Rail Document Interchange (RDI) User Guide

RAILINC

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Table of Contents

List of Exhibits

Learning about Rail Document Interchange

Rail Document Interchange (RDI) is the central repository for all documentation required to safely travel on foreign tracks. The purpose of RDI is to centralize the storage of safety documentation for the Rail Industry while providing timely and accurate exchange of safety rule documents between interline partners to increase the safety of train crew members.

Overview

RDI enables railroad safety documentation teams to distribute and receive safety documents required by foreign line crews. Foreign carrier personnel automatically and immediately receive updated operational safety documents from the host road. Document updates are pushed from the publishing road to the central document exchange and repository and are then immediately routed to the impacted foreign carriers. The safety document can then be consumed by the foreign railroad's current documentation system; giving affected crews immediate access to the proper safety documents on their internal systems.

RDI provides the following benefits:

- Provides timely and accurate exchange of safety operating rules documents between interline partners, which increases the safety of the Engineer/Conductor.

- Reduces administrative efforts to distribute safety rules to foreign carriers.

- Reduces the amount of time trains are delayed from moving due to delays in acquiring current safety documentation.

- Builds a framework for extension and utilization in other areas of the industry.

- Reduces lack of delivery to recipients with a more accurate subscription management capability.

- Provides access to safety operating rules documents to the entire industry via web portal.

- Enables railroads to easily view and compare processes with other railroads.

- Formalizes the secure access to safety operating rules documents.

After securely logging into RDI, you can search, view, and download any documents published in the repository. You can also upload and delete documents for your carrier as well as manage subscriptions for your carrier.

This document describes how to use RDI through the following major sections:

- Getting Started describes how to access and log in to the system.

- Viewing Recently Updated and New Documents describes how to use the Home page to view recently updated documents to which you are subscribed and newly added documents to which you are not subscribed.

- Working with Subscriptions describes how to create and manage subscriptions to documents uploaded by other carriers.

- [Searching for Documents in RDI](#) describes how to search RDI for documents that meet search criteria you specify.

- [Managing Documents in RDI](#) describes how to browse folders and files in RDI as well as manage your carrier's folders and files.

For additional information, contact the Railinc Customer Success Center (see [Accessing the Railinc Customer Success Center](#)).

System Requirements

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

Accessing the Railinc Customer Success Center

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

Getting Started

Access the Rail Document Interchange application by using Railinc's Single Sign-On (SSO), a web application that provides convenient access to a variety of Railinc products. If you have an SSO login, go to the Railinc portal at https://public.railinc.com/ and select the **Customer Login** link in the top right corner. Enter your user ID and password in the fields and select **Sign In**.

Registering to Use Railinc SSO

Each RDI user must register to use Railinc Single Sign-On. If you are not already registered, refer to the *Railinc Single Sign-On User Guide* for more information. Once you have completed SSO registration, request access to RDI within SSO.

Requesting Access to RDI

After you receive authorization to use Railinc SSO, you must request general access to RDI by following instructions in the *Railinc Single Sign-On User Guide*.

Your level of access and authorization for RDI is determined when you request access through Railinc Single Sign-On. Exhibit 1 shows a complete list of RDI roles as seen in SSO.

Exhibit 1. User Roles and Tasks

Task	Description
RDI Safety Operations User	This role enables Rail Document Interchange (RDI) users to create and manage subscriptions, search for documents, and manage folders and files. Users must request access under the mark for which they want to receive access.

Your assigned user role determines what functions you can perform. User roles are assigned by Railinc through the Single Sign-On interface (Exhibit 2).

Exhibit 2. RDI Request Permission

Once you receive email notification of access to RDI, you can log on and begin using RDI.

Logging In

Use the following procedure to log into Rail Document Interchange:

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

2. Select the **Customer Login** link in the upper right of the page. The Account Access page is displayed.

Exhibit 3. Railinc Login
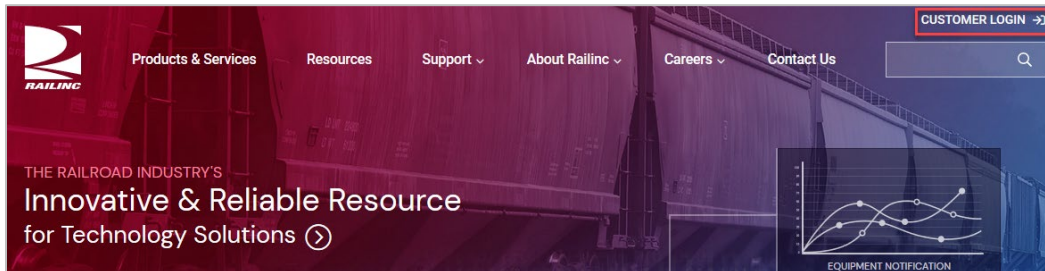
3. In the Customer Login panel, enter your User ID and Password. Select **Sign In**. The Railinc Launch Pad is displayed.
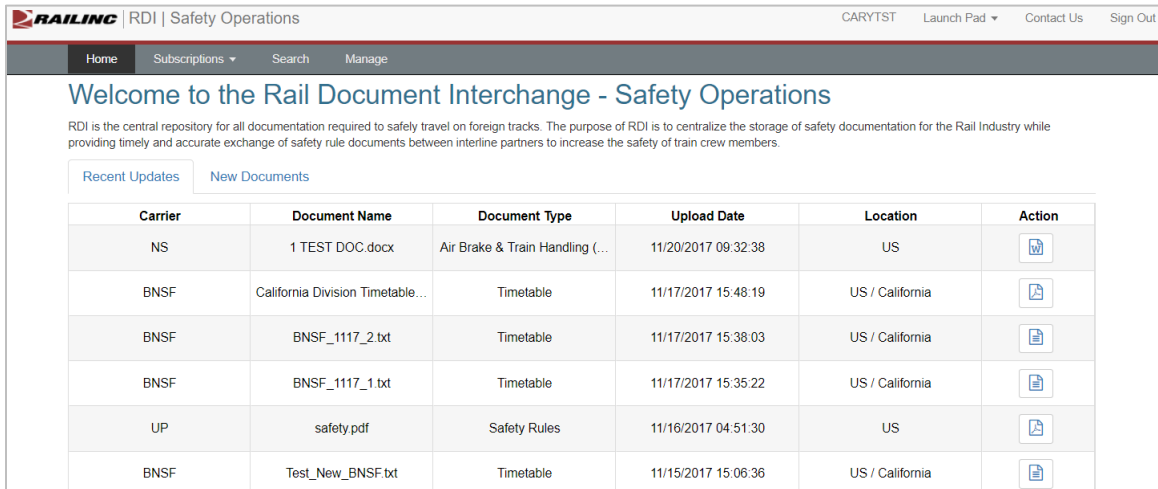
Exhibit 4. Railinc Launch Pad
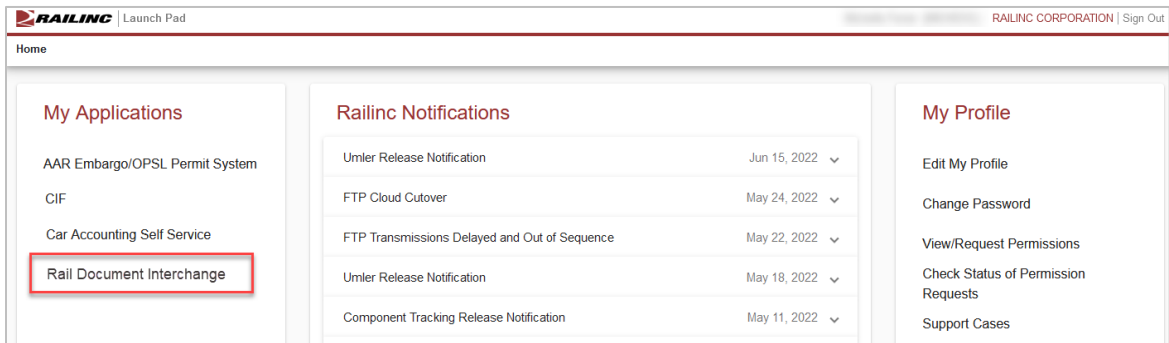
4. Under My Applications, select **Rail Document Interchange**. The Rail Document Interchange (RDI) Home page is displayed (Exhibit 5).

Exhibit 5. Rail Document Interchange (RDI) Home Page (Recent Updates Tab)

Continue by selecting one of the following RDI menu options:

Home   View lists of recent updates to subscribed documents as well as newly uploaded unsubscribed documents.

Subscriptions   Create new subscriptions and manage active subscriptions.

Search   Search for documents.

Manage   Browse folders and manage files in folders owned by your carrier.

Logging Out

Select the **Sign Out** link to end an RDI session.

Viewing Recently Updated and New Documents

On the Home page, RDI has two tabs: Recent Updates and New Documents.

The Recent Updates tab, which is displayed by default, shows a list of documents to which you are currently subscribed that have been updated within the past week. You can view these documents by selecting the View File icon in the Action column. Exhibit 5 shows an example of the **Recent Updates** tab.

Select the **New Documents** tab to see a list of documents added within the past month to which you are not subscribed (Exhibit 6).

Exhibit 6. Rail Document Interchange (RDI) Home Page (New Documents Tab)

Carrier	Document Name	Document Type	Upload Date	Location	Action
NS	Bulletin2_155.pdf	Bulletin	11/20/2017 13:36:30	US / Central / CHICAGO …	
NS	Bulletin2.pdf	Bulletin	11/20/2017 13:35:40	US / Central / CHARLES…	
NS	test.txt	Bulletin	11/20/2017 13:16:32	US / Dearborn / DAYTON…	
NS	new2.pdf	Bulletin	11/20/2017 12:54:11	US / Alabama / Allentown…	
NS	new1.pdf	Bulletin	11/20/2017 12:47:27	US / Alabama	
NS	Bulletin1.pdf	Bulletin	11/20/2017 11:27:16	US / Alabama / ALBANY …	
KCS	KCS_ABTH	Air Brake & Train Handlin…	11/20/2017 11:07:02	US	
CN	RDITestDoc-1.txt	System Bulletin	11/20/2017 11:06:50	US	
CN	RDITestDoc-16.txt	System Bulletin	11/20/2017 11:06:47	US	
CN	RDITestDoc-15.txt	System Bulletin	11/20/2017 11:06:45	US	

You can view a document by selecting the View File icon in the Action column. You can subscribe to a document by selecting the Subscribe icon (✔) in the Action column.

Note: The Location column shows the physical locations to which the document is applicable.

Working with Subscriptions

You can subscribe to documents to be notified when changes occur to those documents. RDI enables you to create new subscriptions and manage your existing subscriptions. See the following sections for more information:

- [Creating New Subscriptions](#)

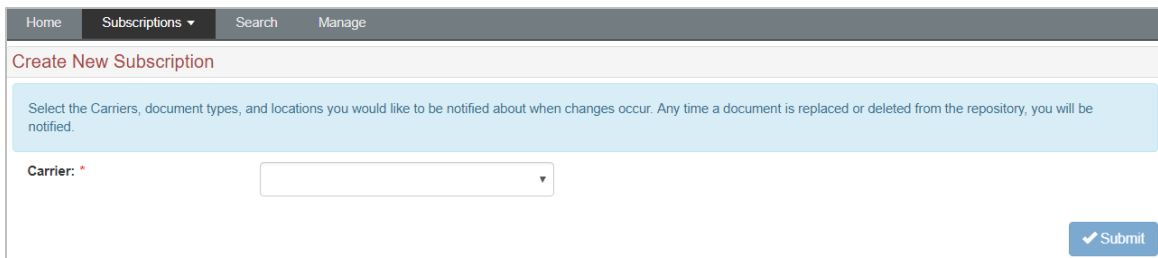- [Managing Your Subscriptions](#)

Creating New Subscriptions

You can create subscriptions to safety documents that have been uploaded by other carriers. You can subscribe to all documents or specific types of documents as well as documents that are only applicable to specific locations.

Note: You can only have one subscription per carrier.

Use the following procedure to create a new subscription:

1. Select **Subscriptions > Create New Subscription** from the RDI menu bar. The Create New Subscription page is displayed ([Exhibit 7](#)).

Exhibit 7. Create New Subscription Page

2. Select the carrier to whose document(s) you want to subscribe. The Create New Subscription page expands with fields that enable you to specify the documents to which you want to subscribe ([Exhibit 8](#)).

Exhibit 8. Create New Subscription Page (with carrier selected)

3. Select checkbox(es) in the Country field to indicate the countries to whose safety documents you want to subscribe.

4. Select checkbox(es) in the System Documents field to indicate the types of safety documents to which you want to subscribe.

5. If you want to subscribe to documents that are applicable to specific locations, select checkbox(es) in the Location-Specific Documents field to indicate your subscription preferences. Depending on your selections, additional location-specific fields are displayed, which enable you to further refine your subscription preferences.

6. Type a descriptive name for the new subscription in the Subscription Name field.

7. Select **Submit**. Your subscription is saved and activated. The Manage Active Subscriptions page is displayed (see Managing Your Subscriptions).

Managing Your Subscriptions

Select **Subscriptions > Manage Active Subscription** from the RDI menu bar to manage your subscriptions to other carriers' documents. The Manage Active Subscriptions page is displayed (Exhibit 7).

Exhibit 9. Manage Active Subscriptions

Home	Subscriptions ▾	Search	Manage

<div align="center">

Manage Active Subscriptions

</div>

Subscriptions

Carrier	Subscription Name	Document(s)	Location	Action
BNSF	BNSF_NS	HAZMAT Timetable General Order	California Heartland / Bayard	+ ✎ ✖ ↻
KCS	KCS_NS	Safety Rules	Division 1 / Subdivision 1 Division 2 / Subdivision 2	+ ✎ ✖ ↻
CSXT	CaryUSOperatingRules	Operating Rules		+ ✎ ✖ ↻
NS	NS	Operating Rules		+ ✎ ✖ ↻
UP	RAIL-UP	Safety Rules General Order	dallasftworth / dallasftworth	+ ✎ ✖ ↻

The Manage Active Subscriptions page displays all the active subscriptions for your carrier. This page displays one row for each subscription, and allows you to select actions to perform for each subscription. Select an icon in the Action column to perform the following tasks for the subscription contained in the selected row:

➕ Expand the row to show additional documents and/or locations included in the subscription.

✎ Edit (modify) the existing subscription. The Edit Subscription page is displayed. This page is essentially the same as the Create New Subscription page except that the carrier cannot be modified (Creating New Subscriptions).

✖ Delete an existing subscription from your carrier to another carrier's documents. A confirmation pop-up is displayed.

↻ Sync the documents included in the subscription. Syncing pushes the most recent version of all the documents included in the subscription to you (either via an established web service or email). A confirmation pop-up is displayed.

Searching for Documents in RDI

Select **Search** from the RDI menu bar to search for and view any documents contained in the RDI repository for any foreign carrier. The Search Documents page is displayed (Exhibit 10).

Exhibit 10. Search Documents Page

Complete the fields you need to locate the documents for which you are searching (there are no required fields):

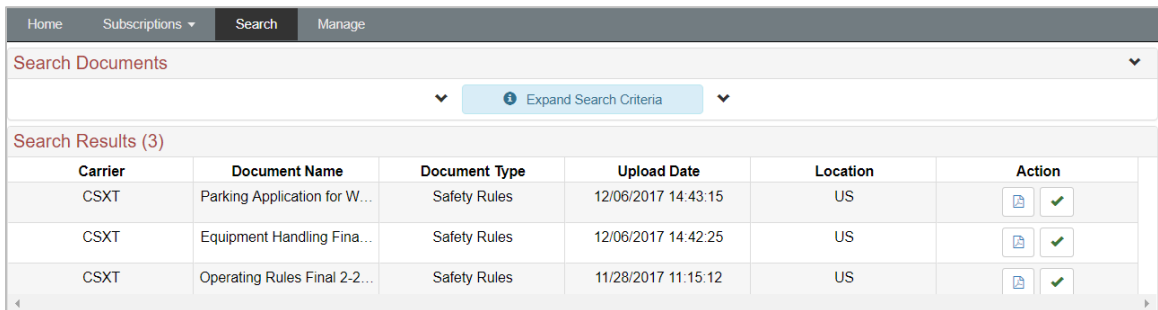|	
Carrier	Select the foreign carrier(s) whose documents you want to locate. You can select multiple carriers by using Ctrl+Select and/or Shift+Select. If you select multiple carriers, any location-specific search criteria you specify are ignored.
Subscription Status	Select **All**, **Subscribed**, or **Not Subscribed** to indicate the status of the documents to locate.
Country	Select checkbox(es) to indicate the countries to include in the search.
System Documents	Select checkbox(es) in the **System Documents** section to indicate the types of system-wide safety documents to include in the search.
Location-Specific Documents	Select checkbox(es) in the **Location-Specific Documents** section to indicate the types of safety documents that are applicable to specific locations to include in the search. Depending on your selections, additional location-specific fields are displayed, which enable you to further refine your search criteria.

Document Name / ID	Enter a specific document name (or part of a document name) or a document ID to include in the search. Searching using this method returns any documents whose name contains the text you specify.
Upload Date From	Use the calendar icon to select the earliest upload date to include in the search.
Upload Date To	Use the calendar icon to select the most recent upload date to include in the search.

Once you have entered your search parameters, select **Search**. Your search results are displayed (Exhibit 11).

*Exhibit 11. Search Documents Page (showing Search Results)*

The Search Results section shows the documents that met the criteria you specified. You can select ⌄ to view and modify your search criteria. Select an icon in the Action column to perform the following tasks for a document listed in the selected row:

View the document listed in the Search Results.

Subscribe to an unsubscribed document listed in the Search Results.

Managing Documents in RDI

Select **Manage** from the RDI menu bar to view folders and files in RDI. The Manage Folders and Files page is displayed (Exhibit 12).

Exhibit 12. Manage Folders and Files Page
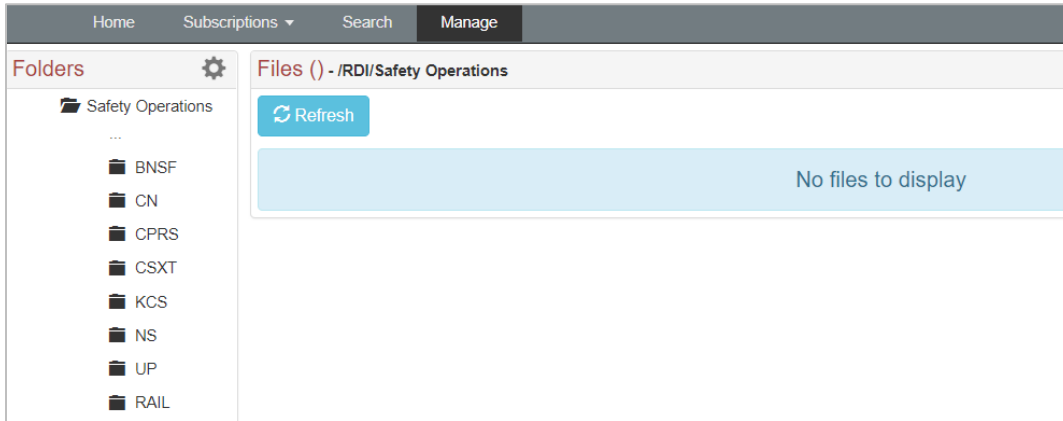
The tasks you can perform depend on whether your carrier owns the folders and files. See the following sections:

- Browsing Other Carriers' Folders and Files

- Managing Your Carrier's Folders and Files

Browsing Other Carriers' Folders and Files

The Manage Folders and Files page enables you to browse any and all folders in RDI – there are no restrictions. Select a carrier's folder to see folders and files owned by that carrier (Exhibit 13).

Exhibit 13. Manage Folders and Files Page (Folders and Files Owned by another Carrier)
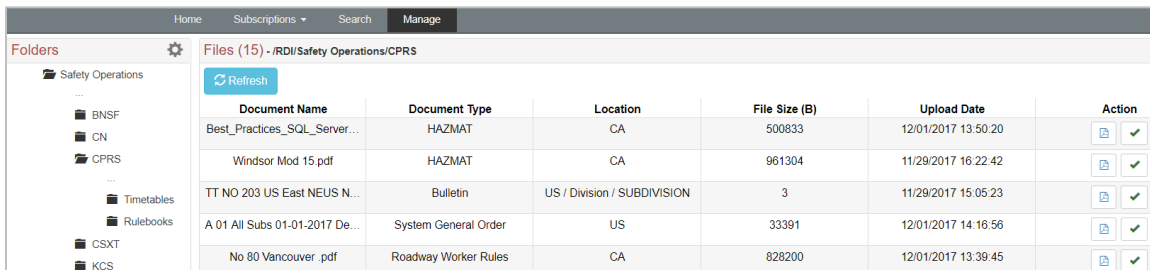

If you do not represent the carrier that owns the folder, the only tasks you can perform are to select **Refresh** to update the display of folder contents, or select the View File (📄) or Subscribe (✔) icons in the Action column.

Managing Your Carrier's Folders and Files

If you represent the carrier that owns the folder you are viewing (shown below in Exhibit 14), you can perform several management tasks.

Exhibit 14. Manage Folders and Files Page (Folders Owned by your Carrier)
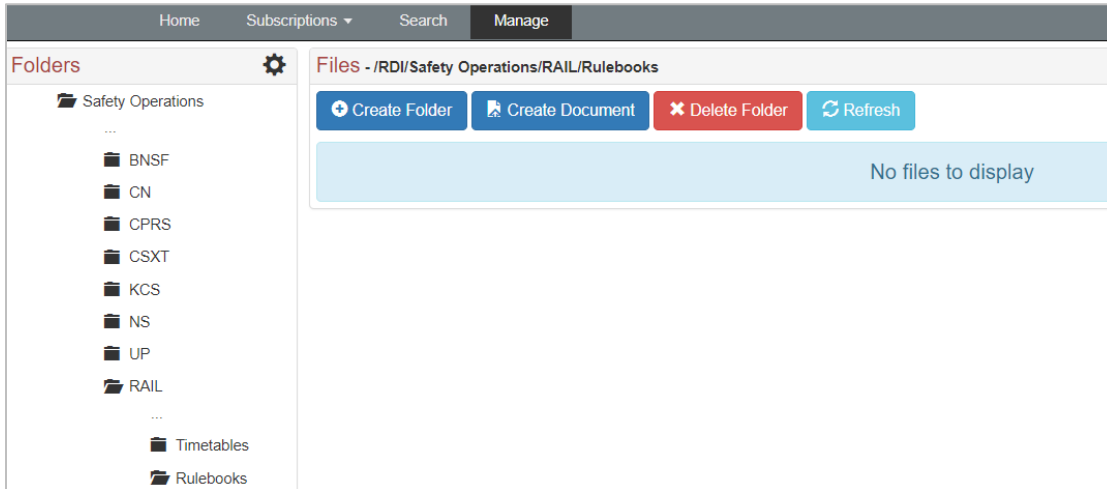
When working with a folder owned by your carrier, you can select the following task buttons:
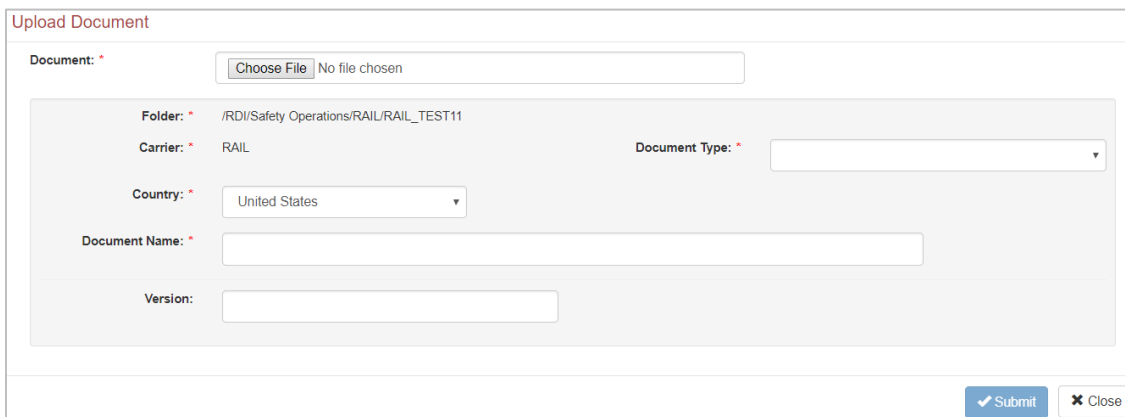
Create Folder   Create a folder as a subfolder to the currently selected folder.

Create Document   Create (upload) a document of any filetype in the currently selected folder.

Delete Folder   Delete the currently selected folder. The folder must be empty before you can delete it.

Refresh   Update the display of folder contents.

You can also select the Download Subscribers icon (⚙) to download a CSV file containing a list of all foreign roads who have subscribed to any of your documents.

Creating (Uploading) a Document

You can create (upload) a new document in any folder owned by your carrier. From the Manage Folders and Files page, select a folder owned by your carrier, and then select **Create Document**. The Upload Document pop-up is displayed (Exhibit 15).

Exhibit 15. Upload Document Pop-up

Upload Document

Document: *	Choose File No file chosen	
Folder: *	/RDI/Safety Operations/RAIL/RAIL_TEST11	
Carrier: *	RAIL	Document Type: * ▾
Country: *	United States ▾	
Document Name: *		
Version:		

✔ Submit ✖ Close

Complete the fields in the Upload Document pop-up:

1. Select **Choose File** and locate the file you want to upload to RDI.

2. Use the **Document Type** drop-down list to select the document type. If you select a system-wide document type, you are not required to add division or subdivision information. If you select a location-specific document type, you are required to add a division (subdivision information is optional).

3. Use the **Country** drop-down list to select the country to which the document is applicable.

4. The **Document Name** is prepopulated with the file name, but you can modify as needed. Limit the document name to 50 characters, and only use alphanumeric characters, spaces, dashes, underscores, and periods.

5. Enter a **Division** (if a location-specific document type). Limit the division name to 50 characters, and only use alphanumeric characters, spaces, dashes, underscores, and periods.

6. Enter a **Subdivision** (optional for location-specific document types). Limit the subdivision name to 50 characters, and only use alphanumeric characters, spaces, dashes, underscores, and periods.

7. Optionally, enter the **Version** number. Note that the version number must be maintained manually by the uploader.

Select **Submit** to upload the new document and its properties to the RDI repository. The document is uploaded immediately.

Updating Documents Owned by Your Carrier

You can modify documents in any folder owned by your carrier (Exhibit 16).

Exhibit 16. Manage Folders and Files Page (Files Owned by your Carrier)
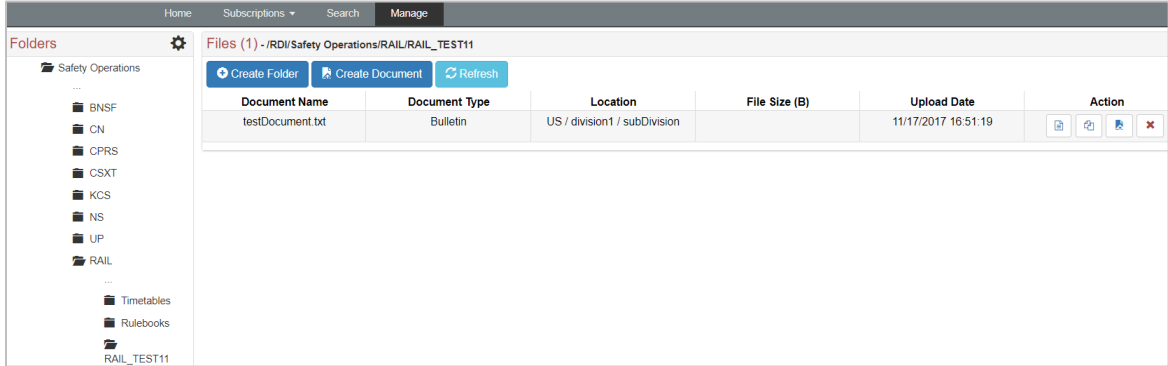
When you are working with files in a folder owned by your carrier, you can select the following icons in the Action column in the row associated with a file to perform tasks for that file:

📄 View the document/file.

🗐 Update the properties of the document. When you select the **Update Properties** icon, the Update Document pop-up is displayed (Exhibit 17). Make any needed updates to the properties and select **Submit**.

Exhibit 17. Update Document Pop-up (with the Update Properties Fields)

📄 Replace the content of the document. When you select the **Replace Content** icon, the Update Document pop-up is displayed (Exhibit 18). Select **Choose File** and locate an updated version of the document. Select **Submit** to replace the existing file with the updated file.

Exhibit 18. Update Document Pop-up (Choose File to Replace Content)

✘   Delete the document from RDI. Select the **Delete** icon to delete the document.