

Material Profiles (5.4)

A Material Profile allows Admins to manage the materials used by shippers (DGIS users).

Admins will be able to setup the Material with properties (liquid, solid, technical name etc.) and once the Materials list is setup, any user in the company can select from this list when creating a shipment. These Materials can also be used in Parts and Custom Rules.

A Material Profile has a name and description and is made up of one or more Profile Entries.

To create a Material Profile (Administration Tab > Administration > Material Profiles).

1. Click Create Profile button (upper right corner).
2. Enter a name in the Name field.
3. Enter a description in the Description field (Although a description is optional we recommend entering one).
4. Click Add Regulation button.
5. Choose a Regulation from the drop down list

Tip: The Language field will ungrey only when TDG or ADR is selected as the Regulation.

- The Language choices for TDG are English, and French.

- The Language choices for ADR are English, French, Spanish, German, Dutch, and Swedish.

A checkbox is used to select the Languages that you want to include.

6. Choose either 'Proper Shipping Name' or 'UNID' and begin typing in the field to the right.



The image shows a user interface element for selecting a UNID. It consists of a dropdown menu on the left with the word 'UNID' and a downward arrow. To the right of the dropdown is a search bar with a magnifying glass icon and the text 'Search for a UNID'.

7. Click the Select button to choose a material.
8. The next screen shows the following fields; Other Required Information, Technical Name, and checkboxes.
(By entering any information in the Other Required Information field, the Technical Name field and/or putting a checkmark in a checkbox will modify the material's base Material sequence, UNID, PSN, Hazard Class, PG).

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Other Required Information

Technical Name

- ☐ Liquid ☐ Solid ☐ Solution ☐ Molten ☐ Mixture
- ☐ Stabilized ☐ Marine Pollutant ☐ Elevated Temperature ☐ Reportable Quantity

Tip: You can click the Edit button located at the top left part to return to the previous screen.

9. Click Save and the following message appears:

Copy to Other Regulations

Would you like to copy the material and properties entered here into new entries for other regulations?

Dismiss

Copy

10. Click Dismiss or Copy.

- If you click Dismiss, you'll be taken back to the Create Material Profile screen.
- If you click Copy, the Copy Multiple Entries window will appear in the foreground. At this window, you must select a Regulation (You can select more than one regulation).

Tip: If DGIS is unable to copy a material, the reason is because there is more than one material that has the same UNID but has a different PSN (Proper Shipping Name). You must click the Edit icon and a list of materials will appear. Select the appropriate material and click Save. You will not be able to Save your Material Profile unless every Regulation has a material selected.

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Regulation	Material Name	Other Required Information	Technical Name	Properties
	<div>The material can't be found. Please re-select the material.</div>	—	—	 

Once all your copied Regulations has a material a Successful message will appear at the top. Click 'X' to close the message or you can wait 5 seconds and the message will disappear.

The title page now says ‘Material Profile Details’ and lists the Name and Description of the Material Profile that you created.

There are three tabs located directly underneath the Material Profile Name and Description. They are the Entries tab, Parts tab, and Custom Rules tab.

Name

Description

—

Entries (3)

Parts (0)

Custom Rules (0)

Regulation	Material Name	Technical Name	Other Required Information	Properties
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The number next to Entries is the number of Regulations that you've selected for this material.

The number next to Parts is the number of Parts that you've linked to the Material Profile.

The number next to Custom Rules is the number of Custom Rules that you've linked to the Material Profile.

Note: The Entries tab, Parts tab, and Custom Rules tab also appears on the Material Profiles main screen as a Column header. The Column headers are Name, Description, Entry Count, Custom Rule Count, and Part Count.

11. Click the left arrow to return to the Material Profiles screen.

 **Material Profile Details**

You're taken back to the beginning page of the Material Profiles screen and the newly created Material Profile is visible with a Manage and Delete button located to the right.

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Tip: Material Profiles are listed alphabetically based on the Material Profile name and cannot be rearranged. You can search for a Material Profile by entering the partial Name of the Material Profile, or a partial Description, or the UNID. Clicking Clear All filters will reset your search.

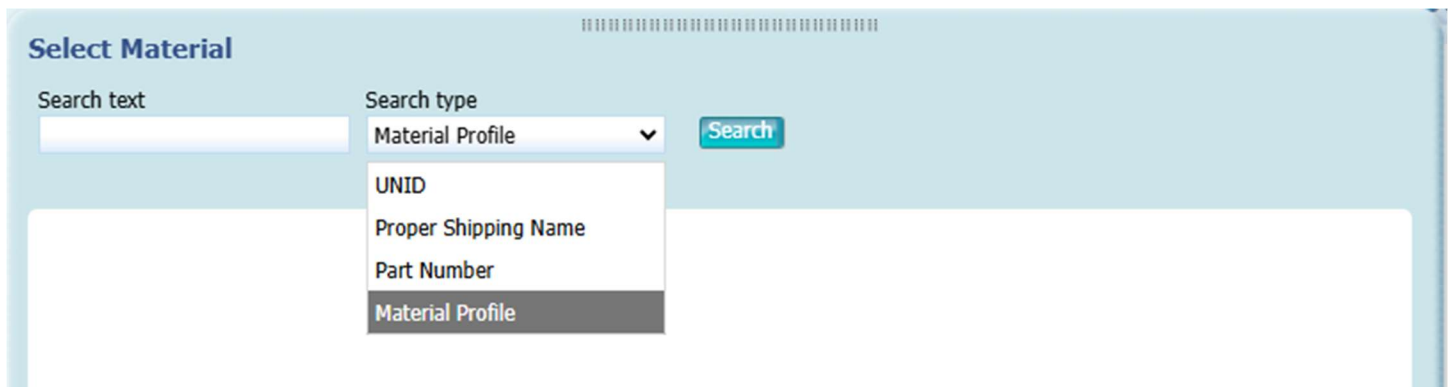
To edit a Material Profile (Administration Tab > Administration > Material Profiles).

1. You can either click on the Material Profile Name or 'Manage'.
2. Click the Edit icon.
3. Make your desired changes to the material properties (i.e. the other Required Information field, the Technical Name, and checkboxes). You can also select an entirely different material by clicking on the Edit button located under the Material name at the top.
4. Click Save (bottom right corner).
5. Click Save (top right corner).
6. Click left-arrow to return to the Material Profiles screen.

Material Profile usage:

Shipping forms

When adding a material to a shipping form, a new "Material Profile" option will appear in the Search Type field.



The screenshot shows a web form titled "Select Material". It has a "Search text" input field, a "Search type" dropdown menu, and a "Search" button. The dropdown menu is open, showing options: "Material Profile", "UNID", "Proper Shipping Name", "Part Number", and "Material Profile" (highlighted). The "Search" button is a blue button with white text.

Parts

When adding a material to a Part, a new "Link Profile" button is visible. Clicking this button brings up the Link Material Profile window to the foreground and a list of Material Profile Names will appear for you to choose from.



The screenshot shows a web interface with a "Materials" section. At the bottom right, there are two buttons: "Link Profile" and "Add Material". The "Link Profile" button is highlighted with a red rectangular box.

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Custom Rules

When creating a Custom Rule, you can select a Material Profile or a Part for an "If" statement.



The image shows a rectangular box with a red border. Inside the box, the word "If" is at the top left. Below it, there are two blue links: "+ Add Criteria" and "+ Add OR Group".

Note: If a Material Profile is associated with a Part or Custom Rule, the following message will appear when you hover your cursor over the Delete button.



The image shows a navigation bar with links: Home, Parts, Shipping Papers, Administration (highlighted), and Help. Below the navigation bar, on the left, is a back arrow and the text "Material Profile Details". On the right, there is a dark blue tooltip box with white text that reads: "This Material Profile is associated with one or more Custom Rules or Parts and cannot be deleted until it is removed from them." To the right of the tooltip is a red button with a trash icon and the text "Delete".

The Material Profile can only be deleted after you have un-associated the Material Profile from the Part or Custom Rule.

End of article.