Oakland Port Registry System

LMC Tutorial
Please choose a lesson from the list below:

- Login and Password Lessons
- Alerts/Notifications Lessons
- Company Profile Lessons
- Manage Trucks Lessons
- Manage Users Lessons
- Upload Driver and Truck Data
- View Reports
Login and Password Lessons

Please Select:

A  New User Login
B  Existing User Login
C  Forgot Password
D  Change Password
Lesson A – New User Login

**Step 1**
- Ensure that you have received an email titled “Oakland Port Registry Welcome and Account E-mail Verification”.

**Step 2**
- Select the ‘Verify your e-mail’ link. (This is a very important first step!)

**Step 3**
- Complete the Oakland Port Registry Login screen. Enter the user name and password provided in the e-mail.

**Step 4**
- 1. Click the I Agree button to log into the Oakland Port Registry System.
- 2. For help on this page and logging in Select Tutorials
Lesson A – New User Login cont’d.

Step 5
- Enter the password provided in the e-mail you received from the Port Customer Service Center.

Step 6
- Enter a new password and, Confirm New Password. New passwords require a minimum of 6 characters. At least one of the characters must be either a number or a special character from the following list: ~ ! @ # $ % ^ & * ( ), - _, =, +, { }, [ ], <, >, or ? (for example, password or p@ssword).

Step 7
- Click the “Change Password” button.

Step 8
- Click the “Continue” button to access the Oakland Port Registry System Home page.

Step 9
- For Help on any Page click Help/FAQ on the top menu bar.
Lesson B – Existing User Login

**Step 1**
- Complete the Drayage Truck Login screen. Enter the user name and password.

**Step 2**
- Click the I Agree button to log into the Oakland Port Registry System.
Lesson C – Forgot Password

Step 1
• Select the “Forgot My Password” link on the Oakland Port Registry Login screen.

Step 2
• Enter the e-mail Address attached to your User account.

Step 3
• Select the Submit button.

Step 4
• Click the “Return to Login Page” hyperlink in the e-mail.
Step 5
• Open the “Your new temporary password for the Oakland Port Registry.” e-mail in your inbox.

Step 6
• Enter Username and Password.

Step 7
• Click the I Agree button to log into the Oakland Port Registry System.
Lesson D – Change Password

**Step 1**
- After logging into the Oakland Port Registry System, select the My Account link from the top light blue menu bar.

**Step 2**
- Enter your current Password.

**Step 3**
- Enter a new password and, Confirm New Password. New passwords require a minimum of 6 characters. At least one of the characters must be either a number or a special character from the following list: ~, !, @, #, $, %, ^, &, *, (,), -, _, =, +, {,}, [,,], <,>, or ? (for example, passw0rd or p@ssword).

**Step 4**
- Click the “Change Password” button.

**Step 5**
- Click the “Continue” button to access the Oakland Port Registry System Home page.
Alerts/Notifications Lessons

Please Select:

E  View System Messages
F  View Alerts/Notifications
Lesson E – View System Messages

**Step 1**
- After logging into the Oakland Port Registry System, view the System Messages on the Home page.

**Step 2**
- To export the system messages to Excel, click the Export to Excel link.

**Step 3**
- Select Open to view the System Messages in Excel or Select Save to save the System Messages in an Excel file.
Lesson F – View Alerts/Notifications

Step 1
• After logging into the Oakland Port Registry System, view the Alerts/Notifications section on the Home page.

Step 2
• To export the Alerts/Notifications to Excel, click the Export to Excel link.

Step 3
• Select Open to view the Alerts/Notifications in Excel or Select Save to save the Alerts/Notifications in an Excel file.
Lesson F – View Alerts/Notifications cont’d.

Step 1
• Select the View link for one of the Alerts/Notifications on the Home page.

Step 2
• If the alert is a “STEP Agreement to Expire” notification, when you have completed verifying your LMC information and registered trucks, check the “I certify that I have verified my LMC information and registered trucks and am ready to renew my STEP Agreement” checkbox.

Step 3
• View the Alert/Notification. If you’d like to flag the Alert for follow-up, select the Flag for Follow-Up checkbox.
Company Profile Lessons

Please Select:

- Update Company Profile
- Add/Edit Drivers
- Add/Edit Addresses
- Add/Edit Contacts
Lesson G – Update Company Profile

Step 1
• After logging into the Oakland Port Registry System, select the Company Profile link from the bottom menu bar.

Step 2
• Verify the information displayed on your Company Profile screen.

Step 3
• Update the DBA Name and Tax ID (if necessary) and select Update.

Step 4
• Select Update.

Step 5
• Contact the Port Customer Service Center at 866-332-7026 if information needs to be updated or corrected.
Lesson H – Manage Drivers - Edit

Step 1
• After logging into the Oakland Port Registry System, select the Company Profile link from the middle menu bar.

Step 2
• Click on the Drivers link.

Step 3
• Identify a driver from the list of drivers displayed.

Step 4
• Click on the Edit button.

Step 5
• Edit Drivers information page and click the Save button.
Lesson H – Manage Drivers - Add

Step 6
• After logging into the Oakland Port Registry System, select the Company Profile link from the middle menu bar.

Step 7
• Click on the Drivers link.

Step 8
• Click on the Add Driver button.

Step 9
• Enter Driver's License Number, Country, and State fields and click the Next button.

Step 10
• Enter driver information fields on the Drivers page and click the Save button.
Lesson I – Manage Addresses - Edit

Step 1
- After logging into the Oakland Port Registry System, select the Company Profile link from the middle menu bar.

Step 2
- Click on the Addresses link.

Step 3
- Identify an address from the list of Additional Addresses displayed.

Step 4
- Edit Additional Addresses information page and click the Save button.
Lesson I – Manage Addresses - Add

Step 5
• After logging into the Oakland Port Registry System, select the Company Profile link from the middle menu bar.

Step 6
• Click on the Addresses link.

Step 7
• Click on the Add Additional Address button.

Step 8
• Enter additional address information fields on the Addresses page and click the Save button.
Lesson J – Manage Contacts – Edit

Step 1
• After logging into the Oakland Port Registry System, select the Company Profile link from the middle menu bar.

Step 2
• Click on the Contacts link.

Step 3
• Identify a contact from the list of Additional Contacts displayed.

Step 4
• Click on the Edit button.

Step 5
• Edit Additional Contacts information page and click the Save button.
Lesson J – Manage Contacts - Add

Step 6 • After logging into the Oakland Port Registry System, select the Company Profile link from the middle menu bar.

Step 7 • Click on the Contacts link.

Step 8 • Click on the Add Additional Contacts button.

Step 9 • Enter additional contact information fields on the Contacts page and click the Save button.
Manage Trucks Lessons

Please Select:

- Truck Search
- View/Edit Trucks
- Edit Truck Owner Info
- Un-Register Trucks
- Add Trucks
Lesson K – Truck Search

**Step 1**
- After logging into the Oakland Port Registry System, select the Trucks link from the middle menu bar.

**Step 2**
- Search for a truck in your fleet by entering Plate, Label, and/or STEP Decal #.

**Step 3**
- Select the Search button.

**Step 4**
- View the Truck Search Results.
Lesson L – Manage Trucks - View

Step 1

• After logging into the Oakland Port Registry System, select the Trucks link from the middle menu bar.
• Note: The Trucks page displays all trucks associated to the LMC.

Step 2

• Identify a truck from the list of trucks displayed, or refine your search by entering as much information that is known in the search fields listed; Plate, Label, and/or STEP Decal #.

Step 3

• Once a truck has been identified, click on the View link.

Step 4

• Review the Truck Registry screen.
Step 5 • After logging into the Oakland Port Registry System, select the Trucks link from the middle menu bar. Note: The Trucks page displays all trucks associated to the LMC.

Step 6 • Identify a truck from the list of trucks displayed, or refine your search by entering as much information that is known in the search fields listed; Plate, Label, and/or STEP Decal #.

Step 7 • Once a truck has been identified, click on the Edit link.

Step 8 • Edit available fields on the Truck information page and Click the Update button.
**Lesson M – Edit Truck Owner Info**

**Step 1**
- After logging into the Oakland Port Registry System, select the Trucks link from the middle menu bar. Note: The Trucks page displays all trucks associated to the LMC.

**Step 2**
- Identify a truck from the list of trucks displayed, or refine your search by entering as much information that is known in the search fields listed; Plate, Plate, and/or STEP Decal #.

**Step 3**
- Once a truck has been identified, click on the Edit link.

**Step 4**
- Click on the Owner link.
Lesson M – Edit Truck Owner Info cont’d.

To edit Truck Owner information select from one of the following options:
1. Edit Registered Owner Information and click the Update button.
2. Click the Change Owner button
   a) Select LMC is Owner radio button and Click Update.
   b) Select Use Owner from Your Existing Trucks radio button and Click Update.
   c) Select Enter New radio button, enter Registered Owner Information, and Click Update.
Lesson N – Un-Register Trucks

Step 1
• After logging into the Oakland Port Registry System, select the Trucks link from the middle menu bar. Note: The Trucks page displays all trucks associated to the LMC.

Step 2
• Identify a truck from the list of trucks displayed, or refine your search by entering as much information that is known in the search fields listed; Plate, Plate, and/or STEP Decal #.

Step 3
• Once a truck has been identified, click the (check) checkbox to the left of the identified truck.

Step 4
• Click on the Un-Registered button.

Step 5
• Select one of the following options: Click the Yes, Remove Trucks button or Click the No, Keep the Trucks button.
Lesson O – Add Trucks

Step 1
• After logging into the Oakland Port Registry System, select the Trucks link from the middle menu bar.

Step 2
• Click on the Add Truck button.

Step 3
• Enter and confirm valid VIN and Click the Next button.

Step 4
• Follow steps to complete VIN validation and add the Truck.
Lesson O – Add Trucks cont’d.

**Step 1**
- Complete the Truck Information form. Editable fields are License Plate, State of Issuance, Country, Label, and Fuel Type.

**Step 2**
- Click on the Next button.

**Step 3**
- Select the Owner Type.

**Step 4**
- Click on the Finish button.
Manage Users Lessons

Please Select:

- Add User
- View/Edit User
Lesson P – Add User

Step 1
• After logging into the Oakland Port Registry System, select the Users link from the middle menu bar.

Step 2
• Click on the Add User button.

Step 3
• Enter field on the User Information page. NOTE: In order for the User to be active, make sure to (check) the Is Active? Checkbox.

Step 4
• Click the Create button.
Lesson Q – View/Edit User

Step 1 • After logging into the Oakland Port Registry System, select the Users link from the middle menu bar.

Step 2 • Identify a user from the list of Users displayed.

Step 3 • Once a user has been identified, click on the Edit link.

Step 4 • Edit available fields on the User information page and Click the Update button.

Next Group
Upload Driver and Truck Data

Please Select:

- [R] Download Templates
- [S] Upload File
Lesson R – Download Templates

Step 1
• After logging into the Oakland Port Registry System, select the Upload link from the middle menu bar.

Step 2
• Click on the Driver Template link or Trucks Template link.

Step 3
• Click on the Save button or Open button.

Step 4
• Enter driver (or drivers) information in the Excel document and Click on the Validate Data button. NOTE: Please correct any False data that has been created before you upload the file.
Lesson R – Download Templates

Driver Template:

This file upload is for drivers that are not already in your driver list. New Drivers only.

Instructions/Rules:
- Enter data starting at row 5 only.
- Fields denoted with an asterisk * are required.
- When you have finished entering data click the Validate button on the top right of this sheet. If a driver validates to true it is more likely that it will be successfully imported into the Port Registry.
- You will need to enable macros in order for the Validate button to work. To enable macros in Excel 2007, you are given a Security Warning and can click on Options. Click on Options and then select Enable Content. To enable macros in Excel 2003 or older click on the Tools Menu, Select the Macros sub-menu, then select Security, a window pops up, you can select Medium which means you will be prompted to enable or disable macros when you open spreadsheets. You can then reopen this spreadsheet and enable macros for this file.

Note: The driver license expiration date must not have passed. If a driver already exists in the system, the driver will be added to your driver list but none of the information you provide will be used. You must edit the driver to make any corrections.

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Click to Continue
Lesson R – Download Templates

Truck Template:

| A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V |
| 1 | Truck Upload | | | | | | | | | | | | | | | | | | | | |
| 2 | Instructions/Rules: | | | | | | | | | | | | | | | | | | | | |
| 3 | Enter data starting at row 5 only. | | | | | | | | | | | | | | | | | | | | |
| 4 | Fields denoted with an asterisk * are required. The only exception is if the Owner Type is LMC, none of the other Owner Fields are required. | | | | | | | | | | | | | | | | | | | | |
| 5 | When you have finished entering data, click the Validate button on the top right of this sheet. If a truck validates as true, it is more likely that it will be successfully imported into the Port Registry. | | | | | | | | | | | | | | | | | | | | |
| 6 | You will need to enable macros in order for the Validate button to work. To enable macros in Excel 2007, you are given a Security Warning and can click on Options. Click on Options and then select Enable Content. To enable macros in Excel 2010 or older, click on the Tools menu, select the Macros sub-menu, then select Security. A window pops up; you can select Medium which means you will be prompted to enable or disable macros when you open spreadsheets. You can then reopen this spreadsheet and enable macros for this file. | | | | | | | | | | | | | | | | | | | | |
| 7 | Notes: If a truck does not pass validation, the record will fail and if a truck already exists in the system, the truck will be added to your fleet but none of the information you provide will be used. You must edit the truck to make any corrections. | | | | | | | | | | | | | | | | | | | | |

**Truck Information**

| VIN* | UC Plate Number* | UC Plate Country* | UC Plate State* | Truck Label | Fuel Type* | Owner Type* | Company Name | First Name | Last Name | Address 1* | Address 2 | City* | County* | State* | Zip* | Phone Numbers/Extension | Fax Number | Email | Data Valid |
|------|------------------|------------------|-----------------|-------------|-----------|-------------|--------------|------------|----------|----------|-----------|-----------|-------|--------|-------|-----|-------------------------|-----------|-------|----------|
|      |                  |                  |                 |             |           |             |              |            |          |           |           |        |        |        |     |                          |           |       |           |
Lesson S – Upload File

Step 1
- After logging into the Oakland Port Registry System, select the Upload link from the middle menu bar.

Step 2
- Select File Type from drop-list: Truck or Driver

Step 3
- Click on the Browse button and select the associated file saved to your PC.

Step 4
- Click the Upload File button.

Step 5
- Validate imported Trucks/Drivers
View Reports

Please Select:

View a Report
Lesson T – View a Report

Step 1
• After logging into the Oakland Port Registry System, select the Reports link from the middle menu bar.

Step 2
• Review list of available LMC Reports display. Select one of the following options: Trucks with Exceptions or Incomplete Data or Fleet Summary Report

Step 3
• Sort by Label, License Plate, or Model Year (Fleet Summary only)

Step 4
• Select from following radio button options: Screen, Excel or PDF.

Step 5
• Click the Run Report button.