eModal PreGate System

Creating a PreGate

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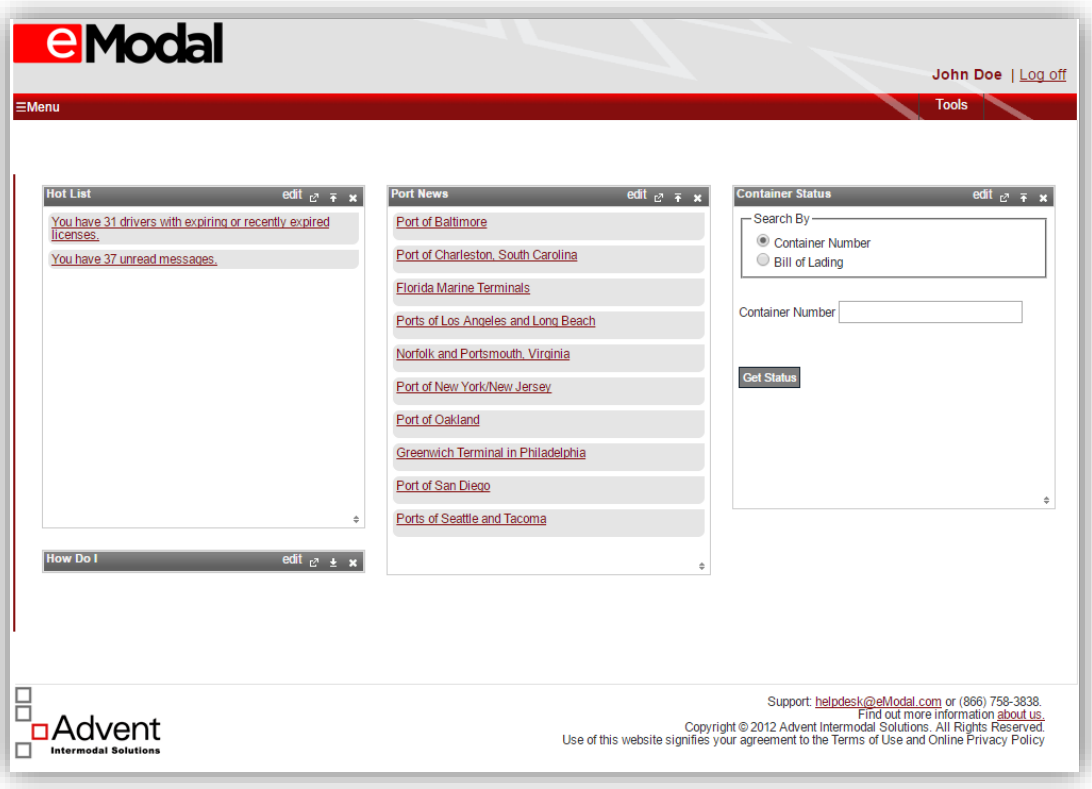
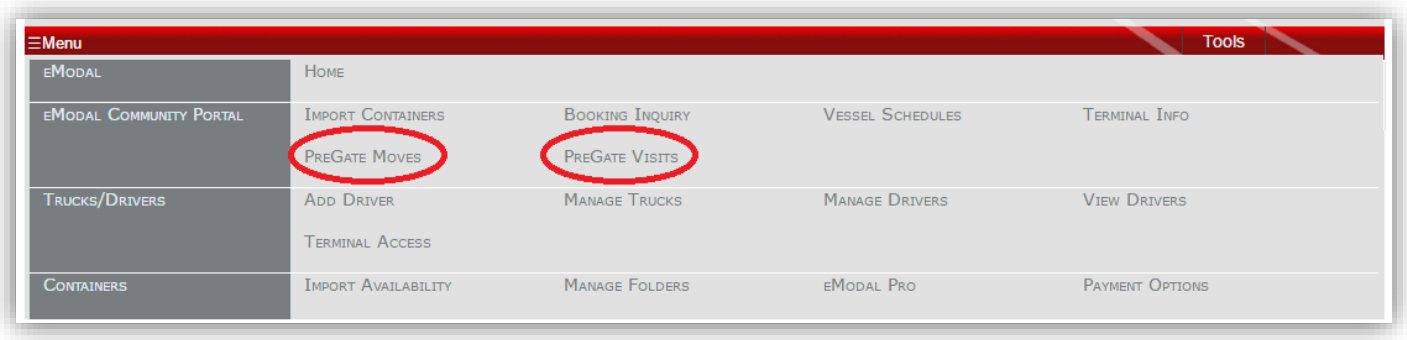
1. **eModal PreGate System**

Upon logging into eModal, the user will be defaulted to the landing page. The user name located at the top right corner of the screen will display who is currently logged into the account. This is important to note as not all functions will be available depending on specific user permissions.





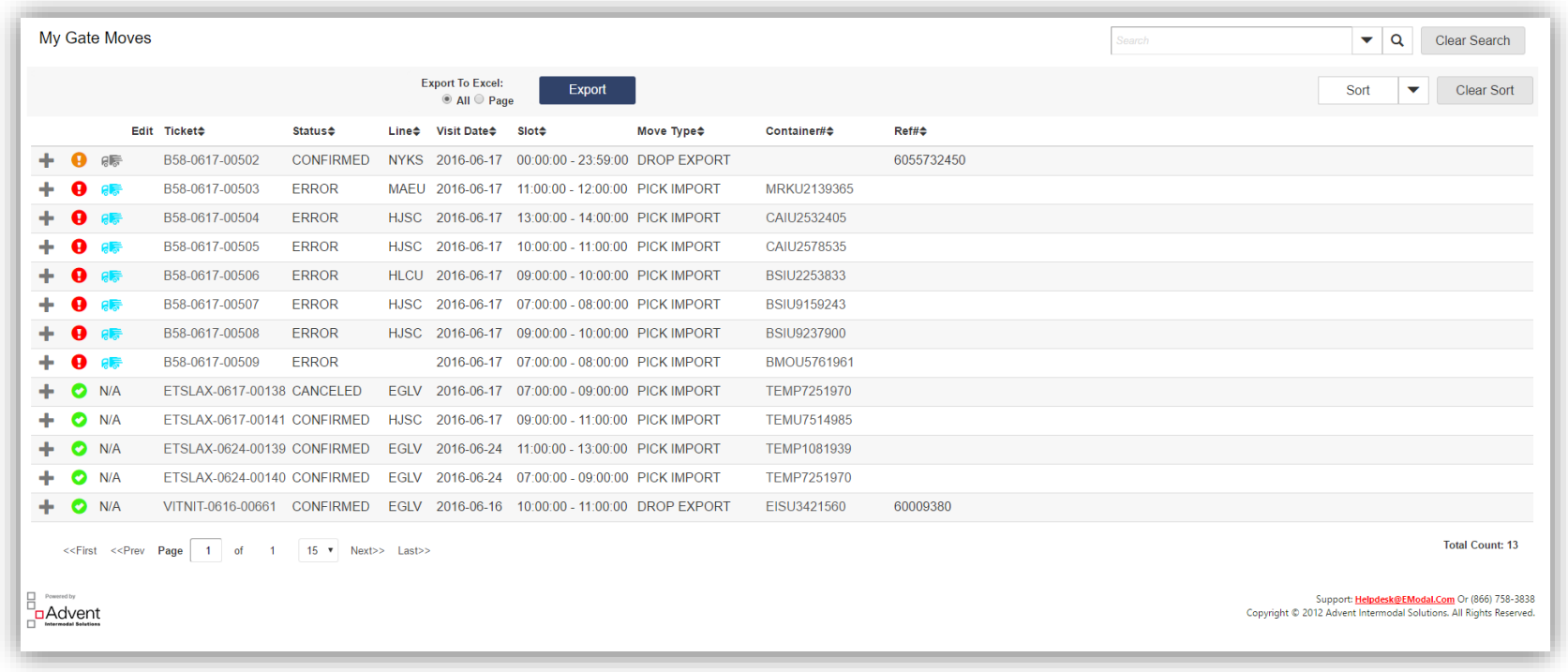
To access the PreGate System, you now have the option to view PreGates by

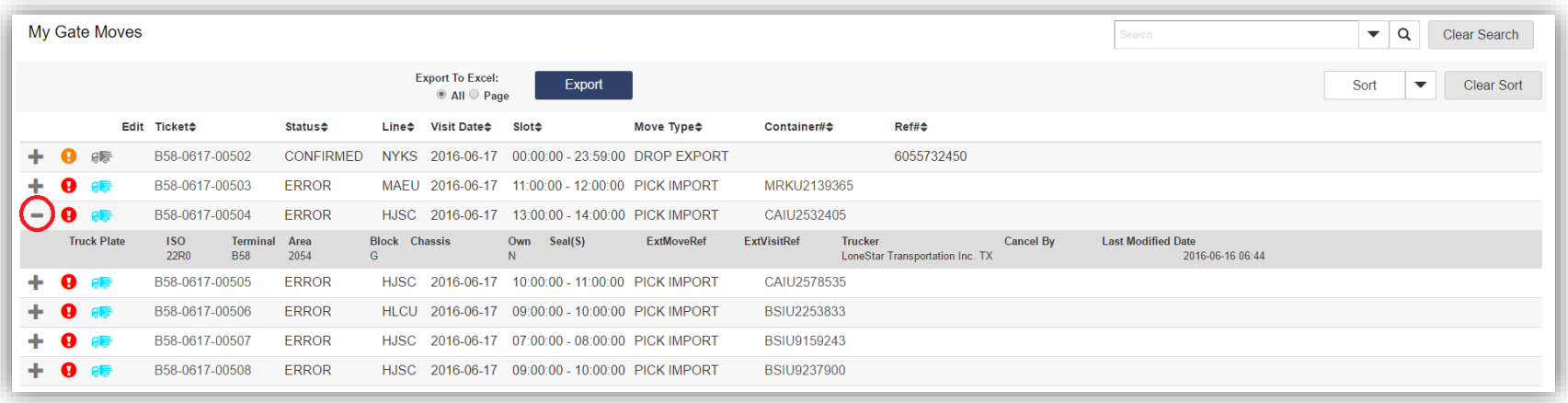
Move – Menu > eCP (eModal Community Portal) > PreGate Moves
Visit - Menu > eCP (eModal Community Portal) > PreGate Visits

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 user 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 user's PreGate moves filtered on current date or greater, and will display across all participating terminals. 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.



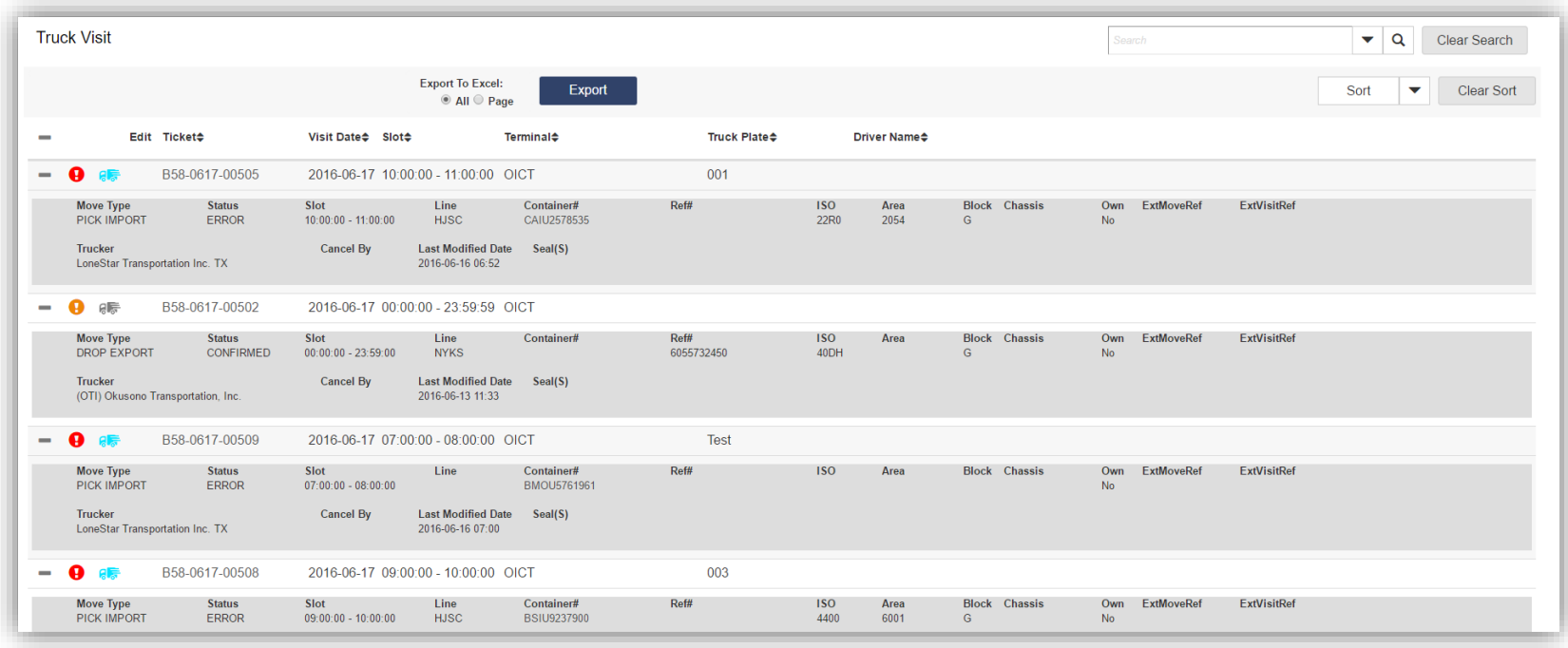


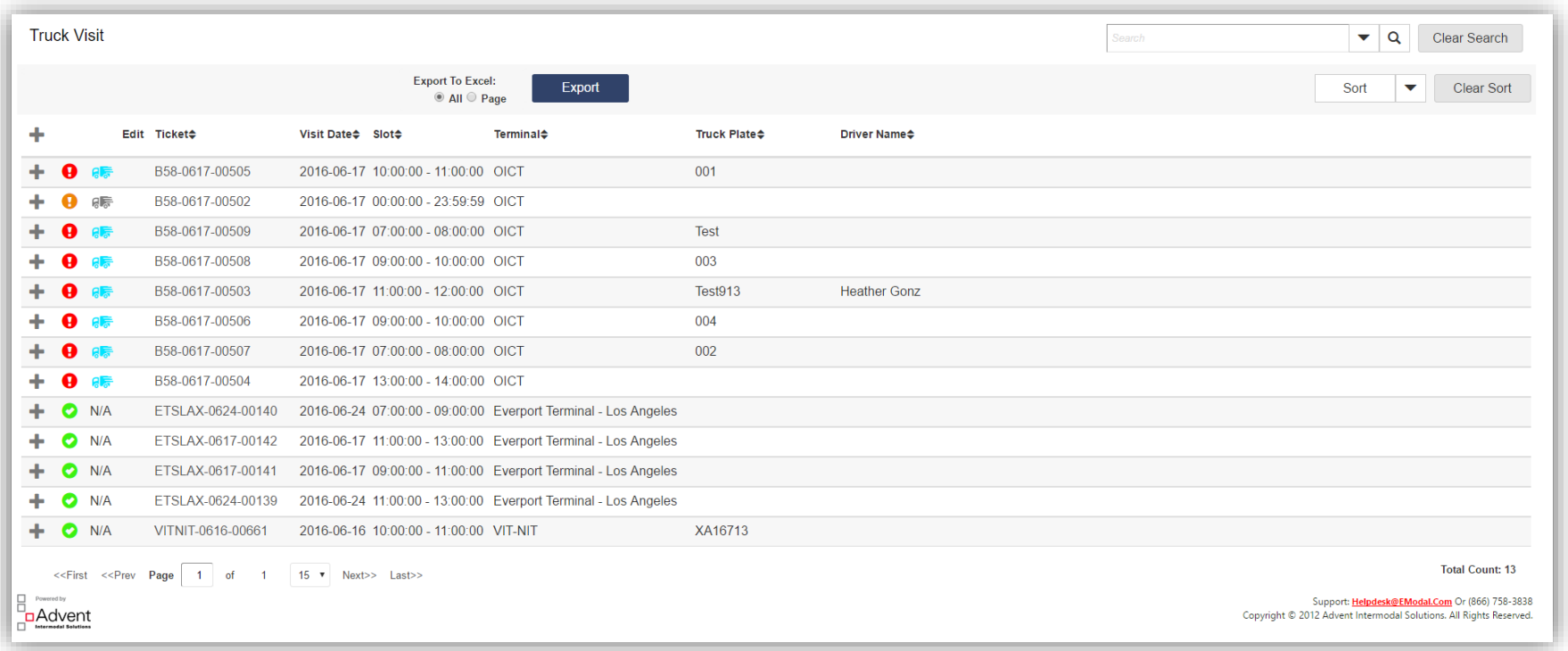
Clicking the “+” sign display further information related to the move.

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 PreGate Visits / Truck Visit

Once entered into the PreGate Visits, the user will be directed to the Truck Visit screen. By default, the Truck Visit screen will display all of the user's PreGate visits in expanded mode for the current date or greater, and will display across all participating terminals. 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.



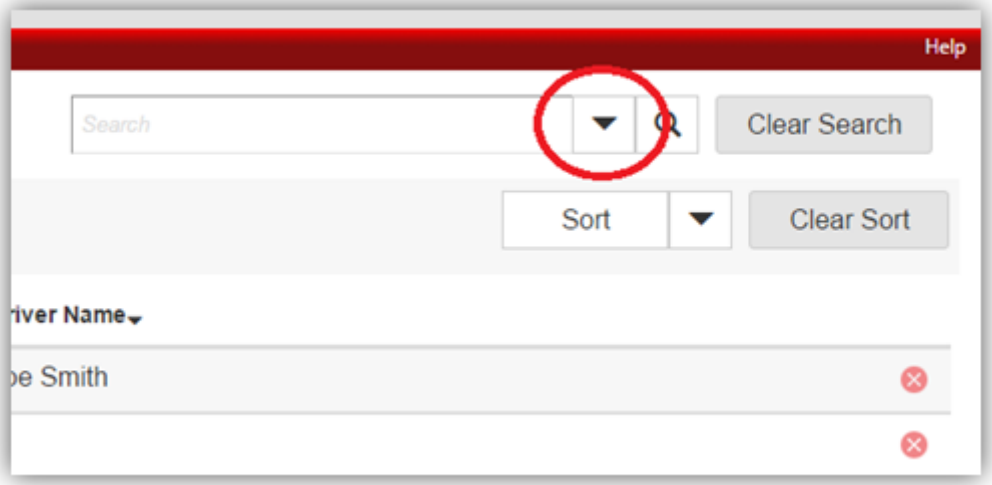


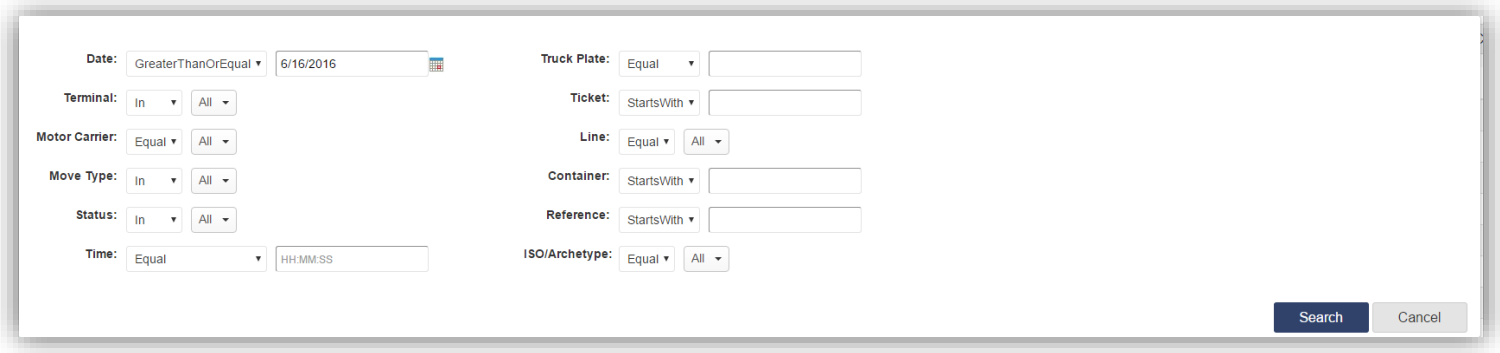
All compressed view of the visits.

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 icon ▼ on the top right corner of the My Gate Moves and Truck Visit screens, when clicked, 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

GreaterThanOrEqual- greater than, and including, the entered value

LessThan- less than, not including, the entered value

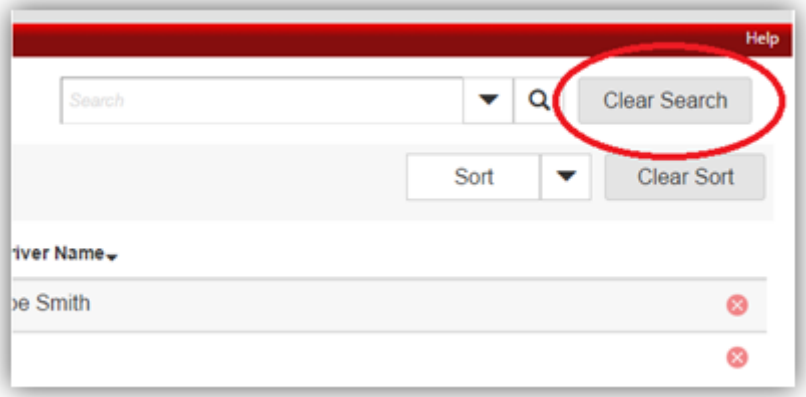
LessThanOrEqual- less than, and including, the entered value

Between- between values inputted, inclusive of values inputted

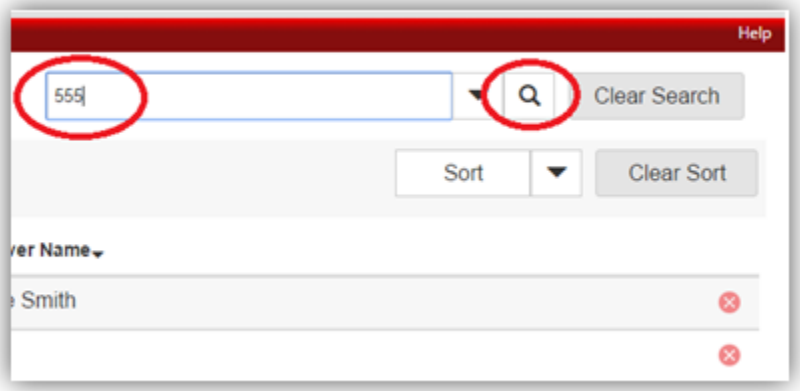
StartsWith- search for values that start with entered value

EndsWith- search for values that end with entered value

To clear filters and return to the default settings, click on the **Clear-Search** button.

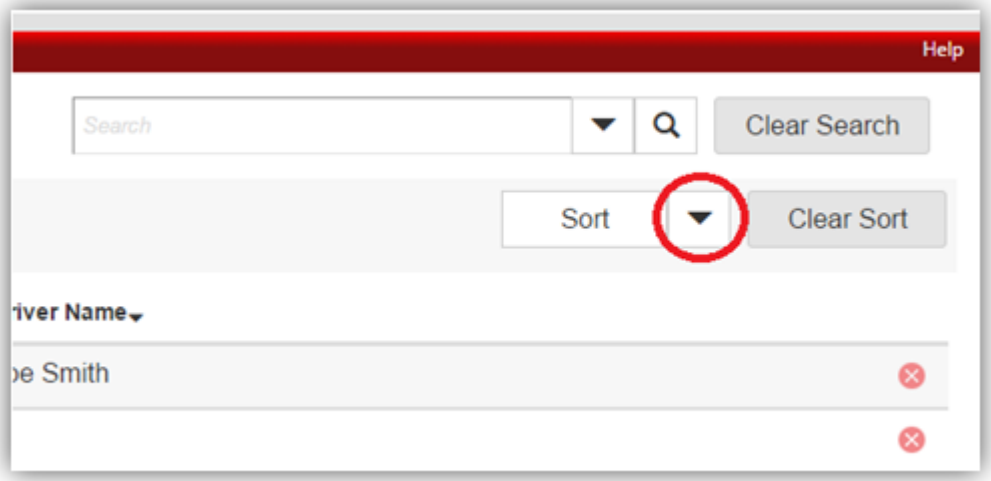


NOTE: you can perform a fast search on the default page or Advance Search filtered page, by entering a value that you want to find into the Search window. So example if you want to find a ticket with number 555 in it, you would type that in the field and click the magnifying glass icon.



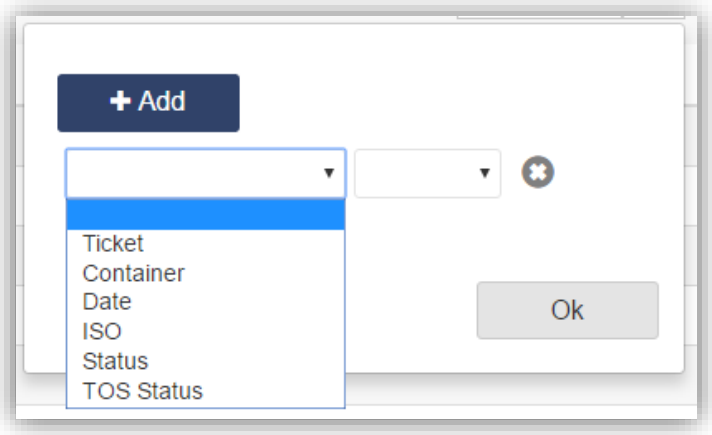
1.4 Sorting

The user can sort data on the Truck Visit 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 ▼ sort icon.

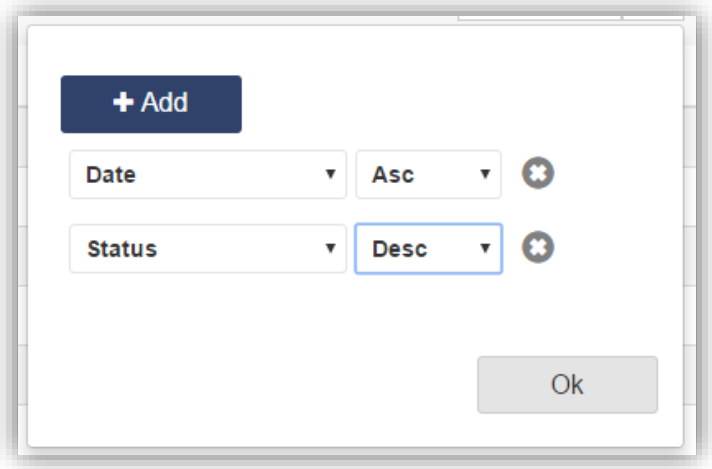


The Sort Order pop-up window will appear and the user can click **+Add** to apply filters for the following criteria:

Ticket
Container
Date
ISO
Status
TOS Status

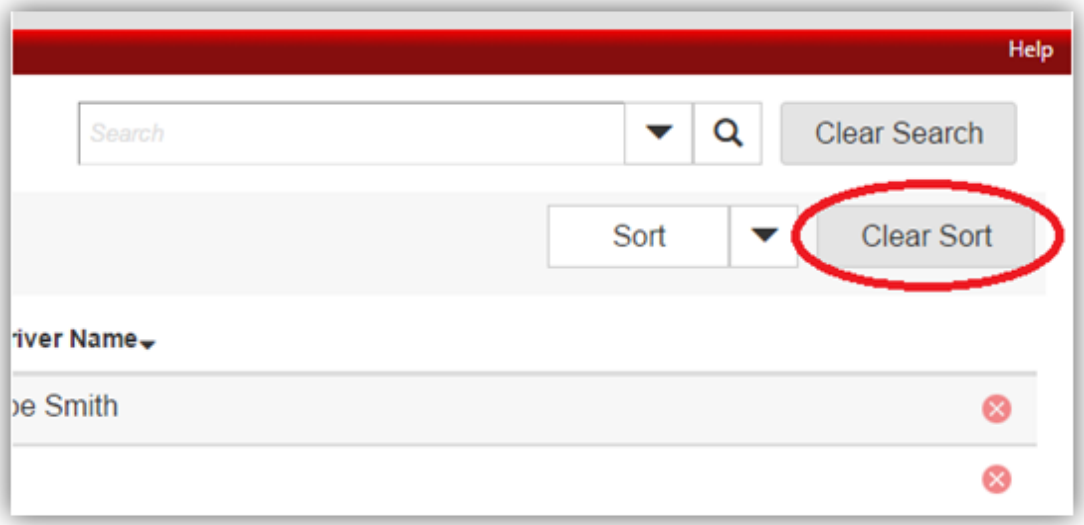


After the user has selected which desired field(s) to apply, you will then have the option to select "**Asc**"ending or "**Desc**"ending order.



Clicking on **OK** or the ▼ icon again will then run the sort and return you to the Truck Visit screen with your new sort.

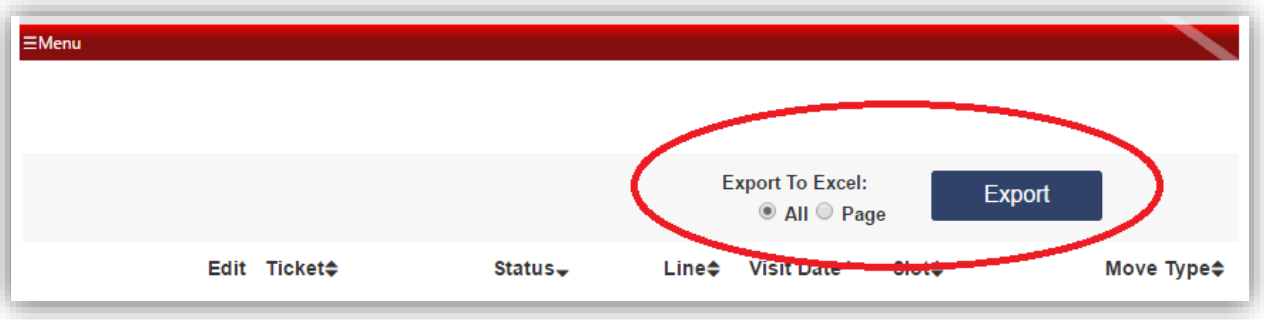
To clear your sort, click on the **Clear Sort** button

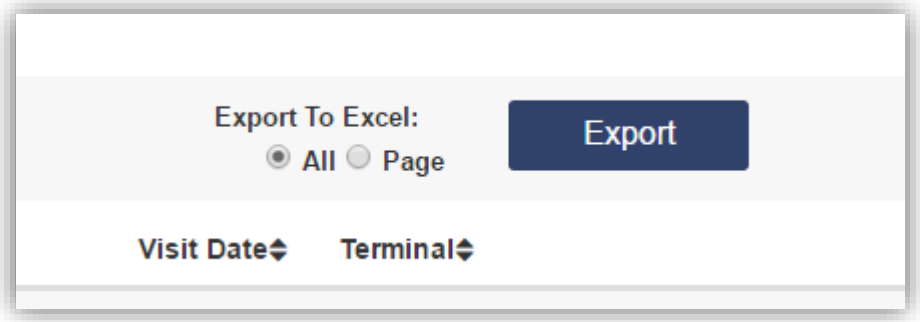


1.5 Exporting of View or Selection and Page Navigation

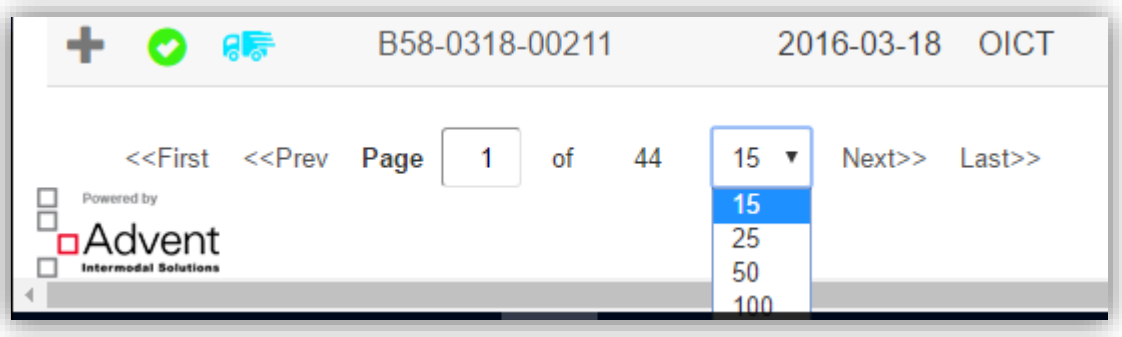
Users have the ability to export data to an Excel spreadsheet by selecting the **All** or **Page** button from the Export section; the user can opt to export by '**Page**', the system will export only the current page view (i.e. if the Items Per Page is set to 15 and page 3 is being viewed, the system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





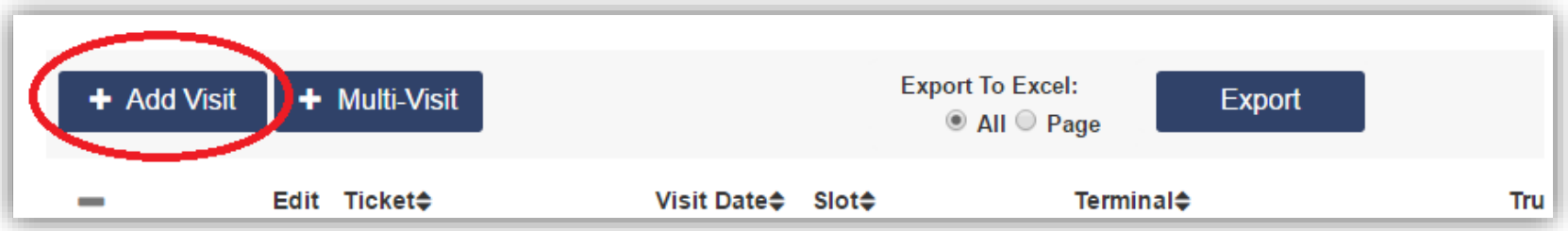
Users can choose to have 15, 25, 50, or 100 entries per page display by selecting the respective values on the Items Per Page drop down on the bottom left of the page.



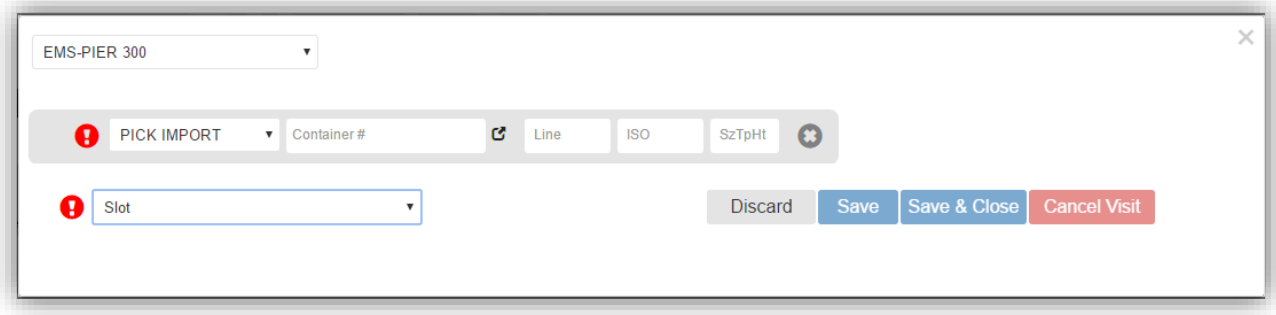
The user can navigate back a page by clicking the **<<Prev** icon, or forward by clicking the **Next>>** icon. To go to first or last page click **<<First** or **Last>>** respectively. Additionally, there is the option to jump to a specific page by inputting the exact page number in the **Page** field.

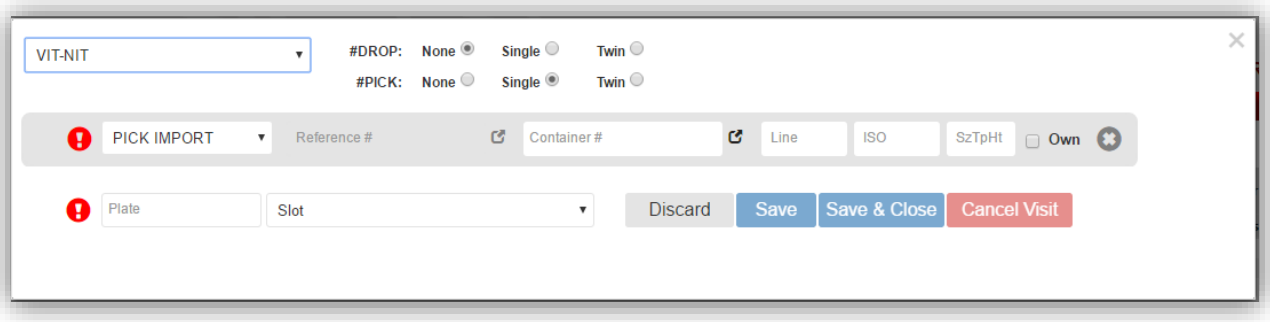
2. How to Create a PreGate Move:

To create a new visit, the user will select the **+Add Visit** or **+Multi-Visit** (*see. 5. Multi-Visit Create*) icon on the top left of the My Gate Moves or Truck Visit screens.

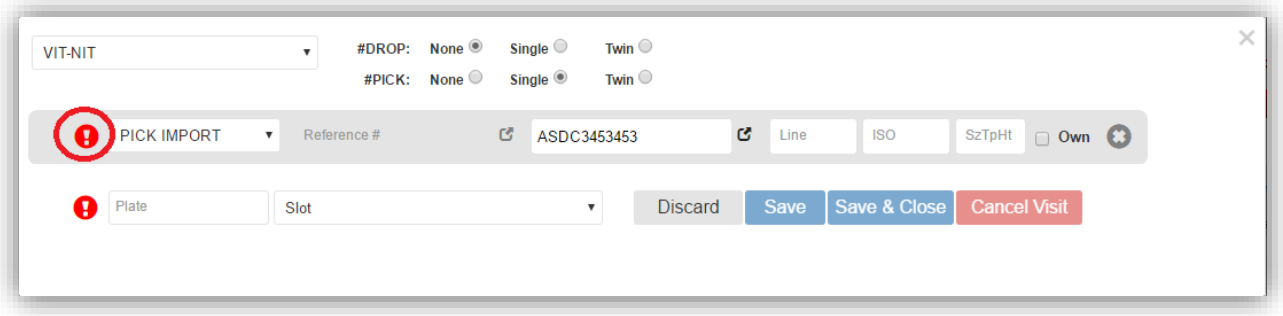


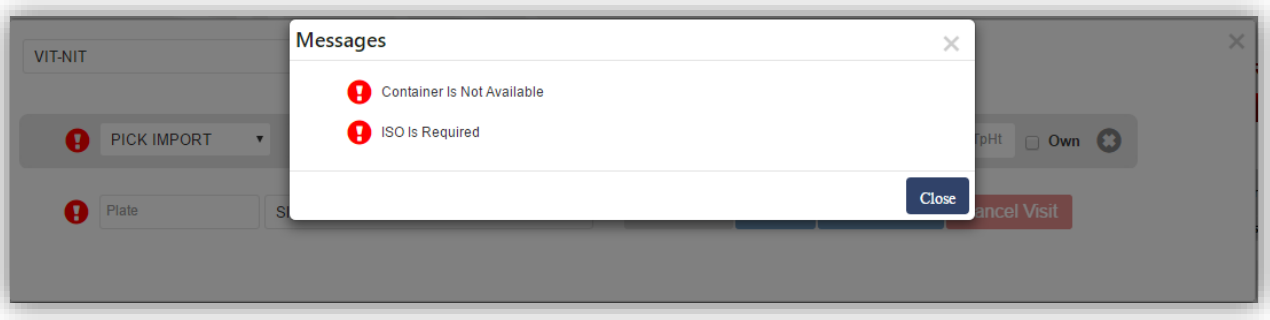
Once the Add Visit function has been selected, a pop-up of the visit input screen will appear. Different columns or available move patterns will appear, depending on the selected terminal and their specific PreGate requirements.





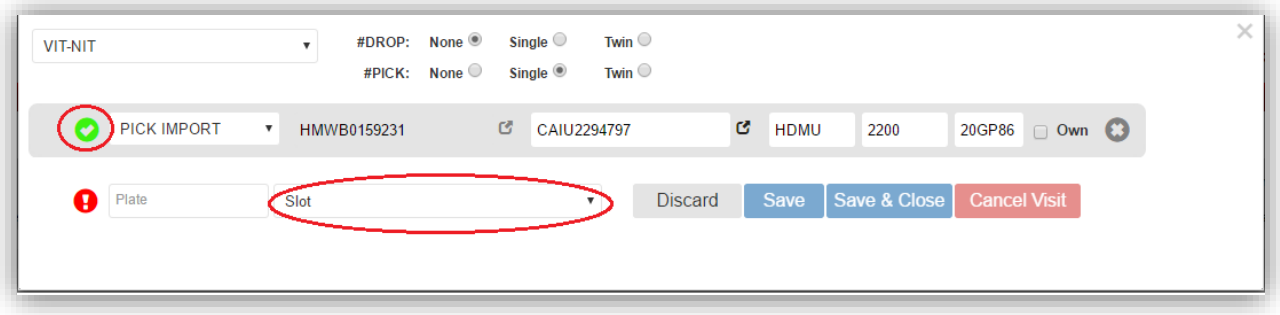
a. First, the user will select the terminal they wish to create a PreGate move for. Depending on the specific terminal settings, the availability of move patterns may change from allowing inbound and outbound movements, or simply unidirectional moves.
b. Then the user may have the option to then select None, Single, or Twin container move type for Drop-Off and/or Pick-Up. As move types are selected, the allowable lines of input below will increase or decrease depending on selection.
c. After all information has been entered, a notification icon will display and indicate if the entered information is valid, a green check mark icon should display. If a red exclamation mark icon is displaying, the user will need to click on that icon which will then show the error message. For example:



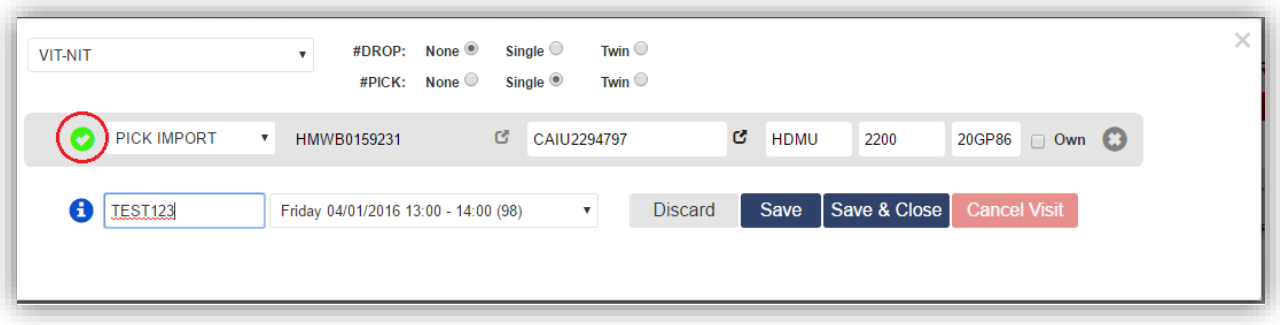


Once the move(s) have been inputted with valid data, the user should see a green check mark icon display. A user may view additional container details by clicking on the icon to the right side of the Container field.

If a green check mark icon displays, the user will then be able to proceed with creating the PreGate move by selecting the next available time slot from the **Slot** drop down.



Once the desired time slot has been selected, the user will then be able to submit their PreGate move. The available options are to select either the **Save** button (which allows the user to submit their PreGate move and continue to create additional moves), or to select the **Save & Close** button (which closes out the visit details window and returns the user to the My Gate Moves screen). If desired, the user may also select the Discard button to abandon their PreGate Move attempt.

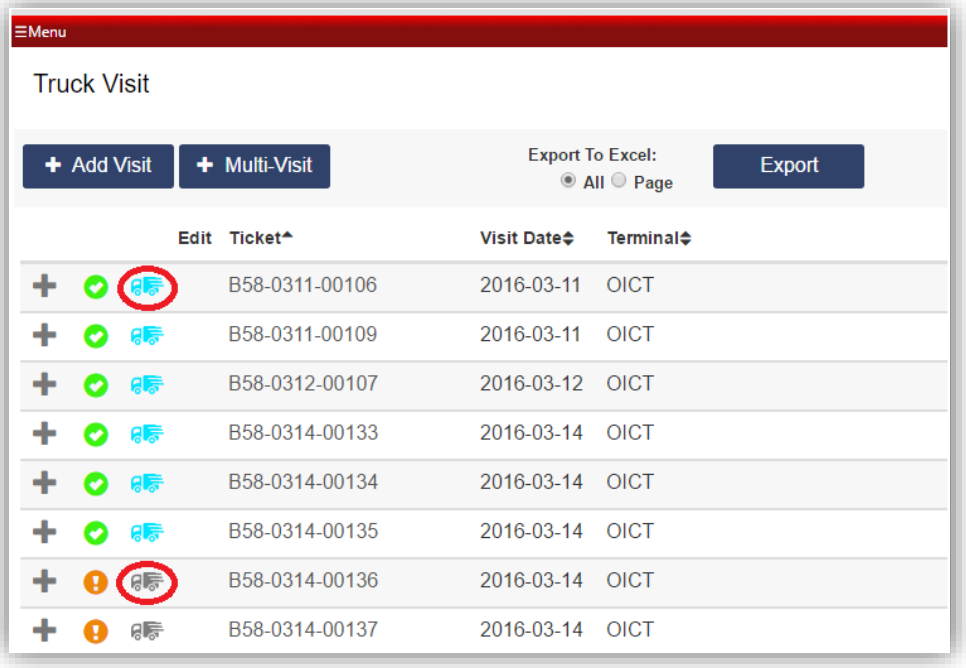


Note: The **Cancel Visit** button will not be enabled until a PreGate request has been submitted. This option will only be enabled when attempting to 'Edit' a pre-existing visit.

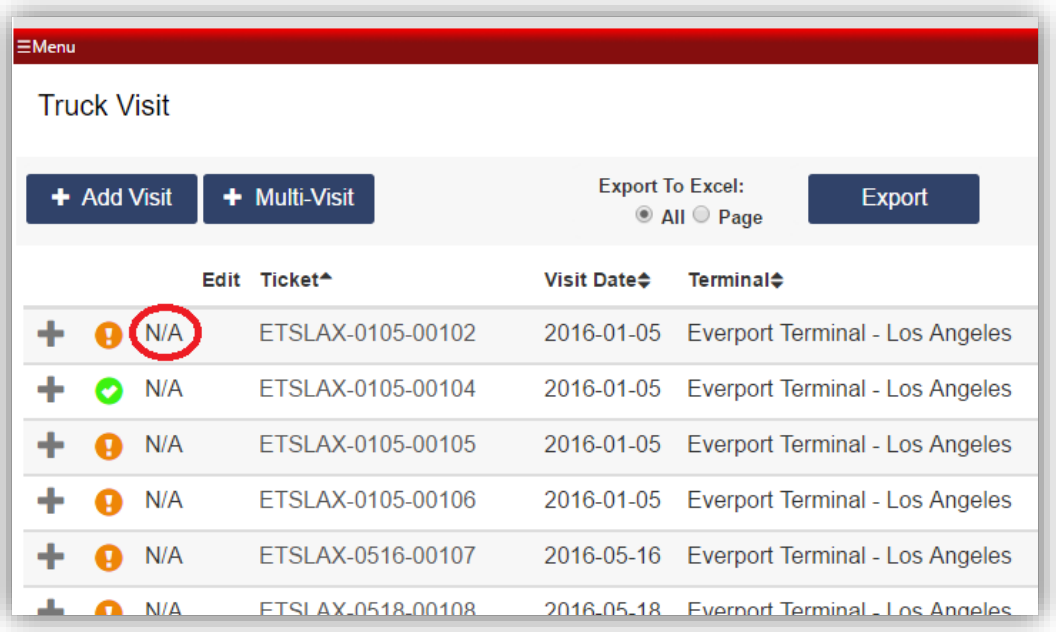
2.1 How to Create an Auto Gate Move

Some terminals may further participate and allow for an Auto Gate Move (aka Speed Gate, Auto-In Gate, Easy Gate, etc., depending on terminal terminology) that allows for creation of non-scheduled PreGate, meaning that only a PreGate date is required, without a time slot. This is only if terminal specific Auto Gate information are inputted and met prior to gating in.

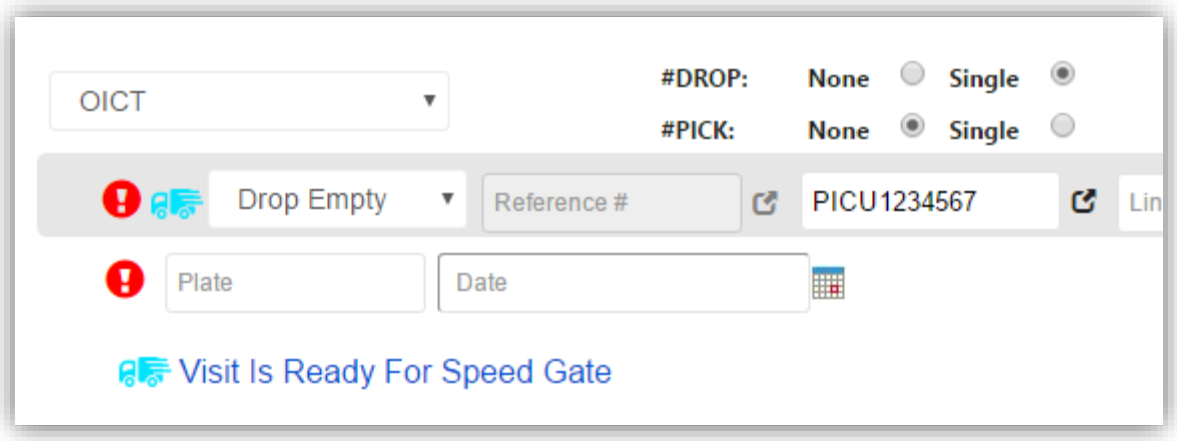
A terminal that participates in Auto Gate, you will have a truck symbol in blue (ready) or grey (not ready), depending on status of the Auto Gate

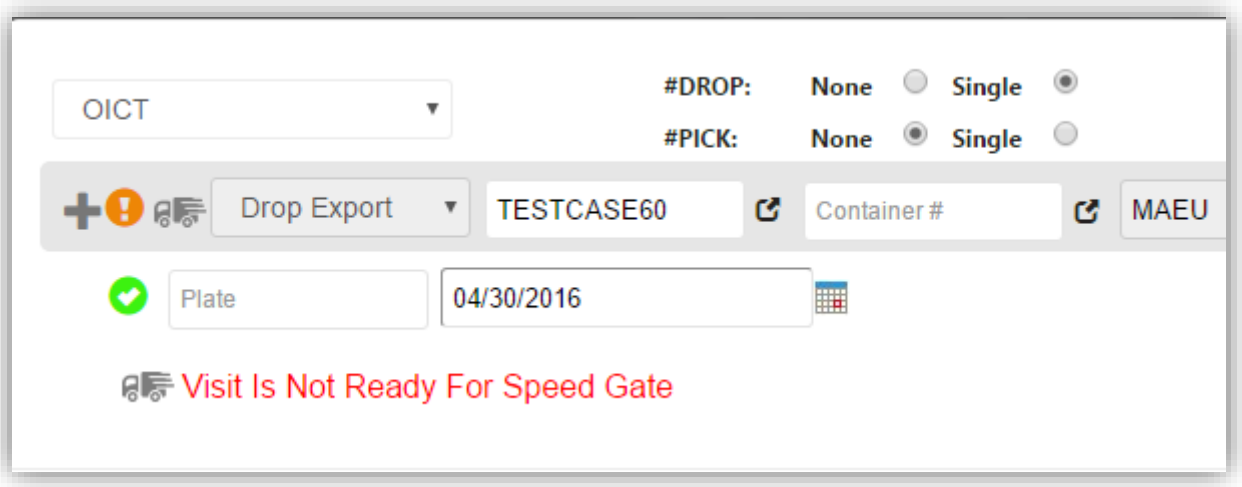


A terminal not participating in Auto Gate, or a shipment that is not Auto Gate eligible, you will see an “N/A” in the Auto Gate column



You create an Auto Gate just as you would a standard PreGate, but upon selection of a slot, you will only be given the option of selecting a date, without the necessity of a time slot. You will also see a PreGate status that further informs you that your "Visit is Ready for Speed Gate" or "Visit is Not Ready for Speed Gate"

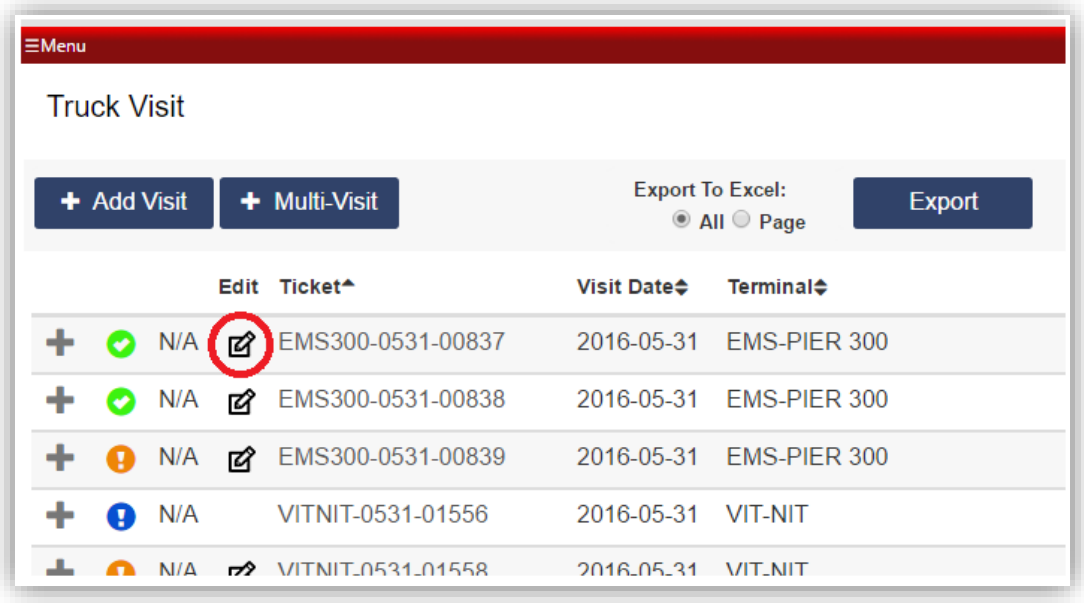




Upon Input of your PreGate Auto Gate information, you would **Save** or **Save & Close** as you would a standard PreGate

3. How to Edit a PreGate Move:

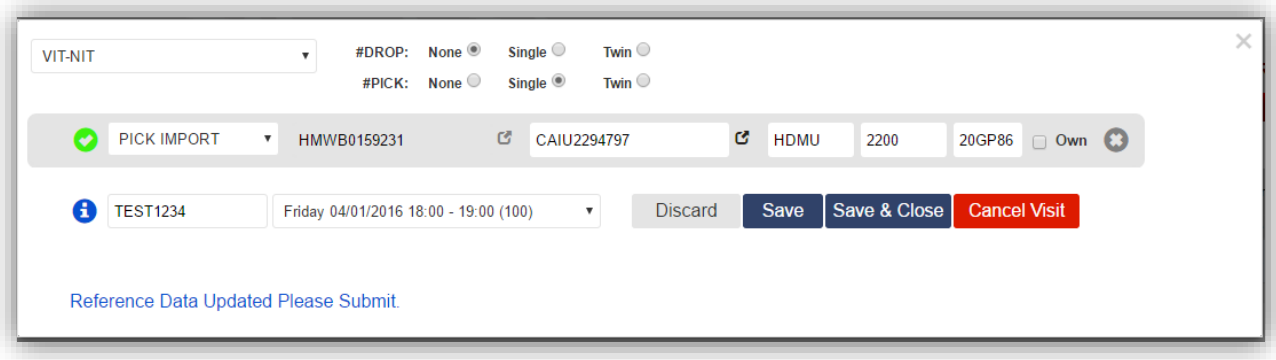
A user may edit an existing PreGate move from the My Gate Moves screen up until the END TIME of the slot time selected. The user will need to select the 'edit' icon (highlighted below), which will generate a pop-up displaying that gate move.



The user will then be able to edit any details as necessary and save their changes.

Notes: Changing certain information, such as the date/time slot, may alter the PreGate ticket number. Please be sure to note any changes.

If you will not be able to Gate In/Out by your PreGate slot, you must edit before the end, or your PreGate will be marked as "**MISSED**" **AFTER** midnight that evening, and you will not be able to make a new PreGate for that container until it is marked as MISSED.



Additionally, the user may select the **Cancel Visit** button if they wish to cancel their existing PreGate move request. (**see** Section 4. How to Cancel a PreGate Move)

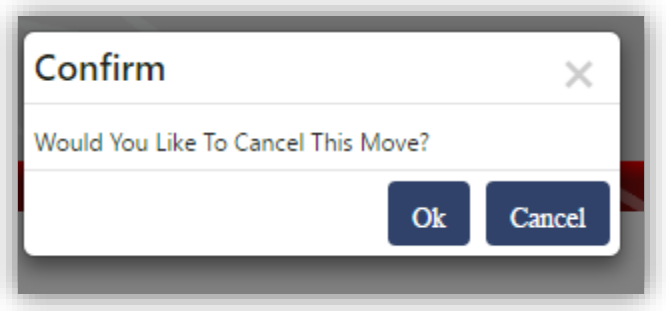
4. How to Cancel a PreGate Move:

You can cancel a PreGate visit from either the main My Gate Moves, Truck Visit, or in the Add-Edit view. All will require that you confirm cancellation before the cancellation is executed.

4.1 Cancellation from Page

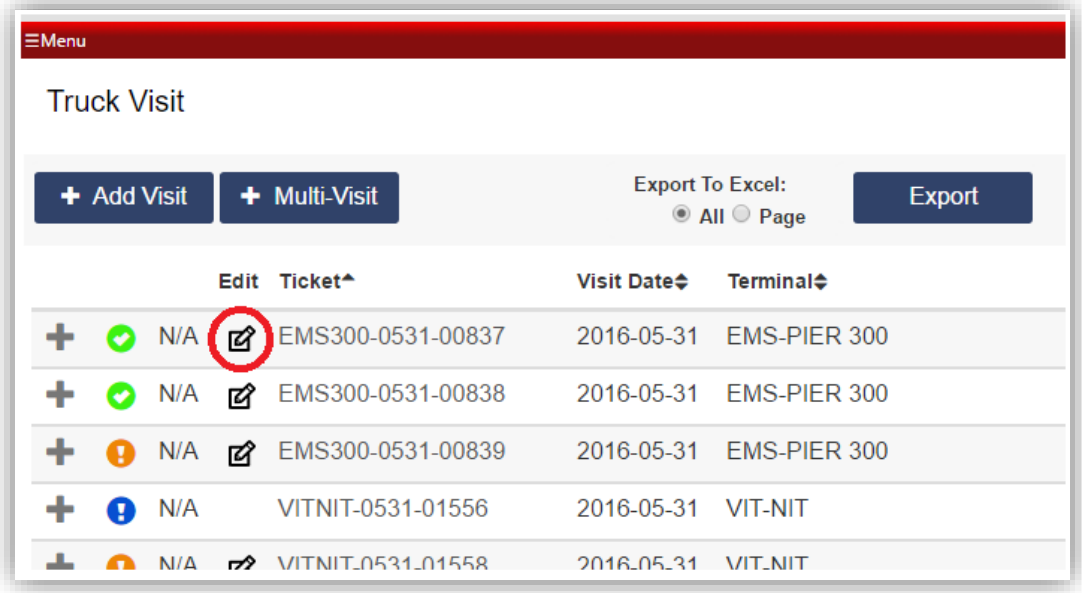
From the screen, the user can select the delete icon (x), which will cancel the move. After the user has selected to cancel a move, they will receive a confirmation request on the following pop-up to click OK or Cancel

Note: If the trash can icon is displaying in a light red color, it is an indication that the user will not be able to cancel the move as it is already missed and not active


Confirm
Would You Like To Cancel This Move?
Ok
Cancel

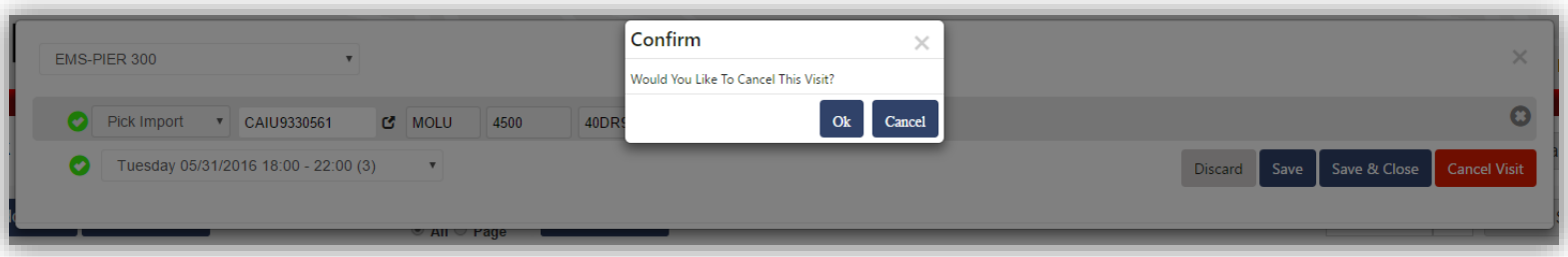
4.2 Cancellation in Edit Mode

To make a cancellation in Edit mode, the user must select the edit icon on the My Gate Moves screen (if available) and then choose the **Cancel Visit** option.



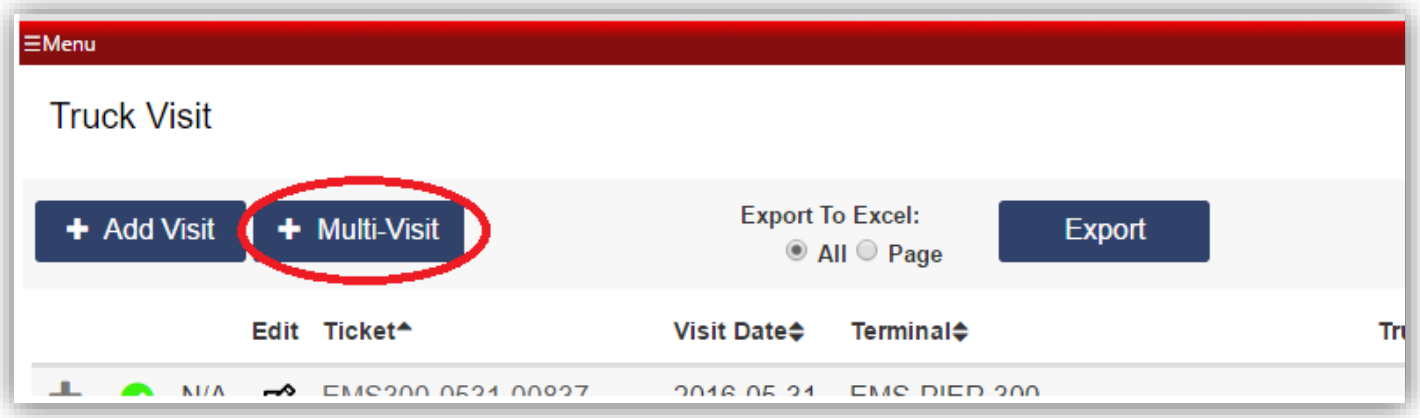
It will bring you to the Add/Edit Visit popup, where you will click on the Cancel Visit button.

Upon confirmation, the move will be cancelled.

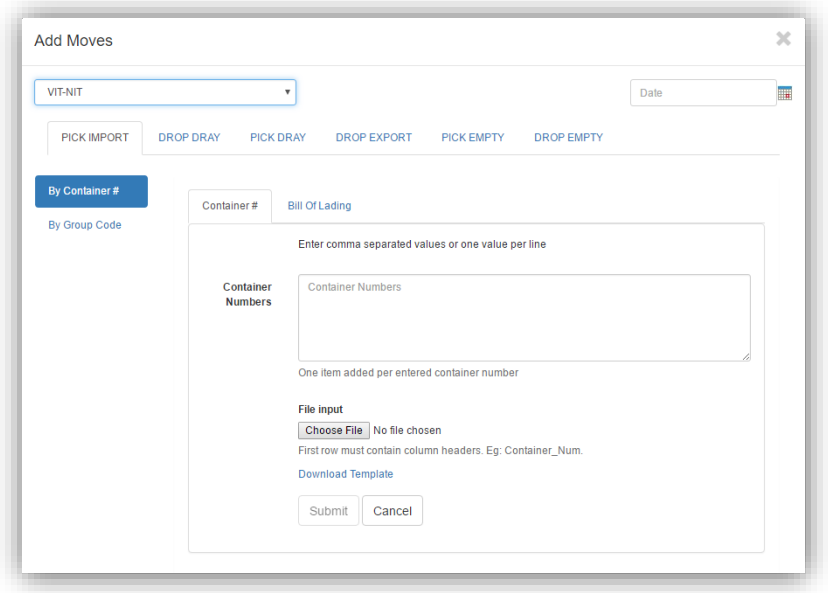


5. **Multi-Visit Create**

For large volume of visits, you can utilize the **Multi-Visit** functionality by clicking on the **Multi-Visit** button



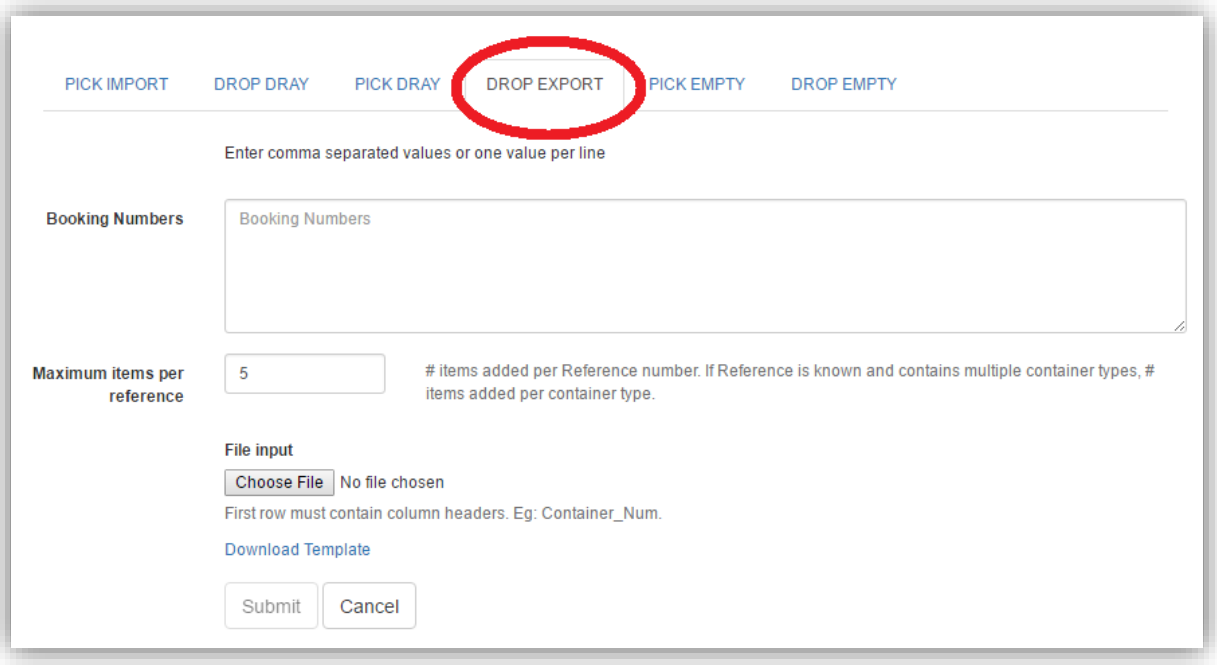
Once the Multi-Visit function has been selected, a pop-up of the multi-visit add moves input screen will appear. Different tabs and options are available for different terminals based on move types allowed and other specific requirements.



Each terminal can have up a maximum of six different move types:

PICK IMPORT
DROP DRAY
PICK DRAY
DROP EXPORT
PICK EMPTY
DROP EMPTY

Selecting the individual tabs (i.e. Drop Export) will bring you to the specific options for that move type



5.1 Inputs per Move Type

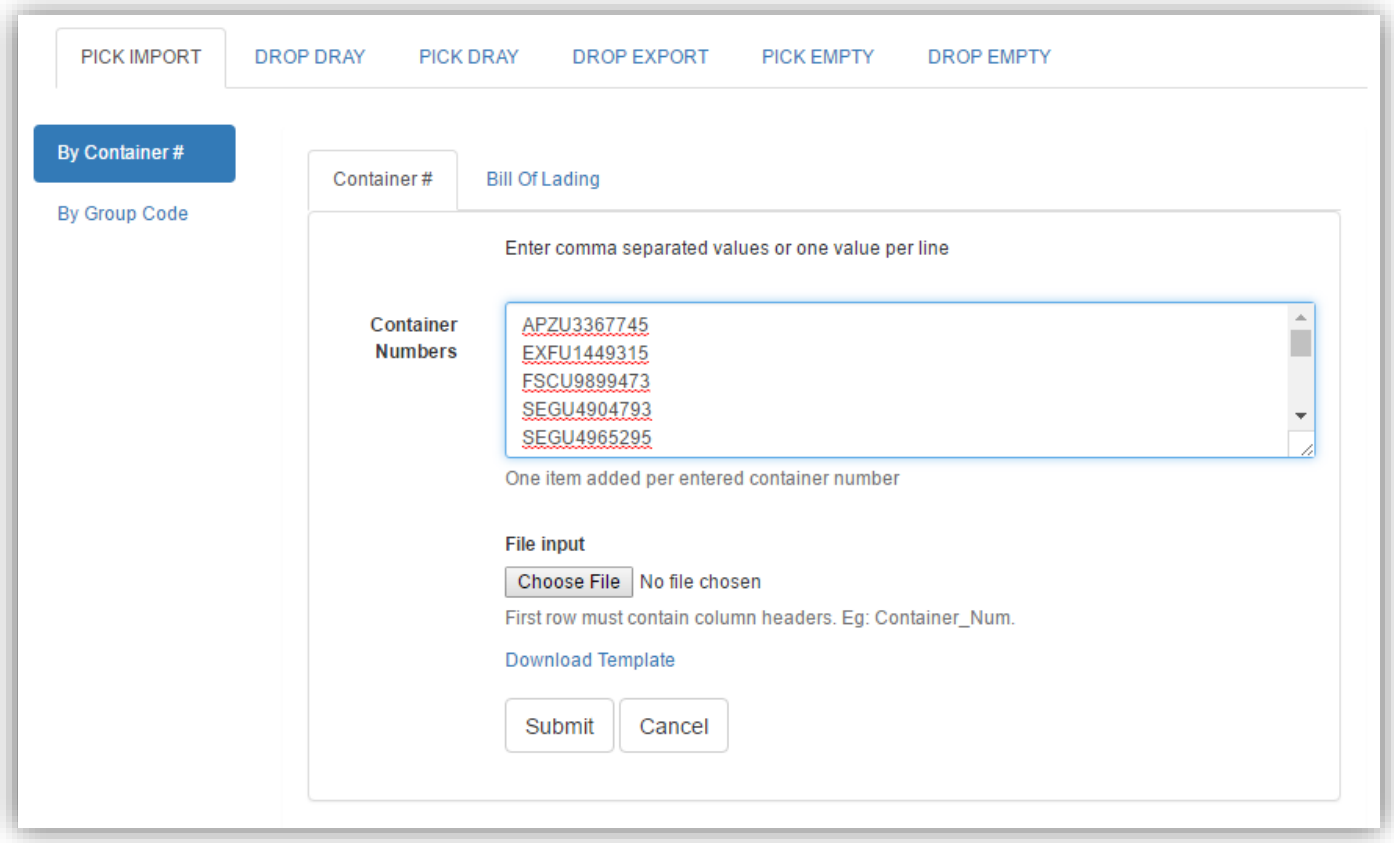
You can input different values based on these types:

Type	Inputs
Pick Import (pick up full load from terminal)	Container numbers, Bill of Lading numbers, Group codes
Drop Dray (drop inland drayage into terminal)	Container numbers

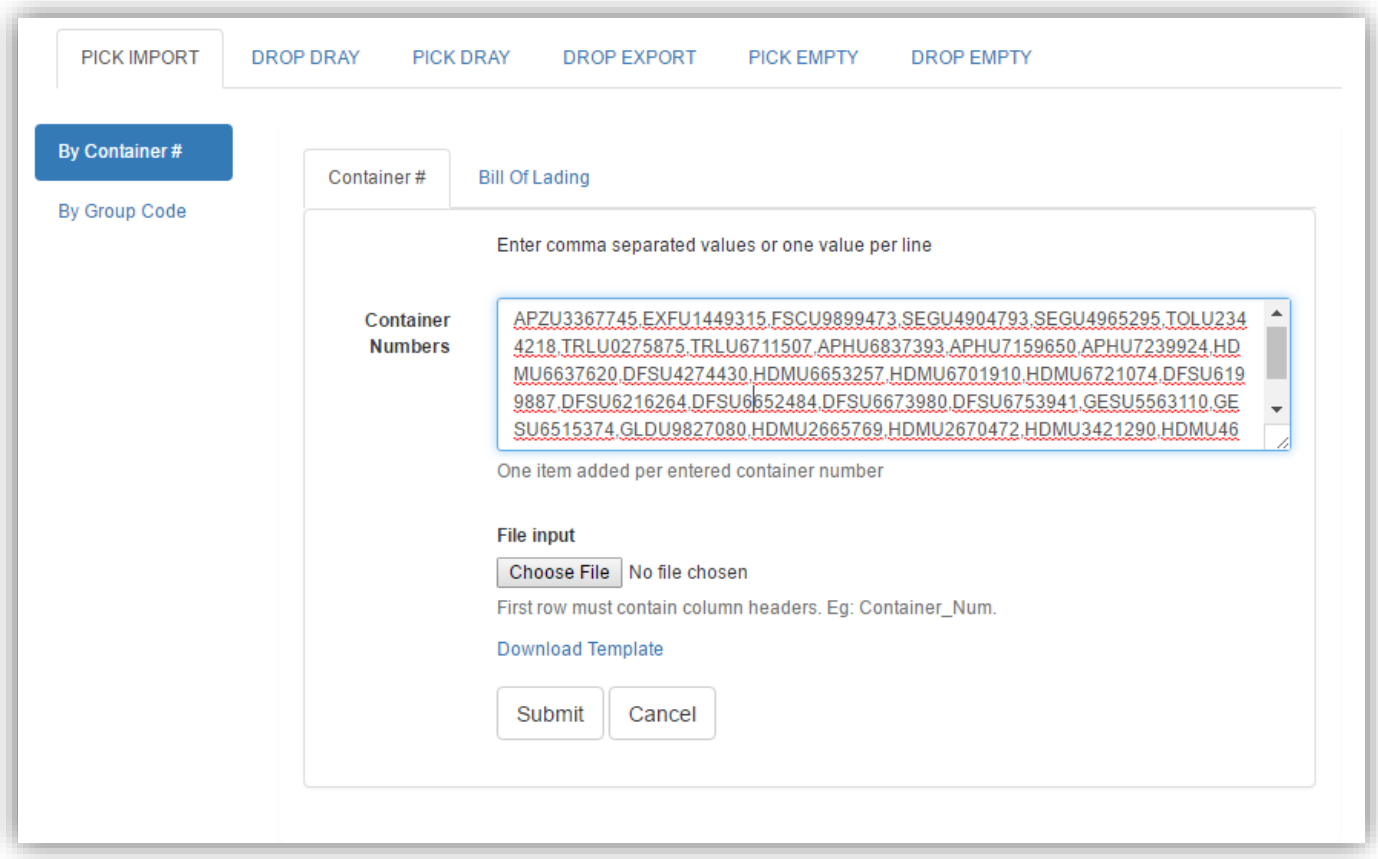
Pick Dray (pick up inland drayage container from terminal)	Container numbers
Drop Export (drop full load into terminal)	Booking numbers
Pick Empty (pick up empty container from terminal)	Reference numbers (i.e. EDO numbers)
Drop Empty (drop empty container into terminal)	Container numbers

You can cut and paste container numbers from an Excel sheet (or any other list) into the input field in a single column format, a comma separated format, or mix of single and comma, and click submit

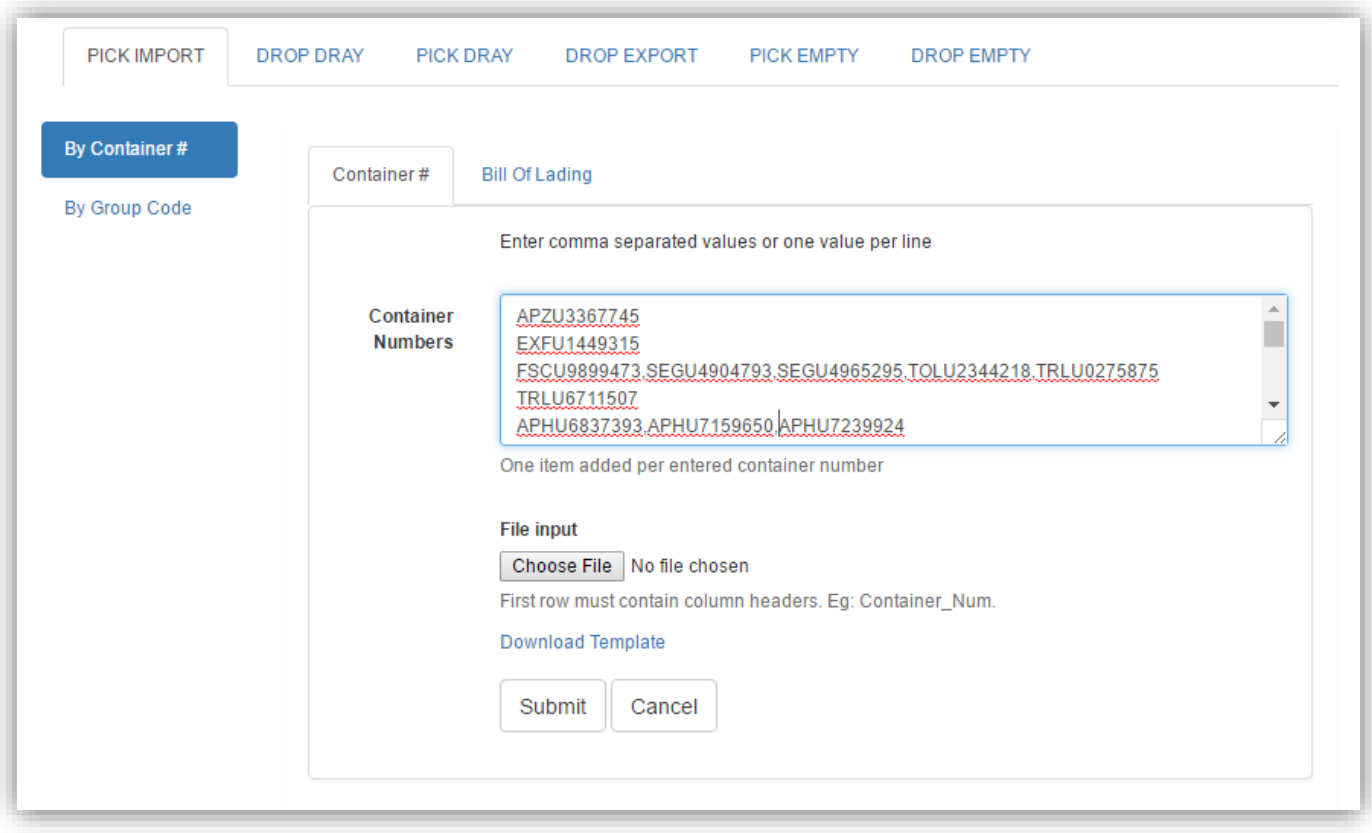
Single Line Input



Comma separated Input

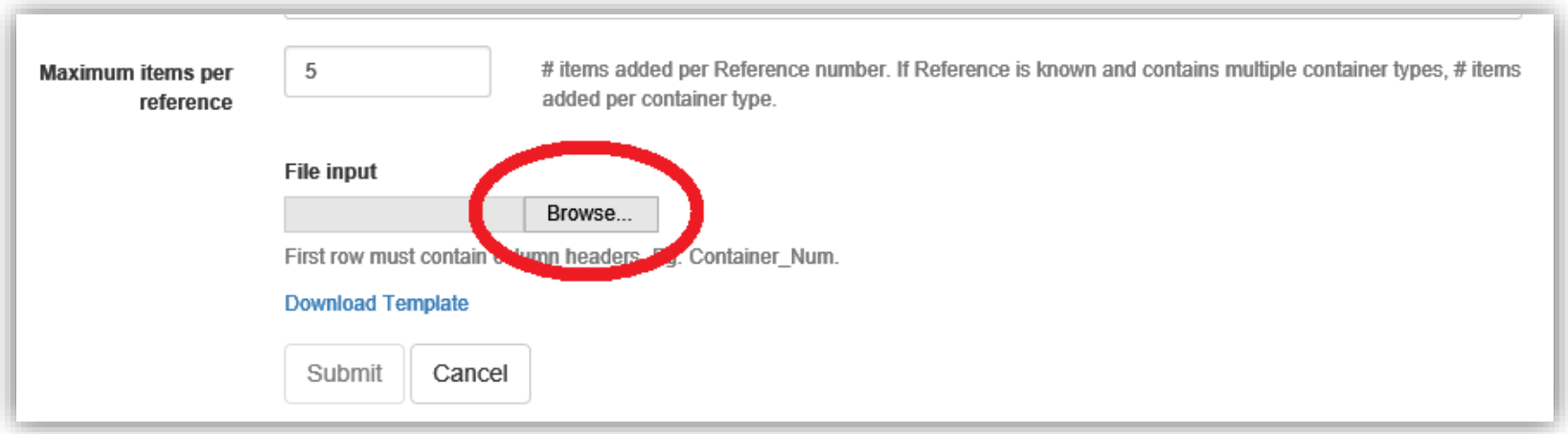


Combination of single line and comma separate input

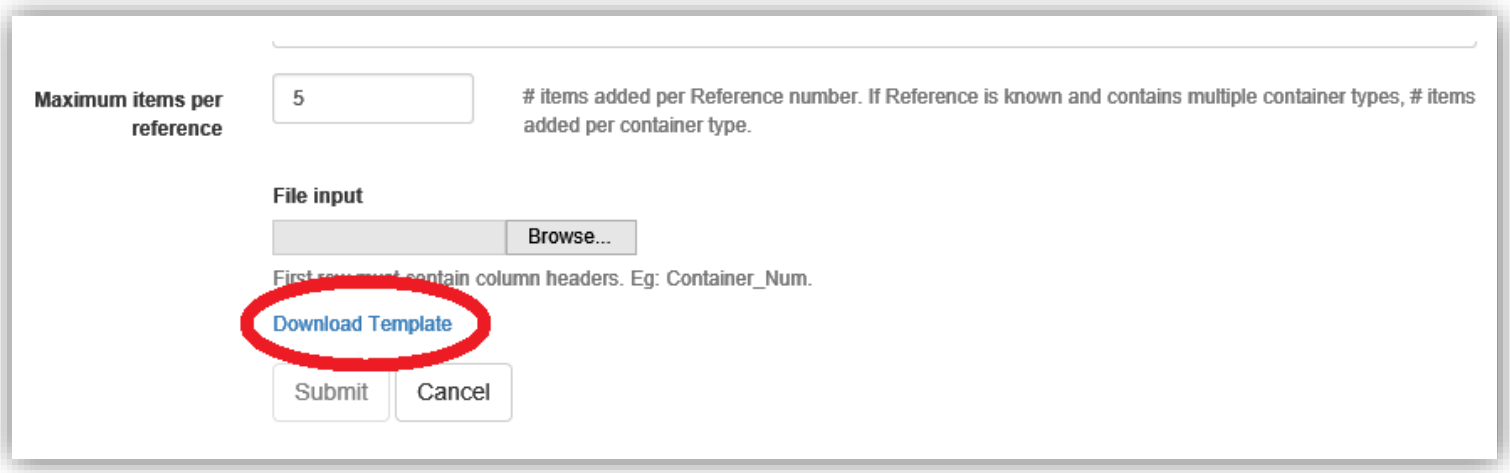


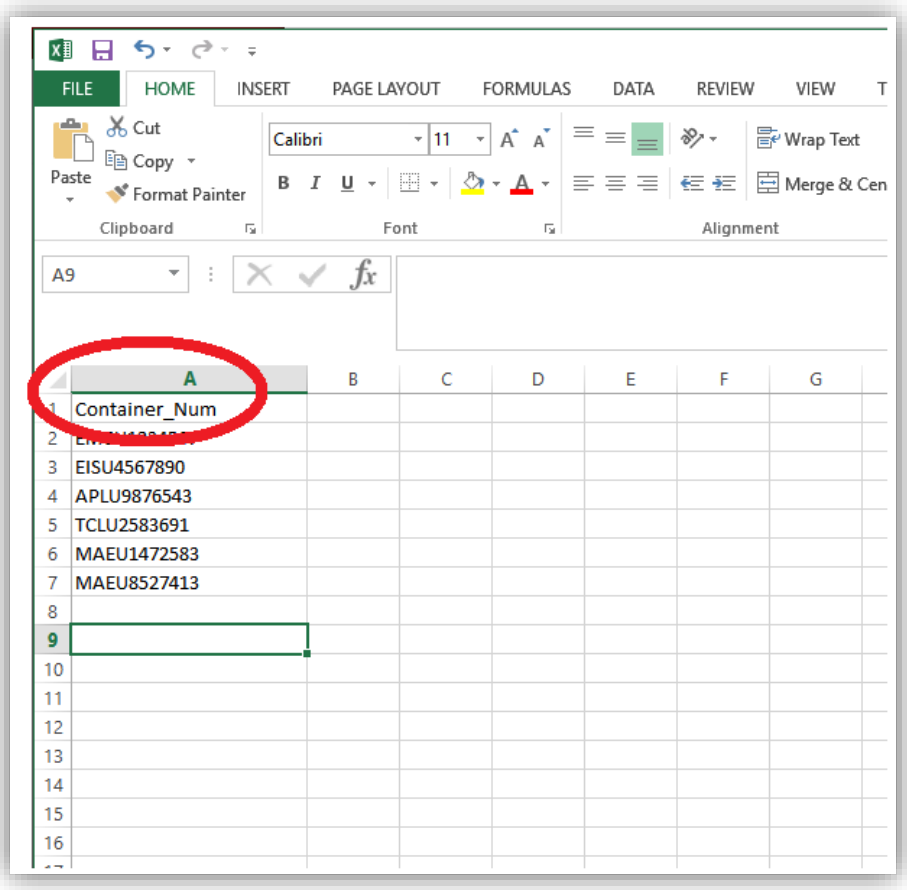
5.1.1 Uploading Excel Files

Depending on move type, you will have further actions and ability to upload an Excel spreadsheet of values. Click on **Browse** and select an Excel file from your computer and click okay. The file location will then display in the location field to eModal and then click **Submit** to process the file. The first row of the file must have a header column, examples Container_num, Booking_num, etc. The actual value is not important, you could use "HEADER" as the value to put into the cell.



You also have the option to download a template. The template will download to your computer to be completed with container numbers or references in column A. Make sure you **DO NOT** remove the header row 1. Start filling into information starting with row 2.





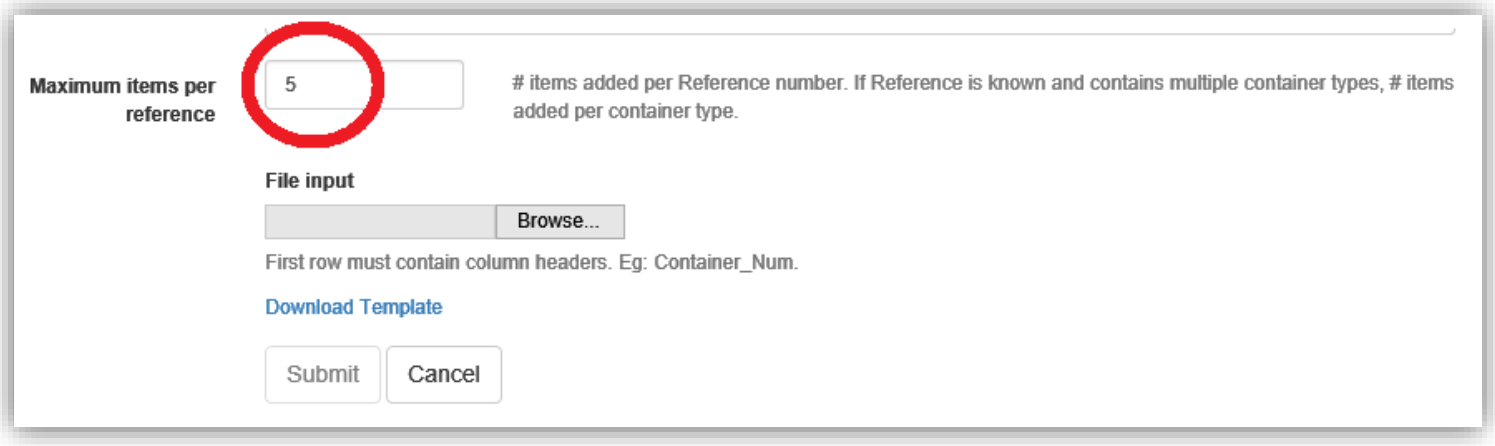
Upon completion of input, save the list to your computer and upload as an Excel spreadsheet as outlined in the beginning of this section.

5.1.2 The Maximum Items per Reference

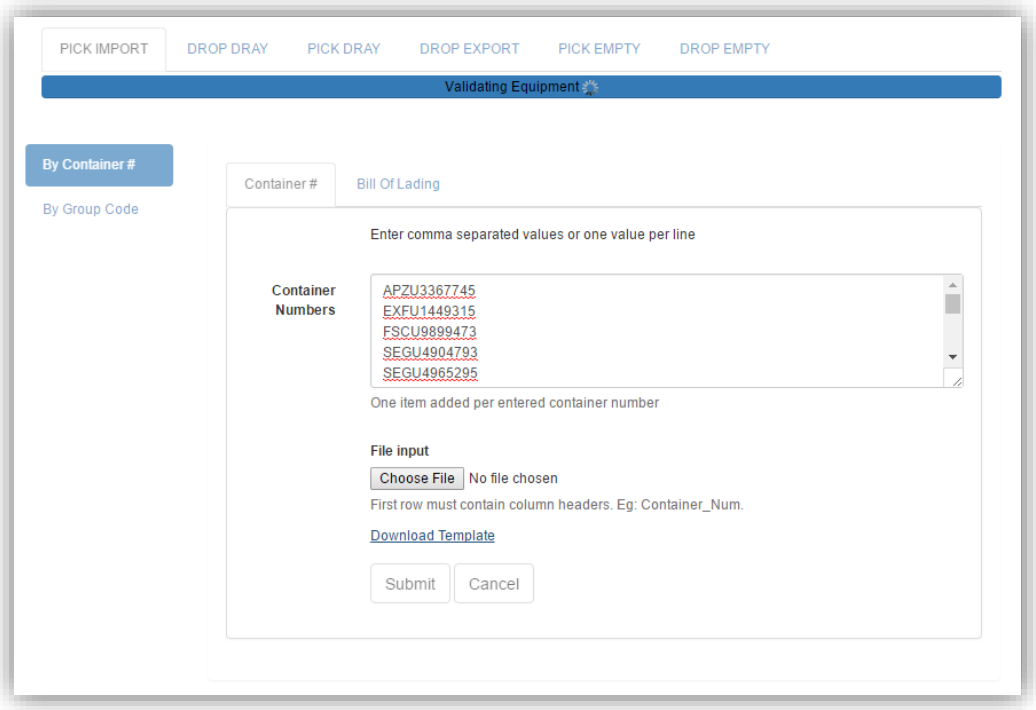
For moves types that have references (Booking, EDO, etc.) that allow for more than one container to be picked/dropped, you have the ability to specify how many instances to create. Example, if you have a booking allowing for two hundred (200) containers, you can input the booking number and specify that you want to create twenty (20) PreGates. Then click on submit and the system will create twenty blank PreGates for that one appointment.

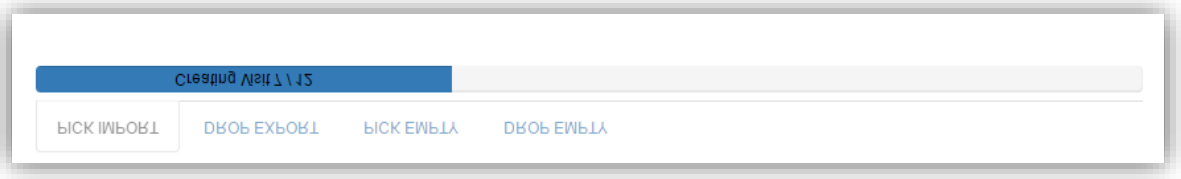
The value inputted is across all references inputted, so if you input ten (10) bookings, and each allows for fifty (50) containers, and you leave default as five (5), then there will be fifty (50) PreGates created because of the ten bookings multiplied by five instances per booking.

If you have a booking with less containers available than the maximum, the system will create only up to the amount still open. If a booking is only open for two containers, and you have maximum as five, only two PreGates will be created for edit.



Once you have completed all inputs and submitted inputs for edit, you will see a progress task bar (in blue) indicating the progress from validating to edits created, and then completion

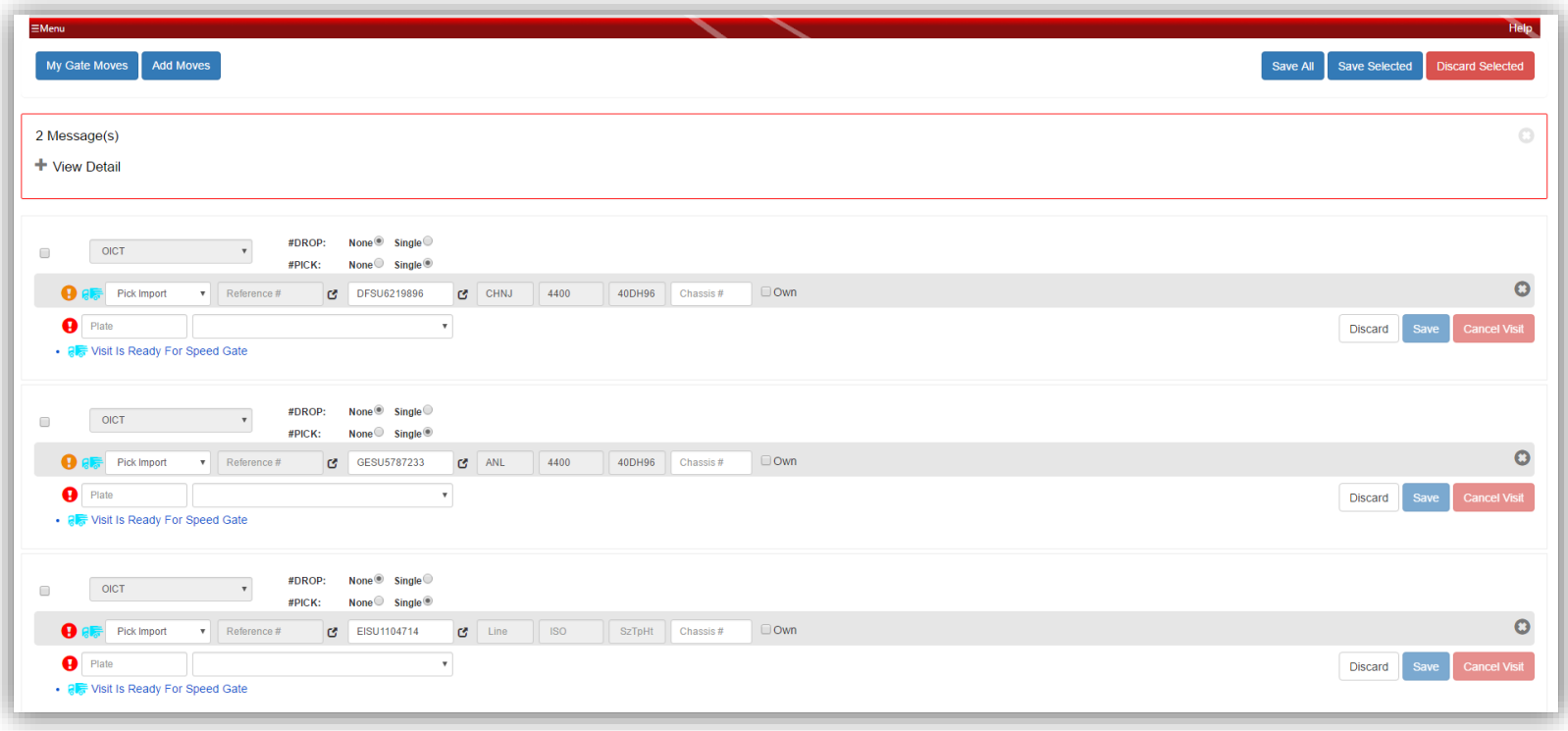




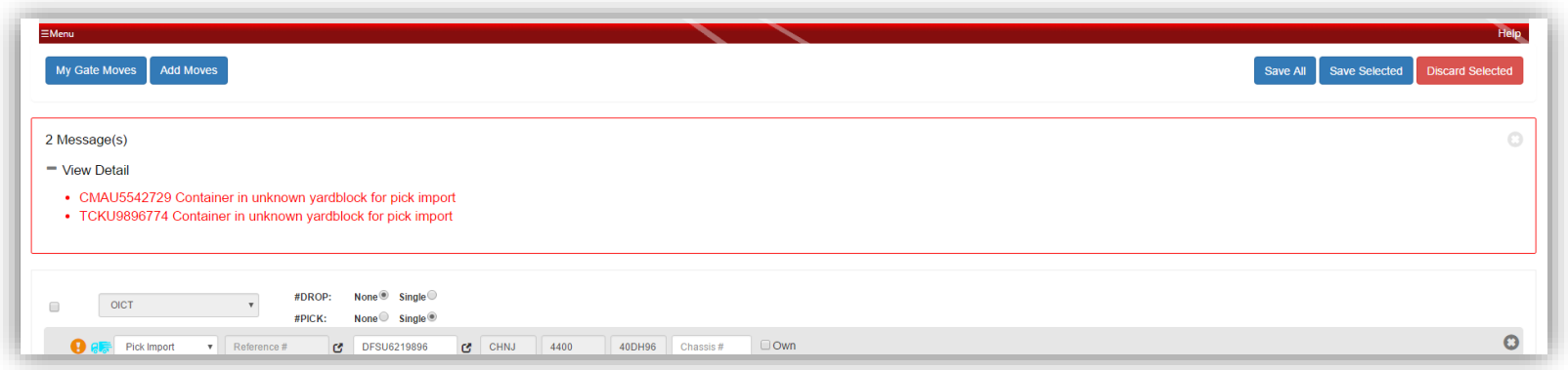
Once upload is completed, you will be returned to the Muti-Visit input panel

5.1.3. Multi-Visit Input Panel and Message Window

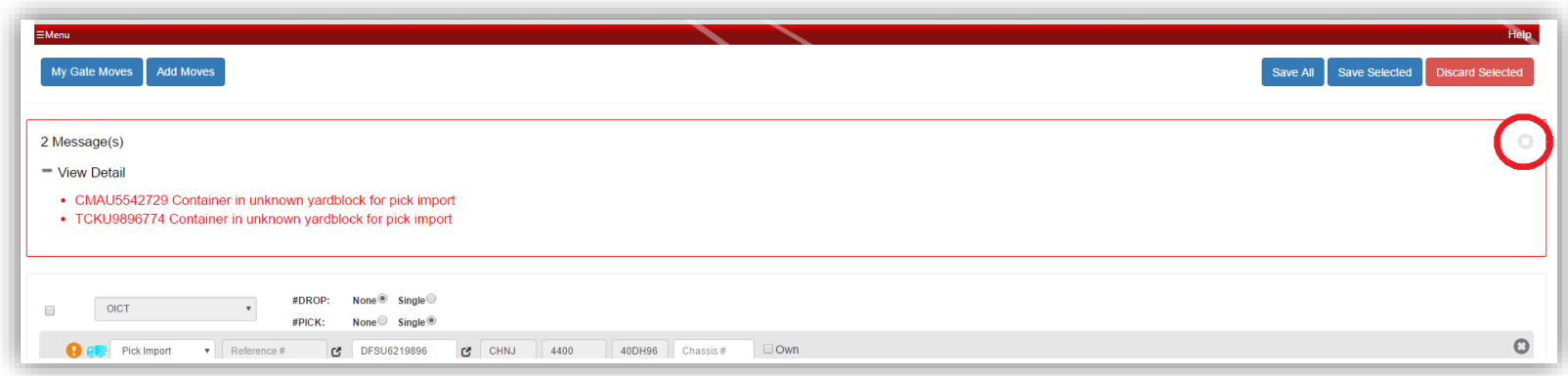
After completion of loading of the Multi-Visit inputs, you will enter the Multi-Visit Input Panel. Here you will complete/modify/remove the multi-visits that have uploaded, and be able to see the inputs that did not load in the Message Window.

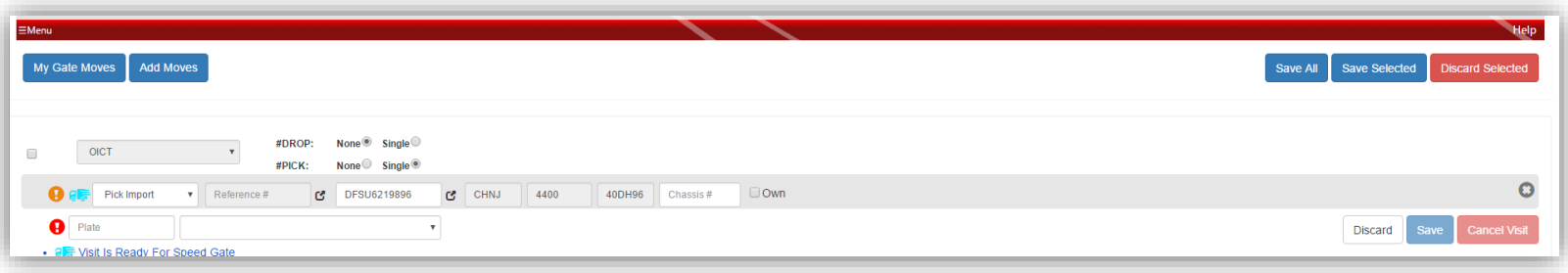


Clicking on the (+) symbol to the left of View Detail will expand the Message Window to show detail messages of why certain inputs failed

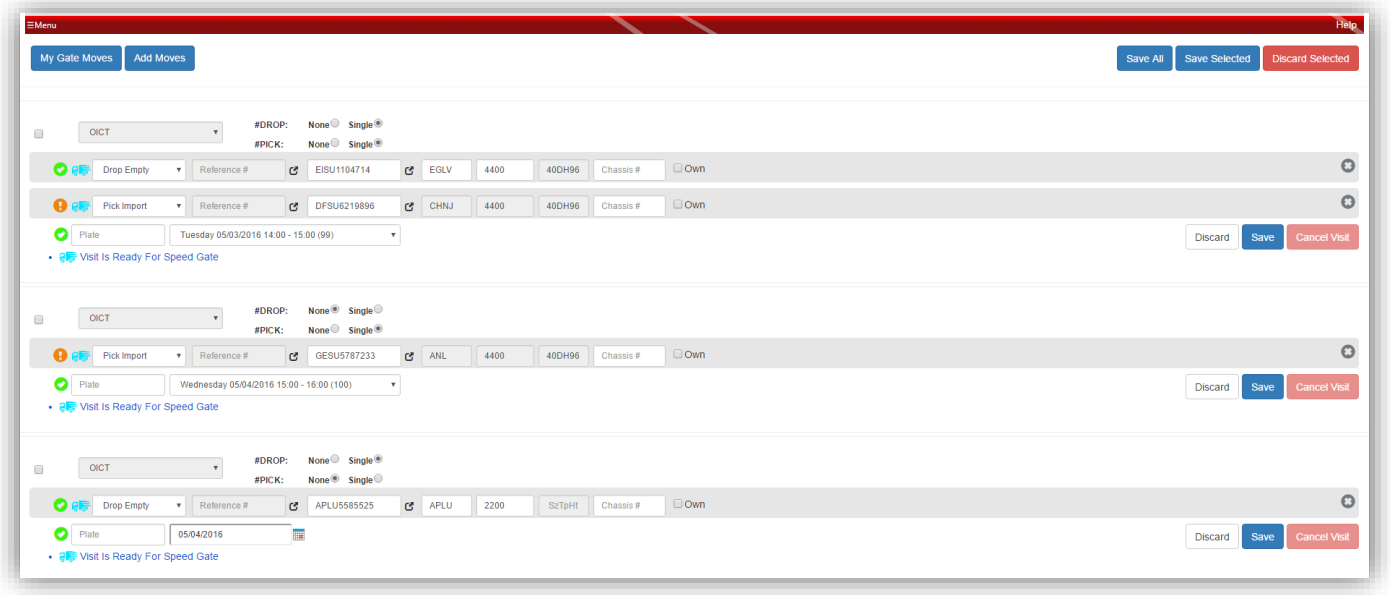


Depending on how many messages are in the window, clicking the (**X**) on the top right of the message window will close the message window. Do not close if you have not viewed all errors, as the window cannot be reopened once closed.



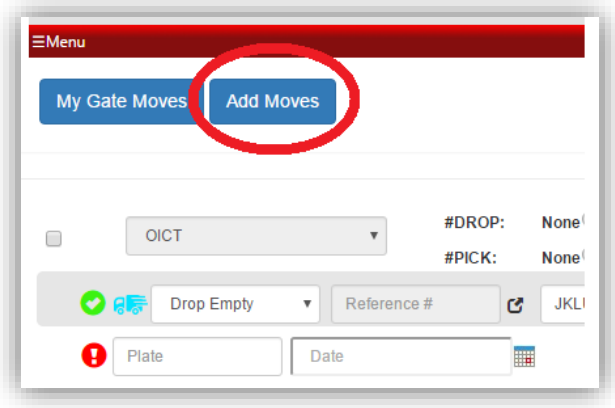


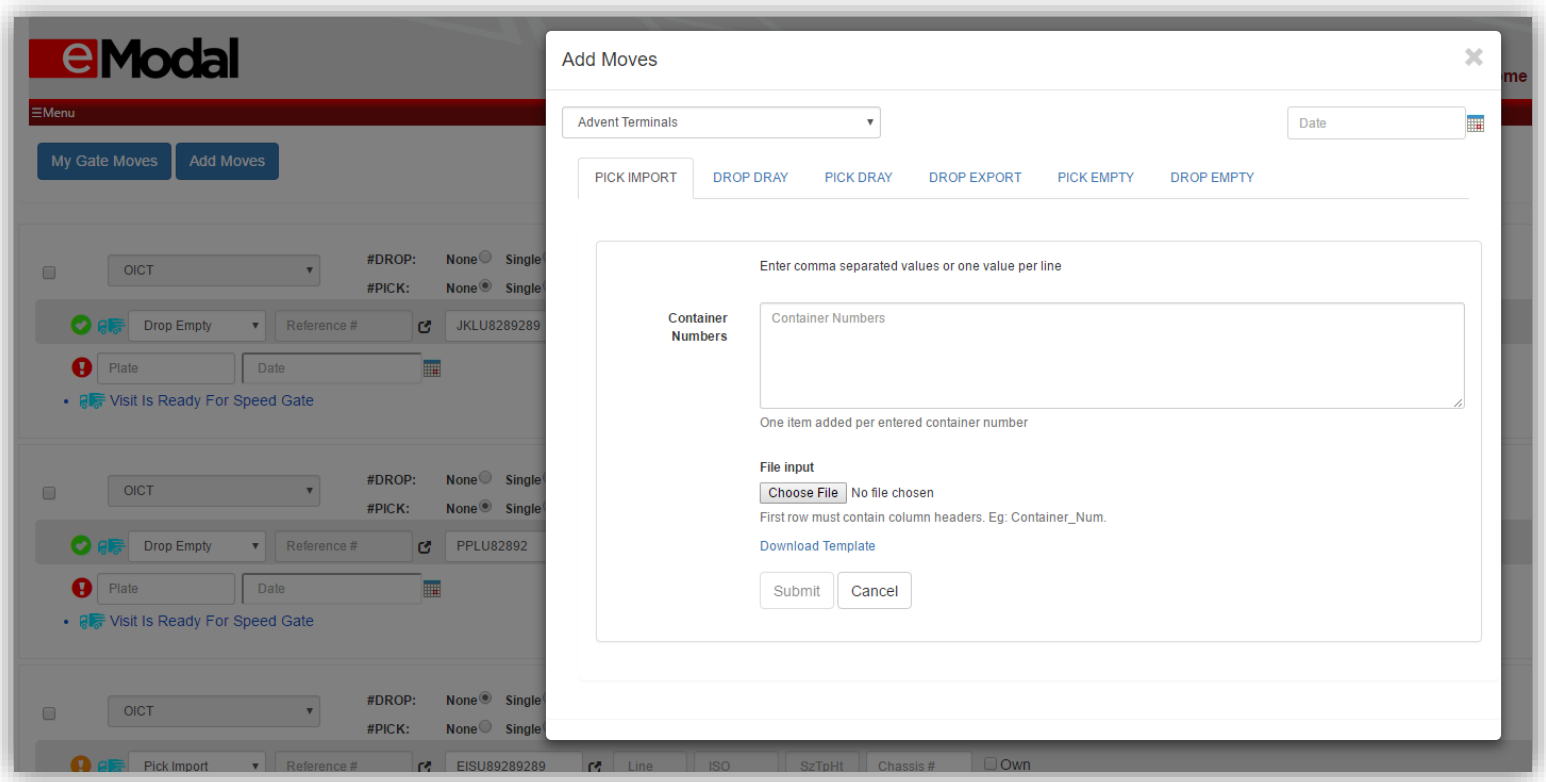
You can now complete each of your Multi-Visits the same as you would in section 2. How to Create a PreGate Move or 2.1 How to Create an Auto Gate Move. You can also select a dual move in the individual Multi-Visit if that terminal allows for dual/double ended moves



5.1.4. Add Moves

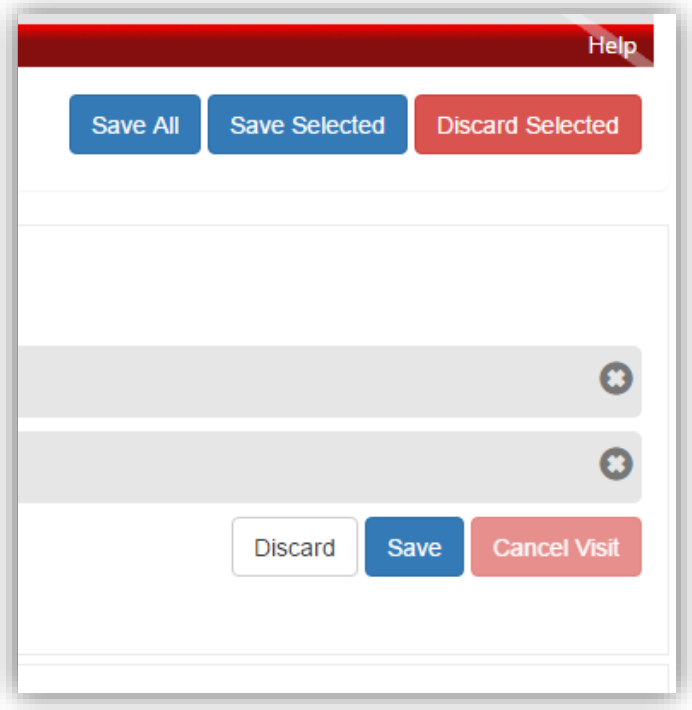
If you have more move types that you wish to add before submitting for final validation and submit, you can click on Add Moves to bring up the Multi Visit Create screen again. Keep in mind, you can load all of your days moves from various terminals during one session, and then perform one Save All. You don't have to complete multiple sessions one at a time.




eModal
Menu
My Gate Moves
Add Moves
OICT
#DROP:
#PICK:
None
Single
Drop Empty
Reference #
JKLU8289289
Plate
Date
Visit Is Ready For Speed Gate
PPLU82892
Pick Import
EISU89289289
Line
ISO
SzTpHt
Chassis #
Own
Add Moves
Advent Terminals
Date
PICK IMPORT
DROP DRAY
PICK DRAY
DROP EXPORT
PICK EMPTY
DROP EMPTY
Enter comma separated values or one value per line
Container Numbers
Container Numbers
One item added per entered container number
File input
Choose File
No file chosen
First row must contain column headers. Eg: Container_Num.
Download Template
Submit
Cancel

5.1.5. Submitting for Validation

After you've completed all inputs, you can select final actions of:



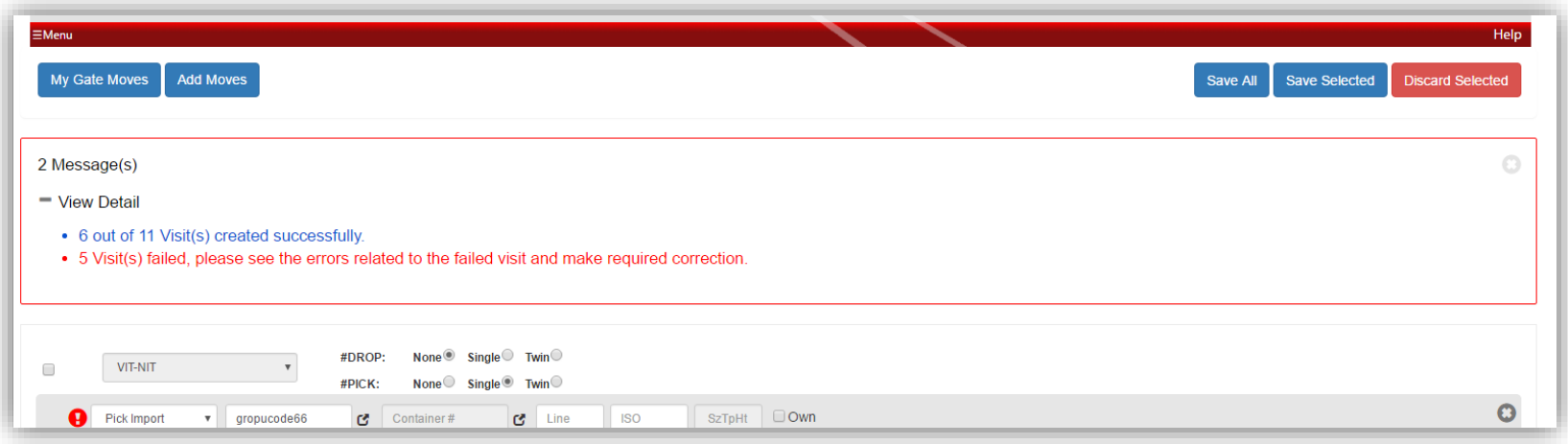
On the top right page command:

Save All – submit all the Multi-Visits you have completed for final validation and PreGate / Pre Arrival
Save Selected – submit the Multi-Visits that were checked off to be valdated
Discard Selected – remove the Multi-Visits that you do not want validated

On the individual Multi-Visits:

Discard – remove the Multi-Visit
Save – individual submit for final validation
Cancel Visit – cancel this previously approved PreGate/Pre Arrival, only available if editing an existing PreGate/Pre Arrival, not available on initial create.

Upon submitting and completion of all validations, you will received a new message in the Message Window informing of any errors, or how many visits were created. To open the view, click the (**+**) icon next to View Detail



6. Key of Icons:

: Edit PreGate Move

: Indicates that the PreGate data is valid

Note: be sure to check the PreGate status column to verify move status.

: Informational message

: Warning message, meaning warnings should be cleared prior to gate time to ensure a successful transaction

: Indicates that the PreGate Move has errors that must be tended to or you will not successful gate

: Active icon indicates that the PreGate Move can be cancelled

: Inactive icon indicates that the PreGate Move cannot be cancelled

: Auto In Gate is successful

: Auto in Gate has warnings

: Container Information icon, click to view container information

Document Control (amendment history & version control)			
Version	Date	Amended By (name)	Reason
1.0	Mar. 31, 2016	Advent	Created
2.0	Apr. 29, 2016	Advent	Added Multi-Visit functionality
2.1	May 6, 2016	Advent	Additional notes to Sec 3 for MISSED PreGate
3.0	June 14, 2016	Advent	Screenshot change for new UI enhancements and © PreGate