CROWM External User Manual (Version 7.4)

City of Calgary, Rights-of-Way Management Service Section

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Introduction

Terminology

The technical terminology used in this manual are defined in the *Municipal Rights-of-Way Bylaw* Number 17M2016, or the *Rights-of-Way Management Services Section – Glossary*. Defined technical terms, or terms specific to the Application process or states in CROWM appear in black on first usage. Other terminology, meaning, usage and spelling follow *The Canadian Oxford Dictionary*.

Authority and Purpose

The Rights-of-Way Management Service (ROWMS) is a Section of the Rights-of-Way (ROW) Services sub-Division responsible for all aspects of the Utility Line Assignment (ULA) process, including Inspections, as set out in the *Municipal Rights-of-Way Bylaw* Number 17M2016, and applicable Municipal Consent and Access Agreements (MCAAs). There are many demands for the use of The City's ROWs, a limited resource. With numerous interests competing for both short and long-term use of these ROWs, it is crucially important that a balance exist where their intended use, present and future, is protected. In achieving this balance, The City strives to provide ROWs that safeguard the public, and help fulfill The City's mission, values, and objectives. The City ROWMS Section holds the responsibility for managing the use of the ROWs, ensuring equitable treatment for Utility Providers, while simultaneously ensuring strict compliance with, and enforcement of all City bylaws and guidelines.

The City has developed comprehensive guidelines to outline the requirements for shallow Utility Providers (i.e., ENMAX, ATCO, Telus, Rogers, Bell, etc.) to work in, on and above The City's ROWs, and to provide for the efficient review of Utility Alignment Permit (UAP) Applications. Utility Providers must obtain a UAP, to access City-owned or managed ROWs (including planned ROWs on in-development property/subdivisions) to install, maintain, and/or repair their equipment within the ROW. Work in an ROW may not proceed until a UAP is issued. The UAP *only* authorizes the Utility Provider *to access* an ROW to install, maintain, and/or repair equipment in the approved ULA. No transfer of ownership or right of access is explicit or implied. Utility Provider equipment remains the property and responsibility of the Utility Provider, and the ROW remains the property of The City.

NOTE: The Utility Line Assignment is the approved location for equipment to be installed in the ROW. The Utility Alignment Permit is the temporary authority granted to a Utility Provider (or their agent) to access the ROW for the purpose of installing, maintaining, or repairing approved equipment. No transfer of ownership or rights of any kind is expressly given or implied.

Any time a UAP is required, other permits such as excavation and street use/detours may also be required. It is the Utility Provider's responsibility, and a condition of the UAP, to ensure that anyone doing work on their behalf have all the required permits, valid, and in place at the time the work is done. Otherwise, the installed equipment will be deemed *Non-Compliant*.

Calgary Rights-of-Way Management (CROWM) is a suite of web applications that allow Utility Providers, and their Contractors to submit ULA/UAP Applications requesting permission to work within The City's ROWs. Utilities Planning Specialists from the ROWMS Section review the ULA/UAP Applications resulting in either a Rejection or Approval. Rejected Applications can be re-submitted to allow the Applicant to correct

any errors and re-submit their Application. Approved Applications are issued a UAP. The UAP is an authorization from The City for a **Company** to work within The City's ROWs subject to permit conditions.

Once construction begins, CROWM is used to update the state of the construction, capture requested **deviations** of the original construction plan, record and track inspections, and track the final outcome of the work once it is **complete**.

The CROWM system, and Utilities Planning Specialists' reviews bring together a broad section of many industry practices that Utility Providers already follow while working in City ROWs. The ROWMS Section helps The City satisfy its role as custodian of, and allows greater safety, accuracy, and environmental compliance when working within The City's ROWs.

STEP 1: Create a myID business administrator account

CROWM was built to serve the businesses that do work within City-owned and managed ROWs, and is the only tool used to apply for and track ULAs, and UAPs. CROWM uses The City's online identity management service, myID, as a service to enable and manage user access. All users must have a myID Business Account, you will need to register for one.

If you do not have a myID *Business* account, you will need to register for one. A *personal* myID account will not enable you to access CROWM.

NOTE: myID is not a CROWM function and is not administered by the ROWMS Section. Support for this, and other myID issues may be obtained from the [Planning Service Centre](#) or [311](#). Allow at least 24 hours after your Company's myID business account administrator has authorized your request for the related myID and CROWM databases to update so that you can sign-in properly. When you have a myID business account "Sign In" to your myID profile.

Instructions

1. **Create a myID business account**

To obtain a myID business account, please refer to www.calgary.ca/myid/business-accounts.html.

2. **Convert myID business account to a myID business administrator account**

To convert your MyID business account to a myID business administrator account, please refer to www.calgary.ca/myid/business-accounts.html.

You will need to provide a business license number or a business identification number (BID) to convert your myID business account to a myID business administrator account. For more information about applying for a business licence online, go to http://www.calgary.ca/for-business/getting-started.html. To obtain a myID business account without a Business Licence, you will need a BID. You can apply for a BID from the [Businesses not requiring a municipal licence](#) page by clicking on the Apply now link near the bottom of the page (Figure 1).

How to apply

Online

Apply now

If you need help when completing your application Chat with us, 8 a.m. to 4:15 p.m. Monday to Friday.

In person

Apply in person at the Planning Services Centre.

Figure 1: Apply for a myID Business Account

3. **Activate myID business administrator account**

Follow the instructions in your e-mail to activate the myID business administrator account. You will receive a confirmation e-mail with the subject line "Account Activation Notification."

Once your Business myID account is set up, you can log in to the CROWM portal.

If you are not the myID business account administrator for your Company, you will need your Company's myID business account administrator to authorize you before your myID business user account will function. They will receive an e-mail from myID requesting their authorization of your request. After you have successfully converted your myID account to a business account please allow at least 24 hours before attempting to log-in to CROWM for the first time.

STEP 2: Start to Use CROWM

Access Privileges

CROWM uses the BID associated with your myID business administrator's account to create a "Company" record in the database. Table 1 outlines the access privileges granted to 'Company', 'Utility Provider', and 'Contractor' users.

Type of User	Description	Access Privileges
Company	All Businesses that use CROWM are recognized as a "Company". When a myID business user logs-in to CROWM, the system checks the BID property of the myID user to determine if this is the first user from this Business to log-in to CROWM. If the BID is new, a new Company is added to the CROWM database. myID users that work for the same business will all share the same BID, and in turn will be associated with the same "Company" within CROWM.	If an external user works for the Company that submitted an application they can view and edit the Application.
Utility Provider	Certain businesses, such as ENMAX, TELUS, Rogers, Bell, and various arms of The City of Calgary (e.g., Mobility, Parks, Water) are the Companies responsible for the documentation of the equipment installed in Calgary ROWs, and the equipment itself. These companies are referred to as "Utility Providers," are authorized to perform additional tasks, and have access to more data than other Companies. Only an internal CROWM **Administrator** can elevate a Company to a Utility Provider. A Utility Provider can be authorized as a Contractor for another Utility Provider.	If a user works for the Primary Utility Provider that is assigned to an Application they can view and edit the Application. If a user works for an Additional Utility Provider that is assigned to ULA Application they can only view the Application.
Contractor	A Contractor in CROWM is a Company that has been authorized by a Utility Provider to submit a ULA/UAP Application to CROWM on behalf of that Utility Provider. The same Company can be authorized by more than one Utility Provider, so in most cases, when a Contractor submits an Application to CROWM, they must choose which Utility Provider will be responsible for the ULA/UAP Application. Utility Providers can "revoke" the Contractor relationship with any Company. Once revoked, that Company can no longer submit new Applications on behalf of the Utility Provider. All ULA Applications that have already been submitted are not affected.	If an external user works for the Contractor that submitted an Application they can view and edit the Application until it is Closed; even after the Utility Provider has revoked the Contractor relationship.

Table 1: Company Privilege Levels

Logging-in to CROWM for the First Time
Step 1: Access CROWM

To access CROWM, click the link to go to: https://crowm.calgary.ca/.

The first time you log-in to CROWM you will be presented with a limited set of options (Figure 2). As a -first-time user, you will only be able to select the *CROWM Tutorial*, check a drawing, or view the *Help* files.
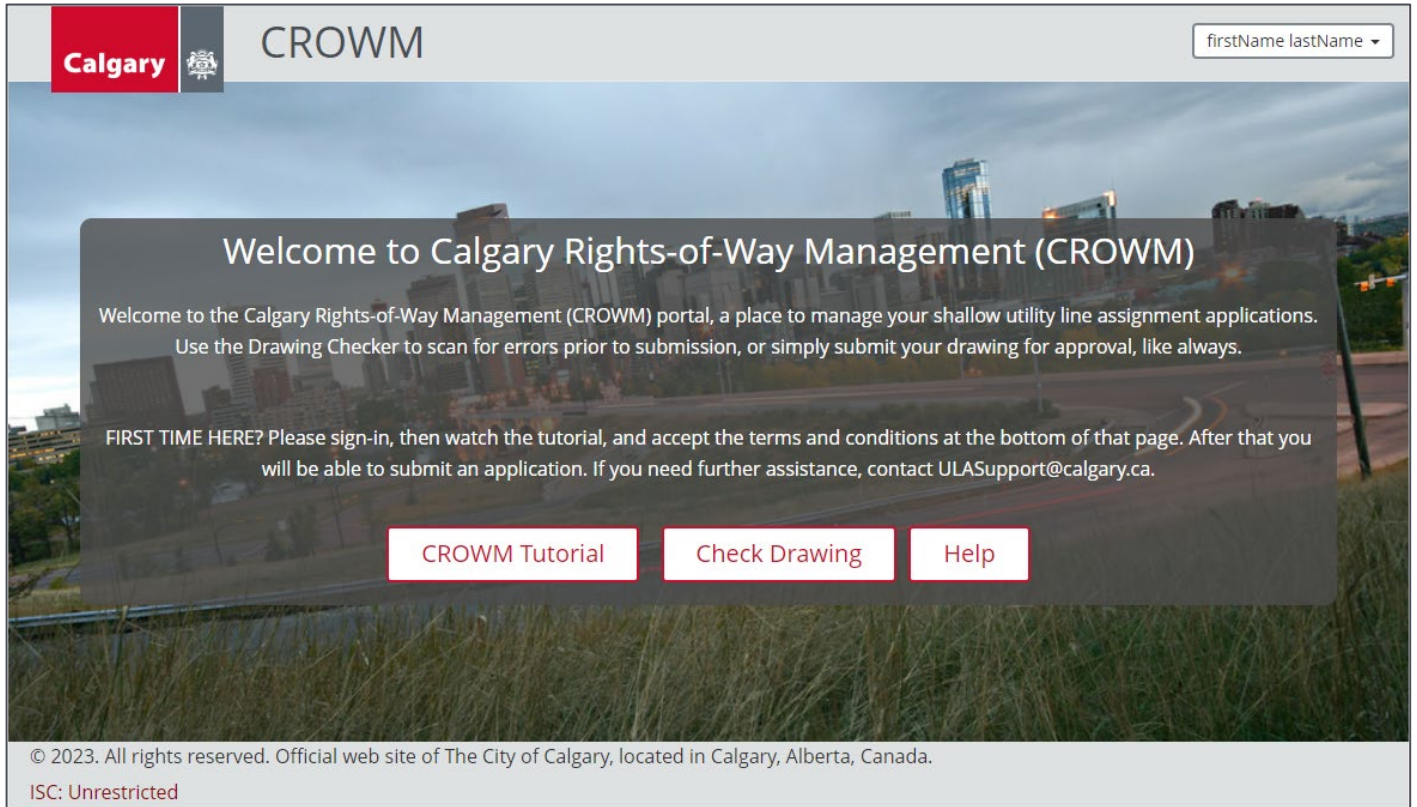

Figure 2: First-time Log-in Welcome screen.

Step 2: View Tutorial Videos and Accept Terms and Conditions

To access additional features of CROWM, select the *CROWM Tutorial* button, view the videos, read and accept the *Terms of Use*, and click on the *Let me into CROWM* button (Figure 3).
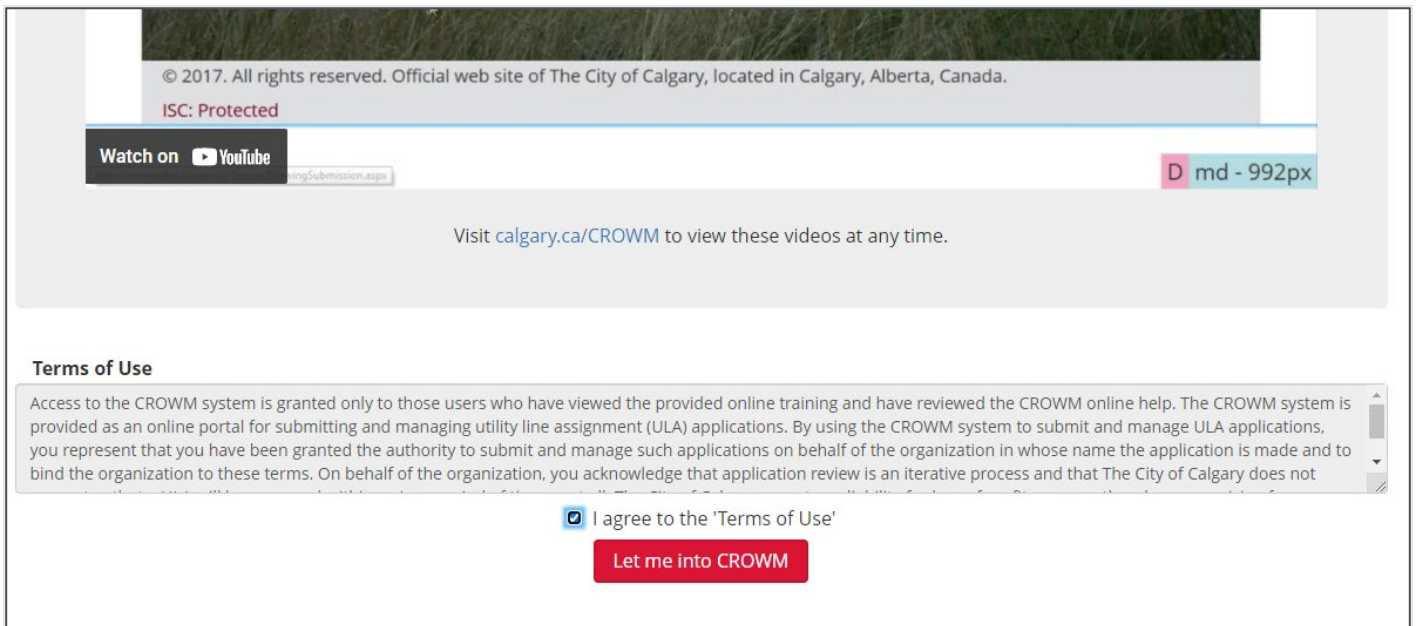
Figure 3: Agree to Terms of Use

After accepting the Terms of Use, the Welcome page should change, replacing the CROWM Tutorial button with a New Application, and My Applications buttons (Figure 4).
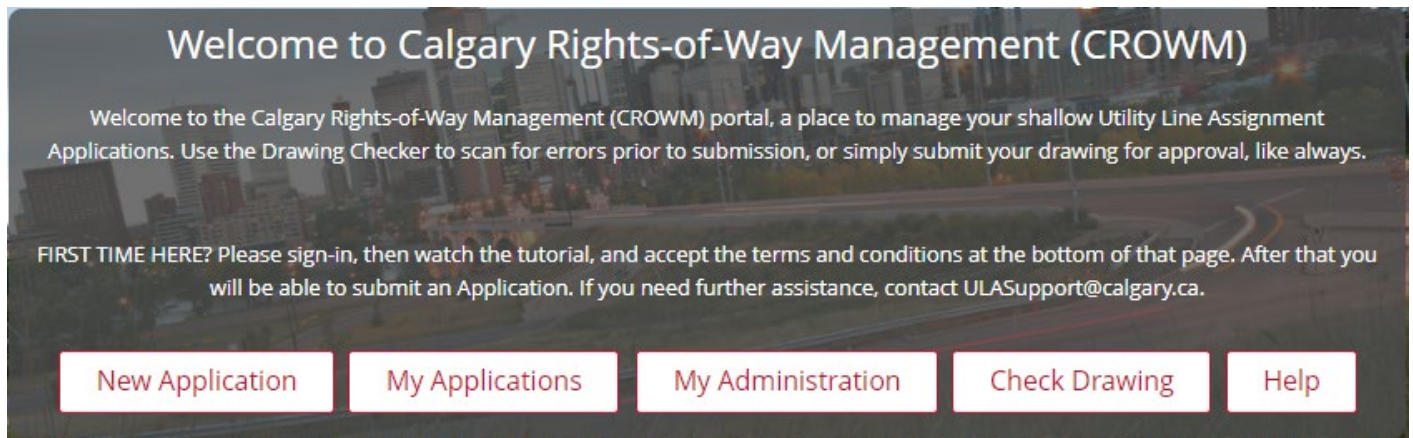
Figure 4: CROWM Welcome Page

A *My Administration* button will also appear for External Users with myID Administrator privileges.

Dropdown Menu

At the top right of all pages is a dropdown menu that displays the name of the logged-in user. There are four actions/commands accessible from this menu:

- Home – returns you to the first page you see when you log-in to CROWM - https://crowm.calgary.ca/;

- Tutorials – opens a new browser tab, and loads the webpage for the CROWM tutorial videos;

- Help – opens a new browser tab, and loads the CROWM Frequently Asked Questions (FAQ) page - https://www.calgary.ca/development/permits/rights-of-way-management-faq.html; and

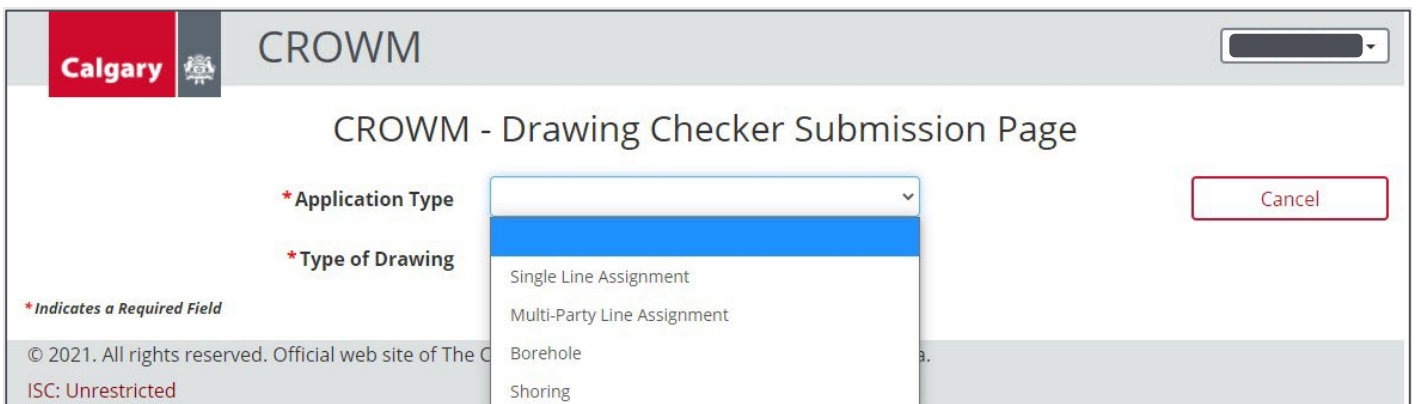- Logout – logs-out the currently signed-in user.

Check Drawing

Purpose

The Drawing Checker is a pre-Application service to enable Applicants to check if their design, or As-Built drawings meet the basic CROWM Digital Drawing Guidelines. The Drawing Checker *does not* check the content of a submitted drawing. The automated check only verifies that the expected layers are present in the drawing file, the layers have content, and the content is within the limits of The City of Calgary. Only 2D drawings are accepted. Drawings that are configured as 3D will fail the drawing checker. In rare cases, misconfigured files will cause the drawing checker to hang, or take a very long time to send you a response. When this occurs, repeatedly submitting the drawing will cause the server hosting the drawing checker to stop until a ROWMS Section team member clears the queue.

Application Type

The *Application Type* dropdown menu (Figure 5) is a required field, and the list of types visible or available to you will depend on your [Access Privileges](). Additionally, not all ULA types are available in the Drawing Checker because some types, and their associated design files do not conform to the standard. The types of ULA available in the Drawing Checker are:

- Single Line Assignment;

- Multi-Party Line Assignment

- Borehole;

- Shoring; and

- Wireless Infrastructure Deployment Line Assignment.

Figure 5: Application Type dropdown menu

Type of Drawing

The *Type of Drawing* dropdown menu (Figure 6) is a required field, and lists the two types of drawing that can be submitted to CROWM: Design; and As-Built.

Figure 6: Type of Drawing dropdown menu

Once a drawing type has been selected, several additional fields will appear (Figure 7).
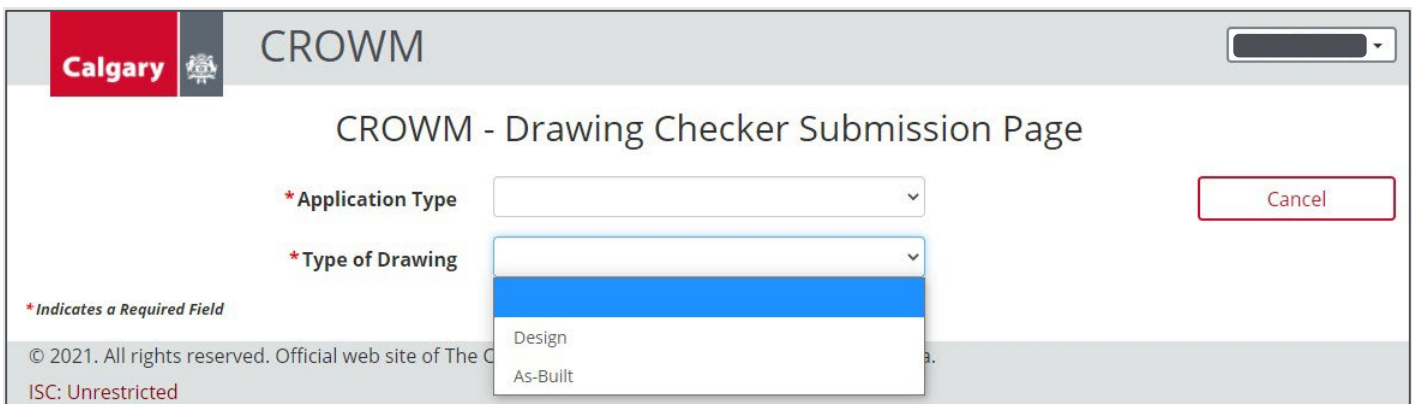
Figure 7: Drawing Checker Submission Page

The specific fields that appear will depend on the Application Type, and Type of Drawing selected:

- Single Line Assignment;
    - Design
        - Utility Provider
        - Your Project ID
        - Proposed Length of Line

- Number of Proposed Structures
- Proposed Work Location
- Alternate E-mail
- Select Drawing File
- Terms of Use
  - o As-Built
    - Utility Provider
    - Your Project ID
    - Work Location
    - Alternate E-mail
    - Select Drawing File
    - Terms of Use

- Multi-Party Line Assignment;
  - o Design
    - Utility Provider
    - Your Project ID
    - Proposed Length of Line
    - Number of Proposed Structures
    - Proposed Work Location
    - Alternate E-mail
    - Select Drawing File
    - Terms of Use
  - o As-Built
    - Utility Provider
    - Your Project ID
    - Work Location
    - Alternate E-mail
    - Select Drawing File
    - Terms of Use

- Wireless Infrastructure Deployment Line Assignment;
  - o Design
    - Utility Provider
    - Your Project ID
    - Proposed Length of Line
    - Number of Proposed Structures
    - Proposed Work Location
    - Alternate E-mail
    - Select Drawing File
    - Terms of Use
  - o As-Built
    - Utility Provider
    - Your Project ID
    - Work Location
    - Alternate E-mail
    - Select Drawing File
    - Terms of Use

- Borehole;
  - Design
    - Utility Provider
    - Your Project ID
    - Proposed Remediation Length
    - Proposed Number of Boreholes
    - Proposed Work Location
    - Alternate E-mail
    - Select Drawing File
    - Terms of Use
  - As-Built
    - Utility Provider
    - Your Project ID
    - Work Location
    - Alternate E-mail
    - Select Drawing File
    - Terms of Use

- Shoring

  - Design
    - Utility Provider
    - Your Project ID
    - Proposed Length of Backsloping plus Support Wall
    - Proposed Work Location
    - Alternate E-mail
    - Select Drawing File
    - Terms of Use
  - As-Built
    - Utility Provider
    - Your Project ID
    - Work Location
    - Alternate E-mail
    - Select Drawing File
    - Terms of Use

Utility Provider

The *Utility Provider* dropdown menu is a required field, and lists the Utility Providers on whose behalf you are authorized to submit Applications to CROWM. If you do not see a Utility Provider you expect, contact your client at that Utility Provider to have their Administrator add your Company to their authorized list of Contractors.

Your Project ID

The *Your Project ID* text field is optional, and is provided as a courtesy for External Users of CROWM to organize their Applications. This field is not used by CROWM, or the Utility Planning Specialists. When communicating with ROWMS Section team members, do not rely only on referring to Your Project ID. You

may have up to five (5) Project IDs. Add additional Project IDs by clicking on the '+' to activate an additional field. Remove a Project ID by clicking the '-' next to the Project ID field.

Proposed Length of …

The *Proposed Length of Line* optional field appears for Single Line Assignment, Multi-Party Line Assignment, and Wireless Infrastructure Deployment Line Assignment Application Types. For Boreholes and Shoring this optional field appears as Proposed Remediation Length, and Proposed Length of Back sloping plus Support Wall, respectively. This field does not appear when the As-Built Type of Drawing is selected. The *Proposed Length* is used by CROWM as part of its estimated Review Fee calculation. The amount of the actual fee is determined during the Utility Planning Specialists' review, based on actual line length of the alignment in the design drawing.

Proposed Number of Structures (or Boreholes)

The *Proposed Number of Structures* optional field appears for Single Line Assignment, Multi-Party Line Assignment, and Wireless Infrastructure Deployment Line Assignment Application Types. For Boreholes, this optional field captures the Proposed Number of Boreholes. This field does not appear when Shoring is selected as the Application Type. This field does not appear when the As-Built Type of Drawing is selected.

Proposed Work Location

The *Proposed Work Location* text field is provided for you to indicate more specifically where the work will take place; especially in cases where the address provides too vague a location, or only represents one arbitrary point on a long alignment. This field does not appear when the As-Built Type of Drawing is selected.

Alternate E-mail

The *Alternate E-mail* text field is where you add additional e-mail addresses for alternate contacts with interest in the ULA Application, and will receive the same notifications as the Applicant. This is a courtesy service to enable External Users to address ULA Applications when the original Applicant is not able to.

Select Drawing File

The *Select Drawing File* feature provides a dialogue for you to browse for, select and upload the drawing to be checked.

Terms of Use

You must read the *Terms of Use*, and check the check box before the Drawing Checker will run. It is important for you to read and understand the Terms of Use as they will change from time to time.

New Application

Purpose

To start a new ULA Application, go to: https://crowm.calgary.ca

    1) Using your myID business account sign-in to CROWM. If this is the first time you have signed into

2) CROWM, please <u>refer to the *Logging-in to CROWM for the First Time*</u> section of this document.
3) Select "New Application"

The *New Application* page (Figure 8) provides the entry point to begin an Application for a ULA of several types:

- Single Line Assignment;

- Multi-Party Line Assignment;

- Annual Permit;

- Infill Service Connection;

- Borehole;

- Shoring;

- Tree Replacement – Urban Forestry;

- Temporary Service Drop; and

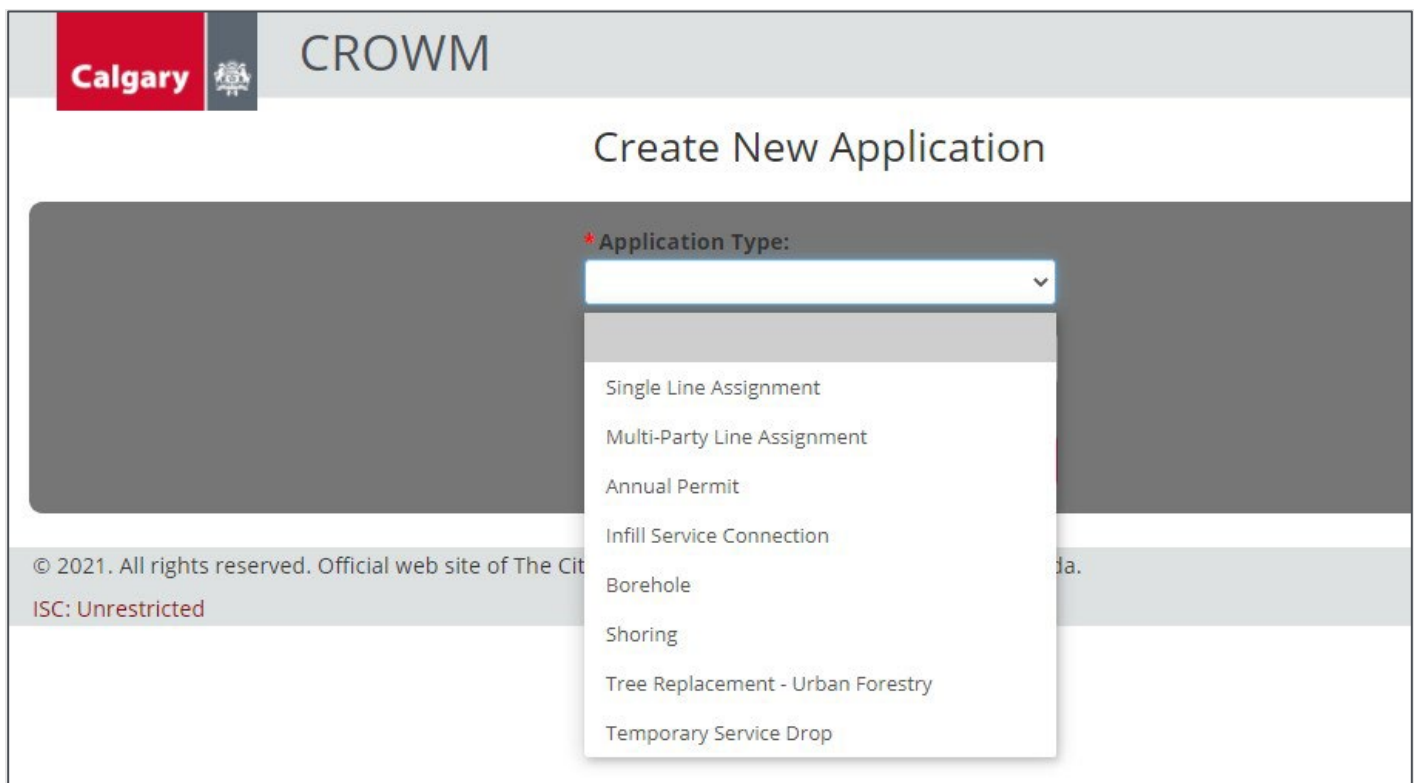- Wireless Infrastructure Deployment Line Assignment.

Figure 8: Create New Application page.

If the above ULA Types are not authorized for the Utility Provider by an internal CROWM Administrator, the external CROWM Level 5 Business Administrator for the Utility Provider will not be able to see the capabilities of those ULA Application types. Descriptions of each Application Type are provided below. The

New Application page also provides two navigation buttons that will direct you to the *My Applications* page, and back to the CROWM Welcome/Home page.

Application Type

From the New Application page, choose the *Application Type*, and select the *Create Application* button. You will then be directed to *Step 1: Details* (Figure 9) to begin entering the information required to obtain a UAP for your proposed work. To determine which Application Type you require, refer to the descriptions below. Should you still require assistance identifying which Application Type you should apply for, contact your Utility Provider client. If your client is unable to assist, contact ULASupport@calgary.ca to have a member of the ROWMS Team assist you in selecting the appropriate Application Type.

Figure 9: Create New ULA Application Step 1: Details

Single Line Assignment

The Single Line Assignment Application Type is used for work intended to place infrastructure, belonging to a single Utility Provider, where the proposed work will involve ground disturbance within a City Road ROW or Utility Right-of-Way (URW).

Multi-Party Line Assignment

The Multi-Party Line Assignment Application Type is used for work being undertaken to place infrastructure, belonging to multiple Utility Providers, but applied for under a single Application, where the proposed work will involve ground disturbance that will occur within a City Road ROW or URW. The resulting alignment is termed a Multi-Party Installation, and is Defined in Bylaw 17M2016 as:

> "…the coincident installation of equipment in a single utility alignment, which may include equipment for providing electricity, natural gas, or telecommunications services"

Annual Permit

The Annual Permit Application Type is used for work being undertaken to remove equipment belonging to a single Utility Provider; typically service connections to a private lot that are no longer necessary. Equipment removal is regarded as a safety measure. This Application Type does not require a design drawing, as it is unlikely that the Utility Provider can determine in advance what service connections will be removed during the UAP authorization period. An As-Built drawing may typically not be required by the reviewing Utility Planning Specialist if the Utility Provider is a Joint Utilities Mapping Project (JUMP) member in good standing.

Borehole

The Borehole Application Type is used for work undertaken for an underground investigation where the ground disturbance will occur within a City Road ROW or URW. The Borehole Application Type should also be used for geotechnical investigations, the installation or removal of a monitoring well, or other environmental remediation work, regardless of whether or not the remediation work results in the installation of remediation equipment or remediation structures.

NOTE: Climate and Environment, and Community Planning Design and Construction will be automatically notified of your Borehole Application. A representative of each of those business units will determine whether or not your work will require either Licence of Occupation, or Indemnification Agreement, and make a note of it on your CROWM Borehole Application for the reviewing Utilities Planning Specialist.

Infill Service Connection

The Infill Service Connection Application Type is used for work being undertaken to place a short extension of conduit, wire, and/or pipe from a main line directly to a Private Lot to facilitate new construction of an Infill structure where the infill service line **does not** cross another shallow utility line or impact other City assets. A Utility Planning Specialist may require a Single Line Assignment application to be submitted if it is determined there are recently approved shallow utilities or City assets that may be impacted. The proposed work will involve ground disturbance that will occur within a City Road ROW or URW, but due to the need for quick response, and the sheer number of Applications that will be made under this Application Type no .dgn file is required to support the Application. However, since there is no design file, Applicants should expect an extra level of scrutiny during the As-Built review.

Shoring

The Shoring Application Type is used for work being undertaken to place infrastructure or back sloping in City Road ROW or URW for the sole purpose of keeping shoring walls at a construction site upright or stable for the protection of the work, and to prevent collapse. This includes tie-backs that extend into a City Road ROW or URW, even if the shoring itself does not.

Temporary Service Drop

The Temporary Service Drop Application Type is used to notify The City of a Service Drop, defined as an above ground connection to give service to new customers, to restore service in case of equipment failure or for other Utility Provider purposes. Notification through CROWM must be done after the placement is complete. As a notification, *not an Application*, a design file is not required. Temporary Service Drops must be removed from the ROW, or converted to a Single Line Assignment or Infill Service Connection within one year of the date of placement.

Tree Replacement – Urban Forestry

The Tree Replacement – Urban Forestry Application Type is used for tree replanting work in City Road ROWs. Trees may not be planted in URWs. This Application Type is only available to City of Calgary Urban Forestry Users.

Wireless Infrastructure Deployment Line Assignment

The Wireless Infrastructure Deployment (WID) Line Assignment Application Type is a special type of Multi--Party Line assignment **only** used for work being undertaken to place WID-related equipment, where the proposed work will involve ground disturbance that will occur within a City Road ROW or URW exclusively for the purpose of WID equipment on City-owned infrastructure.

Submitting an Application that should otherwise have been a Single Line Assignment, or Multi-Party Line Assignment will result in your Application being Rejected – At Fault, forfeiting the non-refundable Application Fee.

Step 1: Details

The Details section (Figure 9) captures the summary information of the Application. Complete the form by filling in each field. Some fields are required, and must contain information before you will be allowed to proceed to Step 2, and some fields are optional:

- Application Type – a required field for the type appropriate for your work or installation. Refer to the descriptions above to determine which Application Type you require;

- Multi-Party Type – a required field that only appears for Multi-Party line assignment Applications. The Multi-Party sub-Types are:

    a. URD – Underground Residential Distribution (URD) refers to a Multi-Party Application Type in a 'green field' or 'new' development area. The term URD refers to a development process, which is led by ENMAX and is sometimes referred to as a 'Joint Use Trench URD', 'Four Party Trench' or "Multi-Party Trench" – representing ATCO, ENMAX, Rogers, TELUS, and on occasion Street Lighting, and City of Calgary ITS Fibre's presence in the trench. Not all parties may choose to participate (e.g., TELUS in 2015); which may cause that Utility Provider to incur additional costs obtaining their own ULA, or having to use an unfavourable alignment in a crowded ROW. If portions of the alignment show a single utility only, that portion would need to be removed from the drawing, and submitted separately, by that utility as a single line assignment.
    b. Developer Choice – is a small development of brown field infills or smaller builds where ENMAX is contracting out the work;
    c. Design Only - $1,000 service where the ULA Team provides substantial input into the project design/route; and

d. Joint Use – is used for work in a 'brown field' or 'established' area when more than one Utility Provider will install equipment in the same trench, servicing the same area, but not necessarily all utilities. If portions of the alignment show a single utility only, that portion would need to be removed from the drawing, and submitted separately, by that utility as a single line assignment.

- Primary Utility Provider – a required field indicating who you are submitting the Application for, or who owns the equipment to be installed;

- Additional Utility Providers – a required field that only appears for Multi-Party line assignment Applications. The number of Additional Utility Providers that can be added will be limited by the number of Utility Providers that have authorized your Company to submit Applications on their behalf. You can have up to five unique Additional Utility Providers. If you are missing any Utility Providers you need for your Application, contact your Client to have the other Utility Provider administrators authorize your Company in CROWM.

- Project IDs (up to 5) – a required field provided for your project identifiers, as requested by many external users. Use this field to indicate any unique project codes or numbers that may help you manage your submissions. Utilities Planning Specialists do not use Project IDs in their review process. Up to 5 separate identifiers may be added using the "+" symbol next to the field;

- Applicant Name – this required field is auto-filled based on the user logged-in, and cannot be edited;

- Project Manager – an optional field identifying the names of additional contacts who may be responsible for the application, or the work applied for. Up to 5 additional names may be added using the "+" symbol next to the field. **Do not** enter e-mail addresses into this field;

- E-mail – this required field is auto-filled based on the user logged-in, and cannot be edited;

- Alternate E-mails(s) (up to 5) – an optional field for the e-mail addresses of the additional contacts who will receive e-mail notifications generated by CROWM. Up to 5 separate e-mail addresses may be added using the "+" symbol next to the field;

- Telephone – a required field for the telephone number of the user preparing the Application;

- Proposed Length of Line (metres) – this required field should match the total length of the alignment applied for, and is shown in the design file, submitted in Step 3. This number is also used in the fee calculation, as confirmed during the Utilities Planning Specialist's review.
  a. For Multi-Party Applications set this to the longest net length of line work (NOT total length from all parties). For example, if Utility Provider A needs to run 100 m of cable in the joint use trench, but Utility Provider B only needs to run 75 m of conduit **in the same trench**, set this number to 100 m. Additional, separate trenches, to reach existing pull boxes, or vaults *et cetera*, are also added to the total. This field does not appear for the Annual Permit Application Type;
  b. For Borehole Applications set this to the total distance from the first borehole to the last borehole in the series, if the distance between any two boreholes is less than 175 m. If any two boreholes are separated by more than 175 m, separate Applications are required.
  c. For Shoring Applications set this value to the total length of the backsloped, and/or anchored shoring wall adjacent to The City of Calgary ROW, as well as any portion of the un-anchored wall which may encroach into The City Road ROW. Do not include in the total any portion of the wall that shares a common Lot Line with an adjacent Private Property.

- Number of Proposed Structures – this required field should match the total number of structures appearing in the design file, submitted in Step 3. If there are no structures being installed as part

of the work applied for, enter a zero, "0". This field does not appear for the Annual Permit Application Type;

- Approx. Construction Start Date – this required field is your best estimate of the most likely date of the start of the work applied for. If this date is more than 180 days from the Application submission date, you Application may be rejected because UAPs are only valid for 180 days; and

- Approx. Construction End Date – this required field is your best estimate of the most likely date of completion of the work applied for.

Upon completing all the required fields, click on the Next button at the upper right to move on to Step 2.

Step 2: Location

The Location section (Figure 10) captures where the work applied for will take place, the Scope of Work, and the types of equipment to be installed:

Figure 10: Create New ULA Application Step 2: Location

- Address – this required field captures a representative address for the work applied for. For example, the address supplied is the middle of a proposed alignment. The Address can be entered into the text field above the map, and then click on the magnifying glass button to confirm the location on map. Upon clicking on the magnifying glass, the map will zoom to the best fit address, and provide a dialogue window with at least one search result. If there is only one result for the

address entered, the Section/Township/Range, and City Quadrant fields will be automatically filled in. Otherwise, click on one of the search results and click on the arrow button next to the magnifying glass at the bottom of the dialogue. The Section/Township/Range, and City Quadrant fields will be automatically filled in.

- o Examples of acceptable addresses are:

    - ▪ 36 St NE and 32 Av NE; and

    - ▪ 3550 32 Av NE.

- o An address more than 175 m from the closest cross street is not acceptable.

NOTE: The Address is not required for Tree Replacement – Urban Forestry Applications. However, you may enter an address as a general location search or select a location on the map to have CROWM automatically fill in your Section/Township/Range, and City Quadrant;

- ▪ Section/Township/Range – the required field for at least one Section of work location using the Alberta Township Survey System (ATS). The first Section/Township/Range will likely be filled in after clicking on a map location to enter the Address. For projects that cross Section boundaries, or are very long, additional Sections can be added by clicking on the "+" button.

NOTE: Tree Replacement – Urban Forestry applications are limited to one Section.

- ▪ City Quadrant – this required field simply captures which of the four quadrants of the city the work applied for will take place, and may be automatically filled in when you select a location on the map;

- ▪ Scope of Work – a required field to capture a brief description of the proposed work to be completed; and

NOTE: Tree Replacement – Urban Forestry Applications, this field is the required Short Project Description.

- ▪ Installation Types – a required field capturing the type(s) of equipment to be installed, or to indicate that the work to be done involves the abandonment or removal of existing equipment. In this case, provide additional information on the abandonment or removal in the Scope of Work.

Upon completing all the required fields, click on the Next button at the upper right to move on to Step 3.

Step 3: Files

In Step 3 (Figure 11) you will be required to upload a MicroStation design file (.dgn). There is also an optional feature for you to upload supporting documents. Only one design file is required, and accepted by CROWM. Supporting documents are subject to the limitations noted on the *Attach Supporting Documents* section.

NOTE: Do not attach the Drawing Checker Report you may have received by using the Drawing Checker prior to completing your Application. Another one will be generated, and attached to your Application record when you upload your design file.

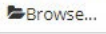Figure 11: Create New ULA Application Step 3: Files

Some Application types, such as Boreholes, may allow you to upload design files as PDF. In this case, a PDF of the block profile with the proposed boreholes indicated on it will be required.

Supporting documents are any documents that you feel are relevant to the work being carried out. You may attach as many documents as you like, up to the noted total limit. For borehole and shoring Applications include:

- The block profile with proposed boreholes;
    - all borehole locations as indicated on the block profile must include two sets of dimensions from the proposed boreholes to the adjacent property lines, and/or lot lines;

- An Authorization Letter is required from the Company you are doing work for. Max size for this file is 10 MB. If applying as an employee on behalf of land owner acting as the Contractor on their own property, a letter from someone with signing authority at the Company explaining the case will be sufficient. Otherwise, a letter from the land owner authorizing the Applicant to do the work, and take out permits on their behalf is required; and

- A detailed cross section of the borehole(s) indicating depth, diameter, and capping method for paved or grass area.

Step 4: Review and Submit

The last step before submitting your application is to review all the information provided in the previous steps (Figure 12).

An Estimated Total Cost for the Application review is calculated based on the information entered by the Applicant. This fee may be modified, or overridden by the reviewing Utilities Planning Specialist. Before the Submit button becomes active to enable you to submit your Application, you must read and agree to the Terms and Conditions, and agree to the non-refundable fee to be charged per submitted Application.

Figure 12: Create New ULA Application Step 4: Review & Submit

Upon clicking the Submit button you will be presented with a "Success" page indicating "Your changes have been successfully updated in CROWM", and three buttons: *Create Another Application*; *View My Applications*; and *Home*. You, and any additional e-mail addresses you provided in Step 1, will receive a

system-generated e-mail message confirming your Application submission, a summary of your Application, and a copy of the Drawing Checker Report generated by uploading your design file.

You will have until a Utilities Planning Specialist picks up your Application to Withdraw it without incurring the non-refundable fee. Once an Application is picked up for review by a Utilities Planning Specialist, the fee will apply. You may still Withdraw your Application without incurring the full review fee, but will still incur the non-refundable fee.

My Applications

Purpose

The My Applications page provides the main window into to your ULA Applications submitted to CROWM. This is where you can be sure to find the most up to date information and status of your Applications. All users of a Utility Provider will be able to see all the Applications of that Utility Provider. Contractor users will be able to see all Applications submitted by that Contractor (i.e., Company), regardless of Utility Provider.

NOTE: The system generated e-mails are a *courtesy* only. Applicants are responsible for knowing their Application's status by logging-in to CROWM to access their UAPs, and redline files.

The My Applications page has a dropdown menu at the upper right with links to get you back to the Home page, Tutorials, Help, and Logout. Other buttons on the page are:

- Home – takes you back to the Home page;

- Create New – takes you to the Create New Application page;

- View Closed Apps – takes you to the My Closed Applications search page;

- View Temporary Service Drops – takes you to the Temporary Service Drop Search page, but is only visible if the Company/Utility Provider associated with the logged-in user has ever submitted a Temporary Service Drop; and

- Refresh Page – refreshes the data displayed.

Two grids, My Pending Applications, and My Applications in Progress, will appear for all users even if there are no data to display. The My Temporary Service Drops grid will only appear to Users authorized to submit Temporary Service Drops, and have had at least one Temporary Service Drop active. The My Frozen Applications grid will only appear when at least one of your active Applications has been Frozen.

My Pending Applications

The My Pending Applications grid (Figure 13) displays all your Applications in the Pending state. Pending Applications have not yet been picked up by a Utilities Planning Specialist or other member of the ROWMS Section team, and are available for some kinds of edits or actions by you. Pending Applications can be:

- Moved up and down your queue (if you are a Utility Provider myID Business Administrator) to set the priority of your Applications for review;

- Withdrawn without incurring the non-refundable review fee;

My Pending Applications

Figure 13: My Pending Applications Grid

- ▪ Put on Hold;

- ▪ Modify Alternate E-mails; and

- ▪ Modified, as if it was a new Application except changes to the Application Type, and Utility Provider.

The grid can be sorted by clicking the title of any of the columns. Clicking once will sort the grid in ascending order of the values in the selected column. Clicking the column title again will sort the grid in descending order of the values in the selected column. Clicking the column title a third time will remove the sort based on that column.

The contents in the grid can be filtered using the inline filtering field at the top of each column. Multiple column filters can be combined to reduce the number of rows displayed in the grid. Remove a column filter by selecting NoFilter from the dropdown menu next to the filter term field.

To edit a Pending Application, either double click on an Application row, or highlighting an Application row and clicking on the Edit button. At the bottom of the Application Details page, select Modify (Figure 14).

Figure 14: Edit/Modify a Pending Application

If your recently submitted *Applications* are still in the *Pending* state, you can *Withdraw* them without input from the ROWMS Team, or incurring any fees by selecting the *Withdraw Application* button at the bottom of the *Application* details page in CROWM (*Figure 15*).

Figure 15: Withdraw a Pending Application

My Applications In Progress

The My Applications In Progress grid displays all your Applications in the In Progress state. Once a Utilities Planning Specialist picks up your *Pending Application*, it moves from the *Pending* state to the *In Progress* state. There are several sub-States while an Application is In Progress:

- Under Review – the Application is being reviewed by a Utilities Planning Specialist, but has not yet been Approved, and a UAP has not been issued;

- Request Information – while still Under Review the Utilities Planning Specialist may require information to be clarified, a design file to be amended, and/or some additional Supporting Documentation. To request this, they will create a Required Action for your Application, CROWM will automatically send a Notification to the Applicant and any Additional E-mail addresses;

- Approved – a Utilities Planning Specialist has reviewed the submitted Application information and design file, and has issued a UAP with Conditions. Once an Application has been Approved, you will be able to submit the Construction Complete date, and upload the required Excavation Permit list. You have 15 days from the completion of construction to submit the Construction Complete date, and Excavation permit list;

- Post Approval External Request – when an external user submits a Deviation Request, Extension Request, or As-Built drawing, the Application is moved to this state, and many actions are restricted until the request is resolved, either by an Approval or Rejection;

- Deviation Approved – after a Utilities Planning Specialist has reviewed, and accepted a Deviation Request. CROWM will automatically send a Notification to the Applicant and any Additional E-mail addresses with a new, replacement UAP attached.

- Deviation Rejected – a Utilities Planning Specialist may reject a Deviation Request for several reasons, including the need for additional information. Be sure to check the Client Correspondence section of your Application record to amend and resubmit your Deviation Request, as needed. If your Deviation Request was Rejected, your previously approved UAP is still considered valid.

NOTE: That portion of the approved alignment subject to the Deviation Request *replaces* the previously approved alignment. It is not *optional* to choose between the originally approved alignment and the approved Deviation Request alignment. Should the Deviation alignment not be required, a new Deviation Request *must* be reviewed and approved before using the original approved alignment;

- Post Approval Review – when a Deviation Request or Extension Request is submitted by an external user, and is being reviewed by a Utilities Planning Specialist;

- Approved Applications Expired – if the Construction Complete date, and Excavation Permit list are not uploaded before the Expiry Date, the Application will automatically expire, and CROWM will send a system-generated Notification to the Applicant and any Additional E-mail addresses.

NOTE: CROWM will automatically send the Applicant and any Additional E-mail addresses a warning Notification that your Application is about to expire one week before the Expiry Date. This is your opportunity to submit any required information, or request an Extension. Otherwise, after your Application has expired, it will be deemed Non-Compliant without further notice; and

- As-Built Submission Expired – if the As-Built drawing is not uploaded within 90 days of the Construction Complete date, the Application will automatically expire, and CROWM will send a system-generated Notification to the Applicant and any Additional E-mail addresses.

NOTE: CROWM will automatically send the Applicant and any Additional E-mail addresses a warning Notification that your Application is about to expire one week before the As-Built submission deadline. This is your opportunity to submit the As-Built before your Application automatically expires. Otherwise, after your Application has expired, it will be deemed Non-Compliant without further notice.

The My Applications In Progress grid can be sorted by clicking the title of any of the columns. Clicking once will sort the grid in ascending order of the values in the selected column. Clicking the column title again will sort the grid in descending order of the values in the selected column. Clicking the column title a third time will remove the sort based on that column.

The contents in the grid can be filtered using the inline filtering field at the top of each column (Figure 16). Multiple column filters can be combined to reduce the number of rows displayed in the grid. Remove a column filter by selecting NoFilter from the dropdown menu next to the filter term field.

My Applications In Progress
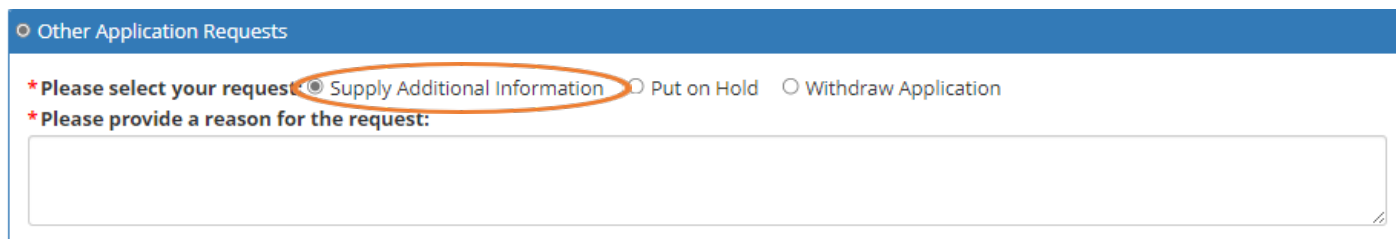
Figure 16: Grid Filter Fields

To edit an Application In Progress, either double click on an Application row, or highlighting an Application row and clicking on the Edit button. The Application details page will open. Some fields will be locked for editing. If the information you need to edit is in a locked field (e.g., the Utility Provider), you will have to Withdraw or Cancel your Application and submit a new one with the correct information.

Once an *Application* moves from the state of *Pending* to *In Progress* you cannot change most fields, including the *Project Manager*. However, you *can* change the *Alternate e-Mail Addresses*. If you do not

have myID Administrator privileges to make these changes, you will have to contact one of your Company's Administrators to make these changes for you.

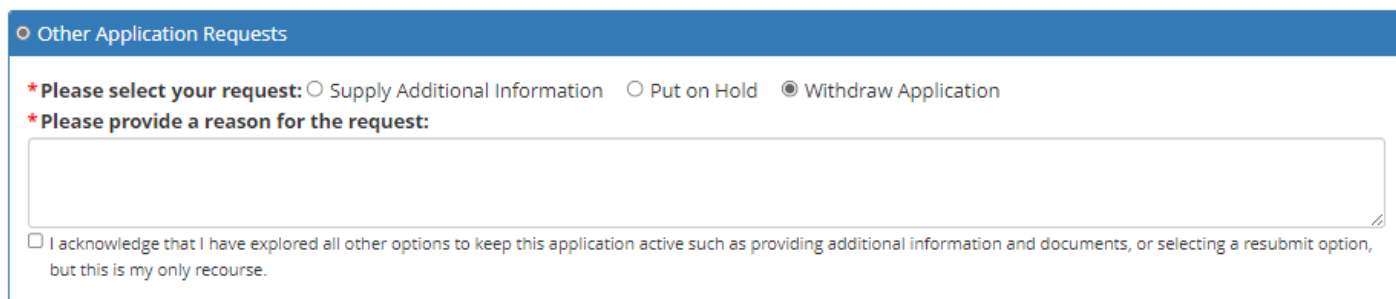While your Application is Under Review, you should be able to request to provide additional supporting documentation from the bottom of the Application Details page (Figure 17). When you click on the *Supply Additional Information* radio button, the *Please provide a reason for the request* text input field will appear.

Figure 17: Application Under Review Request to Supply Additional Information

While the Application is in the state of In Progress – Under Review, or In Progress – Request Information, you can request to Withdraw your Application from the Other Application Requests section at the bottom of the Application Details Page (Figure 18). When you click on the *Withdraw Application* radio button, a *Please provide a reason for the request* text input field will appear.

Figure 18: Withdraw Application

When an Application is in the state of In Progress – Approved, your only option to change the design file is to submit a Line Deviation request, and be clear in the notes why you are providing an amended drawing (Figure 19). When you click on the *Line Deviation* radio button, an *Attach Design File*, *Attach Supporting Documents*, and a *Please provide comments for the Line Deviation file to be uploaded* fields will appear. The design file, and a well-supported reason for the deviation are required for the Utilities Planning Specialist to review your request.

Figure 19: Post Approval Requests

At any time, you will find the submitted drawings for your Application in the *Design Files and Reports* section. After your Application has been approved, you will also find a copy of your UAP (i.e., Approved Report) here (Figure 20).

Figure 20: Application Details Page, Design Files and Reports

To Cancel/Withdraw your Application after a Utilities Planning Specialist has picked it up for review, you will have to select the Withdraw Application option, and provide a reason for the withdrawal request at the bottom of the Application details page in CROWM (Figure 21). Withdrawal requests may be denied and require additional supporting documentation, or evidence. Expect an Inspector to visit the work site to confirm that no work has been done without an approved permit.

Figure 21: Other Application Requests, Withdraw Application

You can request an extension for an Approved Application from the Post Approval Requests section at the bottom of the details page (Figure 22).

Figure 22: Approved Application Expiry Extension Request

You can request to Cancel your Approved UAP from the Other Application Requests section at the bottom of the Application Details page (Figure 23).

Figure 23: Approved Application Request to Cancel

My Temporary Service Drops (grid)

If the Utility Provider associated with the logged-in user has any active Temporary Service Drops, a *My Temporary Service Drops* grid listing them will appear below the My Applications In Progress grid (Figure 24). This grid will not appear when there are no active Temporary Service Drops as a feature to preserve the performance of the web application. To view the details of a Temporary Service Drop, either double click on a record row, or highlight a record row and click on the Edit button.

My Temporary Service Drops

Figure 24: My Temporary Service Drops Grid

When viewing an active Temporary Service Drop record, you will see a "What would you like to do?" dark panel area with two action options, and two navigation buttons (Figure 25). The My Applications button will take you to the My Applications page, and the Home button will take you back to the Home page.
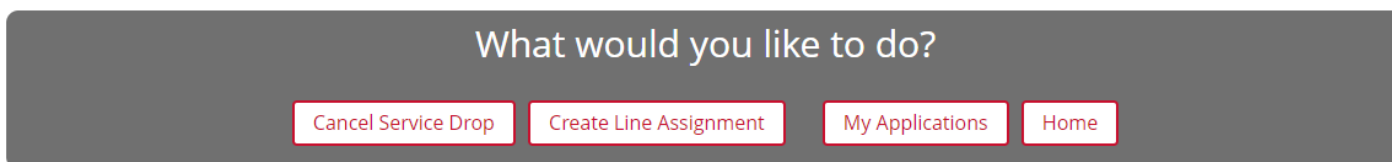
Figure 25: Temporary Service Drop Application Actions

To Cancel a Temporary Service Drop, click on the Cancel Service Drop button, enter the "Reason for Cancellation" in the textbox that appears below, then click on the Submit button. If there are no input errors, a Success page will be displayed with navigation buttons to the Create Another Application, View My Applications, and Home pages.

When a Temporary Service Drop will be replaced with a permanent service connection, you can save yourself some effort by converting the Temporary Service Drop to a Single Line Assignment. To do this, navigate to the Temporary Service Drop record of interest, scroll to the bottom of the details page, and click on the Create Line Assignment button. You will be taken to a Create New ULA Application page with much of the information already filled in:

- Application Type - prefilled with Single Line Assignment;

- Primary Utility Provider - prefilled with the Utility Provider from the Temporary Service Drop record; and

- Proposed Length of Line (metres) - this is prefilled by the line length from the Temporary Service Drop record, but can be modified.

On Step 2, the location information of the Temporary Service Drop being converted will be already filled in:

- Address - prefilled and locked, map location cannot be changed;

- Section/Township/Range – the first set is prefilled, and locked, but able to add additional Section/Township/Range as necessary; and

- City Quadrant - pre-selected, and locked to the address.

Fill in the Scope of work, which is a required field. Fill in the Installation Types, which is another required field. Proceed as normal to complete a new Single Line Assignment Application. On Step 3, provide the necessary design drawing file (required field). On Step 4, review the Application information, then click the checkbox to agree to Terms and Conditions. Then, click Submit button.

Once converted, the Temporary Service Drop record details page will no longer show the Cancel Service Drop, and Create Line Assignment buttons. A section indicating the record conversion information will now be visible, with a link to the Single Line Assignment Application created.

My Frozen Applications

An Application may be Frozen by a Utilities Planning Specialist, CROWM Administrator, or Inspector because of some problem with the Application, or work being done under the associated UAP, or an Inspector starts an Inspection of the permitted work. If there are any currently Frozen Applications, the My Frozen Applications grid will appear above all other grids on the page (Figure 26). This grid will not appear when there are no currently Frozen Applications as a feature to preserve the performance of the web application.

My Frozen Applications

Total record count: 1

App Number	App Type	Status	Sub-Status	Freeze Condition	Freeze Reason	Project IDs
A0000056282	Wireless Infrastructure Deployment Line Assignment	In Progress	Under Review			Test

View

Figure 26: My Frozen Applications Grid

The grid can be sorted by clicking the title of any of the columns. Clicking once will sort the grid in ascending order of the values in the selected column. Clicking the column title again will sort the grid in descending order of the values in the selected column. Clicking the column title a third time will remove the sort based on that column.

The contents in the grid can be filtered using the inline filtering field at the top of each column. Multiple column filters can be combined to reduce the number of rows displayed in the grid. Remove a column filter by selecting NoFilter from the dropdown menu next to the filter term field.

To view the details of a Frozen Application, either double click on an Application row, or highlight an Application row and click on the View button.

My Closed Applications

Clicking on the View Closed Apps button (Figure 27) takes you to the My Closed Applications page (Figure 28). You have two years from the day your Application has been closed (i.e., set to the state of Closed – Cancelled, Closed – Completed, or Closed–Non-Compliant) to access the data. After two years, Closed Applications' data will be removed from CROWM, and archived in The City's electronic Archive system. After this time, should you need to access the data of a closed Application, you will have to fill out an Archive Retrieval Request form, and a ROWMS Section team member will be assigned to manually retrieve and e-mail you the archived data, after your service fee has been paid.
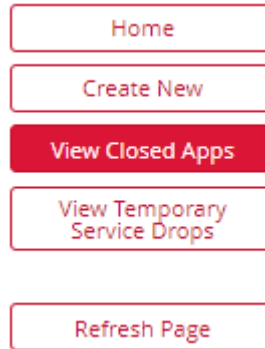
Figure 27: My Applications Page, View Closed Apps Button

Figure 28, My Closed Applications Search Parameters

If you click on the Search button, the search will be executed, and return a list of all Closed Applications. To search for Closed Applications with particular characteristics, fill in one or more of the search filter fields, and click the Search button. The search will be executed, and return a set of Closed Applications that match the search criteria. Repeating this step filling in additional fields will reduce the returned set even further.

The grid can be sorted by clicking the title of any of the columns. Clicking once will sort the grid in ascending order of the values in the selected column. Clicking the column title again will sort the grid in descending order of the values in the selected column. Clicking the column title a third time will remove the sort based on that column.

The contents in the grid can be filtered using the inline filtering field at the top of each column. Multiple column filters can be combined to reduce the number of rows displayed in the grid. Remove a column filter by selecting NoFilter from the dropdown menu next to the filter term field.

To view the details of a Closed Application, either double click on an Application row, or highlighting an Application row and clicking on the View button.

View Temporary Service Drops (search)

Clicking on the View Temporary Service Drops button will take you to the Temporary Service Drop Search page. Similar to the My Closed Applications page, there are several fields that you can use to search your Temporary Service Drop records. Temporary Service Drops submitted by all users of a Company are visible to all other users of the same Company, regardless of Utility Provider. To view the details of a record in the results list, double click the row, or click to highlight a record, then click the View Button.

My Administration

Purpose

The My Administration page (Figure 29) is only available to Utility Provider Administrators. The My Administration features are described below.
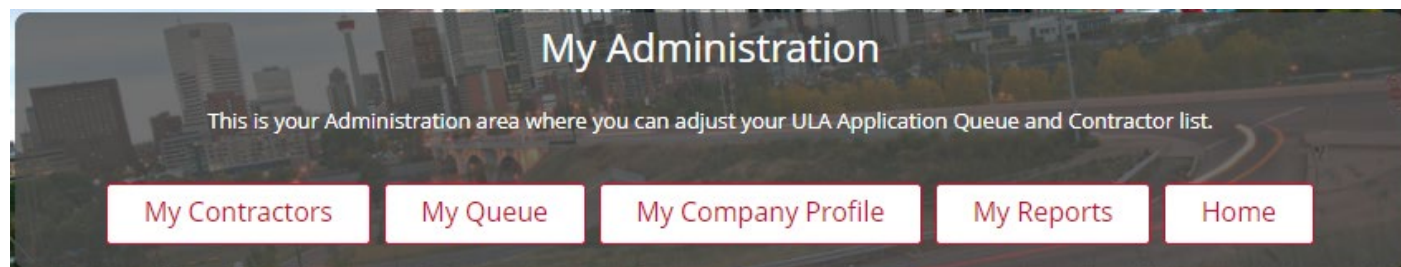
Figure 29: My Administration Page

My Contractors

The My Contractors page shows two lists, Available Contractors, and My Authorized Contractors. There are also buttons on the right for Home, My Administration, Manage ULA Application Restrictions, Manage PDF Authorizations, Authorize, and Revoke Privileges. The Authorize and Revoke Privileges buttons are inactive by default.

Your Utility Provider Client is the only one who can authorize your Company as a Contractor to submit ULA Applications on their behalf, through the My Administration, My Contractors page. If your specific Client cannot see this page, they must get one of their Business Administrators to do this for them.

The Available Contractors list shows the Companies that have registered with CROWM, but are not currently allowed to submit ULA Applications on behalf of the Utility Provider linked to the current logged-in User (Figure 30). This list will not include the name of the Utility Provider company associated with the current user. Active Utility Providers are always allowed to submit ULA Applications on their own behalf. To Authorize a Company as a Contractor, Select a Company from the Available Contractors list. The Authorize button will become active. Click the Authorize button. The page is refreshed, and the Selected Company that was on the Available Contractors list has now moved to the My Authorized Contractors list.

Available Contractors

- ☐ 10534358 CANADA LTD
- ☐ 1084429 ALBERTA INC
- ☐ 1084429 ALBERTA INC
- ☐ 1438652 ALBERTA INC
- ☐ 2107582 ALBERTA LTD; GATOR CONSTRUCTION GROUP INC
- ☐ 772722 ALBERTA LTD
- ☐ A R I FINANCIAL SERVICES INC
- ☐ AB MITCHELL AND PARTNERS LTD; STEPHEN BUGBEE ARCHITECTURE LTD

My Authorized Contractors

- ☐ myID_Test_CROWM_4USER_1 [FELICITAS POLSTERER]
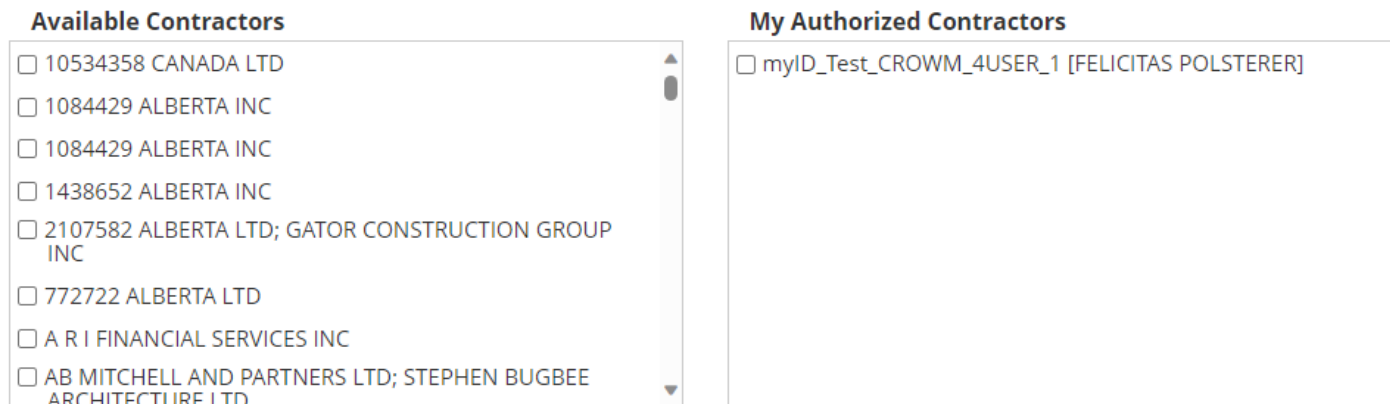
Figure 30: My Contractors Page

The My Authorized Contractors list shows the Companies that have been approved by the Utility Provider associated with the current user, to submit new ULA Applications on their behalf. To Revoke Privileges from a Contractor, select a Contractor from the My Authorized Contractors list. The Revoke Privileges button will become active. Click the Revoke Privileges button. The page is refreshed, and the selected Company that was in the My Authorized Contractors list has now moved to the Available Contractors list.

Managing Contractor ULA Application Restrictions

As a Utility Provider Administrator, you can further restrict your Contractors to only submit some types of Applications on your behalf. To limit the types of Applications a Contractor or Contractors can submit on your behalf, click on the Manage ULA Applications Restrictions button (Figure 31), and you will be taken to the Contractor ULA Application Capabilities page (Figure 32). The list of Contractors is the same as the list of authorized Contractors from the My Contractors page. Your own Company will also be listed, because as an Administrator you can limit the types of Applications your own Company's users can submit.

Figure 31: My Contractors Page, Manage ULA Application Restrictions

ULA Application Capabilities for Contractors

Contractor	Authorized ULA Application Types
[filter]	[filter]
myID_Test_CROWM_4USER_1 [FELICITAS POLSTERER]	Affordable Housing, Annual Permit, Infill Service Connection, Multi-Party Line Assignment, Single Line Assignment, Tree Replacement - Urban Forestry, Wireless Infrastructure Deployment Line Assignment
myID_Test_TELUS_ADMIN_1 [HAWS, BRADLEY]	Affordable Housing, Annual Permit, Infill Service Connection, Multi-Party Line Assignment, Single Line Assignment, Tree Replacement - Urban Forestry, Wireless Infrastructure Deployment Line Assignment

Select the contractor to authorize or restrict ULA Application submissions on your behalf.

My Authorized Contractors

[dropdown]

Figure 32: Manage ULA Applications Restrictions

Upon selecting a Contractor in the dropdown list (Figure 33) you will see:

- Restricted ULA Application Types checkbox list (should be initially blank if there are no restrictions);

- Authorized ULA Application Types checkbox list (should initially contain all available Application Types for the Utility Provider);

- Authorize ULA Application Type button – disabled (enabled when any of the checkboxes in the first checkbox list is checked); and

- Restrict ULA Application Types button – disabled (enabled when any of the checkboxes on the second checkbox list is checked).

Select the contractor to authorize or restrict ULA Application submissions on your behalf.

My Authorized Contractors

[myID_Test_TELUS_ADMIN_1 [HAWS, BRADLEY]]

Restricted ULA Application Types:
- ☐ Annual Permit
- ☐ Tree Replacement - Urban Forestry

Authorized ULA Application Types:
- ☐ Affordable Housing
- ☐ Infill Service Connection
- ☑ Multi-Party Line Assignment
- ☐ Single Line Assignment
- ☐ Wireless Infrastructure Deployment Line Assignment

[Authorize ULA Application Types]
[Restrict ULA Application Types]

Figure 33: Contractor ULA Application Capabilities – Selecting and Restricting My Authorized Contractor

To restrict the Application Types a Contractor can submit, select ULA Types from the RIGHT (Authorized ULA Application Types) checkbox list (Figure 33). Click on Restrict ULA Application Types button. Clicking

Cancel on the alert message will return you to the previous screen without making any changes. When you click "OK", a pop-up appears with the following alert message:

Are you sure you want to revoke the selected ULA Application types for the selected contractor from Application submissions? Click 'OK' to continue, or click 'Cancel' to back out?

Clicking Cancel will close the alert message and leave the page unchanged. Clicking OK will close the alert message, and update the Contractor's capabilities and restrictions. A green banner at the header indicates that the Contractor's Application Type capabilities have been updated. The selected item(s) from the RIGHT list is now part of the list on the LEFT.

To Authorize a Contractor to submit a previously restricted Application Type, select ULA Types from the LEFT (Restricted ULA Application Types) checkbox list. Click on Authorize ULA Application Types button. The page will immediately refresh, and a green banner at the header indicates that the Contractor's Application Type capabilities have been updated. The selected item(s) from the LEFT list is now part of the list on the RIGHT (Authorized ULA Application Types).

Managing Contractor PDF-based Application Restrictions

To manage Contractors' ability to submit PDF-based Applications, click on the Manage PDF Authorizations button (Figure 34). You will be taken to a page with two lists, My Authorized Contractors, and Contractors Authorized for PDF Submissions (Figure 35). The My Authorized Contractors list will include the name of the Utility Provider Company associated with the current user. Utility Providers that are "Active," and have been authorized to submit PDF based Applications may not want their own company to submit PDF drawing files due to the additional fees incurred by submitting PDF-based Applications. The Contractors Authorized for PDF Submissions list represents the Authorized Contractors that have also been authorized to submit some ULA Applications using a PDF drawing file instead of a MicroStation DGN drawing file.

Figure 34: My Contractors Page, Manage PDF Authorizations

My Authorized Contractors

☐ myID_Test_CROWM_4USER_1 [FELICITAS POLSTERER]

☐ myID_Test_TELUS_ADMIN_1 [HAWS, BRADLEY]

Contractors Authorized for PDF Submissions

Home

My Administration

Cancel

Authorize PDF

Revoke PDF

Figure 35: Manage PDF Authorizations Page

To authorize a Contractor to submit PDF-based Applications, select a Contractor from the My Authorized Contractors list. The "Authorize PDF" button is now active. Click the Authorize PDF button. The page will refresh, and the selected Contractor that was on the My Authorized Contractors list has now moved to the Contractors Authorized for PDF Submissions list.

To revoke a Contractor's ability to submit PDF-based Applications, select a Contractor from the Contractors Authorized for PDF Submissions list. The Revoke PDF button is now active. Click the "Revoke PDF" button. The page will refresh, and the selected Contractor that was on the Contractors Authorized for PDF Submissions list has now moved to the My Authorized Contractors list.

My Queue

The My Queue page (Figure 36) is for Utility Provider Administrators to move Pending Applications up and down their Application Queue. The My Queue page contains a grid containing all Pending ULA Applications, and navigation Buttons to the Home, and My Administration pages. The page has additional buttons to move Applications up and down the queue, but are disabled when no Applications are selected. The page also contains a grid of My Applications On Hold. These Applications are not in the queue, and are not available to be picked up by a Utilities Planning Specialist for review.

To move an Application up or down the queue, select an Application record/row. If the Grid contains only one row of Applications, the Up / Down buttons remain disabled. If the highest Application in the queue is selected, only the Down arrow is activated. If the lowest Application in the queue is selected, only the Up arrow is activated. If the selected ULA Application has rows above or below it, both the Up and Down Arrows are activated. Click the Up or Down buttons until the selected Application reaches the relative position you require, then click on the Save button. Repeat these steps to sort your queue the way you need.

As a matter of convenience, you can also manage your On Hold Applications from the My Queue page. The My Applications On Hold grid can be sorted by any of the columns in the grid. The contents in the Grid can be filtered by entering a filtering value at the top of each column. Multiple column filters can be combined to further reduce the number of rows displayed in the grid. To edit an On Hold Application, select a row from the grid. You can Edit the Application by double clicking the row or clicking the Edit button. You will be redirected to the Pending Summary page, where you can modify the Application, including removing the Hold. If you remove the Hold on a Pending Application, it will appear in the My Application Queue grid when you return to the My Queue page.

My Queue

My Application Queue

Total record count: 34

Queue Position	App Number	App Type	Pending State	Company	Date of Submission	Approx. Construction Start Date	Applicant Name	Address	Pr
126	A0000055861	Single Line Assignment	Pending Review	10534358 CANADA LTD	2022/01/26	2022/02/16	▮	133 PANATELLA SQ NW	28519C
128	A0000055888	Single Line Assignment	Pending Review	ENCEPTA CORP	2022/01/31	2022/03/02	▮	2137 33 AV SW	28615
141	A0000055937	Single Line Assignment	Pending Review	LTS INFRASTRUCTURE SERVICES LIMITED	2022/01/31	2022/03/25	▮	63 MYSTIC RIDGE WY SW	285702

Home

My Administration

↑

↓

Save

My Applications On Hold (not in queue)

Total record count: 2

App Number	App Type	Pending State	Project IDs	Project Managers	Company	Date of Submission
A0000056210	Single Line Assignment	On Hold	Pallas Station Rehabilitation		myID_Test_TELUS_AD [HAWS, BRADLEY]	2022/03/10
A0000056223	Single Line Assignment	On Hold	2579383, Ganymede Agridome Reconstruction	▮ Praxidike Meng	myID_Test_TELUS_AD [HAWS, BRADLEY]	2022/04/12

Edit

Figure 36: My Queue Page

My Company Profile

The My Company Profile page (Figure 37) provides:

- a summary of the Company including the name;

- a grid containing the list of all Company contacts, that can be edited, and added to;

- a button to return to the Home Page; and

- a button to return to the My Administration Page.

To add edit a Company contact, double click on a contact in the list, or select a contact in the list then click the Edit Contact button. Double clicking the selected row, or clicking the Edit Contact button opens the Company Contact edit page.

My Company Profile

Company Information

Company Name: myID_Test_522144_CROWM_USER [GLENBROOK COMMUNITY PRESCHOOL]
Current Priority Level: 2

Contacts

Total Contacts: 0

Name	Phone #1	Phone #2	E-mail #1	E-mail #2	Contact Type
No records to display.					

New Contact

Figure 37: My Company Profile Page

To add a Company contact, click the New Contact button which will open the Company Contact page (Figure 38) with page elements to add a basic summary of the New Contact, a Save, and Clear fields buttons. Fill in the form with the required information, and click the "Save" button. The new Company contact has been saved, and the Company Contact page has changed to "Edit" mode. You can see both the summary of the current information associated with the contact record, as well as a grid containing it's historic values.

Contact Information

*Contact Type: (select all contact types that apply to this contact information)

☐ Capital Works Representative
☐ Emergency
☐ General Notification

*Name:

*Phone #1:
(___) ___-___ x____

*E-mail #1:

Phone #2:
(___) ___-___ x____

E-mail #2:

Comments:

Save   Clear Fields

Figure 38: Adding a New Company Contact

My Reports

The My Reports page, only available to Company Administrators (i.e., both Utility Provider and Contractor), provides a Report Type Dropdown List, and a Home button. Available reports are:

- Application Expiry Date Report – available to Utility Provider and Contractor Administrators, and provides summary data of Applications, with a focus on Expiry Dates and the number of days until each Application expires;

- Line Deviation Review Outcome Report – available only to Utility Provider Administrators, and provides summary data of Applications for which Deviation Requests have been submitted;

- Request for Information Report – available only to Utility Provider Administrators, and provides summary data of Applications for which Additional Information was required;

- Temporary Service Drop Report – available to Utility Provider and Contractor Administrators, and provides summary data of active Temporary Service Drop Applications;

- ULA Application Freeze Report – available only to Utility Provider Administrators, and provides summary data of Applications that have been Frozen only for the Utility Provider of the logged-in user. Applications where the Utility Provider of the logged-in user not the Primary Utility Provider (i.e., on Multi-Part, or Wireless Infrastructure Deployment Line Assignment Applications) will not appear in this report;

- ULA Applications Report – available to Utility Provider and Contractor Administrators, and provides summary data of Applications submitted between specified dates; and

- Utility Provider Contractor ULA Application Restrictions Report – available only to Utility Provider Administrators, and provides summary data of the Application submission restrictions placed on Companies authorized as Contractors for the Utility Provider of the logged-in user.

Select the report you want from the dropdown menu, fill in any required fields, and any optional fields you want. If the report parameters result in a dataset to report, the report can be downloaded, and viewed from a pop-up dialogue generated by the browser. If the download pop-up does not appear, you may have to add crowm.calgary.ca to your browser's list of sites to allow pop-ups.

If the report parameters were too restricting, the report will not be generated. If the report appears to run, but nothing seems to happen, make sure you have either turned off your browser's pop-up blocker, or have enabled Calgary.ca to open pop-ups.

Help

It is the responsibility of the Utility Providers to ensure their agents, and Contractors are trained in the policies and procedures of the ULA process, and the use of CROWM. To assist you in getting up to speed on using CROWM, please see the FAQ page, and the video tutorials. If your question still cannot be answered with those resources, e-mail your question to ULASupport@calgary.ca.

Expired Applications

For *Applications* that are in the state of *In Progress – Approved Application Expired*, and *In Progress – As-Built Submission Expired* here are a few tips to get your submissions to ExpiredCROWMSubmissions@calgary.ca addressed efficiently:

- *In Progress – Approved Application Expired*
  - Include the *Application Number* (i.e., looks like A0000099999) in the subject line of a separate e-mail for each *Application*;
  - Attach the required ExcavationPermitList_Template.xlsx; and
  - Clearly state the request in the message body, for example:
    - "*Please update the Construction Complete date for A000009999 to 2022-12-31.*" Or
    - "*Please cancel Application A0000099999, for the following reasons …*"

NOTE: You will have 90 days from the Construction Complete date to submit the As-Built drawing, if required. If the Construction Complete date is entered later than 90 days, the Application will automatically expire again at 18:00 the same day the date was entered, either by an External User or an Internal User.

NOTE: from line 38 of the ExcavationPermitList_Template.xlsx, "*In the very rare circumstance that an Excavation (ePermit) Permit is not required, this Excel spreadsheet must still be uploaded when entering the Construction Complete date in CROWM. The content of the list must then provide the source and details of the rationale for the Excavation Permit exemption.*

- *In Progress – As-Built Submission Expired*
  - Include the *Application Number* (i.e., looks like A0000099999) in the subject line of a separate e-mail for each *Application*;

- o Attach the required *As-Built* drawing that conforms to the [CROWM As-Built Template.dgn](); and
- o Clearly state the request in the message body, for example:
  - ▪ "*Please find attached the As-Built for A000009999.*" Or
  - ▪ "*Please cancel Application A0000099999, for the following reasons …*"

NOTE: Do not attach the Drawing Checker Report. CROWM will automatically run the Drawing Checker, and attach a report to the Application record when an Internal User uploads the drawing file to an expired Application. Submitting the As-Built is usually the end of the Applicant's obligations under the CROWM process. It is possible errors are found during the review that require a new As-Built drawing to be provided. Otherwise, the As-built will be accepted, or the Installed Equipment will be deemed Non-Compliant. Cancelling an Application in this state only results in any installed, or partially installed equipment being deemed Non-Compliant.

Rejected – At Fault

You are be able to upload a new design file, .dgn, when resubmitting an Application that was Rejected – At Fault. Should you choose to withdraw your Application, or allow it to expire, you will forfeit the non-refundable Application Fee (currently $200).

Maintenance Outages

At least once a month, and once per quarter, an outage of CROWM will be scheduled to allow for regular server updates and maintenance. When such an outage is scheduled, a maintenance alert message will be displayed on the Welcome page (Figure 39). Similar outages will also be scheduled to enable the deployment of updates, and/or fixes to the CROWM web application. Outages scheduled for updates, and/or bug fixes will also be announced with a Maintenance Alert message.
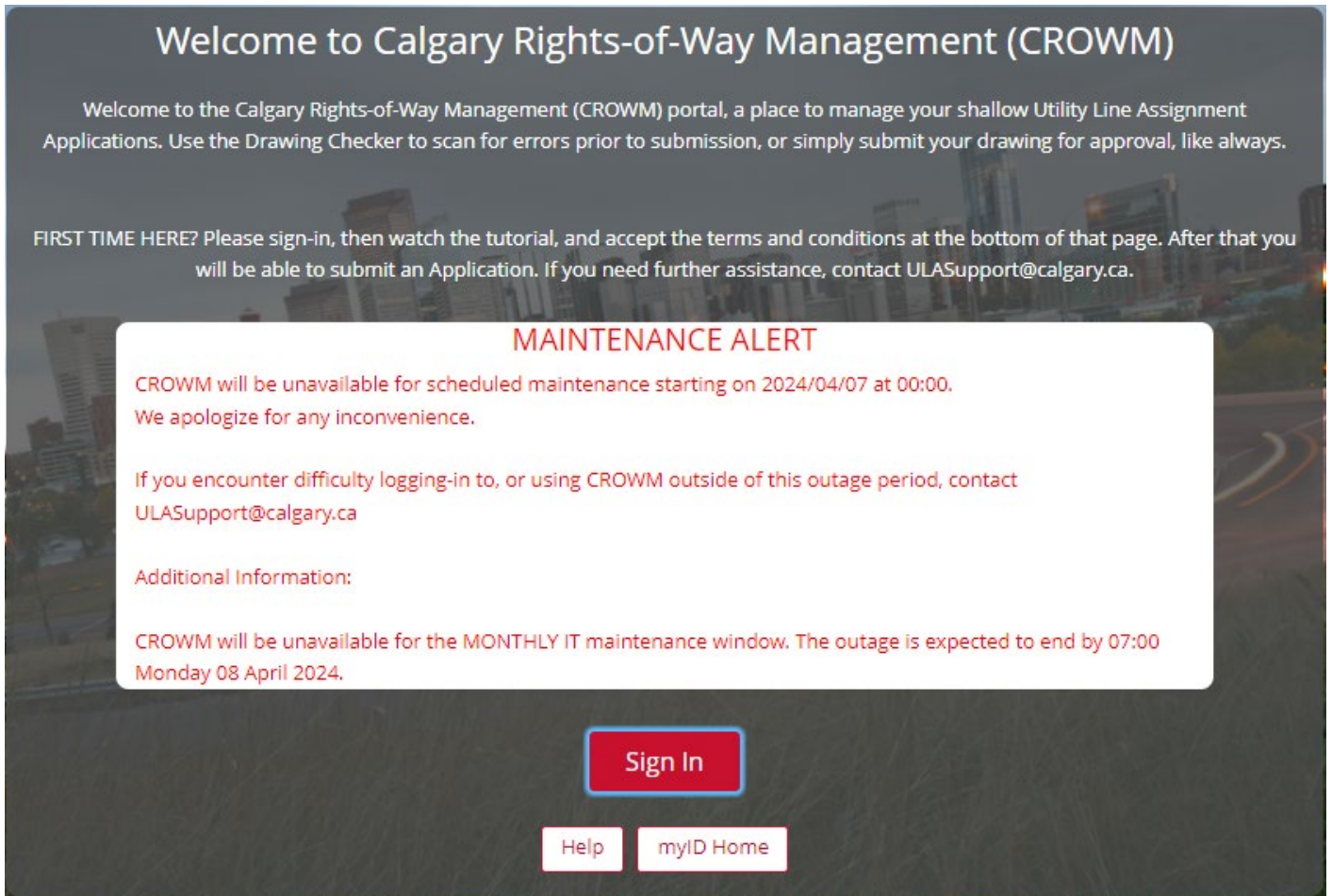
Figure 39: CROWM Welcome Page Maintenance Alert

Do Not Send e-Mail List

If you see the error message in Figure 40, it means that at least one of the e-mails associated with your Application have been added to the Do Not Send e-Mail List:

Figure 40: Do Not Send e-Mail List Alert

The Do Not Send e-Mail List is maintained to reduce as much as practicable the number of bounce-back messages generated from CROWM's automatic Notifications. Having a lot of messages bounce back is one metric used by our e-mail service to identify spam mailers. To avoid CROWM being identified as a source of spam, CROWM has the Do Not Send e-Mail list to prevent CROWM from sending Notifications to addresses that frequently bounce them back. Therefore, if your e-mail address has been added to the Do Not Send e-Mail list, it means that we have received at least 10 bounce-backs from your address in the preceding three months. To have your e-mail address removed from the list, contact ULASupport@calgary.ca and confirm that your e-mail address is valid, and monitored regularly.