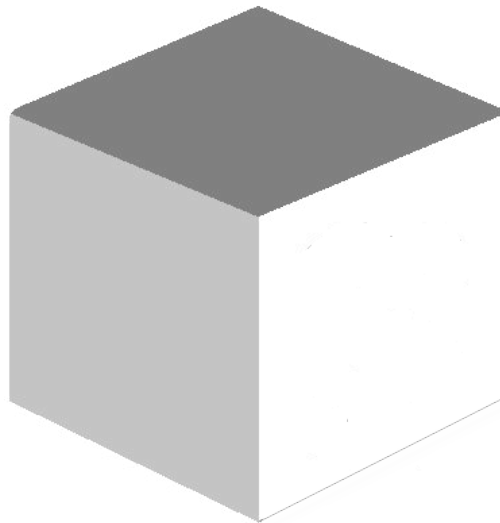


ShipExec Validation List User Guide



July 22, 2020

Version 2.1

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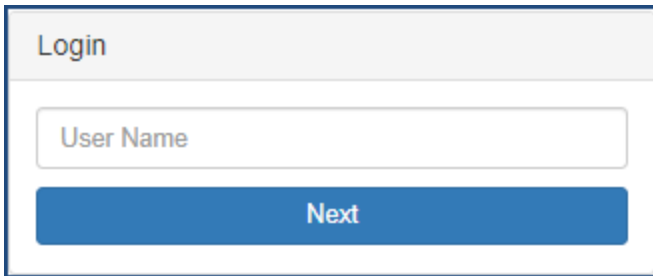
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Introduction

The *ShipExec Validation List User Guide* is intended for system, enterprise, and company administrators. You must have a role other than *user* to access the site. This guide describes a basic Validation List configuration. If you need in-depth configuration, refer to your *ShipExec Management Studio User Guide*.

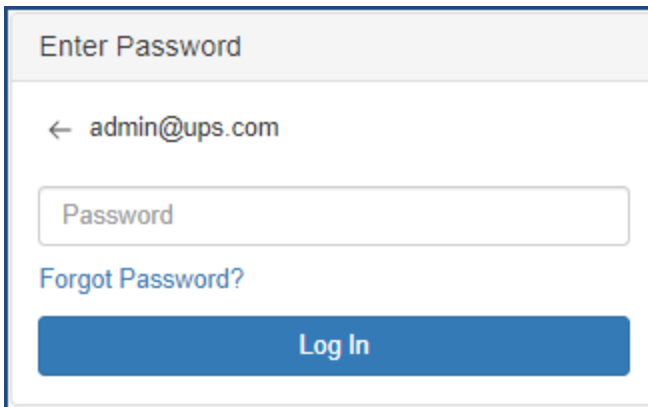
Logging on to Management Studio

1. Click the ShipExec Management Studio URL link sent to you by your company administrator. The Management Studio Login page displays.



The screenshot shows a login form with a header 'Login'. Below the header is a text input field with the placeholder text 'User Name'. Below the input field is a blue button with the text 'Next'.

2. Type your email ID in the **Email ID** box.
3. Click **Next**.






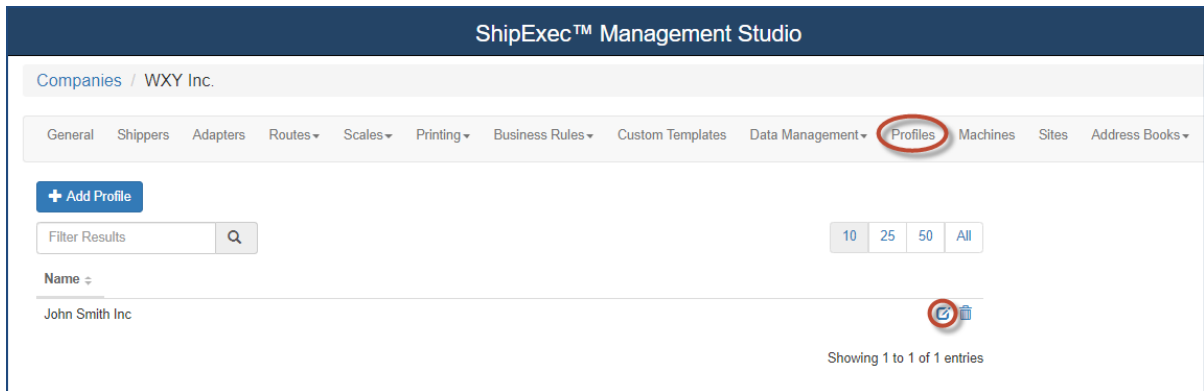
The screenshot shows a password entry form with a header 'Enter Password'. Below the header is a text input field containing 'admin@ups.com' with a back arrow icon to its left. Below the input field is a text input field labeled 'Password'. Below the 'Password' field is a link 'Forgot Password?'. At the bottom is a blue button labeled 'Log In'.


4. Type your password in the **Password** box.
5. Click **Log In**.

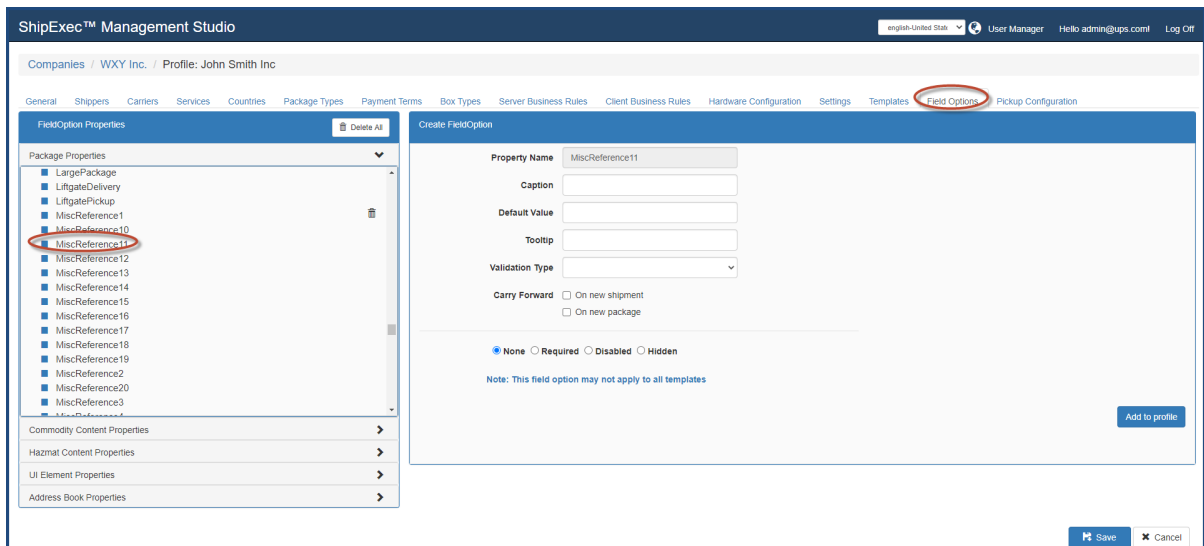
Adding Validation List Field Options

This topic describes how to add validation list field options to a company or a site. Field options allow you to set properties on shipping fields within the *ShipExec Thin Client*.

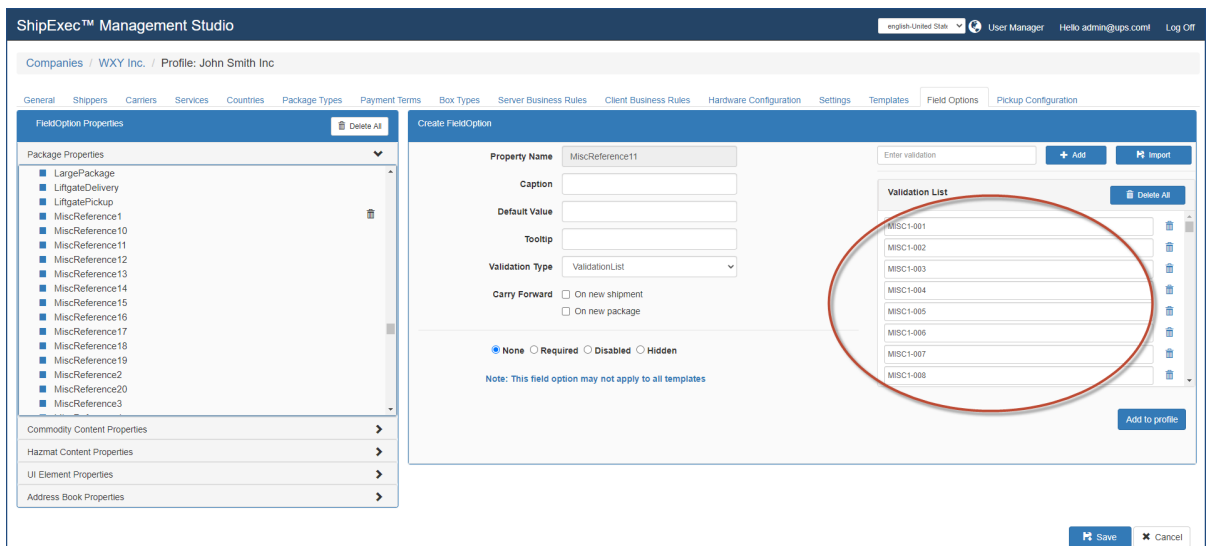
1. On the ShipExec Management Studio home page, click **Companies**.
2. From the Companies page, do *one* of the following:
 - To add validation list field options at the company level, click the  icon for the company for which you want to add field options.
 - To add validation list field options at the site level, click the  icon for the company, then click the **Sites** tab, and then click the  icon for the site for which you want to add field options.
3. Click the **Profiles** tab. The Profiles page displays.




4. Click the  icon for the profile to which you want to add field options.
5. Click the **Field Options** tab. The Field Options page displays. (**Note:** This illustration uses the *Package Properties*).






6. Click **Package Properties** to expand the list.
7. In the **Package Properties** panel, click any available MiscReference package you want to configure. (**Note:** *This illustration uses MiscReference11 as an example.*)
8. In the **Caption** box, type the new property name label.
9. In the **Default Value** box, type the field option default value.
10. In the **Tooltip** box, type the tip you want to display when someone hovers over the field.
11. From the **Validation Type** drop-down list, select the validation type you want:
 - **ValidationList** - Provides an option for users to type their own validation list.
 - **ValidationListDropDown** - Provides users with a drop-down of different options.
11. Select the appropriate **Carry Forward** check box:
 - **On new shipment** - Management Studio will use whatever default value you have at ship time.
 - **On new package** - Management Studio will use whatever value you have on the package you are working with.
12. Select the appropriate option button (Required, Disabled, Hidden). If you want the field option to be mandatory in the *Thin Client*, be sure to select the **Required** option.
13. Do *one* of the following:
 - Enter a value in the **Enter Validation** box and click the **Add** button to manually create a Validation List.
 - Click the **Import** button to import a Validation List.
 - Click **Choose File** to navigate to your file location and click **Open**.
 - Click **OK** on the File Upload Status message box, then click **Save**.
 - Click **Yes** to confirm importing the Validation List.

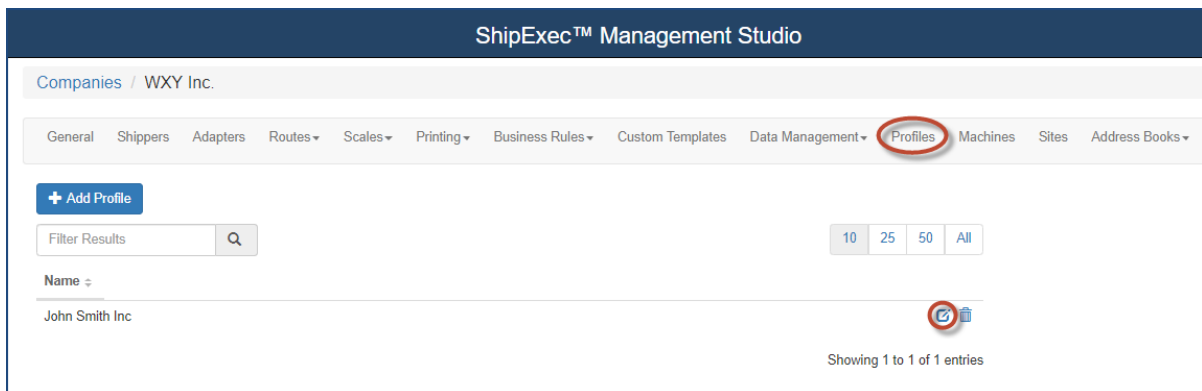



14. Click **Add to Profile**. The "*Successfully added to profile*" message displays at the bottom of the page.
15. Click **Save**. Management Studio adds a  icon next to the field option. The field option you have added will now show up in the Data Configuration Mapping when you try to schedule an update of this Validation List.

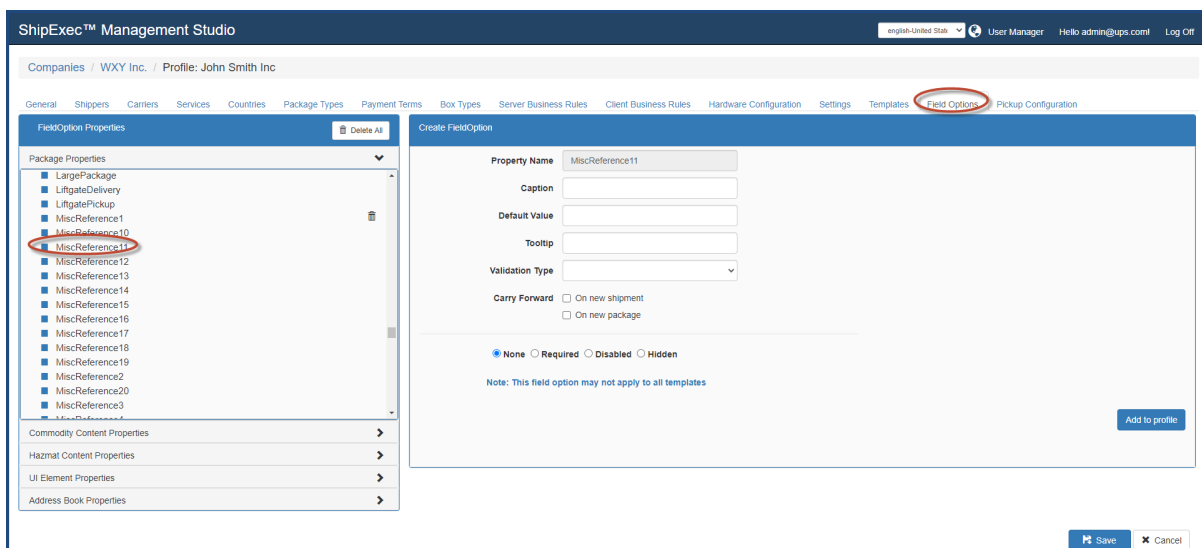
Modifying Validation List Field Options

This topic describes how modify Validation List field options for a company or a site.

1. On the ShipExec Management Studio home page, click **Companies**.
2. From the Companies page, do *one* of the following:
 - To modify Validation List field options at the company level, click the  icon for the company for which you want to modify Validation List field options.
 - To modify Validation List field options at the site level, click the  icon for the company, then click the **Sites** tab, and then click the  icon for the site for which you want to modify Validation List field options.
3. Click the **Profiles** tab. The Profiles page displays.



4. Click the  icon for the profile for which you want to modify Validation List field options. The Field Options page displays. (**Note:** This illustration uses the Package Properties as an example).






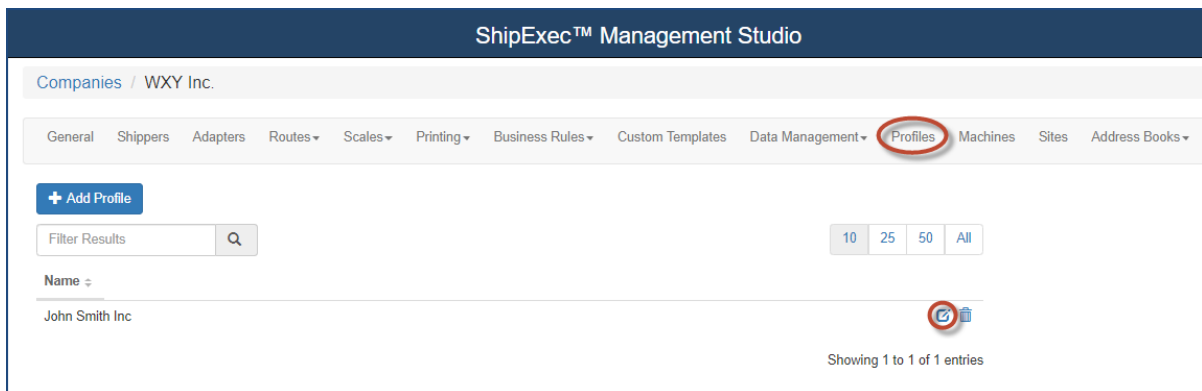
5. In the **Package Properties** panel, click the package you want to modify. (**Note:** This illustration uses *MiscReference* as an example.)


6. Modify the Validation List field options, then click **Update**
7. Click **Save**.

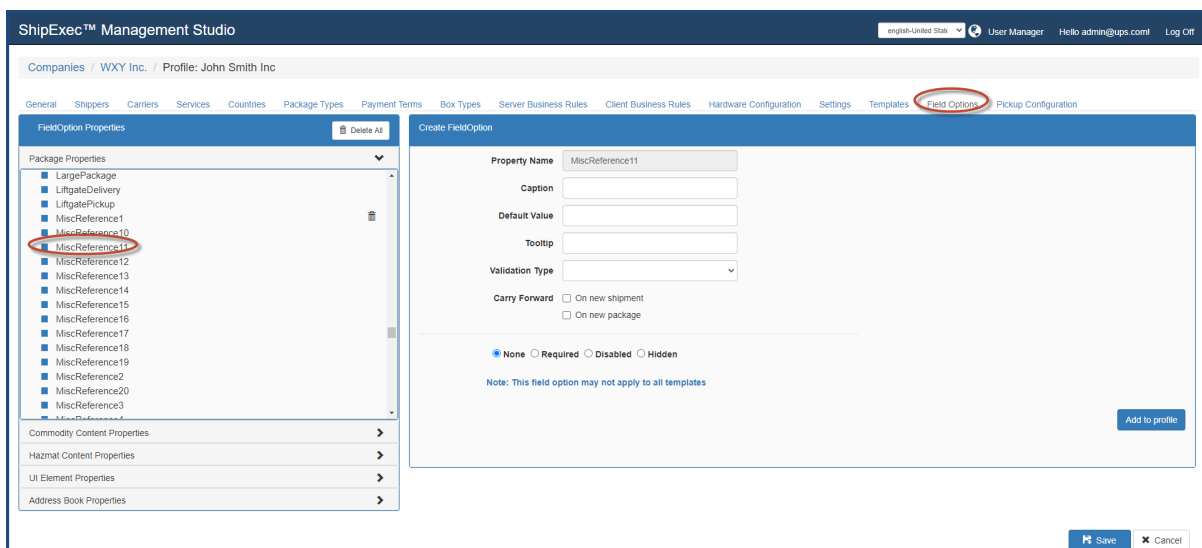
Removing Validation List Field Options


This topic describes how to remove Validation List field options from a company or a site.

1. On the ShipExec Management Studio home page, click **Companies**.
2. From the Companies page, do *one* of the following:
 - To remove Validation List field options at the company level, click the  icon for the company for which you want to remove Validation List field options.
 - To remove Validation List field options at the site level, click the  icon for the company, then click the **Sites** tab, and then click the  icon for the site for which you want to remove Validation List field options.
3. Click the **Profiles** tab. The Profiles page displays.



4. Click the  icon for the profile for which you want to remove Validation List field options. The Field Options page displays. (**Note:** This illustration uses the Package Properties as an example.)






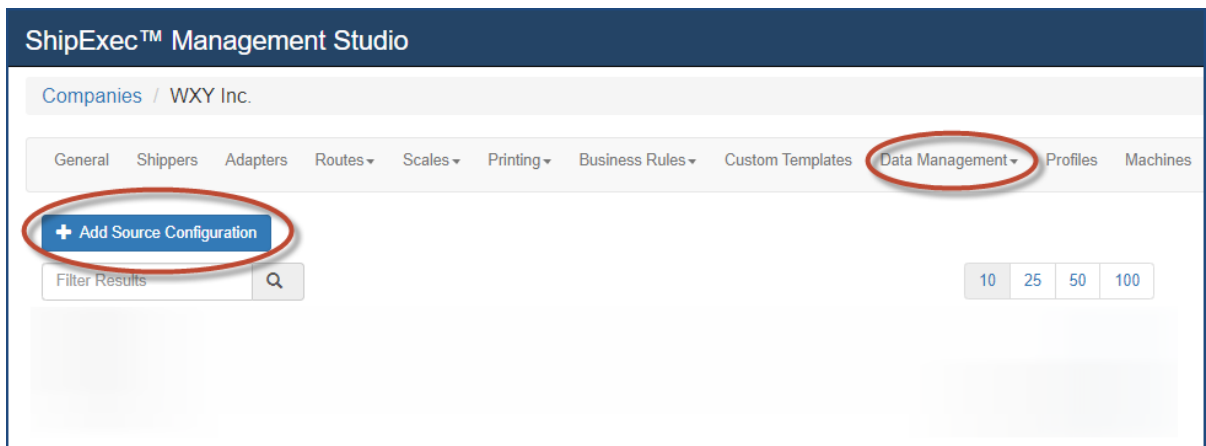
5. In the **Package Properties** panel, click the  icon next to the package whose Validation List field options you want to remove. (**Note:** This illustration uses MiscReference as an example.)
6. Click **OK** to confirm.

7. Click **Update**.
8. Click **Save**.

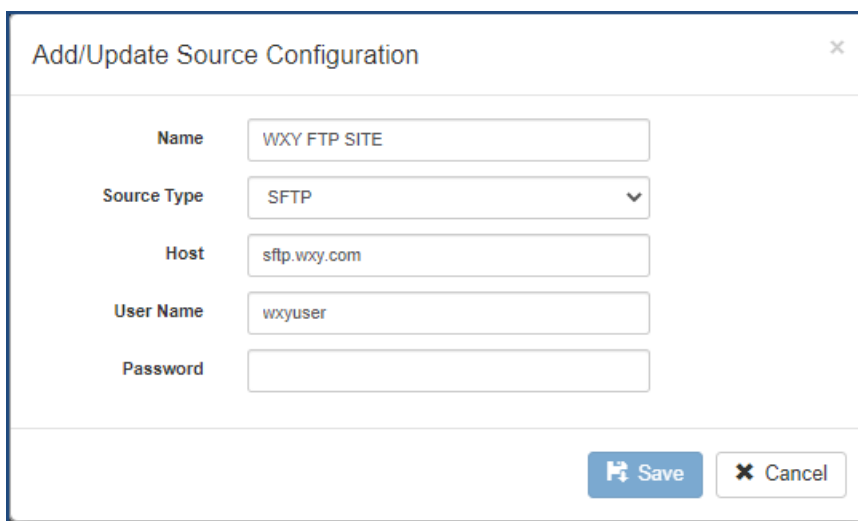
Adding Data Source Configuration

This topic describes how to add data source configuration to a company. Data source configuration lets you set up a location to export or import ShipExec data.

1. On the ShipExec Management Studio home page, click **Companies**.
2. From the Companies page, do *one* of the following:
 - To add data source configuration at the company level, click the  icon for the company for which you want to add data source configuration.
 - To add data source configuration at the site level, click the  icon for the company, then click the **Sites** tab, and then click the  icon for the site for which you want to add data source configuration.
3. Click the **Data Management** tab and select **Data Source Configuration**. The Add Source Configuration page displays.



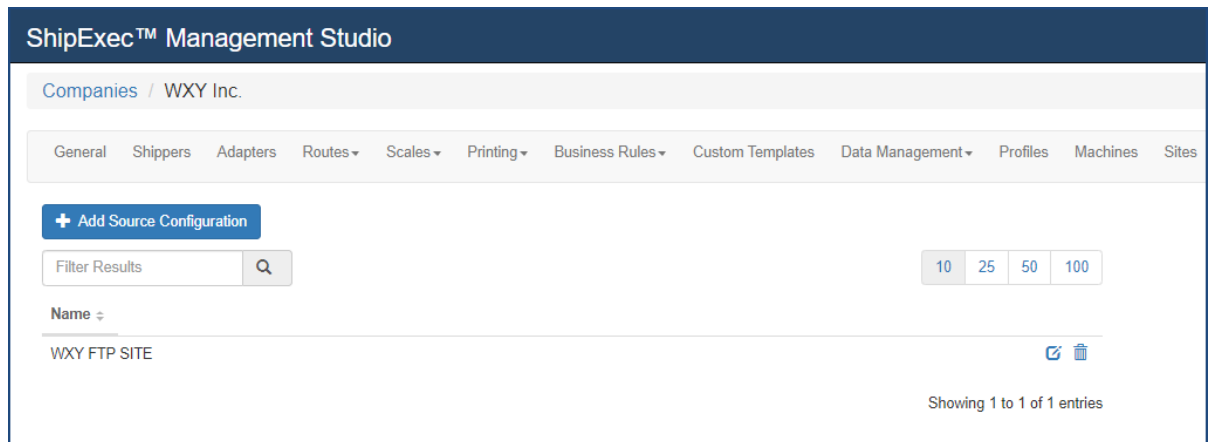
4. Click **Add Source Configuration**. The Add/Update Data Source Configuration dialog box displays.

A screenshot of the "Add/Update Source Configuration" dialog box. The dialog has a title bar with the text "Add/Update Source Configuration" and a close button (X). The main area contains several input fields:

- Name:** WXY FTP SITE
- Source Type:** SFTP (dropdown menu)
- Host:** sftp.wxy.com
- User Name:** wxyuser
- Password:** (empty text box)




At the bottom right of the dialog, there are two buttons: a blue "Save" button and a white "Cancel" button with a red X icon.

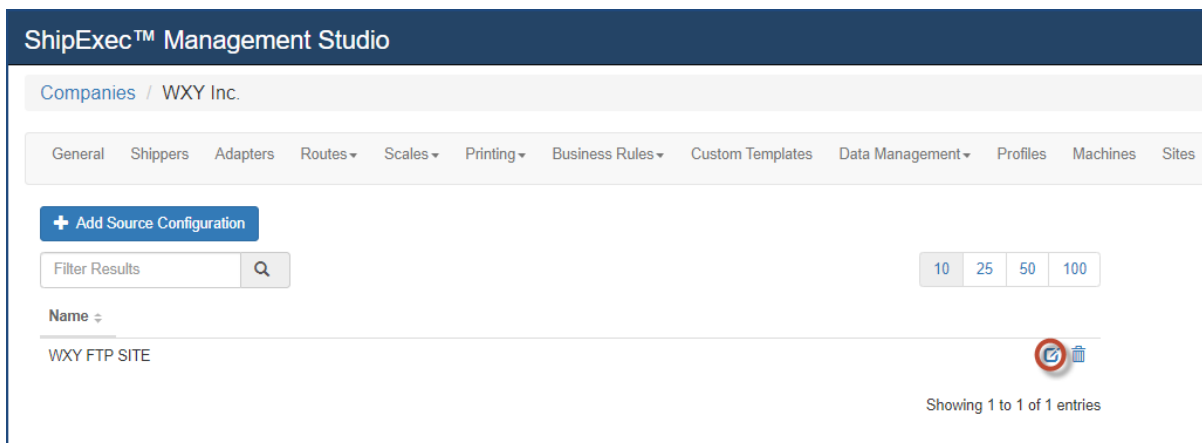
5. Type the source configuration name in the **Name** box.
6. Select your source type from the **Source Type** drop-down list.
7. Type the host name in the **Host** box.
8. Type the user name in the **User Name** box.
9. Type the password in the **Password** box.
10. Click **Save**. The Data Source Configuration page displays.




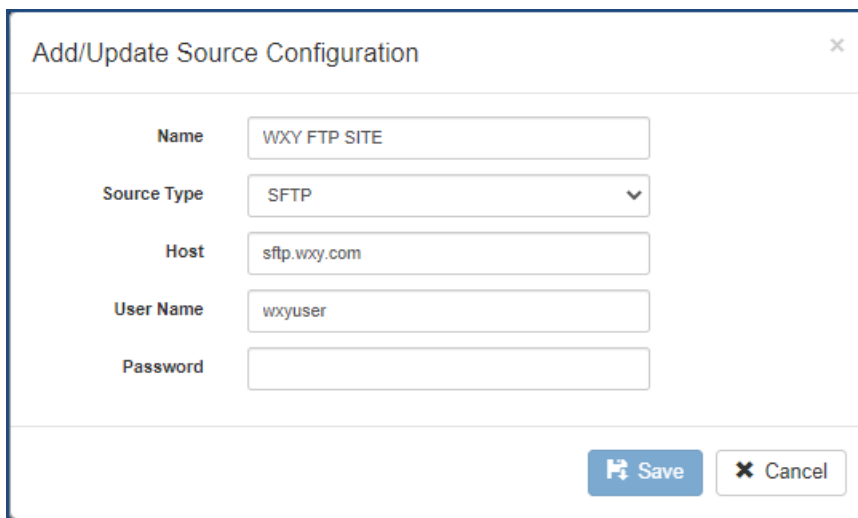
Modifying Data Source Configuration

This topic describes how to modify data source configuration.

1. On the ShipExec Management Studio home page, click **Companies**.
2. From the Companies page, do *one* of the following:
 - To modify data source configuration at the company level, click the  icon for the company for which you want to modify data source configuration.
 - To modify data source configuration at the site level, click the  icon for the company, then click the **Sites** tab, and then click the  icon for the site for which you want to modify data source configuration.
3. Click the **Data Management** tab and select **Data Source Configuration**. The Data Source Configuration page displays.



4. Click the  icon for the data source configuration you want to modify. The Add/Update Source Configuration dialog box displays.



The screenshot shows a dialog box titled "Add/Update Source Configuration" with a close button (X) in the top right corner. The dialog contains several fields:




- Name:** WXY FTP SITE
- Source Type:** SFTP (with a dropdown arrow)
- Host:** sftp.wxy.com
- User Name:** wxyuser
- Password:** (empty field)

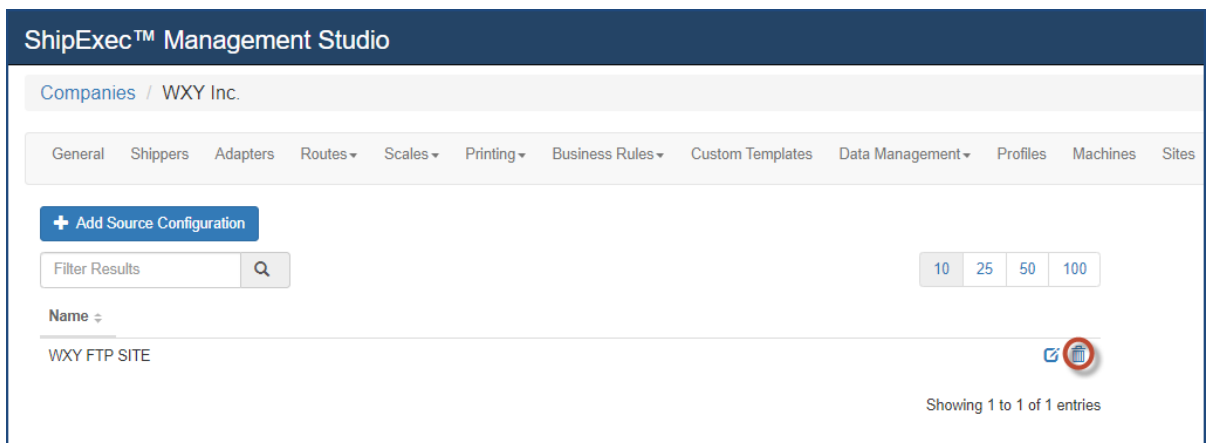
At the bottom right of the dialog, there are two buttons: a blue "Save" button with a floppy disk icon and a white "Cancel" button with an X icon.


5. Modify the data source configuration as needed, then click **Save**.

Removing Data Source Configuration

This topic describes how to remove data source configuration.




1. On the ShipExec Management Studio home page, click **Companies**.
2. From the Companies page, do *one* of the following:
 - To remove data source configuration at the company level, click the  icon for the company for which you want to remove data source configuration.
 - To remove data source configuration at the site level, click the  icon for the company, then click the **Sites** tab, and then click the  icon for the site for which you want to remove data source configuration.
3. Click the **Data Management** tab and select **Data Source Configuration**. The Data Source Configuration page displays.

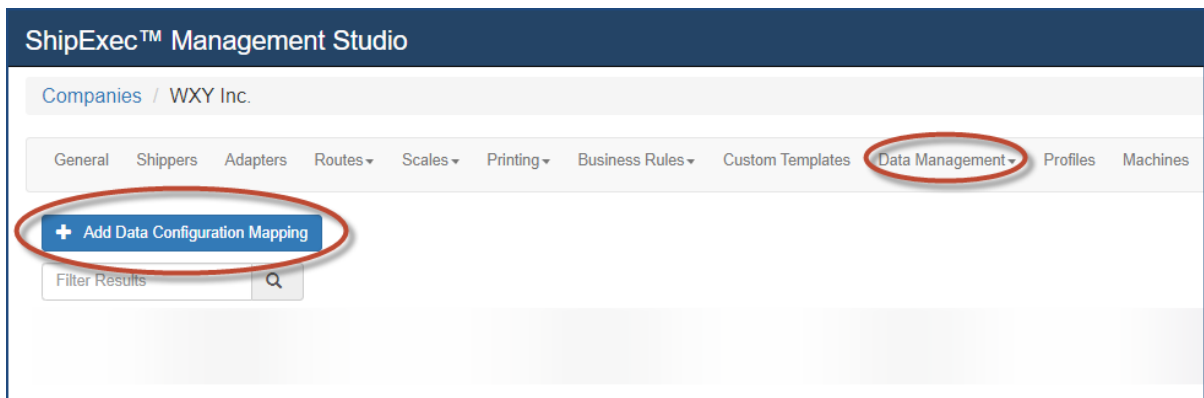


4. Click the  icon for the data source configuration you want to remove.
5. Click **OK** to confirm.

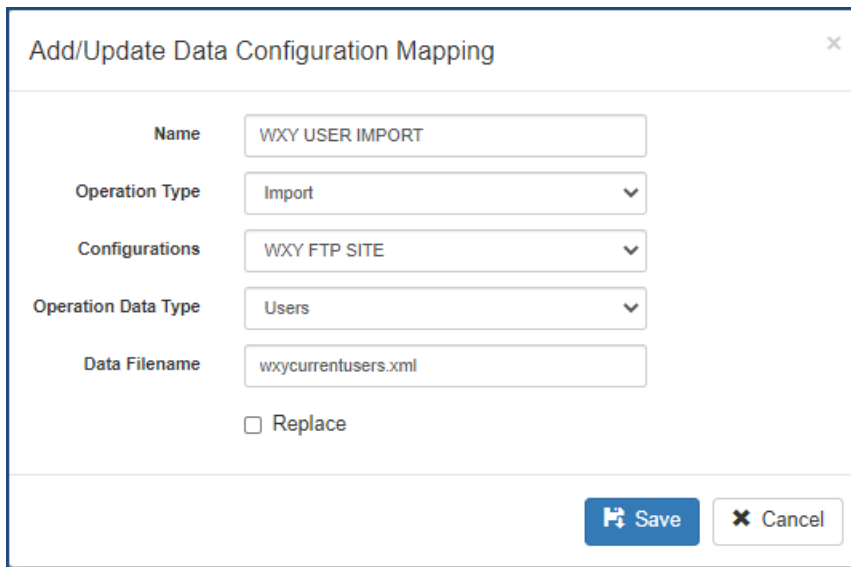
Adding Data Configuration Mapping

This topic describes how to add data configuration mapping to a company. Data configuration mapping lets you set the action to be performed for a scheduled event.

1. On the ShipExec Management Studio home page, click **Companies**.
2. From the Companies page, do *one* of the following:
 - To add data configuration mapping at the company level, click the  icon for the company for which you want to add data configuration mapping.
 - To add data configuration mapping at the site level, click the  icon for the company, then click the **Sites** tab, and then click the  icon for the site for which you want to add data configuration mapping.
3. Click the **Data Management** tab and select **Data Configuration Mapping**. The Add Data Configuration Mapping page displays.



4. Click **Add Data Configuration Mapping**. The Add/Update Data Configuration Mapping dialog box displays.



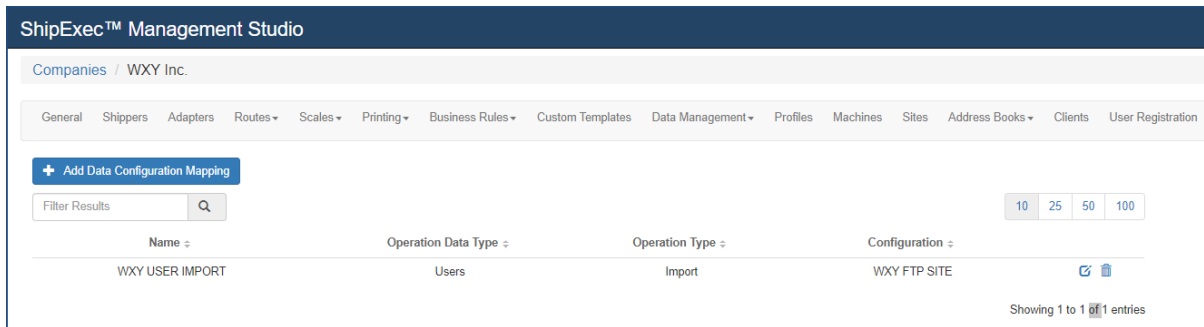
The dialog box is titled 'Add/Update Data Configuration Mapping' and contains the following fields and options:

Name	WXY USER IMPORT
Operation Type	Import
Configurations	WXY FTP SITE
Operation Data Type	Users
Data Filename	wxycurrentusers.xml

Replace




Buttons: Save, Cancel

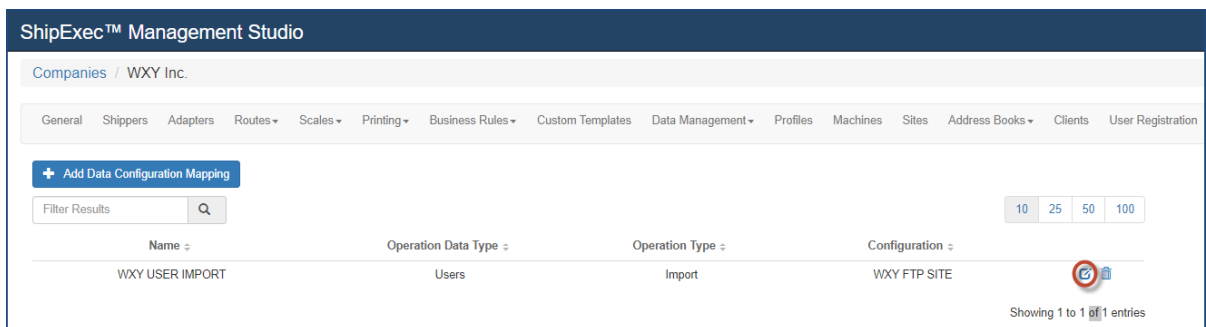
5. Type the data configuration mapping name in the **Name** box.
6. Select your operation type from the **Operation Type** drop-down list.
7. From the Data Source **Configurations** drop-down list, select the external data location where you are either importing or exporting the data.
8. From the **Operation Data Type** drop-down list, select the data type that you want to import or export. **Note:** *You can use a text file to import a single Validation List. Use a CSV if you want to import multiple Validation Lists for multiple fields at the same time.*
9. Type the data file name in the **Data Filename** box.
10. Do *one* of the following:
 - If you select the **Replace** check box, ShipExec will replace the existing Validation List with a new Validation List.
 - If you leave the **Replace** check box unselected, ShipExec will leave the existing Validation List intact and will only add the validations that do not exist in the import file.
11. Click **Save**. The Data Configuration Mapping page displays.




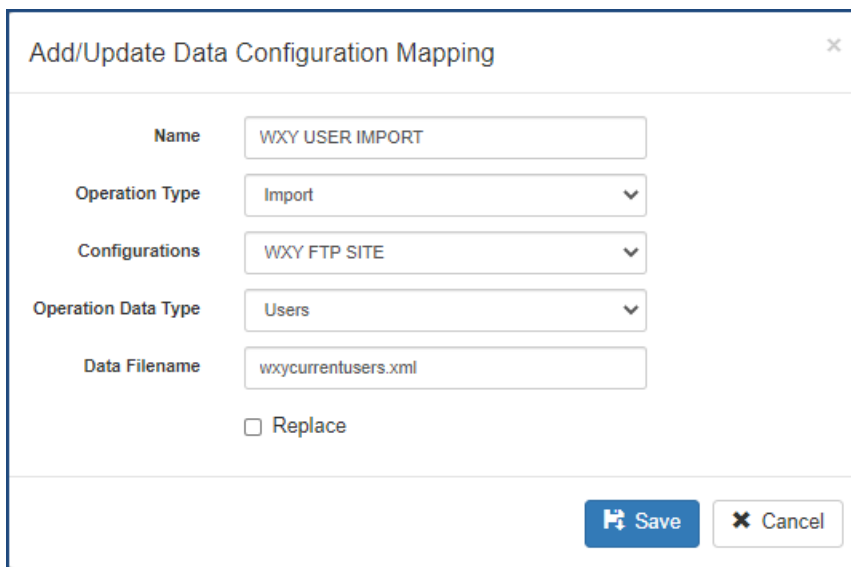
Modifying Data Configuration Mapping

This topic describes how to modify data configuration mapping.

1. On the ShipExec Management Studio home page, click **Companies**.
2. From the Companies page, do *one* of the following:
 - To modify data configuration mapping at the company level, click the  icon for the company for which you want to modify data configuration mapping.
 - To modify data configuration mapping at the site level, click the  icon for the company, then click the **Sites** tab, and then click the  icon for the site for which you want to modify data configuration mapping.
3. Click the **Data Management** tab and select **Data Configuration Mapping**. The Data Configuration Mapping page displays.



4. Click the  icon for the data configuration mapping you want to modify. The Add/Update Data Configuration Mapping dialog box displays.



The dialog box is titled 'Add/Update Data Configuration Mapping'. It contains the following fields:




- Name:** WXY USER IMPORT
- Operation Type:** Import
- Configurations:** WXY FTP SITE
- Operation Data Type:** Users
- Data Filename:** wxycurrentusers.xml

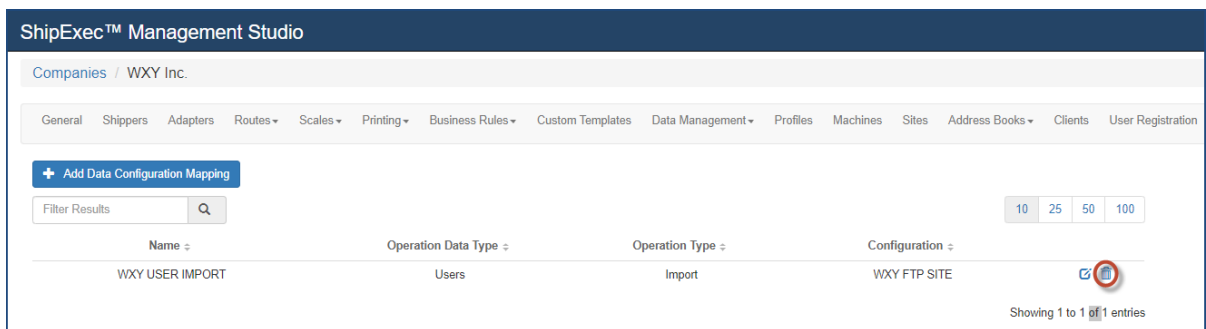
There is an unchecked checkbox labeled 'Replace' and two buttons at the bottom: 'Save' and 'Cancel'.


5. Modify the data configuration mapping as needed, then click **Save**.

Removing Data Configuration Mapping

This topic describes how to remove data configuration mapping.




1. On the ShipExec Management Studio home page, click **Companies**.
2. From the Companies page, do *one* of the following:
 - To remove data configuration mapping at the company level, click the  icon for the company for which you want to remove data configuration mapping.
 - To remove data configuration mapping at the site level, click the  icon for the company, then click the **Sites** tab, and then click the  icon for the site for which you want to remove data configuration mapping.
3. Click the **Data Management** tab and select **Data Configuration Mapping**. The Data Configuration Mapping page displays.

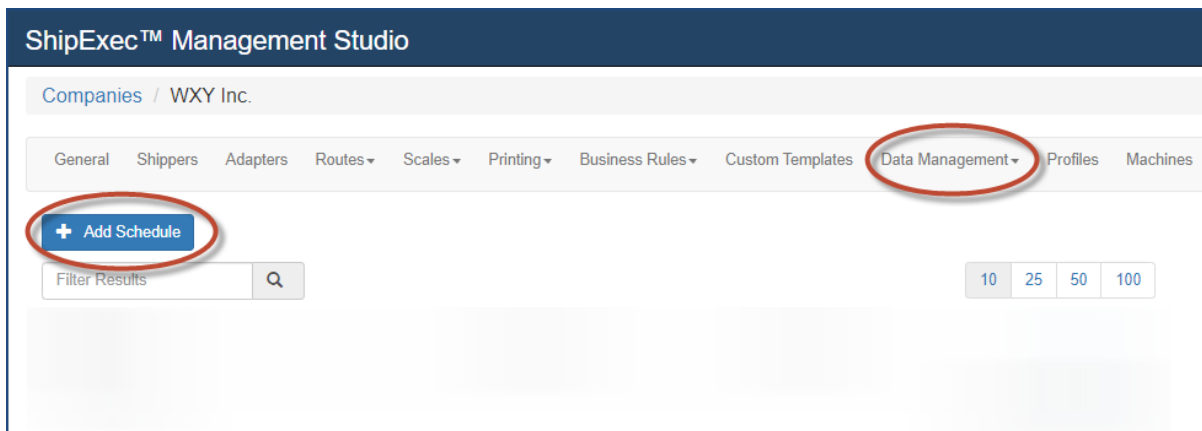


4. Click the  icon for the data configuration mapping you want to remove.
5. Click **OK** to confirm.

Adding Mapping Schedule

This topic describes how to add a mapping schedule to a company. A mapping schedule lets you set when you want the data import or export to happen.

1. On the ShipExec Management Studio home page, click **Companies**.
2. From the Companies page, do *one* of the following:
 - To add a mapping schedule at the company level, click the  icon for the company for which you want to add a mapping schedule.
 - To add a mapping schedule at the site level, click the  icon for the company, then click the **Sites** tab, and then click the  icon for the site for which you want to add a mapping schedule.
3. Click the **Data Management** tab and select **Mapping Schedule**. The Add Schedule page displays.



4. Click **Add Schedule**. The Add/Update Schedule dialog box displays.

Add/Update Schedule
✕

Name

Data Configuration Mapping

Start Time

⬆ ⬆

:

⬇ ⬇

Time Zone

Repeat Type

Daily
 Weekly
 Monthly

Sunday
 Monday
 Tuesday

Wednesday
 Thursday
 Friday

Saturday

Time Out

Enable

5. Type the schedule name in the **Name** box.
6. From the **Data Configuration Mapping** drop-down list, select the data configuration mapping you want.
7. Enter the mapping schedule starting time in the **Start Time** boxes.
8. Select the appropriate time zone from the **Time Zone** drop-down list.
9. Use the **Repeat Type** option buttons and check boxes to select the mapping schedule frequency.
10. Enter the timeout minutes in the **Time Out** box.
11. Do *one* of the following:
 - Select the **Enable** check box if you want to enable the mapping schedule.
 - Do not select the **Enable** check box if you do not want the mapping schedule to run.
12. Click **Save**. The Mapping Schedule page displays.

ShipExec™ Management Studio



Companies / WXY Inc.

General Shippers Adapters Routes Scales Printing Business Rules Custom Templates Data Management Profiles Machines

+ Add Schedule

Filter Results




10 25 50 100

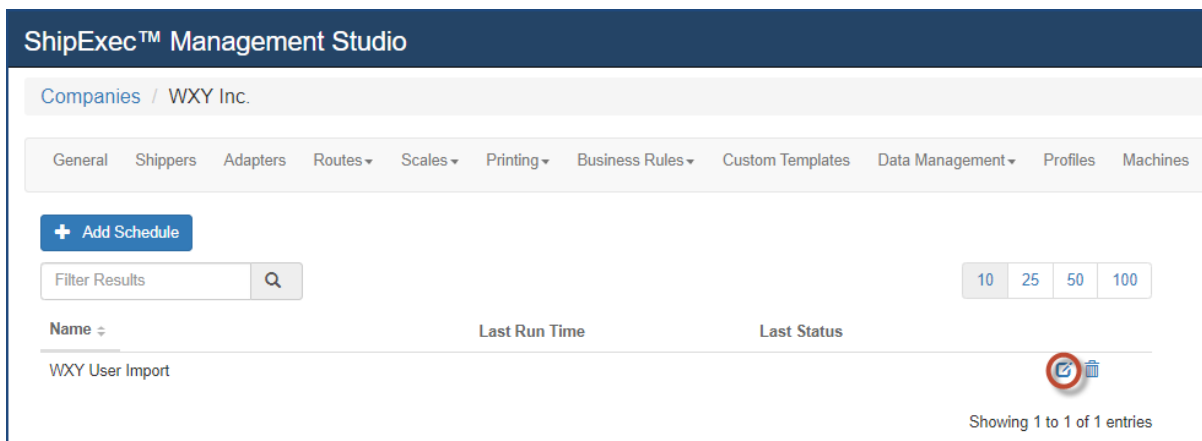
Name	Last Run Time	Last Status
WXY User Import		 


Showing 1 to 1 of 1 entries

Modifying Mapping Schedule

This topic describes how to modify a mapping schedule.

1. On the ShipExec Management Studio home page, click **Companies**.
2. From the Companies page, do *one* of the following:
 - To modify a mapping schedule at the company level, click the  icon for the company for which you want to modify a mapping schedule.
 - To modify a mapping schedule at the site level, click the  icon for the company, then click the **Sites** tab, and then click the  icon for the site for which you want to modify a mapping schedule.
3. Click the **Data Management** tab and select **Mapping Schedule**. The Mapping Schedule page displays.



4. Click the  icon for the mapping schedule you want to modify. The Add/Update Mapping Schedule dialog box displays.

Add/Update Schedule ×

Name

Data Configuration Mapping

Start Time :

Time Zone

Repeat Type Daily Weekly Monthly

Sunday Monday Tuesday
 Wednesday Thursday Friday
 Saturday




Time Out

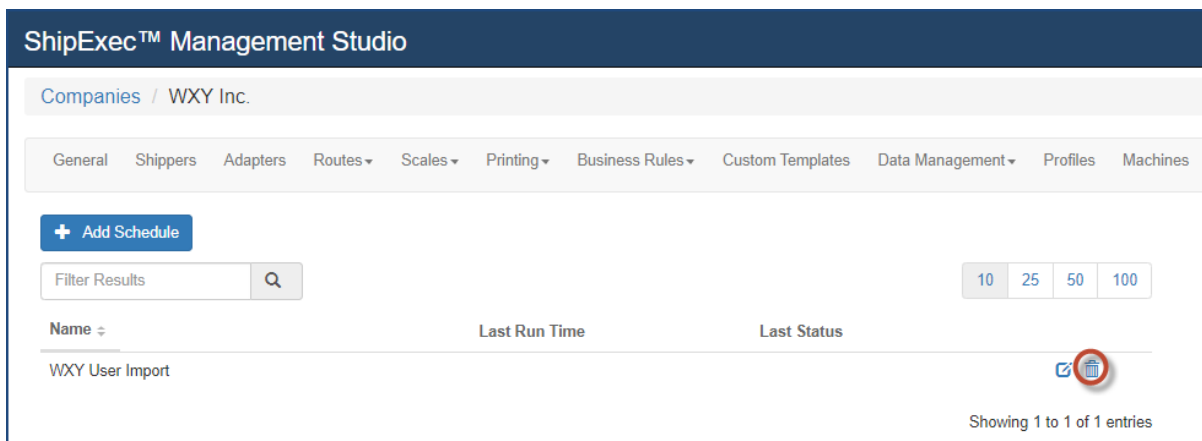
Enable


5. Modify the mapping schedule as needed, then click **Save**.

Removing Mapping Schedule

This topic describes how to remove a mapping schedule.

1. On the ShipExec Management Studio home page, click **Companies**.
2. From the Companies page, do *one* of the following:
 - To remove a mapping schedule at the company level, click the  icon for the company for which you want to remove a mapping schedule.
 - To remove a mapping schedule at the site level, click the  icon for the company, then click the **Sites** tab, and then click the  icon for the site for which you want to remove a mapping schedule.
3. Click the **Data Management** tab and select **Mapping Schedule**. The Mapping Schedule page displays.



4. Click the  icon for the mapping schedule you want to remove.
5. Click **OK** to confirm.