



# Loading Authority OT-57 User Guide



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## Learning about Loading Authority (OT-57)

The Loading Authority (OT-57) system is a web-based application for creating fleets and viewing contact and storage location information.

This document describes how to use the Loading Authority (OT-57) system through the following major sections:

- [Overview](#) provides basic information about the system
- [Getting Started](#) describes how to access and log into the system

Fleet managers have the ability to create and manage fleets. Fleets are created and managed to register private equipment per [Circular OT-57](#) with controlling entities and with equipment contact information and storage locations. Fleet information provides railroads with the needed contact and empty destination information for private equipment. By providing valid contact and storage information in the fleet information section, private rail equipment can be effectively managed when traveling on a railroad's line.

- [Creating Fleets](#) describes how to create a fleet
- [Managing Fleets](#) describes all the functions available for managing a fleet
- [Equipment Search](#) describes how to query an equipment search
- [Requesting Disposition](#) describes how to request dispositions
- [Managing Disposition Requests](#) describes how to manage disposition requests
- [Managing Transfer Requests](#) describes how to manage transfer requests
- [Managing Locations](#) describes how to manage locations
- [Glossary](#) and [Index](#)

To access Loading Authority (OT-57) documentation (i.e., this user guide) at any time, select the **Documentation** menu item from the application menu.

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## Overview

The Loading Authority OT-57 system provides a centralized, paperless process for the registration of private freight rail equipment. It is a web-based communication system that facilitates the communication between railroads and controlling entities. Private rail equipment must be registered in the Loading Authority OT-57 system with a valid controlling entity contact and storage location information. Refer to the *Association of American Railroads Circular OT-57 for Rules Governing Registration of Private Cars and Controlling Entity Contact & Storage Information* for more information.

The Loading Authority OT-57 system enables private equipment owners, lessees, and shippers to create Loading Authority OT-57 fleets and enables railroads to view contact and storage location information. In addition, the Loading Authority OT-57 system supports data integrity by receiving automated updates from Railinc's Customer Identification File (CIF), the Centralized Station Master (CSM), and Umler®.

The use of a secure and confidential Loading Authority OT-57 database assists all parties in a collaborative effort to ensure needs are met while protecting the railroads' network. By leveraging other applications such as Umler and FindUs.Rail, the Loading Authority OT-57 system offers both railroads and car owners/shippers the ability to accurately define equipment subject to Loading Authority OT-57 and provides a ready means to move empty equipment to an authorized storage location.

The Loading Authority OT-57 system makes use of the Railinc Industry Reference Files (IRF) and the data in Umler to validate that the equipment added to the system is registered and that there are no critical errors associated with the registration.


## General Business Rules

The following general business rules apply to Loading Authority OT-57:

- Equipment Owners, Lessees, Shippers, and approved agents/third parties may have access to create a Loading Authority OT-57 Fleet. Single Sign-On rights must be granted that allow access to the Loading Authority OT-57 system.
- A freight car may only be on one active Loading Authority OT-57 fleet at a time.
- A Loading Authority OT-57 fleet has a maximum limit of 50,000 pieces of equipment.
- Information listed in a fleet must be valid; the Railinc Industry Reference Files are used for validation.
- A Loading Authority OT-57 fleet does not expire.
- A fleet manager can manually delete a fleet or remove equipment from fleets.
- Railroads are only able to view equipment in their company's possession.
- Equipment Owners are able to view and remove equipment from any fleet where they are the stenciled mark owner.
- Controlling Entity contact information is maintained in the FindUs.Rail application.

## System Interface Notes

The following system interface notes apply to the Loading Authority OT-57 System:

- All sections and fields marked with an asterisk \* are mandatory. Items that do not have an entry box next to them are display only and are populated as the mandatory data is entered.
- Certain fields have a corresponding magnifying glass icon . You can select the magnifying glass to search for valid data for the corresponding field. Industry Reference File data lookups also use (\*) wildcarding to assist users in looking up data.
- The system is available 24/7 except for scheduled maintenance.

## 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](#).

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## 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](mailto:csc@railinc.com).

## Getting Started

Loading Authority OT-57 uses Railinc Single Sign-On (SSO) which is accessed from the Railinc portal at <https://public.railinc.com>. Select the **Customer Login** link in the upper right corner of the page. Then, follow these steps:

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 Loading Authority (OT-57) within SSO.
2. If you are a controlling entity who will be creating fleets in the Loading Authority (OT-57) application, you need to be setup in the FindUs.Rail database with your email and phone number contact information. Within FindUs.Rail, there is a Loading Authority (OT-57) controlling entity contact type. If this contact information is not setup, then your controlling entity contact information will not be available for selection when your company's fleets are created. If you are not already registered in the FindUs.Rail contact database, go to <https://public.railinc.com> to request permission after establishing your SSO account. See [Appendix A. Adding OT-57 Contacts to FindUs.Rail](#) for additional information. Refer to the [FindUs.Rail User Guide](#) for complete instructions on using the FindUs.Rail system.
3. If you do not have access to the Loading Authority (OT-57) application, request access to Loading Authority (OT-57) by following instructions in the [Railinc Single Sign-On User Guide](#). See [User Roles](#) for information about the available levels of access. When you have received e-mail notification confirming your access to Loading Authority (OT-57), you can log on and begin using Loading Authority (OT-57).

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## User Roles

Your assigned user role determines the functions you can perform. User roles are assigned by Railinc through the SSO interface, which is described in the [Railinc Single Sign-On User Guide](#).

- **Equipment Owner** – Allows Equipment Owners to remove equipment from fleets. See [Equipment Search](#).
- **Fleet Manager** – Allows Fleet Managers to create and manage fleets, manage locations and search equipment.
- **Railroad User** – Allows Railroad Users to search controlling entity and storage information for equipment. See [Equipment Search](#). When a Railroad User also manages fleets, the user must have Fleet Manager permissions under a different mark than the railroad mark.

### Exhibit 1. Request Application Access By Role

The screenshot shows a web form titled "Loading Authority (OT-57)" with a subtitle "Loading Authority (OT-57) application allows Controlling Entity to Create and Manage Fleet Contact Information". At the top, there is a progress bar with three steps: "1 Select Roles", "2 Confirm", and "3 Done". The "1 Select Roles" step is active. Below the progress bar, there are three checkboxes, each with a label and a description:

- Loading Authority (OT-57) Equipment Owner ( MARK required )  
Allows Equipment Owners to remove equipment from fleets.
- Loading Authority (OT-57) Fleet Manager ( MARK required )  
Allows fleet managers to create fleets.
- Loading Authority (OT-57) Railroad User ( MARK required )  
Allows Railroad users to search controlling entity and storage information for equipment.

Below the checkboxes is a "Comments..." field with a text input area. At the bottom right, there are two buttons: a red "Return" button and a grey "Next" button. A small "0/255" character count is visible next to the "Next" button.

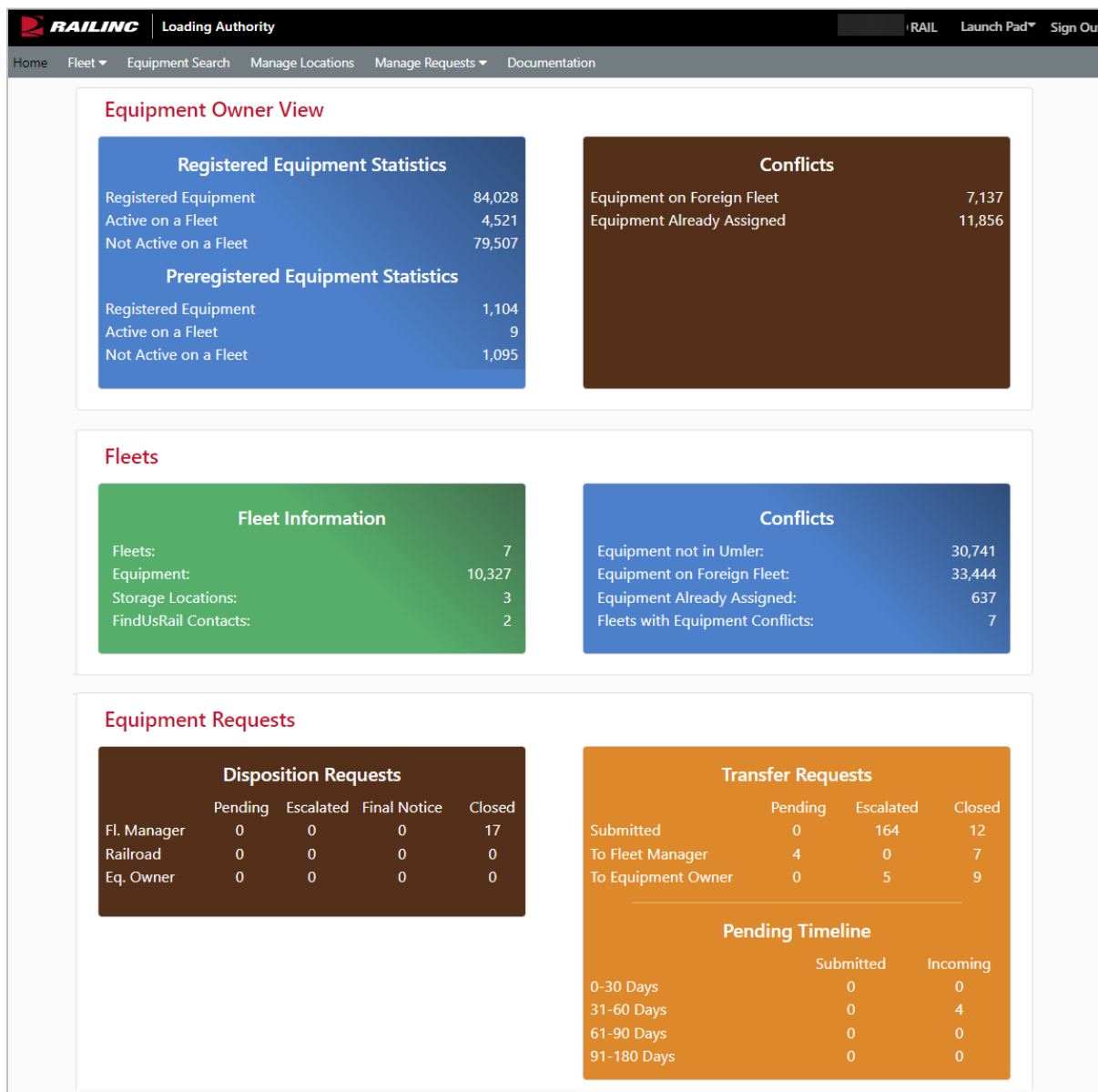
---

## Logging In

To log into Loading Authority (OT-57):

1. Open your internet browser.
2. Enter the following URL: <https://public.railinc.com/>. Select the **Customer Login** link in the upper right corner of the page.
3. In the Account Access panel, enter your User ID and Password. Select **Sign In**. The Railinc Launch Pad is displayed.
4. In the **My Applications** section, select **Loading Authority (OT-57)**. The Loading Authority (OT-57) Dashboard page is displayed. The sections that appear in the Dashboard are dependent on your user role (User Roles). Users with the Equipment Owner and Fleet Manager roles will see the sections that are pictured below.

Exhibit 2. Dashboard – Equipment Owner and Fleet Manager



## Managing Multiple Companies

Some Loading Authority (OT-57) users, especially those who work for larger agencies, manage more than one company.

If you manage one company, your company is automatically selected – you do not need to select a company to manage – and the Loading Authority (OT-57) System Dashboard page appears when you log in (see [The Dashboard](#)).

After you have been successfully set up in Railinc’s SSO with the appropriate Loading Authority role assigned, you can then manage more than one company. To do this, at login you must first select the company that you want to manage. If you’re involved with a single company, you can

request access based on your role. If you're involved with more than one company, you can request access based on your specific role for each company for which you provide services.

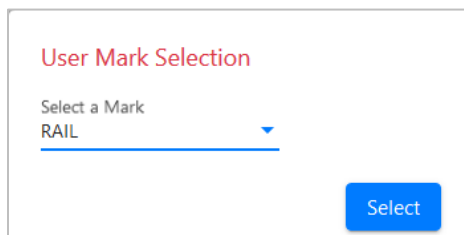
**Note:** After selecting a listed company, you can only see and manage information for that selected entity until you select another company.

---

When managing more than one company, use the following procedure to select the company that you want to manage when you login:

1. Log into Loading Authority (OT-57). The **User Mark Selection** pop-up box is displayed ([Exhibit 3](#)).

**Exhibit 3. Select a Mark/Company ID**



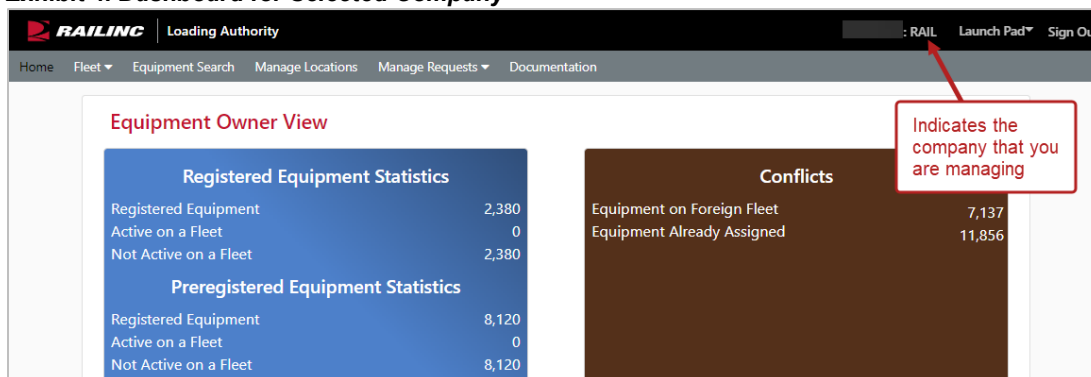
User Mark Selection

Select a Mark  
RAIL

Select

2. Select the Mark/Company ID from the drop-down list that you want to manage.
3. Select **Ok**. The Dashboard for the selected company is displayed allowing you to manage that company.

**Exhibit 4. Dashboard for Selected Company**



RAILING Loading Authority : RAIL Launch Pad Sign Out

Home Fleet Equipment Search Manage Locations Manage Requests Documentation

**Equipment Owner View**

Registered Equipment Statistics	
Registered Equipment	2,380
Active on a Fleet	0
Not Active on a Fleet	2,380

Preregistered Equipment Statistics	
Registered Equipment	8,120
Active on a Fleet	0
Not Active on a Fleet	8,120

Conflicts	
Equipment on Foreign Fleet	7,137
Equipment Already Assigned	11,856

Indicates the company that you are managing

Change the company that you are managing at any time while using Loading Authority (OT-57). Simply select the company link as indicated in Exhibit 4 and choose another company.

---

## The Dashboard

The Loading Authority (OT-57) Dashboard is displayed on the Home page immediately following a successful login to the system. From here you can perform system functions by selecting the application menu items. The Dashboard ([Exhibit 2](#)) may appear different, depending on your role. Return to the Dashboard at any time by selecting the **Home** menu item. The Dashboard provides the following sections of data:

- **Equipment Owners View** for equipment owners:

- **Registered/Preregistered Equipment Statistics** provides a summary of registered/preregistered equipment statistics. The number of registered and preregistered equipment are from the Umler system for the stenciled mark, along with the active/non-active equipment on a fleet in Loading Authority. Select a number in this section to view the details in the Equipment Search as shown in [Exhibit 5](#).
- **Conflicts** provides a summary of your company’s equipment registration conflicts. Select a number in this section to view the details in the Equipment Search, similar to [Exhibit 5](#).
- **Fleet** for fleet managers and equipment owners:
  - **Fleet Information** provides a summary of your company’s active, valid fleets and associated information.
  - **Conflicts** provides a summary of your company’s equipment registration conflicts related to fleets.
- **Equipment Requests** for all roles:
  - **Disposition Requests** provides a summary of equipment disposition requests by status and role.
  - **Transfer Requests/Pending Timeline** provides a summary of equipment transfer requests by status and role and pending timeline by number of days for submitted and incoming requests.

**Exhibit 5. Statistic Details**

Equipment Search

ALHX001000-002000

Enter valid equipment separated by a comma or whitespace. Ranges are supported (Ex: AARX1-100, AARX1-AARX100).  
Click the "Search" button or Shift + Enter to search.

Download Search

Search Results: 1001 0 selected Actions

<input type="checkbox"/>	Equipment ID	Fleet Name	Controlling Entity	Primary Contact	Primary P...	Primary Email	Primary Storage
<input type="checkbox"/>	ALHX_001000	AWS_Dougs_Fleet	GENERAL AMERICAN MARKS COMPANY				CREWS - LAMAR, AL - AAA COOPER TRA...
<input type="checkbox"/>	ALHX_001001	AWS_Dougs_Fleet	GENERAL AMERICAN MARKS COMPANY				This equipment is not currently in Umler.
<input type="checkbox"/>	ALHX_001002	AWS_Dougs_Fleet	GENERAL AMERICAN MARKS COMPANY				CREWS - LAMAR, AL - AAA COOPER TRA...
<input type="checkbox"/>	ALHX_001003	AWS_Dougs_Fleet	GENERAL AMERICAN MARKS COMPANY				CREWS - LAMAR, AL - AAA COOPER TRA...
<input type="checkbox"/>	ALHX_001004	AWS_Dougs_Fleet	GENERAL AMERICAN MARKS COMPANY				This equipment is currently inactive in U...
<input type="checkbox"/>	ALHX_001005	AWS_Dougs_Fleet	GENERAL AMERICAN MARKS COMPANY				CREWS - LAMAR, AL - AAA COOPER TRA...
<input type="checkbox"/>	ALHX_001006	AWS_Dougs_Fleet	GENERAL AMERICAN MARKS COMPANY				This equipment is not currently in Umler.
<input type="checkbox"/>	ALHX_001007	AWS_Dougs_Fleet	GENERAL AMERICAN MARKS COMPANY				Equipment is not currently on a fleet.
<input type="checkbox"/>	ALHX_001008	AWS_Dougs_Fleet	GENERAL AMERICAN MARKS COMPANY				Equipment is not currently on a fleet.
<input type="checkbox"/>	ALHX_001009	AWS_Dougs_Fleet	GENERAL AMERICAN MARKS COMPANY				CREWS - LAMAR, AL - AAA COOPER TRA...
<input type="checkbox"/>	ALHX_001010	AWS_Dougs_Fleet	GENERAL AMERICAN MARKS COMPANY				CREWS - LAMAR, AL - AAA COOPER TRA...

# Fleets

Fleet managers have the ability to create and manage fleets. Fleets are created and managed to register private equipment per [Circular OT-57](#) with controlling entities and with equipment contact information and storage locations. Fleet information provides railroads with the needed contact and empty destination information for private equipment. By providing valid contact and storage information in the fleet information section, private rail equipment can be effectively managed when traveling on a railroad’s line.

## Creating Fleets

Four components are required to complete a fleet in a new Loading Authority: Fleet Name, Controlling Entity Contacts, Storage Location(s) and Equipment ID(s).

1. From the Home page, select **Fleet > Create Fleet** from the menu bar. The Create Fleet page is displayed.

**Exhibit 6. Create Fleet**

**Create Fleet**

Fleet Name \* Fleet Description 0 / 250 characters  
0 / 50 characters

---

**Controlling Entities \***  
 Designate a *required primary contact* by clicking a radio button. Select optional secondary contacts by highlighting the rows. If you do not see the contact(s) you are looking for, please visit [FindUs.Rail](#). Enter Company ID

Name	Company	Phone	Email	Primary Contact
...	RAILINC CORPORATION	...	...	<input checked="" type="radio"/>
...	RAILINC CORPORATION	...	...	<input type="radio"/>

---

**Storage Locations \***  
 Designate a *required primary storage location* by clicking a radio button. Select optional secondary storage locations by highlighting the rows. If you do not see the storage location(s) you are looking for, please visit the [Manage Locations](#) page. [Manage Locations](#)

Location Name	Delivery Carrier	Destination	Primary Location
...	CN	Chinook - AB - TARGET PRODUCTS LTD	<input type="radio"/>
...	CSXT	Ayden - NC - RAILINC CORP	<input type="radio"/>
...	CSXT	Folck - NC - RAILINC CORPORATION	<input type="radio"/>
...	BNSF	Burleigh - ND - ME CARTER OF JONESBORO INC	<input type="radio"/>
...	BNSF	Texas City - TX - TARKETT INC	<input type="radio"/>
...	BNSF	El Paso 1m Ex - TX - TEXAS UTILITIES SERVICES COMPANY LLC	<input type="radio"/>

---

**Alternate Empty Waybill Instructions (Optional)**

Delivery Carrier   FSAC Station   SPLC   CIF

2. Complete the following fields (required are marked with an asterisk (\*)):
  - a. **Fleet Name**
  - b. **Fleet Description** (optional)

- c. **Controlling Entities** – designate primary and secondary contacts. These are the contacts to be called with questions about routing the cars. Enter a **Mark** or **Company ID** to pull in controlling entities. If you do not see the contacts you’re looking for visit [FindUs.Rail](#).
    - Select a primary contact by clicking a radio button.
    - Select one or more optional secondary contacts by highlighting the rows (optional).
  - d. **Storage Locations** – designate primary and secondary locations for the cars. If you don’t see the location you’re looking for, see [Managing Locations](#).
    - Select a primary location by clicking a radio button.
    - Select one or more optional secondary locations by highlighting the rows (optional).
3. **Alternate Empty Waybill Instructions** – this section will be available in a future phase.
  4. When all required fields have been entered, the **Save & Continue** button becomes available to select. Select **Save & Continue**. See [Adding Equipment to a Fleet](#) to continue.

## Managing Fleets

Manage a fleet by selecting **Fleet > Manage Fleets** from the menu bar. Select the fleet name.

**Exhibit 7. Manage Fleets**

Fleet Id	Fleet	Company	Primary Contact	Storage Location	Number of Equipment	Fleet Status
482	ADMX	ADM TRANSPORTATION COMPANY		PRIMARY	26756	First Warning
8879	SoonSuspendedFleet1	ADM TRANSPORTATION COMPANY		PRIMARY	9	Second Warning
8880	SoonSuspendedFleet2			PRIMARY	56	Suspended
8881	SoonSuspendedFleet3	RAILINC CORPORATION		PRIMARY	22	Suspended
8882	SoonSuspendedFleet4			PRIMARY	46	Suspended
8901	SoonSuspendedFleet11	ADM TRANSPORTATION COMPANY		PRIMARY	0	Active
8959	SoonSuspendedFleet4			PRIMARY	853	Suspended
9203	testing fleet			SECONDARY	1	Suspended
9223	testing fleet	ADM TRANSPORTATION COMPANY		PRIMARY	1	Third Warning
9555	Testing Suspension1			PRIMARY	4	Suspended

### Warning Status

Fleets in the **First Warning**, **Second Warning** or **Third Warning** status are in danger of suspension. When you select the fleet from the **Manage Fleets** table, the full details of the fleet are displayed, including the number of days until suspension:

- **First Warning** means the fleet will be suspended in 30-15 days.
- **Second Warning** means the fleet will be suspended in 14-8 days.
- **Third Warning** means the fleet will be suspended in 7 or less days.

**Exhibit 8. Fleet Needs Verification**

This Fleet is scheduled for suspension in 17 days.

20191203 Fleet

---

Last Verified: 2019/12/05 09:18 AM

Confirm Fleet
Delete Fleet
Save Fleet

Scroll to the bottom and select the **Confirm Fleet** button to confirm that you have verified the fleet. Selecting this button confirms verification, activates the fleet for another 11 months and updates the **Last Verified** date to the current date. The status is updated to **Active**.

See [Editing Fleet Information](#) and [Deleting a Fleet](#) for details on saving and deleting fleets.

## Suspended Status

Fleets in **Suspended** status are no longer valid, including the equipment registered to the suspended fleets. When you select the fleet from the **Manage Fleets** table, the full details of the fleet are displayed, including the last verified date at the bottom of the page.

**Exhibit 9. Fleet Suspended Due to Inactivity**

**This Fleet Has Been Suspended.**  
Inactive for 12 or more months.

i Select the Confirm Fleet button at the bottom of the page to reactivate.

Railinc Fleet #5

---

Last Verified: 2019/11/15 08:50 AM

Confirm Fleet
Delete Fleet

When a fleet has been inactive for 12 or more months, to activate the fleet, scroll to the bottom and select the **Confirm Fleet** button. Selecting this button activates the fleet for another 11 months and updates the **Last Verified** date to the current date. The status is updated to **Active**.

**Exhibit 10. Fleet Suspended Due to Missing Primary Contact**

**This Fleet Has Been Suspended.**  
Missing Primary Contact.

i Select the Confirm Fleet button at the bottom of the page to reactivate.

TILX Fleet 123

Equipment in Conflict 45

Equipment not in Umler 0

Notice

This fleet has no registered controlling entity contacts. You will need to add contacts before saving the fleet. You can also go to FindUs.Rail to register contacts for your company and then return to this application to update this fleet.

Continue to the current page
Go to FindUs.Rail

When a fleet is suspended due to missing contacts, you'll need to update the registered controlling entity contacts.

1. All contacts for your company must be registered in FindUs.Rail before you can add them to the application and update the fleet. To register contacts, select the **Go to FindUs.Rail** button (see [Appendix A. Adding OT-57 Contacts to FindUs.Rail](#) for details).
2. Once your company’s contact information is registered in FindUs.Rail, select **Continue to the current page** button.
3. In the **Controlling Entities** section, enter your company ID in the **Enter Company ID** field and click the arrow icon.

**Exhibit 11. Add Primary Contact**

**Controlling Entities \***

Update your contacts using the form below. Use the radio buttons to change the primary contact. Use row selections to update choices for secondary contacts. When you have made your changes, save them using the button above. If you do not see the contact(s) you are looking for, please visit FindUs.Rail.

Enter Company ID  
TILX

Name	Company	Phone	Email	Primary Contact
	TRINITY INDUSTRIES LEASING COMP...			<input type="radio"/>
	TRINITY INDUSTRIES LEASING COMP...			<input type="radio"/>
	TRINITY INDUSTRIES LEASING COMP...			<input type="radio"/>

4. Select a **Primary Contact** by clicking inside the radio button for the name you want to select.
5. Scroll to the bottom and select the **Confirm Fleet** button. Selecting this button activates the fleet and updates the **Last Verified** date to the current date. The status is updated to **Active**.

See [Deleting a Fleet](#) for details on deleting fleets.

## Adding Equipment to a Fleet

Loading Authority OT-57 provides the ability to enter up to 50,000 pieces of equipment at a time by upload or manual entry.

**Exhibit 12. Add Equipment by CSV Upload or Manual Entry**

**Add Equipment**  Switch to Text Input Return to fleet

Add Equipment via CSV Upload

Select File

*Requirements for CSV file uploads:*

1. Download the template to see the required format. Note that the values do not use quotes.
2. Enter equipment data underneath the column headers. If using an existing CSV, make sure it follows the same format.
3. Filenames must end in ".csv", and can contain only letters, numbers, underscores and hyphens. No spaces or apostrophes.
4. The file size must be less than 730KB in size.
5. Use the Select File button to choose the file to be uploaded.
6. Press the Upload button to submit the equipment data to Railinc.

**Add Equipment**  Switch to CSV Upload Return to fleet

**Add Equipment via Text Input**

Add Equipment\*

---

Enter valid equipment separated by a comma or whitespace. Ranges are supported (Ex: AARX1-100, AARX1-AARX100).

Clear Add Equipment

1. **Add Equipment via CSV Upload** – this is the default page for adding equipment
  - Download the template file by clicking the **Download Template** link. Save it to your local machine.
  - Enter the appropriate equipment data underneath the column headers. The file size must be less than 730 KB to upload it.
  - Use the **Select File** button to choose the modified file and select it.
  - Select the **Upload** button to upload the file.
2. **Add Equipment via Text Input** – click on the **Switch to Text Input** toggle button to manually enter equipment
  - Enter equipment in the **Add Equipment** field as a range or delimited by commas or spaces and select the **Add Equipment** button.
  - You can skip this step by selecting the **Return to Fleet** button, but you'll need to add equipment before your fleet can be saved.

---

**Note:** When equipment on an active fleet is restenciled in Umler and the new equipment ID is not already listed on a fleet in Loading Authority, then the new equipment ID will be added to the Prior ID's fleet when it becomes active. The affected fleet manager will be notified of the update via email if this occurs.

---

## Managing Conflicts

The Fleet summary page shows any equipment that is in conflict, including **Equipment not in Umler**, **Equipment on another fleet** and **Equipment already assigned**. The fleet summary page provides you with information to help manage your equipment.

Exhibit 13. Fleet Summary Example

The screenshot displays a web interface for fleet management. At the top, a yellow banner indicates 'Equipment add completed, here is a summary of the results' with statistics: 'Valid - 457', 'Not in Umler - 30', 'Conflict On Another Fleet - 83', 'Conflict On Own Fleet - 19', and 'Invalid Equipment - 155'. Below this, the '20191120a Fleet' is shown with three columns: 'Equipment not in Umler' (listing items like ACFX 08670, ACFX 08740, etc.), 'Equipment on another fleet' (listing items like ADKX 88180, ADKX 48140, etc.), and 'Equipment already assigned' (listing items like SHGX 30327, TAFX 30369, etc.). A 'Manage Fleets' button is in the top right. Below the conflict sections is an 'Equipment Listing' table with columns for equipment IDs and actions like '+ Add Equipment', '- Remove Equipment', 'Replace All Equipment', and 'Download Equipment CSV'. The listing includes rows of equipment IDs such as ACFX 036944, ACFX 036970, etc. Below the listing are sections for 'Controlling Entities' and 'Storage Locations', each with a table of details and a 'Display All' button. At the bottom, there are search fields for 'Delivery Carrier', 'FSAC Station', 'SPLC', and 'CIF', along with 'Delete Fleet' and 'Save Fleet' buttons.

1. **Equipment in Conflict** – this is equipment that may need to be added to Umler or may be part of another fleet or another company may have your equipment assigned to another fleet. Unless fixed, equipment in the Equipment in Conflict sections will not be saved to your fleet. Only equipment that appears in the **Equipment Listing** section will be saved to your fleet.
  - a. **Equipment not in Umler**
    - As needed, update your equipment in Umler and then select the blue refresh icon for an update of the list.
    - Select the red trash icon to remove conflicts in this section.

- b. **Equipment on another fleet**
    - As needed, transfer equipment back to your company by contacting the equipment owner and then select the blue refresh icon for an update of the list.
    - To transfer equipment that is part of another fleet to your fleet, select the green transfer button to initiate the transfer request. For details, see [Requesting Equipment Transfer](#).
    - Select the red trash icon to remove conflicts in this section.
  - c. **Equipment already assigned**
    - Select equipment to move them from another fleet to the current fleet and then select the blue arrow icon.
    - Select equipment and the red trash icon to remove equipment in this section.
2. **Equipment Listing**
    - Equipment appearing in this section has no conflicts and will be automatically saved to the fleet.
  3. **Add Equipment** button: Select this button to [Adding](#) Equipment to a Fleet.
  4. **Remove Equipment** button: Select this button to the [Removing Equipment](#).
  5. **Replace All Equipment** button: Select this button to [Replacing All](#) Equipment.
  6. **Download Equipment CSV** button: Select this button to download the list appearing in Equipment Listing. The list of equipment initials and numbers can be saved as a .csv file.
  7. **Delete Fleet** button: Select this button to [Deleting a Fleet](#).
  8. **Save Fleet** button: When updates are made to the **Fleet Name, Fleet Description, Controlling Entities** and/or **Storage Locations**, select the **Save Fleet** button to save your updates. For **Equipment in Conflict** sections, Loading Authority automatically saves any updates to these lists.

## Editing Fleet Information

When one or more updates are made to the **Fleet Name, Fleet Description, Controlling Entities** and/or **Storage Locations**, select the **Save Fleet** button to save your updates.

1. Update any of the following fields (required are marked with an asterisk (\*)):
  - a. **Fleet Name**
  - b. **Fleet Description** (optional)
  - c. **Controlling Entities** – designate primary and secondary contacts. These are the contacts to be called with questions about the cars. Enter a **Mark** or **Company ID** to pull in controlling entities. If you do not see the contacts you're looking for visit [FindUs.Rail](#).
    - Select a primary contact by clicking a radio button.
    - Select one or more optional secondary contacts by highlighting the rows (optional).
  - d. **Storage Locations** – designate primary and secondary locations for the cars. If you don't see the location you're looking for, see [Managing Locations](#).

- Select a primary location by clicking a radio button.
  - Select one or more optional secondary locations by highlighting the rows (optional).
2. **Alternate Empty Waybill Instructions** – this section will be available in a future phase.
  3. Select **Save Fleet**.

**Exhibit 14. Edit Fleet Information**

Fleet Name \*  
20191122 Fleet1 15 / 50 characters

Fleet Description  
Testino fleet updates 21 / 250 characters

**Controlling Entities \***

Update your contacts using the form below. Use the radio buttons to change the primary contact. Use row selections to update choices for secondary contacts. When you have made your changes, save them using the button above. If you do not see the contact(s) you are looking for, please visit FindUs.Rail. Enter Company ID

Name	Company	Phone	Email	Primary Contact
	RAILINC CORPORATION			<input checked="" type="radio"/>
	RAILINC CORPORATION			<input type="radio"/>

**Storage Locations \***

Use the radio buttons to change the *required primary storage location*. Select optional secondary storage locations by highlighting the rows. You can view all of the currently available locations using the *Display All* button. If you do not see the storage location(s) you are looking for, please visit the Manage Locations page. [Display All](#)

Location Name	Delivery Carrier	Destination	Primary Location
Michelle's Storage Location	CN	Chinook - AB - TARGET PRODUCTS LTD	<input checked="" type="radio"/>
Michelle's Location	CSXT	Ayden - NC - RAILINC CORP	<input type="radio"/>

**Alternate Empty Waybill Instructions (Optional)**

Delivery Carrier  FSAC Station  SPLC  CIF

Delete Fleet
Save Fleet

## Removing Equipment

To remove equipment:

1. Enter equipment in the **Remove Equipment** field as a range or delimited by commas or spaces.
2. Select **Remove Equipment** to remove the equipment you have entered or **Clear** to clear your entry.
3. Select **Proceed** to confirm removing equipment or **Cancel** to cancel.
4. Select **Return to fleet** to return to your fleet summary.

**Exhibit 15. Remove Equipment**

Remove Equipment Return to fleet

Remove Equipment via Text Input

Remove Equipment\*

Enter valid equipment separated by a comma or whitespace. Ranges are supported (Ex: AARX1-100, AARX1-AARX100).

Clear Remove Equipment Return to fleet

**Replacing All Equipment**

To replace all equipment that is currently listed for your fleet:

1. Enter equipment in the **Replace Equipment** field as a range or delimited by commas or spaces.
2. Select **Replace Equipment** to replace all equipment for the fleet or **Clear** to clear your entry.
3. Select **Proceed** to confirm replacing all equipment with your entry or **Cancel** to cancel.
4. Select **Return to fleet** to return to your fleet summary.

**Exhibit 16. Replace Equipment**

Replace Equipment Return to fleet

Replace Equipment via Text Input

Replace Equipment\*

Enter valid equipment separated by a comma or whitespace. Ranges are supported (Ex: AARX1-100, AARX1-AARX100).

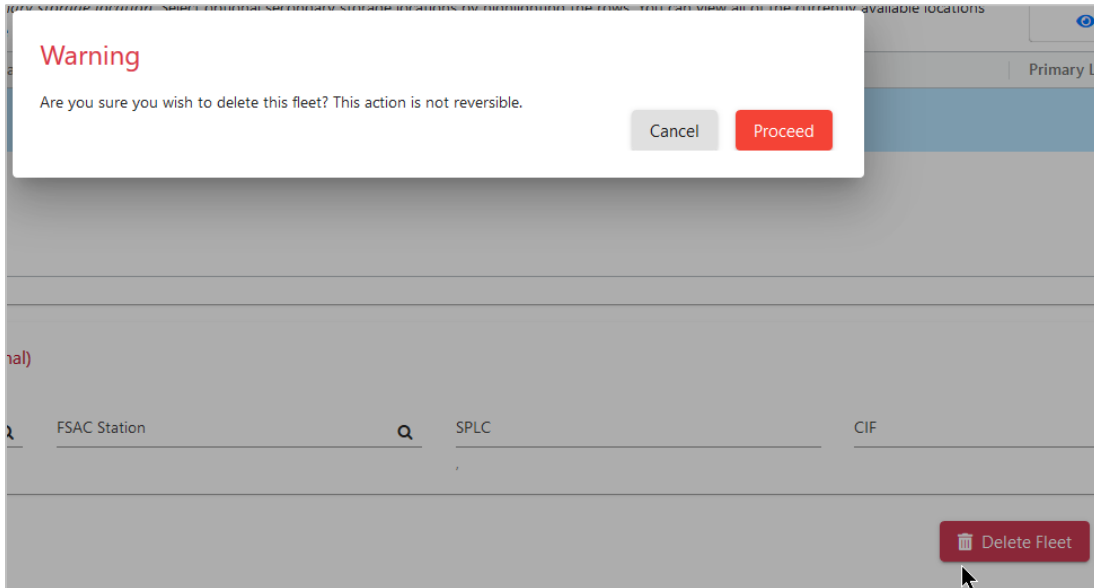
Clear Replace Equipment Return to fleet

## Deleting a Fleet

To delete a fleet:

1. Select the **Delete Fleet** button at the bottom of your fleet summary.
2. Confirm that you want to delete the fleet by selecting the **Proceed** button, otherwise select **Clear** to cancel the delete.

**Exhibit 17. Delete Fleet**

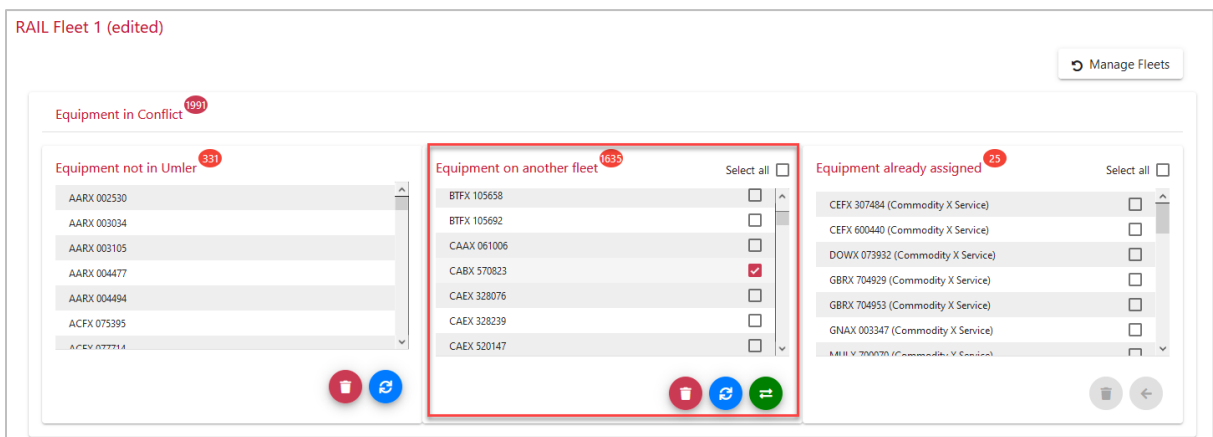


## Requesting Equipment Transfers

To transfer equipment that is part of another fleet to your fleet:

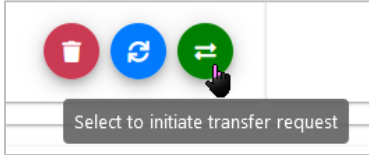
1. In the **Equipment on another fleet** section of your fleet’s summary page (Exhibit 13), select the equipment that you want transferred to your fleet.

**Exhibit 18. Transfer Equipment**



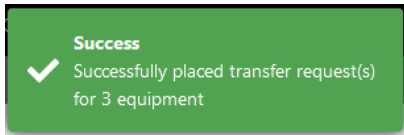
2. Select the blue button to verify the equipment is still on another controlling entity’s fleet.
3. Select the green transfer button to initiate the transfer request.

**Exhibit 19. Equipment on Another Fleet Action Buttons**



4. A success message will confirm that you have placed a transfer request and the amount of equipment selected.

**Exhibit 20. Equipment Request Success Message**



5. The **Equipment Requests** section of the **Home** page will be updated with the amounts of all the existing equipment requests and statuses for your MARK. The three requests submitted above are shown in the example below in the **Submitted** row under the **Pending** column.

**Exhibit 21. Equipment Transfer Request on the Home Page**

Equipment Requests			
Transfer Requests			
	Pending	Escalated	Closed
Submitted	3	0	2
To Fleet Manager	32	17	131
To Equipment Owner	0	0	0

For more details about transfer requests, see [Managing Transfer Requests](#).

## Equipment Search

The Equipment Search allows users to search for up to 10,000 pieces of equipment.

- **Equipment owners** can search and download a list of equipment that they own and remove it from its current fleet.
- **Railroad users** can search and download a list of equipment that they possess and request disposition.
- **Fleet managers** can search equipment and download a list of equipment that is assigned to their fleets. For equipment that isn't in one of their fleets, an error message will show the information is confidential.

To search equipment:

1. Select **Equipment Search** from the main menu.
2. Enter equipment in the **Equipment Search** field as a range or delimited by commas or spaces.
3. Select **Search** to view search results or **Download** to download the search results to a .csv file.

### **Exhibit 22. Equipment Search**



The screenshot shows a web interface for "Equipment Search". At the top, the title "Equipment Search" is displayed in red. Below it is a text input field with the placeholder text "Enter Equipment IDs". Underneath the input field is a horizontal line, and below that is a small text note: "Enter valid equipment separated by a comma or whitespace. Ranges are supported (Ex: AARX1-100, AARX1-AARX100). Click the 'Search' button or Shift + Enter to search." To the right of the input field are two buttons: a "Download" button with a download icon and a "Search" button with a magnifying glass icon.

# Equipment Owners

As an equipment owner, the **Search Results** page provides you the ability to remove equipment from its current fleet.

**Exhibit 23. Equipment Search Results – Equipment Owners View**

The screenshot shows the 'Equipment Search' interface. At the top, there is a search input field containing several TILX IDs. Below the input field is a search button and a 'Download' button. The main area displays 'Search Results: 36/36' and a table with columns: Equipment ID, Fleet Name, Controlling Entity, Primary Contact, Primary Ph..., Primary Email, and Primary Storage. A dropdown menu is open over the table, showing '36 selected' and 'Actions' with options for 'Request Disposition' and 'Remove Equipment'.

Equipment ID	Fleet Name	Controlling Entity	Primary Contact	Primary Ph...	Primary Email	Primary Storage
BNGX 030940	Bunge US Hoppers	BUNGE NORTH AMERICA INC	John Smith	(877) 724-5462	john.smith@railinc.com	COTTAGE GROVE - UNION, IN - INDIANA EA...
BNGX 031071	Bunge US Hoppers	BUNGE NORTH AMERICA INC	John Smith	(877) 724-5462	john.smith@railinc.com	COTTAGE GROVE - UNION, IN - INDIANA EA...
BNGX 032271	Bunge US Hoppers	BUNGE NORTH AMERICA INC	John Smith	(877) 724-5462	john.smith@railinc.com	COTTAGE GROVE - UNION, IN - INDIANA EA...
BNGX 032201	Bunge US Hoppers	BUNGE NORTH AMERICA INC	John Smith	(877) 724-5462	john.smith@railinc.com	COTTAGE GROVE - UNION, IN - INDIANA EA...
BRAX 008875		Equipment is not currently on a fle...	Janet Johnson (Owner)			
BRGX 001131		Equipment is not currently on a fle...	Janet Johnson (Owner)			
TILX 002723	AWSNov9Fleet	GENERAL AMERICAN MARKS COM...	John Smith	(877) 724-5462	john.smith@railinc.com	WHITTIER - VALDEZ-CORDOVA, AK - AAA CO...
TILX 002733	AWSNov9Fleet	GENERAL AMERICAN MARKS COM...	John Smith	(877) 724-5462	john.smith@railinc.com	WHITTIER - VALDEZ-CORDOVA, AK - AAA CO...
TILX 002734	AWSNov9Fleet	GENERAL AMERICAN MARKS COM...	John Smith	(877) 724-5462	john.smith@railinc.com	WHITTIER - VALDEZ-CORDOVA, AK - AAA CO...
TILX 003269	AWSNov9Fleet	GENERAL AMERICAN MARKS COM...	John Smith	(877) 724-5462	john.smith@railinc.com	WHITTIER - VALDEZ-CORDOVA, AK - AAA CO...
TILX 005771		GENERAL AMERICAN MARKS COM...		(312) 621-6604	john.smith@railinc.com	WHITTIER - VALDEZ-CORDOVA, AK - AAA CO...
TILX 006182		GENERAL AMERICAN MARKS COM...		(312) 621-6604	john.smith@railinc.com	WHITTIER - VALDEZ-CORDOVA, AK - AAA CO...

To request disposition, see [Requesting Disposition](#).

To remove equipment from its current fleet:

1. Select all checkboxes by selecting the checkbox at the top of the first column or select individual checkboxes for the equipment you want to remove. Once one or more checkboxes are selected, the **Actions** drop-down list appears at the top right of the table.
2. Select **Actions** and select **Remove Equipment**.
3. Select **Proceed** to confirm removing the selected equipment or **Cancel** to cancel.

**Exhibit 24. Equipment Search Remove Confirmation – Equipment Owners View**

The screenshot shows a 'Warning' dialog box with the text: 'Are you sure you wish to remove ( 34 ) equipment from their current fleet(s)?'. There are 'Cancel' and 'Proceed' buttons. In the background, the search results table is visible with '34 selected' and 'Actions' dropdown.

To view [fleet history details](#) of an Equipment ID:

1. From the Search Results page ([Exhibit 23](#)), select the **Equipment ID** link in the first column for the car you want to review. The Equipment History for the car pop-up displays, showing the car’s fleet history with effective and expiration timestamps and status.

**Exhibit 25. Equipment History for an Equipment ID – Equipment Owners View**

Equipment History for GATX 002815

[Download to CSV](#)

Fleet ID	Fleet Name	Fleet Description	Mark/Company ID	Equipment Effective Tim...	Equipment Expiration Ti...	Equipment Status
584	*Confidential*	*Confidential*	*Confidential*	2019-12-18 14:00:59	2019-12-18 14:08:06	VALID
1494	*Confidential*	*Confidential*	*Confidential*	2020-01-06 15:43:05	2021-11-02 13:24:47	VALID
8579	Test Fleet 1		GATX	2023-03-27 14:07:11	2024-03-27 00:01:00	VALID
8579	Test Fleet 1		GATX	2024-03-27 00:01:01	2024-05-03 15:39:18	ON_SUSPENDED_FLEET
8579	Test Fleet 1		GATX	2024-05-03 15:41:26	9999-12-31 23:59:59	VALID
8579	Test Fleet 1		GATX	2022-01-25 00:01:09	2023-03-27 14:07:10	ON_SUSPENDED_FLEET
8999	*Confidential*	*Confidential*	*Confidential*	2023-06-26 15:20:01	9999-12-31 23:59:59	ON_FOREIGN_FLEET
8579	Test Fleet 1		GATX	2021-12-22 11:25:47	2022-01-25 00:01:00	VALID

2. Select the **Download to CSV** button to download the fleet history.
3. Data will vary depending on your role and some information might be marked as confidential. For example, if you are an equipment owner and you do not own the car, then the information is marked as Confidential.
  - Equipment Owners can view any information for their own cars.
  - Fleet Managers can view their own fleet information.
  - Railroads can view information about cars in their possession.

# Railroad Users

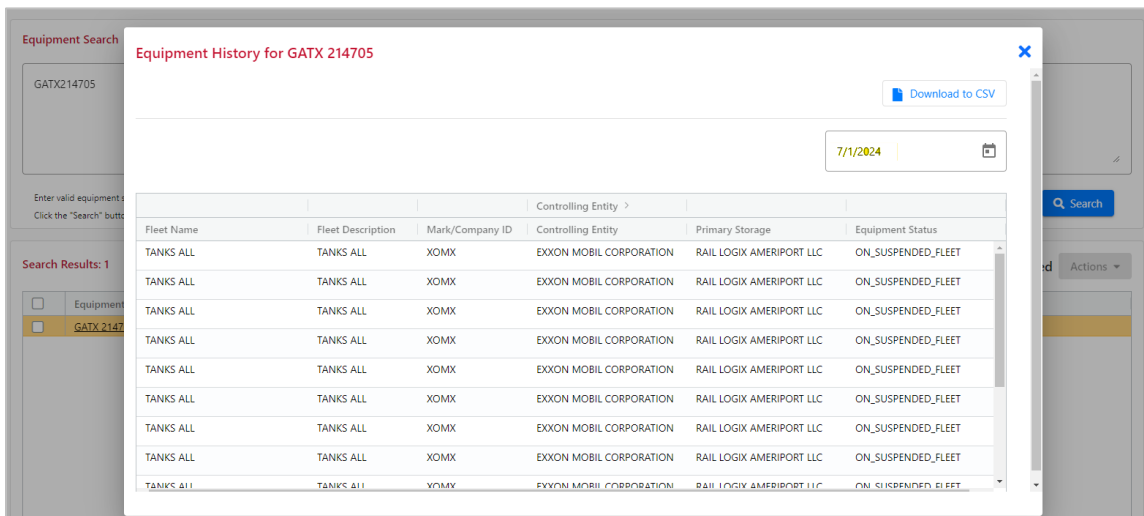
As a railroad user, the **Search Results** provides you with the ability to search and download equipment in your possession. When equipment is not in your possession, a message appears next to the equipment ID as pictured below. For equipment that is not assigned to a fleet, a message appears next to the equipment ID with the primary equipment owner listed in FindUs.Rail.

**Exhibit 26. Equipment Search Results – Railroad User View**



Select the **Equipment ID** link in the first column for the car you want to review. The Equipment History for the car displays, showing the car’s fleet history and status. Railroads can view information about cars in their possession. Select the Calendar icon in the top right to choose a different date.

**Exhibit 27. Equipment History – Railroad User View**

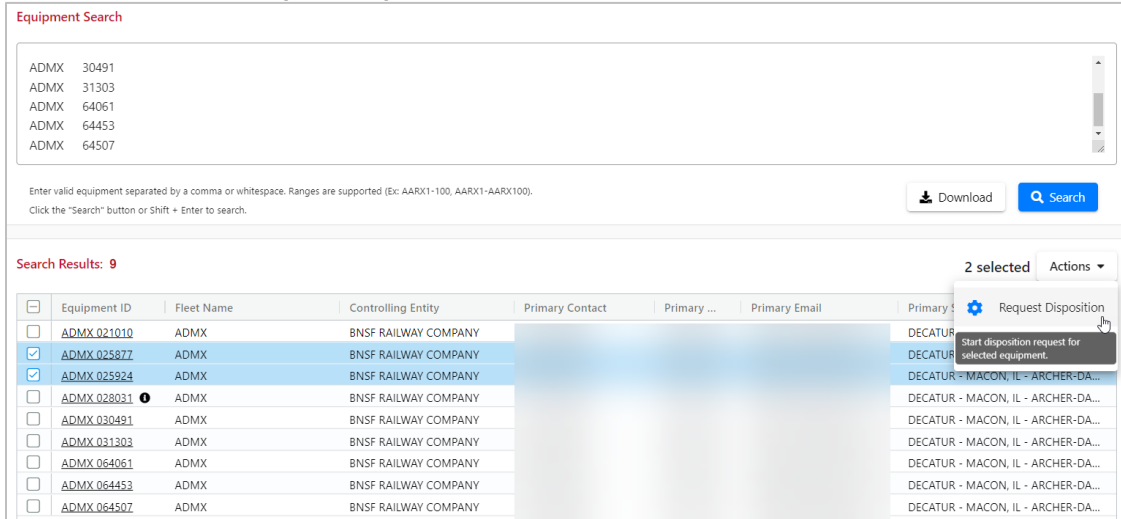


# Requesting Disposition

When there is no billing instruction or a receiver/loader is unwilling to accept or rejects a car, railroads may choose the option of sending a private car to its storage location. This is called disposition. Railroads notify the car’s controlling entity of the disposition of their car through the following process:

1. From the **Search Results**, select one or more rows by clicking inside the checkbox in the first column.

**Exhibit 28. Railroads Request Disposition**



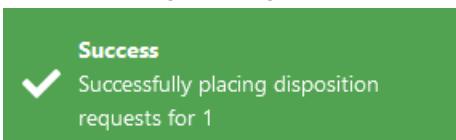
2. From the **Actions** drop-down list, select **Request Disposition**.
3. The **Request Disposition** pop-up is displayed. Enter a comment (optional) and select **Submit**.

**Exhibit 29. Submit Request Disposition**



4. A success message will confirm that you have created a disposition request for the amount of equipment selected and you’ll receive an email notification.

**Exhibit 30. Request Disposition Success Message**




## Equipment Search

---

5. All equipment in the disposition state is marked on the Search Results page with an informational icon next to the equipment ID.

**Exhibit 31. Equipment in Disposition**

<input type="checkbox"/>	Equipment ID	Fleet Name
<input type="checkbox"/>	<a href="#">ADMX 021010</a>	ADMX
<input type="checkbox"/>	<a href="#">ADMX 025877</a>	ADMX
<input type="checkbox"/>	<a href="#">ADMX 025924</a>	ADMX
<input type="checkbox"/>	<a href="#">ADMX 028031</a>	ADMX
<input type="checkbox"/>	 This equipment is in disposition state	ADMX
<input type="checkbox"/>	<a href="#">ADMX 064061</a>	ADMX

6. On the Home page, the dashboard shows an increase in the amount of pending Disposition Requests.

**Exhibit 32. Disposition Requests on the Dashboard**

Equipment Requests

	Disposition Requests			
	Pending	Escalated	Final Notice	Closed
Fl. Manager	0	0	0	0
Railroad	1	1	0	56
Eq. Owner	0	0	0	0

7. See [Managing Disposition Requests](#) to validate and add comments to your disposition request.

# Fleet Managers

As a fleet manager, you have the ability to search and download equipment that is assigned to your fleets. For equipment that isn't in one of your fleets, a message appears next to the equipment ID.

**Exhibit 33. Equipment Search Results – Fleet Managers View**

**Equipment Search**

GBRX 714367  
TILX 550307  
TILX 550308  
TILX 550309  
TILX 550310

Enter valid equipment separated by a comma or whitespace. Ranges are supported (Ex: AARX1-100, AARX1-AARX100).  
Click the "Search" button or Shift + Enter to search.

Download
Search

---

**Search Results: 6** 0 selected Actions ▾

Equipment ID	Fleet Name	Controlling Entity	Primary Contact	Primary P...	Primary Email	Primary Storage
<a href="#">GBRX 714367</a>	Testing Suspension6	ADM TRANSPORTATION COMPANY				DECATUR - MACON, IL - ARCHER-DANIEL...
<a href="#">TILX 550306</a>	Testing Suspension6	ADM TRANSPORTATION COMPANY				DECATUR - MACON, IL - ARCHER-DANIEL...
<a href="#">TILX 550307</a>	Testing Suspension6	ADM TRANSPORTATION COMPANY				DECATUR - MACON, IL - ARCHER-DANIEL...
<a href="#">TILX 550308</a>	Testing Suspension6	ADM TRANSPORTATION COMPANY				DECATUR - MACON, IL - ARCHER-DANIEL...
<a href="#">TILX 550309</a>	Testing Suspension6	ADM TRANSPORTATION COMPANY				DECATUR - MACON, IL - ARCHER-DANIEL...
<a href="#">TILX 550310</a>	Testing Suspension6	ADM TRANSPORTATION COMPANY				DECATUR - MACON, IL - ARCHER-DANIEL...

Select the **Equipment ID** link in the first column for the car you want to review. The Equipment History for the car displays, showing the car's fleet history with effective and expiration timestamps and status.

**Exhibit 34. Equipment History – Fleet Manager View**

**Equipment History for GBRX 714367** ✕

Download to CSV

Fleet ID	Fleet Name	Fleet Description	Mark/Company ID	Equipment Effective...	Equipment Expiratio...	Equipment Status
9616	Testing Suspension6		ADMX	2024-03-07 00:01:00	2024-03-07 09:43:59	ON_SUSPENDED_FLEET
9495	"Confidential"	"Confidential"	"Confidential"	2023-09-19 13:58:46	2023-11-14 14:24:01	VALID
9616	Testing Suspension6		ADMX	2023-11-14 15:06:46	2023-11-15 00:01:02	VALID
9616	Testing Suspension6		ADMX	2023-11-15 00:01:02	2023-11-15 16:09:55	ON_SUSPENDED_FLEET
9616	Testing Suspension6		ADMX	2023-11-15 16:09:55	2024-03-07 00:01:00	VALID
9616	Testing Suspension6		ADMX	2024-03-07 09:44:00	2024-03-19 12:03:23	VALID
9616	Testing Suspension6		ADMX	2024-03-19 12:05:12	9999-12-31 23:59:59	VALID

# Managing Locations

Fleet managers have the ability to manage storage locations.

To view the storage locations for your company:

1. Select **Manage Locations** from the main menu.

**Exhibit 35. Manage Storage Locations**

The screenshot shows the 'Manage Storage Locations' page. At the top, there is a 'Clear Filter' button and a status 'Number of locations: 7'. On the right, there is a blue '+ Create Storage Location' button. Below is a table with the following data:

Location Name	Delivery Carrier	Destination	Fleets	Edit
Michelle's Storage Location	CN	Chinook, AB - TARGET PRODUCTS LTD	4	
Michelle's Location	CSXT	Ayden, NC - RAILINC CORP	6	
Katie's Storage Location	CSXT	Folck, NC - RAILINC CORPORATION	3	
Katies Cars	BNSF	Burleigh, ND - ME CARTER OF JONESBORO INC	5	
Katies Storage	BNSF	Texas City, TX - TARKETT INC	7	
Test Location 1	BNSF	El Paso Im Ex, TX - TEXAS UTILITIES SERVICES COMPANY LLC	5	
New Storage Location	BNSF	Akron, CO - DNA WASHINGTON	2	

# Creating Storage Locations

To add a storage location:

1. Select **Manage Locations** from the main menu.
2. Select the + **Create Storage Location** button from the main menu.

**Exhibit 36. Create Storage Location**

The screenshot shows the 'Create Storage Location' form. It has a title 'Create Storage Location' with a close button. The form contains the following fields:

- Location Name \***: A text input field.
- Delivery Carrier \***: A dropdown menu with a search icon.
- FSAC Station \***: A dropdown menu with a search icon. Below it is the label 'Station Name'.
- SPLC \***: A dropdown menu with a search icon. Below it is the label 'County, State'.
- CIF \***: A dropdown menu with a search icon. Below it is the label 'Customer Name'.

At the bottom right, there is a 'Save Location' button with a checkmark icon.

3. All fields with an asterisk (\*) are required to save a location.
  - a. Enter the **Location Name**.
  - b. Enter or search for **Delivery Carrier, FSAC Station, SPLC** and **CIF** by selecting the search icon.

## Managing Locations

- To search, enter the minimum required characters. Select the **Search** button to search or **Clear** to clear your entries.
- Choose the appropriate row by selecting the arrow in the right column.

**Exhibit 37. Search and Select CIF**

Customer Lookup

At least partial customer name, CIF number, or city must be specified.

Customer Name: RAILINC  
Minimum 3 characters.

CIF Number: [Empty]  
Minimum 9 characters  
State/Province: [Empty]  
Select a State/Province

City: [Empty]  
Minimum 3 characters.

Entity Type: Select an Entity Type

Clear Search

Number of locations: 2 Clear Filter

CIF	Customer Name	Address	City	St/Prov, Country	Select Customer
001000617580000	RAILINC CORP	7001 WESTON PKWY STE ...	CARY	NC, US	⌵
001000617589500	RAILINC CORPORATION	7001 WESTON PKWY STE ...	CARY	NC, US	⌵

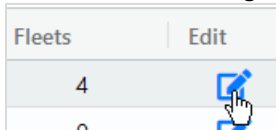
4. Once all required fields are entered, select **Save Location**.

## Editing Storage Locations

To edit an existing storage location:

1. Select **Manage Locations** from the main menu.
2. Select the **Edit icon** in the **Edit** column for the storage location you want to edit.

**Exhibit 38. Edit Storage Location Icon**



3. The **Edit Storage Location** section displays below the list of storage locations. Edit the appropriate fields.
4. Select **Save Location** to save your updated information or select **Reset** to revert your changes back to the original information.

## Exhibit 39. Edit Storage Location

The screenshot shows the 'Manage Storage Locations' interface. At the top, there is a 'Clear Filter' button and a 'Number of locations: 7' indicator. A '+ Create Storage Location' button is in the top right. Below is a table with columns: Location Name, Delivery Carrier, Destination, Fleets, and Edit. The table lists seven locations. Below the table is an 'Edit Storage Location' modal with fields for Location Name, Delivery Carrier, FSAC Station, SPLC, and CIF, along with 'Delete Location', 'Reset', and 'Save Location' buttons.

Location Name	Delivery Carrier	Destination	Fleets	Edit
Michelle's Storage Location	CN	Chinook, AB - TARGET PRODUCTS LTD	4	
Michelle's Location	CSXT	Ayden, NC - RAILINC CORP	6	
Katie's Storage Location	CSXT	Folck, NC - RAILINC CORPORATION	3	
Katies Cars	BNSF	Burleigh, ND - ME CARTER OF JONESBORO INC	5	
Katies Storage	BNSF	Texas City, TX - TARKETT INC	7	
Test Location 1	BNSF	El Paso Im Ex, TX - TEXAS UTILITIES SERVICES COMPANY LLC	5	

## Deleting Storage Locations

Storage Locations can only be deleted when no fleets are assigned to them.

To delete an existing storage location that has a zero in the Fleets column:

1. Select **Manage Locations** from the main menu.
2. Select the **Edit icon** in the **Edit** column for the storage location you want to edit ([Exhibit 38](#)).
3. Verify that you are deleting the appropriate fleet because deleting the fleet cannot be undone. Select the **Delete Location** button.
4. Select **Proceed** to confirm delete the fleet or **Cancel** to cancel.

## Exhibit 40. Edit Storage Location

The screenshot shows the 'Edit Storage Location' modal with a 'Warning' dialog box overlaid. The dialog box asks 'Are you sure you wish to delete this storage location? This action cannot be undone.' and has 'Cancel' and 'Proceed' buttons. The modal background is dimmed, showing the same fields as in Exhibit 39.

## Managing Requests

To manage disposition and transfer requests, you must have permission for your role (fleet manager, railroad and/or equipment owner) set up in Loading Authority (OT-57), and you must have your contact information listed in the Loading Authority (OT-57) category in FindUs.Rail. See [Appendix A. Adding OT-57 Contacts to FindUs.Rail](#) for details.

## Managing Disposition Requests

Fleet managers, railroads and equipment owners have the ability to add comments to disposition requests. Every time a comment is added, the railroad user, fleet manager and equipment owner are notified by email. Only railroad users can close disposition requests.

To manage disposition requests for your company:

1. Select **Manage Requests > Disposition Requests** from the main menu.
2. Add a comment to one or more disposition requests by selecting checkboxes of one or more request in the **Suspended**, **Pending**, **Escalated** or **Final Notice** tabs.

**Note:** The Suspended tab displays records for open disposition requests that are on one of the fleet manager's suspended fleets. This tab is only available to fleet managers, prompting them to either take action to confirm the fleet or move the equipment to an active fleet.

3. Select **Add Comment**. In this example the railroad is adding a second comment.

**Exhibit 41. Manage Disposition Requests – Railroad View**

The screenshot shows a web interface titled "Disposition Requests | Railroad". At the top, there are four tabs: "Pending" (with a red badge '1'), "Escalated" (with a red badge '1'), "Final Notice", and "Closed" (with a red badge '56'). Below the tabs are two buttons: "Expand/Collapse All" and "Clear Filters". On the right side, there are two icons: a refresh icon and a "Download to CSV" button. The main content is a table with the following columns: "Equipment Id", "Fleet Name", "Company M...", "Entity Mark", "Owner Mark", "Road", "Created On", "Last Updated", and "Next Update...". The first row of data is highlighted in blue and contains: "CITX 700033", "RailincDispoTes...", "C007", "C007", "CEFX", "UP", "2020-11-18", "2020-11-18", and "2020-11-23". Below the table, there are two buttons: "Add Comment" (blue) and "Close Request" (green).

4. Enter the comment and click the airplane icon on the right to submit it.

### Exhibit 42. Manage Disposition Requests – Railroad Comment

Comment History | CITX 700033

Michelle Ferrar, UP [2020-11-18 08:17]  
Please provide instructions as soon as possible.

Enter your comment here \*  
Adding another comment, urgently need response

46/200

5. In the same manner, the fleet manager should add a comment to provide the railroad with the information on where to disposition the equipment. In this example below, the fleet manager is providing the disposition information.

### Exhibit 43. Manage Disposition Requests – Fleet Manager Comment

Disposition Requests | Fleet Manager

Suspended <sup>2</sup> Pending <sup>2</sup> Escalated Final Notice

Expand/Collapse

Equipment Id

GBRX 712742

GBRX 712745

On

-20

-20

Add Comment

This comment will be applied to 1 equipment below

GBRX 712742

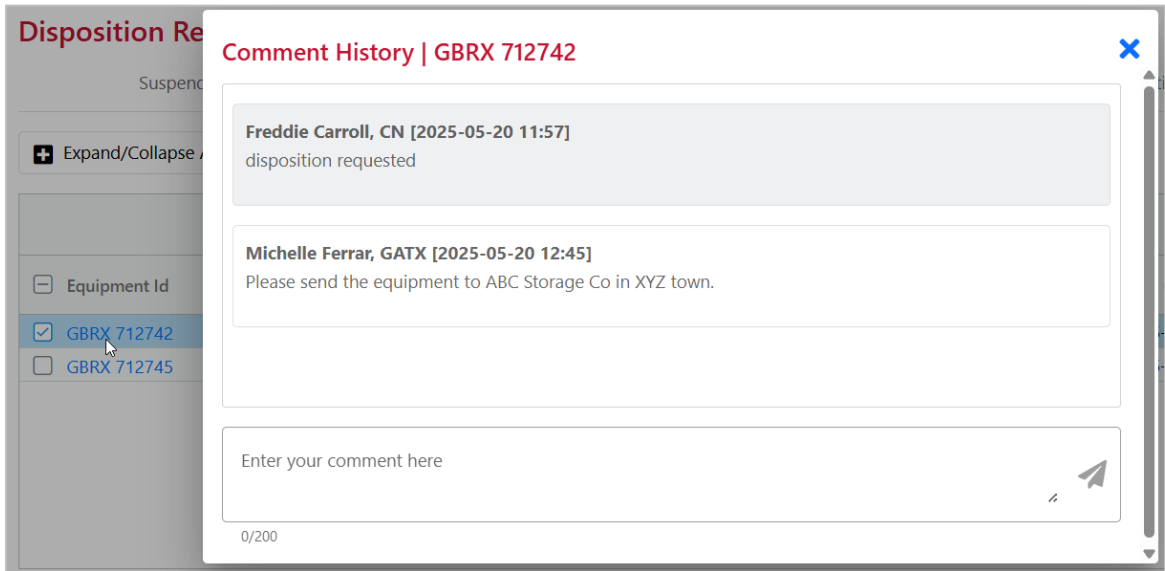
Please send the equipment to ABC Storage Co in XYZ town.

56/200

Add Comment

6. To view comment history from all, select the **Equipment ID** link.

**Exhibit 44. Manage Disposition Requests – Comment History**



Any equipment in the **Escalated** or **Final Notice** tabs that is not on a fleet or is on a suspended fleet is highlighted for equipment owners.

**Exhibit 45. Manage Disposition Requests – Escalated Tab for Equipment Owners**

The screenshot shows the 'Disposition Requests | Owner Management' interface with the 'Escalated' tab selected. The interface includes a table with columns for Equipment Id, Fleet Name, Company, Entity, Owner, Road, Created, Last Updated, and Next Up. Two rows are highlighted in yellow, representing equipment GATX 059982 and GATX 059977. The interface also features a sidebar with 'Expand/Collapse All' and 'Clear Filters' buttons, and a 'Download to CSV' button. A red notification badge with the number '2' is visible above the 'Escalated' tab.

Equipment Id	Fleet Na...	Compan...	Entity M...	Owner M...	Road	Created ...	Last Upd...	Next Up...
<input type="checkbox"/> GATX 059982	Propane Fle...	AEX	AEX	GATX	BNSF	2025-05-15	2025-05-15	2025-05-21
<input type="checkbox"/> GATX 059977	Propane Fle...	AEX	AEX	GATX	BNSF	2025-05-15	2025-05-15	2025-05-21

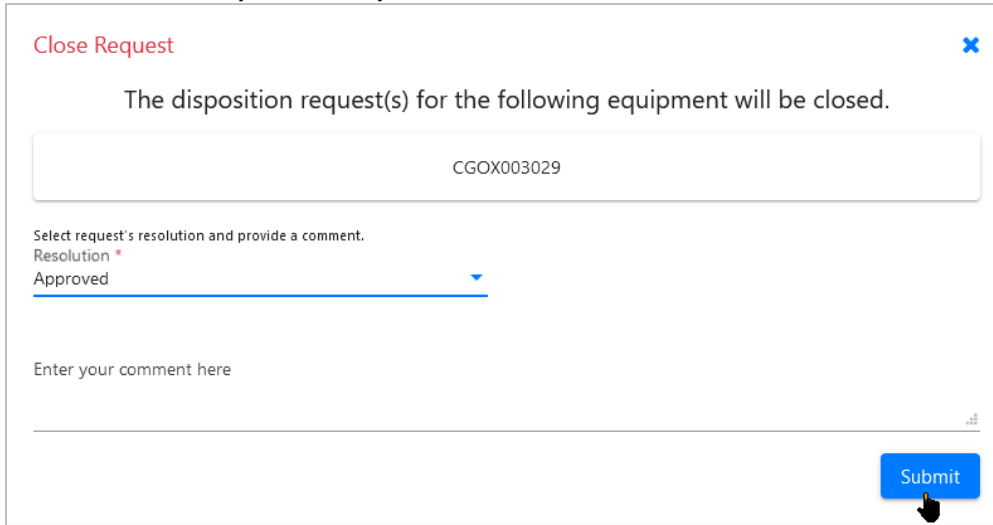
## Closing Disposition Requests

Only railroad users have the ability to close disposition requests.

1. Select **Manage Requests > Disposition Requests** from the main menu.
2. Close disposition requests by selecting the checkbox of one or more requests in the **Pending**, **Escalated** or **Final Notice** tabs.
3. Select **Close Request** ([Exhibit 41](#)).

4. The **Close Request** pop-up displays. Select the **Resolution**.

**Exhibit 46. Close Disposition Request**



When closing a request, the reasons you can select in the **Resolution** drop-down list are:

- **Approved:** Instructions have been provided and the disposition can be closed
  - **Cancelled:** User has determined that the disposition request is no longer required
5. You can enter a comment (optional). Select **Submit** to close the request.
  6. On the Home page, the dashboard shows an increase in the amount of closed Disposition Requests.

If dispositions are not closed in a timely manner, they are automatically escalated in the Loading Authority system according to the escalation process and calendar provided in [Circular OT-57](#).

When the system generates closures ([Circular OT-57](#)), the following statuses for closure also include:

- **Transferred:** Equipment on the request has been transferred to another fleet
- **Time Exceeded:** Time has been exceeded based on the schedule provided in [Circular OT-57](#)
- **Interchanged:** Equipment on the request has been interchanged to another railroad and a new disposition has been created

---

## Managing Transfer Requests

1. Manage transfers by selecting **Manage Requests > Transfer Requests** from the menu bar. The Transfer Requests | Submitted Requests page is displayed.

**Exhibit 47. Verify, Resend, Escalate or Cancel Submitted Requests**

**Transfer Requests | Submitted Requests**

Submitted Requests Pending <sup>9</sup> Escalated Closed <sup>16</sup>

Expand/Collapse All Clear Filters Download to CSV

Equipme...	Fleet Name	Company Mark	Entity Mark	Created On	Last Updated	Days Since U...	Status	Comment	
<input type="checkbox"/>	BNGX 0200...	CN Fleet for AWS	RAIL	RAIL	2023-07-13 12:...	2023-07-13 15:...	1	Verified	
<input type="checkbox"/>	BNGX 0201...	CN Fleet for AWS	RAIL	RAIL	2023-07-13 12:...	2023-07-13 13:...	1	Acknowledged	Car is being Disp...
<input checked="" type="checkbox"/>	BNGX 0200...	CN Fleet for AWS	RAIL	RAIL	2023-07-13 12:...	2023-07-13 12:...	1	Pending	
<input type="checkbox"/>	BNGX 0201...	CN Fleet for AWS	RAIL	RAIL	2023-07-13 12:...	2023-07-13 12:...	1	Pending	
<input type="checkbox"/>	BNGX 0200...	CN Fleet for AWS	RAIL	RAIL	2023-07-13 12:...	2023-07-13 12:...	1	Pending	
<input type="checkbox"/>	BNGX 0201...	CN Fleet for AWS	RAIL	RAIL	2023-07-13 12:...	2023-07-13 12:...	1	Pending	
<input type="checkbox"/>	BNGX 0200...	CN Fleet for AWS	RAIL	RAIL	2023-07-13 12:...	2023-07-13 12:...	1	Pending	
<input type="checkbox"/>	BNGX 0200...	CN Fleet for AWS	RAIL	RAIL	2023-07-13 12:...	2023-07-13 12:...	1	Pending	
<input type="checkbox"/>	ADMX 0001...	CN Fleet for AWS	RAIL	RAIL	2023-06-29 09:...	2023-07-12 15:...	2	Acknowledged	Car Pending Res...

Verify Request Resend Escalate Cancel Request

2. From the left panel, three sections are available by selecting each. Select **Close** to close the panel.
  - a. **Submitted Requests** – this is the default page and it shows your company’s submitted requests. To take action on Submitted Requests in the **Pending** status, select one or more pieces of equipment first by clicking inside the checkbox of the first column. Then select an action button:

- Select **Verify Request** to show that a request is valid and to keep it from being automatically rejected. The request moves to the **Verified** status. A Pending request is automatically rejected after 180 days if it has not been verified. The Pending Timeline appears on the Home page.

Pending Timeline		
	Submitted	Incoming
0-30 Days	8	1
31-60 Days	0	0
61-90 Days	0	0
91-180 Days	0	8

- Select **Resend** to send a reminder notice to the Grantor (Fleet Manager of another fleet). The request remains in **Pending** status.
- Select **Escalate** to escalate your request to the Equipment Owner. The request moves to **Escalated** status.
- Select **Cancel Request** to cancel the request. The request moves to **Closed** status.

**Exhibit 48. Acknowledge/Approve/Reject Incoming Requests**

Transfer Requests | Incoming Requests

Submitted Requests | Incoming Requests | Pending 9 | Escalated 3 | Closed 9

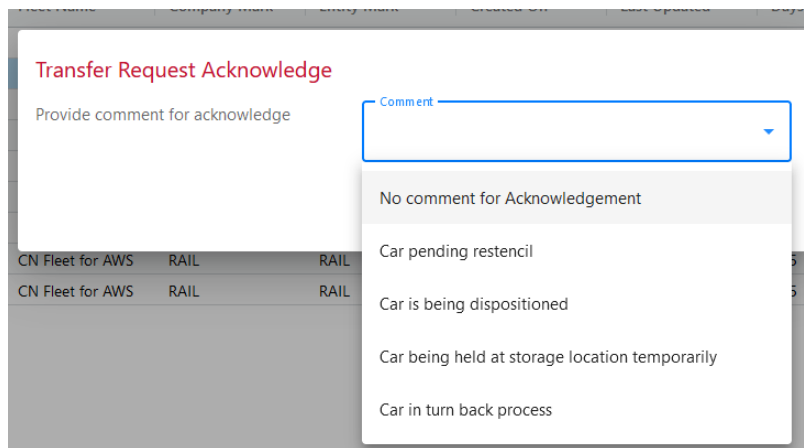
Expand/Collapse All | Clear Filters | Download to CSV

Equipme...	Fleet Name	Company Mark	Entity Mark	Created On	Last Updated	Days Since U...	Status	Comment
<input type="checkbox"/>	AABX 201109	CN Fleet for AWS	RAIL	RAIL	2022-01-24 16:...	2023-06-29 11:...	15	Verified
<input checked="" type="checkbox"/>	AABX 200632	CN Fleet for AWS	RAIL	RAIL	2023-03-31 10:...	2023-03-31 10:...	105	Pending
<input type="checkbox"/>	AABX 200642	CN Fleet for AWS	RAIL	RAIL	2023-03-31 10:...	2023-03-31 10:...	105	Pending
<input type="checkbox"/>	AABX 200631	CN Fleet for AWS	RAIL	RAIL	2023-03-31 10:...	2023-03-31 10:...	105	Pending
<input type="checkbox"/>	AABX 200623	CN Fleet for AWS	RAIL	RAIL	2023-03-31 10:...	2023-03-31 10:...	105	Pending
<input type="checkbox"/>	AABX 200629	CN Fleet for AWS	RAIL	RAIL	2023-03-31 10:...	2023-03-31 10:...	105	Pending
<input type="checkbox"/>	AABX 200634	CN Fleet for AWS	RAIL	RAIL	2023-03-31 10:...	2023-03-31 10:...	105	Pending
<input type="checkbox"/>	AABX 200650	CN Fleet for AWS	RAIL	RAIL	2023-03-31 10:...	2023-03-31 10:...	105	Pending
<input type="checkbox"/>	AABX 200601	CN Fleet for AWS	RAIL	RAIL	2023-03-31 10:...	2023-03-31 10:...	105	Pending

Acknowledge Approve Reject

b. **Incoming Requests** – these requests require action by your company. To approve or reject Incoming Requests in the **Pending** status, select one or more pieces of equipment by clicking inside the checkbox of the first column. Then select an action button:

- Select **Acknowledge** and select a **Comment** from the list that reflects why you are waiting to approve the request. This informs the requester of the reason for delay.



- Select **Approve** to approve the move of one or more pieces of equipment from your fleet to another fleet. The equipment is transferred, and the request moves to **Closed** status.
- Select **Reject** and select a **Comment** to reject the move of one or more pieces of equipment from your fleet to another fleet. Rejecting one or more requests escalates them to the Equipment Owner for verification. The request moves to **Escalated** status.

**Transfer Request Rejection**

Provide comment for rejection

Comment

- Car is held at storage location
- Car is still on lease/No record of lease termination
- Car awaiting repairs
- Invalid request/Wrong car number
- Car in turn back process
- Other

RAIL	RAIL
RAIL	RAIL

**Exhibit 49. Approve/Reject Escalated Requests (Equipment Owners only)**

**Transfer Requests | Owner Management**

Submitted Requests Incoming Requests Owner Management

Pending 6 Escalated 30 Closed 47

Expand/Collapse All Clear Filters Download to CSV

Equipment ID	Company Mark	Entity Mark	Company Mark	Entity Mark	Created On	Last Updated	Days Since Upd...
<input checked="" type="checkbox"/> AHWX 003082	RAIL	RAIL	C007	C007	2020-09-14 15:36	2020-09-15 08:18	0
<input type="checkbox"/> GEMX 005198	C012	C012	C007	C007	2020-08-26 12:17	2020-08-26 12:24	20
<input type="checkbox"/> GEMX 005101	C012	C012	C007	C007	2020-08-26 12:17	2020-08-26 12:24	20
<input type="checkbox"/> GEMX 005127	C012	C012	C007	C007	2020-08-26 12:17	2020-08-26 12:24	20
<input type="checkbox"/> WFRX 975255	C012	C012	RAIL	RAIL	2020-08-20 08:56	2020-08-26 12:24	20
<input type="checkbox"/> WFRX 975276	C012	C012	C007	C007	2020-08-20 08:56	2020-08-26 12:24	20
<input type="checkbox"/> GEMX 004987	C012	C012	RAIL	RAIL	2020-08-26 12:17	2020-08-26 12:24	20
<input type="checkbox"/> GEMX 005138	C012	C012	RAIL	RAIL	2020-08-26 12:17	2020-08-26 12:24	20
<input type="checkbox"/> GEMX 005059	C012	C012	RAIL	RAIL	2020-08-26 12:17	2020-08-26 12:24	20
<input type="checkbox"/> GEMX 005322	C012	C012	RAIL	RAIL	2020-08-26 12:17	2020-08-26 12:24	20
<input type="checkbox"/> GEMX 005114	C012	C012	RAIL	RAIL	2020-08-26 12:17	2020-08-26 12:24	20
<input type="checkbox"/> GEMX 005002	C012	C012	RAIL	RAIL	2020-08-26 12:17	2020-08-26 12:24	20
<input type="checkbox"/> WFRX 975245	C012	C012	TILX	TILX	2020-08-20 08:56	2020-08-20 08:57	26

Approve Reject

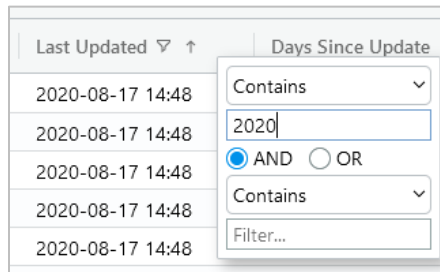
- c. **Owner Management** – these requests require Equipment Owner action and are available only to Equipment Owners. While Equipment Owners have the ability to approve or reject requests in **Pending** status and can see these requests before they are escalated, it is strongly recommended to allow the Fleet Manager to manage these requests. Equipment Owners are required to approve or reject requests in **Escalated** status. Select one or more pieces of equipment by clicking inside the checkbox of the first column.
  - Select **Approve** to approve the move of one or more pieces of equipment. The equipment is transferred, and the request moves to **Closed** status.
  - Select **Reject** to reject the move of one or more pieces of equipment. Rejecting one or more requests by the Equipment Owner moves the request to **Closed** status without moving the equipment.
3. For all sections in the previous step, three status tabs are available:
  - a. **Pending** – these require Grantor action.
  - b. **Escalated** – these requests require Equipment Owner action
  - c. **Closed** – these are closed requests that require no action
4. For Submitted requests in the **Pending** status, select one or more pieces of equipment by clicking inside the checkbox of the first column.
  - a. Select the **Resend** button to send a reminder notice to the Grantor (Fleet Manager of another fleet). The request remains in **Pending** status.
  - b. Select the **Escalate** button to escalate your request to the Equipment Owner. The request moves to **Escalated** status.
  - c. Select the **Cancel Request** button to cancel the request. The request moves to **Closed** status.
5. The following options apply to all sections and statuses listed above:

## Managing Requests

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- a. Initially tables are loaded with a collapsed amount of information about each piece of equipment. Select the **Expand/Collapse All** button to expand the details and use the bottom scroll bar to scroll over to view all columns. Use this button as a toggle to turn off the expanded details.
- b. Sort columns by selecting the column title. An ascending arrow appears. Select the column title again for descending and select it again to turn off sorting.
- c. Select the **Download to CSV** button to save the list to your computer.
- d. Filter on a column by hovering to the right of the column title. Select how you want to filter from the drop-down list and then enter your criteria. Select the **Clear Filters** button to clear all filters.

**Exhibit 50. Filter Transfer Requests**



The screenshot shows a table with two columns: 'Last Updated' and 'Days Since Update'. The 'Last Updated' column is sorted in ascending order, indicated by a small upward arrow. The table contains five rows, each with the date and time '2020-08-17 14:48'. A filter dropdown menu is open over the 'Days Since Update' column. The dropdown menu has a search box containing '2020', a 'Contains' dropdown menu, radio buttons for 'AND' (selected) and 'OR', another 'Contains' dropdown menu, and a 'Filter...' input field.

Last Updated ▾ ↑	Days Since Update
2020-08-17 14:48	
2020-08-17 14:48	
2020-08-17 14:48	
2020-08-17 14:48	
2020-08-17 14:48	

## Appendix A. Adding OT-57 Contacts to FindUs.Rail

FindUs.Rail is a web-based centralized database that allows you to review and manage your company's contact information. It helps railroad departments, private equipment owners, and leasing companies stay connected and query contacts and agency relationships for industry functions and roles.

If you are a controlling entity who will be creating fleets in the Loading Authority (OT-57) application, you need to be setup in the FindUs.Rail database with your e-mail and phone number contact information. Within FindUs.Rail, there is a Loading Authority (OT-57) controlling entity contact type. If this contact information is not setup, then your controlling entity contact information will not be available for selection when your company's fleets are created. If you are not already registered in the FindUs.Rail contact database, go to <https://public.railinc.com> to request permission after establishing your SSO account. Refer to the [FindUs.Rail User Guide](#) for complete instructions on using the FindUs.Rail system.

Your setup in FindUs.Rail does not determine your privileges and what actions you can take within the Loading Authority OT-57 system; these are also determined by your SSO role. FindUs.Rail is simply used for your email contact information and to identify your role to others in the railroad industry. Every Loading Authority OT-57 controlling entity should be listed as a contact in FindUs.Rail.

Use the following procedure to add a Loading Authority OT-57 contact into FindUs.Rail.

**Note:** This procedure requires that you have set up a Railinc Single Sign-On (SSO) User ID and already have a FindUs.Rail account. See the notes in [Getting Started](#) to access information about SSO.

1. Go to <https://public.railinc.com> to login (see Logging In).
2. From the Launch Pad, in the **My Applications** section, select **FindUs.Rail**.
3. Once inside FindUs.Rail, select the **Contacts** menu, and then select the **Add Contact** link. The Add Contact page is displayed, with the **Contact** section at the top of the page and the **Categories** section at the bottom of the page.

Exhibit 51. FindUs.Rail Add Contact – Contact Section

The screenshot shows the 'Add Contact' form in the FindUs.Rail application. The form is divided into several sections: 'Company ID (MARK)' with a dropdown menu set to 'RAIL'; 'Personal Information' with fields for 'First Name', 'Last Name', '\*Contact Type', '\*Title/Position', and '\*Email'; 'Phone' section with 'Primary' and 'Secondary' phone numbers, each with fields for 'Intl', 'Area', 'Number', and 'Ext.'; 'Fax' section with similar fields; 'Address' section with fields for '\*Address', '\*City', and '\*St./Prv'; and a 'Company' section on the right with 'Company: RAILING CORPORATION', 'Company Reference', 'Website URL', and 'Notes'.

4. In the Contact section, complete all the mandatory fields (shown in red).
5. In the **Categories** section, select **Loading Authority (OT-57)** in the drop-down list box.

Exhibit 52. FindUs.Rail Add Contact – Categories

The screenshot shows the 'Categories' section of the 'Add Contact' form. It features a heading 'Categories' and a note: 'Any assigned categories must have at least one category function specified.' Below this, there is a list of categories. The first category, 'Loading Authority (OT-57)', has a red checkmark and a trash icon. Below the list, there are several options: 'Category Role' is set to 'Primary'; 'Category Functions' includes three checkboxes: 'Controlling Entity', 'Equipment Owner', and 'Railroad'; and 'Apply Contact to Additional Marks?' has an unchecked checkbox. At the bottom of the section, there are two buttons: a red 'Delete Category' button and a blue 'Add Category' button.

6. Check all the appropriate category functions for which you are responsible.
7. Select the **Add** button.
8. Select the **Save** button. The new FindUs.Rail contact information is added. If you receive an error message stating that only one primary contact can exist for a company, select **Secondary** as the Category Role.

## Glossary

**AAR**—Association of American Railroads. The standard setting organization for North America’s railroads.

**CIF**—Customer Identification File. Carriers use CIF codes to identify customer locations where price and other contract terms apply; to provide accurate delivery instructions; and to improve shipment reservation, booking, and equipment ordering processes.

**CSM**—Centralized Station Master. A geographic location file that contains data about North American rail and motor carrier point stations. Railroads use this file primarily to plan efficient freight movements from origin to destination.

**IRF**—Industry Reference Files. These are the North American railroad industry’s official code tables that are used to ensure consistency in data interpretation and facilitate communication among industry partners.

**FindUs.Rail**—A web-based database of essential rail industry contacts that enables users to review and manage their contact information, enabling railroad departments, private car owners, and leasing companies to communicate effectively.

**FSAC**—Freight Station Accounting Code. A five-digit code assigned to a station.

**Mark**—A two-to-four-letter abbreviation for a railroad, shipper, lease agent, shop, etc.

**SCAC**—Standard Carrier Alpha Code. A two- to four letter code used to identify transportation companies.

**SPLC**—Standard Point Location Code. A six- to nine-digit numeric code used to specify the physical location of a station.

**SSO**—Single Sign-On. The portal for signing into various Railinc applications.

**Umler**—System for tracking the physical characteristics, transportation management, and pool assignments of virtually every piece of rail equipment in North America.

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