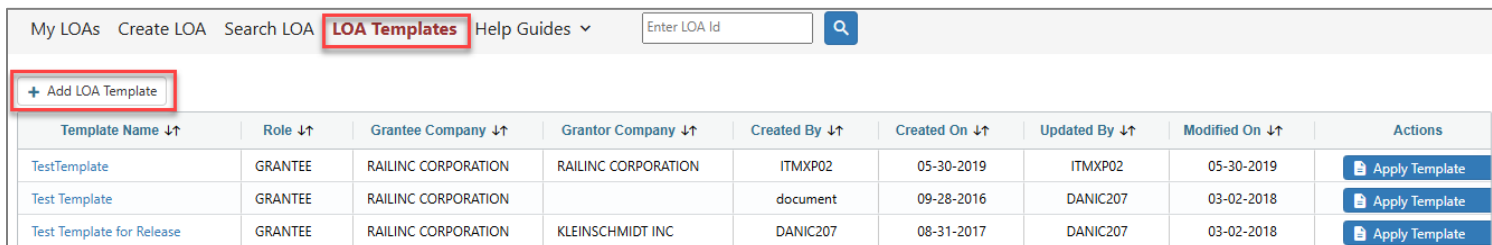


The Letter of Authorization (LOA) application enables companies to grant third-party users access to their data for a variety of purposes, including shipment and asset management. Users can electronically submit, approve, expire, revoke, and renew letters of authorization. Users who frequently create LOAs can create LOA templates and then apply the templates to efficiently create new LOAs.

Use the following procedure to create and apply LOA templates:

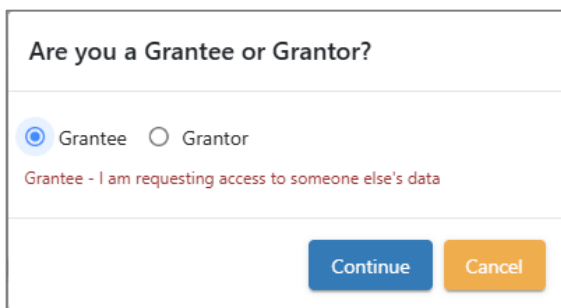
1. Select LOA Templates from the menu, and then select the Add LOA Template Button



The screenshot shows the top navigation bar with the following items: My LOAs, Create LOA, Search LOA, **LOA Templates** (highlighted with a red box), Help Guides, and a search bar labeled "Enter LOA Id". Below the navigation bar is a button labeled "+ Add LOA Template" (highlighted with a red box). Below the button is a table with the following columns: Template Name, Role, Grantee Company, Grantor Company, Created By, Created On, Updated By, Modified On, and Actions.

Template Name	Role	Grantee Company	Grantor Company	Created By	Created On	Updated By	Modified On	Actions
TestTemplate	GRANTEE	RAILINC CORPORATION	RAILINC CORPORATION	ITMXP02	05-30-2019	ITMXP02	05-30-2019	Apply Template
Test Template	GRANTEE	RAILINC CORPORATION		document	09-28-2016	DANIC207	03-02-2018	Apply Template
Test Template for Release	GRANTEE	RAILINC CORPORATION	KLEINSCHMIDT INC	DANIC207	08-31-2017	DANIC207	03-02-2018	Apply Template

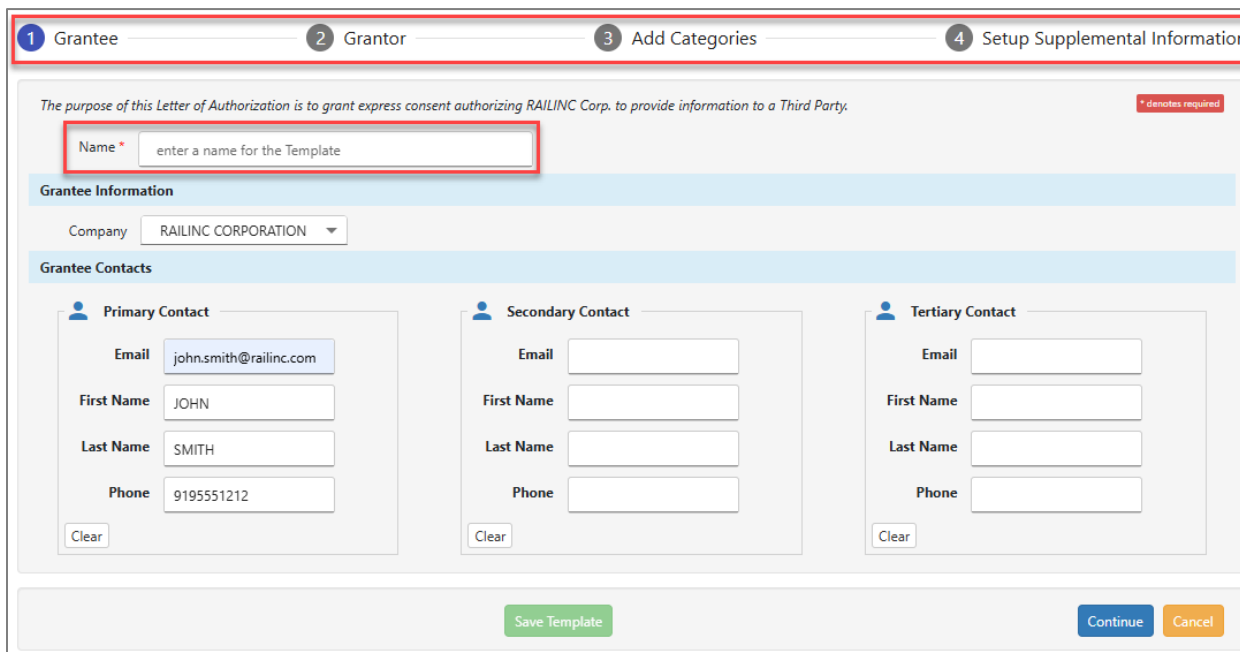
2. Select Grantee or Grantor



The screenshot shows a pop-up titled "Are you a Grantee or Grantor?". It has two radio buttons: "Grantee" (selected) and "Grantor". Below the radio buttons is a red text label: "Grantee - I am requesting access to someone else's data". At the bottom are two buttons: "Continue" (blue) and "Cancel" (orange).

A pop-up will prompt you to select whether you are a **Grantee** or **Grantor** and then select **Continue**. Most LOA creators are Grantees requesting access to information from a Grantor. The Create LOA Template page is displayed.

3. Name the template and modify information as needed



The screenshot shows the "Create LOA Template" page. At the top is a navigation bar with four tabs: 1 Grantee (selected), 2 Grantor, 3 Add Categories, and 4 Setup Supplemental Information. Below the tabs is a text area with the purpose of the LOA: "The purpose of this Letter of Authorization is to grant express consent authorizing RAILINC Corp. to provide information to a Third Party." Below this is a form with the following sections:

- Name ***: A text input field with the placeholder "enter a name for the Template" (highlighted with a red box).
- Grantee Information**: A section with a "Company" dropdown menu set to "RAILINC CORPORATION".
- Grantee Contacts**: A section with three contact forms:
 - Primary Contact**: Fields for Email (john.smith@railinc.com), First Name (JOHN), Last Name (SMITH), and Phone (9195551212). A "Clear" button is at the bottom.
 - Secondary Contact**: Fields for Email, First Name, Last Name, and Phone. A "Clear" button is at the bottom.
 - Tertiary Contact**: Fields for Email, First Name, Last Name, and Phone. A "Clear" button is at the bottom.

At the bottom of the page are three buttons: "Save Template" (green), "Continue" (blue), and "Cancel" (orange).

On the Grantee tab, enter a name for the template you want to create. Complete any or all fields on all four tabs of the Create LOA Template. Select **Continue** to move to the next tab. Unless you are creating a template to use for the same Grantor repeatedly, leave the fields on the Grantor tab blank. You can leave the Add Categories tab blank or select Sub-

Categories to use for your template, adding as many as you want. You can leave the Setup Supplemental Information tab blank or set up the Sub-Categories to use for your template, adding as many as you want.

Select **Save Template** at the bottom of any tab to save the LOA Template.

To apply a template, select **LOA Templates** from the main menu. Select the **Apply Template** button in the **Actions** column for the template that you want to apply to a new LOA. The Create LOA process is initiated. Complete the process in the same way as a new LOA.

Refer to the [Letter of Authorization User Guide](#) for more information. Contact Railinc's Customer Success Center at 877-RAILINC (877-724-5462) or csc@railinc.com if you need assistance.

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