ShipExec Thin Client – User Guide

This document describes the use of ShipExec specifically related to the use by OSU. More general guides for ShipExec can be found in the links below.

Links for reference:

ShipExec
UPS ShipExec Help Pages
Address Book User Guide
UPS Dry Ice and Hazardous Materials Support

Sections:

ShipExec Account Setup
Service Notes
Standard Shipment
Domestic Dry Ice Shipment
Standard International Shipment
Creating a Return Shipment
Troubleshooting & FAQ

New ShipExec Account Setup

Before gaining access to the ShipExec system you must:

1. Review this document and any training links included.
2. Successfully complete the Shipping Assessment in BuckeyeLearn.
3. Complete the UPS ShipExec Shipping Access Request Form.
4. Email the form to osums@osu.edu.

Once these steps were completed, someone at OSUMS will setup your account username using your University or OSUMC email.
Shipping Service Notes:

- Packages with Hazardous Materials must be brought to Customer Service at Central Receiving to be processed.
- If it is necessary to reuse a container that has hazardous materials labels, those labels **must be completely covered or still apply to the new shipment**.
- Please note that OSU employees are not permitted to provide either the OSU UPS or FedEx account number to an outside entity. A return label may be sent to accommodate an in-bound shipment paid for by OSU.
- Errors in the shipping of Hazardous Materials (including Dry Ice) may result in the suspension of your shipping account access. Any fines incurred because of a shipping violation may be charged back to your department.
Shipping with ShipExec Thin Client

Standard Shipping

Upon login, you will be presented with the ShipExec Dashboard. To ship a standard domestic package, follow these steps:

1. Locate the “Shipping” drop down menu in the ShipExec ribbon at the top of the page. Select “Shipping and Rating” from the available choices.
2. You are now presented with the Create a Shipment workspace. Note that several form fields are highlighted red and with a blue asterisk next to the labels. These forms must be filled out to complete the shipment.

   ![ShipExec Dashboard](image)

   **Address Information**

   1. In the **Ship-To Information** tab, enter the recipient’s name and address. Enter the email address and phone number if applicable.
      a. **Note** – The State field must be in all CAPS in abbreviated form
   2. Click on the **Ship-From Information** tab. This should be prepopulated with your personal information.
   3. Once the address information is complete, click on the **General** tab to begin inputting package specifications.
Shipment Information

1. On the **General** tab, select the Shipper. The default is the University UPS account.
2. Select who to Bill Shipping Charges to. The default is the University UPS account.

Note that there are options to Bill Receiver or Third Party. If applicable, select an option and complete the additional form.
Package Information

1. Now select your package specifications.
   a. Select number of packages
   b. Select package type – If the packaging is not UPS supplied, select “customer supplied” from the drop down.
   c. Enter weight
   d. Enter description of goods – Required for Return shipments
   e. Enter dimensions – failure to include dimensions will result in a UPS correction charge.
   f. Enter declared value – all shipments are covered with $100 insurance coverage. Inputting a value in this field will increase this insurance and will result in additional fees.
   g. Select Delivery Confirmation options if applicable. Note that selections will result in additional fees
   h. Select Return Label if applicable – note that creating a Return shipment is covered in an additional section below.

2. After the Address Information, Shipment Information and Package Information forms have been filled out, click on the Visibility Tab.
3. Select any of the notifications that you wish to receive for the shipment. The email address field should default to your login account.

4. Next, click on the Reference tab.
5. Enter the department account information that the shipping charges should be applied to.
   a. Required Worktags are highlighted in red.
   b. Additional Worktags *(Project, Gift, Activities, Assignee, Location)*
      ▪ Separate multiple additional Worktags with a period “.” - i.e. - PG106108.AE101400

6. Click the blue **Continue** button to proceed to the **Rates** screen.

7. The Rates screen provides shipping options for your package sorted from lowest to highest ranked service. Pick the service level that is applicable to your shipment and click the blue **Ship** button to continue.
   a. Note that these rates are estimates only.

8. If a rate other than ground is selected, the system will ask why you are choosing to upgrade. This is required.

9. Once the shipment has been generated, a window should display your UPS shipping label that is now ready to print.

10. Your standard, domestic shipment is now complete.
Shipping with ShipExec Thin Client

Domestic Dry Ice Shipping

Before shipping dry ice, review the UPS Support webpage regarding dry ice and hazardous materials. Note that packages with Hazardous Materials must be brought to Central Receiving to be processed. The exception to this policy is dry ice which can be shipped via ShipExec using the steps below.

Note: Packages shipped with dry ice must comply with both 49CFR and IATA shipping regulations.

Upon login, you will be presented with the ShipExec Dashboard. To ship a domestic Dry Ice package, follow these steps:

1. Follow the process steps described in the section called “Standard Shipping.”
2. At the Reference tab, complete these additional steps:
   a. Under the DRY ICE drop down field, select the proper shipping name UN1845, DRY ICE, 1 x
   b. In the Weight in KGS field, enter the weight of the dry ice. For example, manually type out 5 KGS.
3. Continue with the process steps described in the section called “Standard Shipping” until complete.
4. After printing the UPS shipping label, verify that the label contains the following information in the Reference No. 2 field: UN1845, DRY ICE, 1 x 5kgs.

Note: When shipping with Dry Ice,” UN1845 Dry Ice” must be listed on both the outer shipping container and on the shipping label. Failure to include the proper shipping name in the Reference 2 field of any shipment that contains Dry Ice will result in a UPS Shipping violation.
Shipping with ShipExec Thin Client

Standard International Shipping

Upon login, you will be presented with the ShipExec Dashboard. To ship a package internationally, follow these steps:

1. Follow the process steps described in the section called “Standard Shipping.”
2. Complete the additional steps on the Int’l tab. This is the international tab.

- Check mark the options that apply to the shipment
- Enter a Monetary Value
- Select a Commercial Invoice Method that is applicable to your shipment
- Enter your Automated Export Number in the AES Transaction Number field if applicable
- Select “UPS Account” from the Bill Duties and Taxes To form field
- Enter an export reason for your shipment
- Provide a Description of Goods for your shipment

3. Continue with the process steps described in the section called “Standard Shipping” until complete.
Shipping with ShipExec Thin Client

Standard Return Shipping

Upon login, you will be presented with the ShipExec Dashboard. To create a Return shipment, follow these steps:

1. Follow the process steps described in the section called “Standard Shipping.”
2. On the General tab, complete these additional steps to create the Return label:

   a. Locate the Package Information section.
   b. Check mark the Return Label button. Note that this will change the Ship-To Information tab with the Ship-From Information tab in the Address Information section.
   c. The Return Delivery drop down form field is now unlocked. Select “Print Return Label” from the available drop-down options.
   d. Description of Goods is required for return shipments.
   e. Continue with the process steps described in the section called “Standard Shipping” until complete.