



Advanced Search & Reporting

A RULIS Job Aid

Roles Impacted

Utility Consultant
Utility Owner
District Permit Coordinator

Last Revised

August 5, 2024



Introduction

This job aid will explain how to use the Advanced Search and Reporting functionality in RULIS to create, save, and export reports. External RULIS users, including Utility Owners and Utility Consultants, are only able to create queries and export reports on their own utility permits. Internal RULIS users, including the District Permit Coordinator, can create queries and export reports on all permits in the system.

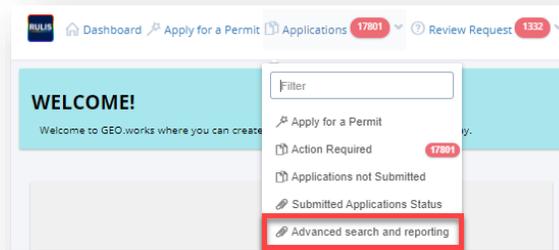
Process Overview

- [Create Reports](#)
- [Save Queries](#)
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- [Export Reports](#)

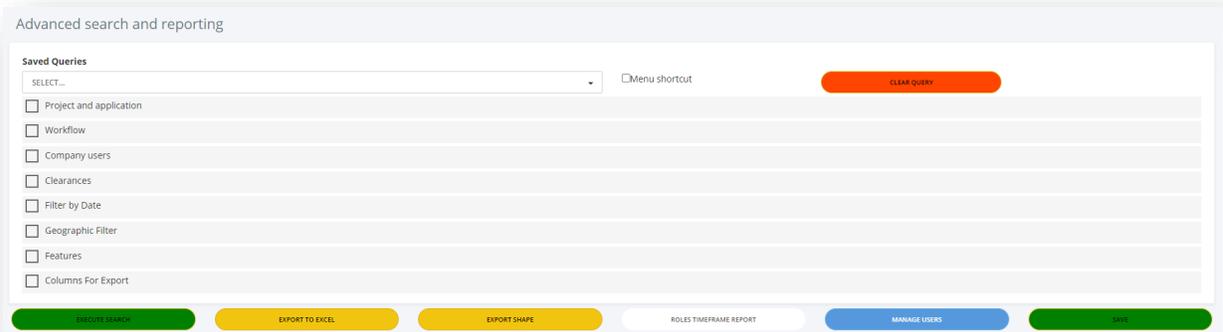


Create Reports

1. From the Applications dropdown, select **Advanced search and reporting**.



2. Select filters to narrow down the search results.
 - a. You can select as many filters as you want, but you will also be able to narrow down results later when you **Export to Excel**. This process is explained in the section [How to Export Reports](#).



Section	Field Name	Description
Project and application	Application Number	User-entry field. Enter a complete or partial utility permit application number.
	Utility Company Project Code	User-entry field. Enter a complete or partial Project Code that was used on the utility permit.



	Project – Title	User-entry field. Enter a complete or partial Project Code that was used on the utility permit.
	TxDOTCONNECT Utility ID	User-entry field. If the utility permit is for work on a TxDOT project, enter the TxDOTCONNECT Utility ID.
	Include Drafts	Checkbox. Select if you want to include drafts in your search results.
	Request form templates	Dropdown menu; multi-select. Select the type of application (i.e., Communication – Utility Permit).
Workflow	Assigned To Me	Checkbox. Select if you only want to see utility permit applications that are assigned to you.
	Status of the Application	Dropdown menu; multi-select. Select the status of the utility permit application(s).
	Search By: Date (From Date & To Date)	Date picker. Select the starting & ending date that you want to apply the query to (i.e., if you are looking for permits in a Status of Initial Review beginning on 01/01/2024 and ending on 07/01/2024, you will select January 1, 2024 in the From Date field and July 1, 2024 in the To Date field).
	Search By: Days elapsed in selected status	User-entry field. Enter the number of days that have elapsed since the permit was in the selected status(es). You can also select the checkbox “Show only if still in status.”
	Search By: Elapsed Days Since	User-entry field. Enter the number of days that have elapsed since the permit was in the selected status(es).
	Assigned user	Dropdown menu; multi-select. Select the assigned user(s) on the permit.



	User who changed the last status	Dropdown menu; multi-select. Select the user(s) that changed the previous status on the permit.
Company Users	Utility Owner	User-entry field. Enter a complete or partial name for the Utility Owner of the utility permit application(s).
	Utility Consultant	User-entry field. Enter a complete or partial Utility Consultant of the utility permit application(s).
	Organizational Units	Dropdown menu; multi-select. Select utility permit applications that are only associated with a specific Organizational Unit that you are a member of.
	Contractor Qualifications	Dropdown menu; multi-select. Select qualifications of the Contractor on the utility permit application(s), if applicable.
	Creator	User-entry field. Enter a complete or partial Creator of the utility permit application(s).
Clearances	Clearance Status	Dropdown menu; multi-select. Select the status of the clearance, if permit is under review by a Subject Matter Expert (SME).
	Review Request Organizational Units	Dropdown menu; multi-select. Select the Organizational Unit that review is pending with.
	Answer	Dropdown menu; multi-select. Select the answer from a SME review.
	Template	Dropdown menu; multi-select. Select the type of SME review on the utility permit application.
	Review Request Assigned To Me	Checkbox. Select if you only want to see utility permit applications that are waiting on a review that are assigned to you.
Filter by Date	Expected Date: From Today To ... -	Timeline. Drag the blue button to select a range of Dates on the utility permit application(s), beginning with today.



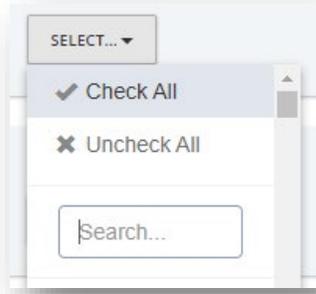
	Type of Date	Dropdown Menu. Select the Date field that you want to look at.
	Searching in Node Type	Dropdown Menu. Select where you want to look for the Date, either in the Application Summary or Traffic Limitation.
	From Date	Date picker. Select the starting date that you want to apply the query to (i.e., if you are looking for permits in a Status of Initial Review beginning on 01/01/2024, you will select January 1, 2024 in this field).
	To Date	Date picker. Select the ending date that you want to apply the query to (i.e., if you are looking for permits in a Status of Initial Review ending on 07/01/2024, you will select July 1, 2024 in this field).
Geographic Filter	Street	Dropdown menu; multi-select. Select the Street(s) where you want to locate utility permit applications.
	Search By	Checkboxes. Select Milepost, Street Number, Intersection, or Description. Description enables a user-entry field.
	City	Dropdown menu; multi-select. Select the City(ies) where you want to locate utility permit applications.
	District	Dropdown menu; multi-select. Select the District(s) where you want to locate utility permit applications.
	Department Route	Dropdown menu; multi-select. Select the Department Route(s) where you want to locate utility permit applications.
	Control Section	Dropdown menu; multi-select. The Control Section is a unique linear referencing method for locating features along a roadway. Select the Control Section(s) where you want to locate utility permit applications.



	County	Dropdown menu; multi-select. Select the County(ies) where you want to locate utility permit applications.
	General Provisions	
Features	Attribute	Dropdown menu. Select any attribute that you want to search for and enter the value.
	District Intersections	Dropdown menu. Select any district intersections that you want to search for and enter the value.
Columns for Export	Data fields available for export	Checkboxes. This section lists all data fields that are available for export. All columns are selected by default. You can uncheck Select all to unselect all the fields, and then multi-select only the fields you want to see on the export.
	Status of the Application – Admission	Dropdown menu; multi-select. Select one or more statuses of the application. A checkbox is enabled: 'Export the name of the user who sent the application to the selected status(es).'
	Status of the Application – Check Out	Dropdown menu; multi-select. Select one or more statuses of the application. A checkbox is enabled: 'Export the name of the user who sent the application to the selected status(es).'
	Answers to questions	Dropdown menu; multi-select. Select answers to specific questions from the utility permit application general questionnaire.



On multi-select dropdown menus, you will see the option to Check All, Uncheck All, or utilize a type-ahead Search box to quickly locate an item on the menu.



3. Select **Execute Search**.





Save Queries

Within the Advanced Search and Reporting tool in RULIS, you have the option to save the search criteria you entered as a custom query.

1. After you have selected your search filters using the steps above, select **Save**.



2. A box titled **Save Search Name** will display. Enter a **Name** for your query and select **Save**.

Save Search Name

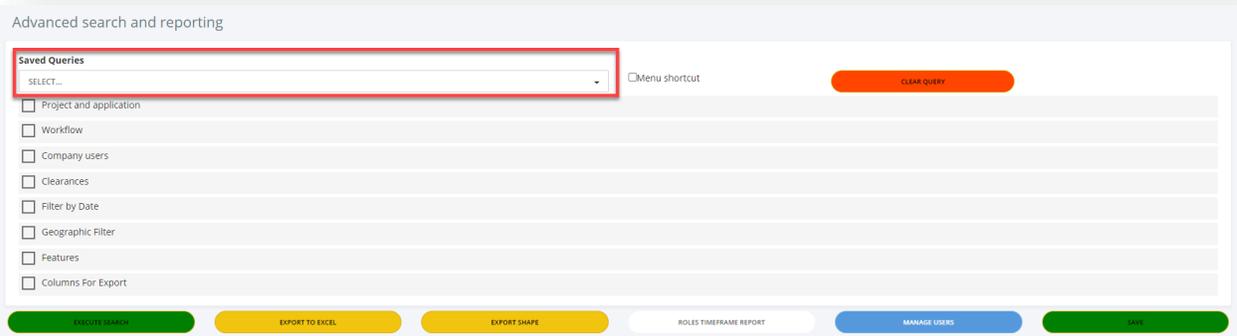
Name:



Run Saved Queries

From the Advanced Search and Reporting page, you can quickly run saved queries to retrieve permits that meet your pre-selected search criteria at any time.

1. Select the query that you want to run from the **Saved Queries** dropdown.



2. Select **Execute Search**.





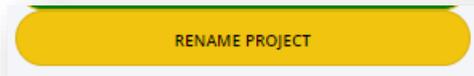
Edit Saved Queries

After you have selected a saved query, you also have the option to edit or delete the query.

1. To edit the saved query, simply change any filter(s) and select **Update**.



2. To edit the name of the saved query, select **Rename Project**, enter a new **Name**, and select **Save**.



Rename Search

Name:
Approved Permit Applications

CANCEL SAVE

3. To delete the saved query, select **Delete This Saved Search**.





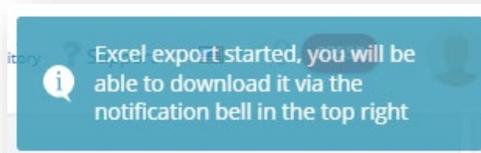
Export Reports

After executing your search, the utility permit application(s) that meet the criteria entered will display in a table on the Advanced Search and Reporting page. From this table, you only see a limited amount of information about the permit. You can use the text box below the title for each column to filter the results.

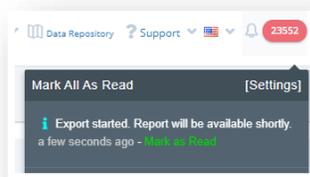
Action	Application Number	Status	Application Type	Utility Owner	Utility Consultant	Title
ACTION	00002/20240802/370423/443329/...	Permit Approved - Waiting for Constructio...	Electric - Utility Permit	Oncor Electric Delivery, LLC Distribution	POWER Engineers - Dept. 390	180300 - BELL MOUNTAIN - WO20394423
View Permit	0802/370415/443294/...	Permit Approved - Waiting for Constructio...	Communication - Utility Permit	AT&T-DFW/RURAL MARKET WIRELINE	Jackie Pell	A02RQZW-RAHAT ULLAH, RAHAT
View Application Summary	0802/370408/443279/...	Permit Approved - Waiting for Constructio...	Electric - Utility Permit	Oncor Electric Delivery, LLC Distribution	Oncor Electric Delivery, LLC Distrib...	ID 5483 WO 21757193
ACTION	00002/20240801/370269/442889/...	Permit Approved - Waiting for Constructio...	Communication - Utility Permit	Lumen Technologies	Lumen Technologies	Colleyville, TX, William D Tate Aerial to Underground LUM
ACTION	00002/20240801/370261/442840/...	Permit Approved - Waiting for Constructio...	Electric - Utility Permit	Oncor Electric Delivery, LLC Distribution	Oncor Electric Delivery, LLC Distrib...	ID 5218 WO 24295548
ACTION	00002/20240801/370253/442810/...	Permit Approved - Waiting for Constructio...	Communication - Utility Permit	Spectrum - CTX	Traci Rodriguez	5482001 OH TR
ACTION	00002/20240801/370245/442786/...	Permit Approved - Waiting for Constructio...	Electric - Utility Permit	Oncor Electric Delivery, LLC Distribution	Oncor Electric Delivery, LLC Distrib...	ID 5486 WO 22842539

Another option is to export information about the utility permit applications to an Excel file. The data fields that you selected in the **Columns For Export** section of your query will all be included on the Excel file that you export.

1. After executing the search, select **Export to Excel**.
2. A pop-up will display in the upper right corner of the page letting you know that the Excel export has started.

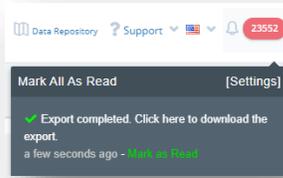


3. View the status of the report from your Notifications dropdown.





4. After the export has completed, select the Export completed notification to download the report.



5. Save the file to the desired location on your computer and open the Excel file to view and edit the utility permit data.