eModal PreGate
MTO Guide
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Terminal Operator View

The Marine Terminal Operator (MTO) profile menu consists of a PreGate view in “PREGATE MOVES” or “PREGATE VISITS” within the eModal Community Portal group, for quick visibility to PreGates. Then an administration group screens for managing slots, yard profiles, rules, and filters, under the group “PREGATE”

All users with terminal operator access will have rights to view any of these menu items.
1. **PreGate Moves or PreGate Visits**

To access the PreGate System, you now have the option to view PreGates by

Move – Menu > eCP (eModal Community Portal) > PreGate Moves
Visit - Menu > eCP (eModal Community Portal) > PreGate Visits

**My Gate Moves** will display each of your moves individually by move type (i.e. Pick Import, Drop Export, Pick Empty, etc.)
**Truck Visit** will display a visit per line, and then all moves under that visit.
1.1 **PreGate Moves / My Gate Moves**

Once entered into the PreGate Moves, the terminal will be directed to the My Gate Moves screen. By default, the My Gate Moves screen will display in compressed mode with all of the trucker’s PreGate moves filtered on current date or greater, and will display for your terminal. To expand the view, click on the “+” sign to the left of the individual move. If you have a dual move of example Drop Empty and Pick Import on one ticket, then you will see one line for the Drop Empty, and one line for the Pick Full, with both lines displaying the same Ticket number.
Clicking the “+” sign display further information related to the move.

The user can perform single ascending/descending sorting of columns by clicking on the column title and the ▼ or ▲ icons will change to indicate sort order. To perform advanced/multiple searches, see next section.
1.2 Advanced Search Filtering

Once entered into the PreGate Visits, the terminal will be directed to the Truck Visit screen. By default, the Truck Visit screen will display all of the trucker’s PreGate visits in expanded mode for the current date or greater, and will display for your terminal. To collapse the view, click on the “-” sign to the left of the individual visit, or on top to compress all. You can then click again on “+” to expand individually or all. Each visit ticket will expand to show you all of the moves under that visit ticket.
All compressed view of the visits.

The user can perform single ascending/descending sorting of columns by clicking on the column title and the ▼ or ▲ icons will change to indicate sort order. To perform advanced/multiple searches, see next section.
1.3 Advanced Search Filtering

The Advance-Search button will generate a pop-up window for the Search Criteria. The user can select or deselect any criteria and then perform the desired search.
Allowable search commands (not all options available for all criteria):

Equal - single selection or input of value

In - multiple selection or input of values (for input, separate by a comma “,” with no spaces between values).

NotIn - exclude the selected values

Contains - search for records that have part of entered value (example: container contains EISU, will return all containers that have EISU in the value)

GreaterThan - greater than, not including, the entered value

GreaterThanOrEqualTo - greater than, and including, the entered value

LessThan - less than, not including, the entered value

LessThanOrEqualTo - less than, and including, the entered value

Between - between values inputted, inclusive of values inputted

startsWith - search for values that start with entered value

endsWith - search for values that end with entered value
To clear filters and return to the default settings, click on the **Clear-Search** button.

**NOTE**: you can perform a fast search on the default page or Advance Search filtered page, by entering a value that you want to find into the Search window. So example if you want to find a ticket with number 555 in it, you would type that in the field and click the magnifying glass icon.
1.4 Sorting

The user can sort data on the My Gate Moves screen in ascending/descending order by clicking on any of the column title headers. The user may also perform a multi-header sort by clicking on the Sorting icon.
After the user has selected which desired field(s) to apply, you will then have the option to select “Asc” ending or “Desc” ending order.

The Sort Order pop-up window will appear and the user can click +Add to apply filters for the following criteria:

- Ticket
- Container
- Date
- ISO
- Status
- TOS Status
Clicking on **OK** or the ☑ icon again will then run the sort and return you to the Truck Visit screen with your new sort.

To clear your sort, click on the **Clear Sort** button.
1.5 Exporting of View or Selection and Page Navigation

Users have the ability to export data to an Excel spreadsheet by selecting the Page or All button from the Export to Excel section; the user can opt to export by ‘Page’, the system will export only the current page view (i.e. if the Items Per Page is set to 15 and page 3 is being viewed, the system will only export the number of entries displayed on page 3).

If the user opts to export ‘All’, the system will export all entries that are returned from the applied filter (rather than exporting only what is displayed on that screen).
Users can choose to have 15, 25, 50, or 100 entries per page display by selecting the respective values on the Items Per Page drop down on the bottom left of the page.

The user can navigate back a page by clicking the <<Prev icon, or forward by clicking the Next>> icon. To go to first or last page click <<First or Last>> respectively. Additionally, there is the option to jump to a specific page by inputting the exact page number in the Page field.
1.6 Canceling a PreGate

User can cancel a PreGate by clicking on the red delete (X) icon on the right. Only those PreGates which are not yet expired (end time of time slot has not elapsed) will be allowed to be canceled. You will see that the icon is dark red. If icon is light red, that PreGate cannot be canceled.
Prior to cancellation, you will be asked to confirm that you want to cancel.
2. View Slot Schedule

The View Slot Schedule screen displays the slot schedule for the Year, Month, and Week selected. This schedule is based on previously provided slots and schedule provided by the MTO, or set up in slot schedule maintenance. The Schedule Details are not edited from this screen, this is for quick view only.
Lead Time – minutes from the end time that dispatchers can make a PreGate. Example for 08:00-09:00, the driver has until 08:30 (with a 30 minute lead time) to make the PreGate. If you want trucking companies to make PreGates for a slot up until the end, then set Lead Time to 0 (zero).

Blocked – is the time slot blocked from making PreGates. The block is in effect from the time that it’s activated, but will not cancel that time slot or any moves already created against that time slot. Example, if a block is activated after PreGates have already been created for that time slot, system will not allow for any further PreGates for that time slot, but the ones created are still active. If you want to cancel those PreGates, you will have to cancel those PreGates individually (see 1.4. Canceling a PreGate)
3. Moves Lookup

Moves Lookup allows for the lookup of a specific container during a specified date range.
4. PreGate Availability

MTO may view available PreGates by searching on PreGate Date and Type. The report will display the Shift, Time slot and the availability of that PreGate slot.
5. **Availability Trucker**

A MTO may view the PreGates available for a trucker by PreGate type. Each PreGate type will display the Total Slots allotted, Total PreGates (made for that PreGate type), Available Ground, and Available Wheeled. When selecting the details for a PreGate type, the Terminal Operator will also be able to view the Total Slots for each Time Slot, Total PreGates (made), Available Ground, and Available Wheeled.
6. PreGate Lookup

PreGate Lookup allows Gate Security to verify the status of a PreGate by searching the Terminal and PreGate Number. The details of the PreGate will also display.
7. Slot Schedule

The View Slot Schedule screen displays the Standard Template for the date selected. This default schedule is preloaded based on previously provided slots and scheduled provided by the terminal operators. The Slot Schedule allows the Terminal Operator to apply a pre-created User Defined Template, or reset the schedule to another Standard Template. The Schedule Details can be edited from this screen, by changing values in editable fields (i.e. Total Slots) and clicking submit.
You can override the daily slots by populating with a User Defined Template or Standard Template. Example of populating a different schedule is for unscheduled terminal closures, change of slot times, holidays, etc.

**Lead Time** – minutes from the end time that dispatchers can make a PreGate. Example for 08:00-09:00, the driver has until 08:30 (with a 30 minute lead time) to make the PreGate. If you want trucking companies to make PreGates for a slot up until the end, then set Lead Time to 0 (zero).
**Blocked** – is the time slot blocked from making PreGates. The block is in effect from the time that it’s activated, but will not cancel that time slot or any moves already created against that time slot. Example, if a block is activated after PreGates have already been created for that time slot, system will not allow for any further PreGates for that time slot, but the ones created are still active. If you want to cancel those PreGates, you will have to cancel those PreGates individually (see 1.4. Canceling a PreGate)

**Total Slots** – Total number of scheduled PreGates (PreGates created with a time slot) that can be created for that time period. This number does not consider unscheduled PreGates (i.e. Pre Arrivals, Auto In Gates, etc. which only require a date)

**Wheeled Moves & Grounded Moves** - when selected, the PreGates by Area window will appear. The PreGates by Area window will allow the user to adjust the yard capacity, or close the area based on the Areas selected. The drop down selection is based on Yard Management defined wheeled or grounded locations
**Total Moves** – clicking on the number will display the total number of PreGates made

**Resv Slots** – when selected, the Trucker slot Assignment window will appear. The Trucker Slot PreGate window allows the Terminal Operator to adjust the details for the time slot, as well as reserve or ban PreGate slots for a specific trucking company.

**Filter Slots** – shows the number of filters applied to the time slot, clicking on the number would show what was applied

**Filter Moves** – the total number of PreGates created that match a filter, clicking will show the PreGates

**Avail Slots** – the total number of slots still available for PreGate creation

**NOTE:** changes done in this panel are one-time and not carried over to following days/weeks/months. To make a permanent change, update the corresponding Standard Template with changes.
8. Slot Profile

The Slot Profile screen is where a Terminal Operator can create, update, or remove Standard, Advance, and User Defined templates for the terminal schedule. Once templates have been created, users can search for templates from this screen.

Select a Template Type and search.
Clicking on the version # (in example, the 0001) will bring you the template.
8.1 Standard Template

The Standard Template is the schedule that trucking companies will be making their PreGates against. The Standard Template is what the system will use to generate slot schedules at the time interval set in the Schedule Lead Time.

User will need to enter the effective date and select a Schedule Lead Time.

The Schedule Lead Time is the length of time in the future that the terminal allows the trucker to make a PreGate. If the Terminal Operator selects 1 Week Advance, a trucker will be able to make a PreGate for the week of the Standard template plus 1 week out. 1-day means the driver will only be able to select current date and tomorrow.

Enter a Description of what this Standard Template does. You can have more than one Standard Template, so you could have one template that is standard for “Year Minus Summer” which you would have effective starting January 1, 2xxx and another template that is “Summer Standard” which you run during the summer and you will have that effective June 1, 2xxx. The template would run starting at the effective date. So if you have more than one template, a description explaining the use of the template can become important.
The user must then enter/select:

- A time period From and To. Two time slots cannot cross each other (i.e. 01:00-02:00 and then 01:30-02:30)
- A lead time (in minutes)
- Select whether or not a time slot is blocked from making PreGates
- Enter the total number of time slots (only accounts scheduled PreGates)
- Apply filters (if applicable)
8.2 User Defined Template

A User Defined Template can be created to override the Standard Template, based upon a specific date. After the User Defined Template is created, it can be applied to the schedule on the Slot Schedule screen at the time of use. A User Defined is intended for temporary, occasional use. Example, you could create a template called “Holiday Template” for use during holidays where gate times and slots would be different than the Standard Template.

To create a User Defined Template, a user must enter:

- Name
- Description of filter
- Effective Date
- Time (From/To) Two time slots cannot cross each other (i.e. 01:00-02:00 and then 01:30-02:30)
- Lead Time (if applicable)
- Blocked (if applicable)
- Total Slots
8.3 Advanced Template

To override the Standard Template, a user can create an Advanced Template. The Advanced Template is more detailed than the Standard or User Defined Template in that a user must select a specific Shift and PreGate Type. You can further specify yard location allowance for number of PreGates.

The user must enter:

- Name
- Day
- Shift
- Appt Type
- Date
Within the Advanced Template, the user can further edit the Profile Details

- Filter Slots (apply filters)
- Reserve Slots (reserve or ban a number of slots for a Trucker)
- YARD (designate the slots based on yard area)
- PreGate Slot Filter

The PreGate Slot Filter allows a user to block or apply a Filter for a specific number of slots. If a user chooses to add a Filter to a specific PreGate Hour, they must enter:

- ✔ #Slots
- ✔ Filter
- ✔ Priority
• Trucker Slot Assignment

Terminal operators have the ability to reserve a number of slots OR ban a specific trucking company from using a number of slots.
9 Slot Filter Manager

The Slot Filter Manager allows a Terminal Operator to search for and create Filters. A filter is an exception that can be applied to a time slot within a schedule. For instance, a Terminal Operator can apply a filter dictating that a specific number of PreGates made within a time slot must be hazmat containers, or in turn block truckers from making a PreGate related to a hazmat container.

If you have filter name, input, or else blank and search
To expand and show the filter criteria, click on the “>” icon.

To edit a filter, click the box to the left of the filter, and select “Update Filter” or “Delete filter” to perform the function.
9.1 Create a New Filter

To create a new Filter, a Terminal Operator will need to select the Add New button. A Terminal Operator will then need to decide on the Filter Details:

- Filter Name
- Filter Type (Name)
- Value

All selected criterias are based on an “ADD” command. So if you select Hazmat, Yard Area, Line, Container type, system is filtering as Hazmat AND Yard Area AND Line AND Container type. There is no “OR” ability.
10. **Slot Filter Usage**

The Filter Usage screen is a reporting tool for the Terminal Operator to view where a Filter has been applied to on the Slot Schedule. The user can create a report by:

- MTO
- PreGate Type
- Filter Type
- Filter Name
- Date (From/To)
11. Yard Profile Management

The Yard screen displays the yard areas and capacities that have been predetermined by the terminal. From the Yard Profile Management screen, a user is able to Adjust or Override the Default Capacity, but they may not create a new yard capacity.
11.1 Adjust Default Capacity

A Terminal Operator can adjust the yard capacity by adding or subtracting from the original capacity, or by entering a new capacity. Once the capacity has been adjusted, the user will need to select the Recalculate button and then the Submit button. A terminal operator can also choose to close the area.

**NOTE:** If the user selects the (+), the icon will change to (-).
11.2 Override Area Capacity

This window allows the user to override area capacity based on a specific Date and Shift. The user may adjust the capacity by adding or subtracting from the original capacity, or the user may add a New Capacity. Once the new capacity has been entered, the user will need to select the Recalculate button and then the Submit button. Users can also Close Area for this date and shift.

NOTE: If the user selects the (+), the icon will change to (-).
12. **Rules Manager**

The Rules Manager screen will display the predetermined Rules set by the Terminal. The Rules are categorized by PreGate type. For the move types listed on the left, there will be a list of associated Rules that apply to that move type. Not all rules are user editable rules, some are system rules.
Select Rules can be edited by the Terminal Operator. If a PreGate Rule can be edited, the user will be able to edit:

- Description
- Type (Error, Warning, Information)
  - Error: The trucker will not be allowed to make a PreGate.
  - Warning: The Trucker will be allowed to make a PreGate but they will need to visit the trouble window to sort out any issue(s)
  - Information: The trucker can make a confirmed PreGate and there is no need to visit the trouble window.
- Active (whether or not the Rule is currently active)
You can add variances to the rules based on Line as well, so that if general rule is warning, you could have Errors or selected lines and it would be a severe failure instead.
13. Audit Log

The Audit Log screen provides the Terminal Operator with a detailed PreGate report based on:

- Date
- Container #
- Booking #
- PreGate Type
- PreGate #
- Trucker
# Document Control (amendment history & version control)

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