

Custom Rules (5.4)

Custom Rules enhances the validation and override capabilities of DGIS by giving Administrators the ability to create rules that will trigger certain actions during validation. Custom Rules can be used to communicate instances where shipments could be treated as partially regulated, advise certain actions to take, and automatically perform certain actions that are aligned with a company's practice and workflow.

Custom Rules are built using When, If, and Then criteria:

Edit Custom Rule

CancelSave

Name *

Description

When

Shipment is Validated ▾

If

+ Add Criteria

+ Add OR Group

Then

Display an error on the validation screen ▾

+ Add Action

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When: The rule will always be set to trigger when the shipment is validated (clicking the Complete button).

If: Describes the conditions in the shipment that must be met to trigger the rule. The following can be added to the rule as additional criteria:

- Part number – User created Parts
- Material Profile – User created Material Profiles
- Regulation – supported regulation in DGIS
- Carrier – default or custom carrier
- Transport Mode – support transport mode in DGIS
- Limited Quantity – flag indicating Limited Quantity is or is not set
- Origin Country – Shipper Country
- Destination Country – Consignee Country
- Single Package – flag indicating Single Package is or is not set
- Inner Quantity (total) – total inner quantity set for the material; must be an integer
- Net Quantity – net quantity in the package; must be an integer
- Package Weight – package weight; must be an integer
- All Packed In One – flag indicating that materials are or are not packed in the same outer package
- Battery Cell Watt Hours - must be an integer
- Battery Watt Hours - must be an integer
- Battery Cell Content - must be an integer
- Battery Content - must be an integer
- Consignee Address – address selected from the Address Book
- Hazard Class – flagged if a shipment contains a material with the assigned hazard class

Then: Details the action that will take place when the rule is triggered. The following actions can be applied to the rule:

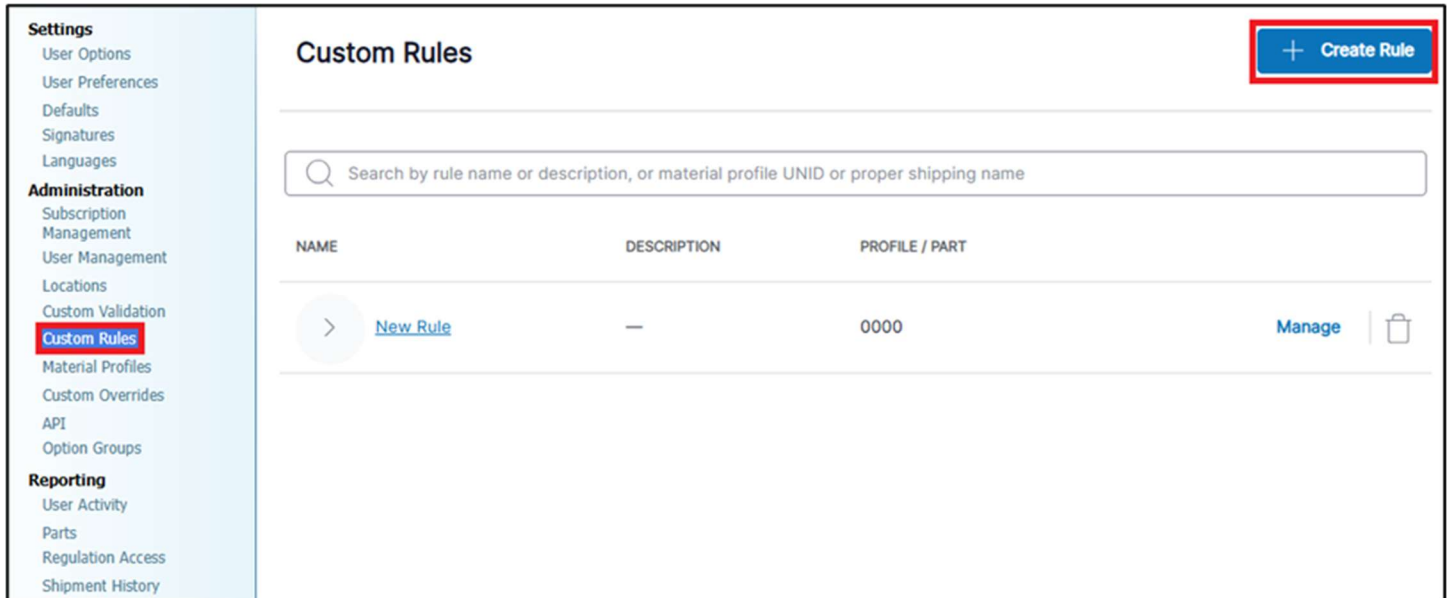
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- Display a warning on the validation screen – text will be presented to the user during validation (click Complete) along with other DGIS-generated warnings/errors. The text will be treated as a warning and will not stop the user from completing the shipment.
- Display an error on the validation screen - text will be presented to the user during validation (click Complete) along with other DGIS-generated warnings/errors. The text will be treated as an error and will stop the user from completing the shipment until the shipment is updated to not include criteria to trigger the rule.
- Populate fields in the shipment – information will be automatically added to one of the following fields when the rule is triggered:
 - Text will be added to the Additional Handling field
 - An Exemption Name and Exemption Type will be added as Authorization.
- Add a document to the shipment – a document is uploaded with a document name. This document will be associated with a shipment where the rule is triggered and will be available to print along with the shipping paper once the shipment is finalized.
- Downgrade the shipment – text will be presented to the user when finalizing the shipment (click Complete from the Current Shipment screen). Along with this text will be a message saying “Downgrade Available” which will give the user the option to accept the downgrade or continue the shipment as fully regulated:
 - Accept Downgrade – when presented this option, the shipment has met the conditions built in the custom rule to be treated as partially or non-regulated, and no shipping papers are required. If the user clicks the Accept Downgrade option, the shipment will be automatically archived to the History screen. There will always be a record of this shipment, showing with the Downgrade status, but there will be no way to print this shipment since it was downgraded (no shipping papers required). The user can click the plus sign of the shipment to view shipment details and Additional Documents. (There is an option to add a document when building the custom rule with the Downgrade the shipment action. If a document was added, the user will see it here and have the option to print it.)
 - Continue Regulated – If the user clicks this option, the shipment will be treated as fully regulated, even though it meets the downgrade criteria set in the custom rule. The user will be taken to the Print Shipment screen, where they can print the shipping paper along with the Additional Documents associated with the shipment.
- Override validation errors - text will be presented to the user during validation (click Complete) along with other DGIS-generated warnings/errors. The text will be treated as a warning along with any DGIS-generated errors and will not stop the user from completing the shipment.

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Create a new rule

1. On the Custom Rules screen under the Administration tab, click Create Rule



The screenshot shows the 'Custom Rules' interface. On the left is a sidebar with categories: Settings, Administration, and Reporting. Under 'Administration', 'Custom Rules' is highlighted. The main area is titled 'Custom Rules' and features a search bar with the placeholder text 'Search by rule name or description, or material profile UNID or proper shipping name'. Below the search bar is a table with columns: NAME, DESCRIPTION, and PROFILE / PART. A single row is visible with a right-pointing arrow icon, the text 'New Rule', a hyphen, and '0000'. To the right of this row are 'Manage' and 'trash' icons. A red box highlights the '+ Create Rule' button in the top right corner.

2. Enter a name in the Name field.



The screenshot shows the 'Edit Custom Rule' interface. The sidebar is the same as the previous screen, with 'Custom Rules' highlighted. The main area is titled 'Edit Custom Rule' and has 'Cancel' and 'Save' buttons in the top right. There are two input fields: 'Name *' and 'Description'. The 'Name *' field is highlighted with a red box. A vertical scrollbar is visible on the right side of the form.

3. In the If section, to add more criteria for the rule, click Add Criteria. This will allow the Administrator to add more conditions that must be true in order to for the rule to trigger. To add criterial where one or another condition can be met in order to trigger the rule, click Add OR Group.

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If

Part: 0000

AND

+ Add Criteria + Add OR Group

Edit

- When adding other criteria, select one of the options from the dropdown, select one of the operators, and select the desired option or enter the desired text in the available textbox.

If

Part: 0000

AND

Regulation = International Air

+ Add Criteria + Add OR Group

Edit

- In the Then section, select the desired action and add the appropriate text and documents, when applicable.

Then

Display a warning on the validation screen This is a warning

+ Add Action

- Click Save to save the custom rule.

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The screenshot shows the 'Edit Custom Rule' form. On the left is a sidebar with 'Settings' (User Options, User Preferences, Defaults, Signatures, Languages) and 'Administration' (Subscription Management, User Management, Locations, Custom Validation, Custom Rules, Material Profiles). The 'Custom Rules' item is highlighted. The main area has a title 'Edit Custom Rule' and 'Cancel'/'Save' buttons. Below is a 'Name' field with a red asterisk and a 'Description' field. The 'Name' field contains 'New Rule'.

Search Custom Rules

1. On the Custom Rules screen under the Administration tab, type in the search box to filter down to the desired Custom Rule. You can search by the rule name, description, material profile UNID, or proper shipping name.

The screenshot shows the 'Custom Rules' search interface. The sidebar is the same as the previous screenshot. The main area has a title 'Custom Rules' and a '+ Create Rule' button. Below is a search bar with a magnifying glass icon and the text 'New Rule'. Below the search bar are buttons for 'Clear all filters' and 'Search: New Rule'. Below these is a table with columns 'NAME', 'DESCRIPTION', and 'PROFILE / PART'. The table has one row with a right arrow icon, the text 'New Rule', a hyphen, and '0000'. To the right of the table are 'Manage' and a trash icon.

NAME	DESCRIPTION	PROFILE / PART
> New Rule	—	0000

Edit Custom Rule

1. On the Custom Rules screen under the Administration tab, search for the desired rule and click Manage.

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Settings

User Options

User Preferences

Defaults

Signatures

Languages

Administration

Subscription Management

User Management

Locations

Custom Validation

Custom Rules

Material Profiles

Custom Overrides

Custom Rules

Create Rule

New Rule

Clear all filters

Search: New Rule

NAME	DESCRIPTION	PROFILE / PART
> New Rule	—	0000

Manage

2. Make the appropriate changes on the Edit Custom Rule screen.
3. Click Save to save the changes to the rule.

Settings

User Options

User Preferences

Defaults

Signatures

Languages

Administration

Subscription Management

User Management

Locations

Custom Validation

Custom Rules

Material Profiles

Custom Overrides

API

Option Groups

Edit Custom Rule

Cancel

Save

Delete

Name *

New Rule

Description

Delete Custom Rule

1. On the Custom Rules screen under the Administration tab, search for the desired rule and click the icon to delete the rule.

Settings

User Options

User Preferences

Defaults

Signatures

Languages

Administration

Subscription Management

User Management

Locations

Custom Validation

Custom Rules

Material Profiles

Custom Rules

Create Rule

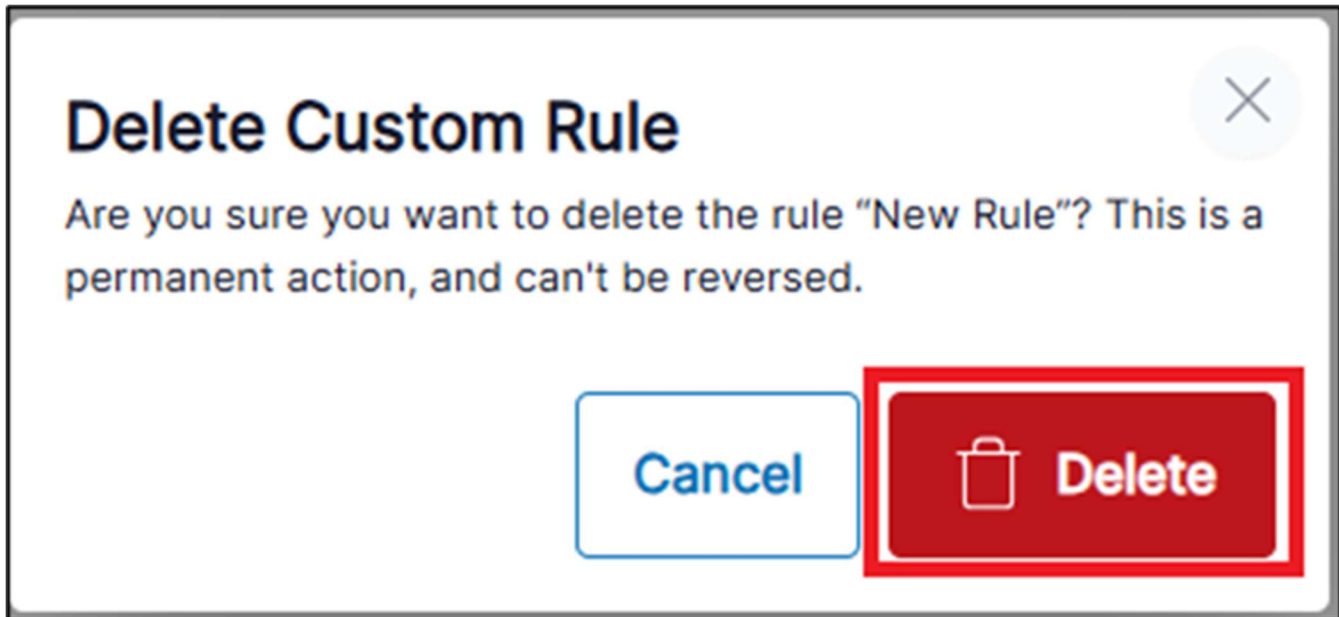
Search by rule name or description, or material profile UNID or proper shipping name

NAME	DESCRIPTION	PROFILE / PART
> New Rule	—	0000

Manage

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2. Click Delete to confirm the deletion.



3. From the Edit Custom Rule screen, you can also delete the rule by clicking Delete.

