RULIS Utilities: Login and Registration (External Users)
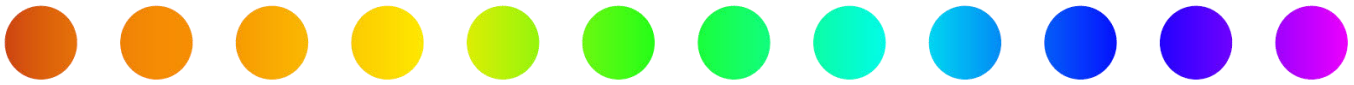
A RULIS Job Aid

Roles Impacted

External Consultants
Utility Owner

Last Revised

April 2024

UTILITY PERMIT CONTACT

A **RULIS** JOB AID

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:

- Creating a New Company

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: yourname@**yourcompanysname**.com).
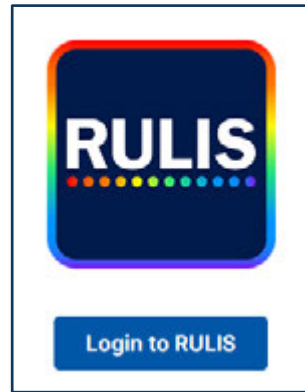
- Approving a Link Request to Your Company from Another Company
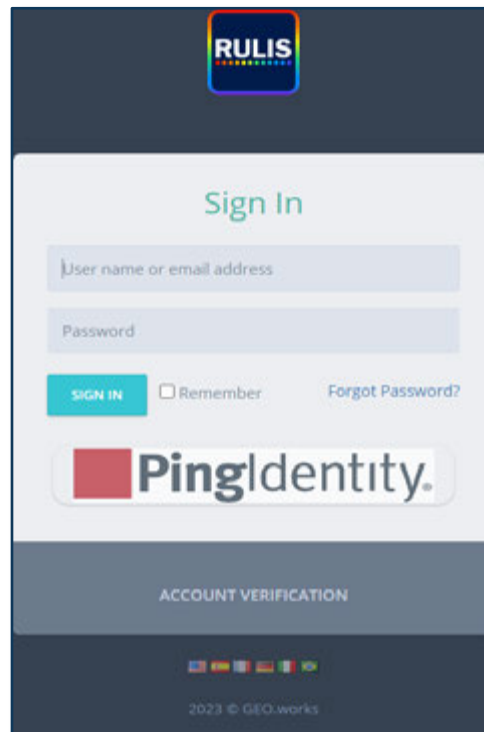
A **RULIS** JOB AID
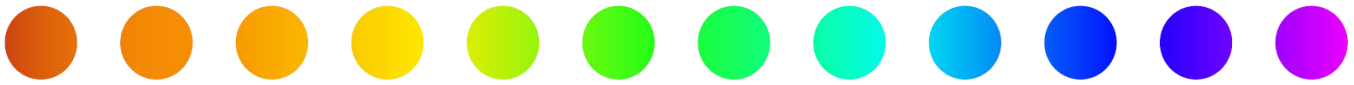
Logging on for the First Time

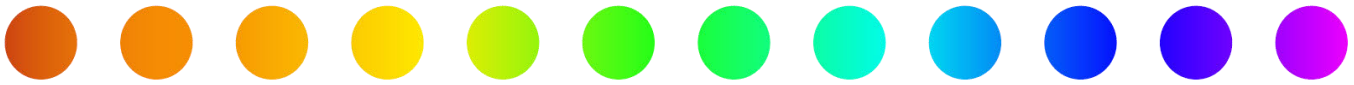When logging in to the utility permit module of RULIS for the first time, follow the steps below.

1. Click the RULIS Login link from the **TxDOT.gov** website,

2. The **Sign In** page appears.

    Click **PingIdentity**.

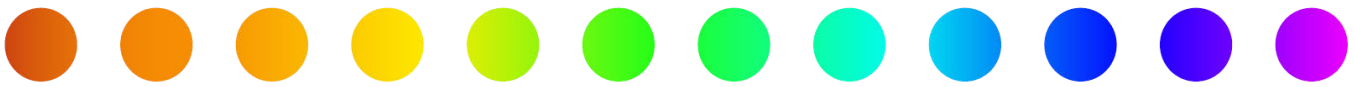A **RULIS** JOB AID

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The **Sign On** page appears.

3. Enter your **Email Address** and click **Next**.

The **Password** field and other options appear.

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4. Click **Register now**.

The **Create Your Account** page appears.

5. Enter a **First Name**.

**6.** Enter a **Last Name**.

7. Enter a **Telephone Number**.

8. Enter a **Password**.
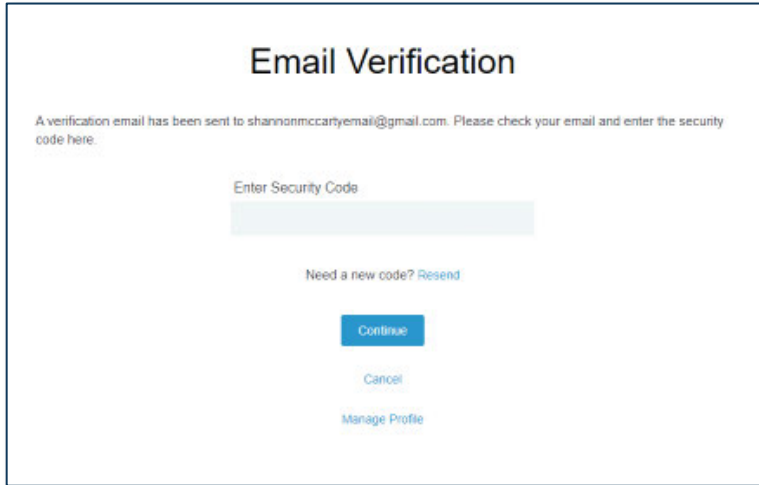
The password based on TxDOT IT requirements:

- 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 ROW_Applicaitons_Helpdesk@txdot.gov for assistance.
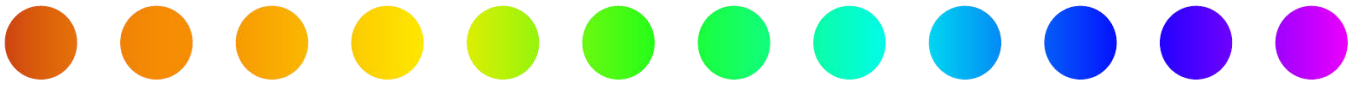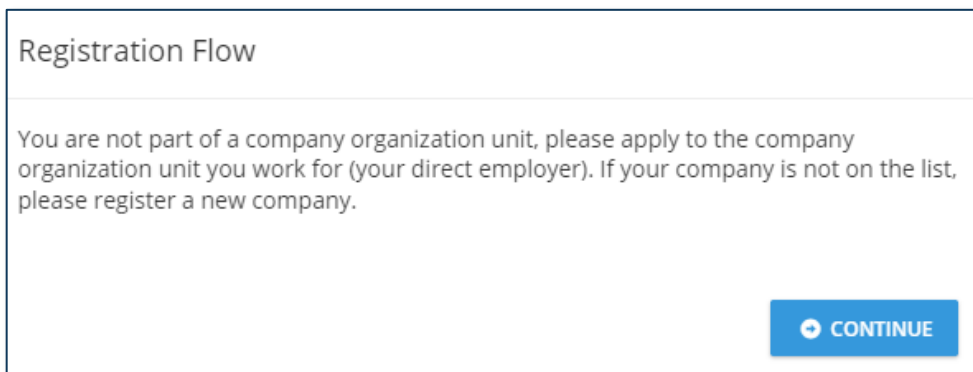
9. Click **Create Account**.

The **Email Verification** page appears.

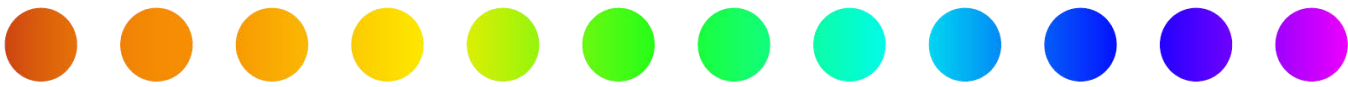
10. Enter the security code sent to your email and click **Continue**.

The **Registration Flow** page appears.

11. Click **Continue**.

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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.

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)**

✓ **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)**

A **RULIS** JOB AID
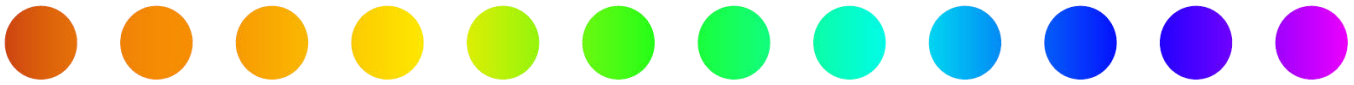
14. Click **Company**.

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 | Organizational Units |

| Company Name | Contact Information | Company Address |

Company Name

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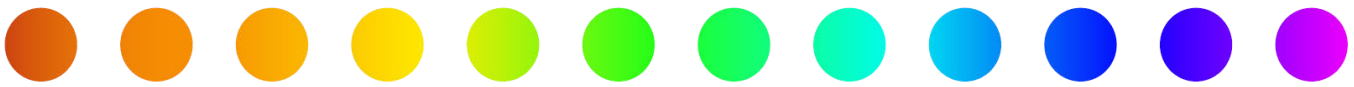
2. Enter a **First Name**.
3. Enter a **Last Name**.
4. Enter a **Role** (not required).
5. Enter a **Telephone**.
6. Enter a **Mobile Phone** (not required).
7. Enter an **Email**.

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**.

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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**.

Legal Entity Successfully Created, You Can Now Create a Permit

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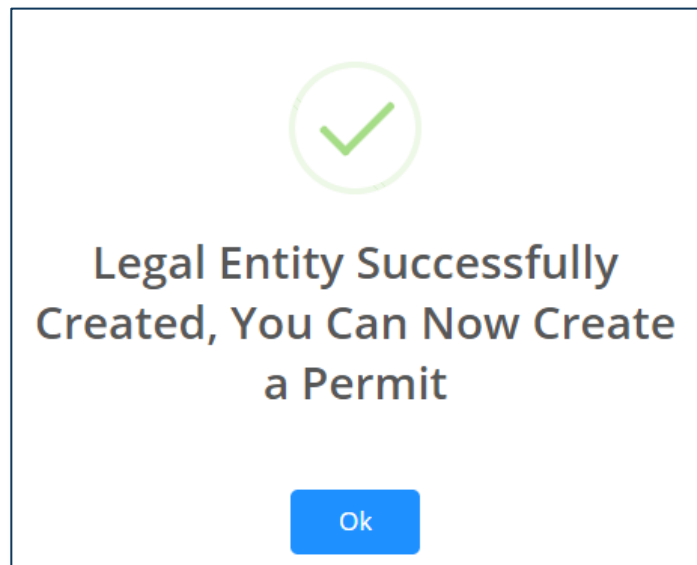
The new organization contact appears in the table on the **Companies/Owners/Contacts** page and is now available for reference when creating a utility permit application.

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**.

Search for your organizational unit within your employer's company and click apply. If you're not part of a company and registering as an individual, click NEXT.

Select	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 11521-2023T1020269	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

BACK

If your company is not registered click NEXT.
If you have questions about your company's organizational unit, contact the organizational unit manager before completing your registration.

NEXT

2. Enter the company name in the **Search** field and click 🔍 .
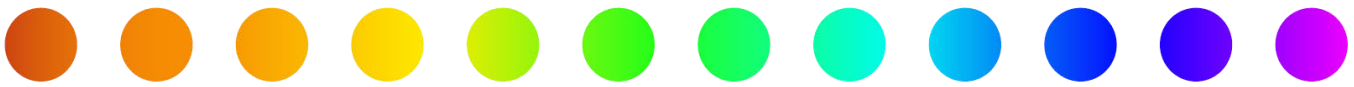3. Click **Apply** next to the desired company.
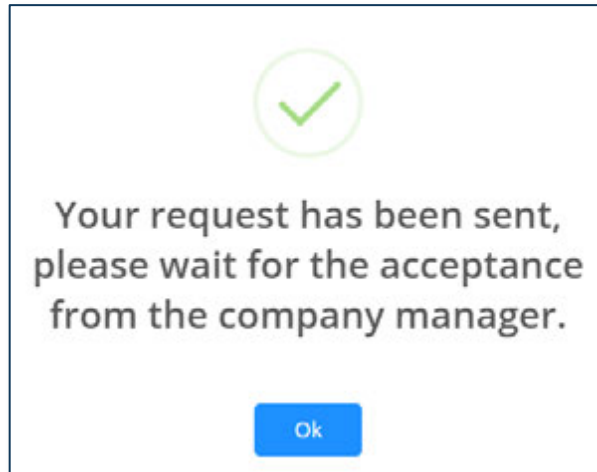
The **Add Message** page appears.

Add Message

Message

CANCEL   💾 SAVE

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

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5. Click **Save**.

The message appears that your request has been added.

Your request has been sent, please wait for the acceptance from the company manager.
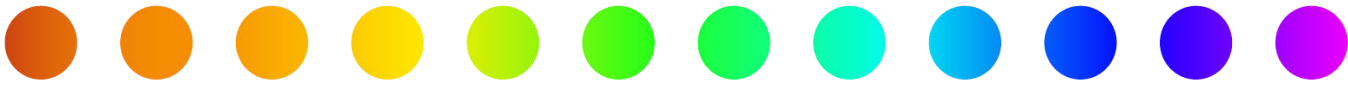
6. Click **Ok**.

✅ 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: yourname@yourcompanysname.com), a separate validation step is not required.

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

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## 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.

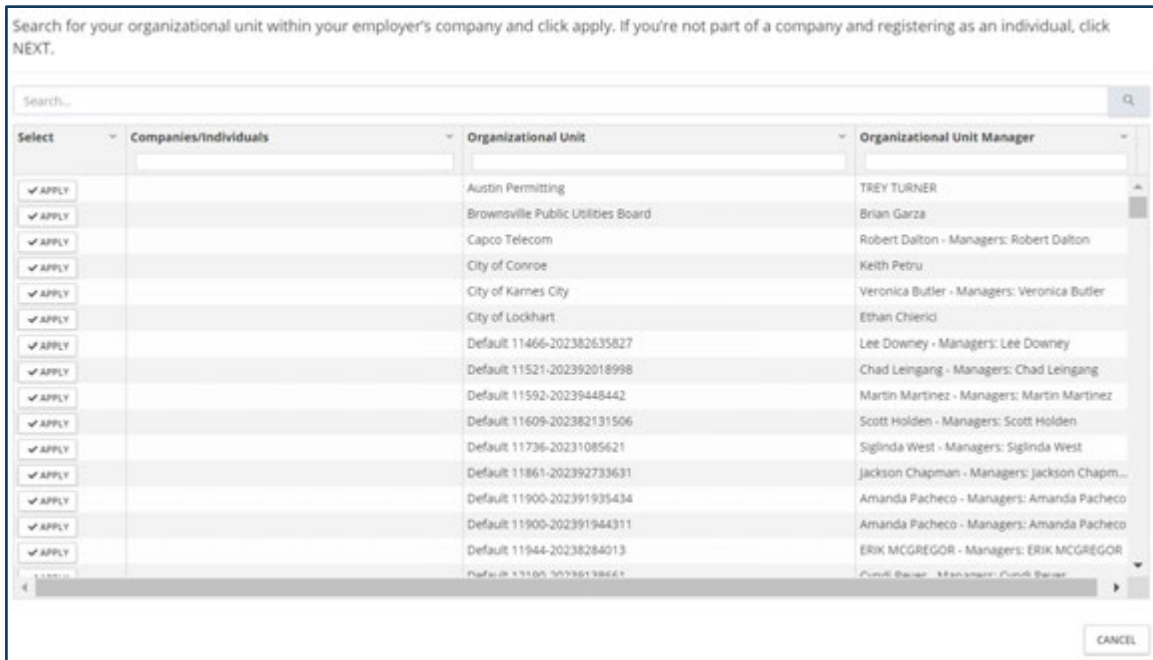   The **Organizational Units** page appears.
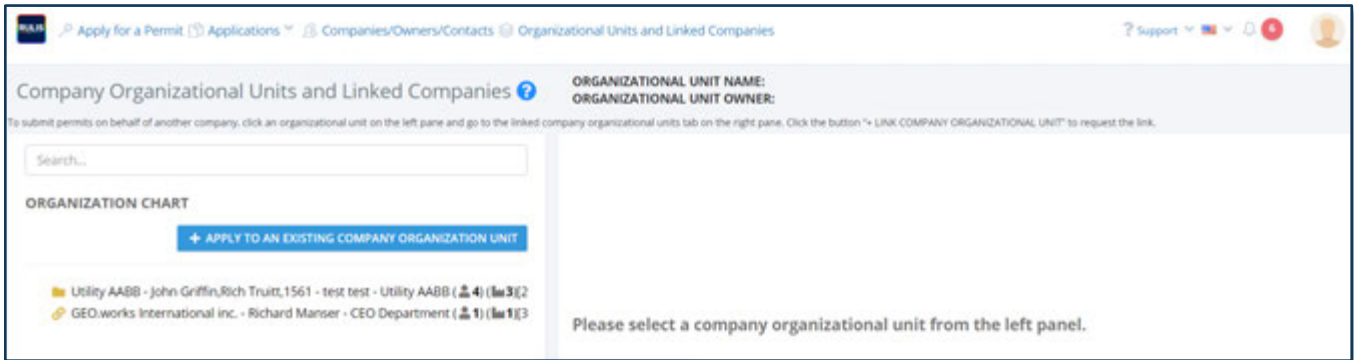
2. Click your **Company** on the left panel.
3. Click the **Linked Company Organizational Units** tab.

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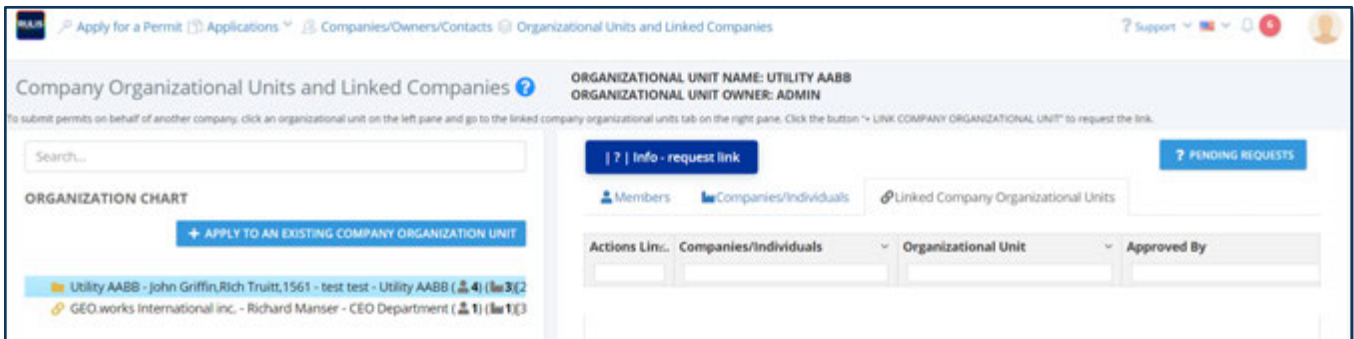
4. Click **+ Link Company Organizational Units**.

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

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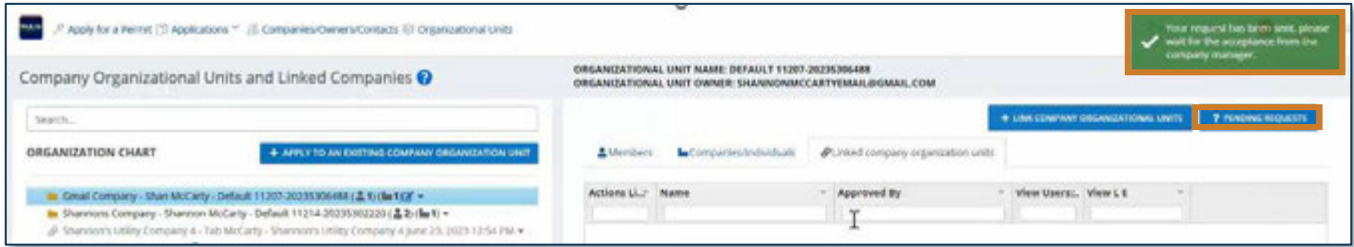3. Click **Apply** next to the desired company.

The **Add Message** page appears.
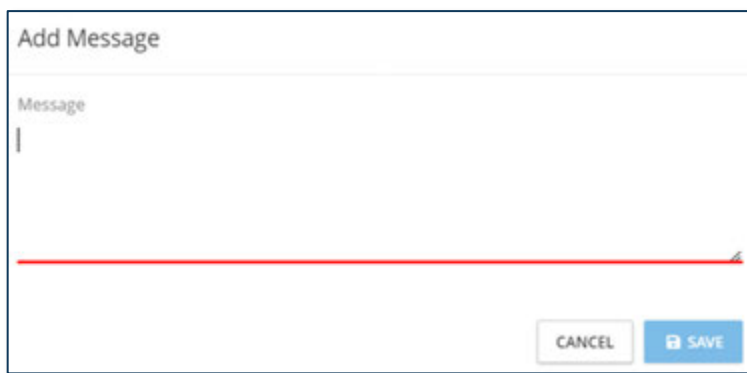
4. Enter a **message** to send to the company manager to ask to accept your request to share utility permit application information.
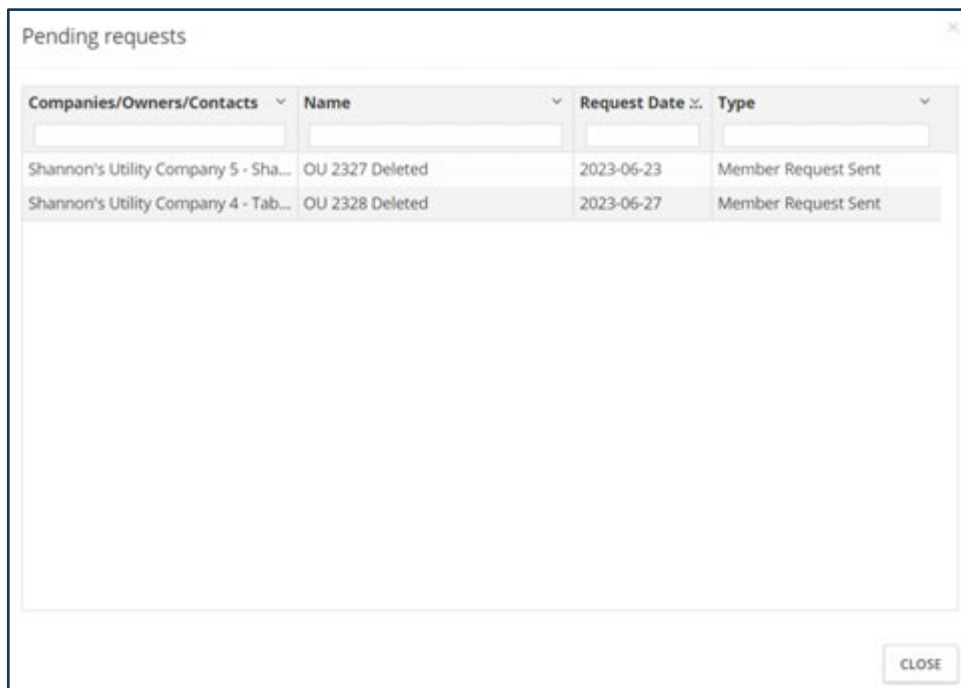5. Click **Save**.

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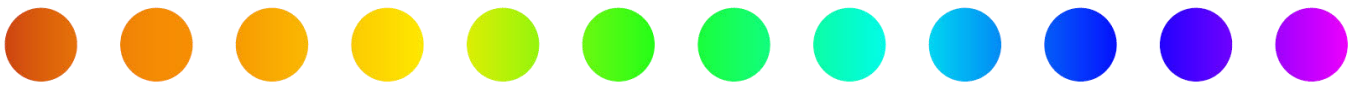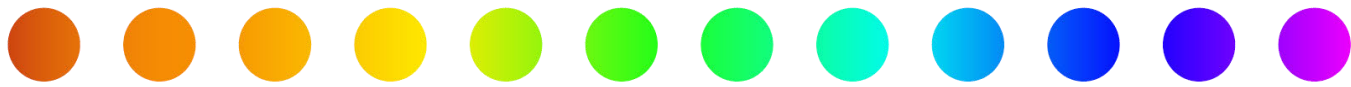
The **Request Added** message appears.

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

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

   The **Pending Requests** page appears.

2. Click **Close**.

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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: yourname@yourcompanyname.com).

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.
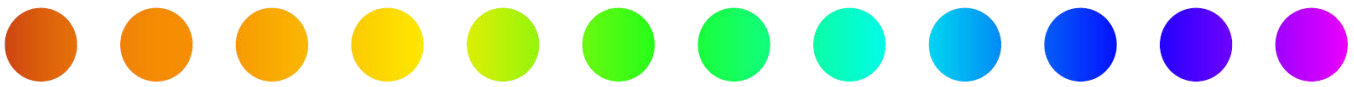
   The right panel displays the **requests**.

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

3. Click the **blue checkmark** to **accept** the request.

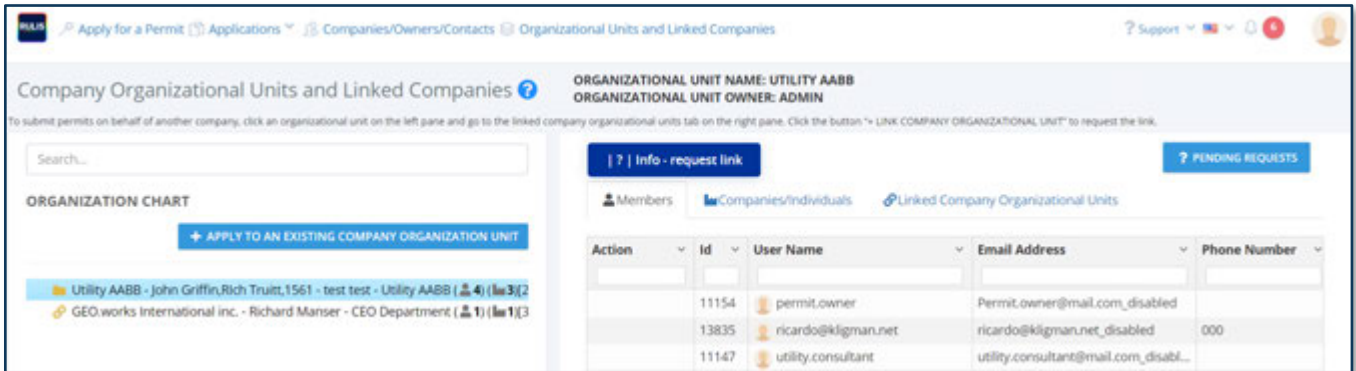4. Click the **red x icon** to **reject** the request.

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

5. Click **Yes**.

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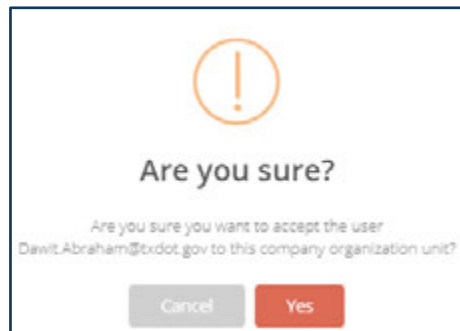
The individual displays as a **Member**, and the **Email Address** field is populated.

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**)
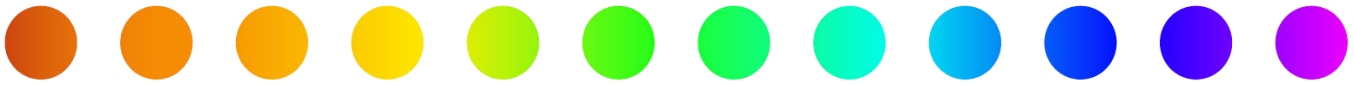
To add **additional members** to your organization,

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 company.

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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.
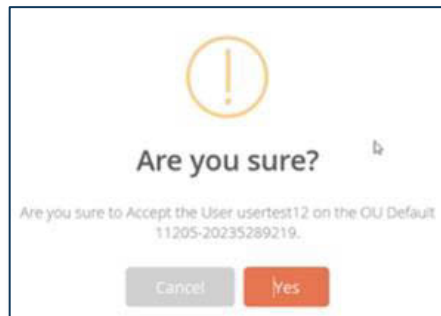
1. From the home page, click **Organizational Units** in the menu bar.

2. Click the **Linked company organization units** tab.
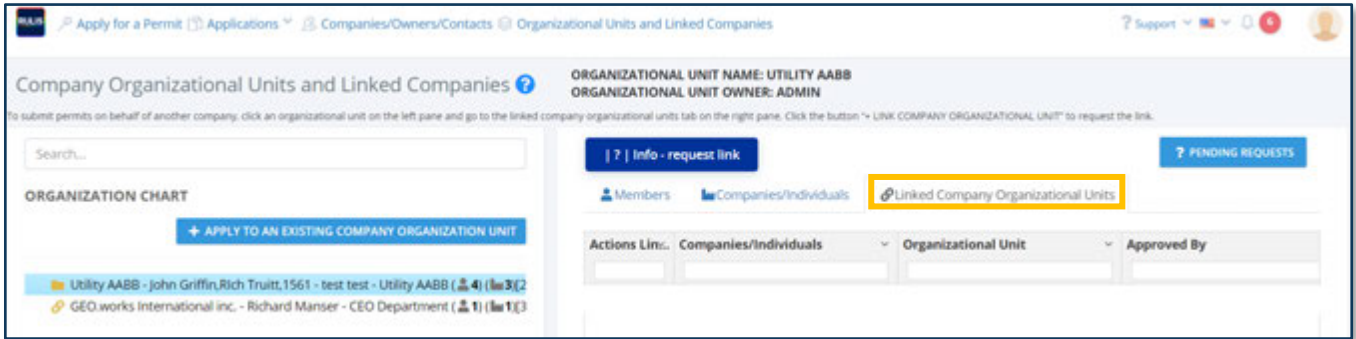
The message from the company appears in the **Approved By** field until it is accepted.

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.

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