

# **Equipment Health View User Guide**



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Last Updated: September 2022

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### **Learning about Equipment Health View**

Equipment Health View (EHV) is a web-based application that consolidates equipment information from Railinc's Umler<sup>®</sup>, Equipment Health Management System (EHMS), Damaged and Defective Car Tracking (DDCT), and Equipment Advisory (EA) systems, as well as mileage information from the Event Repository.

#### **Overview**

Equipment Health View enables authorized users to:

- View a subset of Umler data for an Equipment ID
- Report repairs and associate component IDs
- Report inspections for an Equipment ID for Equipment Advisories, EHMS, and Umler
- View Equipment Advisory notices for an Equipment ID
- View alert status for an Equipment ID
- View data summaries for an Equipment ID
- View damaged and defective status for an Equipment ID
- View mileage for an Equipment ID
- View inspection status for an Equipment ID
- View location status for an Equipment ID

### **Prerequisites**

To attain full use of EHV, contact your Company Admin and request the following application-specific SSO permissions:

- EHV
  - EHV Generic Access
- Umler
  - Umler Access for Maintenance
  - Umler Access for Query
  - Umler Inspection Rights (for reporting inspections)
- EHMS
  - Generic Access
  - Car Repair History (for reporting any repairs and inspections)
- DDCT
  - Handling Carrier (if applicable)
  - Car Owner (if applicable)
- Equipment Advisory
  - Equipment Advisory Query
  - Equipment Advisory Rept Inspections
- CRB
  - CRB Billing Repair Card User

#### **User Tools and References**

Refer to the following guides for information about application-specific reporting and requirements:

- <u>Umler User Guide</u>
- EHMS User Guide
- Equipment Advisory User Guide
- <u>DDCT User Guide</u>
- Component Tracking User Guide
- CRB Procedures Manual
- AAR Field Manual (link to purchase)
- <u>AAR Office Manual</u> (link to purchase)

### **System Requirements**

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

### **Accessing the Railinc Customer Success Center**

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

### **Getting Started**

The Equipment Health View application is accessed using the Railinc Single Sign On (SSO), which can be accessed from the Railinc portal at <a href="https://public.railinc.com/">https://public.railinc.com/</a> and log into SSO by selecting the Customer Login link in the top right corner.

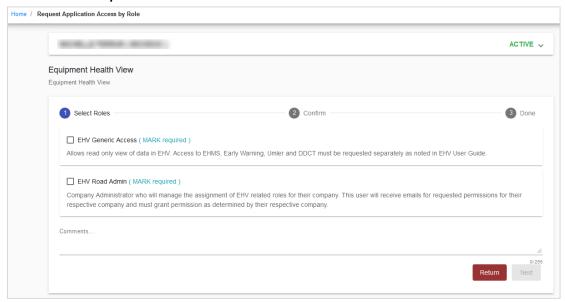
### Register to Use Railinc SSO

Before you can use Equipment Health View, you must register to use Railinc Single Sign On, which provides access to Railinc applications. Refer to the <u>Single Sign-On and Launch Pad User Guide</u>. Once you are registered to use SSO, you can use SSO to request access to EHV.

### Requesting Equipment Health View Access

After authorization to use Railinc SSO is received, you must request access to EHV (see <u>Exhibit</u> 1). Refer to the <u>Single Sign-On and Launch Pad User Guide</u> for more information. See <u>Prerequisites</u> for additional requirements.

Exhibit 1. EHV Request Permission



When you receive e-mail notification of access to EHV, you can log on and begin using EHV.

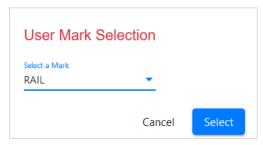
### Logging In

To log into Equipment Health View:

- 1. Open your internet browser and enter <a href="https://public.railinc.com">https://public.railinc.com</a> to open the Railinc website.
- 2. Select the **Customer Login** link in the upper right of the page. The Account Access page is displayed.
- 3. Enter your User ID and Password. Select Sign In. The Railinc Launch Pad is displayed.
- 4. In My Applications, select Equipment Health View.

The **User Mark Selection** popup is displayed (<u>Exhibit 2</u>). Use the drop-down to select the desired company and select **Submit**.

Exhibit 2. User Mark Selection



The Equipment Health View Home page is displayed (Exhibit 3).

**Note:** The logged in user at the top right of the Welcome page reflects the selected company for multi-company users.

Search Repair and Inspection Reporting No equipment selected **Umler Inspections** No UMLER inspection data found for equipment **Equipment Location Equipment Health Management System** No location data found for equipment No open alerts found for equipment **Umler Registry** No open data summaries found for equipment No UMLER data found for equipment Launch EHMS Launch Umler Damaged and Defective Car Tracking No DDCT items found for equipment Launch DDCT **Equipment Advisory** No equipment advisory assignments found for equipment

Exhibit 3. Equipment Health View Home Page

### **Logging Out**

Select the **Sign Out** link to end an Equipment Health View (SSO) session. You are returned to the SSO Login Page.

No equipment mileage records found for equipment

Mileage

If multiple SSO applications are open (in separate browser windows), and you want to close only one, close the unwanted window using **X**, or **Alt+F4**. Do NOT select the **Sign Out** link—it ends the entire Single Sign-On session (and *all* applications).

#### **Time Out/Unauthorized**

When the Equipment Health View session has been idle for 30 minutes, messages similar to Exhibit 4 are displayed. You must log back into EHV to continue working. You may see the red prompting messages if you don't have permissions to view or submit information from respective applications.

Exhibit 4. Timeout/Unauthorized Messages



### **Using Equipment Health View**

Equipment Health View is a dashboard-style interface that enables you to see pertinent information from various Railinc applications at a glance. Information from different applications is displayed in *portlets* as shown below.

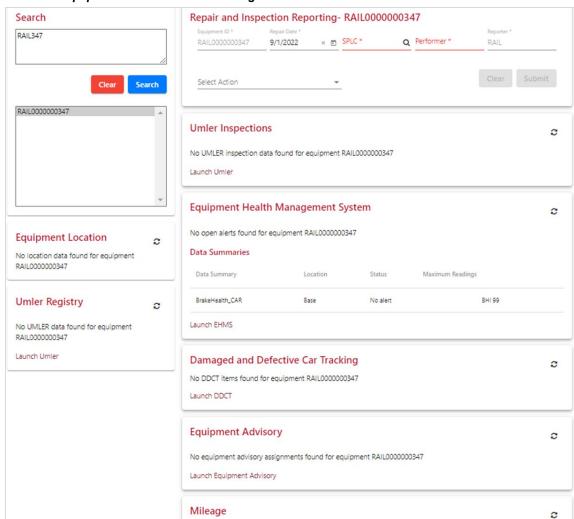


Exhibit 5. Equipment Health View Home Page Search Results

Certain portlets enable you to launch the source application for the portlet. To do this, select the launch link at the bottom of the portlet. If you have authorization, the source application opens, and you can use that application. If you do not have authorization, an SSO Unauthorized Access Attempt Warning is displayed.

A system error has occurred, please try again. If you continue to receive this error contact Railinc Support.

The following applications are available to launch from EHV:

- Umler
- EHMS
- DDCT
- Equipment Advisory

**Hint:** Click the launch link to open the application in a new browser window.

To return from a linked application, select the Launch Pad link at the top of the application, reselect **Equipment Health View**. The most recent search remains.

Several portlets have a refresh icon ( in the upper right corner. Select the icon to refresh the contents of that portal.

The following sections describe EHV functionality:

- Using the Search Portlet
- Using the Equipment Location Portlet
- Using the Umler Registry Portlet
- Using the Repair and Inspection Reporting Portlet
- <u>Using the Umler Inspections Portlet</u>
- Using the Equipment Health Management System Portlet
- Using the Equipment Advisory Notices Portlet
- Using the Damaged and Defective Car Tracking Portlet
- Using the Mileage Portlet
- Accessing the User Guide

7

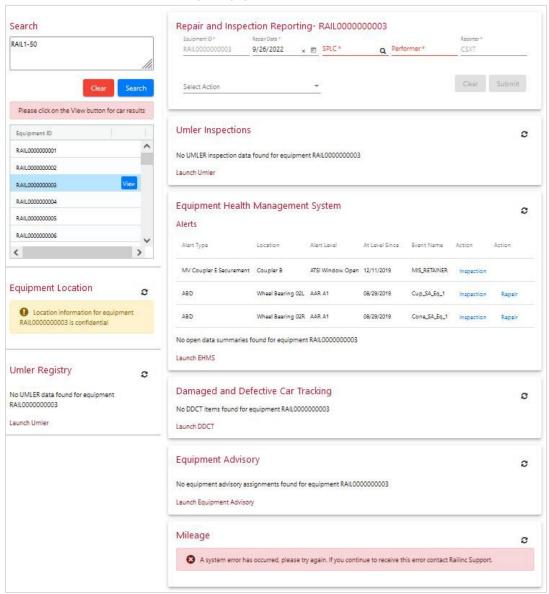
### **Using the Search Portlet**

To use the Search portlet to search for a specific piece of equipment or a range of equipment:

1. Type an Equipment ID or a range of Equipment IDs in the Search box and select **Search**. Results found are shown below.

**Note:** You can view up to 200 IDs in the results list. Wildcards are not supported.

Exhibit 6. Search Results for Multiple Equipment IDs



When a range is submitted, the equipment list displays below the Search portlet. Data obtained for the *first* Equipment ID in the list is displayed in the other portlets.

To view information for a different Equipment ID in the equipment list, scroll to a different ID and select the **View** button associated with that ID. The data is refreshed in the other portlets.

2. To execute a new search, overtype the Search field and select the **Search** button.

### **Using the Equipment Location Portlet**

The Equipment Location portlet displays equipment location information from the Event Repository. This portlet displays the location (city/state) and last move information to the car owner.

Exhibit 7. Equipment Location Sample



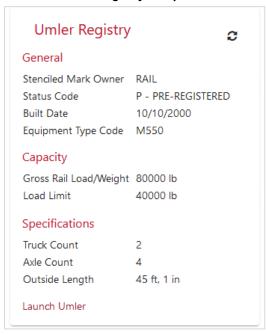
**Note:** If no events have been reported, the Equipment Location portlet displays the following message: No location data found for equipment [RAIL0000000347].

If you are not the car owner, the portlet displays "Location information for equipment <*car number*> is confidential".

### **Using the Umler Registry Portlet**

The Umler Registry portlet displays information about the searched Equipment ID. Content varies based on the information available from Umler.

Exhibit 8. Umler Registry Sample



**Note:** Other than launching Umler, no actions are available from this portlet.

To view the complete data for the selected Equipment ID, select the **Launch Umler** link at the bottom of the portlet and query the Equipment ID. Refer to the <u>Umler User Guide</u> for information about performing an Equipment ID query in Umler.

### **Using the Repair and Inspection Reporting Portlet**

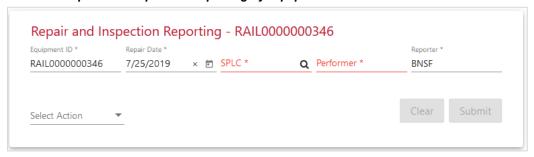
The Repair and Inspection Reporting portlet enables authorized users to submit various inspections and repairs, including multiple entries that can be submitted at the same time (Exhibit 19 and Exhibit 20), and requires EHMS Generic Access and EHMS Car Repair History permissions.

This portlet can be used in two different ways:

- 1) Choose the Select Actions dropdown to select repairs or inspections.
- 2) This portlet is automatically invoked when you select an Inspection or Repair link in another portlet.

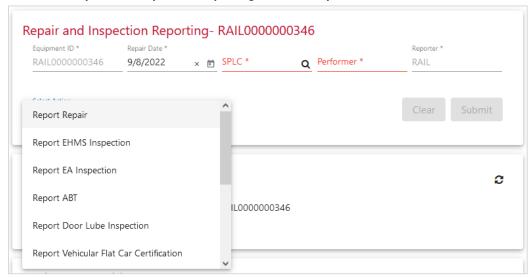
For all entries, the default input fields (Equipment ID, Repair Date, SPLC, Performer, and Reporter) are required. Equipment ID and Reporter are defaulted to selected equipment and the <u>User Mark Selection</u> when opening EHV.

Exhibit 9. Repair and Inspection Reporting by Equipment ID Form



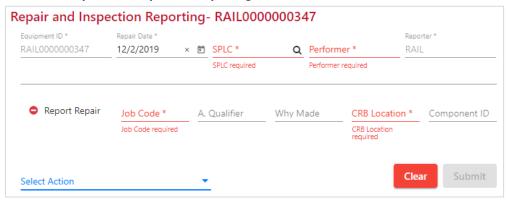
The various repairs or inspections can be selected from the Select Action drop-down.

Exhibit 10. Repair and Inspection Reporting Actions Drop-Down



When an action is selected, entry fields open between the default input fields in the portlet and the **Select Action** drop-down.

Exhibit 11. Repair and Inspection Reporting Action Selected



#### **General Interface Description:**

- The type of action is indicated at the left (EHMS Repair).
- For all entries, the default input fields (Equipment ID, Repair Date, SPLC, Performer, and Reporter) are required.
- If action was selected in error, it can be removed using the minus icon (a) at the left.
- The **Submit** button submits the input to the appropriate system.
- The Clear button removes all selected actions from the portlet (*including processed actions*).
- Input fields for each action vary. These are described in the following sections:
  - Report Repair
  - Report EHMS Inspection
  - Report Equipment Advisory Inspection

#### **Umler Inspections:**

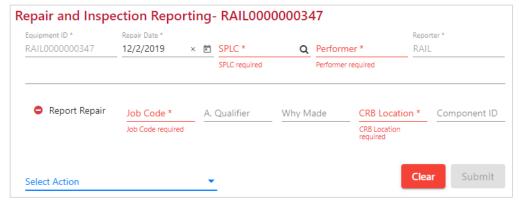
- Report ABT all these are the same as Report ABT:
  - o Report Door Lube Inspection
  - Report Vehicular Flat Car Certification
  - Report Autorack Certification
  - o Report Autorack Repair
  - Report Reflectorization Event
- Report Autorack Inspection
- Report Car Grade Inspection

### **Report Repair**

**Note:** You must have CRB and/or EHMS Car Repair History SSO permissions to report car repairs.

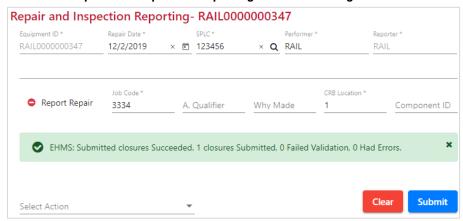
When you select **Report Repair** from the drop-down, the Report Repair fields are displayed.

Exhibit 12. Repair and Inspection Reporting Report Repair Form



- 1. Use the calendar icon ( ) to select the **Repair Date** to be reported.
- 2. Type in the **SPLC** where the repair was done or use the lookup icon (Q) to search for the SPLC.
- 3. Type in the MARK of the **Performer** (e.g., a shop mark).
- 4. The **Reporter** defaults to your company.
- 5. Complete the following fields in accordance with the AAR Field Manual and the AAR Office Manual:
  - a. Job Code
  - b. (conditional) Applied Qualifier
  - c. (conditional) Why Made
  - d. CRB Location
  - e. (conditional) Component ID—from Umler Component Registry
- 6. When the input fields are complete, select **Submit**. The portlet displays the reported repair (Exhibit 13) and success or error messages. For errors messages (error messages are in red), correct the inputs and **Submit** again. For more message examples, see Exhibit 19 and Exhibit 20.

Exhibit 13. Repair and Inspection Reporting Success Message

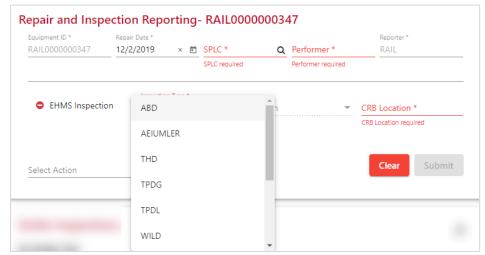


No further edits can be done to the submitted entry. A new action can be selected.

### **EHMS Inspection**

When you select **Report EHMS Inspection** from the **Select Action** drop-down, the EHMS Inspection fields are displayed.

Exhibit 14. Repair and Inspection Reporting EHMS Inspection Form



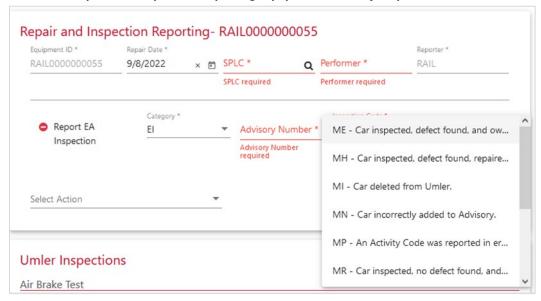
- 1. Use the calendar icon ( ) to select the **Repair/Inspection Date** to be reported.
- 2. Type in the **SPLC** where the repair was done or use the lookup icon (Q) to search for the SPLC.
- 3. Type in the MARK of the **Performer** (e.g., a shop mark).
- 4. The **Reporter** defaults to your company.
- 5. Select the **Inspection Type and Reason**. Refer to the <u>EHMS User Guide</u> and the *AAR Field Manual*.

- 6. Type in the **CRB location** (refer to AAR Field Manual, Rule 83).
- 7. When the input fields are complete, select **Submit**. The portlet displays the reported repair (similar to Exhibit 13).

### **Equipment Advisory Inspection**

When you select **Report EA Inspection** from the drop-down, the Equipment Advisory Inspection fields are displayed.

Exhibit 15. Repair and Inspection Reporting Equipment Advisory Inspection Form

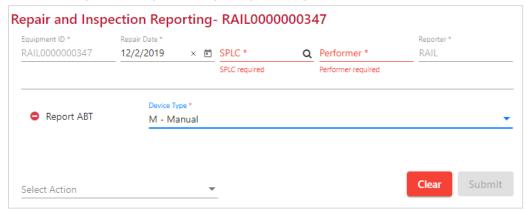


- 1. Use the calendar icon ( ) to select the **Repair/Inspection Date** to be reported.
- 2. Type in the SPLC where the repair was done or use the lookup icon (Q) to search for the SPLC.
- 3. Type in the MARK of the **Performer** (e.g., a shop mark).
- 4. The **Reporter** defaults to your company.
- 5. Select the Equipment Advisory Category (EI, IN, or SH).
- 6. Enter the **Advisory Number**.
- 7. Select the **Inspection Code**. Refer to the *Equipment Advisory User Guide*.
- 8. When the input fields are complete, select **Submit**. The portlet displays the reported repair (similar to Exhibit 13).

### **ABT Inspection**

When you select **Report ABT** from the drop-down, the Report ABT fields are displayed (<u>Exhibit</u> <u>16</u>).

Exhibit 16. Repair and Inspection Reporting ABT Inspection Form



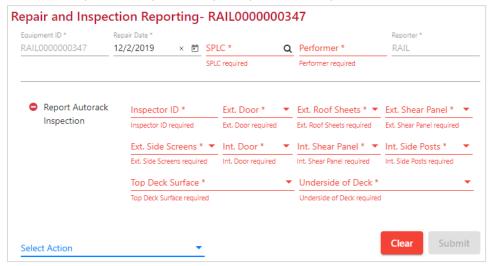
**Note:** This interface is also used for the following:

- Door Lube
- Vehicular Flat Car Certification
- Autorack Certification
- Autorack Repair
- Reflectorization Event
- Autorack Inspection
- Car Grade Inspection
- 1. Use the calendar icon ( ) to select the **Inspection Date** to be reported.
- 2. Type in the **SPLC** where the repair was done or use the lookup icon (Q) to search for the SPLC.
- 3. Type in the MARK of the performer (e.g., a shop mark).
- 4. The Reporter defaults to your company.
- 5. Select the Device Type (Manual, Automatic, or 4-Port) refer to the <u>Umler User Guide</u> for more information on device types.
- 6. When the input fields are complete, select **Submit**. EHV displays the reported inspection (similar to Exhibit 13). You can then select new actions.

### **Autorack Inspection**

When you select **Autorack Inspection** from the drop-down, the Report Autorack Inspection fields are displayed (Exhibit 17).

Exhibit 17. Repair and Inspection Reporting Autorack Inspection Form

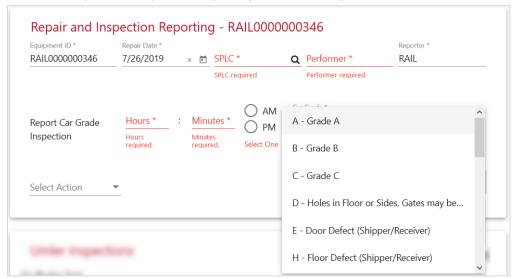


- 1. Use the calendar icon ( ) to select the **Inspection Date** to be reported.
- 2. Type in the **SPLC** where the repair was done or use the lookup icon (Q) to search for the SPLC.
- 3. Type in the MARK of the performer (e.g., a shop mark).
- 4. The Reporter defaults to your company.
- 5. Enter the Inspector's ID.
- 6. Enter the inspector's grades for each of the nine specified car parts/areas. Refer to the <u>Umler User Guide</u> for more information.
- 7. When the input fields are complete, select **Submit**. The portlet displays the reported inspection (similar to Exhibit 13).

### **Car Grade Inspection**

When you select **Car Grade Inspection** from the drop-down, the Report Car Grade Inspection fields are displayed.

Exhibit 18. Repair and Inspection Reporting (Car Grade Inspection)



- 1. Use the calendar icon ( ) to select the **Inspection Date** to be reported.
- 2. Type in the **SPLC** where the repair was done or use the lookup icon (Q) to search for the SPLC.
- 3. Type in the MARK of the performer (e.g., a shop mark).
- 4. The Reporter defaults to your company.
- 5. Enter the Inspection Time in 12-hour format.
- 6. Select AM or PM.
- 7. Select the inspector's car grade from the drop-down. Refer to <u>Umler User Guide</u>.
- 8. When the input fields are complete, select **Submit**. The portlet displays the reported inspection (similar to Exhibit 13).

### **Multiple Actions in One Submission**

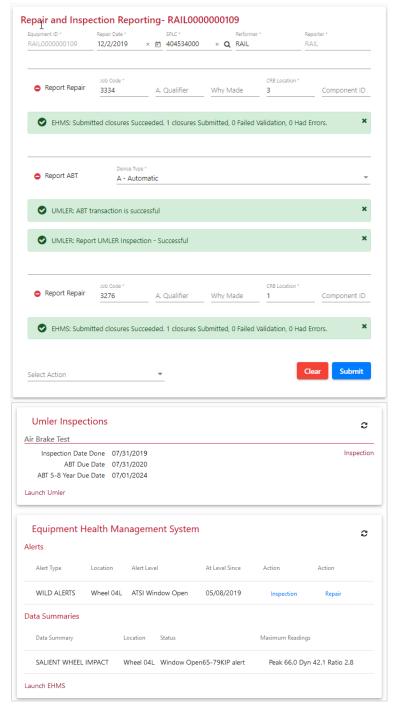
You can enter both repairs and various inspections in a single submission within the Repair and Inspection Reporting portlet (by selecting **Select Action**), or by selecting a **Repair** or **Inspection** link in another portlet. Exhibit 19 shows one Umler inspection selected using the link within the portlet and two repairs selected from the Select Action drop-down in the Repair and Inspection Reporting portlet with all required data—ready for submission.

Repair and Inspection Reporting-RAIL0000000109 Repair Date \* 12/2/2019 × 🗂 123456 × Q RAIL Job Code \* CRB Location \* Report Repair 3334 A. Qualifier Why Made Component ID Report ABT Job Code \* CRB Location \* Report Repair 3276 A. Qualifier Why Made Component ID Select Action **Umler Inspections** C Air Brake Test ABT Due Date 11/21/2016 Inspection ABT 5-8 Year Due Date 11/21/2016 Launch Umler **Equipment Health Management System** C Alerts Alert Type Location Alert Level At Level Since Action WILD ALERTS Wheel 01L AAR Condemnable 05/08/2019 WILD ALERTS Wheel 04L ATSI Window Open 05/08/2019 Repair **Data Summaries** Data Summary Location Status Maximum Readings SALIENT WHEEL IMPACT Wheel 04L Window Open65-79KIP alert Peak 66.0 Dyn 42.1 Ratio 2.8 SALIENT WHEEL IMPACT Wheel 03L No alert Peak 60.0 Dyn 40.0 Ratio 3.0 SALIENT WHEEL IMPACT Wheel 01R No alert Peak 61.2 Dyn 36.1 Ratio 2.4 SALIENT WHEEL IMPACT Wheel 01L Condemnable alert Peak 95.8 Dyn 83.2 Ratio 7.6 Launch EHMS

Exhibit 19. Multiple Repairs and Inspection Ready for Submission

Exhibit 20 shows the portlet after submission. The messages with green check icons show that the transactions were successful, and closures executed. Look for responses from the application portlets, and you may need to refresh each portlet to view updates. In this example, the other portlets reflect recent updates (Umler), or removal of completed transactions (only one alert remains in EHMS).





Although no further actions can be taken on the submitted repairs and inspections, you can enter additional inspections or repairs by using the **Select Action** drop-down, or by selecting a link in another portlet.

If the Repair and Inspection Reporting portlet becomes crowded, select **Clear** to remove the entries (whether processed or not).

### **Using the Umler Inspections Portlet**

The Umler Inspections portlet displays Umler Inspection information. Inspections are listed by type.

Exhibit 21. Umler Inspections Sample



**Note:** When you select an **Inspection** link, the Repair and Inspection Reporting portlet opens the corresponding inspection entry field to allow you to input a new inspection (refer to Exhibit 16 after selecting the Inspection link for ABT).

Select the refresh icon ( ) to update the Umler Inspections portlet after submitting inspections.

To view the complete data for the selected Equipment ID, select the **Launch Umler** link at the bottom of the portlet and query the Equipment ID. Refer to the <u>Umler User Guide</u> for information about performing an Equipment ID query in Umler.

## Using the Equipment Health Management System Portlet

The Equipment Health Management System portlet displays EHMS alerts and data summaries for the highlighted Equipment ID. A typical listing of alerts and data summaries is shown in <a href="Exhibit 22"><u>Exhibit 22</u></a>.

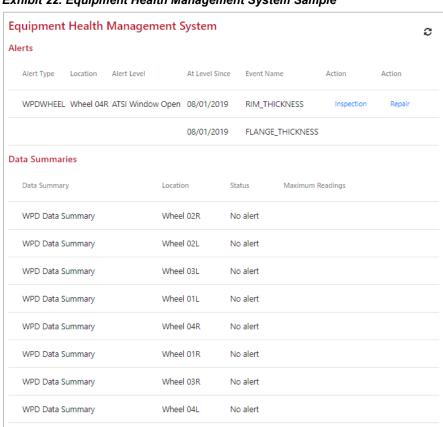


Exhibit 22. Equipment Health Management System Sample

**Note:** When you select an **Inspection** link, the Repair and Inspection Reporting portlet opens the EHMS Inspection entry field to enable you to input a new inspection (see <u>Exhibit 14</u>). When the **Repair** link is selected, the Repair and Inspection Reporting portlet opens the Report Repair entry field to enable you to input a new repair (see <u>Exhibit 12</u>).

Select the refresh icon ( ) to update the EHMS portlet after submitting inspections or repairs.

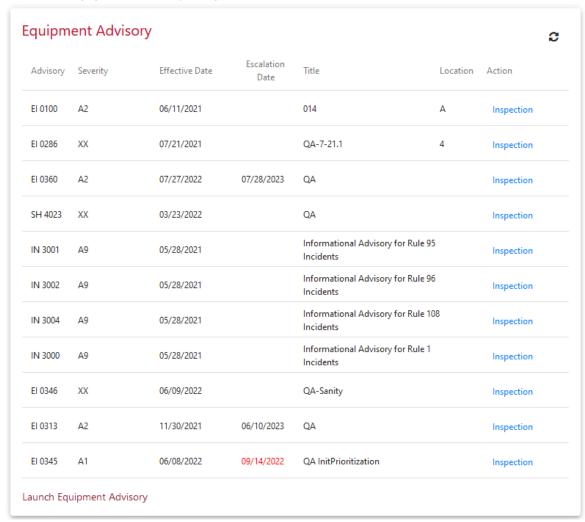
To view the complete EHMS data for the selected Equipment ID, select the **Launch EHMS** link at the bottom of the portlet and query the Equipment ID in EHMS. Refer to the *EHMS User Guide* for more information about EHMS Equipment ID queries as well as details about EHMS alerts and data summaries.

Launch EHMS

### **Using the Equipment Advisory Notices Portlet**

The Equipment Advisory Notices portlet displays Equipment Advisory notices for the highlighted Equipment ID. Representative Equipment Advisories are shown in Exhibit 23.

Exhibit 23. Equipment Advisory Sample



**Note:** When you select an **Inspection** link, the Repair and Inspection Reporting portlet opens the Equipment Advisory Inspection entry field to enable you to input a new inspection (refer to Exhibit 15).

Select the refresh icon ( ) to update the Equipment Advisory Notices portlet after submitting inspections or repairs.

To view the complete Equipment Advisory data for the selected Equipment ID, select the **Launch Equipment Advisory** link at the bottom of the portlet and query the Equipment ID. Refer to the *Equipment Advisory User Guide* for information about performing an Equipment ID query in Equipment Advisory.

### **Using the Damaged and Defective Car Tracking Portlet**

The Damaged and Defective Car Tracking portlet displays DDCT information if you are party to the incident as shown in <a href="Exhibit 24"><u>Exhibit 24</u></a>. If you are not party to the incident, no results are displayed.

Exhibit 24. Damaged and Defective Car Tracking Sample



**Note:** No actions are available from this portlet. You must report repairs in DDCT.

To view the complete DDCT incident data for the selected Equipment ID, select the **Launch DDCT** link at the bottom of the portlet and query the Equipment ID. Refer to the <u>DDCT User</u> <u>Guide</u> for information about Equipment ID queries and incident queries.

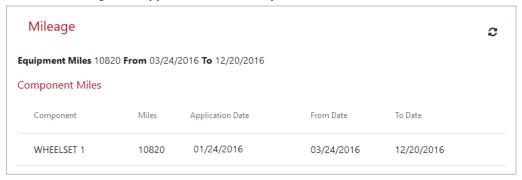
### **Using the Mileage Portlet**

The Mileage portlet displays mileage information from the Event Repository to the car owner. This portlet can show the actual computed mileage, "No Data", or "Very Few Miles" (if the data is confidential).

- Application Dt (Date) is the repair date reported by the customer.
- From Dt (Date) is the earliest recorded movement date
- To Dt (Date) is the latest recorded movement.

If Components have been added to an Equipment ID, mileage and dates of component application are shown (Exhibit 25).

Exhibit 25. Mileage with applied Wheelset Components



**Note:** This information is confidential and is only available to the car owner. No actions other than sorting are available from this portlet. You can obtain detailed component data from Umler. Refer to the *Umler User Guide* and the *Component Tracking User Guide* for more information.

### **Accessing the User Guide**

To open the user guide for Equipment Health View, select **User Guide** from the menu bar. The user guide opens in a new browser window. You can view, search, or print the user guide. When finished, close the browser window ( $\times$ ) to return to the Home page.

**Note:** Other reference materials (webinar slides, demos, and FAQs) are also available on the Railinc web portal at <a href="https://public.railinc.com/products-services/equipment-health-view">https://public.railinc.com/products-services/equipment-health-view</a>.

### **Glossary**

**AAR**—Association of American Railroads

**DDCT**—Damaged and Defective Car Tracking system. A damaged car is one governed by Interchange Rule 107. Such cars are badly damaged or destroyed. A defective car is one governed by Interchange Rule 108. Such cars require general repairs in excess of 36 hours including trucks or 25 hours excluding trucks.

EHMS—Equipment Health Management System.

**Equipment Advisory**—System that handles AAR Equipment Advisory notices.

**Equipment Health View (EHV)**—A dashboard-style application that provides data from several Railinc applications regarding the health status for specified equipment IDs.

**Event Repository**—Railinc database of train movements and billing data.

**Mileage**—Mileage information from the Event Repository. Can also show mileage and dates of component application.

Repair Service—Railinc process that sends data from EHV to the corresponding Railinc system.

Umler®—Universal Machine Language Equipment Register (UMLER)

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