



Getting Started

A Resource Guide for Administrators



Register Your Company



Add Security Groups



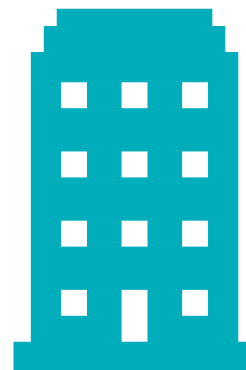
Add and Affiliate Your Users

Version date: June 2021

Getting Started Overview

To get started using the system you will need to:

- [Register your company and yourself as the Administrator](#)
- [Set up Security Groups](#)
- [Add Users](#)
- [Affiliate Users](#)



Before You Get Started

Company Registration

To register your company, you will need your company's contact information and the names of the facilities (Terminals and Ports) your company will be affiliated with.

If you are a motor carrier/trucking company, you will also need your company's:

- SCAC Code
- US DOT Permit No
- Motor Carrier Permit No

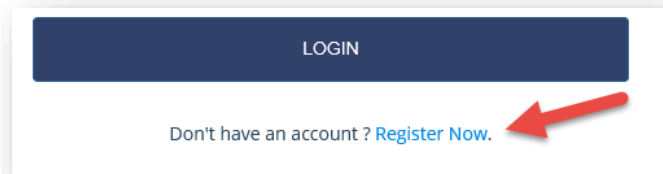
User Registration:

To register your Users, you will need a unique email address for each User.

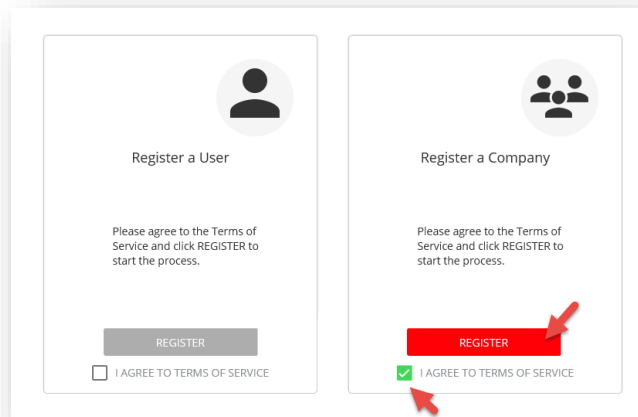


Register Your Company As New User

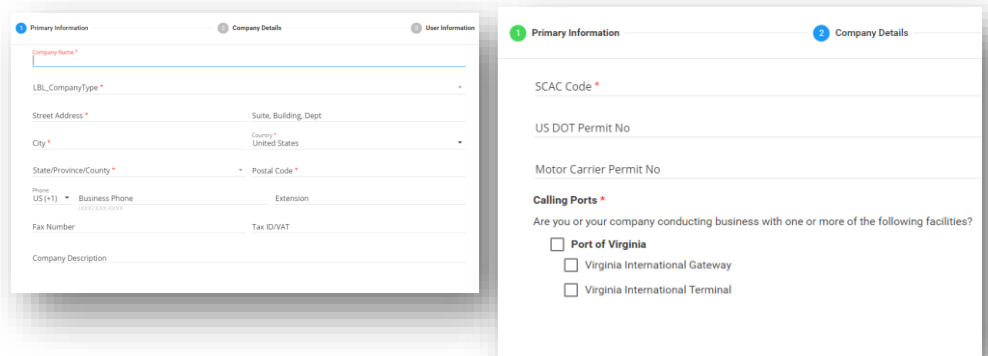
From the Home page, select Register Now



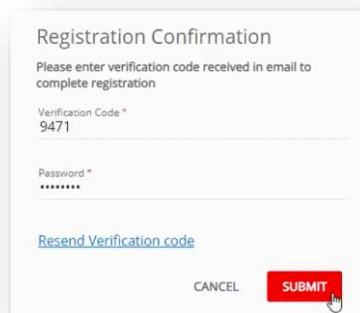
In the Company Registration box, check your agreement to the terms of service (bottom right) and select Register.



Complete the Primary Information Page and Company Details page and select Continue at the bottom right.



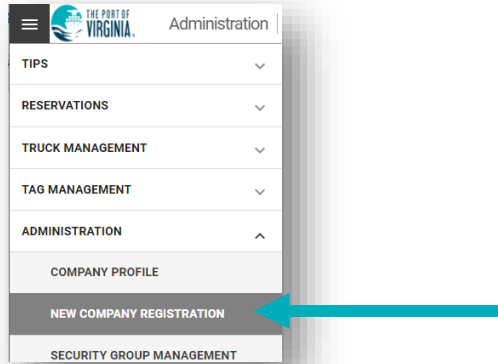
Check your email for your Verification Code and verify your email. (Check your Spam if you do not receive the email.)



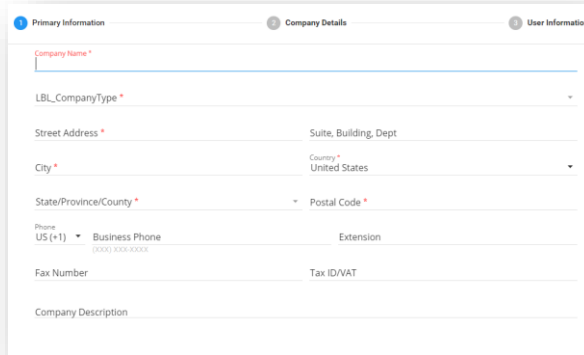
Log back in and register the account

Register Your Company As An Existing User

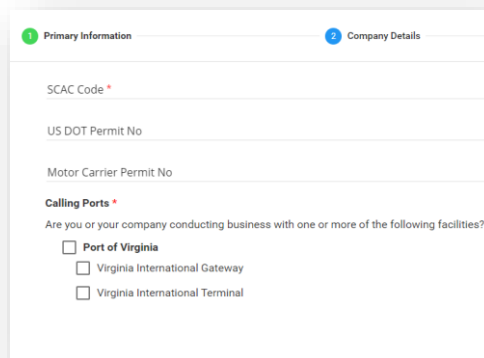
From the hamburger menu at the top left, select New Company Registration



Complete the Company Registration Page and select Continue.



Complete the Company Details Page and select Continue

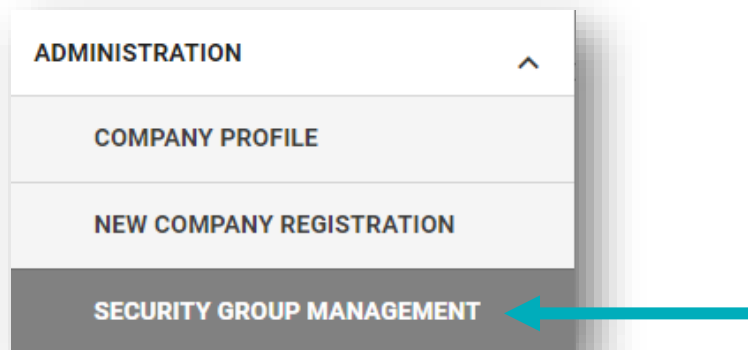


Review the Registration Summary and select Complete Registration.

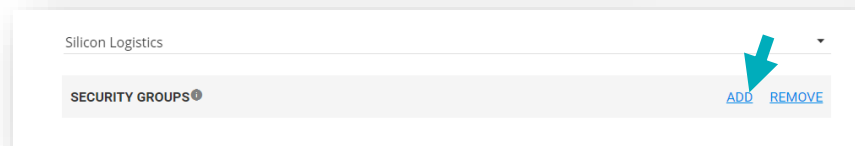
Setup Security Groups

After registering your company, you will need to wait for your company to be approved prior to setting up security groups.

From the hamburger menu at the top left, select Security Group Management

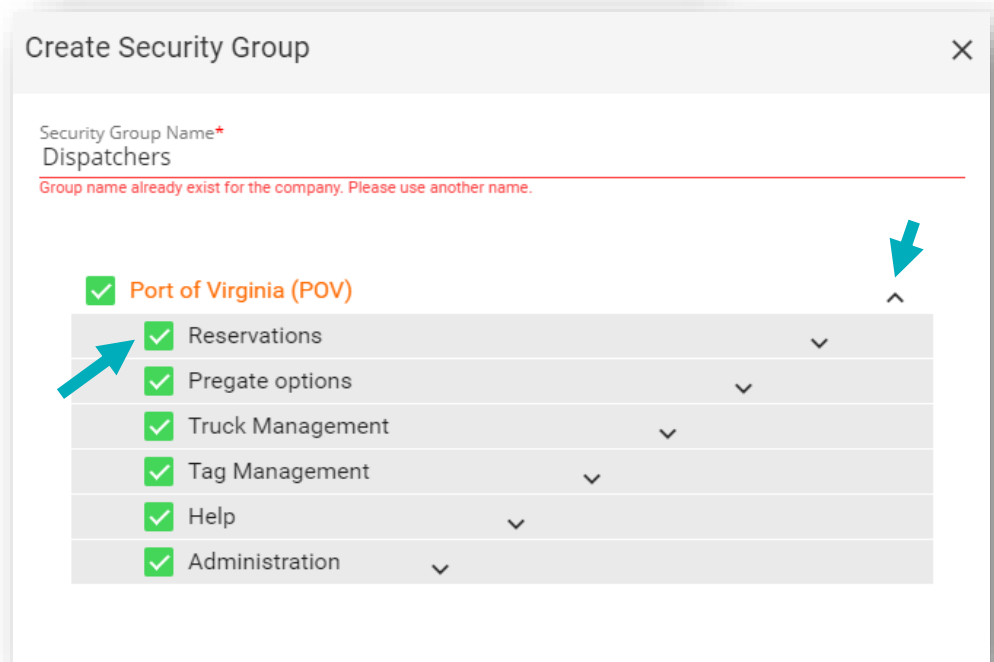
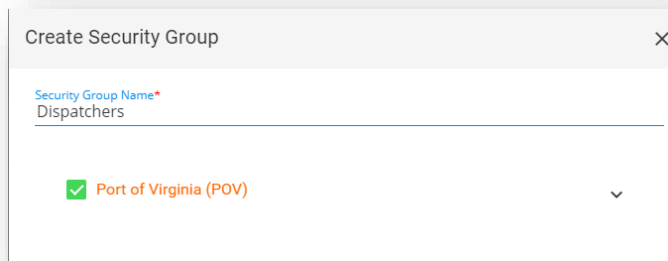


Select Add to the right of Security Groups



Enter the Security Group Name, select the system, use the drop-down arrow to select the screens and functionality the security group will have access to and select Create.

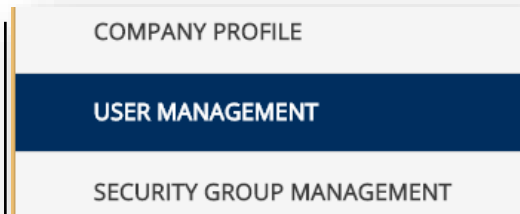
Note: Continue to use the downward arrow open additional layer of security.



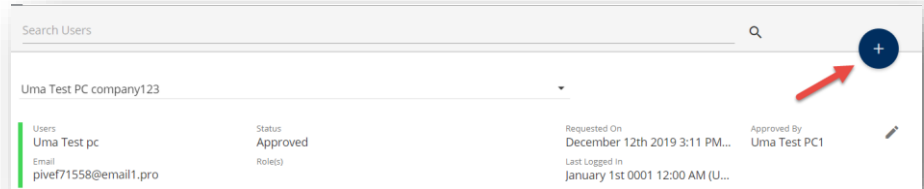
Add Users as an Administrator

Once you have set up your security groups you may add Users as the Administrator. Note: Each user must have a unique email address.

From the left side menu, navigate to the User Management.

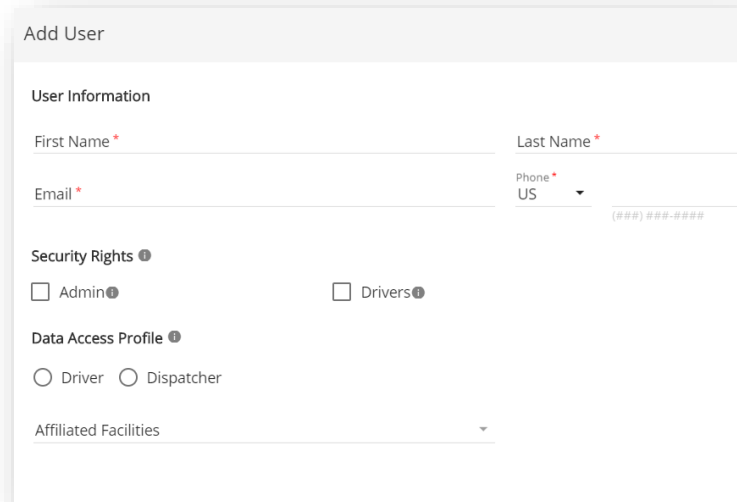


Select the plus sign at the top right.

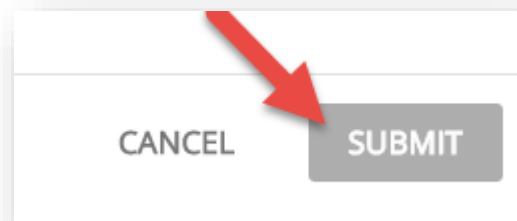


Add the User information including the email address, security group, and data access profile/role.

Note: You may click on the information icon to the right of the security group name to view the details of the security group.

A screenshot of the 'Add User' form. It has sections for 'User Information' with fields for First Name, Last Name, Email, and Phone (with a dropdown for 'US'). Below that is 'Security Rights' with checkboxes for 'Admin' and 'Drivers'. Then 'Data Access Profile' with radio buttons for 'Driver' and 'Dispatcher'. At the bottom is an 'Affiliated Facilities' dropdown menu.

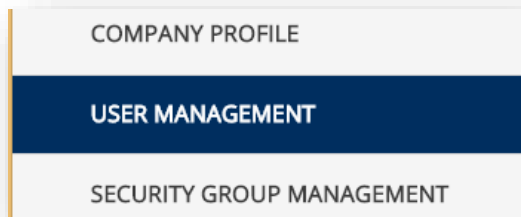
Select Submit at the bottom right.



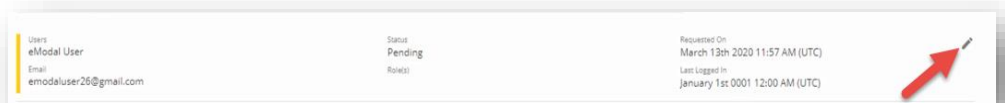
Affiliate Registered Users

Registered users may also request to be affiliated with your company. Affiliation must be approved by the administrator.

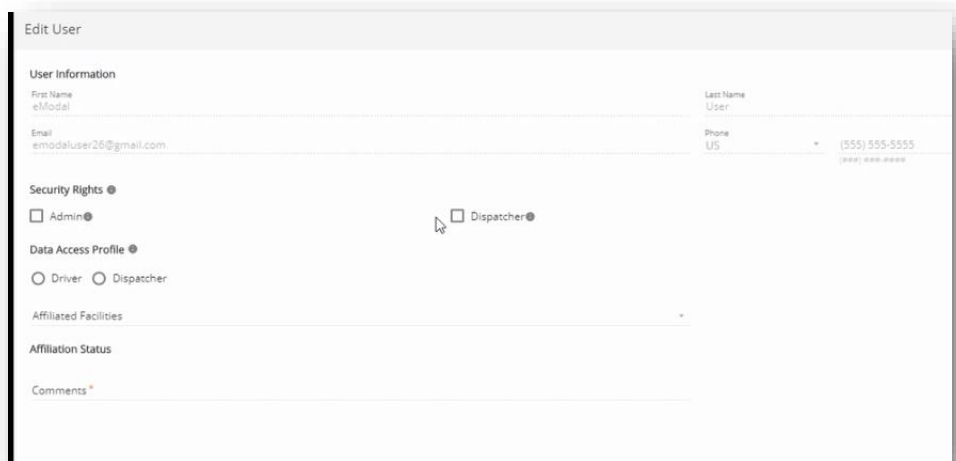
Navigate to the User Management page from the menu at the top left. Users requesting affiliation are displayed in yellow.



Select the edit pen to the right of the user information.



Add the Security Rights and Data Access Profile.



Select Approve at the bottom right

