# ORDER WATCH<sup>®</sup> EMPLOYEE USER GUIDE





### Section 1: Introduction

#### 1. Introduction

#### 1.1 Overview

This user manual will give you the information needed to manage and track shipments and instruct you on the following topics.

- Entering and maintaining Purchase Orders
- Creating Shipping Orders
- Creating and Uploading Documents
- Vendor Compliance
- Reporting through saved views

The system provides end to end tracking and tracing across multiple transportation modes.

Customer profiles will be created by Order Watch Administration; locations and vendor information will be available by customer in the drop down windows.

Users must continue to use the customer Standard Operating Procedures for specific client requirements in regards to data entry requirements.

#### <u>FGV</u>

Mapping will be provided from Order Watch to Flex Global View (FGV) to maintain the visibility of shipments upon deployment.

#### Vendor Information

It is the intention for Order Watch to be interactive with vendors having some limited access to the application. Some but not all vendors will be trained on how and what data to enter into the system for "online booking" in the SO creation. Vendor participation will be based on client requirements, volumes shipped, and other criteria yet to be determined.

#### <u>Version</u>

Always use the online version of this document for the most up to date information.

#### **1.2 System Requirements**

Hardware Requirements:

Operating System: Windows 7 Professional, Windows 7 Enterprise, or Windows 7 Ultimate

GT Nexus recommends the hardware configuration given below:

- 1-gigahertz (GHz) 32-bit (x86) processor or 1-GHz 64-bit (x64) processor
- 2-4 GB of system memory
- 100-GB hard disk that has 15 GB of free hard disk space (the 15 GB of free space provides room for temporary file storage)
- Internet access capability
- Audio output capability

Software Requirements:

The GT Nexus platform runs on computer systems that support Microsoft Internet Explorer (IE). The browsers currently supported are:

- Internet Explorer version 8.0
- Internet Explorer version 9.0

Use the following link to download Internet Explorer or update to the most recent version:

http://www.microsoft.com/en-us/download/ie.aspx?q=internet+explorer



## Section 2: System Access

#### 2. System Access

#### 2.1 Users and System Passwords

System access is granted by Supplier Management Order Watch System Administrators. Administrators will assign Login and identification credentials to individual Client Users.

The system will send a "Welcome" email to the newly assigned User. Upon receipt of the email, the user will have 48 hours to click the link and establish their password. The User can change their password at any time.

**NOTE:** UPS prohibits giving a password to others or exposing it to public view



### Section 3: Login and Initial Setup

#### 3. Login and Initial Setup

#### **3.1 Logging in to Order Watch**

To access the system, go to the site below and enter your username and password:

https://www.orderwatch.ups.com

UF	Order Watch®
Regis	stered users, please log in:
	User Name
	Password
	ecurity, after 10 unsuccessful login attempts your account will be locked.
	've forgotten your password or your account is locked, you may <u>request a new password.</u> I need further assistance, <u>email</u> to Order Watch Customer Service.

After entering your user name and password, you will land on the Order Watch Home page.

Order Watch <sup>®</sup>	HELP   G2/COMMUNITY   CONTACT SUPPORT	
Home Origin Operations Integration Intelligence Administration	Non-production Environm	
Welcome,	Customer Costco	
	1	
Search		
Advanced Search By Value		
Shipping Orders   Purchase Order   O05840702584	E Search	
Go Το	Help Center	
Select One 🔻 Go	How Do I 🔻 Go	
Select a page and click "Go"	Help Resources	

On this page you will see Major Tabs (the top bar) that are referenced throughout the user manual.

#### 3.2 How to change a password

In order to change your password, choose the drop-down menu next to your name on the far right at the top of the screen, then select change password.

Order Watch®	- i - i - i - i - i - i - i - i - i - i	NTACT SUPPORT
Home Origin Operations Integration Administration No	m-product	Display Settings
Search	I	Notifications Scheduled Views History
Advanced Search By Value B/L Instructions  B/L Number B/L Number Search	L	Log Out

The next screen will prompt you to enter a new password. Create a new password that adheres to the requirements listed and select change.

Order Watch®	HELP   G2/COMMUNITY   CONTACT SUPPORT	•
Home Origin Operations Integration Administration	Non-production Enviro	nment -
Change Password Your new password must be at least 7 characters long. To increase security on your account, we further recommend that your new password: • Includes characters from the following groups: A-Z, 0-9, or special characters I @ ≠ \$ % ^ & * ()_ + • Contains a mix of upper and lower case letters • Ontains a mix of upper and lower case letters • Ontains a mix of upper and lower case letters • Ontains a mix of upper and lower case letters • Ontains a mix of upper and lower case letters • Doesn't match one of your last five passwords		Help ?
Old Password		
New Password Re-type to verify		
Change		



### Section 4: Navigation

#### 4. Navigation

#### 4.1 Major Tabs and Sub tabs



There are 5 Major Tabs within the Order Watch Application: Home, Origin Operations, Integration, Intelligence and Administration. Sub Tabs appear after selecting a specific tab. Sub Tabs will vary based on the tab you have selected.

#### 4.2 Quick Search

order Watch®	HELP   G2/COMMUNITY   CONTACT SUPPORT   •
Home Origin Operations Integration Intelligence Administration	Non-production Environment
Welcome,	Customer Costco Y
Search	
Advanced Search     By     Value       B/L Instructions     ▼     B/L Number     ⊕         Search	

You will always land on the Customer that you last accessed before leaving Order Watch when you log on to the system.

#### NOTE: Customers must be changed from the HOME tab

You can use the Search feature to find information related to an order. You must have a specific value to search for when you use quick search

On the Home page, under Search, select the first drop-down menu and choose a module.

Search						
Advanced Search	By V	/alue				
B/L Instructions	B/L Number 👻		+ Se	earch		
B/L Instructions						
Bills of Lading						
Bookings						
Contracts Documents					Help Center	
Draft Manifests		-				
FCRs	🔻 G	10			How Do I	✓ Go
(ISF (10+2)						
Orders					Help Resources	▼ Go
Shipment Plans					Select a help topic and click "Go"	
Shipments					beleet a help topic and eller 60	
Shipping Orders Warehouse Receipts						
(warehouse Receipts	]					
My Saved Views	▼ G	60				

In the by drop-down menu, select the type of data.

Search		
Advanced Search By	Value	
B/L Instructions	▼ Earch	
Booking Number Other References		
Go To Vessel Name Voyage Number	Help	Center
Select One	▼ Go How	d Do I 👻 Go
Select a page and click "Go"	Help	Resources 👻 Go
	Salar	t a bala tania and aliak "Co"

In the Value text box, enter the value of the data you are searching for.

Order Watch®	HELP   C2/COMMUNITY   CONTACT SUPPORT
Home Origin Operations Integration Intelligence Administration	
Welcome,	Non-production Environment Customer Costco
Search	
Advanced Search     By     Value       B/L Instructions     B/L Number     B/L Search	

When the user logs in to the portal again, the Value text box retains the last search value entered.

To search for a request using multiple values, click the "+" sign next to the Value text box.

You can search for a maximum of 3 parameters at the same time.

**NOTE:** For some types of data, you can search by entering a partial value along with a wildcard such as the percent sign  $\hat{A} \in \hat{A}^{"} \otimes \hat{A} \square \hat{A}^{TM}$  or asterisk  $\hat{A} \square \hat{A}^{TM}$ . You must enter a minimum of 3 characters followed by the wildcard. For example, in the **By**  $\hat{A}$  drop-down menu, select **Reference Number** and enter  $\in$  **\*565**  $* \in \mathbb{T}^{TM}$  to pull up all requests whose reference number starts with  $\stackrel{*}{\in} 565 \in \mathbb{T}^{TM}$ . To add multiple values, separate them with a semicolon.

The Advanced Search link opens a new web page with additional search criteria which help narrow down the search results.



**NOTE:** It is important to first select the component before you perform an advanced search as the criteria displayed changes depending on the component you choose. This means that if orders is selected in the first drop-down box and then the Advanced Search link is clicked, the search criteria is specific to orders. Similarly, the search criteria that is displayed when another module like shipments is selected, is different.

#### 4.3 Help Center

The Help Center link will take you out of Order Watch to the GTN user guide, that will give you technical help, but the instructions will not always match the layout of the UPS Order Watch screens, procedures, or information.

**NOTE:** For best results, always access the Help Center from the Homepage of Order Watch.

Order Watch®	CONTACT SUPPORT
Home Orders Shipments Documents Exceptions Integration Intelligence Administration	
Welcome,	Help ?

**NOTE:** Please direct all system related questions to your Supplier Management Account Manager. They will work with the Order Watch team for resolution. Do not call or email or GTN directly.

Enter your User Name and Password, and select the login button to access the Help Center.

GTNEXUS	
Registered users, please log in:	
User Name	
Password	
LOGIN	

The GT Nexus Help Center has many useful features for accessing the information you may seek in order to complete tasks. Three of the most useful features include:

• How to Guides

- What's New
- The Search Feature

	Search My Workspaces: 👻	٩
Dashboard   Groups ▼   Signals   Workspaces   Explore		
Custom Workspace: GT Nexus Documentation   What's New   My Watchlist   Blogs   Likes		
🥰 Comment	게 85 Revisions 👔 Signal This! 🔇	Watch 🖶 Print 🄯 Tools
GT Nexus Documentation		▼ HIDE
Welcome to the GT Nexus documentation! There are a number of ways to learn about the GT Nexus so		
Product User Guides	Tags	
End-user product guides that help you use the GT Nexus solutions effectively.	There are r	no tags for this page.
How To Guides	Incoming	Links
Task-oriented guides that help you perform specific tasks such as create an order, create a saved view		
Release Notes	Release No How To Gui	
Release notes to help you understand recent changes in the GT Nexus solutions.	Product Use	
Cloud Tools Documentation		



### Section 5: Notifications

#### 5. Notifications

Email notifications are an alternate way to consume information, apart from saved views for certain triggers/conditions as listed below. In other words, these are outbound email notifications which utilize "push" technology so that the users do not have to go looking every now and then, for problems. For example, the email notifications come in handy in a situation where a user would like to get notified whenever a shipment is held in customs. In such cases, email notifications can be set up to trigger emails to pre-selected parties whenever such a situation arises.

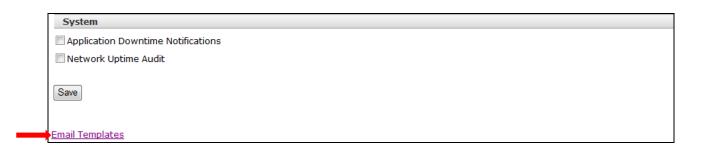
There are three ways to consume exceptions: 1. saved views, 2. email notifications, 3. dashboard.

To utilize, click the Notifications link from the User drop-down menu. The Notification Preferences screen will appear.

Order Watch®	HELP   G2/COMMUNITY   CONTA SUPPORT   -
Home Origin Operations Integration Administration	Non-producti Customer My ofile
Welcome,	Notifications
Search	Scheduled Views History
Advanced Search By Value	Log Out
B/L Instructions V B/L Number V E Search	

#### 5.1.1 Creating a Notification

Scroll to the bottom of the Notification Preferences screen and select the E-mail Templates link.



Once on the Email Templates screen, the system will display all notifications that have been created by the User or shared with the user.

To create a new notification, click the create button. Input the template name and select the notification type.

- Critical Date Exception and Informational Date Exception
   These two notification types work in sync with milestone models. While configuring models,
   you can setup exceptions based on certain tolerances. These milestone model exceptions
   trigger visual indicator (yellow and red flags) in the UI. However, if you need to be notified by
   email when these exceptions get triggered, you have to configure the corresponding email
   notification template.
- Milestone Actual email notifications can be sent for milestone actuals, i.e. irrespective of
  exceptions regarding a certain milestone, users can opt to receive notifications if a certain
  milestone has been received. That allows users to use email notifications even if no models
  have been set up.
- Milestone Alerts to get exceptions without models. It's at the user level. It's like a private
  model used to mimic a milestone model. Email notifications can be setup for Milestone Alerts.
  The user can configure a notification based on the relation between two milestones (from the
  list of available milestone events) and can also apply a date range. This is similar to Critical and
  Informational Exceptions.
- Order Acceptance Status Not applicable to all customers.

A new screen will open up, allowing the user to set the notification rules, tolerance levels. Once the settings are entered, click the Save button to save the notification.

#### 5.1.2 Editing a Notification

To edit a notification, click the edit button next to the Notification that you want to edit. The criteria screen will open up, allowing the user to change the settings and resave.

If a Notification was shared with you, you will not be able to edit it. You can create a copy of the Notification, then edit and resave under a new name.

### **NOTE:** You can then ask the creator of the original Notification to remove you from the distribution list.

			Stat	us Active
Milestones/Milestone Relations/Order Acceptance Status	Notification Types	Date Modified	Edit	Delete
5/W End Dt	Critical Date Exceptions	07/18/2012 03:06 PM PDT	Edit	Delete
est. Depature from POL should occur no later than 7 days after Carrier Booking Confirmed	Milestone Alert	07/20/2012 01:34 PM PDT	Edit	Delete
Masterbill Assigned should occur no later than 2 days after Shipped (ASN)	Milestone Alert	07/19/2012 11:45 AM PDT		

#### 5.1.3 Deleting a Notification

To delete a notification, click the delete button next to the Notification that you want to delete. The application will ask you if you are sure you want to delete. Click Ok and the Notification will be removed from the application.

If you shared the notification with someone else, they will no longer receive the notification.

NOTE: You will need to ask the creator of the Notification to remove you from the distribution list.



### Section 6: Origin Operations

#### 6. Origin Operations

#### 6.1 Purchase Orders

The Purchase Order platform in Order Watch is used to enter and maintain orders. Purchase Orders are often referred to as POA Purchase Order consists of two parts: headers and details. The PO header displays information that is applicable to the entire PO as well as some additional information about the Purchase Order.

#### 6.1.1 Creating a Purchase Order- Manual Data Entry

#### 6.1.2 Creating a Purchase Order- Spreadsheet Upload

#### 6.1.3 Accessing an existing Purchase Order

There are 2 ways to access an existing Purchase Order; use the Quick Search feature (See Section 4.2) or select the View Orders Sub Tab. The next screen will display a list of existing purchase orders.

	Order Watch®								HELP   G2/COMMUNITY   CONTACT SUPPORT   Kara				
	Home Origin Operatio	ns Inte	gration Intellig	gence	Administration								
	View Orders   Create C	Order   V	iew Shipping Or	rders	Create Shipping Order	View Receipts	View FCR	s   View Shipment Plans	Create Shipment Plan	View Draft Ma	mifesta View .	Shipments	onment
1	Search   <u>Advanced</u>	By			Value								
	Shipping Orders	<ul> <li>Purcl</li> </ul>	nase Order	-	005840702584		÷	Search					

Select the purchase order number to view the purchase order in detail.

	<u>Purchase</u> <u>Order</u>	PO Line #	Item #	<u>Department</u>	Supplier Code	Supplier	<u>PO</u> <u>Status</u>	PO Date	PO Revision	Last Modified Date(Order)	<u>Ship</u> <u>Window</u> <u>Start</u>	Ship Window End Division	Incoterm Location*	<u>PO Origin</u> (Country)*	<u>PO Origin</u> (City)*	Buver Docs
E	00171 620577	925276	<u>925276</u>	Hardware (27)	1819500	ACTIVA LEISURE	Open	06/20/2012	2	10/12/2012	04/18/2013	04/25/2013 COSTCO	QINGDAO	China	Qingdao, CN	View
	001710813463	639495	<u>639495</u>	Hardware (27)	7429400	AGIO INTERNATIONAL CO	Open	08/13/2012	1	10/12/2012	04/16/2013	04/23/2013 COSTCO	VANTIAN	China	Yantian, CN	<u>View</u>
	001710813462	639495	<u>639495</u>	Hardware (27)	7429400	AGIO INTERNATIONAL CO	Open	08/13/2012	1	10/12/2012	04/16/2013	04/23/2013 COSTCO	VANTIAN	China	Yantian, CN	<u>View</u>

#### 6.1.4 Delete/Cancel a Purchase Order

#### 6.1.5 Editing a Purchase Order

Purchase orders can be edited once the purchase order has been opened, scroll down the purchase order page and select Edit Order.

Edit Order         Copy Order         Cancel Order         View History         Accept Order         Decline Order	Help ?
Purchase Order Detail	Help ?

#### 6.1.6 Adding Comments to a Purchase Order

Comments can be added to the purchase order once the purchase order has been opened, scroll to the bottom of the purchase order page. Place your cursor inside the box and click within the white space. Enter your comments and select save comment. There is also an option to email them to a recipient.

Comments	
Add Comment	
A	
Ψ	
Save Comment Email Comments	

#### 6.1.7 View Purchase Order History

The history of a Purchase Order can be viewed when the Purchase Order is open. Scroll down the purchase order page and select View History.

Edit Order Copy Order Cancel Order View History Accept Order Decline Order	Help ?
Purchase Order Detail	Help ?

#### 6.1.8 Attaching Documents to a Purchase Order

Documents with a file size of up to 10MB can be attached to Purchase Orders.