Letter of Authorization (LOA) User Guide

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# Table of Contents

Welcome to LOA ............................................................................................................................ 1  
Getting Started ............................................................................................................................... 2  
   Register to Use Railinc SSO ........................................................................................................ 2  
   Requesting LOA Access ............................................................................................................. 3  
   Accessing the Railinc Customer Success Center ..................................................................... 3  
LOA Interface Overview ............................................................................................................... 4  
   General Users Interface and System Requirements .................................................................. 4  
   LOA Web Interface ..................................................................................................................... 4  
      LOA Web Page Layout ............................................................................................................ 4  
      Logging In ................................................................................................................................. 6  
      Logging Out .............................................................................................................................. 6  
Enter LOA Id .................................................................................................................................. 7  
My LOAs ........................................................................................................................................ 7  
Create LOA .................................................................................................................................... 9  
   Selecting Grantee/Grantor and Template .................................................................................. 9  
   Creating an LOA ........................................................................................................................ 10  
Search LOA .................................................................................................................................. 20  
   Viewing Search Results .......................................................................................................... 21  
   Viewing Documents .................................................................................................................. 22  
   Viewing Approved LOAs ......................................................................................................... 23  
Managing LOAs ............................................................................................................................. 24  
   Approving/Rejecting LOAs ....................................................................................................... 24  
   Revoking LOAs ......................................................................................................................... 24  
   Editing LOAs ............................................................................................................................. 25  
   Cloning LOAs ............................................................................................................................ 26  
   Revalidating LOAs .................................................................................................................... 27  
   Expiring LOAs .......................................................................................................................... 28  
   Renewing LOAs ........................................................................................................................ 28  
LOA Templates ............................................................................................................................. 30  
   View Template ......................................................................................................................... 31  
   Add LOA Template ................................................................................................................... 32  
   Apply Template ......................................................................................................................... 32  
   Edit Template ........................................................................................................................... 33  
   Clone Template ......................................................................................................................... 33  
Appendix A—Category Descriptions .......................................................................................... 34  
Index .............................................................................................................................................. 38
List of Exhibits

<table>
<thead>
<tr>
<th>Exhibit</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exhibit 1</td>
<td>Railinc Home Page with Customer Login</td>
<td>2</td>
</tr>
<tr>
<td>Exhibit 2</td>
<td>LOA Request Permission</td>
<td>3</td>
</tr>
<tr>
<td>Exhibit 3</td>
<td>LOA Web Application Page Layout</td>
<td>4</td>
</tr>
<tr>
<td>Exhibit 4</td>
<td>LOA Home/My LOAs</td>
<td>6</td>
</tr>
<tr>
<td>Exhibit 5</td>
<td>LOA Application Menu Functions (and other home page tasks)</td>
<td>6</td>
</tr>
<tr>
<td>Exhibit 6</td>
<td>Enter LOA Id Lookup</td>
<td>7</td>
</tr>
<tr>
<td>Exhibit 7</td>
<td>My LOAs</td>
<td>7</td>
</tr>
<tr>
<td>Exhibit 8</td>
<td>Tabbed Filtering Tool</td>
<td>7</td>
</tr>
<tr>
<td>Exhibit 9</td>
<td>LOA Id hyperlinks</td>
<td>8</td>
</tr>
<tr>
<td>Exhibit 10</td>
<td>PDF Icons</td>
<td>8</td>
</tr>
<tr>
<td>Exhibit 11</td>
<td>Numbered Page Tabs</td>
<td>8</td>
</tr>
<tr>
<td>Exhibit 12</td>
<td>Options to Control Number of Records Displayed</td>
<td>8</td>
</tr>
<tr>
<td>Exhibit 13</td>
<td>Grantee or Grantor Pop up with Template Option</td>
<td>9</td>
</tr>
<tr>
<td>Exhibit 14</td>
<td>Grantee or Grantor Pop up with Grantee selected</td>
<td>10</td>
</tr>
<tr>
<td>Exhibit 15</td>
<td>Grantee or Grantor Pop up with Grantor selected</td>
<td>10</td>
</tr>
<tr>
<td>Exhibit 16</td>
<td>Create LOA (Grantee tab when Grantee is selected)</td>
<td>11</td>
</tr>
<tr>
<td>Exhibit 17</td>
<td>Create LOA (Grantee tab when Grantor is selected)</td>
<td>11</td>
</tr>
<tr>
<td>Exhibit 18</td>
<td>Create LOA (Grantor tab when Grantee is selected)</td>
<td>12</td>
</tr>
<tr>
<td>Exhibit 19</td>
<td>Create LOA (Grantor tab when Grantor is selected)</td>
<td>13</td>
</tr>
<tr>
<td>Exhibit 20</td>
<td>Create LOA (Add Categories tab)</td>
<td>14</td>
</tr>
<tr>
<td>Exhibit 21</td>
<td>Sub-Category Selection for Equipment Health</td>
<td>15</td>
</tr>
<tr>
<td>Exhibit 22</td>
<td>Categories and Subcategories (subject to change)</td>
<td>16</td>
</tr>
<tr>
<td>Exhibit 23</td>
<td>Create LOA (Set Up Categories tab)</td>
<td>17</td>
</tr>
<tr>
<td>Exhibit 24</td>
<td>Marks Selection Look Up</td>
<td>17</td>
</tr>
<tr>
<td>Exhibit 25</td>
<td>Users Selection Look Up</td>
<td>17</td>
</tr>
<tr>
<td>Exhibit 26</td>
<td>Set Up Categories with Mark applied to all</td>
<td>18</td>
</tr>
<tr>
<td>Exhibit 27</td>
<td>Submitted LOA</td>
<td>19</td>
</tr>
<tr>
<td>Exhibit 28</td>
<td>Search for Letter of Authorization</td>
<td>20</td>
</tr>
<tr>
<td>Exhibit 29</td>
<td>LOA Search Results</td>
<td>21</td>
</tr>
<tr>
<td>Exhibit 30</td>
<td>Attached PDF Document Window</td>
<td>22</td>
</tr>
<tr>
<td>Exhibit 31</td>
<td>View of Approved LOA with Limit</td>
<td>23</td>
</tr>
<tr>
<td>Exhibit 32</td>
<td>Actions for Approved LOAs</td>
<td>23</td>
</tr>
<tr>
<td>Exhibit 33</td>
<td>View of LOA with Clone and Revoke options</td>
<td>24</td>
</tr>
<tr>
<td>Exhibit 34</td>
<td>Edit Categories Tab</td>
<td>25</td>
</tr>
<tr>
<td>Exhibit 35</td>
<td>Set Up Categories Tab</td>
<td>25</td>
</tr>
<tr>
<td>Exhibit 36</td>
<td>Revalidation E-Mail to Grantor with Application Link</td>
<td>27</td>
</tr>
<tr>
<td>Exhibit 37</td>
<td>Renew LOA Button</td>
<td>28</td>
</tr>
<tr>
<td>Exhibit 38</td>
<td>LOA Submitted</td>
<td>29</td>
</tr>
<tr>
<td>Exhibit 39</td>
<td>LOA Email Notification</td>
<td>29</td>
</tr>
<tr>
<td>Exhibit 40</td>
<td>LOA Templates</td>
<td>30</td>
</tr>
<tr>
<td>Exhibit 41</td>
<td>LOA Templates Action Menu</td>
<td>30</td>
</tr>
<tr>
<td>Exhibit 42</td>
<td>Template Name Hyperlink (to view an LOA template)</td>
<td>31</td>
</tr>
<tr>
<td>Exhibit 43</td>
<td>View LOA Template</td>
<td>31</td>
</tr>
<tr>
<td>Exhibit 44</td>
<td>Grantee or Grantor Popup (for LOA Templates)</td>
<td>32</td>
</tr>
<tr>
<td>Exhibit 45</td>
<td>Apply Template Action</td>
<td>32</td>
</tr>
<tr>
<td>Exhibit 46</td>
<td>Edit LOA Template</td>
<td>33</td>
</tr>
<tr>
<td>Exhibit 47</td>
<td>LOA Template Name Field</td>
<td>33</td>
</tr>
</tbody>
</table>
Welcome to LOA

Railinc uses Letter of Authorization to ensure that appropriate data is sent only to authorized parties. Third-party logistics providers (3PLs) are commonly used in the rail industry. These companies provide different services, including shipment management, asset management, and related application services to companies that are shippers, consignees, or equipment owners.

Letter of Authorization (LOA) is a web-based application that allows users to electronically submit, approve, expire, and renew letter of authorization.
Getting Started

The LOA application is accessed using the Railinc Single Sign On (SSO), which can be accessed from the Railinc portal at http://www.railinc.com. The SSO log in is located at the upper right of the page under Customer Login (Exhibit 1).

Exhibit 1. Railinc Home Page with Customer Login

Register to Use Railinc SSO

Each LOA user must register in Railinc Single Sign On (SSO) prior to using the LOA application. To begin this process, select the “Need to Register?” link on the Railinc home page (see Exhibit 1). Refer to the Railinc Single Sign On User Guide for detailed instructions.

Once SSO registration is complete, the user must request access to LOA within SSO.
Requesting LOA Access

After authorization to use Railinc SSO is received, the user must request general access to LOA by following instructions in the Railinc Single Sign On User Guide.

Exhibit 2. LOA Request Permission

A user must select the LOA User role and then the Submit button to request LOA access. Once approved, an email is sent. When e-mail notification of access to LOA is received, the user can log in and begin using LOA.

Accessing the Railinc Customer Success Center

The Railinc Customer Success Center provides reliable, timely, and high-level support for Railinc customers. Representatives are available to answer calls and respond to emails from 7:00 a.m. to 7:00 p.m. Eastern time, Monday through Friday, and provide on-call support via pager for all other hours to ensure support 24 hours a day, 7 days a week. Contact us toll-free by phone at 877-RAILINC (1-877-724-5462) or send an email directly to csc@railinc.com.
LOA Interface Overview

General Users Interface and System Requirements

General user interface information (typical keyboard selection equivalents and shortcuts), as well as system requirements are available in the Railinc UI Dictionary. Application-specific interface information is described in the next section.

LOA Web Interface

The LOA interface provides the same navigational tools found in most Windows applications and Internet sites. This section provides basic explanations of the elements and components that assist in moving through the various pages of the application to complete tasks.

LOA Web Page Layout

Each page in LOA has the same structure.

Exhibit 3. LOA Web Application Page Layout

2. Application Title—Name of the application.
3. Sign-On Information—Shows the currently logged on user.
4. Navigational Links—Links for the following functions:
   - Launch Pad—closes LOA and returns to user’s Launch Pad page.
• **Contact Us**—opens a page of contact information for the Railinc Customer Success Center.

• **Sign Out**—logs out of all SSO applications and returns to the Railinc SSO Login page.

5 **Main Menu**—The options on this menu allow user to perform the various functions of the application. This includes My LOAs (with the ability to manage existing LOAs), Create LOA, Search LOA, and Help Guide (a link to the most current version of this User Guide). There is also a quick search option to enter an LOA ID and select **Search** (see Enter LOA Id).

6 **Action Tabs/Page Title**—Depending on the page, either includes linked tabs (such as displayed here that allows users to filter the types of LOAs being displayed) or a title that indicates the current function or task being executed.

7 **Page content area**—The area of the page where data is displayed and tasks are executed (shown outlined with red dashes). These vary and may include a number of different elements, which are described in the next sections.

8 **Navigation Links**—Numbered links allow users to move through all of their LOAs page by page as well as determine how many LOAs to display.
Logging In

To log into LOA:

1. Open the browser.
3. Log in to SSO (at upper right).
4. On the Launch Pad My applications portlet (upper left), select Letter of Authorization. The LOA Home/My LOAs page is displayed (Exhibit 4).

Exhibit 4. LOA Home/My LOAs

Continue by selecting an LOA application menu item (refer to Exhibit 5). The LOA Home page has the following tabs/menus:

Exhibit 5. LOA Application Menu Functions (and other home page tasks)

- **My LOAs**: Returns to the LOA Home/My LOAs page (Exhibit 4).
- **Enter LOA Id**: Provides a quick search by LOA Id (see Exhibit 6).
- **Create LOA**: Begins the Create a Letter of Authorization process (see Create LOA).
- **Search LOA**: Opens the Search LOA page (Exhibit 28).
- **LOA Templates**: Opens the LOA Template page where new templates can be created and existing templates can be managed (Exhibit 40).

Logging Out

Select the Sign Out link to end an LOA session.
Enter LOA Id

From the home page, users can directly go to an LOA by using the Enter LOA Id lookup (Exhibit 6).

Exhibit 6. Enter LOA Id Lookup

1. Enter the LOA Id in the Enter LOA Id lookup (Exhibit 6).
2. Select Search. The details page for that LOA is displayed (see Viewing Search Results).

My LOAs

The My LOAs (Exhibit 7) page allows users to view and manage all their company’s LOAs. This page appears by default as the home page and can also be accessed via the menu by selecting My LOAs.

Exhibit 7. My LOAs

From this page the following actions are possible:

- Use the tabbed filtering tool (Exhibit 8) at the top of the page to switch between LOAs in different statuses (Action Required, All, Approved, Submitted (pending), Expired/Rejected, or Draft).

Exhibit 8. Tabbed Filtering Tool

- Select a listed LOA Id hyperlink (Exhibit 9) to view the details of the LOA and to perform possible actions (see Exhibit 27 as an example).
Exhibit 9. LOA Id hyperlinks

<table>
<thead>
<tr>
<th>Id</th>
</tr>
</thead>
<tbody>
<tr>
<td>41</td>
</tr>
<tr>
<td>61</td>
</tr>
<tr>
<td>1200</td>
</tr>
</tbody>
</table>

- The PDF column is located in the far right column and only appears for All or Approved search results. PDFs are only available for Approved LOAs. Click on the PDF icon to view the listed LOA in PDF format (see Exhibit 30 as an example). Also see Viewing Approved LOAs.

Exhibit 10. PDF Icons

- Use the numbered page tabs (Exhibit 11) on the bottom left to move between multiple pages of search results. The left and right arrow can also be used to search one page at a time.

Exhibit 11. Numbered Page Tabs

- View 25, 50 or 100 entries at a time by selecting either the 25, 50 or 100 count links (Exhibit 12) at the bottom right of the page.

Exhibit 12. Options to Control Number of Records Displayed

- To download search results into a spreadsheet, click the green XLS icon in the top right corner above the search results and open or save the file to your computer.

Exhibit 13. Download search results to a spreadsheet
Create LOA

Selecting Grantee/Grantor and Template

The first step in creating a new Letter of Authorization is determining if you are the Grantee or Grantor in the arrangement. Second is deciding if you want to use a created template to populate the fields in the LOA.

Note: The option to use templates will not appear if you haven’t already created any templates. Additionally, the templates that are available from the drop down correspond to the selected role of grantee or grantor, as created templates are specific to the LOA role. See LOA Templates for details on templates.

1. On the main menu, select Create LOA. A pop up appears (Exhibit 13) asking you to define your role in the process (either Grantee or Grantor). Additionally there is an option to have a template applied as the basis of the new LOA. This requires selecting the “Use Template” option and then selecting the template to use in the drop-down. See Apply Template for further details.

Exhibit 13. Grantee or Grantor Pop up with Template Option

Note: Here’s a quick explanation of the difference in the roles. These explanations are available as a reminder whenever either option is selected.
   GRANTEE: requesting access to someone else’s data.
   GRANTOR: owner of the data.

2. Determine which role is appropriate and if a template should be used or not. Continue with Creating an LOA.
Creating an LOA

1. Initiate the LOA process by performing the steps in Selecting Grantee/Grantor and Template. Select either Grantee or Grantor on the Grantee or Grantor Pop up. A tip appears to remind the user of the responsibility for that role. Exhibit 14 shows the tip when Grantee is selected and Exhibit 15 shows a tip when Grantor is selected.

Exhibit 14. Grantee or Grantor Pop up with Grantee selected

Exhibit 15. Grantee or Grantor Pop up with Grantor selected

2. If you want to use a template to create the LOA, select the Use Template option. Use the drop-down box that appears to select the desired template (see Apply Template for further details).

3. Select Continue. This Create LOA (Grantee tab) is displayed when Grantee is selected (Exhibit 16). This Create LOA (Grantee tab) is displayed when Grantor is selected (Exhibit 17).
Exhibit 16. Create LOA (Grantee tab when Grantee is selected)

Exhibit 17. Create LOA (Grantee tab when Grantor is selected)

4. Complete the available input fields. If a entered company has more than one address on file, then an Address Select field appears with a drop-down. This drop down can be used to
select the appropriate address. It is possible to use a non-listed address by entering it manually.

5. Enter a **Primary Contact**. This is mandatory and the associated email address cannot be a distribution list. It must be a specific individual. The Secondary and Third Contact inputs are optional, but be aware that all contacts listed on the LOA have the ability to manage the LOA within the application. All contacts listed must be associated with the Grantee company.

6. **If completing the LOA as a Grantor**: Specify an **Effective** and **Expiration Date**. The Effective Date cannot be a date in the past. The LOA shall remain in effect for a maximum of three (3) years from the specified date. Revalidation of authorization is required every 12 months from the authorization date until the LOA expiration. Either party may terminate this LOA at any time by giving written notice to the other party and Railinc.

7. When ready, select **Continue or the Grantor tab indicator at the top of the page**. The Create LOA (Grantor tab) is displayed (Exhibit 18) when Grantee was initially selected. The Create LOA (Grantor tab) is displayed (Exhibit 19) when Grantor was initially selected.

**Exhibit 18. Create LOA (Grantor tab when Grantee is selected)**
8. Complete the available input fields. A **Primary Contact** is mandatory and the associated email address cannot be a distribution list. It must be a specific individual. The Secondary and Third Contact inputs are optional, but be aware that all contacts listed on an LOA have the ability to approve/reject the LOA. All contacts listed must also be associated with the Grantor company.

9. **Limit LOA by Company or Mark**: This option is only available for Tracing LOAs, no other categories. In Tracing LOAs, enter the Company field for this option to appear. To limit the scope of the LOA, click the checkbox to see all available marks including the parent, child and holding children and their marks. Click to select the appropriate marks. Typically, limits are made by company/mark or equipment, but on occasion it may be appropriate to use both.

10. **Limit LOA by Equipment (Tracing Only)**: Enter the Company field for this option to appear. To limit the scope of the LOA, enter the appropriate equipment ids individually or in a range. Once equipment id’s are entered, click **Validate** or **Validate & Delete invalid equipment**. Valid equipment is equipment that is registered in Umler for the selected company. **Validate** provides a message of the outcome at the top of the screen and **Validate & Delete** removes ids that are not found in Umler. Typically, limits are made by company/mark or equipment, but on occasion it may be appropriate to use both.
11. **If completing the LOA as a Grantee:** Specify an **Effective** and **Expiration Date.** The Effective Date cannot be a date in the past. The LOA shall be effective beginning on the date below and shall remain in effect for a maximum of three (3) years from the specified date. Revalidation of authorization is required every 12 months from the authorization date until the LOA expiration. Either party may terminate this LOA at any time by giving written notice to the other party and Railinc.

12. When ready, select **Continue or the Add Categories tab indicator at the top of the page.** The Create LOA (Add Categories tab) is displayed (**Exhibit 20**).

**Exhibit 20. Create LOA (Add Categories tab)**

13. **Exhibit 20** shows all categories collapsed. Use the sub-category drop-down next to the desired category to display its details. **Exhibit 21** shows an example of an expanded category for Equipment Health.
Exhibit 21. Sub-Category Selection for Equipment Health

14. Select all the appropriate subcategories associated with the LOA. Exhibit 22 shows all categories and entries expanded. The individual entries are subject to change. See Appendix A—Category Descriptions for details.
Exhibit 22. Categories and Subcategories (subject to change)

ASSET UTILIZATION
- Car Accounting Self Service (CASS)
- Car Accounting Self Service Query
- CASS LAM Creation

Car Hire Data Exchange
- Car Hire Data Exchange (CHDX) Send
- Car Hire Data Exchange (CHDX) Receive

Car Hire Liability File
- Car Hire Liability File (CHLF) Payables and Receivables
- Car Hire Liability File (CHLF) Receivables
- Car Hire Liability File (CHLF) Payables

Deprescription Bid & Offer
- Deprescription Bid & Offer System Receivables
- Deprescription Bid & Offer System Payables

Transfer of Liability
- TRAIN29
- TRAIN28 CPY30
- TRAIN28 1-3
- TRAIN28 CPY10
- TRAIN28 CPY20
- TRAIN26
- TRAIN38 6-8

Car Hire Accounting Rate Master
- Car Hire Accounting Rate Master (CHARM) Receivables
- Car Hire Accounting Rate Master (CHARM) Payables

LCS
- SWADM52
- TRAIN69ALL 40
- TR69ONH
- TR69CHG 50
- TR69CHG 20
- TRAIN69ALL 20
- TRAIN62
- TRAIN69ALL 10
- TR69CHG 40
- TR69HOM 10
- TR69HOM 50
- TR69HOM 40
- TR69HOM 30
- TRAIN61
- TR69HOM 20
- TRAIN69ALL 50
- TR69CHG 10
- TRAIN69ALL 30
- TR69CHG 30

Tank Car Mileage Equalization
- Tank Car Mileage Equalization Invoices
- Tank Car Mileage Equalization Reports

RATE EDI NETWORK (REN)
- Rate EDI Network (REN) Access
- REN Web

EQUIPMENT REPAIR
- Car Repair Billing Data Exchange
  - Submit and Receive
  - Receive Data Only
  - Submit Data Only

Billing Repair Card
- Billing Repair Card

RAIL INDUSTRY CONTACT INFORMATION - FINDUS.RAIL
- Rail Industry Contact Information – FindUs.Rail
  - FindUs.Rail Website Access

TRACING
- Tracing
  - Car Location Message (CLM)
  - Waybill(417)
  - Hazmat Waybill

UMLER
- UMLER
  - Equipment Registry Website Access
  - Web Services
  - Component Registry Website Access
  - TRAIN II Equipment Updates

EQUIPMENT HEALTH
- EHMS
  - EHMS Notifications
  - EHMS Website Access
  - EHV Fleet Stats

DDCTS
- Interchange Bureau User Website
- DDCT Web Service User Id
- DDCTS Shop Website Access
- DDCTS Car Owner Website Access
- DDCTS Handling Carrier Website Access

EQR
- EQR Web Service User Id
- EQR Car Mark Owner Website Access
- EQR Handling Carrier Website Access

EHMS/Repair Service
- EHMS Web Service User Id

Mechanical Reference Repository
- MRR Car MARK Owner Website Access
- MRR Running Repair Sponsor Website Access

GENERAL MESSAGE SETUP
- TRAIN Messaging
  - TRAIN58
  - EDACK51
  - Flip Flop Table
  - TRAIN50
  - TRAIN51
  - TRAIN53

Forward & Store
- Waybill Submissions and Receipt (SW417 or SWAYB)

General Messaging
- Message Switching

ISS - INTERLINE SETTLEMENT SYSTEM
- ISS – Interline Settlement System
  - Interline Settlement System

EARLY WARNING/MAINTENANCE ADVISORY (EW/MA) SYSTEM
- Early Warning/Maintenance Advisory (EW/MA) System
  - Report Inspections via Web Services
  - Early Warning Website Access

LOADING AUTHORITY
- Shipper Loading Authority (Circular OT-5)
  - Shipper Loading Authority (Circular OT-5) - Reviewer
  - Shipper Loading Authority (Circular OT-5) - Submitter
  - Shipper Loading Authority (Circular OT-5) - Approver

SWITCH SETTLEMENT DATA EXCHANGE
- Switch Settlement Data Exchange
  - SSDX Send
  - SSDX Receive
15. When ready, select **Continue or the Set up Categories tab** indicator at the top of the page. The Create LOA (Set Up Categories tab) is displayed ([Exhibit 23](#exhibit23)).

**Exhibit 23. Create LOA (Set Up Categories tab)**

16. At the top of the page, the **Set Up Categories** section allows you to enter or look up **Marks** and **SSO IDs** which can then be subsequently applied to all the categories selected on the previous step.

   a. When the **Select** button for **Mark** is selected, the **Marks Selection** look up is displayed ([Exhibit 24](#exhibit24)) allowing you to choose available marks. Selecting **Apply to All** applies all available marks.

   **Exhibit 24. Marks Selection Look Up**

   ![Marks Selection](#marks)

   b. When the **Search** button for **SSO** is selected, the **Users Selection** look up is displayed ([Exhibit 25](#exhibit25)) allowing you to search for SSO IDs. The drop down field on the look up allows you to search by email, user id, first or last name.

   **Exhibit 25. Users Selection Look Up**

   ![Users Selection](#users)
17. If you wanted to apply a found or entered Mark or SSO ID to all categories selected on the previous step, select the **Apply to All** button that corresponds with either Mark or SSO ID. **Exhibit 26** demonstrates the apply feature for a found Mark.

**Exhibit 26. Set Up Categories with Mark applied to all**

18. Once either a Mark or an SSO ID has been assigned to each selected category, as necessary, use the **Back** button or the other LOA tabs to review all entered information for accuracy. When ready to proceed, select **Submit**. A message appears at the top of the page stating that the LOA has been submitted (**Exhibit 27**). An automatic email is sent to the involved parties for approval and notification of the LOA submission.
19. As needed, select **Clone LOA** to create a new LOA that replicates elements of the one displayed (see **Cloning LOAs**).
Search LOA

When the user selects the Search LOA menu item, the Search for Letter of Authorization page is displayed (Exhibit 28).

Exhibit 28. Search for Letter of Authorization

Search criteria include:

Category: Show LOAs for the selected Category only (single selection drop-down). Default is All.

Effective From/To dates: Period when the LOA became effective. When one date is entered, the other field defaults to the same date. Adjust period as necessary. Default is blank.

Expiration From/To dates: Period when the LOAs expire. When one date is entered, the other field defaults to the same date. Adjust period as necessary. Default is blank.

Status: Choose a value from the drop down. Valid values include:

- All (all selected as default)
- 2nd Party Approved
- 2nd Party Rejected
- Approved
- Canceled
- Cancellation Requested
- Draft
- Edited
- Expired
- Rejected
- Revalidate
- Submitted

Mark: The Mark for either the Grantor or the Grantee.

Grantor: The name of the company of the Grantor.

Grantee: The name of the company of the Grantee.

To clear the criteria, select Reset. When criteria have been set, select Search to view the results.
Viewing Search Results

The Search Results table has several controls for navigation.

Exhibit 29. LOA Search Results

When viewing search results:

- Use the numbered page tabs on the bottom left to move between multiple pages of search results. The left and right arrow can also be used to search one page at a time.

- Choose to view 20, 50 or 100 entries at a time by selecting the 20, 50 or 100 count links at the bottom right of the page.

- Select the LOA ID link in the first column to open the LOA. Displayed results vary based on the LOA status.
Viewing Documents

Existing LOAs can have documents attached. To view the document attached to an LOA:

1. Select the icon link in the PDF column of the row. The document is displayed in a new browser window (Exhibit 30).

Exhibit 30. Attached PDF Document Window

To print the document, select the Acrobat print icon (or press Ctrl + P), and send to local printer.

2. When finished viewing the document, close the browser window.
Viewing Approved LOAs

Additional action buttons are available for displayed LOAs in Approved status. Approved LOAs can be viewed as a PDF from the My LOAs page.

1. Select the LOA ID link of an LOA with Approved status on the Search Results page (Exhibit 29). Select the LOA ID link at the left to open the View LOA panel (Exhibit 31).

Exhibit 31. View of Approved LOA with Limit

2. Choose an action as shown in Exhibit 32.

Exhibit 32. Actions for Approved LOAs

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clone LOA</td>
<td>Creates a clone of the displayed LOA. Refer to Cloning LOAs.</td>
</tr>
<tr>
<td>Revoke</td>
<td>Cancels the implemented LOA (reason text must be added). See Revoking LOAs.</td>
</tr>
</tbody>
</table>
Managing LOAs

Approving/Rejecting LOAs

Once an LOA has been submitted, it must then be reviewed and either approved or rejected by the Grantor and Railinc. The Grantor will receive an email notification regarding the LOA request. Review the email and either approve or reject the request.

When a **Renewed** LOA is created and submitted from an **Approved** LOA, the original Approved LOA can no longer be edited, and when the Renewed LOA is approved, the original Approved LOA automatically expires (and can no longer be edited). See Renewing LOAs.

Revoking LOAs

When an LOA is either pending or approved, it can be revoked. To revoke an LOA:

1. Conduct a search for the LOA to be revoked. See **Search LOA** for instructions. Approved LOAs can also be accessed from the **Approved** tab on the My LOAs page and pending LOAs can be accessed from the **Submitted** tab (see **My LOAs**).

2. From the displayed results, select the LOA ID link for the LOA. The View LOA page is displayed (**Exhibit 33**).

**Exhibit 33. View of LOA with Clone and Revoke options**

3. Select the **Revoke LOA** button. A message appears stating that the LOA has been revoked. An email is sent to the involved parties.
Editing LOAs

To edit an LOA:

1. Conduct a search for the LOA to be edited. See Search LOA for instructions. LOAs can also be accessed from the tabs on the My LOAs page (see My LOAs).

2. Select the LOA ID link for the displayed LOA to be edited. The View LOA page is displayed.

3. Select the Edit button. The Edit Categories tab for the LOA opens (Exhibit 34).

4. Select the categories to be edited. Add or remove permissions, as desired.

5. Click Continue. The Set Up Categories tab for the LOA opens (Exhibit 35).
20. Review changes made. When ready to proceed, select Submit. A message appears at the top of the page stating that the LOA has been submitted. An automatic email is sent to the involved parties as a notification of the LOA revisions.

Cloning LOAs

The LOA application allows you to clone existing LOAs. This is helpful and saves time if characteristics in an existing LOA are similar to what is needed in a new LOA.

To clone an existing LOA:

1. Conduct a search for the LOA to be cloned. See Search LOA for instructions. LOAs can also be accessed from the tabs on the My LOAs page (see My LOAs).

2. Select Clone LOA. The LOA fields open for modification.

3. Complete the cloned LOA in the same way as creating a new LOA (see Create LOA).
Revalidating LOAs

LOAs are by default good for three years; however, after each one-year period (and after at least 365 days), the LOA must be revalidated by the Grantor to continue for the full three years. The system sends the Grantor a notice to revalidate the LOA AT 45, 30, 14, 7 and 1 day(s) prior to the revalidation date.

Upon receipt of a system e-mail requiring validation of an LOA:

1. When an LOA needs to be revalidated, an email is sent to the Grantor (Exhibit 36).

Exhibit 36. Revalidation E-Mail to Grantor with Application Link

![Revalidation E-Mail to Grantor with Application Link]

2. Select the link in the email in order to initiate the revalidation process.

See Renewing LOAs to learn how to renew a Revalidate LOA. When a Renewed LOA is created and submitted from a Revalidate LOA, the original Revalidate LOA can no longer be edited, and when the Renewed LOA is approved, the original Revalidate LOA automatically expires (and can no longer be edited). See Renewing LOAs.
Expiring LOAs

When LOAs near their expiration date, the system sends the Grantee a notice to submit a new LOA at 45, 30, 14, 7 and 1 day(s) prior to the expiration date. If the Grantee and Grantor are no longer doing business with each other, then emails can be ignored. However, if the relationship continues past the LOA expiration date, a new LOA must be submitted within 15 days of the expiration date of the prior LOA to prevent access from being removed.

Once an LOA expires, it can no longer be edited, but expired LOAs can be renewed. See Renewing LOAs to learn how to renew an expired LOA.

Renewing LOAs

When an LOA has expired, the LOA application provides a way to automatically copy and replace an existing LOAs with the status of Expired, Revalidate and Approved using the renew option. A renewed LOA is a replacement of the original LOA. This means that the renewed LOA will be given a new LOA ID and certain fields cannot be changed including Grantee, Grantor and Categories. The Effective Date can change and cannot be in the past. If these are fields that you want to update, consider using the Clone option instead (see Cloning LOAs).

Once a renewed LOA is submitted, the original LOA can no longer be updated. When the renewed LOA is approved, the original LOA automatically expires (see Expiring LOAs).

To use the renew option:

1. Open an expired, revalidate or approved LOA. At the top of the LOA is the option to Clone or Renew an LOA.

Exhibit 37. Renew LOA Button

2. Click the Renew LOA button.

In some cases, an LOA can’t be renewed because it contains invalid data. When this happens, you’ll see a red message at the top of the LOA after clicking the Renew LOA button. Some of the reasons for invalid data include Grantee or Grantor information is not up-to-date, mark hierarchy has changed, equipment is invalid and/or category has changed.

3. In a renewed LOA, the Grantee Information cannot be updated. The Grantee Contacts are editable - make any appropriate changes. If there are no errors, click Continue.

4. The Grantor Information cannot be updated. The Grantor Contacts and Effective/Expiration Dates are editable - make any appropriate changes. The dates cannot be in the past. Click Continue.
5. **Selected Categories** cannot be updated. Click **Submit** to submit the LOA (or **Back** to make changes to the dates or contacts or **Cancel** to cancel the LOA).

6. When the LOA is successfully submitted, a green message appears at the top with the number of the (new) LOA. The LOA goes through the same approval process and when the renewal has been successfully approved by the other party and Railinc, the original (revalidate or approved) LOA automatically expires.

   **Exhibit 38. LOA Submitted**

![Exhibit 38. LOA Submitted](image)

7. Upon approval, you’ll receive an email that the renewed LOA is a replacement for the original LOA.

   **Exhibit 39. LOA Email Notification**

   ![Exhibit 39. LOA Email Notification](image)
LOA Templates

The LOA application allows you to create templates. These are helpful and save time if characteristics are similar for multiple LOAs. When the user selects the LOA Templates menu item, the LOA Templates page is displayed (Exhibit 40).

Exhibit 40. LOA Templates

Here is an overview of actions possible from this page:

- **View Template**: Select the hyperlinked name of a listed LOA template to view its details. The other actions described here are also available once an individual LOA is displayed.

- **Add LOA Template**: Select the Add LOA Template button to start the process of adding a new template.

Other actions are available through the LOA Templates Action Menu (Exhibit 41).

Exhibit 41. LOA Templates Action Menu

- **Apply Template**: Allows you to apply a template towards the creation of an LOA. This means that most of the fields in the LOA will be pre-populated with the template inputs.

- **Edit Template**: Allow you to make edits to an existing template.

- **Clone Template**: Allows you to create a copy of an existing template.

- **Delete Template**: Select this option to delete the corresponding LOA template.
View Template

To view the details of an existing template:

1. Select the LOA Templates menu item. The LOA Templates page is displayed (Exhibit 40).

2. Select the template name hyperlink of the template that you want to view (see Exhibit 42 in which “aar test” would be selected).

Exhibit 42. Template Name Hyperlink (to view an LOA template)

3. Once the template name is selected, the View LOA Template page is displayed (Exhibit 43).

Exhibit 43. View LOA Template

4. As needed, perform one of the actions available:
   a. Select Apply Template to have the displayed template applied to an LOA (see Apply Template).
   b. Select Edit Template to open the displayed template up to changes (see Edit Template).
   c. Select Clone Template to initiate the process of creating a copy of the displayed template (see Clone Template).
   d. Select Delete Template to delete the displayed template. A confirmation message appears asking you to confirm your decision to delete the displayed template. Select Yes to proceed with deleting the displayed LOA.
Add LOA Template

To create a new template:

1. Select the LOA Templates menu item. The LOA Templates page is displayed (Exhibit 40).
2. Select the Add LOA Template button. The Are you a Grantee or Grantor popup is displayed (Exhibit 44).

Exhibit 44. Grantee or Grantor Popup (for LOA Templates)

3. Follow the steps in Creating an LOA starting at step 3.
4. At the end of the process, select Save Template. The LOA Templates page (Exhibit 40) is redisplayed with the new template added.

Apply Template

Note: Templates can be applied as a first step in the regular LOA creation process. This requires selecting the “Use Template” option in the Grantee or Grantor Pop up during the first step in the create LOA process. See Create LOA and Exhibit 13 for details.

To apply a template from the LOA Templates page:

1. Select the LOA Templates menu item. The LOA Templates page is displayed (Exhibit 40).
2. Select the Apply Template option (Exhibit 45) that appears by default under the Actions heading for the template that matches the LOA.

Exhibit 45. Apply Template Action

3. Once Apply Template has been selected the Create LOA process is initiated with the fields from the template pre-filled.
4. Complete the process in the same way as a new LOA (see Creating an LOA).
**Edit Template**

To edit an existing LOA template:

1. Select the LOA Templates menu item. The LOA Templates page is displayed (Exhibit 40).
2. Select the **Edit Template** option on the LOA Templates Action menu (Exhibit 41) for the listed LOA template that you want to edit. The LOA Template opens allowing you to make updates to the input fields (Exhibit 46).

**Exhibit 46. Edit LOA Template**

3. Make any needed updates. Navigate to other sections of the template by using the **Continue** button. As needed, move back to previous displayed sections of the LOA by using the **Back** button.
4. When finished making updates, select the **Save Template** button to save the revised template.

**Clone Template**

To clone (copy) an existing LOA template:

1. Select the LOA Templates menu item. The LOA Templates page is displayed (Exhibit 40).
2. Select the **Clone Template** option on the LOA Templates Action menu (Exhibit 41) for the listed LOA template that you want to clone. The LOA Template opens carrying over the input fields from the selected template allowing you to make updates to the input fields. Entering the LOA Template **Name Field** is mandatory (Exhibit 47). The cloned LOA must have a new, unique name.

**Exhibit 47. LOA Template Name Field**

3. Complete all input fields and select **Save Template** to save the cloned template.
# Appendix A—Category Descriptions

## SubCategory | Description or Usage
--- | ---
### ASSET UTILIZATION
#### Car Accounting Self Service (CASS)
- **Car Accounting Self Service Query:** This allows users to query events in the Car Accounting Self Service System.
- **CASS LAM Creation:** This allows creation of Liability Acceptance Messages only.

#### Car Hire Data Exchange (CHDX)
- **Car Hire Data Exchange (CHDX) Send:** Must be received prior to the scheduled monthly run. CHDX supports the periodic (post-operation) exchange of information to clarify payables and receivables. This is a monthly exchange of time and mileage payment information.
- **Car Hire Data Exchange (CHDX) Receive:** Must be received prior to the scheduled monthly run. CHDX supports the periodic (post-operation) exchange of information to clarify payables and receivables. This is a monthly exchange of time and mileage payment information.

#### Car Hire Liability File (CHLF)
- **Car Hire Liability File (CHLF) Payables and Receivables**
- **Car Hire Liability File (CHLF) Receivables**
- **Car Hire Liability File (CHLF) Payables**

#### Deprescription Bid & Offer
- **Depre Market Reports:** Depre Market Reports
- **Deprescription Bid and Offer System Receivables:** Process used by railroads to negotiate car hire rates for the use of equipment.
- **Deprescription Bid and Offer System Payables:** Process used by railroads to negotiate car hire rates for the use of equipment.

#### Transfer of Liability
- **TRAIN29:** TRAIN29 Option has not relevance. The Delinquent Carrier may respond with a TRAIN10/08 report Type 89 message indicating denial of the Rule 15 TOL. If so, the TOL will not be posted to the Event Repository and a TRAIN29 message will be sent to the Holding Road indicating the denial of the TOL. Car Hire responsibility remains with the Holding Carrier until actual interchange is accomplished.
- **TRAIN28 CPY30:** If a carrier is setup to receive their own TRAIN28 message a copy of the TR28CPY can be set up to send to an additional receiver Option 30 = Will send a copy if From-road has authorized
- **TRAIN28 1-3:** Data provided as requested in the TRAIN08, Transfer of Liability Message. If Delinquent Carrier indicating acceptance by TRAIN10/08 then Railinc will send a TRAIN28 to Holding Road, Delinquent Carrier and Equipment owner. Option 1 Rule 5 To-Road (Railroad acting as a switch carrier) Option 2 Rule 5 Owner Cars (Railroad acting as a switch carrier) Option 3 Rule 5 From Road (Railroad acting as a switch carrier)
- **TRAIN28 CPY10:** If a carrier is setup to receive their own TRAIN28 message a copy of the TR28CPY can be set up to send to an additional receiver Option 10 = Will send a copy if Owner has authorized
- **TRAIN28 CPY20:** If a carrier is setup to receive their own TRAIN28 message a copy of the TR28CPY can be set up to send to an additional receiver Option 20 = Will send a copy if To-Road has authorized
- **TRAIN26
- **TRAIN38 6-8:** Data provided as requested in the TRAIN08, Transfer of Liability Message. If Delinquent Carrier indicating acceptance by TRAIN10/08 then Railinc will send a TRAIN28 to Holding Road, Delinquent Carrier and Equipment owner. Option 6 Rule 15 To-Road (Railroad acting as a line-haul carrier) Option 7 Rule 15 Owner cars (Railroad acting as a line-haul carrier) Option 8 Rule 15 From Road (Railroad acting as a line-haul carrier)
## Appendix A—Category Descriptions

<table>
<thead>
<tr>
<th>SubCategory</th>
<th>Description or Usage</th>
</tr>
</thead>
</table>
| **Car Hire Accounting Rate Master** | Car Hire Accounting Rate Master (CHARM) Receivables: Must be received prior to the 1st of each month. Requires 5 business days for setup CHARM helps users manage and understand the costs of rail car use and repair. CHARM is the official source of time and mileage rates on freight cars.  
Car Hire Accounting Rate Master (CHARM) Payables: Must be received prior to the 1st of each month. Requires 5 business days for setup CHARM helps users manage and understand the costs of rail car use and repair. CHARM is the official source of time and mileage rates on freight cars. |

| LCS | SWADM52: LCS message which will have the summary (count) of the all the LCS messages sent out for each Mark  
TRAIN69ALL 40: Receive all messages from LCS for chosen option number Option 40 = Trailers  
TR69ONH: Responsible road at the end of previous month  
TR69CHG 50  
TR69CHG 20  
TRAIN69ALL 20: Receive all messages from LCS for chosen option number Option 20 = Railroad Owned Equipment  
TRAIN62: Reports sent to the assignee of a reporting mark or appointed agent when the Interchange delivery or receipt does not involve the assignee, the reporting time limit of 120 hours has expired, or when additional conditions are met. Format option 2 contains a separate Group Level reports for each equipment.  
TRAIN69ALL 10: Receive all messages from LCS for chosen option number Option 10 = All equipment  
TR69CHG 40  
TR69HOM 10: If interchange has been reported and only on the home road Option 10 = All equipment  
TR69HOM 50: If interchange has been reported and only on the home road Option 50 = Containers  
TR69HOM 40: If interchange has been reported and only on the home road Option 40 = Trailers  
TR69HOM 30: If interchange has been reported and only on the home road Option 30 = Private Equipment  
TRAIN61: Reports sent to the assignee of a reporting mark (or an appointed agent) when Interchange delivery or receipt does not involve the assignee, the reporting time limit of 120 hours has expired, or when additional conditions are met. Format option 1 contains a separate Group Level record for each interchange followed by Detail Level records for each equipment unit that was involved in the interchange.  
TR69HOM 20: If interchange has been reported and only on the home road Option 20 = Railroad Owned Equipment  
TRAIN69ALL 50: Receives only changes from LCS for chosen option number Option 50 = Containers  
TR69CHG 10  
TRAIN69ALL 30: Receives only changes from LCS for chosen option numberOption 30 = Private Equipment  
TR69CHG 30 |
| **Tank Car Mileage Equalization** | Tank Car Mileage Equalization Invoices:  
Tank Car Mileage Equalization Reports: Tariff RIC-6007 Item 187, Mileage Allowance on Cars of Private Ownership |
| **Rate EDI Network (REN)** | Rate EDI Network (REN) Access  
REN Web |
# Appendix A—Category Descriptions

<table>
<thead>
<tr>
<th>SubCategory</th>
<th>Description or Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EQUIPMENT REPAIR</strong></td>
<td></td>
</tr>
</tbody>
</table>
| Car Repair Billing Data Exchange | Submit and Receive: This is an Agent mark that is authorized to Submit and Receive on behalf of Road marks  
Receive Data Only: This is an Agent mark that is authorized to Receive on behalf of Road marks  
Submit Data Only: This is an Agent mark that is authorized to submit on behalf of Road marks |
| Billing Repair Card | Billing Repair Card |
| **RAIL INDUSTRY CONTACT INFORMATION - FINDUS.RAIL** | |
| Rail Industry Contact Information – FindUs.Rail | Rail Industry Contact Information – FindUs.Rail: FindUs.Rail Website Access |
| **TRACING** | |
| Tracing | Car Location Message (CLM): Taken from events reported to Railinc by railroads throughout North America, these messages help shippers, consignees, equipment owners, lessees, and logistics firms track and manage their equipment on the rail.  
Waybill (417): Used to provide the rail carrier with detailed movement instructions pertinent to a rail carrier shipment and is used by all Class I rail carriers in the United States and Canada.  
Hazmat Waybill |
| **UMLER** | |
| UMLER | Equipment Registry Website Access  
Web Services  
Component Registry Website Access  
TRAIN II Equipment Updates |
| **EQUIPMENT HEALTH** | |
| EHMS | EHMS Notifications: EHMS Notifications/Subscriptions option allows subscribers to receive data related to open and closed alerts. This is utilized mostly by customer systems and is a flat file format. Refer to Railinc's Price List for additional fees associated with this service option.  
EHMS Website Access: EHMS website access to view the condition of railroad equipment pertaining to open and closed alerts from detector information.  
EHV Fleet Stats: EHV Fleet Stats permission allows users to view fleet related data pertaining to health related items such as EHMS alerts, Umler inspections, etc. This permission is required to view specific fleet data. |
| DDCTS | Interchange Bureau User Website  
DDCT Web Service User Id: DDCT webservices utilizes XML schemas to send requests and receive DDCT related data to participating users. This is a system to system communication method. Refer to Railinc's Price List for additional fees associated with this service option.  
DDCTS Shop Website Access: DDCT website access that allows Shop to view cars expected at shop, report repairs and view repair history for damaged and defective cars per AAR Interchange Rules.  
DDCTS Car Owner Website Access: DDCT website access that allows Car Mark Owner (CMO) to provide disposition, report repairs or complete Settlement Value Worksheet for damaged and defective cars per AAR Interchange Rules  
DDCTS Handling Carrier Website Access: DDCT website access that allows railroads, car owners and repair shops to track, identify and report repairs for damaged and defective cars per AAR Interchange Rules |
## Appendix A—Category Descriptions

<table>
<thead>
<tr>
<th>SubCategory</th>
<th>Description or Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>EQR</td>
<td>EQR Web Service User Id</td>
</tr>
<tr>
<td></td>
<td>EQR Car Mark Owner Website Access</td>
</tr>
<tr>
<td></td>
<td>EQR Handling Carrier Website Access</td>
</tr>
<tr>
<td>EHMS/Repair Service</td>
<td>EHMS Web Service User Id</td>
</tr>
<tr>
<td>Mechanical Reference Repository</td>
<td>MRR Car MARK Owner Website Access</td>
</tr>
<tr>
<td></td>
<td>MRR Running Repair Sponsor Website Access</td>
</tr>
<tr>
<td></td>
<td><strong>GENERAL MESSAGE SETUP</strong></td>
</tr>
<tr>
<td></td>
<td>TRAIN Messaging</td>
</tr>
<tr>
<td></td>
<td><strong>TRAIN58</strong>: Is sent to the road from Railinc and identifies the violations of edit criteria found in the Group Level or Detail Level records of the referenced TRAIN08 Car Movement Report</td>
</tr>
<tr>
<td></td>
<td><strong>EDACK51</strong>: Informs transmission of road of message receipt (regardless of type) and may contain exception detected in the Summary record and/or Message Trailer record by the TRAIN II Edit process for TRAIN II input messages.</td>
</tr>
<tr>
<td></td>
<td><strong>Flip Flop Table</strong>: Railinc internal table used for railroads that use agents to send messages on their behalf.</td>
</tr>
<tr>
<td></td>
<td><strong>TRAIN50</strong>: Identifies violations of edit criteria found in the Group and Detail Level records at an Event Report (TRAIN10)</td>
</tr>
<tr>
<td></td>
<td><strong>TRAIN51</strong>: Identifies violations of edit criteria found in the Group and Detail Level records of an Interchange Report (TRAIN01/31).</td>
</tr>
<tr>
<td></td>
<td><strong>TRAIN53</strong>: Identifies violations of edit criteria found in the Group and Detail Level records of an Interchange Report (TRAIN03/33).</td>
</tr>
<tr>
<td></td>
<td>Forward &amp; Store</td>
</tr>
<tr>
<td></td>
<td>Waybill Submissions and Receipt (SW417 or SWAYB)</td>
</tr>
<tr>
<td></td>
<td>General Messaging</td>
</tr>
<tr>
<td></td>
<td>Message Switching: Used to configure new Trading Partner IDs for Railinc's Message Switching Service</td>
</tr>
<tr>
<td></td>
<td><strong>ISS - INTERLINE SETTLEMENT SYSTEM</strong></td>
</tr>
<tr>
<td></td>
<td>ISS – Interline Settlement System: Authorization for a third party provider to take over as the agent or software provider for an ISS participant</td>
</tr>
<tr>
<td></td>
<td><strong>EARLY WARNING/MAINTENANCE ADVISORY (EW/MA) SYSTEM</strong></td>
</tr>
<tr>
<td></td>
<td>Early Warning/Maintenance Advisory (EW/MA) System</td>
</tr>
<tr>
<td></td>
<td>Report Inspections via Web Services</td>
</tr>
<tr>
<td></td>
<td>Early Warning Website Access</td>
</tr>
<tr>
<td></td>
<td><strong>LOADING AUTHORITY</strong></td>
</tr>
<tr>
<td></td>
<td>Shipper Loading Authority (Circular OT-5) - Reviewer</td>
</tr>
<tr>
<td></td>
<td>Shipper Loading Authority (Circular OT-5) - Submitter</td>
</tr>
<tr>
<td></td>
<td>Shipper Loading Authority (Circular OT-5) - Approver</td>
</tr>
<tr>
<td></td>
<td><strong>SWITCH SETTLEMENT DATA EXCHANGE</strong></td>
</tr>
<tr>
<td></td>
<td>Switch Settlement Data Exchange</td>
</tr>
<tr>
<td></td>
<td>SSDX Send</td>
</tr>
<tr>
<td></td>
<td>SSDX Receive</td>
</tr>
</tbody>
</table>
### Index

3PL, 1  
actions  
   pending LOA, 23  
application title, 4  
approved LOA  
   actions, 23  
   revoke, 24  
   view, 23  
area  
   content, 5  
Category section  
   create, 14  
Contact Us link, 5  
contacting Railinc, 3  
content area, 5  
criteria for search, 20  
Customer Success Center, 3  
document  
   close, 22  
   print, 22  
   view, 22  
draft LOA  
   edit, 25  
edit  
   draft LOA, 25  
e-mail  
   revalidation to Grantee, 27, 28  
executables area, 5  
grantee menu, 6  
icon  
   document link, 22  
Launch Pad link, 4  
letter of authorization. See LOA link  
   Contact Us, 5  
   Launch Pad, 4  
   LOA ID, 21  
   navigational, 4  
   Sign Out, 5  
LOA  
   application menu, 6  
   edit, 25  
   log in, 6  
   log out, 6  
   overview, 1  
   revalidate, 27, 28  
   revoke, 24  
search, 20  
SSO permissions, 3  
templates, 30  
LOA ID  
   link, 21  
log in, 6  
log out, 6  
logo, Railinc, 4  
menu  
   grantee, 6  
   LOA, 6  
   Main, 5  
message  
   type descriptions, 34  
navigational link, 4  
Railinc logo, 4  
Railinc, contacting the Customer Success Center, 3  
revalidate LOA  
   Grantee e-mail, 27, 28  
   overview, 27, 28  
   revoke  
   LOA, 24  
search  
   criteria, 20  
   LOA, 20  
   Reset, 20  
Sign Out link, 5  
Sign-On Information, 4  
Single Sign On, 2  
SSO  
   LOA permissions, 3  
   registration, 2  
status  
   search criteria, 20  
templates  
   LOA, 30  
Third-party logistics provider, 1  
title  
   page, 5  
title (application), 4  
view  
   approved LOA, 23  
   document, 22  
web interface  
   page layout, 4