

# Umler® Company Administrators - Getting Started

Presenter: Terry Caulfield

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September 2024

# General Announcements



- Welcome
- Webinar Reminders
  - Attendees will be muted to reduce background noise.
  - Submit any questions you have via the Q&A box.
  - The presentation is expected to last 40 minutes.

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# Webinar Objectives



After this webinar, attendees will be able to:

- Manage users and approve/reject Umler Permission Requests.
- Navigate the Security Management Module.
- Grant Equipment Rights, Inspection Rights and Pool Rights.
- Add / Accept View Confidential Data Rights.
- Review Enhanced Process for Transferring Ownership.
- Manage Umler Ticklers / View Usage Statistics.

# The Benefits of Umler



- The Umler system is a powerful and dynamic tool for tracking the physical characteristics, transportation management and pool assignments of virtually every piece of rail equipment in North America. Umler is the base file for industry reference files and industry equipment accounting files.
- The Umler system gives equipment owners four major benefits:
  - **Access:** The Umler system provides real-time updates via the Web or enhanced "TRAIN II" computer-to-computer electronic messaging.
  - **Security:** Equipment-level security gives users greater control over access to equipment and the display of confidential information.
  - **Data Quality:** High data standards are built into the system through extensive, interactive data validation and pro-active conflict resolution.
  - **Real-Time Updating:** All transactions are processed immediately upon request. Changes made in the Umler system are communicated instantly to the industry, reducing delays and related costs.



# Umler Security



- Umler has two layers of security:
  - Single Sign-On (SSO) Umler Permissions.
  - Umler Security Management Module.
- SSO permissions will control which menu options the user can access.
- Equipment-level security allows owners/agents greater control over access to equipment.
- Users assigned **Umler Company Admin Access** will inherit authority to accept/reject permission requests submitted by users and grant user's access rights under a specific company.

# SSO Umler User Permission Roles



☐ Component Maintenance Access ( MARK required )

Ability to Add/Modify/Delete components

☐ Umler Access for Maintenance ( MARK required )

Access to Umler transaction/update functionality. (Including Notice Management)

☐ Umler Access for Query ( MARK required )

Access to Umler Query functionality. (Display Unit, Equipment Query, Car management Query, Transaction Log, Inspection History, Historical Lineage Query, Locomotive Historical Blue Card Query and Equipment Unit Comparison).

☐ Umler Advanced Query Access ( MARK required )

Ability to download data from the Umler system. For some queries, downloading data may incur per record charges.

☐ Umler Bulk Upload ( MARK required )

Upload transactions in CSV format. Upload corrected notices in CSV format.

☐ Umler Company Admin Access ( MARK required )

Qualify as a Company Administrator. Manage SSO permissions and Umler Rights. Configure ticklers.

☐ Umler Manage Future Trans ( MARK required )

Create, view, and delete transactions that the system will process at a specified future date.

☐ Umler Refresh Request Access ( MARK required )

Allows a company to resynchronize its local copy of pool and equipment data following an interruption of messaging or an error occurring at the company site.

# Most Users Need...



## Umler Company Admin Users

- Umler Company Admin Access
- Umler Access for Maintenance
- Umler Access for Query
- Umler Advanced Query Access
- Umler Bulk Upload

## Umler Query-Only Users

- Umler Access for Query
- Umler Advanced Query Access

## Umler Maintenance Users

- Umler Access for Maintenance
- Umler Access for Query
- Umler Advanced Query Access
- Umler Bulk Upload

# Some Users Need...



## Component Maintenance Users

- Component Maintenance Access
- Umler Access for Maintenance
- Umler Access for Query

## Users May Select Every Available Permission

- Component Maintenance Access
- Umler Access for Maintenance
- Umler Access for Query
- Umler Advanced Query Access
- Umler Bulk Upload
- Umler Refresh Request Access (for TRAIN II only)
- Umler Manage Future Trans (not used often)
- Umler CSEG Access (not used often)

Reject any permission request not applicable for user.



# New Umler Company Admin Access Users



- Railinc initially qualifies and grants the **Umler Company Admin Access** only if no previous user(s) has registered with Umler under the company.
- Once **Umler Company Admin Access** has been assigned, the Company Admin is delegated to manage all activities on behalf of the company.
- Umler Company Admins can delegate an alternate Company Admin as needed.
- Umler Company Admins must assign themselves any additional Umler permissions and User Access Rights needed to perform update transactions.
- Umler Company Admins will be responsible to accept/reject permission requests for users under your company.
  - Unanswered permission requests will be rejected by Railinc after 30 days.
- Upon approving **Umler Access for Maintenance** permissions, Umler Company Admins must login Umler, go to Account Administration and under Security Management Administer Access Rights Internal to My Company and grant Equipment and Inspection rights.
- If an agent is interested in becoming the Umler Company Admin, in addition to the LOA, Railinc will require a letter, on the Grantor's company letterhead, authorizing the user to have this unique role.

# Launch Pad

- Umler Company Admins can receive email notifications when a new Umler permission request(s) is received.
- To sign up, go to **Edit My Profile.**



RAILINC | Launch Pad Tracy Brewer (TRAINUS1) : RAILINC CORPORATION

Home

### My Applications

- FLDX Rail Document Interchange
- Rail Document Interchange
- Umler

### Welcome, Tracy Brewer

This is your personalized landing page, your gateway to seamless access to a world of Railinc applications and Single Sign-On services. We're excited to have you on board and want to ensure you make the most of your experience.

**Getting Started:**

To the left, you'll find easy navigation to Railinc applications you have permission to use. Your work becomes efficient and convenient when all your tools are just a click away.

**Profile Management:**

On the right, under the "My Profile" section, you can take control. Update your profile information, change your password, or request permissions for additional applications. It's all at your fingertips.

**Managing Permissions:**

You can manage your existing permissions and permission requests right here. If you're a company admin, you also have the power to handle permission requests from other users in this section.

**New User? Start Here:**

If this is your first visit, begin by requesting access to the Railinc applications that align with your needs. It's the first step to an enhanced workflow.

**Need Assistance?**

Feeling lost or have questions? The "User Guide" to your right can be your trusted companion in navigating further. Alternatively, our dedicated Customer Success Center is just an email or a phone call away.

- Email: [cso@railinc.com](mailto:cso@railinc.com)
- Phone: 1-877-RAILINC (1-877-724-5462)

Your success is our priority, and we're here to support you every step of the way. Don't hesitate to reach out if you need assistance or have any questions.

Best Regards, The Railinc Team

### My Profile

- Edit My Profile ←
- Change Password
- View/Request Permissions
- Check Status of Permission Requests
- Support Cases
- User Guide

### Permissions

- Manage My Permissions
- Manage User Permissions
- Manage Permission Requests

### Tools

- Advanced User Query
- Find Admin Contacts for Application
- Admin User Guide

# Launch Pad – Edit My Profile



- Sign up to receive email notifications.
- Select button - *To receive permission request emails from registered users for companies that I administer.*
- Select 'Save Profile.'

RAILINC | Launch Pad Tracy Brewer (TRAINUS1)

Home / Edit My Profile

TRACY BREWER ( TRAINUS1 ) ACTIVE

First Name* Tracy 5/25	Country* United States
Last Name* Brewer 6/25	Address * 7001 Weston Pkwy Ste 200 24/40
Business Title* 1968 4/30	Address 2 2 Conder Place 14/40
E mail* Tracy.Brewer@Railinc.com 24/60	City* Cary 4/32
United ... Phone Number* 91965152054 11/26 Extension 0/6	State/Province* North Carolina
Fax Number 0/26 Extension 0/6	Zip/Postal Code* 27703 5/10
Security Question* What is your favorite color?	Security Answer* Red 3/50

For your protection, your security answer will help us verify your identity.

☒ I would like to receive permission request emails from registered single sign on users for companies or applications that I administer.

Cancel Save Profile

# Sign Up for Email Notifications – Manage Permissions Requests



- Email notifications will be sent for all Company Marks when users have **Company Admin Access** for any Railinc applications.

Railinc: Access Request Notification At 06/09/2021 10:10:00 - ACTION REQUIRED



noreply@railinc.com

To: • Brewer, Tracy

Retention Policy: Inbox - Delete older than 90 days (90 days)

If there are problems with how this message is displayed, click here to view it in a web browser.  
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.



| User Services

Hello Tracy Brewer,

The following application access request(s) waiting for your consideration. Please log onto Railinc Single Sign-On Portal to process this request.

## User Information

Name Terry Caulfield

User Id UMLRTST1

Title PS II

Company RAILINC CORPORATION

Email [REDACTED]

Phone 1.9196515000

Reference Number	Application	Permission	Company	Comment
274489	Umler	Umler Access for Maintenance	AARX - TEMPORARY MOVEMENT PERMIT	

If you believe that this email was sent to you in error, or have any questions/concerns, please contact the Railinc Customer Success Center by phone at 1-877-RAILINC (1-877-724-5462) or by email at [csc@railinc.com](mailto:csc@railinc.com)

Thank you,  
Railinc Customer Success Center

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# Launch Pad

- Umler Company Admins can access the Tools section of the Launch Pad to:
  - Query all users that have access for their company
  - Find company Admins for other applications
  - Review the SSO & Launch Pad Administrator Guide



RAILINC | Launch Pad Tracy Brewer (TRAINUS1) : RAILINC CORPORATION

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- Rail Document Interchange
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- Edit My Profile
- Change Password
- View/Request Permissions
- Check Status of Permission Requests
- Support Cases
- User Guide

### Permissions

- Manage My Permissions
- Manage User Permissions
- Manage Permission Requests

### Tools

- Advanced User Query
- Find Admin Contacts for Application
- Admin User Guide




# Launch Pad - Manage Permission Requests

- From Launch Pad, select **'Manage Permission Requests.'**
- All pending permission requests will appear, and if managing multiple Company Marks and/or other applications, narrow your search by entering Umler and/or Company Mark or user name/ID in the filter.

## Permissions

- Manage My Permissions ←
- Manage User Permissions
- Manage Permission Requests
- Clone User Permissions



 Launch Pad

Tracy Brewer (TRAINUS1) - RAILINC CORPORATION | Sign Out

Home / Manage Permission Requests

Filter...

Total Items : 1

<input type="checkbox"/>	Reference	Application	Permission	Mark/Company	User Id	User Name	Request Date	Status	User Comment	End Date
<input type="checkbox"/>	2744...	Umler	Umler Access fo...	 AARX - TE...	 UMLRTST1	Terry Caulfield	2021-06-09	Requested		

Cancel Reject Pending Approve

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# Launch Pad – Approve/Reject Umler Permission Requests



- Use checkbox to select User.
- Then select 'Approve' or 'Reject' Request(s).
- Comments are required if permission request is pended or rejected.
- For approvals, Umler Company Admins have the option to add End Date for permission(s) as appropriate.
  - The Effective Date begins the day the permission request is approved.

Filter...

Total Items : 1

<input checked="" type="checkbox"/>	Reference	Application	Permission	Mark/Company	User Id	User Name	Request Date	Status	User Comment	End Date
<input checked="" type="checkbox"/>	274489	Umler	Umler Access fo...	AARX - TE...	UMLRTST1	Terry Caulfield	2021-06-09	Requested		

Selected Permission Request(s)

274489

Comments...

Required for rejecting permission request(s)

0/255

Cancel Reject Pending **Approve**

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# Managing Multiple Company Marks



- Umler Company Admins may be responsible for managing multiple Company Marks.
- After approving **Umler Access for Maintenance**, Login to Umler to grant the User's Access Rights.
- Select the appropriate Company Mark.
- In this example, **AARX** is the Company Mark to sign in under to grant user access rights.

My Applications

Umler

User Mark Selection

Select a Mark \*

RAIL

AARE

AARX

User Mark Selection

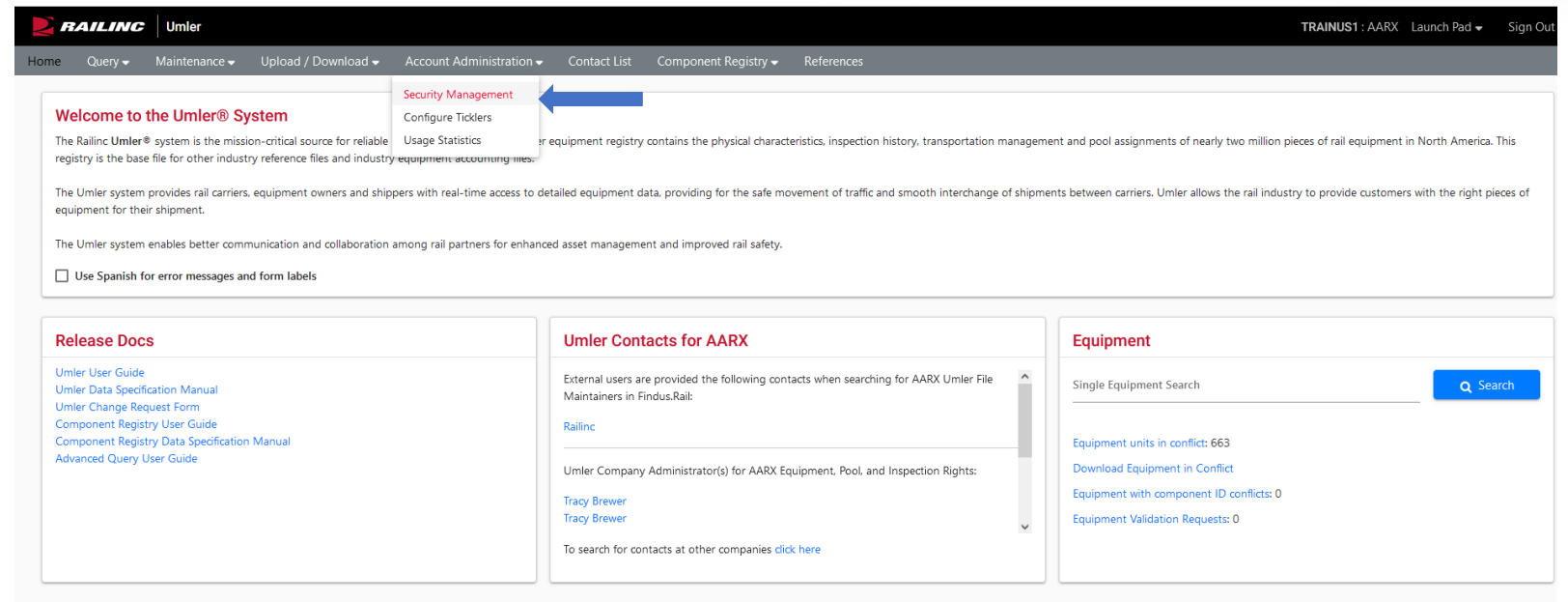
Select a Mark \*

AARX

Select

# Umler Homepage

- To grant users access rights, go to the **Account Administration** menu on the homepage.
- Select 'Security Management' to grant access rights:
  - Equipment Rights
  - Inspection Rights
  - Pool Rights – *for railroads only*



# Security Management



- Go to **Administer Access Rights Internal to My Company**.
  - Select **Manage Intra-Company User Access Rights** to locate authorized users under **AARX**.
    - Each maintenance user must be granted access rights to perform update transactions in Umler.

## Security Management

Welcome to the EMIS Security Management Module. What would you like to do?

### Administer Access Rights Internal to My Company

[View My Access Rights](#)

[Manage Intra-Company User Access Rights](#)

[Manage Security Profiles](#)

[Add/Remove User to/from Security Profiles](#)

### Administer Access Rights Involving Other Companies

[Manage Inter-Company Access Rights / Profiles Granted by My Company](#)

[Manage Inter-Company Access Rights Granted to My Company](#)

[Manage Inter-Company Profiles Granted to My Company](#)

### Search User Access Rights

[Search User Access Rights](#)



# Administer Access Rights – Internal to My Company



- Select the User ID you wish to grant access rights.
- This page identifies the list of Umler Maintenance users for that specific Company Mark.

## Update A User's Access Rights

Select the user to update.

Select	User ID	Name
<input type="radio"/>		
<input type="radio"/>		
<input type="radio"/>		
<input type="radio"/>		
<input type="radio"/>		
<input type="radio"/>		
<input type="radio"/>		
<input type="radio"/>		
<input checked="" type="radio"/>	<a href="#">UMLRTST1</a>	Caulfield Terry

# Update A User's Access Rights



- When this page is blank, the user has no access rights to perform update transactions.
- Umler Maintenance users must be granted:
  - Equipment Access Rights
  - Inspection Access Rights
  - Pool Access Rights – *for railroads only*

## Update A User's Access Rights

Currently editing access rights for security profile: [UMLRTST1](#)

Clear Filters

Select	Company	Effective Date	Expiration Date	Type	Description
No access right(s) available for this company.					



+ Add Pool Right

+ Add Equipment Right

+ Add Inspection Right

Clone Rights from another User

Done

# Add Equipment Access Rights



- Enter the required fields.
  - Step 1 - Type brief Description
  - Step 2 - Select Effective Date as the current date
  - Step 3 - Specify Expiration Date or leave default as 12/31/9999
  - Step 4 - The Range of Equipment is defaulted to All Equipment under the listed SCAC(s).
  - Step 5 - Select the specific **Type of Access** the user needs.

## Equipment Access Right

Currently editing access rights for: [UMLRTST1](#)  
Edit the details of the access right.

Save

Count Equipment

Cancel

### Description of Access Right

Description \*

### Timeframe of Authority

Effective Date \*

Expiration Date \*

12/30/9999

### Range of Equipment

☒ All Equipment:

SCAC(s):

AARX

Initial(s):

AARX

Equipment Group(s):

FLAT  
GOND  
HOPP  
IFLT

Equipment:

### Type of Access

Non-Owner Self-as-Lessee Removal  
Equipment - "Add to Pool"  
Equipment - "Remove from Pool"  
Add Equipment  
Modify Equipment  
Delete Equipment

Save

Count Equipment

Cancel

# Equipment Type of Access



- Select **Type of Access** user needs to perform update transactions.
  - **Add Equipment**
  - **Modify Equipment**
  - **Delete Equipment**
- For railroads only:
  - Non-Owner Self-as-Lessee Removal
  - Equipment – Add to Pool
  - Equipment – Remove from Pool
  - Select ‘Save.’

## Equipment Access Right

Currently editing access rights for: UMLRST1  
Edit the details of the access right.

[Save](#) [Count Equipment](#) [Cancel](#)

### Description of Access Right

Description \*

Equipment Rights - All

### Timeframe of Authority

Effective Date \*

08/01/2024

Expiration Date \*

12/30/9999

### Range of Equipment

☒ All Equipment:

SCAC(s):

AARX

Initial(s):

AARX

Equipment Group(s):

FLAT  
GOND  
HOPP  
IFLT

Equipment:

### Type of Access


Non-Owner Self-as-Lessee Removal  
Equipment - "Add to Pool"  
Equipment - "Remove from Pool"  
Add Equipment  
Modify Equipment  
Delete Equipment

[Save](#) [Count Equipment](#) [Cancel](#)

# Confirmed – User's Access Rights

- Umler Maintenance users also need access to report inspections.
- Select 'Add Inspection Right'.

### Update A User's Access Rights

 Equipment Right added successfully.

Currently editing access rights for security profile: [UMLRTST1](#)

Clear Filters

Select	Company	Effective Date	Expiration Date	Type	Description
<input checked="" type="radio"/>	<a href="#">AARX</a>	08/01/2024	12/30/9999	Equipment	Equipment Rights - All

+ Add Pool Right

+ Add Equipment Right

+ Add Inspection Right

Edit

Delete

Clone Rights from another User

Done






# Add Inspection Access Rights

- Enter the required fields.
  - Step 1- Type brief Description
  - Step 2 - Select Effective Date as the current date
  - Step 3 - Specify the Expiration Date or leave default as 12/31/9999
  - Step 4 – Use default for All Marks and All Inspections or specify.
  - Step 5 – Use default for All Equipment or specify.
- Select 'Save'.

## Inspection Access Right

Currently editing access rights for: UMLRTST1  
Edit the details of the access right.

 Save  Count Equipment  Cancel

### Description of Access Right

Description \*

Inspections Rights - All

### Timeframe of Authority

Effective Date \*

08/01/2024



Expiration Date \*

12/30/9999



### Authorize reporting as the following marks / Authorize reporting for the following inspections

☒ All Marks:

Mark(s):

AARX

☒ All Inspections:

Inspections Types(s):

BRI  
LOA  
FRA  
Report a Car Grade In

### Range of Equipment

☒ All Equipment:

SCAC(s):

AARX

Initial(s):

AARX

Equipment Group(s):

BOXC  
CHSS  
CONT  
EOTD  
FLAT

Equipment:



 Save  Count Equipment  Cancel

# Confirmed – User's Access Rights

- In this example, the AARX Maintenance user now has the appropriate access rights to perform update transactions.

## Update A User's Access Rights

✓ Inspection Right added successfully.

Currently editing access rights for security profile: UMLRTST1

✕ Clear Filters

Select	Company	Effective Date	Expiration Date	Type	Description
<input checked="" type="radio"/>	<a href="#">AARX</a>	08/01/2024	12/30/9999	Equipment	Equipment Rights - All
<input type="radio"/>	<a href="#">AARX</a>	08/01/2024	12/30/9999	Inspection	Inspections Rights - All

+ Add Pool Right

+ Add Equipment Right

+ Add Inspection Right

Edit

Delete

Clone Rights from another User


Done

# Adding Rights for Pool User (Railroads Only)

- Umler Company Admins can also grant Pool Access Rights to maintenance users and specify **Types of Access**
  - Add Pool Header
  - Update Pool Header
  - Delete Pool Header
  - Pool Assignment / Un-assignment
- Select 'Add Pool Right.'

## Update A User's Access Rights

Currently editing access rights for security profile: [UMLRTST1](#)

 Clear Filters


Select	Company	Effective Date	Expiration Date	Type	Description
<input checked="" type="radio"/>	<a href="#">RAIL</a>	09/16/2024	12/30/9999	Equipment	Equipment Rights
<input type="radio"/>	<a href="#">RAIL</a>	09/16/2024	12/30/9999	Inspection	Inspection Rights




+ Add Pool Right


+ Add Equipment Right

+ Add Inspection Right

 Edit

 Delete

 Clone Rights from another User

 Done

# Adding Rights for Pool User (Railroads Only)

- Enter the required fields.
  - Step 1 - Type brief Description'
  - Step 2 - Select Effective Date as the current date
  - Step 3 - Specify Expiration Date or leave default as 12/31/9999
  - Step 4 - Range of Pools is defaulted to All Pools or enter Pool IDs.
  - Step 5 – Select the **Type of Access** the user needs.
- Select 'Save.'

### Pool Access Right

Currently editing access rights for: [UMLRTST1](#)  
Edit the details of the access right.

[Save](#) [Cancel](#)

#### Description of Access Right

Description \*

Pool Rights - RAIL

#### Timeframe of Authority

Effective Date \* 09/16/2024 Expiration Date \* 12/30/9999

#### Range of Pool

☒ All Pools ☐ Pool ID(s)

#### Type of Access

Add a Pool Header  
Update a Pool Header  
Delete a Pool Header  
"Pool Management" - Assignment / Unassignment

[Save](#) [Cancel](#)

### Update A User's Access Rights

✓ Pool Right added successfully.

Currently editing access rights for security profile: [UMLRTST1](#)

Select	Company	Effective Date	Expiration Date	Type	Description
<input checked="" type="radio"/>	<a href="#">RAIL</a>	09/16/2024	12/30/9999	Equipment	Equipment Rights
<input type="radio"/>	<a href="#">RAIL</a>	09/16/2024	12/30/9999	Inspection	Inspection Rights
<input type="radio"/>	<a href="#">RAIL</a>	09/16/2024	12/30/9999	Pool	Pool Rights - RAIL

# Clone Rights from Another User

- When adding user's access rights, Umler Company Admins may choose to select 'Clone Rights from another User.'
- This feature is limited to cloning of all access rights associated with a user and SSO permissions will not be included as part of the cloning.
- Select User ID and then select 'Clone Rights.'

The screenshot displays the 'Update A User's Access Rights' interface. At the top, it indicates 'Currently editing access rights for security profile: TBCTEST'. Below this is a table with columns: Select, Company, Effective Date, Expiration Date, Type, and Description. The table is currently empty, with a message stating 'No access right(s) available for this company.' To the right of the table are three buttons: '+ Add Pool Right', '+ Add Equipment Right', and '+ Add Insp'. A blue arrow points from the '+ Add Insp' button to a button labeled 'Clone Rights from another User'. Below this, the 'Select Access Right Source' section is shown, indicating 'Currently editing access rights for: TBCTEST' and 'Select the user whose access rights will be cloned.' A table lists users, with 'UMLRTST1' and 'Caulfield Terry' selected. A blue arrow points from the 'Clone Rights' button at the bottom right to the 'Clone Rights from another User' button.

Update A User's Access Rights

Currently editing access rights for security profile: TBCTEST

Select	Company	Effective Date	Expiration Date	Type	Description
No access right(s) available for this company.					

+ Add Pool Right + Add Equipment Right + Add Insp

Clone Rights from another User

Select Access Right Source

Currently editing access rights for: TBCTEST

Select the user whose access rights will be cloned.

Select	User ID	User Name
<input checked="" type="radio"/>	UMLRTST1	Caulfield Terry

Clone Rights Cancel



# Confirm Clone Access Rights from Another User




- Select ‘Confirm Clone Rights.’
- The Access Rights are cloned to the desired user.
- Select ‘Done’ to exit the screen.

Confirm Clone Access Rights


Currently editing access rights for security profile: [TBCTEST](#)

Are you sure you want to grant the following access rights ?

Company	Effective Date	Expiration Date	Type	Description
<a href="#">AARX</a>	08/01/2024	12/30/9999	Equipment	Equipment Rights - All
<a href="#">AARX</a>	08/01/2024	12/30/9999	Inspection	Inspections Rights - All

 [Confirm Clone Rights](#)

Update A User's Access Rights

 User access right(s) cloned successfully.

Currently editing access rights for security profile: [UMLRTST1](#)

Select	Company	Effective Date	Expiration Date	Type	Description
<input checked="" type="radio"/>	<a href="#">AARX</a>	08/01/2024	12/30/9999	Equipment	Equipment Rights - All
<input type="radio"/>	<a href="#">AARX</a>	08/01/2024	12/30/9999	Inspection	Inspections Rights - All

# Delete A User's Access Rights



- To delete an existing access right, select 'Delete.'
- Select each Access Right and then select 'Delete.'
- To confirm, select 'Delete.'
- Select 'Done' to exit the screen.

**Update A User's Access Rights**

Currently editing access rights for security profile: UMLRTST1

Clear Filters

Select	Company	Effective Date	Expiration Date	Type	Description
<input checked="" type="radio"/>	AARX	08/01/2024	12/30/9999	Equipment	Equipment Rights - All
<input type="radio"/>	AARX	08/01/2024	12/30/9999	Inspection	Inspections Rights - All

➕ Add Pool Right   ➕ Add Equipment Right   ➕ Add Inspection Right   ✎ Edit   **Delete**   ➡

🔄 Clone Rights from another User   **Done**

**Confirm - Delete an Access Right**

ⓘ Are you sure you want to delete this access right?

Currently editing access rights for security profile: UMLRTST1

**Delete**   **Cancel**

**Update A User's Access Rights**

✔ User access right deleted successfully.

Currently editing access rights for security profile: UMLRTST1

Select	Company	Effective Date	Expiration Date	Type	Description
<input checked="" type="radio"/>	AARX	08/01/2024	12/30/9999	Inspection	Inspections Rights - All

# Launch Pad – Add Umler Permissions to User ID



- Umler Company Admins can select **Manage User Permissions** to search user name/ID and grant additional Umler permissions.
- Select the permission(s) you wish to add and select Mark(s), then select 'Submit.'
- Use 'Apply to All' to auto populate the selected Mark(s) for multiple permissions.

Enter your search criteria and click on the "Search" button to retrieve the users. You may use a wildcard (\*) for all criteria except employer.

Found 1 user(s) matching the search criteria.

Filter...

Id	First Name	Last Name	Employer	Phone	Email	Type	Status	Actions
UML...	Terry	Caulfield	RAILINC CORPORATION	91965150...	terry.caulfield@railinc.com	Web		<div><div>Edit User Profile</div><div>Change User Password</div><div>Manage User Status</div><div>Manage User Type</div><div>Manage User Permissions</div><div>View User Audit Log</div><div>Compare Local User to LDAP</div></div>

☒ Umler Access for Maintenance ( MARK required )

Access to Umler transaction/update functionality. (Including Notice Management)

☐ Name ☒ Mark

Mark: AARX

Selected Mark(s): RAIL

Effective Date: 6/13/2021

Expiration Date:

☒ Umler Access for Query ( MARK required )

Access to Umler Query functionality. (Display Unit, Equipment Query, Car management Query, Transaction Log, Inspection History, Historical Lineage Query, Locomotive Historical Blue Card Query and Equipment Unit Comparison).

☐ Name ☒ Mark

Mark:

Selected Mark(s): RAIL

Apply to all

# Launch Pad – Remove Umler Permissions for User ID





- To remove existing permissions, select **'Manage User Permissions'** and search user name/ID.
- Select each permission you wish to delete and then select **'Remove selected permissions.'**
- The page refreshes and displays the user's current permissions.

TERRY CAULFIELD ( UMLRTST1 ) ACTIVE ▾

Filter...

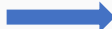
### Umler

The Universal Machine Language Equipment Register (Umler) is a central Rail Industry mission-critical database and suite of applications that store and communicate data pertaining to the massive inventory of railway equipment used by the industry. Add

Umler Access for Maintenance	AARE - RAILINC CORPORATION - TEST	06/13/2021	 <input checked="" type="checkbox"/>
Umler Access for Maintenance	AARX - TEMPORARY MOVEMENT PERMIT	06/13/2021	<input type="checkbox"/>
Umler Access for Maintenance	RAIL - RAILINC CORPORATION	04/01/2021	<input type="checkbox"/>
Umler Access for Query	AARE - RAILINC CORPORATION - TEST	06/13/2021	 <input checked="" type="checkbox"/>
Umler Access for Query	RAIL - RAILINC CORPORATION	04/01/2021	<input type="checkbox"/>

Comments  
not required

12/4/2021

 Remove selected permission(s)

### Umler

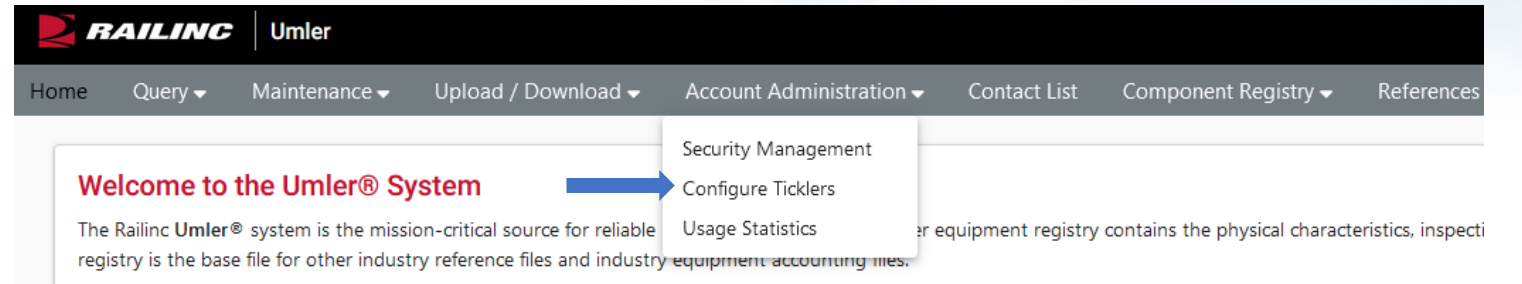
The Universal Machine Language Equipment Register (Umler) is a central Rail Industry mission-critical database and suite of applications that store and communicate data pertaining to the massive inventory of railway equipment used by the industry. Add

Umler Access for Maintenance	AARX - TEMPORARY MOVEMENT PERMIT	06/13/2021	<input type="checkbox"/>
Umler Access for Maintenance	RAIL - RAILINC CORPORATION	04/01/2021	<input type="checkbox"/>
Umler Access for Query	RAIL - RAILINC CORPORATION	04/01/2021	<input type="checkbox"/>

# Account Administration – Configure Ticklers



- Umler Ticklers are electronic event notifications meant to alert users of any updates they must attend to.
- Umler Company Admins can select 'Enabled' to specify which types of event notifications should be sent by Umler and to whom by entering their email address(es).
- Periodic review of the email subscribers will ensure the list is up-to-date.



**Configure Ticklers**

Specify the e-mail address to receive notifications of the following events: (Use commas to separate multiple e-mail addresses.)

Enabled	Event Code	Event	E-Mail Address
<input type="checkbox"/>	110	Warnings prior to deleting an idle pool header.	
<input type="checkbox"/>	120	Equipment is dropped from a pool due to an update to equipment characteristic.	
<input type="checkbox"/>	121	Maintenance Party updated for equipment.	
<input type="checkbox"/>	130	A pool assignment reported by a non-owner fails.	
<input type="checkbox"/>	190	A bulk upload by your company completes processing. (The notice contains the processing results for the uploaded transactions.)	
<input type="checkbox"/>	200	Another company grants an inter-company access right to your company.	
<input type="checkbox"/>	210	Another company revokes an inter-company access right from your company.	
<input type="checkbox"/>	220	Another company accepts an inter-company access right granted by your company.	
<input type="checkbox"/>	230	Another company declines an inter-company access right granted by your company.	
<input type="checkbox"/>	240	Another company relinquishes an inter-company access right granted by your company.	
<input type="checkbox"/>	270	Another company declines an access right transfer from your company.	

# Account Administration – Configure Ticklers



- **Top Umler Tickler Subscriptions**

- CFLT – Conflict status notification
- 430 – Another company restencils an equipment owned by your company
- 440 – Prior Equipment made inactive
- 450 – Equipment restencil completes
- 200 – Another company grants inter-company access rights
- 210 – Another company revokes
- 220 – Another company accepts
- 230 – Another company declines
- 240 – Another company relinquishes

<input checked="" type="checkbox"/>	430	Another company Restencils an equipment owned by your company. (The notice contains the processing results for the submitted Restencil transactions.)	<a href="mailto:trainus1@railinc.com">trainus1@railinc.com</a>
<input checked="" type="checkbox"/>	440	Prior equipment owned by your company made Inactive due to Restenciled equipment's status change to Active.	<a href="mailto:trainus1@railinc.com">trainus1@railinc.com</a>
<input checked="" type="checkbox"/>	450	A batch process for Equipment Restencil transaction completes processing. (The notice contains the processing results for the submitted Restencil transactions.)	<a href="mailto:trainus1@railinc.com">trainus1@railinc.com</a>
<input checked="" type="checkbox"/>	200	Another company grants an inter-company access right to your company.	<a href="mailto:trainus1@railinc.com">trainus1@railinc.com</a>
<input checked="" type="checkbox"/>	210	Another company revokes an inter-company access right from your company.	<a href="mailto:trainus1@railinc.com">trainus1@railinc.com</a>
<input checked="" type="checkbox"/>	220	Another company accepts an inter-company access right granted by your company.	<a href="mailto:trainus1@railinc.com">trainus1@railinc.com</a>
<input checked="" type="checkbox"/>	230	Another company declines an inter-company access right granted by your company.	<a href="mailto:trainus1@railinc.com">trainus1@railinc.com</a>
<input checked="" type="checkbox"/>	240	Another company relinquishes an inter-company access right granted by your company.	<a href="mailto:trainus1@railinc.com">trainus1@railinc.com</a>
<input checked="" type="checkbox"/>	CFLT	Conflict creation/status warning notifications for the equipment.	<a href="mailto:trainus1@railinc.com">trainus1@railinc.com</a>

# Account Administration – Usage Statistics



- Umler Company Admins can monitor requests such as Web services and CSV Downloads.
  - Users with Advanced Query Access are permitted to download data via CSV.
- Make the required selections and select 'Submit.'

A screenshot of the Railinc Account Administration web interface. The top navigation bar includes links for Home, Query, Maintenance, Upload / Download, Railinc Admin Functions, Account Administration (selected), Contact List, Component Registry, and References. The main content area is titled 'Usage Statistics' and contains instructions: 'Usage Statistics are available to Company Administrators to monitor billable requests such as web service downloads.' and 'Select criteria below to view usage. Only full month results are provided. Entering a partial month will return results for the entire month.' Below this, there is a section labeled '\* Select User' with a dropdown menu showing four options: 'RAILTEST - Karrington Evans', 'TBCXML - Terry Caulfield', 'KARXML - Karrington Evans', and 'TRAINUS1 - Tracy Brewer'. To the right of the user selection, there is a date field set to '09/30/2024'. A modal window is open over the date field, showing three options: 'CSV DOWNLOAD' (highlighted with a blue arrow), 'WEB SERVICES', and 'BLUE CARD'. At the bottom right of the form, there are two buttons: 'Submit' and 'Cancel'.



# Account Administration – Usage Statistics



- Umler Company Admins can view **Usage Statistics** under their Company Mark for all users within any 90-day period or view an individual user's statistics for a given month.
- Only full-month results are provided.

## Usage Statistics

Search Criteria      Search Results

### Usage Details :

User ID	Transaction Type	Mon-Year	Billable Records
TRAINUS1	EQUIP_QUERY	Jul-2024	75517

## Usage Statistics

Search Criteria      Search Results

### Usage Summary :

Transaction Type	Mon-Year	Billable Records
EQUIP_QUERY	Jul-2024	85912
EQUIP_QUERY	Jun-2024	54355
EQUIP_QUERY	May-2024	263828
TRANS_LOG_QUERY	Jul-2024	483
TRANS_LOG_QUERY	Jun-2024	28505
TRANS_LOG_QUERY	May-2024	37220

### Usage Details :

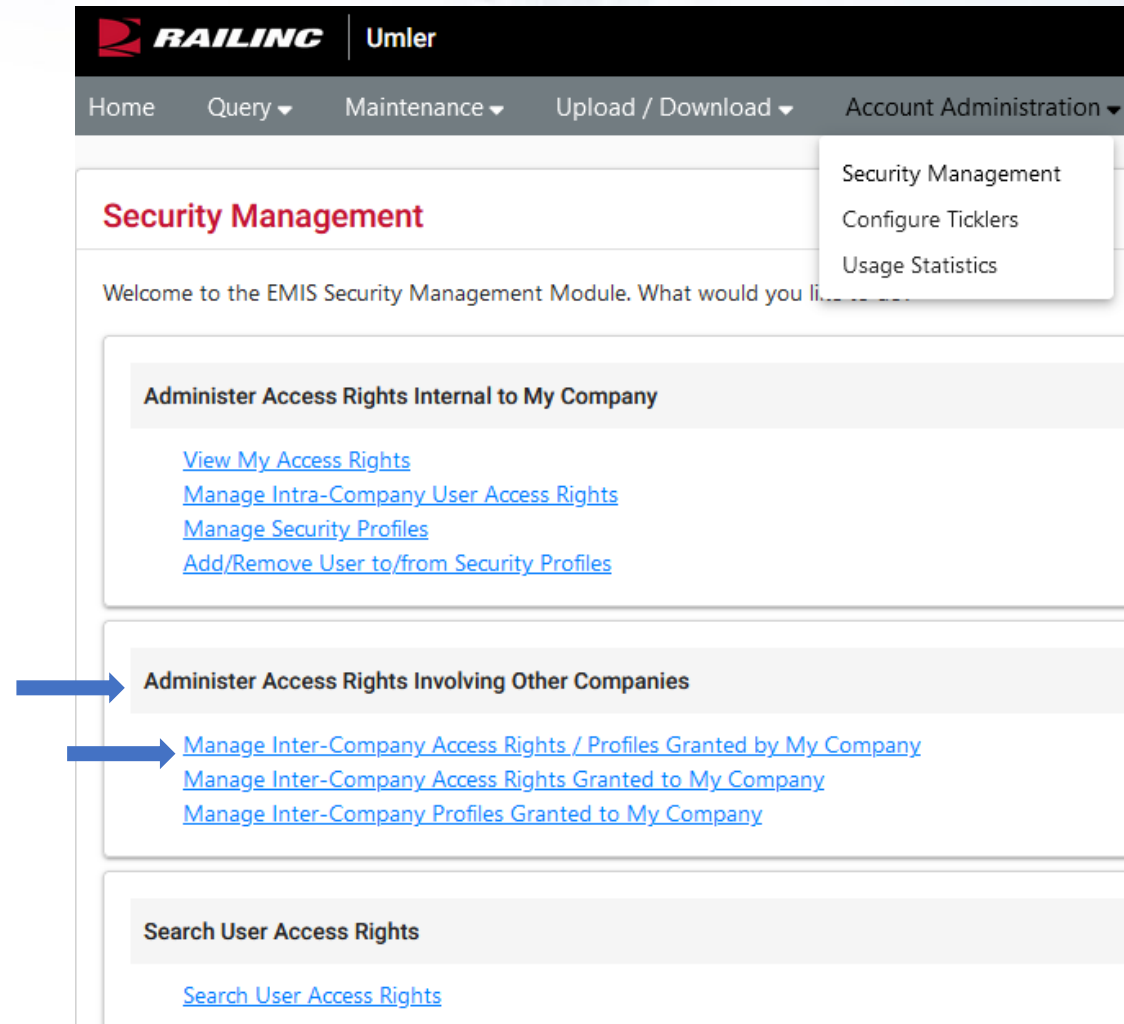
User ID	Transaction Type	Mon-Year	Billable Records
BSAXC01	EQUIP_QUERY	Jul-2024	1163
BSAXK04	EQUIP_QUERY	May-2024	125874
BSDXF01	EQUIP_QUERY	Jul-2024	6224
BSEXC01	EQUIP_QUERY	May-2024	220
BSJXL04	EQUIP_QUERY	Jun-2024	863
BSKXE02	EQUIP_QUERY	Jul-2024	144
BSKXE02	EQUIP_QUERY	Jun-2024	770
BSKXE02	TRANS_LOG_QUERY	Jul-2024	51
BSMXB03	EQUIP_QUERY	Jun-2024	35590
BSMXG01	EQUIP_QUERY	Jul-2024	333
BSMXG01	EQUIP_QUERY	Jun-2024	10360

# Questions?

# Account Administration – Transferring Ownership



- When equipment transfers ownership, Umler Company Admins will need to **Administer Access Rights Involving Other Companies** and select ‘Manage Inter-Company Access Rights / Profiles Granted by My Company.’
- Umler Company Admins can grant **View Confidential Data Right** to new owner for visibility to:
  - Built Date
  - Rebuilt Date
  - Purchase Price
  - Additions and Betterment



# Inter-Company Access Rights – Add A Company



- Select 'Add a Company' and scroll to locate the Company Mark you wish to grant Access Rights.

Home Query Maintenance Upload / Download Account Administration Contact List Component Registry References

### Inter-Company Access Rights Granted by My Company

Select the company whose access rights you want to edit.

Select	Company
<input type="radio"/>	<a href="#">AARE</a> RAILINC Umler Test Company
<input type="radio"/>	<a href="#">RAIL</a> RAILINC CORPORATION

[Add a company...](#)

0000 - Roadmark/Company ID - not found

A000 - RAILINC RUNNING REPAIR MARK

A001 - TTX COMPANY RUNNING REPAIR AGENT MARK

A002 - F & M CAR & LOCOMOTIVE INC.

A004 - GBW RAILCAR SERVICES LLC MODESTO CA

# Example – Add View Confidential Data Right to Company

- In this example, the selling entity, AARX, has granted Rights previously before and selects 'RAIL' and then selects 'Grant Access Rights.'
- Next, select 'Add View Confidential Data Right.'

Inter-Company Access Rights Granted by My Company

Select the company whose access rights you want to edit.

Clear Filters

Select	Company	Company Name
<input type="radio"/>	AARX	RAILINC Umler Test Company
<input checked="" type="radio"/>	RAIL	RAILINC CORPORATION

Add a company...

Grant Access Rights Grant Profiles Done

Update Access Rights

Currently editing access rights for: RAIL

Clear Filters

Select	ID	Effective Date	Expiration Date	Type	Description	Status
<input checked="" type="radio"/>	967327	08/07/2020	12/31/9999	View Confidential Data	Sold AARX 6650 to RAIL	Accepted
<input type="radio"/>	975030	05/27/2021	12/31/9999	View Confidential Data	Sold AARX 8880-8882	Accepted
<input type="radio"/>	1019601	01/26/2023	12/31/9999	View Confidential Data	Test AARX 317 confidential right	Accepted
<input type="radio"/>	1062323	06/11/2024	12/30/9999	Equipment	Test AARX	Accepted
<input type="radio"/>	1062359	06/13/2024	12/30/9999	Equipment	Test Q2	Accepted

Add Pool Right Add Equipment Right Add Inspection Right Add View Confidential Data Right View Revoke

Done

# Add View Confidential Data Right



- Next, enter the required fields:
  - Add brief description for the user's access
  - Add Effective Date
  - Modify Expiration Date or leave default date as 12/31/9999

Description of Access Right				
Description *				
Timeframe of Authority				
Effective Date *		Expiration Date *		
		12/30/9999		
Range of Equipment				
<input checked="" type="checkbox"/> All Equipment:				
SCAC(s):		Initial(s):		Equipment Group(s):
RAIL		AARX RAIL		BOXC CHSS CONT EOTD
Equipment:				

# Add View Confidential Data Right



- Umler Company Admins can restrict access to any one of the following under **Range of Equipment**:
  - Deselect All Equipment to restrict access as appropriate
    - Equipment Initial(s)
    - Equipment Group(s)
    - Equipment IDs or Equipment series
- **In the Range of Equipment only one option should be selected**
- Press 'Count Equipment' to determine the number of equipment units included in the rights assigned.
- Select 'Save.'

**Description of Access Right**

Description \*

Sold AARX 8880-8882

**Timeframe of Authority**

Effective Date \*

08/01/2024

Expiration Date \*

12/30/9999

**Range of Equipment**

☐ All Equipment:

SCAC(s):

RAIL

Initial(s):

AARX  
RAIL

Equipment Group(s):

BOXC  
CHSS  
CONT  
EOTD

Equipment:

AARX8880  
AARX8881  
AARX8882

**Save** **Count Equipment** **Cancel**



# Example – Confirmed Confidential Data Rights Pending



- Umler Company Admin has granted the required access for the Buying entity to view Confidential Data on equipment transferring ownership.
- Select ‘Done’ to exit from the screen.

## Update Access Rights



View Confidential Data Right added successfully.



Currently editing access rights for: [RAIL](#)

Clear Filters

Select	ID	Effective Date	Expiration Date	Type	Description	Status
<input type="radio"/>	967327	08/07/2020	12/31/9999	View Confidential Data	Sold AARX 6658 to RAIL	Accepted
<input type="radio"/>	975030	05/27/2021	12/31/9999	View Confidential Data	Sold AARX 8880-8882	Accepted
<input type="radio"/>	1019601	01/26/2023	12/31/9999	View Confidential Data	Test AARX 317 confidential right	Accepted
<input type="radio"/>	1062323	06/11/2024	12/30/9999	Equipment	Test AARX	Accepted
<input type="radio"/>	1062359	06/13/2024	12/30/9999	Equipment	Test Q2	Accepted
<input checked="" type="radio"/>	1063760	08/01/2024	12/30/9999	View Confidential Data	Sold AARX 8880-8882	Pending

+ Add Pool Right

+ Add Equipment Right

+ Add Inspection Right

+ Add View Confidential Data Right

View

Revoke

Done

# Buying Entity Accepts – View Confidential Data Right



- The Umler Company Admin will receive Tickler 200 if requested to alert them access was granted.
- Go to Security Management and under **Administer Access Rights Involving Other Companies.**
- Select ‘Manage Inter-Company Access Rights Granted to My Company.’
- Locate the Pending ‘View Confidential Data Right.’
- Select the access Right & click ‘View.’

## Administer Access Rights Involving Other Companies

[Manage Inter-Company Access Rights / Profiles Granted by My Company](#)

➔ [Manage Inter-Company Access Rights Granted to My Company](#)

[Manage Inter-Company Profiles Granted to My Company](#)

### Inter-Company Access Rights Granted to My Company

Select	ID	Grantor	Effective Date	Expiration Date	Type	Description	Status
<input type="radio"/>	1031107	<a href="#">A110</a>	07/17/2023	12/31/9999	Inspection	Inspection Rights	Accepted
<input type="radio"/>	1031108	<a href="#">STIV</a>	07/17/2023	12/31/9999	Inspection	Inspection Rights	Accepted
<input type="radio"/>	1031110	<a href="#">TOPX</a>	07/17/2023	12/31/9999	Inspection	Inspection Rights	Accepted
<input type="radio"/>	1031111	<a href="#">A125</a>	07/17/2023	12/31/9999	Inspection	Inspection Rights	Accepted
<input type="radio"/>	1031113	<a href="#">CPRS</a>	07/17/2023	12/31/9999	Inspection	Inspection Rights	Relinquished
<input type="radio"/>	1031115	<a href="#">SOO</a>	07/17/2023	12/31/9999	Inspection	Inspection Rights	Accepted
<input type="radio"/>	1031117	<a href="#">DH</a>	07/17/2023	12/31/9999	Inspection	Inspection Rights	Accepted
<input type="radio"/>	1031119	<a href="#">DME</a>	07/17/2023	12/31/9999	Inspection	Inspection Rights	Accepted
<input type="radio"/>	1031121	<a href="#">CMQ</a>	07/17/2023	12/31/9999	Inspection	Inspection Rights	Accepted
<input type="radio"/>	1031123	<a href="#">BNSE</a>	07/17/2023	12/31/9999	Inspection	Inspection Rights	Accepted
<input type="radio"/>	1031125	<a href="#">C167</a>	07/17/2023	12/31/9999	Inspection	Inspection Rights	Accepted
<input type="radio"/>	1031146	<a href="#">CP</a>	07/17/2023	12/31/9999	Inspection	Inspection Rights	Accepted
<input type="radio"/>	1062323	<a href="#">AARX</a>	06/11/2024	12/30/9999	Equipment	Test AARX	Accepted
<input type="radio"/>	1062359	<a href="#">AARX</a>	06/13/2024	12/30/9999	Equipment	Test Q2	Accepted
<input type="radio"/>	1062918	<a href="#">ATX</a>	06/26/2024	06/27/2024	View Confidential Data	Testing Data	Expired
<input type="radio"/>	1062919	<a href="#">AGPX</a>	06/26/2024	06/27/2024	View Confidential Data	Testing Data	Expired
<input type="radio"/>	1063760	<a href="#">AARX</a>	08/01/2024	12/30/9999	View Confidential Data	Sold AARX 8880-8882	Pending

# Enhanced Process for Transferring Ownership



- The Enhanced Process for Transferring Ownership replaces the original AAR Form 88-C.
- A summary of the View Confidential Data Rights is displayed.
- Owners will have visibility (via CSV download) prior to accepting confidential data rights.
- The Umler Company Admin first selects 'Download CSV' to view the Confidential details of the equipment.

View Confidential Data Access Right

Details

Status:

Pending

Company:

AARX

Description:

Sold AARX 8880-8882

Timeframe of Authority

Effective Date:

08/01/2024

Expiration Date:

12/30/9999

Range of Equipment

Equipment Types(s):

Equipment:

AARX0000008880

AARX0000008881

AARX0000008882

Accept

Decline

Done

Download CSV

Please make a selection below:

☐ Lease Agreement

☐ Sold

☐

By [redacted] and accepting confidential data rights, the accepting party confirms that equipment meets the requirements of AAR Office Manual Rule 88.C.1.b. Specifically, the accepting party confirms that the units do not have any basic structural weakness or damage that would cause an unsafe operating condition or that any such weakness or damage has been repaired by an MSRP M-1003 certified car repair facility and currently meet all applicable interchange requirements. Additionally, if the transaction includes Tank Car equipment, the accepting party confirms that they have received copies of the Certificate of Construction (AAR Form 4-2) and Exhibit R-1 forms (see MSRP Section C-III) along with drawings of General Arrangement, Tank Arrangement, and Fittings Arrangement(s).

	A	B	C	D	E	F	G	H	I
1	Equipment Id	Prior Equip	Built Date	Rebuilt Date	Mechanics	Original Certificate of Construction			
2	AARX0000008880		20161001		GB				
3	AARX0000008881		20161001		GB				
4	AARX0000008882		20161001		GB				
5									

# Buying Entity Assigns Confidential Data Rights to User



- Next, select ‘Assign to User.’
- A list of maintenance User IDs is displayed.
- Select the ‘User ID’ that is accepting the Confidential Data Rights and click ‘Select.’

View Confidential Data Access Right

✓ Inter-company access right accepted successfully.

**Details**

Status: Accepted  
Company: AARX  
Description: Sold AARX 8880-8882

**Timeframe of Authority**

Effective Date: 08/01/2024      Expiration Date: 12/30/9999

**Range of Equipment**

Equipment Types(s):      Equipment:  
AARX0000008880  
AARX0000008881  
AARX0000008882

→ [Assign to User](#) [Assign to Profile](#) [Relinquish](#) [Done](#)

☒ TRAINUS1      Brewer Tracy

# Confirmed – Buying Entity Accepts View Confidential Data

- The buying entity can now view the Confidential Data for the specific equipment IDs and can perform the restencil to transfer ownership in Umler.
- Select 'Done' to exit from the screen.

View Confidential Data Access Right

Currently assigning a right to: TRAINUS1  
Edit the details of the access right.

Save

Count Equipment

Done

Description of Access Right

Access Right ID (Assigned from Inter-company)  
1063760

Description \*  
Sold AARX 8880-8882

Timeframe of Authority

Effective Date \*  
08/01/2024

Expiration Date \*  
12/30/9999

Range of Equipment

☐ All Equipment:

SCAC(s):

Initial(s):

Equipment Group(s):

Equipment:  

☒ AARX0000008880  
☒ AARX0000008881  
☒ AARX0000008882

Save

Count Equipment

Done

View Confidential Data Access Right

Inter-company access right assigned successfully.

Details

Status: Accepted  
Company: AARX  
Description: Sold AARX 8880-8882

Timeframe of Authority

Effective Date: 08/01/2024

Expiration Date: 12/30/9999

Range of Equipment

Equipment Types(s):

Equipment:  
AARX0000008880  
AARX0000008881  
AARX0000008882

Assign to User

Assign to Profile

Relinquish

Done

# Search User Access Rights



- To identify all users with Access Rights under your Company Mark, go to Security Management and Select '**Search Users Access Rights**' link.

A screenshot of the EMIS Security Management Module web interface. The top navigation bar includes links for Home, Query, Maintenance, Upload / Download, Account Administration, and Contact List. A dropdown menu is open under 'Account Administration', showing 'Security Management', 'Configure Ticklers', and 'Usage Statistics'. The main content area is titled 'Security Management' and contains a welcome message: 'Welcome to the EMIS Security Management Module. What would you like to do?'. Below this, there are three main sections: 'Administer Access Rights Internal to My Company' with links for 'View My Access Rights', 'Manage Intra-Company User Access Rights', 'Manage Security Profiles', and 'Add/Remove User to/from Security Profiles'; 'Administer Access Rights Involving Other Companies' with links for 'Manage Inter-Company Access Rights / Profiles Granted by My Company', 'Manage Inter-Company Access Rights Granted to My Company', and 'Manage Inter-Company Profiles Granted to My Company'; and 'Search User Access Rights' with a link 'Search User Access Rights' highlighted by a blue arrow.

# Search User Access Rights



- Umler Company Admins can select any search parameter if looking for specific information or press ‘Search’ to locate all users with access rights.
- User the filter to narrow your search results.

Search Access Rights Results

Search Criteria

Search Results

Search Access Rights

Search

Cancel

Results will include rights matching ALL of the following criteria.

User ID(s):

Type Of Access:

"Pool Management" - Assignment / Unassignment  
AFMC Inspection  
Add Equipment  
Add a Pool Header  
Air Brake Test  
Autorack Certification  
Autorack Inspection  
Autorack Repair  
Car Grade Inspection  
Delete Equipment

Access Right(s):

Equipment  
Inspection  
Pool  
View Confidential Data

Status:

☒ Active  
☐ Inactive

Search Access Rights Results

Search Criteria

Search Results

User Right/Profile ID	Name		Effective Date	Expiration Date	Last Updated Date
<a href="#">124801</a>	Terry Caulfield	Contains	2018-08-22	9999-12-31	2018-08-22
<a href="#">951937</a>	Terry Caulfield	Terry	2018-08-22	9999-12-31	2018-08-22
<a href="#">959433</a>	Terry Caulfield	AND OR	2020-06-15	9999-12-31	2020-06-15
<a href="#">966507</a>	Terry Caulfield	Contains	2020-12-10	9999-12-31	2024-06-13
<a href="#">966508</a>	Terry Caulfield	Filter...	2020-12-10	9999-12-31	2024-06-13
<a href="#">991515</a>	Terry Caulfield	Pool	2022-03-17	9999-12-31	2022-03-17
<a href="#">993540</a>	Terry Caulfield	Inspection	2022-03-25	9999-12-31	2022-03-25
<a href="#">993541</a>	Terry Caulfield	Equipment View	2022-03-25	9999-12-31	2022-03-25



# Umler Company Admins – Reminders



- Manage incoming Umler permission requests from Launch Pad.
- Accept/Reject Umler permissions for your Company Mark from Launch Pad.
- *Reject any permission request not applicable for user.*
- For approved permissions granted to Umler Maintenance users, login Umler and go to Account Administration on menu bar, and under Security Management, grant Equipment Access Rights and Inspection Access Rights.
- When transferring equipment ownership, grant View Confidential Data Rights to buying entity/Company Mark.
  - To ensure visibility of equipment Built Date, Rebuilt Date and Purchase Price.
- Manage and assign Ticklers to email address for Umler events and View Usage Statistics to manage queries.
- Routinely check for users that may have retired, terminated or no longer working for your company and ensure their Umler access rights are deleted and permissions removed.
- Third-Party Agents will be required to have a valid Letter of Authorization (LOA) to view and/or maintain Umler records for specified companies.
  - LOA policy requires annual re-validation.

# Umler Access for Maintenance



## Add Equipment

Allows a user to add a new equipment unit to Umler.

## Clone Equipment

Allows a user to add single and multiple equipment units by cloning from an existing unit.

## Add-Back Equipment

Allows a user to add an equipment unit back into active status from online Umler archives.

## Modify Single Equipment

Allows a user to change elements for a single equipment unit.

## Modify Multiple Equipment

Allows a user to change selected elements for several equipment units in one editing session.

## Single Restencil

Allows a user to modify a record to reflect restenciling of the piece of equipment. Restenciling refers to the act of changing the equipment mark and number that is stenciled on the side of an equipment unit.

## Multiple Restencil

Allows a user to restencil multiple cars sequentially or following a pattern.

## Change Equipment Group

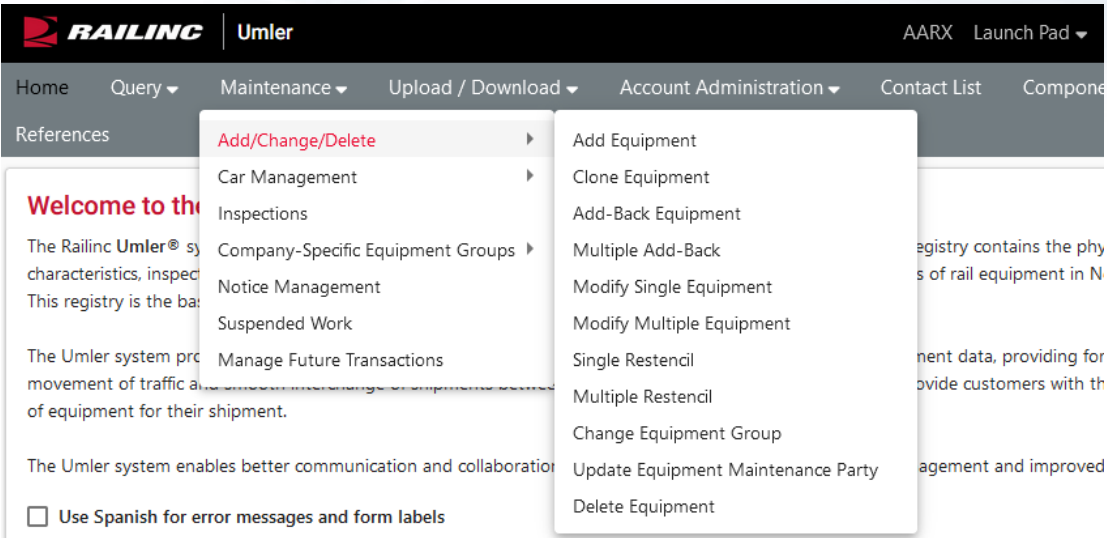
Allows a user to change an Umler Equipment Group for a single equipment unit.

## Update Equipment Maintenance Party

Allows the user to update the Equipment Maintenance Party.

## Delete Equipment

Allows a user to deactivate an Umler record, sending the record to archive.



# Upload/Download



- **Umler Bulk Upload Access**
  - Allows users to upload CSV formatted records:
    - Equipment Adds
    - Equipment Changes
    - Equipment Deletes
    - Report Inspections
  - A confirmation email is sent to the user when the records complete processing through rule validations.

A screenshot of the RAILINC Umler Bulk Upload interface. The page has a dark header with the RAILINC logo and 'Umler' text. Below the header is a navigation bar with links: Home, Query, Maintenance, Upload / Download, Railinc Admin Functions, Account Administration, Contact List, Component Registry, and References. The main content area is titled 'Upload Umler Transactions' in red. It contains an 'IMPORTANT NOTE' about CSV uploads and a list of steps for uploading transactions. At the bottom, there is a 'Browse...' button and a text field showing 'No file selected.'

**RAILINC** | Umler

Home Query Maintenance Upload / Download Railinc Admin Functions Account Administration Contact List Component Registry References

### Upload Umler Transactions

IMPORTANT NOTE: Umler allows comma delimited file uploads for various transactions. Each transaction type has a defined set of parameters specific to that transaction type. This option is intended for Access to perform this function by the company administrator. It is advised that you first test upload formats that you create in the test environment before attempting to use them in the Production e customer support group at [csc@railinc.com](mailto:csc@railinc.com) and you may also reference the [Bulk Upload Transactions CSV File Specifications](#).

To upload Umler transactions in CSV format:

1. Select the Browse button.
2. Select the appropriate directory.
3. Select the correct file.
4. Select Open.
5. Select Upload.

No file selected.

# Upload/Download



## Upload Summary

Total Transactions Processed :	1
Transactions Successfully Applied :	1
Transactions Partially Applied :	0
Transactions Failed :	0

Done

## Upload Summary

Total Transactions Processed :	1
Transactions Successfully Applied :	0
Transactions Partially Applied :	0
Transactions Failed :	1

### Additional Upload Information

Notice ID	Unit ID	Event Description
65199665	AARX0000000303	Equipment Characteristic Change failed. The data entered by the user resulted in no changes being applied to the system because the values entered matched what is currently populated in the Umler system.

Done

# Umler Access for Query



## Display Unit

Allows the user to view the entire Umler record for a specified equipment ID.

## Equipment Query

Allows the user to query for equipment unit information. Provides access to saved queries.

## Car Management Query

Allows the user to search for specific pools and equipment in order to view pool header and assignment data and perform edits.

## Transaction Log

The transaction log provides a history of all activity (related to equipment and pool data) successfully applied to the system. This page provides a search engine that allows the user to query transaction records by various criteria such as transaction type and equipment group. The user can view the details of found transaction records.

## Inspection History

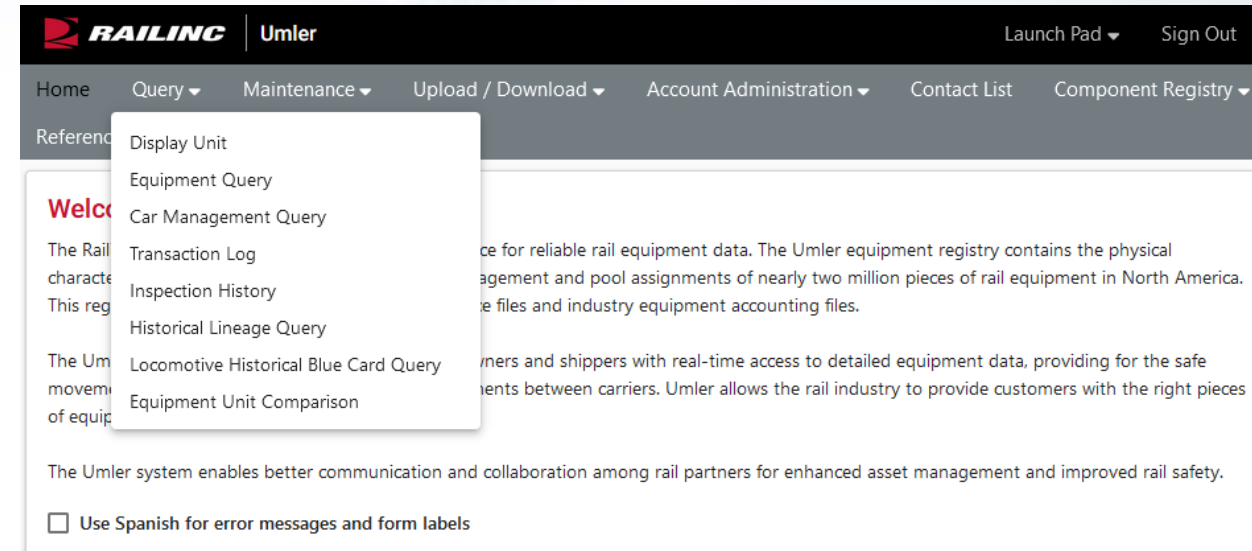
Allows a user to request inspection history of equipment or by inspection types.

## Historical Lineage Query

Allows a user to request and view a lineage query for a single piece of equipment.

## Equipment Unit Comparison

Allows a user to view the differences between any two pieces of equipment in the same equipment category.



# Umler Advanced Query Access



- **Umler Advanced Query Access** allows users the ability to download data from Umler.
- Umler Company Admins can check real-time usage statistics under Account Administration or Configure Ticklers to receive alerts.

**Equipment Query**

Search Count Save Clear

Basic Customize Query Output Saved Queries

Enter one or more fields to search equipment information.

Query Results are limited to 50 attributes per equipment record. If you require more attributes or have more complex data requirements, please email [csc@railinc.com](mailto:csc@railinc.com) with the details of your request and Railinc can assist you with your data needs.

Results will include equipment matching ALL of the following criteria.

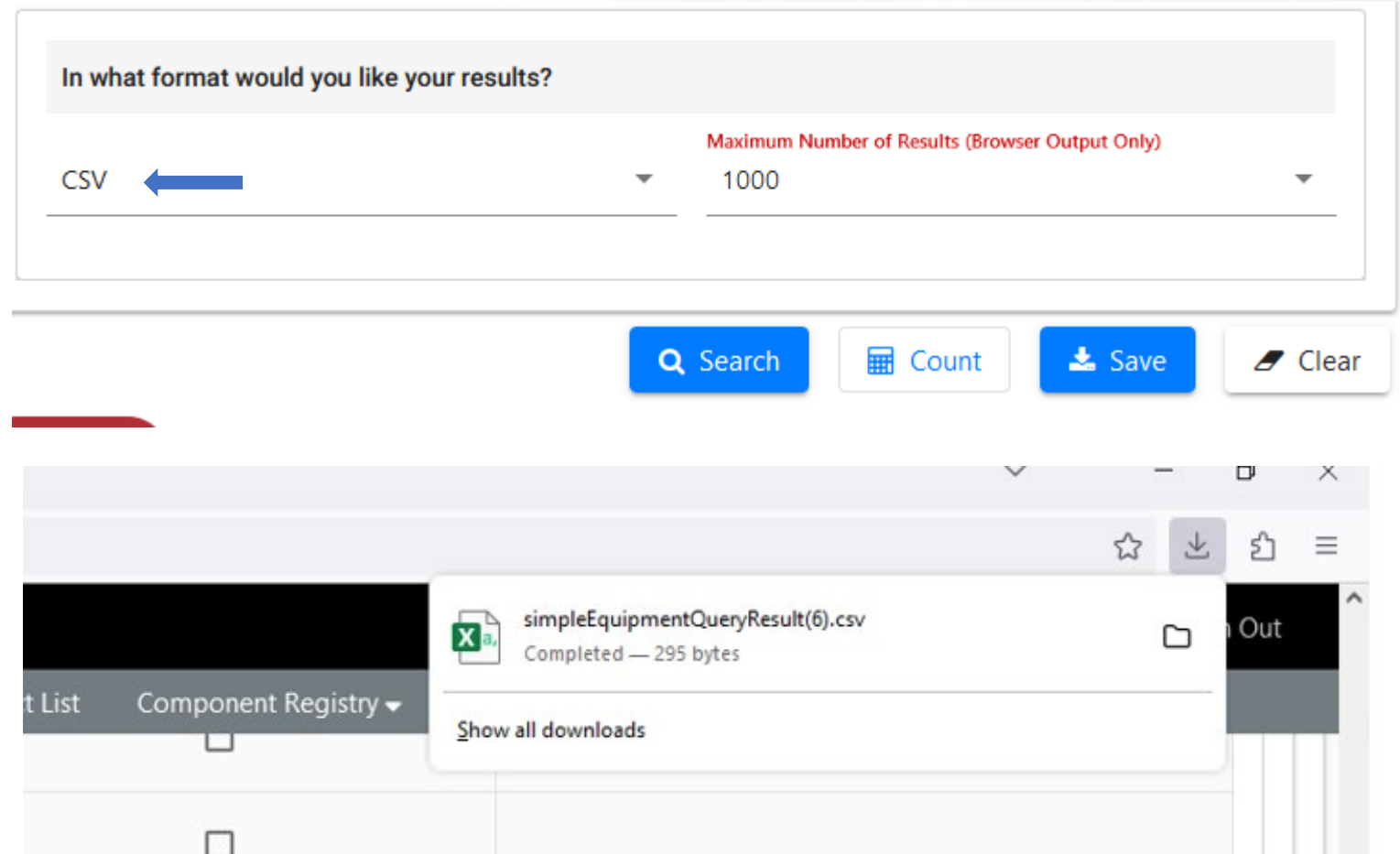
Equipment IDs	Pool IDs
Equipment Groups: Box Gondola Hopper Tank	Equipment Type Codes: <input checked="" type="radio"/> Query by complete codes <input type="radio"/> Query by partial codes
Mechanical Designations	Include equipment restricted in interchange Yes
EINs	Company-Specific Equipment Groups
Equipment Initials	Umler Owner
Umler Company	Lessee
Stenciled Mark Owner	Equipment Status: <input type="radio"/> Status <input type="radio"/> No Status



# Umler Advanced Query Access



- **Umler Advanced Query Access** allows users the ability to download data from Umler.
- Change output drop-down menu from Browser to CSV.

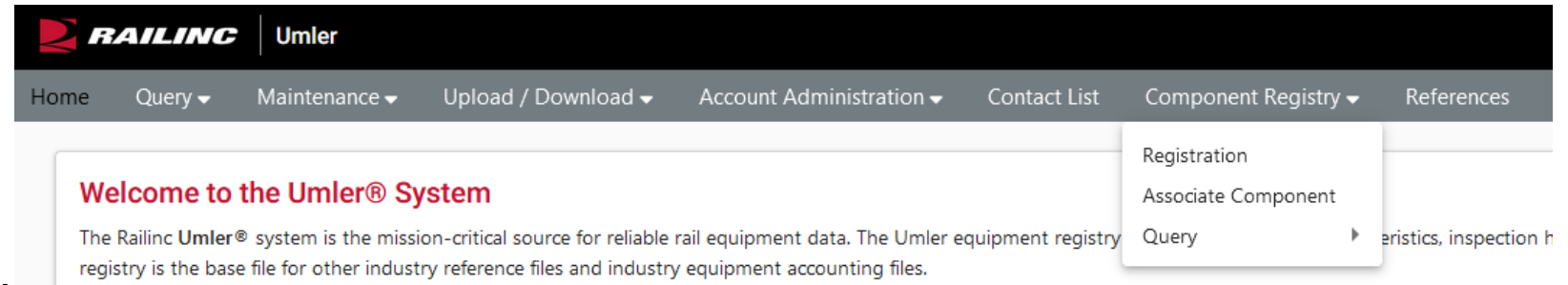




# Component Maintenance Access



- **Component Maintenance Access** allows users access to the Component Registry menu:
  - Registration
  - Associate Component
  - Query
- Users must also have **Umler Access for Maintenance** and Access Rights to associate components to equipment.



# Umler Homepage – Contact List



[Open Findus.rail for Industry Contact Information](#)

## Welcome to the Umler® System

The Railinc Umler® system is the mission-critical source for reliable rail equipment data. The Umler equipment registry contains the physical characteristics, inspection history, transportation management and pool assignments of nearly two million pieces of rail equipment in North America. This registry is the base file for other industry reference files and industry equipment accounting files.

The Umler system provides rail carriers, equipment owners and shippers with real-time access to detailed equipment data, providing for the safe movement of traffic and smooth interchange of shipments between carriers. Umler allows the rail industry to provide customers with the right pieces of equipment for their shipment.

The Umler system enables better communication and collaboration among rail partners for enhanced asset management and improved rail safety.

☐ Use Spanish for error messages and form labels

## Release Docs

[Umler User Guide](#)  
[Umler Data Specification Manual](#)  
[Umler Change Request Form](#)  
[Component Registry User Guide](#)  
[Component Registry Data Specification Manual](#)  
[Advanced Query User Guide](#)

## Umler Contacts for RAIL


External users are provided the following contacts when searching for RAIL Umler File Maintainers in Findus.Rail:

Umler Company Administrator(s) for RAIL Equipment, Pool, and Inspection Rights:

To search for contacts at other companies [click here](#)

## Equipment

Single Equipment Search

 Search

[Equipment units in conflict: 711](#)

[Download Equipment in Conflict](#)

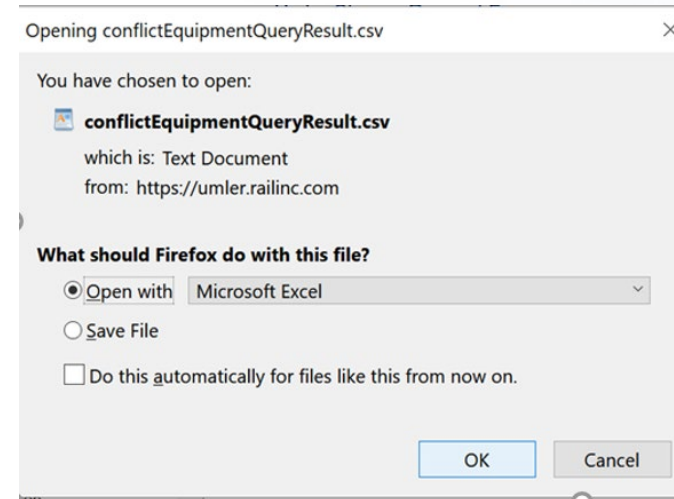
[Equipment with component ID conflicts: 9](#)

[Equipment Validation Requests: 16](#)

# Conflict Management



- On the Umler homepage, the conflict management links appear on the top right side of page:
  - Equipment units in conflict
  - Download Equipment in Conflict
  - Equipment with component ID conflicts
- Monthly emails will be sent to the Umler contact in FindUs.Rail.
- Conflicts not addressed may result in cars being restricted at interchange.
- Select 'Download Equipment in Conflict'
  - All the errors for each equipment unit in conflict can be downloaded.
  - Select 'Open' and/or 'Save File.'



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Equipment	Id	Status Code	Element Name	Element ID	Element Value	Component Type	Component ID	Component Location	Parent Component ID	Parent Cor				
2	AARX0000005555	"A"	"Non-Compliant Wheelsets"	"B544"	"Y"	"E"	"BASE"	"1"	"0000102049"	"A wheelset Component ID is required for each applicable location on equip					
3	AARX0000008880	"I"	"Load Limit"	"LDLT"	"80000"	"E"	"BASE"	"1"	"0000102429"	"When Status Code changes to Active or Inactive Weighing Status must be reported as A					
4	AARX0000008880	"I"	"Non-Compliant Wheelsets"	"B544"	"Y"	"E"	"BASE"	"1"	"0000102049"	"A wheelset Component ID is required for each applicable location on equipr					
5	AARX0000008880	"I"	"Journal Size"	"A147"	"E"	"E"	"TRUCK"	"A"	"TRUCKSYS"	"A"	"0000102429"	"When Status Code changes to Active or Inactive Weighing Status must be rep			
6	AARX0000008880	"I"	"Journal Size"	"A147"	"E"	"E"	"TRUCK"	"B"	"TRUCKSYS"	"B"	"0000102429"	"When Status Code changes to Active or Inactive Weighing Status must be rep			
7	AARX0000008880	"I"	"Weighing Status"	"A289"	"E"	"E"	"BASE"	"1"	"0000102429"	"When Status Code changes to Active or Inactive Weighing Status must be reported as					
8	AARX0000008880	"I"	"Tare Weight"	"A259"	"80000"	"E"	"BASE"	"1"	"0000102429"	"When Status Code changes to Active or Inactive Weighing Status must be reported as					
9	AARX0000008880	"I"	"Gross Rail Load/Gross Weight"	"A266"	"160000"	"E"	"BASE"	"1"	"0000102429"	"When Status Code changes to Active or Inactive Weighing Status m					
10															
11															

# Conflict Management – Equipment with Component ID Conflicts



- Component ID conflicts will not restrict cars at interchange.
- Click ‘Equipment with Component ID Conflicts’ link to view all cars

## Equipment

Single Equipment Search

Search

Equipment units in conflict: 711

[Download Equipment in Conflict](#)

Equipment with component ID conflicts: 9

[Equipment Validation Requests: 6](#)

## Equipment Query Results

Search Criteria

Search Results

Select one or more equipment IDs, and an action, for pool management/equipment management. You may a 9 matches found. 9 available for display. 9 matches displayed on this page.

<input type="checkbox"/>	Equipment Id	Pool Number	Equipment Group	Equipment Type Co
<input type="checkbox"/>	<a href="#">RAIL 928</a>	0000000	GOND	E142
<input type="checkbox"/>	<a href="#">RAIL 6109</a>	0000000	BOXC	A403
<input type="checkbox"/>	<a href="#">RAIL 6116</a>	0000000	BOXC	A403
<input type="checkbox"/>	<a href="#">RAIL 6124</a>	0000000	BOXC	A403
<input type="checkbox"/>	<a href="#">RAIL 6127</a>	0000000	BOXC	A403

# Conflict Management



## Display Unit

Search

Search Result

Equipment is in conflict. [click to view.](#)

Modify Equipment

Cancel

Collapse All

Expand All

Equipment ID: RAIL0000000928

Equipment Group: GOND

Stenciled Mark Owner: RAIL

Show database values: ☐

Flat View: ☐

[Equip PDF](#) [Equipment Health View](#)

[General](#) [Weight](#) [Dimension](#) [Door](#) [Specification](#) [Feature](#) [Cost](#) [Car Management](#) [Train Service](#) [Truck Components](#) [Draft System Components](#) [Unit Segment Components](#) [Brake System Components](#) [Miscellaneous](#) [Inspection](#)

[Default Presentation Group](#)

EMERVALVE

Emergency Brake Valve

LOCATION 1

Element Name	ID	Flag	Value	Conflict
Emergency Brake Valve CID	<a href="#">B354</a>		RAIL0000000500	Component ID is associated to more than one Location on the car.
Emergency Valve COTS Date	<a href="#">B567</a>		0615	
Emerg Valve OEM Warr Date	<a href="#">B568</a>			
Emerg Valve Part Number	<a href="#">B569</a>		12	

Component ID	Name	Location	Error

EMERVALVE

Emergency Brake Valve

LOCATION 2

Element Name	ID	Flag	Value	Conflict
Emergency Brake Valve CID	<a href="#">B354</a>		RAIL0000000500	Component ID is associated to more than one Location on the car.

# Umler User Guide and Data Specification Manual

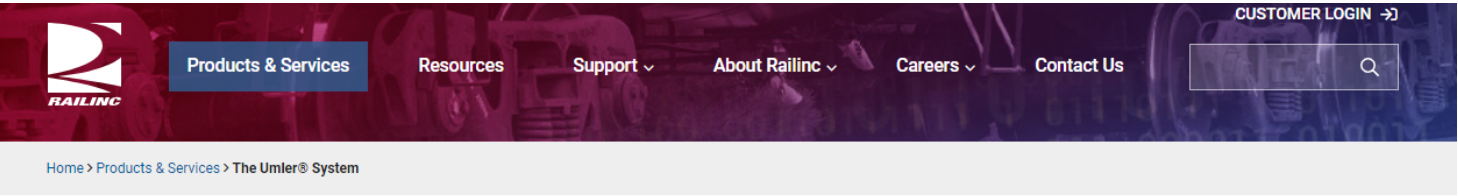


- Use links to access Umler User Guide and Umler DSM
- Umler Training Resources and Tools are available

A screenshot of the Umler System homepage. At the top is a dark navigation bar with links: Home, Query, Maintenance, Upload / Download, Railinc Admin Functions, Account Administration, Contact List, Component Registry, and References. A blue arrow points up to the 'References' link. Below the navigation bar is a large white box with the heading 'Welcome to the Umler® System'. It contains three paragraphs of text describing the system's mission-critical role in providing reliable rail equipment data, its use as a base file for industry reference, and its real-time access for safe movement of traffic. At the bottom of this box is a checkbox labeled 'Use Spanish for error messages and form labels'. Below the welcome box are two side-by-side boxes. The left box is titled 'Release Docs' and contains a list of links: 'Umler User Guide', 'Umler Data Specification Manual', 'Umler Change Request Form', 'Component Registry User Guide', 'Component Registry Data Specification Manual', and 'Advanced Query User Guide'. Two blue arrows point to the first two links. The right box is titled 'Umler Contacts for RAIL' and contains text about external user contacts when searching for RAIL Umler File Maintainers in Findus.Rail.



# References



## The Umler® System

Umler® is the source of critical data for more than two million pieces of North American rail, steamship, and highway equipment.

The Umler system provides secure access for equipment management and reporting tools, helping equipment owners provide high-quality data to logistics partners and customers.

The system identifies internal and external dimensions, capacities, weight information, and other specific characteristics of freight cars—as well as intermodal trailers and containers. It also serves as the base file for other standard industry equipment reference and management systems.

Railroads, equipment owners, agents, shippers, ports, suppliers, industry consultants, government agencies, and railcar service providers use Umler for the safe and efficient placement, movement, and interchange of railcars.

Umler also includes these enhanced functions:

- **Umler Change Request Form:** Provide details for all Umler system changes, including new elements, permissible values and business rules. Complete the form and email it to [csc@railinc.com](mailto:csc@railinc.com).
- **Component Registry:** Register certain railcar components and associate them with equipment for greater visibility into equipment health.
- **Conflict Management:** Identify equipment records in conflict, with supporting processes to resolve issues. Error messages identify changes that must be made to correct invalid equipment data.
- **Equipment Cloning:** Create single or multiple equipment records using an existing railcar as a template. Minimal changes reduce the time required to build new fleets in Umler.
- **Equipment Lineage:** Track ownership and equipment changes throughout its history, including inspections and equipment modifications.

### Related Support Documents

- Umler User Guide
- Umler Data Specifications Manual
- Umler Web Services User Guide
- Umler FAQs
- Railinc SSO Admin User Guide
- Umler TRAIN Messaging Specifications
- TRAIN II User Guide
- Locomotive Inspection and Repair Report
- Umler Restencil Request to Transfer Equipment Form
- Umler CSV Upload Specifications
- Umler Components Diagram
- Access SSO, Railinc and TransmetriQ Applications Quick Guide
- Umler Managing Access Rights Guide

## Umler Demos

Railinc has developed specific task-related demos to help you learn the core functions of the Umler® system. Each demo takes approximately three to five minutes to view. For additional assistance with these tasks, consult the **Umler Quick Guides** and the [Umler User Guide](#).

Be sure to turn on/up your speakers to hear the demos.





# Additional Umler Services



- Umler Web Services\*
- Component Tracking Web Services\*
- Umler Special Reports\*

*\* Additional fees apply, refer to Railinc Price List*

# Umler Fleet Services and Products for Most Car Owners



- **Car Repair Billing System** (CRBXEX00) – Billed once a year *Subscription Only. Based on all equipment EXCEPT locomotives, trailers, chassis, containers, and end-of-train devices registered in Umler under Stenciled Mark Owner.*
- **Damaged Defective Car Tracking** (DDCT00) – Billed once a year *Based on all equipment EXCEPT locomotives, trailers, chassis, containers, and end-of-train devices registered in Umler under Stenciled Mark Owner.*
- **Equipment Health Management System Registration** (EHMSFEE) – Billed once a year *Based on all equipment EXCEPT trailers, chassis, containers, and end-of-devices registered in Umler under Stenciled Mark Owner.*
- **Early Warning** (UMEWARN01) – Billed once a year *Based on all equipment EXCEPT locomotives, trailers, chassis, containers, and end-of-train devices registered in Umler under Stenciled Mark Owner.*
- **Umler Semi- Annual Registration** (UMMBLRP10 & UMMBLRP30) – Billed twice a year. *(Current registration of 1-81 cars = \$100 = UMMBLRP10. Current registration of 82 or more cars = \$1.16 each = UMMBLRP30.)*
- **Car Service/Car Hire** (CARSERHIR) - Billed twice a year. Car Hire for *railroad* marked cars is governed by the AAR Circular OT-10 Code of Car Hire Rules and Interpretations Freight.
- **Tank Car Services\*** (TANKTCID, TANKCREG) - Billed twice a year. Based on tank cars registered in Umler under Stenciled Mark Owner. TCID- Tank Car Integrated Database. CREG- Tank Car Component Registry- Pressure Relief Valves.

*\*Refer to Railinc Price List for applicable fees*

# Umler Equipment Registration Billing Reminders



- **Umler Semi-Annual Registration Billing** – *Refer to Railinc Price List*
  - Equipment Registration by Stenciled Mark Owner
- **Umler / AAR Tech User Semi-Annual Billing** – *Refer to Office Manual of AAR Interchange Rules, Appendix E for further details.*
  - Equipment Registration by Umler Owner
- Equipment registered in Umler is subject to a per-car registration fee.
- Umler Semi-Annual Registration fees are billed in February and August.
- Railinc administers the Umler / AAR Technical User Fees and Intermodal User Fees on behalf of the AAR, based on certain equipment registered in Umler.
- Umler/AAR Tech User fees are billed in January and July.
- Delete equipment (inactive) if no longer needed in Umler before Jan. 1 and/or July 1 of each year.
- **It is the responsibility of each owner or agent to maintain the accuracy of their fleets.**

# Questions?

# Railinc Customer Success Center

[csc@railinc.com](mailto:csc@railinc.com)

877-724-5462





# *Railinc Keeps You Moving.*

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**Terry Caulfield**

Phone: 1-877-RAILINC

Email: [csc@railinc.com](mailto:csc@railinc.com)

