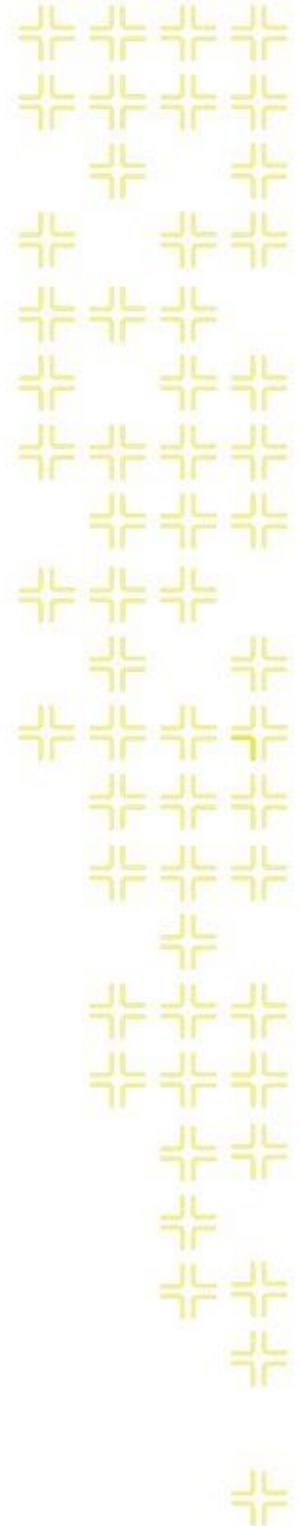




TRAINING GUIDE

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.

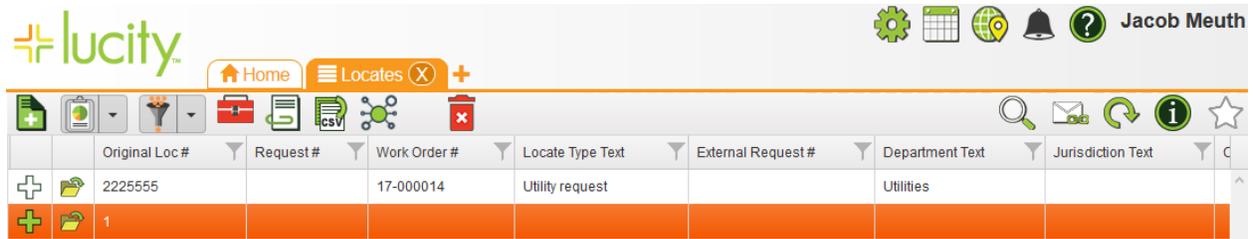
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Utility Locates

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 screenshot shows the Lucity web application interface. At the top left is the Lucity logo. To the right of the logo are navigation tabs for 'Home' and 'Locates'. The 'Locates' tab is active. Below the tabs is a toolbar with various icons for actions like adding, deleting, and refreshing. The main content area is a table with the following columns: Original Loc #, Request #, Work Order #, Locate Type Text, External Request #, Department Text, and Jurisdiction Text. The table contains one record with the following data: Original Loc # 2225555, Request # (empty), Work Order # 17-000014, Locate Type Text Utility request, External Request # (empty), Department Text Utilities, and Jurisdiction Text (empty).

	Original Loc #	Request #	Work Order #	Locate Type Text	External Request #	Department Text	Jurisdiction Text	C
	2225555		17-000014	Utility request		Utilities		

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.

1 of 2  Work_Utility Locates Form

Original Locate #* Request # Work Order #

Locate Type External Request #

Department Jurisdiction

Staking Information

Called In Date <input type="text"/>	Called In Time <input type="text"/>
Locate Restake Date <input type="text"/>	Locate Restake Time <input type="text"/>
Locate Good Date <input type="text"/>	Locate Good Time <input type="text"/>
Locate Expires Date <input type="text"/>	Locate Expires Time <input type="text"/>

1st Restake Number <input type="text"/>	3rd Restake Number <input type="text"/>
1st Restake Call-In <input type="text"/>	3rd Restake Call-In <input type="text"/>
1st Restake Date <input type="text"/>	3rd Restake Date <input type="text"/>
1st Restake Good <input type="text"/>	3rd Restake Good <input type="text"/>
1st Restake Expires <input type="text"/>	3rd Restake Expires <input type="text"/>

2nd Restake Number <input type="text"/>	4th Restake Number <input type="text"/>
2nd Restake Call-In <input type="text"/>	4th Restake Call-In <input type="text"/>
2nd Restake Date <input type="text"/>	4th Restake Date <input type="text"/>
2nd Restake Good <input type="text"/>	4th Restake Good <input type="text"/>
2nd Restake Expires <input type="text"/>	4th Restake Expires <input type="text"/>

Damage By Others

Damaged Occurred <input type="text"/>	Damaged Occurred Time <input type="text"/>
Damage by Member <input type="text"/>	
3rd Party Hit Respon <input type="text"/>	
3rd Party Hit UPC # <input type="text"/>	
HIT UPC Damage # <input type="text"/>	
Main Damaged by Hit <input type="text"/>	
Responsible for HIT <input type="text"/>	
CAUSE of Damage <input type="text"/>	
Name Causing Damage <input type="text"/>	
Address <input type="text"/>	
Phone <input type="text"/>	
Police Case # <input type="text"/>	
HIT Comments <input type="text"/>	

HIT Labor Costs	<input type="text" value="0.00"/>
HIT Material Costs	<input type="text" value="0.00"/>
HIT Equipment Costs	<input type="text" value="0.00"/>
HIT Other Costs	<input type="text" value="0.00"/>
HIT Total Costs	<input type="text" value="0.00"/>
HIT Refund Received	<input type="text"/>
Water Loss Duration	<input type="text"/>
Est Rate of Loss	<input type="text"/>
HIT Est Water Loss	<input type="text"/>

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**.

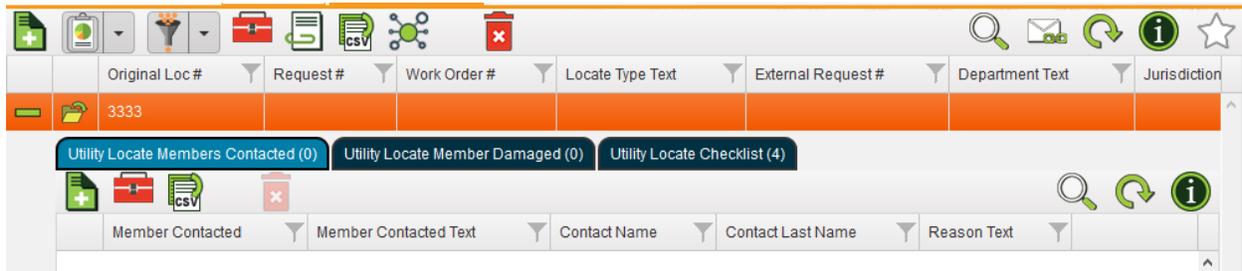
Violations

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.

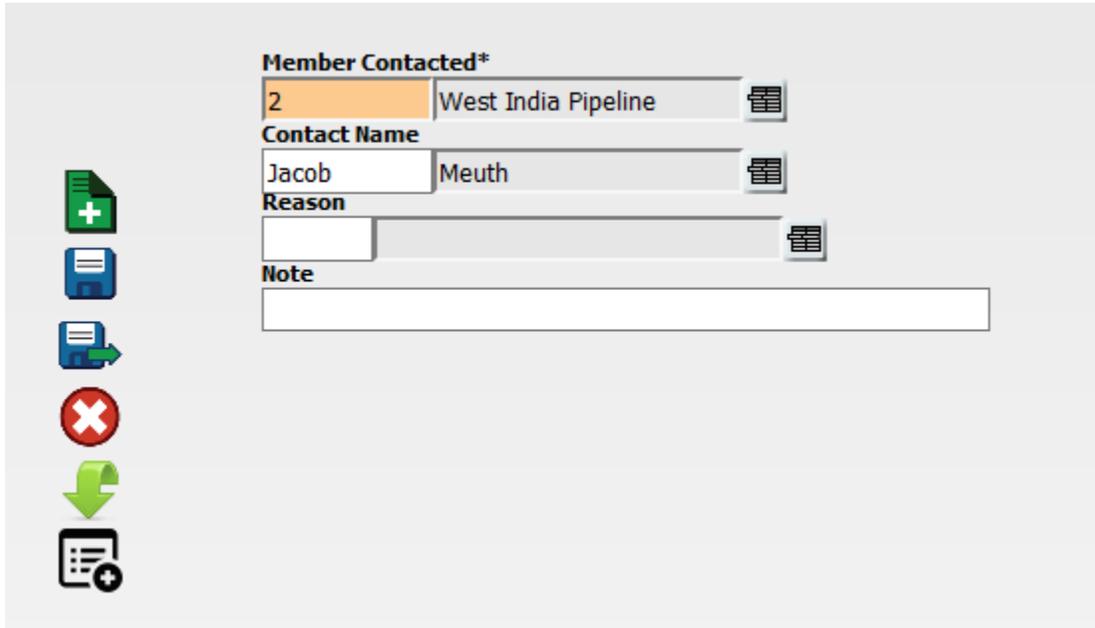
Utility Locate Checklist:

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.



Member Contacted*
2 West India Pipeline

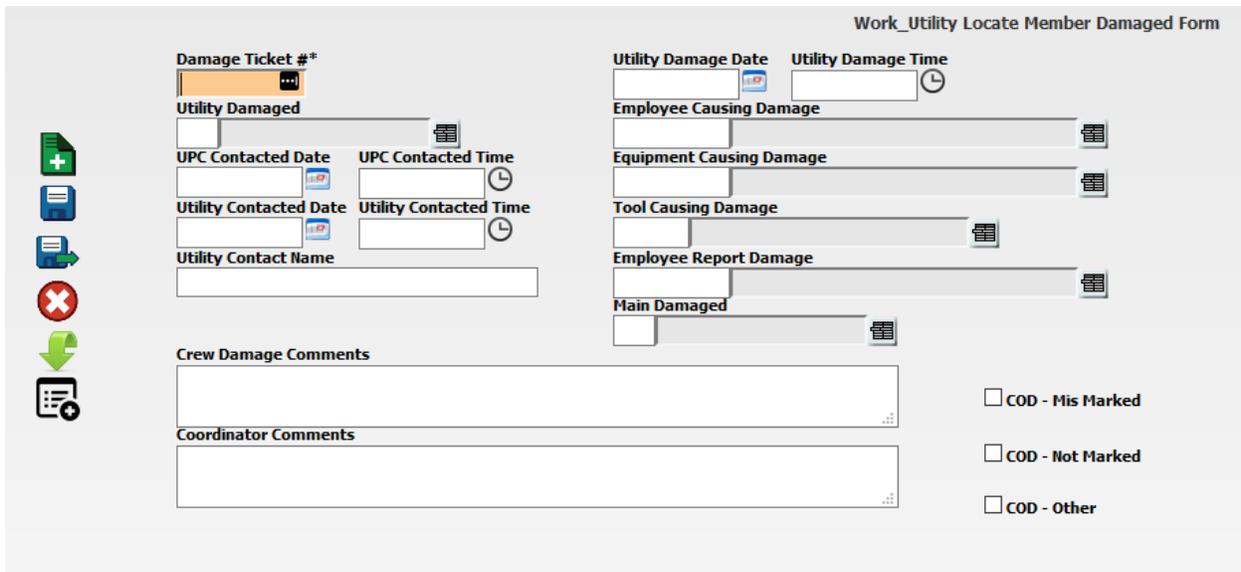
Contact Name
Jacob Meuth

Reason

Note

Utility Locate Member Damaged:

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



Work_Utility Locate Member Damaged Form

Damage Ticket #*

Utility Damaged

UPC Contacted Date **UPC Contacted Time**

Utility Contacted Date **Utility Contacted Time**

Utility Contact Name

Crew Damage Comments

Coordinator Comments

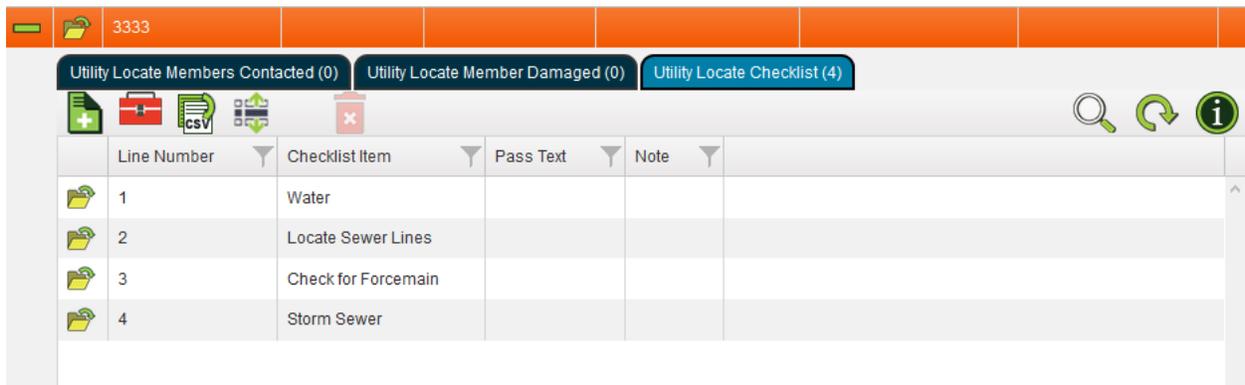
COD - Mis Marked

COD - Not Marked

COD - Other

Utility Locate Checklist:

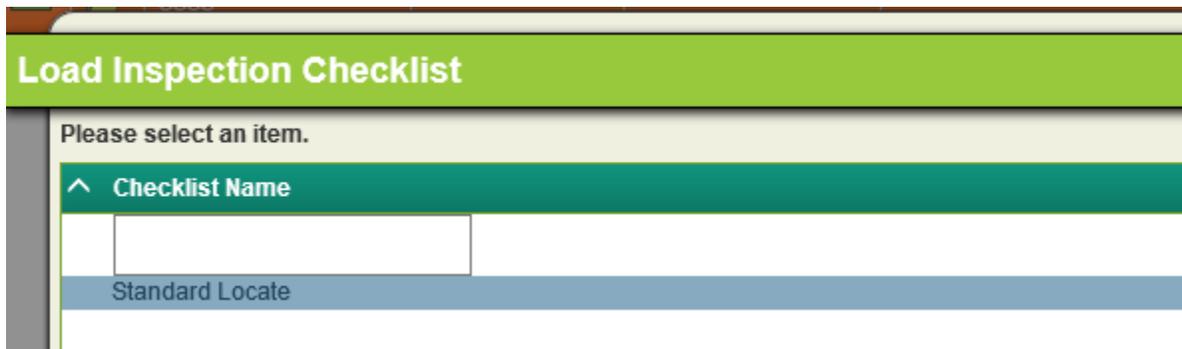
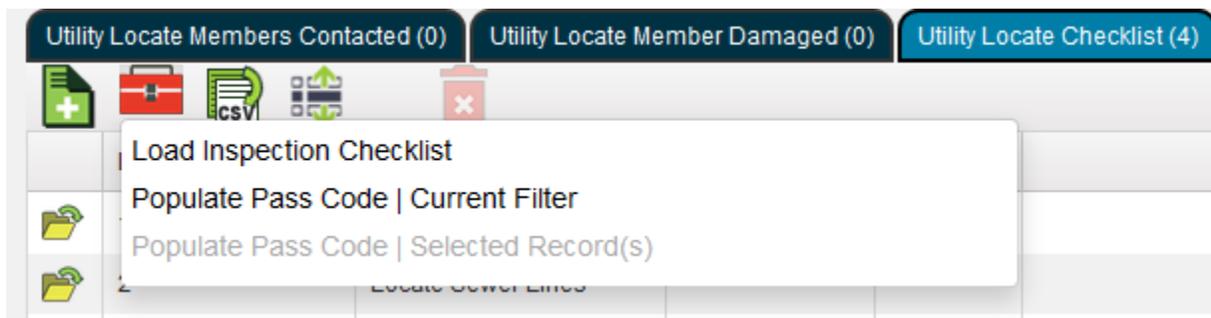
The utility locate checklist is a way to make sure that all the standard or nonstandard items were fulfilled for the locate.



The screenshot shows a software interface with a top navigation bar containing three tabs: "Utility Locate Members Contacted (0)", "Utility Locate Member Damaged (0)", and "Utility Locate Checklist (4)". Below the tabs is a toolbar with icons for adding, deleting, and refreshing. The main area is a table with the following data:

Line Number	Checklist Item	Pass Text	Note
1	Water		
2	Locate Sewer Lines		
3	Check for Forcemain		
4	Storm Sewer		

Checklists can be loaded from the toolkit



The screenshot shows a dialog box titled "Load Inspection Checklist". It contains the text "Please select an item." and a list of items. The first item is "Standard Locate", which is currently selected and highlighted in blue.

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.

1 of 4

Checklist Item

Water

Pass

Note

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”.

The screenshot shows a software interface for 'Utility Locate Witness of Damages'. At the top, there is a title bar with a document icon, the text 'Utility Locate Witness of Damages', a close button (X), and a plus sign (+). Below the title bar is a large text input field labeled 'Employee Witness*'. To the left of the input field is a vertical stack of four icons: a green document with a plus sign, a blue document, a blue document with a green arrow, and a red circle with a white X. The input field contains a small orange box and a list icon.

Utility Locate Member Damage Violations

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

The screenshot shows a software interface for 'Utility Locate Member Damage Violations'. At the top, there is a title bar with a document icon, the text 'Utility Locate Member Damage Violations', a close button (X), and a plus sign (+). Below the title bar is a large text input field labeled 'Violation*'. Below this is a text area labeled 'Violation Description'. To the left of the input field is a vertical stack of four icons: a green document with a plus sign, a blue document, a blue document with a green arrow, and a red circle with a white X. The input field contains a small orange box and a list icon.

Utility Locate Member Owed Amounts

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

The screenshot shows a software interface for 'Utility Locate Member Owed Amounts'. At the top, there is a title bar with a document icon, the text 'Utility Locate Member Owed Amounts', a close button (X), and a plus sign (+). Below the title bar are three text input fields: 'Owed To*', 'Owed To', and 'Incurred Damage Cost'. To the left of the input fields is a vertical stack of four icons: a green document with a plus sign, a blue document, a blue document with a green arrow, and a red circle with a white X. The 'Owed To*' field contains a small orange box and a list icon.

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.

The screenshot displays a software interface with two data grids. The top grid shows a request with the following details:

Request #	Status Text	Category Text	Problem Text
17-000003	New Request	Water Main	Leak

Below this grid are several tabs: Scripts (0), Requestors (0), Tracking (1), Notifications (0), and Utility Locates (1). The 'Utility Locates (1)' tab is selected. Below the tabs is another grid with the following details:

Original Loc #	Request #	Work Order #	Locate Type Text
56	17-000003		

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: _____
