CACTUS (Conditionally Approved Comp Tracking System) User Guide

RAILINC

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Overview

The Conditionally Approved Component Tracking System (CACTUS) is designed to provide technical committees conditionally approving components with visibility into component allocations and applications. CACTUS provides an efficient process to enter, track, and manage components, while increasing visibility and ensuring accountability and measuring performance.

The purpose of this document is to provide step-by-step instructions for using CACTUS. Each system function is outlined with procedures and examples to guide you through the features to track and manage conditionally approved components.

System Requirements

For information about the system requirements of Railinc web applications and for information about downloading compatible web browsers and file viewers, refer to the *Railinc UI Dictionary*.

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

CACTUS is accessed using the Railinc Single Sign-On (SSO). SSO can be accessed from the Railinc portal at *Railinc Single Sign-On/Launch Pad User Guide*. The SSO login is located at the upper right of the page.

Register to Use Railinc SSO

Each CACTUS user must register to use Railinc Single Sign-On. Refer to the *Railinc Single Sign-On/Launch Pad User Guide* for more information.

Once SSO registration is complete, you must request access to CACTUS within SSO.

Role-Based Application

Access and authorization for CACTUS is determined when requesting access through Railinc Single Sign-On. Refer to Exhibit 2 for a complete list of CACTUS roles as seen in SSO.

Exhibit 1. User Roles and Descriptions

Role	Description
CACTUS AAR Generic Access	Provides members of the AAR with general read-only access to component data.
CACTUS WABL Committee Manager	Provides the WABL Committee Manager the ability to administer, add, modify, and manage conditionally approved WABL components and related data.
CACTUS CSTCC Committee Manager	Provides the CSTCC Committee Manager the ability to administer, add, modify, and manage conditionally approved CSTCC components and related data.
CACTUS WABL Generic Access	Provides the WABL Committee Members read-only access to conditionally approved WABL components and related data.
CACTUS CSTCC Generic Access	Provides the CSTCC Committee Members read-only access to conditionally approved CSTCC components and related data.
CACTUS Manufacturer	Provides manufacturers of conditionally approved components the ability to enter component CID numbers or railcar applications of non-CID components.

Requesting CACTUS Access

After authorization to use Railinc SSO is received, you must request general access to CACTUS following instructions in the *Railinc Single Sign-On/Launch Pad User Guide*.

Exhibit 2. CACTUS Request Permission

CACTUS
Conditionally Approved Component Tracking System

① Select Roles   ② Confirm   ③ Done

☐ CACTUS AAR Generic Access
CACTUS AAR Generic Access

☐ CACTUS CSTCC Committee Manager
CACTUS CSTCC Committee Manager

☐ CACTUS CSTCC Generic Access
CACTUS CSTCC Generic Access

☐ CACTUS Manufacturer
CACTUS Manufacturer

☐ CACTUS WABL Committee Manager
CACTUS WABL Committee Manager

☐ CACTUS WABL Generic Access
CACTUS WABL Generic Access
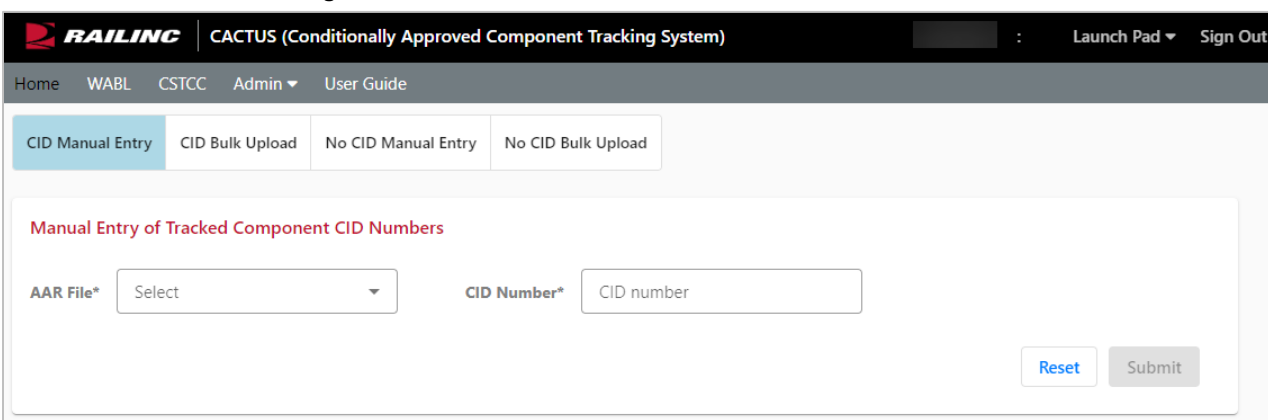
Comments...

0/255

Return   Next

Once you receive an email notification confirming your access to CACTUS, you can login and begin using CACTUS.

Logging In

Use the following procedure to log into CACTUS:

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.

4. In **My Applications**, select **CACTUS**. The CACTUS Home page is displayed (Exhibit 3). The menu functions will vary depending on your role.

Exhibit 3. CACTUS Home Page

5. Continue by selecting an application menu item.

Logging Out

To log out of CACTUS, select the **Sign Out** link. The Account Access page is displayed.

Home

From the Home page (Exhibit 3), manufacturers and shops can add conditionally approved components to CACTUS.

Some conditionally approved components have Component IDs (CIDs) These can be manually added, and bulk uploaded using:

- CID Manual Entry
- CID Bulk Upload

Some components do not have CIDs. These can also be manually added, and bulk uploaded using:

- No CID Manual Entry
- No CID Bulk Upload

CID Manual Entry

Users with the Manufacturer role can manually add conditionally approved CID numbers to CACTUS. To add CID numbers in bulk, see CID Bulk Upload.

Use the following procedure to manually enter conditionally approved components with an approved tracked CID number:

1. From the main menu, select **Home**. The **CID Manual Entry** tab opens by default.

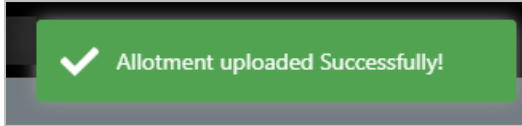2. Select the appropriate **AAR File** and enter the **CID Number**.

Exhibit 4. Manual Entry of Tracked CID Numbers

3. Select **Submit**.

4. A green success message displays when the CID number is successfully added.

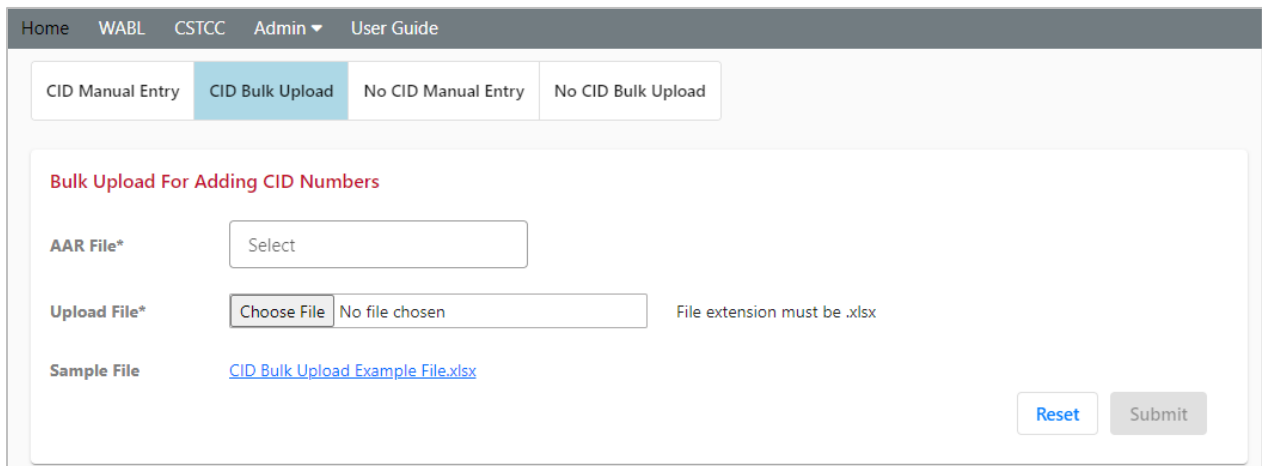*Exhibit 5. Success Message*

CID Bulk Upload

Users with the Manufacturer role can upload conditionally approved CID numbers to CACTUS in bulk.

Use the following procedure to upload multiple conditionally an approved tracked CID numbers:

1. From the main menu, select **Home** and select the **CID Bulk Upload** tab. The Bulk Upload for Adding CID Numbers tab is displayed.

Exhibit 6. CID Bulk Upload

2. Prepare your file for bulk upload by selecting the **Sample File** link to download the file. Add CID numbers to the file. Once your bulk upload file is ready, save it to your computer.

3. Select the appropriate **AAR File** and select **Choose File** and then select your saved file.

4. To submit your upload file to CACTUS, select **Submit**.

5. A green success message displays when the file is successfully uploaded (Exhibit 5).

No CID Manual Entry

Users with the Manufacturer role can manually enter conditionally approved components without CID numbers to CACTUS.

Use the following procedure to manually enter conditionally approved components that do not have an approved tracked CID number:

1. From the main menu, select **Home** and select the **No CID Manual Entry** tab. The No CID Manual Entry page is displayed.

Exhibit 7. No CID Manual Entry

2. All fields are required. Select the appropriate **AAR File** and enter the **Application Date** in MM/DD/YYYY format, enter the **Railcar Number** and select the **Location Applied**.

3. Select **Submit**.

4. A green success message displays when the component is successfully added ([Exhibit 5](#)).

No CID Bulk Upload

Users with the Manufacturer role can upload conditionally approved components without CID numbers in bulk to CACTUS.

Use the following procedure to manually enter conditionally approved components that do not have approved tracked CID numbers:

1. From the main menu, select **Home** and select the **No CID Bulk Upload** tab. The No CID Bulk Upload page is displayed.

Exhibit 8. No CID Bulk Upload

Home	WABL	CSTCC	Admin ▼	User Guide

| CID Manual Entry | CID Bulk Upload | No CID Manual Entry | No CID Bulk Upload |

Bulk Upload For Non CID

AAR File*	Select	
Upload File*	Choose File No file chosen	File extension must be .xlsx
Sample File	No CID Bulk Upload Example File.xlsx	

Reset Submit

2. Prepare your file for bulk upload by selecting the **Sample File** link to download the file. Enter component information to all named columns in the file. Once your bulk upload file is ready, save it to your computer.

3. Select the appropriate **AAR File** and select **Choose File** and then select your saved file.

4. To submit your upload file to CACTUS, select **Submit**.

5. A green success message displays when the file is successfully uploaded (Exhibit 5).

WABL

The WABL menu item contains functions only available for WABL (Wheels, Axles, Bearings and Lubrication) Committee members.

WABL Overview

The WABL Overview page is read-only and is available to all WABL committee members with access to CACTUS.

Use the following procedure to view WABL component entries:

1. From the CACTUS menu, select **WABL**. The **Overview** tab opens by default. This page is a list of WABL component entries. Use the scroll bar on the right to scroll through the list.

2. Select the plus (+) sign next to the AAR File name to expand and view details. Select the minus (-) to hide the details.

Exhibit 9. WABL Overview

3. When expanded, the Railcar Applications column shows a graphic that depicts the percentage of how much the allotment has been applied. Once the first allotment reaches 100%, if there are additional allotments, the next allotment will begin.

4. Select the **Manage Milestones and Notifications** button to view the milestone(s) applicable to the component (Exhibit 10). Make one or more entries below and select **Submit**:

    a. Select the **Enable** toggle to enable and disable the milestone.

    b. Select the **Email** toggle to enable and disable the email notification. An email notification will be sent to the committee manager for the component every time one of the railcars reaches this milestone.

    c. Enter an Equipment Advisory notice number in the **Notice No.** field. This can be left blank until the Equipment Advisory is known. You can return later to add the notice number.

Exhibit 10. WABL Manage Milestones and Notifications

New WABL Component Entry

Only assigned WABL Committee Managers have access to enter new WABL components into CACTUS.

Use the following procedure to add a new WABL component:

1. From the CACTUS menu, select **WABL** and select the **New WABL Component Entry** tab. The New WABL Component Entry tab is displayed.

Exhibit 11. New WABL Component Entry

2. All fields are required. Select the **Component Type**, enter the **AAR File**, select the **Manufacturer,** and enter the **Allotment Quantity** and **Allotment Date**. Allotment Date can be a date in the past.

3. Select **Submit**.

4. A green success message displays when the component is successfully added (Exhibit 5).

Add Additional Allotment to WABL Components

Only assigned WABL Committee Managers have access to add additional allotment to existing WABL components in CACTUS.

Use the following procedure to view allotment history and add additional allotment to a WABL component:

1. From the CACTUS menu, select **WABL** and select the **Add Additional Allotment** tab. The Add Additional Allotment tab is displayed.

2. Enter the name of the **AAR File**. When applicable, the allotment history for the entered file appears in the Allotment History table below.

Exhibit 12. Add Additional Allotment to WABL Components

3. The **Component Type** automatically populates. Enter the **Additional Allotment Quantity**. The amount entered will be added to the other allotments listed for that file and component type. Enter the **Allotment Date**. Allotment Date can be a date in the past. **Notes** are optional.

4. Select **Submit**.

5. A green success message displays when the additional allotment is successfully added (Exhibit 5).

CSTCC

The CSTCC menu item contains functions only available for CSTCC (Coupling System and Truck Castings Committee) members.

CSTCC Overview

The CSTCC Overview page is read-only and is available to all CSTCC committee members with access to CACTUS.

Use the following procedure to view CSTCC component entries:

1. From the CACTUS menu, select **CSTCC**. The **Overview** tab opens by default. This page is a list of CSTCC component entries. Use the scroll bar on the right to scroll through the list.

2. Select the plus (**+**) sign next to the AAR File name to expand and view details. Select the minus (**-**) to hide the details.

Exhibit 13. CSTCC Overview

3. When expanded, the Railcar Applications column shows a graphic that depicts the percentage of how much the allotment has been applied. Once the first allotment reaches 100%, if there are additional allotments, the next allotment will begin.

4. Select the **Manage Milestones and Notifications** button to view the milestone(s) applicable to the component ([Exhibit 14](#)). Make one or more entries below and select **Submit**:

    a. Select the **Enable** toggle to enable and disable the milestone.

    b. Select the **Email** toggle to enable and disable the email notification. An email notification will be sent to the committee manager for the component every time one of the railcars reaches this milestone.

    c. Enter an Equipment Advisory notice number in the **Notice No.** field. This can be left blank until the Equipment Advisory is known. You can return later to add the notice number.

Exhibit 14. CSTCC Manage Milestones and Notifications

New CSTCC Component Entry

Only assigned CSTCC Committee Managers have access to enter new CSTCC components into CACTUS.

Use the following procedure to add a new CSTCC component:

1. From the CACTUS menu, select **CSTCC** and select the **New CSTCC Component Entry** tab. The New CSTCC Component Entry tab is displayed.

Exhibit 15. New CSTCC Component Entry

2. All fields are required. Select the **Component Type**, enter the **AAR File**, select the **Manufacturer**, and enter the **Catalog Number**, **Allotment Quantity** and **Allotment Date**. Allotment Date can be a date in the past.

3. Select **Submit**.

4. A green success message displays when the component is successfully added (Exhibit 5).

Add Additional Allotment to CSTCC Components

Only assigned CSTCC Committee Managers have access to add additional allotment to existing CSTCC components in CACTUS.

Use the following procedure to view allotment history and add additional allotment to a CSTCC component:

1. From the CACTUS menu, select **CSTCC** and select the **Add Additional Allotment** tab. The Add Additional Allotment tab is displayed.

2. Enter the name of the **AAR File**. When applicable, the allotment history for the entered file appears in the Allotment History table below.

Exhibit 16. Add Additional Allotment to CSTCC Components

3. The **Component Type** automatically populates. Enter the **Additional Allotment Quantity**. The amount entered will be added to the other allotments listed for that file and component type. Enter the **Allotment Date**. The Allotment Date can be a date in the past. **Notes** are optional.

4. Select **Submit**.

5. A green success message displays when the additional allotment is successfully added ([Exhibit 5](#)).

Admin

Exhibit 17. Admin Menu
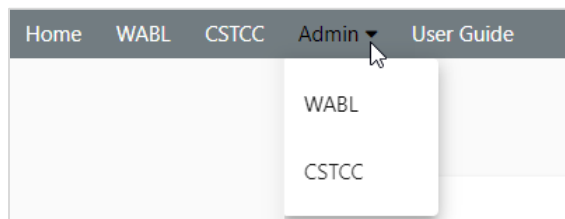
For WABL and CSTCC Committee members, the Admin menu item is available with a menu item for their respective committee for the following purposes:

- WABL: WABL Committee Managers can add new components, manufacturers, certificates, AAR types and classes to be used in the New WABL Component Entry and Add Additional Allotment to WABL Components forms.

- CSTCC: CSTCC Committee Managers can add new components and manufacturers to be used in the New CSTCC Component Entry and Add Additional Allotment to CSTCC Components forms.

WABL Admin

WABL Admin functions include:

- WABL Components
- WABL Manufacturers
- WABL Certificate
- WABL AAR Type
- WABL Class
- WABL AAR File

WABL Components

Only assigned WABL Committee Managers have access to enter new component types for WABL into CACTUS.

Use the following procedure to add a new component type:

1. From the CACTUS menu, select **Admin** > **WABL**. The **Components** tab opens by default. The Add New Component page is displayed.

Exhibit 18. WABL Components

2. At the bottom is a list of all existing WABL component types in CACTUS.

3. Both fields are required. Enter a new component type in the **Component Name** field and enter a **Component Description**.

4. Select **Submit**.

5. A green success message displays when the component type is successfully created similar to [Exhibit 5](#).

WABL Manufacturers

Only assigned WABL Committee Managers have access to enter manufacturers for WABL into CACTUS.

Use the following procedure to add a manufacturer:

1. From the CACTUS menu, select **Admin** > **WABL** and select the **Manufacturers** tab. The Add New Manufacturer tab is displayed.

Exhibit 19. WABL Manufacturers

Add New Manufacturer

Enter New Manufacturer* | Manufacturer Name |

Reset   Submit

List of Manufacturers

Amsted Rail

McConway & Torley

Wabtec – Workhorse Rail

Wabtec – Standard Car Truck

NYAB

Strato

2. At the bottom is a list of all existing WABL manufacturers in CACTUS.

3. Enter a manufacturer name in the **Manufacturer Name** field.

4. Select **Submit**.

5. A green success message displays when the manufacturer is successfully created similar to Exhibit 5.
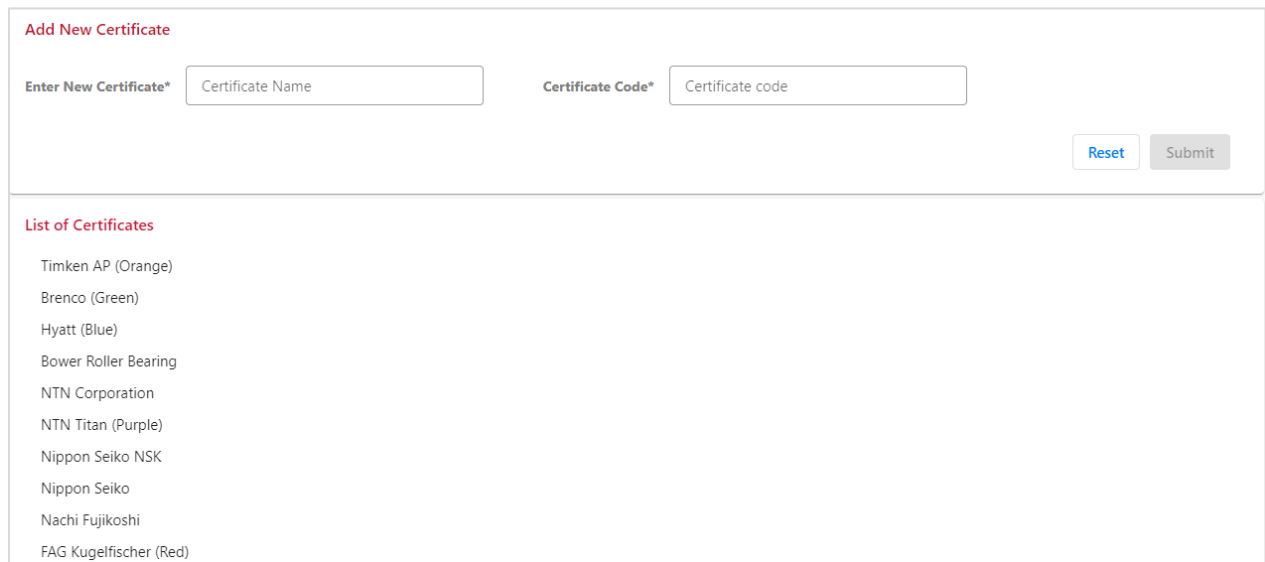
WABL Certificate

Only assigned WABL Committee Managers have access to enter new certificates for WABL into CACTUS.

Use the following procedure to add a new certificate:

1. From the CACTUS menu, select **Admin** > **WABL** and select the **Certificate** tab. The Add New Certificate tab is displayed.

Exhibit 20. WABL Certificate

2. At the bottom is a list of all existing WABL certificates in CACTUS.
3. Both fields are required. Enter the **Certificate Name** and the **Certificate Code**.
4. Select **Submit**.
5. A green success message displays when the certificate is successfully created similar to Exhibit 5.

WABL AAR Type

Only assigned WABL Committee Managers have access to enter new AAR types for WABL into CACTUS.

Use the following procedure to add a new AAR type:

1. From the CACTUS menu, select **Admin** > **WABL** and select the **AAR Type** tab. The Add New AAR Type tab is displayed.

Exhibit 21. WABL AAR Type

2. At the bottom is a list of all existing WABL AAR types in CACTUS.
3. Both fields are required. Enter the **AAR Type Name** and the **AAR Type Code**.
4. Select **Submit**.
5. A green success message displays when the AAR type is successfully created similar to Exhibit 5.

WABL Class

Only assigned WABL Committee Managers have access to enter new classes for WABL into CACTUS.

Use the following procedure to add a new class:

1. From the CACTUS menu, select **Admin** > **WABL** and select the **Class** tab. The Add New Class page is displayed.

Exhibit 22. WABL Class

2. At the bottom is a list of all existing WABL classes in CACTUS.

3. Both fields are required. Enter the **Class Name** and the **Class Code**.

4. Select **Submit**.

5. A green success message displays when the class is successfully created similar to Exhibit 5.
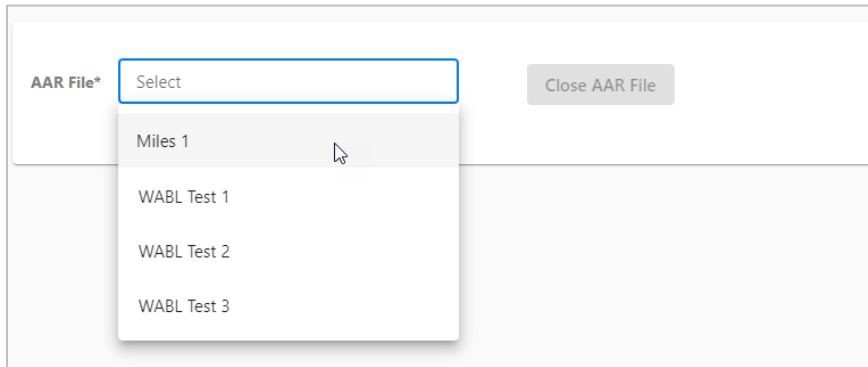
WABL AAR File

Only assigned WABL Committee Managers have access to close and remove WABL AAR Files from CACTUS. Once a component is fully approved and is no longer in the conditionally approved status, you can close the AAR File. Closing the file removes it from the CACTUS system.

Use the following procedure to close and remove AAR Files:

1. From the CACTUS menu, select **Admin** > **WABL** and select the **AAR File** tab. The AAR File tab is displayed.
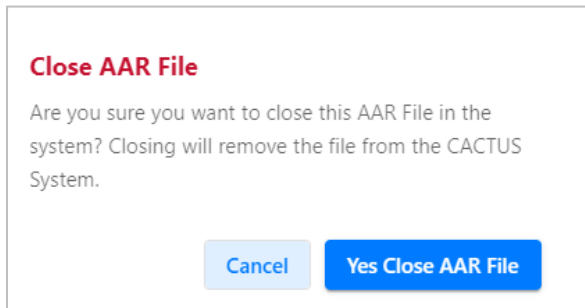
Exhibit 23. WABL AAR File

2. Enter or select the file that you want to close from the **AAR File** field.

3. Select **Close AAR File**.

4. A confirmation message displays to confirm you want to close the file (Exhibit 24). Selecting **Yes Close AAR File** closes the file and removes it from the system.

5. A green success message displays when the AAR File is successfully closed.

Exhibit 24. Close AAR File Confirmation

CSTCC Admin

CSTCC Admin functions include:

- [CSTCC Components](#)
- [CSTCC Manufacturers](#)
- [CSTCC AAR File](#)

CSTCC Components

Only assigned CSTCC Committee Managers have access to enter new component types for CSTCC into CACTUS.

Use the following procedure to add a new component type:

1. From the CACTUS menu, select **Admin** > **CSTCC**. The **Components** tab opens by default. The Add New Component page is displayed.

Exhibit 25. CSTCC Components

2. At the bottom is a list of all existing CSTCC component types in CACTUS.

3. Both fields are required. Enter a new component type in the **Component Name** field and enter a **Component Description**.

4. Select **Submit**.

5. A green success message displays when the component type is successfully created similar to [Exhibit 5](#).

CSTCC Manufacturers

Only assigned CSTCC Committee Managers have access to enter manufacturers for CSTCC into CACTUS.

Use the following procedure to add a manufacturer:

1. From the CACTUS menu, select **Admin** > **CSTCC** and select the **Manufacturers** tab. The Add New Manufacturer page is displayed.

Exhibit 26. CSTCC Manufacturers

Add New Manufacturer

Enter New Manufacturer*   [Manufacturer Name]

                                        Reset   Submit

List of Manufacturers

Amsted Rail
McConway & Torley
Wabtec – Workhorse Rail
Wabtec – Standard Car Truck
NYAB
A.Stucki
Strato
Pennsy
Miner
Cansun

2. At the bottom is a list of all existing CSTCC manufacturers in CACTUS.

3. Enter a manufacturer name in the **Manufacturer Name** field.

4. Select **Submit**.

5. A green success message displays when the manufacturer is successfully created similar to Exhibit 5.
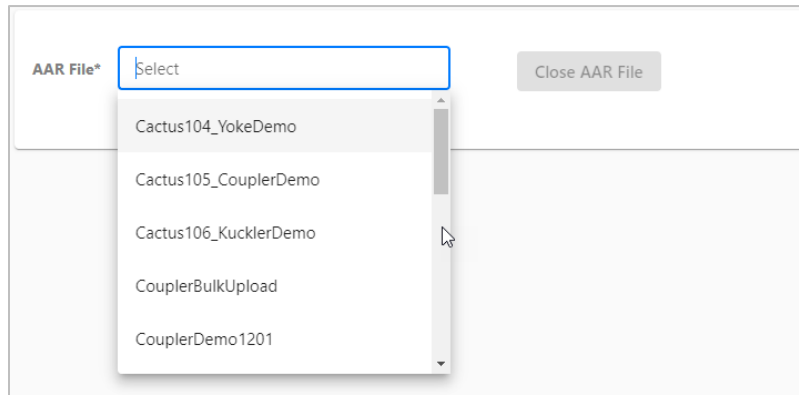
CSTCC AAR File

Only assigned CSTCC Committee Managers have access to close and remove CSTCC AAR Files from CACTUS. Once a component is fully approved and is no longer in the conditionally approved status, you can close the AAR File. <u>Closing the file removes it from the CACTUS system.</u>

Use the following procedure to close and remove AAR Files:

1. From the CACTUS menu, select **Admin** > **CSTCC** and select the **AAR File** tab. The AAR File tab is displayed.

Exhibit 27. CSTCC AAR File

2. Enter or select the file that you want to close from the **AAR File** field.

3. Select **Close AAR File**.

4. A confirmation message displays to confirm you want to close the file ([Exhibit 24]). Selecting **Yes Close AAR File** closes the file and removes it from the system.

5. A green success message displays when the AAR File is successfully closed.