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# Ultriva 7.6 and Higher Setting up Shipping Rules Reference Guide

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## Setting up Ship Rules – Specific Days of the Week



**Quick Tip** – Generally it is best to include the lead time in the shipping rules so the supplier has time to process the orders.

When including the lead time – the rule will state “If the Release Time is on or before... it actually means Release Time + Lead Time”

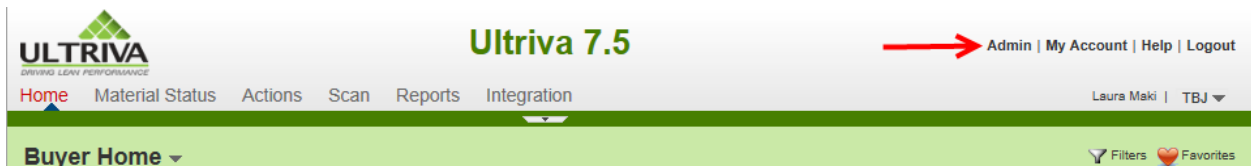
If shipments have been selected for a Saturday or Sunday, make sure in the Calendar that the days are not set to a non-work day. By default, Saturday and Sunday are considered a Non-Work Day in Ultriva.



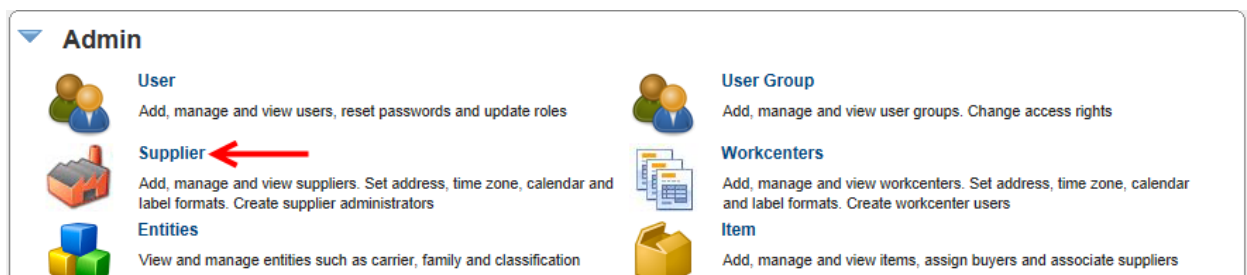
**Important** - Every hour of every day must be accounted for. There can be no overlap of hours or days. The rules will be evaluated in the order shown on the screen. The week starts on Sunday at midnight/00:00. That is when the rule should be started.

Based on how the rule is set up, how often product is received, the consumption patterns and any delays in the process must be covered with the safety stock to assure a more accurate loop size calculation.

To navigate to “Setting up Shipping Rules”, click on “Admin”.



Click on “Supplier”



Type in the **supplier name** and **click** on the “**Binoculars**”



*Quick Tip – Clicking on the binoculars will search for what has been entered.*

External Supplier List for TBJ

Filter By [ ] Select Operator [ ] Enter Value [ ] [Go] [ ]

LJM [x] [Binoculars] [Binoculars] ←

[Add] [Edit] [View] [More Options]

The **supplier appears** and will be **highlighted**. **Click** on the **drop down arrow** by the “**More Options**” button.

External Supplier List for TBJ

Filter By [ ] Select Operator [ ] Enter Value [ ] [Go] [ ]

ljm [Binoculars] [Binoculars]

[Add] [Edit] [View] [More Options] ↓

External Supplier Internal Supplier

Name ▲	Location ▾	Code ▾
Lio Chem	CONYERS	50820
LIOCHEM INC	CONYERS	1086
LJM Machining Supplies	Thorofare, New Jersey	73750

Click on “**Shipping Rules**”

[Add] [Edit] [View] [More Options] ↓

External Supplier Internal Supplier

- Configuration
- Associate Supplier
- Users
- Shipping Rules ←
- Calendar
- Attachment
- Inventory

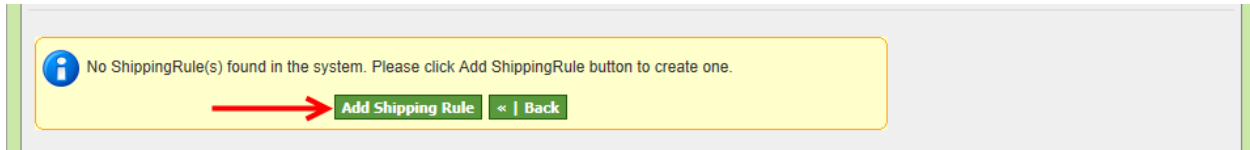
Name ▲	Location ▾	Code ▾
Lio Chem	CONYERS	50820
LIOCHEM INC	CONYERS	1086
LJM Machining Supplies	Thorofare, New Jersey	73750



**Quick Tip** – A rule of thumb is the  $N+1$  rule, where  $N$  equals each day a supplier is shipping per week. For this example being created, the supplier ships in one day, therefore 1 and the  $+1$  ( $N+1$ ) = 2 ship rules.

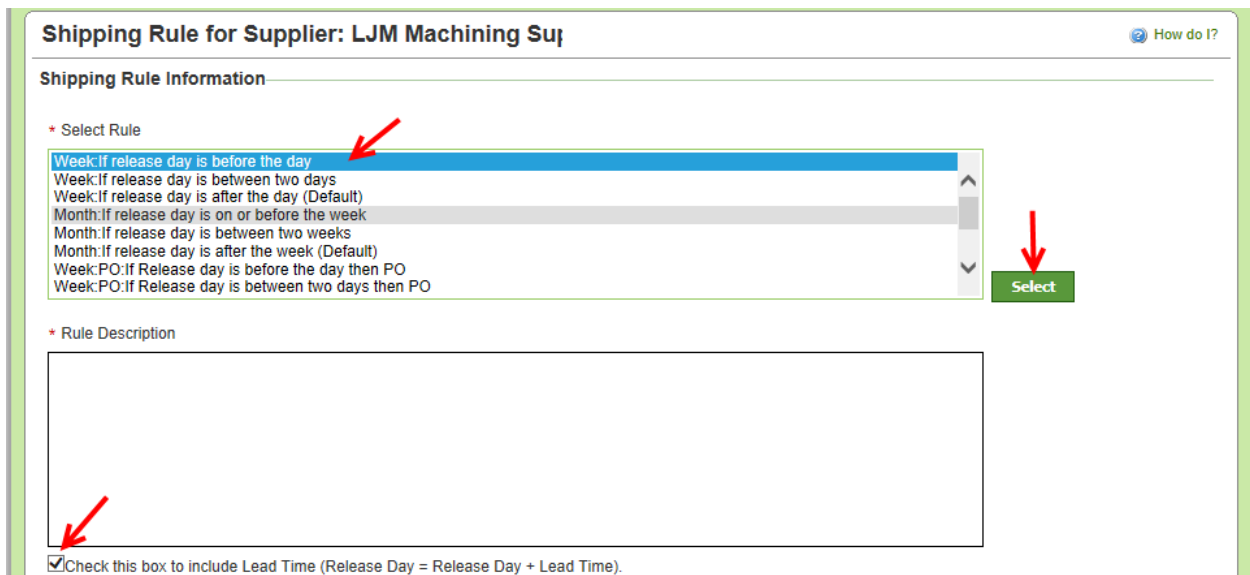
These rules will be for a supplier shipping one day a week, every Thursday.

Click on the “Add Shipping Rule” button

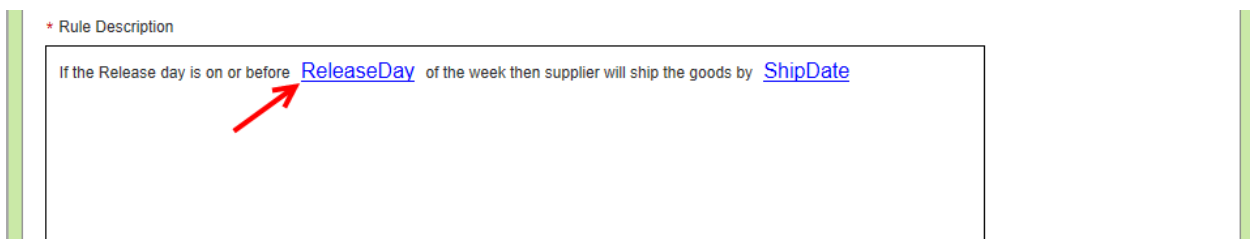


Click on “Week: If release day is before the day” and click on the “Select” button.

Make sure the box is checked if you are including the Lead Time.



The rule appears. Click on “[ReleaseDay](#)”



Click on the **drop down arrow** in the “Released Before” field. Select the “Day and Time”. The time is Military time, 24 hrs. Click on the “Apply” button.

Enter Value

Released Before: Wednesday 18:00 (HH:MM)

Apply Cancel

The **day and time** has now been placed into the rule. Click on “[ShipDate](#)”

\* Rule Description

If the Release day is on or before [Wednesday 18:00](#) of the week then supplier will ship the goods by [ShipDate](#)

Check this box to include Lead Time (Release Day = Release Day + Lead Time).

Select the “Shipment Week”, the “Shipment Day” and the “Shipment Time”. Click on the “Apply” button.

Enter Value

1. Select the Shipment Week Same Week

2. Select the Shipment Day Thursday

3. Enter Ship Time 18:00 (HH:MM)

Apply Cancel

The **Week/Day/Time** has now been placed in the rule. Click on the “Save” button

\* Rule Description

If the Release day is on or before [Wednesday 18:00](#) of the week then supplier will ship the goods by [Same Week Thursday 18:00](#)

Check this box to include Lead Time (Release Day = Release Day + Lead Time).

Save | > X | Cancel

The **first rule** has been **added successfully**.

*The Lead Time is included. (Release Day = Release Day+ Lead Time).*

Shipping Rule for Supplier: LJM Machining Supplies

Shipping Rule added Successfully

Add Delete Move Up Move Down Back

Schedule Condition

If the Release day is on or before Wednesday 18:00 of the week then supplier will ship the goods by Same Week Thursday 18:00

These rules include the Lead Time (Release Day = Release Day + Lead Time)

Create rule # 2. Click on the “Add” button.

Shipping Rule for Supplier: LJM Machining Supplies

Shipping Rule added Successfully

Add Delete Move Up Move Down Back

Schedule Condition

If the Release day is on or before Wednesday 18:00 of the week then supplier will ship the goods by Same Week Thursday 18:00

These rules include the Lead Time (Release Day = Release Day + Lead Time)

**!** *Important - Adding the 1<sup>st</sup> rule captured what happens before Wed. 18:00. The 2<sup>nd</sup> rule (N+1) must capture what happens after Wed 18:00 (to capture the entire week)*

Click on “Week: If release day is after the day” (Default). Click on the “Select” button. Make sure the box is checked if you are including the Lead Time.

Shipping Rule for Supplier: LJM Machining Sup

Shipping Rule Information

\* Select Rule

Week: If release day is before the day  
Week: If release day is between two days  
Week: If release day is after the day (Default)  
Month: If release day is on or before the week  
Month: If release day is between two weeks  
Month: If release day is after the week (Default)  
Week: PO: If Release day is before the day then PO  
Week: PO: If Release day is between two days then PO

\* Rule Description

Check this box to include Lead Time (Release Day = Release Day + Lead Time).

Click on "[ReleaseDay](#)"

\* Rule Description

If Release day is after [ReleaseDay](#) of the week then supplier will ship the goods by [ShipDate](#)

Check this box to include Lead Time (Release Day = Release Day + Lead Time).

Select the Released After "Day" (per the example it would be after Wednesday). Select the "Time". Click on the "Apply" button.

Enter Value

Released After:  (HH:MM)  (HH:MM)

The day and time is has now been placed into the rule. Click on "[ShipDate](#)"

\* Rule Description

If Release day is after [Wednesday 18:00](#) of the week then supplier will ship the goods by [ShipDate](#)

Check this box to include Lead Time (Release Day = Release Day + Lead Time).

Select the "Shipment Week", the "Shipment Day" and the "Shipment Time". Click on the "Apply" button.

Enter Value

1. Select the Shipment Week  (HH:MM)

2. Select the Shipment Day  (HH:MM)

3. Enter Ship Time  (HH:MM)



The **Week/Day/Time** has now been placed into the rule. Click on the “Save” button

\* Rule Description

If Release day is after [Wednesday 18:00](#) of the week then supplier will ship the goods by [Next Week Thursday 18:00](#)

Check this box to include Lead Time (Release Day = Release Day + Lead Time).

[Save](#) | [X](#) | [Cancel](#)

The **rules** are now **complete**.

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### Shipping Rule for Supplier: LJM Machining Supplies

How do I?

**Shipping Rule added Successfully**

[Add](#) [Delete](#) [Move Up](#) [Move Down](#) [Back](#)

These rules include the Lead Time (Release Day = Release Day + Lead Time)

**Schedule Condition**

If the Release day is on or before Wednesday 18:00 of the week then supplier will ship the goods by Same Week Thursday 18:00

If Release day is after Wednesday 18:00 of the week then supplier will ship the goods by Next Week Thursday 18:00

1 to 2 of 2

**!** *Important – When first setting up the Shipping Rules, setting them up in Ultriva Test will allow testing of the rules prior to being turned on in Production.*

## Setting up Ship Rules – Ship Every “N” Days



*Quick Tip – Generally it is best to include the lead time so the supplier has time to process the orders.*

*This rule is an exception to the N+1 rule when Fixed Days Ships Every <X> days is chosen for the rule.*

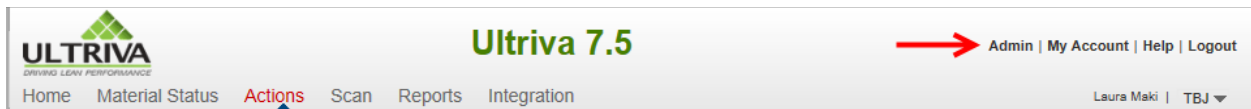
*Example would be to ship every 14 days or every other week.*

*If you have selected shipments for a Saturday or Sunday, make sure in the Calendar that the days are not set to a non-work day. By default, Saturday and Sunday are considered a Non-Work Day in Ultriva.*

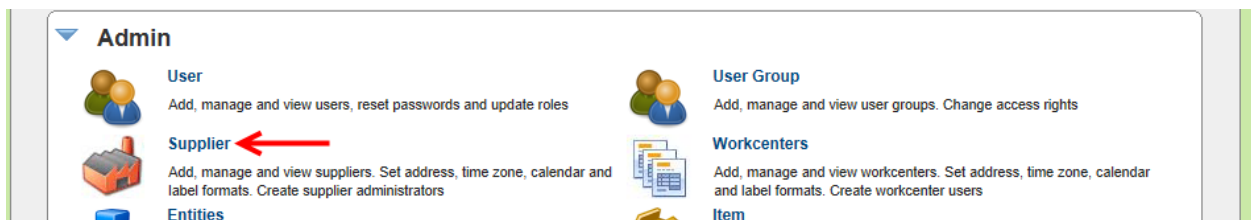


*Important - Based on how the rule is set up, how often product is received, the consumption patterns and any delays in the process must be covered with the safety stock to assure a more accurate loop size calculation.*

To navigate to “Setting up Shipping Rules”, click on “Admin”.



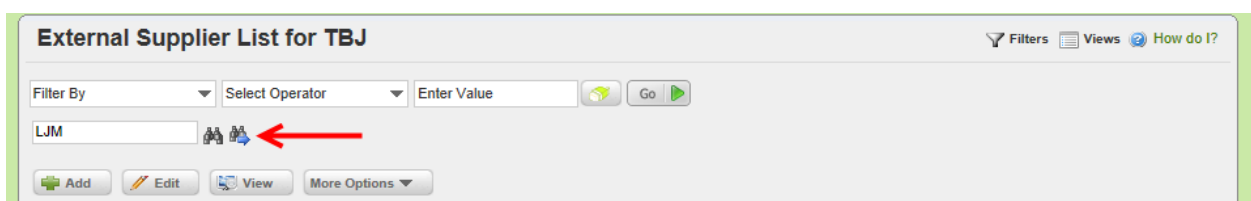
Click on “Supplier”.



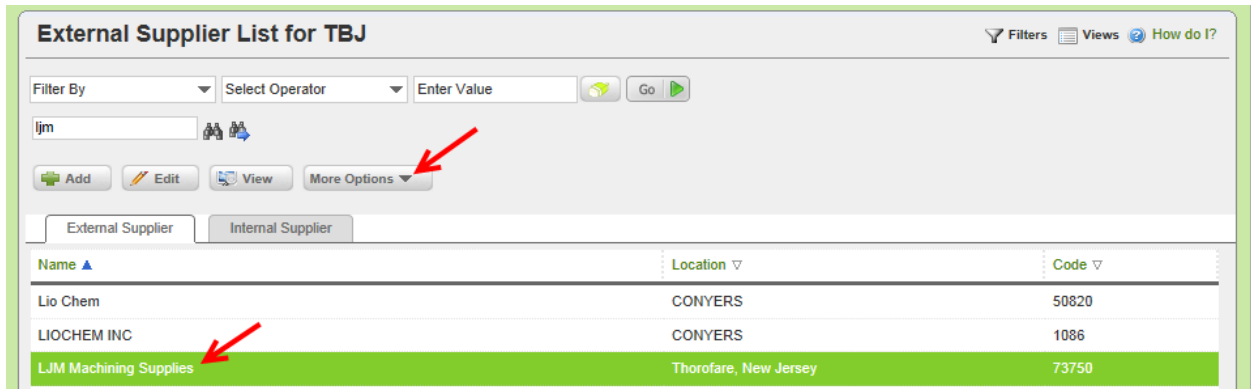
Type in the **supplier name** and click on the “Binoculars”



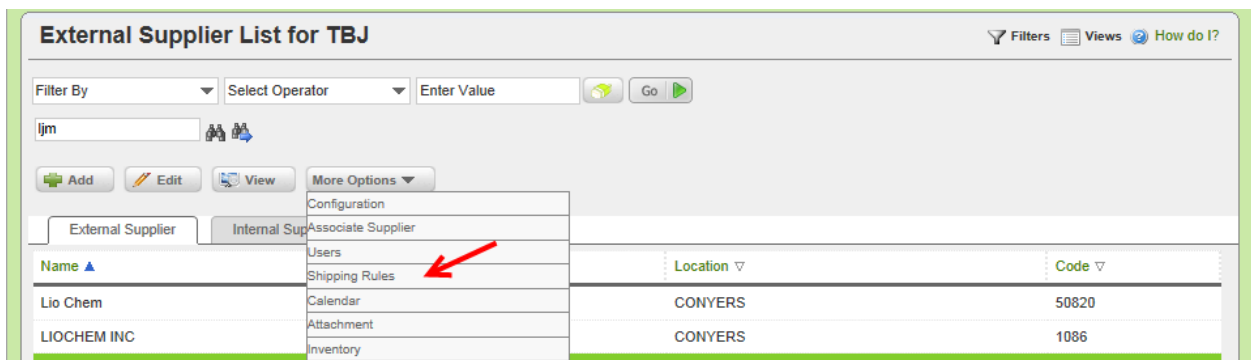
*Quick Tip – Clicking on the binoculars will search for what has been entered (filtered).*



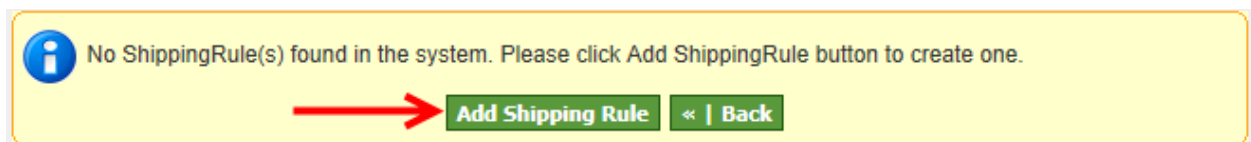
The **supplier** you searched for **will now be highlighted**. Click on the **drop down arrow** by “**More Options**”.



Click on “**Shipping Rules**”



Click on the “**Add Shipping Rule**” button.





**Important – These rules will be for a supplier who is set up to ship “every <X> number of days”.**

Select “**Fixed Days Ships Every <X> Days**”. (You may need to click on the drop down arrow as this is the last selection in the list of rules). *Make sure the box is checked if you are including the Lead Time.* Click on the “**Select**” button

**Shipping Rule for Supplier: LJM Machining Sup** How do I?

**Shipping Rule Information**

\* Select Rule

- Month:If release day is after the week (Default)
- Week:PO:If Release day is before the day then PO
- Week:PO:If Release day is between two days then PO
- Week:PO:If Release day is after the day then PO (Default)
- Month:PO:If Release day is before the week then PO
- Month:PO:If release day is between two weeks then PO
- Month:PO:If release day is after the week then PO(Default)
- Fixed Days:Ships Every <X> days

\* Rule Description

Check this box to include Lead Time (Release Day = Release Day + Lead Time).

Click on “[ShipDate](#)”.

**Shipping Rule for Supplier: LJM Machining Sup** How do I?

**Shipping Rule Information**

\* Select Rule

- Month:If release day is after the week (Default)
- Week:PO:If Release day is before the day then PO
- Week:PO:If Release day is between two days then PO
- Week:PO:If Release day is after the day then PO (Default)
- Month:PO:If Release day is before the week then PO
- Month:PO:If release day is between two weeks then PO
- Month:PO:If release day is after the week then PO(Default)
- Fixed Days:Ships Every <X> days

\* Rule Description

Ships from [ShipDate](#) every X days

Check this box to include Lead Time (Release Day = Release Day + Lead Time).

Click in the “Previous Ship Date” field and a calendar will appear. Click on the “Date” the parts were last shipped.

Enter Value

1. Previous Ship Date

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Today

The date is now populated. Click on the “Apply” button.

Enter Value

1. Previous Ship Date 12/03/2013

Apply Cancel

The date has been placed into the rule. Click on the “X” to select the number of days

Ships from 12/03/2013 every X days

Check this box to include Lead Time (Release Day = Release Day + Lead Time).

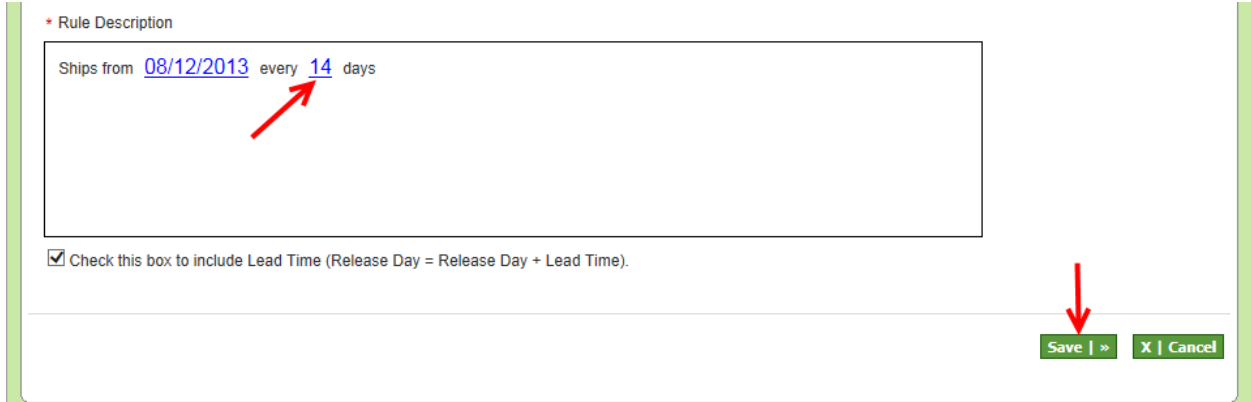
Enter the number of days in the “Enter Days” field. Click on the “Apply” button.

Enter Value

1. Enter Days 14

Apply Cancel

The days have been populated. Click on the “Save” button



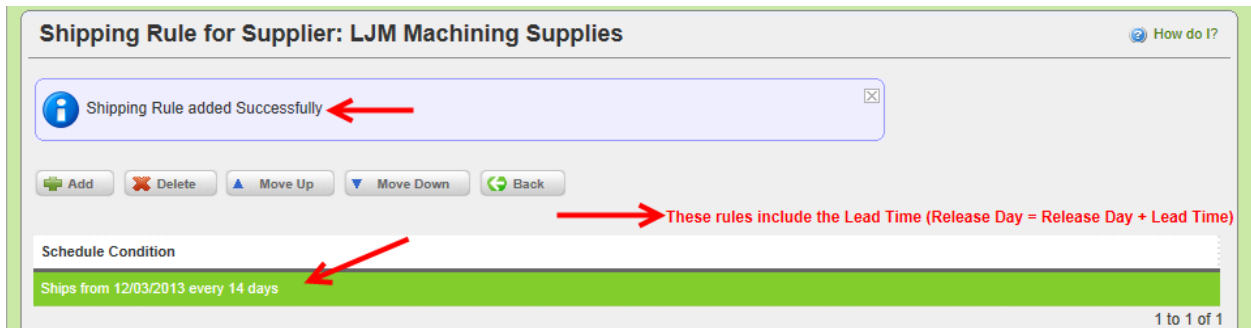
\* Rule Description

Ships from 08/12/2013 every 14 days

Check this box to include Lead Time (Release Day = Release Day + Lead Time).

Save | X | Cancel

The rule has been saved.



Shipping Rule for Supplier: LJM Machining Supplies

Shipping Rule added Successfully

Add Delete Move Up Move Down Back

These rules include the Lead Time (Release Day = Release Day + Lead Time)

Schedule Condition

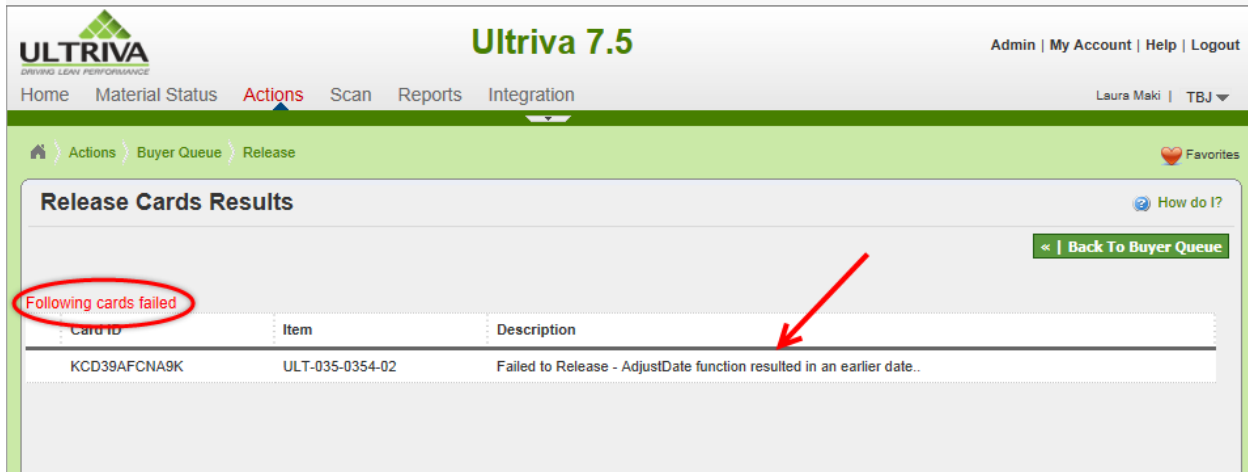
Ships from 12/03/2013 every 14 days

1 to 1 of 1

 **Important** – When first setting up the Shipping Rules, setting them up in Ultriva Test will allow testing of the rules prior to being turned on in Production.

## Shipping Rule with an Error

If an error message appears when releasing a card, stating the “following cards failed” the ship rule has been set up incorrectly. The ship rule must be corrected before the cards will “release” successfully. See below.

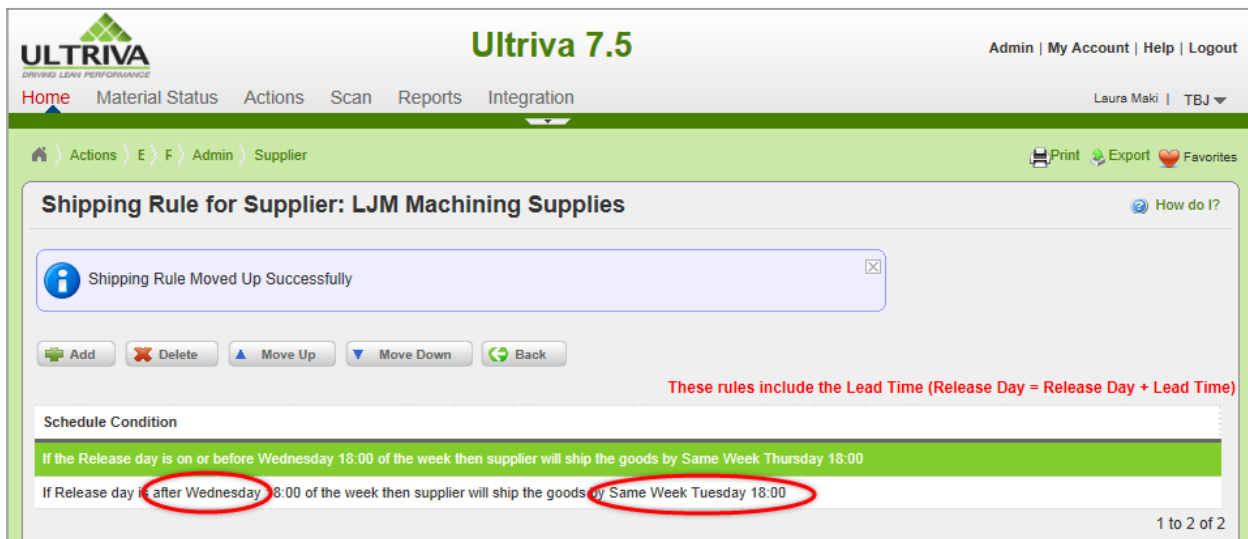


The screenshot shows the Ultriva 7.5 interface. The top navigation bar includes 'Home', 'Material Status', 'Actions', 'Scan', 'Reports', and 'Integration'. The user is logged in as 'Laura Maki | TBJ'. The breadcrumb trail is 'Actions > Buyer Queue > Release'. The main heading is 'Release Cards Results'. A red circle highlights the message 'Following cards failed'. Below it is a table with the following data:

Card ID	Item	Description
KCD39AFCNA9K	ULT-035-0354-02	Failed to Release - AdjustDate function resulted in an earlier date..

A red arrow points to the description cell in the table. A 'Back To Buyer Queue' button is visible in the top right of the results area.

The error here is that the rule stated that anything released after Wednesday would be shipped the same week Tuesday. Since Tuesday comes before Wednesday the error will appear. See the correct rule on the next page.



The screenshot shows the Ultriva 7.5 interface for editing a shipping rule for 'LJM Machining Supplies'. A message box at the top says 'Shipping Rule Moved Up Successfully'. Below are buttons for 'Add', 'Delete', 'Move Up', 'Move Down', and 'Back'. A red note states: 'These rules include the Lead Time (Release Day = Release Day + Lead Time)'. The 'Schedule Condition' section contains two rules:

- If the Release day is on or before Wednesday 18:00 of the week then supplier will ship the goods by Same Week Thursday 18:00
- If Release day is after Wednesday 18:00 of the week then supplier will ship the goods by Same Week Tuesday 18:00

The second rule is circled in red. The page number '1 to 2 of 2' is shown at the bottom right.

The correct “Ship Rule” is below for the “Supplier who will ship every Thursday”.

These rules include the Lead Time (Release Day = Release Day + Lead Time)

Schedule Condition

If the Release day is on or before Wednesday 18:00 of the week then supplier will ship the goods by Same Week Thursday 18:00

If Release day is after Wednesday 18:00 of the week then supplier will ship the goods by Next Week Thursday 18:00

1 to 2 of 2



## Changing the Order of the Ship Rules



*Important - Every hour of every day must be accounted for. There can be no overlap of hours or days. The rules will be evaluated in the order shown on the screen. The week starts on Sunday at 00:00. That is when the rule will be started. When making any changes to the rules, the order may need to be changed as the new rule will be populated at the bottom in the list.*

To change the order in the list of rules, **highlight the rule** for which you want to **move**. Select the “**Move Up or Move Down**” buttons. The rule will move accordingly.

The screenshot displays the Ultriva 7.5 web application interface. At the top, the logo for ULTRIVA is on the left, and the text "Ultriva 7.5" is in the center. On the right, there are links for "Admin | My Account | Help | Logout" and a user profile for "Laura Maki | TBJ". Below the header is a navigation menu with "Home", "Material Status", "Actions", "Scan", "Reports", and "Integration". On the right side of the page, there are icons for "Print", "Export", and "Favorites".

The main content area is titled "Shipping Rule for Supplier: LJM Machining Supplies" and includes a "How do I?" link. Below the title are several action buttons: "Add", "Delete", "Move Up", "Move Down", and "Back". Two red arrows point from the "Move Up" and "Move Down" buttons to the list of rules below. A red text note states: "These rules include the Lead Time (Release Day = Release Day + Lead Time)".

The "Schedule Condition" section contains two rules:

- If the Release day is on or before Wednesday 18:00 of the week then supplier will ship the goods by Same Week Thursday 18:00
- If Release day is after Wednesday 18:00 of the week then supplier will ship the goods by Next Week Thursday 18:00

The second rule is highlighted in green. At the bottom right of the rule list, it says "1 to 2 of 2".