



RULIS Utilities: Login and Registration (External Users)

A RULIS Job Aid

Roles Impacted

External Consultants Utility Owner Last Revised

April 2024





Introduction

The Utility Permit module of RULIS includes functionality for external users to create and manage individuals and companies. These individuals and companies are referenced when creating an application for a utility permit. This job aid describes the process when logging on for the first time, creating a new company, applying to become a member of an existing company, applying to link your company organizational unit to another company organizational unit, and approving a request to become a member of or link to your company.

Use this job aid to perform the following steps:

All Users: Logging on for the First Time

After logging in:

If your Utility or Consulting company is not created in RULIS, follow these steps:

<u>Creating a New Company</u>

If your Utility or Consulting company is created in RULIS, follow these steps:

• Individual: Joining an Existing Company as a Member

To link companies in order to access permit applications from that company, follow these steps:

• **Company:** Applying to Link to an Existing Company

To approve a request to link to your company, follow these steps:

• Approving a Request from an Individual to Join your Organizational Unit as a Member

Only required if the person's email address does not have your company's name as the domain, (example: <u>yourname@yourcompanysname.com</u>).

• Approving a Link Request to Your Company from Another Company







Logging on for the First Time

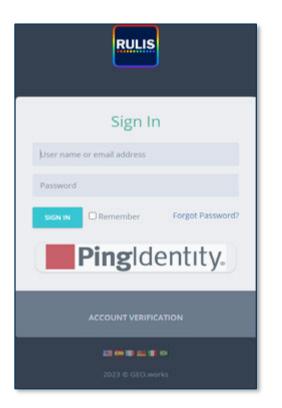
When logging in to the utility permit module of RULIS for the first time, follow the steps below.

1. Click the RULIS Login link from the <u>TxDOT.gov</u> website,



2. The Sign In page appears.

Click Pingldentity.







The Sign On page appears.

Sign On
EMAIL ADDRESS
Next

- 3. Enter your Email Address and click Next.
- The **Password** field and other options appear.

Sign On	
EMAIL ADDRESS	
PASSWORD	
Sign On Change Password? Trouble Signing On?	
Don't have an account? Register now	





4. Click Register now.

The Create Your Account page appears.

EMAIL ADDRESS	
shannonmocartyem	ali@gmail.com
FIRST NAME	
I	
LAST NAME	
TELEPHONE NUMBE	R
1	
PASSWORD	
1	٩
	Create Account
	Cancel

- 5. Enter a First Name.
- 6. Enter a Last Name.
- 7. Enter a Telephone Number.
- 8. Enter a Password.

The password based on TxDOT IT requirements:

- Contain at least 16 characters
- Contain maximum 32 characters
- Password must not be the same as the last **24** passwords used.
- The minimum time after a password change before the user can change it again is **1** day.
- The maximum time a user can continue using the same password before it must be changed is **180** days.

Users are required to log in every **180** days to **maintain** their account in acitve status. Accounts will be automatically locked after **180** days of inactivity. If prompted to contact the site or system administrator, email <u>ROW Applications Helpdesk@txdot.gov</u> for assistance.



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9. Click Create Account.

The **Email Verification** page appears.

	Email Verification
A verification email has code here.	been sent to shannonmccartyemail@gmail.com. Please check your email and enter the security
	Enter Security Code
	Need a new code? Resend
	Continue
	Cancel
	Manage Profile

10. Enter the security code sent to your email and click **Continue**.

The **Registration Flow** page appears.

You are not part of a company organization unit, please apply to the company organization unit you work for (your direct employer). If your company is not on the list, please register a new company.	Registration Flow
	organization unit you work for (your direct employer). If your company is not on the list, please register a new company.

11.Click **Continue**.



Creating a New Company

After logging in:

If your Utility or Consulting company is not created in RULIS, follow these steps:

The Select the company organization unit you work for (your direct employer) to request admission page appears.

Search			9
elect	 Companies/Individuals 	 Organizational Unit 	V Organizational Unit Manager V
✓ APPLY		Austin Permitting	TREY TURNER
APPLY		City of Conroe	Keith Petru
APPLY		Default 11459-202371618364	Jennifer Walter - Managers: Jennifer Walter
V APPLY		Default 11521-202371020269	Chad Leingang - Managers: Chad Leingang
APPLY		Default 11609-20237165914	Scott Holden - Managers: Scott Holden
V APPLY		Default 11747-202371023958	Janelle Hagen - Managers: Janelle Hagen
APPLY		Default 11763-202371023213	OCTAVIO RANGEL - Managers: OCTAVIO RANG
APPLY		Default 11763-202371033585	OCTAVIO RANGEL - Managers: OCTAVIO RANG
V APPLY		Default 11834-202371621481	Lisa Walker - Managers: Lisa Walker
✓ APPLY		Default 11834-202371727235	Lisa Walker - Managers: Lisa Walker
✓ APPLY		Default 11863-20237925858	Scott DeBerry - Managers: Scott DeBerry
✓ APPLY		Default 11881-202371533195	Oscar Uribe - Managers: Oscar Uribe
✓ APPLY		Default 12048-202371020503	Obed J Miramontes - Managers: Obed J Miram
✓ APPLY		Default 12095-20237149731	Mears MCI - Managers: Mears MCI
¥ APPLY		Default 12104-202371714618	jack Greer - Managers: jack Greer
¥ APPLY		Default 12149-202371544398	joel Valdez - Managers: Joel Valdez
✓ APPLY		Default 12310-202371431364	LAURA WALIGURA - Managers: LAURA WALIGU
¥ APPLY		Default 12370-2023792648	Tracy Odom - Managers: Tracy Odom
		6.6. h 19195 \$55591511511	Para Maria Maria Para Maria

- **12.** To ensure the company does not already exist, enter the company name in the **Search** field and click
- 13. To create a new company organization, click Next.

The Create Contact page appears.

Individual is used when a company already exists in the RULIS system. When using this option, you will only request to be a member.
 (i.e. employees of the public utility or consultant company with the same email domain address)

Create contact	
INDIVIDUAL	COMPANY

Company is used when a company does not exist in the RULIS system and should be created. (i.e. consultant company or public utility company)





14.Click **Company**.

The Create contact window changes to include four tabs on the Contact main tab:

- Company Name
- Contact Information

- Company Address
- Billing Address

Create contact					
Contact Organ	izational Units				
Company Name	Contact Information	Company Address			
Company Name					
				CANCEL	B SAVE

All required fields must be completed to save the contact. A banner appears at the top of the window stating "**Data Incomplete or Missing**" if any required fields are incomplete.

Company Name

(!)

1. Enter a Company Name.

Contact Information

- 2. Enter a First Name.
- 3. Enter a Last Name.
- 4. Enter a Role (not required).
- 5. Enter a Telephone.
- 6. Enter a Mobile Phone (not required).
- 7. Enter an Email.

Company Address

- **15.**Enter a **Mailing Address**. (up to 3 lines)
- 16. Enter a Zip Code, a City, and a State.
- 17. Enter a Telephone and an Email.







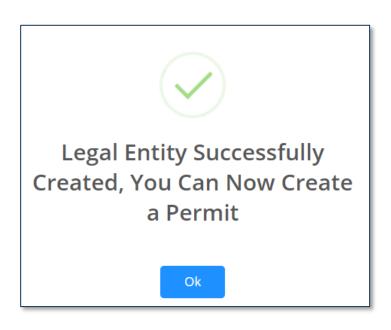
Billing Address

- If the Billing Address is the **same** as the address entered on the previous tab, leave the checkbox checked.
- If the Billing Address is **not the same** as the address entered on the previous tab, click the checkmark to remove it and enter a different address, zip code, city, state, and contact information.

18.Click SAVE.

The message page appears.

19.Click Ok.



The new organization contact appears in the table on the **Companies/Owners/Contacts** page and is now available for reference when creating a utility permit application.





Individual: Joining an Existing Company as a Member

If your Utility or Consulting company **is already created** in RULIS, follow these steps:

1. The Select An Organization Unit page appears. If it does not, click Company Organizational Units and Linked Companies in the menu bar and click Apply to an Existing Company Organizational Unit.

earth			1
lect	 Companies/Individuals 	 Organizational Unit 	 Organizational Unit Manager
APPLY		Austin Permitting	TREY TURNER
APPLY		City of Conroe	Keith Petru
APPLY		Default 11459-202371618364	Jennifer Walter - Managers: Jennifer Walter
APPLY		Default 11521-202371020269	Chad Leingang - Managers: Chad Leingang
APPLY		Default 11609-20237165914	Scott Holden - Managers: Scott Holden
APPLY		Default 11747-202371023958	Janelle Hagen - Managers: Janelle Hagen
APPLY		Default 11763-202371023213	OCTAVIO RANGEL - Managers: OCTAVIO RANG.
APPLY		Default 11763-202371033585	OCTAVIO RANGEL - Managers: OCTAVIO RANG.
APPLY		Default 11834-202371621481	Lisa Walker - Managers: Lisa Walker
APPLY		Default 11834-202371727235	Lisa Walker - Managers: Lisa Walker
APPLY		Default 11863-20237925858	Scott DeBerry - Managers: Scott DeBerry
APPLY		Default 11881-202371533195	Oscar Uribe - Managers: Oscar Uribe
APPLY		Default 12048-202371020503	Obed J Miramontes - Managers: Obed J Miram
APPLY		Default 12095-20237149731	Mears MCI - Managers: Mears MCI
APPLY		Default 12104-202371714618	Jack Greer - Managers: Jack Greer
APPLY		Default 12149-202371544398	joel Valdez - Managers: joel Valdez
APPLY		Default 12310-202371431364	LAURA WALIGURA - Managers: LAURA WALIGU.
APPLY		Default 12370-2023792648	Tracy Odom - Managers: Tracy Odom
		1. IL. IL CALLS ANALYSI ALL I	Phone March - Marchan Phone March

- 2. Enter the company name in the **Search** field and click \bigcirc .
- 3. Click **Apply** next to the desired company.

The Add Message page appears.

Add Message	
Message	
	<i>I</i>
	CANCEL SAVE

4. Enter a **message** to accompany your request.



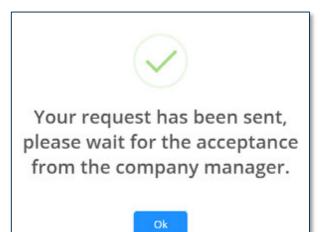






5. Click Save.

The message appears that your request has been added.



6. Click Ok.

O To view your request status, click **Organization Units** in the menu bar.



If your email address has your company's name as the domain, (example: <u>yourname@yourcompanysname.com</u>), a separate validation step is not required.

Otherwise, please wait to be accepted before creating a permit as a member of an organizational unit.







Company: Applying to Link to an Existing Company

If you are a utility consultant creating a permit on behalf of a utility owner, you will want to follow these steps to apply to link your organizational unit to the public utility company's organizational unit.

1. From the home page, click Company Organizational Units and Linked Companies in the menu

bar.

The Organizational Units page appears.

An P Apply for a Permit (3) Applications * (3) Companies/Owners/Contacts (3) Organ	lizational Units and Linked Companies	? Support ~ 🖿 ~ 🛛 🕒	1
Company Organizational Units and Linked Companies 😯	ORGANIZATIONAL UNIT NAME: ORGANIZATIONAL UNIT OWNER:		
To submit permits on behalf of another company, click an organizational unit on the left pane and go to the linked co	impany organizational units tab on the right pane. Click the button "+ LINK COMPANY ORGANIZATIONAL UNIT" to	request the link.	
Search			
ORGANIZATION CHART			
+ APPLY TO AN EXISTING COMPANY ORGANIZATION UNIT			
Utility AABB - John Griffin,Rich Truitt,1561 - test test - Utility AABB (\$4) (\$103)(2			
GEO.works International inc Richard Manser - CEO Department (▲1) (im1)[3	Please select a company organizational unit from the left panel		
	r tease sector a company or gamma and room one tert parts		

- 2. Click your **Company** on the left panel.
- 3. Click the Linked Company Organizational Units tab.

P Apply for a Permit (3) Applications * 3 Companies/Owners/Contacts (3) Organia	zational Units and Lin	iked Companies		? Support ~ 🖿 ~ 0 🔕	1
Company Organizational Units and Linked Companies 😗	ORGANIZATIONAL	L UNIT NAME: UTILITY AABS L UNIT OWNER: ADMIN tab on the right pane. Click the button	- LINK COMPANY ORGANIZATIONAL UNIT to reques	it the link.	
Search	? Info - re	quest link		7 PENDING REQUESTS	s
ORGANIZATION CHART	A Members	le Companies/Individuals	Uniked Company Organizational Unit	5	
+ APPLY TO AN EXISTING COMPANY ORGANIZATION UNIT	Actions Lins.	Companies/Individuals	 Organizational Unit 	Approved By	
Utility AABB - John Griffin,Rich Truitt,1561 - test test - Utility AABB (🚢 4) (🖢 3) (2 & GEO.works International inc Richard Manser - CEO Department (🚢 1) (🖿 1) (3					



The Search for the company organizational unit and click apply pop up appears.

Search			0
elect ~	Companies/Individuals	 Organizational Unit 	Organizational Unit Manager
✓ APPLY		Austin Permitting	TREY TURNER
\$ APPLY		Brownsville Public Utilities Board	Brian Garza
V APPLY		Capco Telecom	Robert Dalton - Managers: Robert Dalton
¥ 489.Y		City of Conroe	Keith Petru
APPLY		City of Karnes City	Veronica Butler - Managers: Veronica Butler
APPLY		City of Lockhart	Ethan Chierici
APPLY		Default 11466-202382635827	Lee Downey - Managers: Lee Downey
APPLY		Default 11521-202392018998	Chad Leingang - Managers: Chad Leingang
* APPLY		Default 11592-20239448442	Martin Martinez - Managers: Martin Martinez
* APPLY		Default 11609-202382131506	Scott Holden - Managers: Scott Holden
✓ APPLY		Default 11736-20231085621	Siglinda West - Managers: Siglinda West
✓ APPLY		Default 11861-202392733631	Jackson Chapman - Managers: Jackson Chapm
* APPLY		Default 11900-202391935434	Amanda Pacheco - Managers: Amanda Pacheco
* APPLY		Default 11900-202391944311	Amanda Pacheco - Managers: Amanda Pacheco
* APPLY		Default 11944-20238284013	ERIK MCGREGOR - Managers: ERIK MCGREGOR
		Pale 8 13105 30386138661	Confiderate Managerer Confiderate

- 1. Enter the Company Name in the Search field.
- 2. Click the **magnifying glass** to complete the search.
- 3. Click Apply next to the desired company.

The Add Message page appears.

Message	

- 4. Enter a **message** to send to the company manager to ask to accept your request to share utility permit application information.
- 5. Click Save.





The **Request Added** message appears.

P Apply for a Perrit (3) Applica	sons 🐃 🕼 Campanies/Owners/Contacts 🌐 Organizational Units		0			🖌 with	ngural has bren sent, please in the acceptance from the
Company Organizational	Units and Linked Companies 🔞		L UNIT NAME DEFAULT 11207 L UNIT OWNER: SHANNONIMC			europ	any managar.
Search						GANZATIONIS UNITS	7 PENDING HEQUESTS
ORGANIZATION CHART	+ APPLY TO AN EXISTING COMPANY ORGANIZATION UNIT	L Members	Companies in duals and	Purked company organization unit	F		
	- Default 11207-20235306488 (2, 1) (Se 102 -	Actions LL.7	Name	 Approved By 	- view Userst. V	fear L E ···	
	MoCarty - Default 11214-30235903220 (👗 2) (🖿 1) + lab MoCarty - Shannon's Utility Company 4 June 20, 2023 13:54 PM +			I			

To view your request status, click **Organization Units** in the menu bar.

- To view your request status, select the Organizational Unit that you applied to and click Pending Requests.
 - The **Pending Requests** page appears.

Companies/Owners/Contacts ~	Name	~	Request Date ≚.	Туре	~
Shannon's Utility Company 5 - Sha	OU 2327 Deleted		2023-06-23	Member Request Sent	
Shannon's Utility Company 4 - Tab	OU 2328 Deleted		2023-06-27	Member Request Sent	

2. Click Close.

U



Approving a Request from an Individual to join your Organizational Unit as a Member

This is only required if the person's email address does not have your company's name as the domain, (example: <u>yourname@yourcompanysname.com</u>).

To approve an individual's request to link to your company, follow these steps:

- 1. Click Organizational Units and Linked Companies in the menu bar.
- 2. Click the **folder** for your organization on the left.

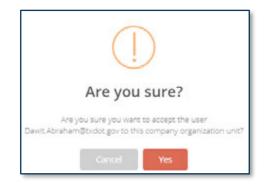
The right panel displays the **requests**.

IGANIZATIONAL I	UNIT OW		NAGEMENT {{DALLAS}}					
? info-req	uest link					+ ADD A MEMBE		? PENDING REQUESTS
≜ Members	la Corr	penies/Individuels @Linked Con	npeny Organizational Units					
Action ~	ы ч	User Name	Email Address	÷	Phone Number ~~~~	Shared Contacts	Can Manage 0.0. at	
	14310	📃 Ashton Strong@txdot.gov	Ashton.Strong@txdot.gov					
	15659	📒 Bryan. Esmail Doki@txdot.gov	Bryan.Esmail/Doki@txdot.gov			0	0	
	15658	Chalkou.Bah@txdot.gov	Chaikou.Bah@txidot.gov			0	0	
	11222	2 Corinna Ciark@txdot.gov	Corinna.Clark@txdot.gov				8	
	13979	Derius Haggard@txdot.gov	Darius Haggard@txdot.gov			0	0	
	11456	1 Deria Payberah@txdot.gov	Daria.Payberah@txidot.gov			0	0	
× ×	16013	Denit Abraham@txdot.gov	Please add me					
		-						

The message from the Applicant appears in the Email Address field until it is accepted.

- 3. Click the **blue checkmark** to **accept** the request.
- 4. Click the **red x icon** to **reject** the request.

If the request is accepted, the Are you sure? page appears.



5. Click Yes.





The individual displays as a Member, and the Email Address field is populated.

	ORGANIZATIONA		NAME:	UTILITY AABB				
Company Organizational Units and Linked Companies 😮	ORGANIZATIONA							
submit permits on behalf of another company, click an organizational unit on the left pane and go to the linked co	mpany organizational units	tab on th	he right pa	ine. Click the button '+ UNK COMP	WAY ORD	ANZATIONAL UNIT to request the link.		
Search	7 Info - m	quest	link				PENDING REQUES	5
	and the second							
				New 200 100 100 100 100 100 100 100 100 100				
ORGANIZATION CHART	& Members	le:	Compani	ies/Individuals &Linke	d Comp	pany Organizational Units		
ORGANIZATION CHART + APPLY TO AN DUSTING COMPANY ORGANIZATION UNIT	-	1.000						
	-	1.000		ies/Individuals <i>Ø</i> Linke ver Name		Email Address	 Phone Number 	• •
	-	v Id	~ Us	er Name		Email Address	 Phone Number 	• •
+ APPLY TO AN EXISTING COMPANY ORGANIZATION UNIT	-	1.000	~ Us				 Phone Number 	•
+ APPLY TO AN EXISTING COMPANY ORGANIZATION UNIT	-	v Id	~ Us	er Name		Email Address	Phone Number 000	

You can **select** the checkbox to allow the member to:

- 6. Shared Contacts Can modify the shared contacts.
- 7. Can Manage O.U. Can manage the organizational unit (can delete or add people to the group

and receive email notifications to complete Utility Owner Acknowledgement)

To add additional members to your organization,

- 8. Click Add a Member and remove.
- 9. Enter user email address.
- 10.Click **OK**.

The permit creator must add the contact to the permit in order for the application to be shared with that specific member of the <u>company</u>.





Approving a Link Request to Your Company from Another Company

To **link** a Company Organizational Unit (so that a consulting company can create/manage permit applications for a public utility company), follow these steps. Only a manager of an organizational unit can **accept** or **reject** a request to be a member of the organizational unit/request for **Linked Company Organizational Unit**. This will allow you to share permit applications.

- 1. From the home page, click **Organizational Units** in the menu bar.
- 2. Click the Linked company organization units tab.

🐝 🔎 Apply for a Permit 🖄 Applications 👻 🧟 Companies/Owners/Contacts 🗐 Organi	zational Units and Linked Co	ompanies		? Support ~ 🖿 ~ 🛛 🕚	1
Company Organizational Units and Linked Companies 😗	ORGANIZATIONAL UNIT ORGANIZATIONAL UNIT spany organizational units tab on t	OWNER: ADMIN	LINK COMPANY ORGANIZATIONAL UNIT 10 IN	equest the link.	
Search	? Info - request	link		? PENDING REQUES	575
ORGANIZATION CHART	A Members In	Companies/Individuals	Linked Company Organizational	Units	
+ APPLY TO AN EXISTING COMPANY ORGANIZATION UNIT	Actions Ling. Comp	anies/Individuals	 Organizational Unit 	 Approved By 	
Utility AABB - John Griffin Rich Truitt, 1561 - test test - Utility AABB (3 4) (3 4) (3 2 2 3 2 4 3 4 3					

The message from the company appears in the **Approved By** field until it is accepted.

- 3. Click the **blue checkmark** to accept the request.
- 4. Click the **red x** icon to reject the request.

If the request is accepted, the Are you sure? page appears.



5. Click Yes.

The company displays as accepted and the **Approved By** field is populated.

