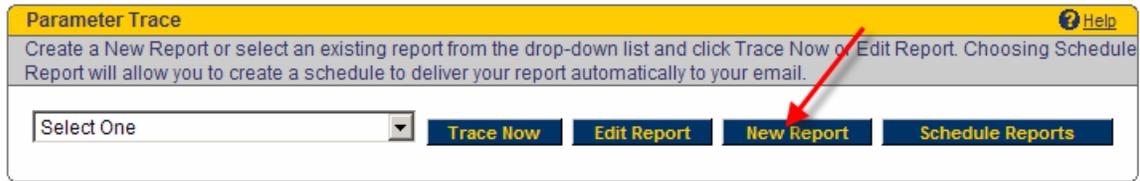


# ShipCSX Parameter Trace Quick Start Guide

## Section 1: How to set up a Basic Inbound or Outbound report.

### Step 1: Click New Report in the Parameter Trace section



Parameter Trace Help

Create a New Report or select an existing report from the drop-down list and click Trace Now or Edit Report. Choosing Schedule Report will allow you to create a schedule to deliver your report automatically to your email.

Select One Trace Now Edit Report New Report Schedule Reports

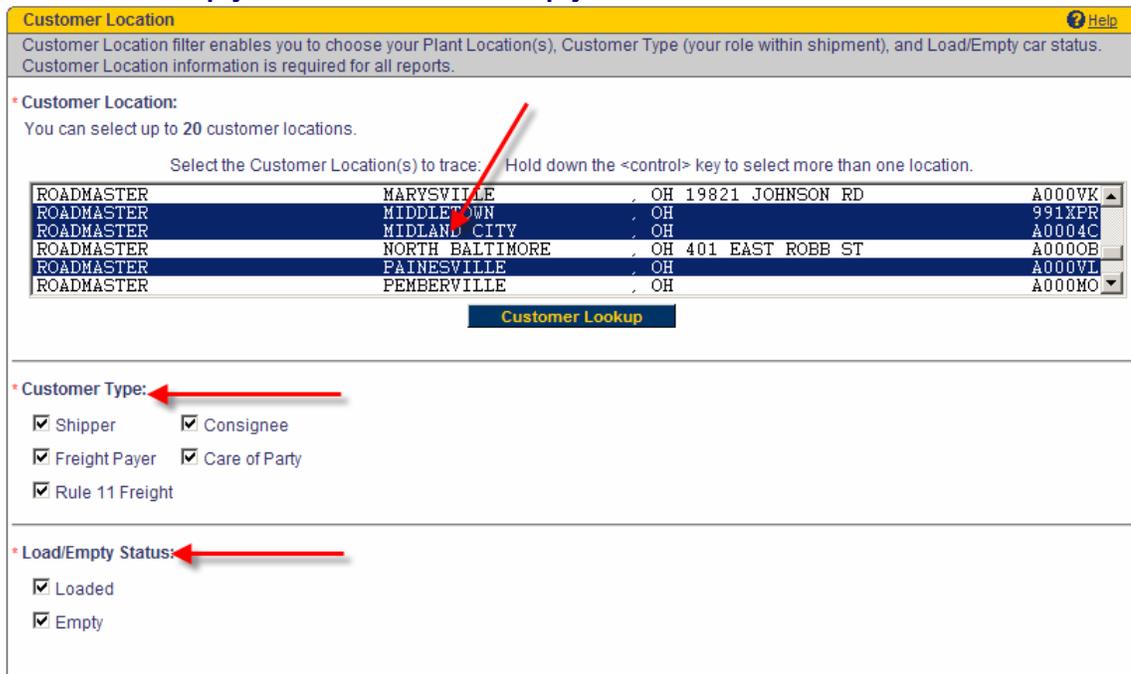
**Step 2: Within the Customer Location, select the location(s) you want to trace for.**  
(Hold the ctrl down to select multiple locations)

**Step 3: Then select the role the location would play in the shipment in the Customer Type.**  
(All Customer Types are selected, deselect the roles that do not apply)

Note: The Customer Type selections will determine whether the railcars in the report are inbound, outbound or both.

*Example: Selecting only Shipper would imply that the railcars are headed away (outbound) from the selected locations in Step 2. Selecting only Consignee and/or Care of Party would imply that the railcars are headed toward (inbound) to the selected locations in Step 2. Selecting Shipper, Consignee and Care of Party imply that you want to track railcars that are both inbound and outbound for the locations selected in Step 2.*

### Step 4: Select loaded or/and empty railcars in the Load/Empty Status section.



Customer Location Help

Customer Location filter enables you to choose your Plant Location(s), Customer Type (your role within shipment), and Load/Empty car status. Customer Location information is required for all reports.

\* Customer Location:  
You can select up to 20 customer locations.  
Select the Customer Location(s) to trace: Hold down the <control> key to select more than one location.

ROADMASTER	MARYSVILLE	OH	19821 JOHNSON RD	A000VK
ROADMASTER	MIDDLETOWN	OH		991XPR
ROADMASTER	MIDLAND CITY	OH		A0004C
ROADMASTER	NORTH BALTIMORE	OH	401 EAST ROBB ST	A0000B
ROADMASTER	PAINESVILLE	OH		A000VL
ROADMASTER	PEMBERVILLE	OH		A000MO

Customer Lookup

\* Customer Type:  
 Shipper  Consignee  
 Freight Payer  Care of Party  
 Rule 11 Freight

\* Load/Empty Status:  
 Loaded  
 Empty

### Step 4: Finally, save your report by giving it a name and clicking the Save button

Note: Clicking trace before saving *will not* save your report for future use

#### Create New Parameter Trace Report

Select your Customer Location and Report Format filter options before saving or tracing your report.

Report Name:

Name Your New Report

Trace Save Cancel



## Section 2: Adding filters to your Basic Report (Optional)

In Section 1, you learned how to set up a basic inbound or outbound report. You can also take that basic report and apply filters to them to capture a more specific trace. The Filter Options menu offers several options. Adding filters is optional. Below are examples of the ones most commonly used filters with the inbound and outbound reports.

**Edit Parameter Trace Report**

Select your Customer Location and Report Format filter options before saving or tracing your report.

Report Name:

**Trace** **Save** **Cancel** **Delete** **Schedule**

Filter Options	Filter Options
Report Summary	Billing
*Customer Location	Equipment
*Report Format	Pool Codes
Origin/Destination	Events
Current Location	Shipment Status
Commodity	Shipment Management

\* indicates required filter

**To get started, select the report you want to add filters to and click the Edit Report button.**

→ **Origin/Destination filter: Used to track railcars originating from a specific location or destined to a specific location.**  
**FOR INBOUND REPORTS:**

- Select a state and city from the Origin drop down lists, then click **ADD O/D Pair**
  - Locations can be removed from the list by clicking **REMOVE O/D Pair**

After adding your point of origin you'll only see traffic originating from that location that is inbound to your selected location.

**FOR OUTBOUND REPORTS:**

- Select a state and city from the Destination drop down lists, then click **ADD O/D Pair**
  - Locations can be removed from the list by clicking **REMOVE O/D Pair**

After adding your destination point you'll only see traffic shipped from your location that is destined to the location you selected.

→ **Current Location filter: Use this filter if you only want to see railcars when they have movement to/from specific city/states.**  
**FOR BOTH INBOUND AND OUTBOUND REPORTS:**

- Select the state and city using the drop down lists, then click **ADD LOCATION**
  - Locations can be removed from the list by using the **REMOVE LOCATION**

After adding your current locations, you'll only see traffic that has made a move to/from the selected current locations.

→ **Equipment filter: Used to track by specific equipment IDs or car types.**  
**FOR BOTH INBOUND AND OUTBOUND REPORTS:**

- Choose from 4 Options.
  - **Option 1** – Enter the equipment IDs you want to track into the entry box.
  - **Option 2** – If you have Railcar Tracking lists saved, you can select on or more lists to use..
  - **Option 3** – Car Order Car Types. Click the checkbox to retrieve a list of Car Order profiles that you order empty railcars for. The profiles displayed will be the car profiles associated to the location you selected and will be identical to the profiles you see in Car Order. Select one or more profiles from the list.
  - **Option 4** – AAR Car Types. Search cars types by entering either a car type code (ex. A405) or description (ex. Boxcar) Partial codes and descriptions can be used. Select one or more car types from the list.

Depending upon which option you choose, your report will only trace the specific equipment IDs or car types selected that is inbound or outbound from your location.

→ **Commodity filter: Used to track railcars containing a specific commodity.**  
**FOR BOTH INBOUND AND OUTBOUND REPORTS:**

- Type the commodity description or the STCC code, then click **FIND**
  - Note: You can search by a partial description (ex. Steel) or a partial STCC (ex. 3312)
- Select the commodities from list and click **ADD COMMODITY**
  - Commodities can be removed by clicking **REMOVE COMMODITY**

After adding your commodities, your report will not only trace railcars containing the selected commodities.

→ **Event filter: Used to monitor shipments when a specific event has occurred.**

- Select the events you want to monitor from the events list

After selecting events, your report will only trace traffic that has made a movement with the selected events

**After changes are made – DON'T FORGET TO SAVE YOUR REPORT!**

As a word of caution, be wary of applying too many filters to a report. Too many filters can cause your report to miss traces on railcars or not return any results at all. Typically reports only need to have one or two filters applied to get the results you need.



### Section 3: How to create a Custom View for your Report (Optional)

Every new report that is created has a default view assigned to it. This default view is called CSX Default Format. If the CSX Default Format does not contain the columns of information you want to see on your results, you have the option of creating a new view with the Custom View tool. Creating Custom View are optional.

The Custom View tool enables you to customize your report results by adding or removing fields and setting sort criteria. You can create a new view or edit an existing view.

#### To get started creating a view, select a report and click Edit.

- Click on the Report Format filter option
- At the bottom of the Report Format filter is the Custom View tool.
- Click Edit View or Create New View

Using the diagram below, each step is outlined on how to create a new view.

The screenshot shows a web-based interface titled "Editing an existing Custom View". At the top, there is a text input field for "View Name" with the placeholder "Name Your View Here", followed by buttons for "Save", "New", "Delete", and "Undo Edits". Below this are two main columns: "Available View Items" on the left and "Selected View Items" on the right. The "Available View Items" list includes: AAR CAR TYPE, AAR DESCRIPTION, ALLOW WEIGHT, BAD ORDER CODE, BAD ORDER DESCRIPTION, BOL NUMBER, BOL TIME, CLEARANCE, COAL CLASS, and COMMODITY CLASS. The "Selected View Items" list includes: EQUIPMENT ID, L/E, STCC DESCRIPTION, BOL DATE, SHIPPER FULL NAME, SHIPPER CITY, SHIPPER STATE, LAST EVENT DATE, LAST EVENT DESCRIPTION, and LAST EVENT FULL CITY. Between the columns are buttons: "Select >", "Select All >>", "<< Remove All", and "< Remove". At the bottom, there are "Sort By" dropdowns for "SHIPPER CITY", "EQUIPMENT ID", and an empty one, each with an "Ascending" sort order dropdown. Annotations with red arrows point to these elements: "1.) Add items to your view" points to the "Select >" button; "2.) Adjust the order of selected items" points to the up/down arrows in the "Selected View Items" list; "3.) Choose how you want to Sort your report" points to the sort order dropdowns; "4.) Name and Save your view" points to the "View Name" field and "Save" button. Blue text annotations describe the lists: "Available View Items are the fields available to add to your view" points to the left list, and "Selected View Items are the fields you want on your report" points to the right list.

Once a view is created it may be used with any of your reports within Parameter Trace and Event Notification.

## Section 4: Scheduling a Report (Optional)

You can schedule your Parameter Trace reports to be delivered to your email automatically. Reports can be delivered 7 days a week, up to 6 times a day and can be sent to multiple email address. Scheduling a report is optional.

- Click the **Schedule Reports** or **Schedule** buttons to access the Schedule Reports Screen.
- Click the Create New Schedule button

**Schedule Reports**

Create a new schedule by clicking the Create Schedule button. You can choose an existing schedule to edit or delete by clicking on the Edit or Delete Schedule buttons.

There are currently no scheduled reports. Please click the button Create Schedule to get started.

**Create Schedule** **View All**

Using the diagram below, follow the order of the numbers as steps to creating a schedule.

**Create Scheduled Report**

Parameter Trace Report **MY NEW REPORT** ← 1

**Report Run Day(s)** ← 2

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday

**Report Run Time(s) EST** ← 3

0800

1230

**Output Format:** ← 4

Comma Separated Format

**E-mail:** ← 5

email@csx.com

**Start Date:** ← 6

11-06-2009

**Expiration Date:** ← 6

02-04-2010

(Report duration limited to 90 days, at which time you will be automatically asked if you would like to renew this report schedule.)

7 → **Save** **Undo Edits** **Delete** **Back to Summary**

Below is an explanation of your scheduling options:

**1. Select the report you want to schedule from the Parameter Trace drop down list**

**2. Report Run Day(s)** – Choose which days you want to receive the report. All 7 days are selected. Uncheck the days you do not want to receive the report.

**3. Report Run Time(s) EST** – Select what time(s) you want to receive the report. You can select up to 6 times.

- *Note: Time selections must be 4 hours apart.*

**4. Output Format** - Determines what type of file you want your report to be delivered as.

- **Comma Separate Format** is a .csv file similar to Excel .xls file
- **HTML Format** is a .html file and will format your report just like you were viewing it in ShipCSX
- **Text Format** is a .txt file and will format your report into either WordPad or notepad

**5. E-mail** - Specify who you want the notification delivered to Your email address is automatically populated. You can add more email addresses by using (;) semicolon to separate each address.

**6. Start and Expiration Dates** - Determines when the automatic delivery (schedule) of the notification will start and end. Start Date indicates when to start the scheduled delivery. Expiration Date indicates when the scheduled delivery will stop. These dates are automatically selected for a timeframe of 365 days. You may change the dates or keep the default.

**7. Click the Save button**

