



JADELOGISTICS

**MASTER TERMINAL
WEB PORTAL USER'S GUIDE**

VERSION 8.5.1.200

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Web Portal User's Guide

The Web Portal is a browser-based interface, which enables you to view and maintain cargo details and view shipping schedules for one or more terminals to which you have access.

As a guest user, you do not need a log in to access the Web Portal but the information that you can see is restricted. Depending on your permissions, you can perform a cargo enquiry or view the shipping schedule.

If you have a log in, and depending on your permissions, you can:

- Search for cargo
- View a shipping schedule
- View or maintain pre-notified cargo items
- View or maintain release requests
- View or maintain cargo update requests
- Generate reports and then send them to specified recipients

The information that you can view and maintain in the Web Portal depends on your role and data access groups, which are set up by the terminal administrator. Your:

- Role and its associated permissions determine what you can do; for example, to view a pre-notified cargo item, you require the *view* permission and to create, edit, or delete a pre-notified cargo item you require the *maintain* permission.
- Data access group determines what you can see; for example, the operator data access group you which you belong determines the cargo and voyages that you can see based on the operator.

Contact the terminal administrator if you cannot see cargo or voyages to which you are entitled. For details about configuring Web Portal users and reports, see [Appendix A](#).

This section covers the following topics.

- [Signing On and Off the Web Portal](#)
 - [Updating Your Password When You Sign On](#)
 - [Resetting Your Password](#)
 - [Signing Off the Web Portal](#)
- [Navigating Around the Web Portal](#)
- [User Options Drop-Down Panel](#)
 - [Maintaining Your Web Portal Settings](#)
 - [Maintaining Your Password](#)
 - [Web Portal Version Details](#)
 - [Web Portal Feedback](#)

- [Using the Web Portal as a Guest User](#)
 - [Web Portal Mobile View](#)
 - [Using the Quick Search](#)
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 - [Searching for Multiple Cargo Items by Identifier](#)
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 - [Duplicating a Cargo Update Request](#)
 - [Deleting a Cargo Update Request](#)
- [Running a Report](#)
- [Specifying E-Mail Recipients](#)

Signing On and Off the Web Portal

Use the user identifier and password that the terminal administrator has set up for you to sign on to the Web Portal.

» To sign on to the Web Portal

1. Select the Web Portal shortcut on the home screen of your device. Alternatively, select the required bookmark in your device browser.

The sign-on screen, shown in the following diagram, is then displayed.



The screenshot shows a sign-on interface for JADE LOGISTICS. At the top is the company logo, consisting of several blue curved lines. Below the logo is the text 'JADE LOGISTICS'. Underneath, there are two input fields: 'User ID' with the value 'DEMO1' and a clear button (X), and 'Password' with masked characters (dots). At the bottom, there are two buttons: 'Back' (grey) and 'Login' (blue). Below the buttons is a link labeled 'Forgot Password'.

2. In the **User ID** text box, enter your user identifier. The user identifier is not case-sensitive and is displayed in uppercase.
3. In the **Password** text box, enter the password associated with your user identifier.

As this is a hidden control for security reasons, each character is represented by a masked character.

If you exceed the permitted number of password attempts so that you are then unable to sign on to the Web Portal, contact the terminal administrator, who will reset your password and enable your access to the system.

If you have forgotten your password, click on the **Forgot Password** link to reset your password. For details, see "[Resetting Your Password](#)".

4. Press the **Login** button. Alternatively, press the **Back** button to return to the guest user home page.

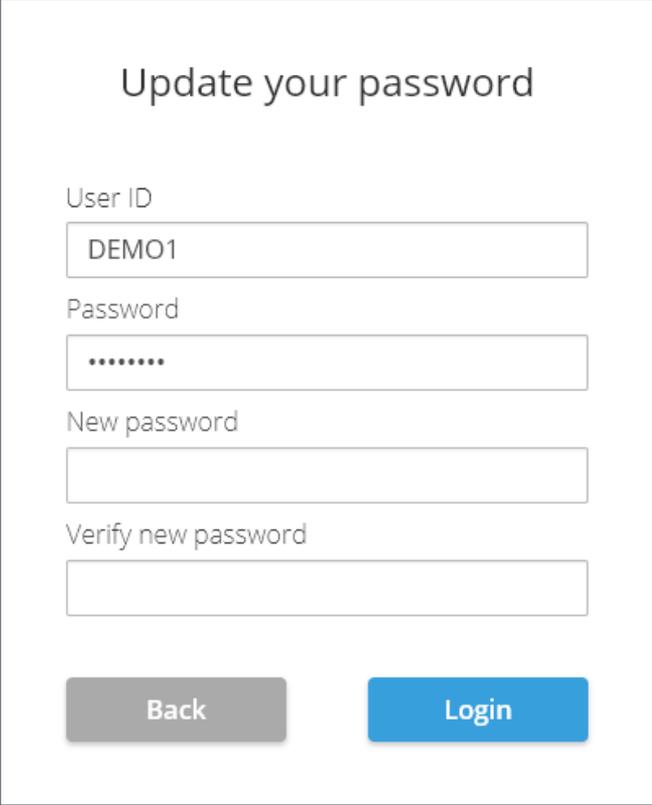
When you enter a valid user identifier and password combination, the Web Portal home page is displayed. Your user identifier is displayed in the User options drop-down panel at the upper right of your browser and a navigator panel is displayed at the left of your browser.

Note If your password has expired, you are prompted to update your password. For details, see "[Updating Your Password When You Sign On](#)".

After a set period of inactivity, you are automatically signed off from the Web Portal.

Updating Your Password When You Sign On

After you sign on to the Web Portal, you could be prompted to update your password if your password has expired or it is the first time that you have signed on to a Master Terminal application.



Update your password

User ID

Password

New password

Verify new password

Your user identifier is displayed in the **User ID** text box and your expired password is displayed in the **Password** text box. The **Password** text box contents are hidden for security reasons.

Note You can manually update your password by using the User options drop-down panel. For details, see "[User Options Drop-Down Panel](#)".

» **If you are prompted to update your password**

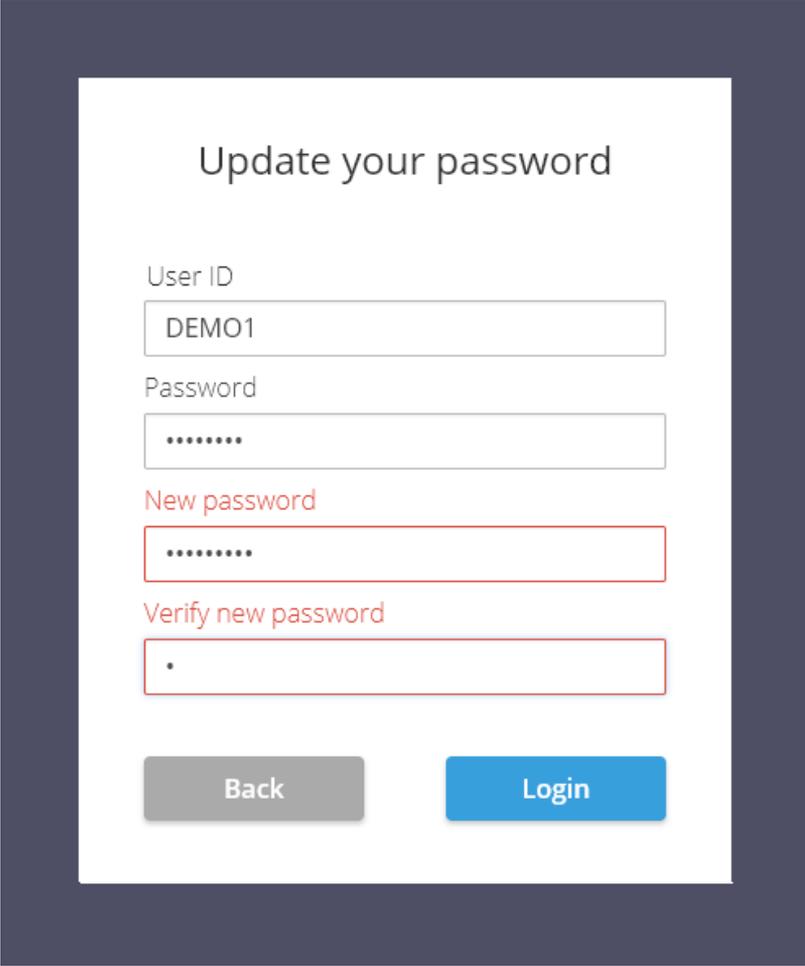
1. In the **New password** text box, enter a new password. The **New password** text box contents are hidden for security reasons.
2. In the **Verify new password** text box, re-enter your new password. The **Verify new password** text box contents are hidden for security reasons.

If both passwords match, the **New password** and **Verify new password** text boxes turn green, as shown in the following diagram.

The screenshot shows a web form titled "Update your password". It has the following elements:

- User ID**: A text input field containing "DEMO1".
- Password**: A text input field with masked characters (dots).
- New password**: A text input field with a green border and masked characters (dots).
- Verify new password**: A text input field with a green border and masked characters (dots).
- Buttons**: A grey "Back" button and a blue "Login" button.

If the passwords do not match, the **New password** and **Verify new password** text boxes turn red, as shown in the following diagram.



The screenshot shows a web form titled "Update your password" with the following fields and buttons:

- User ID:** A text box containing "DEMO1".
- Password:** A text box containing "*****".
- New password:** A text box containing "*****" with a red border, indicating an error.
- Verify new password:** A text box containing "." with a red border, indicating an error.
- Buttons:** A grey "Back" button and a blue "Login" button.

3. Press the **Login** button.

Your password is updated and the Web Portal home page is then displayed.

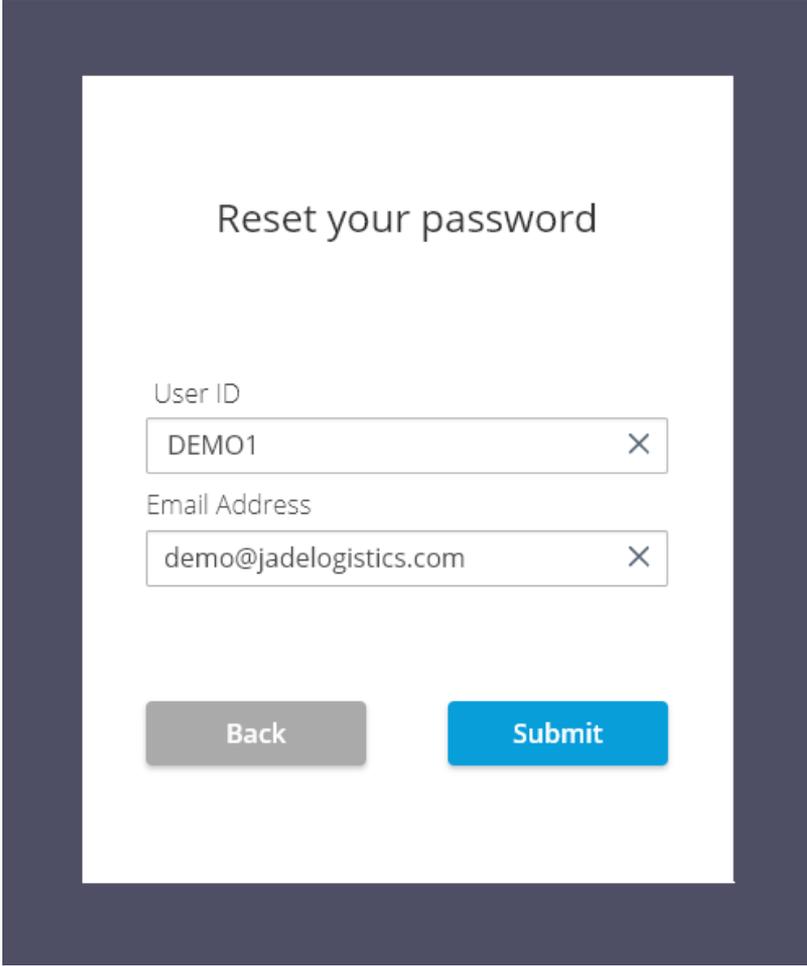
Resetting Your Password

If you forget your password to the Web Portal, you can reset it, if required.

» To reset your password

1. Click on the **Forgot Password** link on the sign-on screen.

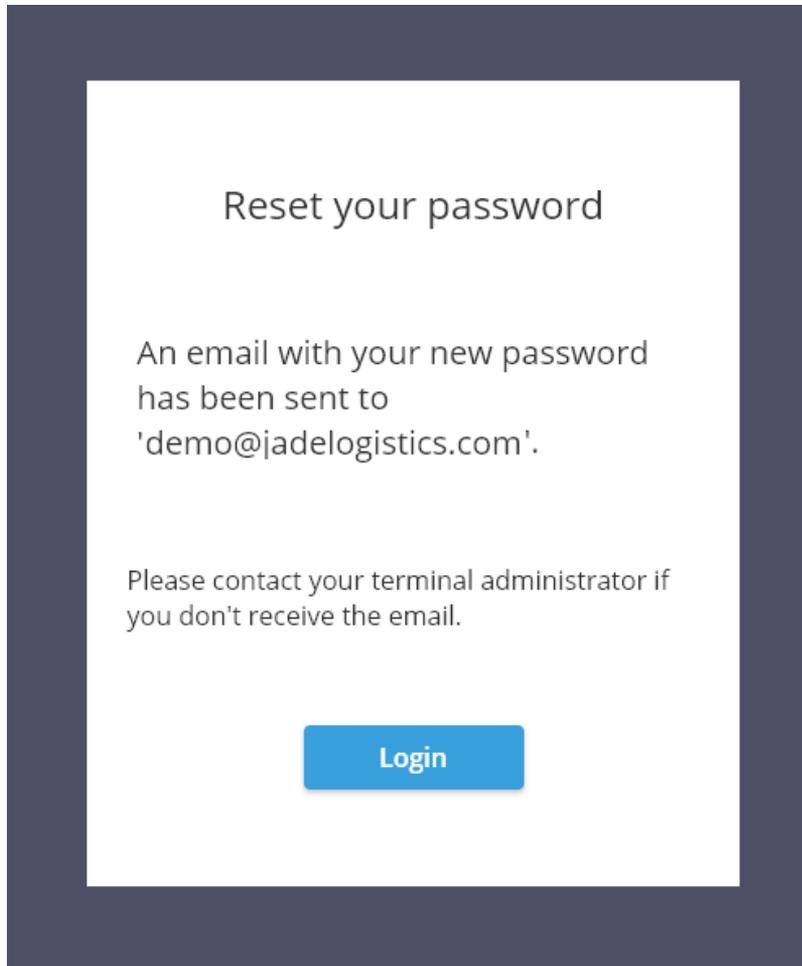
The Reset your password screen, shown in the following diagram, is then displayed.



The screenshot shows a web form titled "Reset your password" centered on a white background, which is itself set within a dark blue rectangular frame. The form contains two text input fields. The first field is labeled "User ID" and contains the text "DEMO1". The second field is labeled "Email Address" and contains the text "demo@jadelogistics.com". Below the input fields are two buttons: a grey "Back" button on the left and a blue "Submit" button on the right. Each input field has a small 'X' icon in its top right corner, likely for clearing the field.

2. In the **User ID** text box, enter your user identifier.
3. In the **Email Address** text box, enter the e-mail address that is associated with your user identifier.
4. Press the **Submit** button. Alternatively, press the **Back** button to return to the sign-on screen.

If your user identifier and e-mail address are valid, the Web Portal then sends an e-mail to the specified address, as shown in the following diagram.



Signing Off the Web Portal

You can sign off from the Web Portal at any time.

After a set period of inactivity, you are automatically signed off from the Web Portal and the guest user Web Portal home page is redisplayed.

» To sign off from the Web Portal

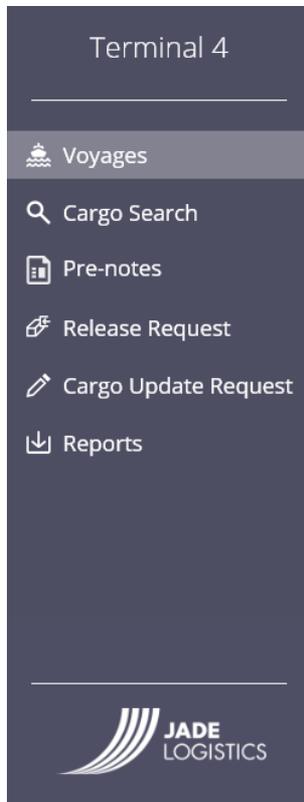
1. Click on your user identifier at the top right of your browser.
2. Select the **Log out** option from the drop-down menu that is displayed.

You are then signed off from the Web Portal and the guest user Web Portal home page is then redisplayed.

Navigating Around the Web Portal

After you sign into the Web Portal, a navigator panel is displayed at the left of your screen. The items that are available in the navigator panel depend on your role.

The following diagram shows an example of the navigator panel for a user whose role enables full access after signing on to the Web Portal.



The terminal that you are currently viewing is displayed at the top of your navigator panel. Your User options drop-down panel enables you to select a different terminal if required. For details, see "[Maintaining Your Web Portal Settings](#)".

Select an item in your navigator panel to view the respective page in the area at the right of the panel. The page that you are currently viewing is highlighted with a lighter background in your navigator panel.

Select the:

- **Voyages** item, to view voyages that are currently in or scheduled to visit the terminal
- **Cargo Search** item, to search for cargo
- **Pre-notes** item, to view or maintain pre-notified cargo
- **Release Request** item, to view or maintain release requests
- **Cargo Update Request** item, to view or maintain cargo update requests
- **Reports** item, to run reports from the Web Portal

Using the Web Portal as a Guest User

When you first open the Web Portal and before you sign in, you are a guest user. Depending on the Web Portal configuration as a guest user, you can use the **Quick Search** and you can view the **Shipping schedule** table, as shown in the following diagram.

The screenshot shows the 'Terminal 4' header with a dropdown arrow and a 'Login' button. Below is a 'Quick Search' section with tabs for 'CARGO', 'BOL', and 'BOOKING', and a search input field. The 'Shipping schedule' section includes a 'Filter Schedule' button and a table with columns: Vessel, Voyage, Status, Operator, Arrival, and Depart. The table lists four vessels: Maersk Teal, UT_VCUTOFF2, ANNALAND, and Bright Stream. At the bottom, there is the JADE LOGISTICS logo and a 'Switch to mobile view' link.

Vessel	Voyage	Status	Operator	Arrival	Depart
Maersk Teal	MT	Pending	ANZ	13/06/2018 11:09 a.m.	20/06/2018 11:09 a.m.
UT_VCUTOFF2	VCUT20000	Pending	MSK	13/06/2018 11:21 p.m.	28/06/2018 1:21 p.m.
ANNALAND	ANNA80242	Pending	Z001	23/06/2018 8:00 a.m.	30/06/2018 10:00 a.m.
Bright Stream	BRSM	Pending	FES	30/06/2018 12:00 p.m.	02/07/2018 8:20 a.m.

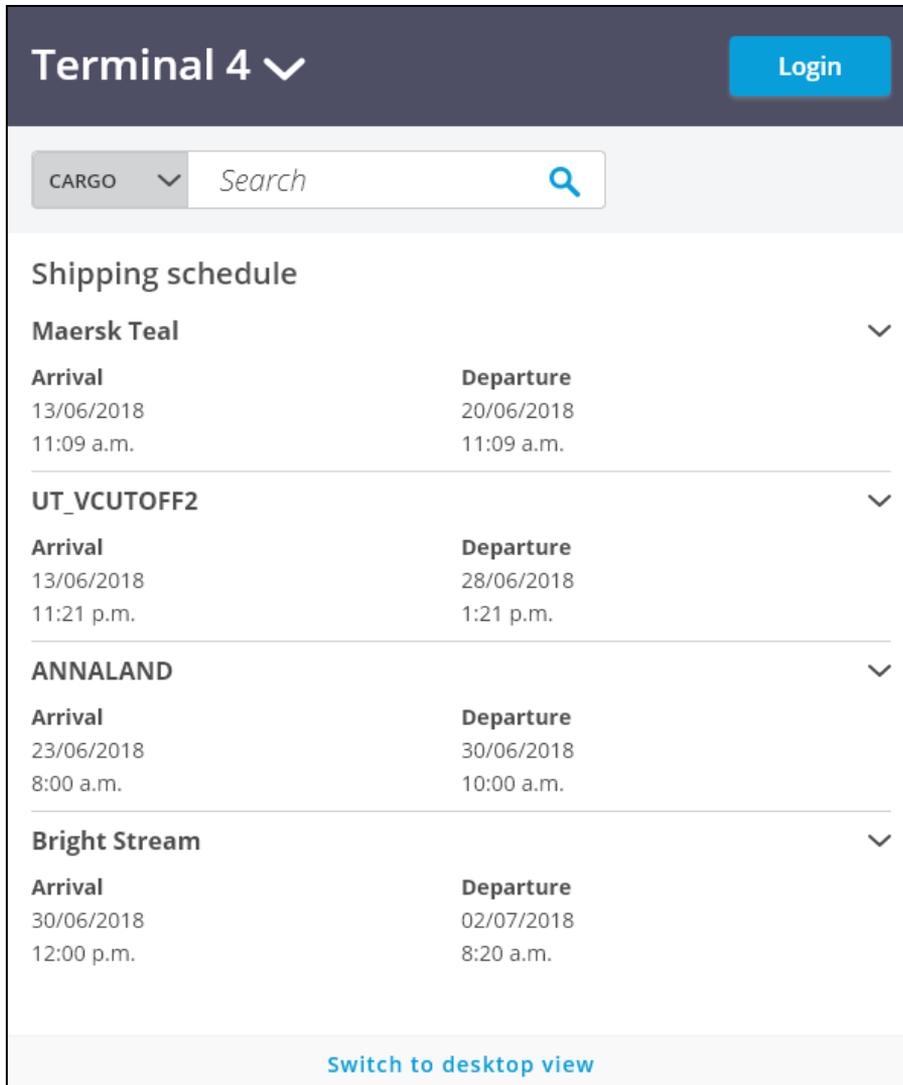
If the Web Portal is set up for a port that has multiple terminals, you can select the terminal whose cargo or shipping schedule you want to view. Click on the drop-down arrow at the right of the terminal name and then select the required terminal.

If you are accessing the Web Portal from a mobile device, click on the **Switch to mobile view** link at the lower left. For details, see "[Web Portal Mobile View](#)".

Web Portal Mobile View

If you are a guest user accessing the Web Portal from a mobile device, click on the **Switch to mobile view** link at the lower left of the guest user Web Portal home page. The mobile view enables you to optimize your view of the Web Portal when you are using it on a mobile device. The Web Portal mobile view is available to guest users only.

An example of the mobile view of the Web Portal is shown in the following diagram.



To return to the desktop view of the Web Portal, click on the **Switch to desktop view** link.

Note When you sign into the Web Portal, you are switched to desktop view automatically. The mobile view option is not available after you sign in.

Using the Quick Search

The **Quick Search** enables you to search for an on-site or pre-notified cargo item in the terminal by using all or some of its identifier. Additionally, if configured, you can search for cargo by a Bill of Lading (BOL) identifier or booking reference. For details, see "[Setting Up Web Portal Guest Users](#)".

The **Quick Search** is available if you have not signed into the Web Portal and only if the terminal has made it available to the guest user.

Note The details that you can view depend on how the guest user is configured.

» To use the Quick Search

1. By default the cargo quick search is selected. Enter some or all of the cargo identifier in the **Search** text box at the right of the **Quick Search** header. Alternatively, if configured, press the:
 - **BOL** button and then enter the BOL identifier of the cargo that you want to find.
 - **BOOKING** button and then enter the booking reference of the cargo that you want to find.

Note The guest user configuration determines whether you can search on a partial cargo identifier or must specify a complete identifier.



2. Press the **Search** button.

On site or pre-notified cargo that matches the specified value is then displayed in the search results table, as shown in the following diagram.

Terminal 4 ▼ Login

Quick Search CARGO BOL BOOKING × 🔍

[Back to shipping schedule](#)

ID	IMEX	Info	Status	Site	
HGNU123789	Export	20'	READY	On Site	➤
HGNU4561232	Export	20'	READY	On Site	➤
HGNU456302	Export	20'	PENDING	Inbound	➤
HGNU7896541	Export	❄️ 40'	PENDING	Inbound	➤
HGNU9876541	Export	20'	STOPS	On Site	➤

[Switch to mobile view](#)

The first 20 items that match the specified identifier are displayed in the search results table. Press the **Load more** button to view more cargo items.

For details about the search result table columns, see "[Search Results Table Details](#)".

Click on the **Back to shipping schedule** link, to return to the guest user Web Portal home page.

3. To view more details about a cargo item that is displayed in the search results table, press the > button at the

right of the table row.

Additional cargo details that you can view are then displayed, as shown in the following diagram.

The screenshot displays the Master Terminal Web Portal interface. At the top, there is a dark blue header with 'Terminal 4' and a dropdown arrow, and a 'Login' button. Below the header is a 'Quick Search' section with tabs for 'CARGO', 'BOL', and 'BOOKING'. A search box contains 'HGNU' and a search icon. Below the search box are links for 'Back to shipping schedule' and 'Back to search'. The main content area shows 'HGNU456302' and 'Export - ISO Container 2001'. To the right, it says 'Prenotified' with a 'PENDING' status. Below this, there are two columns of details: 'General Details' and 'Voyage Details'. The 'General Details' column lists: Booking (-), Alternative ID (-), Cargo Type (ISO Container), ISO Type Code (2001), Commodity (MT - Empty), Weight (66.000 kg), Weight Certifying By (-), Weight Certifying Person (-), Volume (0.0000 m3), Color (-), Consignor (-), Remarks (-), and Parent (-). The 'Voyage Details' column lists: IMEX (Export), Voyage (303), Operator (MSC), Discharge Port (TRG (NZ) Tauranga), Received (-), and Freight Forwarder (-). At the bottom of the page, there is the 'JADE LOGISTICS' logo and a 'Switch to mobile view' link.

You can print the cargo details by using your browser.

4. Click on the **Back to search** link at the upper left to return to the search results table. Click on the **Back to shipping schedule** link, to return to the guest user Web Portal home page.

Viewing the Shipping Schedule

The **Shipping schedule** table, shown in the following diagram, displays vessels that are scheduled to arrive in the next 30 days as well as voyages that departed within the previous 48 hours for the selected terminal.

Vessel	Voyage	Status	Operator	Arrival	Depart	
Maersk Teal	MT	Pending	ANZ	13/06/2018 11:09 a.m.	20/06/2018 11:09 a.m.	▼
UT_VCUTOFF2	VCUT20000	Pending	MSK	13/06/2018 11:21 p.m.	28/06/2018 1:21 p.m.	▼
ANNALAND	ANNA80242	Pending	Z001	23/06/2018 8:00 a.m.	30/06/2018 10:00 a.m.	▼
Bright Stream	BRSM	Pending	FES	30/06/2018 12:00 p.m.	02/07/2018 8:20 a.m.	▼

Use the **Filter Schedule** text box at the upper right of the **Shipping schedule** table, to filter the voyages that are displayed **Shipping schedule** table. As soon as you start to enter a value, the table is filtered based on the entered value. You can search on any value in the table, for example, some or all of a voyage name, status, or departure date.

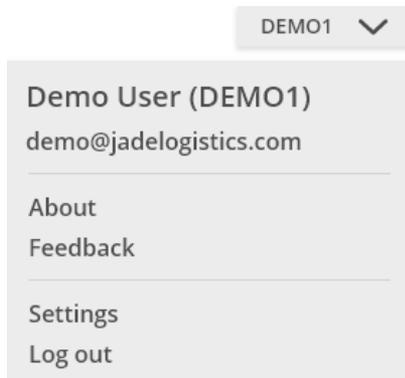
Note To remove the filter, click the **X** at the right of the filter text in the quick filter text box.

To view additional voyage details, click the drop-down arrow at the right of the voyage row. Additional details are then displayed under the voyage row.

User Options Drop-Down Panel

After you sign on to the Web Portal, your user identifier is displayed at the upper left of your browser.

Click on the down arrow (▼) at the right of your user identifier to display the User options drop-down panel, shown in the following diagram.



Your user name, user identifier, and e-mail address are displayed above the horizontal line. These details are read-only.

Click the:

- **About** option, to view Web Portal version details.
- **Feedback** option, to place feedback about the Web Portal.
- **Settings** option, to maintain your e-mail address, locale, and terminal on the **Settings** sheet, and update your password on the **Password** sheet.
- **Log out** option, to sign off the Web Portal. For details, see "[Signing Off the Web Portal](#)".

Maintaining Your Web Portal Settings

The **Settings** sheet on the User options drop-down panel enables you to change your Web Portal settings. An example of the **Settings** sheet is shown in the following diagram.

The screenshot shows a user interface for updating settings. At the top right, there is a user selection dropdown menu showing 'DEMO1'. Below this, there are two tabs: 'Settings' (which is active and underlined) and 'Password'. The 'Settings' section is divided into two columns. The left column contains 'User ID' with the value 'DEMO1' and 'Email Address' with the value 'demo@jadelogistics.com'. The right column contains 'Terminal' with a dropdown menu showing 'T4 - Terminal 4' and 'Locale' with a dropdown menu showing '10249 -'. A blue button labeled 'Update settings' is positioned at the bottom left of the settings area.

» To update your Web Portal settings

1. Select the **Settings** option on the User options drop-down panel.
2. Open the **Settings** sheet, if it is not displayed by default.
3. In the **Email Address** text box, enter the e-mail address that you want to use for Web Portal communications.
4. In the **Terminal** drop-down list, select the terminal whose voyages and cargo you want to view or maintain in the Web Portal (if you have access to more than one terminal).
5. In the **Locale** drop-down list, select the locale that you want to use in the Web Portal. The locale that you select affects the date format and language in your view of the Web Portal.
6. Press the **Update settings** button.

You settings are then updated.

Maintaining Your Password

The **Password** sheet on the User options drop-down panel enables you to change your password. An example of the **Password** sheet is shown in the following diagram.

The screenshot shows a web interface for changing a password. At the top right, there is a user identifier 'DEMO1' with a downward arrow. Below this, there are two tabs: 'Settings' and 'Password', with 'Password' being the active tab. The main content area is titled 'Change Password' and contains three text input fields. The first field is labeled 'Current password' and contains the placeholder text 'Enter current password'. The second field is labeled 'New password' and contains the placeholder text 'Enter new password'. The third field is labeled 'Verify new password' and contains the placeholder text 'Verify new password'. At the bottom left of the form, there is a blue button labeled 'Change Password'.

» To update your password

1. Select the **Settings** option on the User options drop-down panel.
2. Open the **Password** sheet.
3. In the **Current password** text box, enter your current password. The **Current password** text box contents are hidden for security reasons.
4. In the **New password** text box, enter your new password. The **New password** text box contents are hidden for security reasons.
5. In the **Verify new password** text box, re-enter your new password. The **Verify new password** text box contents are hidden for security reasons.

If both passwords match, the **New password** and **Verify new password** text boxes turn green, as shown in the following diagram.

DEMO1 ▾

Settings **Password**

Change Password

Current password

New password

Verify new password

Change Password

If the passwords do not match, the **New password** and **Verify new password** text boxes turn red, as shown in the following diagram.

DEMO1 ▾

Settings **Password**

Change Password

Current password

New password

Verify new password

Change Password

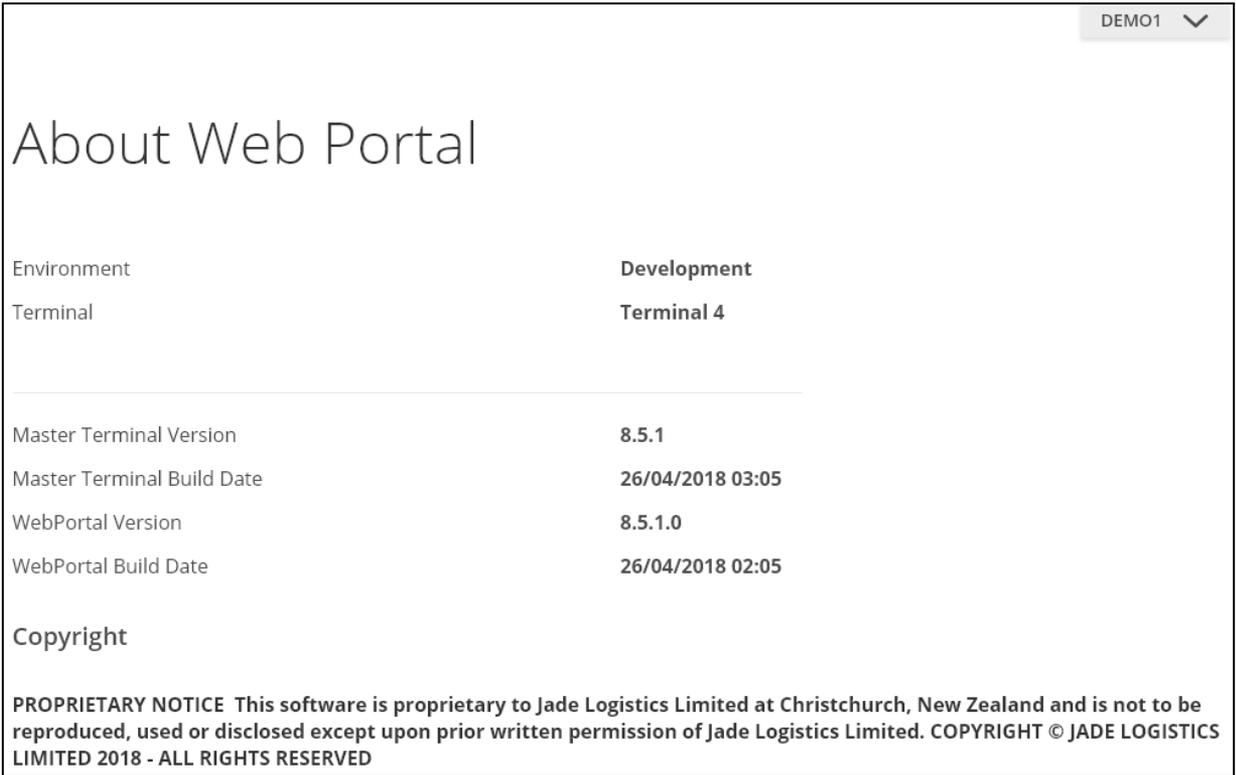
6. Press the **Change Password** button.

If your new password meets the rules set by the terminal, your password is updated and the confirmation message, shown in the following diagram, is displayed.

Change Password
Password changed successfully

Web Portal Version Details

The **About Web Portal** page, shown in the following diagram, displays read-only information about the version of the Web Portal that you are running and a copyright statement.



The screenshot shows the 'About Web Portal' page with a 'DEMO1' dropdown menu in the top right corner. The page content is as follows:

Environment	Development
Terminal	Terminal 4

Master Terminal Version	8.5.1
Master Terminal Build Date	26/04/2018 03:05
WebPortal Version	8.5.1.0
WebPortal Build Date	26/04/2018 02:05

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If you need to contact Master Terminal support regarding the Web Portal, the **About Web Portal** page contains information that could help resolve your query.

» To view Web Portal version details

1. Click on your user identifier at the top right of your browser.
2. Select the **About** option from the drop-down menu that is displayed.

The **About Web Portal** page is then displayed.

Web Portal Feedback

The **Web Portal Feedback** page, shown in the following diagram, enables you to enter feedback about the Web Portal.

DEMO1

Web Portal Feedback

We would love to hear your feedback about the Web Portal application. Please use the form below to tell us about your experience, e.g. usability of the application, feature suggestions, issues etc.

Any cargo related queries should be made directly to your terminal through your standard communication channels.

User ID
DEMO1

Email Address
demo@jadelogistics.com

Feedback
Enter your feedback here

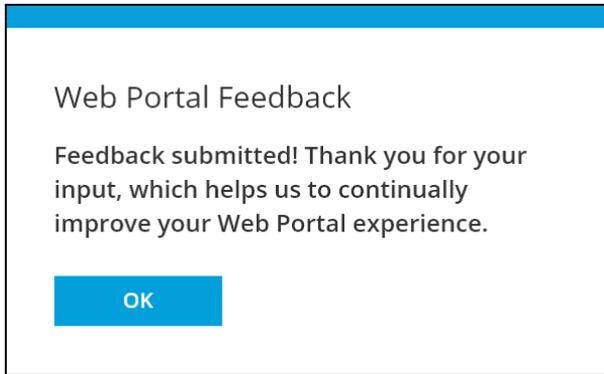
Submit feedback

The feedback that you enter is sent to Master Terminal so that we can improve the Web Portal. If you are having problems using the Web Portal, contact your terminal administrator first because the **Web Portal Feedback** page is not for troubleshooting.

» To enter feedback about the Web Portal

1. Click on your user identifier at the top right of your browser.
2. Select the **Feedback** option from the drop-down menu that is displayed. The **Web Portal Feedback** page is then displayed.
3. Your user name and associated e-mail address are displayed at the top of the page.
4. In the **Feedback** text box, enter your feedback.
5. Press the **Submit feedback** button.

A message, shown in the following diagram, is then displayed to confirm that your feedback has been submitted successfully.



Viewing Voyages

The **Voyages** page enables you to view and search for voyages that are currently in port or scheduled to arrive in the next 30 days as well as voyages that departed within the previous 48 hours for the selected terminal.

» To view the voyages for the selected terminal

1. Click the **Voyages** item in your navigator panel.

The **Voyages** page, shown in the following diagram, is then displayed.

Vessel	Voyage	Update Type	Operator	Arrival	Departure	
ANNALAND	ANNA80242	Pending	Z001	23/05/2018 8:00 a.m.	30/05/2018 10:00 a.m.	▼
Maersk Teal	MT	Pending	ANZ	23/05/2018 11:09 a.m.	30/05/2018 11:09 a.m.	▼
AS AFRICA	AFRIC0003	Pending	ISN	23/05/2018 12:43 p.m.	26/05/2018 9:43 p.m.	▼
Aglaia	AGL	Pending	MES	24/05/2018 9:44 a.m.	26/05/2018 9:44 a.m.	▼
LEXA MAERSK	YUYU123456789	Pending	MSL	24/05/2018 9:53 a.m.	08/06/2018 9:53 a.m.	▼
Maersk Teal	88778	Voyage Arrived	ANZ	25/05/2018 9:04 a.m.	31/05/2018 9:04 a.m.	▼
UT_VCUTOFF2	VCUT20000	Pending	MSK	26/05/2018 11:21 p.m.	28/05/2018 1:21 p.m.	▼

50 voyages are displayed on each page in the **Voyages** table. If more voyages are available to view, press the **Load more** button.

Note If the terminal is configured to use a voyage process other than the **Master Terminal Default**, the **New Voyage Request** button is displayed at the upper right of the page. For details, see "[Creating and Maintaining a Voyage Request](#)".

2. To filter the voyages that are displayed in the **Voyages** table, enter the text on which you want to search in the **Search Voyages** text box and then press the **Search** button. You can search on any value in the table, for example, some or all of a vessel name, a status, or departure date.

Note To remove the filter, click the **X** at the right of the filter text in the **Search Voyages** text box.

3. To view additional voyage details, click on the drop-down arrow at the right of the voyage row. Additional details are displayed under the voyage row.

Click on the drop-down arrow again to hide the additional details.

Creating and Maintaining a Voyage Request

If the terminal is configured to use a voyage process other than the **Master Terminal Default** and depending on your role, you can create a voyage request from the **Voyages** page, shown in the following diagram.

The screenshot shows the 'Voyages' page interface. At the top right, there is a 'DEMO1' dropdown menu. The main heading is 'Voyages'. Below the heading is a search bar with the placeholder text 'Search Voyages', a blue 'Search' button, and a dark grey 'New Voyage Request' button. The main content is a table with the following data:

Vessel	Voyage	Update Type	Operator	Arrival	Departure	
ANNALAND	ANNA80242	Pending	Z001	23/05/2018 8:00 a.m.	30/05/2018 10:00 a.m.	▼
Maersk Teal	MT	Pending	ANZ	23/05/2018 11:09 a.m.	30/05/2018 11:09 a.m.	▼
AS AFRICA	AFRIC0003	Pending	ISN	23/05/2018 12:43 p.m.	26/05/2018 9:43 p.m.	▼
Aglaia	AGL	Pending	MES	24/05/2018 9:44 a.m.	26/05/2018 9:44 a.m.	▼
LEXA MAERSK	YUYU123456789	Pending	MSL	24/05/2018 9:53 a.m.	08/06/2018 9:53 a.m.	▼
Maersk Teal	88778	Voyage Arrived	ANZ	25/05/2018 9:04 a.m.	31/05/2018 9:04 a.m.	▼

» To create a voyage request

1. Press the **New Voyage Request** button at the upper right of the **Voyages** table.

The **New Voyage Request** page, shown in the following diagram, is then displayed.

The screenshot shows the 'New Voyage Request' form with the following fields and values:

- Back to voyages** (link)
- DEMO1** (dropdown)
- Request Details**
- Vessel ***: MT Maersk Teal (dropdown)
- Operator ***: Select Operator (dropdown)
- Has Cargo**
- Voyage Code ***: (empty text box)
- External Voyage Code**: (empty text box)
- Estimate Arrival Date ***: 07/10/2018 (calendar icon)
- Estimate Arrival Time ***: 09:35 AM
- Estimate Departure Date ***: mm/dd/yyyy (calendar icon)
- Estimate Departure Time ***: --:-- --
- Discharge Cargo Operator**: (empty dropdown)
- Load Cargo Operator**: (empty dropdown)
- Visit Type**: (empty dropdown)
- Type of Package**: (empty dropdown)
- Vessel Category**: (empty dropdown)
- Cancel** (button)
- Save** (button)

The fields that you must complete are highlighted with a red asterisk (*).

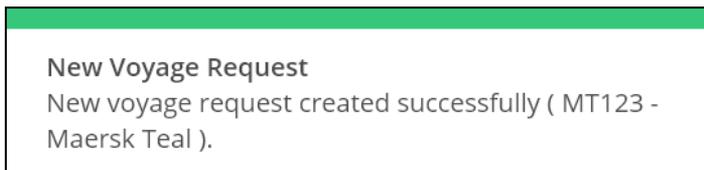
Click on the **< Back to voyages** link to return to the **Voyages** page or click the **Voyages** item in your navigator panel.

2. In the **Vessel** drop-down list, select the vessel associated with the voyage.

Note The vessels that are available are configured in the **Define Process By Terminal** text box on the **Voyage Processes** code table. For details, see "[Voyage Processes Code Table](#)", in your *Master Terminal System Codes Reference*.

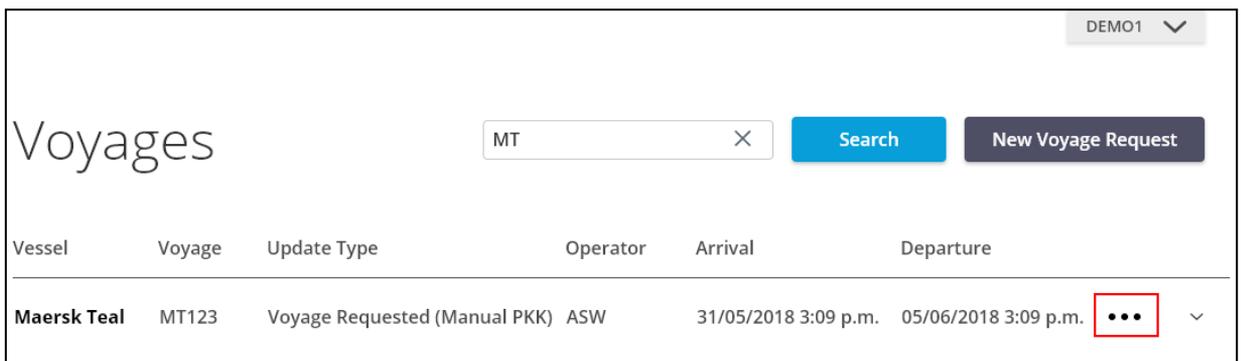
3. In the **Operator** drop-down list, select the operator of the voyage.
4. If the voyage has cargo, check the **Has Cargo** check box.
5. The voyage code is automatically generated and is displayed in the **Voyage Code** text box. Enter the voyage code, if required.
6. In the **External Voyage Code** text box, enter the external voyage code. The code must be unique.
7. In the **Estimated Arrival Date** text box, enter the estimated arrival date of the voyage. By default, the current date is displayed.
8. In the **Estimated Arrival Time** text box, enter the estimated arrival time of the voyage. By default, the current time is displayed.
9. In the **Estimated Departure Date** text box, enter the estimated departure date of the voyage.
10. In the **Estimated Departure Time** text box, enter the estimated departure time of the voyage.
11. Enter the known details in the remaining fields.
12. When you have entered all of the required details, press the **Save** button to save the voyage request. Alternatively, press the **Cancel** button to abandon your entries.

If you pressed the **Save** button, the voyage request is then created and a screen confirms that you created the voyage request successfully, as shown in the following diagram.



The **Voyages** page is redisplayed. The new voyage is displayed in the table and it has the voyage status that is prescribed by your voyage process.

Depending on the voyage status, the voyage could be available to edit. If a voyage is available to edit, the options button is displayed at the right of the voyage row, shown in the following diagram.



Press the options drop-down menu button at the right of the voyage row and then select the **Update** option from the drop-down menu. The screen for the appropriate stage in the voyage process is then displayed. The details that you can edit or maintain depend on the voyage status with regard to the overall voyage process.

Searching for Cargo

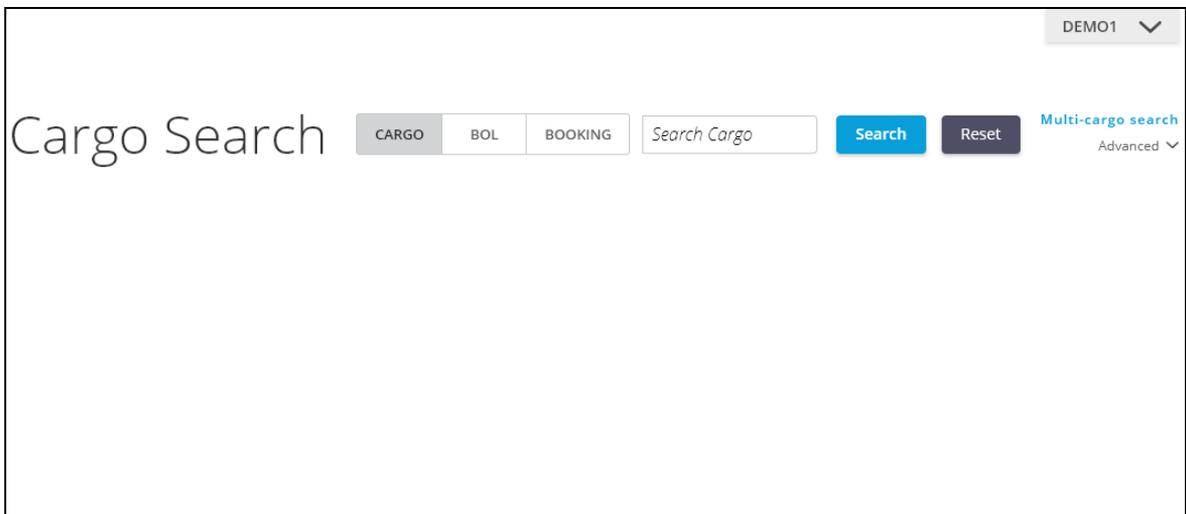
The **Cargo Search** page enables you to search for one or more cargo items by cargo identifier, bill of lading, or booking.

You can perform a filtered simple search, filtered advanced search, or search for multiple cargo identifiers. For details about specifying multiple cargo identifiers on which to search, see "[Searching for Multiple Cargo Items by Identifier](#)".

» To perform a filtered simple or filtered advanced cargo search

1. Click the **Cargo Search** item in your navigator panel.

The **Cargo Search** page, shown in the following diagram, is then displayed.



2. To perform a simple search:
 - a. The **CARGO**, **BOL**, and **BOOKING** filter options enable you to limit your cargo search results as follows. Select the:
 - **CARGO** item, to search for cargo items by their identifier
 - **BOL** item, to search for cargo that is associated with the specified bill-of-lading identifier
 - **BOOKING** item, to search for cargo that is associated with the specified booking reference
 - b. In the search text box, enter the identifier of the item that you selected in the previous step of this instruction. You can enter some or all of the cargo identifier.

Note Leave the search text box empty, to search for all of the cargo items to which you have access.

3. To specify additional search parameters, select the **Advanced** drop-down item and then specify details about the cargo item that you want to find.

The **All**, **Ready**, and **Stops** filter options enable you to limit your cargo search results as follows. Select the:

- **All** filter option, to display all cargo
- **Ready** filter option, to limit your search results to cargo that is available; that is, cargo that has no

outstanding to-do tasks or stops

- **Stops** filter option, to limit your search results to cargo that has stops applied

4. Press the **Search** button.

Alternatively, press the **Reset** button to clear the text boxes and any search results from the table on the All Cargo page.

The following diagram shows an example of the results of a non-filtered search on a partial cargo identifier.

The screenshot shows the 'Cargo Search' interface. At the top right, there is a 'DEMO1' dropdown menu. Below the title, there are filter tabs for 'CARGO', 'BOL', and 'BOOKING'. A search input field contains 'HGNU' with a clear 'X' button. To the right are 'Search' and 'Reset' buttons. Further right, there is a 'Multi-cargo search' link and an 'Advanced' dropdown menu. The main area is a table with the following columns: ID, IMEX, Info, Status, and Site. The table contains seven rows of data, with status indicators like 'READY', 'STOPS', and 'PENDING' in colored buttons. There are also two red warning icons with text: 'CEDO' and 'NO VGM, CEDO'.

ID	IMEX	Info	Status	Site
HGNU123789	Export	20'	READY	On Site
HGNU4561232	Export	20'	READY	On Site
HGNU6541230	Export	❄️ 20'	STOPS	On Site
⊘ CEDO				
HGNU6541233	Export	20'	READY	On Site
HGNU6543211	STORAGE	20'	PENDING	On Site
HGNU9876541	Export	20'	STOPS	On Site
⊘ NO VGM, CEDO				

Note Your data access groups and role determine what you can see and do in the Web Portal.

The first 50 items that match your search criteria are displayed in the search results. Press the **Load more** button to view more cargo items. Alternatively, use the Advanced search parameters to further refine your search.

For details about the search result table columns, see "[Search Results Table Details](#)".

Searching for Multiple Cargo Items by Identifier

» To search for multiple cargo items by identifier

1. Click the **Cargo Search** item in your navigator panel. The **Cargo Search** page is then displayed.
2. Select the **Multi-cargo search** option. The Search multiple cargo at once screen, shown in the following diagram, is then displayed.



3. Enter the complete identifiers of the cargo items that you want to find. You can cut and paste the identifiers into this screen if required.

Separate each identifier with a comma character (,), semi-colon character(;), or line break.

4. Press the **Search** button. Alternatively, press the **Cancel** button to abandon your entries and close the screen.

Cargo items that match the specified identifiers are then listed in table on the **All Cargo** page.

The identifiers that you entered in the Search multiple cargo at once screen are retained until you click on the **Clear list** text or press the **Cancel** button.

Search Results Table Details

The cargo search results table has the following columns.



- ID, which displays the cargo identifier.
- If the cargo item has any stops, the stops icon and stop names are displayed under the cargo identifier.
- IMEX, which displays the IMEX status of the cargo item.
- Info, which displays the cargo item length in feet.



- If the cargo item is a reefer container, the reefer icon is displayed at the left of the length.
- Status, which displays the status of the cargo item.

Icon	Status	Description
	Ready	The cargo item is available; that is, it has no outstanding stops or to-do tasks.
	Stops	The cargo item has stops that must be cleared before it can be received or released. The name of each stop is displayed under the cargo identifier in the search results table.
	Pending	The cargo item is not available because it has outstanding to-do tasks, for example.

- Site, which displays the location of the cargo item as **On Site**, **Off Site**, **On Ship**, or **Inbound**. The **Inbound** location applies to cargo that is:
 - Pre-notified and on ship
 - Pre-notified (rail or road)
 - Arriving as an inter-terminal transfer

Viewing Cargo Details

If the cargo item that you are searching for is displayed in your search results, you can view details about that cargo item. You can view primary and secondary cargo details.

- Primary cargo details are a summary of that cargo item.
- Secondary cargo details display the full record of that cargo item.

Note Your data access groups and role determine what you can see and do in the Web Portal.

» To view cargo details

1. To view primary cargo details, click on the drop-down arrow at the right of the cargo item, as shown in the following diagram.

Cargo Search DEMO1

CARGO BOL BOOKING HGNU X Search Reset Multi-cargo search Advanced

ID	IMEX	Info	Status	Site
HGNU123789	Export	20'	READY	On Site
HGNU4561232	Export	20'	READY	On Site
HGNU6541230	Export	❄️ 20'	STOPS	On Site

⊘ CEDO

Primary information for the cargo item is then displayed, as shown in the following diagram.

Cargo Search DEMO1

CARGO BOL BOOKING HGNU X Search Reset Multi-cargo search Advanced

ID	IMEX	Info	Status	Site
HGNU123789	Export	20'	READY	On Site
HGNU4561232	Export	20'	READY	On Site
HGNU6541230	Export	❄️ 20'	STOPS	On Site

⊘ CEDO

Additional details

Yard location	TQ 0316 2	Booking	-
Cargo Type	ISO Container	Bill of Lading	13493
Operator	MES	ReleaseID	-
Voyage	051E	Amount	-

[View full cargo details](#)

2. Click on the **View full cargo details** link to view the complete cargo details, as shown in the following diagram.

HGNU6541230		STOPS	On Site	Print
Main Details		Status Details		Reefer Details
General Details				
Booking	-	IMEX		
Alternative ID	-	Voyage		
Cargo Type	ISO Container	Operator		
ISO Type Code	2040	Discharge Port		
Commodity	APLA - Chilled Apple	Received		
Weight	2600.000 kg	Freight Forwarder		
Weight Certifying By	-	Export		
Weight Certifying Person	-	051E		
Volume	0.0000 m3	MES		
Color	-	-		
Consignor	-	-		
Remarks	-	01/02/2018 2:24 p.m.		
Parent	-	-		

The **Main Details** and **Status Details** sheets display details about the cargo item and any stops or to-do tasks that are currently applied, respectively. If the cargo item is powered or refrigerated, the **Reefer Details** sheet displays details about the container environment.

3. To print the cargo details of the item that you are currently viewing, press the **Print** button at the upper right. Your browser then formats the page for printing.
4. To return to the search results, click on the **< Back to search results** link at the upper left.

Maintaining Pre-Notified Cargo

Depending on your role, you can view or maintain pre-notified cargo items in the Web Portal.

- [Create pre-notified cargo](#)
- [Search for pre-notified cargo](#)
- [Edit pre-notified cargo](#)
- [Duplicate pre-notified cargo](#)
- [Delete pre-notified cargo](#)

Note Your data access groups and role determine what you can see and do in the Web Portal.

» **To access your Pre-notes home page**

- Click the **Pre-notes** item in your navigator panel.

If you have permission to maintain pre-notified cargo items, the **Pre-notes** page is displayed.

If you have view-only permission for pre-notified cargo items, the **Pre-notes search** page is displayed.

Searching for a Pre-Notified Cargo Item

The **Pre-notes search** page enables you to search for a pre-notified cargo item. You can perform a quick search or an advanced search.

» **To search for pre-notified cargo items**

1. To display the Pre-notes search page:
 - Press the **Pre-notes search** button on the **Pre-notes** page.
 - Select the **Pre-notes** item in your Navigator panel if you have view-only access to pre-notified cargo items.
2. Perform one of the following actions. To perform:
 - A quick search, enter the booking reference of the pre-note in the **Search booking** text box.
 - An advanced search, select the **Advanced** drop-down item and enter details about the pre-notified cargo item that you want to find. (You can enter the last four numbers of the cargo identifier.)

Note To search for all pre-notified cargo items to which you have access, do not enter a value in the search fields.

3. Press the **Search** button. Alternatively, press the **Reset** button to clear the fields and any search results from the **Pre-notes search** page.

Pre-notified cargo items that match your search parameters are then displayed in a table, as shown in the following diagram.

The screenshot shows a web interface for searching pre-notified cargo items. At the top right, there is a 'DEMO1' dropdown menu. On the left, there is a '< Back to Pre-notes' link. The main heading is 'Pre-notes search'. Below the heading is a search input field containing the text 'Search booking', a blue 'Search' button, a dark grey 'Reset' button, and an 'Advanced' dropdown menu. Below the search area is a table with the following columns: Booking, Cargo Type, Info, Cargo ID, Pin, IMEX, Operator, and a three-dot menu icon. The table contains six rows of data.

Booking	Cargo Type	Info	Cargo ID	Pin	IMEX	Operator	
-	ISO Container	20'	ABCD6543210	-	STORAGE	HSL	...
FFS3	ISO Container	20'	CONT789	9012	Export	****	...
FFS3	ISO Container	20'	CONT790	-	Export	****	...
FFS3	ISO Container	20'	CONT791	2586	Export	****	...
AEL0689901	ISO Container	20'	DH DU1477661	2286	Export	BALT	...
AUBNE68143	ISO Container	20'	EEEE112593	3060	Export	SSL	...

The first 20 items that match your search criteria are displayed in the search results. Press the **Load more** button to view more cargo items. Alternatively, use the Advanced search parameters to further refine your search.

Note The <Back to Pre-notes link is not displayed if you have the view-only permission.

Press the options button at the right of a pre-notified cargo item, to display a list of actions that you can perform on that item. The row of the selected item is then highlighted with a gray background and a list of actions that you can perform is listed in the options drop-down menu, as shown in the following diagram.

The screenshot shows a web interface for 'Pre-notes search'. At the top left is a 'Back to Pre-notes' link. A search bar contains 'Search booking' with 'Search' and 'Reset' buttons. An 'Advanced' filter is visible on the right. Below is a table with columns: Booking, Cargo Type, Info, Cargo ID, Pin, IMEX, and Operator. The second row is highlighted in gray, and a dropdown menu is open over it, showing 'View', 'Edit', 'Duplicate', and 'Delete' options.

Booking	Cargo Type	Info	Cargo ID	Pin	IMEX	Operator	
-	ISO Container	20'	ABCD6543210	-	STORAGE	HSL	...
FFS3	ISO Container	20'	CONT789	9012	Export	****	View
FFS3	ISO Container	20'	CONT790	-	Export	****	Edit
FFS3	ISO Container	20'	CONT791	2586	Export	****	Duplicate
AEL0689901	ISO Container	20'	DHDU1477661	2286	Export	BALT	...
AUBNE68143	ISO Container	20'	EEEE112593	3060	Export	SSL	...

Select the action that you want to perform. For details, see the following sections.

- [Editing a Pre-Notified Cargo Item](#)
- [Duplicating a Pre-Notified Cargo Item](#)
- [Deleting a Pre-Notified Cargo Item](#)

To hide the options drop-down menu, press the options drop-down menu button of that pre-notified cargo item again.

Creating a Pre-Notified Cargo Item

The **Pre-notes** home page enables you to create a pre-notified cargo item or to open the **Prenotes search** page from which you can view, edit, duplicate, and delete pre-notified cargo.

Tip If the pre-notified cargo item that you are creating is similar to an existing one, duplicate it and then change required details. For details, see "[Duplicating a Pre-Notified Cargo Item](#)".

Depending on the cargo type of the pre-note that you are creating, the **Pre-notes** page could display the following sections.

- Main Details
- Voyage Details
- Dimensions
- Cargo Details (for example, damage details, hazard details, seal details, photographs, additional details)

The fields that you must complete are highlighted with a red asterisk (*).

Note Your data access groups and role determine what you can see and do in the Web Portal.

» To create a pre-notified cargo item

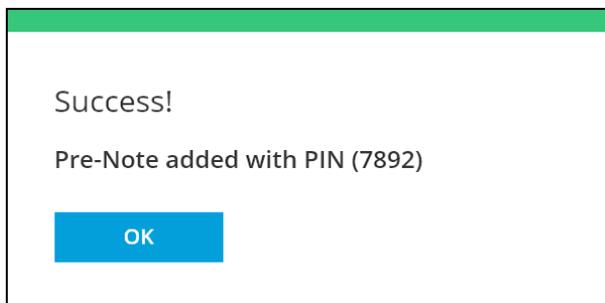
1. Complete the mandatory fields in each section that is displayed on the **Pre-notes** page.

Tip Press the **Reset** button to clear your entries.

To expand or collapse a section:

- Click on the section heading or number
 - Press the **Show** or **Hide** button at the right of each section
2. When you have entered the required details, press the:
 - **Save** button, to save the pre-notified cargo item. The pre-notified cargo item is then saved and the fields on the Pre-notes screen are then cleared.
 - **Save & next** button, to save the pre-notified cargo item but keep the details that you entered so that you can create another record for a similar cargo item. You must enter a different **Cargo ID**.
 - **Reset** button to clear your entries.

If you pressed the **Save** or **Save & next** button, a screen then confirms that you created the pre-notified cargo item successfully. If your terminal is configured to generate a PIN, the PIN is displayed on this screen, as shown in the following diagram.



Editing a Pre-Notified Cargo Item

The **Pre-notes search** page enables you to view, edit, duplicate, and delete pre-notified cargo items.

» To edit a pre-notified cargo item

1. Search for the pre-notified cargo item on the **Pre-notes search** page. For details, see "[Searching for a Pre-Notified Cargo Item](#)".
2. Press the options drop-down menu button at the right of the pre-notified cargo item that you want to edit.
3. Select the **Edit** option. The **Pre-notes** page is then displayed.
4. Enter the required details and then save your entries. For details, see "[Creating a Pre-Notified Cargo Item](#)".

The pre-notified cargo item details are updated and a screen then confirms that you updated the pre-notified cargo item successfully. If your terminal is configured to generate a PIN, the PIN is displayed on this screen. The **Pre-notes search** page is then redisplayed.

Duplicating a Pre-Notified Cargo Item

The **Pre-notes search** page enables you to view, edit, duplicate, and delete pre-notified cargo items.

» To duplicate the details of a pre-notified cargo item

1. Search for the pre-notified cargo item on the **Pre-notes search** page. For details, see "[Searching for a Pre-Notified Cargo Item](#)".
2. Press the options drop-down menu button of the pre-notified cargo item that you want to duplicate.
3. Select the **Duplicate** option.
4. Details from the selected item are then displayed on the **Pre-notes** page.
5. Enter the required details and then save your entries. For details, see "[Creating a Pre-Notified Cargo Item](#)".

The pre-notified cargo item details are updated and a screen then confirms that you created the pre-notified cargo item successfully. If your terminal is configured to generate a PIN, the PIN is displayed on this screen. The **Pre-notes search** page is then redisplayed.

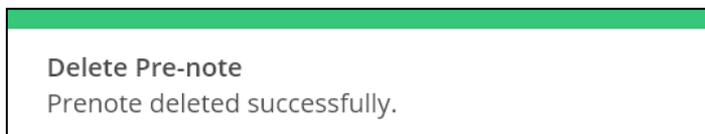
Deleting a Pre-Notified Cargo Item

The **Pre-notes search** page enables you to view, edit, duplicate, and delete pre-notified cargo items.

» To delete a pre-notified cargo item

1. Search for the pre-notified cargo item on the **Pre-notes search** page. For details, see "[Searching for a Pre-Notified Cargo Item](#)".
2. Press the options drop-down menu button at the right of the pre-notified cargo item that you want to delete.
3. Select the **Delete** option. You are then prompted to confirm that you *do* want to delete the pre-notified cargo item.
4. Press the **OK** button. Alternatively, press the **Cancel** button to abandon the deletion.

If you pressed the **OK** button, the pre-notified cargo item is then deleted. A confirmation message is displayed at the top of the screen, as shown in the following diagram.



Maintaining Release Requests

Depending on your role, you can view or maintain release requests in the Web Portal.

- [Create release requests](#)
- [Search for release requests](#)
- [Edit release requests](#)
- [Duplicate release requests](#)
- [Delete release requests](#)

Note Your data access groups and role determine what you can see and do in the Web Portal.

» To access your Release Request home page

- Click the **Release Request** item in your navigator panel.

If you have permission to maintain release requests, the **Release Request** page is displayed.

If you have view-only permission for release requests, the **Release request search** page is displayed.

Searching for a Release Request

The **Release request search** page enables you to search for a release request. You can perform a quick search or an advanced search.

» To search for release requests

1. To display the **Release request search** page:
 - Press the **Past Release Request** button on the **Release Request** page.
 - Select the **Release Request** item in your Navigator panel if you have view-only access to release requests.
2. Perform one of the following actions. To perform:
 - A quick search, enter the release request number in the **Search Release request** text box.
 - An advanced search, select the **Advanced** drop-down item and enter details about the release request that you want to find.

Note To search for all release requests to which you have access, do not enter a value in the search fields.

3. Press the **Search** button. Alternatively, press the **Reset** button to clear the fields and any search results from the **Release request search** page.

Release requests that match your search parameters are then displayed in a table, as shown in the following diagram.

The screenshot shows a web interface for searching release requests. At the top left is a link '< Back to Release request'. The main heading is 'Release request search'. To the right of the heading is a search input field containing 'HG', a 'Search' button, and a 'Reset' button. Further right is an 'Advanced' search toggle. Below the heading is a table with the following data:

Booking	Release Number	Release by Type	Pin	Type	Status	Operator	
HGB2749	HG12345678	Yes	7633	Road	Pending	FES	...
BOOK12345	HG45678932	No	3340	Road	Active	MES	...
HGB2749	HGC12345	Yes		Packing	Active	Z001	...

The first 20 items that match your search criteria are displayed in the search results. Press the **Load more** button to view more release requests. Alternatively, use the Advanced search parameters to further refine your search.

Note The <Back to Release request link is not displayed if you have the view-only permission.

Press the options drop-down menu button at the right of a release request, to display a list of actions that you can perform on that item. The row of the selected item is then highlighted with a gray background and a list of actions that you can perform is listed in the options drop-down menu, as shown in the following diagram.

This screenshot is similar to the previous one, but the first row of the table is highlighted in gray, and an options menu is open for that row. The menu contains the following items: View, Edit, Duplicate, and Delete (in red text).

Booking	Release Number	Release by Type	Pin	Type	Status	Operator	
HGB2749	HG12345678	Yes	7633	Road	Pending	FES	...
BOOK12345	HG45678932	No	3340	Road	Active	MES	...
HGB2749	HGC12345	Yes		Packing	Active	Z001	...

Note The **Edit** and **Duplicate** options are displayed only for **Road** release request types.

Select the action that you want to perform. For details, see the following sections.

- [Editing a Release Request](#)
- [Duplicating a Release Request](#)
- [Deleting a Release Request](#)

To hide the options drop-down menu, press the options drop-down menu button of that release request again.

Creating a Release Request

The **Release Request** page, shown in the following diagram, enables you to create a release request or to open the **Release request search** page from which you can view, edit, duplicate, and delete release requests.

DEMO1

Release Request

Reset Past Release Request

1 Main Details Hide

Release Number * Release by Type

Type * Status * Operator *

Voyage Booking Carrier

Consignee Consignor

Request Date Request Time

Discharge Port Destination Terminal Sub Terminal *

Remarks

2 Reserve Details Show

Save & next Save

Tip If the release request that you are creating is similar to an existing one, duplicate it and then change required details. For details, see "[Duplicating a Release Request](#)".

The **Release Request** page displays the following sections.

- Main Details
- Reserve Details

The fields that you must complete are highlighted with a red asterisk (*).

Note Your data access groups and role determine what you can see and do in the Web Portal.

Complete the mandatory fields in each section that is displayed on the **Release Request** page.

To expand or collapse a section:

- Click on the section heading or number
- Press the **Show** or **Hide** button at the right of each section

» To create a release request

1. Complete the mandatory details in the **Main Details** section.
 - a. In the **Release Number** text box, enter the release number.
 - b. Check the **Release by Type** check box if you are creating a release by type request.
 - c. In the **Type** drop-down list, select the type of release request.
 - d. In the **Status** drop-down list, select the status of the release request.
 - e. In the **Operator** drop-down list, select the operator.
 - f. In the **Voyage** drop-down list, select the voyage.
 - g. In the **Booking** drop-down list, select the booking.
 - h. In the **Carrier** drop-down list, select the carrier.
 - i. In the **Consignee** drop-down list, select the consignee.
 - j. In the **Consignor** drop-down list, select the consignor.
 - k. In the **Request Date** and **Request Time** text boxes, specify the date and time of the request.
 - l. In the **Discharge Port** drop-down list, select the discharge port.
 - m. In the **Destination Terminal** drop-down list, select the destination terminal in your port.
 - n. In the **Remarks** text box, enter any additional remarks.
2. The details that you can enter in the **Reserve Details** section depend on whether you checked the **Release by Type** check box in the **Main Details** section. To add or maintain items in the **Reserve Details** section:
 - a. In the **Cargo Type** drop-down list, select the cargo type.
 - b. For a release by ID, enter the identifier of the cargo item in the **Cargo ID** text box.

- c. For a release by type:
 - i. In the **Cargo Sub Type** drop-down list, select the cargo subtype.
 - ii. In the **Total Requests** text box, enter the number of items required.
- d. Press the **Add** button. Alternatively, press the **Reset** button to clear your entries.

After you press the **Add** button, the item is displayed in the **Reserve By Type Items** table. Press the options drop-down menu button at the right of the table row, to view, edit, or delete an item.

An example of a completed **Reserve Details** section is shown in the following diagram.

DEMO1

Release Request

Reset Past Release Request

1 Main Details Show

2 Reserve Details Hide

Cargo Type * Cargo ID * Total Requested *

Reset Add

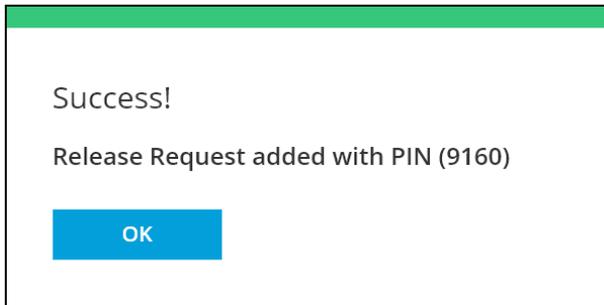
Reserve By Type Items

Cargo Type	Cargo ID	Total Requested	Total Weight	Total Volume
Bag of sand	hgbs4659873	5		

Save & next Save

- 3. When you have entered the required details, press the:
 - ❑ **Save** button, to save the release request. The release request is then saved and the fields on the Pre-notes screen are then cleared.
 - ❑ **Save & next** button, to save the release request but keep the details that you entered so that you can create another request for a similar cargo item. You must enter a different **Cargo ID**.
 - ❑ **Reset** button to clear your entries.

If you pressed the **Save** or **Save & next** button, a screen then confirms that you created the release request successfully. If your terminal is configured to generate a PIN, the PIN is displayed on this screen, as shown in the following diagram.



Editing a Release Request

The **Release request search** page enables you to view, edit, duplicate, and delete release requests.

» To edit a release request

1. Search for the release request on the **Release request search** page. For details, see "[Searching for a Release Request](#)".
2. Press the options drop-down menu button at the right of the release request that you want to edit.
3. Select the **Edit** option. The **Release Request** page is then displayed.
4. Enter the required details and then save your entries. For details, see "[Creating a Release Request](#)".

The release request details are updated and a screen confirms that you updated the release request successfully. The **Release request search** page is then redisplayed.

Duplicating a Release Request

The **Release request search** page enables you to view, edit, duplicate, and delete release requests.

» To duplicate the details of a release request

1. Search for the release request on the **Release request search** page. For details, see "[Searching for a Release Request](#)".
2. Press the options drop-down menu button of the release request that you want to duplicate.
3. Select the **Duplicate** option.
4. Details from the selected request are then displayed on the **Release Request** page.
5. Enter the required details and then save your entries. For details, see "[Creating a Release Request](#)".

The release request details are updated and a screen confirms that you added the release request successfully. The **Release request search** page is then redisplayed.

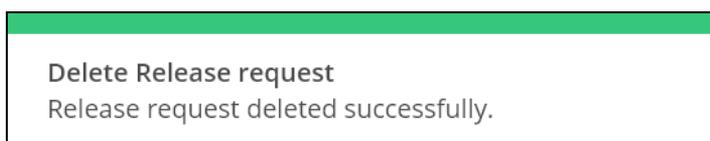
Deleting a Release Request

The **Release request search** page enables you to view, edit, duplicate, and delete release requests.

» To delete a release request

1. Search for the release request on the **Release request search** page. For details, see "[Searching for a Release Request](#)".
2. Press the options drop-down menu button at the right of the release request that you want to delete.
3. Select the **Delete** option. You are then prompted to confirm that you *do* want to delete the release request.
4. Press the **OK** button. Alternatively, press the **Cancel** button to abandon the deletion.

If you pressed the **OK** button, the release request is then deleted. A confirmation message is displayed at the top of the screen, as shown in the following diagram.



Maintaining Cargo Update Requests

Depending on your role, you can view or maintain cargo update requests in the Web Portal.

- [Create cargo update requests](#)
- [Search for cargo update requests](#)
- [Edit cargo update requests](#)
- [Duplicate cargo update requests](#)
- [Delete cargo update requests](#)

Note Your data access groups and role determine what you can see and do in the Web Portal.

» To access your Cargo Update Request home page

- Click the **Cargo Update Request** item in your navigator panel.

If you have permission to maintain cargo update requests, the **Cargo Update Request** page is displayed.

If you have view-only permission for cargo update requests, the **Cargo update request search** page is displayed.

Searching for a Cargo Update Request

The **Cargo update request search** page enables you to search for a cargo update request. You can perform a quick search or an advanced search.

» To search for cargo update requests

1. To display the **Cargo update request search** page:
 - Press the **Search** button on the **Cargo Update Request** page.
 - Select the **Cargo Update Request** item in your Navigator panel if you have view-only access to cargo update requests.

2. Perform one of the following actions. To perform:
 - A quick search, enter the cargo item identifier in the **Search Cargo Id** text box.
 - An advanced search, select the **Advanced** drop-down item and enter details about the cargo update request that you want to find.

Note To search for all cargo update requests to which you have access, do not enter a value in the search text boxes.

3. Press the **Search** button. Alternatively, press the **Reset** button to clear the text boxes and any search results from the **Cargo update request search** page.

Cargo update requests that match your search parameters are then displayed in a table, as shown in the following diagram.

Cargo ID	Cargo Type	Update Type	Update Details	Status	
CSFU1450041	ISO Container	Stops Request	Clear - Damage	Actioned	...
CSFU1450041	ISO Container	To Do Tasks	Add - Requires Inspection	Actioned	...
CSFU1450041	ISO Container	Stops Request	Clear - Damage	Actioned	...
CSFU1450041	ISO Container	To Do Tasks	Clear - Requires Inspection	Actioned	...
CSFU1450041	ISO Container	To Do Tasks	Clear - Requires Inspection	Actioned	...

The first 20 items that match your search criteria are displayed in the search results. Press the **Load more** button to view more cargo update requests. Alternatively, use the Advanced search parameters to further refine your search.

Note The **<Back to Cargo update request** link is not displayed if you have the view-only permission.

Press the options drop-down menu button at the right of a cargo update request, to display a list of actions that you can perform on that item. The row of the selected item is then highlighted with a gray background and a list of actions that you can perform is listed in the options drop-down menu, as shown in the following diagram.

The screenshot shows a web interface for searching cargo update requests. At the top left is a link to "Back to Cargo update request". The main heading is "Cargo update request search". A search input field contains "CSFU1450041" with a clear button (X). To the right are "Search" and "Reset" buttons, and an "Advanced" dropdown menu. Below the search bar is a table with columns: Cargo ID, Cargo Type, Update Type, Update Details, and Status. The first row is highlighted in gray. To the right of this row is a three-dot menu icon. A dropdown menu is open, showing options: View, Edit, Duplicate, and Delete (in red). The other rows in the table are not highlighted.

Cargo ID	Cargo Type	Update Type	Update Details	Status	
CSFU1450041	ISO Container	Stops Request	Clear - Damage	Actioned	•••
CSFU1450041	ISO Container	To Do Tasks	Add - Requires Inspection	Actioned	View
CSFU1450041	ISO Container	Stops Request	Clear - Damage	Actioned	Edit
CSFU1450041	ISO Container	To Do Tasks	Clear - Requires Inspection	Actioned	Duplicate
CSFU1450041	ISO Container	To Do Tasks	Clear - Requires Inspection	Actioned	Delete
CSFU1450041	ISO Container	To Do Tasks	Clear - Requires Inspection	Actioned	•••

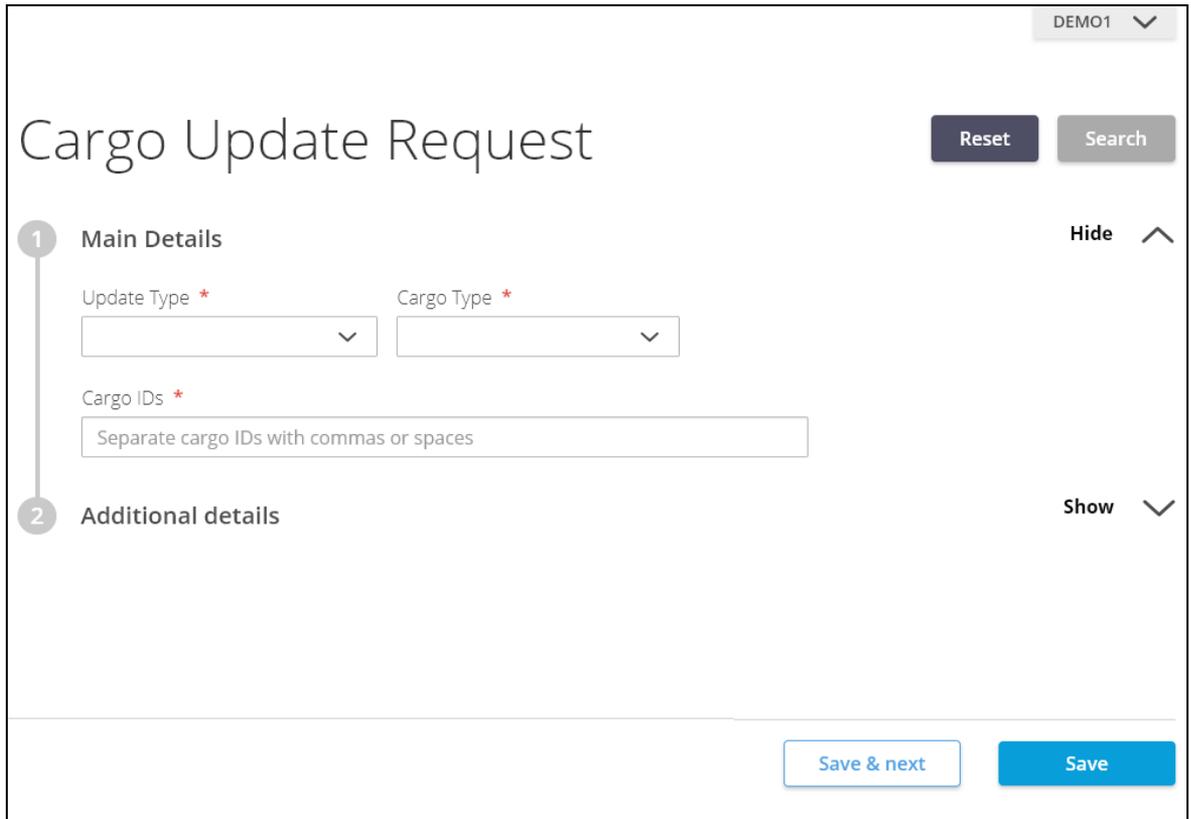
Select the action that you want to perform. For details, see the following sections.

- [Editing a Cargo Update Request](#)
- [Duplicating a Cargo Update Request](#)
- [Deleting a Cargo Update Request](#)

To hide the options drop-down menu, press the options button of that cargo update request again.

Creating a Cargo Update Request

The **Cargo Update Request** page, shown in the following diagram, enables you to create a cargo update request or to open the **Cargo update request search** page from which you can view, edit, duplicate, and delete cargo update requests.



Tip If the cargo update request that you are creating is similar to an existing one, duplicate it and then change required details. For details, see "[Duplicating a Cargo Update Request](#)".

The **Cargo Update Request** page displays the following sections.

- Main Details
- Additional details

The text boxes that you must complete are highlighted with a red asterisk (*).

Note Your data access groups and role determine what you can see and do in the Web Portal.

Complete the mandatory fields in each section that is displayed on the **Cargo Update Request** page.

To expand or collapse a section:

- Click on the section heading or number
- Press the **Show** or **Hide** button at the right of each section

» To create a cargo update request

1. Complete the mandatory details in the **Main Details** section. In the:
 - a. **Update Type** drop-down list, select the cargo information that you want to update. The update type determines what information you must enter.
 - b. **Cargo Type** drop-down list, select the cargo type.
 - c. **Cargo IDs** text box, enter the identifiers of the cargo items to which you want to apply an update request. Separate multiple entries with commas or spaces.
 - d. Fields that are displayed, enter details about the information that you want to update on the cargo item.
2. Complete the **Additional details** section.
 - a. To exclude the update request from being deleted, uncheck the **Auto Cleanup** check box (the update then exists indefinitely). Alternatively, check this check box, to delete the request when Master Terminal performs the automatic clean-up process.
 - b. To notify the selected people by e-mail message when updates are applied to the cargo items, press the **Add recipients** button. The Add/Remove Recipients screen is then displayed. Specify the recipients of the report and then press the **Send** button. For details, see "[Specifying E-mail Recipients](#)".

The recipients are then is displayed in the **Email** table. Press the **Remove** button at the right of an e-mail address, to remove a recipient.
 - c. To specify one or more times when to send the notification e-mail, enter a time in the **Notify Times** text box and then press the **Add notify time** button. By default, the current time is displayed.

After you press the **Add notify time** button, the time is displayed in the **Notify Times** table. Press the **Remove** button at the right of the table row, to remove a notify time.

An example of a completed **Additional details** section is shown in the following diagram.

The screenshot shows a web form titled "Cargo Update Request" with a "DEMO1" dropdown in the top right. Below the title are "Reset" and "Search" buttons. On the left, a sidebar shows "1 Main Details" and "2 Additional details" (selected). To the right of the sidebar are "Show" and "Hide" dropdowns. The "Additional details" section includes a checked "Auto Cleanup" checkbox. Below it are two expandable sections: "Email Recipients" and "Notify Times". The "Email Recipients" section has a text input for "Email addresses of the users to be notified when this request has been actioned", an "Add recipients" button, and a table with one row: "demo@jadelogistics.com" with a "Remove" button. The "Notify Times" section has a text input for "10:15 AM", an "Add notify time" button, and a table with one row: "10:15" with a "Remove" button. At the bottom right are "Save & next" and "Save" buttons.

- When you have entered the required details, press the:
 - Save** button, to save the cargo update request. The cargo update request is then saved and the fields on the **Cargo Update Request** page are then cleared.
 - Save & next** button, to save the cargo update request but keep the details that you entered so that you can create another request for a similar cargo item. You must enter a different **Cargo ID**.
 - Reset** button to clear your entries.

If you pressed the **Save** or **Save & next** button, a screen then confirms that you created the cargo update request successfully.

Cargo Update Request - successful update

Editing a Cargo Update Request

The **Cargo update request search** page enables you to view, edit, duplicate, and delete cargo update requests.

» To edit a cargo update request

1. Search for the cargo update request on the **Cargo update request search** page. For details, see "[Searching for a Cargo Update Request](#)".
2. Press the options drop-down menu button at the right of the cargo update request that you want to edit.
3. Select the **Edit** option. The **Cargo Update Request** page is then displayed.
4. Enter the required details and then save your entries. For details, see "[Creating a Cargo Update Request](#)".

The cargo update request details are updated and a screen confirms that you updated the cargo update request successfully. The **Cargo update request search** page is then redisplayed.

Duplicating a Cargo Update Request

The **Cargo update request search** page enables you to view, edit, duplicate, and delete cargo update requests.

» To duplicate the details of a cargo update request

1. Search for the cargo update request on the **Cargo update request search** page. For details, see "[Searching for a Cargo Update Request](#)".
2. Press the options drop-down menu button of the cargo update request that you want to duplicate.
3. Select the **Duplicate** option.
4. Details from the selected request are then displayed on the **Cargo Update Request** page.
5. Enter the required details and then save your entries. For details, see "[Creating a Cargo Update Request](#)".

The cargo update request details are updated and a screen confirms that you added the cargo update request successfully. The **Cargo update request search** page is then redisplayed.

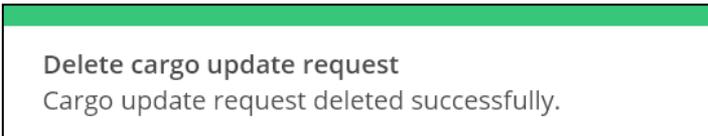
Deleting a Cargo Update Request

The **Cargo update request search** page enables you to view, edit, duplicate, and delete cargo update requests.

» To delete a cargo update request

1. Search for the cargo update request on the **Cargo update request search** page. For details, see "[Searching for a Cargo Update Request](#)".
2. Press the options drop-down menu button at the right of the cargo update request that you want to delete.
3. Select the **Delete** option. You are then prompted to confirm that you *do* want to delete the cargo update request.
4. Press the **OK** button. Alternatively, press the **Cancel** button to abandon the deletion.

If you pressed the **OK** button, the cargo update request is then deleted. A confirmation message is displayed at the top of the screen, as shown in the following diagram.



Delete cargo update request
Cargo update request deleted successfully.

Running a Report

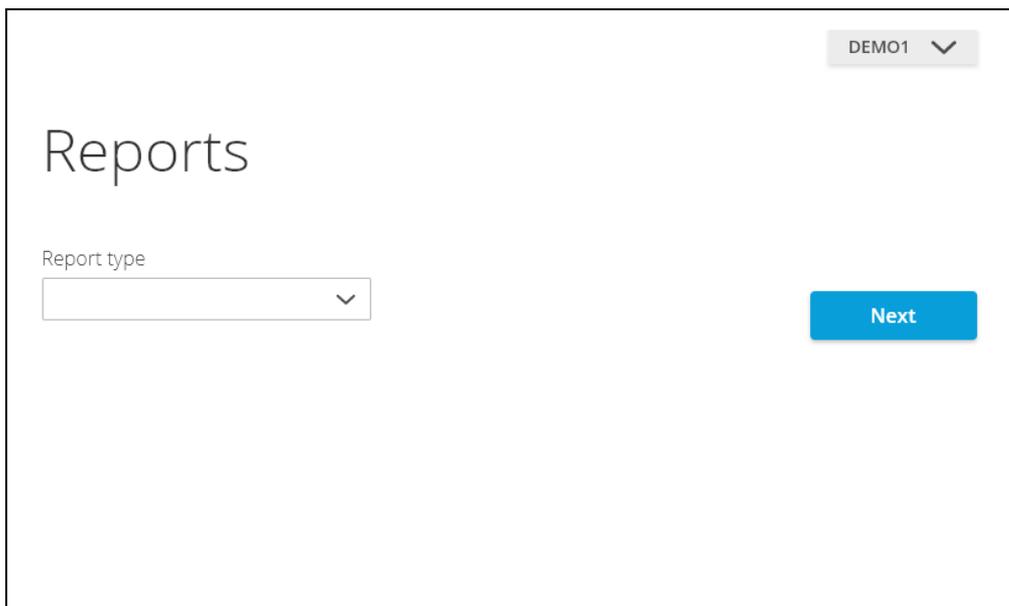
The **Reports** page enables you to run reports that are available to the Web Portal.

Note Your data access groups and role determine what you can see and do in the Web Portal.

» To run a report

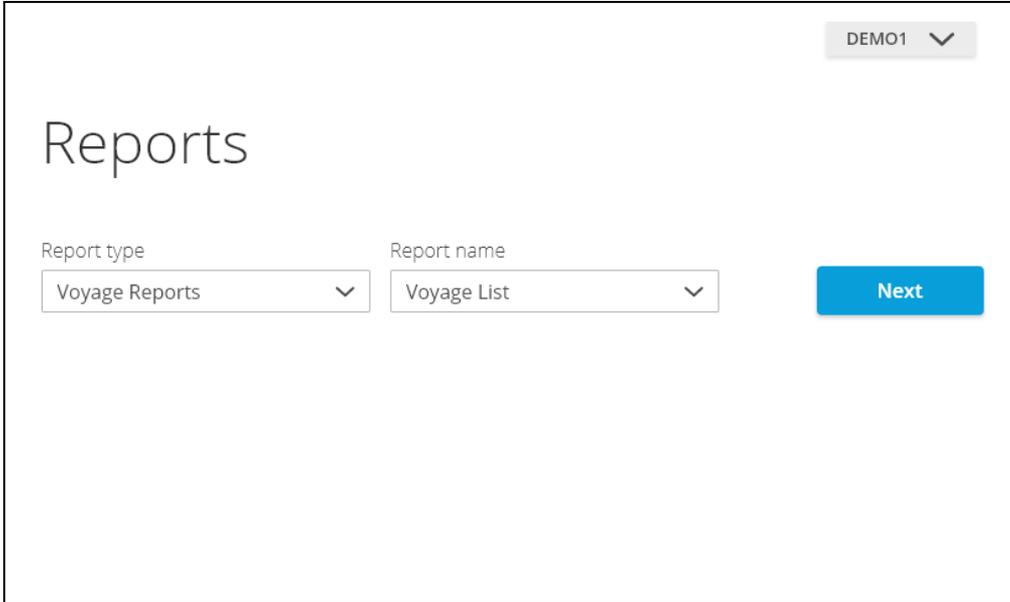
1. Click the **Reports** item in your navigator panel.

The **Reports** page is then displayed, as shown in the following diagram.



2. In the **Report type** drop-down list, select the type of report that you want to run. The **Report name** drop-down list is then displayed.

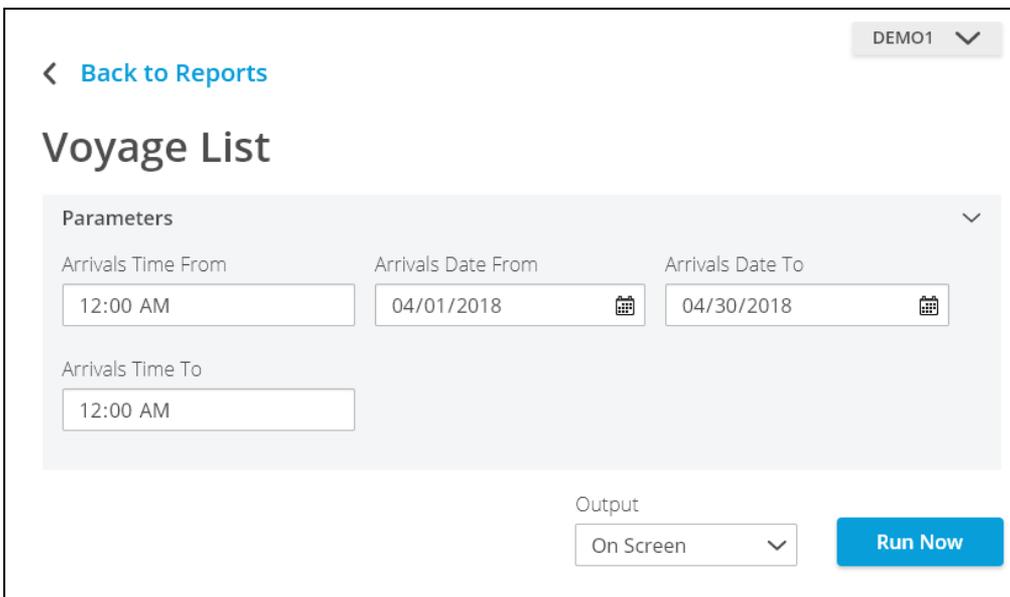
3. In the **Report name** drop-down list, select the report that you want to run, as shown in the following diagram.



The screenshot shows a web interface titled "Reports". In the top right corner, there is a dropdown menu labeled "DEMO1". Below the title, there are two dropdown menus: "Report type" with "Voyage Reports" selected, and "Report name" with "Voyage List" selected. To the right of these dropdowns is a blue button labeled "Next".

Reports of the selected report type are listed in the **Report name** drop-down list.

4. Press the **Next** button. The parameters of that report are then displayed.
5. Enter the required parameters for the specified report. An example of the Voyage List report parameters is shown in the following diagram.



The screenshot shows a web interface titled "Voyage List". In the top right corner, there is a dropdown menu labeled "DEMO1". Below the title, there is a blue link labeled "Back to Reports". Below the link, there is a "Parameters" section with a dropdown arrow. This section contains four input fields: "Arrivals Time From" (12:00 AM), "Arrivals Date From" (04/01/2018), "Arrivals Date To" (04/30/2018), and "Arrivals Time To" (12:00 AM). Below the parameters section, there is an "Output" dropdown menu with "On Screen" selected. To the right of the output dropdown is a blue button labeled "Run Now".

- In the **Output** drop-down list, select format in which you want to output the report. Press the:
 - On Screen** option to run the report and then view it in your browser.
 - HTML, PDF, CSV, RTF, XML, or TEXT** option to generate the report in the specified format and then e-mail it to specified recipients.

Note The available output formats depend on the set-up of that report in Master Terminal.

- Press the **Run Now** button to generate the report.

The screenshot displays the 'Voyage List' report configuration page. At the top left is a '< Back to Reports' link. At the top right is a 'DEMO1' dropdown menu. The main heading is 'Voyage List'. Below it is a 'Parameters' section with a dropdown arrow. It contains four input fields: 'Arrivals Time From' (12:00 AM), 'Arrivals Date From' (04/01/2018 with a calendar icon), 'Arrivals Date To' (04/30/2018 with a calendar icon), and 'Arrivals Time To' (12:00 AM). Below the parameters is an 'Output' section with a dropdown menu currently set to 'On Screen'. To the right of the dropdown are two buttons: 'Open Report' and 'Run Now'.

Note Each time that you select a different format, you must press the **Run Now** button to generate the report in that format.

- Press one of the following buttons.
 - Open Report**, to view the report in your browser if you selected the **On Screen** output option.
-
- Note** If you selected a file type as an output option, the report is displayed in your browser or it is downloaded to your default location, depending on your browser.
-
- Send Report**, to send the report as an e-mail attachment to specified recipients. The Add/Remove Recipients screen is then displayed. Specify the recipients of the report and then press the **Send** button. For details, see "[Specifying E-mail Recipients](#)".

Note The **Send Report** button is displayed only if the selected output is not **On Screen**.

- Click on the **< Back to Reports** link to return to the **Reports** page or click the **Reports** item in your navigator panel.

Specifying E-Mail Recipients

The Add/Remove Recipients screen, shown in the following diagram, enables you to specify the recipients of an e-mail that you send from the Web Portal; for example, a report or a cargo update request.

Y/N	Name	Email
<input checked="" type="checkbox"/>	Demo User	demo@jadelogistics.com

If you have previously sent an e-mail from the Web Portal, e-mail recipients are displayed in the table on the Add/Remove Recipients screen. You can add more recipients, if required.

» To specify a recipient to receive the e-mail

1. If the recipient is not displayed in the table on the Add/Remove Recipients screen, you can add that recipient, if required.
 - a. In the **Email** text box, enter the e-mail address of the recipient.
 - b. In the **Name** text box, enter the name of the recipient.
 - c. Press the **Add Contact** button.

The e-mail recipient is then displayed in the table on the Add/Remove Recipients screen.

2. In the table on the Add/Remove Recipients screen, check the check box at the left of each recipient to whom you want to send the e-mail.
3. Press the **Send** button. Alternatively, press the **Cancel** button to close the Add/Remove Recipients screen without sending the e-mail

The e-mail is then sent to the specified recipients.

» To remove a recipient from the Add/Remove Recipients screen

1. Check the check box at the left of the recipient whom you want to remove.
2. Press the **Delete Contacts** button.

The recipient is no longer displayed in the table on the Add/Remove Recipients screen.

Cargo Receipts

If your current terminal is configured to use a voyage process other than the **Master Terminal Default** and depending on your role, you can view bookings. You cannot edit bookings from the Web Portal but you can create bookings or pre-notifications by loading an EDI file. For details, see "[Adding Pre-notified Items and Bookings](#)".

To view or add bookings, you require one or both of the following permissions on the **Web Services** sheet of the **Terminal** roles.

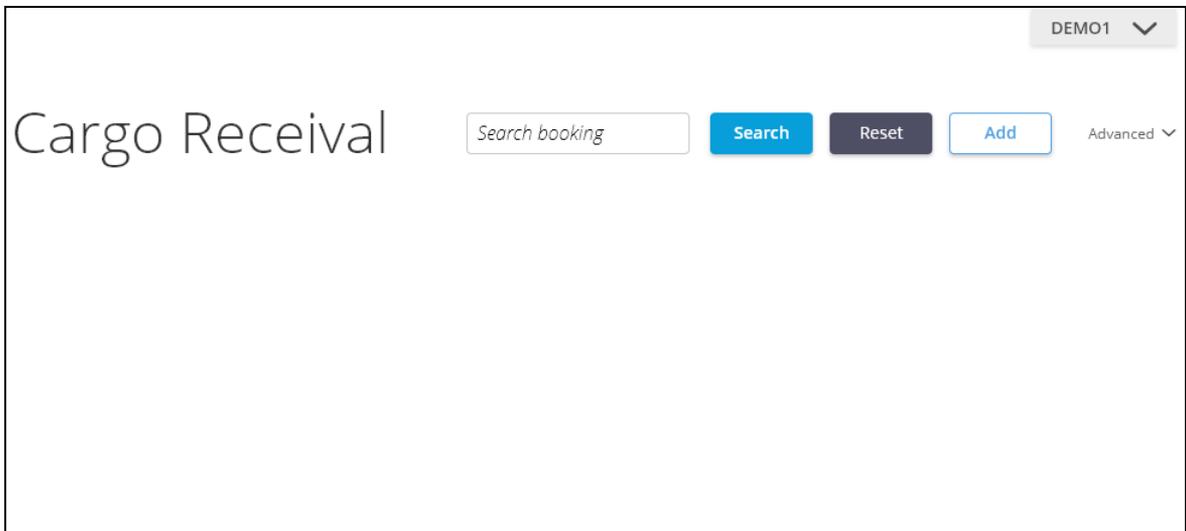
- **Cargo Receipt Add**, which enables you to create a release request. If you do not have this permission, the **Add** button is not displayed on the **Cargo Receipt** page.
- **Cargo Receipt View**, which enables you to view release requests. If you do not have this permission, the **Cargo Receipt** item is not displayed in your navigator panel.

For details, see "[Maintaining Security Profiles](#)", in your *Master Terminal System Administration Guide*.

» To view bookings

1. Click the **Cargo Receipt** item in your navigator panel.

The **Cargo Receipt** page, shown in the following diagram, is then displayed.



2. To perform a simple search, enter the complete booking number in the **Search booking** text box.

Note Leave the search text box empty, to search for all of the cargo items to which you have access.

3. To specify additional search parameters, select the **Advanced** drop-down item and then specify details about the booking that you want to find.
4. Press the **Search** button. Alternatively, press the **Reset** button to clear the text boxes and any search results from the table on the **Cargo Receipt** page.

The following diagram shows an example of the results of a non-filtered search.

Booking ID	Vessel	External Voyage Code	Status	On Site	Prenote	
0161657122	ATH1234	ATH2234	Active	1	0	...
0161664707	ATH1234	ATH2234	Active	0	0	...
0161667209	ATH1234	ATH2234	Active	0	0	...
0161667361	ATH1234	ATH2234	Active	0	0	...
0161667606	ATH1234	ATH2234	Active	0	0	...

Note Your data access groups and role determine what you can see and do in the Web Portal.

The first 20 items that match your search criteria are displayed in the search results. Press the **Load more** button to view more bookings. Alternatively, use the Advanced search parameters to further refine your search.

- The **Status** column displays the booking status.
 - The **On Site** column displays how many items in the booking are on site.
 - The **Prenote** column displays how many items in the **On Site** column are pre-notified items.
5. To view the details of a booking:
- a. Press the options drop-down menu button at the right of the booking that you want to view.
 - b. Select the **View** option. Booking details are then displayed. The **Main Details** tab displays general and voyage details about the booking. Click on the **Booking Item Details** tab to view the items on the booking.
 - c. Press the **Print** button, to print the booking details.
 - d. Click on the **< Back to search results** link, to return to the search results on the **Cargo Receival** page.

Adding Pre-Notified Items and Bookings

If your current terminal is configured to use a voyage process other than the **Master Terminal Default** and depending on your role, you can load files into the Web Portal to create pre-notifications and bookings.

After you press the **Save** button, the file is loaded in to EDI Operations, verified, and then loaded into the database. EDI processing creates a booking with pre-notified cargo attached for the voyage.

» **To load a Pre-note EDI file**

1. Click the **Cargo Receiptal** item in your navigator panel. The **Cargo Receiptal** page is then displayed.
2. Press the **Add** button. The Load Prenotes screen, shown in the following diagram, is then displayed.

DEMO1 ▾

[← Back to Cargo Receiptals](#)

Load Prenotes

Vessel

Select Vessel ▾

External Voyage Code *

Pre-note File To Load *

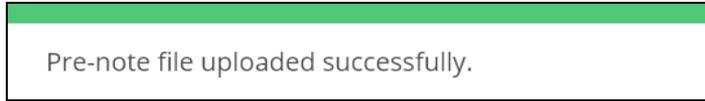
Browse

Cancel Load File

3. To return to the **Cargo Receiptal** table, click on the **< Back to Cargo Receiptals** link at the upper left.
4. In the **Vessel** drop-down list, select the vessel.
5. In the **External Voyage Code** text box, enter the external voyage code of the voyage.
6. Press the **Browse** button at the right of the **Pre-note File to Load** text box, to select the **.csv** file that you want to load.
7. Press the **Load File** button, to load the EDI file. Alternatively, press the **Cancel** button to abandon your entries.

Note Your system administrator specifies the format of the EDI file in the **EDI Prenote Format** text box of the **Voyage Processes** code table. For details, see "[Voyage Processes Code Table](#)", in your *Master Terminal System Codes Reference*.

If you pressed the **Load File** button, a screen like that shown in the following diagram then confirms that you loaded the pre-note file successfully.



The **Cargo Receival** page is then redisplayed and the booking status is **Pending**. The booking expires 48 hours after you created it.

Cargo Releases

If your current terminal is configured to use a voyage process other than the **Master Terminal Default** and depending on your role, you can view release requests. You cannot edit release requests from the Web Portal but you can create release requests for specified items. For details, see "[Adding Containers to a Release](#)".

To view or add release requests, you require one or both of the following permissions on the **Web Services** sheet of the **Terminal** roles.

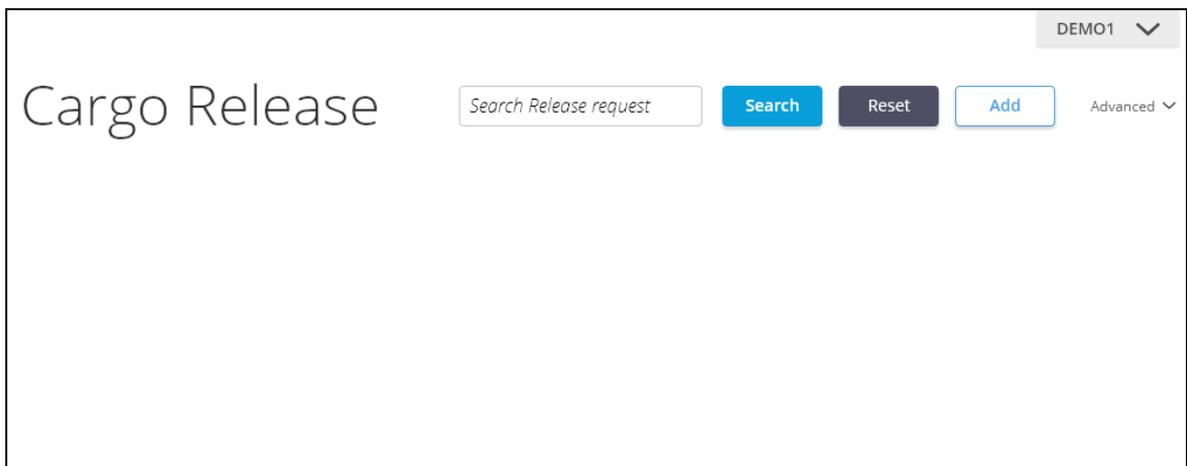
- **Cargo Release Add**, which enables you to create a release request. If you do not have this permission, the **Add** button is not displayed on the **Cargo Release** page.
- **Cargo Release View**, which enables you to view release requests. If you do not have this permission, the **Cargo Release** item is not displayed in your navigator panel.

For details, see "[Maintaining Security Profiles](#)", in your *Master Terminal System Administration Guide*.

» To view release requests

1. Click the **Cargo Release** item in your navigator panel.

The **Cargo Release** page, shown in the following diagram, is then displayed.



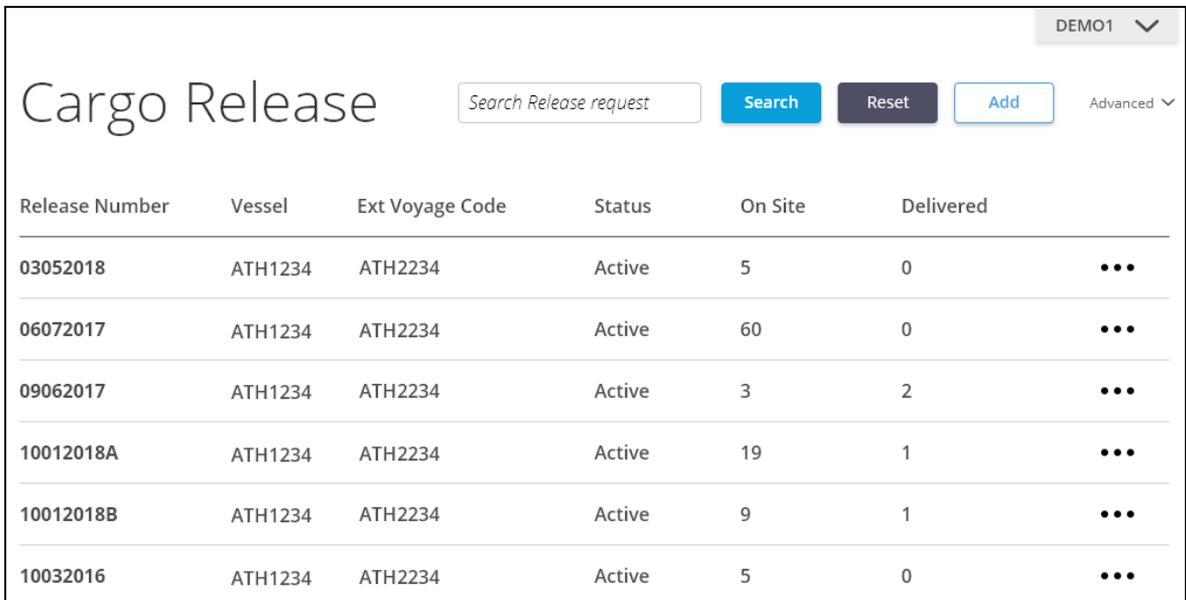
2. To perform a simple search, enter the complete release request identifier in the **Search Release request** text box.

Note Leave the search text box empty, to search for all of the release requests to which you have access.

- To specify additional search parameters, select the **Advanced** drop-down item and then specify details about the release request that you want to find.
- Press the **Search** button.

Alternatively, press the **Reset** button to clear the text boxes and any search results from the table on the **Cargo Release** page.

The following diagram shows an example of the results of a non-filtered search.



The screenshot shows the 'Cargo Release' web portal interface. At the top right, there is a 'DEMO1' dropdown menu. Below the title 'Cargo Release', there is a search bar with the placeholder text 'Search Release request', a blue 'Search' button, a dark grey 'Reset' button, and a light blue 'Add' button. To the right of these buttons is an 'Advanced' dropdown menu. Below the search area is a table with the following columns: Release Number, Vessel, Ext Voyage Code, Status, On Site, and Delivered. The table contains six rows of data, each with a three-dot menu icon to its right.

Release Number	Vessel	Ext Voyage Code	Status	On Site	Delivered	
03052018	ATH1234	ATH2234	Active	5	0	...
06072017	ATH1234	ATH2234	Active	60	0	...
09062017	ATH1234	ATH2234	Active	3	2	...
10012018A	ATH1234	ATH2234	Active	19	1	...
10012018B	ATH1234	ATH2234	Active	9	1	...
10032016	ATH1234	ATH2234	Active	5	0	...

Note Your data access groups and role determine what you can see and do in the Web Portal.

The first 20 items that match your search criteria are displayed in the search results. Press the **Load more** button to view more release requests. Alternatively, use the Advanced search parameters to further refine your search.

- The **Status** column displays the status of the release request.
 - The **On Site** column displays the number of cargo items that are on site and are assigned to the release request.
 - The **Delivered** column displays the number of cargo items that are off site and are assigned to the release request.
- To view the details of a release request:
 - Press the options drop-down menu button at the right of the release request that you want to view.
 - Select the **View** option. Release request details are then displayed. The **Main Details** tab displays general and voyage details about the release request. Click on the **Reserve Details** tab to view the cargo items on the release request.
 - Press the **Print** button, to print the release request details.
 - Click on the **< Back to search results** link, to return to the search results on the **Cargo Release** page.

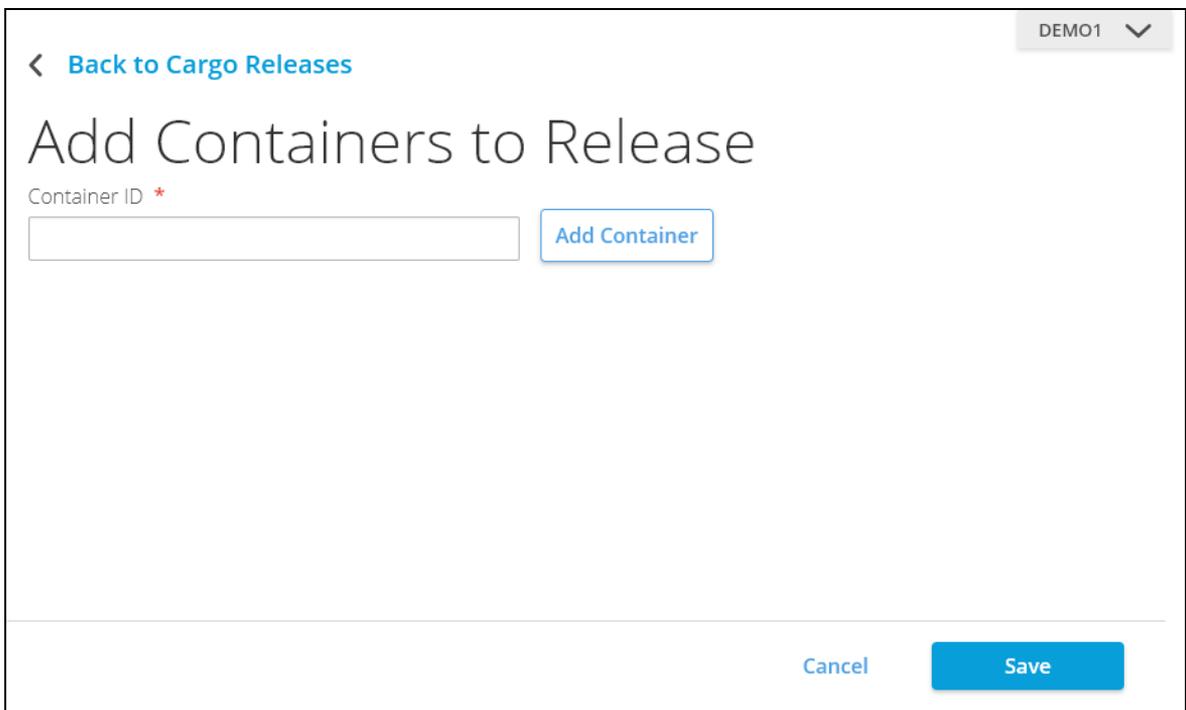
Adding Containers to a Release

If your current terminal is configured to use a voyage process other than the **Master Terminal Default** and depending on your role, you can add containers to a release request.

After you press the **Save** button, the release request identifier is automatically generated, the release type defaults to **Road**, and the release request operator defaults to the cargo item operator.

» **To add containers to a release request**

1. Click the **Cargo Release** item in your navigator panel. The **Cargo Release** page is then displayed.
2. Press the **Add** button. The Add Containers to Release screen, shown in the following diagram, is then displayed.



3. To return to the **Cargo Release** table, click on the **< Back to Cargo Releases** link at the upper left.
4. In the **Container ID** text box, enter the identifier of an on-site container that you want to add to the release request.

5. Press the **Add Container** button. The container is then displayed in the **Container List** table, shown in the following diagram.

DEMO1 ▾

< [Back to Cargo Releases](#)

Add Containers to Release

Container ID *

Container List ▾

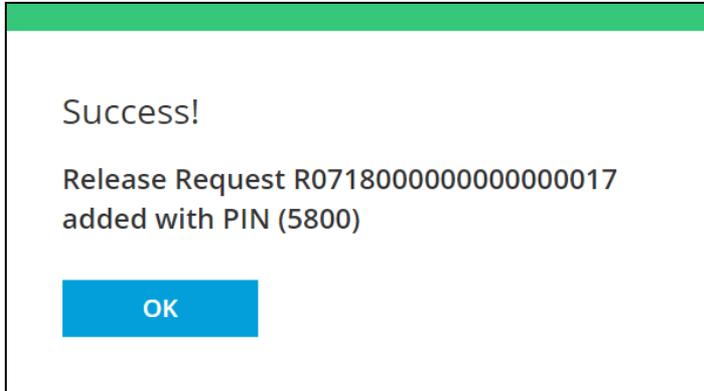
A list of pending containers that will be added to the cargo release request

ID	ISO Type	Operator	
HG3216546	ISO Container	ACME	Remove

To remove a container from the **Container List** table, click on the **Remove** text at the right of the table row.

6. Repeat steps 4 and 5, earlier in this instruction, to add or remove containers to the release request.
7. Press the **Save** button, to save the containers listed in the **Container List** table to the release request. Alternatively, press the **Cancel** button to abandon your entries.

If you pressed the **Save** button, a screen then confirms that you created the release request successfully. If your terminal is configured to generate a PIN, the PIN is displayed on this screen, as shown in the following diagram.



The **Cargo Release** page is then redisplayed and the release request status is **Active**. The release request expires 48 hours after you created it.

Maintaining Work Orders

If the terminal is configured to use a voyage process other than the **Master Terminal Default** and depending on your role, you can view work orders.

You can edit work orders with the **User Entry** or **Pending Approval** status in the Web Portal and you can create cargo or voyage work orders. For details, see "[Adding a Work Order](#)".

Note Your data access groups and role determine what you can see and do in the Web Portal.

To view or add work orders, you require one or both of the following permissions on the **Web Services** sheet of the **Terminal** roles.

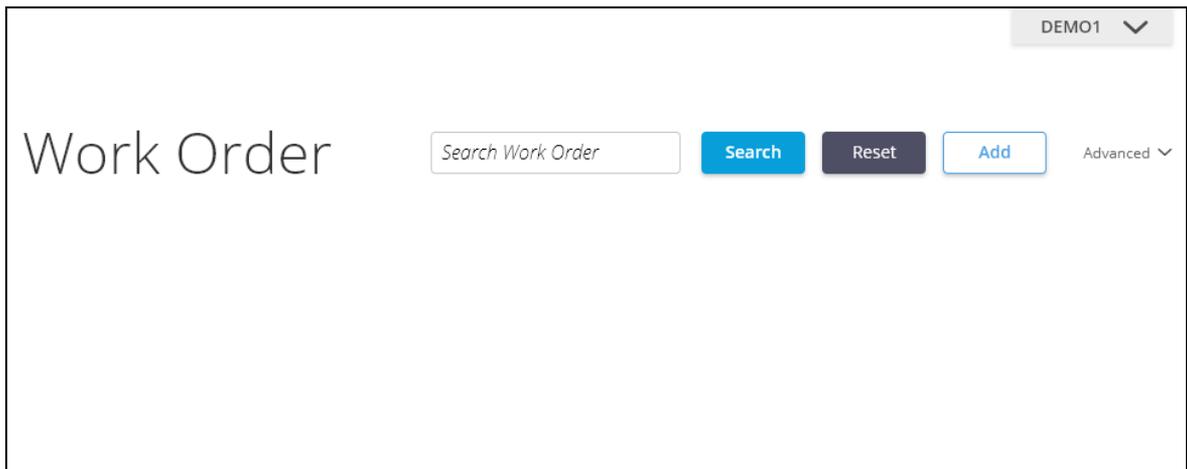
- **Work Order Maint**, which enables you to create a work order. If you do not have this permission, the **Add** button is not displayed on the **Work Order** page.
- **Work Order View**, which enables you to view work orders. If you do not have this permission, the **Work Order** item is not displayed in your navigator panel.

For details, see "[Maintaining Security Profiles](#)", in your *Master Terminal System Administration Guide*.

» To view work orders

1. Click the **Work Order** item in your navigator panel.

The **Work Order** page, shown in the following diagram, is then displayed.

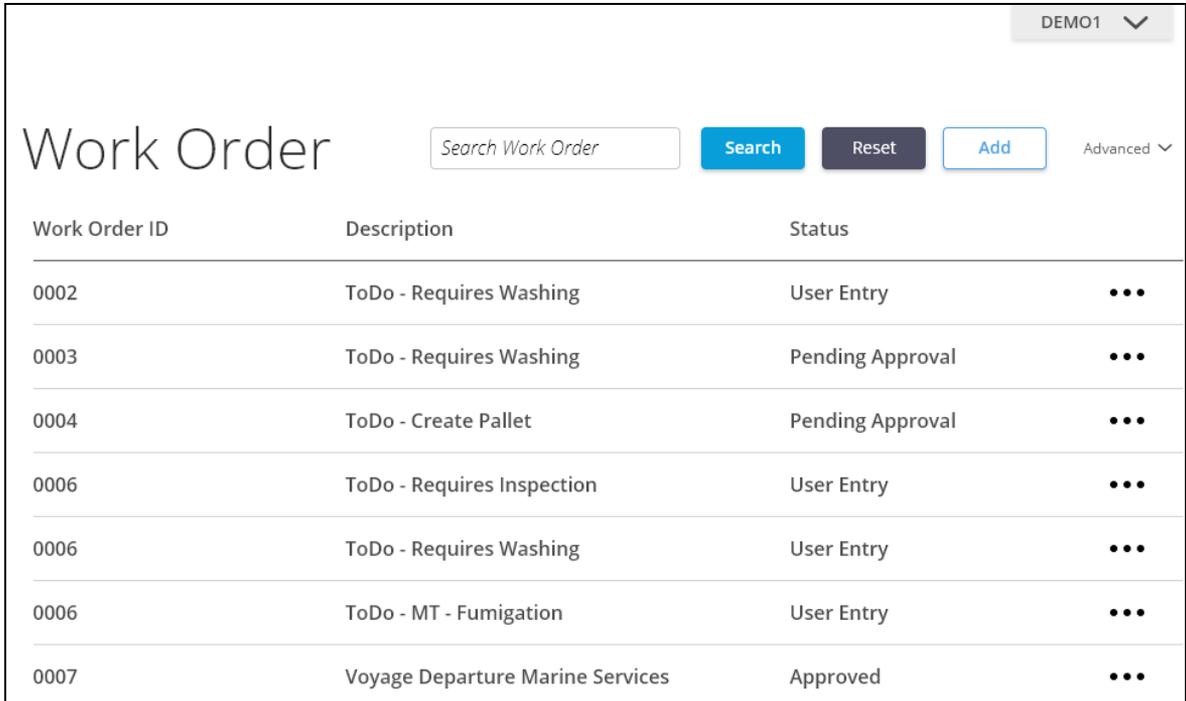


2. To perform a simple search, enter the complete work order number in the **Search Work Order** text box.

Note Leave the search text box empty, to search for all of the cargo items to which you have access.

3. To specify additional search parameters, select the **Advanced** drop-down item and then specify details about the work order that you want to find.
4. Press the **Search** button. Alternatively, press the **Reset** button to clear the text boxes and any search results from the table on the **Work Order** page.

The following diagram shows an example of the results of a non-filtered search.



Work Order ID	Description	Status	
0002	ToDo - Requires Washing	User Entry	...
0003	ToDo - Requires Washing	Pending Approval	...
0004	ToDo - Create Pallet	Pending Approval	...
0006	ToDo - Requires Inspection	User Entry	...
0006	ToDo - Requires Washing	User Entry	...
0006	ToDo - MT - Fumigation	User Entry	...
0007	Voyage Departure Marine Services	Approved	...

The first 20 items that match your search criteria are displayed in the search results. Press the **Load more** button to view more work orders. Alternatively, use the Advanced search parameters to further refine your search.

- The **Description** column displays the work order description.
 - The **Status** column displays the work order status.
5. To view the details of a work order:
- a. Click the options button at the right of the work order that you want to view.
 - b. Select the **View** option. Work order details are then displayed.
 - c. Click the **Print** button, to print the work order details.
 - d. Click on the **< Back to search results** link, to return to the search results on the **Work Order** page.

Adding a Work Order

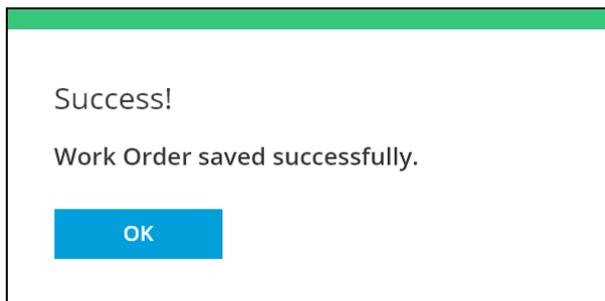
If the terminal is configured to use a voyage process other than the **Master Terminal Default** and depending on your role, you can add cargo and voyage work orders in the Web Portal.

» To add a work order

1. Click the **Work Order** item in your navigator panel. The **Work Order** page is then displayed.
2. Press the **Add** button. The Work Order screen is then displayed.

3. In the **Work Order** combo box, select the:
 - **Cargo Work Order** item to create a work order for one or more cargo items.
 - **Voyage Work Order** item to create a work order for a voyage.
4. Press the **Next** button. If you are creating a:
 - Cargo work order, the **Cargo Work Order** page is then displayed. Describe the work order and then specify the cargo to which the work order applies.
 - Voyage work order, the **Voyage Work Order** page is then displayed. Describe the work order and the voyage to which it applies.
5. To return to the **Work Order** page, click on the **< Back to Work Order Search** link at the upper left.
6. Press the **Save** button, to save the work order details. Alternatively press the **Cancel** button to abandon your entries.

If you pressed the **Save** button, a screen then confirms that you created the work order successfully.



The **Work Order** page is then redisplayed. The system automatically generates the work order identifier and the new work order has the **Pending Approval** status.

Appendix A Web Portal Configuration Overview

This section contains an overview about how to configure the Web Portal:

- [Reports](#)
- [Users](#)

Making a Report Available in the Web Portal

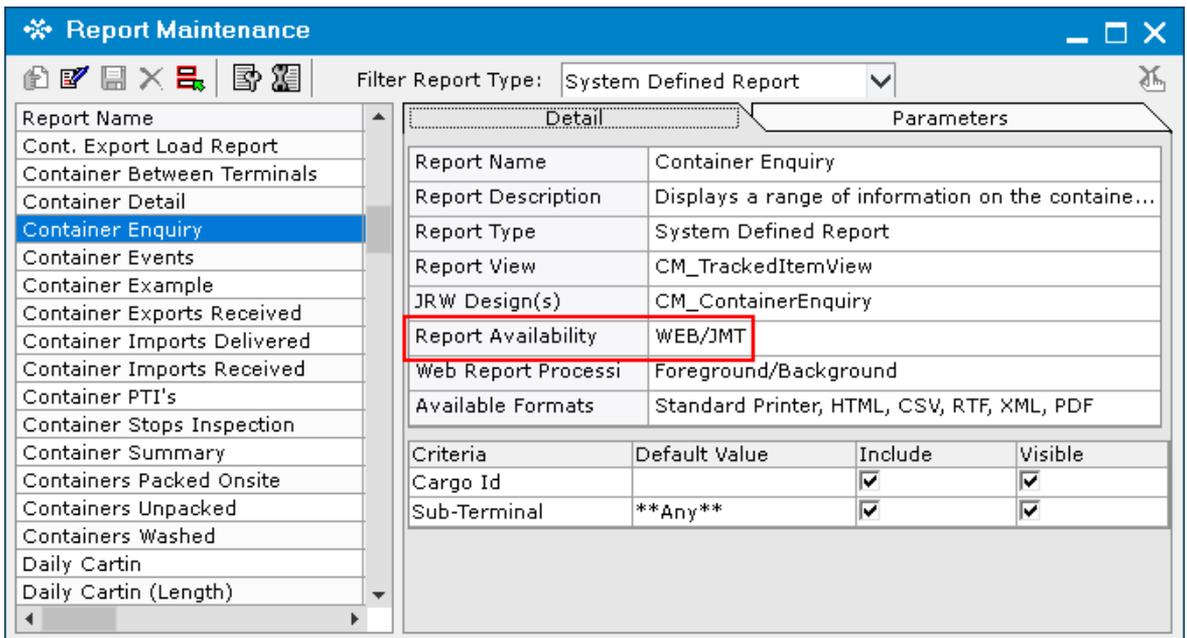
The Report Maintenance screen enables you to make selected reports available in the Web Portal. In addition, you can:

- Specify the allowable output options for a report; for example, screen, HTML, CSV, or PDF.
- Specify whether users can run the report in the background or foreground.

For details, see "[Creating a Report](#)", in your *Master Terminal System Administration Guide*.

» To make a report available in the Web Portal

- Select the **WEB** or **JMT/WEB** item in the **Report Availability** combo box as shown in the following diagram.

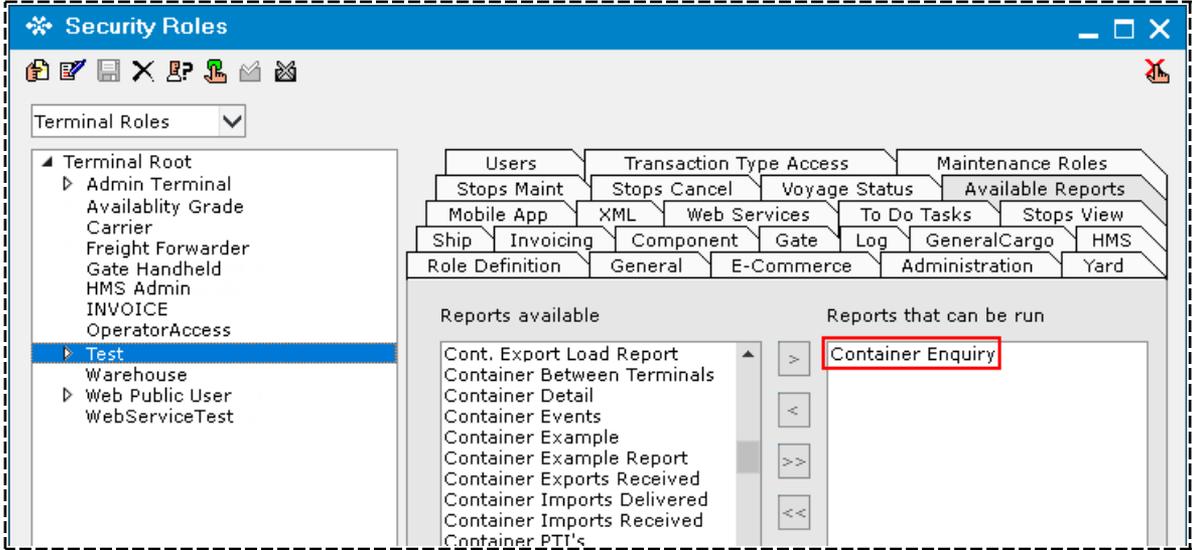


To run the report in the Web Portal, the report must be available to users via their terminal security role.

» To make a report available to a user

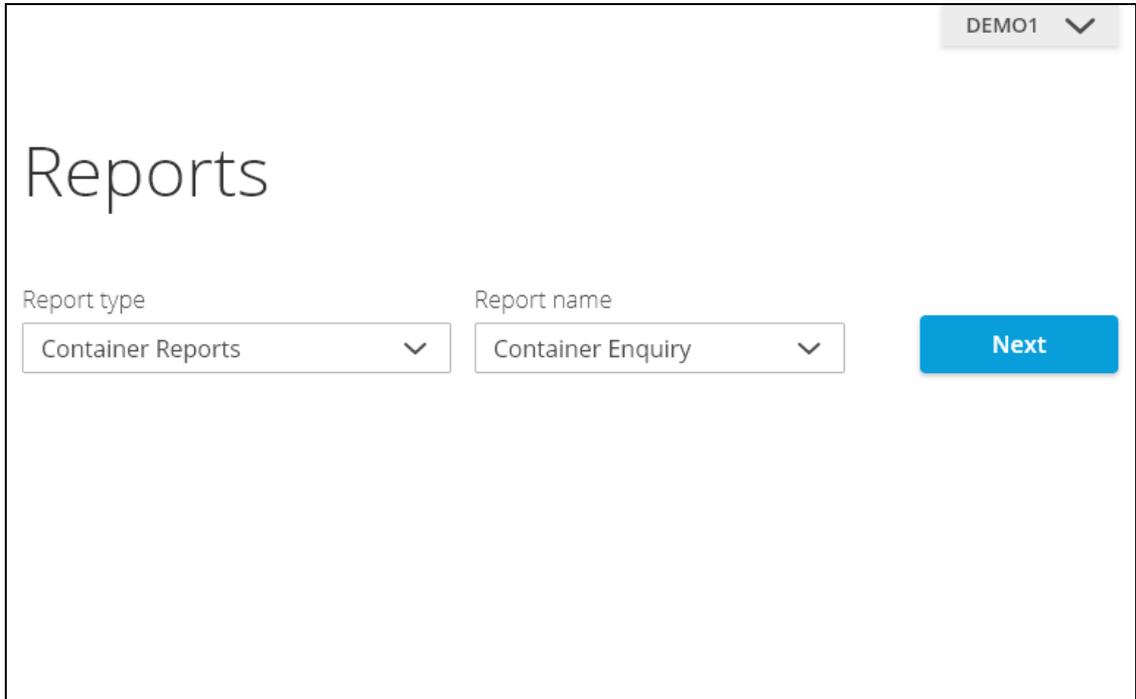
- Ensure that the report is in the **Reports that can be run list** of the terminal role of each user who must run the report in the Web Portal.

In the example shown in the following diagram, the **Container Enquiry** report is available to users who have the **Test** terminal role.



For details, see "[Maintaining Security Profiles](#)", in your *Master Terminal System Administration Guide*.

After you make a report available to the Web Portal and the required roles, the report is available on the **Reports** page, as shown in the following diagram. For details, see "[Running a Report](#)".



Note The data that is output to the report depends on the data access groups of the user who is running the report.

Setting Up Web Portal Users

Master Terminal data access groups and security roles enable you to specify what data the Web Portal users can access and maintain. You can create a:

- User with an account who signs into the Web Portal to view or maintain their cargo or voyages. A user with an account could be an external user (for example, shipping line, carrier, consignee, agent) or a Master Terminal user.

Set up a user with an account and a password in Master Terminal. The same password rules apply to the Web Portal user accounts and Master Terminal user accounts. For details, see ["Adding a New User"](#), in your *Master Terminal System Codes Reference*.

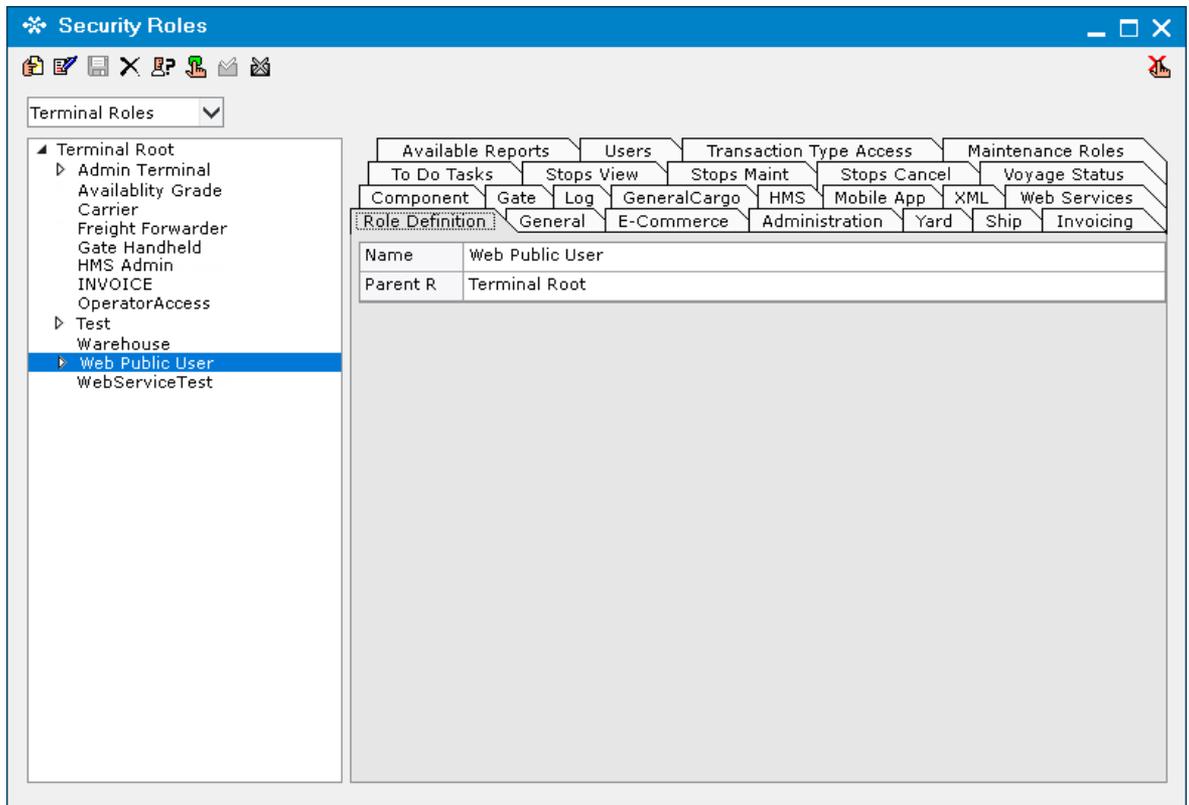
- Guest user, who is a user without an account or a Web Portal sign in. Guest users are likely to have restricted access to Web Portal data and functionality; for example, you could set up a guest user to be able to perform a quick search and to view voyage schedules only.

Setting Up the Web Portal Guest User

Set up *one* guest user for the Web Portal. A guest user does not have an account with your terminal and can be anyone who is accessing the Web Portal.

» To set up a Web Portal guest user

1. Define a terminal security role for guest users by using the Security Roles screen, shown in the following diagram.



To enable guest users to:

- View the shipping schedule, check the **Get Vessel Schedule** check box on the **Web Services** sheet.
- Use the Quick Search to search for cargo, check the one or more of the following check boxes on the **General** sheet.
 - **Cargo Quick View**, to enable access to the **Quick Search**.
 - **Cargo Quick View Partial Match Search**, to enable guest users to search for cargo by using a partial identifier instead of a complete identifier.
 - **BoL Quick View**, to allow guest users to search for cargo on a Bill Of Lading (BOL).
 - **Booking Quick View**, to allow guest users to search for cargo on a booking.
- View cargo item details, check the **Container Enquiry Window View** check box on the **General** sheet.

For details, see "[Maintaining Security Profiles](#)", in your *Master Terminal System Administration Guide*.

2. Define the data access groups that apply to guest users by using the following code tables.

- [Carrier Data Access Groups](#)
- [Consignees/Consignors Data Access Groups](#)
- [Customs Agent Data Access Groups](#)
- [Operator Data Access Groups](#)
- [Organization Data Access Groups](#)
- [SubTerminal Data Access Groups](#)

If you do not specify any data access groups, guest users can see *all* cargo.

3. Create a guest user and assign the security roles and data access groups, by using the **Users** code table. For details, see "Adding a New User", in your *Master Terminal System Codes Reference*.

The screenshot shows the 'System Administration' window with the 'Users' table selected. The 'WEB' user is highlighted. The 'Terminal Access' configuration for this user is shown on the right, with the 'Details' tab active.

Users		Terminal Access			
User ID	Name	Details	Alert Types	Event Types	Email Address Access
ABC	ABC User	User ID			WEB
ADMIN	Admin User	Name			Web Portal User
BGPUSER	BGPUSER	Status			Enabled Normal
FORWARD	Freight Forwarder	Auto-disable if inactive			<input type="checkbox"/>
TODO_COMP	Todo Complete	Password (First/Reset)			
TEST	Test	Password never expires			<input checked="" type="checkbox"/>
WEB	Web Portal User	Organization			WEB
		Carrier Data Access			Web Portal User
		Consignee Data Access			Web Portal User
		Customs Agent Data Access			Web Portal User
		Operator Data Access			Web Portal User
		Organization Data Access			Web Portal User
		SubTerminal Data Access			Web Portal User
		System Security Role			
		Not Available For Entry			<input type="checkbox"/>
		Email Address			
		Add New Email (e.g. user@domain.co)			
		Locale			
		Single signon only			<input type="checkbox"/>

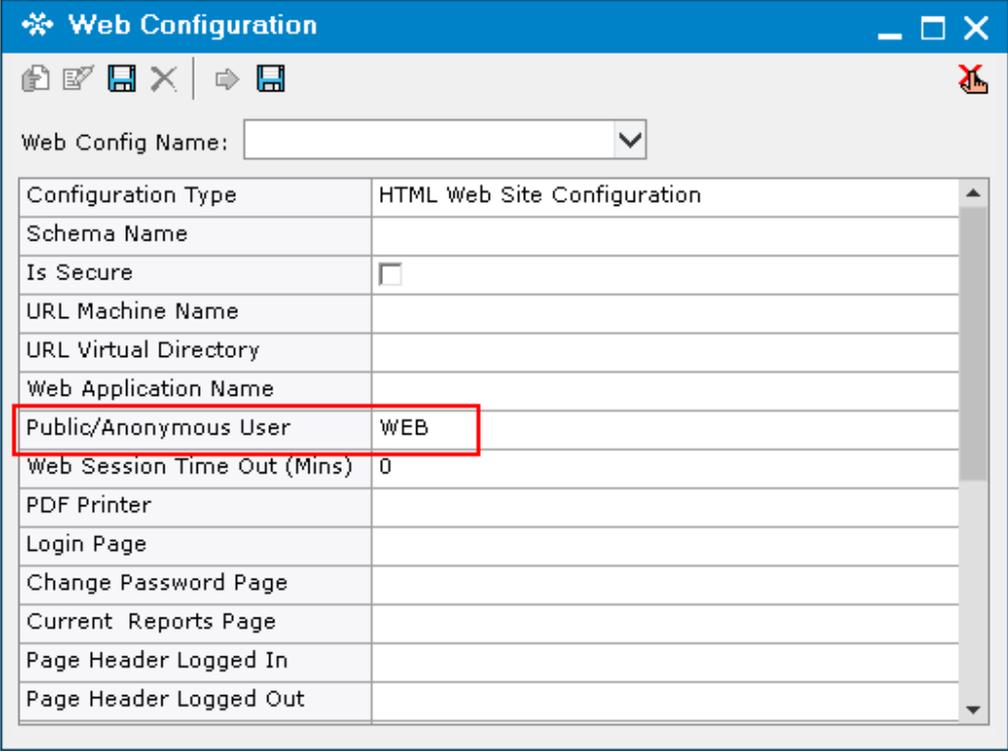
7 rows found

Do not specify an e-mail address and do not check the **Single signon only** check box.

On the **Terminal Access** sheet, specify the terminals that guest users can access.

Terminal Access			
Details	Alert Types	Event Types	Email Address Access
Allow	Terminal	Security Role	Default Cargo Ty
<input checked="" type="checkbox"/>	Terminal 1	Web Public User	
<input type="checkbox"/>	Terminal 2		
<input checked="" type="checkbox"/>	Terminal 3	Web Public User	

- Specify the guest user in the **Public/Anonymous User** combo box on the Web Configuration screen, shown in the following diagram.



The screenshot shows a window titled "Web Configuration" with a toolbar and a table of settings. The "Public/Anonymous User" field is highlighted with a red box.

Configuration Type	HTML Web Site Configuration
Schema Name	
Is Secure	<input type="checkbox"/>
URL Machine Name	
URL Virtual Directory	
Web Application Name	
Public/Anonymous User	WEB
Web Session Time Out (Mins)	0
PDF Printer	
Login Page	
Change Password Page	
Current Reports Page	
Page Header Logged In	
Page Header Logged Out	

For details, see ["Using the Web Page Loader"](#), in your *Master Terminal System Administration Guide*.