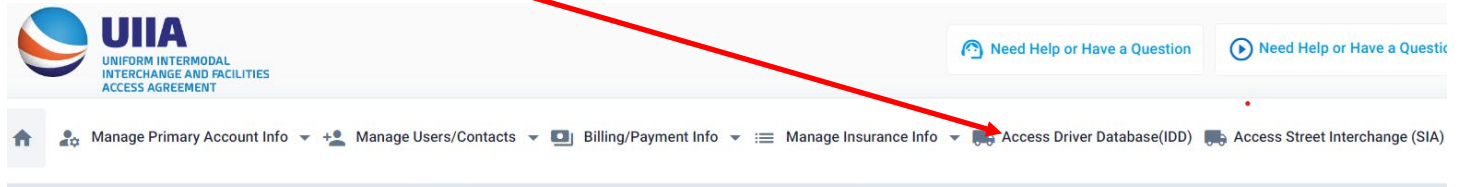**Street Interchange Portal – User Manual for Motor carriers**

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

MCs once logged into their UIIA account will see a link on the top navigation bar – Access Street Interchange Application (SIA) – this will take you directly into the application –

Alternatively, Motor carrier users - can login to SIA portal at **www.streetinterchange.com** using their SCAC and UIIA application password
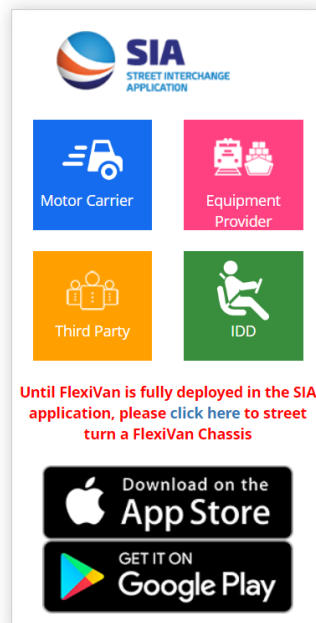

MC Secondary users – login to SIA portal at www.streetinterchange.com using MC SCAC and their UIIA username and password as assigned by the Motor Carrier when setting up the user in the UIIA. Alternatively, secondary users can access the Street Interchange application once logged into the UIIA application by clicking on the Access Street Interchange (SIA) link on the top menu bar.
www.streetinterchange.com

**Secondary User Access from within UIIA Application**
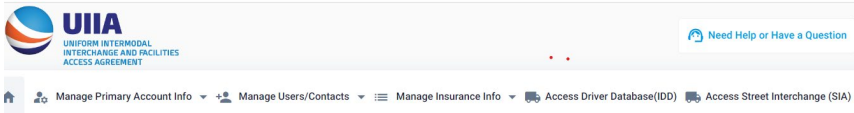
Adding Secondary Users - To add a secondary user, the main UIIA contact will need to add the individual under the secondary user feature in the UIIA program. Once added, then go to the Street Interchange Application and set the user's permissions as to whether you want the user to be able to **Initiate Street Interchanges** or **Initiate and Approve Street Interchanges** on your company's behalf.

**Add Secondary User from UIIA application - Click on Secondary Users under Manage Users/Contacts**
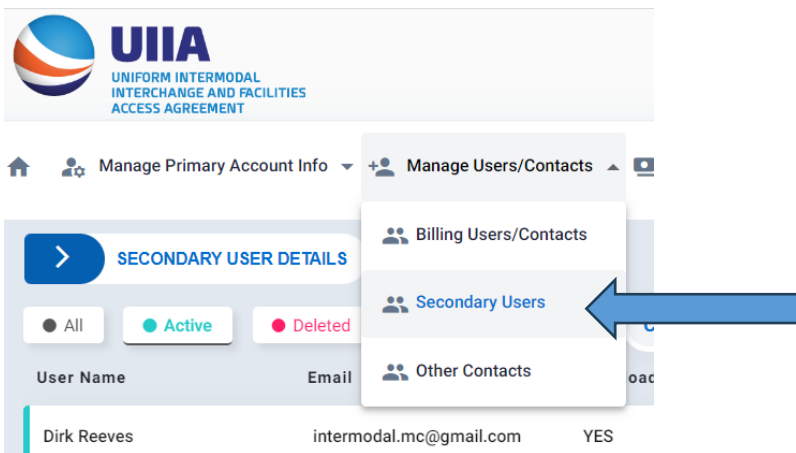
Click on ADD USER and then add new secondary user name, password, email and whether the user should have read only rights within the UIIA and IDD. Then click SAVE.
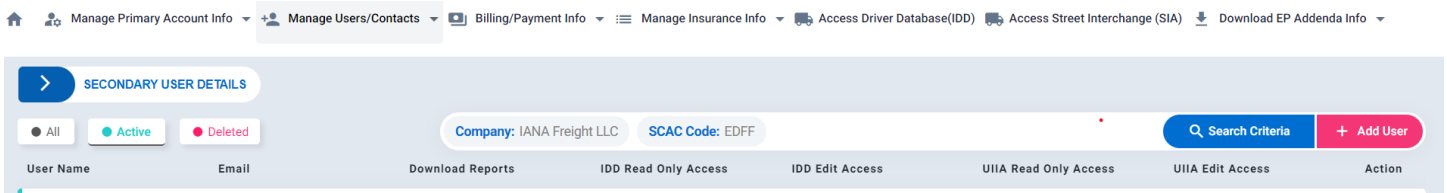
Go to the Street Interchange Application from UIIA Navigation Bar and then once within SIA Application click on Manage Secondary Users
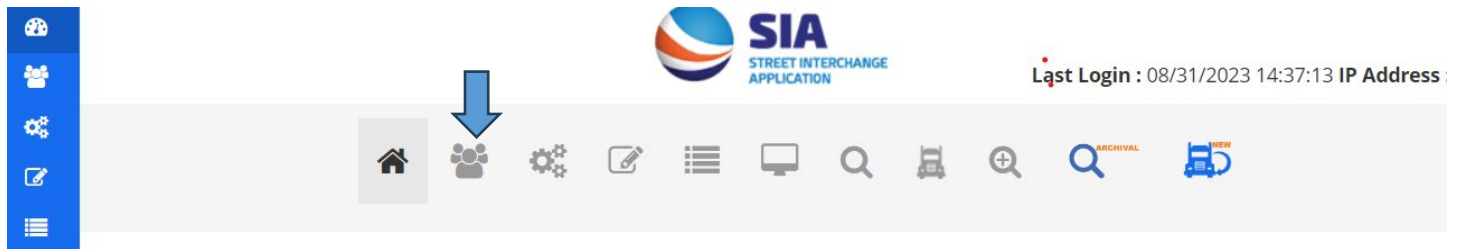
Set Permissions for the Secondary User – by checking the appropriate box – **"Initiate Interchange"** or **"Initiate Interchange & Approve"**. Once box is checked click on **SET OR MODIFY PERMISSIONS** and CLICK OK.

Click on Set or Modify Permissions and then click on OK

MC Drivers – can login to SI portal using 8-digit IDD Pin assigned by IANA and MC SCAC OR Driver's license number, state of issuance and MC SCAC. A validation will be done against IANA's IDD to ensure the driver accessing the Street Interchange portal is an active driver for the MC SCAC.

Notifications from the Street Interchange Application

All notifications from the Street Interchange application will go to the logged in user unless the main UIIA contact as set the configuration settings to also receive a copy of any notice generated from the Street Interchange application.

Should the master UIIA contact wish to set the configurations to receive a copy of all notices, they would go to the Method of Communications screen and set the flag to receive all notices.

Setting Search Screen Display Preferences

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. These preferences will be seen by all secondary users associated with the account as well. To set this up, the logged in user will go to the computer icon at the top of the page.
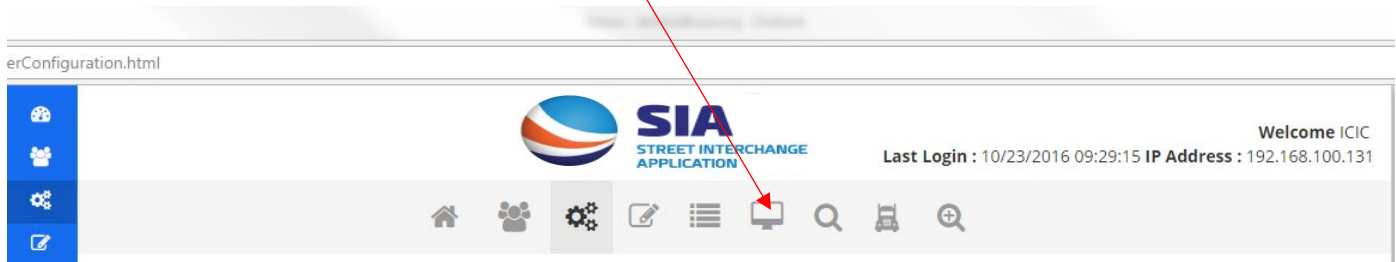
Setting Preference for Fields:

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 [...] 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.

Note: All preference selections by the Master User on the account will be seen by all secondary users when logged in.

1. **Home Page / Dashboard –** This screen provides information regarding secondary users. It also provides a snapshot of the number of available equipment requests that have been submitted by the MC SCAC, how many street interchanges have been approved or are pending by the MC and the number of street interchange requests that have been requested by the MC SCAC year to date.

2. **Manage Secondary Users –** gives secondary users listing (only ACTIVE secondary users from the UIIA application). The MC can assign specific permissions to the users as to whether the secondary user can Initiate Street Interchanges and/or Initiate Street Interchanges as well as approve the street interchange transactions on behalf of the MC SCAC.

3. **Method of Communication –** this screen allows users to choose communication method as to how they wish to receive notifications from Street Interchange Portal. E-mail, EDI322 or XML via SFTP are the options for communications.

4. **Notification of Available Equipment –** from this screen, the Motor Carrier, Approved Motor Carrier Secondary User or Driver will be able to notify EP or authorized Third Party for the EP that equipment is available for street interchange. Upon entering chassis number, the system makes a request to GIER system and identifies the responsible IEP for the unit. If unit is not in GIER then system will display "IEP NOT FOUND IN GIER" under "Chassis IEP SCAC" field. The system will also validate if the EP for the container is a participant in the IANA Street Interchange Application.

Note:
1) 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.
2) The IANA Location Code table will be used for Equipment Location and original Interchange Location fields. User will be able to lookup location by entering the first three number is zip code or entering a zip code range. If location is found it will be populated. If not found, user will have the ability to enter the location in the field. If the request is being made by mobile device then the zip code will be pre-populated based on GPS location.

Notification of Available Equipment

Container Provider Name*		SCAC*	Chassis Number
Container Provider Name		SCAC	Chassis Number
Motor Carrier Name*		SCAC*	Chassis IEP SCAC
Acord Testing 2		IAAB	Chassis IEP SCAC
Load Status*			Chassis Type**
SELECT LOAD STATUS			SELECT CHASSIS TYPE
Container Number*			Chassis Size **
Container Number			SELECT CHASSIS SIZE
Container Type*			Genset Number
SELECT CONTAINER TYPE			Genset Number
Container Size*			Was DVIR processed on unit Y or N ?
SELECT CONTAINER SIZE			N

Equipment Location

Zip Code *
Zip Code

Location Name*
Location Name

Location Address*
Location Address

City*
City

State*
State

Original Interchange Location

Zip Code*
Zip Code

Location Name*
Location Name

Location Address*
Location Address

City*
City

State*
State

5. **Notification of Available Equipment w/ DVIR –** from this same screen, user will have the ability to identify if a DVIR was reported for the equipment. If user selects "Y" for YES a DVIR was reported, then the system will open up DVIR pop up where user can report DVIR related information. The system would consider equipment location as the location where the DVIR occurred. Note DVIR Y/N field is optional if user if a Motor Carrier or Secondary User for a Motor Carrier, however if Driver the DVIR Y/N field is mandatory.

6. **Notification of Available Equipment – Confirmation Page –** this screen provides confirmation of the request to submit equipment into the available pool for street interchange. 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 will not be able to make any modification to the request. **Please note that this does not initiate a street interchange request on the equipment. User would need to go to INITIATE Street Interchange to start this process.**

7. **Notification of Available Equipment Report –** users will be able to pull reports on the notifications (of available equipment) that was submitted by their company.

Note: Chassis Number ZZZZ999999 populated in the chassis number field identifies MC Provided Chassis.

8. **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.

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

9. **Initiate Street Interchange Request (When MC A and MC B are different companies) –** from this screen users will be able to initiate new street interchange request by entering all mandatory fields (noted w/red *). User would have searched the available equipment for interchange first and if equipment is not found it would then 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. If MC B is initiating the interchange request, the 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 Chassis EP SCAC is not 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. Note: MC A may also put the transaction "On Hold". Transaction will stay "On Hold" for 24 hours and if not action the request will be rejected and all parties notified. **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 no chassis provided on street interchange request, once user clicks submit the system will auto populate ZZZZ999999 for the chassis ID to identify that it was a MC Provided Chassis.

10. 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 will 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.

NOTE: **STREET TURNS (MC A and MC B are the same company)**

            For street turns when MC A wants to re-use an import container for an export load, the business rules will be modified to automatically approve the street turn request once it is approved by the applicable EP(s).

11. 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.

12. Interchange request work flow – this screen allows users to perform action as well as it allows user to view the workflow and status. User can 1) Edit the request (if pending), 2) Download the request information in PDF, 3) Approve Request, 4) Reject Request (will require a reason to be provided), 5) Re-Initiate a Request (user can utilize this feature if they have a similar request. By using re-initiate the system will display all info pre-populated and only needs to change the necessary fields that are different with the new request, 6) On-Hold – this feature is available only to MC A if they do not agree with pre-trip inspection submitted by MC B. On-Hold transactions will stay in this status for 24 hours. If no action taken within the 24 hour period, the request will be rejected and all parties would be notified. **Note: All parties (EP, MC A and MC B) 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 transactions and will send notification to the party that is next to take action on the transaction 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. Also, the system will be 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.
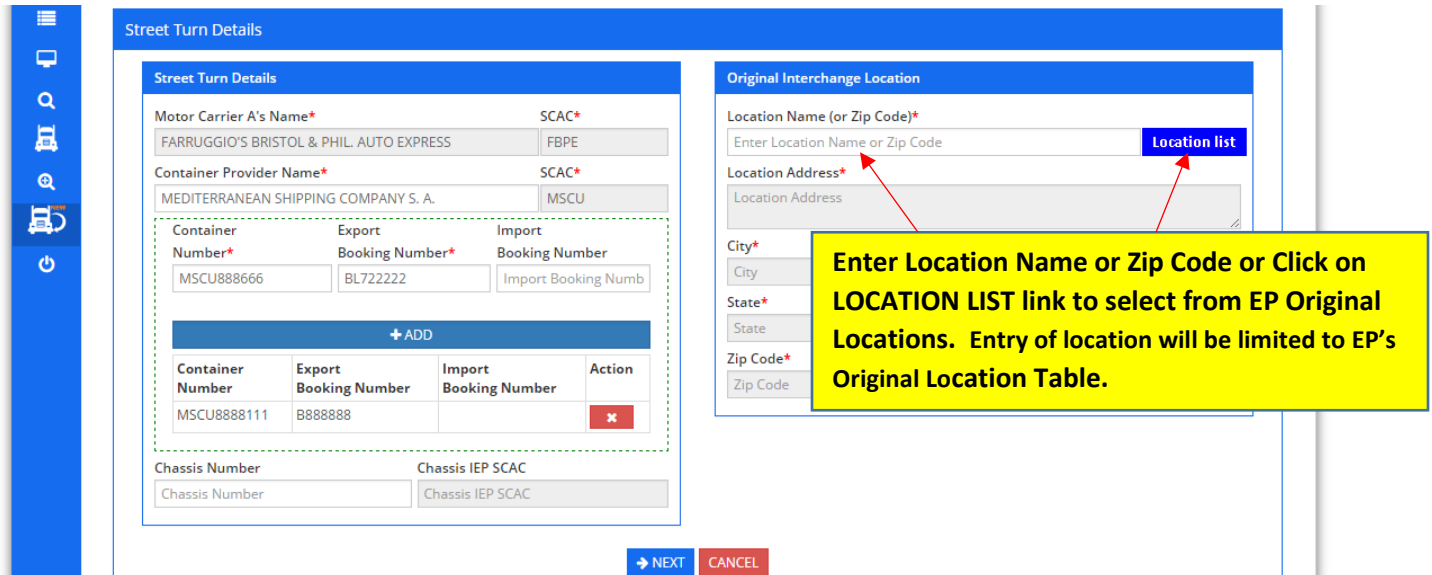
New Quick
Street Turn
Request
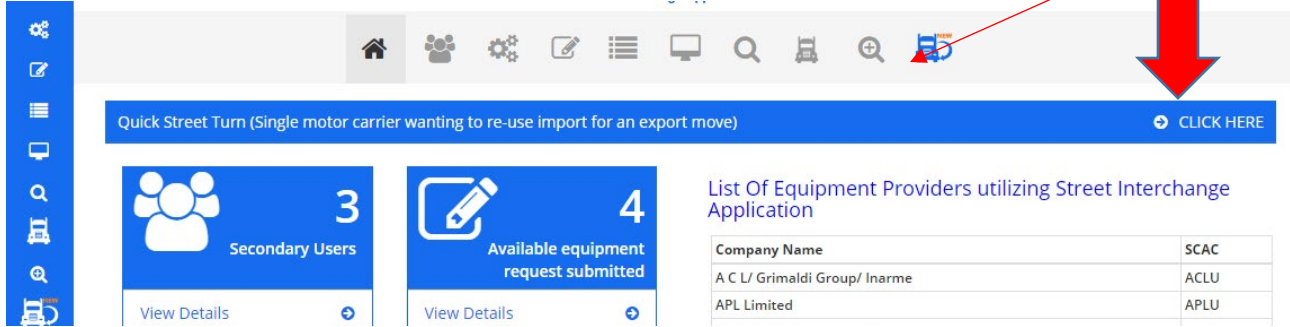
Note: This screen can only be used for Street Turns involving one Motor Carrier only. For true Street Interchange transactions involving two different Motor Carriers, please click on the "truck icon" to initiate this type of request.

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.

ginal Interchange Location Selection

: In order to select the location, click on the link provided on Location Name or IANA Code.

Click on LOCATION NAME OR IANA Code to select a location

Location Name Or Zip

| Equipment Location Name Or Zip |

IANA Code

| IANA Code |

SPLC Code

| SPLC Code |

SEARCH   CLOSE

☰ Search Result

Location Name	IANA Code	SPLC Code	City	State	Zip
BNSF - BIRMINGHAM (BIR)	3520401	472600	BIRMINGHAM	AL	35204
NS - HUNTSVILLE INT'L INTERMODAL CENTER (HUN)	3582402	471340	HUNTSVILLE	AL	35824
CSX - Mobile, AL	3660201	479800	Mobile	AL	36602
MOBILE TERMINAL	3660302	479800305	MOBILE	AL	36603
BNSF - Hobart (HOB)	9002301	883000	Los Angeles	CA	90023
APM LOS ANGELES	9073102	883000310	TERMINAL ISLAND	CA	90731
WEST BASIN CONTAINER TERMINAL	9073109	883251302	SAN PEDRO	CA	90731
PACIFIC CONTAINER TERMINAL	9080204	883660309	LONG BEACH	CA	90802
PIER A	9081306	883660323	LONG BEACH	CA	90813
APM OAKLAND	9460701	876430321	OAKLAND	CA	94607

Go to Page: 1 ▼   « ‹ 1 › »   Records Per Page: 10 ▼

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 –

Quick Street Turn   ⊕ CLICK HERE

3 Secondary Users		**4** Available equipment request submitted	List Of Equipment Providers utilizing Street Interchange Application	
View Details ⊙		View Details ⊙		

Company Name	SCAC
A C L/ Grimaldi Group/ Inarme	ACLU
APL Limited	APLU
CMA-CGM (America) LLC	CMDU
Hapag-Lloyd (America) Inc.	HLCU
Hyundai Merchant Marine, Inc.	HDMU
Mediterranean Shipping Company S. A.	MSCU

Street Interchange Status Information

✔ **10** APPROVED	⬛ **1** CANCELLED	🕐 **28** PENDING	⬛ **2** REJECTED
View Details ⊙	View Details ⊙	View Details ⊙	View Details ⊙

◔ **41** Interchange requests YTD
View Details ⊙

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.
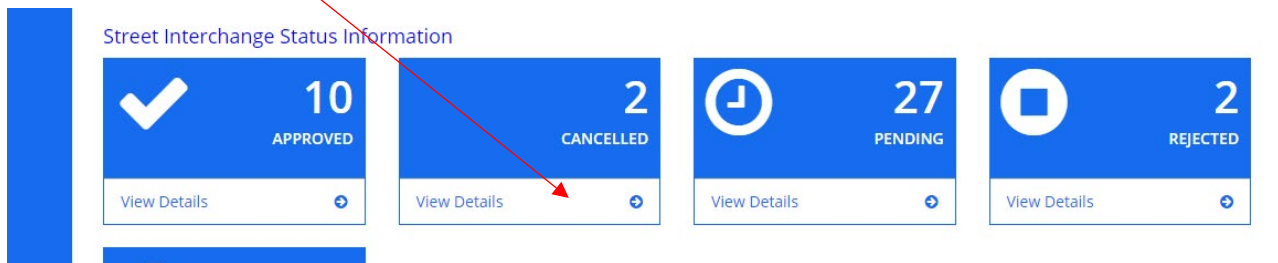
Re-Initiate a Request that has been Cancelled

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:
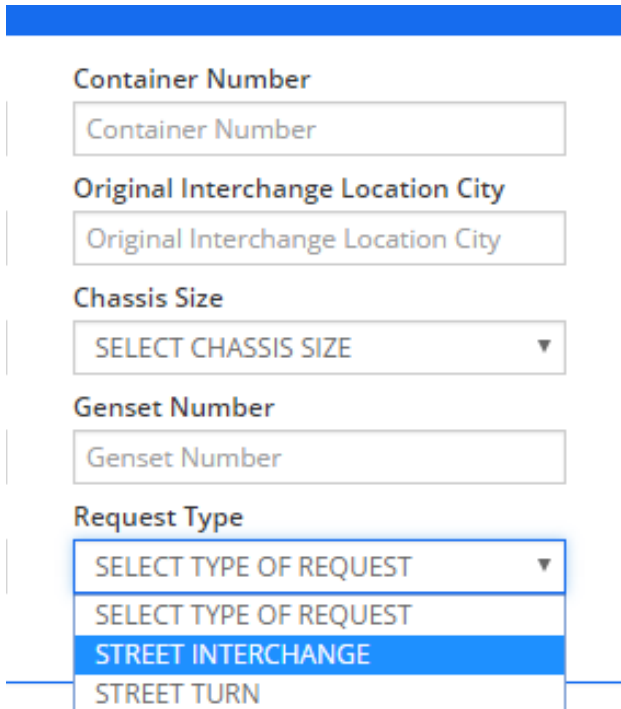

Once on the detailed screen for the transaction click on RE-INITIATE REQUEST BUTTON

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.

Container Number

Container Number

Original Interchange Location City

Original Interchange Location City

Chassis Size

SELECT CHASSIS SIZE ▾

Genset Number

Genset Number

Request Type

SELECT TYPE OF REQUEST ▾

SELECT TYPE OF REQUEST
STREET INTERCHANGE
STREET TURN