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# Collaborative Demand Portal (CDP)

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Process Flow driven User  
Guide

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Version 7.0  
January 2012

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# User Guide for Collaborative Demand Portal (CDP)

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## Base Functionality

CDP provides functionality to manage a company's customers. It provides a collaborative Demand Portal for the plants and its customers to interact in real time. Through the portal all the players in the demand chain will get full visibility in to:

- Sales Orders
- Shipments
- Receipts
- Inventory
- Metrics
- KPI
- Notifications

The portal supports consumption driven replenishment model with the customers. The main focus of this portal is for the plants to get demand signals when their customers use their goods. Secondly plants wish to get visibility in to their customer's on hand inventory, risk of the customers running out of parts and real time metrics.

At the same time Customers will get better visibility in to where their orders are, notifications on late and short shipments, real time risk of stocking outs and analysis of inventory sizing.

The portal will help build trust between the plants and their customers and ultimately reduce the overall inventory in the chain while increasing the inventory velocity.

## Setting up a plant

This is the first step in starting the deployment of CDP. This task is normally performed by Ultriva consultant.

### Admin

 <b>Plant</b> Add, manage and view plants. Set address, time zone, calendar and label formats. Create plant administrators	 <b>Supplier</b> Add, manage and view suppliers. Set address, time zone, calendar and label formats. Create supplier administrators
 <b>Customer</b> Add, manage and view customers. Set address, time zone, calendar and label formats. Create customer administrators	 <b>User Group</b> Add, manage and view user groups, change access rights
 <b>Rules</b> Add, manage and view Alerts. Subscribe to Alerts for missed shipments, late receipts, order acknowledgements, and stock outs	 <b>Cache Monitor</b> View and manage cache objects
 <b>Kanban Label</b> Add, manage and view labels	

### Edit Plant Plant One

How do I?

#### Plant Information

\* Name:  \* Location:   
\* Code:  \* Label:    
\* Timezone:   
Weekly Holiday:  Sun  Mon  Tue  Wed  Thu  Fri  Sat

#### License Information

\* License Key:

#### Address Information

\* Street1:  Street2:   
Street3:  \* City:   
\* State:  \* Zip:   
\* Country:

#### Security Policy Information

\* Password Settings:  

\* Required field

Strong: Every 90 Days Password should be changed. Minimum Length: 8 Characters with at least 1 upper case alpha, 1 lower case alpha, 1 numeric and 1 special character. Medium: Every 90 Days Password should be changed. Minimum Length: 6 characters with at least 1 alpha and 1 numeric character. Weak: Minimum Length: 6 characters

Save | >> X | Cancel

While creating the plant there are few defaults that could be set:

- The time zone
- # of working days
- Security policy. Ultriva supports three levels of passwords. Strong, Medium and Weak. Once set at the plant level this will be enforced for every user.
  - o Strong
    - Every 90 days password should be changed
    - Minimum length: 8 Characters

- Password should contain: 1 upper case alpha, 1 lower case alpha, 1 numeric and 1 special character
  - Medium
    - Every 90 days password should be changed
    - Minimum length: 6 Characters
    - Password should contain: 1 alpha and 1 numeric characters
  - Weak
    - Minimum length: 6 Characters

**Note:** CDP can also be set up by adding this module to an existing plant running CSP through a change in license key. This helps the customers to get one holistic view of supplier and customer management in a single portal.

As the plant is set up an overall administrator is also created. This user could be a system administrator, an App Administrator or a Plant Administrator.

The responsibility of the administrator is to create role based users – primarily customer service people to start with and then follow up with Planners/Schedulers, Warehouse personnel and other related roles.

## Creating Customers

Ultriva allows plants to create customers either at the system level and associate with the plant or directly create at the plant level. To create a customer

- Login to the application as an App Admin or Plant Admin
- Click on the ADMIN menu at the top
- Open the Customer Admin panel as shown below

The screenshot displays the Ultriva Lean Suite (Dev Site) Admin interface. At the top, the logo 'ULTRIVA DRIVING LEAN PERFORMANCE' is on the left, and 'Ultriva Lean Suite (Dev Site)' is in the center. On the right, there are links for 'Admin | My Account | Help | Logout'. Below the header, a navigation bar includes 'Home', 'Material Status', 'Actions', 'Scan', 'Reports', and 'Integration'. The main content area is titled 'Admin' and contains a 'Customer Admin' section. This section has two main items: 'Customer' (with a factory icon) and 'Item' (with a box icon). The 'Customer' item description reads: 'Add, manage and view customers. Set address, time zone, calendar and label formats. Create customer administrators'. The 'Item' item description reads: 'Add, manage and view customer items'. There is also a 'How do I?' link in the top right of the Admin panel.

## Adding a customer

- Click on Customer from the above panel
- If you are creating a first customer then it will start with Add customer button

- If you already have created customers then the following list will be shown

The screenshot shows the Ultriva Lean Suite (Dev Site) interface. At the top, there is a navigation bar with the Ultriva logo, the title "Ultriva Lean Suite (Dev Site)", and user options: "Admin | My Account | Help | Logout". Below this is a secondary navigation bar with "Home", "Material Status", "Actions", "Scan", "Reports", and "Integration". The main content area is titled "Customer List" and includes a breadcrumb "Admin > Customer". On the right, there are icons for "Print", "Export", and "Favorites". The "Customer List" section features a search bar with "Filter By", "Select Operator", and "Enter Value" fields, along with "Go" and "Find Name" buttons. Below the search bar are "Add", "Edit", "View Details", and "More Options" buttons. A table displays customer information with columns for "Name", "Location", and "Code". The table contains two entries: "Acme Customer" (San Jose, ACM) and "Dell Comp" (Austin, Dell-10890). The table is sorted by "Name" and shows "1 to 2 of 2" items.

Name ▲	Location ▼	Code ▼
Acme Customer	San Jose	ACM
Dell Comp	Austin	Dell-10890

You can either add a new customer by clicking ADD button on the top. You can also select an existing customer and edit the information by clicking on the EDIT button above.

The screen below shows the information to be entered for creating a customer.

- Enter Name
- Enter Location
- Enter Customer Code
- Select Label format
- Select Time Zone
- Enter customer's address
- Click Save

### Modify Customer Dell Comp How do I?

**Busunit Information**

\* Name:  \* Location:

\* Code:  \* Label Format:

\* Time zone:

Weekly Holiday:  Sun  Mon  Tue  Wed  Thu  Fri  Sat

**Address Information**

\* Address 1:  Address 2:

Address 3:  \* City:

\* State/Province:  Zip/Postal Code:

\* Country:

\* Required field

## Creating an Item

After creating a customer, the next step is to associate the Finished Goods parts to one or more customers. For plants that are already using Ultriva to manage finished goods, it is a matter of just associating them to the respective customer(s).

To do so:

- Login to the application as an App Admin or Plant Admin
- Click on the ADMIN menu at the top
- Open the Customer Admin panel as shown below

**ULTRIVA** Admin | My Account | Help | Logout

**Ultriva Lean Suite (Dev Site)**

Home | Material Status | Actions | Scan | Reports | Integration Ultriva User | InSinkErator

**Admin** How do I?

**Admin**

**Customer Admin**

**Customer**  
Add, manage and view customers. Set address, time zone, calendar and label formats. Create customer administrators

**Item**  
Add, manage and view customer items

## Associating an Item

- Click on Item
- The following list will be displayed if there are existing supplier items

- Select an Item
- Click on More Options button on top
- Select "Associate Customer" sub menu

**Items List** Filters Views How do I?

Filter By  Select Operator  Enter Value

Find Item

00.0% Kanban

Item ▲	Description ▼	Card ▼	Product Line ▼	Commodity Code ▼
01344	WIRE, MAG ALUM 16 1/2GA	1,200	Unknown	Mag Wire
01413	WIRE, MAG ALUM 21GA	400	Unknown	Mag Wire
01502	WIRE, 26GA MAG CU	1,250	Unknown	Mag Wire
01543	WIRE, 17 1/2GA MAG ALUM	1,200	Unknown	Mag Wire
01853	WIRE, MAG AL 18 GA	1,200	Unknown	Mag Wire
01917	Label, Cord Assy 2.38 Dia	2,000	Unknown	Label and Decals
01988	COPPER MAGNET WIRE 17-1/2	1,250	Unknown	Mag Wire
02091	COPPER MAGNET WIRE 21 GA.	1,250	Unknown	Mag Wire
04853	Label, Plug/Cord CSA Eng/FR	1,000	Unknown	Label and Decals
05696	WIRE, CU MAG 20 GA	1,250	Unknown	Mag Wire

Sorted by: Item 1 to 10 of 147  Page 1

If the item is not mapped to any customer, the following screen will be displayed. Click Add Associate Customer Item to perform the association.

**Customer Association for Item 01917** How do I?

**i** No AssociateCustomerItem(s) found in the system. Please click Add AssociateCustomerItem button to create one.

The following screen will be displayed to establish all the parameters for that customer loop:

- Item Number and Item Description will be automatically populated
- Customer Item, Customer Item Description, Unit Description and Location Code will be automatically populated as well but can be edited
- Enter the customer name
- Enter Price per UOM
- Enter Begin On Hand Quantity
- Enter Usage Per Day
- Enter Safety Stock Days
- The Lot size is automatically derived from the part master
- Enter the lead time committed to the customer
- Enter the transit time committed to the customer

- Enter the plant handling time (pick, pack and ship) if any
- Enter Runline (if the lot size is smaller than minimum quantity the customer wants) in a single shipment
- Enter the Sales Order # and line # if it is a blanket order
- Associate a CSR at the plant level
- Associate a user at the Customer

Item Information			
Item No:	01917	Item Description:	Label, Cord Assy 2.38 Dia
* Customer:	<input type="text" value="X"/>		
* Customer Item:	<input type="text" value="01917"/>	* Description:	<input type="text" value="Label, Cord Assy 2.38 Dia"/>
* Unit Description:	<input type="text" value="EA"/> ?	Location Code:	<input type="text"/>
* Price Per UOM:	<input type="text" value="0"/> ?	* Begin On Hand Quantity:	<input type="text" value="0"/> ?
Item Usage			
* Usage Per Day:	<input type="text" value="750"/> ?	* Safety time (in days):	<input type="text" value="4"/> ?
* Quantity On Card:	2000		
Handling Information			
* Lead Time (in days):	<input type="text" value="7"/> ? ⚠	* Transit Time (in days):	<input type="text" value="5"/> ? ⚠
* Plant Handling Time (in days):	<input type="text" value="0"/> ?	* Run Line (in cards):	<input type="text" value="1"/> ?
Cycle Information			
<input type="checkbox"/> Check this box if the Item needs Integration	<input type="checkbox"/> Check this box for this item to go through Inspection		
<input type="checkbox"/> Check this box if the product goes through the Shipping Hub	<input type="checkbox"/> Check this box if the Released cards needs to wait till PO is created		
Customer Order Information			
<small>We recommend that you set up a blanket PO for each Kanban item. You can then track releases in Kanban.com and receipts in both your ERP system and Kanban.com. If you want to use Kanban.com to send your blanket PO number to your supplier with each release, key that blanket PO number in below.</small>			
* Order No:	<input type="text" value="67898899"/>	* Order Line No:	<input type="text" value="0"/>
Coordinator Information			
* Plant:	<input type="text" value="X"/>	* Customer:	<input type="text" value="X"/>

There are four configuration options available:

- Check this box if this is integrated with your ERP
  - Check this box if the goods have to wait at Customer's dock for inspection
  - Check this box if the shipment has to be consolidated at Ship Hub
  - Check this box, if the customer's signal has to wait for a discrete P.O.
- Once all the fields have been entered, Click SAVE

The following confirmation screen will be displayed showing that the part is now associated with the customer.

**Customer Association for Item 01917** How do I?

Item 01917 added Successfully

Filter By  Select Operator  Enter Value

Customer	Item	Description	Lead Time (in days)	Transit Time (in days)	Wait at Runline?	Qty On Card	Cards On Hand	Cards On Order	Total Cards
Dell Comp	01917	Label, Cord Assy 2.38 Dia	7	5		2,000	0	0	0

1 to 1 of 1

Ultriva allows you to size the loop for a part with each customer. For e.g. one customer usage may be 100 pieces per day with 7 days lead time and 2 days transit time, while another customer's usage may be 200 pieces per day with 7 days lead time but with 15 days transit time. Ultriva allows you to use these parameters to set up number of cards for each customer.

Here's how the cards are generated.

From the above screen click the CARDS button. The following screen will be displayed.

**Cards List for Customer Dell Comp and Item 01917** Filters Views How do I?

No Card(s) found in the system. Please click Add Cards to setup the loopsize for this item.

- Click Add Cards
- Enter the units on hand at the customer
- Enter the open orders with the plant
- Click Next

**Adjust Loopsize for Item: 01917** How do I?

Input Parameters      Adjust Loopsize      On Order Details

**Initial Setup**

Please enter your current inventory on hand and on order data to setup the Initial Loopsize for the Item:

\* Units On Hand:

\* Units On Order:

The system will automatically compute the total number of cards and set them up appropriately. The On hand cards at the customer and Open orders to the plant.

### Adjust Loopsize for Item: 01917 How do I?

Input Parameters      Adjust Loopsize      On Order Details

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#### Configure Loopsize Parameters

**Initial Setup:**

	Units	Equivalent Kanban Cards
Units On Hand	3000	2
Units On Order	4000	2
<b>Total</b>	<b>7000</b>	<b>4</b>

**Kanban Formula:**

Usage per Day \* (Handling Time + Lead Time + Transit Time + Safety Time)

Quantity on Card

**Recommendation:**

Based on the above formula, the following adjustments will be made:

- 2 Card(s) will be created to represent your On Hand Inventory
- 2 Card(s) will be released to represent your On Order Inventory
- 2 additional Card(s) will be created and released to match the Loopsize
- Loopsize will be adjusted to 6 Card(s).

**Kanban Calculator:**

	Current
Quantity On Card	2000
Handling Time (in days)	0.00
Lead Time (in days)	7.00
Transit Time (in days)	5.00
Usage Per Day	750.00
Safety Stock (in days)	4.00
<b>No of Cards</b>	<b>6</b>

\* Required field 
<< | Prev
Next | >>
X | Cancel

- Review the data and click Next
- The following screen will allow you to enter the information in the open P.O prior to sending them to the plant
- Click finish to generate the cards

### Adjust Loopsize for Item: 01917 How do I?

Input Parameters      Adjust Loopsize      On Order Details

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#### On Order Details

Supplier	Units On Card	Order Quantity	PO #	PO Line #	Release #	Release Line #	Required Receive Date	Unit Price	Revision No
InSinkErator	2,000	2000							
InSinkErator	2,000	2000							
<b>Total</b>	<b>4,000</b>	<b>4000</b>							

These cards will be sent to the plant for replenishing the finished goods. The goal is to sync the open Sales Orders with cards.

The following screen will be displayed which will show the list of cards that has been created.

**Cards List for Customer Dell Comp and Item 01917** Filters Views How do I?

Loopsize adjusted successfully for Item: 01917

Filter By  Select Operator  Enter Value

Find Card ID

Current loop size (Replenishment Cards) **6** Cards to be destroyed after consumption **0** Non-replenishment Cards **0** Total Cards **6**

Card ID ▲	Card State ▼	Cycle No ▼	Qty On Card ▼	Card Qty ▼	Last Action Time ▼	Create Time ▼	Cycles Remaining ▼	Location Code ▼
KCD2B4ZISE2E	On Hand	0	2,000	2,000	01/23/2012 01:24:12 AM	01/23/2012	Infinite	
KCD2B52ISELJ	On Hand	0	2,000	1,000	01/23/2012 01:24:12 AM	01/23/2012	Infinite	
KCD2B53ISEBP	Released	1	2,000	2,000	01/23/2012 01:24:12 AM	01/23/2012	Infinite	
KCD2B54ISEEE	Released	1	2,000	2,000	01/23/2012 01:24:12 AM	01/23/2012	Infinite	
KCD2B55ISERB	Released	1	2,000	2,000	01/23/2012 01:24:12 AM	01/23/2012	Infinite	
KCD2B56ISEA9	Released	1	2,000	2,000	01/23/2012 01:24:13 AM	01/23/2012	Infinite	

Sorted by: Card ID 1 to 6 of 6

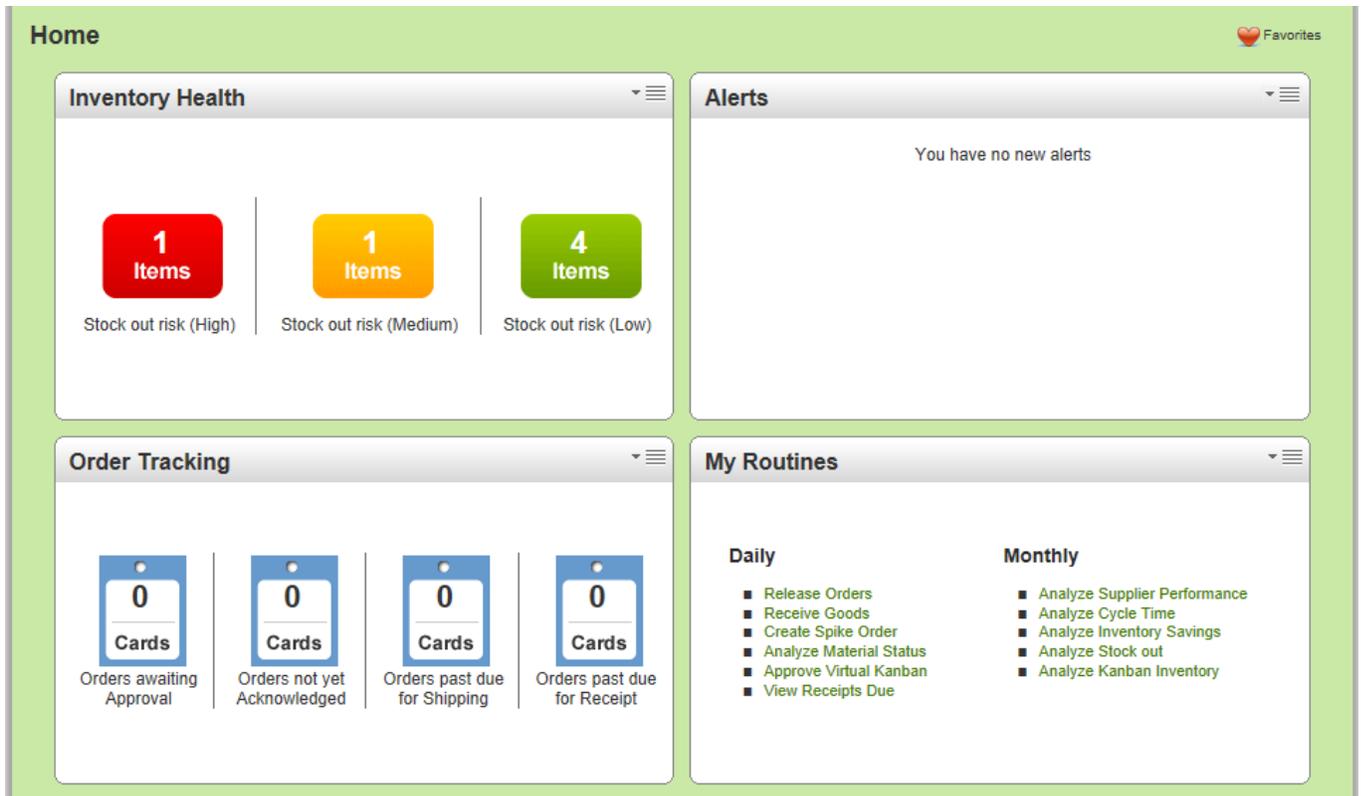
## Customer View

CDP acts as a collaborative tool between the plants and their customers. Like the plants their customers get full visibility in to where their order is at any time.

Customer users can login to the CDP portal to view the parts they are replenishing from their suppliers. In the current version, the replenishment happens when a lot size is consumed by the customer. Customers trigger this replenishment either through a scan at the point of use or using the screen to denote the consumption.

When the customer logs in to CDP, they see the home page as shown below. This home page gives them a very high level view of their orders and inventory. There are four panels which open up.

- The Inventory health panel indicates the risk of running out of parts. The rules are defined by the plants/customers such that when the on-hand at customers goes below a certain level, the part turns from Green to Yellow to Red. This happens in real time as the customer consumes goods and receives new shipments
- The Alerts panel generates exception alerts when something goes wrong. For e.g. when the plant fails to ship on time or it over or under ships the customer gets the alert in the browser and/or via email. Customer could also get a notification when the part moves from yellow to Red.
- The Order tracking panel is for overdue orders. Customers can see how many orders are past due for acknowledgements, shipments and receipts.
- The My Routines panel allows customer users to organize their tasks but creating a daily/weekly/monthly task list. This panel will display the short cuts for those tasks thereby improving their productivity



## Releasing an Order

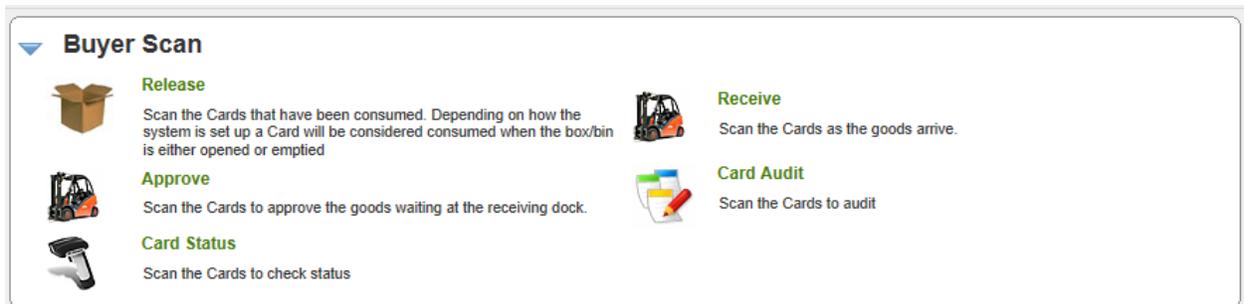
Customers normally perform two key tasks in CDP. They release orders and receive goods.

### Release Scan

Customers can release the order by simply scanning the RELEASEID.

The simple scan will be using a Keyboard wedge scanner.

- Login to CDP as a receiving dock (or customer user)
- Click SCAN on the top menu
- It will open the following menu



Click Release and following screen will open. Scan the RELEASEID. Click Submit.

## Release Card(s) Scan How do I?

Scan Results

Scan Input

Card Id:

Cards Scanned (0)

Card Id	Action

**Submit**

### Manual Release

They can perform the release through the Actions Menu shown below.

- Login as a customer user
- Click Actions on the Top menu item
- Following screen is displayed

## Actions How do I?

**Buyer Actions**

<p> <b>Release</b> Manually release Cards that have been consumed. Depending on how the system is set up a Card will be considered consumed when the box/bin is either opened or emptied</p> <p> <b>Buyer Queue</b> Shows distribution of Card States for each Item</p> <p> <b>Reschedule</b> Change Required date for the orders. You will see a list of Cards that can be rescheduled and you can select the ones to reschedule</p> <p> <b>Spike Orders</b> Manually create one time orders</p>	<p> <b>Receive</b> Receive Cards as they arrive. You will see a list of Cards that are in transit and you can select the ones to receive</p> <p> <b>Recall</b> If you accidentally marked a Card as consumed. You can undo that transaction here</p> <p> <b>BulkPrint</b> View a list of all Cards on hand. If necessary you can also reprint Card labels</p> <p> <b>Add Notes</b> Add notes to one or more Cards in cycle</p>
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Click RELEASE to trigger a signal to the plant for replenishment. The following screen will be displayed.

### Release Items List

Filters Views How do I?

Supplier: All Suppliers Cards: All Show: Items List Category: All RYG: All

Filter By Select Operator Enter Value Go

Find Item Show Cards

RYG	Item	Description	Total Cards	Total Qty
	01413	WIRE, MAG ALUM 21GA	2	800.00
	01917	Label, Cord Assy 2.38 Dia	2	3,000.00
	02091	COPPER MAGNET WIRE 21 GA.	1	1,250.00
	04853	Label, Plug/Cord CSA Eng/FR	7	7,000.00
	PS-2890-Dell	Power System Dell	25	500.00

Sorted by: Item 1 to 5 of 5 Show Cards

Users can select an Item and click Show Cards or change the SHOW drop down from ItemList to CardList and click GO.

The following cards that are on hand ready for consumption will be displayed. Check the card to be released and click RELEASE button.

### Release Cards List

Views How do I?

Find Card ID Release Attach Notes Back To Items Change Filter

Card ID	Item	Description	Cycle No	Qty On Card	Card Qty	Location Code	Last Received	Supplier
<input checked="" type="checkbox"/> KCD2B4CISE2T	01413	WIRE, MAG ALUM 21GA	1	400	400		01/15/2012	InSinkErator
<input type="checkbox"/> KCD2B4DISE72	01413	WIRE, MAG ALUM 21GA	1	400	400		01/15/2012	InSinkErator

Sorted by: Item, Last Received 1 to 2 of 2 Release Attach Notes Back To Items Change Filter

Following confirmation will be displayed on successful release of the signal.

### Release Cards Results

How do I? Back To Items

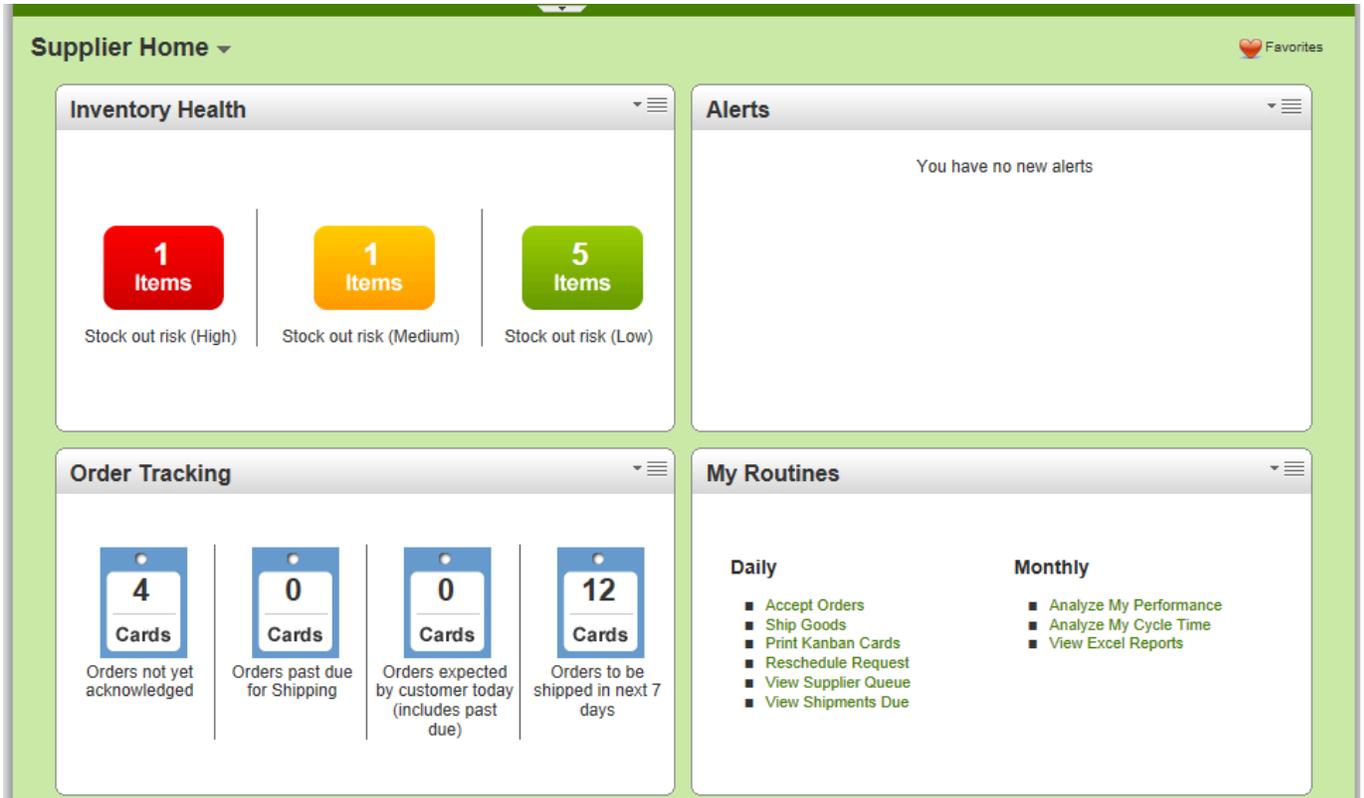
Following cards were successful

Card ID	Item	Card Qty	Description
KCD2B4CISE2T	01413	400	Released To InSinkErator.

## Plant View

Plant will get a consolidated view of all the demands that the customer is sending to them. This consolidated view will help them to optimize their production schedules.

The home page will give the same view as the customer but for all the customers. So the inventory health panel will show consolidated RYG for each loops. What this means is as follows:  
Consider a FG part XYZ. For customer A this part may be in RED while for customer B, this part may be in yellow. So when the plant see this, it will show one in Red and one in Yellow, even though it is the same part.



On the order tracking panel, it will show consolidated past due orders for all the customers.

## Accepting the Order

Plant user will normally perform three key tasks. Accepting or acknowledging the order, Shipping the goods and Printing the label. They can perform these actions through the Actions Menu shown below.

- Login as a plant user
- Click Actions on the Top menu item
- Open the Supplier Actions
- Following screen is displayed

**Actions** ? How do I?

**Buyer Actions**

**Supplier Actions**

-  **Accept**  
View and acknowledge new kanban orders
-  **Ship**  
View the list of acknowledged kanban Cards. Use this screen to indicate the Cards you are shipping. If you have not printed kanban labels already, you can do that here too
-  **Consolidator Ship**  
View the list of acknowledged kanban Cards. Use this screen to indicate the Cards you are shipping. If you have not printed Kanban labels already, you can do that here too
-  **Supplier Queue**  
Shows distribution of Card States for each Item
-  **Recall**  
If you incorrectly marked a Card as shipped. Use this screen to undo the shipment transaction. You will need to know the kanban Card id to undo a shipment
-  **Reschedule Request**  
Change required date for the orders. You will see a list of Cards that can be rescheduled and you can select the ones to reschedule
-  **Production Sequence**  
View list of orders to complete production. Use this screen to complete production for the pending orders.
-  **Print Cards**  
View the list of acknowledged kanban Cards. Use this screen if you want to print labels before you are ready to ship
-  **Print Duplicate Cards**  
View the list of printed kanban Cards. Use this screen if you want to print duplicate labels
-  **Set Tracking No.**  
View the list of shipped kanban Cards. Use this screen to update the tracking number for the shipped Cards.
-  **Set WorkOrder No.**  
View the list of acknowledged kanban Cards. Use this screen to update the workorder number for the acknowledged Cards
-  **Resequence Production Orders**  
View list of orders to complete production. Use this screen to resequence the orders for production

The first action is to accept the cards. Clicking on ACCEPT will display the following screen

**Accept Items List** Filters ? How do I?

Plant: All Plants    Cards: All    Show: Items List    Category: All    RYG: All

Filter By:    Select Operator:    Enter Value:    Go

[Runline Cards | >>](#)   
 [Wait For PO Cards | >>](#)   
 [Released Cards | >>](#)   
 [Reschedule Approval Cards | >>](#)   
 [Recall Wait Cards | >>](#)

RYG	Supplier Item No. ▲	Description ▼	Runline ▼		Wait For PO ▼		Released ▼		Reschedule Approval ▼		Recall Wait ▼		Total ▼	
			Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty
<span style="color: red;">■</span>	01413	WIRE, MAG ALUM 21GA	0	0.00	0	0.00	1	400.00	0	0.00	0	0.00	1	400.00
<span style="color: green;">■</span>	01917	Label, Cord Assy 2.38 Dia	0	0.00	0	0.00	4	8,000.00	0	0.00	0	0.00	4	8,000.00
<b>Total</b>			0	0.00	0	0.00	5	8,400.00	0	0.00	0	0.00	5	8,400.00

Sorted by: Supplier Item No. 1 to 2 of 2

[Runline Cards | >>](#)   
 [Wait For PO Cards | >>](#)   
 [Released Cards | >>](#)   
 [Reschedule Approval Cards | >>](#)   
 [Recall Wait Cards | >>](#)

Click on Released Cards button. All the cards that have been released by customer(s) and ready to accept will be displayed as shown below:

**Accept Cards List** Views How do I?

Find Card ID  **Accept** | >> **Attach Notes** | >> **Print PO** << | **Back To Items** << | **Change Filter**

Work Order Number:

<input type="checkbox"/>	Card ID ▲	Supplier Item No. ▲	Release Date ▲	Reqd Ship ▼	Reqd Receive ▼	Card Qty ▼	WorkOrder No.	PO # ▼	PO Line # ▼
<input checked="" type="checkbox"/>	KCD2B4CISE2T	01413	01/23/2012	02/01/2012	02/07/2012	400	<input type="text" value="567899"/>	DC345678	0
<input type="checkbox"/>	KCD2B53ISEBP	01917	01/23/2012	02/01/2012	02/08/2012	2,000	<input type="text"/>	67898899	0
<input type="checkbox"/>	KCD2B54ISEEE	01917	01/23/2012	02/01/2012	02/08/2012	2,000	<input type="text"/>	67898899	0
<input type="checkbox"/>	KCD2B55ISERB	01917	01/23/2012	02/01/2012	02/08/2012	2,000	<input type="text"/>	67898899	0
<input type="checkbox"/>	KCD2B56ISEA9	01917	01/23/2012	02/01/2012	02/08/2012	2,000	<input type="text"/>	67898899	0

Sorted by: Supplier Item No., Release Date, Card ID 1 to 5 of 5

**Accept** | >> **Attach Notes** | >> **Print PO** << | **Back To Items** << | **Change Filter**

Check the card(s) to accept. Enter your internal work order if necessary. Click Accept to acknowledge receipt of this order. You will get a notification that card is successfully accepted.

At this point, these are orders and ready to be produced. Normally using integration these orders are populated in to the ERP system which then schedules the order in to production either using MRP or Ultriva's Lean Factory Management (LFM) module.

### Shipping Goods

When the goods are ready for shipment, plant user can login in to the CDP and do the shipment. Multiple options are supported in Ultriva to perform the shipment.

- While sending the sales order to ERP Ultriva can also send the ReleaseID. This becomes a key cross reference between the two systems
- For plants which prints its own label, they can include this Release ID in the label so that there is no need for them to print it from CDP
- If the shipment is done in ERP and the label is printed through the ERP system (including the ReleaseID), then CDP can be updated via integration. No additional work need to be done in CDP
- If none of this is automated, then the plant can click SHIP from action menu shown above.
- The following screen will be displayed listing all the cards that has been accepted and ready for shipment.

### Ship Cards List

Views [How do I?](#)

Find Card ID  [Ship](#) | [Attach Notes](#) | [Back To Items](#) | [Change Filter](#)

Tracking No.  Carrier  Packing Slip No  Charge No

<input type="checkbox"/>	Card ID ▲	Supplier Item No. ▲	Release Date ▼	Reqd Ship ▲	Reqd Receive ▼	Card Qty ▼	Ship Qty	Packing Slip No ▼	Charge No	PO # ▼
<input checked="" type="checkbox"/>	KCD2B47ISEYL	01413	01/15/2012	01/25/2012	01/31/2012	400	400	HG900899		DC34567
<input type="checkbox"/>	KCD2B48ISEW6	01413	01/15/2012	01/25/2012	01/31/2012	400	400			DC34567
<input type="checkbox"/>	KCD2B49ISE93	01413	01/15/2012	01/25/2012	01/31/2012	400	400			DC34567
<input type="checkbox"/>	KCD2B4AISE6L	01413	01/15/2012	01/25/2012	01/31/2012	400	400			DC34567
<input type="checkbox"/>	KCD2B4BISEWV	01413	01/15/2012	01/25/2012	01/31/2012	400	400			DC34567
<input type="checkbox"/>	KCD2B4CISE2T	01413	01/23/2012	02/01/2012	02/07/2012	400	400			DC34567
<input type="checkbox"/>	KCD2B4EISEY7	01502	01/15/2012	01/25/2012	01/30/2012	1,250	1250			DC34567
<input type="checkbox"/>	KCD2B4FISE3D	01502	01/15/2012	01/25/2012	01/30/2012	1,250	1250			DC34567
<input type="checkbox"/>	KCD2B4GISEUG	01502	01/15/2012	01/25/2012	01/30/2012	1,250	1250			DC34567
<input type="checkbox"/>	KCD2B4HISESS	01502	01/15/2012	01/25/2012	01/30/2012	1,250	1250			DC34567

Check the cards to be shipped enter the tracking number, enter the packing slip number and traceability number if necessary and then click SHIP button.

The following screen will be displayed confirming successful shipment.

### Ship Cards Results

[How do I?](#) [Back To Items](#)

1 card(s) have been shipped without printing. Please immediately print the card(s) by clicking Print Cards button

No.Of Copies:  [Print Cards](#) | [»](#)

<input type="checkbox"/>	Card ID	Supplier Item No.	Description	Printed
<input checked="" type="checkbox"/>	KCD2B47ISEYL	01413	Card Successfully Shipped and Not Printed.	No

[Print Cards](#) | [»](#)

Click the PRINT CARDS button to print the shipping label. Stick the label to the lot and move it out to shipping dock.

## Receiving goods by the customer

Customers can receive the goods in to their receiving dock or consignment location by scanning the RELEASEID.

### Release Scan

Two types of scanners are supported in CDP - Keyboard wedge scanner and Handheld Mobile scanner

The simple scan will be using a Keyboard wedge scanner.

- Login to CDP as a receiving dock (or customer user)
- Click SCAN on the top menu
- It will open the following menu

**Buyer Scan**

 **Release**  
Scan the Cards that have been consumed. Depending on how the system is set up a Card will be considered consumed when the box/bin is either opened or emptied

 **Receive**  
Scan the Cards as the goods arrive.

 **Approve**  
Scan the Cards to approve the goods waiting at the receiving dock.

 **Card Audit**  
Scan the Cards to audit

 **Card Status**  
Scan the Cards to check status

Click Receive and following screen will open. Scan the RELEASEID. Change the receive quantity if need be and click Submit.

### Receive Card(s) Scan How do I?

Scan Results

**Scan Input**

Card Id:

Receive Qty:

Cards Scanned (0)

Card Id	Receive Qty	Action
---------	-------------	--------

**Submit**

Mobile Scanners can also be used to receive the goods which will not require a PC . The handheld mobile scanner will allow the user to login and complete the transaction.

Once received it will show on hand at the customer and card cycle will be complete.

## Manual Receive

Alternatively, Customers can receive these goods through a manual entry as shown below

	Card ID	Item	Reqd Receive	Ship Date	Card Qty	Ship Qty	Receive Qty	Storage Location	PO #	Tracking URL
<input checked="" type="checkbox"/>	KCD2B47ISEYL	01413	01/31/2012	01/23/2012	400	400	<input type="text" value="400"/>	LXX-889	DC345678	

Enter the warehouse location code if necessary and click Receive. A confirmation screen stating that card was successfully received will be displayed.

## Reports

Please refer to the Reports Reference guide for details. All the Buyer Reports will work for Customer and all the Supplier Reports will work for Plants.

## Plant Configuration (Optional)

### Configuring the Plant

(NOTE: This will continue to change as we make changes to the software)

If you are the administrator for the Plant here are the steps to choose configuration options:

- Click on "My Account" menu from the top right hand corner
- Following screen will be displayed

**My Account**

- Change Profile**  
View and change personal details such as name, phone, and email
- Change Password**  
Change login password
- My Preference**  
View and update preferences such as records per page
- My Business Unit**  
View and update businessunit details such as name, location and address
- My Business Unit Configuration**  
View and update businessunit preferences

- Select "My Business Unit Configuration"
- Following screen is displayed.  
The options displayed for plant business units. Most of the options may be common for the plant as well as work centers. As we explain each tab we will highlight them accordingly.
- The following tabs are available in the configuration:
  - o General – Mostly generic plant level options
  - o Card – Options at the Card level
  - o Custom – Specific to work centers
  - o Integration – Options specific to integration
  - o Print – Options supporting Printing
  - o Receive – Options that can be set for supporting Receiving process
  - o Release – Options that can be set for supporting Releasing process
  - o Scan – Options that can be set for supporting Scanning process
  - o Ship – Options that can be set for supporting Shipping Process

**Plant Configuration for: Plant One** How do I?

General | Card | Custom | Integration | Print | Receive | Release | Scan | Ship

**Configuration Settings**

Name	Value
Call-Off for Forecast Items:	<input type="checkbox"/> OFF
Required Receive Date Calculation using Calendar Days:	<input type="checkbox"/> OFF
Buyer Reschedule should wait for Supplier Approval:	<input checked="" type="checkbox"/> ON
Buyer Recall should wait for Supplier Approval:	<input checked="" type="checkbox"/> ON
Allow operators to restart production for held jobs:	<input type="checkbox"/> OFF
Track Blanket PO Qty:	<input type="checkbox"/> OFF

\* Required field Save | >> | X | Cancel

**General Options tab:**

- *Call-off for Forecast Items* – Not relevant for Kanban parts. Unique functionality to engineered to manufacture and long lead time parts
- *Required Receive Date Calculation using Calendar Days* – Ultriva normally computes Required Receive date based on the business calendar set in the business unit. This option when set on will compute using calendar days instead
- *Buyer Reschedule should wait for Supplier Approval* –When set to ON, buyer will not be able to unilaterally reschedule a card that is accepted by the supplier. The work flow kicks in to ensure that the supplier approves prior to changing the date in the system
- *Buyer Recall should wait for Supplier Approval* - When set to ON, buyer will not be able to unilaterally recall a card that is accepted by the supplier. The work flow kicks in to ensure that the supplier approves the recall.

- *Allow operators to restart production for held jobs* – In the default mode, if the operator puts the job on hold, then only a supervisor can reset that job. If this option is set to ON, then that overrides the default and allows operator to reset the job
- *Track Blanket PO Quantity* – In the supplier mapping screen user can input the blanket P.O. quantity. If this flag is set to ON, then Ultriva tracks the releases against this blanket quantity and monitors the balance quantity available. Using respective alerts Ultriva can notify the planner/buyer that they may be running out of blankets before it actually happens.

### Plant Configuration for: Plant One How do I?

General
Card
Custom
Integration
Print
Receive
Release
Scan
Ship

#### Configuration Settings

Name	Value
Different Prefix for Temporary Card:	<input checked="" type="checkbox"/> ON <input type="checkbox"/> OFF
Expiry Date for Temporary Card:	<input checked="" type="checkbox"/> ON <input type="checkbox"/> OFF
ItemSync Loopsize Action:	None <input type="text"/>
Loopsize Formula Kind:	Minimum 2 cards if calculated is less than 2 <input type="text"/>

\* Required field

#### Card Option Tab:

- *Different Prefix for Temporary Card* - If this feature is set to ON, then temporary cards (like spike card and seasonal cards) will have a different prefix so that they can be visually identified
- *Expiry date for temporary card* – If this feature is set to ON, then the system will keep track of temporary cards by time instead of number of cycles. For e.g. you can set seasonal cards for 30 cycles or for 90 days depending on whether this flag is turned ON or OFF
- *ItemSync Loopsize Action* – This option determines the behavior of change in Usage Per Day in the Item sync files

ItemSync Loopsize Action:

Loopsize Formula Kind:

None

None
  All
  Do Increase & Log Decrease

- - o None – Ultriva updates the usage per day but does not resize the loop size. i.e. adding or deleting cards
  - o All – Ultriva updates the usage per day but also adds or sets cards to delete based on the change
  - o On Increase and Log Decrease – Ultriva updates the usage per day. If the usage per day has gone up then it adds the cards and releases them to the supplier. If the usage per day has gone down, it logs the decrease but does not set cards to delete
- *Loop Size Formula Kind* – This determines whether a minimum number of cards should be set. The options are:

- Minimum of 2 cards. This means that if the Kanban calculator determines that total number of cards is less than 2 cards, the system will still create a minimum of two cards
- No Adjustments – Use the calculator – If this option is selected then the number of cards will exactly match the calculated number of cards

### Plant Configuration for: Plant One How do I?

General
Card
Custom
Integration
Print
Receive
Release
Scan
Ship

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#### Configuration Settings

Name	Value
Inspection reject behavior:	Classic <span style="float: right;">▼</span>
MRP Forecast:	<div style="border: 1px solid #ccc; padding: 2px;">           Both <span style="float: right;">▼</span> <ul style="list-style-type: none"> <li><input type="radio"/> Planned Orders</li> <li><input type="radio"/> Gross Requirements</li> <li><input checked="" type="radio"/> Both</li> </ul> </div>

\* Required field

Save | >
X | Cancel

#### Custom Tab:

- *Inspection reject behavior* - The options are :
  - Classic – If selected then the rejected cards are automatically sent back to the Suppliers
  - Manual – If selected the cards will wait on Reject with an option for user to either rework or send the card back to supplier
- MRP Forecast – Setting this flag will determine what data will be displayed in the MRP Orders panel in the home page. The options are:
  - Planned Orders – The home page will display all the planned orders received from MRP. Users will be able to convert these planned orders in to Firm orders by releasing them in Ultriva.
  - Gross Requirements – The home page will display the forecasts for all the parts in the system. In the event there are multi-sourcing of the suppliers, the system will automatically distribute the forecasts based on the split defined in the Supplier mapping screen for that ITEM
  - Both – This will allow the users to toggle between planned orders and Gross Requirements if both data sets are being sent by MRP.

**Plant Configuration for: Plant One** ? How do I?

General Card Custom **Integration** Print Receive Release Scan Ship

**Configuration Settings**

Name	Value
Retry Operation for Integration:	<input checked="" type="checkbox"/> ON <input type="checkbox"/> OFF
Separate Work Orders from PO:	<input type="checkbox"/> ON <input checked="" type="checkbox"/> OFF
Show Integration Flags on Item Screen:	<input type="checkbox"/> ON <input checked="" type="checkbox"/> OFF
Organization Id:	<input type="text"/>
Deliver Location Code:	<input type="text"/>

\* Required field Save | >> X | Cancel

**Integration Tab:**

- *Retry operation for integration* – This could be set to ON or OFF. If set to ON, then the user will have the ability to retry a failed transaction
- *Separate Work Orders from P.O.* – If set to ON then purchase orders and work orders can be interfaced during integration
- *Show Integration Flags on Item Screen* – If set to ON, then in the Item edit screens the integration flags will be displayed
- *Organization ID* – If a different code than what is set up in the Work Center is needed for integration the same can be entered here
- *Deliver Location Code* – if there is a generic delivery location at this work center then the same can be entered in this screen

**Plant Configuration for: Plant One** ? How do I?

General Card Custom Integration **Print** Receive Release Scan Ship

**Configuration Settings**

Name	Value
Email Printing of Kanban Cards:	<input type="checkbox"/> ON <input checked="" type="checkbox"/> OFF
Print Kanban Card using Ultriva Software:	<input checked="" type="checkbox"/> ON <input type="checkbox"/> OFF
Number of Label copies to Print:	<input type="text" value="2"/>
Auto print cards that are to be printed:	<input type="checkbox"/> ON <input checked="" type="checkbox"/> OFF
Auto print cards interval (in minutes):	<input type="text" value="10"/>

\* Required field Save | >> X | Cancel

### Print Tab:

- *Email printing of Kanban Cards* – Ultriva provides an option to email the label for remote printing at the supplying location. If this flag is set to ON, for each card an email is sent with a hyperlink. Supplier user can then click the link and print the card
- *Print Kanban card using Ultriva software* – This is the standard default option
- *Number of label copies to print* – This is a global setting for the plant. If it is set to more than 1, then that many copies will be printed every time the card is printed
- *Auto Print cards that are to be printed* – This provides an option to accumulate the cards for the time interval (described below) and then prints them automatically
- *Auto print cards interval (in minutes)* - As described above the cards will be accumulated during this interval and then automatically printed

#### Plant Configuration for: Plant One How do I?

General Card Custom Integration Print **Receive** Release Scan Ship

##### Configuration Settings

Name	Value
Receive Item:	<input checked="" type="checkbox"/> ON <input type="checkbox"/> OFF
Receive Integration should wait for successful Release Integration:	<input type="checkbox"/> ON <input checked="" type="checkbox"/> OFF
Reverse Receipt LastLot Check:	<input checked="" type="checkbox"/> ON <input type="checkbox"/> OFF
Scan Location:	<input type="checkbox"/> On Receive <input type="checkbox"/> On Approve <input type="checkbox"/> Validate on Receive <input type="checkbox"/> Validate on Approve
Put Away card action should wait for ERP Receipt Info:	<input type="checkbox"/> ON <input checked="" type="checkbox"/> OFF

\* Required field

### Receive Tab:

- *Receive Item* – If this is set to ON, then the Item is automatically received on shipment
- *Receive Integration should wait for successful release integration* – This is normally set to ON to ensure that ERP transaction integrity is maintained. i.e. Unless the order is created the receipt against that order cannot take place.
- *Reverse receipt last lot check* – If the receipt data is coming for ERP and the data consists of only quantities and not lot number, then this allows the ERP to signal that the last lot against this P.O. is received. Ultriva will then close the P.O. and the cards associated with that
- *Scan Location* – You can enable all the locations where the scan could take place. This will help to enable Keyboard wedge scan or mobile scan as appropriate
- *Put Away Card action should wait for ERP receipt Info* – This is just controlling the preceding process is completed prior to putting the goods away.

**Plant Configuration for: Plant One** How do I?

General | Card | Custom | Integration | Print | Receive | **Release** | Scan | Ship

**Configuration Settings**

Name	Value
Approvals for Virtual Kanban Release:	<input checked="" type="checkbox"/> ON
Consumption Scan for Forecast Items:	<input checked="" type="checkbox"/> ON
Release Planned Orders by Lotsize for Forecast Items:	<input checked="" type="checkbox"/> ON

\* Required field Save | X | Cancel

**Release Tab:**

- *Approve for virtual Kanban release* – Virtual Kanban feature in Ultriva uses on-hand inventory in ERP to trigger a Kanban signal to the supplier or supplying work center. If this flag is set to ON, then this signal will wait for approval before being sent to supplier or supplying work center.
- *Consumption scan for forecast item* – Ultriva can provide the same metrics – RYG, demand changes, cycle time calculations etc. for Forecast items if users scan the goods at the point of use. If this flag is set to ON, then Ultriva holds the forecast cards from destroying at the point of receipt but destroys the card on the scan.
- *Release Planned Orders by Lotsize for Forecast Items* – One option Ultriva provides to release orders in standard lot sizes even for forecast items. If this flag is set to ON then Ultriva will automatically take the total quantity and automatically convert to lot sizes before releasing it to Suppliers.

**Plant Configuration for: Plant One** How do I?

General | Card | Custom | Integration | Print | Receive | Release | **Scan** | Ship

**Configuration Settings**

Name	Value
Single Scan:	<input type="checkbox"/> OFF
Auto Receive on Release Scan:	<input type="checkbox"/> OFF
Auto Ship on Receive Scan:	<input type="checkbox"/> OFF

\* Required field Save | X | Cancel

**Scan Tab:**

- *Single Scan* – This applies only for Keyboard Wedge scanning. If it is set to ON, then each transaction will be automatically committed. If it is set to OFF then the scans can be committed in a batch

- *Auto Receive on Release Scan* - If this is set to ON, then it automatically completes the missed receive transactions at the point of consumption. So on the floor the scan is not causing an error.
- *Auto Ship on Receive Scan* – If this flag is set to ON, then Ultriva automatically completes the ship transaction at the receiving dock when receiving goods. Again this is to prevent transactions from erroring out.

**Plant Configuration for: Plant One** How do I?

General | Card | Custom | Integration | Print | Receive | Release | Scan | **Ship**

**Configuration Settings**

Name	Value
Force Packing Slip No in Ship Screen:	<input type="checkbox"/> OFF
Auto Ship on Close Production:	<input type="checkbox"/> OFF
Temporary Card Creation for Partial Shipments:	<input type="checkbox"/> None <input checked="" type="radio"/> None <input type="radio"/> All Items <input type="radio"/> Selected Items

\* Required field

**Save | >** **X | Cancel**

### Ship Tab:

- *Force Packing Slip in Ship Screen* – if customer wants supplier to always enter the packing slip # at the time of shipment, then this flag should be set to ON
- *Auto Ship on Close production* – This is only for internal work centers. When set to ON, then when the operator closes a schedule on the production sequence screen, then the Ship transaction is completed so that materials can be moved to the consuming location
- *Temporary Card creation for partial items* – Normal Kanban/Forecast items behavior is to ship a full card, even if supplier’s ship short. The assumption is short shipment will lead to faster consumption cycle and therefore card will be released quickly. However Ultriva provides an option whereby a child card can be created for partial shipments and left at supplier for fulfillment. i.e. Assume that this flag is set for all items or selected items. If the card quantity is 100 pieces for the selected item and the supplier ships 80 pieces, then Ultriva will automatically create a child card for 20 pieces and put it “in process” state at the supplier.