



Product Release Notes

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# Ultriva 7.7 Release Notes

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Version 1.0


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## Revisions

Date	Modifications	Author	Comments
07/21/2014	Created	Rajan	
12/1/2014	Added P3 notes	Rajan	Check sections 2(enhancements) and 3(bug fixes).
02/03/2015	Added P4 notes	Rajan	Check sections 2(enhancements) and 3(bug fixes).
02/18/2015	Added P5 notes	Rajan	Check sections 2(enhancements).
03/09/2015	Added P6 notes	Rajan	Check sections 2(enhancements) and 3(bug fixes).
07/02/2015	Added P7 notes	Rajan	Check sections 2(enhancements) and 3(bug fixes).
08/14/2015	Added P8 notes	Rajan	Check sections 2(enhancements) and 3(bug fixes).
09/24/2015	Added P9 notes	Rajan	Check sections 2(enhancements) and 3(bug fixes).

## Symbol Legend

Symbol	Description	Location
	You wanted this feature!!!	Margin

## **1 Ultriva 7.7 Release Notes**

This new release contains enhancements and bug fixes as listed below

1. Supplier material status
2. Serial Tracking for items
3. Recall and Reschedule Supplier Configuration
4. Back Ordered Cards Custom Report Template
5. Report Scheduling
6. Material Deliver Scan action
7. Destination location control and Source location control for items
8. Certification Control for items
9. Pick List material selection and repacking at Item level
10. Notes and Attachment added to Spike Order Screen
11. Supplier Score Card Metrics – PPM
12. Replace Item

## 1.1 Supplier Material Status

Filter strip added to the screen

**Supplier Material Status** ▾

Plant:  Issue tracking:  Show:  Category:

Product Line:  Commodity Code:  Show Items:  Item no. starts with:

Filter By ▾ Select Operator ▾ Enter Value

Item  
Description

Item description added to the list

RYG ▾	Item ▾	Description ▾	No Of Customers ▾	Open Orders ▾	Open Order Qty ▾	Past Due Orders ▾	Past Due Qty ▾	Next Due Date ▾	On Order Trend
	M18193	0.75" Elbow (90 Degree)	2	2	8	2	8	03/24/2014	
	M51570	1.5" Valve	11	2	2	2	2	03/31/2014	
	20024049	1.5" End Cap with Bleed	12	2	16	2	16	03/31/2014	
	UC-3.0"EndCapwithBleed	3.0" End Cap with Bleed	2	1	8	1	8	03/31/2014	
	M18282	Pressure Gauge (0-30 psi)	3	1	5	0	0	03/31/2014	

Additional item details by clicking “View Details Button”

**Supplier Material Status** ▾

Plant:  Issue tracking:  Show:  Category:

Product Line:  Commodity Code:  Show Items:  Item no. starts with:

Filter By ▾ Select Operator ▾ Enter Value

## Open Orders Tab

**Item Details 1.5" Valve** [How do I?](#)

Item: M51570 Description: 1.5" Valve

Total Orders **2** Open Order Quantity **2** No Of Customers **11** Past Due Orders **2** Past Due Qty **2**

Open Orders

RYG ▾	Item ▾	Description ▾	PO # ▾	PO Line # ▾	Release # ▾	Plant ▾	Reqd Ship ▴	Card State ▾	Card Qty ▾
	M51570	1.5" Valve	0			B3B-3B129	03/31/2014	In Process	1
	M51570	1.5" Valve	0			B3B-3B129	03/31/2014	In Process	1

Sorted by: Reqd Ship 1 to 2 of 2

## Inventory Status Tab

- Late

- Note

- Not Printed

Group By: 

By Customer/Supplier

Customer Orders (In Process and Transit)

B3B-3B129	2 (Cards) 16 (Units)
B3B-3B110	0 (Cards) 0 (Units)
B3B-3B120	0 (Cards) 0 (Units)
	0 (Cards) 0 (Units)

Inventory On Hand

On Hand

1 (Cards) 15 (Units)

Supplier Orders

Data is not available

## 1.2 Serial Tracking for items

Added support for serial tracking for items

Item Setup Screen changes

Modify Item AS

Last modified on [06/06/2014] by [rajan t]

How do I?

Base Information

Supplier

Additional Information

UOM Information

Notes

Custom Field List

Item Information

\* Item No:

AS

\* Description:

asas

Campaign:

AS

\* Handling Time:

1

(in days)

Location Code:

ABC Code:

asas

\* Price Per UOM:

0

\* Category:

Kanban

\* Re-order cards when:

Open Box (First unit consumed)

Lot Number Tracking:

None

Serial Controlled:

☒

Certification Controlled:

None

Coordinator Information

## Ship Screen - Supplier

Ship Cards List

Views

How do I?

Find Card ID

Ship | »

Attach Notes | »

« | Back To Items

« | Change Filter

Tracking No.

Carrier

-- Select --

RYG	Card ID	Plant	Supplier Item No.	Description	Release Date	Reqd Ship	Card Qty	Ship Qty	Cleaned Date
	KCD5DF3TRAY4	WHSE121D	D155184P01	Accumulator	08/11/2011	08/16/2011 05:17:09 PM	4	4	
	KCD5DF9TRAX8	WHSE121D	D155184P01	Accumulator	09/09/2011	09/14/2011 03:28:16 PM	4	4	
	KCD5DFETRA64	WHSE121D	D155184P01	Accumulator	10/17/2011	10/20/2011 03:32:12 PM	4	4	
	KCD5DFATRAYP	WHSE121D	D155184P01	Accumulator	11/09/2011	11/14/2011 03:48:21 PM	4	4	

## Serial Entry Screen

Click on the **Serial Nos.** link

### 1.3 Recall and Reschedule Supplier Configuration

The recall and reschedule flag settings can be now inherited from the plant. In the earlier release these settings had to be configured for each supplier.

### 1.4 Back Ordered Cards Custom Report Template

Under the option **Reports, Custom Reports, Create Custom Report**, there is a new Kanban Report called **Back Ordered Cards Report**. This report can be used in conjunction with the Auto Pick List feature. The report gives the details of the orders for which the supplying work center does not have inventory. For this to work the following settings must to be set at the work center configuration

**Workcenter Configuration for: VDL RAW MAT \** Last modified on [06/27/2014] by [Nandu Gopalun]

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

**Configuration Settings**

Name	Value
Email Printing of Kanban Cards ?	<input type="button" value="OFF"/>
Print Kanban Card using Ultriva Software ?	<input checked="" type="button" value="ON"/>
Number of Label copies to Print ?	<input type="text" value="1"/>
Auto print cards that are to be printed ?	<input type="button" value="OFF"/>
Auto print cards interval (in minutes): ?	<input type="text" value="10"/>
Auto create pick list ?	<input checked="" type="button" value="ON"/>
Print cards action to print only picklist cards ?	<input checked="" type="button" value="ON"/>

The user must go to the Print Cards screen for this to work. Every time the page loads the pick list algorithm is run by the page and orders with “No Stock” details is written to the table as a batch Only one active batch is kept for a supplier. The report data comes from this active batch.

## 1.5 Report Scheduling

Now almost all of the inbuilt and custom reports can be scheduled. The user has the ability schedule a report to be run and delivered to his/her inbox.

**Suppliers Performance Report**

\* **Date Range:**

**Show Performance for:** ☐ Shipment Accuracy ☒ Receipt Accuracy ☐ Using Original Required Receive Date

**Early Tolerance:** ☒ Ignore ☐ Tolerance  days

**Late Tolerance:**  days

\* Required Field

Create Schedule for Suppliers Performance Report

How do I?

1. Set the Filter Condition

Date Range:

Today

Show Performance for:

☐ Shipment Accuracy
☒ Receipt Accuracy
☐ Using Original Required Receive Date

Early Tolerance:

☒ Ignore
☐ Tolerance

0

days

Late Tolerance:

0

days

2. Set the Schedule Frequency

Frequency:

☒ Daily
☒ Every weekday
☐ Weekly
☐ Every day
☐ Monthly

Start Date:

08/20/2014

Hour:

00

Exact start time will depend on the job queue activity.

☒ No End Date
☐ Set End Date

Report Format:

Excel attachment

?

Deliver to:

trajan

Additional users:

Report View:

Summary

Save | >

X | Cancel

## 1.6 Material Deliver Scan action

The suppliers can deliver the material to the buyer warehouse using this scan option. The system will receive the material and move the card from shipped state to received state.

Deliver Card(s) Scan

How do I?

Scan Input

To scan click in the Card Id box and start scanning

☐ Check this box to lock focus to the Card Id

Card Id:

Submit

Scan Results

Clear Status

## 1.7 Destination location control and Source location control for items

This feature is used for inter-org and intra-org material transactions, where the source and destination locator has been given for material flow. If the below settings are enabled then the locator data must be provided in the ship action.

**Destination location control:** This setting is available in the item setup screen under custom field list tab



## Modify Item 3014

Base Information	Supplier	Additional Information	UOM Information	Notes	Custom Field List
------------------	----------	------------------------	-----------------	-------	-------------------

IGParams

Name	Value
Sub Inventory:	<input type="text"/>
Adhoc receipts for Item:	<input type="radio"/> Enabled <input checked="" type="radio"/> Disabled
Order by lot size: ?	Inherit ▼
Internal Item number: ?	<input type="text"/>
Destination Location Controlled: ?	<input type="checkbox"/> OFF

**Source location control:** This setting is available in the item to supplier setup screen

**Edit Item 3014 mapped to Supplier WHSE121D** Last modified on [05/03/2013] by [rajan t] ⓘ How do I?

**Supplier Information**

* Supplier:	WHSE121D	* Supplier Item No.:	3014 ?
* Description:	PLASTIC BANDING	* Min. Order Cards:	0 ?
* Default Carrier:	-- Select -- ?	* Card Allocation:	100 (in %)
* Supplier User:	appuser x ?		

IGParams

Name	Value
Pick List material selection and repacking:	Inherit From Plant ▼
From Location:	<input type="text"/>
Source Location Controlled: ?	<input type="checkbox"/> OFF

\* Required field

**Ship Screen Changes:** User must input data for the “From location” and “To Location” fields.

**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

No.	Release Date	Reqd Ship	Reqd Receive	Card Qty	Ship Qty	Packing Slip No	Charge No	PO #	PO Line #	From Location	To Location
08/20/2014	08/20/2014	08/20/2014	1	1				0		1213 X	
08/20/2014	08/20/2014	08/20/2014	1	1				0			
08/20/2014	08/20/2014	08/20/2014	1	1				0			
08/20/2014	08/20/2014	08/20/2014	1	1				0			
08/20/2014	08/20/2014	08/20/2014	1	1				0			
08/20/2014	08/20/2014	08/20/2014	1	1				0			

## 1.8 Certification Control for items

This setting is available in the item setup screen, if enabled the supplier has to attach necessary documents while shipping.

**Modify Item 3014** Last modified on [08/20/2014] by [rajan t] How do I?

Base Information Supplier Additional Information UOM Information Notes Custom Field List

**Item Information**

* Item No:	3014	* Description:	PLASTIC BANDING
Revision No:		* Handling Time:	1 (in days)
Location Code:		ABC Code:	
* Price Per UOM:	61.35	* Category:	Kanban
* Re-order cards when:	Open Box (First unit consumed)	Lot Number Tracking:	None
Serial Controlled:	<input type="checkbox"/>	<b>Certification Controlled:</b>	None

## 1.9 Pick List material selection and repacking at Item level

The pick list algorithm allocates inventory for an order based on the following two settings “FIFO” or FIFO-NO repacking”. This setting can be either set at the plant or work center level. With this release now this setting can be set at the item level also.

This setting is available in the item to supplier setup screen for the work center:

**Edit Item 3014 mapped to Supplier WHSE121D** Last modified on [05/03/2013] by [rajan t] [How do I?](#)

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**Supplier Information**

\* Supplier: WHSE121D      \* Supplier Item No.: 3014 [?](#)

\* Description: PLASTIC BANDING      \* Min. Order Cards: 0 [?](#)

\* Default Carrier: -- Select -- [?](#)      \* Card Allocation: 100 (in %)

\* Supplier User: appuser x [?](#)

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IGParams

Name	Value
Pick List material selection and repacking:	Inherit From Plant <a href="#">?</a>
From Location:	<input type="text"/>
Source Location Controlled <a href="#">?</a>	<input type="button" value="OFF"/>

## 1.10 Notes and Attachment added to Spike Order Screen











User can now add Notes and Attachments for spike orders

**Spike Order Entry** [How do I?](#)

Category: Kanban Items      Supplier: WHSE121D      Enter by: Required Receive Date

Please leave blank for order details for integration to create orders in ERP.

0 [Add More Lines | >>](#) [Validate Entries | >>](#) [Submit Entries | >>](#)

Item No.	Description	Qty On Card	Number of Cards	Order Qty	Unit Price	PO #	PO Line #	Release #	Release Line #	Required Receive Date	Notes
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	 
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	 
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	 
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	 
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	 

0 [Add More Lines | >>](#) [Validate Entries | >>](#) [Submit Entries | >>](#)

## 1.11 Supplier Score Card Metrics - PPM

Supplier Rating Criteria is used to determine the Rating of the Supplier. We have preset descriptions and for each of those we need to set up what range falls in Red, Yellow or Green and how much Percentage of that is accounted for the Overall Rating.

To set up the Criteria use Admin - NCR Entities - Supplier Rating Criteria.

1. Early Tolerance and Late Tolerance are the no of days excepted either early or late for the due date
2. Weightage is How much Percentage of this will be considered for the overall rating which is 100%
3. Red, Yellow, Green – Are when the values fall in that specific range they are considered as that category.
4. We have 2 sets of ratings. Red to Green or Green to Red. Certain type of Ratings like (PPM – Parts per Million) are rated from Green to Red.
5. We can set up these criteria either in the System Admin level which means that it will be applied for all Business Units or at individual plant level.

Non Conformity SubType		Non Conformity Type		Audit Result		Process NC Code		System NC Code		Corrective Action		Disposition Code		Disposition Routing		Root Cause Code		Supplier Rating Criteria		Liability Code	
<b>Red to Green Ratings</b>																					
Description	Early Tolerance	Late Tolerance	Red		Yellow		Green		Weightage (in %)												
			From	To	From	To	From	To													
<input type="checkbox"/> Overall Rating	0	0	0	0	0	0	0	100.00													
<input checked="" type="checkbox"/> Delivery	0	0	0	50	50.01	70	70.01	100.00	10												
<input type="checkbox"/> Corrective Action Response	0	0	0	0	0	0	0	100.00	0												
<input type="checkbox"/> Quality	0	0	0	0	0	0	0	100.00	0												
<input type="checkbox"/> Escapes	0	0	0	0	0	0	0	100.00	0												
<input type="checkbox"/> Documentation	0	0	0	0	0	0	0	100.00	0												
<input checked="" type="checkbox"/> Shipment	0	0	0	50	50.01	50	50.01	100.00	50												
<input type="checkbox"/> Order Acknowledgement	0	0	0	0	0	0	0	100.00	0												
<b>Green to Red Ratings</b>																					
Description	Early Tolerance	Late Tolerance	Green		Yellow		Red		Weightage (in %)												
			From	To	From	To	From	To													
<input checked="" type="checkbox"/> Parts per Million (PPM)	0	0	0	50	50.01	2000	2000.01		40												

**Submit**

### NCR Data Load

Next we can use the data load tool to load the Non conformities reported on the Items received. Admin > Tools > Data Load > NCR Data Load.

Home | Material Status | Actions | Scan | Reports | Integration | Ultra User | Triumph Eng

Admin > Tools

**Tools**

**Kanban**

**Data Load**

- Supplier Data Load**  
Upload Supplier data
- User Load**  
Upload User Data
- Planned Orders Load**  
Upload Planned Order Data
- Item Data Load**  
Upload Item data
- Terms and Conditions**  
Upload Terms and Conditions data such as Payment, Delivery etc.
- Forecast Load**  
Upload Forecast Data
- Location Code Load**  
Upload Location Code Data
- BOM Data Load**  
Upload BOM Master Data
- NCR Data Load**  
Upload NCR

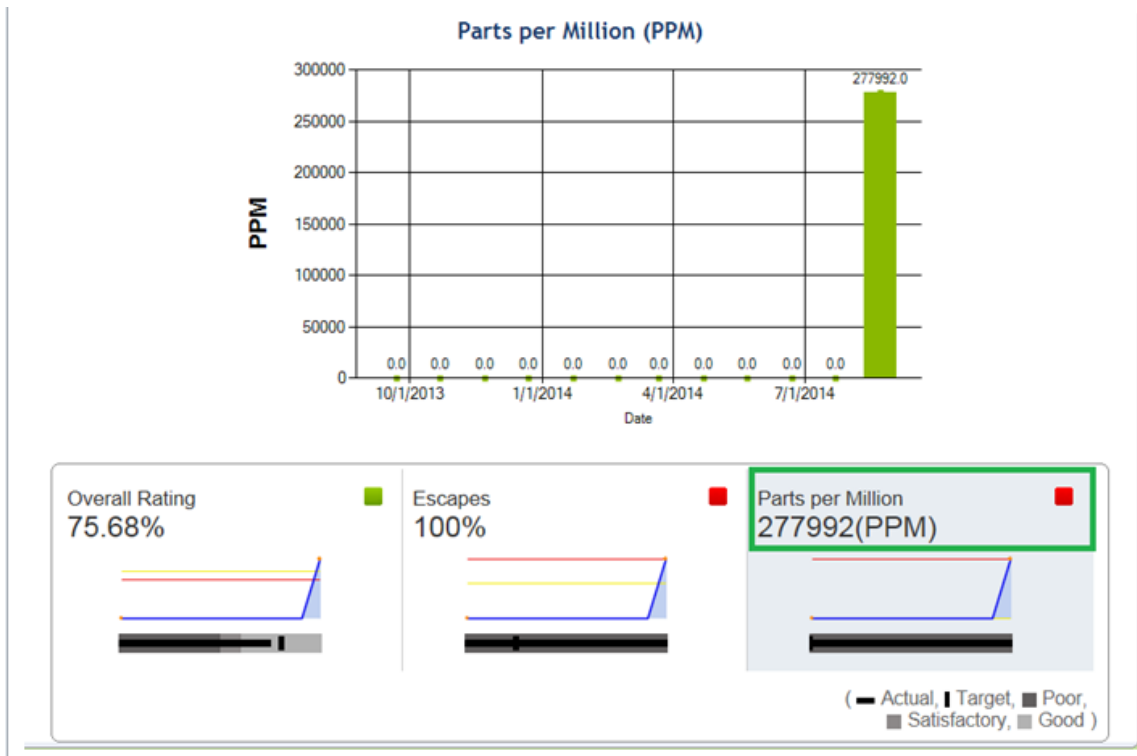
**Demand Planning**

**Bulk Tools**

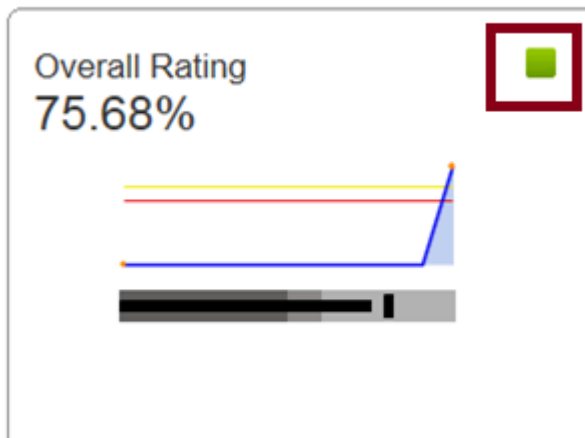
### Supplier Score Card

Once the Metrics are all set then the Suppliers Scorecard can be viewed from

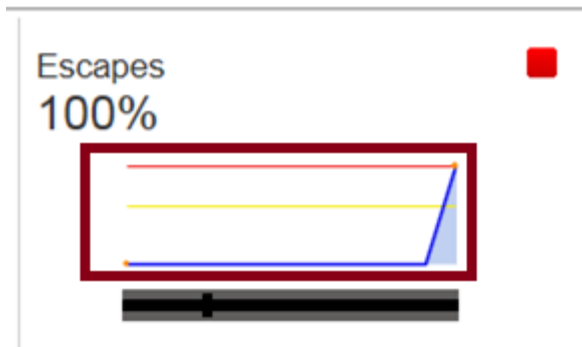
Admin > Supplier > More Options > Score Card



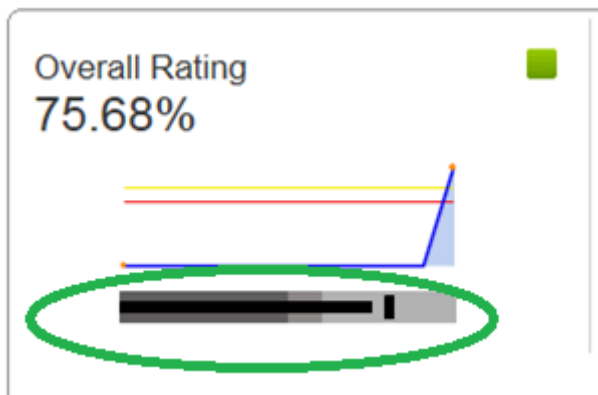
- PPM - This is a rating which is set in Numbers instead of Percentage.
- For example if Supplier supplies 1000 Quantity and of this 10 are rejected. Then the PPM value is derived like this:  $(\text{Quantity Rejected} / \text{Quantity Received}) * 1000000 \text{ (Million)} = 10000$  will be our PPM metric value.
- Ideally we will have Green set when the Supplier supplies the Items with least number of Rejections and as the Quantity rejected increases the scale moves from Green to Red.
- The Quantity of Items Rejected is uploaded into the system using the NCR Data Load Tool.
- The Supplier Rollup background service has to be run to populate the data for showing the scorecard charts.
- Red / Green / Orange indicates the rating for that particular description.



- Spark Line indicates the trend.



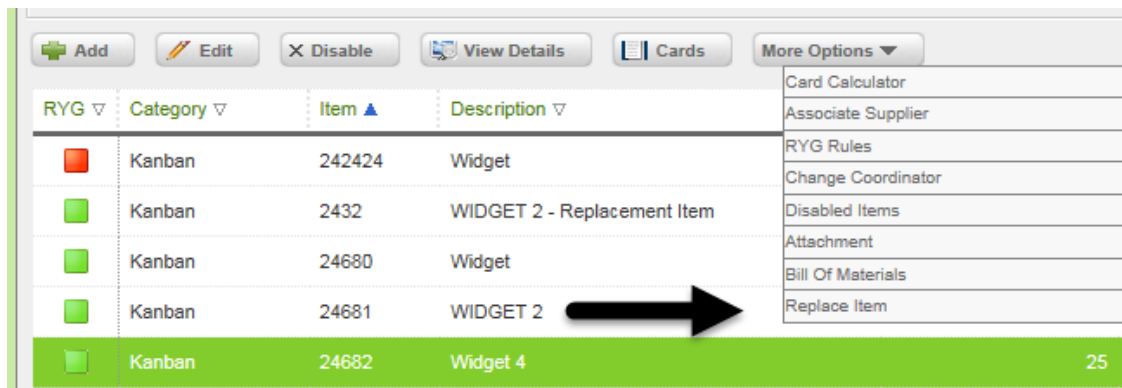
- Bullet Graph shows the actual values for that description.



## 1.12 Replace Item

Replace Item is used when you need to discontinue a part and replace it with a new part number at a specific point in the future.

1. Once logged in, go to Admin → Item → Highlight/select the item → More Options → Replace Item.



2. Enter the information for the replacement item.
3. On the Effective Date take Lead and Transit Times into consideration and subtract those days.

**Replace Item 24682** Last modified on [09/12/2014] by [Lori McNeely]

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**Existing Item Information**

Item No:	24682	Description:	Widget 4
----------	-------	--------------	----------

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**Replacement Item Information**

* Item No:	<input type="text" value="24682"/>	* Description:	<input type="text" value="Widget 4"/>
Revision No:	<input type="text" value="5"/>	Location Code:	<input type="text" value="STK"/>
Effective From Date:	<input type="text"/>		

\* Required field

4. The Item Status has 3 categories
  - Active - Normal status.
  - Not Effective - Replacement item not yet active because the original item hasn't hit the expiry date.
  - Expired - Item has been replaced with the new item.

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

Product Line:  Show:  RYG:   
 Supplier:  Item no. starts with:  Category:   
 Filter By  Select Operator  Enter Value  Go   
 Find Item

RYG	Category	Item	Description	Qty On Card	Default Supplier	Product Line	Commodity Code	No. Of Cards	Status
<span style="color: red;">■</span>	Kanban	242424	Widget	100	A&G Machining	Evolutions	Unknown	2	Active
<span style="color: green;">■</span>	Kanban	2432	WIDGET 2 - Replacement Item	50	A&G Machining	Evolutions	Unknown	0	Not Effective
<span style="color: green;">■</span>	Kanban	24680	Widget	100	A&G Machining	Evolutions	Unknown	14	Expired
<span style="color: green;">■</span>	Kanban	24681	WIDGET 2	50	A&G Machining	Evolutions	Unknown	48	Active
<span style="color: green;">■</span>	Kanban	24682	Widget 4	25	A&G Machining	Unknown	Unknown	33	Active

5. Note that the Open Orders are not automatically converted on the expiration date. As the expired cards get released they will be destroyed and new cards created under the new item number and released to the supplier.

**Release Cards Results**

Following card(s) were not released

Card ID	Item	Card Qty	Description
KCD4P29CNAKS	Dog Collar Large	10	KanbanCard: ExpiryDt for this item is reached, so, the Release for new revision is done with Card ID: KCD4P3ACNAZV
KCD4P2ACNALD	Dog Collar Large	10	KanbanCard: ExpiryDt for this item is reached, so, the Release for new revision is done with Card ID: KCD4P3BCNA2P
KCD4P2BCNAF7	Dog Collar Large	10	KanbanCard: ExpiryDt for this item is reached, so, the Release for new revision is done with Card ID: KCD4P3CCNAVJ

6. If there are 2 suppliers associated with an item, both Suppliers get created for the Replacement Item with the previously assigned percentages and values for both.

**Mapped Suppliers for Item 41410-030M5-B1-LJM** Filters Views How do I?

Filter By  Select Operator  Enter Value  Go   
 Find Supplier Item No.

Supplier Name	Supplier Item No.	Supplier Item Desc	Carrier	Lead Time (in days)	Transit Time (in days)	Card Allocation %	Wait for PO?	Wait at Runline?	Wait at Ship Hub?
Lio Chem	41410-030M5-B1-LJM	Masterbatch AU891-136B-9120-LJM	Unknown	2	0.5	50			
A&G Machining	41410-030M5-B1-LJM	Masterbatch AU891-136B-9120-LJM	Unknown	1	1	50			

7. For the basic reports, the history does not transfer to the new item.

### For things like the Card History:

The cards cycled under an item for example, **Dog Collar Large** still show as they normally would, the history is not moved to the new item.

For the replaced item, **Dog Collar Large-2**, only history for the new cards that get released/created for this item will show.





### For the Auto Resize Wizard:

Auto Resize is only using the history for the New Replacement Item – the Cycles for the Expired Item are not taken into account.

8. When you do a Search for the old item using the search functionality (on the lower left side of the application once you login) for for example, “**Dog Collar Large**” both, “**Dog Collar Large**” & “**Dog Collar Large-2**” items show up.

Note: **Dog Collar Large** is expired item and **Dog Collar Large-2** is the Replacement Item.

Item (2 results found)									
RYG	Business Name	Item	Description	Category	Default Supplier	Qty On Card	Cards On Hand	Cards On Order	No. Of Cards
	TBJ	Dog Collar Large	Dog collar for large dogs	Kanban	A&G Machining	10	21	2	23
	TBJ	Dog Collar Large-2	Dog collar for large dogs	Kanban	A&G Machining	10	0	17	17

1 to 2 of 2

9. Currently the replacement Item data cannot be sent from the ERP system via integration process to Ultriva.
10. You can do the Spike Orders for the Expired Part.
11. Once the Part is expired, you cannot edit the replacement information and change the Effective Date.

If the Original Part is still active, you can edit the Effective Date. For example, if today is October 22th and the Expiration Date is set as October 31st. You can still edit the replacement information and change the Expiration Date.

12. After replacing the item, you do not have the ability to identify the Expired Item which was replaced by the new item (and vice versa)?

## 2 Additional Enhancements

1. Re-sequence Production Orders Screen
  - a. Changes were made to make the page load faster.
  - b. Paging for orders shown in the day bucket. Initially the few orders based on user paging preference are loaded to the screen. Then the additional orders are loaded automatically when the user scrolls down.

**Production Sequence Screen Settings for WHSE121D** [How do I?](#)

[Reset current configuration](#)

Schedule Custom Field List Sort Info **Screen Info** External Device Data Info

**Supervisor Settings**

Name	Value
Refresh Page:	<input type="checkbox"/> OFF
Refresh Interval (in minutes):	<input type="range"/> 10
Rolling N days to show from today's date:	<input type="range"/> 6
Show Orders from:	Today to end of week
Number of orders to show per day:	<input type="range"/> 500

**Operator Settings**

- c. Item custom fields added to the filter list.
2. Production Sequence Screen
  - a. Changes were made to make the page load faster.
  - b. Filter added to the page.
  - c. Item custom fields added to the filter list.
3. Application search bar at the bottom has the following enhancements
  - a. Search by item description.

Material Status Search [Favori](#) [How do I?](#)

**Search results for Ingold Plug X**

Item (5 results found)

RYG	Business Name	Item	Description	Category	Default Supplier	Qty On Card	Cards On Hand	Cards On Order	No. Of Cards
	B3A-3810	20015009	Ingold Plug X	Kanban	COP2 Supermarket	8	1	1	2
	B3A-3903	20015009	Ingold Plug X	Kanban	COP2 Supermarket	6	2	0	2
	B3B-3B110	20015009	Ingold Plug X	Kanban	COP2 Supermarket	4	2	0	2
	B3B-3B120	20015009	Ingold Plug X	Kanban	COP2 Supermarket	2	2	0	2
	COP2 Supermarket	20015009	Ingold Plug X	Kanban	COP2 Washer	6	1	0	1

1 to 5 of 5

Ingold Plug X

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- b. Plant name in card list.
  - c. Print and Export added.

Material Status Search

Search results for Ingold Plug X

Item (5 results found)

RYG	Business Name	Item	Description	Category	Default Supplier	Qty On Card	Cards On Hand	Cards On Order	No. Of Cards
Yellow	B3A-3810	20015009	Ingold Plug X	Kanban	COP2 Supermarket	8	1	1	2
Green	B3A-3903	20015009	Ingold Plug X	Kanban	COP2 Supermarket	6	2	0	2
Green	B3B-38110	20015009	Ingold Plug X	Kanban	COP2 Supermarket	4	2	0	2
Green	B3B-38120	20015009	Ingold Plug X	Kanban	COP2 Supermarket	2	2	0	2
Red	COP2 Supermarket	20015009	Ingold Plug X	Kanban	COP2 Washer	6	1	0	1

1 to 5 of 5

Ingold Plug X

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4. Item description added to cycle time report.
5. Buyer queue supplier filter changed from dropdown to autocomplete to increase page performance.
6. For all buyer actions filter control, the supplier dropdown list is action specific. Only suppliers with orders for the corresponding action are loaded. In the previous release all the suppliers were loaded and it was decreasing page performance.
7. Supplier Stock out Report added for supplying work center.
8. **PicknShip Feature:** The PicknShip feature now supports short pick.

- a. Entered Pick Qty < Allocated Qty to Pick.

Ultriva Lean Suite (Dev Site)

~~Pick and Ship Scan - Step(4)

~Pick List Id: PKL-25MGJ8-222289-LFTU2

~Ship Card Id: KCD28XPLFT6G-011-3

~Qty To Pick: 6

~On Hand Card Id: KCD28U4LFT5D-002-3

~Pick Qty: 2

~<< ~Submit ~Back


~On hand card(s) to pick

KCD28U4LFT5D-002-3

~Qty:6

~Location:1.05.09.A

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**Ultriva Lean Suite (Dev Site)**

### ~~Pick and Ship Scan - Step(5)

~Pick List Id: PKL-25MGJ8-222289-LFTU2  
~Ship Card Id: KCD28XPLFT6G-011-3  
~Qty To Pick: 6  
~On Hand Card Id: KCD28U4LFT5D-002-3


~Your pick qty 2 is less than the system suggested qty 6. Is this last unit in the pick card?

☐ ~Yes
☐ ~No

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The user must choose **Yes** or **No**. Yes to Release the card or No if more units are on the card to be picked.

After Submit, if Qty to Pick > Picked Qty user has to confirm **Short Pick**.


**Ultriva Lean Suite (Dev Site)**

### ~~Pick and Ship Scan - Step(4)

~Pick List Id: PKL-25MGJ8-222289-LFTU2  
~Ship Card Id: KCD28XPLFT6G-011-3  
~Qty To Pick: 4.0000  
~Picked Qty: 2  
~On Hand Card Id:   
~Pick Qty:

☒ ~Confirm Short Pick

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Ultriva Lean Suite (Dev Site)

### ~~Pick and Ship Scan - Step(3)

~Pick List Id: PKL-25MGJ8-222289-LFTU2

~Ship Card Id:

~<< ~Submit ~Back

~Success:  
KCD28XPLFT6G-011-3  
Shipped Successfully

~Pick Location(s)  
I.05.09.A

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- b. Entered Pick Qty = Allocated Qty on Card or Pick Qty is left blank; Pick Qty is optional, if it is left blank then it will default to the Pick Qty shown above.

Ultriva Lean Suite (Dev Site)

### ~~Pick and Ship Scan - Step(4)

~Pick List Id: PKL-25MGJ8-222289-LFTU2

~Ship Card Id: KCD28Y9LFTFR-010-0

~Qty To Pick: 6

~On Hand Card Id: KCD26ZYLFTAN-007-4

~Pick Qty:

~<< ~Submit ~Back

~On hand card(s) to pick  
KCD26ZYLFTAN-007-4  
~Qty:6  
~Location:I.05.09.A

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Ultriva Lean Suite (Dev Site)

### ~~Pick and Ship Scan - Step(3)

~Pick List Id: PKL-25MGJ8-222289-LFTU2

~Ship Card Id:

~<< ~Submit ~Back

~Success:  
KCD28Y9LFTFR-010-0  
Shipped Successfully

~Pick Location(s)  
I.05.09.A

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c. Entered Pick Qty > Allocated Qty to Pick.

Ultriva Lean Suite (Dev Site)

### ~~Pick and Ship Scan - Step(4)

~Pick List Id: PKL-25MGJ8-222289-LFTU2

~Ship Card Id: KCD28Y3LFTGM-008-2

~Qty To Pick: 6

~On Hand Card Id: CD28TWLFTBQ-002-1

~Pick Qty: 10

~<< ~Submit ~Back

~On hand card(s) to pick  
KCD28TWLFTBQ-002-1  
~Qty: 6  
~Location: I.05.09.A

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An error is displayed if the Entered Pick Qty is greater than the Qty that was supposed to be Picked.

Ultriva Lean Suite (Dev Site)

### ~~Pick and Ship Scan - Step(4)

~Pick List Id: PKL-25MGJ8-222289-LFTU2

~Ship Card Id: KCD28Y3LFTGM-008-2

~Qty To Pick: 6

~On Hand Card Id: KCD28TWLFTBQ-002-

~Pick Qty:

~<< ~Submit ~Back

~Error:  
~Pick quantity 10 is greater than on hand card quantity 6

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9. On Production Sequence screen, if multiple job selection option is enabled, we show the Item Total for the selected jobs.

Total Selected Items: 4		
Item	Cards	Qty
C668475P01M	2	20
D671395P01m	1	15
D671396P02m	1	200
D671399P02m	1	9
Recalculate Total		

10. Print PO Button on the Accept Cards screen can be shown/hidden based on configuration.
11. We now support rule condition based on Source Application type like UI, BG Service or Integration.
12. Support to select multiple Ship To Location when a card/order is released.
13. Reschedule reason appended to notes is now supported.
14. ReleaseForecastOrder now can use the published PlannedPO details if the UsePlannedPO config on the business unit is set to true.

## 7.7 P4

15. Added BU setting “Override Pick Card Quantity”: if set to Yes Pick N Ship scan will allow to override Pick Qty:

~My Account

~Favorites

~Workcenter Configuration for: FPN RAW

~Last modified on [01/09/2015] by [Ultriva Usser]

~How do I?

General Card Custom Integration Pick List Print Receive Release Scan Ship

~Configuration Settings

~Name ~Value

Inspection reject behavior: Classic

Inherit rules from plant: ON

Override Pick Card Quantity: Yes

\* ~Required field

~Save | ~X | Cancel

16. Buyer Scan Approve/Reject for Master Label: user can approve/reject some individual cards on master label and then do an action of approve or reject to the rest of the cards on the master label with just one scan.

**~Approve Card(s) Scan** [~How do I?](#)

**~Scan Input**

~To scan click in the Card Id box and start scanning

~Card Id:

~Approve Qty:

**~Scan Results**

~Total Scanned: 1 ~Success: 1 ~Failed: 0 ☐ ~Clear Status

~Success : MLB2237LFT2Z-8 - ~Total Cards:1 Success:1 Failed:0 Already Processed:0

**Ultriva Lean Suite (Dev Site)**

**~ ~Approve Scan**

~Card Id:  X

~All cards for this Master Label will be approved

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**Ultriva Lean Suite (Dev Site)**

**~ ~Approve Scan**

~Card Id:

~Success:  
MLB223JLFT4Y-1  
~ ~Total Cards:1 Success:0  
Failed:0 Already Processed:1

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17. Buyer Approve/Reject for Master Label in UI/forms: user can approve/reject some individual cards on master label and then do an action of approve or reject to the rest of the cards on the master label.

**~Approve Items List** [~Filters](#) [~Views](#) [~How do I?](#)

~Supplier:  ~Cards:  ~Show:  ~Category:  ~RYG:  ~Approve:

Filter By:  Select Operator:  Enter Value:

Find Item:

RYG	Item	Description	Total Qty	Total Cards
0017-00006-0283	BRG: BAL 17MMX 40MMX 12MM DIN ST B	250	1	
AK66-00003-0001	CRANK-HUB/BRG/SHAFT ASSY: PURCH	36	6	

**~Master Label List from FPN RAW** [~How do I?](#)

~Supplier:  Filter By:  Select Operator:  Enter Value:

Find Label ID:

Label ID	Create Date	Created By	Status	Total Cards	Cards failed to ship	Last Action Date	Last Action By
MLB224LLFTWL	02/04/2015 06:36:00 AM	ultrivauser	Received	3	0	02/04/2015 06:39:39 AM	ultrivauser
MLB224JLFT4G	12/18/2014 12:00:49 PM	ultrivauser	Received	3	0	12/18/2014 12:59:42 PM	ultrivauser
MLB224ELFT2S	12/18/2014 11:30:05 AM	ultrivauser	Received	2	0	12/18/2014 11:43:30 AM	ultrivauser
MLB223GLFT65	11/27/2014 08:13:57 AM	ultrivauser	Received	1	0	11/27/2014 08:46:32 AM	ultrivauser



Card in status Received will be rejected on this action:

**Reject Master Label MLB224ELFT2S** [~How do I?](#)

Filter By  Select Operator  Enter Value

~Select Priority  
☐ ~Low ☒ ~Medium ☐ ~High

~Notes

Find Card ID

Card ID ▲	Supplier Item No. ▲	Card Qty ▼	Release Date ▼	Reqd Ship ▼	Plant Shipped ▼	Ship Qty ▼	PO # ▼	Ship Status ▼	Receive Status ▼	Status Message ▼
KCD28XRLFT27	AK66-00003-0001	6	10/22/2014	10/23/2014	12/17/2014	6		DONE	DONE	Successfully Received
KCD28Y7LFTN6	AK66-00003-0001	6	10/22/2014	10/23/2014	12/17/2014	6		DONE	DONE	Successfully Approved

~Sorted by: Supplier Item No., Card ID 1 to 2 of 2

18. Supplier Master label list: added view for master Labels in status Approved or Rejected

**Master Label List For LC002** [~How do I?](#)

~Plant  ~Label Status  Filter By  Select Operator  Enter Value

Find Label ID

Label ID ▼	Create Date ▼	Created By ▼	Status ▼	Total Cards ▼	Cards failed to ship ▼	Last Action Date ▼	Last Action By ▼
MLB223JLFT4Y	11/27/2014 08:36:04 AM	ultrivauser	APPROVED	1	0	02/04/2015 07:03:11 AM	ultrivauser
MLB2237LFT2Z	11/01/2014 10:13:35 AM	ultrivauser	APPROVED	1	0	02/04/2015 07:00:12 AM	ultrivauser
MLB224ELFT2S	12/18/2014 11:30:05 AM	ultrivauser	APPROVED	2	0	02/04/2015 06:57:24 AM	ultrivauser
MLB2238LFT4B	11/01/2014 10:13:52 AM	ultrivauser	REJECTED	1	0	12/19/2014 07:25:43 AM	ultrivauser

19. NCR DataLoad Changes: In the NCR Data Load when the QtyReceived is not passed it still creates the NCRs with QtyReceived as 0. Changes were made to enable this feature.
20. Option to enter purchase unit price in Virtual Kanban approval screen (Exposed via data grid customization).
21. Supplier Material Status - Increased query and processing performance to speed up the report.
22. Last 30 days average daily demand added to Virtual kanban release approval and forecast details screen. This data is to be exposed via data grid customization.
23. Item edit screen shows, effectivity information.
24. Virtual Kanban Approval Screen lead time and required ship date information added (Exposed via data grid customization).
25. Minimum safety stock quantity (Last 30 day's average daily demand multiplied by Safety time days) added to Virtual Kanban Approval Screen, Forecast screens. This data is to be exposed via data grid customization.
26. Forecast order detail, item total on hand and on order quantity information added (Exposed via data grid customization).
27. Added serial label printing for serial controlled items.
28. Virtual Kanban Inventory batch job - Adjust Inventory support added for Virtual and Kanban items.

- a. If version 2 is enabled then VKB V2 uses Adjust Inventory approach to keep the inventory similar to MRP inventory. However it uses additional logic to identify when to release a card has to be released and create ghost card for the remaining inventory:
  - i. If it is EmptyBox then wait till the card's current on-hand inventory comes to 0.
  - ii. If it is OpenBox then issue the material from the card and release it. Then create a Ghost Card (basically a child card with 0 cycle) for the remaining units.
  - iii. If it is % based then keep issuing till we hit the level. Once we hit the level then do similar logic as point 2.

## 7.7 P5

29. Fixed 14 high priority white hat security issues.

## 7.7 P6

30. The SQL Query for Search is optimized.
31. The drop down list now shows all associated plant users on the plant coordinator field during the item setup on the Customer Kanban Application.
32. During Item Sync, for new forecast items, the beginonhandqty/cardqty will be the number of On Hand cards created if the **Release Planned Orders by Lotsize for Forecast Items** is set to **ON** on the busunit configuration. If **Release Planned Orders by Lotsize for Forecast Items** is set to **OFF** then only 1 card is created.

**Plant Configuration for:** Last modified on [10-03-2015] by [Test All] [How do I?](#)

General Card Custom Integration Pick List Print QMS Receive Release RFQ Scan Ship

**Configuration Settings**

Name	Value
Approvals for Virtual Kanban Release: ?	<input type="button" value="OFF"/>
Aggregate on hand inventory from internal Item number to purchase Item number for Virtual Kanban Release: ?	<input checked="" type="button" value="ON"/>
Consumption Scan for Forecast Items: ?	<input checked="" type="button" value="ON"/>
Release Planned Orders by Lotsize for Forecast Items: ?	<input checked="" type="button" value="ON"/>
Reset card location to item location on release: ?	<input type="button" value="OFF"/>
Allow spike order for forecast items: ?	<input checked="" type="button" value="ON"/>
Allow spike orders to wait at runtime:	<input checked="" type="button" value="ON"/>
Show unit price in spike order entry screen: ?	To All Items ▼

\* Required field

»  Cancel

## 7.7 P7

33. The Admin Section now allows setting up the Supplier Rating Criteria values used in the Supplier Metric Scorecard Reports under Admin → NCR Entities. Each of these Metric values is used in calculating the Suppliers performance.

**Supplier Rating Criteria (System Level)** Filters Views How do I?

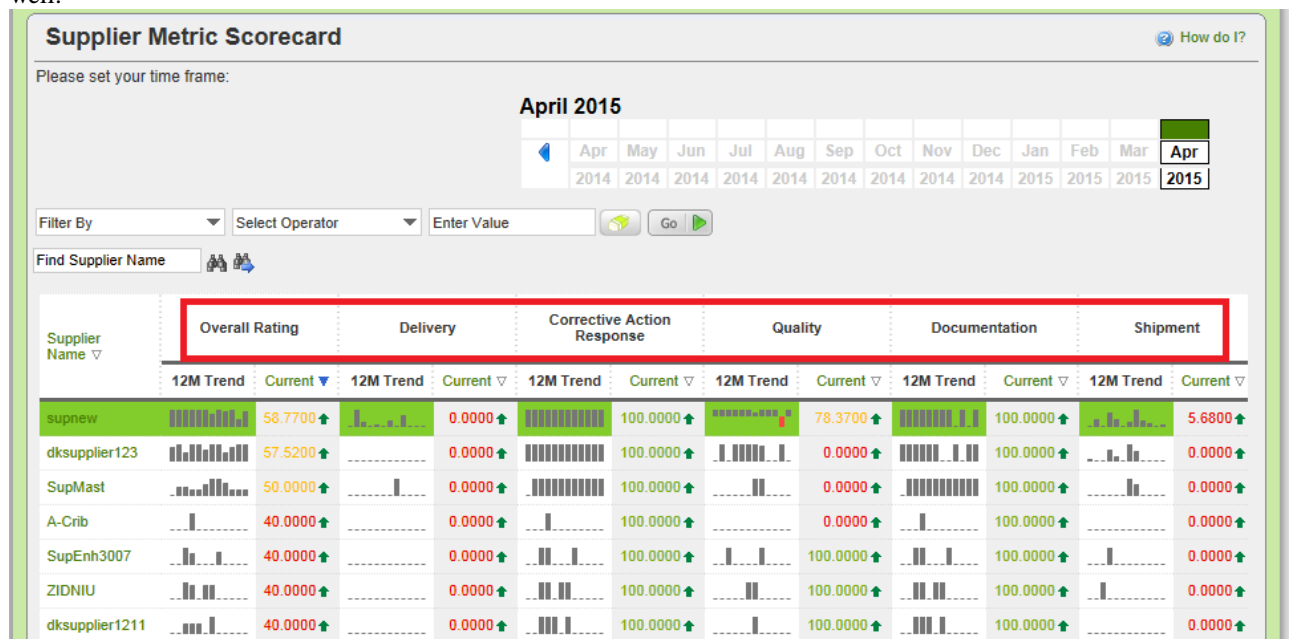
Filter By  Select Operator  Enter Value

Non Conformity Type  
Non Conformity SubType  
Audit Result  
Process NC Code  
System NC Code  
Corrective Action  
Disposition Code  
Disposition Routing  
Root Cause Code  
**Supplier Rating Criteria**  
Liability Code  
ASL Commodity Code

**Red to Green Ratings**

<input type="checkbox"/>	Description	Early Tolerance	Late Tolerance	Red		Yellow		Green		Weightage (in %)
				From	To	From	To	From	To	
<input checked="" type="checkbox"/>	Overall Rating	0	0	0	35	35.01	75	75.01	100.00	
<input checked="" type="checkbox"/>	Delivery	0	0	0	50	50.01	70	70.01	100.00	10
<input checked="" type="checkbox"/>	Corrective Action Response	0	0	0	70	70.01	80	80.01	100.00	10
<input checked="" type="checkbox"/>	Quality	0	0	0	80	80.01	90	90.01	100.00	10
<input checked="" type="checkbox"/>	Documentation	0	0	0	80	80.01	90	90.01	100.00	10
<input checked="" type="checkbox"/>	Shipment	0	0	0	50	50.01	70	70.01	100.00	10
<input checked="" type="checkbox"/>	Order Acknowledgement	0	0	0	70	70.01	80	80.01	100.00	20

34. Buyer & Supplier Reports > Supplier Metric Score Card , shows all the suppliers' performance for the plant based on the Metric set up in the admin. Additionally each performance will be shown as graph as well.



35. Batch Job retry added for all batch jobs:  
Integration -> Batch Job report filter -> select the job name and date range.

Batch ID	File Name	Uploaded On	Uploaded By	Status	Pending	Completed	Duplicates	Failed	Expired
BAT5572-150430-TRATC		04/30/2015 03:36:51 PM	dkplantuser	DONE	0	0	0	1	0
BAT5537-150421-TRA7T	PlannedOrd_21042015.txt	04/21/2015 12:27:07 PM	intg_BSU23BWTRAPH	DONE	0	1	0	2	0

Click on Failed job:

Line #	Plant Code	Item	Item	PO #	PO Line #	Order Qty	Order Date	Req'd Ship	Req'd Receive	StatusMsg	Status Change Date
2	TCEK-Ram	dk83004	dk83004	0	0	200	04/29/2015	05/02/2015	05/06/2015	Item is not a forecast item	04/30/2015 03:36:52 PM

Select the job and click Retry, click yes on confirmation screen:

Line #	Plant Code	Item	Item	PO #	PO Line #	Order Qty	Order Date	Req'd Ship	Req'd Receive	StatusMsg	Status Change Date
2	TCEK-Ram	dk83004	dk83004	0	0	200	04/29/2015	05/02/2015	05/06/2015	Item is not a forecast item	04/30/2015 03:36:52 PM

Line #	Code	Item	Result
2	TCEK-Ram	dk83004	Status changed to pending

Job will be re-run by the background service.

36. Inventory file can be processed now via File Upload process and now supports overlay to process multiple files.
37. New logic added to remove duplicate records in the item sync file during the file import process.
38. The rules/alerts body and subject now support Unicode characters like Chinese.
39. New filters added to the Supplier Performance report as shown below.

Home > Reports > Report

Suppliers Performance Report

\* Date Range: 01/01/2015-01/15/2015

Show Performance for: ☒ Shipment Accuracy ☐ Receipt Accuracy ☒ Using Original Required Ship Date

Early Tolerance: ☒ Ignore ☐ Tolerance 0 days

Late Tolerance: 0 days

Category: All

Item Coordinator:

Show Report | » Schedule Report | »

\* Required Field

40. An audit entry is created for the forecast planned order release with all the details.
41. The planned order job now creates and supports the drop ship address.
42. Fixed the sort condition for the Card search, Item search and Supplier search results.
43. PO Receipt Cancel job supports the RTVCard (Return to vendor) setting from the file data.
44. For a consigned item the on hand card, be set as consigned inventory or plant owned.
45. Added a New Custom Report for Cancel Receipt.
46. For an import batch job, the setting overlay is enabled, it expires all the files except the latest when multiple files are found during processing.
47. For the planned orders import job, support added to **PUT\_ONHOLD** in case of any errors but wait for master data to be resynched.
48. Master label can be approved via scan action.
49. The Print PO PDF module now supports Chinese characters.

## 7.7 P8

50. **Put on Hold** feature for batch jobs.  
This feature allows batch job records to be set in pending state for certain amount of time under certain conditions such as waiting on another dependent batch process to be completed.

This feature is currently supported by following batch jobs:

1. Item Sync
2. PO Sync
3. PO Change (PO based operation)
4. PO Recall (PO based operation)
5. PO Receipts
6. Planned Orders

## Enabling 'Put On Hold' feature

1. Login to SysAdmin module and navigate to Integration->ServiceTask->Select Plant

Service Task List

Plant: TCEK-Ram X Go

Buttons: Add, Edit, Enable, Disable, Bulk Update, More Options

More Options menu: Copy, JobFileParams Configuration, Field Mapping

	TaskName	Direction	File Name	Task Status	Last Run Time
<input type="checkbox"/>	ErpCustomerSync	DataIn	CustomerSync_*	DONE	07/31/2015
<input type="checkbox"/>	ErpCustomerItemSync	DataIn	CustomerItemSync_*	DONE	07/31/2015
<input type="checkbox"/>	CustomerPOChange	DataIn	CustomerPOChange_*	DONE	07/31/2015
<input type="checkbox"/>	ErpCustReceipts	DataIn	CustReceipts_*	DONE	07/31/2015
<input type="checkbox"/>	ErpCustShipments	DataIn	CustShipments_*	DONE	07/31/2015
<input type="checkbox"/>	ErpInspect	DataIn	Inspect_*	DONE	07/31/2015
<input type="checkbox"/>	ErpItemSync	DataIn	Item_*	DONE	07/31/2015
<input type="checkbox"/>	ErpNCRData	DataIn	NCRData_*	DONE	07/31/2015
<input type="checkbox"/>	ErpPickAndShip	DataIn	PickAndShip_*	DONE	07/31/2015
<input checked="" type="checkbox"/>	ErpPoChange	DataIn	ErpPoChange_*	DONE	07/31/2015

11 to 20 of 72 Prev Page 2 Next

Select batch job from the list and click on JobFileParams configuration as shown above.

2. Add the following key to enable 'put on hold' feature for selected batch job.

Key : PUTONHOLD

Value : 1.0

Note: Value is specified in hours.

Manage Job File Params for JOBERPPOCHANGE

Buttons: Add, Edit, Delete, Show JobFileParams, Replace/Import

Params Info

\* Key: PUTONHOLD

\* Value: 1.0

\* Required field

Buttons: Save, Cancel

3. Click on save.

### **Batch job behavior when 'Put on hold' feature is enabled**

- Item Sync
  - Records are held in pending state for the following conditions:
  - New Item
    - Supplier code provided in the file is currently not present in the system.
    - Plant user code is currently not present in the system.
  - Update Item
    - Supplier code provided in the file is currently not present in the system or is not associated to the plant.(Note: Provide supplier allocation percentage for new supplier allocation for update item)
- PO Sync
  - Supplier code is currently not present in the system or is not associated to the plant.
  - Item number is currently not present in the system.
- PO Recall

Note: Pending state is only supported for PO based PO recall transactions. In this case Release ID column is left empty in batch file.

  - Purchase order details provided in file are currently not associated with any cards for given item number
- PO Change

Note: Pending state is only supported for PO based PO change transactions. In this case Release ID column is left empty in batch file.

  - Purchase order details provided in file are currently not associated with any cards for given item number
- PO Receipt
  - Purchase order details provided in file are currently not associated with any cards for given item number
- Planned Orders
  - Item specified in the file is currently not present in the system.
  - Supplier code is currently not present in the system or is not associated to the item.

51. Export to Excel now creates a smaller file and is faster.

52. PO Sync now supports Ship To Address.

53. Item description and In Transit quantity added to buyer and Supplier Forecast screen.

54. Release Forecast/Planned Order module will audit to the Audit Table. The audit details can be viewed from Audit Report and Card Search.

55. Release Forecast/Planned Order module will disable the Release button once user clicks it so user cant accidentally click it twice.

56. Planned Order import process, we will create address record if any one of the address fields is non-empty.

57. Added default sort for the Card, Item and Supplier Search results.

58. Item Edit Screen: Revision No as read only field in the UOM Tab.

59. Support for drop-off location and delivery location as warehouse added to legacy Default Print PO template.

## 7.7 P9

### 60. Named Date filters for Custom reports

On Run Custom Report in filter user can select certain date/date interval or named date which will transform into the dates interval on execution. To the filter operator added “Between” option. Please note that on report creation/edit user can select only calendar date from the filter, but has option to change it to named date before running the report.

The 'Show Custom Report' dialog box displays the following information:

- Name:** cross tab history
- Type:** Kanban: Cross Tab History (Tabular)
- Description:** cross tab history
- \* Date Range:**
  - BeginCycleTime:** Past 3 Months
  - EndCycleTime:** 09/01/2015-09/30/2015
  - Release Date:** (empty field)
  - Max Date Range:** 92 days
- Plant:** ☐ This Plant ☐ Work Centers ☒ Both
- Run as:** Buyer (dropdown menu)
- \* Filter:**

Field Name	Operator	Filter Value
Release Date	Equal To (dropdown)	Month To Date

Buttons: [Reset Filter](#) [Edit Report](#) [How do I?](#)

On Schedule Custom Report page user cannot select calendar date, named dates only:

The 'Create Schedule for Custom Report cross tab history' dialog box displays the following information:

- Name:** cross tab history
- Type:** Kanban: Cross Tab History (Tabular)
- Description:** cross tab history
- \* Date Range:**
  - BeginCycleTime:** Month To Date
  - EndCycleTime:** (empty field)
  - Release Date:** (empty field)
  - Max Date Range:** 92 days
- Plant:** ☐ This Plant ☐ Work Centers ☒ Both
- Run as:** (empty dropdown menu)
- \* Filter:**

Field Name	Operator	Filter Value
------------	----------	--------------

A dropdown menu is open over the 'Release Date' field, showing the following options: Today, Current Week, Month To Date, Previous Week, Previous Month, Past 7 Days, Past 3 Months, Yesterday.

Buttons: [Edit Report](#) [How do I?](#)



**\* Filter:**

Field Name	Operator	Filter Value
Release Date	Greater Than	08/19/2015

**2. Set the Schedule Frequency**

\* Frequency: ☒ Daily ☒ Every weekday  
☐ Weekly ☐ Every day  
☐ Monthly

\* Start Date: 09/25/2015 \* Hour: 00:00 Exact start time will depend on frequency

☒ No End Date ☐ Set End Date

\* Report Format: Excel attachment ?

\* Deliver to: ultrivauser Additional users:

Save | » X | Cancel

Today

Current Week

Month To Date

Year To Date

Previous Week

Previous Month

Previous Year

Past 7 Days

Past 3 Months

Past One Year

Yesterday

## 61. Invoice payments feature

Added batch job JobErpInvoicePayments to load invoice and payments data to Ultriva. Batch job file format and details are specified on the Ultriva help site.

Invoices are shown for a supplier business unit after this feature is enabled. A panel listing count of invoices in various states is listed on supplier home page.



Clicking on panel cards shows individual invoices.

~Report ~Print ~Export ~Favorites

### ~Accounts Receivable for TEMPEL STEEL COMPANY

~Plant:  ~Approval Status: Pending Approval ~Payment Status: All ~Invoice Creation Date:

~Payment Due Date:

Filter By  Select Operator  Enter Value

Find Invoice No.

Invoice No.	Invoice Date	Business Name	Amount	Invoice Status	Payment Due Date	Payment Status	Payment Date	Paid Amount
203	10/05/2015	Fasco - Cassville	3,000	Pending	11/16/2015	Pending	09/24/2015	2,000
204	09/24/2015	Fasco - Cassville	3,000	Pending	11/05/2015	Scheduled	09/24/2015	2,000
206	08/06/2015	Fasco - Cassville	3,000	Pending	09/17/2015	Pending	09/24/2015	2,000
207	08/05/2014	Fasco - Cassville	3,000	Pending	09/16/2014	Pending	09/24/2015	2,000

~Sorted by: Invoice No 1 to 4 of 4

Each invoice can be drilled down to view details about payments.

~Report ~Print ~Export ~Favorites

### ~Invoice Details for 204

[~Back to Summary](#)

~Invoice No.:	204	~Approval Status:	Pending
~Invoice Date:	09/24/2015	~Approved Amount:	\$2,000.00
~Invoice Amount:	\$3,000.00	~Payment Status:	Scheduled
~Plant:	Fasco - Cassville	~Paid Amount:	\$2,000.00
~Plant Code:	FCS		

Payment Number	Payment Date	Payment Amount
8201	09/24/2015	2,000

~Report ~Print ~Export ~Favorites

### ~Payment Details

[~Back](#)

Filter By  Select Operator  Enter Value

~Invoice No. 204 ~Payment Number: 8201

Date	Bank Name	Check #	Description	Amount
09/25/2015	Aura Bank	0862625	Paid via ECS	2,000

~Sorted by: Date 1 to 1 of 1

62. The **Receipts Due** and **Shipment Due** reports now have an option to view the items with due or without due.

### 3 Bug Fixes

1. Operator Efficiency Report– Now additional operators reported in close production will be available for reporting.
2. Supplier Item – Change Coordinator: Fixed user cannot be removed from additional contacts.
3. Print PO bug fixes: layout, pictures, etc.
4. SBR recommendations/exceptions will be closed after user reschedules\recalls action.
5. Print Duplicate cards date filter bug fixed.
6. On the supplier material status screen, the cards in quarantine state were not shown in the inventory status tab; this bug is fixed.

#### 7.7 P4

7. Total Spend report chart: keep the same colors for the chart on the screen and in pop-up.
8. Forecast Historical Report charts – link fix for pop-up.
9. Batch job Kanban Release Orders, was creating cards for an item when no supplier is mapped to it.
10. CycleTime report - item description is empty for first record.
11. Recalled card does not make to new pick list - Update pick details record as removed when the shipped card is recalled.
12. System error fixed when user tries to replace expired item.
13. Fixed JobExpPORecall batch job exporting masked PO number since the recall action masks the PO number to add date & time.
14. Auto complete dropdown width adjusts to the data.
15. Material Status screen queries optimized so no more time out.
16. The Cached Business calendar refreshes automatically if some changes done by user.
17. Change the Order Number in Batch Table when a card is recalled to avoid any duplicate error – if the same order is re-uploaded. However this order number change is done only if the SplitByLotSize flag is not enabled.

## 7.7 P6

18. The expiry set on the downloaded kanban label during printing is increased to 5 minutes. The downloaded file sometimes was deleted within seconds and user would see an error and was not able to print the cards.



19. Logic added to clear the cache when planned orders are released.
20. The forecast gross requirements split order logic is changed such that any fractional units get allocated to the preferred supplier when the item has more than 1 supplier association.
21. For the Batch Job, ERPConsumption, the logic to calculate the total card quantity for a given PO is fixed when a child card is spawned.

## 7.7 P7

22. Create new holiday by clicking on the calendar, bug existed in FireFox only.
23. Fixed navigation for Customer user login history
24. Removed paging from SalesOrderFilter page
25. Print PO: added all dataset to the raw data export
26. Print PO: ship to address will be derived from the cards, by default ship to address is Plant address.
27. Kanban Loop Design pages: fixed add to Favorites and Raw data extract.
28. The logic to calculate total card quantity for a given PO is corrected.
29. Multiple po set error files are now imported as required for the job, SetPo.
30. In the PO Cancel Export job was publishing the masked PO number and is fixed now.

## 7.7 P8

31. Windows CE scan pages, will go back to the first step if card is in wrong state.
32. When the master label is rejected, the cards were going back to the in process status; this is fixed and now the cards will be held in putaway status if the item config is set for **Wait for Put Away**.