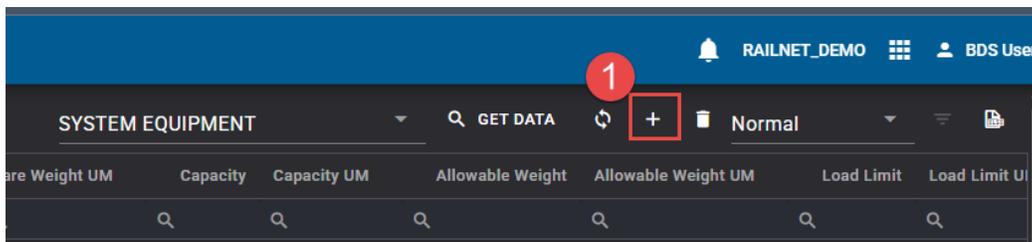# Equipment Manager: Managing Equipment

Adding New Equipment

The following steps must be completed to add and activate new equipment.

- [Add Equipment](#)
- [Initial Asset Assignment](#)
- [Assigning Initial Fleet and Business Groups](#)

Add Equipment

1. In the Equipment module, select the add (+) icon found on the top right portion of the screen, just below the blue bar.

2. In the details section, enter in the information for your equipment.
   The following fields are required and are marked with an asterisk (*)
   a. Init (Equipment Initial)
   b. Num (Equipment Number)
   c. Equipment Type: Use the drop-down menu to choose from the available options.
3. Add [Equipment Categories](#) and [Equipment Component Categories](#).
   a. The system will automatically add default categories. However, you can assign more specific categories at this time.
4. Select Save Equipment
   a. This option will only be available once all Required Fields are entered.
5. After the Equipment has been added, you may enter additional information such as: Fleet, Business Group, Asset/Lease information, and Mechanical Information. Please see specific sections below for further guidance.

Initial Asset Assignment

Asset Assignment (formerly Car User ID) is used to identify ownership type of the equipment. (Owned, leased, subleased etc.). *If there is no active Asset Assignment, cars will be identified as Inactive.*

1. Select the Railcar from the grid.
2. In the EQUIPMENT DETAILS section, select the ASSET ASSIGNMENT pill button or scroll down to navigate to the ASSET ASSIGNMENT section.
3. In the ASSET ASSIGNMENT section, select add (+) icon. This will open a pop-up window to allow for data entry. Required fields are notated with an asterisk (*)

      a. Status Begin Date (required): The date equipment becomes effective as part of the client's-controlled car list using the selected Asset Status.

      b. Status End Date (optional): The date equipment becomes ineffective as part of the client's-controlled car list using the selected Asset Status.

      c. Status Actual Arrival Date (optional): The date the utilizing party takes physical possession of the equipment against a selected Asset Status.

      d. Asset Status- Choose from drop down.
           i. Additional data fields will appear for cars that are Leased/Subleased.
           ii. Enter required Lease /Sublease information

      e. Select Save and Close

4. Lease/Sublease Information: *All Lease Rider (*managed in Equipment Manager*) and Lease Party Fact (*managed in Reference Manager*) information must be created prior to Asset Assignment.

      a. Lease/Sublease Party No: The leasing party's representative code,

      b. Lease/Sublease Rider No: The rider's representative code.

      c. Assigned to Rider Date: The date the equipment is assigned to the Rider. This date must be within the start and end dates of the Rider. On initial assignment, this field is read only and is populated based on the Asset Status Begin Date.

      d. Removed from Rider Date: Last date that piece of equipment moved under the selected rider. Note* this field will be left blank until car is removed from Rider.

      e. Lease Type: The type of lease set for the Lease Rider. This field is read only and is set from the Lease Rider menu.

f. Actual Arrival Date: The physical arrival date of the equipment. _NOTE: Lease History will not be created without the population of this date._

g. Actual Return Date: The physical return date of the equipment. Note* this field will be left blank until car is returned to owner.

h. Term Renewal Date: The rider renewal date. This field is read only and is set from the Lease Rider menu.

i. Lease Arrival and Lease Return Information: These sections can be used to select predefined delivery and return parties if desired.

Assigning Initial Fleet and Business Groups

1. Select the Railcar from the grid.
2. In the EQUIPMENT DETAILS section, select the FLEET ASSIGNMENT pill button or scroll down to navigate to the FLEET ASSIGNMENT section.
3. In the FLEET ASSIGNMENT section, select add (+) icon. This will create a new row in the grid for data entry.
   **Note: If a trip is received with a car that does not exist in the system, the car will be automatically added and assigned Fleet ID/Business Group of UNKN/UNKN


4. Enter the Fleet and Business Group information.
   a. Expiry Date is an optional field.
   b. Effect Date, Fleet ID, and Business Group are required.
5. Select the Save icon located on the right end of the grid.

Managing Asset Assignment (Lease/Sublease)

After the initial set up of your Asset Assignment, the following sections provide instructions for managing updates and edits.
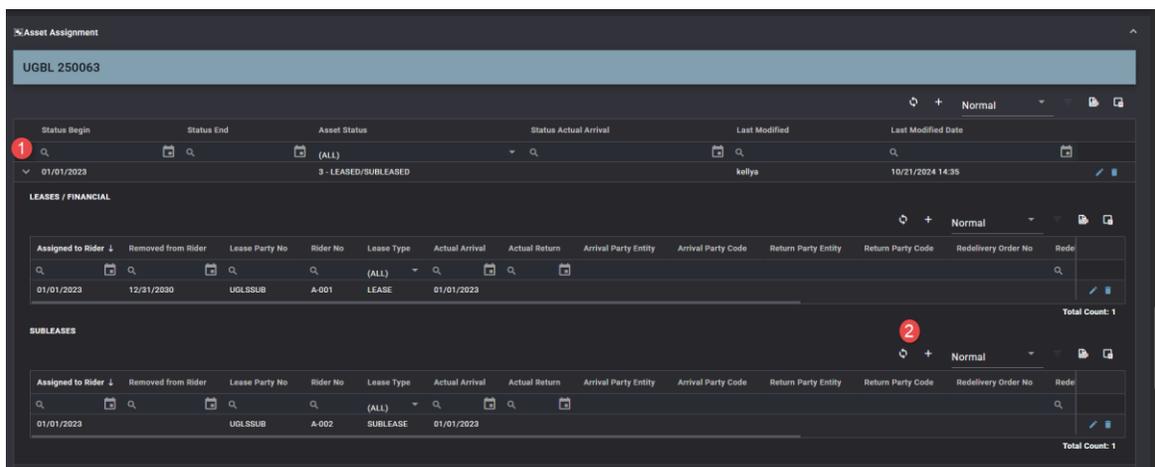
Adding New Asset Assignments

1. Select the Railcar from the grid.
2. In the EQUIPMENT DETAILS section, select the ASSET ASSIGNMENT pill button or scroll down to navigate to the ASSET ASSIGNMENT section.
   a. Select add (+) icon at the top of the Asset Assignment Section. This will open a pop-up window to allow for data entry. Required fields are notated with an asterisk (*)
   b. Enter the data as defined in the Asset Assign section of Add Equipment.
   c. A pop-up notification will appear informing you that the previous assignment Expire Date will automatically be set to the day before the new assignments Effective Date.
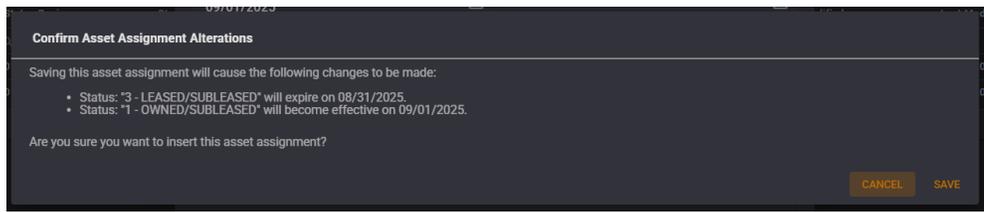
Adding New Lease/Sublease

1. Select the Railcar from the grid.
2. In the EQUIPMENT DETAILS section, select the ASSET ASSIGNMENT pill button or scroll down to navigate to the ASSET ASSIGNMENT section
   a. **New Lease/Sublease Assignment:** Lease/Sublease Information: *All Lease Rider (managed in Equipment Manager) and Lease Party Fact (managed in Reference Manager) information must be created prior to Asset Assignment.
      i. Expand the Asset Assignment section, expand the appropriate Asset Assignment, and Select add (+) icon on the Lease/Sublease Grid.

      ii. This will open a pop-up window to allow for data entry. Required fields are notated with an asterisk (*)
      iii. Enter the data as defined in the Lease/Sublease section of Add Equipment.

b. Select Save and Close
c. A pop-up notification will appear informing you that the previous Lease/Sublease information Expire Date will automatically be set to the day before the new Lease/Sublease Assigned to Rider Date.

Editing Existing Asset Assignments or Lease/Sublease

If you would like to change information on an existing or historical Asset Assignment or Lease/Sublease you can perform an edit.

1. Select the Railcar from the grid.
2. In the EQUIPMENT DETAILS section, select the ASSET ASSIGNMENT pill button or scroll down to navigate to the ASSET ASSIGNMENT section.
3. In the ASSET ASSIGNMENT section,
    a. Asset Assignment: Select the assignment that you would like to edit and select the edit (pencil) icon. This will highlight the row and make the fields editable.
    b. Lease/Sublease: Expand the appropriate Asset Assignment and select the edit (pencil) icon next to the lease/sublease you wish to edit.
        i. A pop-up window will open for you to edit the details of the lease/sublease.
4. Select Save on that row to save the changes.

Deactivating an Asset

If you would like to deactivate an asset, you will need to ensure there are no active Asset Assignments.

1. Select the Railcar from the grid.
2. In the EQUIPMENT DETAILS section, select the ASSET ASSIGNMENT pill button or scroll down to navigate to the ASSET ASSIGNMENT section.
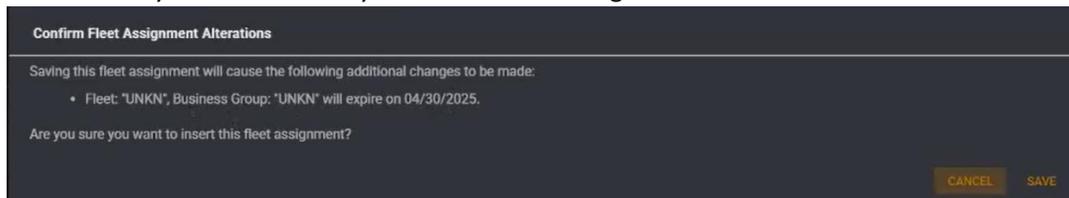3. In the ASSET ASSIGNMENT section,

a. Asset Assignment: Select the assignment that you would like to edit and select the edit (pencil) icon. This will highlight the row and make the fields editable. Enter a Status end date. At midnight on that date, the railcar will become inactive.
b. Lease/Sublease: If the car is assigned to a lease/sublease, you will also need to enter in the removed from rider date. Expand the appropriate Asset Assignment and select the edit (pencil) icon next to the lease/sublease you wish to edit.
   i. A pop-up window will open for you to edit the details of the lease/sublease.
   ii. Enter in the Removed from Rider date.
   iii. Select Save on that row to save the changes.
   iv. A pop-up window will open for you to edit the details of the lease/sublease.
c. Select Save on that row to save the changes

Managing Fleet and Business Groups

After the initial set up of your Fleet and Business groups, the following sections provide instructions for managing updates and edits.

Adding New Fleet and Business Groups

1. Select the Railcar from the grid.
2. In the EQUIPMENT DETAILS section, select the FLEET ASSIGNMENT pill button or scroll down to navigate to the FLEET ASSIGNMENT section.
3. In the FLEET ASSIGNMENT section, select add (+) icon. This will create a new row in the grid for data entry.
4. Enter the New Fleet and Business Group information.
   a. Expiry Date is an optional field.
   b. Effect Date, Fleet ID, and Business Group are required
5. Select the Save icon located on the right end of the grid.
6. A pop-up notification will appear informing you that the previous assignment Expire Date will automatically be set to the day before the new assignments Effective Date.

Editing Fleet and Business Group

If you would like to change information on an existing or historical Fleet or Business Group assignment you can perform an edit.

1. Select the Railcar from the grid.
2. In the EQUIPMENT DETAILS section, select the FLEET ASSIGNMENT pill button or scroll down to navigate to the FLEET ASSIGNMENT section.
3. In the FLEET ASSIGNMENT section, select the row that you would like to edit and select the edit (pencil) icon. This will highlight the row and make the fields editable.
4. Select Save on that row to save the changes.

Equipment Categories/Display Grouping

Dates and information on the Equipment

Equipment Categories allow you to customize the displayed Mechanical fields (dates and associated information) for your equipment. These differ from Equipment Components (dates and information for service and safety equipment) which are discussed in the next section. Further guidance on managing Equipment and Component Categories can be found in the Managing Categories section of this guide.

1. To assign a Display (Equipment) Category, choose from the drop down in the Display Grouping Field.
   a. The defined Mechanical Fields for that Category will display in the Mechanical Profile section and on the right side of the screen.

Equipment Component Categories

Dates and information associated with Components such as Service and Safety equipment.

Equipment Component Categories allow you to customize the displayed Equipment Component fields (dates and information associated with Components such as Service and Safety equipment) for your equipment. The system comes with six pre-defined categories. You may use these categories as defined, edit them to meet your needs, or create custom categories. Further guidance on managing Equipment and Component Categories can be found in the Managing Categories section of this document.

1. To assign An Equipment Component Category, choose from the drop down in the Equipment Component Categories field.

a. Equipment Component Category: defines the components available to be added to that equipment.

Managing Categories

1. **Managing Equipment Category/ Display Grouping**

The system comes with six pre-defined Equipment categories. You may use these categories as defined, edit them to meet your needs, or create custom equipment categories.

a. Pre- Defined Categories:
    i. RALL – RAIL-ALL
    ii. RALLHC – RAIL-ALL HOPPERS
    iii. RALLTC – RAIL-ALL TANKS
    iv. RGPTC – RAIL-GP TANKS
    v. RPDHC – RAIL-PD HOPPERS
    vi. RPTC – RAIL-PRESSURE TANKS
b. Viewing Categories
    i. Navigate to Reference Objects>Reference>Categories
    ii. Select an Equipment Category from the grid.
    iii. Category Mechanical Fields displays all mechanical fields associated with the selected Equipment Category.
    iv. You may export this information to Excel by selecting the XLS icon.
c. Adding Category Mechanical Fields to an Equipment Category
    i. Navigate to Category Mechanical Fields by scrolling or selecting the pill button.
    ii. Select the add icon (+) on the top right of the grid.
        1. A new row will appear in the grid.
    iii. Choose a Mech Field from the drop-down menu.
        1. Additional Mech Fields can be added by navigating to Reference Objects>Reference>Mechanical Fields
    iv. Select Save on the new row.

d. Editing Category Mechanical Fields to an Equipment Category
   i. Navigate to Category Mechanical Fields by scrolling or selecting the pill button.
   ii. Select the pencil icon row of the item you wish to edit.
   iii. Make Changes.
   iv. Select Save on row.

2. Managing Equipment Component Categories

The system comes with six pre-defined Equipment categories. You may use these categories as defined, edit them to meet your needs, or create custom equipment categories.

a. Pre- Defined Component Categories:
   i. RALLHF – RAIL ALL HOPPER FITTINGS
   ii. RALLRF – RAIL ALL FITTINGS
   iii. RALLTF – RAIL ALL TANK FITTINGS
   iv. RGPTF – RAIL GP TANK FITTINGS
   v. RPTF – RAIL PRESSURE TANK FITTINGS
   vi. RRUNGR – RAIL RUNNING GEAR

b. Viewing Component Categories
   i. Navigate to Reference Objects>Component>Categories
   ii. Select a Component Category from the grid.
   iii. The Component Category Component section displays all components associated with the selected category.
   iv. You may export this information to Excel by selecting the XLS icon.

c. Adding New Component Categories
   i. Select the add (+) icon on the top right of the main grid.
   ii. Enter:
      1. Component Category Name
      2. Category Description
      3. Transit Mode
   iii. Select Save Component Category
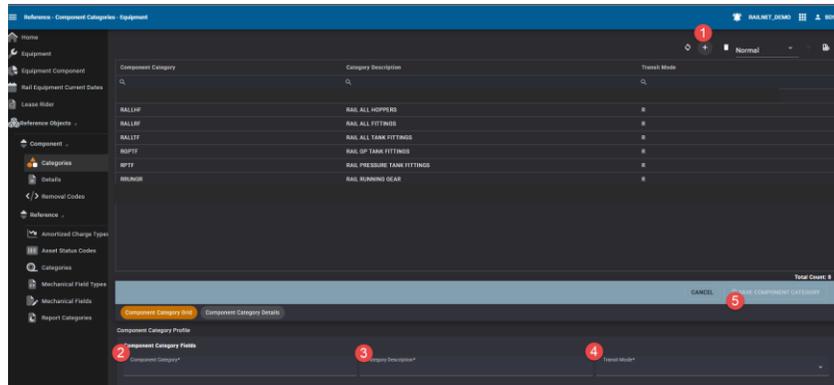
d. Adding Components to a Component Category
    i. Navigate to Component Category Component by scrolling or selecting the pill button.
    ii. Select the add icon (+) on the top right of the Component Category Component grid.
        1. A new row will appear in the grid.
    iii. Choose a Component ID from the drop-down menu.
        1. Additional Component IDs can be added by navigating to Reference Objects>Component>Details
    iv. Select Save on the new row.