

Administration Guide for: Quantum ViewSM Manage and Data Claims on UPS.com[®]



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Overview

Administration is the single access point to administer the following UPS services: Quantum ViewSM Manage, Quantum ViewSM Data and Claims on UPS.com[®].

System Requirements

To access Administration, you will need a computer connected to the Internet. Administration is compatible with Netscape[®] Navigator[®] versions 4.7 through 6.2 and Microsoft[®] Internet Explorer version 4.0 with Service Pack 2 (Active X enabled), and higher.

Enrollment

You will need to assign a Company Administrator for applicable services. They will be the point of contact for the UPS Account Executive for setting up and maintaining your account.

The Company Administrators will have visibility on all UPS account numbers or locations that were provided to your Account Executive at the time you enrolled. Users will have access only to those account numbers or locations authorized by the Company Administrator. To add any additional UPS account numbers or locations, the Company Administrator should contact the UPS Account Executive for assistance.

Logging In

Upon enrollment, the Company Administrator will receive two separate e-mails containing a link to the Administration site, as well as to the service to which your company has subscribed:

- The first provides your User ID
- The second provides your temporary password

If you forget your password, click on the **Forgot User ID or Password** on the login page. You will be sent a temporary password to the registered e-mail address.

For Quantum View Users

The storage of package status information begins once the Company Administrator logs in the first time and agrees to the Terms and Conditions. Until this time, package status information will not be available.

After you log in for the first time:

Manage Users:

Select the link at the bottom of the Welcome page to Set Preferences. This allows you to view your information in a specific format each time you log on. You can view detailed instructions for setting preferences in the *Quantum View Manage User Guide*.

Data Users:

You have two options — create/edit a subscription or download data files for subscriptions that your Company Administrator has already created for you.

If your Company Administrator has not created a subscription for you, there will be no data files to download. To create/edit a subscription, select the Data Subscriptions link on the Access Quantum View page. More detail on page 9.

For Claims on UPS.com Users

Once you log in for the first time, we recommend you to set up your history view and e-mail preferences. Setting up your history view will provide information most important to you in a single view. The detail view for claims status is always accessible from the claims history page.

Note:

When you log in for the first time, you will be required to agree to the UPS Terms and Conditions for the administered application and for My UPS.

This creates a single ID and password for both the administered application and UPS.com[®].

You will be prompted to change your temporary password on your first login.

Remember: User IDs and passwords are case sensitive. Plus multiple failed attempts to log in will cause your ID to be locked out for a period of 20 minutes.

Help: Contact Customer Support at 800-247-9035

Navigation

Administration can be accessed from My UPS on the left-side navigation of UPS.com.

Access to Quantum View Manage and Quantum View Data is located under the Tracking tab on UPS.com.

To access Claims on UPS.com, visit *ups.com/claims* or navigate UPS.com by going to the **Support** tab and selecting **Claims** under the Customer Service section.

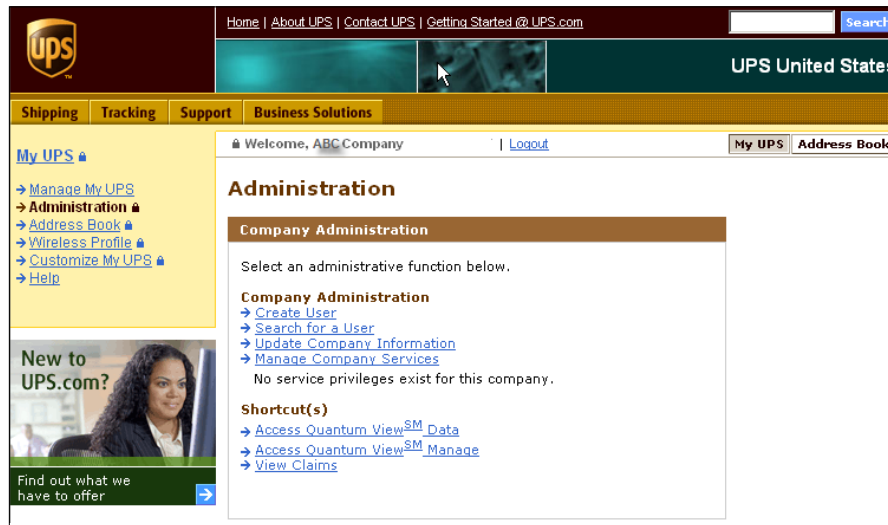
A comprehensive Help section is located in the yellow menu bar on the left of the screen.

You can navigate to other parts of UPS.com at all times with the buttons and tabs located in the top portion of your screen.

For Quantum View Manage Users

To view your Outbound, Inbound, Alternate Billing and Imports packages, click the appropriate hyperlink in the left navigation bar.

Each of these views provide hyperlinks for Custom Views and Alerts (more information on this functionality in the following pages. Note that the Imports View provides hyperlinks for Custom Views and Import Resources.



For Quantum View Data Users

Two Quantum View Data options are available from the Track with Quantum View page:

- Access Quantum View Data Files — Used to manually download data files
- Data Subscriptions — Used to create/update subscriptions

Note that users may create subscriptions based solely upon the type of services and privileges that have been assigned to them.

For Claims on UPS.com Users

Choose Claim History or Set Preferences from the left-side navigation.

Administration

Company Administrators can:

- Edit your company information
- Create additional user(s) and/or administrator(s)
- Manage your service information by assigning privileges or subscriptions to control access to the information available
- Search for a user and/or administrator

Update Your Company Information

This section allows you to edit information such as your company name, address and primary company contact information.

1. Select **Update Company Information**.
2. Enter the appropriate changes then select **Update** →.

Manage Company Services

The Manage Company Services section provides Company Administrators with an overview of subscribed applications and services (Outbound, Inbound LID, Inbound Receiving Address, Alternate Billing, Imports and Claims) and a listing of your company accounts or locations (privileges) associated with those services.

Administration

Manage Company Services

Company Information

Company Name: QVMUATUSA
Company Nickname: qvmuatusa

The services available for your **company** are listed below. Select the appropriate link to view the details about a service.

Quantum View

Service	Status	Action
Outbound	Active	View
Inbound Location IDs	Active	View Create
Inbound Receiving Addresses	Active	View
Alternate Billing	Active	View
Imports	Active	View

[← Back to Company Administration](#)

To view:

1. Click the **Manage Company Services** hyperlink.
2. Click **View** next to the service you wish to review.

If you would like to add or remove an account or location, please contact your UPS Account Representative.

Note:

Imports is available only to Quantum View Manage users.

We suggest you have all available accounts/locations loaded into Quantum View prior to adding additional users.

Create a User and/or Administrator

1. Select Create User.
2. Fill in the User/Administrator information.
3. In the User Access section, check which service (Quantum View Manage, Quantum View Data or Claims) the user will have access to.
4. In the Administrator section, check the appropriate box if you would like to grant administrative-level authority to the user by service.

This will allow the user to view all available services and add additional users.

5. Click **Create →**. A Create User Confirmation will display. Verify all the information for the user/administrator just created.
6. Click the hyperlink **Go to Manage User Services** to assign the privileges for this user.

Note: Each user will receive two separate e-mails containing a link to the administered service site:

- The first provides the User ID
- The second provides the temporary password

Administration

[Help](#)

Create User

Company Information
Company Name: UATCompany_COWQVALL
Company Nickname: uatcompanycowqvall

Enter the user information below and select **Create**. Required fields are shown in **bold**.

User/Administrator Information

Name:

User ID:

Street Address:

City:

State/Province/Country
(US/Canada/Ireland): **Other:**

Postal Code **(Required for countries with an *)**:

Country:

E-mail:

Telephone: **Ext:**

Fax:

User Access

Quantum ViewSM Manage User
 Quantum ViewSM Data User
 Claims User

Administrator Access

Quantum ViewSM Company Administrator*
 Claims Company Administrator*

*Company Administrators assign and control the rights of other users. Users of both Quantum View Manage and Quantum View Data should note that Quantum View Company Administrators have administrator-level privileges in both applications.

[Cancel](#) [Create →](#)

Note:

Indicate a Company Administrator by checking the applicable box in the Administrator Access section at the bottom of the screen to assign all privileges and all services.

Assign Privileges

Once the Company Administrator has created users, the next step is to assign privileges. In other words, what services (Outbound, Inbound LID, Inbound Receiving Address, Alternate Billing, Imports, Claims) should each user have access to and for which accounts or locations.

You assign privileges from the User Administration page. You can access this page by:

- Clicking the **Go to Manage User Services** hyperlink when you create a new user.
- Or, selecting the **Search for a User** hyperlink on the Administration home page. (See the following page for instructions on “Search for a User.”)

1. Click **Manage User Services**.
2. Click **Edit** next to the applicable service.
3. On the next page, select only the account number(s) or location(s) you wish the user to have access to.
4. Select **Update** →.
5. Repeat these steps to assign privileges for each service.

(continued)

Administration

User Administration

User Information
Name: USA User
User ID: qvmutusa_admin

User Administration
 Select the administrative function below.

- [Manage User Services](#)
- [Edit Quantum ViewSM Data Subscriptions](#)
- [Update User Information](#)
- [Reset User Password](#)
- [Delete User](#)

- [Modify Search](#)
- ← [Back to Company Administration](#)

Shortcut(s)

- [Access Quantum ViewSM Data](#)
- [Access Quantum ViewSM Manage](#)
- [View Claims](#)

Administration

Manage User Services

User Information
Name: USA User
User ID: qvmutusa_admin

The services available for the current user are listed below. Select the appropriate link to manage a service.

Quantum View		
Service	Status	Action
Outbound	Active	Edit Suspend
Inbound Location ID	Active	Edit Suspend
Inbound Receiving Addresses	Active	Edit Suspend
Alternate Billing	Active	Edit Suspend
Imports	Active	Edit Suspend

← [Go to User Administration](#)

Administration

Assign Quantum View Outbound Accounts

User Information
Name: USA User
User ID: qvmutusa_admin

The Outbound Accounts available are listed below. Select the accounts you want and select **Update**.

Outbound Accounts
 Displaying 1-10 of 11
[Previous](#) | [Next](#)

Account Name	UPS Account No.	Country	Status
<input checked="" type="checkbox"/> USA COMPANY INC.	A1BCD2	US	Active
<input checked="" type="checkbox"/> DOWN UNDER EXCLUSIONS	B0D3EF	AU	Active
<input checked="" type="checkbox"/> THE BRUSSELS COMPANY	CDEF4G	BE	Active
<input checked="" type="checkbox"/> PIONEER AVIATION	GH5IJK	US	Active
<input checked="" type="checkbox"/> BERLIN CONSTR. CO.	K6LMNO	DE	Active
<input checked="" type="checkbox"/> KUALA LUMPUR CO. LTD.	OPQ6RS	MY	Active
<input checked="" type="checkbox"/> ABC SERVICES INC.	7STUVW	US	Active
<input checked="" type="checkbox"/> RIO FINANCIAL COMPANY	WXYZ12	BR	Active
<input checked="" type="checkbox"/> HANSO/DARMA PRODUCTS	3ABC4D	US	Active
<input checked="" type="checkbox"/> TORONTO TRAVEL SVCS	DE5678	CA	Active

Note:

Company Administrators will have access to all privileges within the company, upon initial company creation.

For subsequent service and privilege additions, each user must be assigned the added service/privileges for them to be viewable.

The Manage User Services screen will confirm that the privileges assigned to the user are active. Note that at this point, Company Administrators are able to create Quantum View Data subscriptions for users. For more information regarding creating subscriptions, see page 9.

The **Suspend Privileges** link appears on the Manage User Services screen after privileges have been assigned. You may use this link to remove or suspend all privileges for a user.

Remove or Suspend Privileges

Select **Suspend Privileges** next to the applicable service.

Search for a User and/or Administrator

1. Select the criteria you would like to search by using the pull-down menu to select **User Name** or **User ID**.
2. Select the search criteria by using the pull-down menu to select **Contains**, **Starts With** or **Equals**.
3. Click the check box to search only administrators.
4. Enter the word or phrase you are searching.
5. Select **Search**.

Optional search criteria are available on the lower portion of the screen. Search for an account number or Location ID in a selected view.

Delete a User

1. Search for the user's profile as described above.
2. If the user is an administrator, click the **Update User Information** link and remove Company Administrator authority and select **Update**.
3. Click **Delete User**.
4. Select **Delete**.
5. You may skip step 2 if the user is not an administrator.

Note:

After suspending a privilege, the privilege for this user and service become Inactive and the link to suspend privileges now reads Unsuspend Privileges view (Outbound, Inbound Location ID, Alternate Billing).

Anytime you want to make changes to a particular user's privilege set, you must use the search functionality to find that user's information within the system.

Deleting a user removes their Quantum View privileges as well as any My UPS privileges for that User ID.

Quantum View Data — Create Subscription

Quantum View Data Administrators and Users must create Subscriptions in order to view shipment information. Subscriptions allow you to select the types of data you want to receive for each Quantum View Service and what format you want to receive them in.

The type of subscriptions that are available by service are as follows:

- Outbound
 - Outbound Notification
 - Exception Notification
 - Delivery Notification
- Inbound
 - Inbound Notification
 - Inbound and Delivery Notification
- Inbound Receiving Address
 - Inbound Notification
 - Inbound and Delivery Notification
- Alternate Billing
 - Alternate Billing Notification
 - Exception Notification
 - Delivery Notification

Both Users and Administrators can create Quantum View Data Subscriptions for services and privileges that have already been assigned. To create Quantum View Data Subscriptions, log in to Quantum View. For navigation instructions, see page 4 of this guide.

Note:

If a user needs visibility of an account, Inbound Receiving Address or Location ID, that has not been added to the company's privileges, the Company Administrator must contact their UPS Account Representative to request visibility of the account/Location ID and the corresponding service that is desired for the account — Outbound, Alternate Billing, Inbound Receiving Address or Inbound Location ID.

Administrators

Administrators start by selecting **Create a New User** or **Search for a User**.

- To start by selecting **Create a New User**, complete the steps on page 6 — **Create a User**, then go to the **User Administration** page to assign privileges to the User. (See page 7 for instructions.)
- To start by **Searching for a User**, complete the steps on page 8 — **Search for a User**, then select the link for the user to access the **User Administration** screen. (Note: Privileges must already be assigned to the user in order to create a subscription. If no privileges have been assigned, follow the instructions on page 7 to **Assign Services**.)

Then from the **User Administration** page, click **Edit Quantum View Data Subscriptions** and follow the instructions below.

Users

Users start by selecting **Data Subscriptions** from the **Access Quantum View/Get Quantum View Data Files** page after you log in.

1. At the **Quantum View Administration — Manage Data Subscriptions** page, select the link for the type of subscription desired — **Outbound**, **Inbound Location ID**, or **Alternate Billing**.
2. Select the link **Create New Subscription**.
3. At the following detail screen, enter the required information.

(continued)

Get Quantum View Data Files

Select Files for Download Help

Select Download to get files, or change your file selections below.

Download:
 Select:
 Unread Files
 Read Files
 All Files

Date Range:

[Show individual files](#)
[See file size and estimated download time](#)
[Data Subscriptions](#)

Quantum View Administration

Manage Data Subscriptions

User Information [Edit](#)

User Name: Tracy Young
 User ID: tyoung

Quantum View Data Services
 Select a link below to create a new subscription, or view or edit the details of an existing subscription.
[Outbound Subscriptions](#)
[Inbound Location ID Subscriptions](#)
[Alternate Billing Subscriptions](#)

Quantum View Administration

Outbound Subscription Summary

To access an Outbound subscription, click the appropriate **Edit** link below. Select the **Delete** link to permanently remove a subscription. To change the status of a subscription, click the appropriate link in the status column.

To create a new Outbound subscription, select the **Create New Subscription** link.

Outbound Subscriptions

Subscription Name	Status	
ty subscription test	Active	edit delete

[Create New Subscription](#)
[Back to Manage Subscriptions](#)

Quantum View Administration

Outbound Subscription Detail

Enter a unique name for this subscription, select a service option and a download option, and select **Submit**.

Service Information
Subscription Name: (Up to 21 characters)

Options:
 Outbound Notification (Includes Exception and Delivery)
 Add complete manifest elements
 Exception notification
 Delivery notification
 Add complete manifest and origin elements

Subscription Date Created:
 January 6, 2005

Available UPS Accounts
 The available UPS accounts are listed below. Select the accounts to be included in your subscription.
UPS Account Numbers:

UPS Account Number	Account Description
<input checked="" type="checkbox"/> 122456	JAKE'S WIDGETS - DOWNTOWN
<input checked="" type="checkbox"/> 294687	JAKE'S WIDGETS - NE CORRIDOR
<input checked="" type="checkbox"/> 346678	JAKE'S WIDGETS - SOUTH BEND

[Select All](#) | [Clear All](#)
Note: To add UPS accounts, please contact your Company Administrator.

Download Options
 Select how you would like to receive your Outbound files.

Web File Download:
 Select your file format for download from UPS.com.

Comma-separated value
 Used with Microsoft Excel, Access, etc.
 Flat File
 Used with Oracle, SQL, Lotus123, etc.
 XML
 Used with Oracle, SQL, Lotus123, etc.

E-mail Notification Address:

E-mail Notification Language:

 Notify me when files are posted to UPS.com.

Note: File updates are posted as frequently as hourly if new information is available to report.

Automated File Download:
 You can automate the download process to give you faster and easier access to your data. Set preferences for downloading your files from UPS.com where you can always retrieve your files.

Autoload
 Autoload Windows-based software utility that automatically downloads your files directly to your computer. Configure your subscriptions to specify download times, file format, and file storage location.

UPS OnLine® Tools
 UPS OnLine® Tools File Download for Quantum View™ is an XML-based tool that allows you to automatically retrieve files up to every hour and import them directly into your back-end systems. This tool can be seamlessly integrated with almost any database or enterprise system.
 Integration of UPS OnLine® Tools File Download for Quantum View requires information technology resources and familiarity with XML.

Note: If you select an automated download option, you are not required to use it. You can always retrieve your files from UPS.com.

Note:

When a Company Administrator creates a subscription for a user, there is no option to select an automated file download option. The default is Web download. To change to an automated file download option, the user must edit the subscription.

4. Select the **Submit** → button.
5. The Subscription Confirmation page will appear.
6. For Users Only: If a User selects either of the Automated File Download options, your confirmation screen will contain additional information regarding getting started with Autoload or the UPS OnLine Tool — File Download for Quantum View. For more information regarding Automated File Download options, please refer to page 15.

Change or Update an Existing Subscription

Both Users and Administrators can change or update Data Subscriptions. To change Data Subscriptions, log in to Quantum View. For navigation instructions, see page 4 of this guide.

Administrators

Administrators start by selecting **Search for a User**. To start by Searching for a User, complete the steps on page 8 — Search for a User, then select the link for the user to access the Manage Services — User Administration screen. (Note: Privileges must already be assigned to the user in order to create a subscription. If no privileges have been assigned, follow the instructions on page 7 to Assign Services.)

Then from the User Administration page, click **Edit Quantum View Data Subscriptions**.

(continued)

Quantum View Administration

Outbound Subscription Confirmation

The subscription Test 1 has successfully been added to your Quantum ViewSM Data outbound service.

Subscription Information

Name:	Test 1
Option:	Outbound Notification Complete elements requested
Date Created:	January 6, 2005
Associated UPS Accounts:	123456 234567 345678

Download Options

File Format:	Comma-separated value
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Select the **Back to Manage Subscriptions** link to return to the Quantum View Data service management options.

[← Back to Manage Subscriptions](#)

Users

Users start by selecting **Data Subscriptions** from the Access Quantum View/Get Quantum View Data Files page after you log in.

1. At the page Quantum View Administration — Manage Data Subscriptions, select the link for the type of subscription that you would like to edit — Outbound, Inbound Location ID, Inbound Receiving Address or Alternate Billing. A list of the current subscriptions will appear.
2. Select the **Edit** link next to the name of the subscription that you would like to edit.
3. Review the subscription details on the following page and make the appropriate edits.
4. Select **Submit** →.
5. The subscription Confirmation page will appear.

Change the Status of a Subscription

You can temporarily change the status of your subscription at any time. Active subscriptions can be deactivated or deleted. Inactive subscriptions will not provide updated shipping information — there will not be updated data files to download from UPS.com, Autoload or the UPS OnLine Tool — File Download Tool for Quantum View. Inactive subscriptions can be reactivated after deactivation. A subscription that has been activated after a period of inactivation will begin to store and download shipping information for packages that have been manifested since the subscription was activated.

(continued)

Quantum View Administration

Manage Data Subscriptions

User Information [Edit](#)

User Name: Tracy Young
User ID: tyoung

Quantum View Data Services

Select a link below to create a new subscription, or view or edit the details of an existing subscription.

- [Outbound Subscriptions](#)
- [Inbound Location ID Subscriptions](#)
- [Alternate Billing Subscriptions](#)

Quantum View Administration

Outbound Subscription Summary

To access an Outbound subscription, click the appropriate **Edit** link below. Select the **Delete** link to permanently remove a subscription. To change the status of a subscription, click the appropriate link in the status column.

To create a new Outbound subscription, select the **Create New Subscription** link.

Outbound Subscriptions

Subscription Name	Status		
Test 1	Active	Edit	Delete
ty subscription test	Active	Edit	Delete

[→ Create New Subscription](#)
[← Back to Manage Subscriptions](#)

Note:

If you choose to add or delete any UPS Account Numbers, Location IDs or Inbound Receiving Addresses, you will need to select the Edit link on the subscription detail page, make the appropriate changes, then select

Update before continuing.

To change the status of a subscription:

1. Go to Manage Data Subscriptions previously outlined on page 11.
2. Select the subscription to change.
3. Select the hyperlink under the Status column (i.e., Active, Inactive or Suspended).
4. On the next page, select from the drop-down (Active, Inactive or Suspended).
5. Select **Update** .

Quantum View Administration

Update Subscription Status

Select the updated status of this Outbound subscription from the drop down list below.

Subscription Name: Test 1
Date Created: January 6, 2005

Active
Inactive
Suspended

Cancel to return to the subscription

Note: By making the subscription inactive, your data will no longer be available for download.

Cancel **Update**

Quantum View Data — Download Data Files

Quantum View Data customers that have already created a subscription have three options for downloading their data files:

1. Web download
2. Autoload
3. UPS OnLine Tool — File Download for Quantum View

For more information regarding Autoload and File Download for Quantum View, please see the section “File Download Options” on page 15.

To download files from UPS.com, Quantum View Data users should complete the following steps:

1. Log into Quantum View Data.
2. Select the subscription name or type of subscription from the Download drop-down menu.
3. Select the radio button to download read files, unread files or all files.
4. Select the date range from the Date Range drop-down menu.
5. To view the file download size and estimated download time, select the link [See File Size and Estimated Download Time](#).
6. Select [Download →](#).

Get Quantum View Data Files

Select Files for Download [Help](#)

Select Download to get files, or change your file selections below.

Download:

Select:

- Unread Files
 Read Files
 All Files

Date Range:

Last 7 Days

[+ Show individual files](#)

[See file size and estimated download time](#)

[→ Data Subscriptions](#)

[Download →](#)

File Download Options

Autoload

Autoload is a simple way to get your Quantum View Data files, when you need them. This easy-to-use software utility automatically downloads your Quantum View Data files directly to your computer. No more logging in to manually access your files. Autoload is a great option if you need a quick solution and do not have access to programming resources. (Note: Autoload is only available to U.S. domestic Quantum View Data customers with an active subscription.)

You may download Autoload from the subscription confirmation page after creating your subscription. Or, access Quantum View Help from the Tracking tab, then select **Quantum View Data**. After downloading the software, you will be prompted to configure the download schedule and specify a location on your hard drive for storing the data files.

Prior to downloading Autoload, you must change the file download option for your subscription to “Autoload.” Please refer to the section entitled “Edit your Subscription” for details regarding how to change the file download option. To download Autoload software:

1. Access <http://www.ups.com/content/us/en/tracking/help/quantumview/data/autoload.html>.
2. Access Quantum View Help, then Quantum View Data.
3. Search for Autoload.

UPS OnLine Tool — File Download for Quantum View

The UPS OnLine Tool — File Download for Quantum View is an XML-based tool that allows Quantum View Data users to automatically retrieve data files and import them into your back-end systems and databases. The Tool is part of the OnLine Tools product suite and is used via your existing Internet connection. In order to request the Tool, the customer must have a My UPS User ID.

To download the Tool:

1. Access the UPS e-Commerce Web site at www.ec.ups.com.
2. Click on the **Solutions** menu item.
3. Click on **UPS OnLine Tools**.
4. Select **File Download for Quantum View**.
5. Select the link **Register**.
6. Review the information, then select the link **Register** from the section entitled “Here’s What You Must Do As An End User” and follow the instructions.

You will be provided with information regarding how to complete the UPS OnLine Tools registration and receive the documentation necessary to get started with programming.

Technical Support

Technical support is available by phone at 800-247-9035.

Phone support is available:

Mon.-Fri. — 7:30 a.m. to 9:00 p.m. (EST)

Sat. — 9:00 a.m. to 6:00 p.m. (EST)

Sun. and Holidays — 9:00 a.m. to 6:00 p.m. (EST)

To e-mail a support question, access UPS Technical Support at:

http://www.ups.com/forms/e-mail/technical?loc=en_US.

For the claims application, select “Other” as the UPS Product and note “Claims” in the Comments section.