



PTC ILM Getting Started Guide



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Table of Contents

| | |
|---|-----------|
| Learning about PTC ILM | 1 |
| System Requirements..... | 1 |
| Supported Organization Relationship Types..... | 2 |
| Accessing the Railinc Customer Success Center | 2 |
| Getting Started with PTC ILM..... | 3 |
| Registering to Use Railinc SSO | 3 |
| Requesting PTC ILM Access..... | 3 |
| Registering to Use FindUs.Rail..... | 4 |
| Logging In..... | 6 |
| Viewing the ILM Application Suite..... | 7 |
| Working with Tasks..... | 10 |
| Using the Advanced Search Panel | 11 |
| Sorting and Filtering Search Results..... | 13 |
| Exporting Search Results | 14 |
| Managing Tasks Assigned to Your Company..... | 15 |
| Viewing Task Details..... | 17 |
| Copying Task Details | 22 |
| Editing Task Details | 23 |
| Viewing the Task Activity Log | 24 |
| Cancelling Tasks..... | 24 |
| Managing Tasks Assigned by Your Company..... | 25 |
| Creating Tasks..... | 26 |
| Working with the System Activity Logs..... | 31 |
| Searching for Specific Information..... | 32 |
| Exporting Search Results | 33 |
| Working with Reports | 34 |
| Using the ILM Reports..... | 34 |
| Creating Custom Reports | 37 |
| Creating a Custom PISR Report | 37 |
| Creating a Custom ICAB Attendees Report | 38 |

List of Exhibits

| | |
|---|----|
| Exhibit 1. FindUs.Rail Add Contact Categories Section | 5 |
| Exhibit 2. Account Access Panel | 6 |
| Exhibit 3. Launch Pad with PTC ILM as an Authorized Application..... | 6 |
| Exhibit 4. ILM Application Suite Page | 7 |
| Exhibit 5. Example Application Module Within the ILM Framework | 8 |
| Exhibit 6. Tasks Dashboard | 10 |
| Exhibit 7. Advanced Search Panel | 11 |
| Exhibit 8. Tasks Dashboard with the Search Results Tab..... | 13 |
| Exhibit 9. Tasks Dashboard with the Search Results | 13 |
| Exhibit 10. Tasks Dashboard with a Column Filter Entered..... | 14 |
| Exhibit 11. Tasks Dashboard Filtered for Exporting Data | 15 |
| Exhibit 12. Exported Tasks in a Spreadsheet..... | 15 |
| Exhibit 13. Tasks Dashboard Showing the Assigned To My Company Tab | 16 |
| Exhibit 14. Tasks Details | 17 |
| Exhibit 15. Comments Popup..... | 19 |
| Exhibit 16. Task Status Popup | 20 |
| Exhibit 17. Completion Status Popup | 20 |
| Exhibit 18. Success Message | 20 |
| Exhibit 19. Copy Task Details | 22 |
| Exhibit 20. Edit Task Details Page..... | 23 |
| Exhibit 21. Task Activity Logs Information Popup | 24 |
| Exhibit 22. Cancel Tasks Popup | 24 |
| Exhibit 23. Tasks Dashboard Showing the Assigned By My Company Tab..... | 25 |
| Exhibit 24. Change Management Dashboard..... | 26 |
| Exhibit 25. Change Management View ICR General Information Tab | 26 |
| Exhibit 26. Change Management Create Task(s) Popup..... | 27 |
| Exhibit 27. Railroad Selector Popup..... | 28 |
| Exhibit 28. Completed Create Task(s) Popup..... | 29 |
| Exhibit 29. Change Management View ICR with Success Message | 29 |
| Exhibit 30. Task(s) Popup..... | 30 |
| Exhibit 31. System Activity Logs Page..... | 31 |
| Exhibit 32. System Activity Logs Information with Column Filter Example..... | 32 |
| Exhibit 33. System Activity Logs Filtered for Exporting Data..... | 33 |
| Exhibit 34. Exported System Activity Logs in a Spreadsheet..... | 33 |
| Exhibit 35. ILM Reports – PISR Compliance/Non-Compliance Report Example | 34 |
| Exhibit 36. FRA Report | 35 |
| Exhibit 37. ICI Relationships Report | 35 |
| Exhibit 38. ICI Attributes Report..... | 36 |
| Exhibit 39. ICI Versions Report..... | 36 |
| Exhibit 40. Custom Reports | 37 |
| Exhibit 41. Custom Reports Page with Completed PISR Report Fields | 38 |
| Exhibit 42. Custom PISR Report Output | 38 |
| Exhibit 43. Custom Reports with ICAB Attendees/Non-Attendees Report Output..... | 39 |

Learning about PTC ILM

Positive Train Control Interoperable Lifecycle Management (PTC ILM) is a platform that enables the railroad industry to manage the Interoperable Configuration Items (ICIs) and Interoperable Coordinated Deployment Items (ICDIs) that comprise the interoperable aspects of PTC throughout their lifecycle.

This document describes how to get started with PTC ILM in the following sections:

- [Getting Started with PTC ILM](#) on page 3
- [Viewing the ILM Application Suite](#) on page 7
- [Working with Tasks](#) on page 10
- [Working with the System Activity Logs](#) on page 31
- [Working with Reports](#) on page 34

Note: For detailed instructions about using the Railinc interface elements such as menus, calendar tools, and drop-down text boxes, refer to the [Railinc UI Dictionary](#).

Refer to the following documents for in-depth usage information:

- [PTC ILM Interoperable Change Management User Guide](#)
- [PTC ILM Interoperable Configuration Management User Guide](#)
- [PTC ILM Interoperable Release Management User Guide](#)

System Requirements

Recommended browsers are:

- Microsoft Edge (current version is recommended)
- Mozilla Firefox (current version is recommended)
- Google Chrome (current version is recommended)

Note: For best viewing of the PTC ILM application, Railinc recommends that you have your screen display resolution set to 1024 × 720 or higher (1920 x 1080 is optimal).

For more 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](#).

Supported Organization Relationship Types

In addition to managing their own information, railroads may have relationships in which one entity manages information for another entity. PTC ILM supports the following relationship types:

- *Host-Tenant Relationship* – a tenant railroad operates on PTC track of a host railroad with which they are related.

Note: It is possible to have both a host and tenant relationship with another railroad (for example, when each railroad operates on PTC track of the other).

- *Holding Company-Subsidiary Relationship* – a subsidiary is owned or managed by a railroad holding company.
- *Railroad-Service Provider Relationship* – a railroad has designated a related service provider to act on their behalf for purposes of PTC ILM.

Accessing the Railinc Customer Success Center

The Railinc Customer Success Center (CSC) 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 with PTC ILM

Access PTC ILM by using Railinc Single Sign-On (SSO), a web application that provides convenient access to a variety of Railinc products. To get started, go to the Railinc portal at <https://www.railinc.com> and log in to SSO by selecting the Customer Login link at the top right of the page, entering your user ID and password in the fields, and then selecting **Sign In**.

Registering to Use Railinc SSO

Each PTC ILM user must register to use Railinc Single Sign-On (SSO). If you do not already have a Railinc SSO user ID and password, refer to the [Single Sign-On and Launch Pad User Guide](#). Once you have access to Railinc SSO, you must request access to PTC ILM within SSO.

Note: If you are a service provider and need access to PTC ILM, refer to [Railinc's onboarding application](#).

Requesting PTC ILM Access

After you receive authorization to use Railinc SSO, you must request access to PTC ILM as described in the [Single Sign-On and Launch Pad User Guide](#).

From the SSO/Launch Pad Request Application Access by Role page, choose the appropriate user role and enter the Mark for your railroad. The available roles are described below:

Interoperable Change Manager

Users with this role can add responses and approvals to ICRs, IDRs, and SIDRs and can perform admin functions within the change management process. This role is non-requestable through the application – contact Railinc if you need access to this role.

Interoperable Configuration Manager

Users with this role can perform all admin functions to maintain the ICDIs, ICIs, and the ICMDb database and maintain development tracking for newer ICIs. This role is non-requestable through the application – contact Railinc if you need access to this role.

Interoperable Release Manager

Users with this role can initiate and update new PTC Interoperable System Releases and enter approvals for PTC Interoperable System Releases. This role is non-requestable through the application – contact Railinc if you need access to this role.

Standard User

Users with this role have read-only access to all modules of the application. Select this role if you are not an interoperable manager, but you do need to view PTC ILM information.

Railroad Change Manager

Users with this role can perform all functions related to a change request on behalf of their railroad and its subsidiaries. Select this role if you need to create, respond to, and approve ICRs, IDRs, and SIDRs within the system.

Railroad Configuration Manager

Users with this role can baseline their railroad configuration of ICIs and enter ICI version attributes of new ICIs.

Railroad Release Manager

Users with this role can initiate and update new railroad input PTC Interoperable System Releases.

Railroad PTC ILM System Administrator

This role is for the Company Administrator who will manage access-related roles for their company. This user will receive emails for requested permissions for their respective company and must grant permission as determined by their respective company.

ILM Reports

This role enables users to access the ILM reports.

When you complete the permission request process, your application access request is submitted for evaluation. If your request is approved, you will receive an approval email.

Once you receive e-mail notification of access to PTC ILM, you can log in and begin using PTC ILM (see [Logging In](#) on page 6); however, you must set up your PTC ILM contact information in FindUs.Rail before you can receive email notifications of PTC ILM requests or create new requests (see [Registering to Use FindUs.Rail](#) below for more information).

Registering to Use FindUs.Rail

Important: In order to receive email notifications of requests created using PTC ILM or to create new requests, you must be registered in FindUs.Rail, a Railinc application that serves as a central directory of contacts for the rail industry.

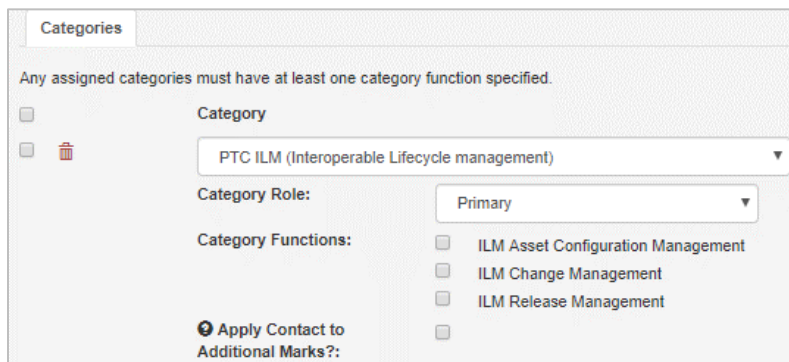
If you do not have access to FindUs.Rail, you must request access to the FindUs.Rail application as described in the [Single Sign-On and Launch Pad User Guide](#). When you are prompted to select a role, select **Contact Company Admin for MARK** unless you need permission to approve FindUs.Rail access requests for other users at your company (in that case, select **FindUsRail Company Admin**). It may take up to two business days to process your request.

Once you have access to FindUs.Rail (or if you already have access), use the following procedure to set up FindUs.Rail to work with PTC ILM:

1. Log in to www.railinc.com and select **FindUs.Rail** in the Your Applications portlet.
2. Select **Contacts** from the menu bar, and then select **Add Contact**.

Note: If you need to add an email group, then select **Organization** as the Contact Type and add the email address for the group.
3. Complete the fields in the **Contact** section. Required fields are labeled in red. In the **Email** field, enter the email address where you would like to receive notifications from PTC ILM. You can enter a group email in this field if you want multiple contacts to receive notifications.
4. In the Categories section, select **PTC ILM (Interoperable Lifecycle Management)** from the **Category** drop-down ([Exhibit 1](#)).

Exhibit 1. FindUs.Rail Add Contact Categories Section



For a railroad to send or receive PTC ILM notification emails, one email address must be set up with the Primary category role for any ILM category function.

5. If you are the primary ILM Contact, select **Primary** in the Category Role field, and then select one or more categories in the Category Functions area.

Note: There can only be one primary contact per category, but there can be many secondary contacts. If a primary contact already exists for a category, simply add yourself as a secondary contact.
6. As needed, set up the remaining category functions. If there is no primary contact specified for a category function, you can select **Primary**. If you want to be a secondary contact for the remaining category functions, select **Add** to add a new category, select **PTC ILM (Interoperable Lifecycle Management)** from the **Category** drop-down, select **Secondary**, and select the checkboxes for the remaining category functions.
7. Once you have completed the Contact and Categories sections, select **Save** at the bottom right of the page. The contact information is saved and will be used to send email notifications for PTC ILM requests and responses.

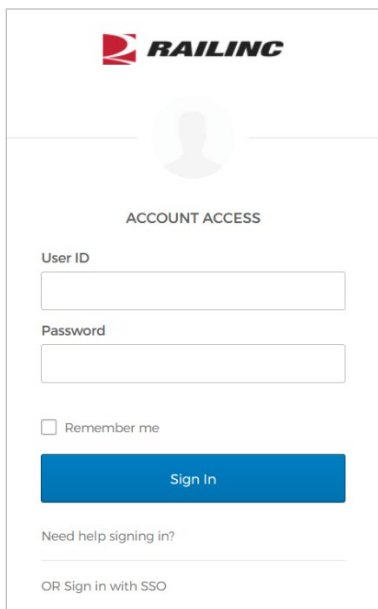
Refer to the [FindUs.Rail web page](#) for more information, including a user guide and demos.

Logging In

To log in to PTC ILM:

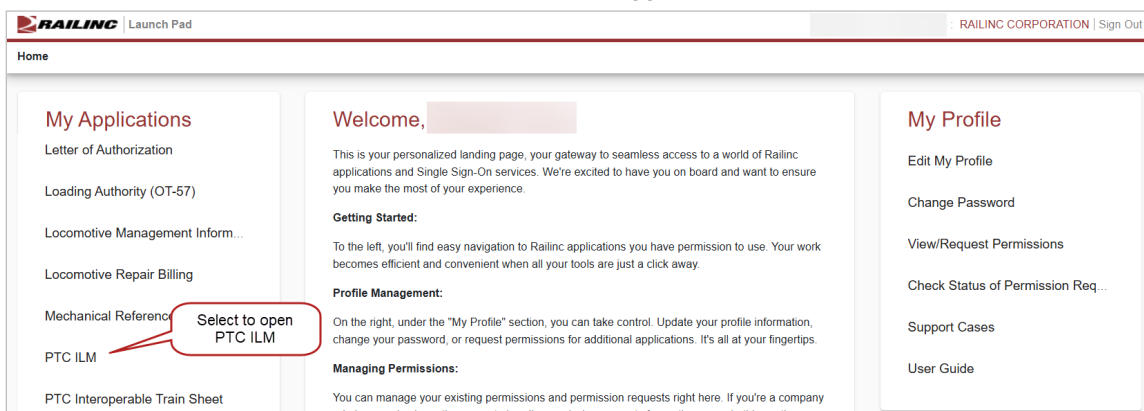
1. Open your internet browser and go to the Railinc web portal at www.railinc.com.
2. Select the **Customer Login** link at the upper right of the page. The Account Access panel is displayed ([Exhibit 2](#)).

Exhibit 2. Account Access Panel



3. Enter your user ID and password, and select **Sign In**. Your Railinc Launch Pad showing authorized Railinc applications is displayed ([Exhibit 3](#)).

Exhibit 3. Launch Pad with PTC ILM as an Authorized Application



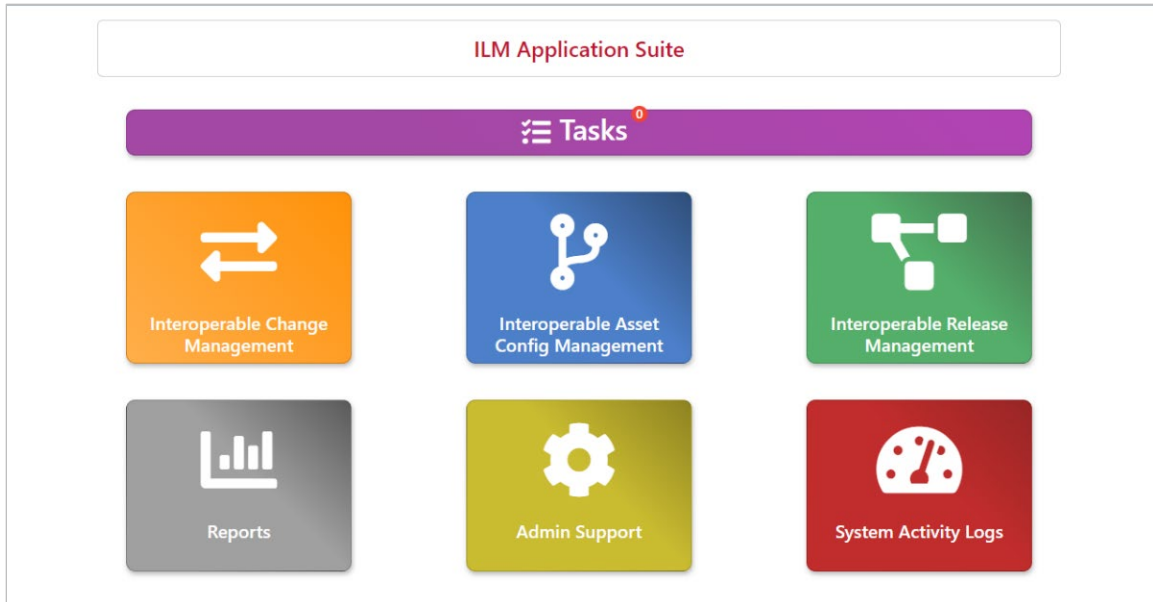
Note: For more information, refer to the [Single Sign-On and Launch Pad User Guide](#).

4. Select **PTC ILM**. The PTC ILM Application Suite is displayed. Continue with [Viewing the ILM Application Suite](#) on page 7.

Viewing the ILM Application Suite

Once you successfully log in to PTC ILM, you can see the ILM Application Suite page, which contains icons that enable you to access the PTC ILM application modules, reports, and administrator support ([Exhibit 4](#)).

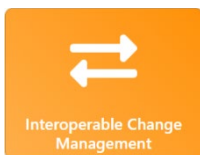
Exhibit 4. ILM Application Suite Page



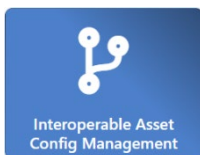
The ILM Application Suite page provides access to the following functions:



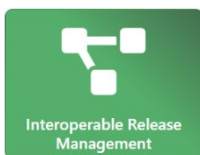
Provides access to the Tasks module. This module enables you to manage tasks assigned to your company and by your company. See [Working with Tasks](#) on page 10 for more information.



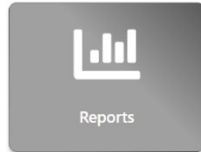
Provides access to the Interoperable Change Management application module. This module enables you to create ICRs, IDRs, and SIDRs. It also enables you to record Interoperable Change Approval Board (ICAB) meeting attendance. Refer to the [PTC ILM Interoperable Change Management User Guide](#) for information about this module.



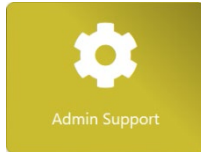
Provides access to the Interoperable Asset Configuration Management application module. This module enables you to manage the relationships and versions and deployment of ICIs. Refer to the [PTC ILM Interoperable Configuration Management User Guide](#) for information about this module.



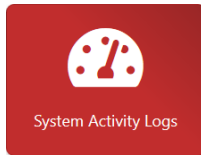
Provides access to the Interoperable Release Management application module. This module enables you to view and compare the latest ICI versions as well as create a Railroad Release Input Draft. Refer to the [PTC ILM Interoperable Release Management User Guide](#) for information about this module.



Provides access to the Reports application module. This module enables you to view reports based upon ICR to ICI relationships. See [Working with Reports](#) on page 34 for information about this module.



Provides access to the Admin Support application module. This module enables PTC ILM railroad administrators to configure participants and participant relationships, FindUs.Rail information, and relationships between ICIs and ICI versions as well as configure email notifications and the Digest Report. Refer to the [PTC ILM Interoperable Change Management User Guide](#) for more information.



Enables you to access the System Activity Logs module, which provides searchable records of user activity. See [Working with the System Activity Logs](#) on page 31 for more information.

Once you select an icon, the selected application module is displayed within a framework that allows you to switch between application modules. [Exhibit 5](#) shows an example of an application module within the ILM framework.

Exhibit 5. Example Application Module Within the ILM Framework

Advanced Search

Id: Requesting Railroad: ALL SELECTED From Date: 8/14/2024

Select Status: ALL SELECTED Select ICI Name(s): ALL SELECTED Select ICDI Category: ALL SELECTED To Date:

Request Type: ALL SELECTED Request Subtype: ALL SELECTED Clear Reset Search

Search Results **Action Required Responses** Action Required Approvals Active Requests My Response History

Not Applicable Number of Action Required Responses: 16 of 16 Clear Filters Download Refresh

| Actions | ICI(s)/ICDI | Version(s) of Affected ICI(s)/ICDI | Type | ICRs | IDRs | SIDRs | Requesting Railroad(s) | Current Status | Response Due Date |
|---|---|------------------------------------|-----------------|------|------|-------|------------------------|------------------|-------------------|
| <input type="checkbox"/> Add Response | AAR: S-YYYY I-ETMS Logging and ... ITC: I-ETMS PTC Human Factors Ev... WRE: I-ETMS Onboard Software | WRE 1.15 4.2 6.3.24.7 | Mandatory D... | 5599 | | | ACEX | Business Appr... | 02/20/2025 |
| <input type="checkbox"/> Add Response | ITC: Operations & Support Hazard ... ITC: PTC Concept of Operations WRE: I-ETMS Onboard Software | CKT 1CK Christy Test | New Permissi... | 5598 | | | ACEX | Business Appr... | 02/20/2025 |
| <input type="checkbox"/> Add Response | 3.2 Related ICI 3.2 Relationship Test | 8.0 8.0 | New Permissi... | 5577 | | | TESX | Business Appr... | 02/04/2025 |

The ILM framework provides a toolbar with icons that enable you to do the following tasks:



Expand the toolbar to show the names associated with each icon.



Return to the PTC ILM Application Suite page.



Switch to the Tasks application module.



Switch to the Interoperable Change Management application module.



Switch to the Interoperable Asset Config Management application module.



Switch to the Interoperable Release Management application module.



Switch to the Reports application module.



Switch to the Admin Support application module.



Switch to the System Logs application module.

Working with Tasks

The PTC ILM Tasks module provides a way for two interoperable partners to track communications about tasks related to PTC ILM that need to be completed outside of the PTC ILM application. For example, these communications might include one partner advising another partner of a change that they plan to implement and the other partner indicating how they plan to respond to the change.

The Tasks feature has components within the Change Management, Configuration Management, and Release Management modules. The Tasks Dashboard is launched from the ILM Application Suite page (see [Exhibit 4](#)).

When you select **Tasks** on the ILM Application Suite page, the Tasks Dashboard is displayed ([Exhibit 6](#)).

Exhibit 6. Tasks Dashboard

| ID | Assigner | Assigned | Last Comment Modified Date Time | Module | Type | ICI/ICDI/PISR | Version | Task Status | Closure Status | Task Deadline | Created Date |
|------|----------|----------|---------------------------------|--------------------|---------|--|----------|-------------|----------------|---------------|-------------------|
| 1807 | TESX | BNSF | | Release Management | RELEASE | Approved | 14.0.0.1 | Pending | | 02/22/2025 | 02/13/2025 14:... |
| 1803 | AMTK | BNSF | 01/31/2025 08:09 | Change Management | ICR | 3.2 Relationship Test 3.2 Related ICI | 8.0 | Pending | | 04/18/2025 | 01/31/2025 08:... |

When initially opened, the Tasks Dashboard displays the **Assigned To My Company** tab, which lists all of the tasks assigned to your company. You can select the **Assigned By My Company** tab to see all of the currently active tasks assigned by your company.

Note: The number in the red circle at the top left indicates how many tasks are currently assigned to your company and are in **Pending** status. This number increases as your company is assigned more tasks and decreases as your company works on tasks and their status changes to **In Progress** and **Closed**.

The Tasks Dashboard displays the following:

- The Advanced Search panel, which is collapsible, enables you to enter search criteria and locate specific tasks. See [Using the Advanced Search Panel](#) on page 11 for more information.

- The menu bar, which contains tabs that enable you to specify the list of items to display.

Note: Each tab provides a grid with sorting, filtering, and exporting functionality as described in [Sorting and Filtering Search Results](#) on page 13 and [Exporting Search Results](#) on page 14.

- [Search Results](#) displays the results of the specified search criteria.
 - [Assigned To My Company](#) displays tasks that are assigned to your company (this is the default).
 - [Assigned By My Company](#) displays tasks that your company has assigned to another company.
- The **Display Closed and Cancelled Tasks** toggle, which you can use to include closed and cancelled tasks in the grid.
- The **Number of Tasks** indicator, which shows the number of tasks currently displayed in the grid.
- The **Clear Filters** button, which enables you to remove any filters you may have set.
- The Export to CSV icon (↓), which allows you to export the contents of the grid to a CSV file (see [Exporting Search Results](#) on page 14).
- The grid, which contains a list of tasks that match the search results or tab criteria (see [Managing Tasks Assigned to Your Company](#) on page 15 for more information).

You can also sort and filter the displayed information (see [Sorting and Filtering Search Results](#) on page 13).

Using the Advanced Search Panel

The Advanced Search panel, which you can access by selecting ▼ at the top right of the Tasks Dashboard and collapse by selecting ^, enables you to specify search criteria for locating tasks and display them in the grid ([Exhibit 7](#)).

Exhibit 7. Advanced Search Panel

The screenshot shows the 'Advanced Search' panel with the following fields and controls:

- Id:** A text input field.
- Assigner Company:** A dropdown menu with 'ALL SELECTED' selected.
- Assigned Company:** A dropdown menu with 'ALL SELECTED' selected.
- Module:** A dropdown menu with 'ALL SELECTED' selected.
- Request Type:** A dropdown menu with 'ALL SELECTED' selected.
- Select ICI Name(s):** A dropdown menu with 'ALL SELECTED' selected.
- Select ICDI Category:** A dropdown menu with 'ALL SELECTED' selected.
- Select Status:** A dropdown menu with 'ALL SELECTED' selected.
- From Date:** A date input field with a calendar icon.
- To Date:** A date input field with a calendar icon.
- Buttons:** 'Clear' (red), 'Reset' (gray), and 'Search' (blue with a magnifying glass icon).

You can modify any or all of the search criteria to locate the task(s) you need. Depending on the criteria you modify, you may need to select **Clear** to remove the existing search criteria before searching.

Examples:

- To search for a specific known task, type the Task ID in the ID field.
- To search for an Assigner Company – use the **Assigner Company** drop-down to search by the company or companies that created the task(s).
- To search for an Assigned Company – use the **Assigned Company** drop-down to search by the company or companies that have been assigned to the task(s).
- To search for tasks created using a specific PTC ILM module – use the **Module** drop-down to search by the module used to create the task(s).
- To search for tasks in a specific status, use the **Select Status** drop-down to check the status(es) you need.
- To search for a specific type of task, use the **Request Type** drop-down to check the type(s) of task(s) to search for (ICR, IDR, SIDR, ICI, and/or Release).
- To search for ICI names, use the **Select ICI Name(s)** drop-down to check the appropriate ICI names.
- To search for a specific ICDI category, use the **Select ICDI Category** drop-down to check the box(es) for the ICDI categories you need.
- To search for tasks within a specific date range, use the calendar tool to select dates in the **From Date** and the **To Date** fields.

For the search fields that contain drop-down lists, you can check the **Select All** box at the top of the list to include every item in the list in your search criteria.

Once you have entered the appropriate search criteria, select **Search** to display the results in the “Search Results” tab is displayed to the left of the “Assigned To My Company” and the “Assigned By My Company” tabs, and is populated based on the search criteria (see [Exhibit 8](#)).

Note: If you perform a search without specifying any search criteria, the Search Results tab displays all of the tasks that have been created within the PTC ILM application.

To return all fields to their default settings, select **Reset**.

Exhibit 8. Tasks Dashboard with the Search Results Tab

Advanced Search

Id Assigner Company ALL SELECTED Assigned Company ALL SELECTED Module ALL SELECTED

Request Type ALL SELECTED Select ICI Name(s) ALL SELECTED Select ICDI Category ALL SELECTED

Select Status ALL SELECTED From Date To Date Clear Reset Search

Search Results Assigned To My Company Assigned By My Company

Number of Tasks: 1619 of 1619 Clear Filters Download Refresh

| ID | Assigner | Assigned | Module | Type | ICI/ICDI/PIISR | Version | Task Status | Closure Status | Task Deadline | Created Date |
|------|----------|----------|--------------------|---------|--|----------|-------------|-----------------------------|---------------|------------------|
| 1808 | TESX | TESX | Release Management | RELE... | Approved | 14.0.0.1 | Pending | | 02/22/2025 | 02/13/2025 14:38 |
| 1806 | TESX | ACEX | Release Management | RELE... | Approved | 14.0.0.1 | Pending | | 02/22/2025 | 02/13/2025 14:38 |
| 1804 | AMTK | TESX | Change Management | ICR | 3.2 Related ICI 3.2 Relationship Test | 8.0 | Closed | Implemented with Conditions | 04/18/2025 | 01/31/2025 08:09 |

Note: The Advanced Search panel only applies to the “Search Results” tab, and not the “Assigned To My Company” tab or the “Assigned By My Company” tab.

Sorting and Filtering Search Results

As described in [Managing Tasks Assigned to Your Company](#) on page 15, the grid section of the Tasks Dashboard shows the results of searches, and “Assigned To My Company” and “Assigned By My Company” for your railroad ([Exhibit 9](#)).

Exhibit 9. Tasks Dashboard with the Search Results

Search Results Assigned To My Company Assigned By My Company

Number of Tasks: 1619 of 1619 Clear Filters Download Refresh

| ID | Assigner | Assigned | Module | Type | ICI/ICDI/PIISR | Version | Task Status | Closure Status | Task Deadline | Created Date |
|------|----------|----------|--------------------|---------|---|-----------------------|-------------|-----------------------------|---------------|------------------|
| 1808 | TESX | TESX | Release Management | RELE... | Approved | 14.0.0.1 | Pending | | 02/22/2025 | 02/13/2025 14:38 |
| 1806 | TESX | ACEX | Release Management | RELE... | Approved | 14.0.0.1 | Pending | | 02/22/2025 | 02/13/2025 14:38 |
| 1804 | AMTK | TESX | Change Management | ICR | 3.2 Related ICI 3.2 Relationship Test | 8.0 | Closed | Implemented with Conditions | 04/18/2025 | 01/31/2025 08:09 |
| 1798 | TESX | TESX | Change Management | ICR | 3.2 Retired ICI 3.2 Related ICI | 1.0 8.0 | Closed | Implemented Successfully | 11/26/2024 | 11/25/2024 10:43 |
| 1797 | METX | TESX | Change Management | ICR | 3.2 Relationship Test 3.2 Related ICI | 1.0 | Closed | Implemented Successfully | 07/20/2039 | 11/21/2024 11:12 |
| 1796 | BNSF | TESX | Change Management | ICR | WRE: WCR-SAF-1370 Hazard Log (ha... WRE: I-ETMS Onboard Software | Rev J Christy Test | Closed | Implemented Successfully | 11/29/2024 | 11/21/2024 10:14 |
| 1794 | TESX | TESX | Change Management | ICR | 3.2 Related ICI 3.2 Relationship Test | 4.0 | Closed | Not Implemented | 11/22/2024 | 11/19/2024 10:26 |
| 1792 | TRRA | UP | Change Management | IDR | WRE: I-ETMS Onboard Software | 6.3.24.10 | Closed | Implemented Successfully | 12/03/2024 | 11/15/2024 10:03 |
| 1791 | TRRA | NS | Change Management | IDR | WRE: I-ETMS Onboard Software | 6.3.24.10 | Closed | Implemented Successfully | 12/03/2024 | 11/15/2024 10:03 |

With no search criteria specified, the grid lists rows of tasks that have been entered into PTC ILM and displays columns of information about each item.

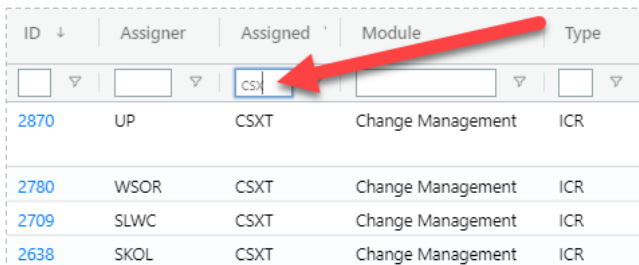
To see all the rows in the grid, use the vertical scroll bar. Use the horizontal scroll bar to view any data that exceeds the width of the viewable area.

You can sort the displayed information by column in ascending or descending order. Simply select the column heading for the column you want to sort. An arrow (↑ or ↓) is displayed next to the heading to indicate the sort order. Select the column heading again to switch the sort order. Select the column heading a third time to remove the sort on that column.

You can filter the information displayed in the grid to only show rows containing information you need to see. Each column contains a filter field directly below the column heading.

To apply a filter to a column, type a word or phrase in a column's filter field that you want to see in the results. The displayed results are narrowed to only show rows that contain the filtered word or phrase. A filter icon (▼) is displayed in the column heading to remind you about the filter ([Exhibit 10](#)).

Exhibit 10. Tasks Dashboard with a Column Filter Entered



The screenshot shows a table with five columns: ID, Assigner, Assigned, Module, and Type. Each column has a filter icon (▼) below its header. The 'Assigned' column's filter field contains the text 'CSX'. A red arrow points to this filter field. The table displays four rows of data, all of which have 'CSXT' in the 'Assigned' column, indicating they are filtered results.

| ID | Assigner | Assigned | Module | Type |
|------|----------|----------|-------------------|------|
| 2870 | UP | CSXT | Change Management | ICR |
| 2780 | WSOR | CSXT | Change Management | ICR |
| 2709 | SLWC | CSXT | Change Management | ICR |
| 2638 | SKOL | CSXT | Change Management | ICR |

Tip! You can apply filters to multiple columns at once.

To remove filters, select the **Clear Filters** button or delete the characters from the filter field.

Note: Any changes that you make to the grid using sorting or filters are reflected if the data is exported.

Exporting Search Results

You can export the information displayed in the grid to a Comma Separated Value (CSV) file, which can then be opened in a spreadsheet application.

Once you have the information you want to export displayed in the grid, select the Export to CSV icon (📄) to download the grid contents to a CSV file ([Exhibit 11](#)).

Exhibit 11. Tasks Dashboard Filtered for Exporting Data

Number of Tasks: 128 of 1619 Clear Filters Download Refresh

| ID | Assigner | Assigned | Module | Type | ICI/ICDI/PI/SR | Version | Task Status | Closure Status | Task Deadline | Created Date |
|------|----------|----------|-------------------|------|------------------------------|-----------|-------------|--------------------------|---------------|------------------|
| 1789 | TPW | CSXT | Change Management | IDR | WRE: I-ETMS Onboard Software | 6.3.24.10 | Closed | Implemented Successfully | 11/14/2024 | 11/11/2024 18:12 |
| 1749 | TNER | KCS | Change Management | IDR | WRE: I-ETMS Onboard Software | 6.3.24.10 | Cancelled | | 11/14/2024 | 11/11/2024 18:09 |
| 1737 | TNER | CSXT | Change Management | IDR | WRE: I-ETMS Onboard Software | 6.3.24.10 | Cancelled | | 11/14/2024 | 11/11/2024 18:09 |
| 1711 | KWT | CSXT | Change Management | IDR | WRE: I-ETMS Onboard Software | 6.3.24.10 | Closed | Implemented Successfully | 11/14/2024 | 11/11/2024 18:05 |
| 1709 | IORY | CSXT | Change Management | IDR | WRE: I-ETMS Onboard Software | 6.3.24.10 | Closed | Implemented Successfully | 11/14/2024 | 11/11/2024 18:04 |
| 1661 | AGR | KCS | Change Management | IDR | WRE: I-ETMS Onboard Software | 6.3.24.10 | Cancelled | | 11/14/2024 | 11/11/2024 17:29 |
| 1649 | AGR | CSXT | Change Management | IDR | WRE: I-ETMS Onboard Software | 6.3.24.10 | Cancelled | | 11/14/2024 | 11/11/2024 17:29 |
| 1608 | NS | CSXT | Change Management | IDR | WRE: I-ETMS Onboard Software | 6.3.24.10 | Closed | Implemented Successfully | 11/11/2024 | 11/05/2024 09:53 |
| 1603 | NS | KCS | Change Management | IDR | WRE: I-ETMS Onboard Software | 6.3.24.10 | Closed | Implemented Successfully | 11/11/2024 | 11/05/2024 09:53 |
| 1592 | CPRS | KCS | Change Management | IDR | WRE: I-ETMS Onboard Software | 6.3.24.10 | Closed | Implemented Successfully | 11/12/2024 | 11/05/2024 08:48 |
| 1590 | CPRS | CSXT | Change Management | IDR | WRE: I-ETMS Onboard Software | 6.3.24.10 | Closed | Implemented Successfully | 11/12/2024 | 11/05/2024 08:48 |
| 1584 | KCS | CSXT | Change Management | IDR | WRE: I-ETMS Onboard Software | 6.3.24.10 | Closed | Implemented Successfully | 11/12/2024 | 11/05/2024 08:40 |
| 1576 | NICD | CSXT | Change Management | SIDR | Other | | Closed | Implemented Successfully | 11/15/2024 | 10/30/2024 12:11 |
| 1562 | CN | CSXT | Change Management | IDR | WRE: I-ETMS Onboard Software | 6.3.24.10 | Closed | Implemented Successfully | 10/30/2024 | 10/28/2024 13:40 |
| 1561 | CN | KCS | Change Management | IDR | WRE: I-ETMS Onboard Software | 6.3.24.10 | Closed | Implemented Successfully | 10/30/2024 | 10/28/2024 13:40 |
| 1539 | CSXT | KCS | Change Management | SIDR | Other | | Closed | Implemented Successfully | 12/15/2024 | 10/23/2024 10:12 |
| 1516 | CSXT | KCS | Change Management | IDR | WRE: I-ETMS Onboard Software | 6.3.24.10 | Closed | Implemented Successfully | 10/29/2024 | 10/21/2024 13:44 |
| 1491 | UP | KCS | Change Management | IDR | WRE: I-ETMS Onboard Software | 6.3.24.10 | Closed | Implemented Successfully | 10/22/2024 | 10/16/2024 13:51 |

Note: Any changes that you make to the grid using sorting or filters are reflected in the export.

Once the results are exported to a CSV file, you can then view them in a spreadsheet application ([Exhibit 12](#)).

Exhibit 12. Exported Tasks in a Spreadsheet

| | A | B | C | D | E | F | G | H | I | J | K |
|----|------|----------|----------|----------|------|-----------------------|-------------|----------------|---------------|------------------|---|
| 1 | ID | Assigner | Assigned | Module | Type | ICI/ICDI/PI/Version | Task Status | Closure Status | Task Deadline | Created Date | |
| 2 | 1789 | TPW | CSXT | Change M | IDR | WRE: I-ETMS 6.3.24.10 | Closed | Implemented Si | 11/14/2024 | 11/11/2024 18:12 | |
| 3 | 1749 | TNER | KCS | Change M | IDR | WRE: I-ETMS 6.3.24.10 | Cancelled | | 11/14/2024 | 11/11/2024 18:09 | |
| 4 | 1737 | TNER | CSXT | Change M | IDR | WRE: I-ETMS 6.3.24.10 | Cancelled | | 11/14/2024 | 11/11/2024 18:09 | |
| 5 | 1711 | KWT | CSXT | Change M | IDR | WRE: I-ETMS 6.3.24.10 | Closed | Implemented Si | 11/14/2024 | 11/11/2024 18:05 | |
| 6 | 1709 | IORY | CSXT | Change M | IDR | WRE: I-ETMS 6.3.24.10 | Closed | Implemented Si | 11/14/2024 | 11/11/2024 18:04 | |
| 7 | 1661 | AGR | KCS | Change M | IDR | WRE: I-ETMS 6.3.24.10 | Cancelled | | 11/14/2024 | 11/11/2024 17:29 | |
| 8 | 1649 | AGR | CSXT | Change M | IDR | WRE: I-ETMS 6.3.24.10 | Cancelled | | 11/14/2024 | 11/11/2024 17:29 | |
| 9 | 1608 | NS | CSXT | Change M | IDR | WRE: I-ETMS 6.3.24.10 | Closed | Implemented Si | 11/11/2024 | 11/5/2024 9:53 | |
| 10 | 1603 | NS | KCS | Change M | IDR | WRE: I-ETMS 6.3.24.10 | Closed | Implemented Si | 11/11/2024 | 11/5/2024 9:53 | |
| 11 | 1592 | CPRS | KCS | Change M | IDR | WRE: I-ETMS 6.3.24.10 | Closed | Implemented Si | 11/12/2024 | 11/5/2024 8:48 | |
| 12 | 1590 | CPRS | CSXT | Change M | IDR | WRE: I-ETMS 6.3.24.10 | Closed | Implemented Si | 11/12/2024 | 11/5/2024 8:48 | |

Managing Tasks Assigned to Your Company

The **Assigned To My Company** tab is the default tab that is displayed when you open the Tasks module. This tab lists all of the tasks assigned to your company that are in “Pending” or “In Progress” status.

Note: You can select the **Display Closed and Cancelled Tasks** toggle to also display tasks assigned to your company that are in “Closed” or “Cancelled” status ([Exhibit 13](#)).

Exhibit 13. Tasks Dashboard Showing the Assigned To My Company Tab

| Advanced Search | | | | | | | | | | | |
|--|----------|----------|---------------------------------|--------------------|----------|--|-----------|-------------|--------------------------|---------------|-------------------|
| Assigned To My Company | | | | | | Assigned By My Company | | | | | |
| <input checked="" type="checkbox"/> Display Closed and Cancelled Tasks | | | | | | Number of Tasks: 93 of 93 <input type="button" value="Clear Filters"/> <input type="button" value="Print"/> <input type="button" value="Refresh"/> | | | | | |
| ID | Assigner | Assigned | Last Comment Modified Date Time | Module | Type | ICI/ICDI/PISR | Version | Task Status | Closure Status | Task Deadline | Created Date |
| 1807 | TESX | BNSF | | Release Management | RELEA... | Approved | 14.0.0.1 | Pending | | 02/22/2025 | 02/13/2025 14:... |
| 1803 | AMTK | BNSF | 01/31/2025 08:09 | Change Management | ICR | 3.2 Relationship Test 3.2 Related ICI | 8.0 | Pending | | 04/18/2025 | 01/31/2025 08:... |
| 1772 | TNER | SDRX | | Change Management | IDR | WRE: I-ETMS Onboard Softw... | 6.3.24.10 | Cance... | | 11/14/2024 | 11/11/2024 18:... |
| 1758 | TNER | MNRX | | Change Management | IDR | WRE: I-ETMS Onboard Softw... | 6.3.24.10 | Cance... | | 11/14/2024 | 11/11/2024 18:... |
| 1726 | TNER | BNSF | | Change Management | IDR | WRE: I-ETMS Onboard Softw... | 6.3.24.10 | Cance... | | 11/14/2024 | 11/11/2024 18:... |
| 1716 | PNWR | BNSF | | Change Management | IDR | WRE: I-ETMS Onboard Softw... | 6.3.24.10 | Closed | Implemented Successfully | 11/14/2024 | 11/11/2024 18:... |
| 1713 | LDNR | BNSF | | Change Management | IDR | WRE: I-ETMS Onboard Softw... | 6.3.24.10 | Closed | Implemented Successfully | 11/14/2024 | 11/11/2024 18:... |
| 1684 | AGR | SDRX | | Change Management | IDR | WRE: I-ETMS Onboard Softw... | 6.3.24.10 | Cance... | | 11/14/2024 | 11/11/2024 17:... |

The Assigned To My Company tab contains the following columns of information:

| | |
|--|---|
| ID | A hyperlinked identifier that you can select to open the associated task on the Task Details page for viewing (and editing, if applicable). See Viewing Task Details on page 17 for more information. |
| Assigner | The mark of the company that assigned the task to your company. |
| Assigned | The mark of the company to which the task is assigned (your company). |
| Last Comment Modified Date Time | A timestamp in this column indicates the date and time when the last comment was added to the task. <u>If no timestamp is displayed</u> , there are no comments for the task. |
| Module | The PTC ILM module in which the task was created (Change Management, Configuration Management, or Release Management). |
| Type | The type of the task (ICR, IDR, SIDR, ICI, or RELEASE). |
| ICI/ICDI/PISR | The ICI, ICDI, or PISR status with which the task is associated. |
| Version | Indicates the version(s) of the ICI/ICDI/PISR associated with the task. |
| Task Status | <p>The status of the task:</p> <p>Pending – the task has not yet been worked on by the company to which it has been assigned.</p> <p>In Progress – the task is being worked on by the company to which it has been assigned.</p> <p>Closed – the task has been Closed by the company to which it was assigned.</p> <p>Cancelled – the task has been cancelled by the company that created it.</p> |

| | |
|----------------|--|
| Closure Status | If the status of the task is Closed , this field provides additional status information (Implemented Successfully, Implemented with Conditions, Not Implemented). |
| Task Deadline | The date by which the task should be closed as set by the assigner. If the date is in red, this indicates that it is past due. |
| Created Date | The date on which the task was created by the assigner. |

Viewing Task Details

When you select a Task ID hyperlink from the Tasks Dashboard (see [Exhibit 6](#)), the Task Details page is displayed ([Exhibit 14](#)).

Exhibit 14. Tasks Details

Task ID: 1807

Download PDF

Assigner Company:
MXV RAIL

Assigned Company:
BNSF

Task Status:
Pending

Closure Status:

Task Details

View Activity

Task Title:
Generic

Task Deadline:
02/22/2025

Task Created Date:
02/13/2025 14:38:22

Module:
Release Management

PISR Version Status:
Approved

PISR Version:
v14.0.0.1

Task Plan Description:
test

Comments:

Add a Comment

Entered by on 02/14/2025 at 09:22 AM:
On Thursday, February 28, 2025 between 11:00-11:30AM ET, Railinc will add i to our RAIL locomotive group in BOS. Be sure to make these changes to your i group(s) for RAIL locomotives to ensure proper operations continue as planned on 2/28/2025.

Supplemental Materials:

+ Select File(s)

Upload Files

Drag and Drop Files Here

1 of 1

| File Name | Size | Uploaded | Uploaded By | Owner Railroad | Status |
|-----------------------------|-------|---------------------|-------------|----------------|----------|
| Additional Instructions.pdf | 15885 | 02/14/2025 10:20:06 | MICHTW | BNSF | UPLOADED |

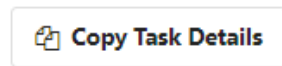
The Task Details page enables you to view the details of the task. It displays the following:

| | |
|------------------|--|
| Task ID | A numeric identifier for the task. |
| Assigner Company | The well-known name of the company that assigned the task. |
| Assigned Company | The well-known name of the company to which the task is assigned. |
| Task Status | The current status of the task (Pending, In Progress, Closed, or Cancelled). |

Closure Status

If the status of the task is Closed, this field provides additional status information (Implemented Successfully, Implemented with Conditions, or Not Implemented).

Depending on your access and whether you represent the assigner company or the assigned company, the following buttons may be displayed at the top of the Task Details section:



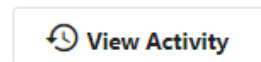
Copy the details of an existing task to create a new task (see [Copying Task Details](#) on page 22). This button is only available to the company that assigned the task.



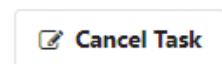
Modify the details of an existing task (see [Editing Task Details](#) on page 23). This edit icon next to the status is only available to the company that assigned the task.



This button allows the assigned company to update the Task Status.



View the Task Activity Log (see [Viewing the Task Activity Log](#) on page 24). This button is available to both the assigner company and the assigned company.



Cancel an existing task (see [Cancelling Tasks](#) on page 24). This button is only available to the company that assigned the task.

The Task Details section of the page displays the following information:

Task Title

A brief, descriptive title provided by the assigner.

Task Deadline

The date by which the task should be closed as set by the assigner. If the date is in red, this indicates that it is past due.

Task Created Date

The date on which the task was created by the assigner.

Module

The PTC ILM module in which the task was created (Change Management, Configuration Management, or Release Management).

Request *(for Change Management tasks only)*

This field contains a hyperlink to the ICR, IDR, or SIDR associated with the task.

ICI Name/ICDI Category and Version *(for Change Management tasks only)*

A grid showing the ICI Name/ICDI Category and version(s) associated with the task.

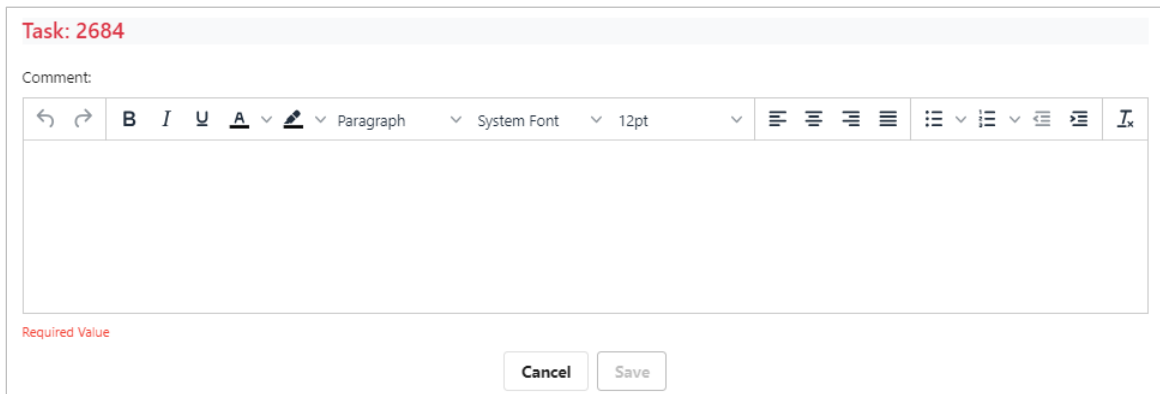
ICI Name and Version ICI Name and version associated with the task.
(for Configuration Management tasks only)

PISR Version Status and Version (for Release Management tasks only) These fields contain information about the status of the PISR and the version associated with the task.

Task Plan Description Description of the task as entered by the assigner.

The Comments section of the page displays all the comments that have been added to the task and contains an **Add a Comment** button that you can select to display a popup that enables you to save additional comments with the task (see [Exhibit 15](#)).

Exhibit 15. Comments Popup



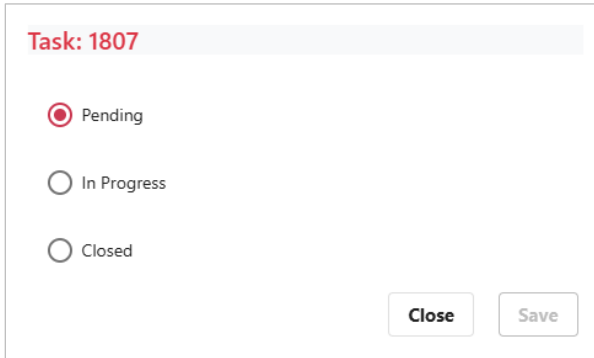
Type your comment, format it as needed, and select **Save** to save your comment with the task.

The Supplemental Materials section of the page displays any files that have been added to the task. You can select the **Select File(s)** button to locate files to upload to support the task. You can also drag and drop files to upload. The supported filetypes are: .doc, .docx, .msg, .txt, .csv, .ppt, .xml, .bmp, .gif, .jpg, .xls, .pdf, .xlsx, .pptx, .pem, .der, .crt, .cer, and .png.

Once you select the files you need, select **Upload Files** to upload the files to the server. You can select a file that has already been uploaded to download it to your local Downloads folder.

You can select the Task Status field to display a popup that enables you to change the status to **In Progress** or **Closed** ([Exhibit 16](#)).

Exhibit 16. Task Status Popup

A modal popup window titled "Task: 1807" in red text. It contains three radio button options: "Pending" (selected), "In Progress", and "Closed". At the bottom right, there are two buttons: "Close" and "Save".

Task: 1807

☒ Pending

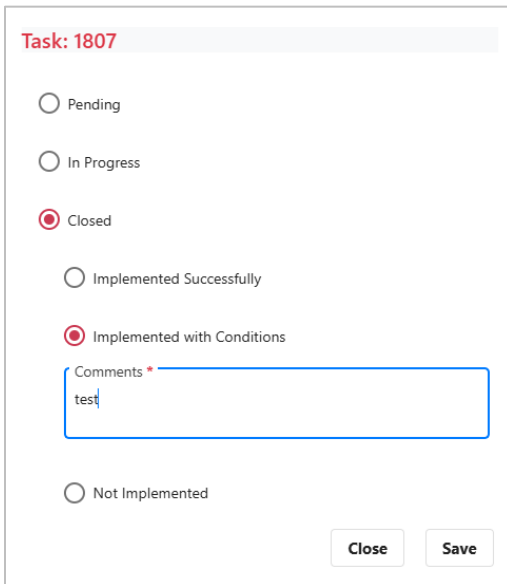
☐ In Progress

☐ Closed

Close Save

Note: If you choose the status of **Closed** and then select **Save**, a second popup is displayed that enables you to specify additional Closure Status information ([Exhibit 17](#)).

Exhibit 17. Completion Status Popup

A modal popup window titled "Task: 1807" in red text. It contains six radio button options: "Pending", "In Progress", "Closed" (selected), "Implemented Successfully", "Implemented with Conditions" (selected), and "Not Implemented". Below the "Implemented with Conditions" option is a text input field labeled "Comments *" with the text "test" entered. At the bottom right, there are two buttons: "Close" and "Save".

Task: 1807

☐ Pending

☐ In Progress

☒ Closed

☐ Implemented Successfully

☒ Implemented with Conditions

Comments *
test

☐ Not Implemented

Close Save

Choose a Closure Status (Implemented Successfully, Implemented with Conditions, or Not Implemented).

Note: If you choose the **Implemented with Conditions** or **Not Implemented** Closure Status, a comments box is displayed for you to add additional information. Adding a comment is required to save this closure status. Any comments added using this box will be displayed in the Comments section.

When you select **Save**, the Task Status is updated, the number of tasks in “Pending” status is decreased, and a success message is displayed ([Exhibit 18](#)).

Exhibit 18. Success Message



Once the task is closed, the Closure Status field is updated. You can continue to add comments or additional supplemental files as needed.

Copying Task Details

Select **Copy Task Details** from the Task Details page to copy the details of an existing task ([Exhibit 19](#)).

Exhibit 19. Copy Task Details

Copy Task Details:

Module:
Change Management

Request:
ICR-4290 - New Permissible Version

| ICI Name: | Version of Affected ICI(s): |
|----------------|-----------------------------|
| Christy Test | 5.0 |
| Christy Test 2 | 6.0 |

Assigned Railroad(s)
ALL SELECTED

Task Title *
Generic

Task Deadline *
12/22/2023

Task Plan Description *

On Thursday December 21, 2023, between 11:00 – 11:30AM ET, RAILINC will add I-ETMS software version 6.3.23.3 and its associated Railroad Config v4a.1.0 to our RAIL locomotive group in BOS. Please ensure you make these changes in your MDM group(s) for RAIL locomotives to ensure proper operations continue as planned on 12/21/2023. Your final settings for RAIL should match the below chart after this date/time.

Again the changes are to:

- Add I-ETMS 6.3.23.3

Comment

+ Select File(s) Upload Files Drag and Drop Files Here 1 of 1

| File Name | Size | Uploaded | Uploaded By | Owner Railroad | Status |
|-----------------------------|--------|---------------------|-------------|----------------|----------|
| Additional Instructions.pdf | 215868 | 12/20/2023 14:44:07 | CARYDOC | UP | UPLOADED |

Cancel Create Task(s)

You could use this feature to copy a task and create a similar task for one or more additional railroads. Comments are not copied to the new task, but supplemental materials are copied.

Make the necessary changes and select **Create Task(s)**.

Editing Task Details

Select **Edit Task Details** from the Task Details page to modify the details of an existing task ([Exhibit 20](#)).

Exhibit 20. Edit Task Details Page

Edit Task for: 2870

Module:
Change Management

Request:
ICR-4290 - New Permissible Version

| ICI Name: | Version of Affected ICI(s): |
|----------------|-----------------------------|
| Christy Test | 5.0 |
| Christy Test 2 | 6.0 |

Assigned Company:
CSX

Task Title *
Generic

Task Deadline *
12/22/2023

Task Plan Description *

On Thursday December 21, 2023, between 11:00 – 11:30AM ET, RAILINC will add I-ETMS software version 6.3.23.3 and its associated Railroad Config v4a.1.0 to our RAIL locomotive group in BOS. Please ensure you make these changes in your MDM group(s) for RAIL locomotives to ensure proper operations continue as planned on 12/21/2023. Your final settings for RAIL should match the below chart after this date/time.

Again the changes are to:

- Add I-ETMS 6.3.23.3

Cancel Save

You could use this feature to modify the title or description of a task or extend the task deadline. You cannot change the assigned company, modify comments, or modify supplemental materials.

Make the necessary changes and select **Save**.

Viewing the Task Activity Log

You can select **View Activity** to display the Task Activity Logs Information popup, which lists the changes that have been made to the task ([Exhibit 21](#)).

Exhibit 21. Task Activity Logs Information Popup

Task 2684 Activity Logs Information

Export To CSV


Number of Logs: 2 of 2

Clear Filters

| Action | Status | Action Description | Action Mark | User | Modified Date/Time |
|------------------------|---------|---|-------------|------|--------------------|
| ICR Task Status Change | Pending | Task ID 2684 received a status change from Pending to In Progress | UP | | |
| ICR Task Creation | Pending | Task ID 2684 was created from ICR 4251 | WAMX | | |

Close

You can select **Export To CSV** to save the contents of the Task Activity Logs Information popup to a CSV file. Select **Close** to exit the popup and return to the Task Details page.

Select **Tasks** in the gray bar at the top of the Task Details page or select the Task icon () from the ILM framework toolbar on the left to return to the Tasks Dashboard, where you can continue to view the lists of tasks assigned to your company and tasks assigned by your company.

Cancelling Tasks

Select **Cancel Task** from the Task Details page to cancel a task ([Exhibit 22](#)).

Exhibit 22. Cancel Tasks Popup

Cancel Tasks

Are you sure you want to cancel this task?

Comments

No

Yes

Note: You can only cancel tasks that are in “Pending” or “In Progress” status.

You can use this feature to cancel a task if it is no longer needed. You can enter a comment to describe the reason for cancelling the task. Comments are displayed on the Task Details page.

Managing Tasks Assigned by Your Company

Select the “Assigned By My Company” tab on the Tasks Dashboard to see a list of all the tasks assigned by your company that are in “Pending” or “In Progress” status.

Note: You can select the **Display Closed and Cancelled Tasks** toggle to also display tasks assigned by your company that are in “Closed” or “Cancelled” status ([Exhibit 23](#)).

Exhibit 23. Tasks Dashboard Showing the Assigned By My Company Tab

| ID | Assigner | Assigned | Last Comment | Modified Date Time | Module | Type | ICI/ICDI/PISR | Version | Task Status | Closure Status | Task Deadline | Created Date |
|--------------------------|----------|----------|------------------|--------------------|-------------------|------|--|-----------------------------|-------------|----------------|---------------|------------------|
| <input type="checkbox"/> | | | | | | | | | | | | |
| 1811 | SDRX | AMTK | 02/14/2025 12:47 | | Change Management | ICR | ITC: I-ETMS PTC Human Fac... AAR: S-YYYY I-ETMS Loggin... WRE: I-ETMS Onboard Softw... | 4.2 WRE 1.15 6.3.24.7 | Pendi... | | 02/22/2025 | 02/14/2025 12... |
| 1810 | MNRX | AMTK | 02/14/2025 12:47 | | Change Management | ICR | ITC: I-ETMS PTC Human Fac... AAR: S-YYYY I-ETMS Loggin... WRE: I-ETMS Onboard Softw... | 4.2 WRE 1.15 6.3.24.7 | Pendi... | | 02/22/2025 | 02/14/2025 12... |
| 1809 | BNSF | AMTK | 02/14/2025 12:47 | | Change Management | ICR | WRE: I-ETMS Onboard Softw... ITC: I-ETMS PTC Human Fac... AAR: S-YYYY I-ETMS Loggin... | 6.3.24.7 4.2 WRE 1.15 | Pendi... | | 02/22/2025 | 02/14/2025 12... |

The “Assigned By My Company” tab contains the same functionality and columns of information as the “Assigned To My Company” tab (see [Exhibit 13](#)), but also contains the following additional functions:

- Checkboxes to the left of the ID

Select a checkbox or multiple checkboxes to mark the selected tasks for cancellation. Select the checkbox at the top to select all checkboxes. Checkboxes are only displayed for tasks that are in “Pending” or “In Progress” status.
- Cancel Tasks button

Select this button to cancel tasks created by your company that have been marked for cancellation. You can select multiple “Pending” or “In Progress” tasks and then select the **Cancel Tasks** button to cancel them and apply the same comment to all.

Creating Tasks

Tasks can be created from within the Change Management, Configuration Management, and Release Management modules.

Note: The process is similar for each module, but only the Interoperable Change Manager can create tasks using the Configuration Management and Release Management modules.

Use the following process to create tasks from the Change Management module:

1. Open the Change Management module. The Change Management Dashboard is displayed ([Exhibit 24](#)).

Exhibit 24. Change Management Dashboard

| Advanced Search | | | | | | | | | |
|--|-----------------------------------|------------------------------------|-----------------|------|------------|-------|------------------------|-------------------|--------------------------|
| <div> <div>Search Results</div> <div>Action Required Responses</div> <div>Action Required Approvals</div> <div>Active Requests</div> <div>My Response History</div> </div> | | | | | | | | | |
| <div> <div>Not Applicable</div> <div>Number of Action Required Responses: 6 of 6</div> <div>Clear Filters</div> <div>Download</div> <div>Refresh</div> </div> | | | | | | | | | |
| Actions | ICI(s)/ICDI | Version(s) of Affected ICI(s)/ICDI | Type | ICRs | IDRs | SIDRs | Requesting Railroad(s) | Current Status | Response Due Date |
| <input type="checkbox"/> Add Response | Christy Test 2 | 6.1 | New Permissi... | 4298 | | | ACEX | Business Appro... | 12/14/2023 |
| <input type="checkbox"/> Add Response | Christy Test | 5.0 | New Permissi... | 4290 | | | BRC | Business Appro... | 12/06/2023 |
| <input type="checkbox"/> Add Response | Christy Test 2 | 6.0 | | | | | | | |
| <input type="checkbox"/> Add Response | Christy Test | CK Test | New Permissi... | 4276 | | | BNSF | Business Appro... | 11/28/2023 |
| <input type="checkbox"/> Add Response | Christy Test | v5.0 | Deployment | | 4301, 4291 | | AMTK, AUT | Deployment A... | Click Add Response fo... |
| <input type="checkbox"/> Add Response | AAR: S-9058 ITC Ticket Managem... | N/A | Decommissio... | 4280 | | | ACEX | Deployment A... | Click Add Response fo... |
| <input type="checkbox"/> Add Response | Back Office Software | christy is testi... | | | | 4282 | TESX | Deployment A... | 12/05/2023 |

2. Select the link for the **ICR**, **IDR**, or **SIDR** for which you want to create a task. The View ICR page is displayed ([Exhibit 25](#)).

Note: In the Configuration Management module, you would select a link for an ICI to create a task. In the Release Management module, simply select **Create Task(s)**.

Exhibit 25. Change Management View ICR General Information Tab

ICR 4290

Business Approval-Pending

ICR Closed

General Information

Railroad Responses

Advancements

Supplemental Materials

Railroad Approvals

View Activity

Create Task(s)

Task(s)

ICR Type:

New Permissible Version

Expedited Flag:

False

Proposed ICR Summary:

test

Current Status:

Business Approval-Pending

Created Date/Time:

11/29/2023 11:02:32

Request for Amendment:

No

Modified Date/Time:

11/29/2023 12:11:24

| ICI Name | Version(s) of Affected ICI(s) | Compatible Version(s) per Vendor | Is ICI(s) Version(s) Released | Limited Scope Railroad(s) |
|----------------|-------------------------------|----------------------------------|-------------------------------|--|
| Christy Test | 5.0 | | No | AMTK, AUT, GDLK, KAW, LBWR, METX, SKOL, SLWC, TESX, UP, WAMX, WSOR |
| Christy Test 2 | 6.0 | | No | |

- On the General Information tab, select the **Create Task(s)** button. The Create Task(s) popup is displayed ([Exhibit 26](#)).

Exhibit 26. Change Management Create Task(s) Popup

Create Task(s): ICR 4290 - New Permissible Version

Assigner Railroad: UP

| ICI Name: | Version(s) of Affected ICI(s): |
|----------------|--------------------------------|
| Christy Test | 5.0 |
| Christy Test 2 | 6.0 |

Assigned Railroad(s)
ALL SELECTED

Task Title *

Task Deadline *

Task Plan Description *

Comments

+ Select File(s)

Upload Files

Drag and Drop Files Here

0 of 0

| File Name | Size | Uploaded | Uploaded By | Owner Railroad | Status |
|-----------------|------|----------|-------------|----------------|--------|
| No Rows To Show | | | | | |

Cancel

Create Task(s)

- Select the **Assigned Railroad(s)** drop-down. The Railroad Selector popup is displayed ([Exhibit 27](#)).

Exhibit 27. Railroad Selector Popup

Railroad Selector

My Railroads Lists

☒ Select All

☒ ACE RAIL

☒ AMTRAK

☒ BNSF

☒ MINNESOTA NORTHSTAR RAILROAD

☒ SOUND TRANSIT

☒ BRC

☒ CALTRAIN

☒ CANADIAN PACIFIC

☒ CARLOAD EXPRESS

☒ ALLEGHENY VALLEY RAILROAD

☒ CENTRAL FLORIDA RAIL CORRIDOR

☒ CN

☒ CONRAIL

☒ CSX

☒ FORT WORTH AND WESTERN

☒ GENESEE AND WYOMING

☒ ALABAMA & GULF COAST RAILWAY

☒ ARKANSAS MIDLAND RAILROAD

☒ ARIZONA EASTERN RAILWAY

☒ BERKSHIRE & EASTERN RAILROAD

☒ CALIFORNIA NORTHERN RAILROAD

☒ CENTRAL OREGON & PACIFIC

☒ DALLAS GARLAND & NORTHEASTERN RAILROAD

☒ INDIANA & OHIO

☒ KENTUCKY & WESTERN TENNESSEE

☒ LOUISIANA & DELTA RAILROAD

☒ LITTLE ROCK & WESTERN RAILWAY

☒ MISSOURI & NORTHERN ARKANSAS RR

☒ PORTLAND AND WESTERN RAILROAD

☒ TEXAS NORTHEASTERN RAILROAD

☒ TOLEDO, PEORIA & WESTERN

☒ UTAH RAILWAY

☒ HERZOG

☒ IOWA INTERSTATE

☒ KANSAS CITY TERMINAL

☒ KCS

☒ MARC

☒ METRA

Cancel **Apply Selections**

5. By default, all the railroads are selected. Select **Select All** to uncheck all the railroads. Then choose the railroads to which you want to assign tasks, and select the **Apply Selections** button. The Create Task(s) popup is redisplayed.
6. Select the **Task Title** drop-down and choose a title from the list.
7. In the **Task Deadline** field, select the calendar icon and choose a date for the task to be closed by.
8. In the **Task Plan Description** field, type a description of the task. You can use rich text formatting to create bullets, add highlighting, and other formatting as needed.
9. Optionally, in the **Comments** field, you can add additional information.
10. Optionally, you can select **Select File(s)** to attach files to the task. Once you select files, they are queued. Select **Upload Files** to upload the queued files.

[Exhibit 28](#) shows an example of a completed Create Task(s) popup.

Exhibit 28. Completed Create Task(s) Popup

Create Task(s): ICR 4290 - New Permissible Version

Assigner Railroad: UP

| ICI Name: | Version(s) of Affected ICI(s): |
|----------------|--------------------------------|
| Christy Test | 5.0 |
| Christy Test 2 | 6.0 |

Assigned Railroad(s)
BNSF (+ 2 other)

Task Title *
Generic

Task Deadline *
12/22/2023

Task Plan Description *

On Thursday December 21, 2023, between 11:00 – 11:30AM ET, RAILINC will add I-ETMS software version 6.3.23.3 and its associated Railroad Config v4a.1.0 to our RAIL locomotive group in BOS. Please ensure you make these changes in your MDM group(s) for RAIL locomotives to ensure proper operations continue as planned on 12/21/2023. Your final settings for RAIL should match the below chart after this date/time.

Again the changes are to:

- Add I-ETMS 6.3.23.3

Comments

Please contact csc@railinc.com if you have any questions.

+ Select File(s) Upload Files Drag and Drop Files Here 1 of 1

| File Name | Size | Uploaded | Uploaded By | Owner Railroad | Status |
|-----------------------------|--------|---------------------|-------------|----------------|----------|
| Additional Instructions.pdf | 215868 | 12/20/2023 14:40:38 | CARYDOC | UP | UPLOADED |

Cancel Create Task(s)

11. Select **Create Task(s)** to create the task(s). The task(s) are created for the railroads you selected. The Change Management View ICR Page is redisplayed, and a success message is displayed at the top right ([Exhibit 29](#)).

Exhibit 29. Change Management View ICR with Success Message

RAILINC PTC Interoperable Lifecycle Management Getting Started Guide

Task ID(s) 2868,2869,2870 created successfully.

ICR 4290 Business Approval-Pending ICR Closed

General Information Railroad Responses Advancements Supplemental Materials Railroad Approvals

View Activity + Create Task(s) Task(s)

ICR Type: New Permissible Version

Expedited Flag: False

Proposed ICR Summary: test

Current Status: Business Approval-Pending

Created Date/Time: 11/29/2023 11:02:32

Request for Amendment: No

Modified Date/Time: 11/29/2023 12:11:24

| ICI Name | Version(s) of Affected ICI(s) | Compatible Version(s) per Vendor | Is ICI(s) Version(s) Released | Limited Scope Railroad(s) |
|----------------|-------------------------------|----------------------------------|-------------------------------|--|
| Christy Test | 5.0 | | No | AMTK, AUT, GDLK, KAW, LBWR, METX, SKDL, SLWC, TESS, UP, WAMX, WSCR |
| Christy Test 2 | 6.0 | | No | |

After the task is created, you can select the **Task(s)** button to view the tasks associated with the ICR. The Task(s) popup is displayed, including the newly created tasks ([Exhibit 30](#)).

Exhibit 30. Task(s) Popup

Task(s) for ICR 4290

Number of Task(s): 8

| Task ID | Assigner Railroad | Assigned Railroad | Current Status |
|----------------------|-------------------|-------------------|----------------|
| 2870 | UNION PACIFIC | CSX | Pending |
| 2869 | UNION PACIFIC | CN | Pending |
| 2868 | UNION PACIFIC | BNSF | Pending |
| 2866 | UNION PACIFIC | BNSF | Pending |
| 2865 | UNION PACIFIC | NORFOLK SOUTHERN | Pending |
| 2864 | UNION PACIFIC | MXV RAIL | Pending |
| 2863 | UNION PACIFIC | METRA | Pending |
| 2862 | UNION PACIFIC | CANADIAN PACIFIC | Pending |

Close

You can select a Task ID link to go to the Task Details page in the Tasks module to view and manage the selected task (see [Viewing Task Details](#) on page 17).

- If you represent the Assigned Railroad, follow the steps in [Managing Tasks Assigned to Your Company](#) on page 15).
- If you represent the Assigner Railroad, follow the steps in [Managing Tasks Assigned by Your Company](#) on page 25).

Working with the System Activity Logs

PTC ILM maintains records of user activity, including what activity was performed, which user performed the activity, and the date and time of the activity. The System Activity Logs module enables you to search and view these records of user activity.



To access the System Activity Logs module, select the System Activity Logs icon  from the ILM Application Suite page (or select the  icon from the ILM framework). The System Activity Logs page is displayed ([Exhibit 31](#)).

Exhibit 31. System Activity Logs Page

System Activity Log Search

Railroad User ID

From Date

From Time

ILM Module

To Date

To Time

Clear

Reset

Search

System Activity Logs Information

Export To CSV

Number of Logs: 2 of 2

Clear Filters

| Action | Status | Action Description | Action Mark | User | Modified Date/Time |
|---------------------|-----------------------------|---|-------------|---------|---------------------|
| SIDR Response added | Deployment Approval-Pending | Railroad 'RAIL' Responded to SIDR# '2598' | RAIL | CKBNTST | 02/22/2023 09:25:20 |
| SIDR Created | Deployment Approval-Pending | New SIDR #2598' Created | RAIL | CKBNTST | 02/22/2023 09:25:20 |

Close

The System Activity Logs page consists of the collapsible System Activity Log Search box and the System Activity Logs Information section (which contains the grid). By default, the grid displays any action taken on the current date by any user or by the PTC ILM system. The number of logs displayed is indicated at the top right of the grid. You can search for specific results by completing fields in the System Activity Log Search box (see [Searching for Specific Information](#) on page 32) and export search results to a CSV file (see [Exporting Search Results](#) on page 33).

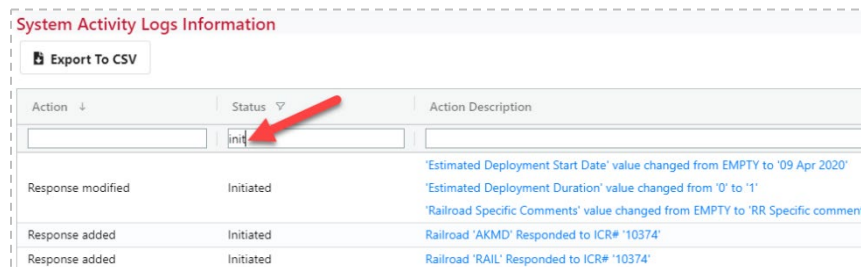
To see all the rows in the grid, use the vertical scroll bar. Use the horizontal scroll bar to view any data that exceeds the width of the viewable area.

You can sort the displayed information by column in ascending or descending order. Simply select the column heading for the column you want to sort. An arrow (↑ or ↓) is displayed next to the heading to indicate the sort order. Select the column heading again to switch the sort order.

You can filter the information displayed in the grid to only show rows containing information you need to see. Each column contains a filter field directly below the column heading.

To apply a filter to a column, type a word or phrase in a column's filter field that you want to see in the results. The displayed results are narrowed to only show rows that contain the filtered word or phrase. A filter icon (▼) is displayed in the column heading to remind you about the filter ([Exhibit 32](#)).

Exhibit 32. System Activity Logs Information with Column Filter Example



The screenshot shows a table titled "System Activity Logs Information" with an "Export To CSV" button. The table has three columns: "Action", "Status", and "Action Description". The "Status" column has a filter icon (▼) and a filter field containing the text "init". A red arrow points to the filter field. The table contains three rows of data:

| Action | Status | Action Description |
|-------------------|-----------|--|
| Response modified | Initiated | 'Estimated Deployment Start Date' value changed from EMPTY to '09 Apr 2020' 'Estimated Deployment Duration' value changed from '0' to '1' 'Railroad Specific Comments' value changed from EMPTY to 'RR Specific comment' |
| Response added | Initiated | Railroad 'AKMD' Responded to ICR# '10374' |
| Response added | Initiated | Railroad 'RAIL' Responded to ICR# '10374' |

Tip: You can apply filters to multiple columns at once.

To remove filters, select the **Clear Filters** button or delete the characters from the filter field.

Note: Any changes you make to the grid using sorting or filters are reflected if the data is exported.

Searching for Specific Information

The System Activity Log Search box at the top of the System Activity Logs page enables you to enter and apply search criteria to locate specific information in the System Activity Logs. You can display and hide this box by selecting the ▼ and ▲ icons at the top right.

Examples:

- To search for activity by a specific known user ID, select the **Railroad User ID** drop-down list and then select the appropriate user ID.
- To search for activity in a specific ILM module, select the **ILM Module** drop-down list and then select the appropriate module.
- To search for ICRs within a specific date range, use the calendar tool to select dates in the **From Date** and the **To Date** fields.
- To search for ICRs within a specific time period, first select a date range and then use the clock tool to select a time period in the **From Time** and the **To Time** fields.

Once you have entered the appropriate search criteria, select **Search** to display the results in the grid below.

Select **Clear** to remove the search criteria you entered. To return all fields to their default settings, select **Reset**.

Exporting Search Results

You can export the information displayed in the grid to a Comma Separated Value (CSV) file, which can then be opened in a spreadsheet application.

Once you have the information you want to export displayed in the grid, select the **Export to CSV** button to download the grid contents to a CSV file ([Exhibit 33](#)).

Exhibit 33. System Activity Logs Filtered for Exporting Data

| System Activity Logs Information | | | | | | |
|----------------------------------|-----------|--|-------------|---------|--------------------------|--|
| Export To CSV | | Number of Logs: 6 of 51 | | | Clear Filters | |
| Action | Status | Action Description | Action Mark | User | Modified Date/Time (CST) | |
| ICI Version information Added | Confirmed | New Version 2.7 added to ICI MCC: Wayside Radio Software | RAIL | sdhww09 | 01/10/2020 12:21:35 | |
| ICI Audit created | Confirmed | [WATC] completed audit for [MCC: Wayside Radio Software] with Audit status as [Confirmed] on [01/02/2020] | TESX | TESXPTC | 01/02/2020 09:17:28 | |
| ICI Audit created | Confirmed | [WATC] completed audit for [MCC: Locomotive Radio Software] with Audit status as [Confirmed] on [01/02/2020] | TESX | TESXPTC | 01/02/2020 09:17:28 | |
| ICI Audit created | Confirmed | [WATC] completed audit for [MCC: Locomotive Messaging Server Software] with Audit status as [Confirmed] on [01/02/2020] | TESX | TESXPTC | 01/02/2020 09:17:28 | |
| ICI Audit created | Confirmed | [WATC] completed audit for [MCC: Base Station Radio Software] with Audit status as [Confirmed] on [01/02/2020] | TESX | TESXPTC | 01/02/2020 09:17:28 | |
| ICI Audit created | Confirmed | [WATC] completed audit for [MCC: Back Office Messaging Server Software] with Audit status as [Confirmed] on [01/02/2020] | TESX | TESXPTC | 01/02/2020 09:17:28 | |

Note: Any changes that you make to the grid using sorting or filters are reflected in the export.

Once the results are exported to a CSV file, you can then view them in a spreadsheet application ([Exhibit 34](#)).

Exhibit 34. Exported System Activity Logs in a Spreadsheet

| | A | B | C | D | E | F | G |
|---|-------------------------------|-----------|--|-------------|---------|--------------------------|---|
| 1 | Action | Status | Action Description | Action Mark | User | Modified Date/Time (CST) | |
| 2 | ICI Version information Added | Confirmed | New Version 2.7 added to ICI MCC: Wayside Radio Softw | RAIL | sdhww09 | 1/10/2020 12:21 | |
| 3 | ICI Audit created | Confirmed | [WATC] completed audit for [MCC: Wayside Radio Softw | TESX | TESXPTC | 1/2/2020 9:17 | |
| 4 | ICI Audit created | Confirmed | [WATC] completed audit for [MCC: Locomotive Radio Sof | TESX | TESXPTC | 1/2/2020 9:17 | |
| 5 | ICI Audit created | Confirmed | [WATC] completed audit for [MCC: Locomotive Messagin | TESX | TESXPTC | 1/2/2020 9:17 | |
| 6 | ICI Audit created | Confirmed | [WATC] completed audit for [MCC: Base Station Radio So | TESX | TESXPTC | 1/2/2020 9:17 | |
| 7 | ICI Audit created | Confirmed | [WATC] completed audit for [MCC: Back Office Messaging | TESX | TESXPTC | 1/2/2020 9:17 | |
| 8 | | | | | | | |

Working with Reports

The ILM Reports module provides access to a set of reports that enable you to view and analyze information about ICIs and versions throughout the system. It also enables you to create custom reports.

Note: The ILM Reports module requires the ILM Reports role.

Using the ILM Reports



To access the Reports module, select the Reports icon  from the ILM Application Suite page (or select the  icon from the ILM framework). The Reports module opens and displays the ILM Reports page – the PISR Compliance/Non-Compliance Report is displayed by default ([Exhibit 35](#)).

Exhibit 35. ILM Reports – PISR Compliance/Non-Compliance Report Example

The screenshot shows the ILM Reports interface. At the top, there's a 'Select Report' dropdown menu with 'PISR Compliance/Non-Compliance Report' selected. Below this is a 'Main' tab and a 'Report' tab. The 'Report' tab is active, showing a table of report data. The table has columns for ICI Category, Config Item Name, ICI Type, and various compliance status columns. A 'Menu options' dropdown is visible, and a 'Release Version' dropdown is on the right. Red callouts provide instructions: 'Select the Report tab to generate a paginated report that you can export as a PDF.', 'Select this tool to access a menu for printing and/or generating PDFs.', 'Select within the data area to see this menu. Then, select the vertical ellipsis to export.', and 'Use this drop-down to filter by mark.'

The PISR Compliance/Non-Compliance report is displayed by default. Use the **Select Report** drop-down to select a different report.

The following reports are available:

- PISR Compliance/Non-Compliance Report – shows the ICIs and permissible versions within the current active PISR and which railroads are in compliance, or not, with those versions (see [Exhibit 35](#)).
- FRA Report – shows current deployed versions for a specific list of ICIs that can be provided to the FRA for review (see [Exhibit 36](#)).
- ICI Relationships – shows which ICIs have relationships with other ICIs (see [Exhibit 37](#)).

Working with Reports

- ICI Attributes Dashboard – shows all the attributes of all the ICIs (see [Exhibit 38](#)). You can select an ICI and view any relationships with other ICIs.
- ICI Versions – shows which railroads are working with which ICIs, the versions they are using, and their deployment status (see [Exhibit 39](#)).

Each report contains filters on the right side of the page, which enable you to drill down to the information you need.

Exhibit 36. FRA Report

| Main Report | | | | | |
|------------------------------|-------------------------------|--|------------------------------|---|--|
| March 07, 2024 FRA Report | | | | | |
| Road Mark | Well Known Name | WRE: I-ETMS Common Configuration Items | WRE: I-ETMS Onboard Software | WRE: WCR-SAF-1369 Hazard Log (front words) [HL] | WRE: WCR-SAF-1370 Hazard Log (hazard table) [HL] |
| ACEX | ACE RAIL | 5a.0.0 | 6.3.24.5 | Rev Q | Table 54d |
| AGR | ALABAMA & GULF COAST RAILWAY | 5a.0.0 | 6.3.24.5 | N/A | N/A |
| AVR | ALLEGHENY VALLEY RAILROAD | 5.1.0 | 6.3.24.5 | Rev Q | Table 54c |
| AMTK | AMTRAK | 5a.0.0 | 6.3.24.1 | Rev Q | Table 54c |
| AZER | ARIZONA EASTERN RAILWAY | 5a.0.0 | 6.3.24.5 | N/A | N/A |
| AKMD | ARKANSAS MIDLAND RAILROAD | 5a.0.0 | 6.3.24.5 | N/A | N/A |
| AUT | AUTAUGA NORTHERN RAILROAD | 5a.0.0 | 6.3.24.5 | N/A | N/A |
| BERX | BERKSHIRE & EASTERN RAILROAD | 5a.0.0 | 6.3.24.5 | N/A | N/A |
| BNSF | BNSF | 5a.0.0 | 6.3.24.1 | Rev Q | Table 54c |
| BRC | BRC | N/A | N/A | Rev Q | Table 54c |
| CFNR | CALIFORNIA NORTHERN RAILROAD | 5a.0.0 | 6.3.24.5 | N/A | N/A |
| JPBX | CALTRAIN | 5.1.0, 5a.0.0 | 6.3.24.2 | Rev Q | Table 54c |
| CPRS | CANADIAN PACIFIC | 5a.0.0 | 6.3.24.1, 6.3.24.5 | Rev Q | Table 54c |
| CFR | CENTRAL FLORIDA RAIL CORRIDOR | 5.1.0, 5a.0.0 | 6.3.24.3 | Rev Q | Table 54c |
| CORP | CENTRAL OREGON & PACIFIC | 5a.0.0 | 6.3.24.5 | N/A | N/A |
| CRL | CHICAGO RAIL LINK | 5a.0.0 | 6.3.24.5 | N/A | N/A |
| CN | CN | 5a.0.0 | 6.3.24.3, 6.3.24.5 | Rev Q | Table 54d |
| CRCX | CONRAIL | 5.1.0, 5a.0.0 | 6.3.24.1, 6.3.24.2 | Rev Q | Table 54c |
| CSXT | CSX | 5a.0.0 | 6.3.24.3, 6.3.24.5 | Rev Q | Table 54d |

Exhibit 37. ICI Relationships Report

| Main Report | | | | | |
|--|--------------------------|--|---------------------|--------------------|-----------------------|
| ICI Relationships | | | | | |
| ICI Name | Relationship Description | Related ICI Name | Modified Time Stamp | item_name | |
| AAR: M-9155 Locomotive Command and Control Module (LCCM) - Functional Requirements | interfaces with | AAR: M-9453 System Management Asset User Interface Requirements | 02/14/2024 | All | |
| AAR: M-9453 System Management Asset User Interface Requirements | is interchangeable with | WRE: I-ETMS Onboard Software | 02/14/2024 | affected_item_name | |
| AAR: S-9058 ITC Ticket Management Requirements and Use Cases | interfaces with | AAR: M-9155 Locomotive Command and Control Module (LCCM) - Functional Requirements | 02/14/2024 | All | |
| MCC: Base Station Radio Software | is specification for | WRE: I-ETMS Onboard Software | 02/13/2024 | description | |
| MCC: Locomotive Radio Software | is dependent on | MCC: Locomotive Radio Software | 02/13/2024 | All | |
| WRE: I-ETMS Onboard Software | has a dependent of | MCC: Base Station Radio Software | 02/13/2024 | Timestamp | 01/31/2020 09/20/2022 |
| | has a dependent of | WRE: WCR-SAF-1369 Hazard Log (front words) [HL] | 02/13/2024 | | |
| | is dependent on | WRE: WCR-SAF-1360 Office Segment Subsystem Hazard Analysis [SSHA - Office] | 02/13/2024 | | |
| | | WRE: WCR-SAF-1370 Hazard Log (hazard table) [HL] | 09/20/2022 | | |
| | is interchangeable with | AAR: M-9155 Locomotive Command and Control Module (LCCM) - Functional Requirements | 02/14/2024 | | |
| WRE: WCR-SAF-1360 Office Segment Subsystem Hazard Analysis [SSHA - Office] | is specified by | AAR: S-9058 ITC Ticket Management Requirements and Use Cases | 02/13/2024 | | |
| WRE: WCR-SAF-1369 Hazard Log (front words) [HL] | has a dependent of | WRE: I-ETMS Onboard Software | 02/13/2024 | | |
| WRE: WCR-SAF-1370 Hazard Log (hazard table) [HL] | is dependent on | WRE: I-ETMS Onboard Software | 02/13/2024 | | |
| | has a dependent of | WRE: I-ETMS Onboard Software | 09/20/2022 | | |

Exhibit 38. ICI Attributes Report

| ICI Attributes | | | | | |
|--|-------------------------|-------------|-----------|---------------|---|
| Config Item Name | Category Code | Status Code | Type Code | Limited Scope | |
| AAR: M-9453 System Management Asset User Interface Requirements | AAR Published Standards | R | Standard | No | <div>Config Item Name</div> <div>AAR: M-9453 System M...</div> <div>Category Code</div> <div>All</div> <div>Status Code</div> <div>All</div> <div>Type Code</div> <div>All</div> <div>Limited Scope</div> <div>All</div> <div>Timestamp</div> <div>01/31/202009/20/2022</div> |
| AAR: RP-9457 Master Test Strategy | AAR Published Standards | Adopted | P | Yes | |
| AAR: RP-9511 Field Survey and Validation Best Practice | AAR Published Standards | Adopted | P | Yes | |
| AAR: S-9001 ITC System Reference Architecture | AAR Published Standards | Adopted | Standard | No | |
| AAR: S-9053 ITC System Requirements - Level 0 | AAR Published Standards | Adopted | Standard | No | |
| AAR: S-9054 ITC System Requirements - Level 1 | AAR Published Standards | Adopted | Standard | No | |
| AAR: S-9055 ITC Comms and Messaging Sys Req - Level 1 | AAR Published Standards | Adopted | Standard | No | |
| AAR: S-9056 Wayside Requirements - Level 1 | AAR Published Standards | Adopted | Standard | Yes | |
| AAR: S-9057 ITC Systems Management Reqs - Level 1 | AAR Published Standards | Adopted | Standard | No | |
| AAR: S-9058 ITC Ticket Management Requirements and Use Cases | AAR Published Standards | Adopted | Standard | Yes | |
| AAR: S-9070 HMI Specifications | AAR Published Standards | Adopted | Standard | Yes | |
| AAR: S-9101A Locomotive Interface Gateway Architecture | AAR Published Standards | R | Standard | No | |
| AAR: S-9101B Locomotive Data Acquisition and Recording System Architecture | AAR Published Standards | Adopted | Standard | Yes | |
| AAR: S-9101C Locomotive Data Acquisition and Recording System (LDARS) - Event Data Acquisition Processor | AAR Published Standards | Adopted | Standard | Yes | |
| AAR: S-9101E Locomotive Systems Integration Communications | AAR Published Standards | Adopted | Standard | Yes | |
| AAR: S-9101G Locomotive Data Acquisition and Recording System (LDARS) - Common File Standard | AAR Published Standards | R | Standard | No | |
| AAR: S-9101 Locomotive Electronics Systems Architecture | AAR Published Standards | Adopted | Standard | Yes | |
| AAR: S-9202A Integrated Wayside Messaging Server Hardware Requirements | AAR Published Standards | Adopted | Standard | Yes | |

Exhibit 39. ICI Versions Report

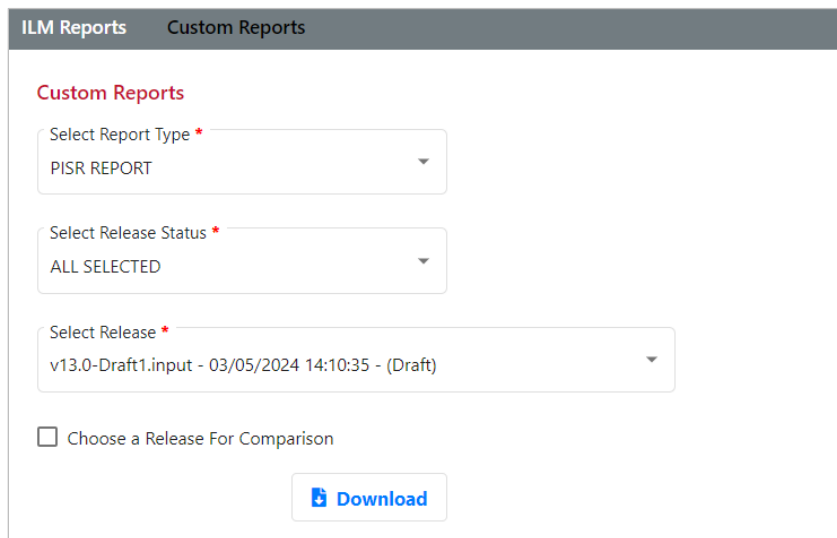
ICI Versions

| Carrier Mark | Config Item Name | Config Item Ver | Ver Type Code | Created TimeStamp | | Config Item Name | |
|--------------|--|--|------------------------|------------------------|---|------------------------|--|
| ACEX | AAR: M-9155 Locomotive Command and Control Module (LCCM) - Functional Requirements | 2.3 | CURRENT_DEPLOYED | 12/09/2021 2:47:05 PM | <div>Config Item Name</div> <div>All</div> <div>Config Item Ver</div> <div>All</div> <div>Carrier Mark</div> <div>All</div> <div>Ver Type Code</div> <div>All</div> | All | |
| | | EMD 2.2 | CURRENT_DECOMMISSIONED | 12/09/2021 2:47:05 PM | | | |
| | | | CURRENT_DEPLOYED | 03/19/2021 5:04:18 PM | | | |
| | AAR: M-9453 System Management Asset User Interface Requirements | 1.0 | CURRENT_DEPLOYED | 03/19/2021 5:04:31 PM | | | |
| | | AAR: RP-9457 Master Test Strategy | 1.0 | CURRENT_DECOMMISSIONED | | 09/28/2023 11:52:49 AM | |
| | AAR: RP-9511 Field Survey and Validation Best Practice | | CURRENT_DEPLOYED | 03/19/2021 5:04:40 PM | | | |
| | | 2.0 | CURRENT_DEPLOYED | 09/28/2023 11:52:49 AM | | | |
| | | 2.0 | CURRENT_DEPLOYED | 03/19/2021 5:04:44 PM | | | |
| | AAR: S-4047 PTC - Locomotive Air Brake Interface Requirements | 1.0 | CURRENT_DEPLOYED | 03/19/2021 5:04:51 PM | | | |
| | | 2.0 | CURRENT_DEPLOYED | 03/01/2024 11:53:03 AM | | | |
| | AAR: S-9001 ITC System Reference Architecture | N/A | CURRENT_DEPLOYED | 03/01/2024 11:42:19 AM | | | |
| | | 1.0 | CURRENT_DEPLOYED | 03/19/2021 5:04:56 PM | | | |
| | | AAR: S-9010 Data Protection | 1.0 | CURRENT_DEPLOYED | 03/19/2021 5:05:00 PM | | |
| | | AAR: S-9053 ITC System Requirements - Level 0 | 2.0 | CURRENT_DEPLOYED | 03/19/2021 5:05:06 PM | | |
| | | AAR: S-9054 ITC System Requirements - Level 1 | 2.0 | CURRENT_DEPLOYED | 03/19/2021 5:05:12 PM | | |
| | | AAR: S-9055 ITC Comms and Messaging Sys Req - Level 1 | 1.0 | CURRENT_DEPLOYED | 03/19/2021 5:05:17 PM | | |
| | | AAR: S-9056 Wayside Requirements - Level 1 | N/A | CURRENT_DEPLOYED | 03/19/2021 5:05:25 PM | | |
| | | AAR: S-9057 ITC Systems Management Reqs - Level 1 | 1.0 | CURRENT_DEPLOYED | 03/19/2021 5:05:31 PM | | |
| | | AAR: S-9058 ITC Ticket Management Requirements and Use Cases | 1.0 | CURRENT_DEPLOYED | 12/09/2021 2:44:06 PM | | |
| | | AAR 1.0 | PROPOSED_DEPLOYED | 03/07/2024 1:23:52 PM | | | |
| | AAR: S-9070 HMI Specifications | ITC 2.4 | CURRENT_DECOMMISSIONED | 12/09/2021 2:44:06 PM | | | |
| | | | CURRENT_DEPLOYED | 03/19/2021 5:03:59 PM | | | |
| | | N/A | CURRENT_DEPLOYED | 02/26/2024 1:06:56 PM | | | |
| | | ITC Rev F | CURRENT_DEPLOYED | 12/09/2021 1:28:22 PM | | | |
| | | WRE Rev F | CURRENT_DECOMMISSIONED | 12/09/2021 1:28:22 PM | | | |
| | AAR: S-9074 Federated Network Requirements | | CURRENT_DEPLOYED | 03/19/2021 5:05:39 PM | | | |
| | | 1.0 | CURRENT_DEPLOYED | 03/19/2021 5:06:39 PM | | | |
| | | ITC 1.0 | NOT_DEPLOYED | 05/25/2022 12:43:26 PM | | | |
| | AAR: S-9075 ISMP Design Considerations | N/A | CURRENT_DEPLOYED | 04/24/2023 4:38:47 PM | | | |

Creating Custom Reports

In addition to using the provided reports, you can create your own reports. Select **Custom Reports** from the menu at the top. The Custom Reports page is displayed ([Exhibit 40](#)).

Exhibit 40. Custom Reports



The screenshot shows the 'Custom Reports' page. At the top, there are two tabs: 'ILM Reports' and 'Custom Reports'. Below the tabs, the page is titled 'Custom Reports'. There are three dropdown menus: 'Select Report Type *' with 'PISR REPORT' selected, 'Select Release Status *' with 'ALL SELECTED' selected, and 'Select Release *' with 'v13.0-Draft1.input - 03/05/2024 14:10:35 - (Draft)' selected. Below these dropdowns is a checkbox labeled 'Choose a Release For Comparison' which is currently unchecked. At the bottom right, there is a blue button with a download icon and the text 'Download'.

The Custom Reports page enables you to create the following types of reports:

- **PISR Report** – shows the ICIs and permissible versions within the selected PTC Interoperable System Release (PISR) and enables you to perform a comparison between two releases.
- **ICAB Attendees/Non-Attendees** – shows the railroads that were in attendance and not in attendance for a specific ICAB meeting.

Creating a Custom PISR Report

Use the following procedure to create a custom PISR report:

1. In the **Select a Report Type** drop-down, choose **PISR Report**.
2. In the **Select Release Status** drop-down, choose **Select All** or select one or more release statuses.
3. In the **Select Release** drop-down, select the release to use for your report.
4. Optionally, check the **Choose a Release For Comparison** checkbox if you want to compare one release to another. If you select this checkbox, a second set of Select Release Status and Select Release drop-down fields is displayed for you to select a release for comparison ([Exhibit 41](#)).

Exhibit 41. Custom Reports Page with Completed PISR Report Fields

The screenshot shows the 'Custom Reports' section of the ILM Reports interface. It includes the following fields:

- Select Report Type ***: PISR REPORT
- Select Release Status ***: Approved
- Select Release ***: v12.0.16.3 - 02/27/2024 10:46:27 - (Approved)
- ☒ **Choose a Release For Comparison**
- Select Release Status ***: Active
- Select Release For Comparison ***: v11.0.60.16 - 03/08/2024 12:45:29 - (Active)
- Download** button

5. Once you have completed all of the fields, select **Download** to generate your report.

The report is generated as an Excel file. Check your Downloads folder to open and view ([Exhibit 42](#)).

Exhibit 42. Custom PISR Report Output

| | A | B | C | D | E | F | G | H | I | J | K |
|---|---------------------------------------|--------------------------------|--------------|-----------------------|-------------------------------|-----------------------------|-------------------|------------------------------|--|--|---|
| | Interoperable Configuration Item Type | Interoperable Compliance Scope | All Releases | Released with Updates | Released with PTC Back Office | Released with 201 MMT scope | Released with MMT | Released Deploying to the IC | Interoperable Configuration Item (ICI) | Permissible Versions Release #12.0 | Comments |
| 1 | | | | | | | | | | | |
| 2 | Software Release | X | | | X | | | | Vendor Proprietary Configuration Items MCC: Back Office Messaging Server Software | 2.0 1.4.8 2.3.3 3.1 2.3.2 3.2 3.3 2.3.4 3.4.0.1 3.5 3.6 3.7 3.8.0 3.9 | MCC recommends moving to 3.1 or later to avoid potential issues. Compliance with version 3.1 or higher will be required by June 1, 2024. Any version before 3.1 will be mandatory decommissioned and removed as permissible versions. |
| 3 | Software Release | X | | | X | | | | MCC: Base Station Radio Software | 2.7 3.2.1 3.3.1 3.1 3.2 3.0 3.3 3.3.2 3.4 3.6 3.7 3.8 | |

Any cells that contain differences between two compared release versions (additions, removals, or comments added) are highlighted in yellow.

Creating a Custom ICAB Attendees Report

Use the following procedure to create a custom ICAB Attendees/Non-Attendees report:

1. In the **Select a Report Type** drop-down, choose **ICAB Attendees/Non-Attendees**.
2. In the **ICAB Date** drop-down, select the ICAB meeting date for which you want to view the attendees and non-attendees.
3. The report is generated, and output is displayed under the report fields ([Exhibit 43](#)).

Exhibit 43. Custom Reports with ICAB Attendees/Non-Attendees Report Output

ILM Reports

Custom Reports

Custom Reports

Select Report Type *

ICAB Attendees/Non-Attendees

ICAB Date *

03/6/2024

Download

| Railroads in Attendance | Railroads Not in Attendance |
|-------------------------|--------------------------------|
| ACE RAIL | AMTRAK |
| METRA | BNSF |
| MXV RAIL | BRC |
| WATCO | CALTRAIN |
| | CANADIAN PACIFIC |
| | CARLOAD EXPRESS |
| | CENTRAL FLORIDA RAIL CORRIDOR |
| | CN |
| | CONRAIL |
| | CSX |
| | FORT WORTH AND WESTERN |
| | GENESEE AND WYOMING |
| | HERZOG |
| | IOWA INTERSTATE |
| | KANSAS CITY TERMINAL |
| | KCS |
| | MARC |
| | METROLINK |
| | NCDOT |
| | NEW MEXICO RAIL RUNNER |
| | NICD |
| | NORFOLK SOUTHERN |
| | NORTH COUNTY TRANSIT DISTRICT |
| | OMNITRAX |
| | PADUCAH AND LOUISVILLE |
| | RED RIVER VALLEY & WESTERN |
| | RIO GRANDE PACIFIC |
| | RJ CORMAN |
| | SOUTH FLORIDA RTA |
| | TACOMA RAIL |
| | TRINITY RAILWAY EXPRESS |
| | TRRA |
| | TWIN CITIES & WESTERN RAILROAD |
| | UNION PACIFIC |
| | VIRGINIA RAILWAY EXPRESS |
| | WHEELING & LAKE ERIE |

4. Optionally, select **Download** to save the report output as an Excel file.