Umler® Managing Access Rights

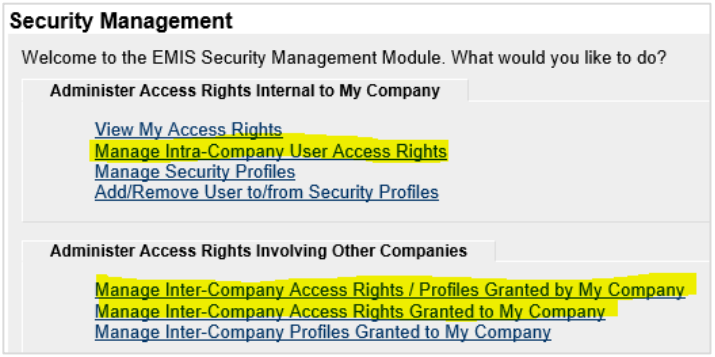
This Quick Guide helps Company Administrators manage access rights for their Umler users.

The Company Administrator controls each user's access to modify data within the Umler system. By default, new users have the ability to perform basic queries of their own company's data without needing access to another company's confidential data or incurring charges per record (i.e., the "Umler Access for Query" role). Security Management rights also control another mark's or company's access to a company's data, including confidential data if desired. This Quick Guide does not address managing access rights using profiles. See the Umler User Guide for details.

Use this procedure to grant any or all data-modification rights to an Umler user or to another mark or company:

1. Sign in as the Company Administrator, navigate to **Umler**, and select the company whose rights you want to manage.
2. From the Umler menu bar, select **Account Administration > Security Management**.

3. Select the hyperlink appropriate to the rights that you want to grant.



   - **Manage Intra-Company User Access Rights** – Select to grant rights to a user within a company or related marks. Continue to step 4 Intra-Company Access Rights.
   - **Manage Inter-Company Access Rights / Profiles Granted by My Company** – Select to grant and accept rights to another company to access the data for the company that you manage. Skip to step 10 Inter-Company Access Rights Granted by My Company.
   - **Manage Inter-Company Access Rights Granted to My Company** – Select to assign a user in the company that you manage access another company's data, *or* revoke access rights granted by another company to the company that you manage. Skip to step 12 Inter-Company Access Rights Granted to My Company.

Manage Intra-Company Access Rights

4. Select the user to whom you want to grant Umler access rights for the company that you are managing, and then click **Select**.

5. Select the button that corresponds to the access right that you want to grant to the user.
   - **Add Pool Right** – Select this button to grant rights to add, update, and/or delete a Pool Header or assign/unassign equipment to a pool.
   - **Add Equipment Right** – Select this button to grant rights to add, modify, or delete equipment, or add/remove individual equipment to or from a pool, or remove leased equipment from your registry.

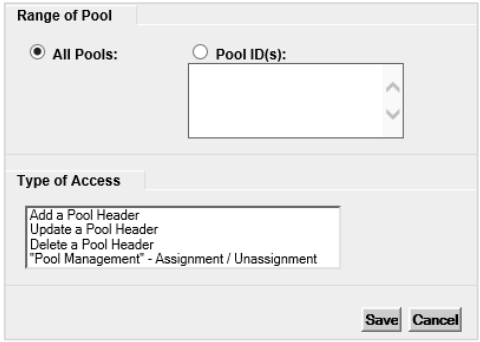
   - **Add Inspection Right** – Select this button to grant rights to report equipment inspections.
   - **Edit** – Select an existing access right, then select the **Edit** button to modify it.
   - **Delete** – Select an existing access right, then select the **Delete** button to delete the access right.
   - **Clone Rights from another User** – Select this button to copy all of a user's access rights to another user whose access rights you are currently creating or modifying. Cloned rights are added to any existing rights for the user and you have the ability to choose to edit any cloned rights to customize them for the current user.

6. When granting access rights or editing existing access rights, always provide:

   - **Description**, **Effective Date** that is no earlier than today's date, **Expiration Date** that is no earlier than today's date (`12-31-9999` by default) and **Type of Access** (see steps 7 and 8 below).

7. When granting **Pool Rights**, choose from these values:

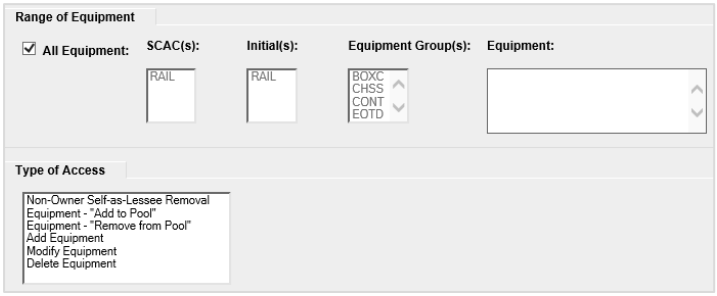
   - **All Pools** – The user has the Type of Access chosen below over all pools in the company.
   - **Pool ID(s)** – The user has the Type of Access below to only those pools listed in this text box. When entering more than one ID, enter specific values separated by commas, or enter a range of values separated by a hyphen or enter a combination of both comma-separated values and ranges.
   - **Type of Access** – The user may modify the pool chosen above according to the selections in this list box. Use the Ctrl key to select more than one value.



   When you have assigned pools and associated rights to the user, click **Save**.

8. When granting **Equipment Rights**, choose from these values:

   - **All Equipment** – The user has the Type of Access chosen below over all equipment controlled by the company. Uncheck this to enter the next fields.
   - **SCAC(s)** – The user has the Type of Access chosen below over one or more SCACs specified in this list box.
   - **Initial(s)** – The user has the Type of Access chosen below over one or more equipment initials specified in this list box.

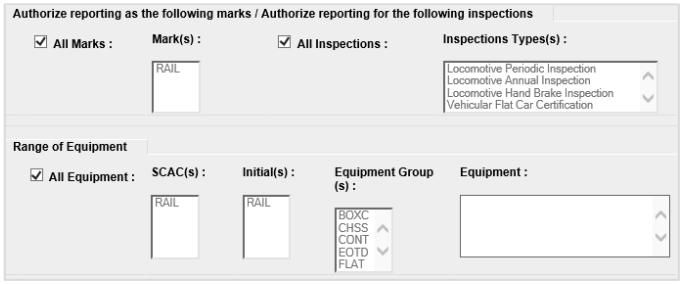


   - **Equipment Group(s)** – The user has the Type of Access chosen below over selections in this list box (e.g., box cars, tank cars, locomotives, etc.).
   - **Equipment** – The user has the Type of Access chosen below to only the specific equipment listed in this text box. When entering more than one ID, enter specific values separated by commas, or enter a range of values separated by a hyphen or enter a combination of both comma-separated values and ranges (e.g., `RAIL401, RAIL404, RAIL500-RAIL599`).
   - **Type of Access** – The user may modify the equipment chosen above according to the selections in this list box. Use the Ctrl key to select more than one value.

   When you have assigned equipment and associated rights to the user, click **Save**.

9. When granting **Inspection Rights**, choose from these values:

   - **All Marks** – The user may report inspections for all marks in the company. Uncheck this to enter the next field.
   - **Mark(s)** – The user may report inspections for the selections in this list box.
   - **All Inspections** – The user may report inspections for inspection types that the company performs. Uncheck this to enter the next field.

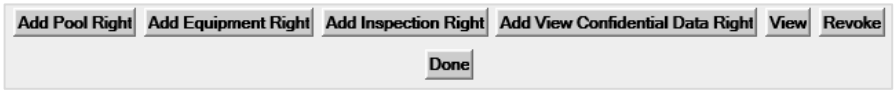


- **Inspection Type(s)** – The user may report inspections for the selections in this list box. Use the Ctrl key to select more than one value.
- Range of Equipment works the same as Equipment Rights (see step 8), but the choices here apply to *inspections* of that equipment, not to equipment-management rights.

When you have assigned inspection rights to the user, click **Save**.

Manage Inter-Company Access Rights Granted by My Company

10. Select the company for whom you want to grant access rights. Then select **Grant Access Rights**.
11. Select the button that corresponds to the access right that you want to grant to the other company. Refer to step 5 for details about **Pool**, **Equipment** and **Inspection Rights**.



- **Add Pool Right**
- **Add View Confidential Data Access Right** – Select this button to grant rights to the other company to view the confidential data of the company that you are managing.
- **View** – Select an existing access right row above this button and then select this button to view the details of this access.
- **Revoke** – Select an existing access right row and then select this button to revoke that access right in its entirety. Click **Revoke** again to confirm or click **Cancel** to leave the page without making the change.

Manage Inter-Company Access Rights Granted to My Company

12. Select an access right granted to your company, and then select **View**.

13. Perform one of these steps, as appropriate:
    - If access is in a Pending status click **Accept** or **Decline**.
    - If access rights have been accepted, select **Assign to User** to grant those rights to someone in your company.
    - If you no longer need access rights to that company, click **Relinquish**. Click **Relinquish** again to confirm or click **Cancel** to leave the page without making the change.

Additional Resources

The following additional resources are available:

- Consult the *Umler Data Specification Manual* for information data field definitions and business rules.
- Consult the *Single Sign On (SSO) Administrator Guide* for information on how company administrators manage user's permissions in SSO.
- Access the Umler Reference Material page to access other essential resources for using the Umler system.

Contact the Railinc Customer Success Center at 1-877-RAILINC (1-877-724-5462) or csc@railinc.com if you need assistance.