Interline Service Agreement (ISA) Repository User Guide

RAILINC

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Learning about the ISA Repository

The ISA Repository is a web-based application that makes it easy for parties involved in an Interline Service Agreement (ISA) to ensure that they are working with the most current version of the agreement. The ISA Repository application enables users to create ISAs, which are then distributed via email for review and approval.

This document describes how to use the ISA Repository through the following major sections:

- [Learning about the ISA Repository](#) provides basic information about the system.

- [Getting Started](#) describes how to access and log into the system.

- [Creating ISAs](#) describes how to create Interline Service Agreements.

- [Working with Contacts](#) describes how to create and manage contacts used for ISAs.

- [Working with ISA Emails](#) describes the ISA emails that are sent by the application.

- [Working with Existing ISAs](#) describes how to view and clone existing Interline Service Agreements and edit their associated contacts, as well as how to edit and archive draft ISAs.

- [Exporting ISAs](#) describes how export an ISA as a CSV file.

- [Viewing Documentation](#) describes how to download and view the latest version of this user guide as well as other helpful files.

An index follows the major sections.

Overview

Managing interchange activities is a challenging and complex task. The ISA Repository is an easy-to-use, web-based application that enables any railroad to enter into an interchange agreement with a partner railroad. The repository stores critical details about the railroads' interchange activities, including frequency, times, length of train, and interchange locations, helping to ensure that an interchange event occurs as planned.

The ISA Repository helps railroads in and around major rail gateways operate more effectively by improving their planning and communication with their partners and by providing convenient access to essential information about their interchange agreements.

With its simple user interface, the ISA Repository makes it easy for railroads to create, approve, and archive ISAs. The application enables railroads of all sizes to initiate an ISA. Partner railroads can approve or reject an ISA with just an email – they are not required to log into the application. The application's cloning feature creates new ISAs that mirror existing ISAs, and current and historical ISAs are always available via PDF and CSV downloads.

With the ISA Repository, railroads know their interchange partners have reviewed and approved the details of their ISA. This lessens the likelihood of expensive errors like a partner railroad ending up with more railcars than it can handle or with the right number of railcars at the wrong time.

Railroads with access to the ISA Repository can view and download ISAs of which they are a party at any time, without assistance from Railinc or their partner railroads. Current and historical ISAs are always available via PDF and CSV downloads, and a railroad that initiates an ISA has the ability to edit it.

The ISA Repository generates a reminder email notification seven days after the initiating railroad requests approval of an ISA from its partner railroad. If the partner railroad does not approve the ISA within 30 days, the application automatically accepts it and sends a notice to both parties. This prevents ISAs from idling in the system indefinitely and an initiating railroad from operating under the assumption that its partner railroad has viewed and approved the ISA.

The ISA Repository is particularly helpful in improving the management of gateways by ensuring that each railroad is working with the most current versions of their Interline Service Agreements.

System Requirements

For information about the system requirements of Railinc web applications and for information about downloading compatible web browsers and file viewers, refer to the *Railinc UI Dictionary*.

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.

Getting Started

Access the ISA Repository by using Railinc Single Sign-On (SSO), a web application that provides convenient access to a variety of Railinc products. To get started, go to the Railinc portal at https://public.railinc.com. Select the **Customer Login** link in the top right corner of the website to open the Login page. Log into SSO by entering your user ID and password in the fields and then selecting **Sign In**.

1. If you do not already have a Railinc SSO user ID and password, refer to the *Railinc Single Sign-On User Guide*. Once you have access to Railinc SSO, you must request access to the ISA Repository within SSO.

2. If you do not have access to the ISA Repository, request access by following instructions in the *Railinc Single Sign-On User Guide*. See Learning about User Roles for information about the available levels of access. When you have received e-mail notification confirming your access to the ISA Repository, you can log on and begin using the system.

3. It is not necessary to have an SSO ID in order to approve or reject emailed ISAs.

Learning about User Roles

Your assigned user role determines what functions you can perform. User roles are assigned by Railinc through the Single Sign-On interface (refer to the *Railinc Single Sign-On User Guide*).

The following role is applicable for railroad service design personnel:

- **ISA Creator** – This ISA role is for the carrier to assign permissions to the ISA system for their company. This role also allows the ability to create ISAs (see Note below).

  The ISA Creator role provides access to the Home, Create ISA, View ISAs, Export ISAs (csv), Contact Management, and Documentation menu items. Users with the ISA Creator role can create ISAs, see all their agreement information, make changes to agreements, and export information.

The following role is applicable for railroad service design management and yard operations:

- **ISA Viewer** – This ISA role is for view-only permission to view ISAs that company mark(s) are a party to.

  The ISA Viewer role provides access to the Home, View ISAs, Contact Management, and Documentation menu items. Users with the ISA Viewer role can see all their agreement information but cannot make any changes or export information.

Notes:

1. If you want to manage ISAs for multiple associated roads, complete the request process for the first road and then repeat the request permissions process for the second road. You can request different permission levels for different roads.

2. External users of ISA should select either the ISA Creator role or the ISA Viewer role. These roles can be requested for multiple roads.
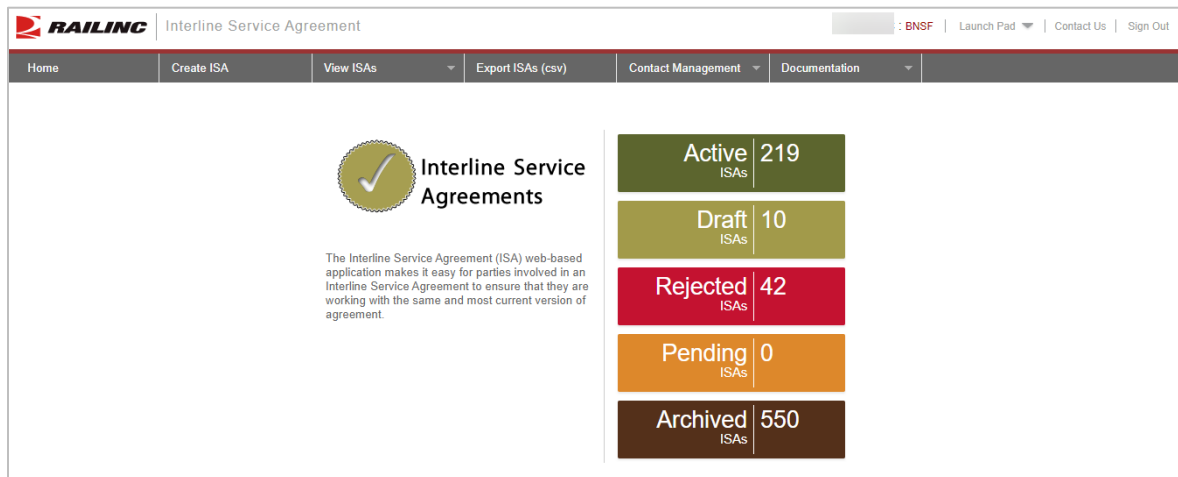
Logging In

To log into the ISA Repository application:

1. From the browser, open the Railinc portal at https://public.railinc.com.

2. Select the **Customer Login** link in the upper right of the screen.

3. Log into SSO. The Railinc Launch Pad is displayed.

4. Select **ISA Repository**. The Interline Service Agreements Home page is displayed. The Home page lists the Standard Carrier Alpha Codes (SCACs) of the road(s) for which you have ISA access.

Exhibit 1. Interline Service Agreements Home Page
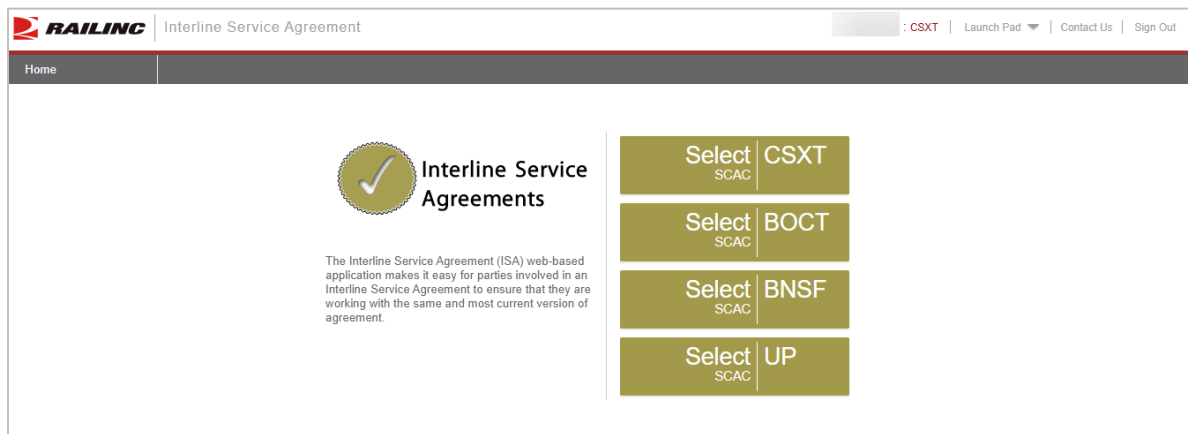
5. Select the **SCAC** of the road for which you want to create or view ISAs. The Interline Service Agreements Welcome page is displayed.

Exhibit 2. Interline Service Agreements Welcome

Continue by either selecting one of the color-coded ISA categories to view all ISAs within that category or an ISA application menu item.

Logging Out

Select the **Sign Out** link to end an ISA session. You are returned to the SSO Login Page.

If multiple SSO applications are open (in separate browser windows), and you want to close only one, close the unwanted session window by selecting the "X" at the top right of the window or pressing **Alt +F4**. Note that selecting the **Sign Out** link ends the entire Single Sign-On session (and all open SSO applications).

If your user session has been idle for more than 30 minutes, a warning message panel is displayed (not shown).
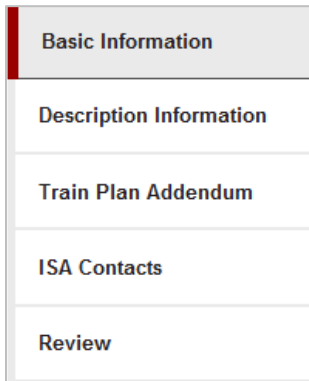
If your user session times out, you must log back in as directed.

Creating ISAs

When you select the **Create ISA tab**, the Create an Interline Service Agreement page with the Basis Information tab is displayed (Exhibit 4).

To create an ISA, you must complete tabs for Basic Information, Description Information, Train Plan Addendum, and ISA Contacts. Prior to submission, the ISA can be reviewed for accuracy on the Review tab. The Create ISA tabs are listed on the left side of the page and are pictured in Exhibit 3.

Exhibit 3. Create ISA Tabs

| Basic Information |
| Description Information |
| Train Plan Addendum |
| ISA Contacts |
| Review |

After you create an ISA in the application and select **Submit ISA for Approval**, the ISA is sent via email to the partner road and contacts identified in the ISA for review and approval. See Working with ISA Emails for examples.

Note: To avoid validation errors and to ensure the completion all required fields, it is recommended that each tab on the ISA is completed in sequential order prior to selecting **Submit ISA for Approval**. If a work in progress draft is required, select **Save ISA as Draft**.

Creating an ISA—Basic Information

This basic information is required before an ISA can be saved as a draft. An approver contact for each railroad is required to submit for approval.

1. Select **Create ISA**. The Create ISA—Basic Information page is displayed (Exhibit 4).

Exhibit 4. Create ISA—Basic Information

2. Complete the following required fields:

   a. **Your Railroad:** Railroad mark of the ISA creator.

   b. **Partner Railroad:** Railroad mark of partner in ISA agreement.

   c. **Interchange Gateway**: Text description of gateway.

   d. **ISA Number**: Follows this format: SPLC, R260 of origin road, R260 of partner road, and then an optional drop-down to identify the shipment type (IM – Intermodal or GM – General Merchandise).

   e. **Effective Date:** Date the agreement becomes effective. Use the calendar icon to assist with selecting the date. Defaults to the current date. Cannot be a date in the past.

   f. **Reason for ISA:** Required free-form field to explain the reason for the agreement.

3. Once the fields are completed as needed, perform one of the following steps:

   a. Select **Next** or the **Description Information** tab. If all validation rules pass the Create ISA—Description Information page is displayed (see Description Information).

   b. Select **Submit ISA for Approval** to save the ISA. If all field entries pass validation, the ISA is saved and appears with a status of **Pending**. A copy of the ISA is emailed to the partner road and contacts identified in the ISA for their review and approval. See Request for Response to Proposed ISA Email.

   c. Select **Save ISA As Draft** to save the ISA as Draft. If all field entries pass validation, the ISA is saved and appears with a status of **Draft**.

   d. Select **Cancel** to cancel the creation of the ISA.

Creating an ISA—Description Information

This basic information is required before an ISA can be saved as a draft. An approver contact for each railroad is required to submit for approval.

1. After completing Basic Information for creating an ISA, select either the **Descriptive Information tab** or the **Next** button. The Create ISA—Description Information page is displayed (Exhibit 5).

Exhibit 5. Create ISA—Description Information (top and bottom)

2. Provide optional description information for one or more entry fields. Each description is limited to 2500 characters. By default, most of the fields are prefilled with standard text, which can be modified as needed. The fields for **Interchange Locations**, **Interchange Events**, and **Train or Traffic Restrictions** are prefilled with suggested template data.

3. Once the fields are completed as needed, perform one of the following steps:

   a. Select **Prev** or the available Create ISA tab to return to that portion of the ISA to perform edits.

   b. Select **Next** or the **Train Plan Addendum** tab. The Train Plan Addendum page is displayed.

   c. Select **Submit ISA for Approval** to save the ISA. If all field entries pass validation, the ISA is saved and appears with a status of **Pending**. A copy of the ISA is emailed to the partner road and contacts identified in the ISA for their review and approval. See Request for Response to Proposed ISA Email.

   d. Select **Save ISA As Draft** to save the ISA as a draft. If all field entries pass validation, the ISA is saved and appears with a status of **Draft**.

   e. Select **Cancel** to cancel the creation of the ISA.

Creating an ISA – Train Plan Addendum

Provide the Train Plan Addendum information. To successfully complete an ISA, one or more Train Plan Addendums must be completed.

1. After completing Basic Information for creating an ISA and the Description Information, select either the **Train Plan Addendum tab** or the **Next** button. The Create ISA— Train Plan Addendum page is displayed.

Exhibit 6. Create ISA—Train Plan Addendum

2. Complete the following required fields:

   a. **From Road => To Road**: Drop down with your road and the partner railroad identified. Used to determine the direction of traffic.

   b. **Time Zone:** Time zone of the interchange. If **Use SPLC** is selected from this drop-down, it defaults to the time zone of the SPLC indicated in the SPLC field just below the Time Zone field.

   c. **Interchange Location:** Free-form text description of the actual interchange location.

   d. **SPLC:** SPLC of the interchange.

   e. **From/To Train ID:** Free-form text descriptions of the involved Train IDs.

   f. **Frequency (optional):** Select one or more listed days of the week the interchange will occur. Once selected, that date appears in dark shading.

   g. **Power Through (optional)**: Select yes or no to determine if access to the locomotive is allowed.

   h. **RSSM Permitted:** Select yes or no to determine if the shipment contains Rail Security Sensitive Materials. This implies if hazardous types of materials are allowable.

   i. **Positive Train Control (mandatory if Power Through = Y):** Select yes or no to indicate if the train is operational in the Positive Train Control environment where the car is received.

    j.   **Window Low (optional):** Enter time to identify the low end of the allowable threshold for the interchange (use military time).

    k.   **Interchange Time (optional):** Enter time to identify the preferred exact time of the interchange (use military time).

    l.   **Window High (optional):** Enter time to identify the high end of the allowable threshold for the interchange (use military time).

    m. **Tons (optional):** Estimated tonnage of the shipment.

    n.   **Feet (optional):** Estimated feet of the shipment.

3.   As needed, select the **Show/Hide Block Description** link to reveal block information input fields for input (Exhibit 7). Complete as needed. Note that blocks can be moved to your desired order.

Exhibit 7. Show/Hide Block Description

4.   Select the **Add General Comments** link and enter your comments (up to 2500 characters).

5.   Once the required fields are entered, perform one of the following steps:

    a.   Select **Prev** or an available Create ISA tab to return to that portion of the ISA to perform edits.

    b.   Select **New TPA** to add additional Train Plan Addendums.

    c.   Select **Copy TPA** to copy the last Train Plan Addendum created and add it to the bottom of the list with the entered fields copied.

    d.   Select **Next** or the **ISA Contacts** tab. The Create ISA—Contacts page is displayed (Exhibit 8).

    e.   Select **Submit ISA for Approval** to save the ISA. If all field entries pass validation, the ISA is saved and appears with a status of **Pending**. A copy of the ISA is emailed to the

partner road and contacts identified in the ISA for their review and approval. See Request for Response to Proposed ISA Email.

 f. Select **Save ISA As Draft** to save the ISA as a draft. If all field entries pass validation, the ISA is saved and appears with a status of **Draft**.

 g. Select **Cancel** to cancel the creation of the ISA.

Creating an ISA—Contacts

Provide the contact information for all parties involved. To successfully submit an ISA, two contacts and their email addresses are required.

Note: Some legacy contacts may not have email addresses. If a contact without an email address is edited, an email address must be added in order to save the contact.
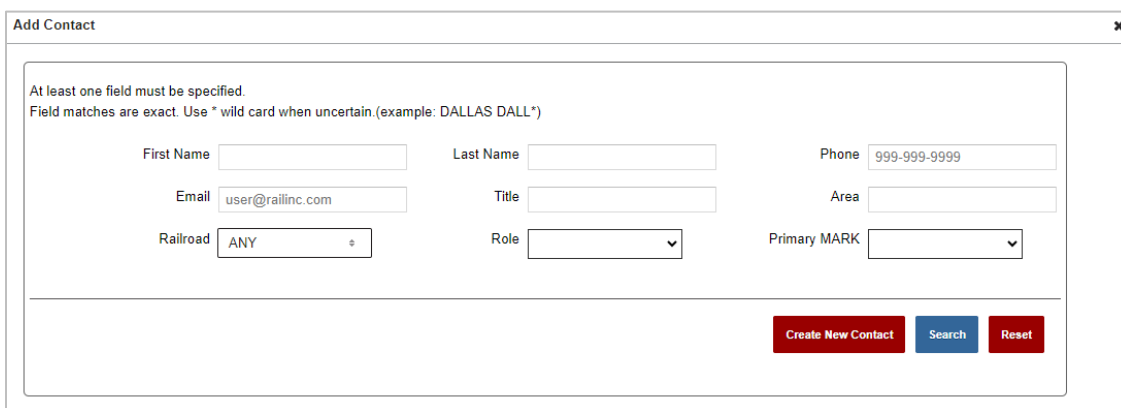
1. After completing Basic Information for creating an ISA, the Description Information, and the Train Plan Addendum, select either the **ISA Contacts tab** or the **Next** button. The Create ISA— Contacts page is displayed.

Exhibit 8. Create ISA—Contacts

2. Select **Add Contact** if you want to add another existing contact to the ISA. The Add Contact pop-up is displayed.
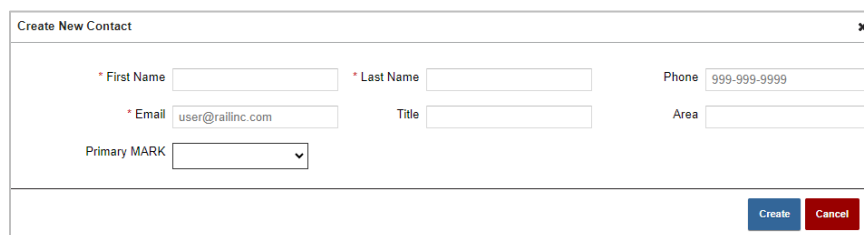
Exhibit 9. Add Contact

a. Search for an existing contact to add to the ISA, using the **Railroad** and **Role** drop-down lists. Enter at least one field (e.g., **Last Name**).

- Select the **Search** button.

- Select a contact from the search results. The selected contact will populate with the contact details.

b. Or select **Create New Contact** to create a new contact to add to the ISA.
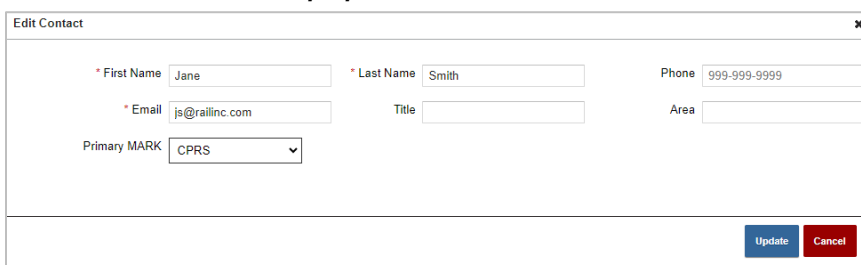
Exhibit 10. Create New Contact

c. Enter the required fields (**First Name**, **Last Name**, **Email**) and select **Create**.

d. Optionally, complete the remaining fields, but these are not required to save the contact: **Phone Number**, **Title** (e.g., Trainmaster), **Area** (e.g., Operations), and **Primary Mark**.

    Note: A primary mark is used primarily by Class I railroads to indicate that the contact can only be added to ISAs for their railroad.

3. If you need to edit the contact, select the **Edit Contact** button. The Edit Contact pop-up is displayed.

Exhibit 11. Edit Contact Pop-up

a. Modify the fields as needed and select the **Update** button. After confirming the update, the modified contact information is associated with the ISA and the changes are reflected in all ISAs except Archived ISAs.

Exhibit 12. Edit Interline Service Agreement

4. If you need to remove a contact, select the **Remove** button associated with a contact to remove that contact from the ISA.

5. Continue to add, update, and remove contacts as needed. Once the fields are completed, perform one of the following steps:

   a. Select **Prev** or an available Create ISA tab to return to that portion of the ISA to perform edits.

   b. Select **Next** or the **Review** tab. The Create ISA—Review page is displayed (Exhibit 13).

   c. Select **Submit ISA for Approval** to save the ISA. If all field entries pass validation, the ISA is saved and appears with a status of **Pending**. A copy of the ISA is emailed to the partner road and contacts identified in the ISA for their review and approval. See Request for Response to Proposed ISA Email.

   d. Select **Save ISA As Draft** to save the ISA as a draft. If all field entries pass validation, the ISA is saved and appears with a status of **Draft**.

   e. Select **Cancel** to cancel the creation of the ISA.

Creating an ISA—Review

Review all entered ISA details prior to submission.

1. After completing the Basic Information for creating an ISA, the Description Information, the Train Plan Addendum, and the ISA Contacts, select either the **ISA Contacts tab** or the **Next** button. The Create ISA— Review page is displayed.

Exhibit 13. Create ISA—Review (top and bottom)

Create an Interline Service Agreement

| Basic Information |
| Description Information |
| Train Plan Addendum |
| ISA Contacts |
| Review |

Review ISA

Basic Information

* Your Railroad CPRS

* Partner Railroad NS

* Interchange Gateway Chicago

* ISA Number 380000 - 105 - 555 -

* Effective Date 08/23/2023

* Reason for ISA Update interchange

Description Information

Interchange Locations To Road1: [enter locations here] To Road2: [enter locations here]

Interchanging Trains, Blocks and Handling See Train Plan Addendum.

Mechanical Inspection Requirements AAR interchange rules apply; receiving carrier will perform standard interchange inspection.

Advance Consist Requirements Advance consist information to be transmitted electronically no later than two (2) hours prior to interchange on run throughs and prior to actual interchange on yard transfers.

Interchange Event To Road1: [enter events here] To Road2: [enter events here]

Train or Traffic Restrictions [enter restrictions here]

Locomotive Requirements Locomotive requirements will be covered in the Master Locomotive Agreement.

Actual Interchange Reporting Interchange reporting will be completed within four (4) hours of the event.

⋮

Block Description

From Block Id   To Block Id

Block Description

General Comments (Limit 2500 characters)

Contacts

New Contact

First Name Jane

Email js@railinc.com

Title

Last Name Smith

* Railroad CPRS

* Role Approver

Phone

Area

Primary MARK CPRS

« Prev

[Submit ISA for Approval] [Save ISA As Draft] [Cancel]

2. Review the created ISA for accuracy and complete one of the following steps:

   a. Select **Prev** or an available Create ISA tab to return to that portion of the ISA to edit.

   b. Select **Submit ISA for Approval** to save the ISA. If all field entries pass validation, the ISA is saved and appears with a status of **Pending**. A copy of the ISA is emailed to the partner road and contacts identified in the ISA for their review and approval. See Request for Response to Proposed ISA Email.

   c. Select **Save ISA As Draft** to save the ISA as a draft. If all field entries pass validation, the ISA is saved and appears with a status of **Draft**.

   d. Select **Cancel** to cancel the creation of the ISA.

Working with Contacts

Contacts are an essential component of ISAs. Many contacts already exist within the ISA Contact Management tool. To use an existing contact, simply search for the contact and add it to the ISA. If information associated with the contact is incorrect, you can edit the information. If a contact does not exist within the Contact Management tool, you can create it.

The Contact Management tool allows contacts to be centrally managed (i.e., any changes made to one instance of a contact are reflected in all ISAs except Archived ISAs).

The Contact Management tool is described in the following sections:

- Creating a New Contact

- Searching for an Existing Contact

- Editing an Existing Contact

- Deleting Contact

Creating a New Contact
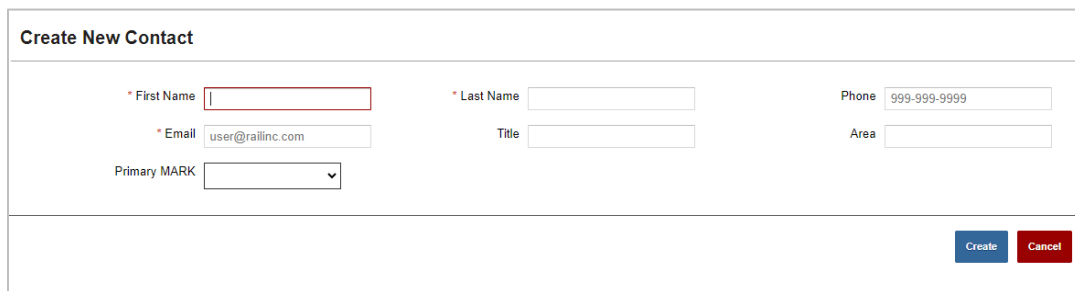
Before a contact can be associated with an ISA, the contact must be created in the ISA Contact Management tool.

Tip! Avoid creating duplicate contact records by first searching to see if a contact already exists.

Use the following procedure to create a new contact:

1. Select **Contact Management** from the menu bar, and then select **Create New Contact**. The Create a New Contact page is displayed.

Exhibit 14. Create a New Contact

2. Complete the required fields: **First Name**, **Last Name**, and **Email**. Last names can include an apostrophe.

Note: Emails are required to be unique. If the email exists, you'll receive an error and will not be able to save the contact.
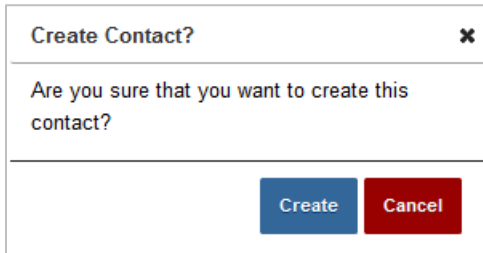
3. Optionally, complete the remaining fields, but these are not required to save the contact: **Phone Number**, **Title** (e.g., Trainmaster), **Area** (e.g., Operations), and **Primary Mark**.

    Note: A primary mark is used primarily by Class I railroads to indicate that the contact can only be added to ISAs for their railroad.

4. Select the **Create** button. A confirmation pop-up is displayed (Exhibit 15).

Exhibit 15. Confirmation Pop-up

5. Select **Create** to create the contact or select **Cancel** to discard your changes. When the contact is created, a success message is displayed.
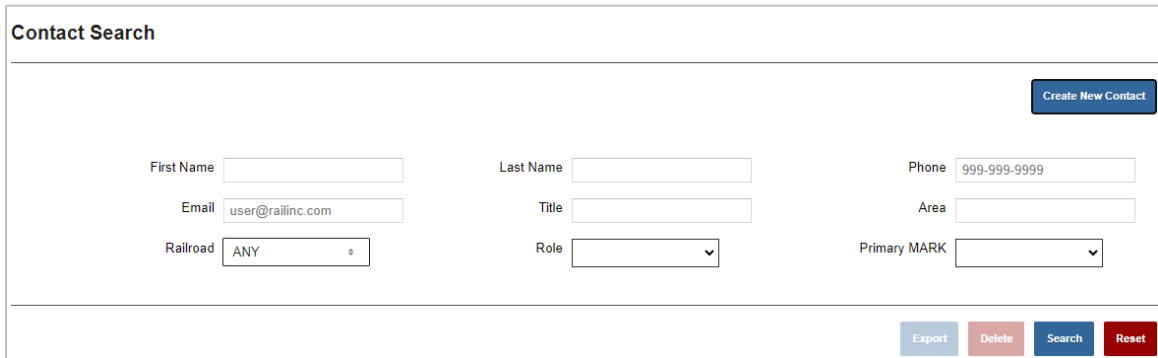
Searching for an Existing Contact

Use the following procedure to search for an existing contact:

1. Select **Contact Management** from the menu bar, and then select **Contact Search**. The Contact Search page is displayed.

Exhibit 16. Contact Search

2. You can select search values using the **Railroad** and/or the **Role** drop-down lists or enter a field. A partial entry can be used when you don't know the complete first name, last name, email, title, or area. An entry is not required to search.

3. Select the **Search** button. Search results are displayed in a grid below the search fields (Exhibit 17).

Exhibit 17. Contact Search Results Using Partial Entries

	First Name	Last Name	Email	Phone	Title	Area	Railroad	Primary MARK	Role
☐	Chris	Davis			Assistant Superintendent	Local Operations	CSXT		Interested Party, Secondary Contact, Approver
☐	Chris	Sanford			Asst. Supt.	Operations	BNSF		
☐	Chris	Bagwell			President		JAIL		Approver
☐	Chris	Gauthier			Asst Director of Operations	Operations & CS	MNNR		Secondary Contact
☐	Chris	Kunce			Sr Mgr Service Design	Service Design	BNSF		Approver, Interested Party, Secondary Contact
☐	Chris	Davis			Terminal Trainmaster	Operations	CSXT		
☐	Chris	Cameron			Terminal Superintendent	Local Operations	CSXT		Secondary Contact
☐	Chris	Knox			GM NOC Operations	Operations	KCS		Approver, Interested Party, Secondary Contact

4. Columns can be sorted by clicking on the column header.

5. To modify an existing contact, see Editing an Existing Contact.

6. To delete one or more contacts, see Deleting Contacts.

7. To perform another search, select the **Reset** button to clear the fields.

Editing an Existing Contact

Use the following procedure to edit (or modify) an existing contact:

Note: If a contact has a primary mark, you can only modify that contact if you are logged in with the same mark as the primary mark of the contact.

1. Locate an existing contact as described in Searching for an Existing Contact.

2. Select the contact in the Search Results grid by clicking inside a row. The Edit Contact page is displayed.

Exhibit 18. Edit Contact
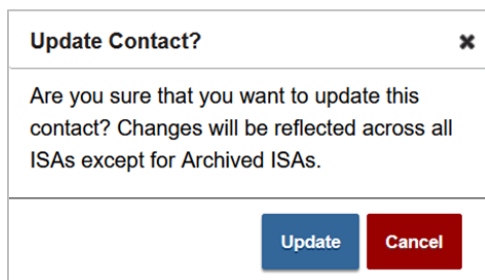
3. To update the contact, make the needed changes to the contact information and select **Update**.

Exhibit 19. Edit Contact Confirmation

Update Contact?	✖
Are you sure that you want to update this contact? Changes will be reflected across all ISAs except for Archived ISAs.	
	Update Cancel

4. Select **Update** to confirm and save your changes in the Contact Management tool. Updates are reflected in any ISA referencing this contact except for Archived ISAs. Select **Cancel** to discard your changes.

5. To delete the contact, select **Delete Contact**.

6. Select **Delete** to confirm and permanently delete the contact or **Cancel** to keep the record (Exhibit 21).

Deleting Contacts

Use the following procedures to permanently delete one or more contacts from the system. These might be duplicates or contacts that are no longer needed. The deleted contacts will be removed from everywhere except on Archived ISAs.

Note: If a contact has a primary mark, you can only delete that contact if you are logged in with the same mark as the primary mark of the contact.

1. Locate one or more existing contacts using the procedure described in Searching for an Existing Contact.

2. To delete one or more records from the **Contact Search** page:

   a. Select contacts by clicking the checkbox of one or more contacts,

   b. Or select the contact in the Search Results grid by clicking inside the row of the contact you want to delete from the Edit Contact page (Exhibit 18). For this option, continue with step 3.

Exhibit 20. Select Checkboxes for Delete

a. Select **Delete** to delete one or more selected rows. A Delete Contact pop-up opens to confirm that you want to delete the contacts and provides the count of ISAs from which the contacts will be removed if you choose to delete them.

Exhibit 21. Delete Contact Confirmation

- Select **Export** to export the list of ISAs with the contacts you want to delete. When Export is selected, the file is automatically downloaded to the Downloads folder on your device.

- Select **Delete** to confirm permanently deleting the contacts and removing them from all ISAs except for Archived ISAs, or select **Cancel** to keep the contacts.

3. To delete a contact from the **Edit Contact** page:

a. Select the contact in the Search Results grid by clicking inside the row of the contact you want to delete. The Edit Contact page is displayed (Exhibit 18).

b. To delete the contact, select **Delete Contact**. A Delete Contact pop-up opens to confirm that you want to delete the contacts and provides the count of ISAs from which the contacts will be removed if you choose to delete them (Exhibit 21).

- Select **Export** to export the list of ISAs with the contact you want to delete. When Export is selected, the file is automatically downloaded to the Downloads folder on your device.

- Select **Delete** to confirm permanently deleting the contact and removing it from all ISAs except for Archived ISAs, or **Cancel** to keep the contact.

c. When the contact is deleted, you are returned to the Search Results grid, which is updated to no longer include the deleted contact.

Working with ISA Emails

When you have successfully created and saved an ISA in the ISA Repository, a copy of the ISA is emailed to the partner road and to the contacts identified in the ISA for their review and approval.

The system generates the following three types of emails:

- Request for Response to Proposed ISA
- Reminder of Pending ISA Request
- Disposition Notification on ISA (Approved or Rejected). ISAs can be actively or passively accepted, either via a disposition provided by email response or passively accepted after 30 days without a response. ISAs can be rejected by email response.

Request for Response to Proposed ISA Email

Following the creation of an ISA, it is sent to the partner road and contacts identified in the ISA for their review and approval as a request for response email.

Note: Here are some general rules regarding email response requests:

- A proposed ISAs is automatically accepted if no response is received within 30 days from the date it is sent.

- Ensure that you select either the **Approve** or **Reject** link just once. Selecting these links multiple times may lead to undesirable results.

- Selecting either the **Approve** or **Reject** link automatically opens a new email window with a pre-populated subject line. The system uses this auto-generated subject line for the ISA approval/rejection process. Please do not change the subject line on the response email.

Below is an example of a request for response to proposed ISA email:
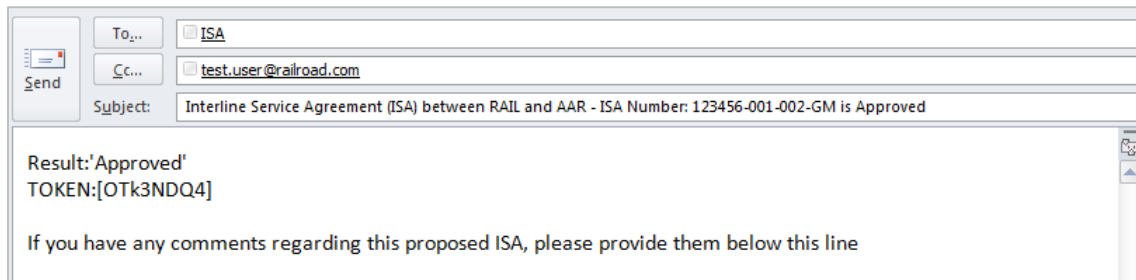
Exhibit 22. Request for Response to a Proposed ISA Email
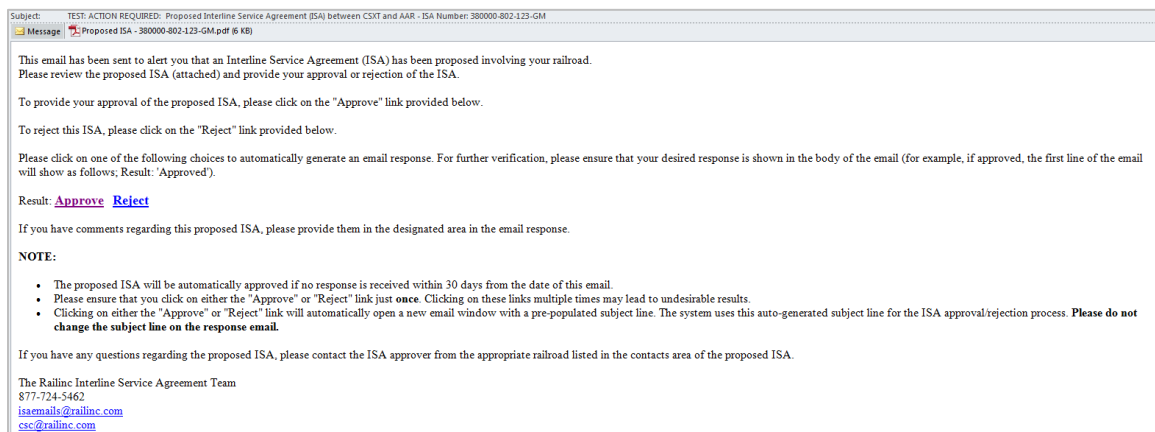
Use the following procedure to respond to the request for response to proposed ISA email:

1. Open the attached proposed ISA PDF to review it.

2. Perform one of the following actions from the body of the email:

   a. Select **Approve** to approve the specifics of the ISA. An email is prepared to be sent to the proposer of the ISA and the identified contacts.

Exhibit 23. Sample Request Response Email (Approved)
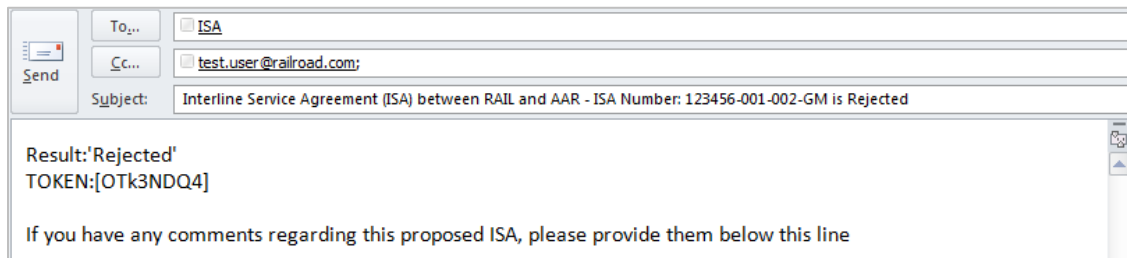
	To...	☐ ISA
Send	Cc...	☐ test.user@railroad.com
	Subject:	Interline Service Agreement (ISA) between RAIL and AAR - ISA Number: 123456-001-002-GM is Approved

Result:'Approved'
TOKEN:[OTk3NDQ4]

If you have any comments regarding this proposed ISA, please provide them below this line

As needed, add any additional comments to the email and send it. The email is processed by Railinc, and the status of the ISA is changed to **Active**.

   b. Select **Reject** to reject the proposed ISA. An email is prepared to be sent to the proposer and the ISA and the identified contacts.

Exhibit 24. Sample Request Response Email (Rejected)

	To...	☐ ISA
Send	Cc...	☐ test.user@railroad.com;
	Subject:	Interline Service Agreement (ISA) between RAIL and AAR - ISA Number: 123456-001-002-GM is Rejected

Result:'Rejected'
TOKEN:[OTk3NDQ4]

If you have any comments regarding this proposed ISA, please provide them below this line

   c. As needed, add any additional comments to the email and send it. The email is processed by Railinc, and the status of the ISA is changed to **Rejected**.

Reminder of Pending ISA Request Email

If a response has not been received in 7 days, a reminder email is sent out. Below is an example email.

Exhibit 25. Reminder of Pending ISA Request Email
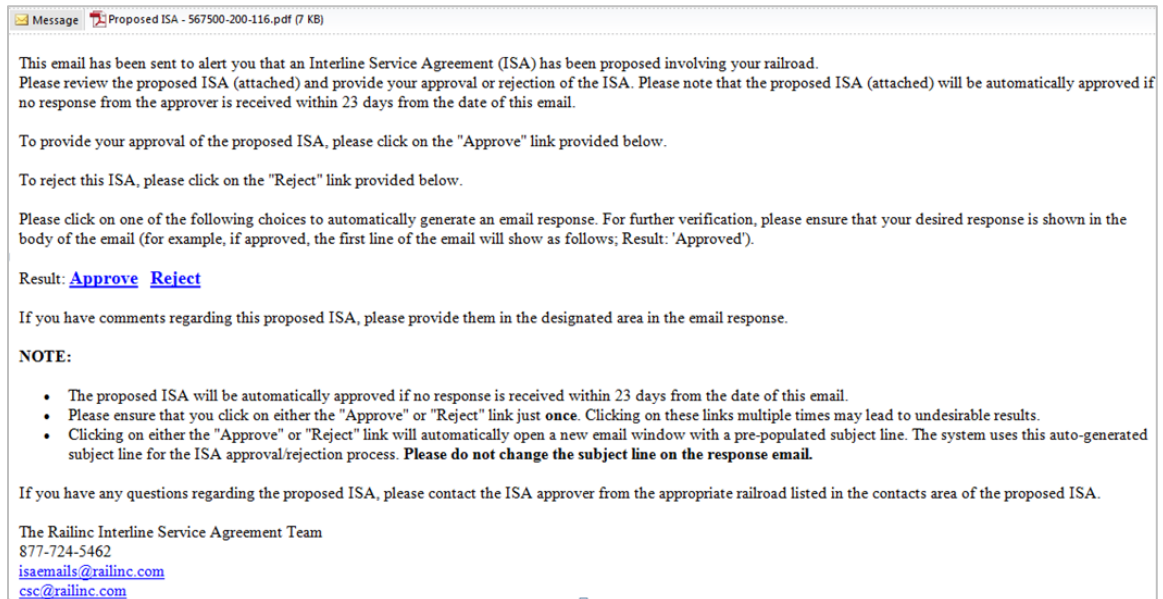
The actions available are the same as on the initial Request for Response to a Proposed ISA Email. See Request for Response to Proposed ISA Email steps 1 and 2.

Disposition Notifications on Approved or Rejected ISA

Disposition notifications are sent following either the approval or rejection of an ISA request. If a submitted ISA is not approved within 30 days, then it is passively accepted.

Exhibit 26, Exhibit 27, and Exhibit 28 are examples of disposition emails:

Exhibit 26. Manually Rejected ISA

Message | Rejected ISA - 625930-029-777-GM.pdf (6 KB)

This email has been sent to alert you that the above referenced Interline Service Agreement (attached) involving your railroad has been rejected.

If you have any questions regarding this ISA, please contact the ISA approver from the partner railroad listed in the contacts area of the ISA.

The Railinc Interline Service Agreement Team
877-724-5462
csc@railinc.com

Exhibit 27. Manually Approved ISA

Message | Approved ISA - 261000-555-549.pdf (7 KB)

This email has been sent to alert you that the above referenced Interline Service Agreement (attached) involving your railroad has been approved.

If you have any questions regarding this ISA, please contact the ISA approver from the partner railroad listed in the contacts area of the ISA.

The Railinc Interline Service Agreement Team
877-724-5462
csc@railinc.com

Exhibit 28. Auto-Accepted ISA – No Response After 30 Days

Message | Approved ISA - 344200-712-372.pdf (7 KB)

This email has been sent to alert you that the above referenced Interline Service Agreement (attached) involving your railroad has been automatically approved due to lack of response within 30 days of creation of the ISA.

If you have any questions regarding this ISA, please contact the ISA approver from the partner railroad listed in the contacts area of the ISA.

The Railinc Interline Service Agreement Team
877-724-5462
isaemails@railinc.com
csc@railinc.com

Working with Existing ISAs

When you select **View ISAs** on an ISA page, the View ISAs menu is displayed.

Exhibit 29. View ISAs Menu
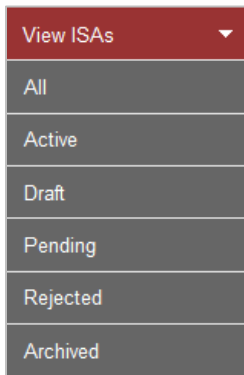
Note: Any of these described views can also be reached directly from the Dashboard on the Welcome page (Exhibit 30).

Below are the tasks available on the View ISAs menu. Select a status to open a list of ISAs with the selected status:

Exhibit 30. ISA Status Dashboard
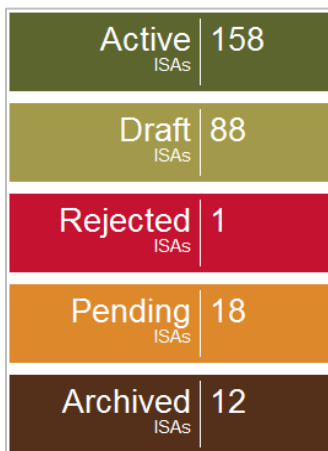
Exhibit 31. View ISAs Menu Items and Descriptions

Menu Item	Description
All	Allows you to view all ISAs.
Active	Allows you to view active ISAs. Active ISAs have been approved by both railroad parties and its effective date has been reached. An ISA could be active as a result of direct email response or auto-approval as a result of 30 days of no response.

Draft	Allows you to view draft ISAs. Draft ISAs have not been submitted for approval.
	Note: Only the original creator of the ISA with the ISA Creator role may delete an ISA in draft status.
Pending	Allows you to view Pending ISAs. Pending ISAs have been approved by only one party.
Rejected	Allows you to view rejected ISAs. Rejected ISAs have been rejected by the approving party. An ISA could be rejected on the email.
	Note: Either party to the ISA with the ISA Creator role may edit an ISA in rejected status for saving and resubmission.
Archived	Allows you to view archived ISAs. Archived ISAs are stored for historical purposes. Like other ISAs, archived ISAs can be cloned if needed later.

Viewing ISAs

This section describes how to view ISAs. Because the view screen is the same for the views of ISAs of all statuses, the procedure is only shown once. However, the actions available on the details page for Draft ISAs differ; therefore, see Viewing/Managing Draft ISAs for more information about Draft ISAs. Once you've selected the SCAC from the Home page:

1. Select the ISA status that is listed on the dashboard page (Exhibit 30) or select **View ISAs** from the main menu and select the desired ISA status (**All**, **Active**, **Pending Draft**, **Rejected**, or **Archived**). The selected View Interline Service Agreements page is displayed.

Exhibit 32. View Interline Service Agreements

2. To search for a specific ISA, begin typing a SPLC in the ISA Number search field and select the search icon ( ).

3. To sort the table data, select the column heading of the desired sort. The data is refreshed in alpha/numeric order based on the selection (see below for an example). Reverse the order by selecting the same column heading again.

Exhibit 33. Column Sort Example (sorted on Partner Railroad)

	ISA Number	Partner Railroad ▲	Interchange Gateway	Contacts	Effective Date	Date of Last Action	ISA Status
☐	SPLC 🔍		Search for Interchange Gatew				Select options ⟳
☐	472600-019-777-GM	ABWR	Birmingham including: North Birmingham, AL - SPLC 472610	Jon Helm, Jason Ford, Tim Kelly, Utilis Vinson	09/14/2009	04/22/2019	ACTIVE
☐	123456-098-098	ACWR	GATX		07/13/2010	07/09/2010	DRAFT
☐	398765-090-090	ACWR	GATX		07/05/2010	07/09/2010	DRAFT
☐	483128-127-777	AGR	STATIONS INCLUDING: AMORY, MS - SPLC 483128 COLUMBUS, MS - SPLC 484040	Jon Helm, Steve Brockwell, Phil Hageman...	01/14/2019	04/22/2019	ACTIVE
☐	657450-590-777	AKDN	LAFAYETTE INCLUDING: CROWLEY, LA - SPLC 657570	Darrell Kitchen, Ruben Ramos, Brian Hauber...	05/02/2018	05/11/2018	ACTIVE
☐	396640-002-555	ALS	ST LOUIS, MO	Al Reinsch, Paul Hinton, Scott St. Clair...	08/09/2019	09/06/2019	ACTIVE

4. To filter results, select one of the filter boxes located beneath the column headings and then select the column value to filter.

   - For the Interchange Gateway and Contacts columns, you can filter using the **OR** function by placing a bar (|) between values (e.g., Joe | Jim).

   - For the ISA Status column, you can select multiple values to filter. Simply select multiple checkboxes, and then select the refresh icon (⟳) to the right of the filter box.

5. To update the ISA roles, select at least one ISA that is in **Active** or **Draft** status. See Updating ISA Roles for details.

6. To add existing contacts to ISAs, select at least one ISA that is in **Active** or **Draft** status. See Adding ISA Contacts for details.

7. To remove contacts from ISAs, select at least one ISA that is in **Active** or **Draft** status. See Removing ISA Contacts for details.

8. To view the details of a listed ISA, click inside the appropriate row. The View ISA Details page is displayed for the selected record.

Exhibit 34. View ISA Details (top of page shown)

9. Perform one of the following steps:

    a. Select **Back to ISAs List** (top/bottom left) to return to the previously displayed View Interline Service Agreements page.

    b. Select **Download PDF** (top/bottom left) to download the displayed ISA record in PDF format. Use the standard tools within the PDF to save, print or share the record as an email attachment.

Exhibit 35. ISA (downloaded as a PDF)

Owner Mark:	BNSF
Origin Railroad:	BNSF
Partner Railroad:	BRC
ISA Status:	ARCHIVED

1.	**Reason for ISA:**	5/6/19 Update departure times on BRCNTW, BRCGAL, BRCEOL trains per Matt Heinbaugh/Mike Martinez
2.	**ISA Number:**	380000-083-777-GM
3.	**Interchange Gateway:**	CHICAGO INCLUDING: CLEARING, IL - SPLC 380433
4.	**Effective Date:**	05/06/2019

Interchange Locations	To BRC: Clearing, IL To BNSF: Clearing, IL
Interchange Event	To BRC: Traffic, for both car hire interchange and reporting the physical arrival in train 10 messages for performance measurements, will be interchanged at the time cars are cut off on designated inbound receiving track(s) at Clearing Yard. To BNSF: Traffic, for purposes of car hire interchange, is interchanged 1-minute after a car is humped onto a classification track at Clearing Yard, per BRC Amended Operating Agreement. Traffic, for purposes of reporting the physical departure in Train 10 messages for performance measurements, will be at the time a train departing from Clearing Yard passes the AEI readers at either the West Sub or Hayford, whichever is applicable. BRC will provide an actual 418 to BNSF of the train consist as read by the reader.
Interchanging Trains, Blocks and Handling	See Train Plan Addendum.
Train or Traffic Restrictions	[enter restrictions here]
Mechanical Inspection Requirements	AAR interchange rules apply; receiving carrier will perform standard interchange inspection.

a. Select **Edit ISA Contacts** (top/bottom right) to edit or create contacts from an existing ISA.

- Select **Edit Contact**.

- Edit a contact or scroll to the bottom and select **Add Contact** to create a contact (Exhibit 9).

- Select **Create New Contact** and follow the steps under Exhibit 10. See ISA Contacts to learn more about creating contacts.

- Select **Archive ISA** (top/bottom right) to archive the ISA. See Archiving ISAs

Select **Clone ISA** (top/bottom right) to create a new ISA based on the details of the currently viewed ISA. See Cloning ISAs.

Archiving ISAs

You can archive an active, existing ISA for your mark. Once an ISA is archived, it is no longer an active ISA. Once archived, it is available to view as an archived ISA for historical purposes. Archived ISAs cannot be made active, but they can be cloned (Cloning ISAs), and the clone can be saved as an active ISA. Use the following procedure to archive an ISA.

1. Access an ISA details record (see Viewing ISAs or Viewing/Managing Draft ISAs).

2. Select **Archive ISA**.

Exhibit 36. Archive ISA Confirmation Pop-up

3. Select **Ok** to confirm that you want to archive the ISA or **Cancel** to dismiss the confirmation without archiving the ISA.

4. View archived ISAs by selecting **View ISAs** from the main menu and **Archived**.

Cloning ISAs

You can create a new ISA based on an existing ISA. This is referred to as cloning. Use the following procedure to clone an ISA:

1. Access an ISA details record (see Viewing ISAs or Viewing/Managing Draft ISAs).

2. Select **Clone ISA**. The Clone Interline Service Agreement page is displayed.

Exhibit 37. Clone Interline Service Agreement

3. Complete the input fields and submit the cloned ISA. See Creating ISAs for details on how to complete an ISA.

Adding ISA Contacts

To create a new contact, see Creating a New Contact. Once a contact is created, use the following procedure to search on existing contacts and add them to **Active** and **Draft** ISAs. When **Pending** and/or **Rejected** ISAs are selected, this feature is not available, and the **Add Contacts** button is grayed out.

1. Select **View ISAs** and select **All**, **Active** or **Draft** from the main menu.

2. If you selected All in the previous step, you have the option of filtering on the status. Select **Active** and/or **Draft** records using the **ISA Status** filter (last column) and select the refresh button ( ) to filter the records.

Exhibit 38. ISA Status Filter

3. Columns can be sorted by clicking on the column header.

4. Select one or more checkboxes (first column) of **Active** and/or **Draft** records (Exhibit 39).

5. Select the **Add Contacts** button in the top right. The Add Contacts pop-up displays.

Exhibit 39. Add Contacts Pop-up

6. You can select search values using the **Railroad** and/or the **Role** drop-down lists or enter a field. A partial entry can be used when you don't know the complete first name, last name, email, title, or area. An entry is not required to search.

7. Select **Search**. Records that match appear below your search criteria.

Exhibit 40. Search Results

8. Columns can be sorted by clicking on the column header.

9. Select the green plus to open the contact. Select the road and role for each ISA selected, and then select **Add Contact**.

   Note: Contacts with a gray "+" in the leftmost column cannot be updated because their primary mark does not match the mark listed on the ISA.

10. Select the appropriate role in the **New Role** drop-down for each contact selected. All selected contacts must have a selected role.

Exhibit 41. Selecting ISA Contacts from Search Results

11. Select **Add Contacts** to add the selected contact(s) to the selected ISAs.

12. When contacts are added, you'll receive the following success confirmation message:

Exhibit 42. Success Message for Adding Contacts to ISAs

Confirmation Messages

Contact added successfully.

Editing ISA Contacts

Users with the ISA Creator role can use the following procedure to modify contact information on active ISAs.

1. Access an active ISA details record (see Viewing ISAs).

2. Select **Edit ISA Contact**s. The Edit Interline Service Agreement page is displayed.

Exhibit 43. Edit Interline Service Agreement (top and bottom)

3. Select the **Edit Contact** button. The Edit Contact pop-up is displayed.

Exhibit 44. Edit Contact Pop-up
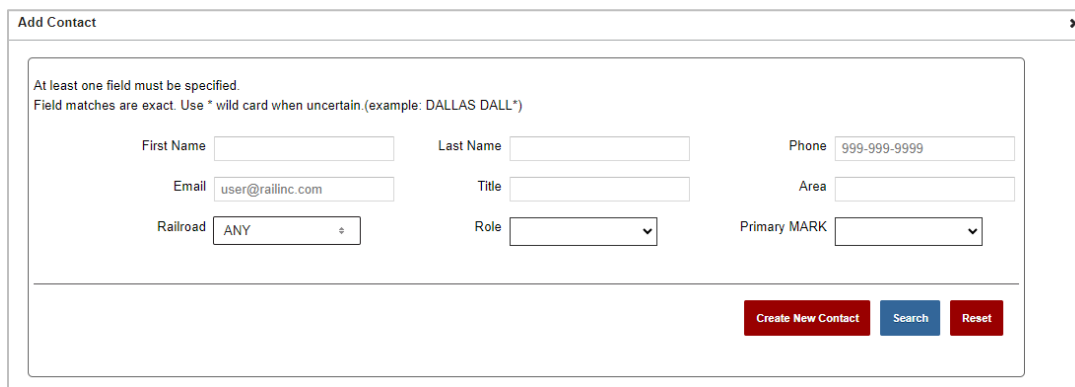
4. Modify the fields as needed and select the **Update** button. After confirming the update, the modified contact information is associated with the ISA and the changes are reflected in any ISA referencing this contact.

5. Continue to add or update ISA contacts as needed. Select **Add Contact** if you want to add another existing contact to the ISA. The Add Contact pop-up is displayed.

Exhibit 45. Add Contact Pop-up

6. You can select search values using the **Railroad** and/or the **Role** drop-down lists or enter a field. A partial entry can be used when you don't know the complete first name, last name, email, title or area. An entry is not required to search.

7. Select the **Search** button.

8. Select a contact from the search results. The selected contact will populate with the contact details.

9. If you need to remove a contact, select the **Remove** button associated with a contact to remove that contact from the ISA.

10. Continue to add, update, and remove contacts and select **Save ISA Contacts**. See ISA Contacts for details on how to complete the ISA contacts fields.

Removing ISA Contacts

Use the following procedure to remove existing contacts from **Active** and **Draft** ISAs. When **Pending** and/or **Rejected** ISAs are selected, this feature is not available and the **Remove Contacts** button is grayed out. Removing a contact from an ISA does not delete the contact from the system, only from the selected ISA. To permanently delete a contact from the system, see Deleting Contacts.

1. Select **View ISAs** and select **All**, **Active** or **Draft** from the main menu.

2. If you selected All in the previous step, you have the option of filtering on the status. Select **Active** and/or **Draft** records using the **ISA Status** filter (last column) and select the refresh button (◯) to filter the records (Exhibit 38). Columns can be sorted by clicking on the column header.

3. Select one or more checkboxes (first column) of **Active** and/or **Draft** records (Exhibit 39).

4. Select the **Remove Contacts** button in the top right. The Remove Contacts pop-up displays.

5. Columns can be sorted by clicking on the column header.

6. Select one or more contacts to remove by clicking the checkbox(es) in the first column.

Exhibit 46. Remove Contacts Pop-up

7. Select **Remove Contacts** to remove the selected contact(s) from the selected ISAs.

8. When contacts are removed, you'll receive the following success confirmation message:

Exhibit 47. Success Message for Removing Contacts from ISAs

Updating ISA Roles

Use the following procedure to update roles for existing ISA contacts in **Active** and **Draft** ISAs. When **Pending** and/or **Rejected** ISAs are selected, this feature is not available and the **Update Roles** button is grayed out.

1. Select **View ISAs** and select **All**, **Active** or **Draft** from the main menu.

2. If you selected All in the previous step, you have the option of filtering on the status. Select **Active** and/or **Draft** records using the **ISA Status** filter (last column) and select the refresh button (🔄) to filter the records (Exhibit 38). Columns can be sorted by clicking on the column header.

3. Select one or more checkboxes (first column) of **Active** and/or **Draft** records (Exhibit 39).

4. Select the **Update Roles** button in the top right. The Edit Contact's Role on Selected ISAs pop-up displays.

5. Columns can be sorted by clicking on the column header.

6. Select one or more contacts to update by clicking the green + icon in the first column. Details for the row appears and the icon changes to a red – icon.

7. Select the new role from the drop-down in the last column for each selected row and the text color of the new role changes to blue to show which ones have been modified.

Exhibit 48. Edit Contact's Role on Selected ISAs

8. Select **Update Roles** to update the roles of the selected contact(s) for the selected ISAs.

9. When roles are updated, you'll receive the following success confirmation message:

Exhibit 49. Success Message for Updating Roles for ISAs

Viewing/Managing Draft ISAs

Use the following procedure to view and manage ISAs saved in Draft status.

1. Select **View ISAs** > **Draft**. The View Interline Service Agreements page for Draft ISAs is displayed.

Exhibit 50. View Interline Service Agreements (Draft ISAs)

2. To view details of a listed Draft ISA, select the desired row. The View Details page for the selected Draft record is displayed.

Exhibit 51. View ISA Details for Draft ISA

3. Perform one of the following steps:

   a. Select **Back to ISAs List** to return to the previously displayed View Interline Service Agreements page.

   b. Select **Download PDF** to download the displayed ISA record in PDF format (Exhibit 35). Use the standard tools within the PDF to save, print or share the record as an email attachment.

   c. Select **Edit ISA** to make edits to the displayed draft ISA. See Editing a Draft ISA.

   d. Select **Archive ISA** to archive the displayed draft ISA. See Archiving a Draft ISA.

   e. Select **Clone ISA** to create a new ISA based on the details of the currently viewed ISA. See Cloning ISAs.

   f. Select **Delete ISA** to delete the draft ISA. A confirmation pop-up is displayed so you can confirm the deletion. **Note:** Only the original creator of the ISA with the ISA Creator role may delete an ISA in draft status.

Editing a Draft ISA

Draft ISAs can be edited and then saved and submitted.

1. Access an ISA draft details record (see <u>Viewing/Managing Draft ISAs</u>).

2. Select **Edit ISA**. The Edit Interline Service Agreement page is displayed.

Exhibit 52. Edit Interline Service Agreement

3. Complete the input fields and submit the edited ISA. See <u>Creating ISAs</u> for details on how to complete an ISA.

Archiving a Draft ISA

Draft ISAs can be archived. Once an ISA has been placed in archive status it can no longer be edited.

1. Access an ISA draft details record (see <u>Viewing/Managing Draft ISAs</u>).

2. Select **Archive ISA**. A pop-up box appears asking for confirmation.

Exhibit 53. Archive ISA Confirmation Pop-up

3. Select **OK** to confirm the decision to archive the ISA; otherwise, select **Cancel**.

Exporting ISAs

The ISA Repository enables users to export their ISAs. The exported file will contain Active ISAs for the mark you selected from the home page (Exhibit 1).

When **Export ISAs (csv)** is selected, the file of your active ISAs is automatically downloaded to your device (shown at the top of the browser for Firefox users and at the bottom left for Chrome users).

Exhibit 54. Export Pop-up Prompt
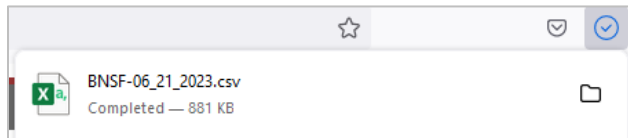
Viewing Documentation

The ISA Documentation menu provides helpful tools, including this user guide and information to help interpret exported ISAs.

Downloading the User Guide

Use the following procedure to download the latest version of this user guide.

1. Select **Documentation** > **User Guide**. The User Guide opens as a PDF file.

Exhibit 55. ISA User Guide
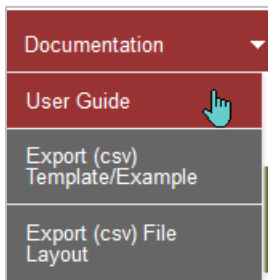
2. Use the tools within the PDF, including the embedded hyperlinks and bookmarks, to view, print, and search the document.

Downloading the Export (CSV) Template/Example

Use the following procedure to download the Export (csv) Template/Example.

1. Select **Documentation> Export (csv) Template/Example**.

   The Export (CSV) Template/Example file is automatically downloaded and saved to your device.

2. Open the template and use the tools within the spreadsheet application to navigate the instructions.

Downloading the Export (CSV) File Layout

Use the following procedure to download the Export (csv) File Layout.

1. Select **Documentation> Export (csv) File Layout**.

   The Export (csv) File Layout file is automatically downloaded and saved to your device.

2. Open the file and use the tools within the application to navigate the file layout.

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