



## **Training Manual**

Version 1.0

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Also, for your convenience, there is **in-page navigation** in the orange boxes at the bottom of the page.



## Access CrewPro

### ACCESS INTENDED BROWSER



BECAUSE IT IS ON A CLOUD ENVIRONMENT, CREWPRO SHORT LINE CAN BE ACCESSED FROM MULTIPLE BROWSERS

1. Open intended browser
  - a. Clear the cache and browsing history using the applicable settings process
  - b. Input CrewPro URL into the address bar
  - c. <https://rgpcrewpro.pstechnology.com/#/>

### ADMINISTRATOR LOGIN



INITIALLY, THE ADMINISTRATOR WILL NEED TO DO SOME INITIAL SETUP TO ENABLE USERS ACCESS TO THE SYSTEM.

1. Access the login page.
2. Enter the administrator user id and password.
3. Click on the Login button.

### WHO USES IT?

Administrators are normally the initial users of the system. They will conduct initial setup of most of the administrative controls which will allow lower-level users

to add the functional data that will be needed for daily operations.

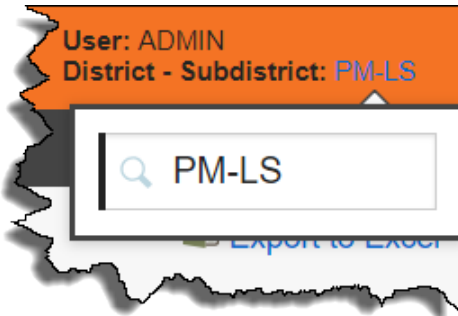
### SET USER LOCATION

If user locations were previously set up, the administrator will designate the area that they will be working in (DD-SD). If they are not yet set up, see the next section. Administrators do not need to select a DD-SD, but some features will not be accessible.

1. When prompted, enter the District-Subdistrict that will be the primary work area for the user.
2. Click on the Save button.
3. Verify that the proper User and DD-SD are displayed in the upper right-hand corner of the displayed Work List screen.
4. To edit/change the District-Subdistrict, click on the blue DD/SD in the upper right-hand corner of the screen. Enter the desired DD/SD in the field and if there are applicable selections displayed, click on the desired selection. Click on any part of the screen and the display will change to represent the entered DD/SD.



REMEMBER THAT A USER LOCATION (DD-SD) IS NOT REQUIRED FOR ALL FEATURES, BUT IT ALLOWS FOR SEPARATION OF WORK AND DATA.



## Work List

### ACCESS

The Work List is the landing page displayed after the user logs into CrewPro. Additional access via the Work List menu option on the menu ribbon.

### DEFAULT VIEW

All work for the User per the District-Subdistrict that was selected.

1. Customize the view by setting the priority in each grid by clicking on the status link (planned/ordered, etc).
2. Select the status to monitor (planned, ordered, on duty, tied up, annulled, error).
3. If only one grid is needed, click on 'Expand' located in the upper right-hand side of a grid. If using only one grid and changing back to two, click on 'Collapse' located in the upper right-hand side of the grid.
4. To search for specifics within a grid, enter search criteria in the 'Search Entire Grid' field. The system will display pertinent data based on what is entered in the search field.

5. To view comments, click on the comments icon in the row, or to show all comments, click on the 'Comments' flag.

### FILTERS

Click on the Filter heading to collapse and expand the section. The filters can be used independently or dependently.

1. Input valid origin/destination stations to filter by only locations.
2. Input start/end dates to filter by a specific date range. Both start and end are not required to search.
3. Select a service type to specifically display only that service type.
4. To search for a specific train/job symbol, input the symbol and click on the status and select 'All'.
5. Click on the Search button.
6. To clear filters, click on the Reset button.

Work List
User: ADMIN  
District - Subdistrict: PM-LS

Work List
Task List
Admin Control ▾
Employee ▾
Train ▾
Messages
Assignments ▾
Logout

Create New Train

[Export to Excel](#)

**Filter**

Origin:

Destination:

Start Date:

End Date:

Service Type:

Train Symbol:

05:00

**Search**

**Reset**

**Planned** Expand

Comments

Lead Time	On Duty	Craft Crew	Status	Train ID Origin-Dest	Board	Actions
No records found						

**All** Expand

Comments

Lead Time	On Duty	Craft Crew	Status	Train ID Origin-Dest	Board	Actions
No records found						

Work List Landing Page



### ACTIONS – FROM PLANNED

1. Select a train in planned status to execute an action on and click on the Actions link in the Actions column.
2. To move the train to an ordered status, simply click on Order Crew.
3. The Order Crew confirmation allows for a change in date/time. Input a new date/time or if the displayed date/time is acceptable, click on the Save button.
4. IF the entered date/time is prior to current time plus the call lead time, a ‘short calling’ warning will be displayed. If the short calling warning is displayed, answer accordingly.
5. Upon acknowledging the warning or changing the date/time, the train will be displayed in the ordered grid. The next step would be to call a crew.



THE TRAIN REQUEST AND CREW REQUEST CAN BE ACCESSED WHEN THE TRAIN IS IN BOTH PLANNED AND ORDERED.



### ACTIONS – FROM ORDERED

1. Train Request is primarily used to make changes to the train. Changes can be made in either the Train or Crew Information sections and they will update the corresponding section.
2. To change the date/time of the train, make the appropriate update to the date/time and click on the Save button.
3. To change the status of the train from planned to ordered or back, select the proper option in the dropdown and click on the Save button.
4. To add or edit a comment for the train and/or crew, click on the comments link and ‘Add Message’.
5. Input the desired message and click on the Save button.
6. Click on the Save button on the Train Request to ensure that all changes were saved.
7. If no changes are needed, click on the Cancel button.

**ACTIONS – FROM ORDERED**

1. Crew Request is primarily used to make changes to the crew source. Changes can be made in the Crew Setting section.
2. To add or edit a comment for the train crew, click on the Crew Comments link and ‘Add Message’
3. Input the desired message and click on the Save button.
4. To change the date/time of the train, make the appropriate update to the date/time and click on the Save button.
5. To change the status of the train from planned to ordered or back, select the proper option in the

dropdown and click on the Save button.

6. To change the Craft Type to be called, click on the Craft Type dropdown options, select the option and click on the Save button.
7. Click on the Save button on the Crew Request to ensure that all changes were saved.
8. If no changes are needed, click on the Cancel button.



THE LAST OPTION IS TO CALL A CREW. PLEASE SEE THAT SECTION LATER IN THIS DOCUMENT.

**Call Crew**

**ACCESS**

CALL CREW IS ACCESSED VIA A TRAIN/JOB IN ORDERED STATUS FROM THE WORK LIST. SELECT THE TRAIN/JOB, CLICK ON THE ACTIONS LINK AND SELECT ‘CALL CREW’.

**BASIC CALL**

1. The call screen is displayed with first out and available employees displayed for each expanded position. These are the required

Ordered ▾		Expand				
Search Entire Grid						<input type="checkbox"/> Comments
Lead Time	On Duty	Craft Crew	Status	Train ID Origin-Dest	Board	Actions
05:00 CDT 05/17/18	06:00 MDT 05/17/18	Combo	Ordered	GBY01 17	YARD	Actions ▾
		Working		PM200 - PM200		
13:00 CDT 05/17/18	14:00 MDT 05/17/18	Train	Ordered	GBY02 17	YARD	Train Request
		Working		PM200 - PM200		
05:00 CDT 05/18/18	06:00 MDT 05/18/18	Combo	Ordered	GBY01 18	YARD	Crew Request
		Working		PM200 - PM200		
13:00 CDT 05/18/18	14:00 MDT 05/18/18	Train	Ordered	GBY02 18	YARD	Call Crew
		Working		PM200 - PM200		


Call Crew Access






- positions that must be satisfied for this call.
2. The displayed employee (in this scenario) will be a non-editable employee and is displayed with their name and employee ID.
  3. The on-duty date/time is editable up to a pre-set threshold (employee on duty time needs to be within a set amount of time of the train/job on duty time).
  4. Status is the employee's status at the time of this call.
  5. Rest will be populated if/when the displayed employee is not rested for the call.
  6. Duty will be populated with the employees on duty time when they are called. This can be different from the train/job call time in the heading.
  7. The employee's phone number is taken from the employee's master (personal info) screen. If there is not a phone number entered, the field will be empty and no call can be made until the phone number is entered.
  8. Attempted is the call attempt time and will not expand to the options until a time is entered and an action selected. Enter an attempted time.
  9. Click on the Action drop-down and select Attempt to Notify.
  10. The Response field is displayed to allow the user to report the response from the employee. If the employee was not reached, select the applicable option (with a comment if desired) and click on the Apply button. Any/all actions that apply to an employee are written to the employee's work history.
  11. When the employee has accepted the call, click on the Actions drop-down and select the Call option (call in CrewPro is equal to accepted call).
  12. Click on the Apply button.
  13. The position is collapsed and displayed in green. The next position displayed can now be called with the same process.
  14. If there are optional positions that need to be called, expand the section

- and call the employee displayed.  
(See next section to help an employee)
15. Click on the Complete button.
  16. When all positions have been called, click on the Complete button.
  17. The Call Slip is displayed and can be updated with comments and or engines if desired.
  18. If changes have been made, click on the Save button.
  19. Return to the Work List via the menu ribbon.

 AGAIN, MAKE SURE TO HAVE EMPLOYEE PHONE NUMBERS ENTERED ON THE EMPLOYEE PERSONAL INFO SCREEN TO EXECUTE CALLS.

 ANY TIME THAT THE CALL NEEDS TO BE STARTED FROM THE BEGINNING, CLICK ON THE ACTION DROP-DOWN, SELECT REFRESH DATA AND CLICK ON THE APPLY BUTTON.

#### ACTIONS – ATTEMPT TO NOTIFY

1. Once the Attempt to Notify action has been selected, the Attempted

field becomes required and a Response field is displayed.

2. Click on the Response drop-down options to select a valid option for the attempt.
3. Once all required attempt fields are populated, click on the Apply button to apply the data.

#### ACTIONS – LAYOFF/MARK OFF ON CALL

1. If a displayed employee needs to be marked off on call, select the action option “Layoff.”
2. Click on the Apply button. The Change of Status window is opened.
3. Input the code for the employee (S=sick), the effective date/time and additional required information (governed by the status-reason control).
4. Click on the Save button. The system moves the employee from the Employee field to the owner field and presents the next employee for the call. If no employee is presented, see next section.

### ACTIONS – HELP FUNCTIONS


1. When there is no displayed employee, the user can either add an employee or select a protecting extraboard to then add an employee.
2. To input a hand-picked employee, simply input a part of the desired employee's name, employee id, and/or user id. When the desired employee is displayed, click on the employee.
3. Click on the Actions drop-down and select Help (Pick Employee) and click on the Apply button.
4. Resume the above call process as normal.
5. To input a supply board and pick an employee, click on the Actions drop-down and select Help (Extraboard).
6. Click on the Apply button.
7. The extraboard is displayed with the Only Available, Only Rested, and Only Qualified employees to pick from (governed from the Position Attribute Control).

8. Click on any combination of availability and click the search button.
9. Select the desired employee and click on the Pick option in the Actions column.
10. Resume the above call process as normal.

### ACTIONS – REJECT EMPLOYEE

1. If the employee rejects the call, click on the proper reject option in the Actions drop-down.
2. Reject (No Answer) – the employee did not answer and is being rejected (requires comment).
3. Reject (Not Qualified) – the employee is not qualified for the position (requires comment).
4. Reject (Not Rested) – the employee is not rested for the position (requires comment).
5. Reject (Not Required) – the employee is not required to answer the call (requires comment).

6. Reject (Supervisor) – the employee is passed on supervisor instruction (requires comment).

 REMEMBER THAT ALL COMMENTS AND ACTIONS ARE WRITTEN TO THE EMPLOYEE'S WORK HISTORY AND THE TRAIN/JOB HISTORY

## **Tie Up Crew (Quick Tie Up – Crew Dispatcher)**

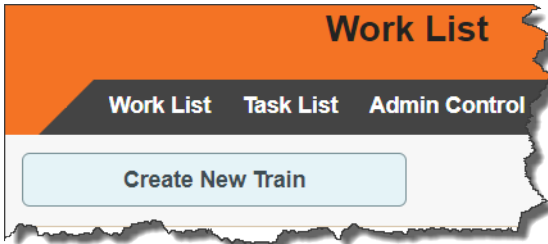
### **ACCESS**

Employee Tie Up can be accessed from many places that the employee is displayed (Tie-Up link is displayed). Work List (On Duty) is an optional access to the employee tie up screen.

### **TIE UP**

1. The tie-up links take the user straight to the tie-up screen. From the Work List, select the appropriate employee/assignment from the On Duty work.
2. In the actions column, click on Actions and select Tie Up Crew.

3. Depending on the positions included, cars handled and/or engines may have to be input on the tie-up.
4. If the user is executing tie up for the entire crew with the same times, enter Arrival, Relieved, and Released date/times in the Copy to Expanded On Duty Section.
5. After data is input, click on the “Copy to Expanded On Duty” link.
6. All of the times entered flow down to all open employees.
7. If necessary, enter comments and/or extra rest (remember, mandated rest will be assessed on tie-up).
8. Click on the Save button.
9. If there are hours of service alerts, they will be displayed. The user reads and can click the “x” in the upper right-hand corner to remove.
10. The Tie Up is displayed to the user with the successful tie-up message for each employee.
11. All data entered is written to employee and job history.



## Create Train Access

### Create Train

#### ACCESS

The Work List allows for a shortcut to create a train. Additional access via the Train menu option on the menu ribbon.

#### CREATE NEW TRAIN

1. Input the Train that will be created.
  - a. Sec – Used to identify potential sections (2<sup>nd</sup>, 3<sup>rd</sup>, etc.).
  - b. Symbol – The actual symbol (GENSW).
  - c. Day – The day that the symbol will be called (13=the 13<sup>th</sup> day of the month).
2. If the symbol entered matches a previously entered train profile, the potential origin and destination options will be pre-populated. Select the desired origin/destination from the options displayed.
3. Input the potential/actual date/time.
4. Input the status for the train.
  - a. Planned – tentative
  - b. Ordered – call crew
5. Click on the Create Train button.

6. If changes are needed, click on the Reset button to clear entries.



PRIOR TO CREATING A TRAIN, BOARDS, CREW PROFILE, AND TRAIN PROFILE MUST BE CREATED.



IF THE DESIRED ORIGIN/DESTINATION IS NOT DISPLAYED FOR THE SYMBOL THAT IS ENTERED, CREATE A NEW TRAIN PROFILE OR CREATE NEW LOCATIONS FOR THE BOARDS THAT ARE ASSOCIATED TO THAT TRAIN/CREW PROFILE.



WHEN CREATING A TRAIN TO GO INTO PLANNED STATUS, THE DATE/TIME CAN BE CHANGED PRIOR TO ORDERING A CREW (FROM THE WORK LIST). IF CREATING A TRAIN TO GO INTO ORDERED STATUS IMMEDIATELY, ENSURE THAT THE DATE/TIME ENTERED ALLOWS FOR ENOUGH TIME TO MAKE CHANGES TO THE CALL IF NEEDED.

## Task List

### ACCESS

The Task List a guide of planned "tasks" to be performed by the crew dispatcher. The Task List can be accessed via the Task List menu option on the menu ribbon.

### DEFAULT VIEW

Tasks are entered with a specific employee in mind and viewed per the District-Subdistrict that was originally selected.

### Task List Landing Page

1. The displayed tasks have a brief explanation as to the action in the Task column.
2. Click on the Actions link.



3. If the task is executable from here, click on the Submit/Notify to execute action. To view the details of the task, see the next step.
4. Click on the Details option. Depending on the task, the details will be displayed.
5. To execute the task, click on the Submit button. The task is executed with no additional actions from the user.
6. To delete the task, click on the Delete link.
7. To return to the Task List without executing a task, click on the Close button.



TO MANUALLY REFRESH THE SCREEN, CLICK ON THE ↻ ICON. TO SET AN AUTO-REFRESH TIME, CLICK ON \* AND APPLY THE DESIRED REFRESH RATE.

### FILTERS

CLICK ON THE FILTER HEADING TO COLLAPSE AND EXPAND THE SECTION. THE FILTERS CAN BE USED INDEPENDENTLY OR DEPENDENTLY.

1. Input start/end dates to filter by a specific date range. Both start and end are not required to search.
  2. Select a display type to specifically display only the applicable tasks.
  3. Click on the 'Exclude On Duty' flag to exclude any tasks that include an employee that is on duty.
  4. Click on the 'Show Auto Executed' flag to display the auto executed tasks.
  5. Click on the 'Show Errors Only' flag to show only tasks that are in error.
  6. To clear filters, click on the Reset button.
  7. To apply filters, click on the Apply button.
2. On the Create Crew Dispatcher Notification popup, input the date/time for the notification.
  3. Input the employee to receive the notification.
  4. Input the message to be delivered to the employee.
  5. To leave the notification task, click on the Close button.
  6. To submit the notification task, click on the Submit button.
  7. The notification is now on the task list to be executed.



BE AWARE OF THE STATUS COLUMN. WHEN AN EMPLOYEE IS IN PARTICULAR STATUSES, THE TASKS MAY NOT BE EXECUTED.

### CREATE NOTIFICATION

NOTIFICATIONS CAN BE CREATED FOR ANY REASON BUT ALL REQUIRE A RECIPIENT EMPLOYEE TO ACCEPT THE NOTIFICATION.

1. Click on the Create Notification button.

### ATTEMPT/EXECUTE NOTIFICATION

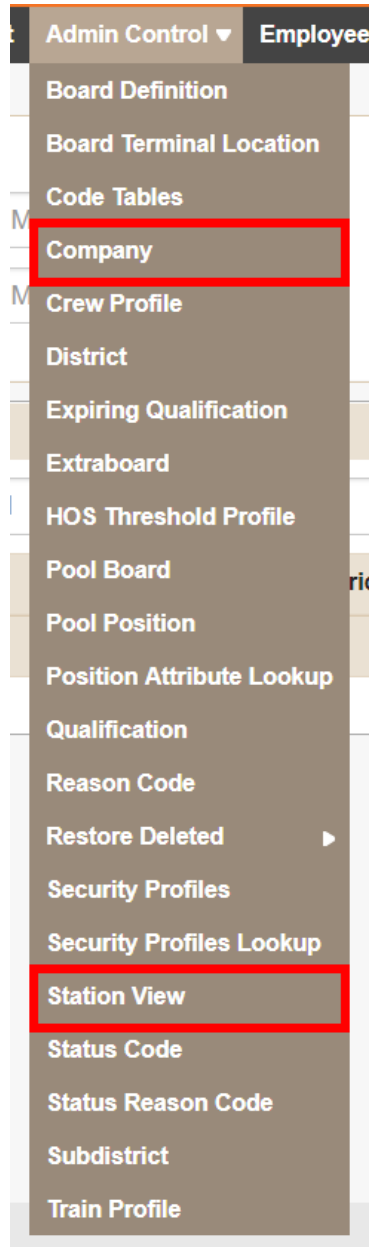
1. If employee has accepted the notification, click on the Actions link.
2. Click on the Notify action. This shows the employee notified in work



history and removes the task from the list.

3. To manually attempt to notify employee, click on the Actions link and Detail for the notification to be attempted.
4. The user calls the displayed phone number.
5. Input the attempted date/time if other than current date/time.
6. Select the response from the dropdown options.
7. Input comments relevant to the notification.
8. Select the action that is pertinent to the notification. If attempt is selected, task will remain on the task list until successful notification has been executed.





## Company

### ACCESS

Access the Company feature via the Admin menu option on the Menu Ribbon

### ADD

1. Input a part of a company name in the search field
2. Click on the Search button
3. Input the desired company code (ex. GSL)
4. Input the desired company name (ex. Generic Short Line)
5. Input a description describing the company
6. Input the address for the company (street address, city, state, zip code and country)
7. Click on the Save button



COMPANY AND STATION ARE THE FOUNDATION FOR THE FOLLOWING INFORMATION THAT IS GOING TO BE NEEDED TO ALLOW THE SYSTEM TO OPERATE PROPERLY.



## Station

### ACCESS

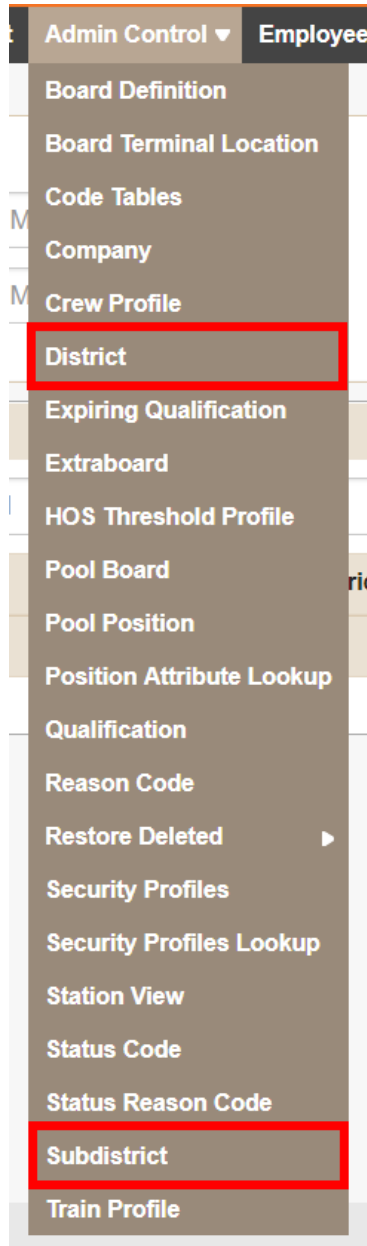
Access the Station feature via the Admin menu option on the Menu Ribbon

### ADD

1. Input a part of a station name in the search field
2. Click on the Search button
3. Input a desired station code (i.e. OMA, 2414)
4. Input a desired station name (i.e. Omaha, Fremont)
5. Input the city, state and country of the previously entered station
6. Enter the time zone that the station operates in
7. Click on the Save button



TO SEARCH FOR A COMPANY OR STATION, INPUT THE FIRST FEW LETTERS OF THE ENTRY. WHEN THE DESIRED ENTRY IS DISPLAYED, CLICK ON IT. CLICK ON THE SEARCH BUTTON AND THE APPLICABLE DATA IS DISPLAYED. EDITS CAN BE MADE TO THIS PAGE AND CLICKING THE SAVE



BUTTON WILL COMMIT THOSE CHANGES TO THE RECORD. TO DELETE THE RECORD, CLICK ON THE DELETE LINK AT THE BOTTOM OF THE PAGE AND CLICK ON THE CONFIRM POPUP.

## District

### ACCESS

Access the District feature via the Admin Control menu option on the Menu Ribbon.

### ADD

1. Input a part of a district code in the search field
2. Click on the Search button
3. Input a desired district code (i.e.OM)
4. Input a corresponding district name (i.e. Omaha)
5. Input a description of the district entered
6. Click on the Save button



TO CHANGE THE DISTRICT-SUBDISTRICT FROM A SCREEN, CLICK ON THE DISTRICT-SUBDISTRICT LINK IN THE UPPER RIGHT-HAND SIDE OF THE SCREEN. ENTER THE DD-SD THAT IS DESIRED AND CLICK ANYWHERE ON THE SCREEN.

## Subdistrict

### ACCESS

Access the Subdistrict feature via the Admin Control menu option on the Menu Ribbon.

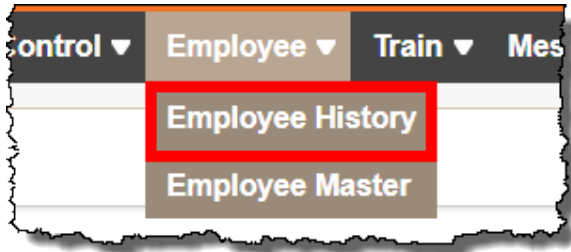
### ADD

1. Input a part of a Subdistrict Code in the search field.
2. Click on the Search button.
3. Input the desired Subdistrict Code (i.e. GS).
4. Input a corresponding Subdistrict Name (i.e. G Street).
5. Input a description that describes the Subdistrict.

6. Input the time zone that the Subdistrict operates in.
7. Identify if the Subdistrict operates with the Shift Call feature.
8. Click on the Save button.

5. Input any portion of the results to filter the display as desired.
6. To export to a pdf, click on the Export to PDF link.
7. To start a new search, click on the search section to expand.
8. Click on the Reset button.

## History – Employee and Job/Assignment



*Employee History Access*

### EMPLOYEE HISTORY ACCESS

Access Employee History via the Employee menu option on the menu ribbon.

### VIEW

1. Input a part of the name, employee id, and/or user id for the employee to be searched.
2. When the desired employee is displayed, click on the employee.
3. Input a date range to view employee records using the supplied calendar option. Select the start date and the end date.
4. Click on the Search button.

### ACTIONS

1. To enter a comment, click on the Create Comment button.
2. Input the local date and time.
3. Input the desired comment.
4. Click on the Save button.
5. The comment is saved and displayed in chronological order.
6. To view details for an event, click on Details in the Action column.
7. The details are displayed for view only. All details can be accessed by clicking the Next and Previous buttons.

- To close the window, click on the Close button.

#### JOB HISTORY ACCESS

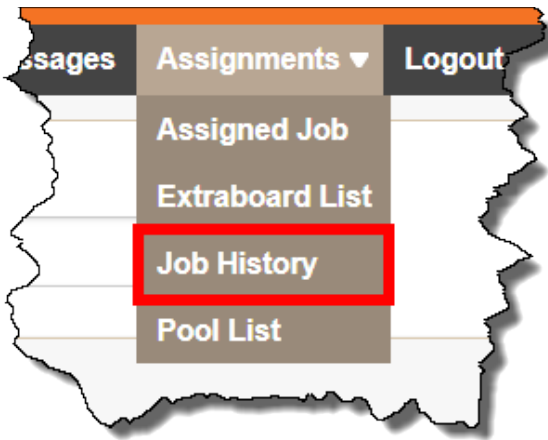
Access Job History via the Assignments menu option on the menu ribbon.

#### VIEW

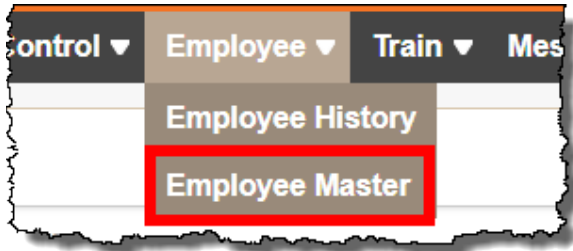
- Input a part of the Board-Station to be searched.
- Input a date range to view employee records using the supplied calendar option. Select the start date then the end date.
- Click on the Search button.
- Input any portion of the results to filter the display as desired.
- To export to a pdf, click on the Export to PDF link.
- To start a new search, click on the search section to expand.
- Click on the Reset button.

#### ACTIONS

- To enter a comment, click on the Create Comment button.
- Input the Crew ID and select a Position that the comment pertains to.
- Input the local date and time.
- Input the desired comment.
- Click on the Save button.
- The comment is saved and displayed in chronological order.
- To view details for an event, click on Details in the Action column.
- The details are displayed for view only. All details can be accessed by clicking the Next and Previous buttons.
- To close the window, click on the Close button.



*Job History Access*



## Employees

### ACCESS

Access the Employee Master via the Employee menu option on the menu ribbon.

### ADD

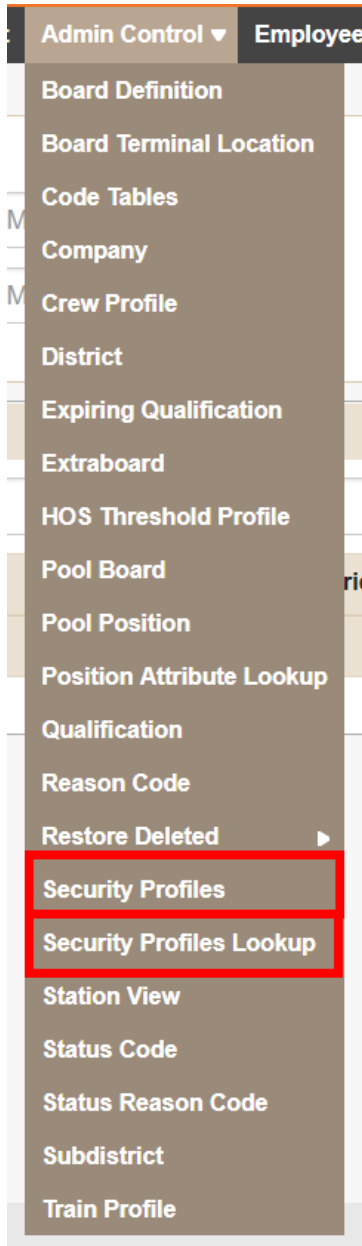
1. Click on the add link (+ Add New Employee) at the top right-hand corner of the page.
2. Input the first, middle initial, last names, and select a title from the drop-down options.
3. Input the employee’s identification number (ID).
4. Input the employee’s user identification number (ID).
5. Input the district-subdistrict that the employee will be associated with (enter a part of a valid dd-sd and select from the options displayed).
6. Input the home terminal that the employee will be associated with (enter a part of a terminal and select from the options displayed).

7. Select the primary position for the employee from the drop-down options displayed.
8. Input a date of birth for the employee (optional).
9. Input an email for the employee (optional).
10. Input the hire date of the employee (MM/DD/YYYY).
11. Click on the Submit button.

### SEARCH-EDIT-DELETE

1. Input a portion or all of the employee name, employee id, and/or user id to be searched.
2. Click on the selected employee displayed.
3. If the incorrect employee was selected, click on the Reset button and re-enter the search information.
4. Edits can be made to any editable field or any field that has an Edit link associated with it.

*Employee Master Access*



5. After all edits are made (per tab or per edit link), click on the Save button.
6. To export employee information, click on the Export to PDF link in the upper right-hand corner of the section.
7. To delete an employee, click on the Manage Employee Record link in the upper right-hand corner of the section.
8. Click on Delete Employee.



NOTE THE TABS IN THE MIDDLE OF THE SCREEN – THESE HOLD ADDITIONAL EMPLOYEE INFORMATION.

## Security Profiles - Role Security

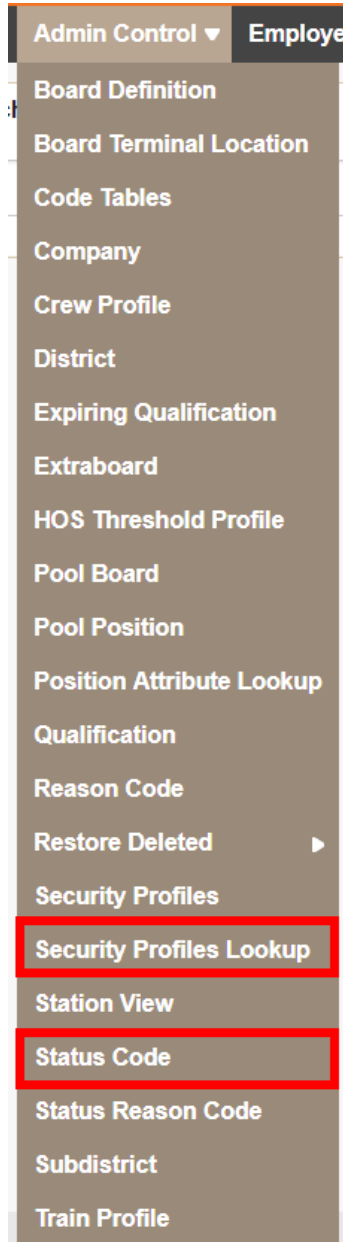
### ACCESS

Access the Security Profiles feature via the Admin menu option on the Menu Ribbon

### ADD

1. Click on the Add link (+ Add) at the bottom right-hand corner of the page.


2. Input the username for the new profile (i.e. employee name from the Employee Master).
3. Input the description for the user (i.e. Crew Dispatcher).
4. In the Rules grid, select the desired type for the user id (is = exact match, starts with = allows for sets of user ids to be created).
5. Input the value for the user id (exact user id or partial for 'starts with').
6. Click on the Data Access section.
7. Click on the add link (+ Add).
8. Add the desired features and select a value for the access.
9. Click on the Feature Access section.
10. Click on the Add link (+ Add).
11. Add the desired resources and select a value for the access.
12. Click on the Save button.



## LOOKUP / SEARCH, EDIT, DELETE

Access the Security Profiles Lookup feature via the Admin menu option on the Menu Ribbon

1. Enter a name, employee id, and/or user id (all will return valid results).
2. Click on the Search button.
3. The valid profiles applicable to the search are displayed.
4. Click on the desired profile to view/edit/delete.
5. Make the desired changes and click on the Save button.
6. To delete, click on the delete link at the bottom of the screen.
7. Confirm the delete on the confirm popup

 REMEMBER THE FEATURES ARE NAMED WITH THE SCREEN OR ACCESS THAT THEY CONVEY. DISREGARD THE LEVELS (L1, L2) AS THESE ARE MANAGED BY THE VALUES (CREATE, VIEW, ETC).

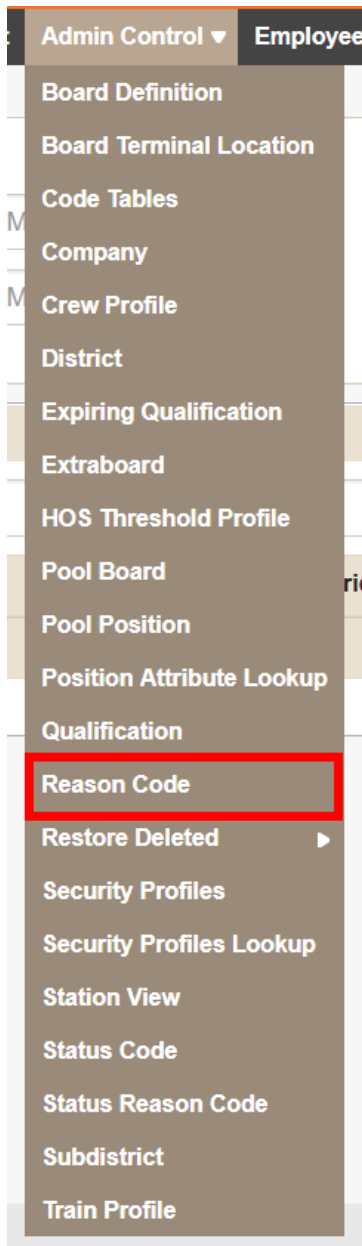
## Statuses

### ACCESS

Access the Status Code feature via the Admin menu option on the menu ribbon

### ADD

1. Enter a part of the code that is going to be added
2. Click on the Search button
3. Input the desired code (i.e. s = sick)
4. Input a short description for the code (i.e. sick)
5. Input a long description for the code
6. Select a type code from the drop down selection
  - a. Available – system only status making employees available for call
  - b. Working – on duty status
  - c. To Place – needing to be assigned to a job
  - d. Other – any other options



7. If applicable, select the 'system only' check box (if the system is going to manage the status i.e. Available).
8. Click on the Save button

### SEARCH-EDIT-DELETE

1. Input a Status Code in the search field.
2. If the desired code is displayed while entering, click on the displayed Status Code.
3. Click on the Search button.
4. Input desired changes.
5. Click on the Save button.
6. If deleting, click on the Delete link and confirm by clicking on the Confirm popup



IT IS IDEAL TO ADD STATUS CODES AND REASON CODES PRIOR TO ADDING EMPLOYEES SO THAT THE SYSTEM HAS A VALID STATUS TO PLACE THEM IN.

## Reason Codes

### ACCESS

Access the Reason Code feature via the Admin Control menu option on the menu ribbon

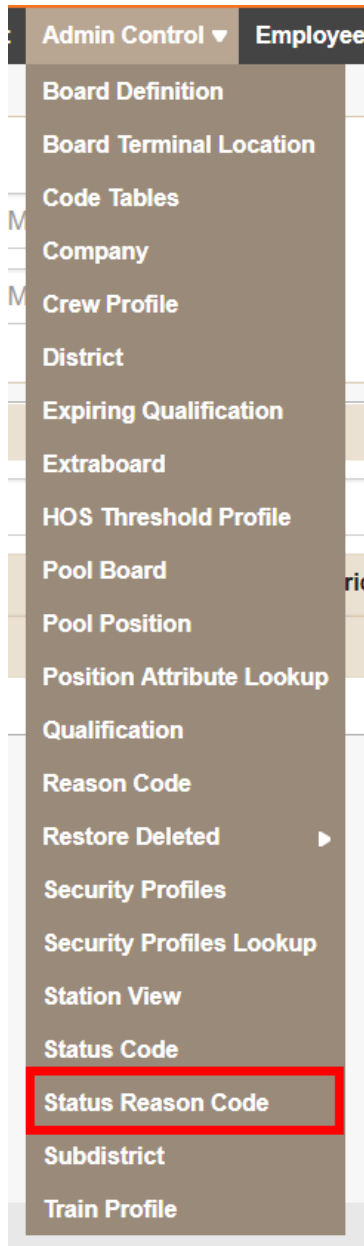
### ADD

1. Input a part of a Reason Code in the search field.
2. Click on the Search button.
3. Input the desired Reason Code (i.e. 1d).
4. Input a reason name for the code (i.e. one day).
5. Input a long description that describes the Status Code.
6. Click on the Save button.



REASON CODES ARE NO MORE THAN ADDITIONAL RULES THAT APPLY TO STATUS CODES. ONE STATUS CODE CAN HAVE SEVERAL DIFFERENT REASON CODES ASSOCIATED WITH IT.





## SEARCH-EDIT-DELETE

1. Input a Reason Code in the search field.
2. If the desired code is displayed while entering, click on the displayed Reason Code.
3. Click on the Search button.
4. Input desired changes.
5. Click on the Save button.
6. If deleting, click on the Delete link and confirm by clicking on the Confirm popup.



IT IS IDEAL TO ADD STATUS CODES AND REASON CODES PRIOR TO ADDING EMPLOYEES SO THAT THE SYSTEM HAS A VALID STATUS TO PLACE THEM IN.

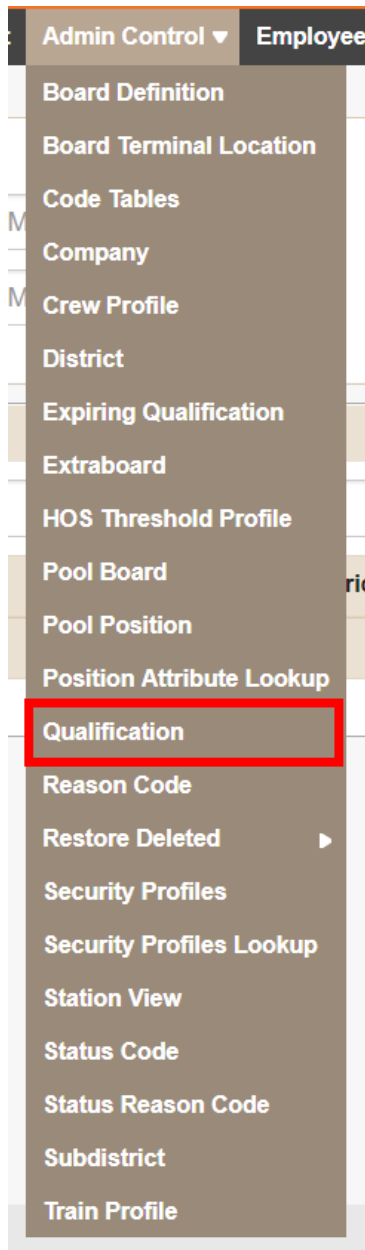
## Status Reason Codes

### ACCESS

Access the Status Reason Code feature via the Admin menu option on the menu ribbon

## ADD

1. Click on the add link (+ Add) at the bottom right-hand corner of the page.
2. Input the code or name for the Status Reason Code that will be added.
3. Input a valid reason that applies to the code (valid reason means that the Reason Code Control has already been added).
4. If there are specifics to the code entered that are applicable to only a specific craft type, position, dd-sd, board type, board, and/or crew id, it would be input in the key.
5. If there are specifics to the code being added that are applicable for the status change overall, enter in the All Status Changes section.
6. If there are specifics to the code being added that are applicable for the status change when changing TO, enter in the When Changing TO Status section.
7. If there are specifics to the code being added that are applicable for the status change when changing FROM, enter in the When Changing



FROM Status section.

8. Click on the Save button.

**SEARCH-EDIT-DELETE**

1. If the search is for a specific Status Code, enter it in the key.
2. If other characteristics are known, the 'Best Match' function can be used to get the Status Reason Control for a selection, otherwise, click on the Search button.
3. If there are duplicate Status Reason Codes, a warning icon will be displayed in the 'Set' column.
4. For a quick view of the details, click on the 'settings' icon in the 'Set' column.
5. To view all details of the Status Reason Code displayed, click on the desired code and click on the edit link in the Actions column.
6. To edit, input desired changes.
7. Click on the Save button.
8. If deleting, click on the Delete link and confirm by clicking on the Confirm popup

**QUALIFICATION**

**ACCESS**

Access Qualifications via the Admin Control menu option on the menu ribbon.

**ADD**

1. Click on the Add button at the bottom of the grid.
2. Input the qualification code (Eng).
3. Input a description that describes the code.
4. Click on the Save button.
5. To not save the entry and return to the Qualifications screen, click on the Cancel button.

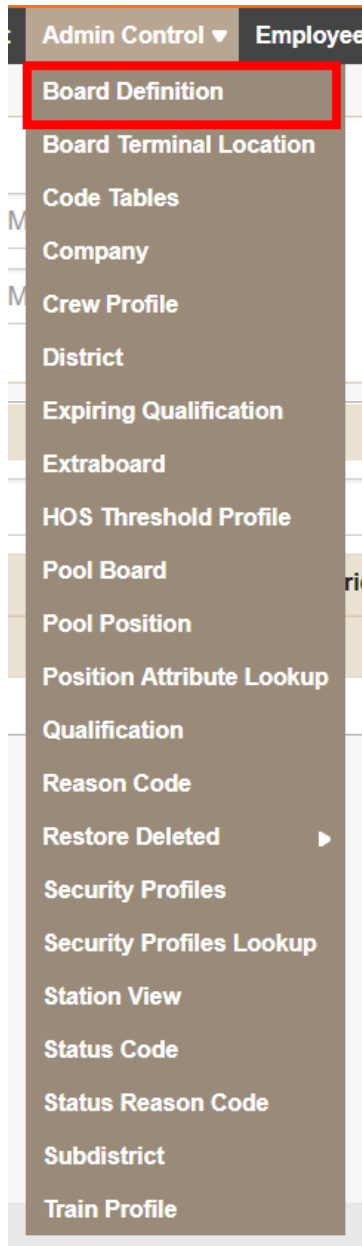


QUALIFICATIONS CAN INCLUDE CERTIFICATIONS, TERRITORIAL, OR CRAFT QUALIFICATIONS.

**WHO USES IT?**

QUALIFICATIONS ARE ATTACHED TO EMPLOYEES THAT OWN THE QUALIFICATION. ASSIGNMENTS CAN ALSO REQUIRE QUALIFIED EMPLOYEES TO WORK OR BE ASSIGNED.





## SEARCH-EDIT-DELETE

1. Input a portion or all of Qualification Code or description to filter the results.
2. To edit, click on the Edit link in the Actions column.
3. Input the changes to the description.
4. Click on the Save button.
5. After all edits are made (per tab or per edit link), click on the Save button.
6. To view edits to qualifications, click on the View Log link in the Actions column (the user that last updated the qualification will be displayed).
7. Click on the Change Log link to view details.
8. To delete a Qualification, click on the Delete link in the Actions column.
9. Click on the confirm button on the confirmation popup.

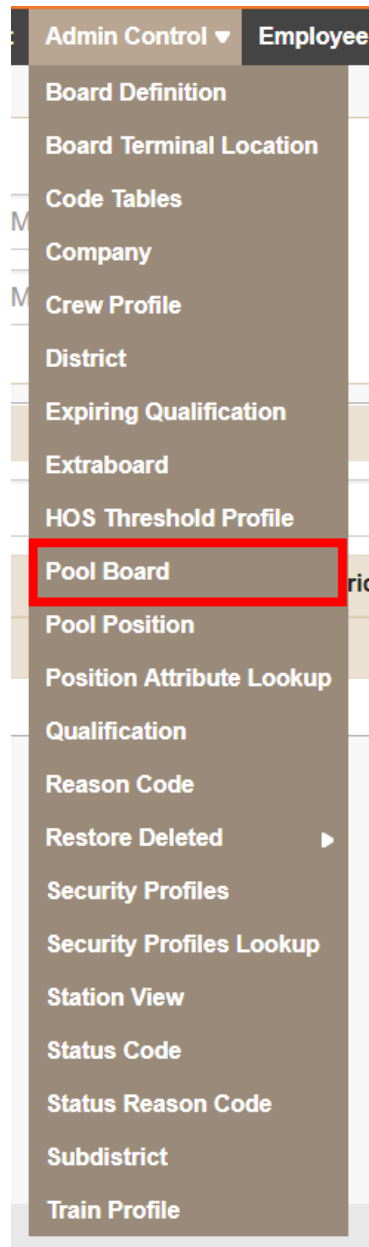
## Building Boards (All Boards)

### BOARD DEFINITION

Access via the Admin Control menu option on the menu ribbon

### ADD

1. Input a part of a Board Definition (DD-SD-Board) in the search field.
2. Click on the Search button.
3. Input the District-Subdistrict that the board will operate under.
4. Input a four-character Board (PE01).
5. Input a board name.
6. Select the Board Type from the dropdown options.
7. Input a portion of a HOS Threshold Profile and click on the desired displayed option.
8. Select a Craft Type from the dropdown options.
9. Input comments for the board.
10. Click on the Save button.



## BOARD TERMINAL LOCATION

Access via the Admin Control menu option on the menu ribbon.

### ADD

1. Input a part of a Board Terminal Location (DD-SD-Board) in the search field.
2. Click on the Search button.
3. Input the District-Subdistrict-Board (applicable boards will be displayed; click on the desired board).
4. Input a Terminal Station (Code-Name; select from displayed stations).
5. Select if the board location is a home or away.
6. Select an option from the dropdown if the location is under a different time zone than the Station.
7. Input a Terminal Description.
8. Input comments.
9. Click on the Save button.

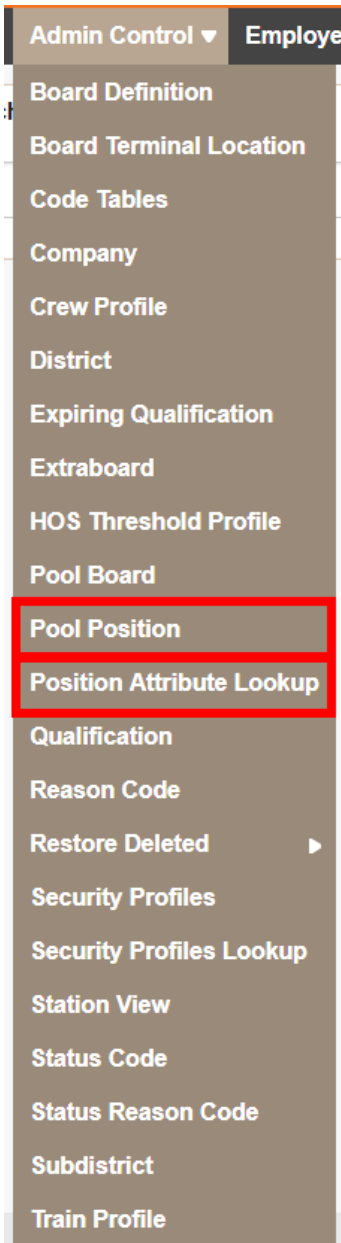
## Building Boards (Pool)

### POOL BOARD

Access via the Admin Control menu option on the menu ribbon.

### ADD

1. Input a part of a Board Definition (DD-SD-Board) in the search field (when the desired board is displayed, click on the board).
2. Click on the Search button.
3. Input a part of a Board (DD-SD-Board) in the Board field and select the desired board from the display.
4. Input the maximum number of crews (crew ids) that are going to be allowed on the board.
5. Click on the Save button.



## POOL POSITION

Access via the Admin Control menu option on the menu ribbon.

### ADD

1. Input a part of a Board Definition (DD-SD-Board) in the search field (when the desired board is displayed, click on the board).
2. Click on the Search button.
3. Click on the dropdown options under the position column and select the desired position.
4. Check flags if the position is a lead and/or a required position.
5. To add another position, click on the Add link in the Actions column and follow the same process.
6. Click on the Save button.

## POSITION ATTRIBUTE

Access via the Admin Control menu option on the menu ribbon.

### ADD

1. Click on the Add button on the lower right-hand side of the page.
2. Input a part of the District-Subdistrict and select the desired option that is displayed.
3. Select the position that will use the attribute.
4. Locate the Protecting Extraboard section on the right side and enter a part of an Extraboard that will be used as a source of supply for this pool.
5. Click on the desired Extraboard that is displayed

## POOL LIST

Access via the Admin Control menu option on the menu ribbon.

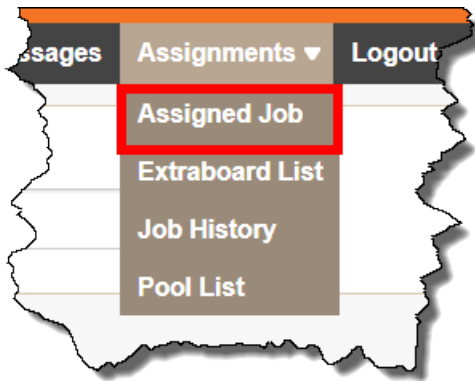
### ADD CREW ID

1. Input a part of a Pool in the search field (when the desired pool is displayed, click on the pool).
2. Click on the Search button.
3. Click on Create Crew ID button.



4. Input the Crew ID.
5. Input the Position (to add another position, click on the '+' button and repeat).
6. If desired, input qualifications that will be needed to be assigned and/or work the crew id.
7. Click on the Save button.

5. Select the shift that the job will be working during.
6. Select the Job Type (yard/local).
7. Select a position that will work the job.
8. Indicate if the position is a required (must fill) position.
9. Click on the Add Position button and repeat the last step to add multiple positions.
10. Click on the Save button.



*Assigned Jobs Access*


## Building Boards (Assigned Jobs)

### ASSIGNED/SCHEDULED JOBS

Access via the Assignments menu option on the menu ribbon.

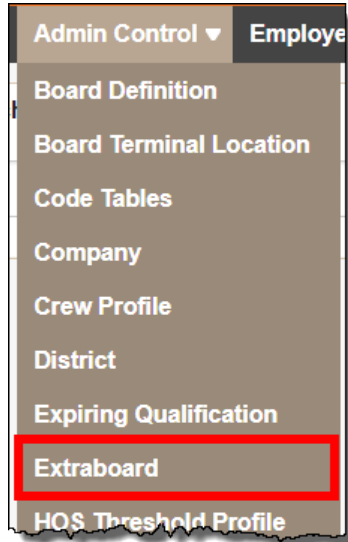
### ADD

1. Click on the Create Crew ID button.
2. Input the Crew ID (same as calling symbol).
3. Input the Job Description.
4. Select if the job will be generated into planned or ordered status (or none).

 TO ADD ANOTHER JOB WITH THE SAME POSITIONS AND SHIFT, CLICK ON THE COPY LINK OF THE JOB THAT WAS JUST ADDED.

### ADD SCHEDULES

1. Click on the radio button to the left of the desired Create Crew ID.
2. Click on the Schedules link in the Actions column.
3. If needed, enter a start date and expiration date (start date defaults to the current day) and the schedule will be displayed with the shift times that was selected, to change, update



the first row only for the start time.

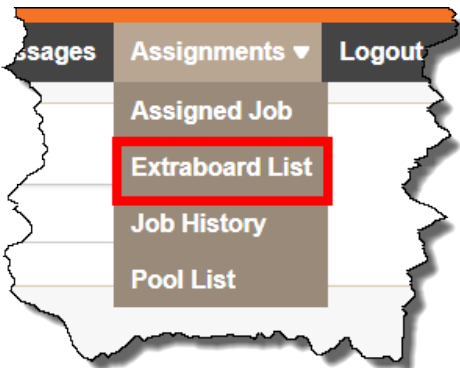
4. To input that start time to the remaining schedule, click on the ▼ and notice the input time is now cascaded down the column. Repeat the above step for the duration time.
5. If desired, update the Activity, On Duty Station, Off Duty Station, and Calling Symbol for each day of the schedule.
6. Click on the Apply button if this schedule does NOT apply to another position, otherwise, click on Apply and Next Position and repeat the above step. When the last schedule has been entered, click on the Close button.

click on the board).

2. Click on the Search button.
3. Enter a part of the Extraboard being created.
4. Click on the displayed Extrboard.
5. Input the maximum number of crews (crew ids) that are going to be allowed on the board.
6. Click on the Save button.



NOTICE THERE IS NO CANCEL BUTTON.....TO LEAVE THE SCREEN, CLICK ON THE SEARCH HEADING AND CLICK ON THE CANCEL BUTTON.



*Extraboard List Access*

## Building Boards (Extraboards)

### EXTRABOARD

Access via the Admin Control menu option on the menu ribbon.

### ADD

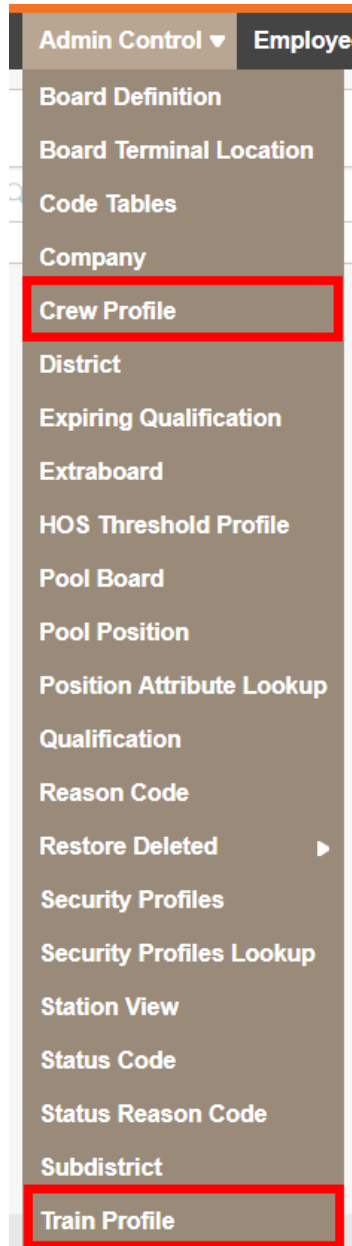
1. Input a part of a Board Definition (DD-SD-Board) in the search field (when the desired board is displayed,

### EXTRABOARD LIST

Access via the Assignments menu option on the menu ribbon.

### ADD

1. Input a part of a Board Definition (DD-SD-Board) in the search field (when the desired board is displayed, click on the board).
2. Click on the Search button.



3. Click on the Create Crew ID button.
4. Input the justification (reason) for creating the Crew ID.
5. Click on the Save button.
6. Input the Crew ID code (up to four characters).
7. Select a position from the dropdown menu.
8. Click on the Save button.



THE CREW IDS ARE NOT DISPLAYED ON THE “HOME” TAB BECAUSE THERE IS NOT AN EMPLOYEE ASSIGNED. CLICK ON THE “ALL” TAB TO VIEW THE CREW IDS CREATED.

## Crew Profiles

Access via the Admin Control menu option on the menu ribbon.

### ADD

1. Input a part of the desired profile name in the search field.
2. Click on the Search button.

3. Input the desired profile name.
4. Input a description.
5. Input an intermediate station **only if** there would be an intermediate tie up station.
6. Input the Arrival Station.
7. Input the Final Tie Up Station.
8. Input the Crew Source for the craft that is displayed. Enter a part of the desired board terminal.
9. Click on the displayed board terminal.
10. Click on the Save button

## Train Profiles

Access via the Admin Control menu option on the menu ribbon.

### ADD

1. Input a part of a Station in the Origin Station field (when the desired station is displayed, click on the station).



2. Follow the same instructions for the Destination Station.
3. Input the desired Symbol (job/train symbol).
4. Select the Type of Service from the dropdown.
5. Select a valid Tour Type from the dropdown.
6. Input a description for the Train Profile.
7. Input the Crew Profile that will be the supply for this job/train.
8. Select a position from the dropdown menu.
9. Click on the Save button.

## Change Logs

### ACCESS

Click on the “Last Update” in the lower right-hand corner of multiple pages. If Last Update is not displayed, there are no change logs available.

### VIEW

1. Click on the “Last Update” link in the lower right-hand corner of the page.
2. Note that the user that last updated the feature is displayed. To view the change log, click on the Change Log link.
3. The left-hand side of the screen allows the user to compare changes. The right-hand side displays the fields that were changed (a-b).



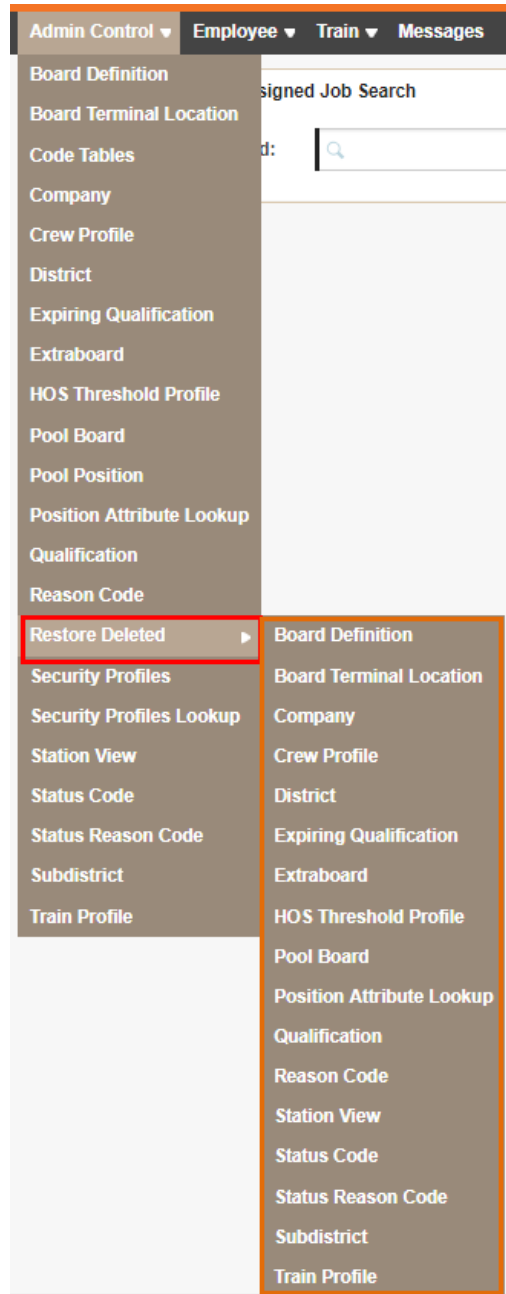
THE CHANGE LOGS CAN BE ACCESSED BY THE RESTORE DELETE FEATURES AS WELL.

### ACCESS

Click on the Filters heading to expand the section.

### FILTER

1. Select the Range Limit by clicking the dropdown options OR
2. Input a date-time range to filter results.
3. To view changes only, check the View Changes Only flag.



THE CHANGE LOGS ARE USED TO RESEARCH WHO MADE A PRIOR UPDATE, WHAT THE CHANGE WAS, AND IF ENTERED, JUSTIFICATION AS TO WHY IT WAS DONE.

## Restore Deleted

### ACCESS

Access via the Admin Control menu option on the menu ribbon.

### SUB-MENU

Select the feature that may need to be restored.

1. Locate the restore point that will be restored.
2. Click on the Restore link in the Action column.
3. Confirm the restore request.
4. Restore is completed and the feature is returned to the selected state.



THE CHANGE LOGS CAN BE VIEWED HERE AS WELL PER THE DELETED DATE/TIME.

### FILTER

SELECT A RECORD (IF DIFFERENT FROM THE RECORD SELECTED ON ENTRY) FROM THE RECORD TYPE DROPDOWN OPTIONS. SELECT THE FEATURE THAT MAY NEED TO BE RESTORED.

1. Select a record (if different from the record selected on entry) from the Record Type dropdown options.
2. Select the Range Limit by clicking the dropdown options OR
3. Input a date-time range to filter results.
4. See the previous set of steps to restore.

## Extras – General Information

1. F5 can be used to refresh a page within the system.
2. Screens can be opened in new tabs within the browser for toggling between screens.
3. Any label that has a ▼ next to it indicates that there is an action or more information available. Clicking on the symbol will display that information or execute an additional action.
4. Any open ○ or □ indicates that the user can select that item.
5. Labels with a dotted line underneath it has more information associated with it. Hover the mouse pointer over these items and the system will display the information.
6. Colors are used as indicators to the user. Generally, red is used to make the user notice an item (rest).
7. Any labels that are displayed in blue are often a link to something else. Clicking on these links will execute another action.
8. Reset buttons reset the data that was input so that new input data can be entered.
9. The system will retain a user's login information even when exiting the system. To clear this information, clear the browser history and cache prior to logging into the system again.
10. Profiles act as rules in the system. The user controls the rules with the profile that is used.

### CREATE OUTLINE FROM EXISTING DOCUMENT

1. If you use heading styles to create longer documents, you can see a document's organization, move around, and rearrange chunks of text.
2. To learn more about Outline view, see Microsoft Word Help.