKELEY COUNTY SCHOOL DISTRICT
When will this large project start?: 11/20/2026 12:00 AM
When will this large project end?: 12/31/2027 12:00 AM
Subdivision Name:
Would you like this project to be public, allowing other users to view large project?: Yes

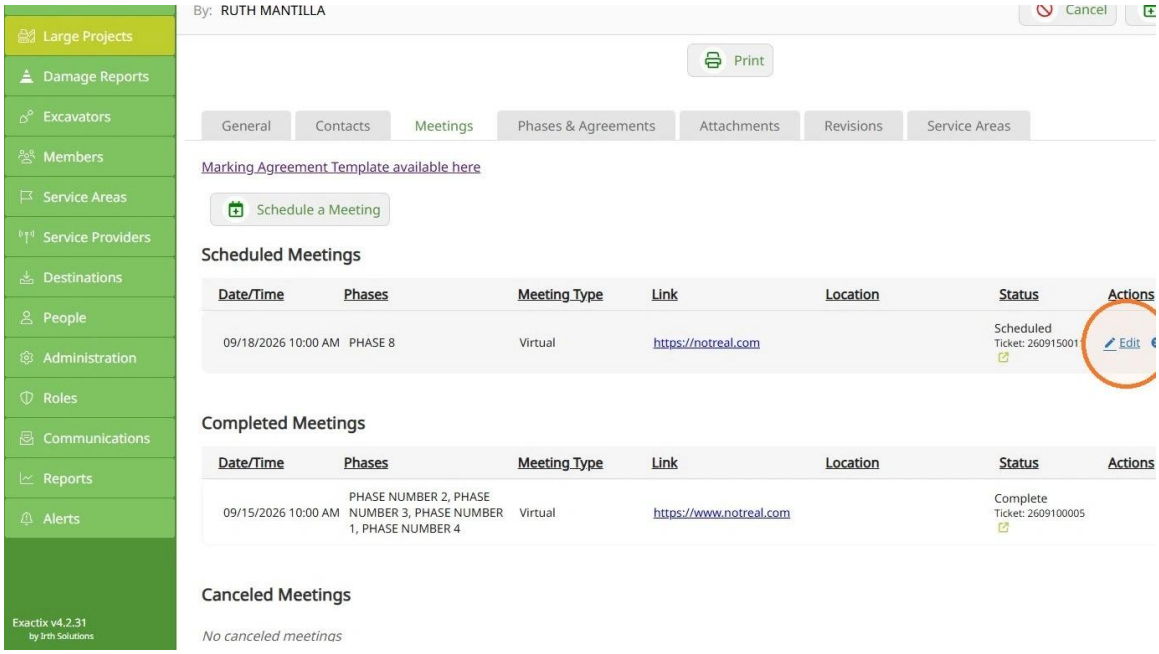
Project Phases

Phase 1: PHASE 2 BUILDING INSTALLATION — No ticket
Start: 01/04/2027 12:00 AM
End: 05/31/2027 12:00 AM
Status: Initiation
Primary Contact: (None)
Location: SC, BERKELEY, HUGER, 4112 HWY 41
Directions: SITE IS LOCATED 2200 FT NORTH OF THE INTERSECTION OF HWY 41 AND WADINGPOINT BLVD

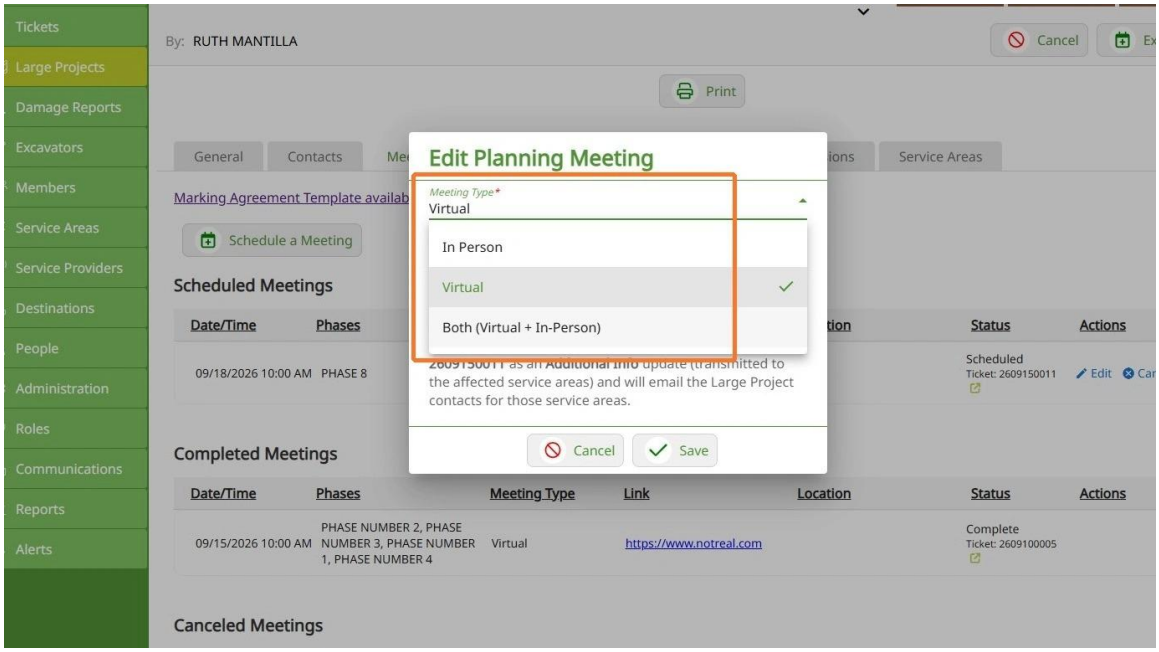
Phase 2: PHASE 1 CLEARING — No ticket
Start: 11/20/2026 12:00 AM
End: 01/04/2027 12:00 AM
Status: Planning
Primary Contact: (None)
Location: SC, BERKELEY, HUGER, 4112 HWY 41
Directions: SITE IS LOCATED 2200 FT NORTH OF THE INTERSECTION OF HWY 41 AND WADINGPOINT BLVD

Phase 3: PHASE 3 UTILITY INSTALL — No ticket
Start: 06/01/2027 12:00 AM

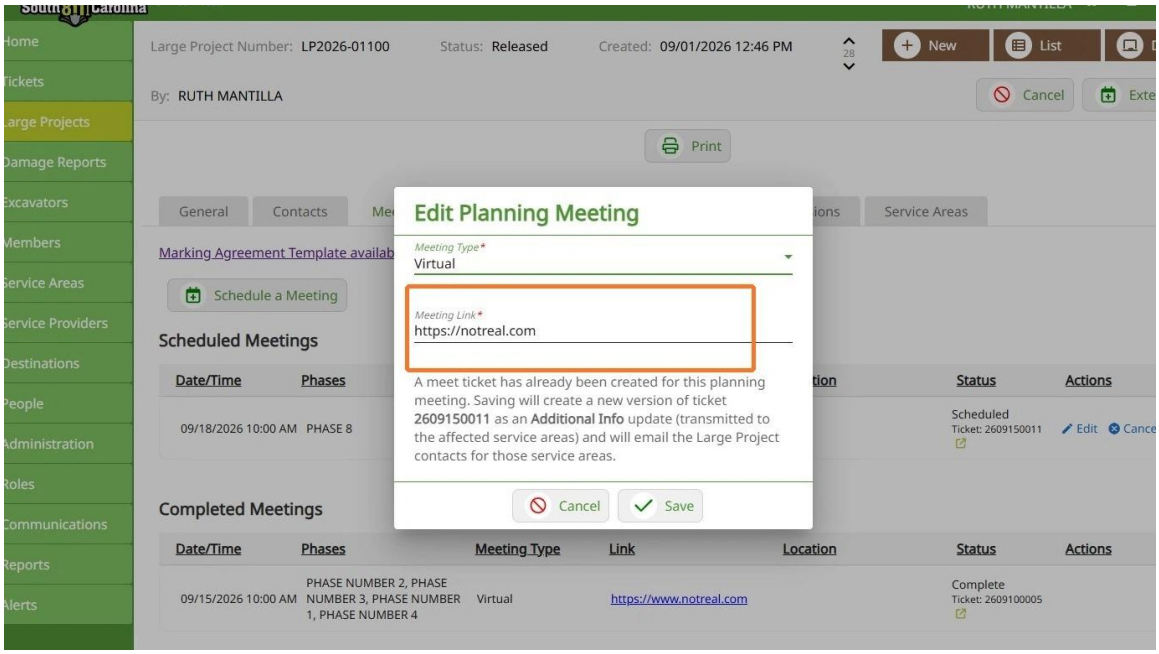
92. **Editing a Planning Meeting**
    You can edit meetings as long as they have not been canceled or passed their scheduled date. To edit a meeting, go to the **Meetings** tab and select **Edit** next to the scheduled meeting you would like to modify.



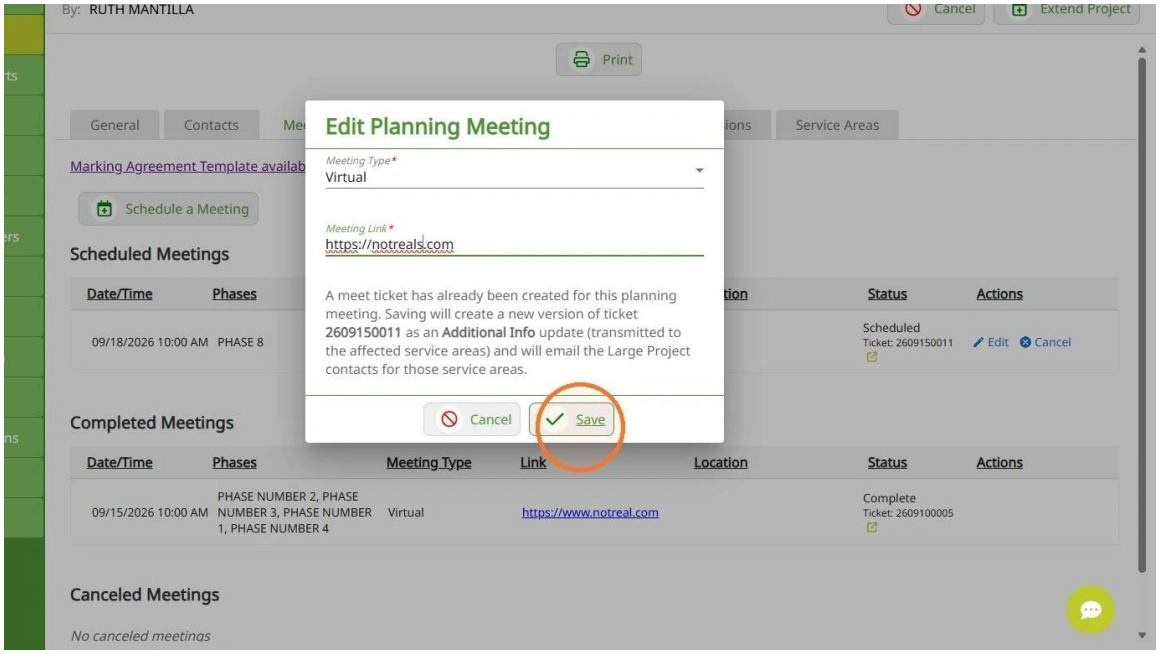
93. If you need to change the meeting type, click the **Meeting Type** drop-down arrow and select **In Person**, **Virtual**, or **Both**.



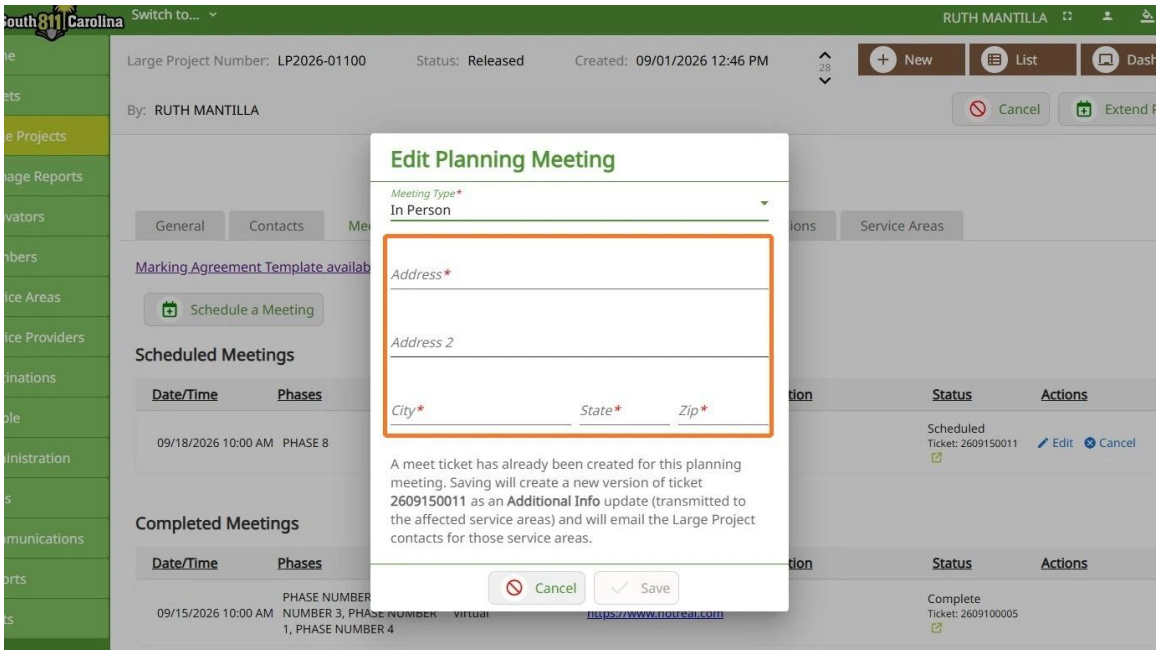
94. If the meeting is **Virtual**, click the **Meeting Link** field to make any necessary changes.



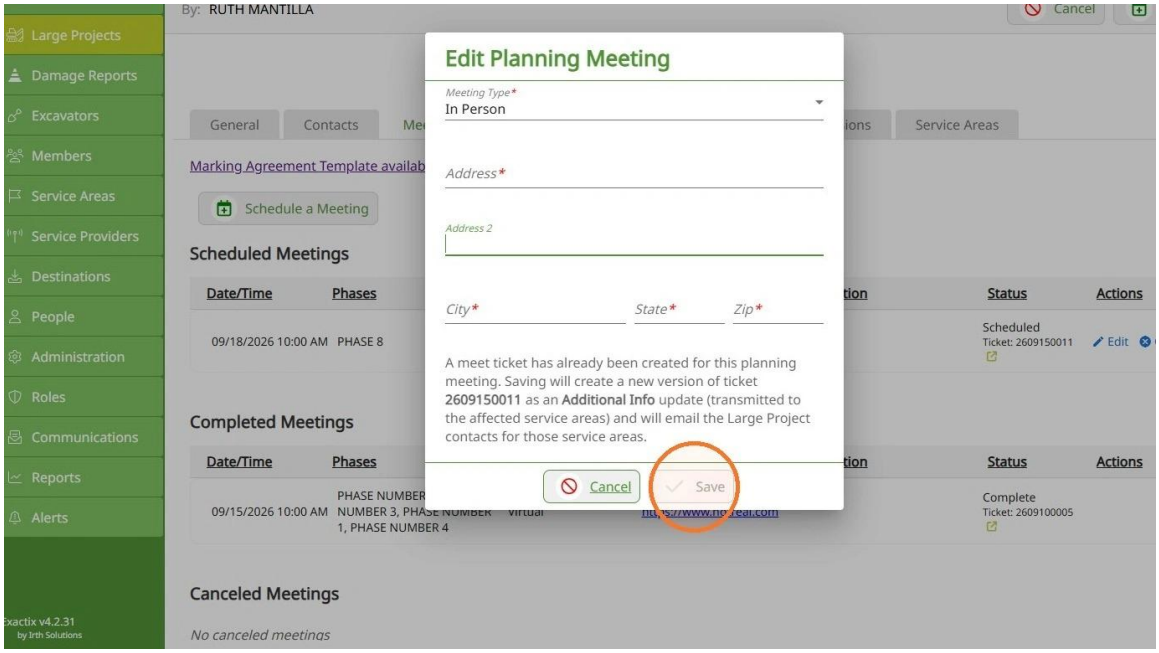
95. Click the **Save** button to save all changes.



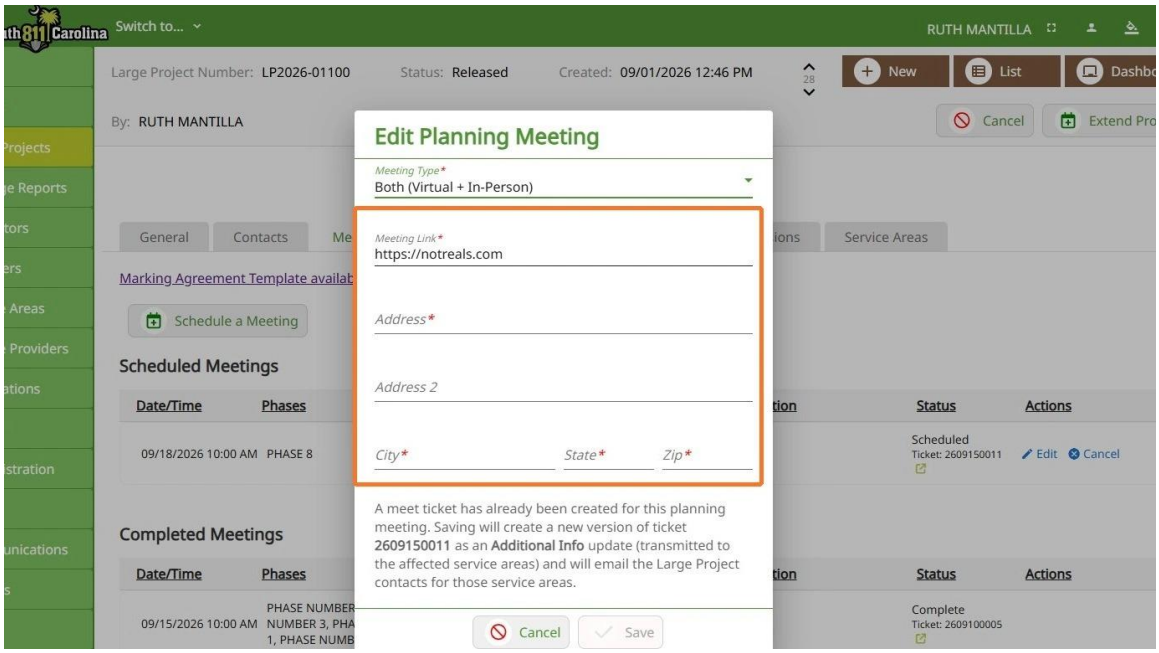
96. If the meeting is in person, click the **Address** field to make any changes to the meeting location.



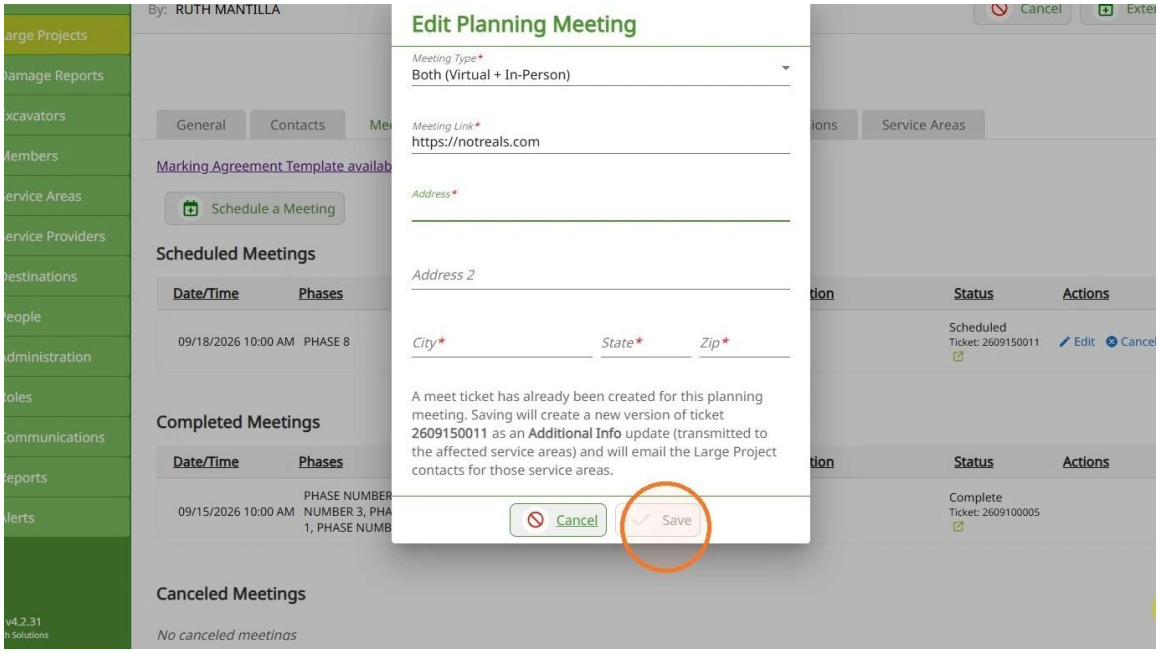
97. Click the **Save** button to save all changes.



98. If the meeting is **Both (Virtual + In-Person)**, click the **Meeting Link** and/or **Address** fields to make changes to the information that needs to be updated.

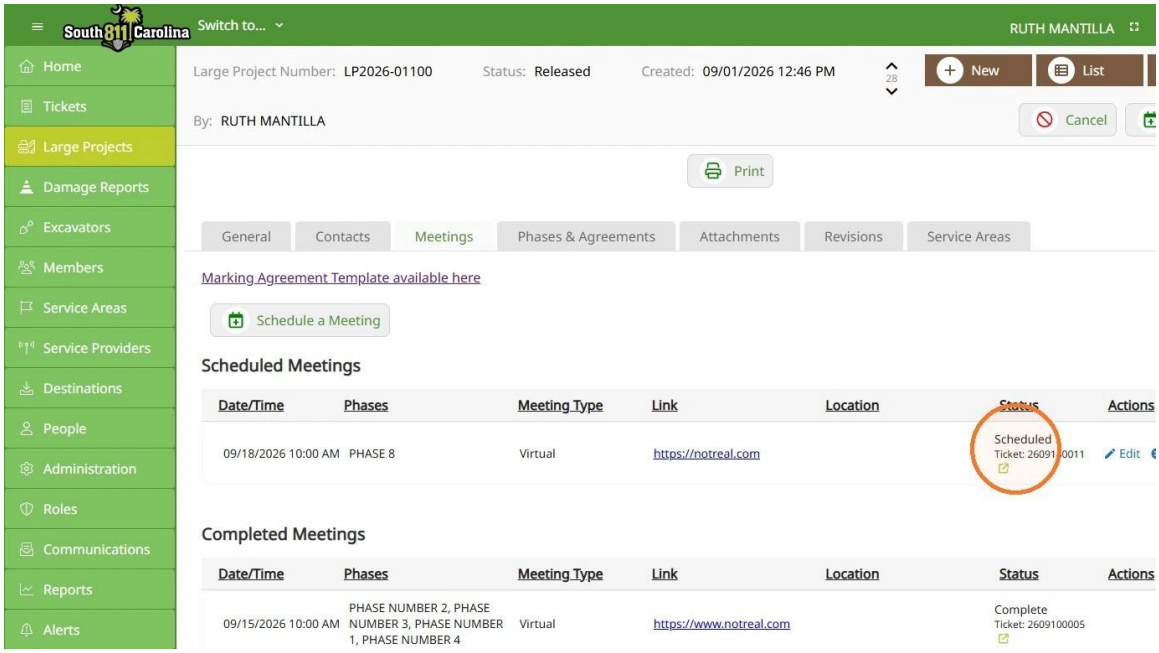


99. Click the **Save** button to save all changes.

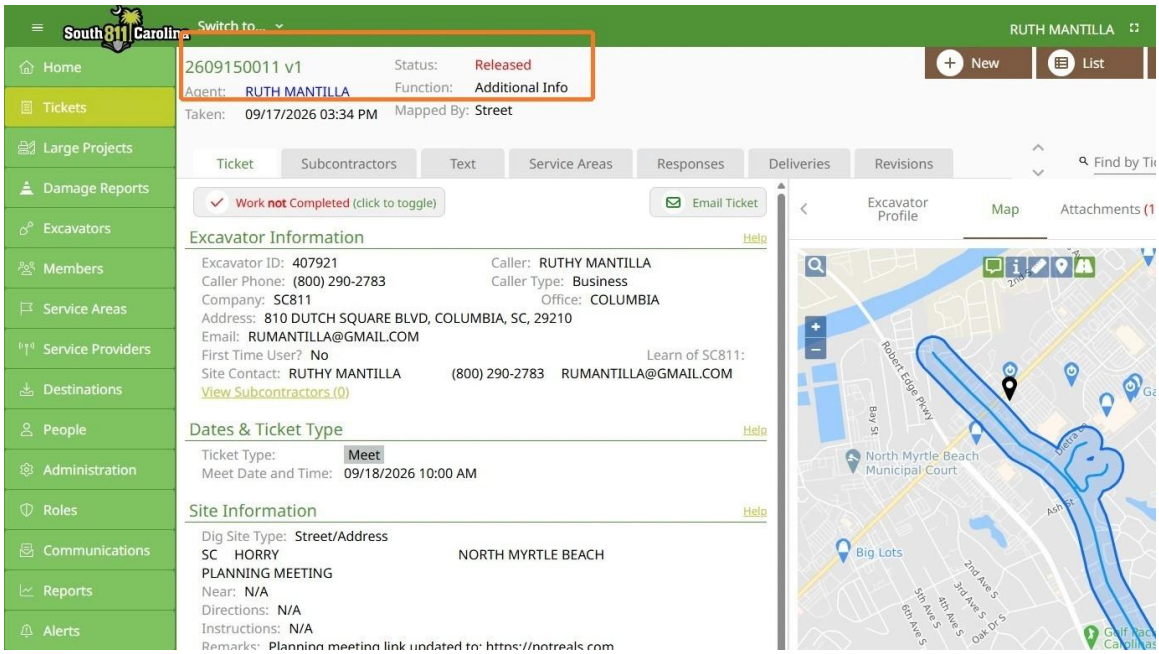


Please note that changes to the **Date and Time** of the meeting cannot be edited and would require a new Meeting to be scheduled.

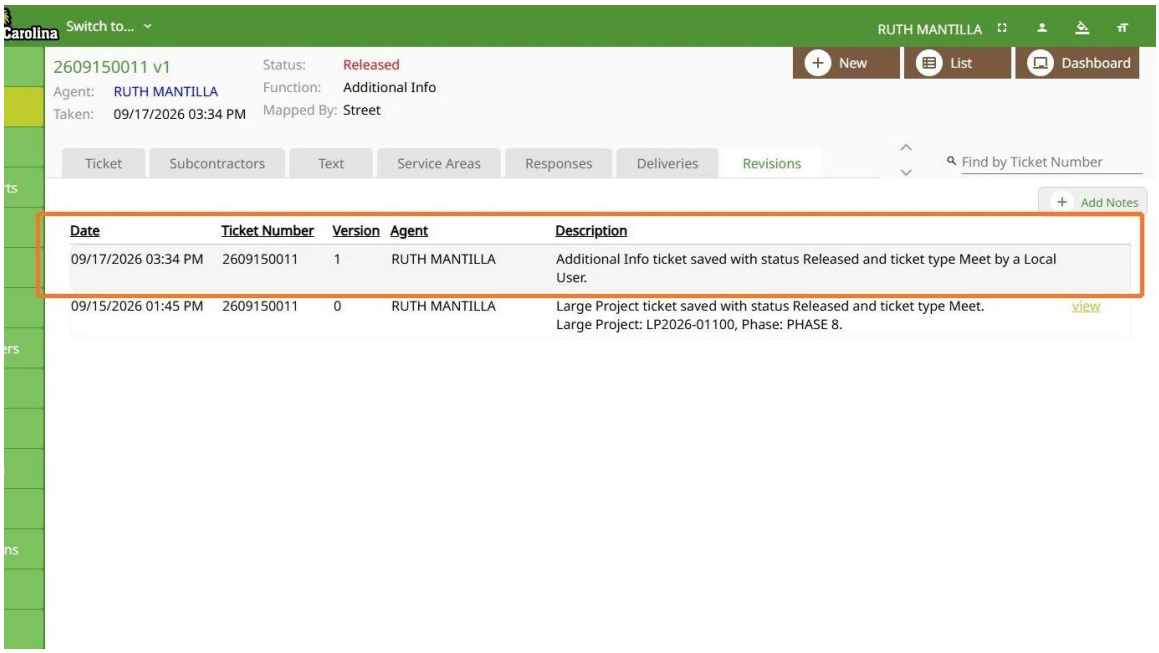
100. Once the changes have been made and the details have been saved, you will see that an **Additional Info** ticket has been released.
Go to the **Meetings** tab. Under the **Status** column for the scheduled meeting, click the link to the ticket.



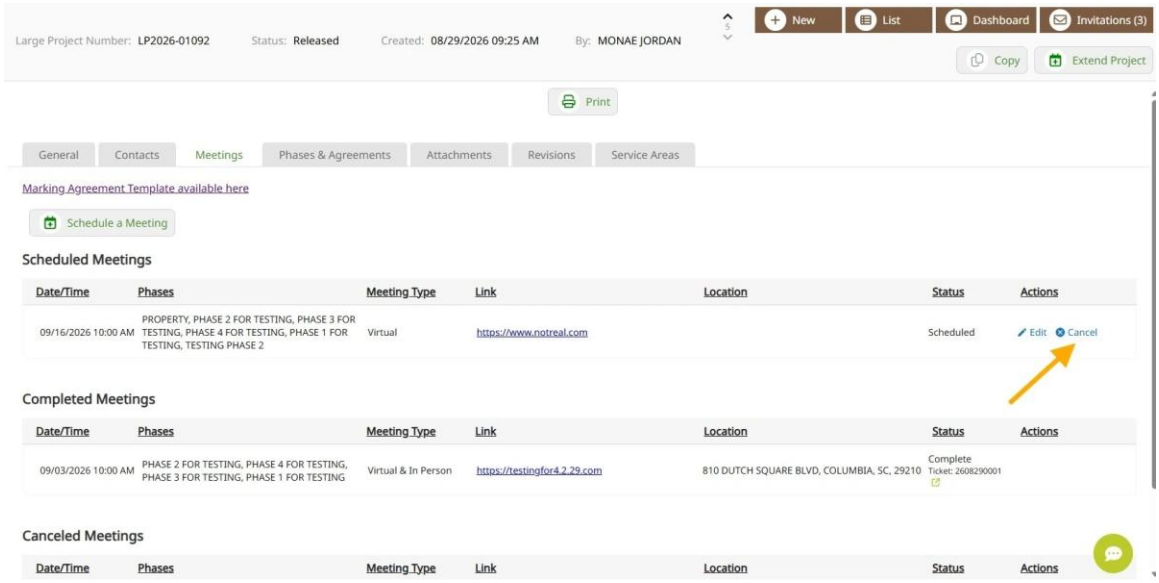
101. The link will open the new ticket version and display the function as **Additional Info**.



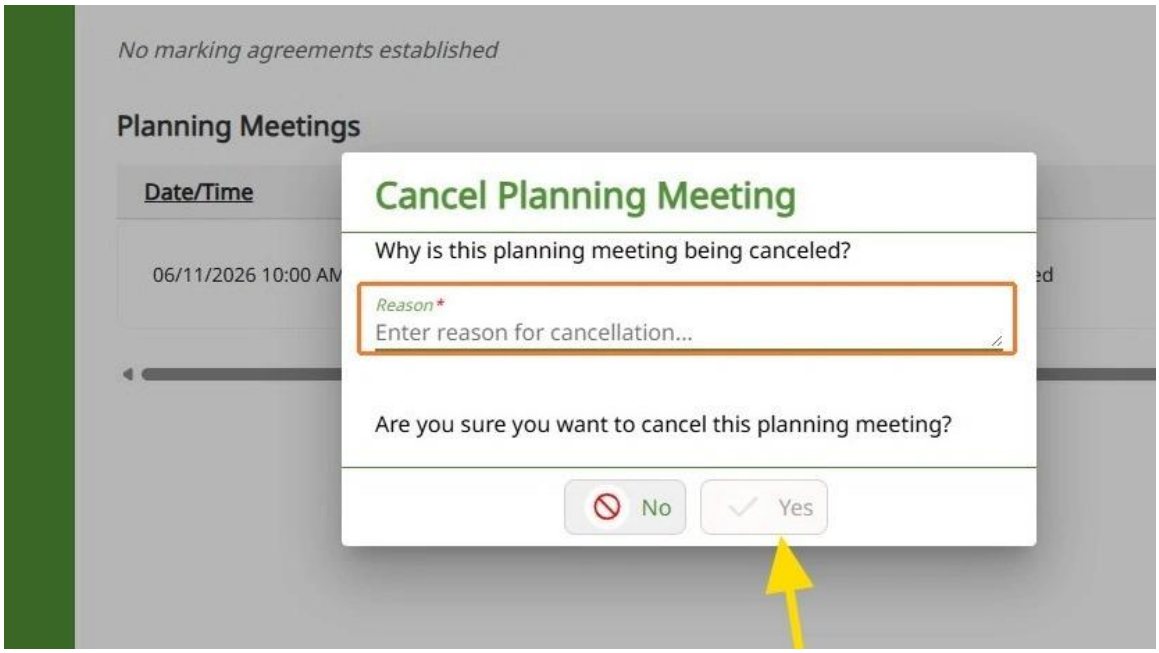
102. The details will also be visible in the **Revisions** tab, including the date and time of the changes and the person who made them.



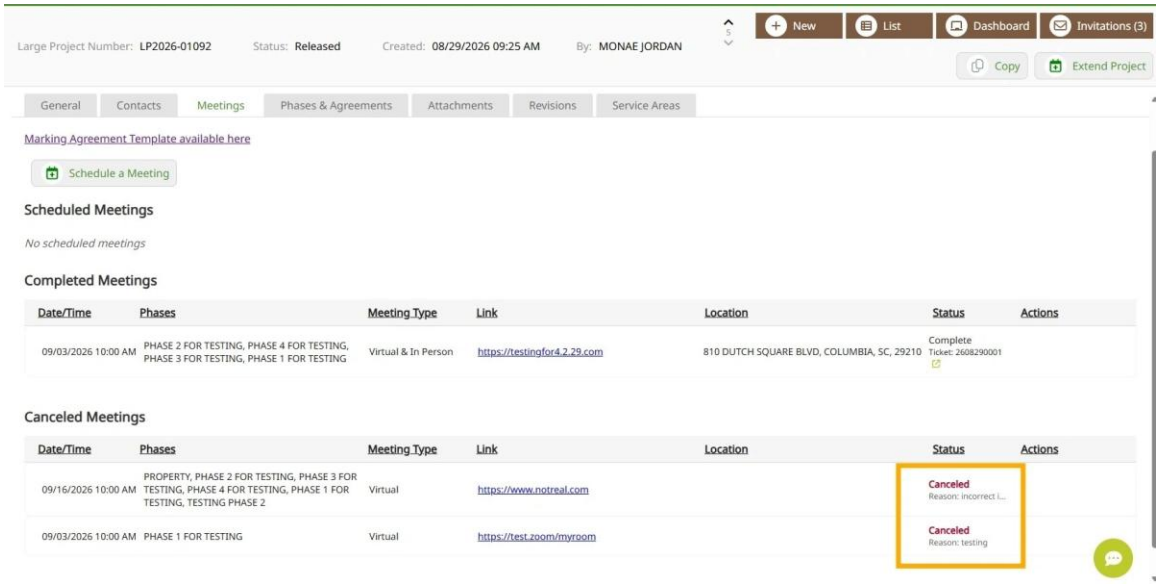
103. If a Planning Meeting needs to be canceled, you can do so directly from the **Meetings** tab by selecting **Cancel** in the **Actions** column. Canceling a Planning Meeting will also automatically cancel the associated **Meet** ticket.



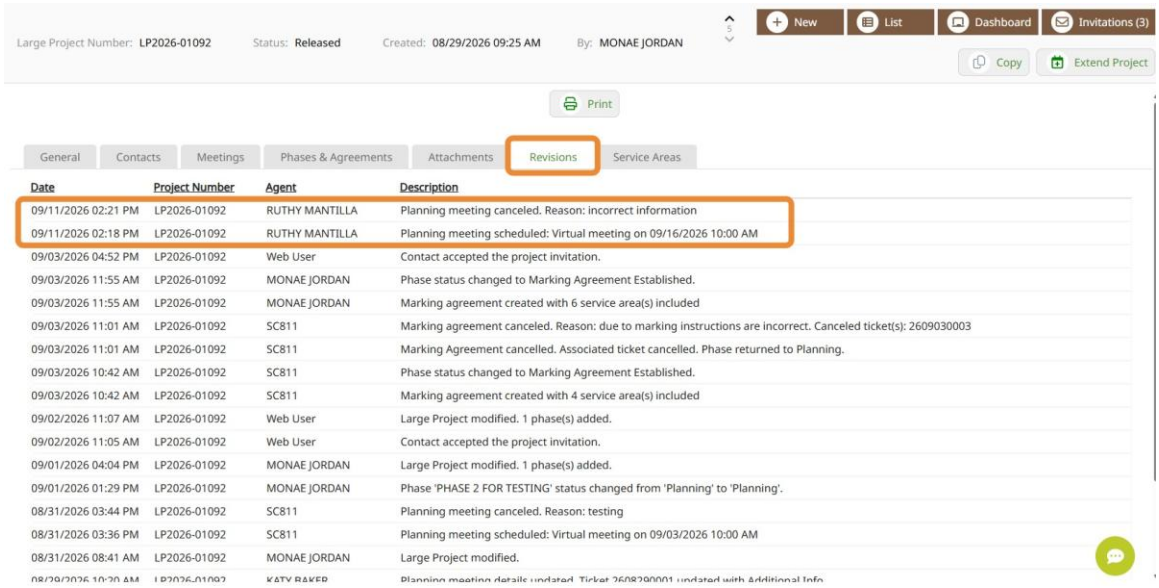
104. After clicking **Cancel** next to the Planning Meeting you wish to cancel, the **Cancel Planning Meeting** pop-up window will appear. Enter the reason for canceling the meeting, then confirm that you want to proceed with the cancellation. Once confirmed, the Planning Meeting and its associated **Meet** ticket will be canceled.



105. Once the Planning Meeting has been canceled, its status will be updated and reflected in the **Status** section of the **Planning Meetings**. If needed, you can schedule a new Planning Meeting at a later date.



106. The **Revisions** tab displays a history of changes made to the project, including what was changed, when the change occurred, and which user made the update.



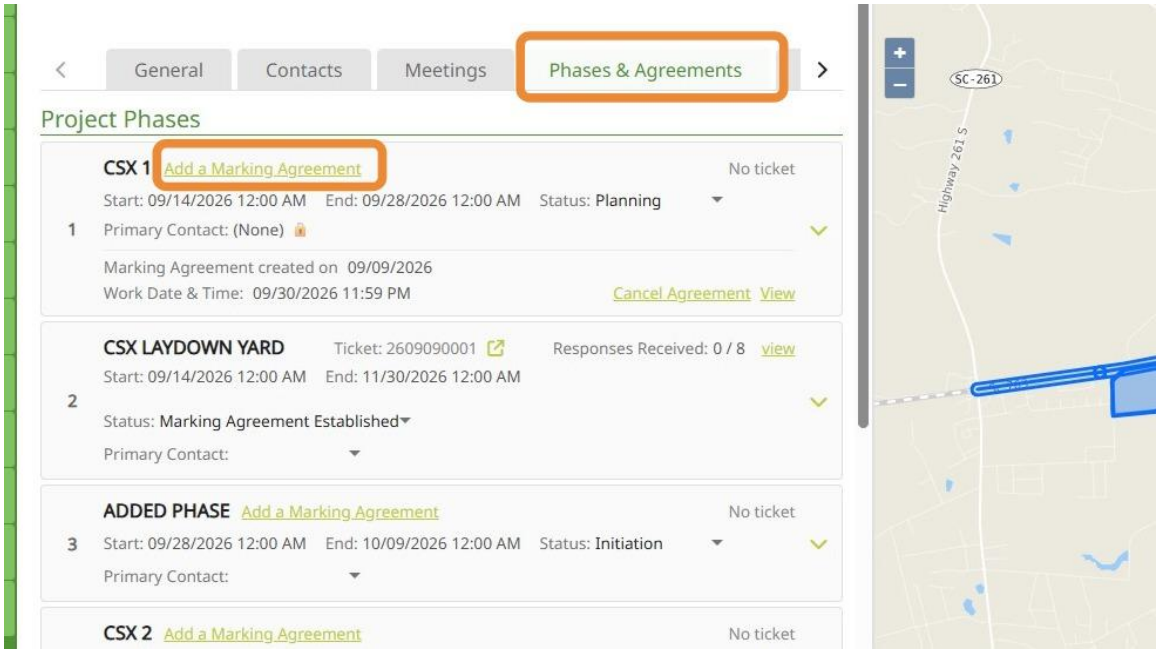
Marking Agreements

107.

Updating Phases Before Adding a Marking Agreement

The next step is to add the agreed-upon **Marking Agreement**. Before adding the Marking Agreement, review the phases to make sure they reflect what was agreed upon during the planning meeting.
If it was determined during the planning meeting that the phases need to be adjusted, you will need to **edit the phases before adding the Marking Agreement**. This ensures the phases match the agreed-upon marking schedule.
Important: Phases that are tied to a planning meeting **cannot be deleted**. If changes are needed, the existing phases must be edited to reflect the updated information.
After the phases have been updated, you can proceed with adding the agreed-upon Marking Agreement.
We will cover the steps for editing phases and making changes to the project in a separate section of this manual.

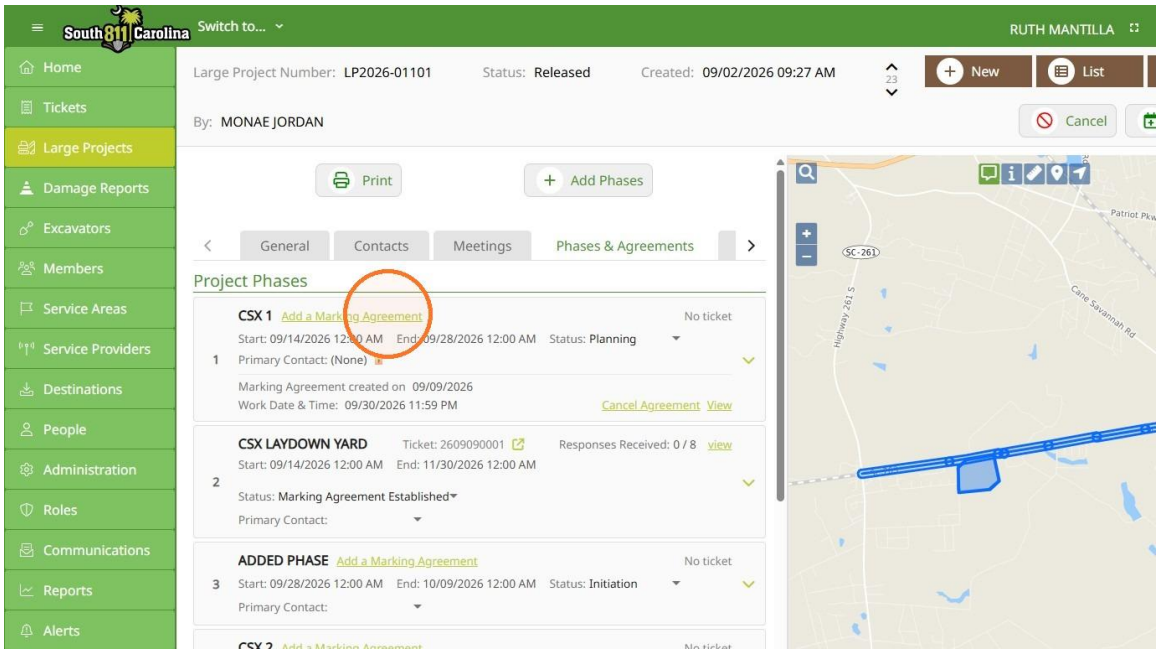
108. To add a marking agreement, click the "Phases & Agreements" tab. This tab becomes available once the project has been submitted.
Under each phase, the option to "Add a Marking Agreement" will be available as long as at least **one** planning meeting has taken place.



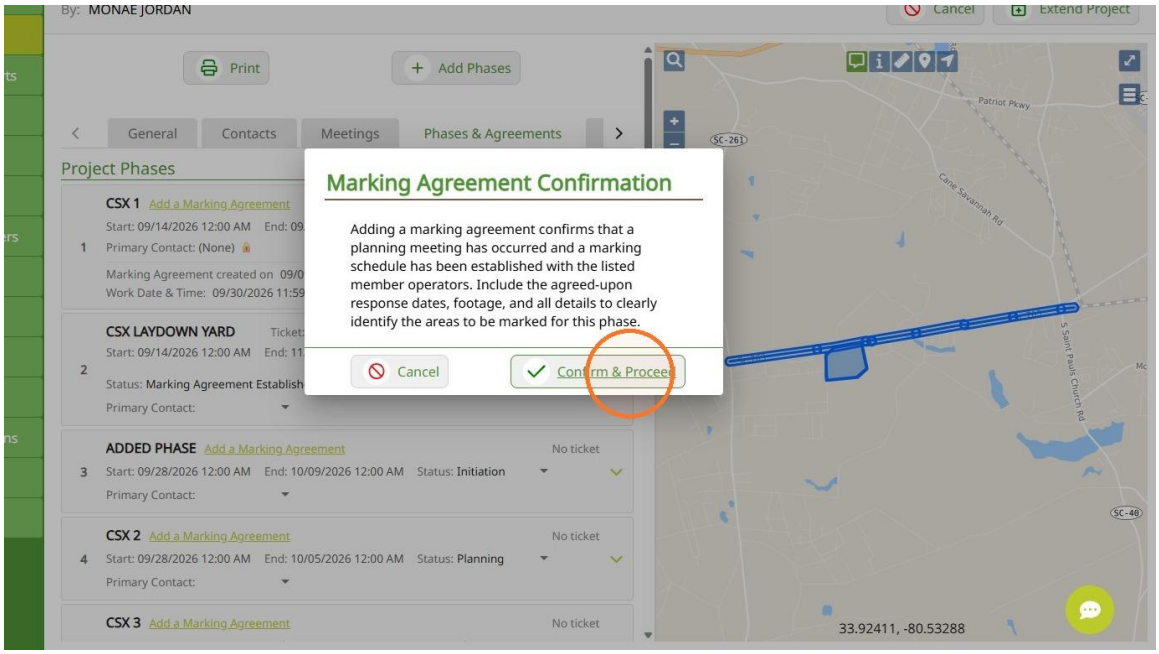
109. A marking agreement must be entered for each phase. The marking agreement is determined during the planning meeting and agreed upon by the Member Operators and Excavator.

Think of the marking agreement as the marking instructions you would see on a standard 3-day locate notice. It provides the specific instructions Member Operators and Excavators have agreed to follow for marking the utilities during that phase of the project.

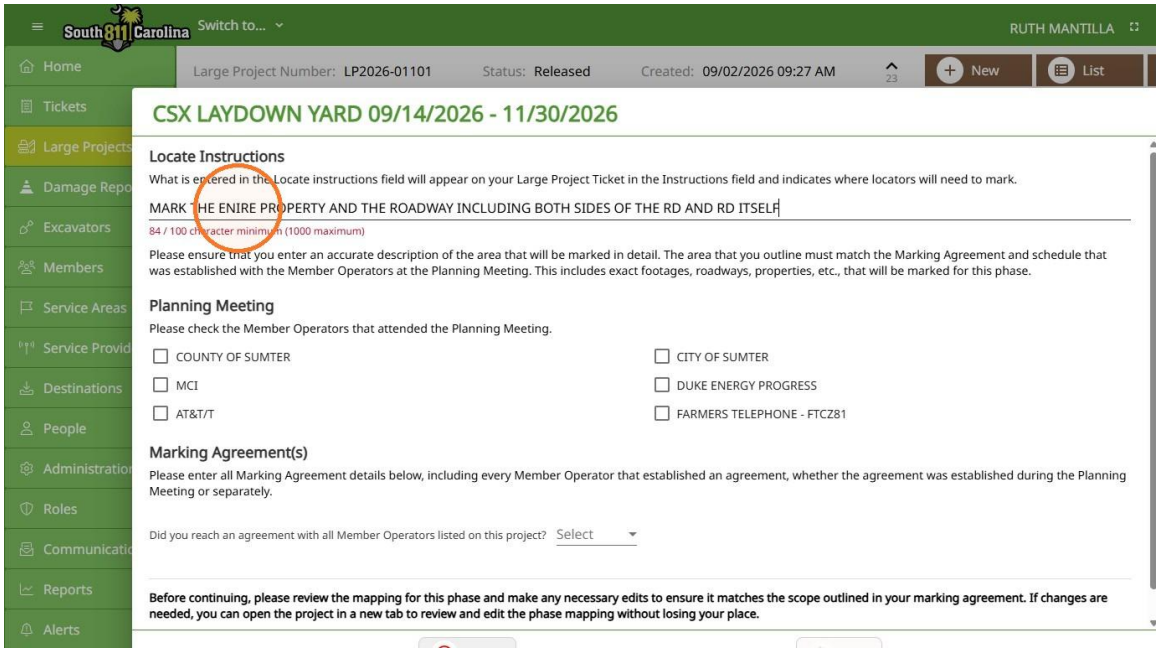
To add a marking agreement, click **"Add a Marking Agreement."** Each phase will have its own section where the marking agreement can be entered.



110. Once you click the option a pop up will appear. You will click "Confirm & Proceed"



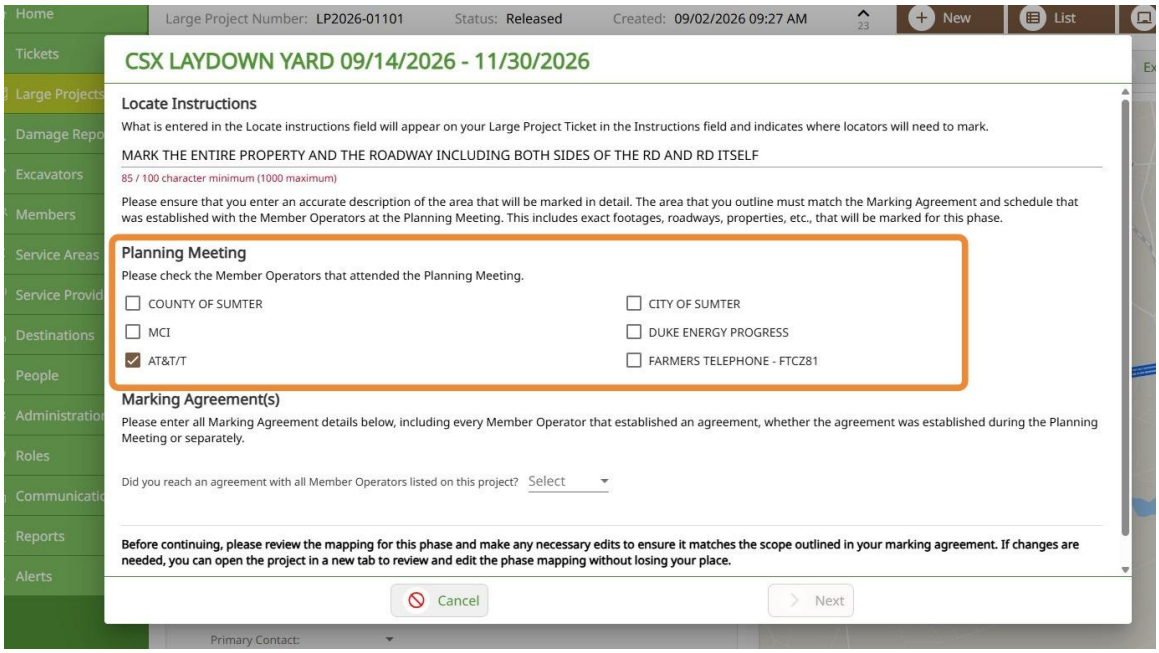
111. Next, enter the marking instructions in the **“Locate Instructions”** field. Instructions must be between **100 and 1,000 characters**.
Marking agreements and marking instructions should be detailed and clearly identify what areas are expected to be marked. This includes details such as the starting point, which side of the road, direction of travel for marking, footage or distance to be marked, where on a property or parcel, and any other details needed to identify the exact areas included in the agreement.



112. After entering the locate instructions, indicate which Member Operators attended the planning meeting. The attendees listed may not be the same as the Member Operators with whom an agreement was reached. This section is used only to record planning meeting attendance.

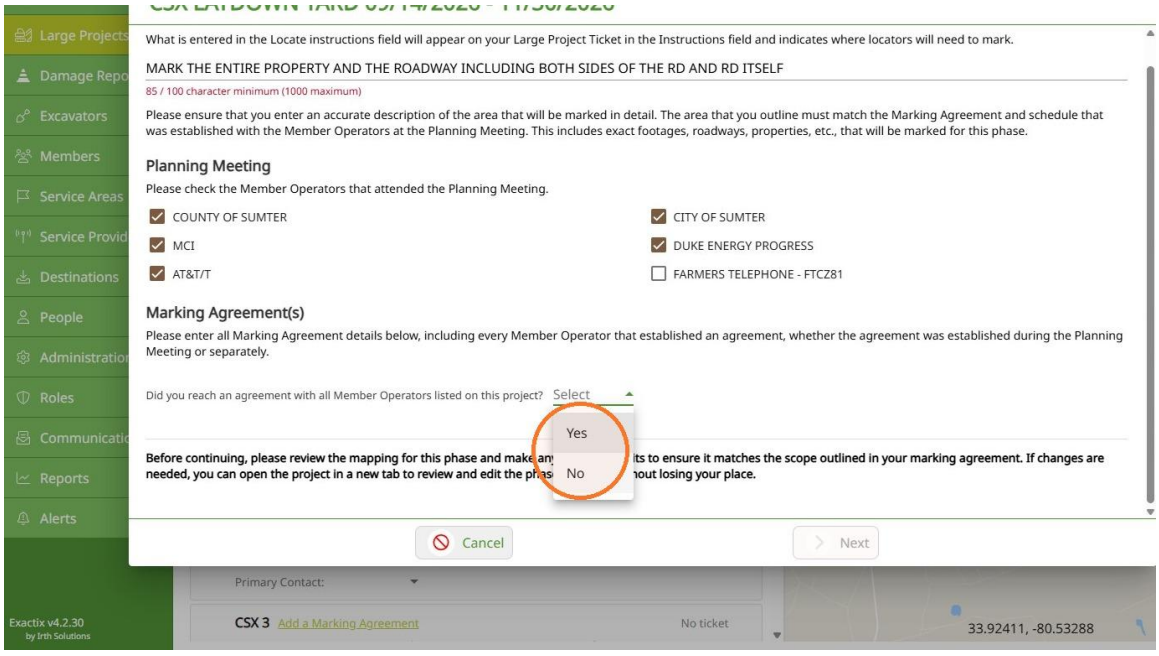
- Check the box for each Member Operator who attended the planning meeting.

- Leave the box blank for each Member Operator who did **not** attend.

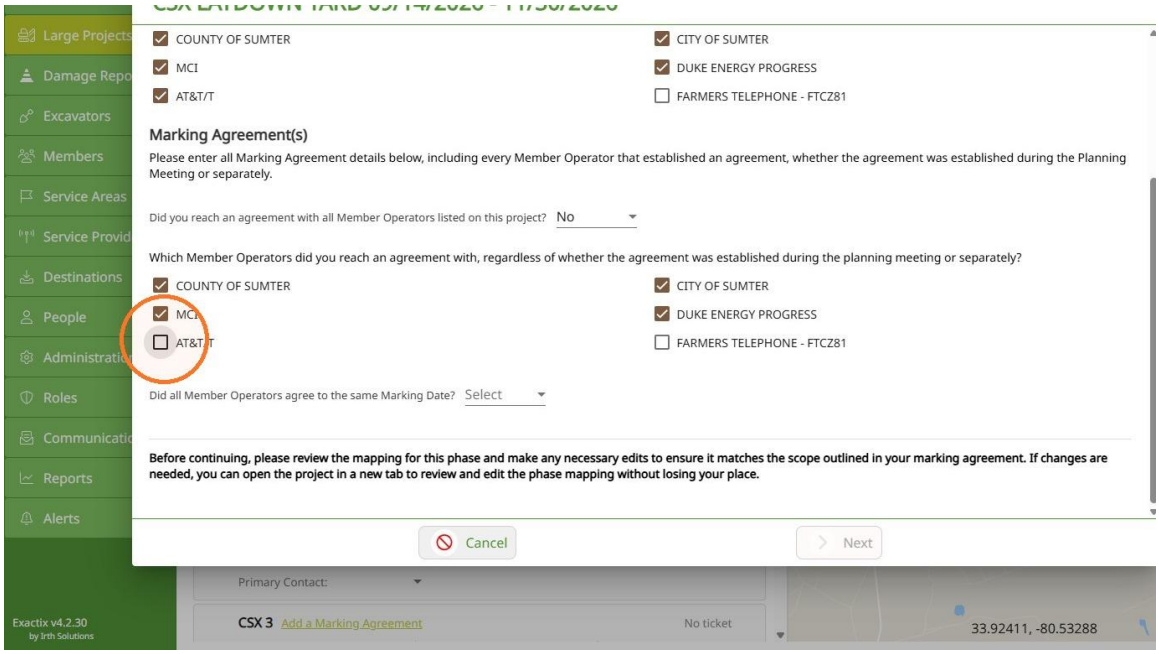


113. After selecting all Member Operators who attended the meeting, answer the question: **"Did you reach an agreement with all members listed on this project?"**

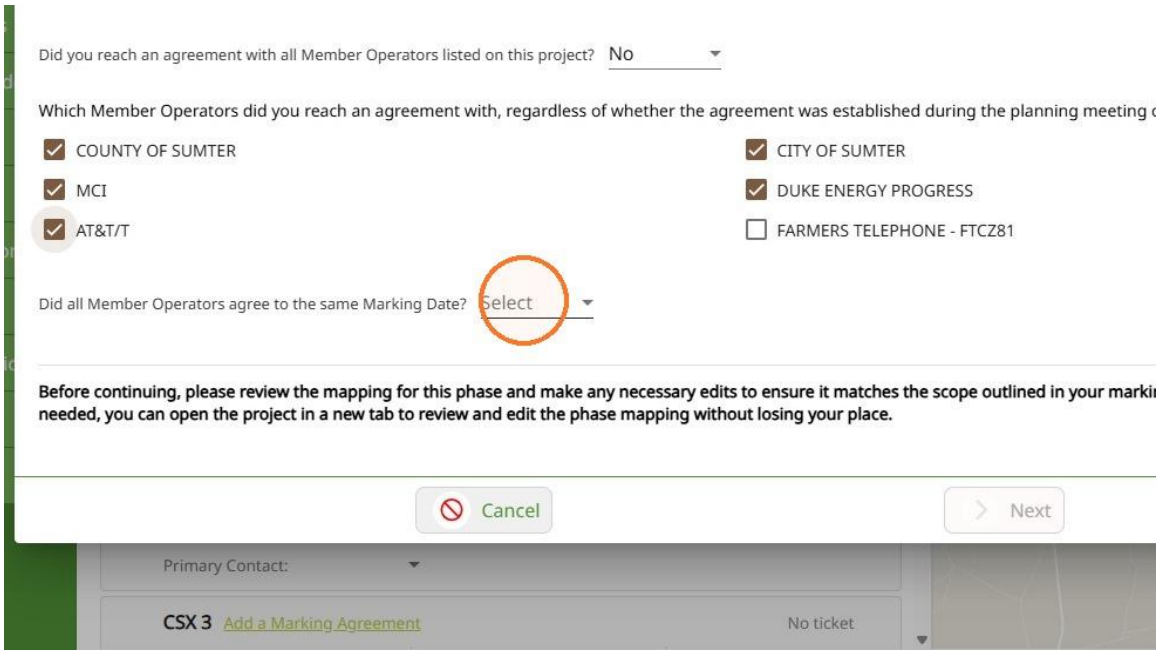
- Select **"Yes"** only if every Member Operator listed for the phase agreed to a marking date. The agreed-upon dates may be different, and agreements may have been reached during the planning meeting or separately.
- Select **"No"** if any listed Member Operator did not agree to or establish a marking date. Meeting attendance and agreement status are recorded separately. A Member Operator may have reached an agreement without attending the meeting, or may have attended without reaching an agreement.



114. If you select **"No,"** an additional question will appear. You will need to select only the Member Operators you reached an agreement with during a planning meeting or separately.

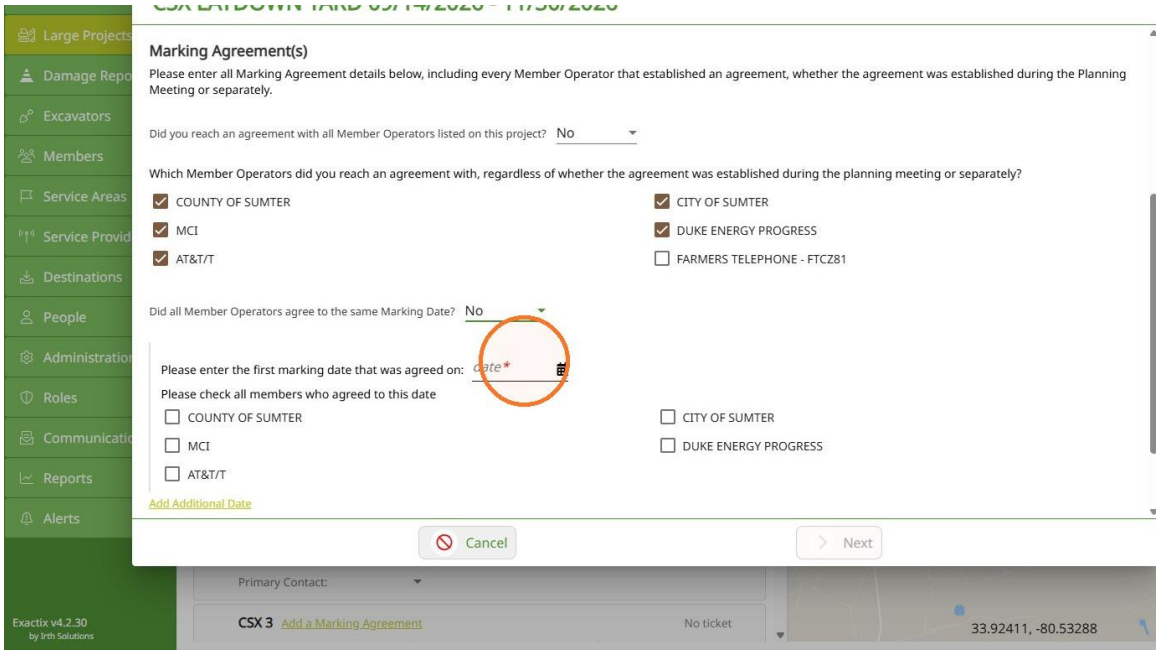


115. Next, you will enter the marking date(s) agreed upon. To do this, answer the question "Did all Member Operators agree to the same marking date?"
Select **Yes** if all Member Operators agreed to the **same** marking date.
Select **No** if the Member Operators agreed to **different** marking dates.

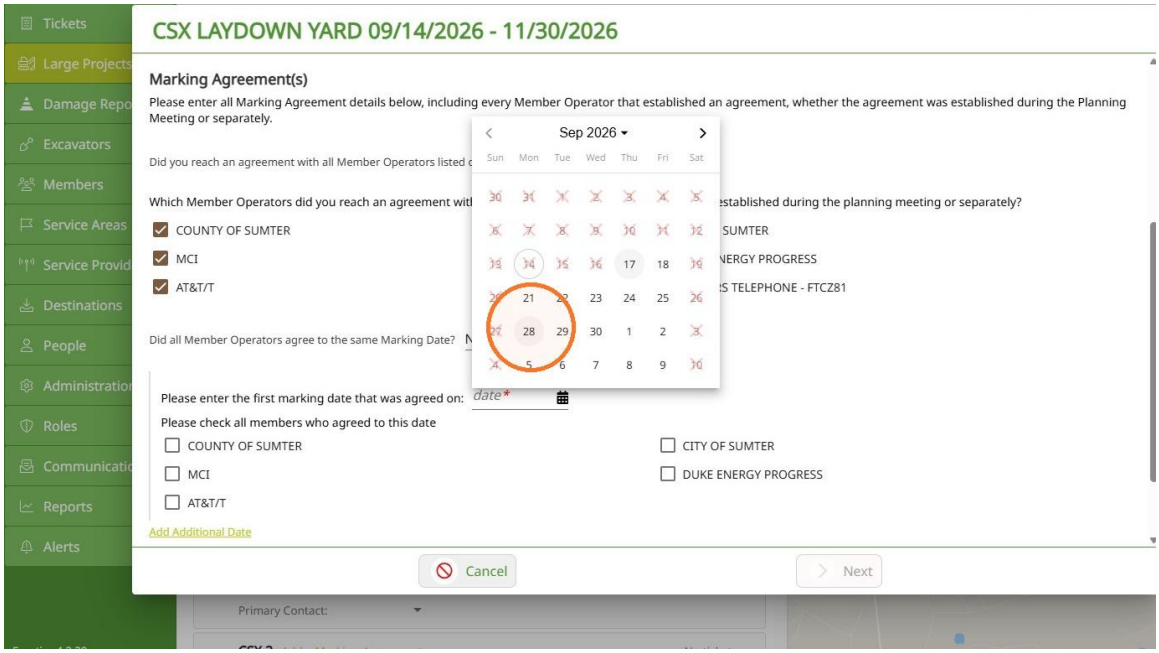


116. If you select **"Yes,"** you will only need to enter the **marking date** that was determined during the planning meeting.
If you select **"No,"** you will be prompted to enter a **marking date** and select the **Member Operators who agreed to that date**.

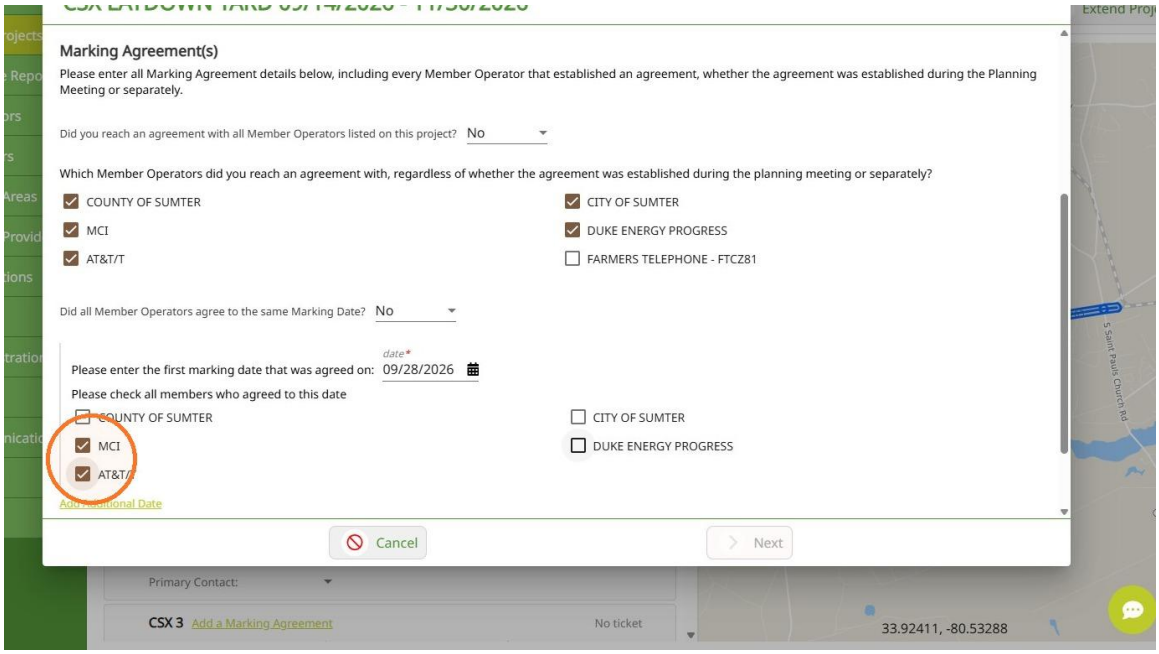
The following example walks you through the steps when you select "No" to the question "Did all Member Operators agree to the same marking date?"



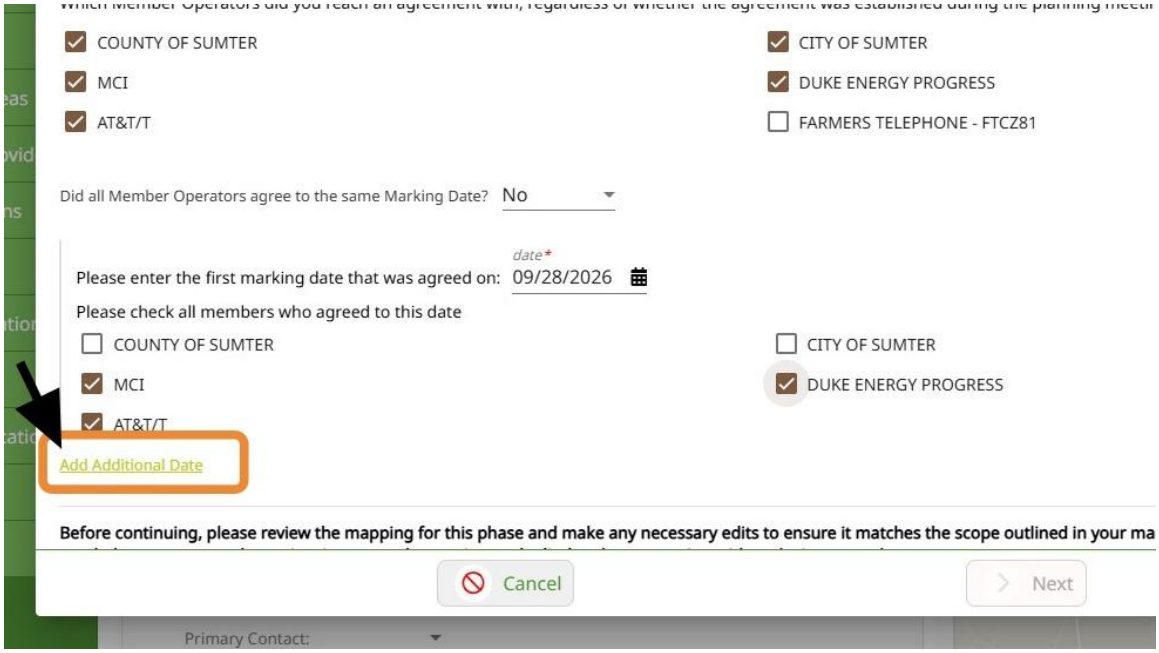
117. You can enter the date manually, or choose the Calendar option to select the date.



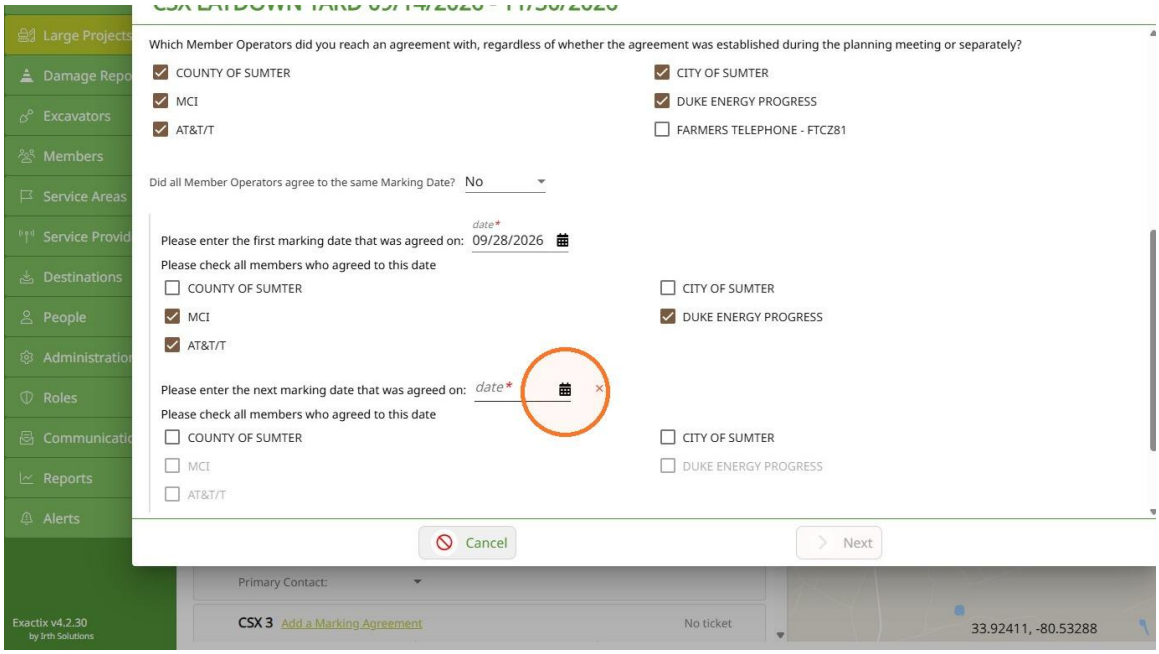
118. You will then select the Members that have agreed to this date.



119. Once you have selected all the Members that agreed to this date you will click the 'Add Additional Date' option.

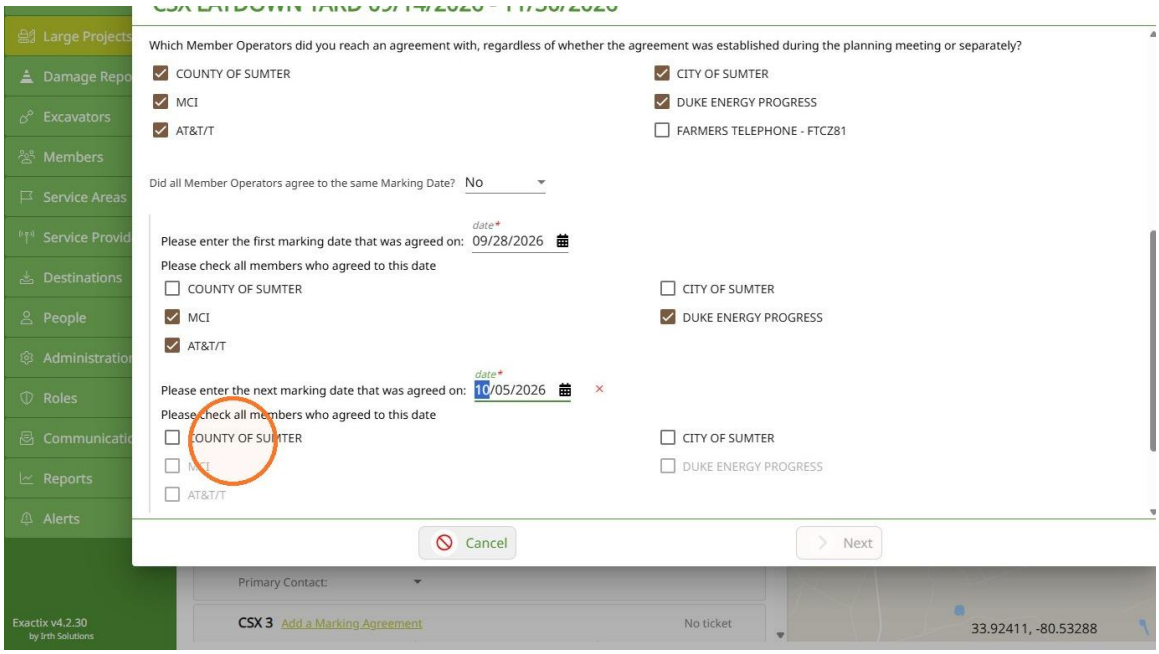


120. The field to enter a date will appear again.

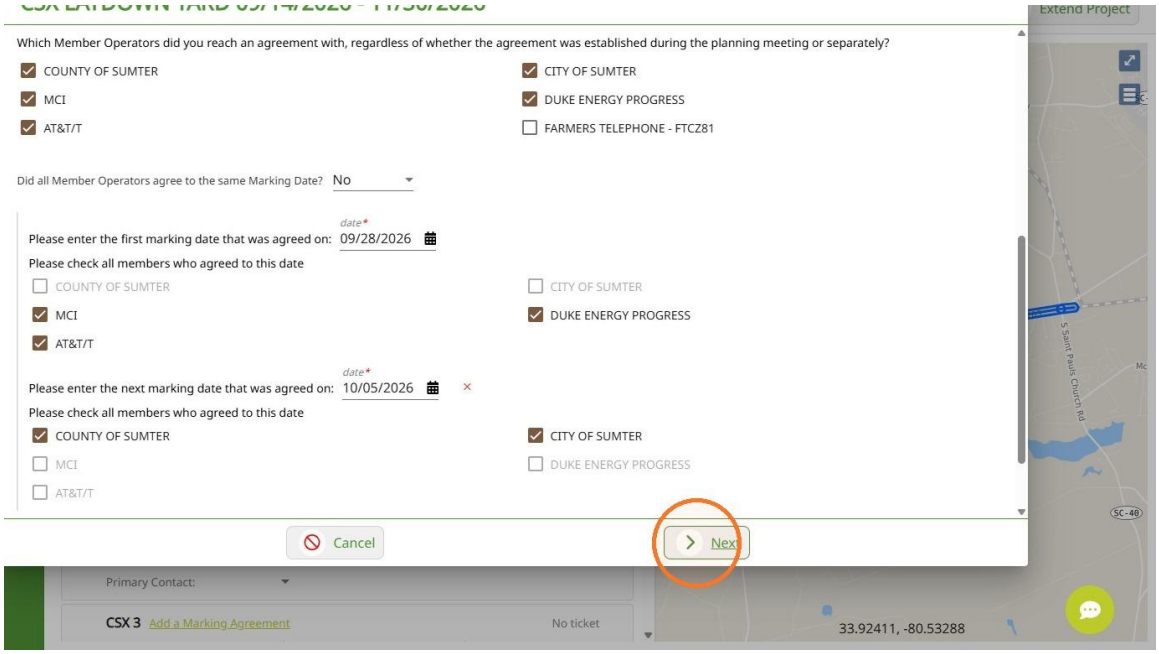


121. Once the date is selected you will choose the Members that agreed to this date.

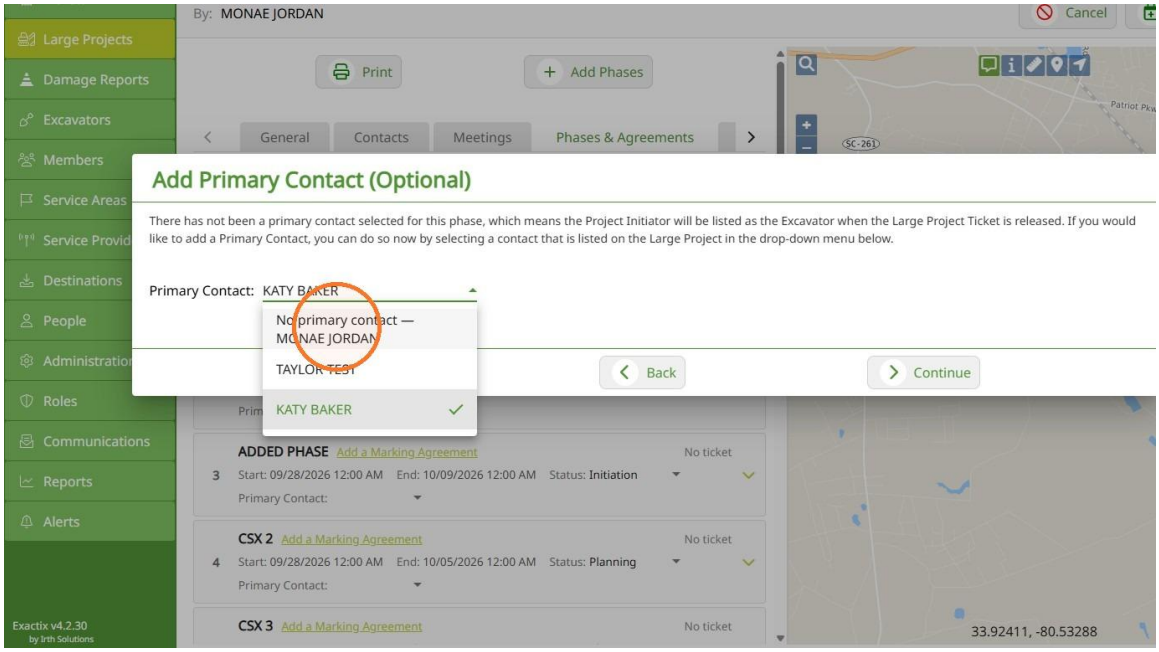
Please note once you have selected a Member for a date they cannot be chosen again in the same phase for a different date. The member will be greyed out and unable to be selected.



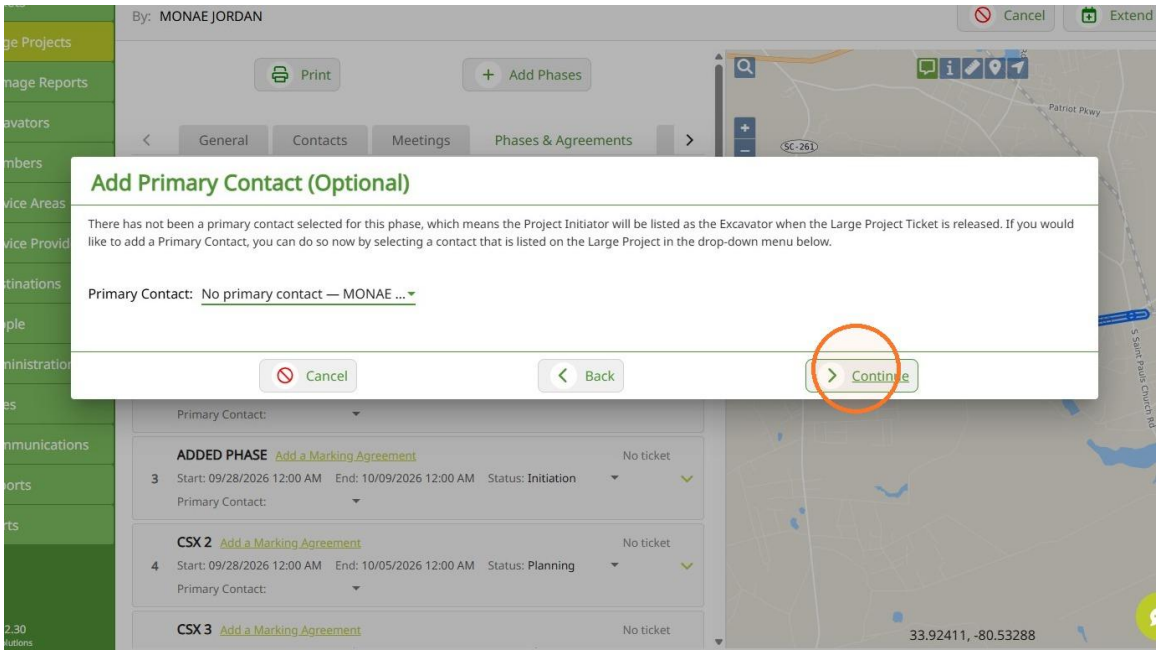
122. You will click the 'Next' button to continue.



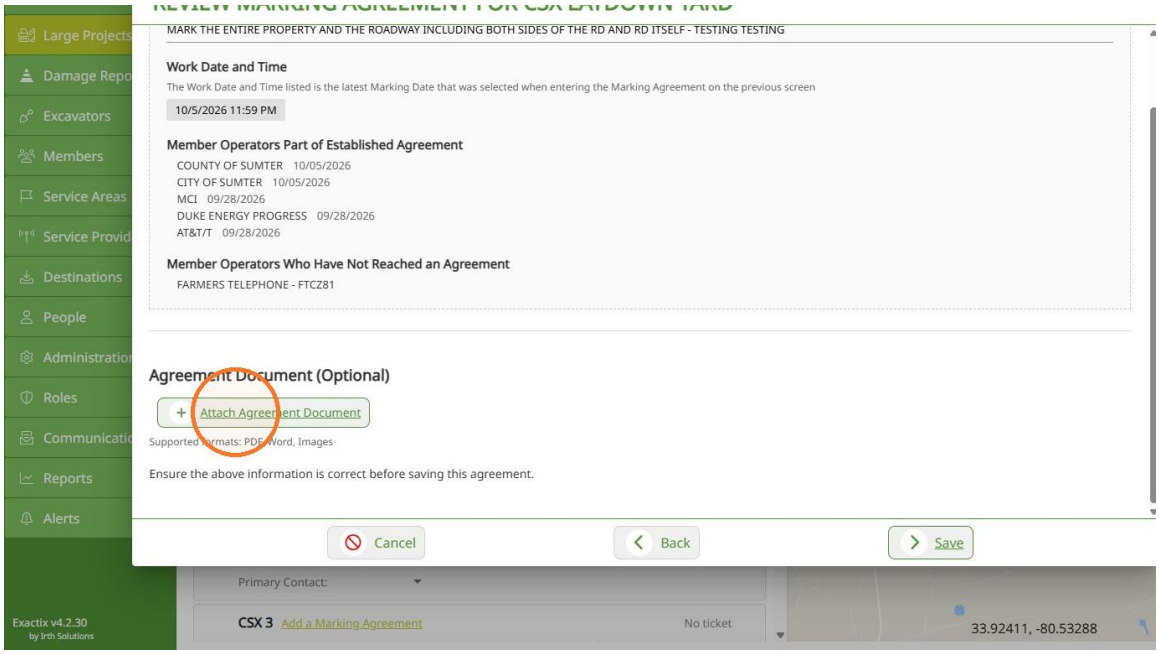
123. If a primary contact has not already been selected, you may select one for the phase at this time. The primary contact will be listed as the excavator on the generated ticket.
Selecting a primary contact is optional. If no primary contact is selected, the project initiator will be listed as the excavator.



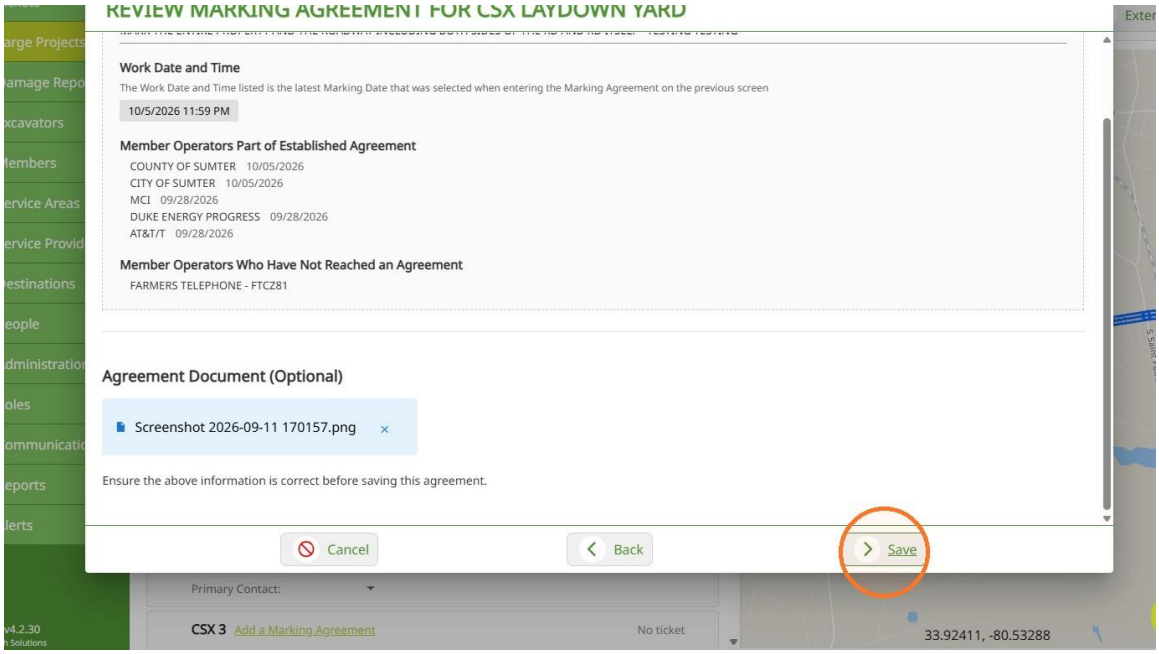
124. Once selected, you will click "Continue"



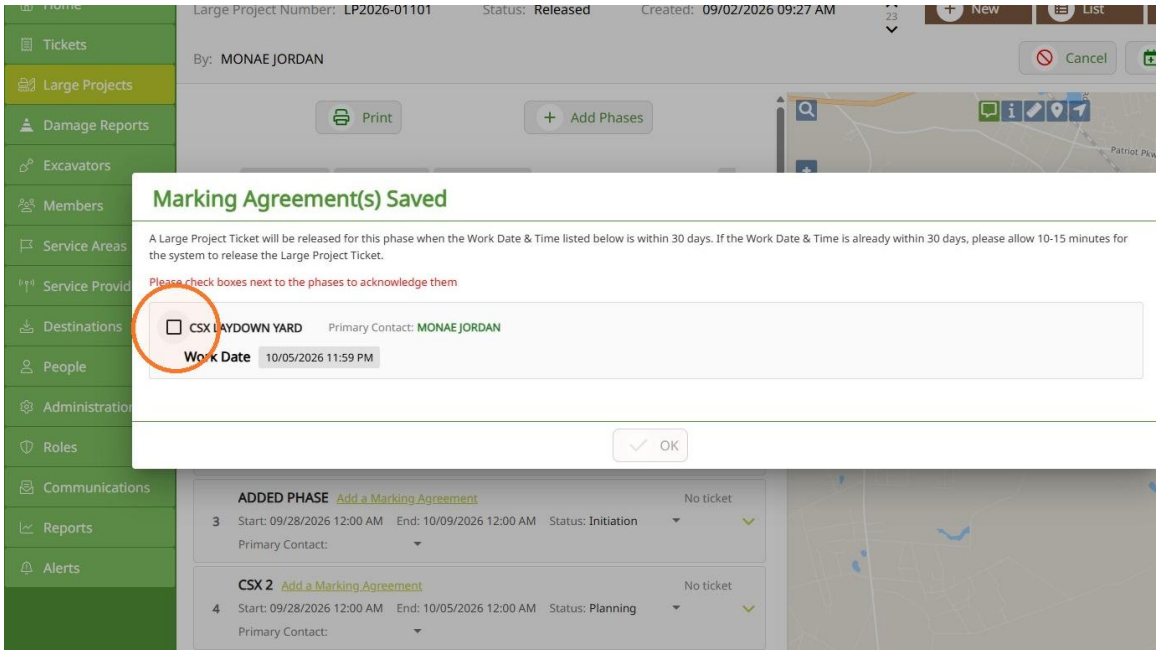
125. In the next pop-up window, you may attach documentation related to the agreement by selecting **"Attach Agreement Document."**
This step is optional. Attachments may be added at any time during the life of the project.



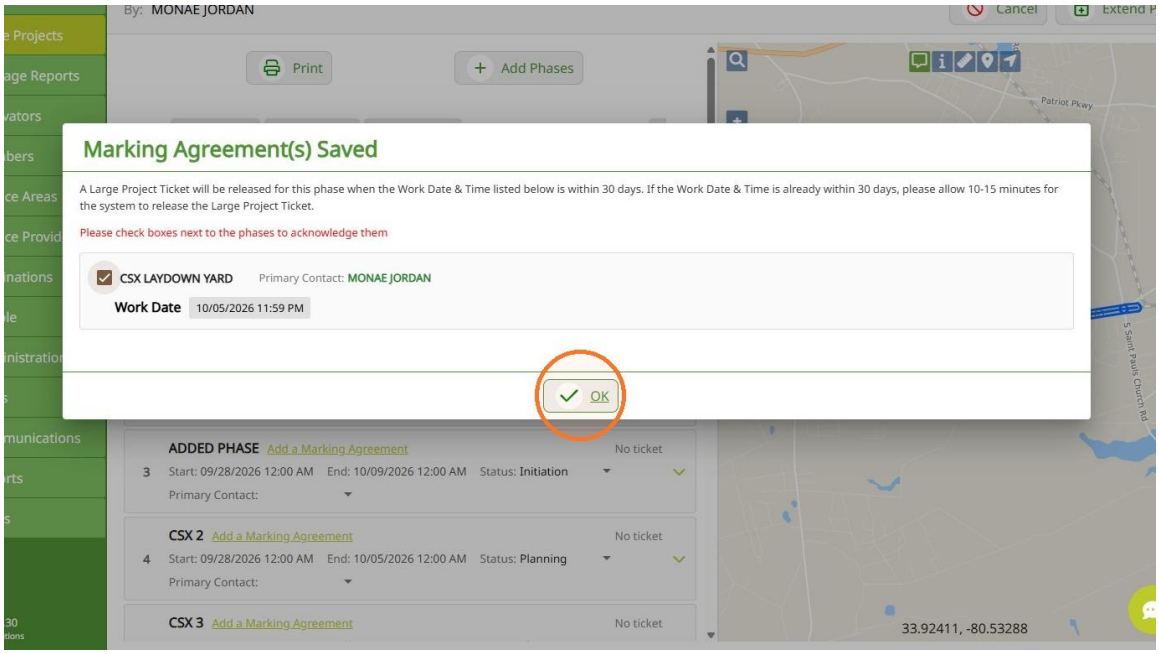
126. Once you have completed everything you will click "Save"



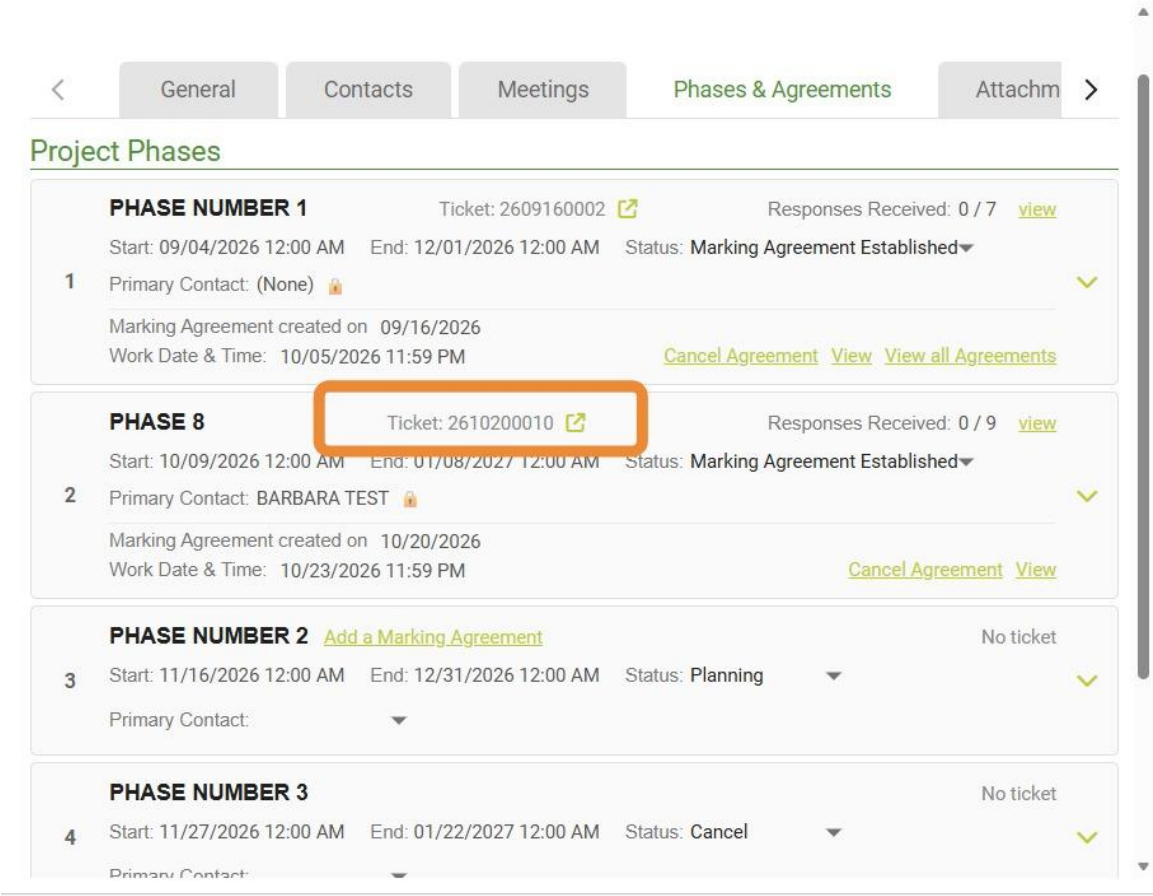
127. After selecting **"Save,"** a confirmation screen will appear. Select the checkbox next to the phase for which you created the marking agreement.
Read the entire confirmation section carefully. The ticket for the selected phase will be released within 10–15 minutes if the scheduled work date and time are within the next 30 days. If the work date is more than 30 days away, the ticket will be generated once the work date falls within the 30-day window.



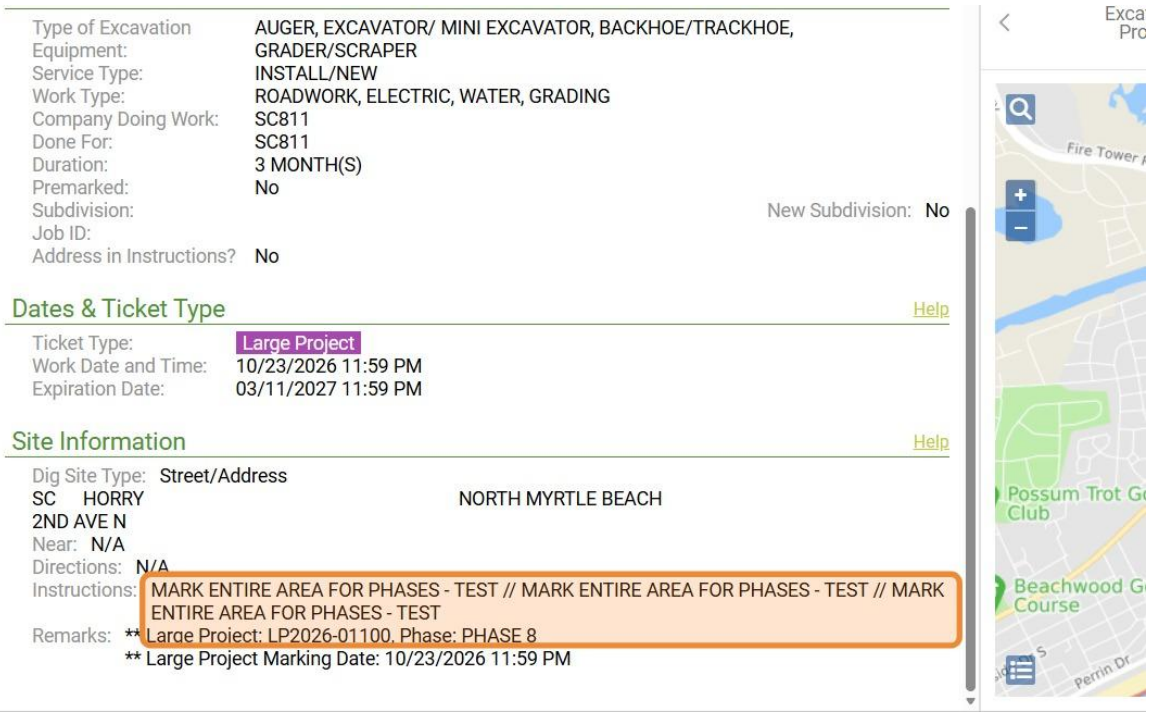
128. Then you will click the 'OK' to finalize this phase agreement.



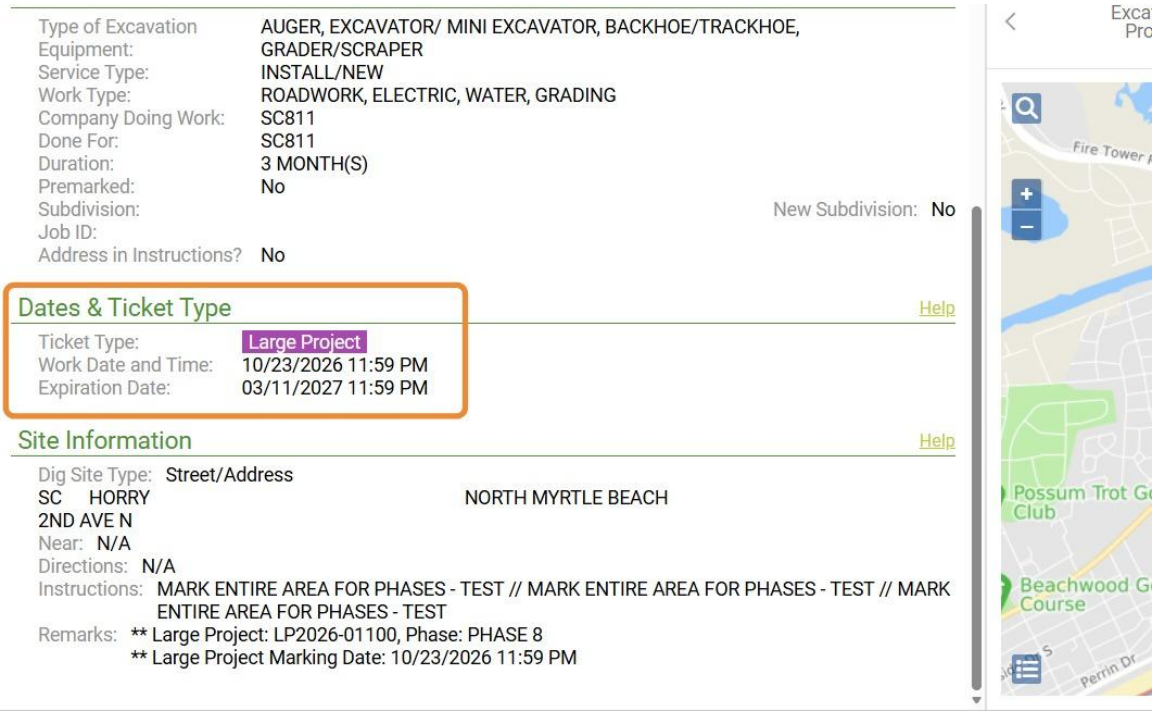
129. Once the Marking Agreement has been uploaded, you will be able to view it on the **Phases & Agreements** tab. This section will also display the ticket once it has been released, with a direct link to access it.



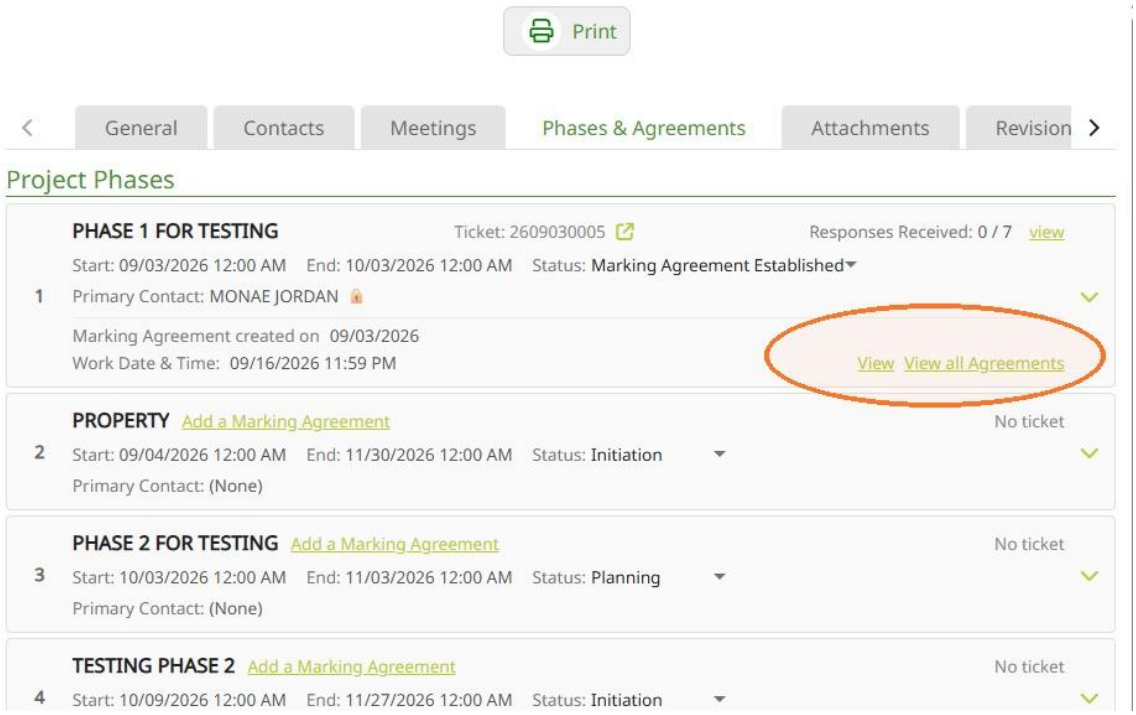
130. Click the link to access the ticket. Once the ticket is open, the information you entered in the **'Locate Instructions'** field for the Marking Agreement will appear in the **'Marking Instructions'** section of the ticket.



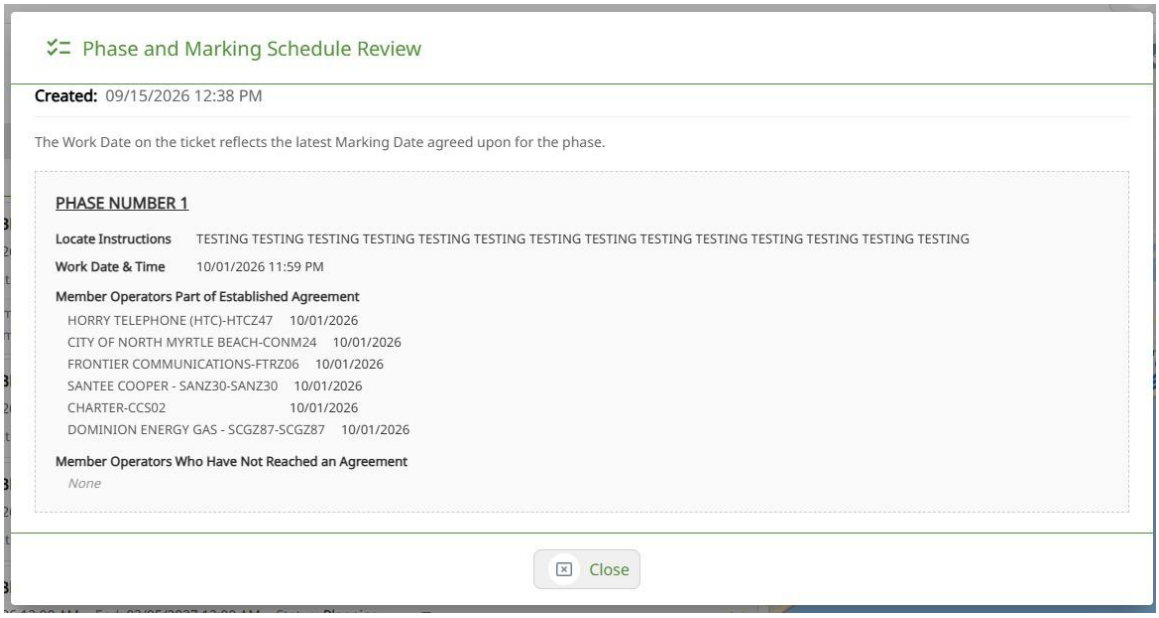
131. Tickets will generate with an expiration date of 90 business days. If the project or phase will extend beyond 90 days, an Extension will need to be processed for each ticket that still has active excavation in process.



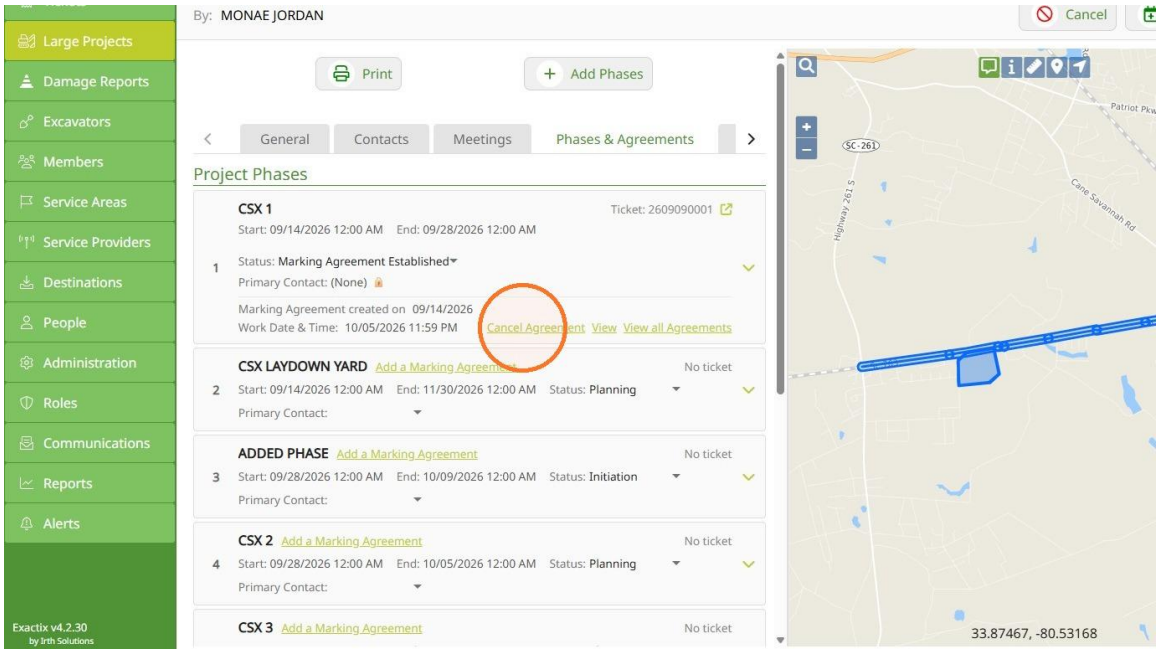
132. Marking agreements can be viewed at any time by navigating to the **Phases & Agreements** tab and selecting **View** next to the applicable agreement. You can choose to **View** for one phase or **View All Agreements** for all phases.



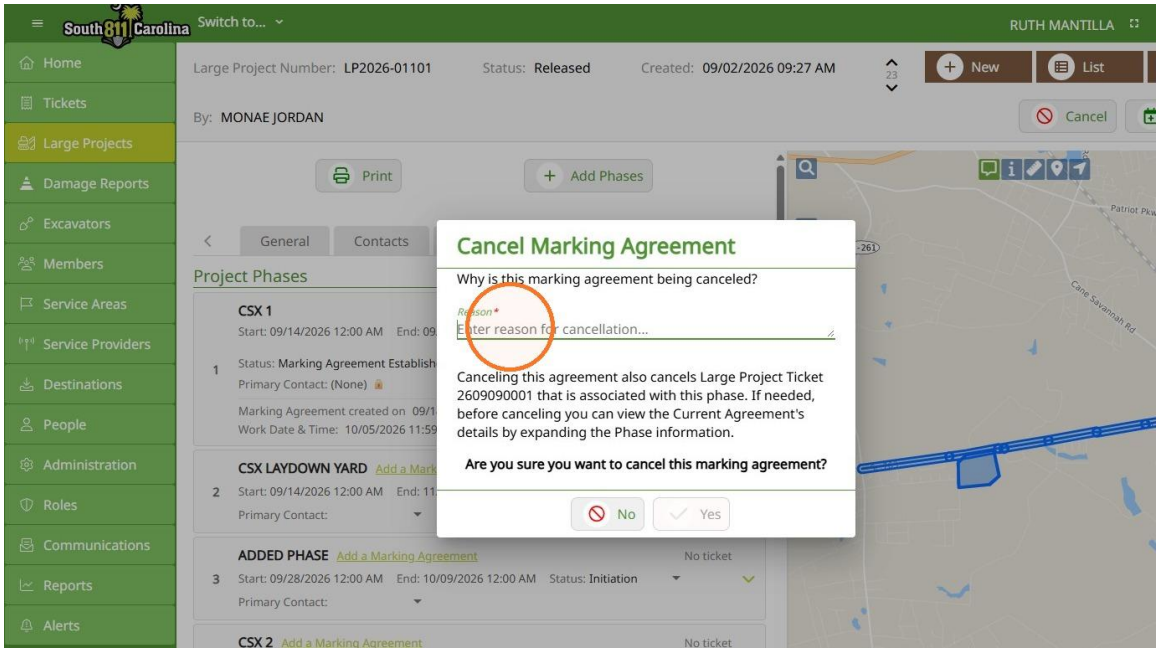
133. The agreement will open, allowing you to scroll through and review the full details.



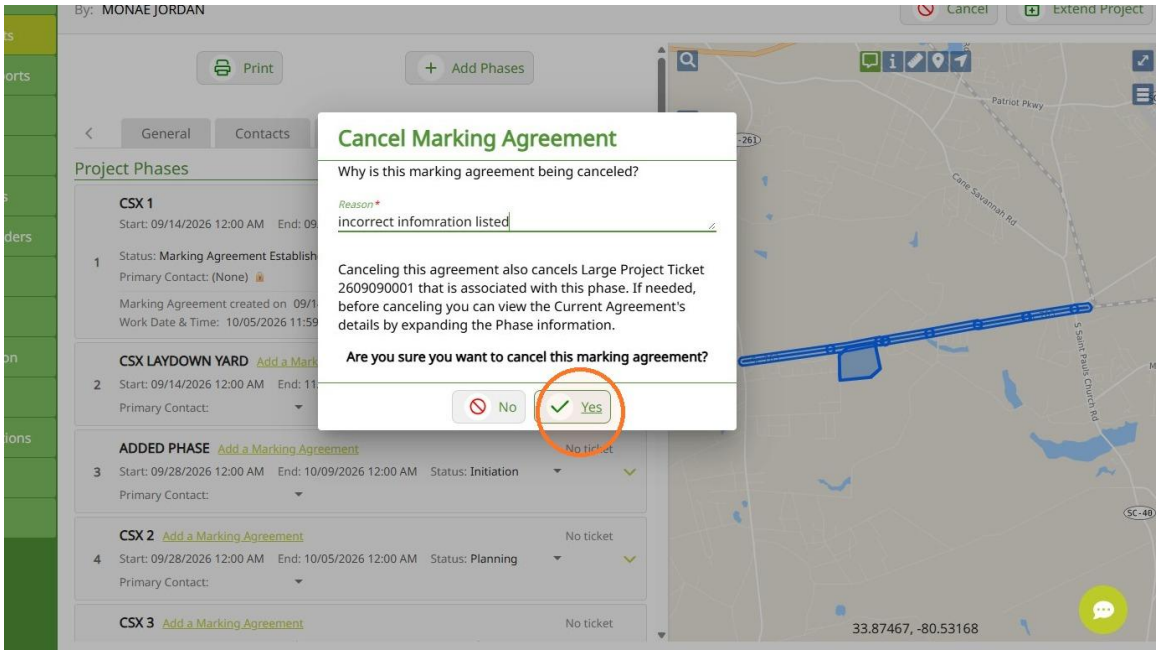
134. If an agreement is incorrect or invalid, select **“Cancel Agreement.”** This cancels the agreement and allows a new one to be added.
Note: If a ticket has already been generated for the phase, canceling the agreement will also cancel the ticket and unlink it from the project.



135. You will fill in the reason you need to cancel the marking agreement in the "Reason" field.

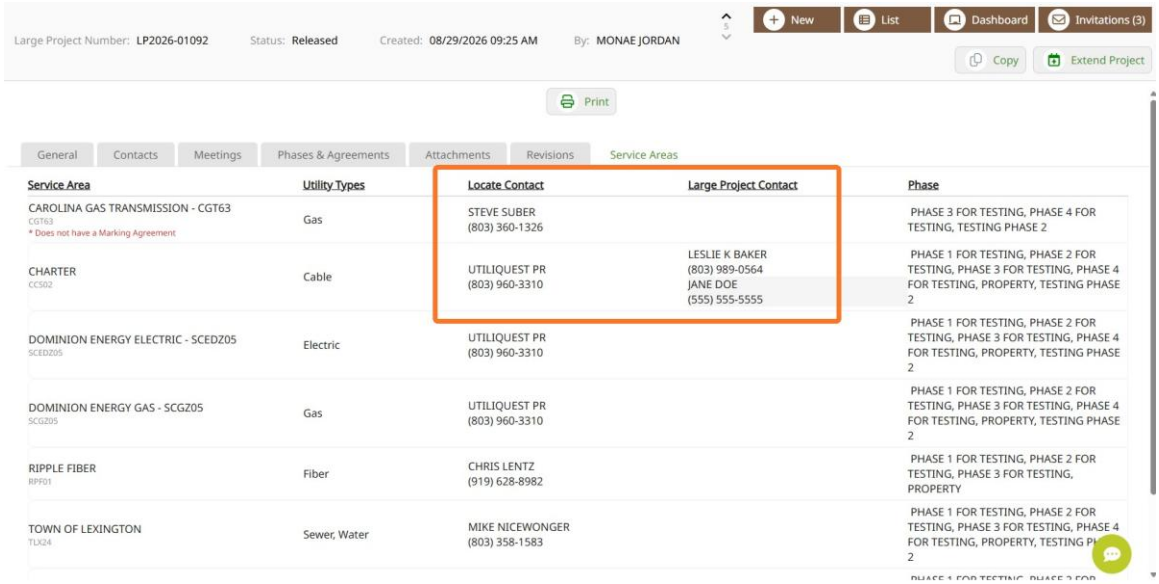


136. You will click "Yes" to cancel the agreement.



Important: If excavation is underway, cancelling the agreement will also cancel the associated ticket. Excavation must stop and cannot resume until a new ticket has been generated and the required positive responses have been received.

137. The **Service Areas** tab displays all affected Member Operators, along with the assigned locate contact and Large Project contact for each impacted service area.

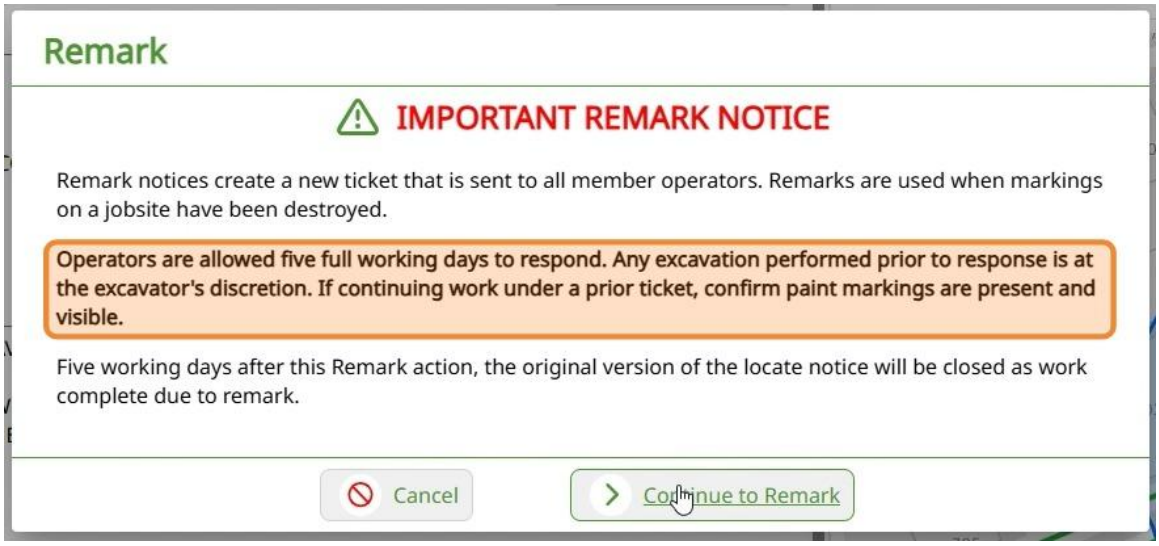


Secondary Actions

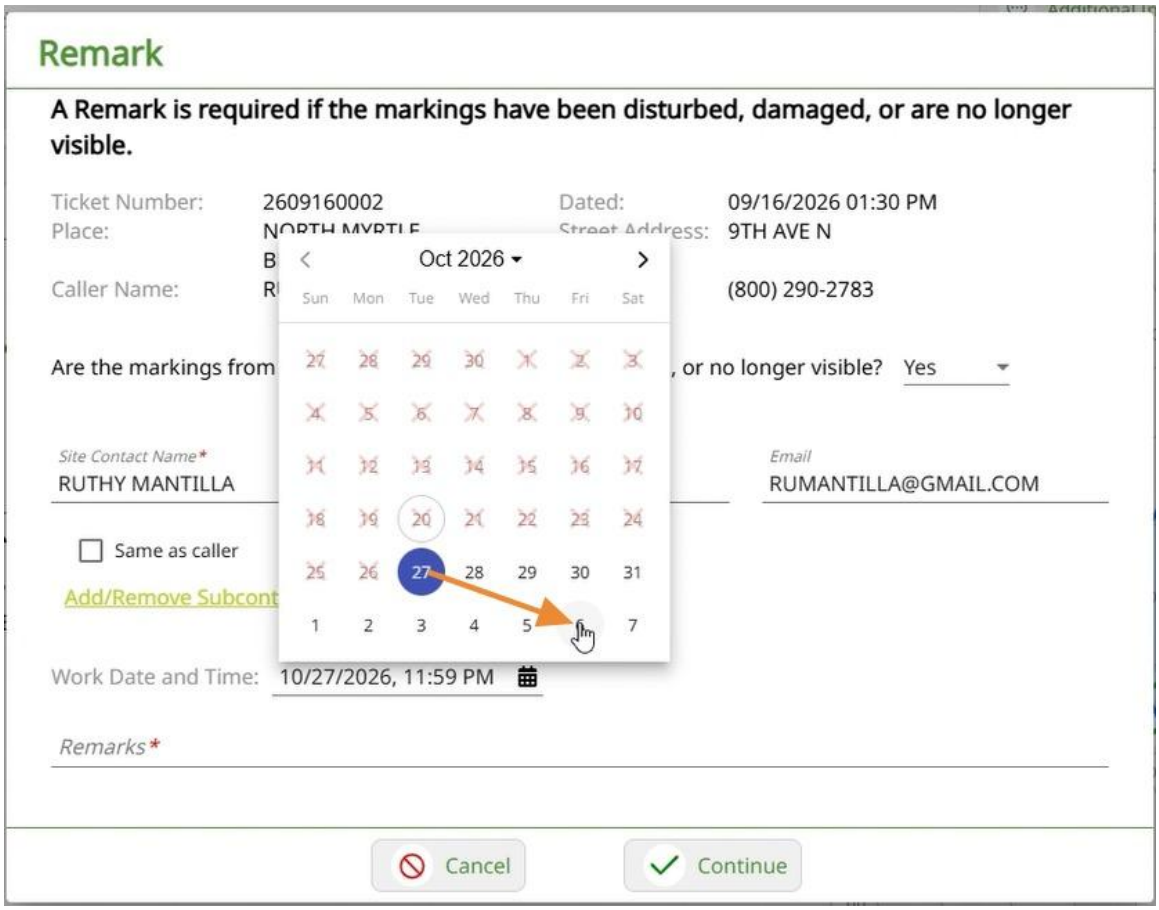
138. Secondary actions can be completed on tickets released for each phase. This section covers how to process Remarks and Extensions on Large Project tickets.

139. **Processing a Remark**

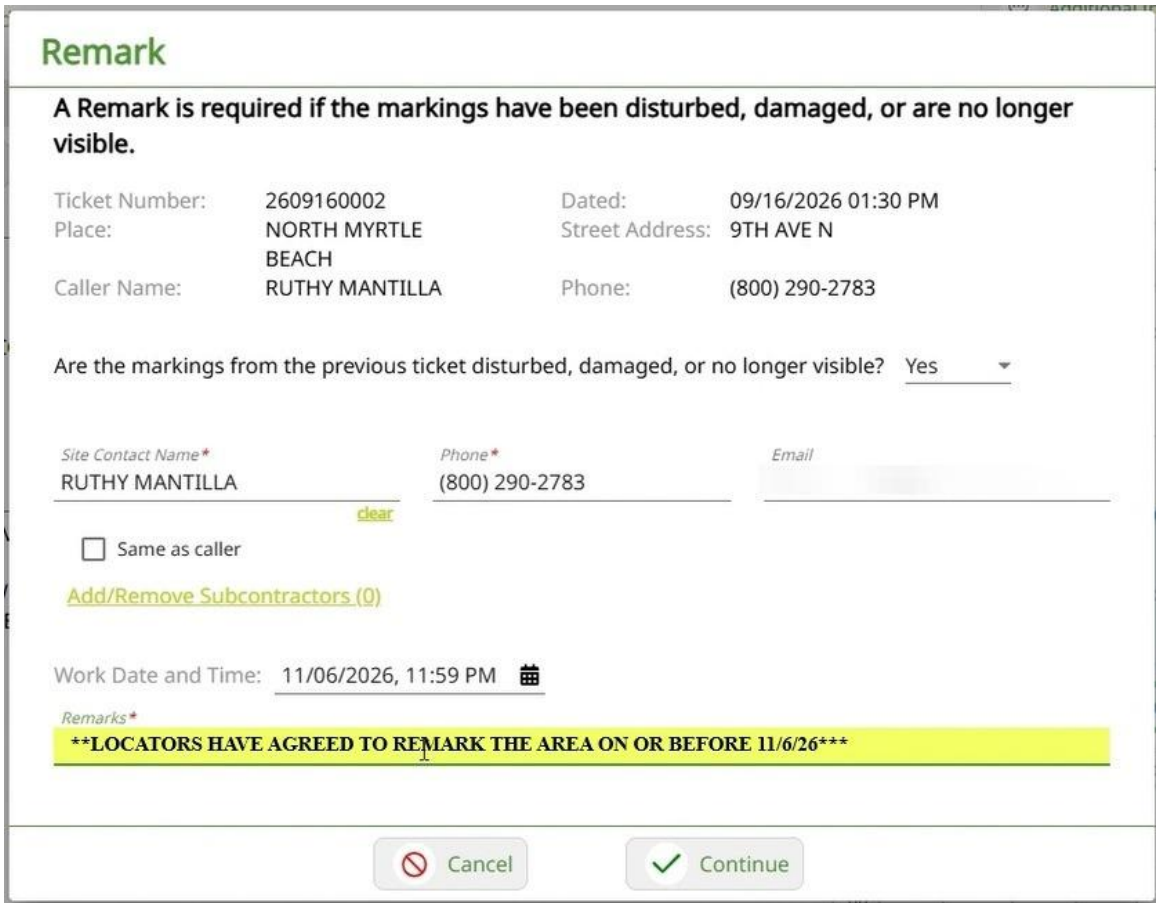
When markings have been destroyed by weather or construction, a Remark request will need to be processed. An alert will pop up letting you know that Member operators are allowed 5 full working days to respond to the Remark request.



140. The ticket will automatically default to 5 days out from the date of the request. However, if the locators are not able to mark within the 5-day time frame, the start date can be moved out to accommodate a marking schedule that is acceptable between both parties.



141. A note will need to be added to the remarks field advising of the agreed upon remark date.



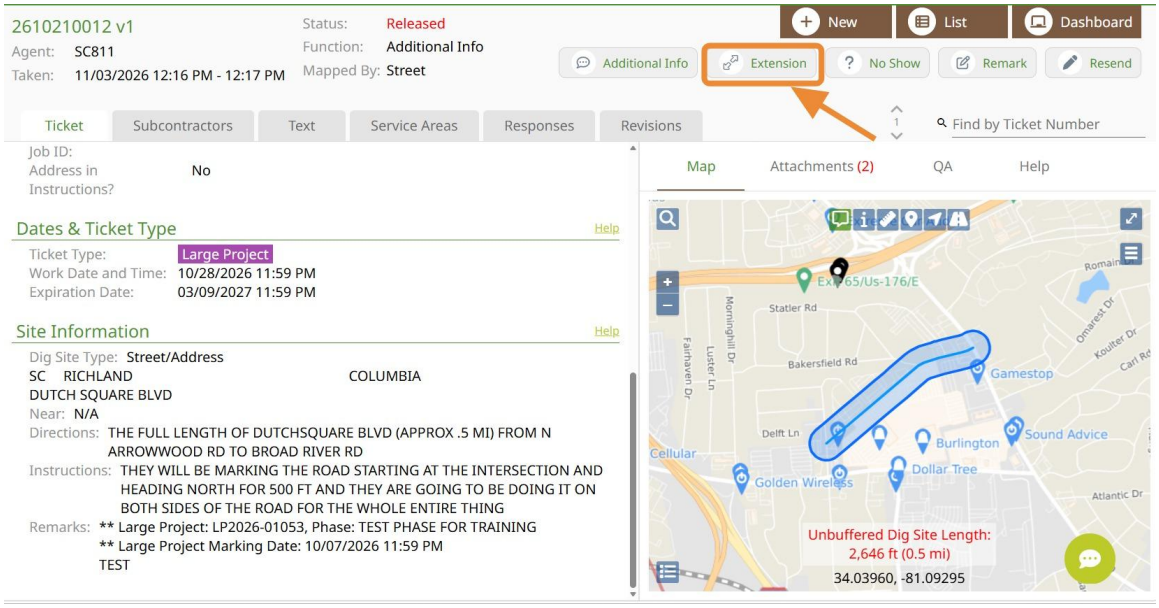
142. The Remark ticket will generate with an expiration date that is 90 business days out from the marking date.



143. **Ticket Extension**

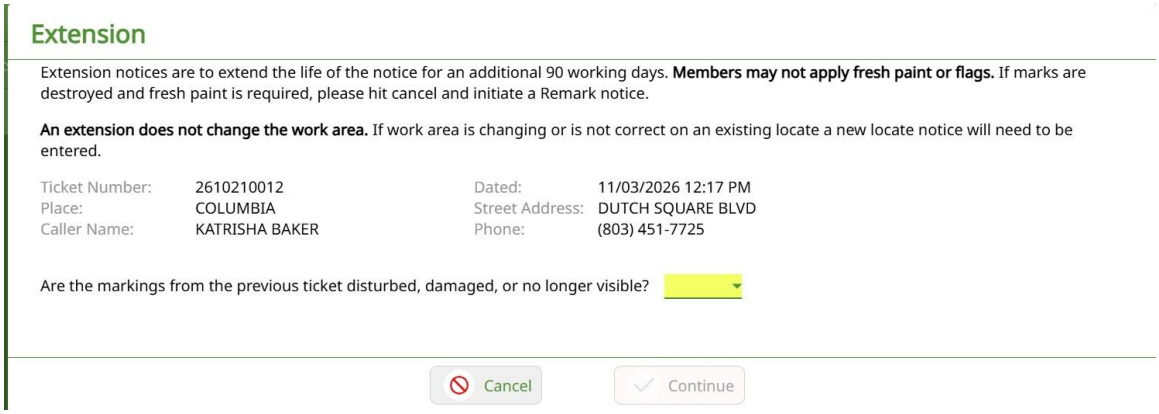
Extensions can be processed on tickets released for each phase when markings are still visible but additional time is needed to complete the work. Each extension adds another 90 days to the ticket's life.

144. Start by clicking the "Extension" button in the upper right

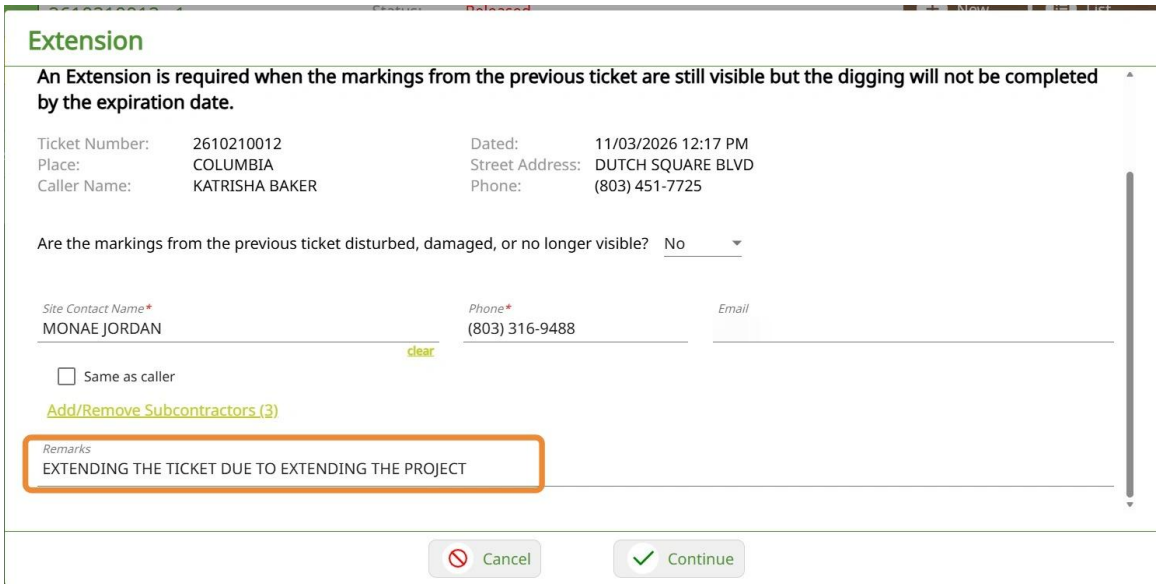


145. When the pop-up box appears, you will select 'No' as long as markings are still visible.

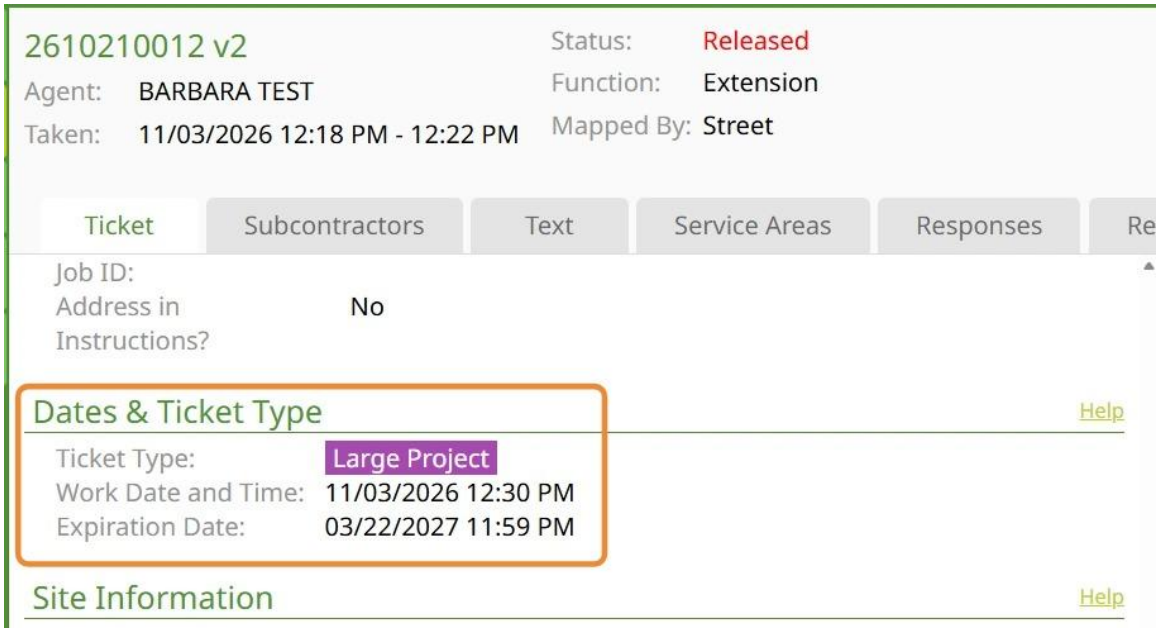
If markings are destroyed refer to the 'Remarks' section above.



146. On the remarks field you will enter a note as to why the ticket is being extended.



147. The ticket will generate with a new version and time frame of 90 business days to the expiration date.



Editing Your Existing Large Project

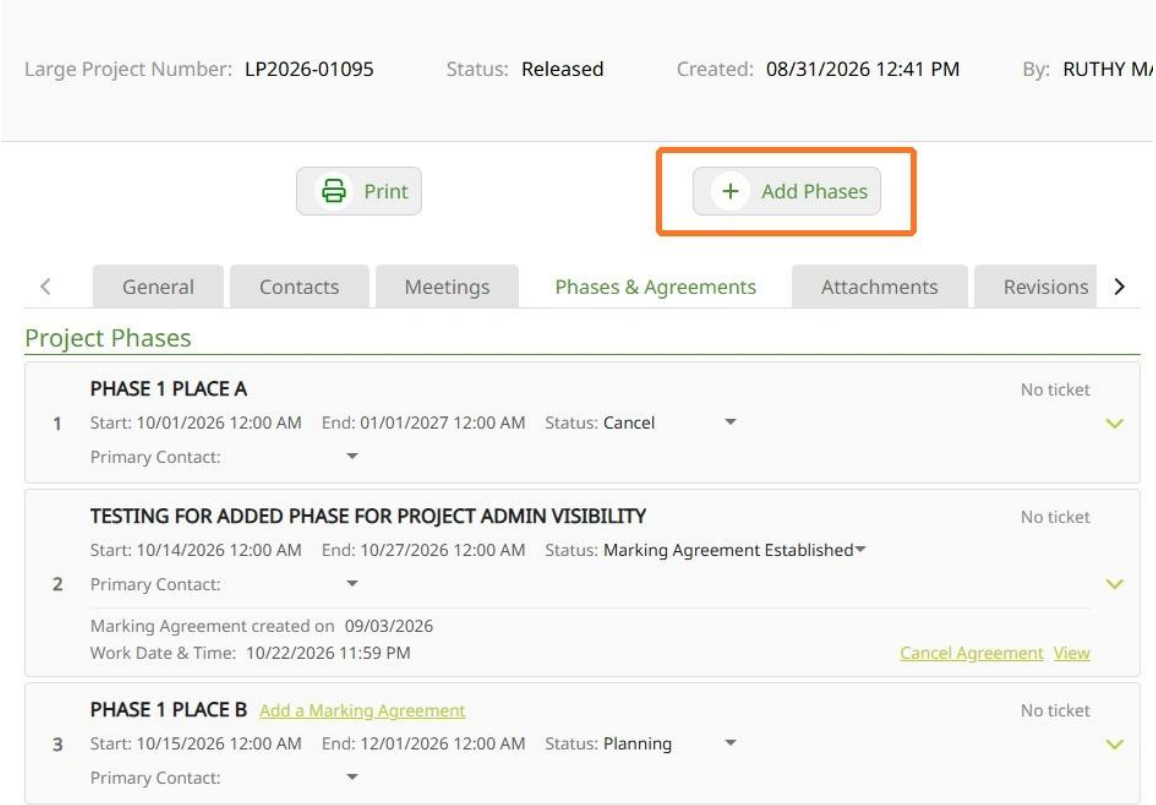
148. **Adding Phases to an Existing Project**

You can add additional phases to an existing project, even after tickets have been released on the project.

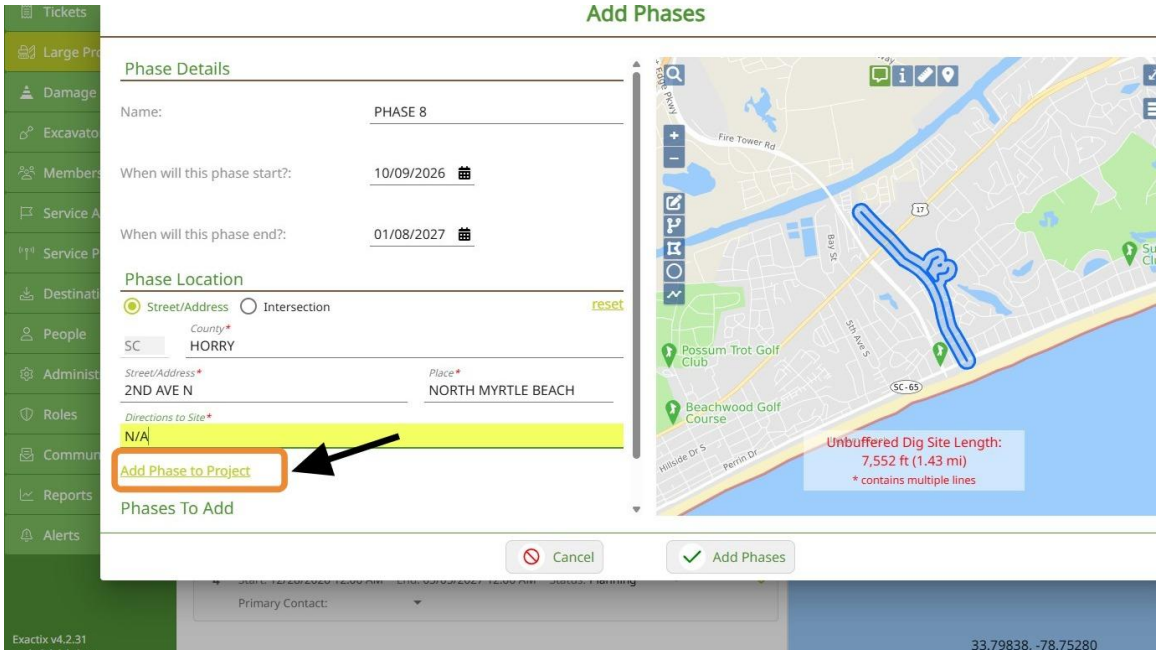
Select the **Phases** tab and then click **Add Phase**. This allows you to add additional phases to the project after a previous phase has already been released.

When adding a new phase to an existing project, you will need to manually map the new phase.

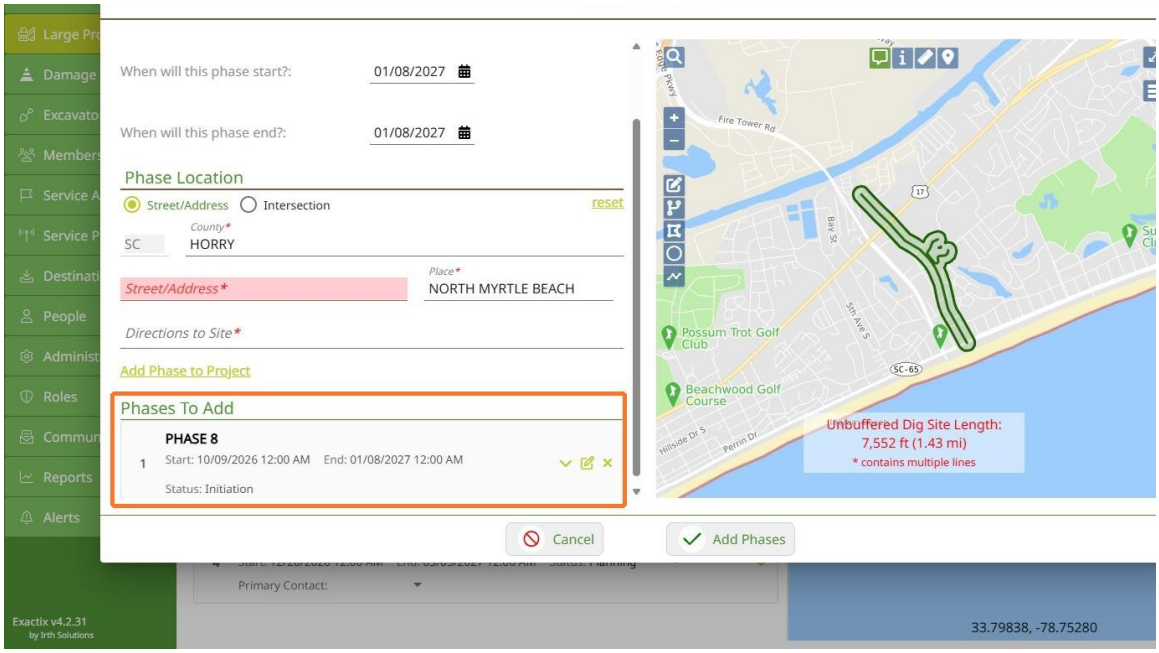
The Geo Importer cannot be used for adding additional phases.



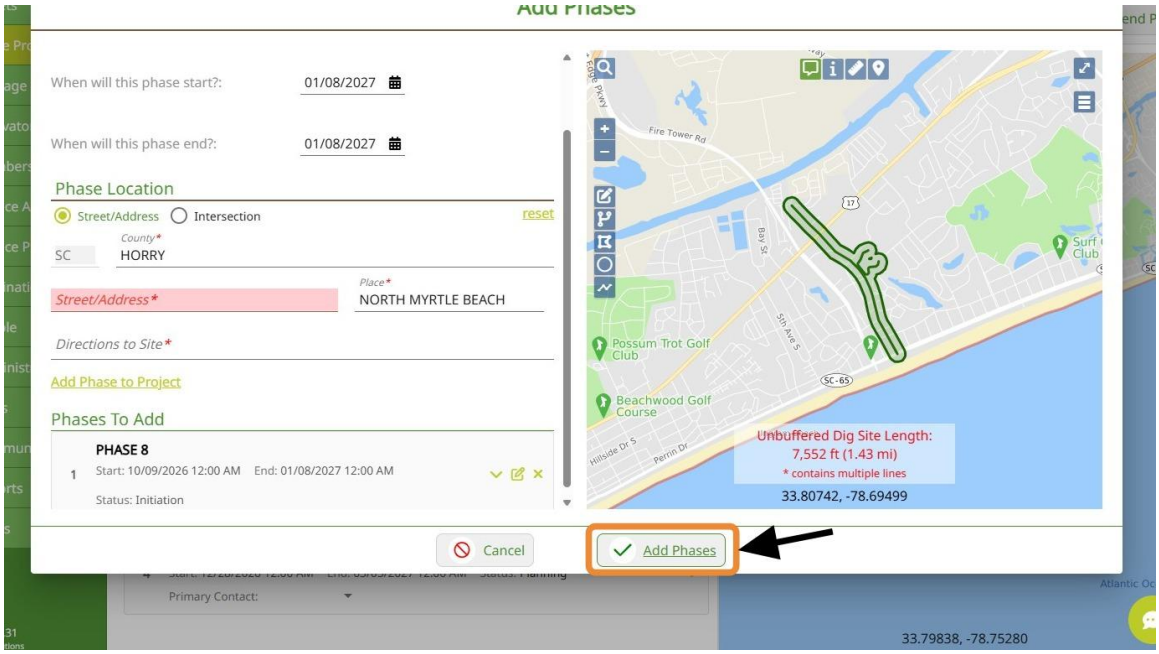
149. Once you have added all the details for the new phase you will click "Add Phase to Project" Continue this process until you have added all additional phases you need.



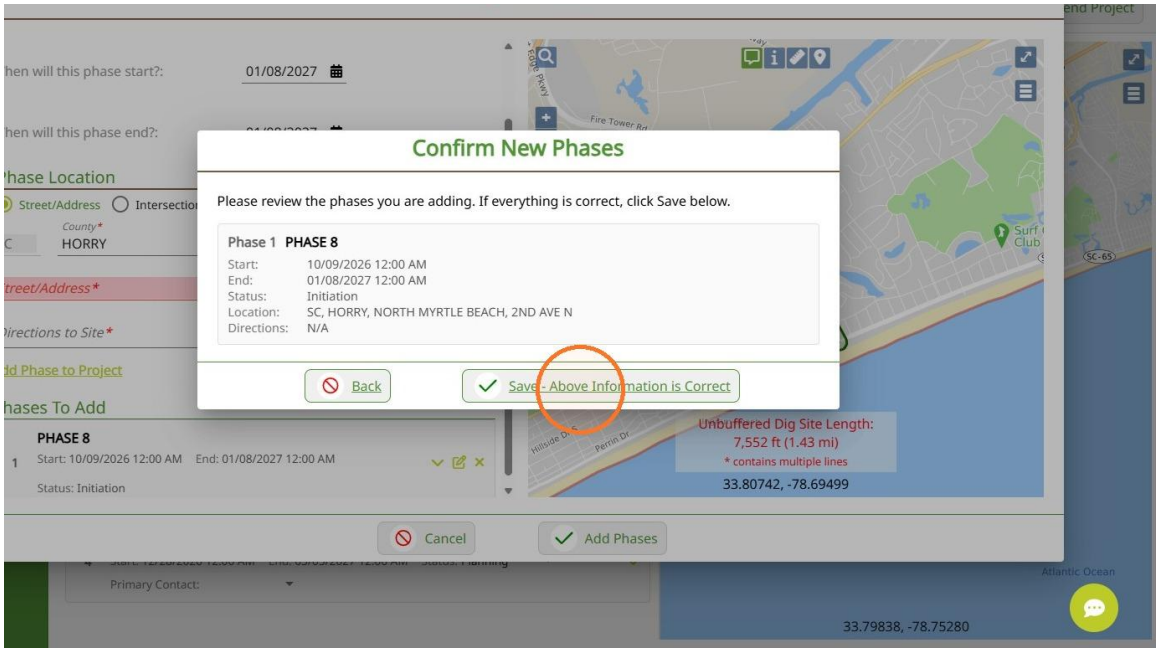
150. You can scroll down and see the phase is now listed in the 'Phases to Add' section.



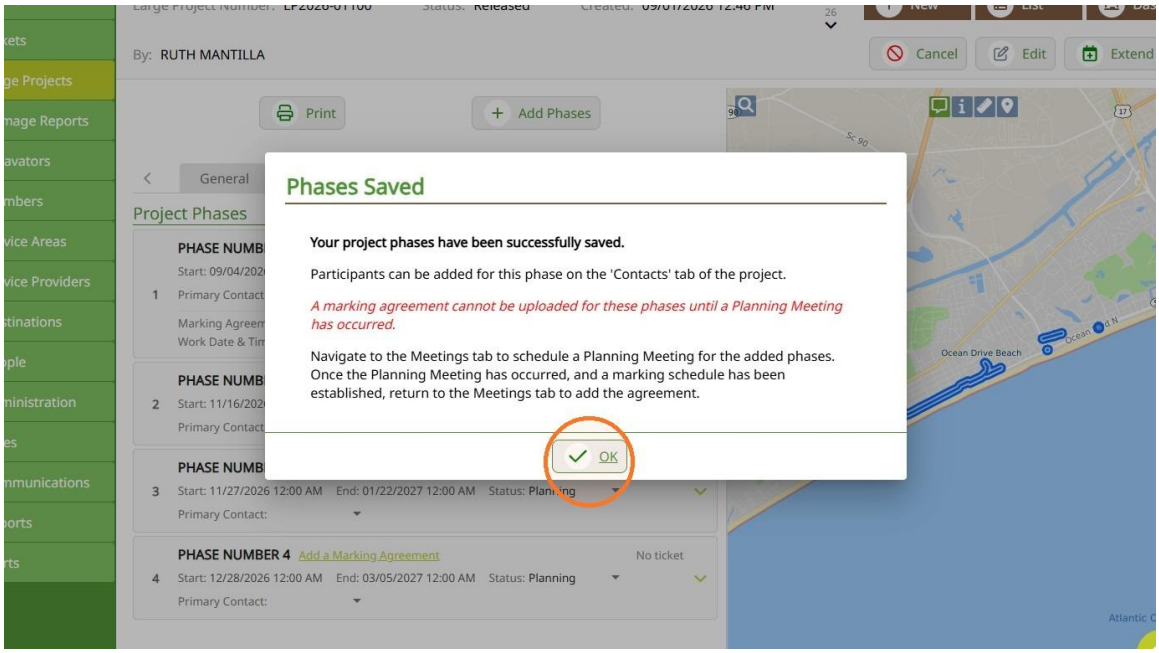
151. Once you have added the new phase(s) to the project you will click the 'Add Phases' button near the bottom of the pop up.



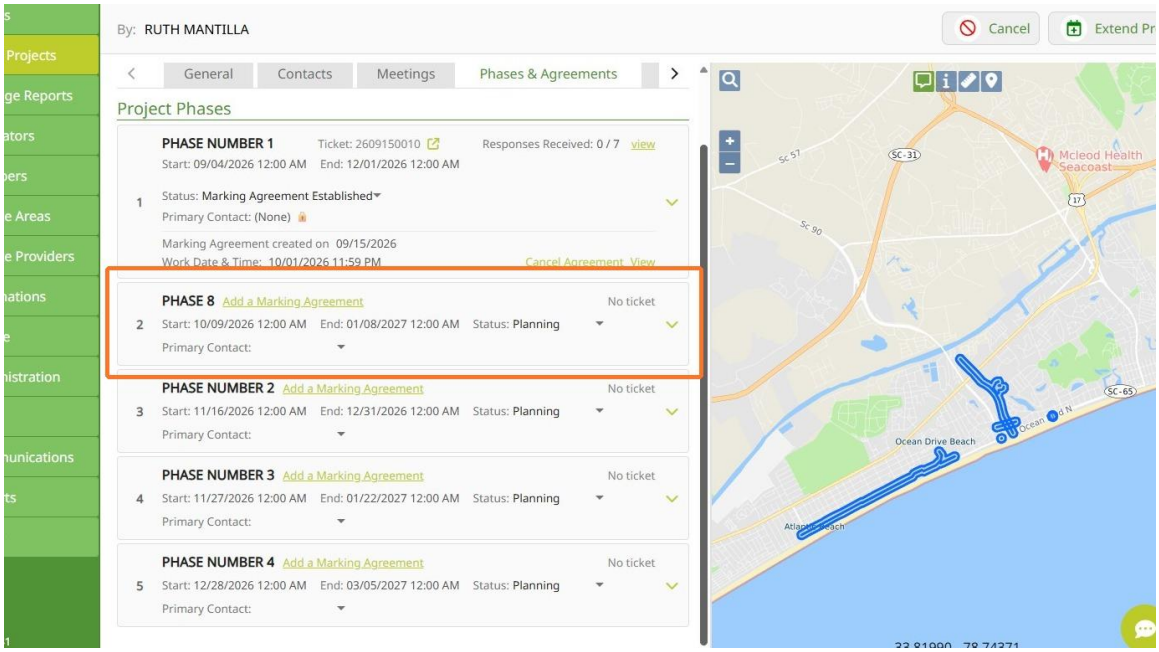
152. The next pop-up is to confirm you want to make the changes. Click "Save - Above Information is Correct" if you are ready to add the phase/s.



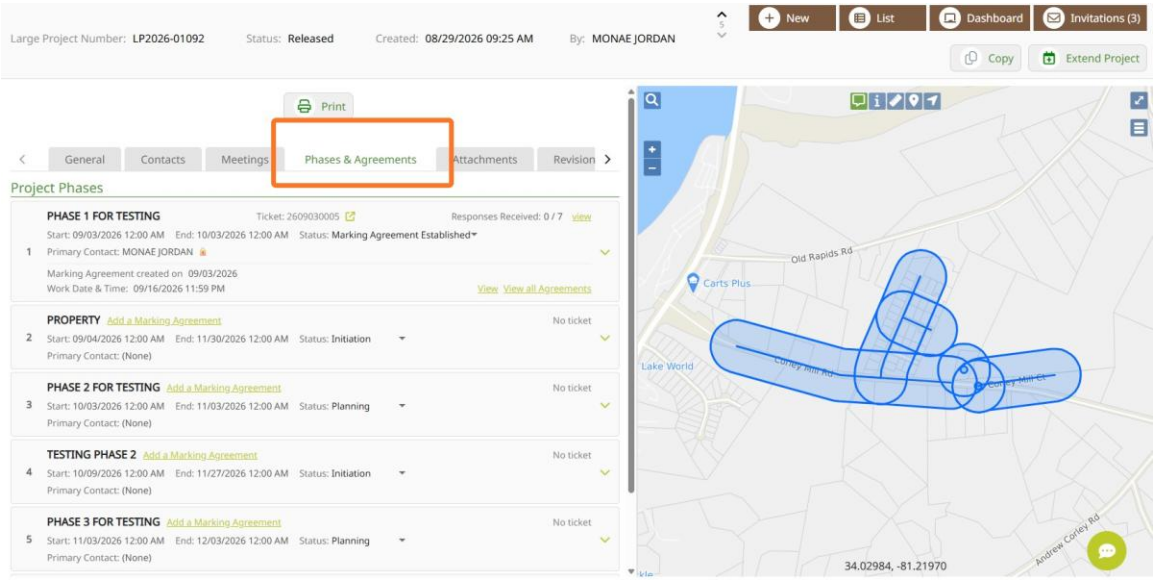
153. A disclaimer for Phases Saved will appear reading "A marking agreement cannot be uploaded for these phases until a Planning Meeting has occurred." Unless the phase was discussed in a previous meeting a new meeting will need to be held to establish a marking agreement.
You will click 'OK' to exit the pop-up.



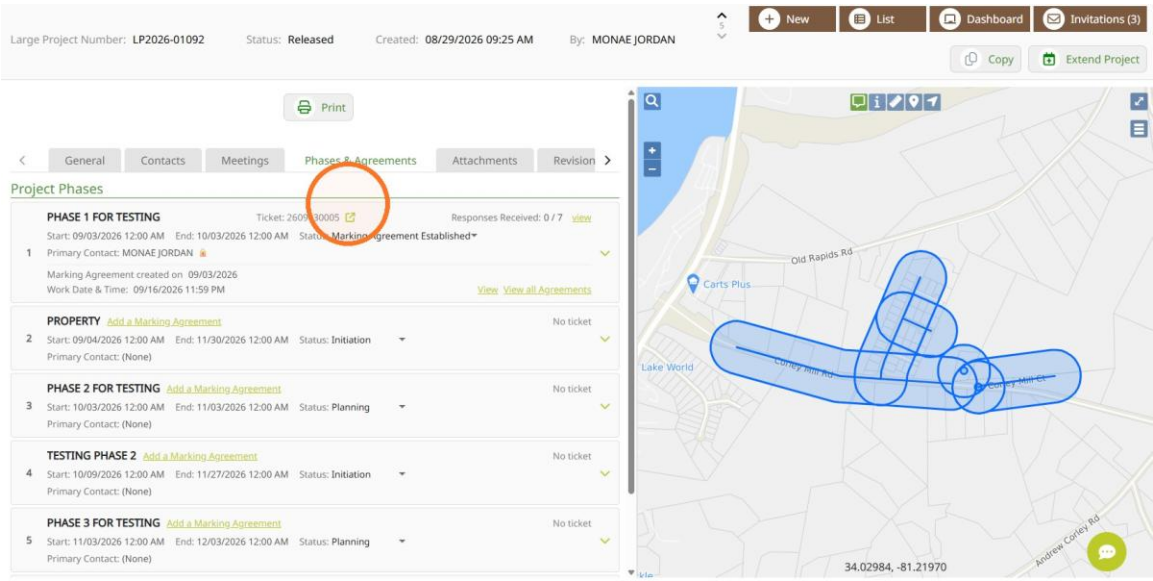
154. It will revert back to the 'Phases & Agreements' tab and you will see your new phase now listed.



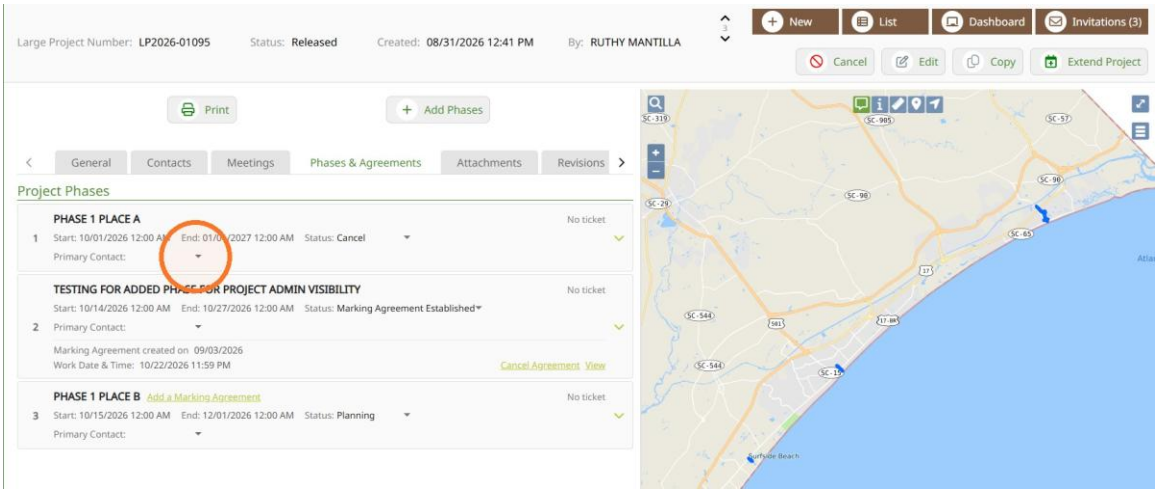
155. Within the **Phases & Agreements** tab, you can view each phase along with its current status. If available, you can also view the associated ticket numbers and the number of responses received for each phase.



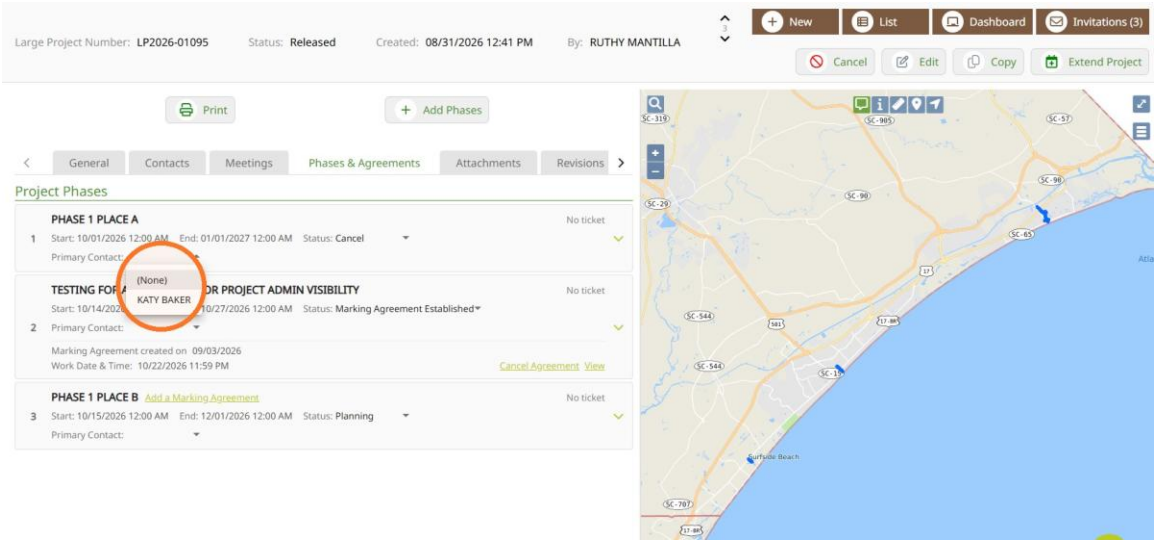
156. Clicking the link next to a ticket number will open the associated ticket. Remember that all tickets and member responses must be reviewed prior to beginning any excavation activity.



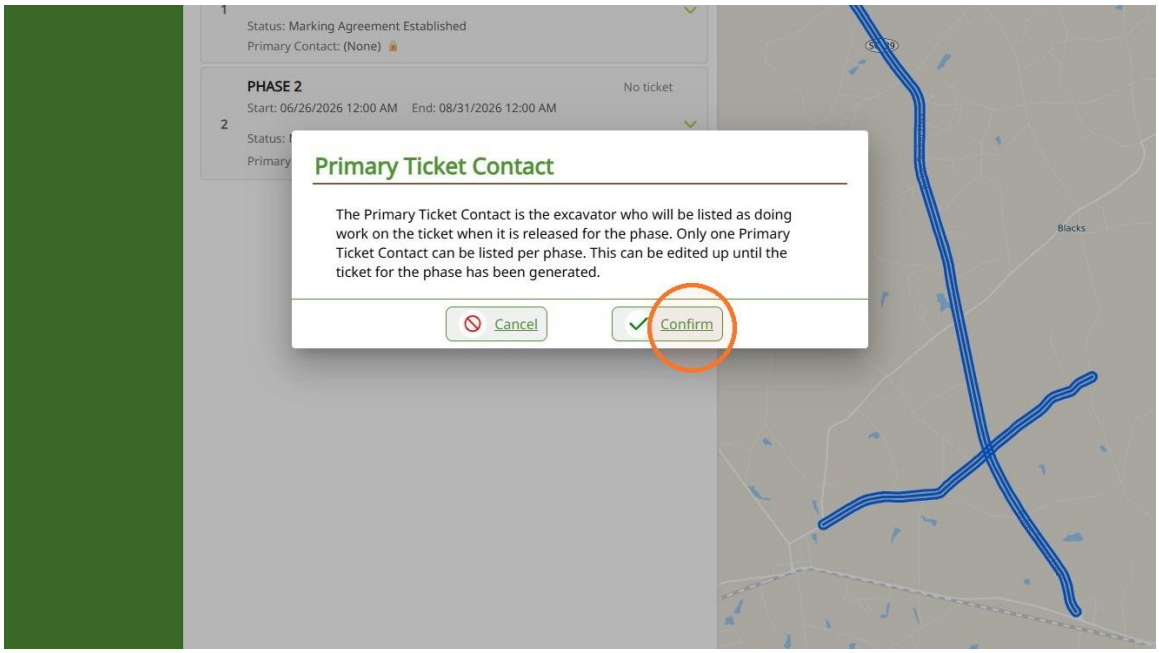
157. In some cases, you may wish to assign a **Primary Contact** for a phase. This designation identifies the contact as the main excavator and primary point of contact listed on the ticket associated with that phase.
Assigning a Primary Contact is optional. If no Primary Contact is selected, the project initiator will appear as the primary contact on the ticket, and any additional phase contacts will be listed as subcontractors.



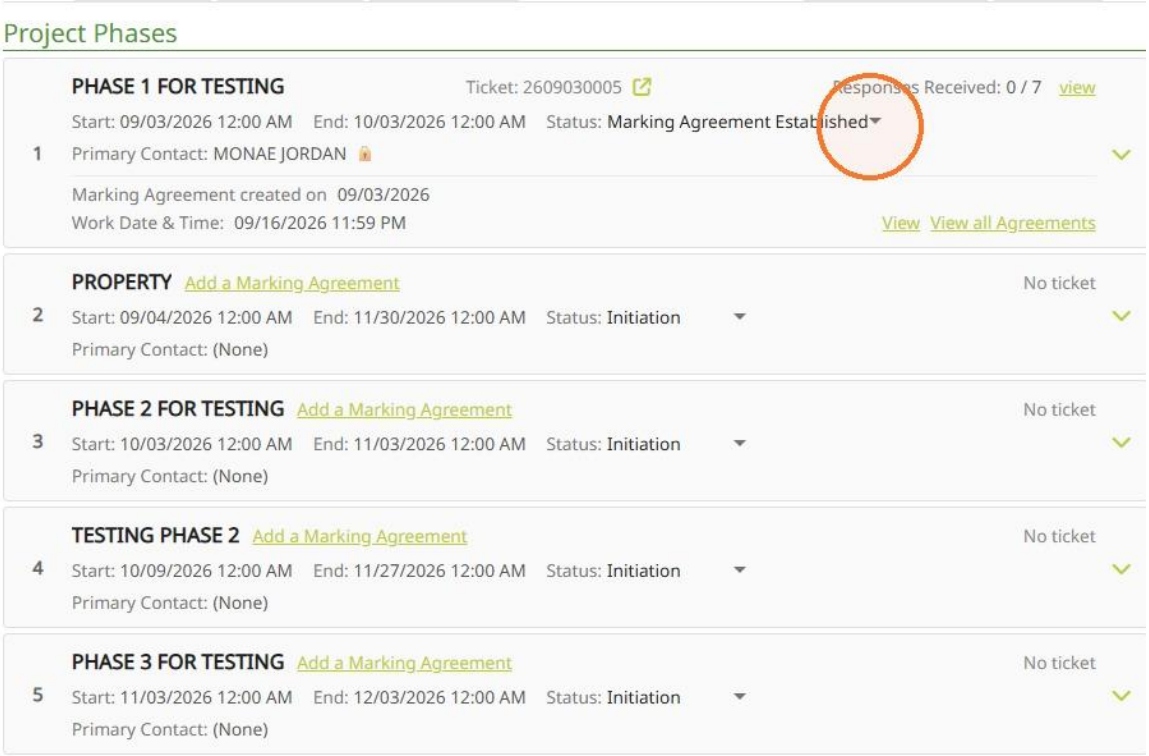
158. To assign a Primary Contact, click the dropdown arrow and select the appropriate contact. If the contact does not appear in the list, navigate to the **Contacts** tab to add them to the project and assign them to the applicable phase.



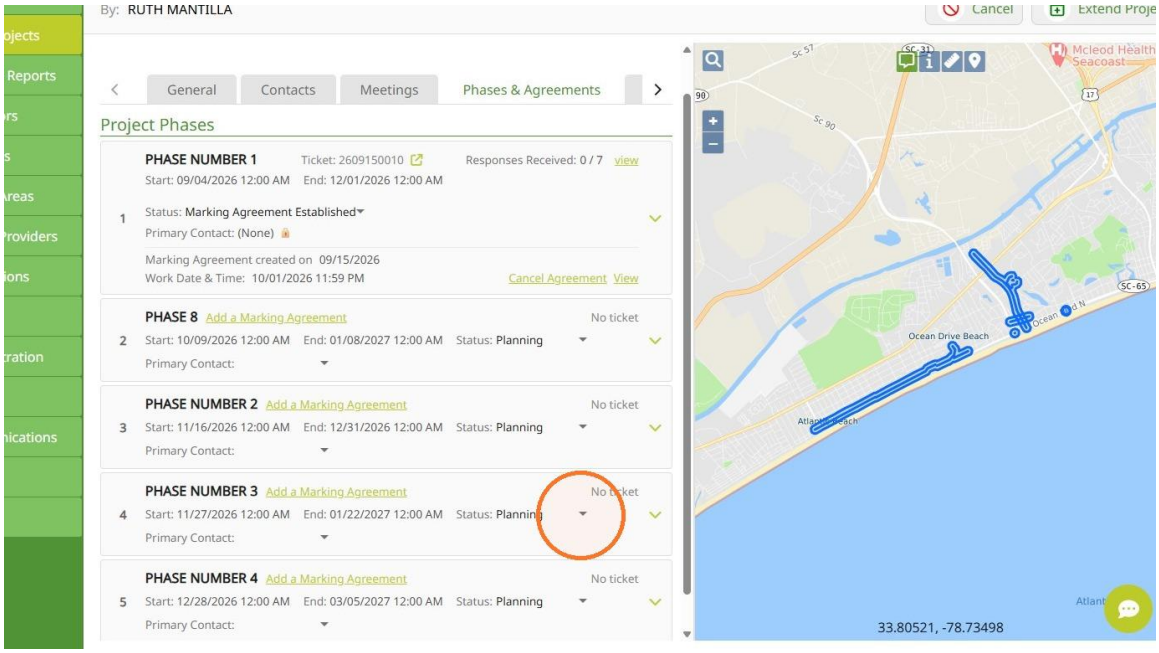
159. A confirmation message will appear for review. Verify the information, then click **Confirm** to assign the contact as the Primary Contact for the phase.



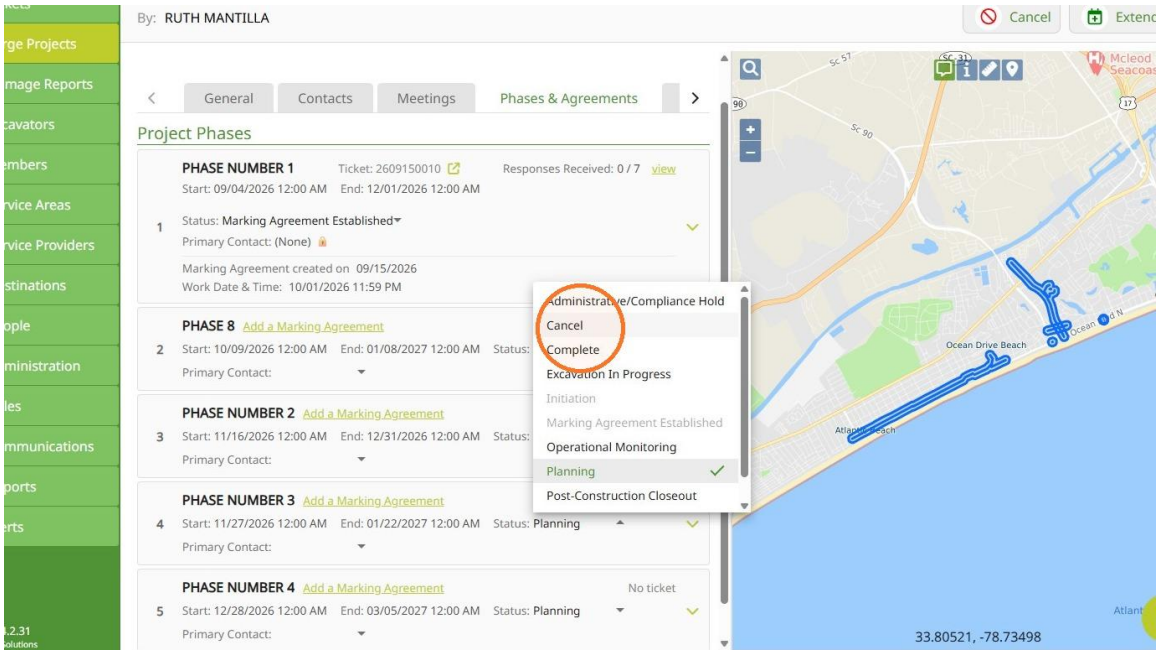
160. As work progresses, phase statuses can be updated to reflect the current stage of the project. Each phase begins with a status of **Initiation**. Once a marking agreement has been added for that phase, the status will automatically update to **Marking Agreement Established**. From there, statuses may be updated to reflect project activity, including statuses such as **Excavation In Progress**, **Administrative Hold**, and others as applicable.
To update a phase status, click the dropdown arrow next to the current phase status and select the appropriate option.



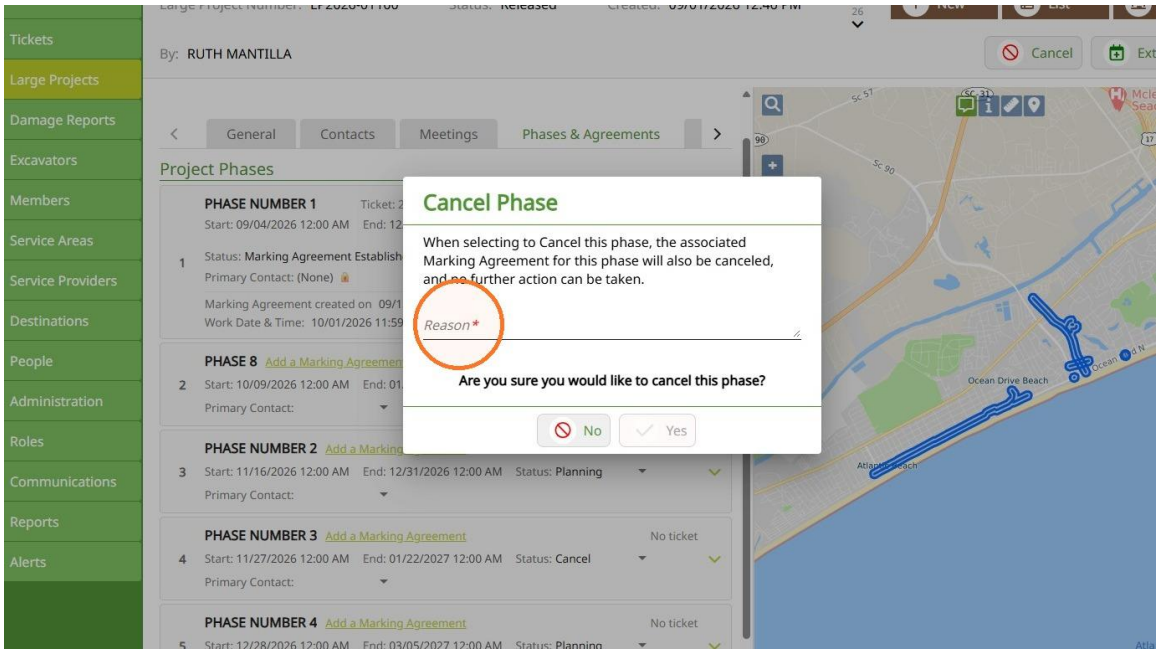
161. During the life of a Large Project, some phases may need to be canceled. To cancel a phase, go to the **Phases & Agreements** tab and locate the phase you need to cancel. In the **Status** section, click the drop-down menu.



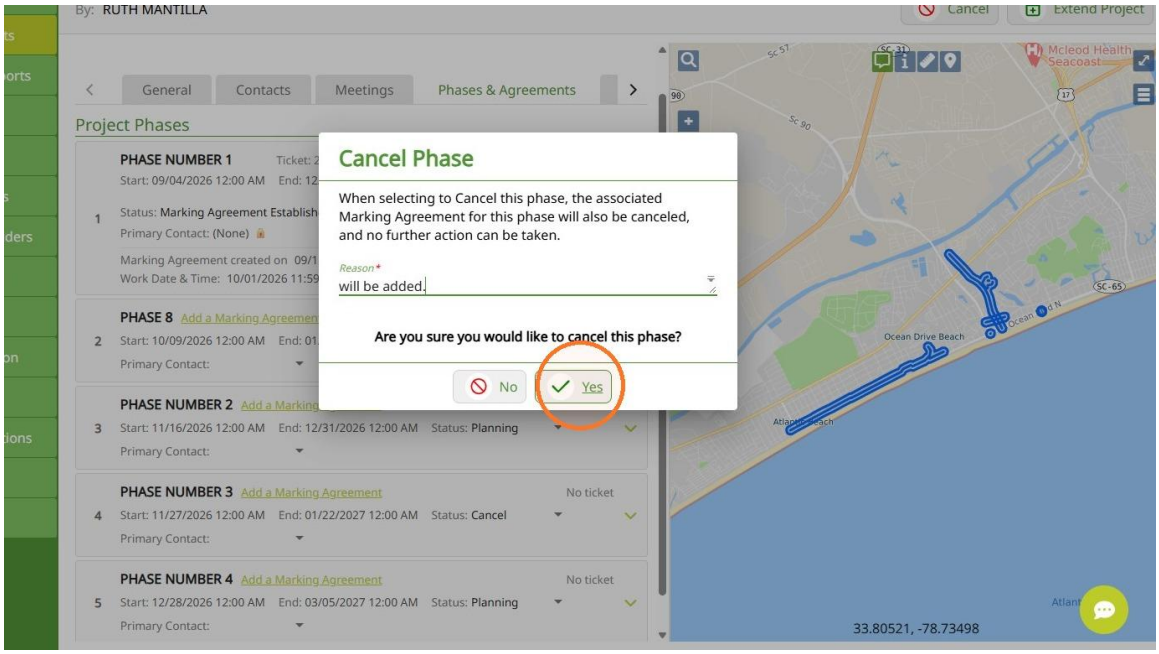
162. From the drop-down menu, select the **Cancel** option.



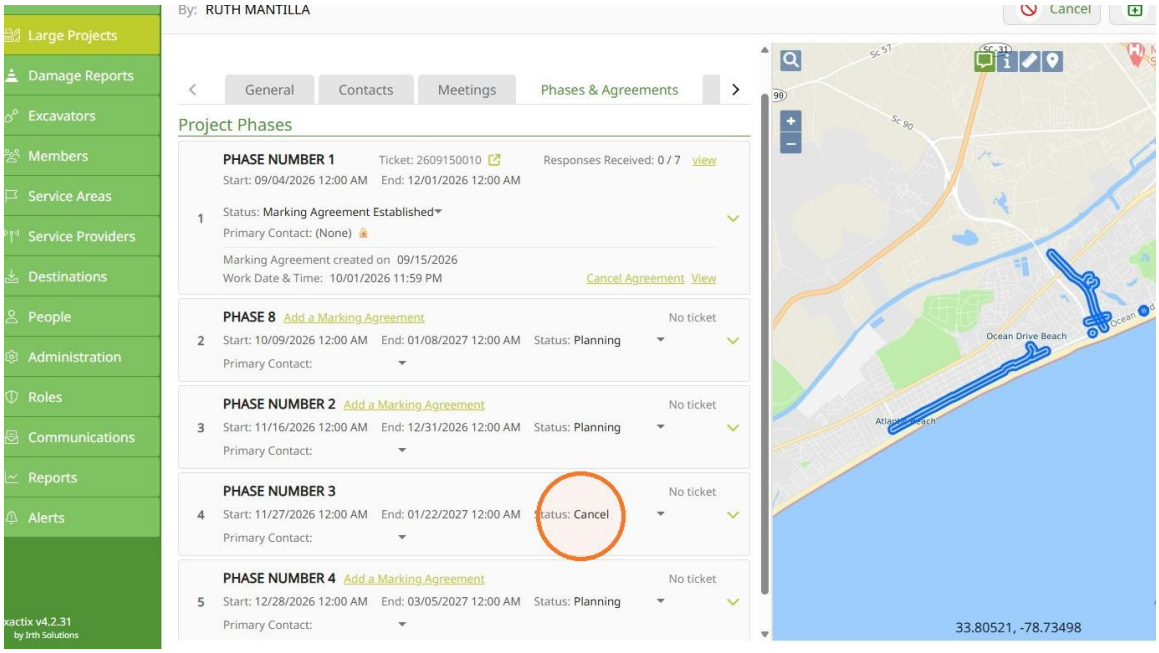
163. A pop-up window will appear, prompting you to enter the reason for canceling the selected phase.



164. After entering the reason for canceling the phase, select **Yes** in the pop-up window to continue.



165. The status will now display **Cancel**. Once a phase has been canceled, the action cannot be undone. If the phase is needed again, you will need to submit a new phase.



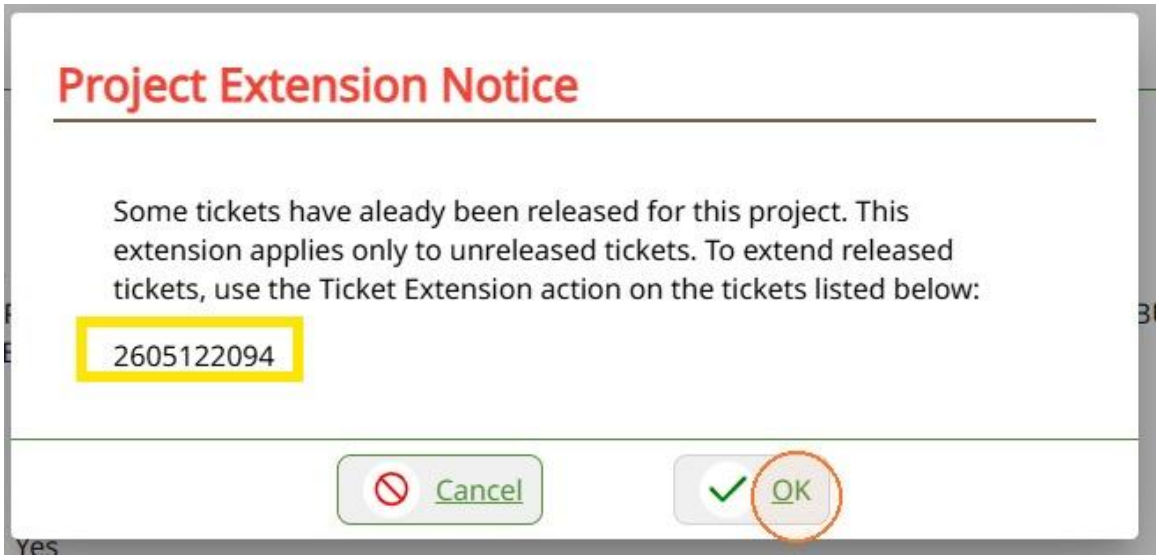
Important: Cancelling a phase is final and cannot be undone. If the phase is cancelled, a new phase may be created.

If the LP only has one phase, the entire project will be cancelled and a new project will need to be created.

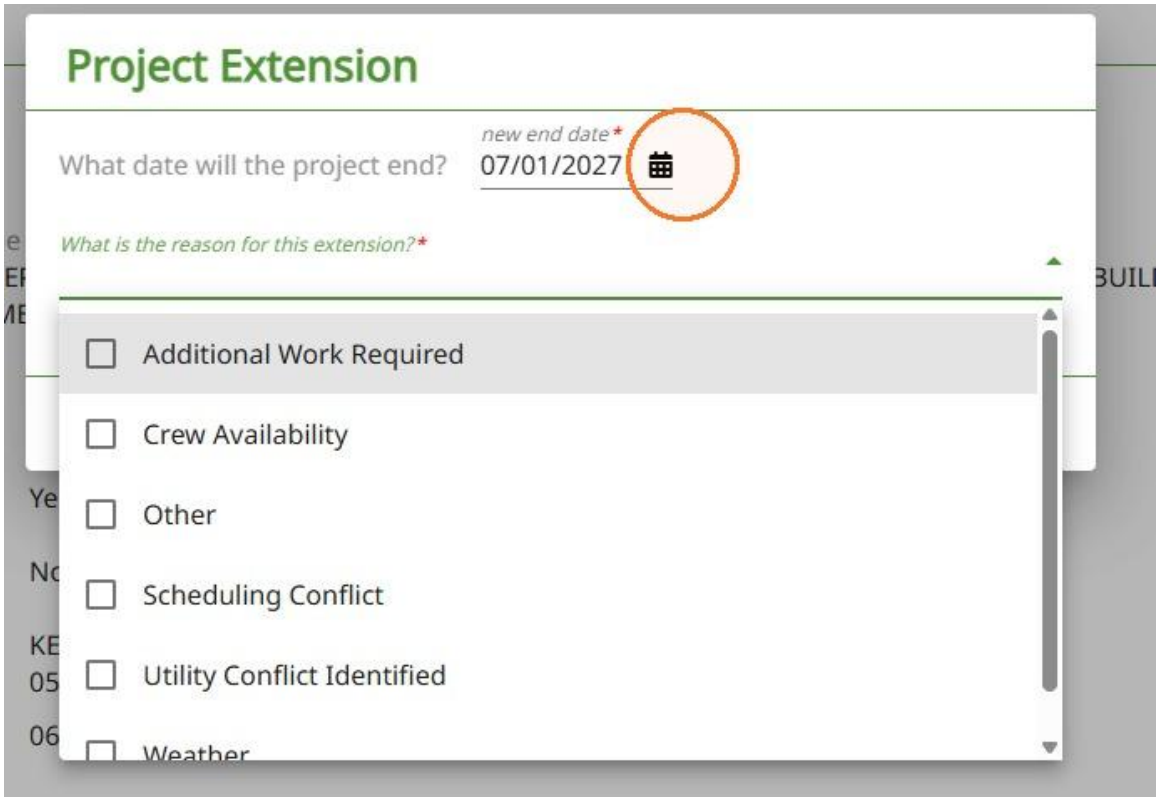
166. In some cases, projects may be delayed or continue beyond the originally anticipated completion date. To update the project end date, use the **Extend Project** button located in the upper-right corner of the project screen. Please note that extensions will not be allowed until the project is within 90 days of the original expiration date.
Select **Extend Project** to begin the extension process.



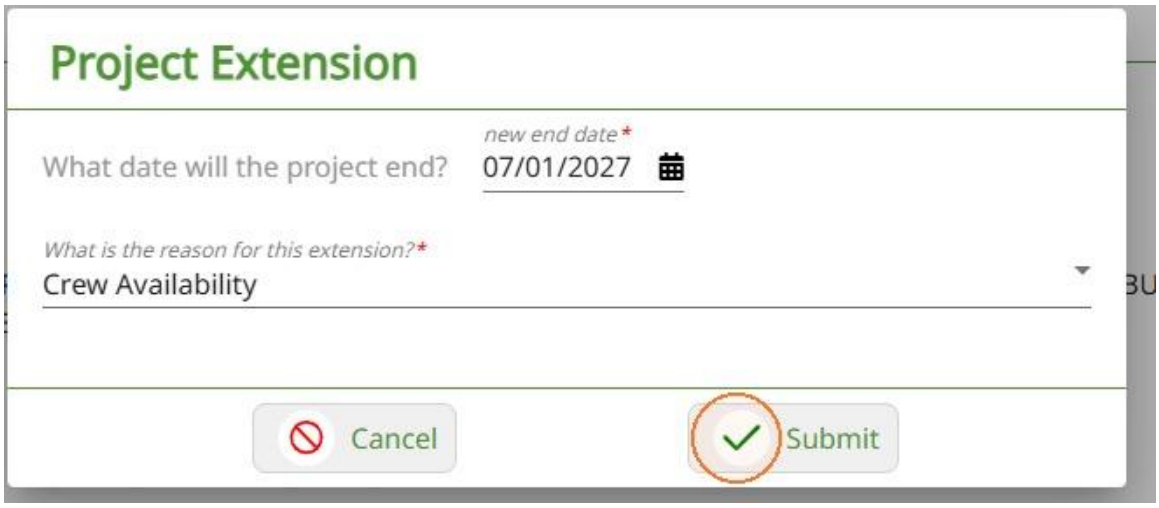
167. If tickets have already been released for any phase of the project, a message will appear explaining that the extension will apply only to the project itself and to any unreleased phase tickets. **This action will not update the expiration dates of tickets that have already been released.**
The message will also display the affected ticket numbers so you can process **Ticket Extensions** separately for those tickets as needed. Click **OK** to continue with the extension.



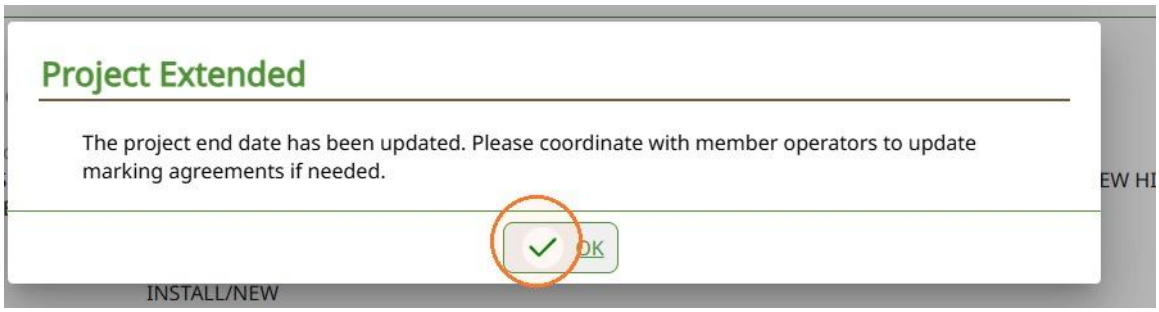
168. The **Project Extension** window will open. Enter the new project end date, then select the reason for the extension. Choose all applicable reasons from the dropdown menu provided.



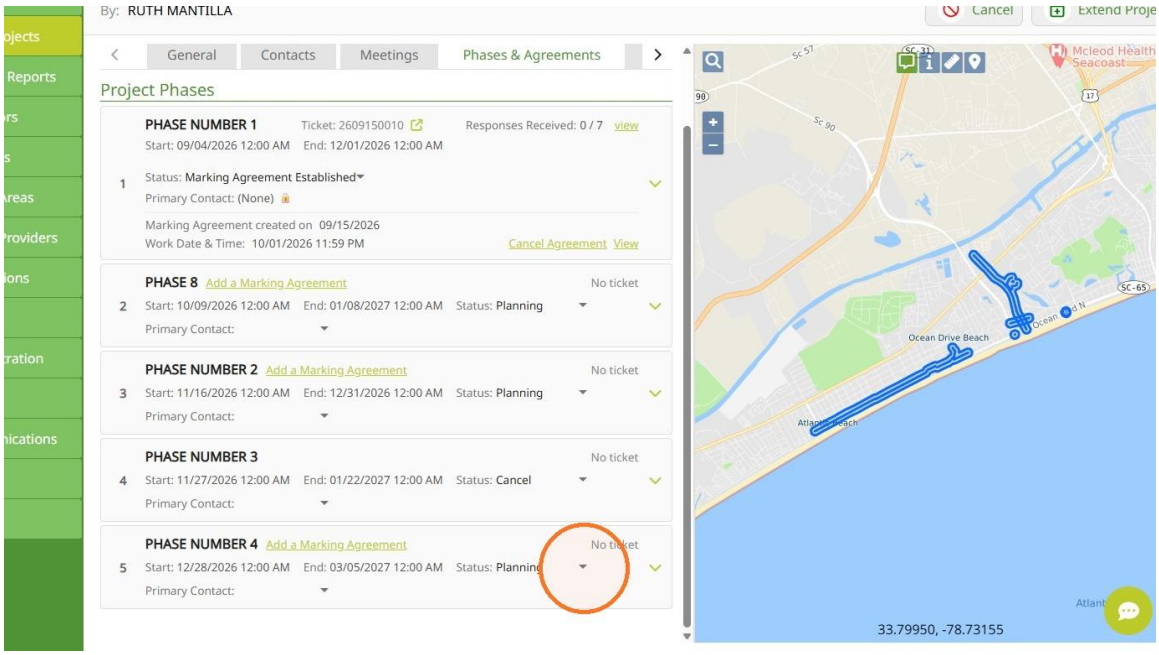
169. Click **Submit** to complete the project extension request.



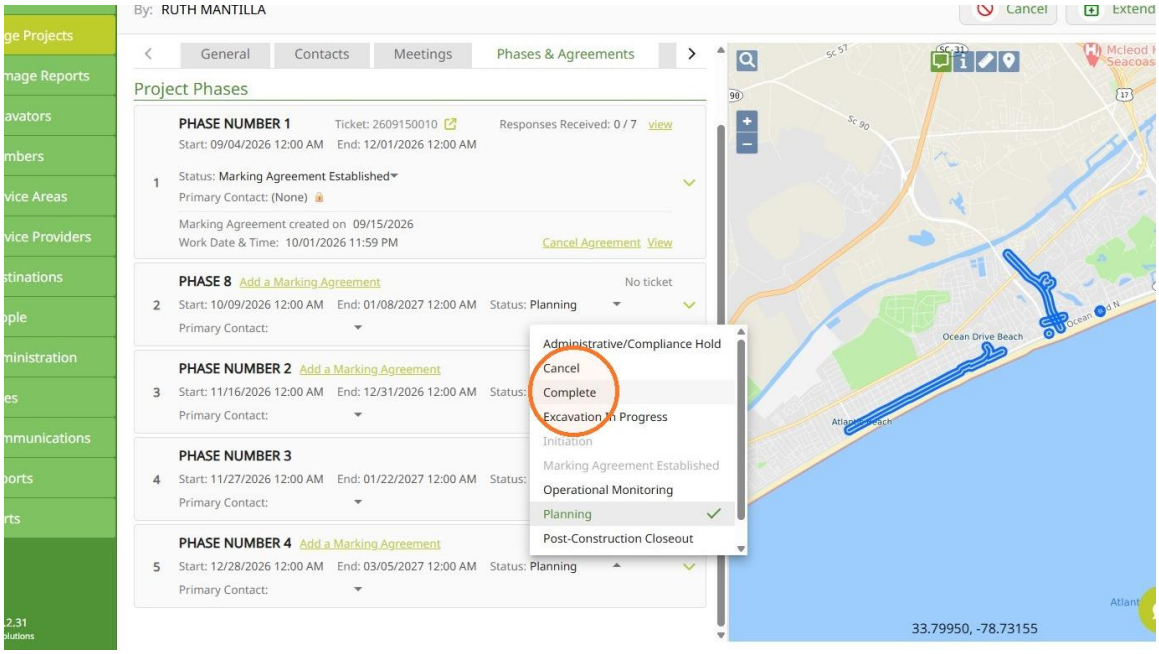
170. A confirmation box will appear. Click **OK** to close the message and complete the process.



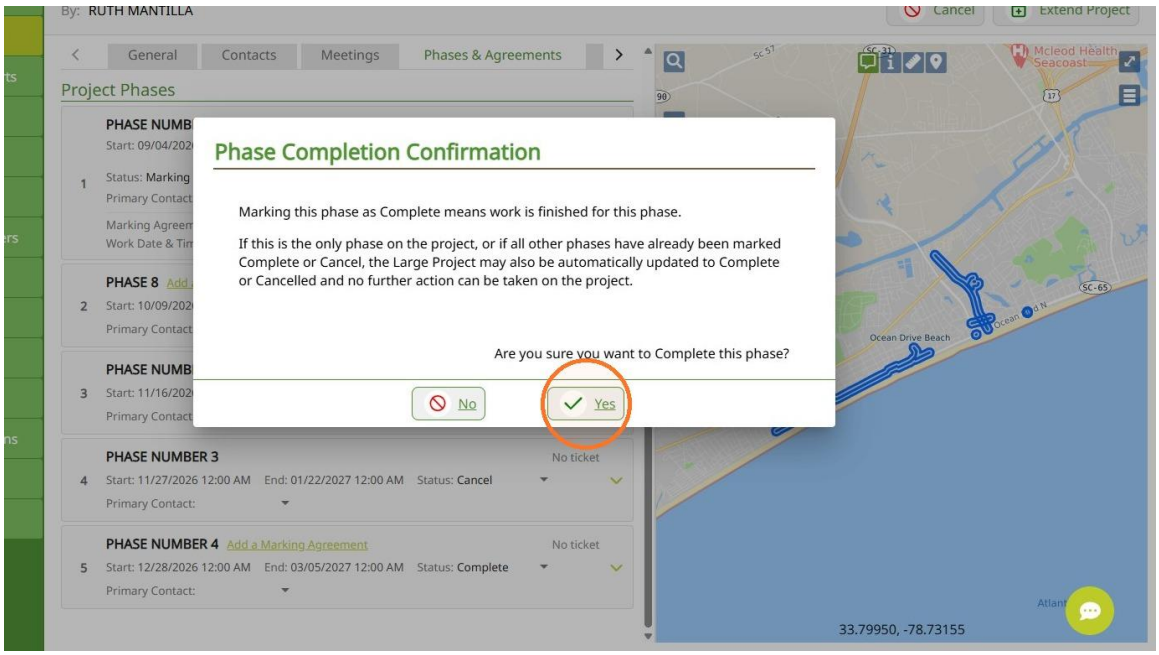
171. Once a phase within a Large Project has been completed, you can update its status using the drop-down menu.



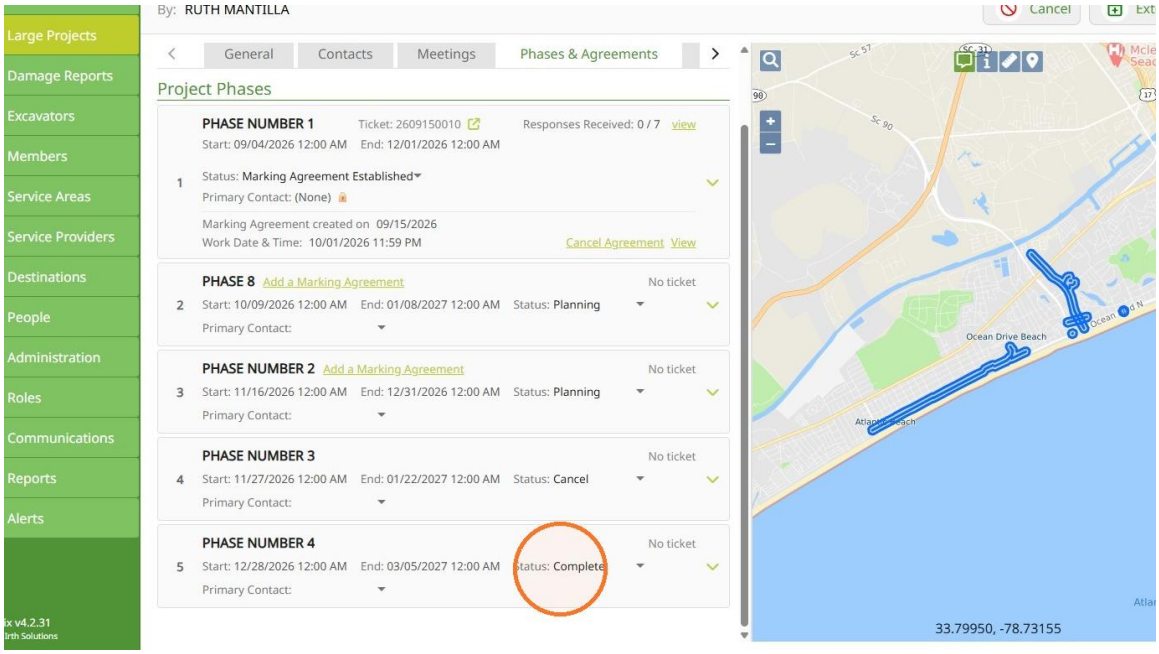
172. Select the '**Complete**' option from the drop-down menu.



173. Please review the information in the pop-up window carefully. If the correct phase is selected and the work has been completed, select the '**Yes**' button to continue.

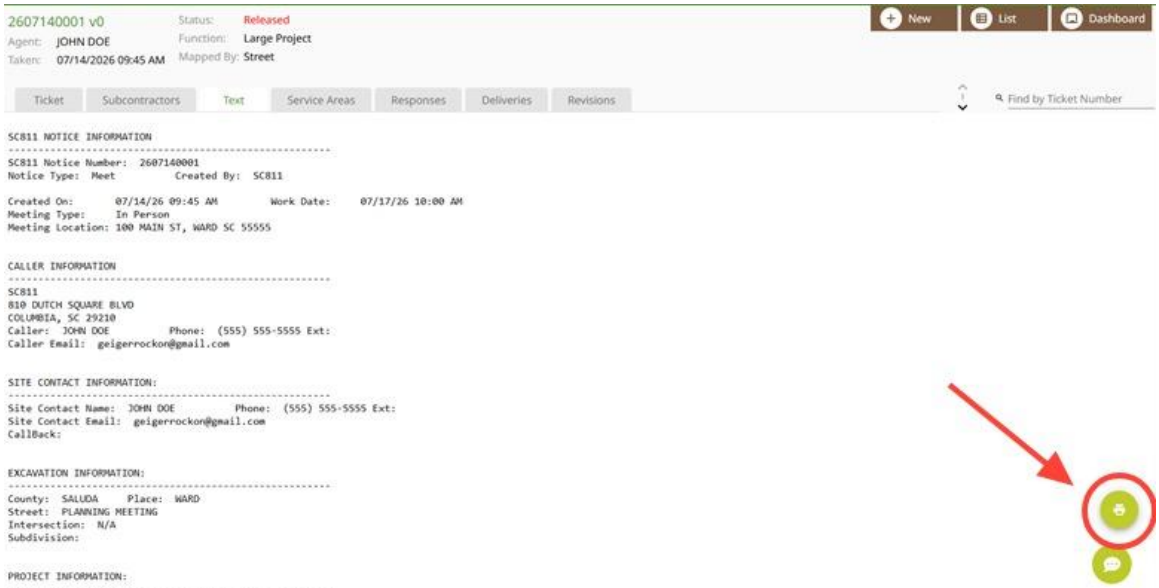


174. The phase status will now display **Complete** in the **Phases & Agreements** tab.



175. **Printing Ticket Information**

To print the ticket information, open the ticket you would like to print and click on the **Text** tab. The **Print** icon will be located at the bottom right of the page. This will print the ticket information, along with the Member Operators who were notified and their contact information.



Final Reminders

Final Reminders – Excavation Responsibilities

Before excavation begins, the excavator must confirm:

- The ticket has been successfully generated
- The ticket details are accurate for the phase of work
- A **100% positive response** has been received from all affected Member Operators
  No excavation may begin until all legal notification requirements are met, including proper notification and documented positive response.

Ticket Independence

Although Large Projects organize and generate excavation notices, each ticket operates independently once released. Every ticket must be managed like a standard locate request, including:

- Positive Response tracking
- Requests for Remarks
- No Show submissions when applicable
- Use of Add Info, Extensions, and other standard ticket functions

Project vs. Ticket Updates

Changes made in a Large Project do not automatically update associated tickets, and ticket actions do not update the project.
If project details, dates, or phase agreements change, both the Large Project and related tickets must be reviewed and updated separately. Managing one does not satisfy the other.

Expiration and Extensions

Newly released Large Project phases will have a ticket expiration period of 90 days. If work continues beyond the expiration date, an extension may be needed to keep the ticket active.
It is the excavator's responsibility to:

- Monitor ticket expiration dates.
- Request extensions when work will continue beyond the expiration date.
- Maintain active, valid tickets.
- Ensure no work takes place under an expired ticket.

Service Area Permissions Update
Service Area permissions are being merged for users who previously needed two separate logins to access Large Projects. This will simplify access and eliminate the need for multiple accounts.
Reminder: Local Users Cannot Resume Large Projects
Local users are still unable to resume a Large Project. Attempting to do so will result in an error and may impact the ticket.

176. If you have questions, please reach out to our support team via chat on the SC811 website. You can also email us at support@sc811.com , or call **1-800-290-2783, Option 1**.