



User Guide



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1 Revision History

Version #	Date	Description	Author
1.0	7/31/2010	Initial document	Rajesh Kota

2 Introduction

This User Guide is designed to assist Motor Carriers in their usage of the TRAC Connect System.

3 Accessing the TRAC Connect System

The TRAC Connect can be accessed through any of the browsers listed below:

- Microsoft Internet Explorer 6.0 or later versions.
- Mozilla Firefox version 1.5 or later versions.

The URL for the application is: <https://www.traconnect.com/>. The following page is displayed when you access the website.

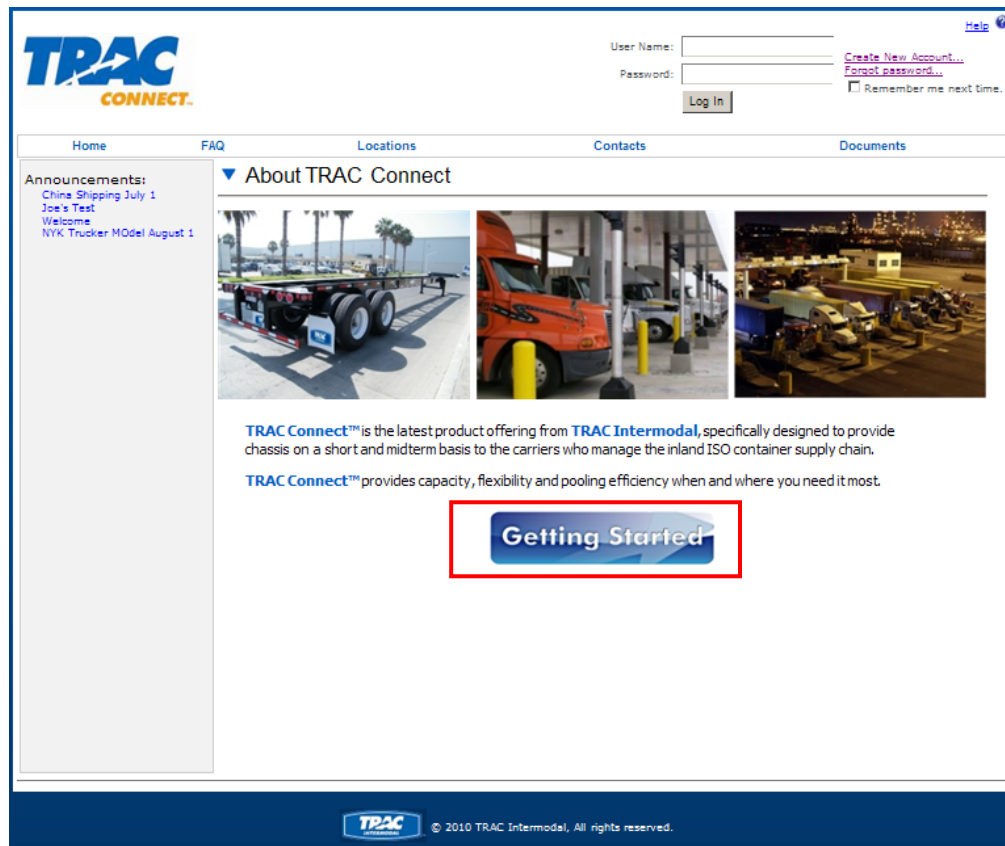


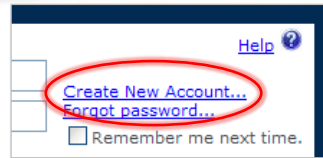
Figure 1 – Home Page

3.1 Getting Started

Clicking on the “Getting Started” button will cause the system to display a series of easy to follow instructions on setting up an account and registering your company. Figure 2A, 2B, 2C and 2D display sample instructions that are included in the “Getting Started” guide.

Step 1: Create an account

- Navigate to www.tracconnect.com and click “Create New Account...”



- Fill out the required fields and click “Create User”

* Phone Number:

Fax Number:

* Security Question:

* Security Answer:



Figure 2A – Getting Started guide – Create an account

Step 4: Complete your company profile

- Click the “Create Company” menu item



Figure 2B – Getting Started guide – Create Company

Step 5: Provide proof of insurance

- Add TRAC Intermodal to your insurance policy(s) as additionally insured, as specified in the Documents/Rules directory
- Click the “Documents” tab

- Click the top “Add” button



Figure 2C – Getting Started guide – Provide proof of insurance

Step 6: Accept agreement

- Click on the “Agreement” tab

- Review the document and indicate agreement by checking the box at the bottom

I hereby accept the terms and conditions of the TRAC Intermodal Interchange Agreement and [TRAC Connect Rules](#)

- Click the “Save” button

I hereby accept the terms and conditions of the TRAC Intermodal Interchange Agreement and [TRAC Connect Rules](#)



Figure 2D – Getting Started guide – Accept agreement

3.2 Registration

In order to access the system, you must be a registered system user. To become a registered system user, click *Create New Account...* link on the home page or as shown in figure 3.

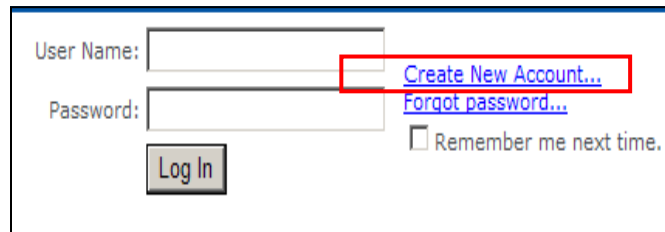


Figure 3 – Create New account link

The system will display the Create an Account screen, show in figure 4A below.

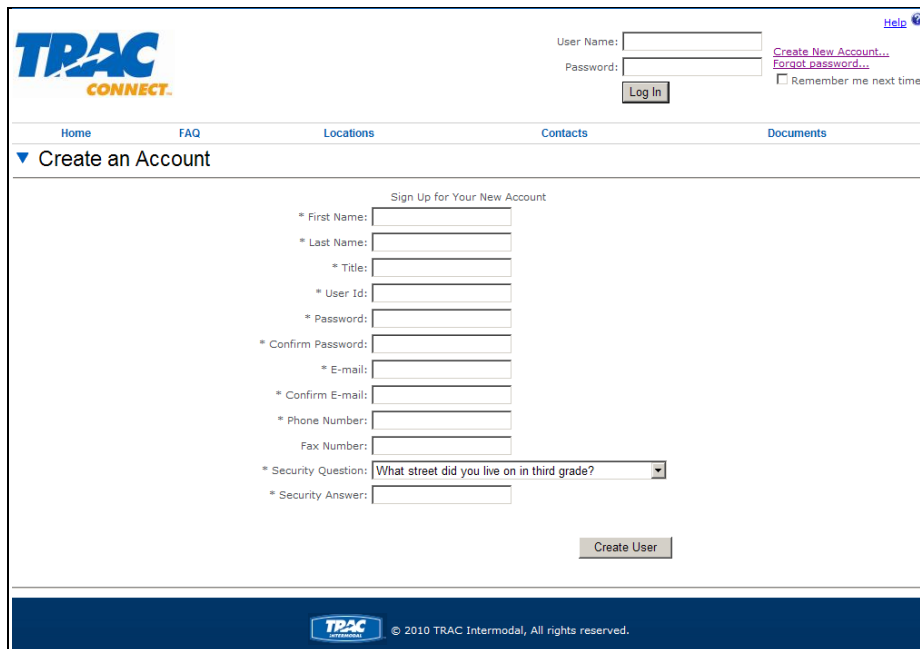


Figure 4A – Create Account screen

Enter details such as your first name, last name, title and a desired entry in the *User ID* field. Fields that are *required* to be populated have an asterisk (*) as part of the label. Specify your password in the *Password* and *Confirm Password* fields, and indicate your e-mail address in the *E-mail* and *Confirm Email* fields. Populate the phone and fax number fields, choose a desired security question and the answer.

As you enter appropriate information in the various fields, the system performs validations to ensure data entered passes validation Criteria. Any error messages are displayed on the bottom of the screen.

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Sign Up for Your New Account

* First Name: Tom
* Last Name: Harbin
* Title: JX
* User Id: tharbin
* Password: *****
* Confirm Password: *****
* E-mail: rkota80@yahoo.com
* Confirm E-mail: rkota80@yahoo.com
* Phone Number: 609-986-0168
Fax Number: 609-FAX-ITUP
* Security Question: What street did you live on in third grade?
* Security Answer: 3rd Street

The Email and Confirmation Email must match.

Create User

Figure 4B – Create Account process – data entry errors

Fix any data entry errors and when ready click on the Create User button to create an account. The system will check for user ID availability. If requested *User ID* is in use by another user, the system will display a message as shown in figure 4C. If the user ID is available, the system will create the account and display a confirmation as shown in figure 4D.

Sign Up for Your New Account

* First Name: Tom
* Last Name: Harbin
* Title: Mr.
* User Id: SCLAUS
* Password:
* Confirm Password:
* E-mail: rkota80@yahoo.com
* Confirm E-mail: rkota80@yahoo.com
* Phone Number: 609-986-0168
Fax Number: 609-419-0064
* Security Question: What street did you live on in third grade?
* Security Answer: 3rd Street

A user already exists with this ID. Please enter a different user name.

Create User

Figure 4C – Create Account process – User ID not available

If all the information entered passes validation criteria, the system displays a message indicating successful *account creation* as shown in figure 4D below.

TRAC CONNECT

User Name: Password: [Create New Account...](#) [Forgot password...](#)
 Remember me next time.
Log In

Home FAQ Locations Contacts Documents

Account Created

Your account has been successfully created.
When you receive your confirmation e-mail,
please click on the link provided to complete your registration.

Continue

Figure 4D – Create Account Process – Account Created Successfully

The user will now receive an email message for them to confirm their account request by clicking on secure link contained in the message.

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The email that contains the link to confirm/authenticate the user ID request will be similar to the display as seen in figure 4E.

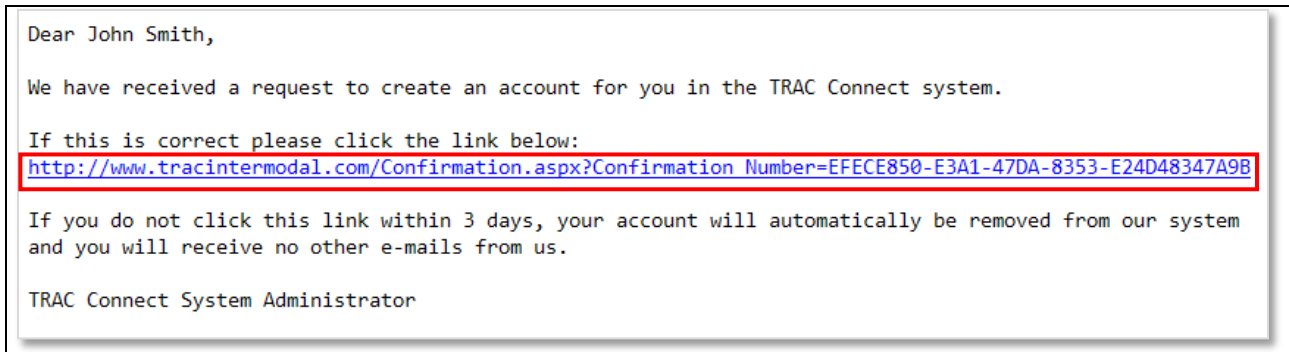


Figure 4E – Create Account Process - Email requesting confirmation

Clicking on the highlighted text will cause the system to display a *confirmation message that account has been confirmed* (figure 4F).

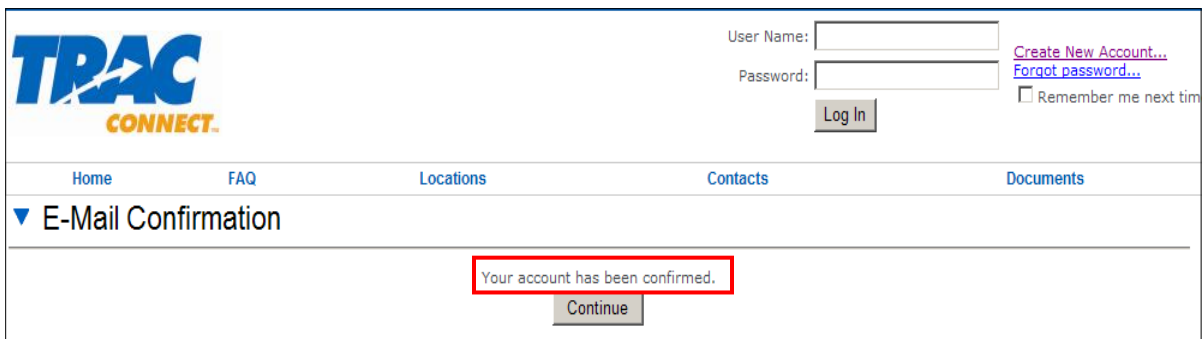


Figure 4F – Create Account Process - Account Setup confirmation

3.3 Login

To log in, enter your user ID and password, and press *Log In*. User ID and password are *not case sensitive*. If you don't want to be required to enter your username on future visits, check the *Remember Me Next Time* box.

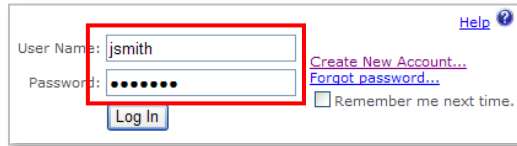


Figure 5 – Login

3.4 Logout

To logout, click on the logout link as shown in figure 8 A.



Figure 6 - Logout

3.5 Session Termination

If you are signed on to your TRAC Connect account, and the session remains idle beyond a configurable amount of time (initially planned for 20 minutes), the system will log you out automatically. You will be required to login again *and any unsaved work will be lost*. Figure 7 shows the screen that is displayed when your session is terminated.

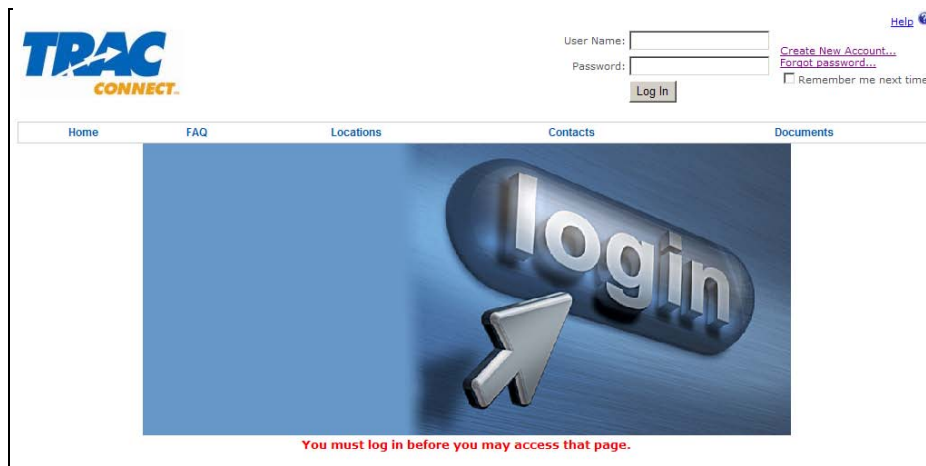


Figure 7 – Session Terminated

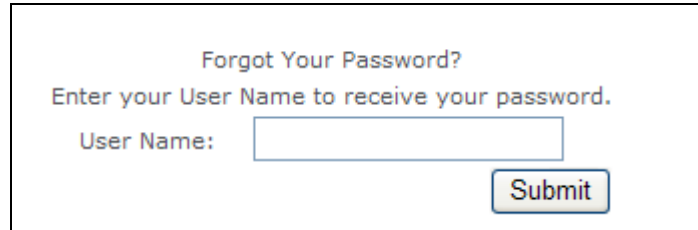
3.6 Forgot Password

If you forget your password, click the *Forgot password...* link on the main Log In screen.



Figure 8A – Forgot Password

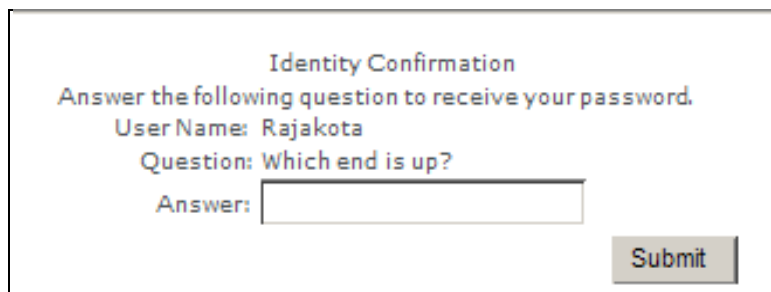
The system will present you with screen shown in figure 8B:



Forgot Your Password?
Enter your User Name to receive your password.
User Name:

Figure 8B – Forgot Password step 1

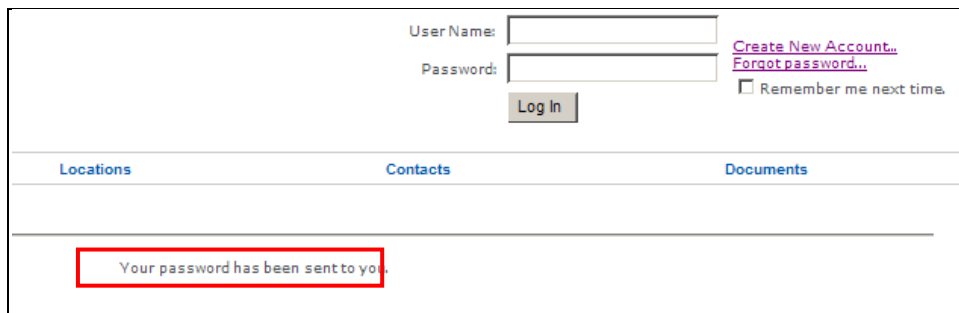
Enter your user name and click *Submit* and if the system recognizes the user id you entered as a valid id, you will be asked to answer the security question as shown in figure 8C



Identity Confirmation
Answer the following question to receive your password.
User Name: Rajakota
Question: Which end is up?
Answer:

Figure 8C – Forgot Password Step 2

After you answer the question and click on submit, your answer will be validated against the answer in the system. If the answer entered does not match the answer in the system, an error message as displayed in figure 8F will be displayed. If the answer matches the answer in the system, a message confirming that the password has been sent by email will be displayed as show in figure 8D. Figure 8E shows the email that contains the user ID and the reset password.



User Name:
Password:
 [Create New Account..](#)
[Forgot password..](#) Remember me next time.
[Locations](#) [Contacts](#) [Documents](#)

Your password has been sent to you.

Figure 8D – Password Reset Confirmation

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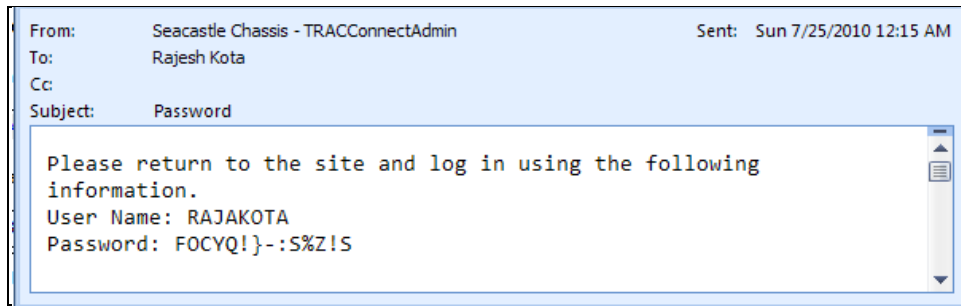


Figure 8E – Copy of reset password in email.

Identity Confirmation
Answer the following question to receive your password.
User Name: rajakota
Question: Which end is up?
Answer:
Your answer could not be verified. Please try again.
Submit

Figure 8F – Forgot password step failed validation

3.7 Change Password

If you would like to change your password you have to log on and click on the *My Account* link. Clicking on this link will result in the display of the *Your Account* screen as displayed in figure 9.

▼ Your Account

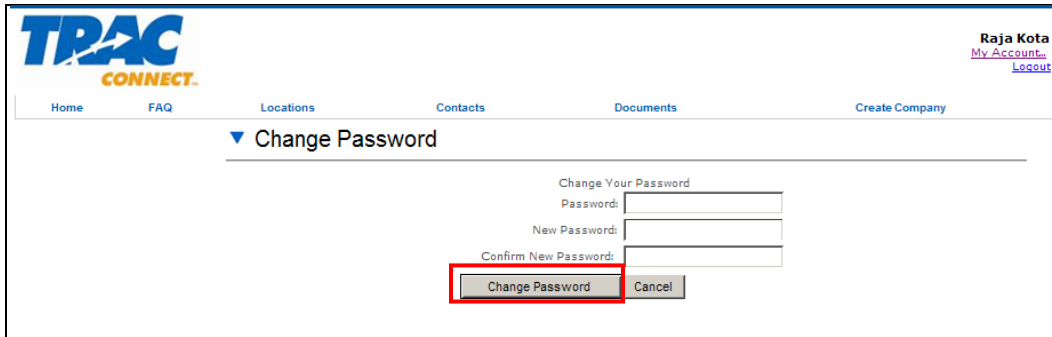
Manage Your Account

First Name:
Last Name:
Title:
User ID:
Password:
E-mail:
Phone Number:
Fax Number:
Security Question:
Security Answer:

Figure 9A – Password Reset – Main Screen

Clicking on the Change Password button will cause the system to display a screen as displayed in figure 9B.

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The screenshot displays the TRAC Connect user interface. At the top left is the TRAC CONNECT logo. On the top right, the user's name 'Raja Kota' is shown, along with links for 'My Account' and 'Logout'. A navigation menu includes 'Home', 'FAQ', 'Locations', 'Contacts', 'Documents', and 'Create Company'. The main content area is titled 'Change Password' with a dropdown arrow. Below this title, the form is titled 'Change Your Password' and contains three input fields: 'Password:', 'New Password:', and 'Confirm New Password:'. At the bottom of the form are two buttons: 'Change Password' (highlighted with a red box) and 'Cancel'.

Figure 9B – Password Reset - Enter details

After you enter your current password, populate the new password and confirm new password fields and click on the *change password* button, your new password will be saved.

4 Create Company

After you have successfully setup your account, you need to create your company's profile. Clicking on create company will cause the system to display the screen with the Details tab selected as shown in figure 10. Successful creation of a company profile requires data entry across different fields in various tabs.

4.1 Company Details tab

Figure 10 –Company Details screen

4.2 Details tab

Use the details tab to enter details for your company, such as the company name. Figure 11 shows the necessary and optional fields that need to be entered in the details tab. Be sure to complete all fields marked with an asterisk. After you enter company details, click on the address tab to enter address details.

Figure 11 – Contact Details tab

4.3 Address tab

Click on the address tab to supply address information. Your company can have up to three different kinds of addresses (e.g. Billing, Physical , Mailing).

4.3.1 Add Address

Click on the Add button on the address tad show in figure 12A, to enter details for each address type as required.



Figure 12A – Addresses Tab

Enter details for the different kinds of available addresses as necessary and press save after update. Every company profile is required to have a physical and billing address. After you are done entering address details click on the contacts tab to enter contact information.

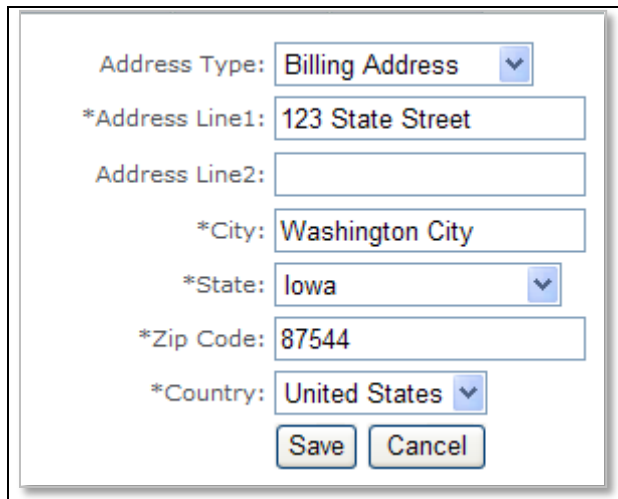


Figure 12B – Address Details - Billing

4.3.2 Delete Address


You can delete an address associated to your company profile by clicking on the delete icon () next to the address. Figure 12C shows a company profile which has an address that can be deleted. The system will prompt for confirmation before it deletes the address.



Figure 12C – Delete Address

4.4 Contacts tab

Click on the contacts tab to enter contact primary and secondary contact details such as Phone, Fax number and email address. Figure 13 shows the screen where you can input contact details. After you are done entering contact details, click on the Credit tab to enter bank and reference details.

Figure 13 – Contact Details

4.5 Credit tab

Click on the credit tab to enter Bank and Reference details. Be sure to supply this information if prompted to.

Figure 14 – Credit Details

4.6 Documents Tab

In order to participate as a valid/authorized user in the TRAC Connect program, you are required to provide copies of documents that establish proof of insurance. See the Rules Directory for details on insurance requirements. Figure 15A shows the documents tab where this information can be entered.

4.6.1 Add Documents

Click on the Browse button to upload a PDF (portable document format) document. Figure 15B displays how to select and upload a document. You are allowed to upload only PDF documents. Update all fields with information corresponding to the loaded document and click on Save. If the information provided does not pass validation criteria, the system will display error(s) as shown in figure 15C.

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Details | Addresses | Contacts | Credit | **Documents** | Agreement | Comments | Messages | Audit Trail

Document Type: Insurance
*File to store: Browse...
Insurance Type:
Insurance Provider:
Insurance Effective Date:
Insurance Expiration Date:
ESignature1 Name:
ESignature1 Attribute:
ESignature2 Name:
ESignature2 Attribute:
Save Cancel

Document Type	Date Created	Approval Status
No Data Found		

Add

Document Comments Details

From	Date	Subject
No Data Found		

Add

No comment selected. Please select a comment from the list to the left.

If you are having difficulty please call 1-877-9-TRACCONNECT

Save Cancel Refresh

Figure 15A – Documents Details

Documents | Agreement | Comments | Messages | Audit Trail

Document Type: Insurance
*File to store: **Browse...**
Insurance Type: Comprehensive Liability
Insurance Provider: Joe's Truck Insurance

Choose file

Look in: Insurance Docs

- Auto Liability.pdf
- Comp Liability.pdf**
- Trailer Interchange.pdf

My Recent Documents
Desktop
My Documents

Figure 15B – Document details – Add/Upload documents


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The screenshot shows the 'Documents' tab in the TRAC Connect user interface. The 'Document Type' is set to 'Insurance'. There are several input fields for insurance details, including 'Insurance Type', 'Insurance Provider', 'Insurance Effective Date', and 'Insurance Expiration Date'. There are also fields for 'ESignature1 Name', 'ESignature1 Attribute', 'ESignature2 Name', and 'ESignature2 Attribute'. A 'Browse...' button is next to the '*File to store:' field. A table below the form shows 'No Data Found' for the document details. A 'Save' button and a 'Cancel' button are at the bottom right. A red error message at the bottom center reads: 'Please select file to store. Please select insurance type. Insurance Provider cannot be blank.' Below the form is a 'Document Comments Details' section with a table showing 'No Data Found' and a message: 'No comment selected. Please select a comment from the list to the left.'

Figure 15C – Document details - Data failed validation

After you are done with the documents, click on the agreement tab to accept the Interchange Agreement.

4.6.2 Delete Documents

You can delete insurance documents associated to your company profile by clicking on the delete icon () next to the document. Figure 15D shows a company profile which has documents that can be deleted. The system will prompt for confirmation before it deletes the document.

The screenshot shows the 'Documents' tab in the TRAC Connect user interface. The 'Document Type' is set to 'Insurance'. There is a table with columns 'Document Type', 'Date Created', and 'Approval Status'. The table contains one row: 'Insurance', '8/1/2010 12:02:43 AM', 'New'. A 'Document inserted Successfully.' message is displayed. There are 'Save', 'Cancel', and 'Refresh' buttons at the bottom. A 'Document Comments Details' section is also visible, showing 'No Data Found' and a message: 'No comment selected. Please select a comment from the list to the left.'

Figure 15D – Delete Document

4.7 Agreement Tab

As part of setting your company profile, you are also required to accept the Interchange Agreement which contains the terms and conditions that you must agree to. Figure 16A displays a section of the interchange agreement and the check box that you need to select in order to agree to the terms and conditions.

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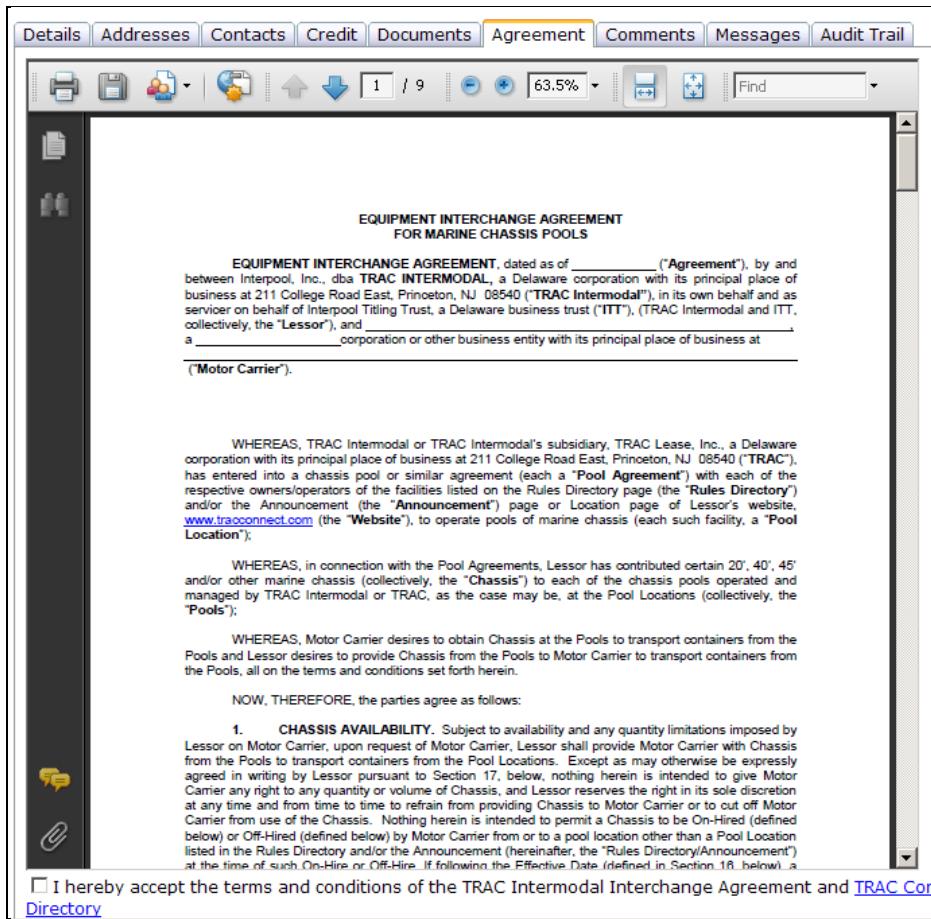


Figure 16A – Agreement details

After you have read and agreed to the terms and conditions of the interchange agreement and also have uploaded the necessary documents, the Received indicator is changed from a red X mark to a green colored check mark . The Status changes from blank to new, indicating that these documents have not been reviewed.

Document	Rcvd Status
TRAC Interchange agreement	<input checked="" type="checkbox"/> New
ITT Interchange agreement	<input checked="" type="checkbox"/> New
Proof of insurance	<input checked="" type="checkbox"/>
Comp Liability	<input checked="" type="checkbox"/> New
Auto Liability	<input checked="" type="checkbox"/> New
Trailer Interchange	<input checked="" type="checkbox"/> New

Figure 16B – Overall Document Status - before internal review

After Documents have been reviewed by TRAC Connect personnel, the status will be updated appropriately. Figure 16C shows a possible scenario of document status after internal review.

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Document	Rcvd	Status
TRAC Interchange agreement	✓	Declined
ITT Interchange agreement	✓	Under Review
Proof of insurance	✓	
Comp Liability	✓	New
Auto Liability	✓	New
Trailer Interchange	✓	Approved

Figure 16C – Overall Document Status - after internal review

As part of maintaining your company profile, you are allowed to add comments for your own review and/or TRAC Connect personnel review.

4.8 Comments tab

4.8.1 Add Comments

You will have the ability to save comments as part of your company profile. These comments can be used for future reference by you or anybody who has access to your company's profile. Figure 17 below displays the screen where you can enter comments. To add more comments, click on the Add button.

▼ Company

Notifications Company Details Contacts Addresses Documents **Comments** Bank Reference Agreements

Subject:

Comment Body:

From	Date	Subject
No Data Found		

Add

Save Cancel

If you are having difficulty please call 999 999 9999

Save Cancel Refresh

Figure 17A – Add Comments

4.8.2 Delete Comments

You can delete comments associated to your company profile by clicking on the delete icon (✖) next to the comment. Figure 17B shows a company profile which has comments that can be deleted. The system will prompt for confirmation before it deletes the comment.

▼ Company

Details Addresses Contacts Credit Documents Agreement **Comments** Messages Audit Trail

From	Date	Subject
✖ RAJAKOTA AM	8/1/2010 12:12:51	Insurance Document Notarized Copy

Comments inserted Successfully.

Add

If you are having difficulty please call 1-877-9-TRACCONNECT

Save Cancel Refresh

Figure 17B – Delete Comments

4.9 Messages tab

Issues and information in regards to your account and/or the TRAC Connect program will be displayed on the *Messages* associated to your company profile. Figure 18 shows the messages tab. Messages can only be created or edited by TRAC Connect personnel. Note that these messages will also be visible on the front page after logging in.



Figure 18 – Messages

4.10 Saving a Company

After you have entered information on each of the screens (pressed save in each tab as required), and press the save button, the system will validate the information. If the data passes all validation steps, there are no error messages. If there are any errors you will need to fix in order for the account to be setup. Figure 19 displays potential error messages when data input does not pass validation criteria.

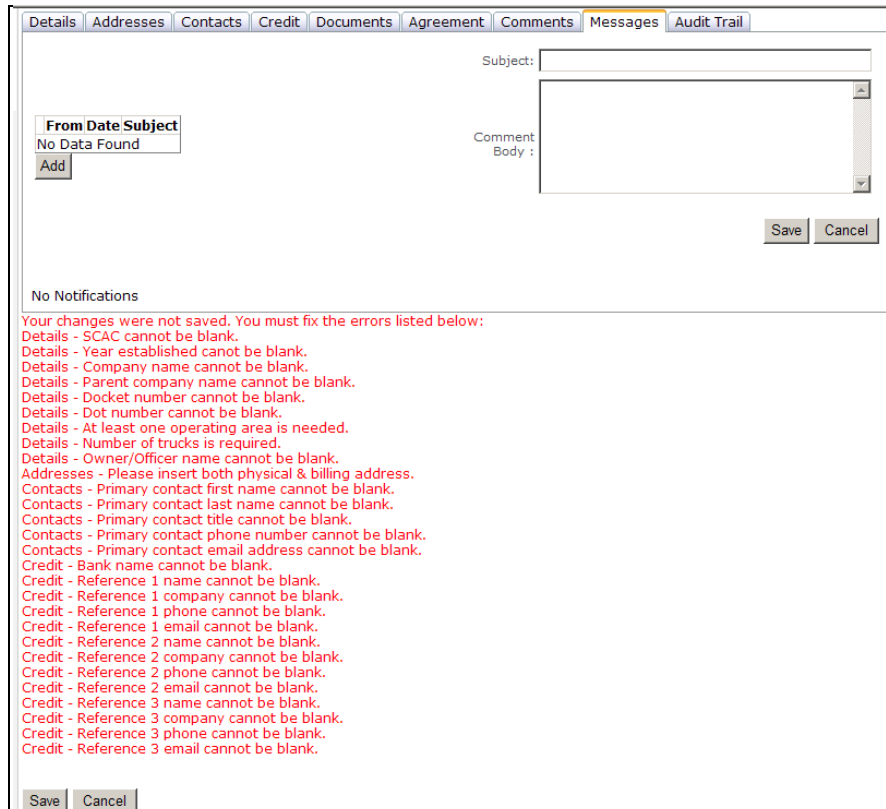


Figure 19 – Company profile setup that failed validation – error messages

4.11 Company Approval

A TRAC Connect representative will review your information. If you are approved, you will receive a confirmation e-mail. If your application is not approved, you will be notified of the reason via e-mail.

5 Editing/Updating a Company

After you have successfully saved your company profile, you can update, edit and delete information as required. In order to perform edits, click on the edit company link as displayed in figure 27.



Figure 20 – Edit Company Profile

In order to Edit or Delete previously entered information, click on the appropriate icons, as displayed in figure 26 below.

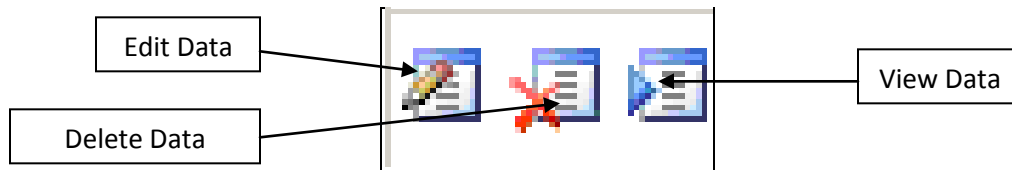


Figure 26 – features to Edit, Delete, Display data

6 FAQ

You can access the FAQ by clicking on the *FAQ* link on the main home page as displayed in figure 21 below

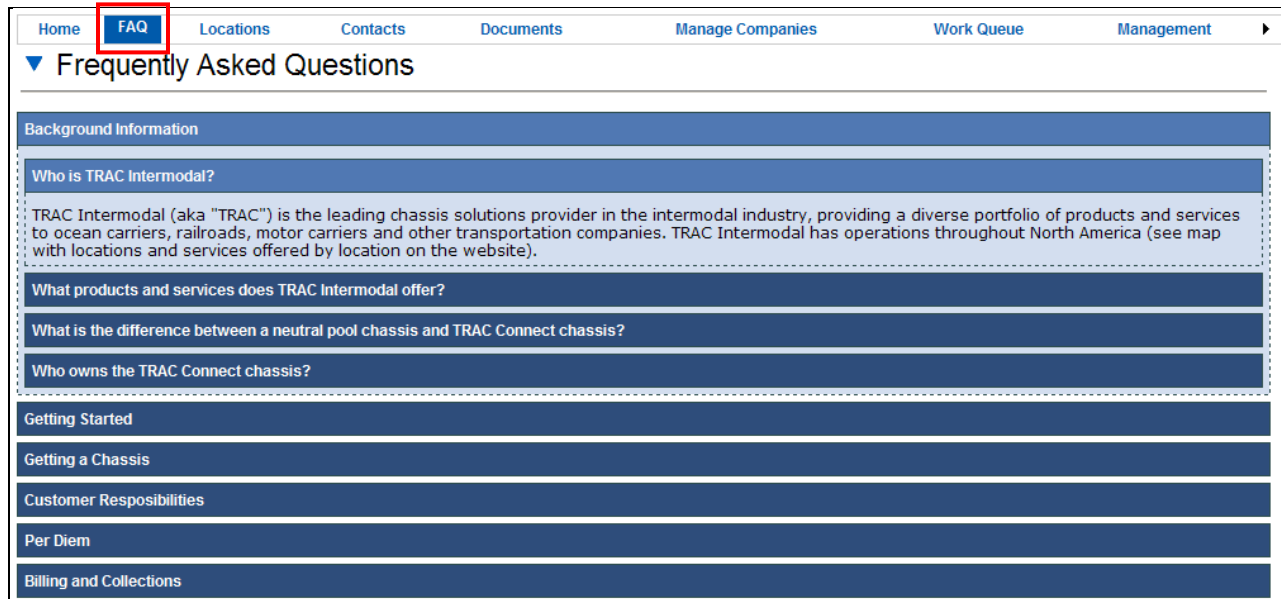


Figure 21 - FAQ

7 Locations

You can access the map of locations where the TRAC Connect program is available by clicking on the *Locations* link on the home page as show in figure 22.

8 Contacts

You can access administrative and operations contact details for the TRAC Connect program by clicking on the *Locations* link on the home page as shown in figure 23.

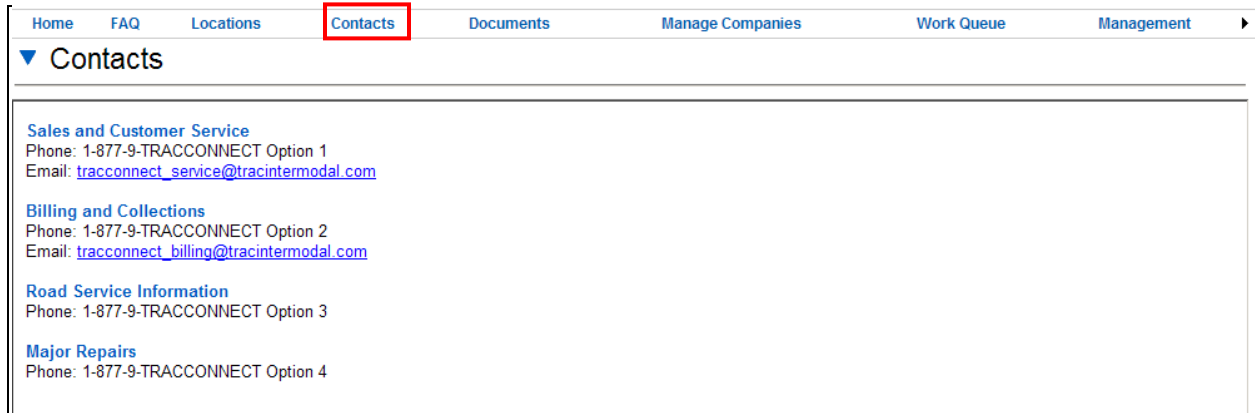


Figure 23 - Contacts

9 Documents

You can access documents that will assist you in Getting Started, Setting up and managing accounts and companies as a user by clicking on the *documents* link as shown in figure 24.

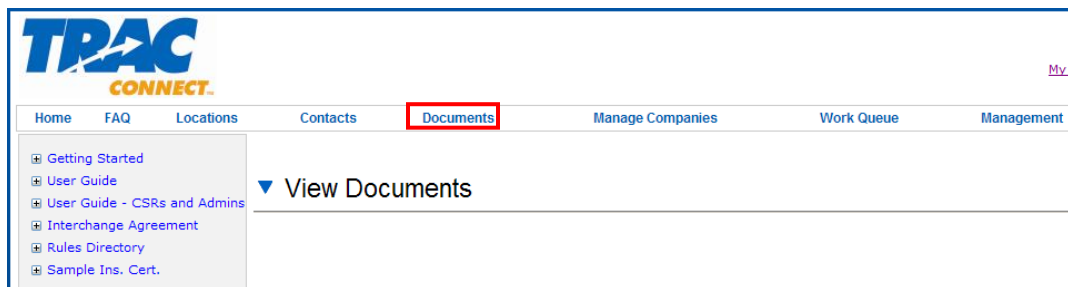


Figure 24 - Documents

Appendix A - Security and Privacy Settings

The following table lists required browser security and privacy settings for both user browsing and site development. In all cases, the recommended settings are the default settings for that browser.

Internet Explorer 6	Make sure that the Internet Zone in the Security Zones settings is set to Medium .
Internet Explorer 7	Make sure that the Internet Zone in the Security Zones settings is set to Medium-High .
FireFox 1.5 or later versions	In the Tools menu under Options , make sure that Enable JavaScript is selected.

Note

If browser security and privacy settings are set too high, JavaScript might be disabled. In that case, the browser cannot run the client-side functionality of an AJAX-enabled ASP.NET application, such as tracconnect.com.