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# Collaborative Supply Portal (CSP)

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Supplier User and  
Reference Guide

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Version 7.0  
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# User Guide for Suppliers using Collaborative Supply Portal (CSP)

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## Base Functionality

CSP provides functionality to manage a company's global supply chain. It provides a collaborative supply portal for the plants and its suppliers to interact in real time. Through the portal all the players in the supply chain get full visibility in to:

- Purchase Orders
- Shipments
- Receipts
- Inventory
- Metrics
- KPI
- Notifications
- Forecasts

The portal supports multiple forms of material replenishments as listed below:

- Standard purchase orders: Orders generated by ERP
- Planned demand: Planned purchase orders generated during MRP run
- Consumption driven replenishment: Orders generated through Kanban signals or virtual Kanban signals
- Consignment/VMI: Signals generated through pulling material from consignment or vendor managed inventory

Lastly portal supports transactions driven by bar codes and/or RFID while integrating with ERP for master data synchronization and transactional updates.

This document details:

- Description of Suppliers process flow
  - o Accepting a card or acknowledging an order
  - o Attaching notes to the accepted orders
  - o Rescheduling accepted orders if necessary
  - o Shipping the goods against the orders or Kanban signals
  - o Printing the shipping label
- Supplier Reports
- Reference guide on other sup

## Supplier Home Page:

The home page provides a dashboard view for the supplier to look at the actions to be performed on their customer orders, all the alerts regarding their replenishments, the inventory health status of their customers for the parts they are supplying, the forecasts and their regular routines as shown below:

The screenshot displays a dashboard with five main sections:

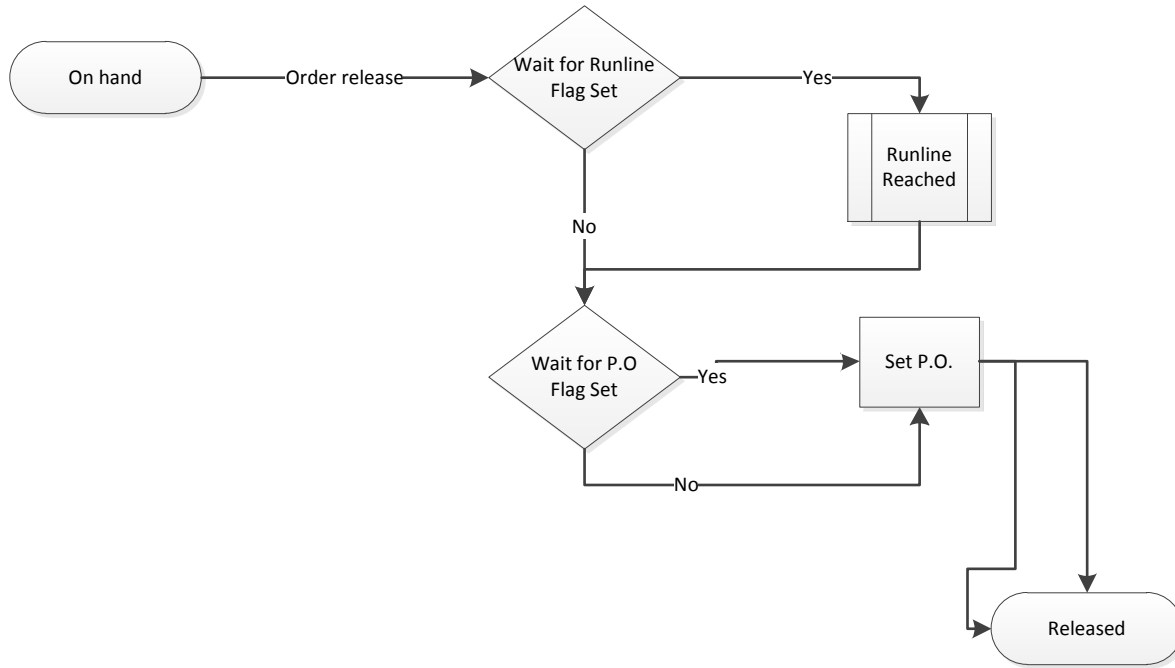
- Inventory Health:** Three colored boxes representing stock out risk levels: 2 Items (High, Red), 1 Item (Medium, Yellow), and 12 Items (Low, Green).
- Alerts:** A table with columns for Date and Subject. One alert is shown: 08/28/2011, Release alert. It includes a 'Sorted by: Date' dropdown and a '1 to 1 of 1' indicator.
- Order Tracking:** Four blue boxes representing different order statuses: 3 Cards (Orders not yet acknowledged), 52 Cards (Orders past due for Shipping), 52 Cards (Orders expected by customer today), and 52 Cards (Orders to be shipped in next 7 days).
- My Routines:** Two columns of tasks: Daily (Accept Orders, Ship Goods, Print Kanban Cards, Reschedule Orders, View Supplier Queue, View Shipments Due) and Monthly (Analyze My Performance, Analyze My Cycle Time, View Excel Reports).
- MRP Forecasts Gross Requirements:** Three green boxes representing forecast requirements: 91 Cards, 1 Card, and 3 Cards.

At the bottom right, there is a status bar with a green checkmark and the text 'Trusted sites | Protects'.

- Inventory health tracks the risk of stocking out
  - o RED – HIGH RISK
  - o YELLOW – MEDIUM RISK
  - o GREEN – LOW RISK
- Alerts and Notifications (Browser or email). e.g.
  - o Orders released
  - o Orders not acknowledged
  - o Orders not shipped
- Tracking outstanding orders:
  - o Orders not acknowledged
  - o Shipment over due
  - o Order due for shipment on that date
- User specific routines:

- Daily tasks
- Monthly tasks
- Go to action screen in one click

## Supplier work flows



### Buyer Options:

Supplier work flows can be changed by setting two flags in Associate supplier Screen;

- Force the order to wait for P.O.
  - In this scenario, the supplier will be able to see the release of the cards but will not be able to accept or acknowledge the order. Once the ERP provides a P.O. number the card data will be updated and supplier will be able to accept it
- Force the cards to accumulate in runline.
  - This option is normally used if the supplier requires a minimum order quantity but the lot size is smaller than the MOQ. This is used only for Kanban parts. For e.g. minimum order quantity is 200 pieces and the lot size is 50 pieces. The runline will be set to 4. As customers scan each card it will accumulate in a queue till the runline is reached. Unlike the above option of waiting for P.O., suppliers can override and accept the orders even when the runline is not reached.

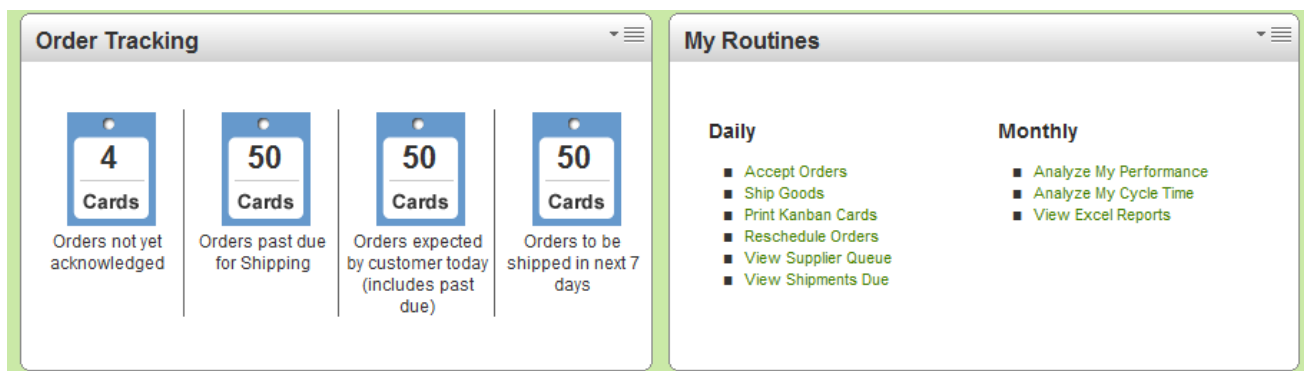
## Supplier Process

The supplier has to perform two key actions in Ultriva. One is to acknowledge order by accepting the orders and two to ship the accepted orders on the required ship date. Optionally supplier can reschedule the orders if necessary. Similarly if the buyer initiates the reschedule then the supplier will have the option to accept or reject the reschedule. Finally prior to physically shipping supplier can print the shipping label in Ultriva and stick those labels in the boxes. We will detail how each of these actions are performed in Ultriva.

### Accepting Orders

The first step the supplier has to do is to accept the orders. (Buyer will have an option to set the supplier in an Auto Accept mode, in which case they don't have to perform this action). Suppliers can get to this screen one of two modes:

- From the home page they can click "Order not yet acknowledged" from the Order Tracking panel or "Accept Orders" from My Routines panel as shown below
- Alternatively users can click Action from the top line menu and select Accept from the menu list



- The following screen will be displayed
- When the order is released the orders could be in any one of the states
  - o Waiting for P.O. to be created
  - o Waiting for Runline to be reached
  - o Released cards (waiting to be accepted)
- Unless it is in the Released Cards state the supplier will not be able to accept the cards.
- The following screen shows orders waiting for P.O.s and Released cards waiting to be accepted

### Accept Items List

Filters How do I?

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

Filter By: Select Operator: Enter Value: Go

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

RYG	Supplier Item No.	Description	Wait For PO		Runline		Released		Reschedule Approval		Recall Wait		Total	
			Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty
	ADG-89090-12	Rotor 125-12	3	375.00	1	125.00	6	725.00	0	0.00	0	0.00	10	1,225.00
Total			3	375.00	1	125.00	6	725.00	0	0.00	0	0.00	10	1,225.00

### Waiting for P.O. state

- When cards are in this state, the supplier will be able to view the cards but cannot accept them. As shown below they can see all the details related to the cards but there is no action button.

### Cards Waiting For PO List

Views How do I?

Find Card ID:  [Back To Items](#) [Change Filter](#)

Card ID	Supplier Item No.	Release Date	Reqd Ship	Reqd Receive	Card Qty	PO #	PO Line #
KCD3TPCCNAMP	ADG-89090-12	04/04/2011	04/20/2011	04/25/2011	125		0
KCD3TPDCNAQE	ADG-89090-12	04/04/2011	04/20/2011	04/25/2011	125		0
KCD3TPECNAFB	ADG-89090-12	04/04/2011	04/20/2011	04/25/2011	125		0

- When the Released Cards are waiting for P.O. creation then an action has to take place prior to supplier accepting the cards
  - o An integration with ERP will move it to released cards state
  - o If there is no integration then the buyer can manually set the P.O. by doing the following:
    - Login as the buyer
    - Click Action and select SET P.O. from the menu list. Following screen will be displayed
    - Select the item and click show cards
    - Following screen will be displayed



### Set PO Cards List

Views How do I?

Find Card ID

**Set PO** | **Attach Notes** | **Back To Items** | **Change Filter**

PO. #  PO. Line #  Release #  Release Line #

<input type="checkbox"/>	Card ID ▲	Item ▲	Release Date ▼	Reqd Ship ▼	Reqd Receive ▲	Card Qty ▼	PO #	PO Line #	Release #	Release Line #
<input checked="" type="checkbox"/>	KCD3TPCCNAMP	ADG-89090-12	04/04/2011	04/20/2011	04/25/2011	125	KG-566788	1		
<input checked="" type="checkbox"/>	KCD3TPDCNAQE	ADG-89090-12	04/04/2011	04/20/2011	04/25/2011	125	KG-566788	2		
<input checked="" type="checkbox"/>	KCD3TPECNAFB	ADG-89090-12	04/04/2011	04/20/2011	04/25/2011	125	KG-566788	3		
<input checked="" type="checkbox"/>	KCD3TPFCNAL9	ADG-89090-12	04/04/2011	04/20/2011	04/25/2011	125	KG-566788	4		

- Check the box, enter the P.O., P.O. line, release number, release line number as appropriate
- Click Set P.O button
- Following results screen will be displayed

### Set PO Cards Results

How do I?

**Back To Items**

Following cards were successful

	Card ID	Item	Description
	KCD3TPCCNAMP	ADG-89090-12	PO Set Successfully.
	KCD3TPDCNAQE	ADG-89090-12	PO Set Successfully.
	KCD3TPECNAFB	ADG-89090-12	PO Set Successfully.
	KCD3TPFCNAL9	ADG-89090-12	PO Set Successfully.

### Waiting for Runline state

- Unlike Waiting for P.O. state, the supplier can not only view the cards that are waiting but can override if necessary by selecting the cards and accepting them as shown below

### Accept Waiting At Runline Cards List

Views How do I?

**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	PO #	PO Line #	WorkOrder No.
<input checked="" type="checkbox"/>	KCD3TPFCNAL9	ADG-89090-12	04/04/2011	04/20/2011	04/25/2011	125		0	<input type="text"/>

- If the buyer decided to accept these cards then the system will warn them about their override but still provide an option to confirm the override as shown below

**Accept Waiting At Runline Cards Results** How do I?

[« | Back To Items](#)

Please note that you are overriding the minimum Run Line requirement. Do you still want to accept these cards?

	Card ID	Supplier Item No.	Release Date	Reqd Ship	Reqd Receive	Card Qty	PO #	PO Line #	WorkOrder No.
<input checked="" type="checkbox"/>	KCD3TPFCNAL9	ADG-89090-12	04/04/2011	04/20/2011	04/25/2011	125		0	<input type="text"/>

[Confirm | »](#)

- Once confirmed the cards will be moved to In Process state from where the supplier can ship the goods

**Accept Waiting At Runline Cards Results** How do I?

[« | Back To Items](#)

Following cards were successful

Card ID	Supplier Item No.	Description
KCD3TPFCNAL9	ADG-89090-12	Runline Card accepted and waiting for PO.

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

Plant:  Cards:  Show:  Category:  RYG:

Filter By:  Select Operator:  Enter Value:  [Go](#)

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

RYG	Supplier Item No.	Description	Wait For PO		Runline		Released		Reschedule Approval		Recall Wait		Total	
			Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty
<input checked="" type="checkbox"/>	ADG-89090-12	Rotor 125-12	4	500.00	0	0.00	6	725.00	0	0.00	0	0.00	10	1,225.00
Total			4	500.00	0	0.00	6	725.00	0	0.00	0	0.00	10	1,225.00

- When the supplier goes back to the Accept items list, he will see that runline cards have moved and there are none waiting in the queue.

### Rescheduling of orders by the supplier

- Ultriva provides an option for the supplier to reschedule the orders (cards) that they have accepted.
- To perform that action do the following:
  - o Login as supplier
  - o Click Actions from the top menu
  - o Select Reschedule Request from the menu list and the following screen will be displayed.

### Reschedule Request Cards List

Views [How do I?](#)

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

New Required Ship date:

Card ID ▲	Supplier Item No. ▲	Release Date ▼	Reqd Ship ▲	Reqd Receive ▼	Qty On Card ▼	Card Qty ▼	New Reqd Ship Date
<input checked="" type="checkbox"/> KCD3TPMCNAC8	ADG-89090-12	04/04/2011	04/20/2011	04/25/2011	125.00	125	<input type="text" value="04/14/2011"/>
<input checked="" type="checkbox"/> KCD3TPNCNAPA	ADG-89090-12	04/04/2011	04/20/2011	04/25/2011	125.00	125	<input type="text" value="04/14/2011"/>
<input type="checkbox"/> KCD3TPPCNAJ6	ADG-89090-12	04/04/2011	04/20/2011	04/25/2011	125.00	125	<input type="text" value="04/20/2011"/>
<input type="checkbox"/> KCD3TPQCNAJ3	ADG-89090-12	04/04/2011	04/20/2011	04/25/2011	125.00	125	<input type="text" value="04/20/2011"/>
<input type="checkbox"/> KCD3TPRCNANH	ADG-89090-12	04/04/2011	04/20/2011	04/25/2011	125.00	125	<input type="text" value="04/20/2011"/>
<input type="checkbox"/> KCD3TPSCNAHC	ADG-89090-12	04/04/2011	04/20/2011	04/25/2011	125.00	100	<input type="text" value="04/20/2011"/>
<input type="checkbox"/> KCD3TPBCNAAJ	ADG-89090-12	04/04/2011	04/20/2011	04/25/2011	125.00	125	<input type="text" value="04/20/2011"/>
<input type="checkbox"/> KCD3TPCCNAMP	ADG-89090-12	04/04/2011	04/20/2011	04/25/2011	125.00	125	<input type="text" value="04/20/2011"/>
<input type="checkbox"/> KCD3TPDCNAQE	ADG-89090-12	04/04/2011	04/20/2011	04/25/2011	125.00	125	<input type="text" value="04/20/2011"/>

Sorted by: Supplier Item No., Reqd Ship, Card ID 1 to 10 of 11 [Prev](#) [Page 1](#) [Next](#)

[Reschedule](#) | [Attach Notes](#) | [Back To Items](#) | [Change Filter](#)

- Select the orders and request a new ship date
- Click Reschedule
- Following result screen will be displayed

### Reschedule Request Cards Results

[How do I?](#)

[Back To Items](#)

Following cards were successful

Card ID	Supplier Item No.	Description
<input type="checkbox"/> KCD3TPMCNAC8	ADG-89090-12	Please call the Buyer <i>Ultriva User</i> and request that he/she approve the Promise Ship Date changes.
<input type="checkbox"/> KCD3TPNCNAPA	ADG-89090-12	Please call the Buyer <i>Ultriva User</i> and request that he/she approve the Promise Ship Date changes.

- The rescheduled cards are in an intermediate state waiting for the buyer to approve. An alert would be sent to buyer as soon as supplier initiates a reschedule

### Approval of supplier reschedule

- Buyer can do the following to approve the reschedule
  - Login as the buyer
  - Click on Action
  - Select Approve Supplier Reschedule Request
  - Following screen will be displayed which shows all the items which has reschedule request

### Approve Supplier Reschedule Items List

Filters Views How do I?

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

Filter By:    Select Operator:    Enter Value:    Go

[Show Cards >>](#)

RYG	Item	Description	Total Qty	Total Cards
	ADG-89090-12	Rotor 125-12	250.00	2

- Click on Show Cards
- Following screen with the order lines which need approval are displayed

### Approve Supplier Reschedule Cards List

Views How do I?

Find Card ID:    [Approve >>](#)    [Reject >>](#)    [Attach Notes >>](#)    [Back To Items <<](#)    [Change Filter <<](#)

	Card ID	Item	Description	Supplier Name	Release Date	Reqd Ship	Reqd Receive	Card Qty	New Req Ship Date	New Req Receive Date
<input checked="" type="checkbox"/>	KCD3TPMCNAC8	ADG-89090-12	Rotor 125-12	XYZ Supplier	04/04/2011	04/20/2011	04/25/2011	125	04/14/2011	04/19/2011
<input checked="" type="checkbox"/>	KCD3TPNCNAPA	ADG-89090-12	Rotor 125-12	XYZ Supplier	04/04/2011	04/20/2011	04/25/2011	125	04/14/2011	04/19/2011

- Buyer has an option to either approve the request or reject the request
  - Approval of request will change the required ship date to the newly requested date and move it to In Process state, ready for shipment of goods
  - Following screen shows the results of the approve action

### Approve Supplier Reschedule Cards Results

How do I?

[Back To Items <<](#)

Following cards were successful

Card ID	Item	Description
KCD3TPMCNAC8	ADG-89090-12	Supplier Reschedule Successfully Approved.
KCD3TPNCNAPA	ADG-89090-12	Supplier Reschedule Successfully Approved.

- Rejection will retain the original date and move the card to In Process state, ready for shipment of goods

### Approve Supplier Reschedule Cards List

Views How do I?

[Approve >>](#)    [Reject >>](#)    [Attach Notes >>](#)    [Back To Items <<](#)    [Change Filter <<](#)

	Card ID	Item	Description	Supplier Name	Release Date	Reqd Ship	Reqd Receive	Card Qty	New Req Ship Date	New Req Receive Date
<input checked="" type="checkbox"/>	KCD3TPMCNAC8	ADG-89090-12	Rotor 125-12	XYZ Supplier	04/04/2011	04/14/2011	04/18/2011	125	04/28/2011	05/03/2011

- Following screen shows the results of the reject action

**Reject Supplier Reschedule Cards Results** How do I?

[« | Back To Items](#)

Following cards were successful

Card ID	Item	Description
KCD3TPMCNAC8	ADG-89090-12	Supplier Reschedule Successfully Rejected.

**Reschedule request by the buyer**

Buyer initiating a reschedule

- Ultriva provides an option for the buyer to reschedule the orders (cards) that have been accepted by the supplier.
- To perform that action do the following:
  - o Login as buyer
  - o Click Actions from the top menu
  - o Select Reschedule from the buyer action menu list and the list of items which has cards with the supplier will be displayed.
  - o Select the item to be rescheduled and click show cards
  - o Following screen with the list of cards for the item pending at the supplier will be displayed

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

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

New Required Receive date:

Card ID ▲	Item ▲	Description ▼	Release Date ▼	Reqd Ship ▼	Reqd Receive ▲	Qty On Card ▼	Card Qty ▼	New Reqd Receive Date
<input checked="" type="checkbox"/> KCD3TPMCNAC8	ADG-89090-12	Rotor 125-12	04/04/2011	04/14/2011	04/18/2011	125.00	125	<input type="text" value="04/14/2011"/>
<input type="checkbox"/> KCD3TPNCNAPA	ADG-89090-12	Rotor 125-12	04/04/2011	04/14/2011	04/18/2011	125.00	125	<input type="text" value="04/18/2011"/>
<input type="checkbox"/> KCD3TPPCNAJ6	ADG-89090-12	Rotor 125-12	04/04/2011	04/20/2011	04/25/2011	125.00	125	<input type="text" value="04/25/2011"/>
<input type="checkbox"/> KCD3TPQCNAJ3	ADG-89090-12	Rotor 125-12	04/04/2011	04/20/2011	04/25/2011	125.00	125	<input type="text" value="04/25/2011"/>
<input type="checkbox"/> KCD3TPRCNANH	ADG-89090-12	Rotor 125-12	04/04/2011	04/20/2011	04/25/2011	125.00	125	<input type="text" value="04/25/2011"/>
<input type="checkbox"/> KCD3TPSCNAHC	ADG-89090-12	Rotor 125-12	04/04/2011	04/20/2011	04/25/2011	125.00	100	<input type="text" value="04/25/2011"/>
<input type="checkbox"/> KCD3TPBCNAAJ	ADG-89090-12	Rotor 125-12	04/04/2011	04/20/2011	04/25/2011	125.00	125	<input type="text" value="04/25/2011"/>
<input type="checkbox"/> KCD3TPCCNAMP	ADG-89090-12	Rotor 125-12	04/04/2011	04/20/2011	04/25/2011	125.00	125	<input type="text" value="04/25/2011"/>
<input type="checkbox"/> KCD3TPDCNAQE	ADG-89090-12	Rotor 125-12	04/04/2011	04/20/2011	04/25/2011	125.00	125	<input type="text" value="04/25/2011"/>

Sorted by: Item, Reqd Receive, Card ID 1 to 10 of 11 [Prev](#) [Page 1](#) [Next](#)

[Reschedule | »](#) [Attach Notes | »](#) [« | Back To Items](#) [« | Change Filter](#)

- o Select one of more cards
- o Change the required receive date

- Click Reschedule
- Following results screen will be displayed

**Reschedule Cards Results** How do I?

[Back To Items](#)

Following cards were successful

Card ID	Item	Description
KCD3TPMCNAC8	ADG-89090-12	Please call the supplier <i>Rick Chavez</i> and request that he/she accept the new Required Receive Date changes.

- In the default mode this card will be put back in the waiting to accept state for approval by supplier. However there is a configuration flag which if set will authorize the buyer to override and change the Required Receive date
- For this example the configuration is default and hence the rescheduled card waits at the to be accepted state.
- Supplier will get a notification stating that buyer has requested a reschedule

### Supplier approval of Buyer Reschedule

- Supplier can approve the reschedule by doing the following:
  - Login as supplier
  - Click Action from the top menu
  - Select ACCEPT from the supplier action menu list
  - Following screen will be displayed showing that there is one card to be accepted that is in the Reschedule Approval state

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

Plant:  Cards:  Show:  Category:  RYG:

Filter By:  Select Operator:  Enter Value:

| 
  | 
  | 
  |

RYG	Supplier Item No.	Description	Wait For PO		Runline		Released		Reschedule Approval		Recall Wait		Total	
			Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty
	ADG-89090-12	Rotor 125-12	0	0.00	0	0.00	0	0.00	1	125.00	0	0.00	1	125.00
Total			0	0.00	0	0.00	0	0.00	1	125.00	0	0.00	1	125.00

- Supplier can click on the button to see the buyer's request as shown below

**Accept Waiting For Reschedule Approval Cards List** Views How do I?

Accept | Attach Notes | Print PO | Back To Items | Change Filter

Work Order Number:

	Card ID	Supplier Item No.	Release Date	Reqd Ship	Reqd Receive	Card Qty	PO #	PO Line #	WorkOrder No.
<input checked="" type="checkbox"/>	KCD3TPMCNAC8	ADG-89090-12	04/04/2011	04/07/2011	04/12/2011	125		0	<input type="text"/>

- Supplier can accept it. If not supplier has to call the buyer to discuss alternate options. Unlike the buyer (in the supplier reschedule request), supplier has not option to reject the request
- When approved the following results screen will be displayed and the card will be moved to In Process state, ready for shipment of goods

**Accept Waiting For Reschedule Approval Cards List** How do I?

Back To Items

Following cards were successful

Card ID	Supplier Item No.	Description
KCD3TPMCNAC8	ADG-89090-12	Card Buyer Reschedule Successfully Accepted.

### Shipping of Goods by the supplier

The next in the flow of materials is the shipment of orders. Ultriva allows suppliers to ship the orders from the portal, print labels and move the orders to In Transit mode.

- To accomplish this do the following:
  - Login as the supplier
  - Click Action from the top menu
  - Select Ship from the supplier action menu list
  - Following screen with the list of shipments that are ready to be shipped will be displayed

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

Plant: Plant One | Cards: All | Show: Items List | Category: All | RYG: All

Filter By: Select Operator | Enter Value | Go

Show Cards |

RYG	Item	Description	Total Cards	Total Qty
	ADG-89090-12	Rotor 125-12	11	1,350.00

- Select the item to be shipped and click Show Cards
- All the cards for that item will be displayed as shown below

**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.

		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"/>	KCD3TPMCNAC8	ADG-89090-12	04/04/2011	04/07/2011	04/12/2011	125	125	1678789		
	<input type="checkbox"/>	KCD3TPMCNAC8	ADG-89090-12	04/04/2011	04/14/2011	04/18/2011	125	125			
	<input type="checkbox"/>	KCD3TPPCNAJ6	ADG-89090-12	04/04/2011	04/20/2011	04/25/2011	125	125			
	<input type="checkbox"/>	KCD3TPQCNAJ3	ADG-89090-12	04/04/2011	04/20/2011	04/25/2011	125	125			
	<input type="checkbox"/>	KCD3TPRCNANH	ADG-89090-12	04/04/2011	04/20/2011	04/25/2011	125	125			
	<input type="checkbox"/>	KCD3TPSCNAHC	ADG-89090-12	04/04/2011	04/20/2011	04/25/2011	100	100			
	<input type="checkbox"/>	KCD3TPBCNAAJ	ADG-89090-12	04/04/2011	04/20/2011	04/25/2011	125	125			FGH-89090-12

Sorted by: Supplier Item No., Reqd Ship, Card ID 1 to 10 of 11 [Prev](#) [Page 1](#) [Next](#)

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

- Enter the tracking number
- Select the Carrier
- Enter the packing slip number (optional)
- Enter the charge (traceability) number (optional)
- Change the ship quantity if necessary. Please note that changes to the ship quantity will prompt a confirmation prior shipment, if the quantity is outside of the tolerance set in the item master
- Attach notes if necessary
- Click Ship
- Ultriva allows the labels to be printed prior to shipping or immediately following the shipping.
- In the ship screen above the second column shows whether the label is already printed or not (black for printed and red square for not printed)
- In this example we shipped a card that is already printed
- So the result screen shows that the card is shipped and it is already printed

### Printing Labels

**Ship Cards Results** How do I?

[Back To Items](#)

	Card ID	Supplier Item No.	Description	Printed
	KCD3TPMCNAC8	ADG-89090-12	Card Successfully Shipped.	Yes

[Print Cards](#) | [»](#)



- If the user tries to print the card again then it will print but marked as duplicate as shown below

PART NO. <b>ADG-89090-12</b>		MFG DAT <b>04/05/2011</b>
		ORIGIN <b>USA</b>
PART DES Rotor 125-12		REV LTR <b>Rev</b>
QUANTIT <b>125</b>	PURCHAS ORDER N	
SUPPLIER <b>XYZ Supplier</b> <b>345 Major</b> <b>Louisville, KY - 79018</b>		DELIVERY LOCATION Plant One 1900 Evergreen Parkway Lebanon, MD - 65536
Kanban Card #	<b>KCD 3TP MCN AC8 - 001 - 6</b>	
<b>DUPLICATE</b>		

**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.

Card ID	Supplier Item No.	Release Date	Reqd Ship	Reqd Receive	Card Qty	Ship Qty	Packing Slip No.	Charge No.	PO #
KCD3TPNCNAPA	ADG-89090-12	04/04/2011	04/14/2011	04/18/2011	125	<input type="text" value="125"/>	<input type="text"/>	<input type="text"/>	
KCD3TPPCNAJ6	ADG-89090-12	04/04/2011	04/20/2011	04/25/2011	125	<input type="text" value="125"/>	<input type="text" value="68990789"/>	<input type="text"/>	
KCD3TPPCNAP5	ADG-89090-12	04/04/2011	04/20/2011	04/25/2011	125	<input type="text" value="125"/>	<input type="text"/>	<input type="text"/>	
KCD3TPRCNANH	ADG-89090-12	04/04/2011	04/20/2011	04/25/2011	125	<input type="text" value="125"/>	<input type="text"/>	<input type="text"/>	
KCD3TPSCNAHC	ADG-89090-12	04/04/2011	04/20/2011	04/25/2011	100	<input type="text" value="100"/>	<input type="text"/>	<input type="text"/>	
KCD3TPBCNAAJ	ADG-89090-12	04/04/2011	04/20/2011	04/25/2011	125	<input type="text" value="125"/>	<input type="text"/>	<input type="text"/>	FGH-786878
KCD3TPCCNAMP	ADG-89090-12	04/04/2011	04/20/2011	04/25/2011	125	<input type="text" value="125"/>	<input type="text"/>	<input type="text"/>	KG-786878

Sorted by: Supplier Item No., Reqd Ship, Card ID 1 to 10 of 10

Ship | Attach Notes | Back To Items | Change Filter

- In the above example the user is shipping the card that is not printed.
- The following result screen shows the warning that card has been shipped but the label has not been printed yet.

**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

	Card ID	Supplier Item No.	Description	Printed
<input checked="" type="checkbox"/>	KCD3TPPCNAJ6	ADG-89090-12	Card Successfully Shipped and Not Printed.	No

[Print Cards | >>](#)













- Select the card and click print cards to print the label
- The label will be printed on the respective printers – thermal or laserjet. Customer can develop a set of labels and assign specific labels to respective suppliers. Their assigned label with the relevant data will be printed as shown below

<p>PART NO. <b>ADG-89090-12</b></p>  <p>PART DES Rotor 125-12</p>	<p>MFG DAT <b>04/05/2011</b></p> <p>ORIGIN <b>USA</b></p> <p>REVLTR <b>Rev</b></p>
<p>QUANTIT <b>125</b></p> 	<p>PURCHAS ORDER N </p>
<p>SUPPLIER <b>XYZ Supplier</b> <b>345 Major</b> <b>Louisville, KY - 79018</b></p>	<p>DELIVERY LOCATION Plant One 1900 Evergreen Parkway Lebanon, MD - 65536</p>
<p>Kanban Card #  <b>KCD 3TP PCN AJ6 - 001 - 0</b></p>	

## Visual Supply Chain board

- The entire flow described in the sections above can be visually tracked using this board. To get to it
  - Click Reports
  - Select Buyer Status from Buyer Reports menu list
  - Select the supplier and click Go
  - Following board is displayed

## Buyer Status Report

RYG ▾	Item ▾	On Hand 		Released 		In Process 		At Ship Hub 		In Transit 		Received At Dock 		Put Away 		Others 	
		Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty
	003-0815-00	24	35,650.00	0	0.0	4	6,000.00	6	9,000.00	5	7,500.00	6	9,000.00	2	3,000.00	0	0.0
	510-0541-30	11	7,920.00	0	0.0	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.0
	510-0541-31	5	3,600.00	0	0.0	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.0
	003-0816-00	58	116,000.00	2	4,000.0	2	4,000.00	4	8,000.00	0	0.00	0	0.00	0	0.00	0	0.0



Sorted by:

- You can see for each items how many cards (orders) in each of the states. Both the buyer and supplier will have the same view. The different states are
  - ON HAND – This denotes the material that is on hand ready for consumption at the customer side (Normal wait in this state is the order cycle time – Lot Size/average usage per day)
  - RELEASED – This denotes that card (order) has been sent to the suppliers electronically but they have not yet acknowledged or accepted the order (Normal wait in this state is 24hrs to 48 hours)
  - IN PROCESS – This denotes that the cards (orders) are accepted and waiting for manufacturing to be completed. (Normal wait in this state is supplier’s lead time)
  - AT SHIP HUB – This is an optional state. If the supplier is consolidating the shipments either by themselves or through logistics providers, then this flag is set. When the supplier completed production, he prints the label and moves it to Ship Hub (Wait time in this state can vary depending on the business process)
  - IN TRANSIT – This denotes that the goods are in transit (Air, Rail, Road). During this time customers should be able to track the shipment using transportation provider’s website. (Normal wait time in this state is Supplier’s Transit time)
  - RECEIVED AT DOCK – This denotes that goods have been received at the customer site and is waiting for INSPECTION. (Wait time at this state can vary based on business process)
  - PUT AWAY – This denotes that the material is ready to put away to its location or point of use. (Normal wait is less than 24 hours)
  - OTHERS – This denotes the cards are in one of the intermediate states. Some common intermediate states are:
    - Waiting for P.O. from ERP
    - Waiting for approval from buyer for reschedule
    - Waiting for approval from supplier for reschedule or recall
- When you select a specific item then all the cards associated with that item at every state is displayed as shown below.

**Card Details: KCD2X74CNAQ4**

Card Qty	1,500.00
Release Date	03/24/2011
Accept Date	05/11/2011
Ship Date	05/30/2011
Req Ship Date	04/04/2011
PO Number	009047
PO Line Number	0
Release Number	
Release Line Number	
Expected Receive Date	06/01/2011
Supplier	Bettcher Mexico
Ship Qty	1,500.00
Tracking No	3456789
Received Qty	1,500.00
Receive Date	05/30/2011
Last Action By	ultrivauser
Work Order Number	898980
Notes	

**On Hand**

**Released**

**In Process**

**At Ship Hub**

**In Transit**

**Rec'd At Dock** 6 (Cards) 9,000 (Units)









**Put Away** 2 (Cards) 3,000 (Units)

**Others** 0 (Cards) 0 (Units)

- In addition by placing the cursor on a specific card, all the details associated with card will be displayed. For e.g.
  - o A card in on-hand state will show the last received date, who received it and quantity received
  - o A card in Released state will show the release date, required ship date, required receive date, order quantity and supplier name
  - o The card is actually a smart card as it accumulates more information as it goes through different states. Thus a card in In Process state will show additionally accepted date
  - o A card in In Transit state will additionally show actual ship date, actual ship quantity and tracking number.
  - o A card in Received at Dock state will actual receipt date, receipt quantity etc. as you can see in the above screen

## Supplier Reports

▼ **Supplier Reports**

 <b>Supplier Status</b> Shows distribution of Card for each Item.	 <b>Consolidated Demand</b> View Consolidated Demand Report
 <b>Excel Reports</b> View & Export data to Excel	 <b>Supplier Performance</b> Track Supplier on time performance
 <b>Supplier On-Time</b> Track Supplier on time shipment/Receipt performance	 <b>Cycle Time</b> Compare actual lead times with negotiated lead times
 <b>OnHand Inventory</b> View Inventory Status Report	 <b>Outstanding Shipments</b> View a list of orders that are due on or before today

### Key points on documentation structure:

*The screen shot shown under each report is what the users will see when they click on the respective reports listed above*

*The first screen typically is the Report Filter screen to input the selection criteria. The follow up screens are the result of button clicked on the previous screen. For e.g. clicking on “Show Report” button transitions the user from the “Filter” screen to respective report screen.*

*The additional drill downs are available for certain reports where the navigation may be:*

- *Supplier level summary*
  - *Item level details*
  - *Card level details*
-

## Supplier Status

Supplier Status Report <span style="float: right;">How do I? ↑</span>																				
Plant Scroll Compressors			Show Items List			Category All			RYG All			Filter By			Select Operator		Enter Value		Go	
RYG ▾	Supplier Item No. ▲	Description ▾	Min Order Cards	On Hand		Released		In Process		At Ship Hub		In Transit		Received At Dock		Others				
				Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty			
	047-2036-00	Rotor	0	0	0.00	0	0.0	3	420.00	0	0.00	1	160.00	0	0.00	0	0.0			
	047-2036-01	Rotor	0	0	0.00	0	0.0	4	520.00	0	0.00	1	160.00	0	0.00	0	0.0			
	047-2036-03	Rotor	0	0	0.00	0	0.0	2	320.00	0	0.00	0	0.00	0	0.00	0	0.0			
	047-2036-04	Rotor	0	14	0.00	0	0.0	12	1,920.00	0	0.00	0	0.00	0	0.00	0	0.0			
	047-2036-05	Rotor	0	0	0.00	0	0.0	3	480.00	0	0.00	2	320.00	0	0.00	0	0.0			

Sorted by: Supplier Item No. 1 to 5 of 315 Prev Page 1 Next

This report is similar to Buyer status report described at the beginning of this document. Only the supplier can see this report for the parts that he is supplying to the customer... [More details](#)

RYG ▾	Supplier Item No. ▲	Description ▾	Min Order Cards	On Hand		Released		In Process		At Ship Hub		In Transit		Received At Dock		Others	
				Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty
	047-2036-00	Rotor	0	0	0.00	0	0.00	3	420.00	0	0.00	1	160.00	0	0.00	0	0.00
	047-2036-01	Rotor	0	0	0.00	0	0.00	4	520.00	0	0.00	1	160.00	0	0.00	0	0.00
	047-2036-03	Rotor	0	0	0.00	0	0.00	2	320.00	0	0.00	0	0.00	0	0.00	0	0.00
	047-2036-04	Rotor	0	14	0.00	0	0.00	12	1,920.00	0	0.00	0	0.00	0	0.00	0	0.00
	047-2036-05	Rotor	0	0	0.00	0	0.00	3	480.00	0	0.00	2	320.00	0	0.00	0	0.00

Sorted by: Supplier Item No. 1 to 5 of 315 [Prev](#) [Page 1](#) [Next](#)

- Late - Note - Not Printed

<b>On Hand</b>	0 (Cards) 0 (Units)
<b>Released</b>	0 (Cards) 0 (Units)
<b>In Process</b>	3 (Cards) 420 (Units) 
<b>At Ship Hub</b>	0 (Cards) 0 (Units)
<b>In Transit</b>	1 (Cards) 160 (Units) 
<b>Others</b>	0 (Cards) 0 (Units)

## Consolidated Demand

The focus of this report is to show the supplier a consolidated view of all his demands (orders) across multiple plants from a single customer. The supplier logs in to a single portal but can see all his orders even if they are from multiple ERP systems

Consolidated Demand View <span style="float: right;"><a href="#">Views</a> <a href="#">How do I?</a></span>				
Supplier Item No. ▲	Total Qty	Total Orders ▾	Earliest Req Ship Date ▾	Is order late? ▾
003-0815-00	22,500	15	02/18/2011	
003-0816-00	14,000	7	02/16/2011	
003-1287-00	7,448	7	02/16/2011	
505-0802-08	36	1	02/10/2011	
505-0901-03	288	9	02/09/2011	
505-0901-04	480	15	02/09/2011	

Sorted by: Supplier Item No 1 to 6 of 6

Supplier can view by item number the units to be manufactured to fulfill their orders.

By clicking on the item number, the system shows the shipping schedule for these orders. The supplier can export this data and use it directly in production.

Consolidated Demand Report																
Supplier: <b>Bettcher Mexico</b> Supplier Item No: <b>003-0815-00</b> Reqd ShipDate Between <b>03/31/2011</b> and <b>04/06/2011</b>																
Buyer Name	OverDue		03/31		04/01		04/02		04/03		04/04		04/05		04/06	
	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty
Compressors ALL	1.0	1,500.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Scroll Compressors	1.0	1,500.0	8.0	12,000.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.0	4,500.0

1 to 2 of 2

This would be a near impossible task in a non-Ultriva environment where they will be receiving discreet paper P.Os.

## Excel Reports

### Excel Reports

[How do I?](#)

---

**Card History**

\* Date Range:

Plant:

Product Line:

Commodity Code:

Item No:

Action:  ▼

[Show Report | >>](#)

---

**Item Usage Filter**

Plant:

Show Item Usage for:

Year To Date

Last Year

Last 12 Months

[Show Report | >>](#)

---

\* Required Field



These reports are the same as described earlier in the buyer reports section; the only difference is this report is generated only for the items being supplied by this vendor. More details....

## Supplier Performance

Same details as explained in the Buyer reports section with the filter being set for this supplier only. [More details....](#)

### Supplier Performance Report How do I?

\* Date Range:

Show Performance for:  Shipment Accuracy  Receipt Accuracy

Tolerance:  Ignore  Tolerance  days

[Show Report | >>](#)

\* Required Field

### Supplier Performance By Plant How do I?

[Change Filter](#)

Supplier: [Bettcher Mexico](#), Date Range: [01/01/2010-12/31/2010](#), Show Performance for: [Shipment Accuracy](#), Early Tolerance: [Ignore](#)

Plant Name ▲	Cards To Be Shipped ▼	Shipped Cards ▼	Shipped Cards On Time ▼	Delivery Performance ▼	Suggestion
Compressors ALL	74	74	49	66.22	
Scroll Compressors	326	326	267	81.90	
Sidney Scroll	18	18	14	77.78	
<b>Total</b>	<b>418</b>	<b>418</b>	<b>330</b>	<b>78.95</b>	

Sorted by: Business Name 1 to 3 of 3

### Supplier Performance By Item No How do I?

[Change Filter](#) | [Back to Summary](#)

Plant: [Scroll Compressors](#), Date Range: [01/01/2010-12/31/2010](#)

Item ▲	Cards To Be Shipped ▼	Shipped Cards ▼	Shipped Cards On Time ▼	Delivery Performance ▼	Suggestion
003-0815-00	190	190	152	80.00	
003-0816-00	83	83	63	75.90	
003-1287-00	53	53	52	98.11	
<b>Total</b>	<b>326</b>	<b>326</b>	<b>267</b>	<b>81.90</b>	

Sorted by: Item 1 to 3 of 3

Suppliers Performance Report By CardID						Views	How do I?
Plant: Scroll Compressors, Item No: 003-0815-00, Date Range: 01/01/2010-12/31/2010						Change Filter	Back to Summary
Card ID ▲	CycleNo ▼	Reqd Ship ▼	Ship Date ▼	On Time ▼			
KCD2QZ8CNAUG	2	09/01/2010	08/27/2010				
KCD2QZ8CNAUG	4	10/02/2010	09/29/2010				✓
KCD2QZ8CNAUG	7	11/23/2010	11/23/2010				✓
KCD2QZ8CNAUG	6	11/09/2010	11/09/2010				✓
KCD2QZ8CNAUG	5	10/13/2010	10/12/2010				✓
KCD2QZ8CNAUG	8	12/08/2010	12/08/2010				✓
KCD2QZ8CNAUG	1	06/11/2010	06/03/2010				✓
KCD2QZ8CNAUG	3	09/08/2010	09/09/2010				✗
KCD2QZ9CNA3D	3	09/15/2010	09/13/2010				✓
KCD2QZ9CNA3D	2	09/01/2010	08/27/2010				✓

Sorted by: Card ID 1 to 10 of 190 [Prev](#) [Page 1](#) [Next](#)

## On-time Shipment

Suppliers will be able to see their performance by individual plants.

### On Time Shipment

How do I?

\* Date Range:

\* Plants:

Report Type:

Early Tolerance:  Ignore  Tolerance  days

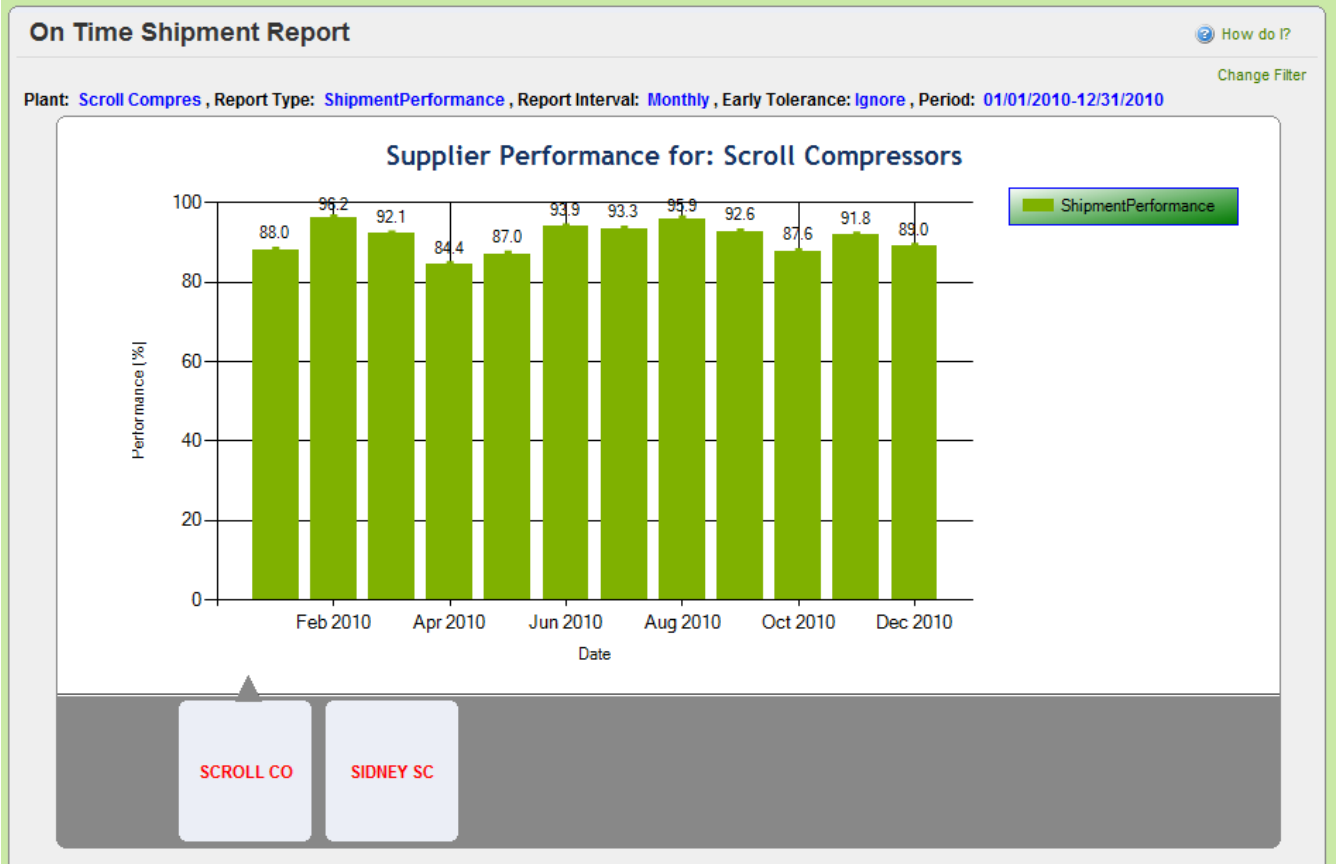
Report Interval:

[Show Report >>](#)

\* Required Field

They can continuously monitor the performance without having to depend on the customer's report. Both the supplier and customer will be looking at same set of data and therefore dealing with one version of truth.

Since the suppliers can measure they can improve their performance on an ongoing basis. [More details...](#)



## Outstanding Shipment

This report can be used to look at the pending shipments.

### Outstanding Shipment Report

Plant:

[Show Report | >>](#)

### Outstanding Shipment Report















Supplier: Bettcher Mexico, Plant: Selected, On Date: 03/31/2011

Item	SupplierName	Plant Name	Total Orders	Total Units	Orders Due	Units Due	15+ days Older Orders	15+ days Older Units	30+ days Older Orders	30+ days Older Units
003-0816-00	Bettcher Mexico	Scroll Compressors	4	8,000.00	3	6,000.00	0	0.00	0	0.00
003-0815-00	Bettcher Mexico	Scroll Compressors	14	21,000.00	1	1,500.00	0	0.00	0	0.00
<b>Total</b>			<b>18</b>		<b>4</b>		<b>0</b>		<b>0</b>	

Sorted by: Orders Due

1 to 2 of 2

## Supplier Actions - Reference Guide

Supplier Actions	
 <b>Accept</b> View and acknowledge new kanban orders	 <b>Ship</b> View the list of acknowledged kanban Cards. Use this screen to indicate the Cards you are shipping. If you have not printed kKanban labels already, you can do that here too
 <b>Consolidator Ship</b> 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	 <b>Supplier Queue</b> Shows distribution of Card States for each Item
 <b>Recall</b> 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	 <b>Reschedule Request</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
 <b>Production Sequence</b> View list of orders to complete production. Use this screen to complete production for the pending orders.	 <b>Print Cards</b> View the list of acknowledged kanban Cards. Use this screen if you want to print labels before you are ready to ship
 <b>Print Duplicate Cards</b> View the list of printed kanban Cards. Use this screen if you want to print duplicate labels	 <b>Set Tracking No.</b> View the list of shipped kanban Cards. Use this screen to update the tracking number for the shipped Cards.
 <b>Set WorkOrder No.</b> View the list of acknowledged kanban Cards. Use this screen to update the workorder number for the acknowledged Cards	 <b>Resequence Production Orders</b> View list of orders to complete production. Use this screen to resequence the orders for production
 <b>Master Label</b> Create master label for shipment	 <b>Add Notes</b> Add notes to one or more Cards in cycle

### Key points on documentation structure:

*The screen shot shown in each “Purpose” is what the users will see when they click on the Action screen above*

*There may be multiple screens depending on the level of details. The follow up screen is the result of button clicked on the previous screen. For e.g. Clicking on “Show Cards” button transitions the user from the “Item List” screen to “Card List” screen.*

*The screen shot shown in each “Results” is the response screen in Ultriva for the action taken*

*The screen shot shown in each “Exceptions” highlights the exceptions if any*

---

## Accept

### Purpose:

This action allows the supplier to accept the Kanban signal and/or Purchase order. Supplier will be able to view the P.O. prior to accepting the order. Supplier can also attach notes while accepting the order.

**Accept Items List** Filters [How do I?](#)

Plant: Scroll Compressors    Cards: All    Show: Items List    Category: All    RYG: All

Filter By:    Select Operator:    Enter Value:   

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

RYG	Supplier Item No.	Description	Wait For PO		Runline		Released		Reschedule Approval		Recall Wait		Total	
			Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty
	003-0815-00	Lower Bearing Plate	0	0.00	0	0.00	9	13,500.00	0	0.00	0	0.00	9	13,500.00
	003-0816-00	Lower Bearing Plate	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	13	21,500.00	0	0.00	0	0.00	13	21,500.00

**Accept Cards List** Views [How do I?](#)

Find Card ID:

Work Order Number:

	Card ID	Supplier Item No.	Release Date	Reqd Ship	Reqd Receive	Card Qty	PO #	PO Line #	WorkOrder No.
<input checked="" type="checkbox"/>	KCD2X8LCNAD2	003-0816-00	03/22/2011	03/29/2011	03/31/2011	2,000	008312	0	BM-28909
<input checked="" type="checkbox"/>	KCD3FWRCNAAH	003-0816-00	03/22/2011	03/29/2011	03/31/2011	2,000	008312	0	BM-78989
<input type="checkbox"/>	KCD2X8TCNAJJ	003-0816-00	03/22/2011	03/29/2011	03/31/2011	2,000	008312	0	
<input type="checkbox"/>	KCD3TP7CNAFY	003-0816-00	03/30/2011	04/06/2011	04/08/2011	2,000	468678	0	

### Results:

The card (or order) moves from RELEASED to IN PROCESS state when the supplier accepts the card.

**Accept Cards Results** [How do I?](#)

Following cards were successful

Card ID	Supplier Item No.	Description
KCD2X8LCNAD2	003-0816-00	Card successfully accepted.
KCD3FWRCNAAH	003-0816-00	Card successfully accepted.

If the supplier clicks PRINIT PO button then they will be able to see the P.O. and print them.

**ULTRIVA**  
 1900 Evergreen Parkway  
 Lebanon, MO 65536  
 PHONE: (507) 847-2690

**PURCHASE ORDER**  
 468678

**VENDOR:**  
 Bettcher Mexico  
 6001 South 35th Street  
 Suite D  
 McAllen, TX 78503

**SHIP TO:**  
 Scroll Compressors  
 Lebanon  
 1900 Evergreen Parkway  
 Lebanon, MO 65536

**VENDOR CONTACT:**  
 Heidi Julian

**BILL TO:**  
 Scroll Compressors  
 Lebanon  
 1900 Evergreen Parkway  
 ATTN: ACCOUNTS PAYABLE  
 Lebanon, MO 65536

**PHONE:** 011-52-899-929-0805 ext. 3025      **FAX:**

P.O.Date	VENDOR	SHIP VIA	F.O.B	TERMS	DEL DATE
2011-03-30	70126	UPS/Concentrek		NET 30 DAYS	SEE BODY

BUYER: Jim Davis  
 PHONE # 417-588-8626      FAX # 507-847-7545

	QUANTITY	U/M	UNIT PRICE	AMOUNT
003-0816-00 Per Drawing - A Lower Bearing Plate VENDOR ITEM # 003-0816-00 Inspect Upon Receipt CARD ID # KCD3TP7CNAFY5	2000	EA	0.41	\$20.00

DUE ON DOCK 2011-04-08

**Exception:**

Customer may require the supplier to accept the orders within a specified time (24 hours or 48 hours). Noncompliance of this time line can result in a notification being generated back to the buyer.

Customer may also flag the supplier to auto accept the orders. In such cases suppliers are not required to perform this action.

Suppliers may not be able to accept the order under two conditions:

- Cards (orders) are waiting in runline (minimum order quantity) to be reached
- Cards are waiting for P.O. to be generated by the ERP system

In both such instances, supplier will have visibility to the pending orders but will not be able to Accept them

**Ship**

**Purpose:**

This action allows the suppliers to ship goods when they are ready. Only orders that are accepted by the suppliers will be allowed to ship. The supplier can ship one or multiple orders. The following data can be entered while shipping:

- Select Shipment Carrier from an approved list
- Enter the Tracking Number for the shipment
- Enter the charge number (or traceability number)
- Enter the packing slip number if necessary
- Change the ship quantity if necessary

- Attach notes or certificates if necessary
- After successful shipment, they can print the shipping label as well

### Ship Items List

Filters Views How do I?

Plant: Scroll Compressors Cards: All Show: Items List Category: All RYG: All

Filter By: Select Operator: Enter Value: Go

Show Cards | >

RYG	Item	Description	Total Cards	Total Qty
003-0815-00		Lower Bearing Plate	6	9,000.00

### Ship Cards List

Views How do I?

Find Card ID: Ship | >> Attach Notes | >> << | Back To Items << | Change Filter

Tracking No.: 5678878889 Carrier: NON-ETD Packing Slip No.: T-799090 Charge No.: KSG-90

Card ID	Supplier Item No.	Release Date	Reqd Ship	Reqd Receive	Card Qty	Ship Qty	Packing Slip No.	Charge No.	PO #
KCD3FWFCNAG9	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500	1500	T-799090	KSG-90	009047
KCD3FWNCNABA	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500	1500	T-799090	KSG-90	009047
KCD3FWBCNANJ	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500	1500			009047
KCD3FWACNADY	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500	1500			009047
KCD3FWMCNAQ8	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500	1500			009047
KCD2X6WCNAWZ	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500	1500			009047

Sorted by: Supplier Item No., Reqd Ship, Card ID 1 to 6 of 6

Ship | >> Attach Notes | >> << | Back To Items << | Change Filter

**Results:**

Once the shipment is successful, the system takes the user to print label screen. A successful shipment will move the order from In Process to In Transit stage.

Ship Cards Results					
					<a href="#">How do I?</a>
					<a href="#">«   Back To Items</a>
2 card(s) have been shipped without printing. Please immediately print the card(s) by clicking Print Cards button					
	<input type="checkbox"/>	Card ID	Supplier Item No.	Description	Printed
	<input type="checkbox"/>	KCD3FWFCNAG9	003-0815-00	Card Successfully Shipped and Not Printed.	No
	<input type="checkbox"/>	KCD3FWNCNABA	003-0815-00	Card Successfully Shipped and Not Printed.	No
<a href="#">Print Cards   &gt;</a>					

**Exception:**

If Consolidator Ship flag is enabled, then the order is moved from In Process to “Consolidator ship” instead of “In Transit”.

## Consolidator ship

**Purpose:**

Some customers use consolidators for supplier shipment. When the Item is mapped to a supplier, a flag can be set in Ultriva which identifies that the supplier shipments for that part will be consolidated. It lets the supplier to indicate that the goods are ready for pick up by shipping the goods in Ultriva. The flag retains the order in the consolidator ship state till it is picked up by consolidators and moved to In Transit stage. This action can be performed manually or through a scanner

**Results:**

This action moves the order from Consolidator ship to In Transit state.

**Exception:**

If Consolidator Ship action is not completed while picking up shipped goods, the orders cannot be received at the dock.

## Supplier Queue

**Purpose:**

This is a report of items that the supplier is supplying. It shows the current states of all the associated cards/orders for each item.



### Supplier Queue Items List

Plant: Scroll Compressors | Show: Items List | Category: All | RYG: All

Filter By: | Select Operator: | Enter Value: | Go

RYG	Supplier Item No.	Description	Min Order Cards	On Hand		Released		In Process		At Ship Hub		In Transit		Received At Dock		Other
				Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	
	003-0815-00	Lower Bearing Plate	0	38	56,571.00	9	13,500.00	3	4,500.00	1	1,500.00	2	3,000.00	1	1,500.00	0
	003-0816-00	Lower Bearing Plate	0	65	130,000.00	2	4,000.00	2	4,000.00	0	0.00	0	0.00	0	0.00	0
	003-1287-00	Lower Bearing Plate	0	23	24,472.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0

**Results:**

None

**Exception:**

None

## Recall

**Purpose:**

This action allows the supplier to recall an order if it is wrongly shipped. When clicked it shows the filter condition to search and then list the items for which cards/orders that have been shipped but not yet received. Supplier can select the item and see all the cards/orders. They can select one or more cards/orders and recall them.

### Recall Items List

Plant: Scroll Compressors | Cards: All | Show: Items List | Category: All | RYG: All

Filter By: | Select Operator: | Enter Value: | Go

Show Cards | >>

RYG	Item	Description	Total Cards	Total Qty
	003-0815-00	Lower Bearing Plate	2	3,000.00

### Recall Cards List

Views How do I?

Find Card ID

	Card ID ▲	Supplier Item No. ▲	Release Date ▼	Reqd Ship ▲	Reqd Receive ▼	Card Qty ▼	ShipQty ▼	PO # ▼	PO Line # ▼	Release # ▼	Release Line # ▼
	KCD3FWFCNAG9	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500	1,500	009047	0		
	KCD3FWNCNABA	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500	1,500	009047	0		

**Results:**

The Card/Order will be moved back from In Transit (or Consolidator Ship) to In Process state

### Recall Cards Results

How do I?

Following cards were successful

Card ID	Supplier Item No.	Description
KCD3FWFCNAG9	003-0815-00	Card Successfully Recalled.

**Exception:**

If the card is already received, it cannot be recalled.

## Reschedule Request

**Purpose:**

Supplier can request a reschedule of an order via Ultriva. Only a date change for Required Ship Date is allowed. When Supplier requests this, a notification is sent to the buyer to approve or reject.







### Reschedule Request Items List

Filters Views How do I?

Plant: Scroll Compressors | Cards: All | Show: Items List | Category: All | RYG: All

Filter By:  Select Operator:  Enter Value:

RYG	Item	Description	Total Cards	Total Qty
	003-0815-00	Lower Bearing Plate	4	6,000.00

Reschedule Request Cards List									
Find Card ID <input type="text"/>  <span style="float: right;">Reschedule   » Attach Notes   » «   Back To Items «   Change Filter</span>									
New Required Ship date: <input type="text" value="03/30/2011"/> 									
▼	<input type="checkbox"/>	Card ID ▲	Supplier Item No. ▲	Release Date ▼	Reqd Ship ▲	Reqd Receive ▼	Qty On Card ▼	Card Qty ▼	New Reqd Ship Date
	<input checked="" type="checkbox"/>	KCD3FWBCNANJ	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500.00	1,500	<input type="text" value="4/15/2011"/>
	<input type="checkbox"/>	KCD3FWACNADY	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500.00	1,500	<input type="text" value="03/31/2011"/>
	<input type="checkbox"/>	KCD3FWMCNAQ8	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500.00	1,500	<input type="text" value="03/31/2011"/>
	<input type="checkbox"/>	KCD2X6WCNAWZ	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500.00	1,500	<input type="text" value="03/31/2011"/>

**Results:**

When the request is initiated, the card/order is moved from In Process to wait for approval state. If the buyer approves, then the required ship date is changed and the card is moved back to In Process state. If the buyer rejects then the card is just moved back to In Process state and the original required ship date is retained

Reschedule Request Cards Results			
 How do I?			
<span style="background-color: #4F81BD; color: white; padding: 2px 5px;">«   Back To Items</span>			
Following cards were successful			
Card ID	Supplier Item No.	Description	
 KCD3FWBCNANJ	003-0815-00	Please call the Buyer <b>Jim Davis</b> and request that he/she approve the Promise Ship Date changes.	

**Exception:**

If the buyer does not approve or reject then the card/order will be hanging. Supplier will not be able recall the request of ship the goods.

## Production Sequence

**Purpose:**

This action is primarily for a supplying work center and not for external supplier. This action provides a list of orders/jobs waiting for production. The jobs are sequenced on a daily basis optimized by predefined sort condition. This screen allows the supervisor to reschedule, re-sequence and reset the production. This screen allows operator to start a job, put the job on hold, complete the job and close production.

If OEE flag is enabled, this screen allows operators to perform multiple operations in sequence before completing production.

[REFER TO LFM USER GUIDE FOR DETAILS](#)

**Results:**

Depending on the type of action, several results are possible. The most common are changing of schedule date, operation completion, order completion and scrap accounting

**Exception:**

Again several exception can take place depending on the task. For details refer to Lean Factory Management (LFM) user guide.

## Print Cards

**Purpose:**

In a typical order flow, Ultriva allows the supplier to print a shipping label as soon as the ship transaction is completed. However there may be other reasons why supplier may need to print the labels before are after the shipping. One primary reason is:

- Supplier is shipping from stock and wants to print the labels first and use it as a pick list

When clicked on this action the list will show only cards that are In Process or In Transit and those that have not been printed before

The screenshot shows the 'Print Items List' interface. At the top, there are several filter dropdowns: Plant (Scroll Compressors), Cards (All), Show (Items List), Category (All), and RYG (All). Below these are input fields for 'Filter By', 'Select Operator', and 'Enter Value', along with a 'Go' button. A search bar labeled 'Find Supplier Item No.' is also present. A 'Show Cards' button is located on the right side of the interface. The main part of the screenshot is a table with the following data:

RYG	Item	Description	Total Cards	Total Qty
	003-0815-00	Lower Bearing Plate	6	9,000.00
	003-0816-00	Lower Bearing Plate	2	4,000.00

**Print Cards List** Views [How do I?](#)

Find Card ID  
[Print](#) | [Print PO](#) | [Back To Items](#) | [Change Filter](#)

<input type="checkbox"/>	Card ID ▲	Supplier Item No. ▲	Release Date ▼	Reqd Ship ▲	Card State ▼	Card Qty ▼	PO # ▼	PO Line # ▼
<input checked="" type="checkbox"/>	KCD3FWFCNAG9	003-0815-00	03/24/2011	03/31/2011	In Process	1,500	009047	0
<input checked="" type="checkbox"/>	KCD3FWNCNABA	003-0815-00	03/24/2011	03/31/2011	In Transit	1,500	009047	0
<input checked="" type="checkbox"/>	KCD3FWACNADY	003-0815-00	03/24/2011	03/31/2011	In Process	1,500	009047	0
<input checked="" type="checkbox"/>	KCD3FWMCNAQ8	003-0815-00	03/24/2011	03/31/2011	In Process	1,500	009047	0
<input checked="" type="checkbox"/>	KCD2X6WCNAWZ	003-0815-00	03/24/2011	03/31/2011	At Consolidator	1,500	009047	0
<input checked="" type="checkbox"/>	KCD3FWBCNANJ	003-0815-00	03/24/2011	04/15/2011	In Process	1,500	009047	0

Sorted by: Supplier Item No., Reqd Ship, Card ID 1 to 6 of 6

[Print](#) | [Print PO](#) | [Back To Items](#) | [Change Filter](#)

**Results:**

One or more cards can be printed. Multiple copies of the cards can also be printed

**Exception:**

Once it is printed it will not show up in this queue again

## Print Duplicate Cards

**Purpose:**

This action is only for printing duplicate cards for the following reasons:

- Label printed after shipping was lost and needs a duplicate label
- Printer problems can cause reprinting of the label

When clicked on this action the list will show only cards that are In Process or In Transit and those that have been printed before

**Results:**

Prints the label but puts duplicate on it.

**Exception:**

Only the labels that have been printed before will show up in the list

## Set Tracking No.

### Purpose:

Supplier can set the tracking number for the shipment when they perform the ship transaction in Ultriva. However in some cases the tracking number may not be available at that time. For such scenarios, suppliers can click this action and set the tracking number on the orders that are In Transit state

### Set Tracking Number Cards List

Views [How do I?](#)

[Set Tracking No](#) | [Attach Notes](#) | [Back To Items](#) | [Change Filter](#)

Tracking Number:  Packing Slip Number:

	Card ID	Supplier Item No.	CarrierTitle	Ship Date	Card Qty	ShipQty	Tracking No.	Packing Slip No.
	KCD3FWNCNABA	003-0815-00	Unknown	03/30/2011	1,500	1,500	456787	T-799090

### Results:

Sets the tracking number to the order and provides immediate visibility to the customer to facilitate shipment tracking

### Set Tracking Number Cards Results

[How do I?](#)

[Back To Items](#)

Following cards were successful

Card ID	Supplier Item No.	Description
KCD3FWNCNABA	003-0815-00	Tracking Number Successfully Updated.

### Exception:

None

## Set Work Order Number

### Purpose:

Supplier can add their internal work order number to the orders received from their customer. This is purely for traceability and has no other value.

**Set Work Order Number Cards List** Views [How do I?](#)

Find Card ID  
[Set WorkOrder No](#) | [Attach Notes](#) | [Back To Items](#) | [Change Filter](#)

Work Order Number:

<input type="checkbox"/>	Card ID ▲	Supplier Item No. ▲	Release Date ▼	Reqd Ship ▲	Reqd Receive ▼	Card Qty ▼	PO # ▼	PO Line # ▼	Release # ▼	Release Line # ▼	WorkOrder No.
<input checked="" type="checkbox"/>	KCD2X7ECNABV	003-0815-00	03/22/2011	03/29/2011	03/31/2011	1,500	009047	0			<input type="text" value="898980"/>
<input checked="" type="checkbox"/>	KCD2X74CNAQ4	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500	009047	0			<input type="text" value="898980"/>
<input checked="" type="checkbox"/>	KCD3FWFCNAG9	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500	009047	0			<input type="text" value="898980"/>
<input type="checkbox"/>	KCD2X76CNALB	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500	009047	0			<input type="text"/>
<input type="checkbox"/>	KCD2X7FCNAQP	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500	009047	0			<input type="text"/>
<input type="checkbox"/>	KCD3FWACNADY	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500	009047	0			<input type="text"/>
<input type="checkbox"/>	KCD3FWMCNAQ8	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500	009047	0			<input type="text"/>

Sorted by: Supplier Item No., Reqd Ship, Card ID 1 to 10 of 14 [Prev](#) [Page 1](#) [Next](#)

[Set WorkOrder No](#) | [Attach Notes](#) | [Back To Items](#) | [Change Filter](#)

**Results:**

Adds the work order number to that card cycle and retains the information in history tables

**Set Work Order Number Cards Results** [How do I?](#)

[Back To Items](#)

Following cards were successful

Card ID	Supplier Item No.	Description
KCD2X7ECNABV	003-0815-00	WorkOrder Number Successfully Updated.
KCD2X74CNAQ4	003-0815-00	WorkOrder Number Successfully Updated.
KCD3FWFCNAG9	003-0815-00	WorkOrder Number Successfully Updated.

**Exception:**

None

**Re-sequence production orders**

**Purpose:**

This is for internal supplying work center only and not for external supplier. This action allows the supervisor to reschedule and re-sequence production orders.

**REFER TO LFM USER GUIDE FOR DETAILS**

**Results:**

Schedule dates and production sequence for a specific day can be changed

**Exception:**

Refer to LFM user guide

## Master Label

**Purpose:**

The purpose of a Master Label is to print a consolidated label across multiple orders. Some common uses are:

- Customer orders in boxes while the supplier ships in a lot of 30 boxes.
- Supplier shrink wraps a pallet consisting of different part numbers for LTL carrier
- Supplier ships a truck load of parts to the customer

In all these instances a Master Label can be generated. When the customer receives the shipment they will have to scan only one label to receive:

- 30 boxes
- 1 pallet of different product mix
- Entire truck load of goods

**Master Label List For Scroll Compressors** How do I?

Plant: Scroll Compressors | Label Status: Created or Updated | Filter By: | Select Operator: | Enter Value: | Go

**Info** No Master Label(s) found in the system. Please click Add Master Label button to create one.

[Add](#)

**Create New Master Label** How do I?

Filter By: | Select Operator: | Enter Value: | Go

Find Card ID:  [Add](#) [Refresh](#) [Create New Master Label](#) [Back](#)

<input type="checkbox"/>	Card ID ▲	Supplier Item No. ▲	Release Date ▼	Req'd Ship ▲	Req'd Receive ▼	Plant Shipped ▼	Card Qty ▼	Ship Qty ▼	PO # ▼
<input checked="" type="checkbox"/>	KCD2X6PCNAT8	003-0815-00	03/24/2011	03/31/2011	04/04/2011	03/29/2011	1,500	1,500	009047
<input checked="" type="checkbox"/>	KCD2X6SCNA8A	003-0815-00	03/24/2011	03/31/2011	04/04/2011	03/29/2011	1,500	1,500	009047
<input checked="" type="checkbox"/>	KCD3FWFCNAG9	003-0815-00	03/24/2011	03/31/2011	04/04/2011	03/30/2011	1,500	1,500	009047
<input checked="" type="checkbox"/>	KCD3FWNCNABA	003-0815-00	03/24/2011	03/31/2011	04/04/2011	03/30/2011	1,500	1,500	009047

Sorted by: Supplier Item No., Req'd Ship, Card ID 1 to 4 of 4

[Create New Master Label](#) [Back](#)



### Ship Master Label MLB2223CNAT8 ? How do I?

Tracking No.  Carrier  Select Priority  Low  Medium  High Notes

Find Card ID  **Ship Master Label** << | Back

Card ID ▾	Supplier Item No. ▲	Card Qty ▲	Release Date ▾	Reqd Ship ▾	Plant Shipped ▾	Ship Qty ▾	PO # ▾
KCD2X6PCNAT8	003-0815-00	1,500	03/24/2011	03/31/2011	03/29/2011	1,500	009047
KCD2X6SCNA8A	003-0815-00	1,500	03/24/2011	03/31/2011	03/29/2011	1,500	009047
KCD3FWFCNAG9	003-0815-00	1,500	03/24/2011	03/31/2011	03/30/2011	1,500	009047
KCD3FWNCNABA	003-0815-00	1,500	03/24/2011	03/31/2011	03/30/2011	1,500	009047

Sorted by: Card Qty, Supplier Item No. 1 to 4 of 4

**Ship Master Label** << | Back

**Results:**

Master label will be created and printed

### Master Label List For Scroll Compressors ? How do I?

Master label MLB2223CNAT8 added Successfully ✕

Plant  Label Status  Filter By  Select Operator  Enter Value  **Go**

Label ID	Create Date	Created By	Last	Ship Master Label	Ship Failed Cards	al Cards	Cards failed to ship	Last Action Date
MLB2223CNAT8	03/30/2011	bmuser	bmuser	Created	4	0	03/30/2011	

Sorted by: Label ID 1 to 1 of 1

### Master Label MLB2223CNAT8 shipment results ? How do I?

Master Label shipped successfully ✕

**<< | Back**

Card ID	Supplier Item No.	Card Qty	Reqd Ship	ShipQty	PO #	PO Line #	Status Message
KCD2X6PCNAT8	003-0815-00	1,500	03/31/2011	1,500	009047	0	Successfully Shipped
KCD2X6SCNA8A	003-0815-00	1,500	03/31/2011	1,500	009047	0	Successfully Shipped
KCD3FWFCNAG9	003-0815-00	1,500	03/31/2011	1,500	009047	0	Successfully Shipped
KCD3FWNCNABA	003-0815-00	1,500	03/31/2011	1,500	009047	0	Successfully Shipped

**<< | Back**

**Exception:**

If additional items are put in a truck or removed from the truck after the master label has been printed, then the master label has to be recreated and printed. Otherwise at the receiving dock, there will be a discrepancy between receipt transaction and actual physical inventory.

## Add Notes

### Purpose:

Add Notes on the orders that are at In Process or In Transit state. Multiple notes can be added. This can be used as a mechanism to inform buyers the status of shipment.

RYG	Item	Description	Total Qty	Total Cards
	003-0815-00	Lower Bearing Plate	24,000.00	16
	003-0816-00	Lower Bearing Plate	8,000.00	4

Select card(s) and click attach notes. Select from list and click Submit.

Card ID	Item	Req'd Ship	Req'd Receive	Card Qty	PO #
KCD2X7ECNABV	003-0815-00	03/29/2011	03/31/2011	1,500	009047
KCD2X6S				1,500	009047
KCD2X74				1,500	009047
KCD3FWF				1,500	009047
KCD3FWN				1,500	009047
KCD2X76				1,500	009047
KCD2X7F				1,500	009047
KCD3FWA				1,500	009047
KCD3FWM				1,500	009047
KCD2X6R				1,500	009047

### Results:

The notes get attached to the card and can be viewed by other users who have access. Notification alerts can be created that can send emails to the respective users

## Add Notes Cards Results

[How do I?](#)

[← Back To Items](#)

Following cards were successful

	Card ID	Item	Description
	KCD2X6SCN48A	003-0815-00	Notes added Successfully.

Move the shipment by 7 days