



DIGGING IN TO BEST PRACTICES

Managing Locates

What you need to know...

The web portal has search and export functions available to help you organize and track your locate requests.

The “Search engine” can show a list of your locate requests, up to a maximum of 31 days at a time. You may customize the list by adding or removing search parameters; Type of work, Mun./Twsp, street, Caller name, etc.

The “Export” option creates an Excel spreadsheet with a column for each search parameter found in the search engine. You can sort, add, or remove columns in the Excel spreadsheet for your internal office purposes. This can help track long term projects, validity dates, relocates, etc.

Why you want to do this...

Managing locates as a Team can help to organize locates and relocates during vacations and prevent duplicate work.

Where can you find assistance?

Contact Ontario One Call Client Services for web portal support by email: Solutions@OntarioOneCall.ca

	A	B	C	D	E	F	G
1	Ticket #	Received date	Work to begin	Company name	Mun./Twsp	Address	Street
2	2018298207	7/17/2018 11:15:29 AM	7/17/2018	ONTARIO ONE CALL	W	Sort A to Z	

Search engine

Ticket #	Received date	Work to begin	Company name	Mun./Twsp
2018298207	7/17/2018 11:15:29 AM	7/17/2018	ONTARIO ONE CALL	WHITBY
1018250111	7/9/2018 9:31:20 AM	8/31/2018	ONTARIO ONE CALL	TORONTO
2018250115	7/8/2018 8:10:04 AM	7/17/2018	ONTARIO ONE CALL	GUELPH
2018250153	7/9/2018 9:06:45 AM	7/19/2018	ONTARIO ONE CALL	GUELPH
20182813583	7/11/2018 9:58:21 AM	7/18/2018	ONTARIO ONE CALL	GUELPH
20183215423	7/30/2018 8:21:10 AM	8/16/2018	ONTARIO ONE CALL	GUELPH
20182821001	7/12/2018 2:02:17 PM	7/19/2018	ONTARIO ONE CALL	NORFOLK

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Clicking will minimize the search fields

Search form fields: Ticket #, Received date (07/01/2018), End date (07/31/2018), Company name (ONTARIO ONE CALL, ONTA), Caller name, Contractor code (188110, 12345), Mun./Twsp, Street, Address, Remarks, Type of work, Project #.

Search filter menu: Sort A to Z, Sort Z to A, Sort by Color, Clear Filter From "Street", Filter by Color, Text Filters.

Search results: (Select All), CONROY CRES, COOPER DR, DECATUR PLACE, REVELL DR, RUSHLEY DR, TURKEY POINT RD.

Buttons: Reset, Export, Search, OK, Cancel.

Our recommended Best Practice for managing Locate Requests:

- ✓ Each user should ensure their contact information is correct each time they create a request; if an infrastructure owner (member) or Ontario One Call has a question they are going to call the main contact first.
- ✓ Use a distribution email when your team requires shared access to locate paperwork.
- ✓ Include an “estimated completion date” in the detailed description for long term Projects
- ✓ Follow up with Ontario One Call when you do not receive a locate request confirmation within 24 hours.
- ✓ Keep a record of your locate requests – use the available Search Engine and Export features.
- ✓ Check the Locate status tab on each request and follow up with Members directly when you have not received a response.

