Street Interchange Application (Web Portal) – User Manual for Equipment Providers

Login / Authentication - directly from URL www.streetinterchange.com or via link within UIIA account

EPs once logged into their UIIA account will see a link under Other Options click on Access Street Interchange (SIA) – this will take you directly into the new program –
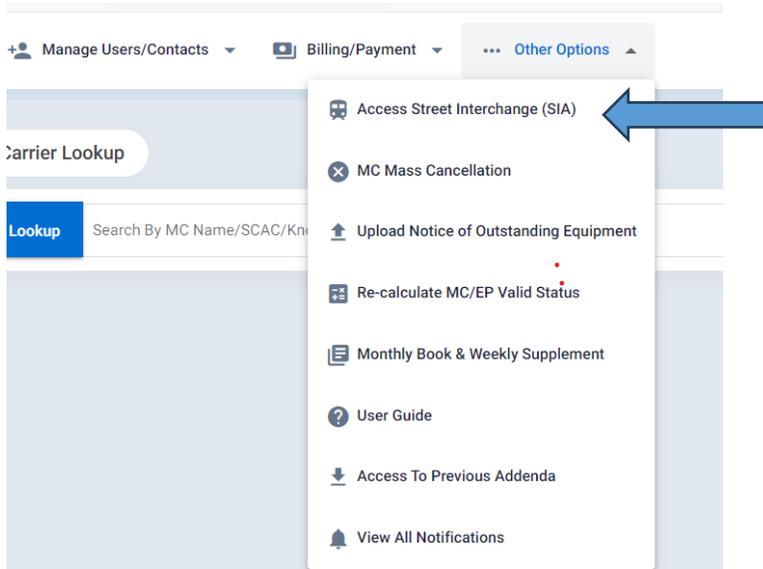
Equipment Provider users – can also login to SI portal at www.streetinterchange.com using their SCAC and UIIA application password

Link on login page will display Container Availability within the Street Interchange Application by size and type
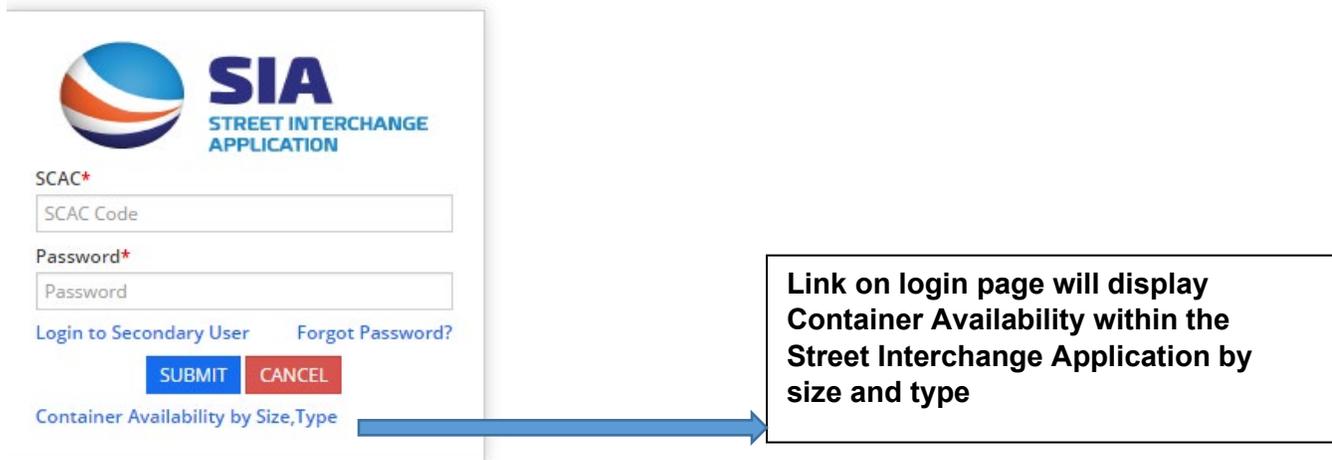
EP Secondary users – can login to SI portal using EP SCAC and their UIIA username and password as assigned by the EP. Alternatively secondary users can access the Street Interchange application once logged into the UIIA by clicking on the IANA Street Interchange Application link on the navigation bar.

www.streetinterchange.com   **From UIIA Application once secondary user is logged in:**

Adding Secondary Users - To add a secondary user, the main UIIA contact will need to add the individual under the secondary user feature in the UIIA program. Once added, then go to the Street Interchange Application and set the user's permissions as to whether you want the user to be able to **Initiate Street Interchanges** or **Initiate and Approve Street Interchanges** on your company's behalf.
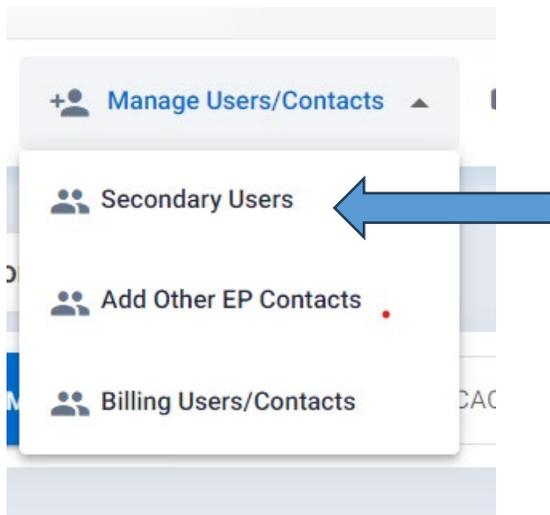
Click on ADD USER and then add new secondary user name, password, email and whether the user should have read only rights within the UIIA and IDD. Then click SAVE.

Once within the Street Interchange Application click on Manage Secondary Users
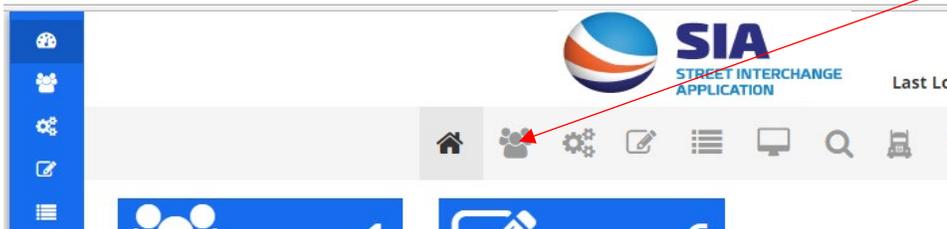
Set Permissions for the Secondary User – by checking the appropriate box – **"Initiate Interchange"** or **"Initiate Interchange & Approve"**. Once box is checked click on **SET OR MODIFY PERMISSIONS** and CLICK OK.

Setting Search Screen Display Preferences

Step 1:

Each Master User will have the ability to set its preferences on what information they would like to be displayed on the search results screen and in what order they want the data fields to be displayed. This preference selection will be seen by all secondary users associated with the account. To set this up, the logged in user will click the "computer" icon at the top of the page.
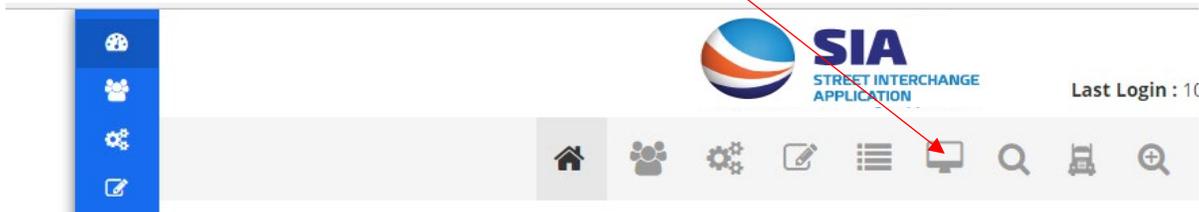
Setting Preferences for Fields:
Step 2:

The new Field Preference screen will allow the Master User to select the specific fields they wish to have returned on the search results screen and the order they want the information returned. The Excel download will also include the user's field preferences first and in the order selected. These selections will be seen by all secondary users associated with the account.

When on the screen all fields will initially be shown under "Preferred Fields" column. User will use the arrow buttons in the middle of the screen to move the fields they do not wish to have returned to the Available Fields column. Once user's selections have been made, they can then use the up and down arrow buttons to put the fields in the order they wish to have them displayed. Once all selections are the way the user would like them, click on SAVE.
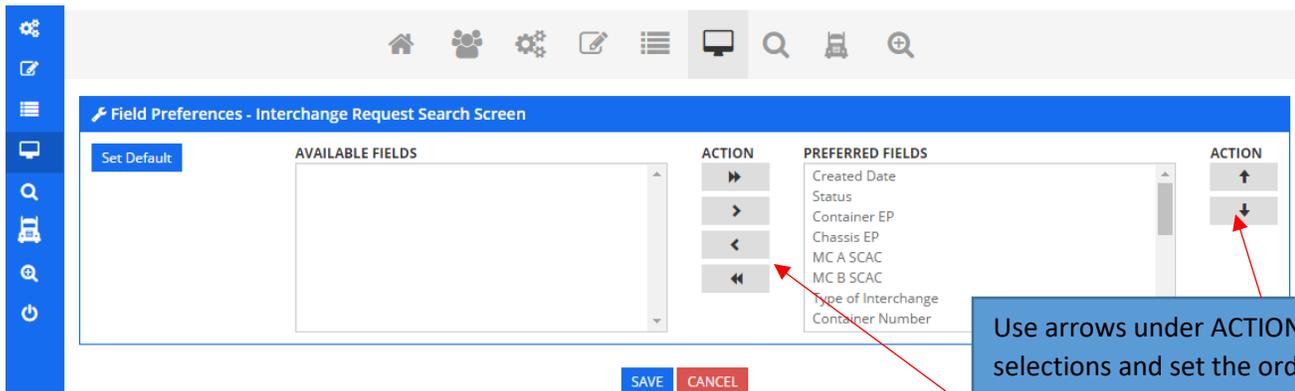
Use arrows under ACTION columns to make selections and set the order that fields will be displayed.

Note:

1. System will automatically default to showing all fields under Preferred Fields column. User can simply use the ◀◀ to move fields back to the Available Fields side so user can begin setting their preferences.
2. You can select fields from 'Available Fields' section and then click the appropriate arrow button to move the field(s) to 'Preferred Fields' section.
3. Press and hold Ctrl key to select multiple fields.
4. Once all fields are moved to 'Preferred Fields' section, you can then use the up/down arrows to put the fields in the order you wish to see them on the interchange request search screen and excel download.
5. Once fields are moved or ordered the way you wish to see them, please click SAVE button to commit the changes in order for it to take the effect on the interchange request search screen and excel download.

How to use buttons:

▶▶ use this button to move all the fields to your 'Preferred Fields' list.
▶ use this button to move selected field(s) from 'Available Fields' section to 'Preferred Fields' section.
◀ use this button to move selected field(s) from 'Preferred Fields' section to 'Available Fields' section.
◀◀ use this button to move all the fields to your 'Available Fields' list.
↑ use this button to put selected field up in the list.
↓ use this button to put selected field down in the list.

Home Page / Dashboard – gives information regarding secondary and third party users and shows snapshot of number of street interchange requests have been APPROVED, PUT ON HOLD, PENDING or REJECTED. In addition, the number of street interchange requests received year to date is also displayed.

Manage Secondary Users – gives secondary users listing (only ACTIVE secondary users from UIIA) and EP user can assign permission to the secondary users as shown in the screen shot below, which would be to allow the secondary user to Initiate Street Interchanges or to Initiate and Approve Street Interchanges.

Secondary Users List

User Name	Email	Status	Initiate Interchange	Initiate Interchange & Approve	Action
ABC1		ACTIVE	☑	☑	✏ SET OR MODIFY PERMISSIONS
ABC2		ACTIVE	☑	☑	✏ SET OR MODIFY PERMISSIONS
SEC1		ACTIVE	☐	☐	✏ SET OR MODIFY PERMISSIONS
SEC2		ACTIVE	☐	☐	✏ SET OR MODIFY PERMISSIONS
SEC3		ACTIVE	☐	☐	✏ SET OR MODIFY PERMISSIONS
SEC4		ACTIVE	☐	☐	✏ SET OR MODIFY PERMISSIONS
SEC5		ACTIVE	☑	☑	✏ SET OR MODIFY PERMISSIONS
SEC6		ACTIVE	☐	☐	✏ SET OR MODIFY PERMISSIONS

Method of Communication – this screen allows users to:

1) Set a flag to automatically approve street interchange/street turn requests as long as MC has a valid UIIA interchange with the specific EP.
2) Opt for Master UIIA account user to receive e-mail notification for all transactions submitted through the Street Interchange Application. Currently if user has selected email as method of communication, notifications go to the logged in user only.
3) Choose communication method as to how they wish to receive notifications from Street Interchange Portal. Available options are e-mail, EDI or XML. If e-mail selected, user can enter multiple e-mail addresses separated by semi-colon.

Manage Third Party Users – EP users may have third party users that are established to manage the interchange process on their behalf. EP will be able to manage these third party users by authorizing their access and abilities under the street interchange application via the screen below. EP may Enable/Disable user, set or modify permissions.

Search equipment available for interchange - This screen allows users to search equipment available for street interchange and it also allows users to initiate street interchange request on a unit that has been made available for street interchange. When a Motor Carrier adds a piece of equipment to the available pool for street interchange, the specific EPs associated with the equipment will be notified. The Equipment Provider and the Initiator of the request will have the ability to delete the equipment from the list of available equipment for street interchange.

User can Initiate a street interchange request or delete the unit from this screen by clicking on the appropriate buttons above.

Initiate Interchange Request – from this screen users will be able to initiate new street interchange request by entering all mandatory fields (noted w/red asterisk *). User would search the available equipment pool first and if equipment is not found then they would go to this screen to initiate a new street interchange request.

System would display the fields to be completed. System will validate whether the Chassis ID is registered in GIER to identify the Chassis IEP SCAC. System will check at this point to see whether MC B is valid with the EP SCAC for the container and EP SCAC for the Chassis in the UIIA (if the Chassis EP is a UIIA participant). If Chassis EP SCAC is not a UIIA participant, message will be returned, NON-UIIA EP and validation of the street interchange will only be provided for the Container EP.

If transaction goes through as set by the business rules, the specific EPs would receive notification to either approve or reject the street interchange request. Once approved by EPs, MC B would be notified to identify the condition of the equipment (Exhibit A of UIIA). If no issues noted by MC B on Exhibit A inspection, the street interchange would be automatically approved and all parties would be notified. If MC B notes any issues on the Exhibit A inspection, then MC A is notified and they must either agree or disagree with the equipment condition captured by MC B. All parties would be notified once MC A either agrees or rejects the Exhibit A inspection of MC B. MC A would also have the ability to put the transaction ON HOLD as well. The request can remain On Hold for 24 hours and if not action is taken then the request will be rejected. **Please note that the EP, MC A and MC B all must approve of the transaction before the street interchange will be complete**.

Note: If chassis field is left blank once user clicks submit, the system will auto populate the chassis ID field with ZZZZ999999 to identify it was a MC Provided Chassis so street interchange request will be for the container only.

Initiate Interchange Request – Confirmation Page - this screen provides confirmation of street interchange request from where user can go back and edit the information if there's typo. If not then user can hit "Confirm" button to submit the request. After confirmation user does have the ability to make modifications to the request as long as it is in a pending status. (New feature added 2/13/17)

Once Street Interchange Request is submitted the involved EPs will be notified that a request to Street Interchange the equipment has been initiated. As it is important that responses to the street interchange requests are done timely, EPs will receive a reminder every 30 minutes for any requests that have not been responded to.

Search Interchange Request – this screen allows users to search interchange requests by various parameters. User can download the results in excel file as well as perform action on the requests. User can hit "Go" button from the search results and perform various actions. There is an option to search by Request Type which would be Street Interchange (involving two different Motor Carrier companies) or Street Turn (involving one Motor Carrier that wants to re-use an import for an export move.)

Interchange request work flow – this screen allows users to perform action as well as it allows the EP user to view the workflow and status. User can has the ability to do the following if the transaction is still pending: 1) Edit the information, 2) Download information in PDF, 3) Approve transaction, 4) Reject transaction (will ask user to include reason for rejection), 5) Re-Initiate Request (if user wants to re-initiate this request that is similar to another request they wish to submit they can do so and just change the information that is different), 6) Close the screen. Note: **All parties must approve the transaction before it is completed. The workflow will identify the next step in the process.**

Note: **Exception to the above will be for Street Turn request (MC A and MC B are the same) – Business Flow for this type of transaction will be as follows:**

MC A Requests Street Turn (UIIA will validate that MC has valid interchange with associates EP(s))

EP Approves or Rejects Street Turn Request

If Approved by EP(s) – system will automatically approve street turn transaction and all parties will be notified.

If Rejected by EP(s) – system will notify all parties that transaction has been rejected.

Interchange Request Approver's Work Flow

1. **Scenario-1 – MC B / Secondary user of MC B or Active Driver of MC B is the initiator of Interchange Request**
   - 1st Approver would be EP / Designated Third party (EP secondary user can also approve if allowed). Note: EP for both the container and chassis would be required to approve interchange request as long as both EPs are UIIA participants.
   - Once request approved by EP(s), the system would then notify MC B to enter equipment condition as per UIIA Exhibit A.
   - If no conditions noted on Exhibit A by MC, the street interchange request would automatically be approved. If issues noted with the equipment condition by MC B, then MC A would be notified to see if they agreed with condition noted. MC A would have the ability to accept, reject or put the transaction on hold.
   - If MC A accepts equipment conditions noted by MC B, then all parties are notified that the street interchange request is completed. In a case of rejection or hold, all parties would be notified of this action by MC A and street interchange would not be completed.
   - All the parties involved in the transaction will be notified via EDI/XML/Email once request has been either approved, rejected or put on hold.

2. **Scenario-2 – MC A / Secondary user of MC A or Active Driver of MC A is the initiator of Interchange Request**
   - 1st Approver would be EP / Designated Third party (EP secondary user can also approve if allowed). Note: EP for both the container and chassis would be required to approve interchange request as long as both EPs are UIIA participants.
   - 2nd Approver would be MC B and the system would ask MC B to enter equipment condition as per UIIA Exhibit A
   - 3rd Approver would be MC A unless no conditions noted on Exhibit A inspection by MC B. (MC A can put the request on hold / reject / Accept). Note if no conditions noted on Exhibit A inspection by MC B, street interchange request would be automatically approved.
   - All the parties involved in the transaction will be notified via EDI/XML/Email once transaction has been approved, rejected or put on hold.

3. **Scenario-3 – EP / Secondary user of EP or designated third party of EP is the initiator of Interchange Request**
   - 1st Approver would be MC B and the system would ask MC B to enter equipment condition as per UIIA Exhibit A.
   - If issued noted on MC B Exhibit A inspection, then MC A would be notified to confirm it agrees with conditions noted. (MC A can put the request on hold / reject / Accept). Note if no conditions noted on Exhibit A inspection by MC B, street interchange request would be automatically approved.
   - All the parties involved in the transaction will be notified via EDI/XML/Email once transaction has been approved, rejected or put on hold.

4. **Scenario 4 – Street Turn Request (MC A and MC B are the same company – re-use of import container for export load)**

   - MC A submits requests for a street turn
   - System checks to see that MC A is approved for associated EP(s).
   - EP either approves or rejects transaction.
   - If EP approves, system automatically approves transaction and all parties notified.
   - If EP rejects, system notifies parties that transaction has been rejected.

   Important Note: The system will check pending street interchange/street turn transactions and will send notification to the party that is next to take action on the request every 30 minutes. A transaction can remain in pending status for 24 hours after which it will automatically get rejected and all the parties will be notified. The exception to this would be for requests that are submitted after 2pm (Eastern) on a Friday, the 24 hour clock will not start until Monday at 7am.

   Please note that the system is capable of accepting inbound EDIs to Street interchange system to approve/reject/On-hold transactions.

New Features that will be available effective February 13, 2017

NEW QUICK STREET TURN REQUEST SCREEN - SINGLE MOTOR CARRIER USING IMPORT FOR EXPORT

Abbreviated Request Form for Initiating a Street Turn for Same Motor Carrier

When the same Motor Carriers wants to re-use an Import Container for Export Move

Click where the red arrow points to get to the Street Turn Request Screen.

New Quick Street Turn Request
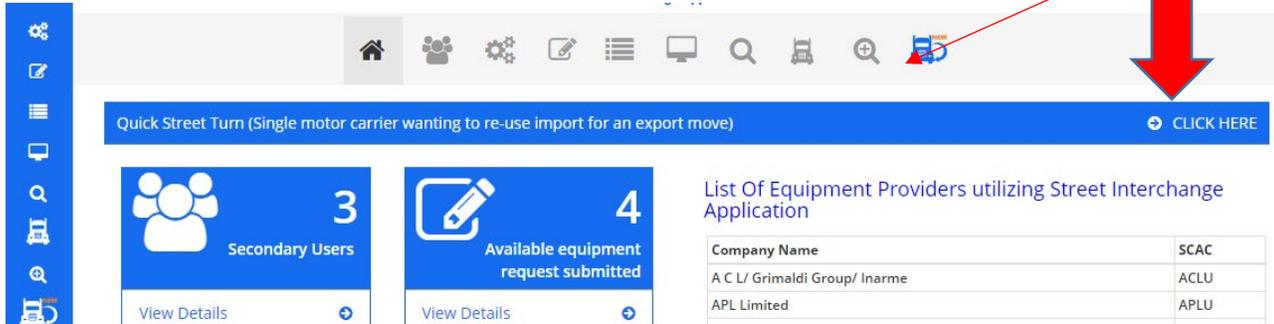
Note: **This screen can only be used for Street Turns involving one Motor Carrier only. For true Street Interchange transactions involving two different Motor Carriers, please click on the "truck icon" to initiate this type of request.**

NEW QUICK STREET TURN REQUEST SCREEN

Motor Carrier's SCAC Code and Company Name would be pre-populated based on logged in user. Motor Carrier would need to provide the following for the street turn request:

- Container EP Company/SCAC
- Import Booking Number (not mandatory)
- Export Booking Number – mandatory field
- Container Number (Ability to add more than one container on the request. If multiple containers entered an export booking is mandatory for each addl. container added. The system will generate a single street turn transaction for each container entered.
- Chassis Number (if applicable)
- Enter Location Name or Zip Code – Users can enter Location Name or Zip Code or Click on LOCATION LIST to select from the EP's specific original equipment locations. If selecting from the list click on the Location Name or IANA Code to populate the location into the Quick Street Turn template.

Enter Location Name or Zip Code or Click on LOCATION LIST link to select from EP Original Locations. Entry of location will be limited to EP's Original Location Table.
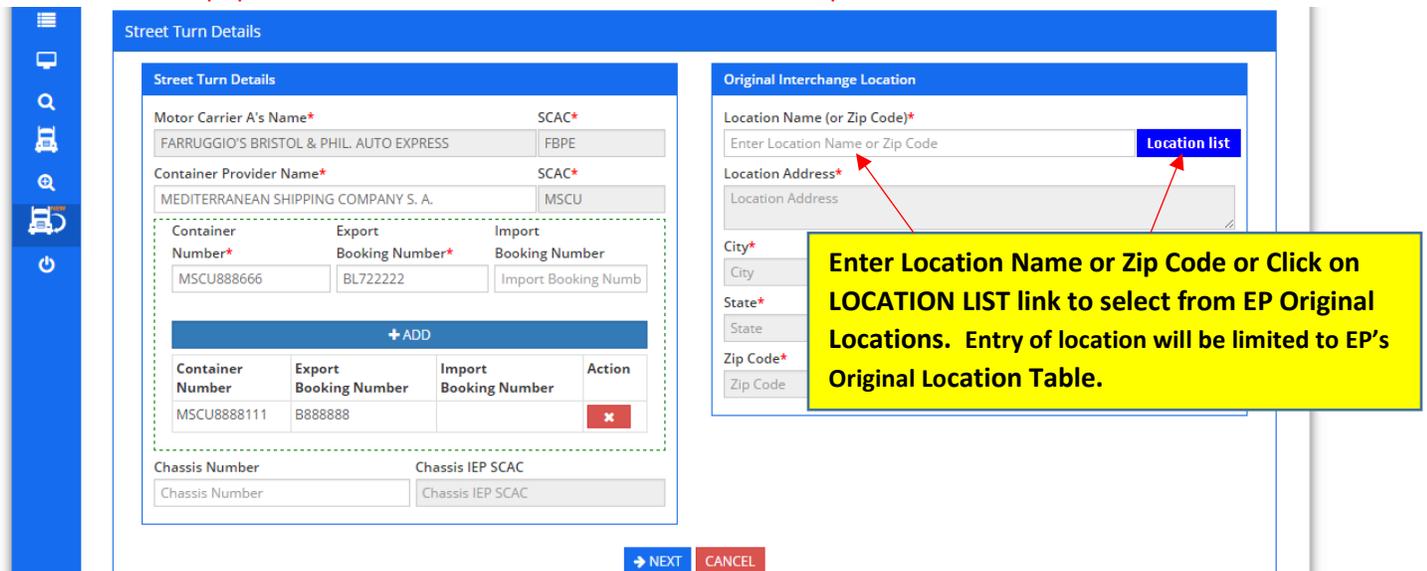
SAMPLE SCREEN WHEN USER CLICKS ON LOCATION LIST LINK -

User can select any of the locations by clicking on the number shown under the IANA CODE column. This will populate the location into the Quick Street Turn template.

ABILITY TO CANCEL or EDIT A PENDING REQUEST

Users will now have the ability to cancel or edit a street interchange/street turn request as long as the transaction is pending and has not yet been approved or rejected by the Equipment Provider. To edit or cancel a request, user would click on PENDING transactions from the home page –

This will take the user to the search screen where they can search their PENDING Transactions for the specific request they are looking for. Once found, user would click on the GO button under the ACTION column.

This will take the user to the detailed screen for the transaction where they can either click on EDIT or CANCEL the request.

EDITED Transactions - If editing the transaction, once changes are confirmed the transaction will remain pending with the new information and the EP will be notified of the updated request.

CANCELLED Transactions – If cancelling a pending transaction, user clicks on CANCEL REQUEST button and the system will show that the transaction has been cancelled as shown below.

Re-Initiate a Request that has been Cancelled

Users will also have the option to re-initiate a request that has been cancelled. User will go to CANCELLED transactions from their home page.
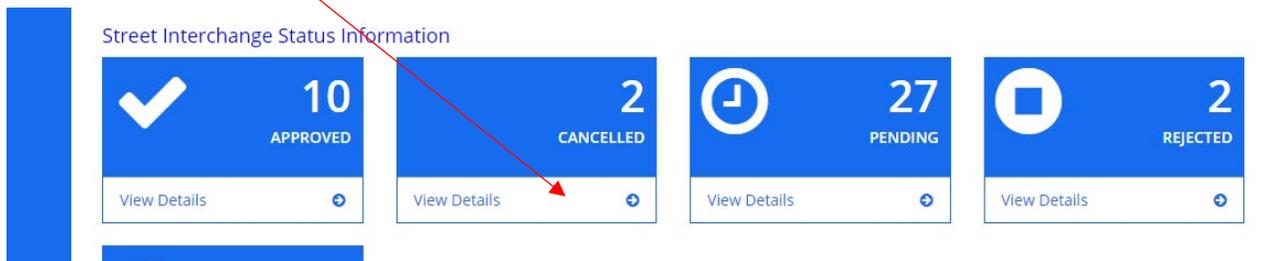
Once on the search results screen click on GO under the ACTION column to go to details for the specific transactions that you wish to re-initiate:

Once on the detailed screen for the transaction click on RE-INITIATE REQUEST BUTTON

User will update any information required on the transaction and then click NEXT and CONFIRM. Transaction will then be re-initiated and put in a pending status. A notice of the request will be sent to the specific Equipment Provider for approval.

Note: Users will also have the re-initiate option from the pending, active and rejected screens as well should they wish to re-initiate the request make the necessary changes and then re-submit the new request. This will save the user from having to re-enter all the fields if new request is similar to a prior request that had already been submitted.

NEW SEARCH FUNCTIONALITY – REQUEST TYPE

A new search parameter has been added to allow the user to search by the type of transaction whether it is a STREET INTERCHANGE (involving two motor carriers) or a STREET TURN (same Motor Carrier using import for export). Field defaults to ALL so will return both types of transactions.