lucity™

TRAINING GUIDE

Utility Locates

Utility Locates

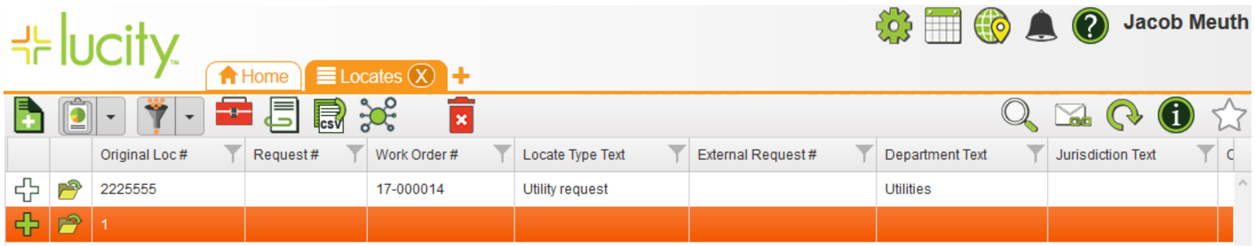
The Utility Locates modules allow agencies to keep track of all the location services they perform, as well as the utilities that are affected.

Contents

Utility Locates

The Utility Locates modules allow agencies to keep track of all the location services they perform, as well as the utilities that are affected. It also can track information about damage done to utilities.

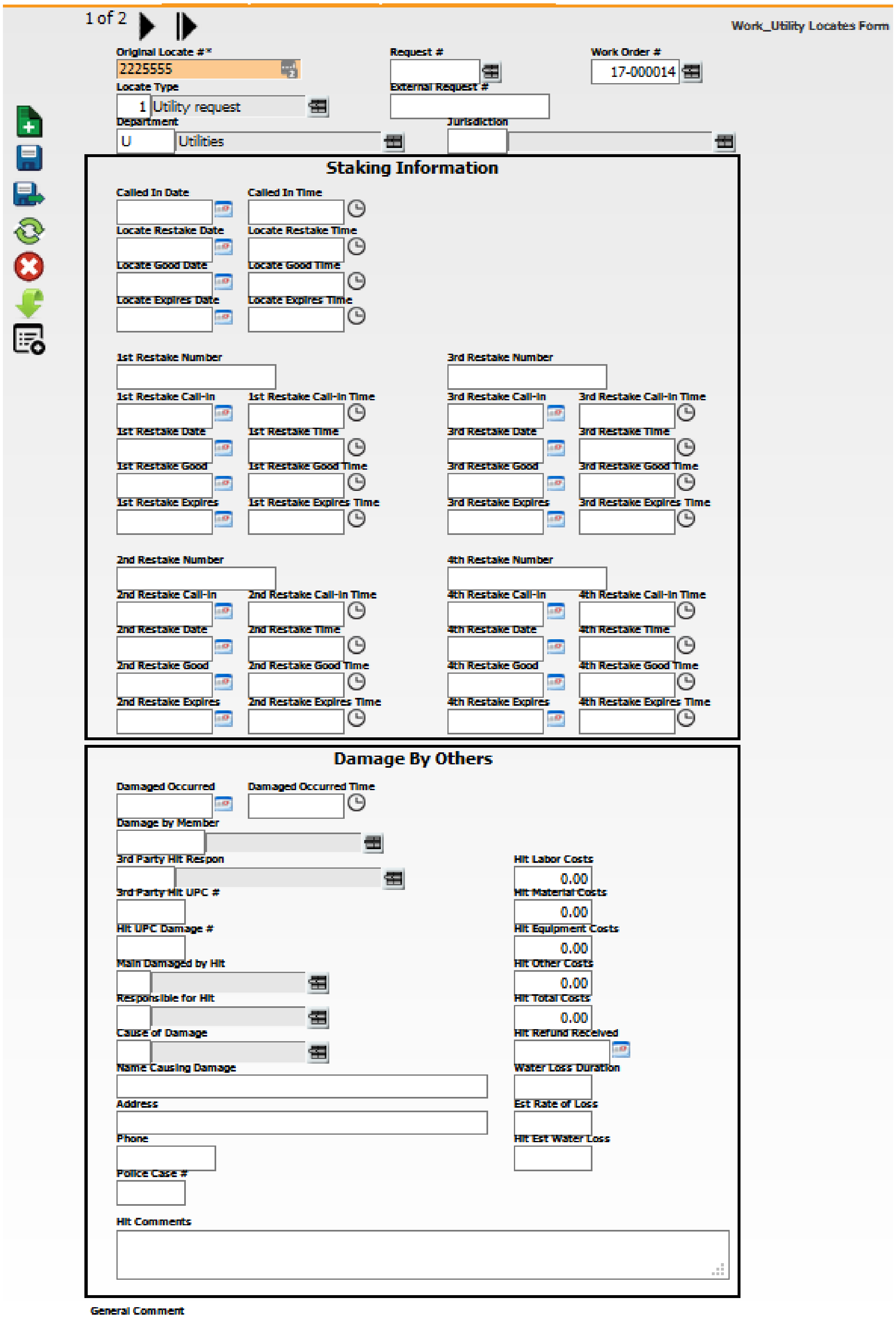
Utility locates is located in the Work > Utility Locates Menu



The Utility Locates view displays information for various Utility Locate records. The fields displayed in this view are totally customizable for your organization (or department, or user, etc), so may vary. The fields displayed in the view are immediately filterable sortable and searchable.

Notes:

You can click the form button beside any record to see the detailed information for the record. Once again, this form is completely customizable, but will generally display the following information.



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Work_Utility Locates Form

Original Locate #* 2225555

Request #

Work Order # 17-000014

Locate Type 1 Utility request

External Request #

Department U Utilities

Jurisdiction

Staking Information

Called In Date

Called In Time

Locate Restake Date

Locate Restake Time

Locate Good Date

Locate Good Time

Locate Expires Date

Locate Expires Time

1st Restake Number

1st Restake Call-In

1st Restake Call-In Time

1st Restake Date

1st Restake Time

1st Restake Good

1st Restake Good Time

1st Restake Expires

1st Restake Expires Time

3rd Restake Number

3rd Restake Call-In

3rd Restake Call-In Time

3rd Restake Date

3rd Restake Time

3rd Restake Good

3rd Restake Good Time

3rd Restake Expires

3rd Restake Expires Time

2nd Restake Number

2nd Restake Call-In

2nd Restake Call-In Time

2nd Restake Date

2nd Restake Time

2nd Restake Good

2nd Restake Good Time

2nd Restake Expires

2nd Restake Expires Time

4th Restake Number

4th Restake Call-In

4th Restake Call-In Time

4th Restake Date

4th Restake Time

4th Restake Good

4th Restake Good Time

4th Restake Expires

4th Restake Expires Time

Damage By Others

Damaged Occurred

Damaged Occurred Time

Damage by Member

3rd Party Hit Respon

3rd Party Hit UPC #

Hit UPC Damage #

Main Damaged by Hit

Responsible for Hit

Cause of Damage

Name Causing Damage

Address

Phone

Police Case #

Hit Labor Costs 0.00

Hit Material Costs 0.00

Hit Equipment Costs 0.00

Hit Other Costs 0.00

Hit Total Costs 0.00

Hit Refund Received

Water Loss Duration

Est Rate of Loss

Hit Est Water Loss

Hit Comments

General Comment

Header Data Fields

The **Original Loc #** indicates the user-defined, unique identifier for the utility locate.

The **Request #** links the *Utility Locate* to a *Request*. Click the caption button or click in the field and hit **F9** for a list of requests.

The **Work order #** links the *Utility Locate* to a *Work Order*. Click the caption button, or click in the field and hit **F9** for a list of work orders.

The **Location Type** identifies the type of locate that was performed.

Department identifies the department that will locate the utilities.

Jurisdiction indicates the agency in charge of the area in which the locate is performed.

Staking Fields

The **Called in Date** is the date the call was received. The system automatically completes this field when the *Utility Locate* is created from a request.

Checklist

Provides the ability to have a checklist item on the Utility locate. The ***Checklist Setup*** module allows users to create checklist templates for the ***Utility Locates*** module. The module consists of a ***Checklist Name*** field to identify the checklist, and a grid to contain the checklist items.

To access the *Utility Checklist setup* module, go to **Work > Utility Locates > Checklist Setup**.

Custom Fields

Provides a variety of field types for any additional information you wish to track, as well as a short general. Last Modified By fields will track when and who last updated this record.

Utility Members

The ***Utility Members*** module allows agencies to set up different utility companies or agencies with whom they work regularly.

To access the *Utility Members* module, go to **Work > Utility Locates > Utility Members**.

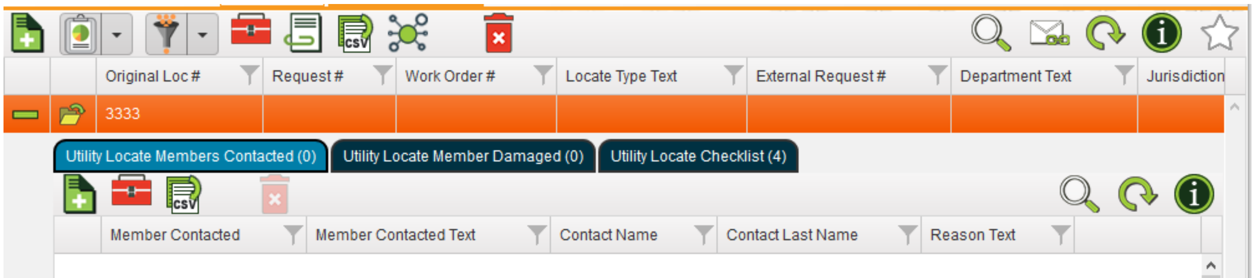
Violations

The *Violations* module allows users to setup violation records that can be used on *Utility Locates* when filling out *Damage to Others* records.

To access the *Violations* module, go to **Work > Utility Locates > Violations**.

Utility Locate Child Records

When hitting the + button, you display related child records for each Water Flushing Route record. The child records displayed vary, but could include: Utility Locate Members Contacted, Utility Locate Member Damaged, and Utility Locate Checklist.



Utility Locate Members Contacted:

This view shows who has been contacted from other Utilities and the reason.

Utility Locate Member Damaged:

This view shows some basic information about a damage ticket that has been completed for a time when the Utility associated to this ticket was damaged. COD is Cause Of Damage.

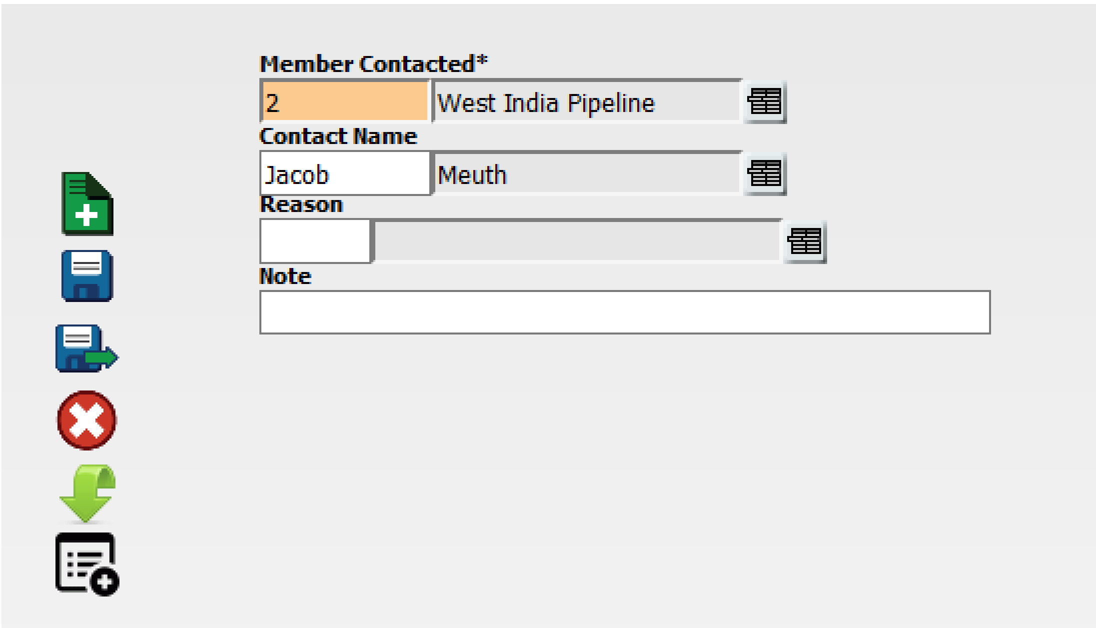
Utility Locate Checklist:

This view is the checklist items that the operator should have gone through to perform the locate. This checklist is user defined.

Notes:____

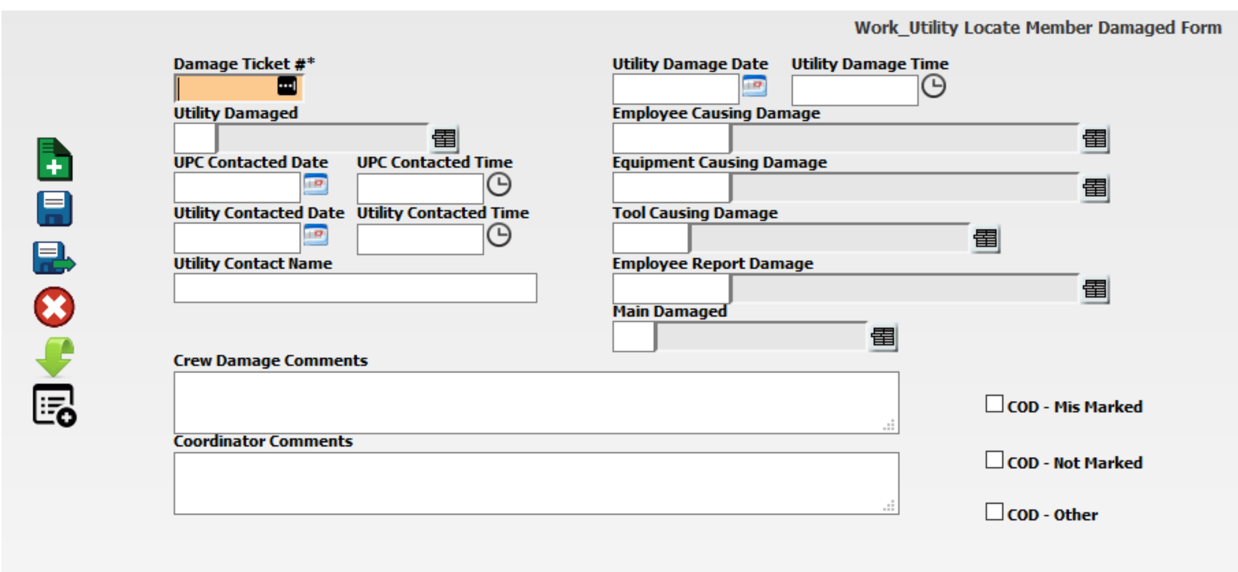
Utility Locate Members Contacted:

This is the standard form for the Utility Members located. The members contacted must be created in the **Utility Members module.**



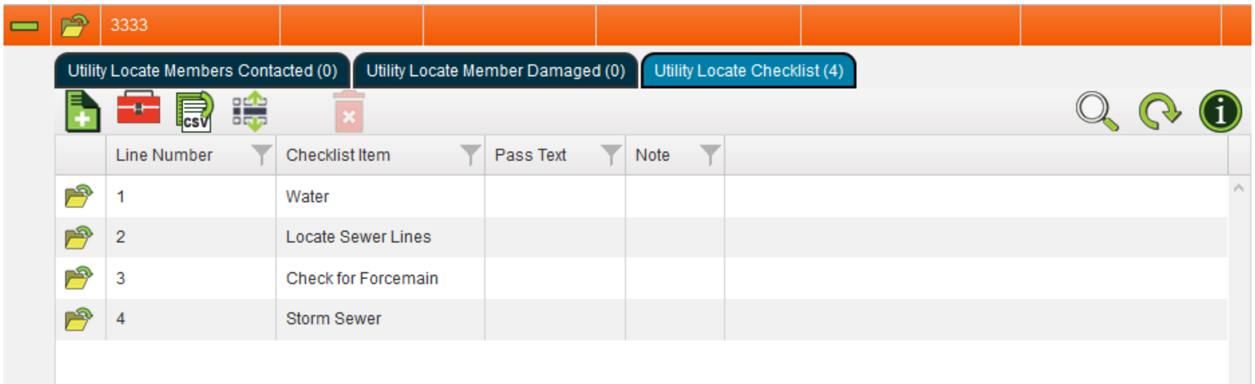
Utility Locate Member Damaged:

This is the standard form for the Utility locate member Damaged. It requires a “Damage Ticket #” that is user define.

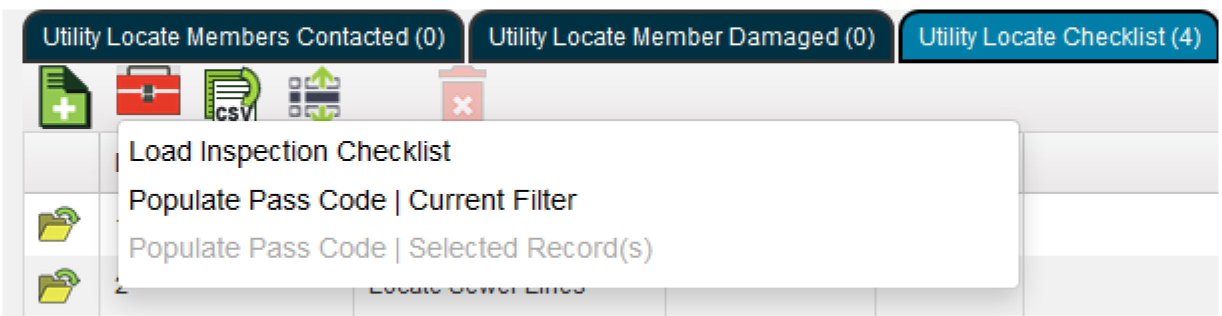


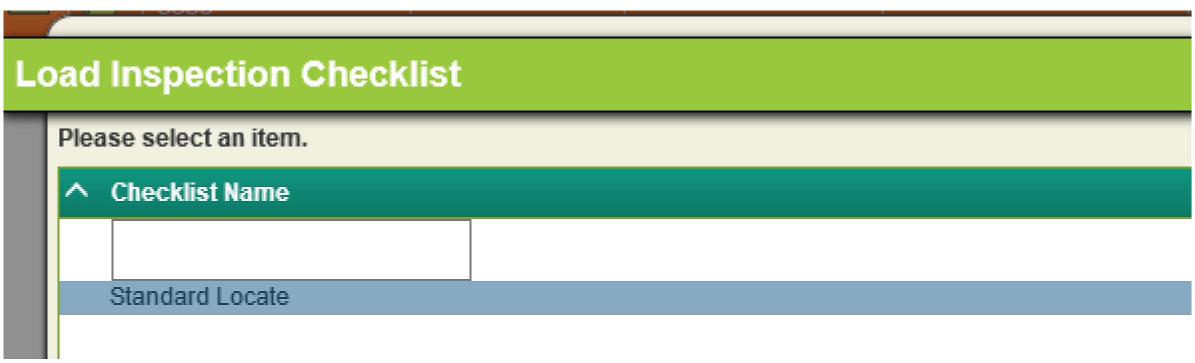
Utility Locate Checklist:

The utility locate checklist is a way to make sure that all the standard or nonstandard items were fulfilled for the locate.



Checklists can be loaded from the toolkit

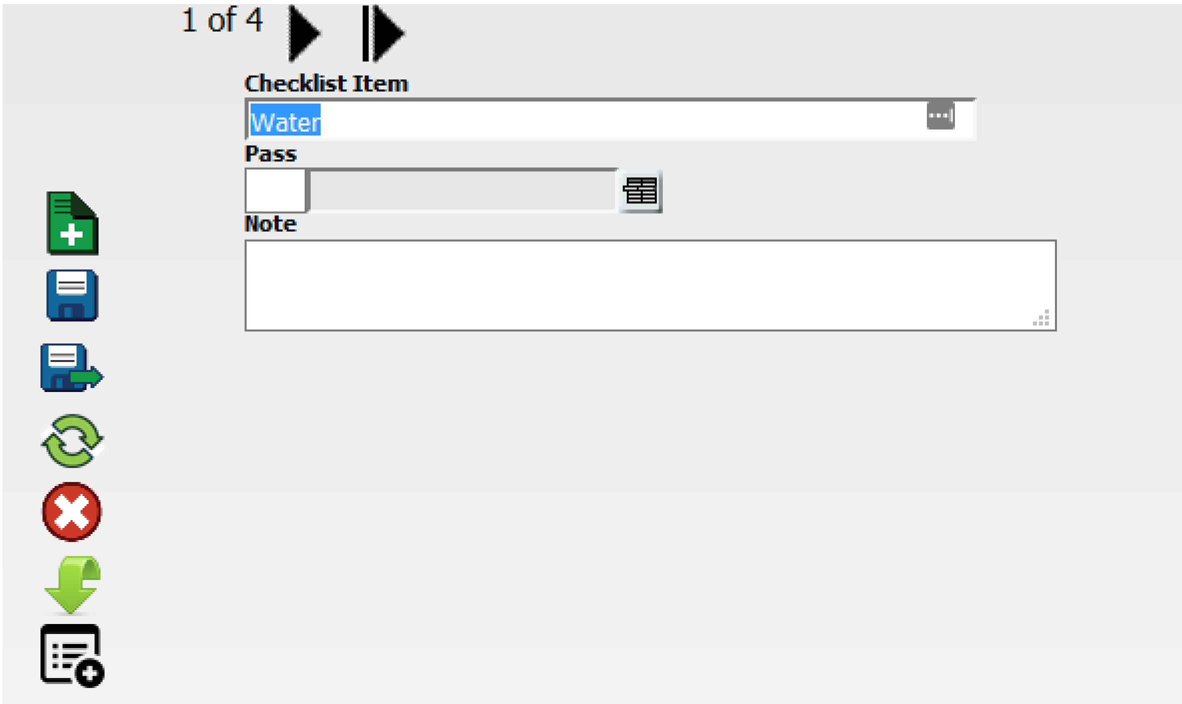




The checklist is created in the Utility Checklist Setup module.

Notes:

The form used to edit the checklist is below. It can be modified but this is the standard form.



Child Grids Utility Locate Member Damaged

There are three Child grids to the Utility member Locate Damaged Grid: Utility Locate Witness to Damage, Utility Locate Member Damage Violations, and Utility Locate Member Owed Amounts.

Utility Locate Witness to Damage

This record is the person who witnessed the damage and how it occurred.

Utility Locate Member Damage Violations

This records the violations that occurred leading to damage. The violations must be set up in the violations module.

The ***Violations*** module allows users to setup violation records that can be used on *Utility Locates* when filling out *Damage to Others* records. **Work > Utility Locates > Violations**

Utility Locate Member Owed Amounts

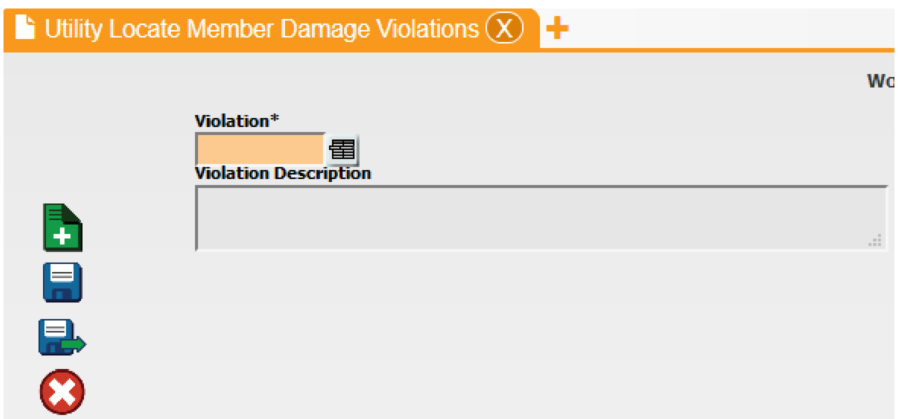
This records the entity and amount owed to them for Incurred Damage. Members are set up in the Utility Members Module.

Utility Locate Witness to Damage:

Standard Form Employees will come from the Employees list in Work Flow Setup "Employees".

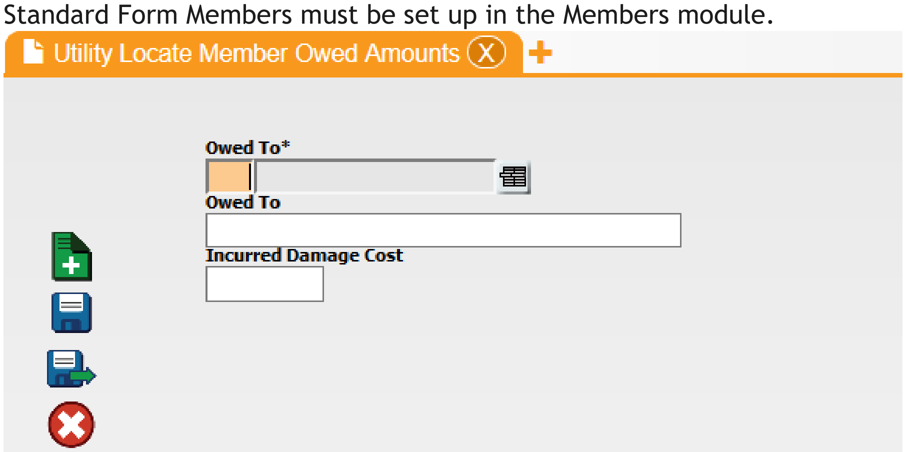
Utility Locate Member Damage Violations

Standard Form Violations must be set up in the Violations Module.



Utility Locate Member Owed Amounts

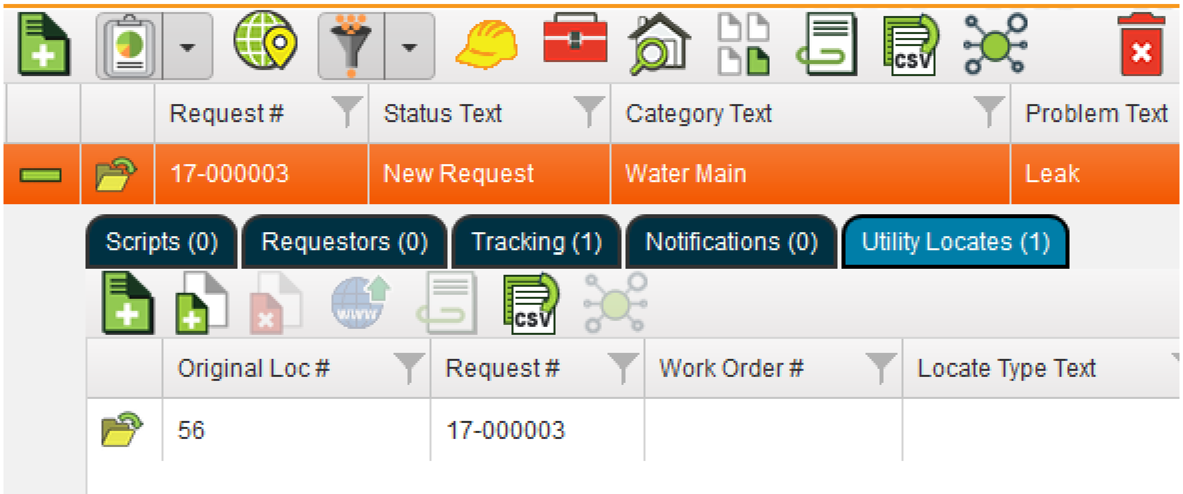
Standard Form Members must be set up in the Members module.



Adding New Utility Locate from a Request or Work Order

Adding a new Utility Locate from a request or work order will cause the request or work order number to be carried to the Utility Locate. In the case of a request it will also carry the "Call in Date" and "Call in Time". This will be the time and date the request was created.

To create a new Utility Locate from a request or work order the child grid "Utility Locate" must be enabled on the view. This is done through forms and view manager in the Admin tools.



Once you have "Utility Locates" as a view you can add a new Locate by click the green "+ add"

Keep in mind this only creates a new locate and can edit the Utility Locate form. The child records for that Utility Locate are only available in the Utility Locates View.

Notes:____