EW/MA Advisory Procedures Manual/ User Guide



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Learning about the Early Warning System

The Early Warning/Maintenance Advisory (EW/MA) system (or Early Warning for short) is a web-based application that enables the rail industry to identify mechanical problems on rail equipment that could impact the safe movement or handling of the equipment. Authorized users can create Maintenance Advisory (MA) and Early Warning (EW) notices, issue supplements to notices, assign equipment to notices, report inspections and repairs for equipment, and perform queries of notices and equipment.

This system consists of three processes:

- The *first process* is the creation of an EW/MA Notice. The EW/MA notice provides the rail industry a description of the mechanical problem, its severity, and other information applicable to the notice. When the initial notice is updated to provide additional information about the mechanical problem, a supplemental notice is created. Supplemental notices are inclusive and supersede all prior notices. The Association of American Railroads (AAR), Safety & Operations Department is responsible for the creation of EW/MA Notices and Supplemental Notices.
- The *second process* is the assignment of equipment to the EW/MA Notice identified by the industry as having the applicable mechanical problem. The authority to assign equipment to a notice is determined by the AAR Safety & Operations Department when the EW/MA Notice is created. The AAR Safety & Operations Department personnel may permit equipment owners or specific companies to assign equipment to the notice or restrict the assignments to AAR Safety & Operations Department personnel. The Umler Component Registry can automate the assignment of equipment to component-related notices by associating a Component Registry recall query with an EW/MA notice.
- The *third process* is locating the equipment and performing the work defined in the EW/MA. If the work cannot be done at its present location, a preliminary inspection may be reported to the system. A preliminary inspection provides a 'movement' status of the equipment (i.e., car moving to shop). Once the defined work on the equipment is performed, a final inspection is reported to the system and the equipment is removed from the EW/MA Notice.

The EW/MA system enables the creation of the EW/MA Notice, the assignment of equipment to the notice, and the reporting of inspections and repairs performed on the equipment. The system includes a set of notifications or "ticklers" to alert users when EW/MA Notices have been created, when their equipment has been added to or removed from a Notice, and when a Notice is approaching escalation. Additionally, users have the ability to interact with the EW/MA system via Web Services, enabling them to perform queries of the system and report equipment inspections.

The EW/MA system automatically distributes updated information via TRAIN II outbound messages to rail industry subscribers. A subscriber to these messages may receive all updates to the EW/MA system (known as broadcast messages) or they may elect to receive only updates on their equipment (known as direct addressed messages).

There is also an EW/MA batch message system, which may be used as an alternative for reporting updates to the EW/MA system. The EW/MA batch message system processes inbound EW/MA assignment and inspection messages and distributes the updated information via TRAIN II outbound messages to rail industry subscribers.

Although the batch message system processes inbound EW/MA assignments and inspections, it does not accept inbound EW/MA Notices. EW/MA Notices can only be created by the AAR using the EW/MA user interface as described in this document.

Additional processing is required in the EW/MA batch system. The batch processing must edit the inbound message to ensure the message is formatted properly. As part of this process, if errors are found in the inbound message structure, the originator/submitter of the message may elect to receive Envelope Error Messages, which identify applicable errors. For example, if the detail count defined in the summary record did not match with the accumulated system count, an envelope error message would be generated. Although receipt of this message is optional, it is highly recommended that all submitters of inbound messages request receipt of this message to ensure proper handling of the inbound message.

Inbound message submitters may also elect to receive Acknowledgment Messages. An Acknowledgement Message is returned to the originator of the inbound message acknowledging that the EW/MA system received the inbound message.

EW/MA Integrated System

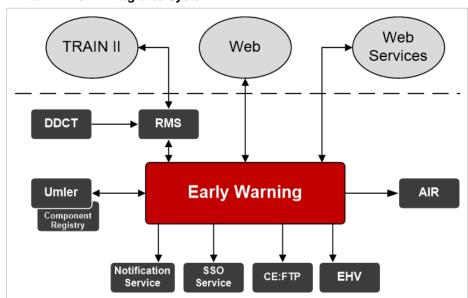


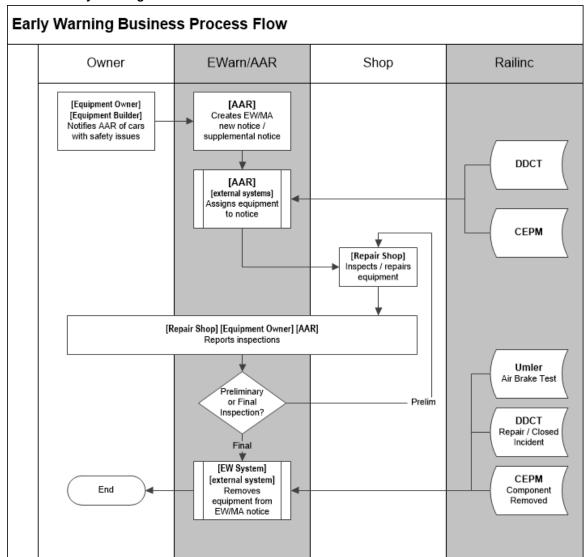
Exhibit 1. EW/MA Integrated System

Related Documents

- AAR Office Manual Rule 125 (order via http://www.aarpublications.com/).
- Component Tracking User Guide.
- <u>EW/MA Advisory Procedures Manual/User Guide</u>, also accessed from the References menu item in Early Warning.
- <u>Early Warning TRAIN II Technical Guide</u> (also accessed from the <u>Early Warning</u> page on Railinc.com).
- Early Warning Web Services Documentation—contact the Railinc Customer Success Center (CSC). Call (877) 724-5462 or email csc@railinc.com to request Early Warning Web Services documentation.

Process Flow

Exhibit 2. Early Warning Business Process Flow



User Roles

Early Warning enables *Standard* users to:

- Query existing MAs and EWs (Exhibit 3)
- View Transaction Logs and details
- View Configure Ticklers and edit email addressees
- View User documentation

Early Warning enables Inspection Reporter users to:

- Query existing MAs and EWs
- View Transaction Logs and details
- View Configure Ticklers and edit email addressees
- View User documentation
- Report Inspections for MAs and EWs (including backouts and equipment unassignments)

Early Warning enables *Company Administrators* users to:

- Query Existing MAs and EWs
- View Transaction Logs and details
- Report Inspections for MAs and EWs (including backouts and equipment unassignments)
- View Configure Ticklers and edit email addressees
- View User documentation
- Assign other SSO users within their company (except themselves) Early Warning tasks in SSO:
 - Query (shown for new users only)
 - Assigning Equipment to notices
 - Reporting Inspections (includes backing out inspections and unassigning equipment via inspection reporting interface)
 - Creating Notices (includes creating supplements and working with attachments, but does NOT include assigning equipment to those notices)
 - Create other Company Admins (e.g., a company admin backup)

Early Warning enables Railinc Application Administrators to:

- Assign *any* other user advanced Early Warning tasks in SSO, including internal Railinc application admin (e.g., an application admin backup)
- Ouerv Existing MAs and EWs
- Create new MAs or EWs
- Assign Equipment to MAs and EWs
- Submit Supplements to MAs and EWs
- Attach documents to MAs and EWs
- Report Inspections for MAs and EWs
- Unassign equipment from notices via inspection reporting interface
- View Transaction Logs and details
- Back Out inspections
- View Configure Ticklers and edit email addressees
- View User documentation

General User Interface and System Requirements

General user interface information (typical keyboard selection equivalents and shortcuts), as well as system requirements are available in the *Railinc UI Dictionary*.

Note: Mandatory fields are indicated with a **red asterisk** (*).

Accessing the Railinc Customer Success Center

The Railinc Customer Success Center provides reliable, timely, and high-level support for Railinc customers. Representatives are available to answer calls and respond to emails from 7:00 a.m. to 7:00 p.m. Eastern time, Monday through Friday, and provide on-call support via pager for all other hours to ensure support 24 hours a day, 7 days a week. Contact us toll-free by phone at 877-RAILINC (1-877-724-5462) or send an email directly to csc@railinc.com.

Getting Started

The Early Warning application is accessed using the Railinc Single Sign-On (SSO), a web application that provides convenient access to a variety of Railinc products. If you have an SSO login, go to the Railinc portal at https://public.railinc.com/ and log into SSO by selecting the Customer Login link in the top right corner. Enter your user ID and password in the fields and select Sign In.

Register to Use Railinc SSO

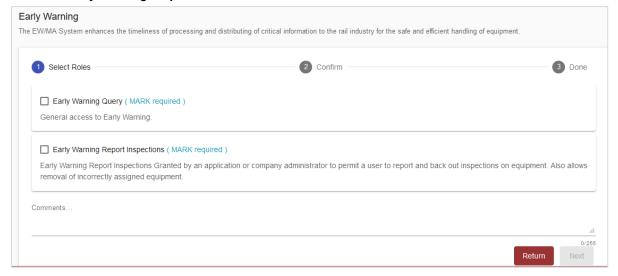
Each Early Warning user must register to use Railinc Single Sign-On. Refer to the *Railinc Single Sign-On User Guide* for detailed instructions.

Once your SSO registration is complete, you must request access to Early Warning within SSO.

Requesting Early Warning Access

After authorization to use Railinc SSO is received, you must request general access to Early Warning with a specified Company ID by following instructions in the <u>Railinc Single Sign-On</u> <u>User Guide</u>.

Exhibit 3. Early Warning Request Permission Form for New Users



Once you receive an email notification that access has been granted to Early Warning, you can then log on and begin using Early Warning.

Getting Started Logging In

Logging In

To log into Early Warning:

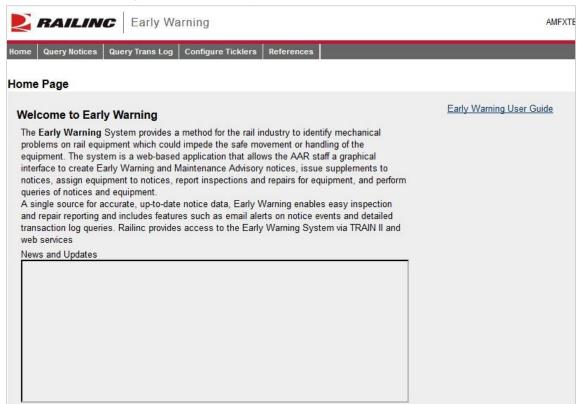
1. Open your internet browser and enter https://public.railinc.com to open the Railinc website.

- 2. Select the **Customer Login** link in the upper right of the page. The Account Access page is displayed.
- 3. Enter your User ID and Password. Select Sign In. The Railinc Launch Pad is displayed.

Note: For more information about the Launch Pad, refer to the <u>Railinc Single Sign-On User Guide</u>.

4. In **My Applications**, select **Early Warning**. The Early Warning Welcome page is displayed (Exhibit 4).

Exhibit 4. Welcome Page for standard query user



The main menu is displayed (<u>Exhibit 5</u> or <u>Exhibit 6</u>). Continue by selecting a menu item (see <u>Exhibit 7</u>).

Getting Started Logging Out

Exhibit 5. Early Warning Main Menu for Regular Users



Exhibit 6. Early Warning Menu for Company/Admin Authorized Users



The Early Warning Welcome page can have the following menu items:

Exhibit 7. Early Warning Application Menu Functions

| Welcome Page | Returns to your Home Page (similar to Exhibit 4). | |
|--------------------|---|--|
| Create Notice | Opens the Create Notice panel (<u>Exhibit 8</u>). | |
| Report Inspection | Opens the Report Inspections panel (<u>Exhibit 25</u>). | |
| Query Notices | Opens the Early Warning Query panel (Exhibit 33). | |
| Query Trans Log | Opens the Transaction Log page (Exhibit 58). | |
| Configure Ticklers | Opens the Configure Ticklers page (Exhibit 64). | |
| References | Opens the EW/MA Advisory Procedures/User Guide in a | |

new window (Exhibit 65).

Note: Menu content varies based on role-based permissions granted by the Railinc Application SSO Administrator. See the Company SSO Administrator to request additional permissions beyond Query.

Logging Out

Select the **Launch Pad** link to end an Early Warning session. You are returned to the Launch Pad, but you are still signed in.

To close one SSO application when multiple applications are open in separate browser windows, close the unwanted session window by selecting the **Launch Pad** link or **X**. Do NOT select the **Sign Out** link—it ends the entire Single Sign On session (and *all* open SSO applications).

Create Notice

Only users authorized to create and maintain Early Warning notices in SSO can perform these processes. If you are authorized, the Create Notice menu item is displayed (Exhibit 6).

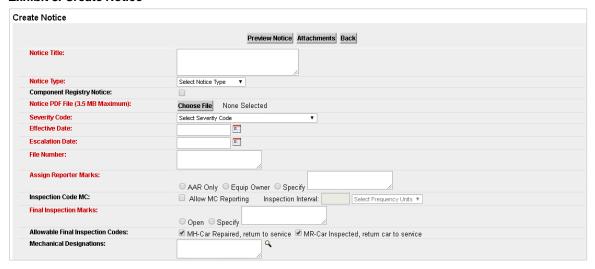
Authorized users can create Early Warning notices, including the following:

- Create the Basic Notice
- Preview the Notice
- <u>Assign Equipment</u>—This is not required for Component Registry Notices to be associated with a Component Registry Recall Query.
- Submit the Notice
- Edit the Notice

Create the Basic Notice

1. Select **Create Notice** on the main menu. The Create Notice panel is displayed (Exhibit 8).

Exhibit 8. Create Notice



2. Complete the fields for the new notice. Required fields are in red. Fields for the Create Notice are shown in Exhibit 9.

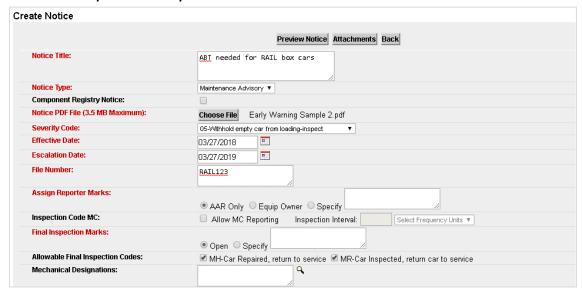
Exhibit 9. Basic Create Notice Fields

| Notice Title | Up to 80 characters that simply identifies the notice content. | | |
|------------------------------|--|--|--|
| Notice Type | Select Early Warning (EW) or Maintenance Advisory (MA). | | |
| Component Registry Notice | Check the box to indicate a component recall is involved. No manual assignment of Equipment IDs is involved when this box is checked. | | |
| Notice PDF | Upload the PDF to use. When a PDF is uploaded, it shows the PDF that is being used and can be overridden by selecting a new file. Every time the form is validated and refreshed, the selected PDF may be dropped and may need to be added again. | | |
| Severity Code | Valid values are: Exhibit 10. Severity Codes | | |
| | Select Severity Code Select Severity Code 01-Stop car, loaded or empty, do not move 02-Stop car, loaded or empty, transfer load 03-Stop car, loaded or empty, inspect 04-Withhold empty car from loading-contact owner 05-Withhold empty car from loading-inspect 06-AAR Defined XX-Prohibited in interchange | | |
| Effective Date | Use calendar picker to select the date the notice become effective. Cannot be earlier than today. | | |
| Escalation Date | Use calendar picker to select the date the notice escalates (refer to AAR Interchange Rule 125 in the <i>Office Manual of the AAR Interchange Rules</i>). Default is today, but is automatically set to one year when the Effective Date is selected. Must be <i>later</i> than the Effective Date . | | |

| File Number | Your assigned file number in accordance with company standards. Up to 12 |
|----------------------|--|
| | characters and spaces. Cannot contain special characters like \$ % & * + = |
| | ? or /. |
| Assignment | Select radio button for AAR only , Equipment Owner , or Specify . If Specify |
| Reporter Marks | is selected, complete the text box also, (1–4 characters separated by spaces, no |
| | mark limit). |
| Inspection Code | Check box to Allow MC Reporting . Specify an inspection interval by |
| MC | entering a numeric value and selecting a unit. |
| Final Inspection | Select either the Open or Specify radio button. If Specify is selected, also |
| Marks | make appropriate entry in the text box (1–4 characters separated by spaces, no |
| | mark limit). Additionally, check the appropriate boxes to indicate which final |
| | inspection codes can be used—MR, NH, or both (default). |
| Allowable Final | MR-Car Inspected, return car to service and MH-Car Repaired, return |
| Inspection Codes | car to service are selected by default. |
| Mechanical | If known, use the Mechanical Designation field to restrict the notice to those |
| Designations | groups. (1–4 characters per designation separated by spaces, no limit). Use the |
| | Mechanical Designations search icon \(^{\mathbb{A}}\) to look for Mechanical Designations |
| | (Exhibit 57). |
| Attachments (button) | Use the Attachments button Attachments to attach a file. |

A sample MA entry is shown in Exhibit 11.

Exhibit 11. Sample MA Notice prior to Preview



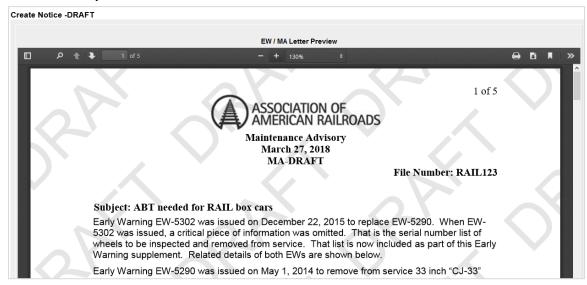
Note: Selecting **Back** returns to the Welcome page (Exhibit 4).

- 3. When the fields are completed, select **Preview Notice**.
 - a. *If errors are found in the fields*, the draft notice is not generated. The errors are identified by field at the top of the panel. You must return to those fields, correct the errors, and select **Preview Notice** again.
 - b. *If no errors are found*, the preview letter is shown (Exhibit 12.). See Preview the Notice for more information.

Preview the Notice

When you select Preview Notice and no errors are found, the displayed letter is similar to <u>Exhibit 12</u>..

Exhibit 12. Sample Preview Notice



1. Read the notice thoroughly for accuracy and then choose a processing option (Exhibit 13).

Exhibit 13. Preview Processing Options



| Submit Notice | Submits the notice for publication as is shown. | | |
|---------------|---|--|--|
| Edit Notice | If errors or omissions have been identified and you want to correct them, this | | |
| | return you to the Create Notice panel (Exhibit 8) to make corrections and | | |
| | preview again. | | |
| Assign | Not required for Component Registry Notices. | | |
| Equipment | | | |
| | Enables you to assign specified equipment IDs to the notice. If done before | | |
| | submitting, the assigned equipment is included on the notice. See <u>Assign</u> | | |
| | Equipment for more information. | | |
| | Assign Equipment selected after a notice is already submitted appends | | |
| | equipment to the notice without creating a supplement. Automatically | | |
| | assigned equipment from an associated Component Registry recall query also | | |
| | does not create a supplement. | | |
| Back | Returns you to the Create Notice panel (Exhibit 8) to make corrections and | | |
| | preview again. | | |

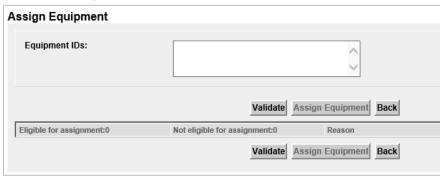
Assign Equipment

Note: You must have the Assign Equipment permission in SSO to perform this task. If authorized, the Assign Equipment button appears on the interface. This step is not required for Component Registry notices being associated with a Component Registry Recall Query, which automatically assigns affected equipment. Refer to the Umler Component Registry Administrator Guide (available to authorized users).

When a notice Preview is satisfactory, you can choose to Assign Equipment to it. To assign equipment:

1. On the Letter Preview, select **Assign Equipment**. The Assign Equipment panel is displayed (Exhibit 14).

Exhibit 14. Assign Equipment



Note: Selecting **Back** returns to the Preview panel (Exhibit 12.).

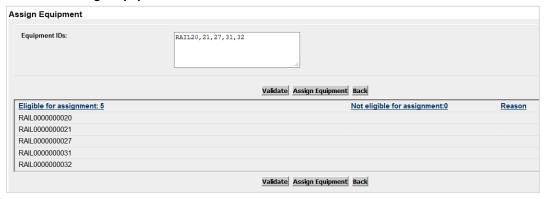
2. Enter or paste equipment numbers in the field at left, separated by spaces or commas. When equipment IDs have been entered in the field, the command buttons become active (<u>Exhibit 15</u>).

Exhibit 15. Assign Equipment with IDs entered



3. Select **Validate**. The system validates the Equipment IDs against Umler and posts the results in the columns in the table (Exhibit 16).

Exhibit 16. Assign Equipment after Validation

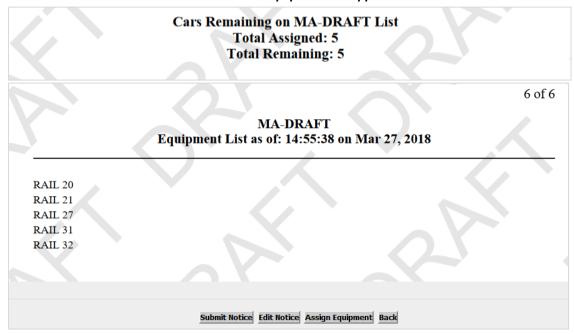


Note: Selecting **Back** returns to the Preview panel (Exhibit 12.).

4. If any IDs entered are eligible for assignment, select **Assign Equipment**. The Create Notice Preview Letter is redisplayed. Scroll to the bottom where the equipment IDs that have been assigned appears (Exhibit 17).

Note: If Equipment IDs are assigned *after* a notice is published, a confirmation panel (Exhibit 20) is displayed to indicate the notice had equipment added. Select **OK** to close the panel. Scroll to the bottom of the Notice View letter to confirm the equipment ID addition.

Exhibit 17. Create Notice Letter Preview with Equipment IDs appended to bottom



5. Choose a processing option (Exhibit 18):

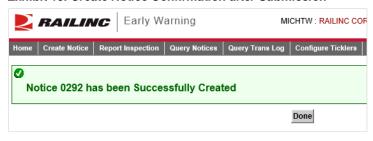
Exhibit 18. Preview Processing Options after Assigning Equipment

| Submit Notice | Submits the notice for publication as is shown. Continue with <u>Submit the</u> | | |
|---------------|---|--|--|
| | Notice. | | |
| Edit Notice | If errors or omissions have been identified and you want to correct them, this | | |
| | returns you to the Create Notice panel (Exhibit 8) to make corrections and | | |
| | preview again. Cars assigned are deleted. | | |
| Assign | Enables you to assign specified equipment IDs to the notice. If done before | | |
| Equipment | submitting, the assigned equipment is included on the notice. See <u>Assign</u> | | |
| | Equipment for more information. | | |
| | Note: Assign Equipment selected after a notice is already submitted appends equipment to the notice without creating a supplement. | | |
| Back | Returns you to the Create Notice panel (Exhibit 8) to make corrections and | | |
| | preview again. Cars assigned are deleted. | | |

Submit the Notice

When the Preview notice appears correct and has the appropriate Equipment IDs added, select **Submit Notice** to publish. A Confirmation panel is displayed for the published notice (<u>Exhibit 19</u>).

Exhibit 19. Create Notice Confirmation after Submission



Select **Done** to return to the Welcome page (Exhibit 4).

To edit an existing notice after submission, you must do a query to locate the new notice. Then, see Edit the Notice for more information.

Edit the Notice

The **Edit Notice** button can only be used during the Create Notice process. Currently, the **Back** and **Edit Notice** buttons have the same function for unsubmitted notices.

Once the notice has been submitted (published), you must use either of two editing functions:

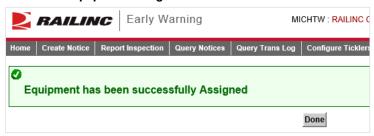
- Assign Equipment after Submitting
- Create a Supplement

Assign Equipment after Submitting

The **Assign Equipment** button enables you to add equipment IDs to a submitted notice without changing the body of the notice itself. This action does NOT create a supplement.

- 1. Find the existing notice using a query. See **Query Notices** for more information.
- 2. After locating the notice, select the row to open the notice view panel (similar to Exhibit 39).
- 3. Select **Assign Equipment** and continue as described in <u>Assign Equipment</u>. The following confirmation is shown when adding equipment to an existing notice (<u>Exhibit 20</u>).

Exhibit 20. Equipment assigned to Notice



4. Select **OK** to return to the Notice View panel, scroll to the bottom to verify the additions.

Create a Supplement

The **Create Supplement** button enables you to create a supplement that supersedes the original notice (or previous supplement). Assigned Equipment IDs do not change. Effective Date and Notice Type remain the same. This can be used to alter the escalation date, or other remaining fields. Assigning additional Equipment IDs must be done separately, either before or after a supplement is created.

To create a supplement:

- 1. Find the existing notice by using Query Notices.
- 2. After locating the notice, select the row and click the Notice # to open the notice view panel (see Exhibit 39 for example).

3. Select **Create Supplement**. The Create Supplement Notice panel is displayed with the body of the notice displayed in editable fields (Exhibit 21).

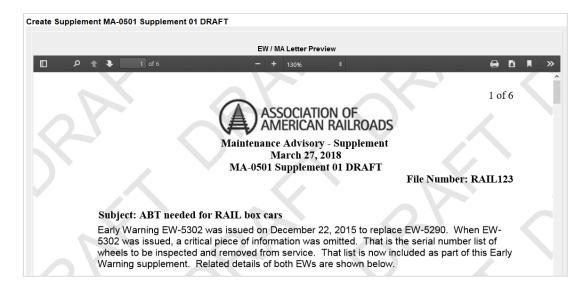
Exhibit 21. Create Supplement Notice



4. Make the required changes. See <u>Create the Basic Notice</u> for field information. Then select **Preview Notice**. The **Create Supplement Notice Preview** is displayed (<u>Exhibit 22</u>).

Exhibit 22. Create Supplement Notice Preview

Review the changes and select a processing option (Exhibit 22).



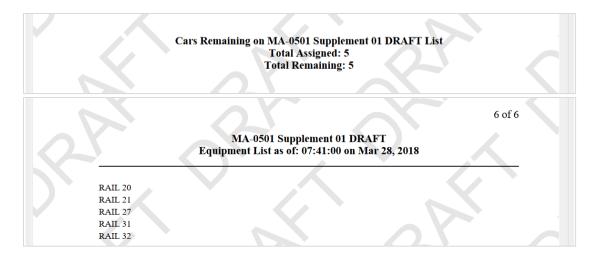
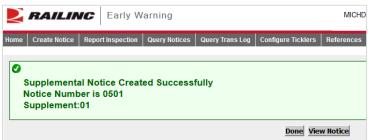


Exhibit 23. Notice View Processing Options

| Submit Notice | Submits the changes and displays a confirmation message (Exhibit 24). | |
|----------------------|---|--|
| Edit Notice | Returns to the Create Supplement Notice panel (Exhibit 21) to make changes. | |
| Assign Equipment | Opens the Assign Equipment panel (Exhibit 14). | |
| | You must be authorized to add equipment. | |
| Back | Returns you to the Create Supplement Notice panel (Exhibit 21). | |

Exhibit 24. Supplement Submission Confirmation



5. Select **Done** to return to Supplement Notice View. Then select **Back** to return to the Query Notices Result table (see <u>Exhibit 38</u> for example). The new supplement is identified in the table.

Report Inspection

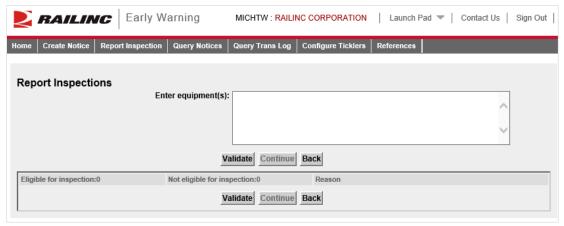
The Report Inspection function is restricted to authorized users as established by each Company Early Warning or SSO Administrator and is not displayed to unauthorized users. Inspection updates may also be further restricted to specific equipment marks, as determined by the associated EW/MA Notice. See Exhibit 9 for more information on inspection authorizations.

Reporting Inspections can be done directly from the menu as described below or from a query (Report Inspections from a Query).

Report Inspections from the Menu

Select **Report Inspections** on the main menu. The Report Inspections panel is displayed (<u>Exhibit</u> <u>25</u>).

Exhibit 25. Report Inspections



Reporting Inspections has multiple steps:

- 1. Enter Equipment IDs
- 2. Validate Equipment IDs
- 3. Enter Inspection Data
- 4. Validate Inspections
- 5. Submit Inspections

Enter Equipment IDs

1. On the blank Report Inspections panel type or paste the Equipment IDs from a spreadsheet or list.

Exhibit 26. Report Inspections after entering Equipment ID



Note: Selecting **Back** returns to the Welcome page (Exhibit 4).

2. Select **Validate** and continue with <u>Validate Equipment IDs</u>.

Validate Equipment IDs

When you have entered Equipment IDs and selected Validate, the panel is redisplayed with the validation results.

Exhibit 27. Report Inspection after Validation



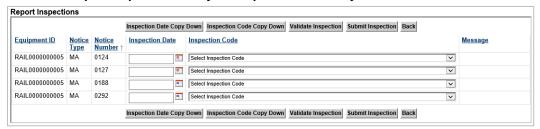
Note: Selecting **Back** returns to the Welcome page (Exhibit 4).

If equipment is identified in the Eligible for Inspection column, select **Continue**. Continue with Enter Inspection Data.

Enter Inspection Data

When the Equipment ID(s) validate successfully and you select Continue, the Report Inspection panel displays a table of Equipment IDs with their related notice types and numbers (Exhibit 28).

Exhibit 28. Report Inspections ready for inspection data entry



Note: Selecting **Back** returns to the post-equipment validation page (Exhibit 27).

- 1. For each occurrence of the equipment ID, select the following:
 - a. **Inspection Code**. Valid values and definitions are listed in the table below. For further details, refer to AAR Interchange Rule 125 in the *Office Manual of the AAR Interchange Rules*.

Note: For information about ordering the *AAR Interchange Rules*, call 1-877-999-8824 or visit www.aarpublications.com.

| Activity Code | Definition | MA/EW Status | Applies To |
|------------------|---|-----------------|---------------|
| MC | Car inspected | Open | MA & EW |
| | Return car to service | | |
| | Continued inspections required | | |
| ME | Car inspected and moving to shop | Open | MA & EW |
| MF | The final inspection MH or MR was reported in error | Open | MA & EW |
| | Revert car to prior severity code | | |
| | MF can only be reported by the reporter of the prior activity code or the AAR | | |
| MP | • The prior preliminary inspection ME/MC was reported in error | Open | MA & EW |
| | Revert car to prior severity code | | |
| | MP can only be reported by the reporter of the prior activity | | |
| | code or the AAR | | |
| MW | Car moving on AAR-approved owner's instructions | Open | EW |
| | Also includes move to scrap | | |
| | Requires Transportation Code SX | | |
| MZ | Car inspected | Open | EW |
| | Moving unrepaired for unloading | | |
| MB | EW cancelled by AAR | Final | EW |
| МН | Car repaired | Final | MA & EW |
| | Return to service | | |
| MI | Car deleted from Umler file | Final | MA & EW |
| | Reported by the AAR | | |
| MK | MA cancelled by AAR | Final | MA |
| MN | Car incorrectly added to EW or upgraded to another EW | Final | MA & EW |
| | Reported by AAR | | |
| MR | Car inspected | Final | MA & EW |
| | Return car to service | | |
| | No continued inspection required | | |
| MY | Car moved from MA to EW | Final | MA & EW |
| | Can only be reported by AAR | | |
| | • See MA's | | |

Note: When all cars have the same code as the first entry, use the **Inspection Code Copy Down** button to choose the same for the remainder.

b. **Inspection Date**. Select the calendar icon to select the correct date of inspection. The date cannot be in the future.

Note: When all cars have the same inspection date as the first entry, use the **Inspection Date Copy Down** button to choose the same for the remainder.

2. When all entries have been made, select **Validate Inspection**. Continue with <u>Validate Inspections</u>.

Validate Inspections

After you select **Validate Inspections**, the system compares the Inspection Code selected to the requirements of the related notice, and displays the results in the Message column (<u>Exhibit 29</u>).

Exhibit 29. Report Inspections after validation



Note: Selecting **Back** returns to the post-equipment validation page (Exhibit 27).

If all validate properly, continue with **Submit Inspections**.

Note: If validation is not possible, view the notice to see what restrictions might have been involved in the notice for the car.

Submit Inspections

When inspections have validated successfully, select **Submit Inspection**, and the panel redisplays with a successful submission message.

Exhibit 30. Report Inspections after successful submission



Note: If the inspection was submitted incorrectly, it can be "backed out" using the Query Trans Log task. See <u>Back Out Inspection</u>.

Select **Done** to return to the Home page.

Report Inspections from a Query

Note: The Report Inspections button is only displayed in query results to users authorized in SSO to report inspections. For additional information about queries, see <u>Query Notices</u>.

To report inspections from a query:

1. Select **Query Notices** on the main menu.

Exhibit 31. Query Notices Menu Item



- 2. Select **Equipment View**.
- 3. Select the Notice Type (MA, EW, or Both).
- 4. Complete one of the following:
 - a. Enter Notice Numbers. Use the search icon to view a multiple selection pick list (<u>Exhibit</u> <u>35</u>).
 - b. Enter known Equipment IDs. A paste from a spreadsheet can also be done.
- 5. Unless the results might be greater than 1000, leave the Output set to Browser. A sample query is shown in Exhibit 50.
- 6. Select **Search**. The Query Results are shown in Equipment View (similar to Exhibit 52).
- 7. Select the rows with the equipment ID. Select the equipment ID rows desired. Use the **Ctrl** key while selecting nonadjacent rows, or use the Shift key to select a block of IDs.

Exhibit 32. Equipment View table



8. Select **Report Inspections**.

Note: When the inspections have been successfully submitted, select **Done** to return to the Query Results page—not the Welcome page. If no other results exist, select **Done** to return to the Welcome Page (Exhibit 4).

Query Notices Basic Query

Query Notices

Early Warning has a query function that enables you to search for notices and equipment using:

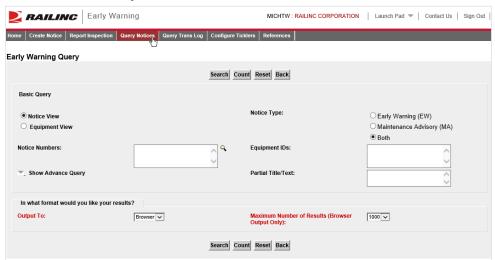
- <u>Basic Query</u>—in Notice or Equipment View
- Advanced Query—in Notice or Equipment View

Note: Tasks available from the query results panels vary depending on your permissions.

Basic Query

When you select **Query Notices**, the Early Warning Query panel is displayed for a basic query (Exhibit 33).

Exhibit 33. Basic Query with defaults



Fields for the Basic Query are shown in Exhibit 34:

Exhibit 34. Basic Query Fields

| View (toggle) | Notice View—Results are shown by notice, and the notice details can be viewed | | |
|--------------------|---|--|--|
| | (default). | | |
| | Equipment View —Results are shown by Equipment ID. When selecting this option, | | |
| | you <i>must</i> specify at least one Notice number or Equipment ID. Actions can then be | | |
| | performed against selected pieces of equipment. | | |
| Notice Type | Select Early Warning (EW) to only view EWs, Maintenance Advisory to only view | | |
| | MAs, or Both (default). | | |
| Notice Numbers | Enter known notice numbers separated by a space. Use the search icon to view a | | |
| | multiple selection pick list (Exhibit 35). | | |
| Equipment IDs | Enter known Equipment IDs separated by commas or a space. Ranges are supported | | |
| | (e.g., RAIL301-RAIL305). End wildcard (*) is also supported (RAIL00000003*). | | |
| Partial Title/Text | Enter a string of text that is part of the title or text within notices. | | |
| Output | Browser (up to 1000) is <i>default</i> . CSV (commas separated values) for results over | | |
| | 1,000 (see <u>CSV Download</u> for more information). | | |

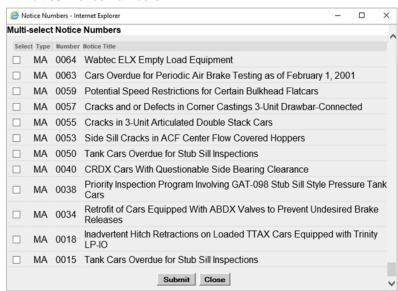
Continue with Equipment Query on page 33.

Query Notices

This section shows a basic default query of notices. To query notices:

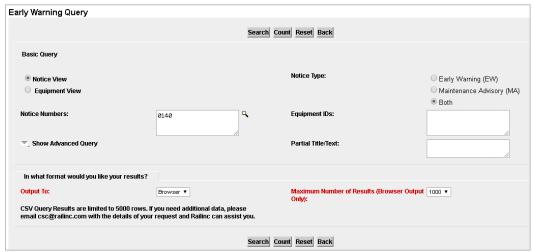
- 1. Select **Query Notices** on the main menu.
- 2. Use the default **Notice View**.
- 3. Select **Both** for **Notice Types**.
- 4. Type in a known **Notice Number**. Or use the Search icon to view a multiple selection pick list of available numbers (Exhibit 35).

Exhibit 35. Notice Numbers



5. Leave the Output set to Browser. A sample query is shown in Exhibit 36.

Exhibit 36. Basic Query with Notice View with Notice number entry



6. Choose a processing option (Exhibit 37).

Exhibit 37. Query Processing Options

| Search | Executes the search. |
|--------|---|
| Count | Counts the number of records a search would produce. This is a good choice if |
| | the numbers might exceed 1000 and require a CSV download instead. See |
| | Exhibit 41 and Exhibit 53. |
| Reset | Resets the Search panel to its defaults. |
| Back | Returns you to the Welcome page without processing |

Results are displayed in the Query Results panel (<u>Exhibit 38</u>). When **Count** is selected, a message is displayed at the top of the Early Warning panel (<u>Exhibit 41</u>).

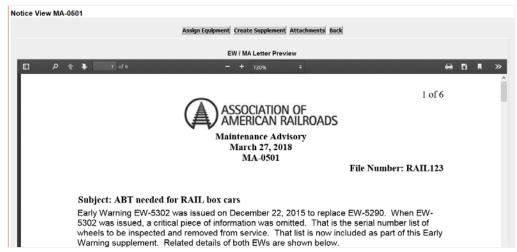
Exhibit 38. Query Notices Result



Actions allowed on this page include:

- a. Select the **Search Criteria** tab at the top to return to the Early Warning Query page (Exhibit 36).
- b. Sort the data by selecting the appropriate column heading link.
- c. View the Notice details by selecting the **Notice** # link. The Notice View <MA or EW-####> panel is displayed (Exhibit 39).

Exhibit 39. Notice View <MA or EW-####> - Top Section



7. Select a **Notice View** processing option (Exhibit 40):

Exhibit 40. Notice View Processing Options

| Assign | Opens the Assign Equipment panel. See <u>Assign Equipment after Submitting</u> |
|----------------|--|
| Equipment | for more information. Note: You must be authorized to add equipment. |
| Create | Opens the Create Supplement Notice panel (Exhibit 21) to adjust the notice |
| Supplement | content creating a supplement to the notice. See Create a Supplement for more |
| | information. |
| Attachments | Opens the Attachments window so you can view existing, attach new, or |
| | remove unneeded files for the notice. See <u>Attachments</u> for more information. |
| Download a PDF | |
| | Depending on the browser used, clicking on this save or download icon starts |
| | the download process to save the PDF to your local computer (Internet |
| | Explorer, Firefox and Chrome pictured respectively). See <u>Download a PDF</u> . |
| Back | Returns you to the Query Notices Result table (Exhibit 38). |

Count Results

Count results for Notice View are generally quite low, as seen in (<u>Exhibit 41</u>). Equipment counts are higher (see <u>Exhibit 53</u>).

Exhibit 41. Count Results for Notice View



Attachments

You can add or remove attachments from the **Create Supplement** page without having to issue a Supplement. When you select **Attachments** on the Create Supplement page, an Attachments panel opens (Exhibit 42). This page enables you to:

- Add Attachments
- View Attachments
- Remove Attachments

Exhibit 42. Attachments



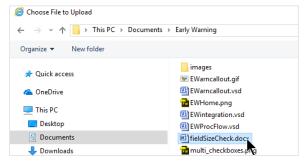
Adding Attachments

Attachments up to 1 MB can be uploaded to the Early Warning system. Accepted file formats include DOC, PDF, JPG, PNG, BMP, XLS, CSV, and TXT. To attach a file:

1. While in Notice View, select Attachments.

2. On the Attachments panel (<u>Exhibit 42</u>), select **Browse**. The Select file to upload panel is displayed (Exhibit 43).

Exhibit 43. Select a file to upload



3. Locate the file and select **Open**. The Attachment panel shows the selected file (Exhibit 43).

Exhibit 44. Attachments - selected file to attach



- 4. Write a comment to explain the attached file. This is optional.
- 5. Select **Attach**. The page is redisplayed with a success message and shows the newly attached file (Exhibit 45).

Exhibit 45. Attachments with success message and attached file



Each attached file has attachment information (file name, size, User ID, date, and entered comments). The file name is a link used to view the attachment. The **Remove** link at the end of the row is used to delete the attachment.

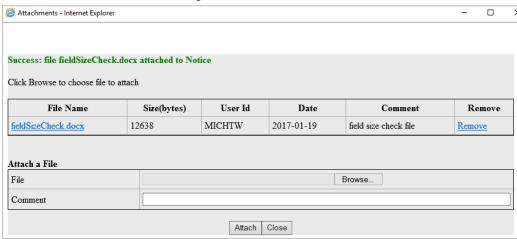
6. Select **Close** or **X** to close the panel.

Viewing Attachments

Choose the appropriate application to view attachments.

1. While in Notice View, select **Attachments**. If attachments exist, the Attachments panel shows attached files in the table (Exhibit 46).

Exhibit 46. Attachments with a single file attached



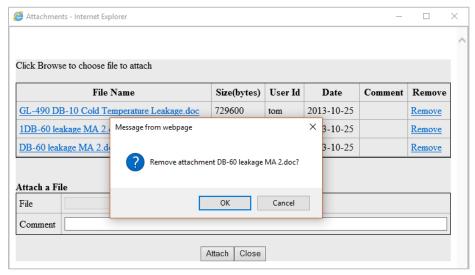
- 2. Select the **File Name** link to view the attachment. You can choose to **Open** or **Save** the attachment (similar to Exhibit 54).
 - a. When **Open** is selected, the attachment launches the appropriate application to view the file.
 - b. When **Save** is selected, you can save the downloaded file to a specified local directory.
- 3. When finished viewing or saving the attached file, select **Close** or **X** to close the Attachments panel.

Removing Attachments

Attachments that are no longer needed, or added accidently, can be removed.

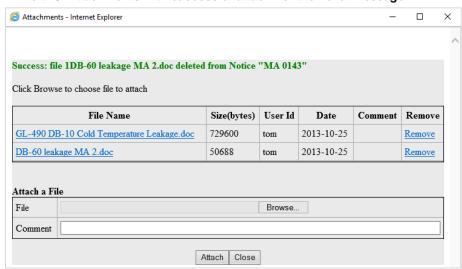
- 1. While in Notice View, select **Attachments**. If attachments exist, the Attachments panel shows attached files in the table (Exhibit 46).
- 2. Select the **Remove** link at the far right. A confirmation panel is displayed (Exhibit 47).

Exhibit 47. Confirm Attachment Removal



3. If unsure about the removal, select **Cancel**. Otherwise, select **Ok**. The Attachments panel is redisplayed with a successful removal message (<u>Exhibit 48</u>).

Exhibit 48. Attachments with successful attachment removal message



4. Select **Close** or **X** to close the panel.

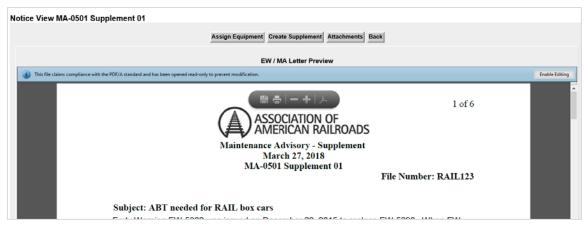
Download a PDF

When in **Notice View**, you can choose to download and save the PDF to your local computer by clicking the download icon. The icon shown depends on the browser that is used:



See Exhibit 49 for the Internet Explorer example. The printer icon, which appears next to the save icon, enables you to print the PDF.

Exhibit 49. Save or Print a PDF



Using the copy/paste function in the PDF, you can copy the equipment list from the bottom of the PDF to paste into Early Warning or other applications and documents.

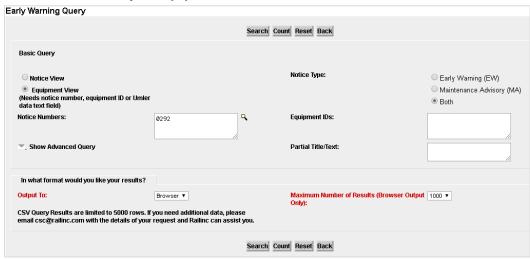
When finished viewing, printing, or saving the PDF, close the window by clicking the X in the top right corner.

Equipment Query

Equipment queries show the equipment assigned to MAs and EWs, or from directly entered Equipment IDs. To do an equipment query:

- 1. Select **Query Notices** on the main menu.
- 2. Select **Equipment View**.
- 3. Select the **Notice Type** (MA, EW, or Both).
- 4. Complete one of the following:
 - a. Enter Notice Numbers. Use the Search icon to view a multiple selection pick list (<u>Exhibit</u> <u>35</u>).
 - b. Enter known **Equipment IDs**. A paste from a spreadsheet can also be done.
- 5. Unless the results might be greater than 1000, leave the **Output** set to **Browser**. A sample query is shown in Exhibit 50.

Exhibit 50. Basic Query for Equipment View



In this example, one Notice number has been entered.

6. Choose a processing option (Exhibit 51).

Exhibit 51. Query Processing Options

| Search | Executes the search. |
|--------|---|
| Count | Counts the number of records a search would produce. This is a good choice |
| | when there is a possibility the numbers might exceed 1000 and require a CSV |
| | download instead. See Exhibit 41 and Exhibit 53. |
| Reset | Resets the Search panel to its defaults. |
| Back | Returns you to the Welcome page without processing. |

7. In this example, select **Search**.

Results are displayed in the **Equipment View** panel is displayed (<u>Exhibit 52</u>). If **Count** had been selected, a message is displayed at the top of the Early Warning panel (<u>Exhibit 53</u>).

Exhibit 52. Equipment View



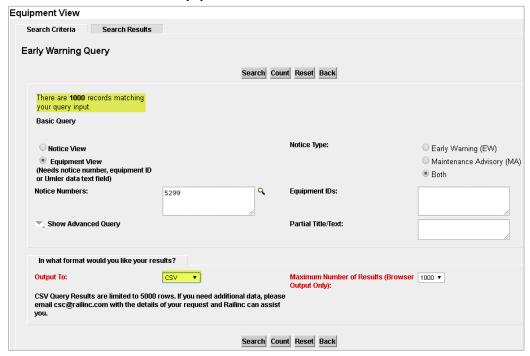
Actions allowed on this page include:

- a. Select **Back** to return to the Early Warning Query page (Exhibit 36).
- b. Sort the data by selecting the appropriate column heading link.
- c. Report Inspections for listed equipment (authorized users only):
 - Select the equipment ID rows desired. Use the **Ctrl** key while selecting nonadjacent rows, or use the Shift key to select a "block" of IDs.
 - Select **Report Inspections**. See <u>Report Inspection</u> for instructions.

Count Results

Count results for Equipment View can be quite large, as seen in (<u>Exhibit 53</u>). When results for any query number over 1000 records, a CSV download is required for **Output**. See <u>CSV</u> <u>Download</u> for more information.

Exhibit 53. Count Results for Equipment View



CSV Download

When results for a Count are over 1000 records, you must download the results to see the details. Execute the query and select **CSV** for Output. Then select **Search**. The File Download panel is displayed (Exhibit 54).

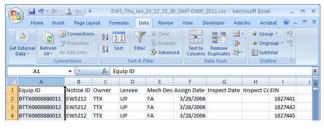
Exhibit 54. File Download



If you select **Open**, the file downloads to a temporary directory and then opens in the local spreadsheet application (e.g., Excel) for immediate viewing. Select **Save** to save the downloaded file to a specified local directory. **Save** is recommended for files with large counts.

Note: When a spreadsheet is opened directly, you must intentionally save the output file while in the spreadsheet before exiting.

Exhibit 55. CSV file opened in Excel



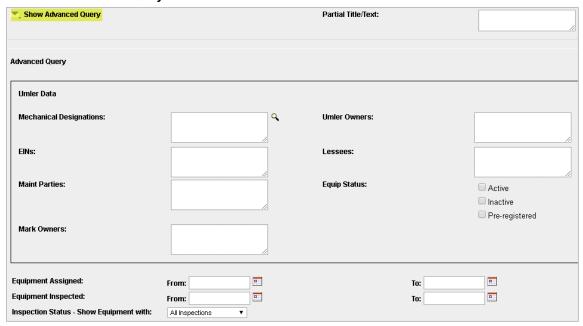
Query Notices Advanced Query

Advanced Query

An advanced query can be used to incorporate some of the search criteria used in Umler to find specific notices. Processing occurs as described in the Basic queries section. The additional criteria can help restrict equipment lists for further processing.

When you click the **Show Advanced Query** icon , additional fields are displayed (<u>Exhibit</u> 56). Click on it again to hide these additional fields.

Exhibit 56. Advanced Query Fields



• The **Umler Data** fields are described in the **Umler User Guide**.

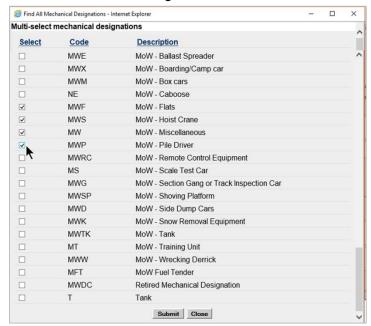
These include:

- Mechanical Designations
- EINs
- Maint Parties (Maintenance Parties)
- Mark Owners (Stenciled Mark Owner)
- Umler Owners
- Lessees
- Equip Status (Equipment Status)—Active, Inactive, Pre-Registered

The Mechanical Designations field has a search icon $^{\circ}$. Click on it to open a list of available designations (Exhibit 57). Select those that apply by clicking inside the checkboxes. Use the **Ctrl** key while selecting nonadjacent IDs, or use the **Shift** key to select a "block" of IDs. Select **Submit** to add the selected designations to the field.

Query Notices Advanced Query

Exhibit 57. Mechanical Designations



- Equipment Assigned Enter From: and To: dates or use the calendar icons to select a range of dates the equipment was added/assigned to the notice.
- Equipment Inspected Enter From: and To: dates or use the calendar icons to select a range of dates when the equipment was inspected.
- The **Inspection Status** can be set using the drop-down. Valid values are:

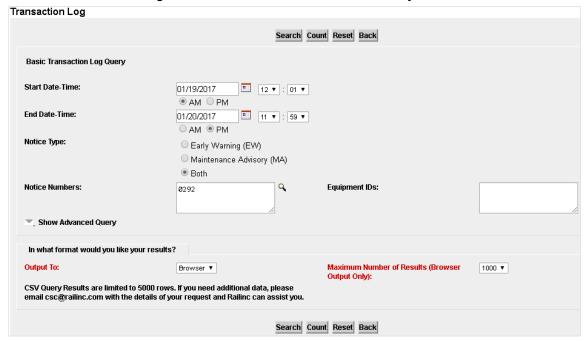


Query Trans Log

The Query Trans Log function is used to view the transaction log of activity over a specified period of time. It can also be used by authorized users to back out incorrectly reported inspections or to see what had changed for a notice supplement. To view a transaction log:

1. Select **Query Trans Log**. The Transaction Log page is displayed (Exhibit 58).

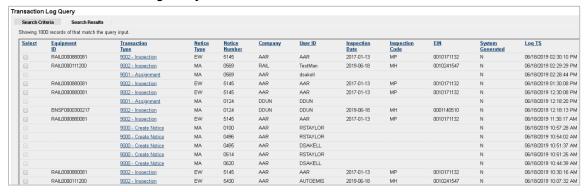
Exhibit 58. Transaction Log with default times and Notice Number entry



2. Enter criteria:

- a. Default time period is one week from the current date/time. Change as appropriate.
- b. Select the Notice Type (MA, EW, or both, the default).
- c. (Optional) Enter Notice numbers. Use the Search icon to view a multiple selection pick list (Exhibit 35).
- d. (Optional) Enter known Equipment IDs. A paste from a spreadsheet can also be done.
- e. (Optional) Enter Advanced criteria. Select the Show Advanced Query. Only Umler Data can be specified (see <u>Exhibit 56</u>).
- 3. When criteria are set, select **Search**. The Transaction Log Query page displays a list of records matching the input (Exhibit 59).

Exhibit 59. Transaction Log Query Results



Content can be sorted, selected, unselected, and details viewed. For selected records, inspections can be backed out *by users with SSO Report Inspections permission*.

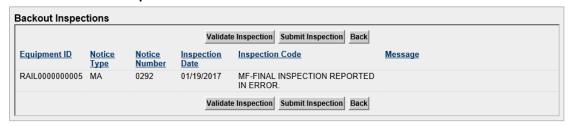
Back Out Inspection

Exhibit 60. Transaction Log Query with selected record for Inspection Backout



4. To back out an inspection, select the record, and then select **Backout Inspections**. The Backout Inspections panel is displayed (<u>Exhibit 61</u>).

Exhibit 61. Backout Inspections



5. Select **Submit Inspection** to finalize the back out. The Inspection Backout Confirmation is displayed with the latest recorded events (Exhibit 62).

Exhibit 62. Transaction Log Query after Inspection Backout



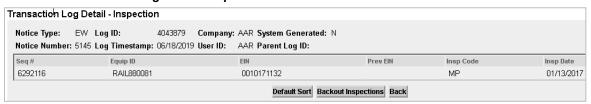
6. Click **Done** to return to the **Transaction Log Query**.

View Transaction Log Query Details

Transaction Log Query details can be used to determine exactly what had changed in a supplement. To view Transaction Log Query details:

- 1. Select Search on a Transaction Log Query as described previously in Exhibit 58.
- 2. From the Transaction Log Search Results (Exhibit 59), click a link in Transaction Type column to select a record. The Transaction Log Detail Notice or Transaction Log Detail Inspection page is displayed.

Exhibit 63. Transaction Log Detail - Inspection



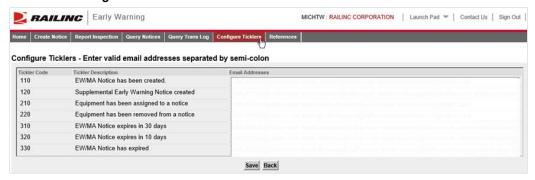
3. Select **Back** to return to the **Transaction Log Query** results.

Configure Ticklers

The Configure Ticklers function is used to view a list of notification configurations used by Early Warning. To set up users to receive tickler emails:

1. Select **Configure Ticklers**. The Configure Ticklers page is displayed (Exhibit 64).

Exhibit 64. Configure Ticklers



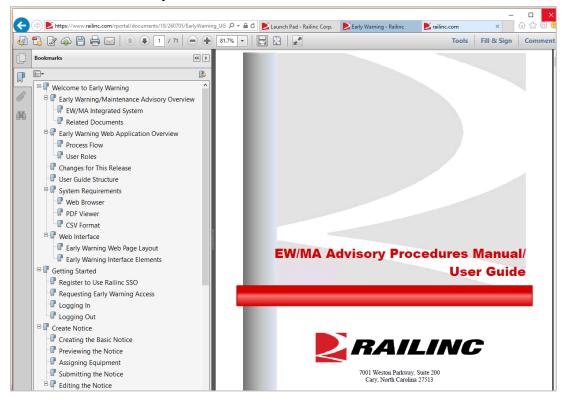
Notifications for these events are sent via email to the recipients shown at the right. All users with access to configure ticklers can modify the Email Addresses field.

- 2. To edit the Email Addresses field:
 - a. Select the field.
 - b. Overtype the data, add, or remove email addresses. Addresses must be separated by semicolons.
- 3. Select **Save**. A confirmation message is displayed.

References

When you select **References** on the main menu, the EW/MA Advisory Procedures Manual/User Guide opens in a new window (Exhibit 65).

Exhibit 65. EW/MA Advisory Procedures Manual/User Guide



The EW/MA Advisory Procedures Manual/User Guide PDF has step-by-step instructions for using Early Warning. To exit, close the document window by clicking the **X** in the top right corner.

Glossary

| Term | Description |
|----------------------|--|
| AAR | American Association of Railroads |
| Car Hire | Car Hire is a usage charge paid to car owners by railroads for the use |
| | of freight cars and appurtenances |
| Early Warning System | References the new web-based version of the Early Warning and |
| | Maintenance Advisory system. |
| EMIS/Umler | Equipment Management Information System (formerly the |
| | Universal Machine Language Equipment Register [UMLER]) |
| EW/MA Status | The code used to represent the current status of the EW/MA |
| | equipment. These codes are indicative of the severity and inspection |
| | codes currently used in the TC/TCC fields of the Umler master |
| | record. |
| EW | Early Warning letter. Eventually prohibits equipment from being |
| | allowed in interchange. |
| MA | Maintenance Advisory. Allows equipment to continue through |
| | interchanges until the needed maintenance is performed. |
| Mark | 2–4 character abbreviation for a railroad, shipper, lease agent, shop, |
| | etc. |
| Pool Assignment | The Umler transaction set used for assigning equipment to an |
| Transaction | equipment pool, as qualified by a pool header transaction. |
| | |
| Pool Header | The Umler transaction set used to establish an equipment pool, |
| Transaction | usually for a specific type of equipment or equipment utilization. |
| SCAC | Standard Carrier Alpha Code. Uniform alphabetic code for railroad |
| | identification. |
| SPLC | Standard Point Location Code |
| TC/TCC | Transportation Code/ Transportation Condition Code |
| | Alphabetic codes used in Umler master record indicating type of car |
| | loading and interchange restrictions, respectively. |
| | |
| Umler | Railinc's equipment asset system that serves as the industry's |
| | database for equipment management and inspection information. |
| Umler Administrator | The individuals within Railinc responsible for providing business |
| | support services for the Umler system. |

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