



Ultriva 7.6 and Higher Supplier Inventory Upload Reference Guide

Table of Contents

(Click to follow link)

<i>Get a Sample File and General Spreadsheet Set-up.....</i>	<i>2</i>
<i>Inventory Upload Instructions</i>	<i>7</i>
<i>Inventory Upload Filtering Instructions.....</i>	<i>11</i>
<i>Supplier Queue – View your On Hand Inventory</i>	<i>13</i>

Get a Sample File and General Spreadsheet Set-up



Important – The “User” must be a Supplier Administrator to perform these functions!

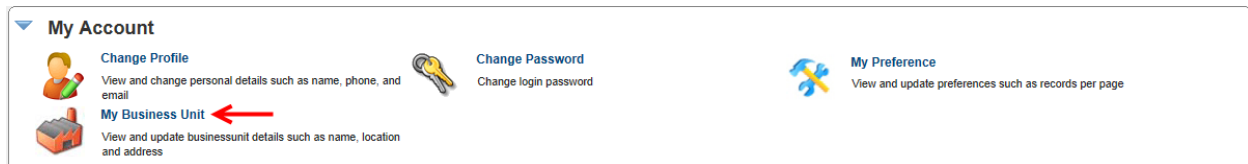


Quick Tip - You must have your Excel Spreadsheet Set-up and Saved as a Tab Delimited file prior to the upload. These instructions will guide you through getting the sample file and saving it in the proper format.

To navigate to the **Inventory Upload** screen, **click** on “**My Account**”



Click on “**My Business Unit**”



Click on the “**Inventory Tab**”

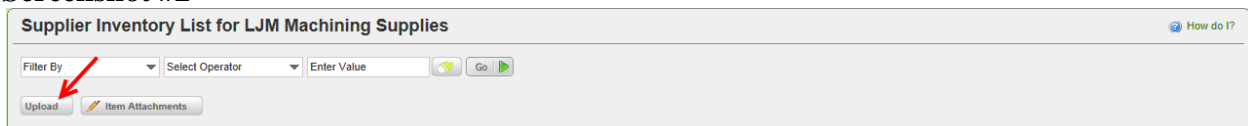


Click on the “**Upload Inventory**” button (Screenshot #1) if this is your **first upload**. **Click** on the “**Upload**” Button (Screenshot #2) if you have **uploaded data before**. (If you have uploaded data prior to this, you will not see screenshot #1).

Screenhot #1



Screenshot #2



Click on the “Click here to Download Sample file” link.

Load Supplier Inventory Data How do I?

Please upload the following files. The file should be TAB delimited. The first row should contain header columns and the column names should match with the sample file given below. Download the sample file for your reference by clicking the Sample File Download link.

Select Supplier Inventory data file: [Click here to Download Sample File](#)

* Required field

Click on “Open”

The sample spreadsheet opens. Leave the “Column Headings” and Delete the other information.

A	B	C	D
SupplierItemCode	SupplierItemDesc	OnHandQty	ListPricePerUOM
0017-00006-0274	0017-00006-0274	5	10.34
0017-00006-0276	0017-00006-0276	200	100
0017-00006-0283	0017-00006-0283	300	22.25
0017-00006-0285	0017-00006-0285	400	22.56



Important – You must use the Supplier Item Number that is in Ultriva and the column headings must match exactly as defined in the sample file that you downloaded.

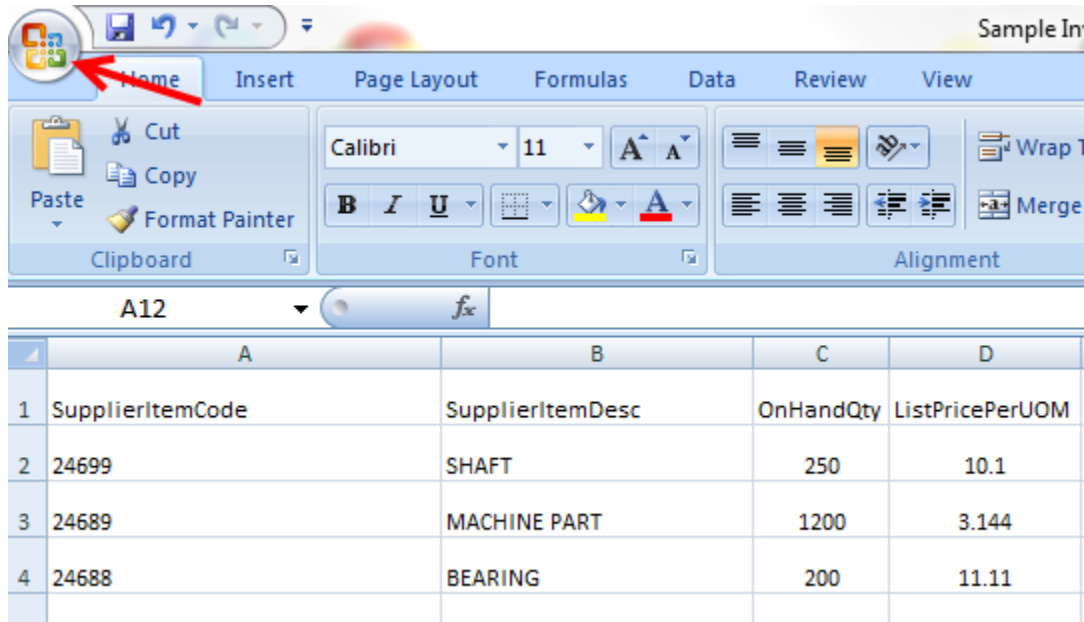
Enter the information you want to upload.



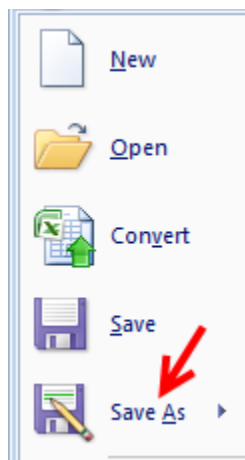
Quick Tip - The ListPricePerUOM can be entered as a Zero as that value will not be changed.

SupplierItemCode	SupplierItemDesc	OnHandQty	ListPricePerUOM
24699	SHAFT	250	10.1
24689	MACHINE PART	1200	3.144
24688	BEARING	200	11.11

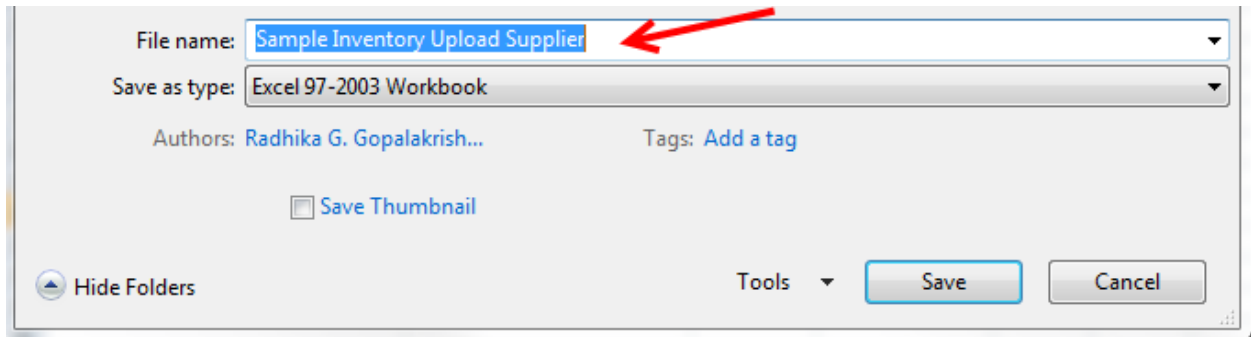
Click on the “Windows Office” button. (Or if you do not have that option, select “File” from the menu.)



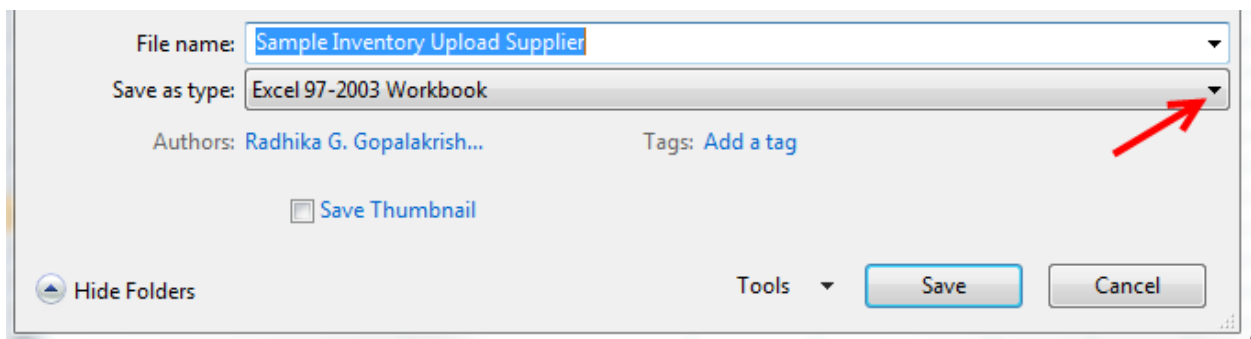
Click on “Save As”



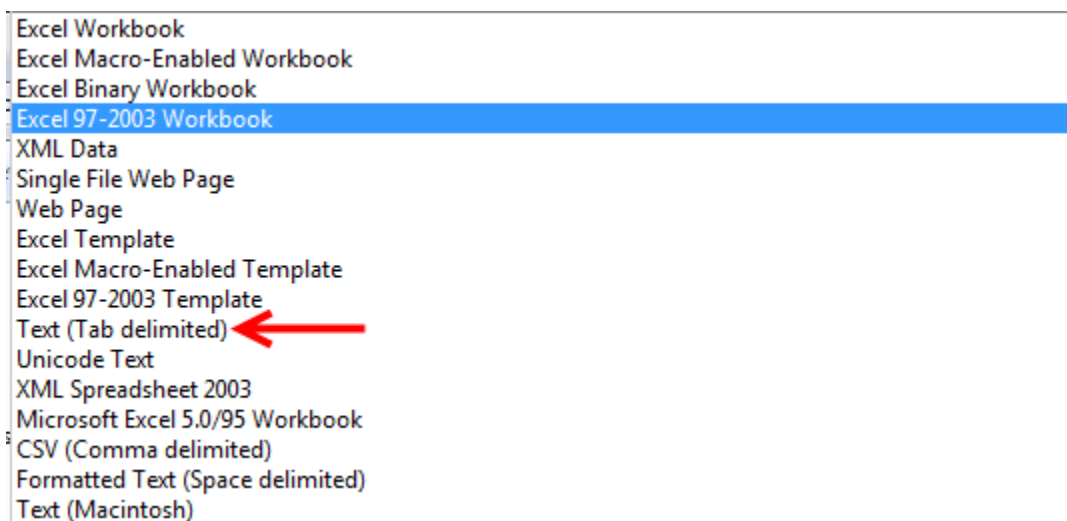
Enter the “File Name”



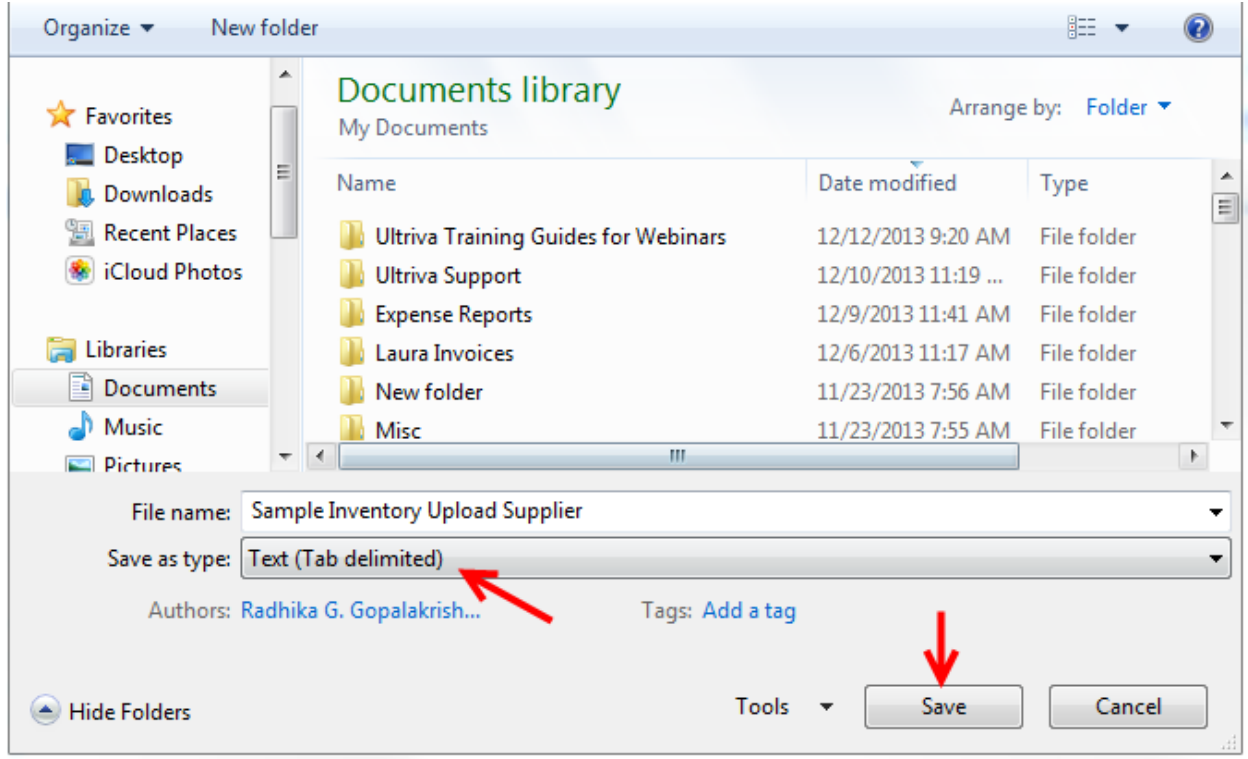
Click on the **drop down arrow** in the “Save as type:” field.



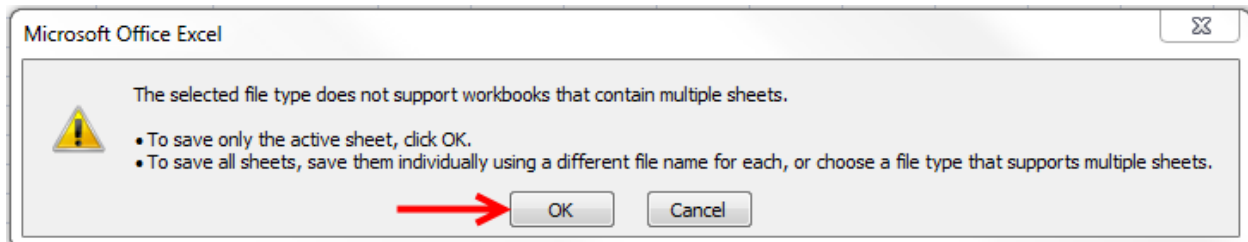
Click on “Text (Tab Delimited)”



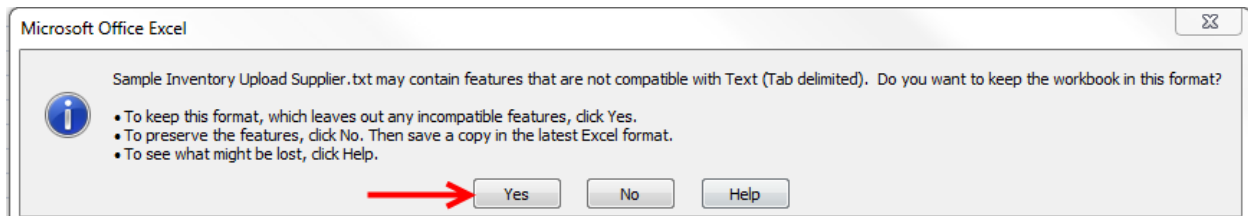
With the “Text (Tab Delimited)” selected, click on the “Save” button



Click on the “OK” button.



Click on the “Yes” button.



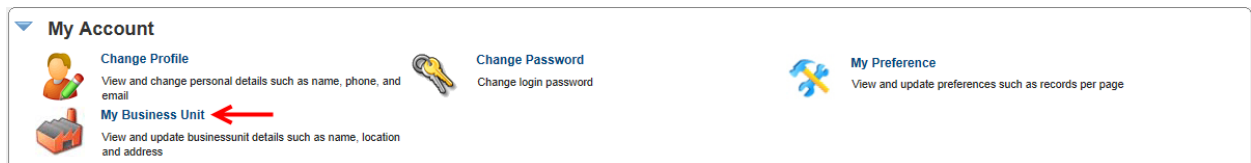
Your spreadsheet is now ready for the upload.

Inventory Upload Instructions

To navigate to the **Inventory Upload** screen, Click on “**My Account**”



Click on “**My Business Unit**”



Click on the “**Inventory Tab**”



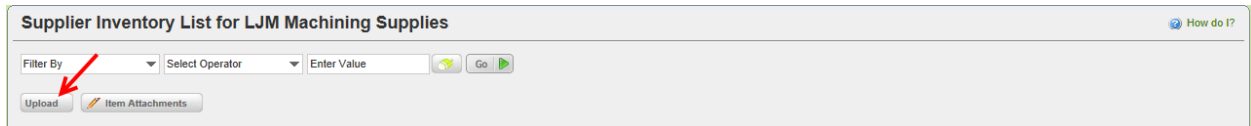
Click on the “**Upload Inventory**” button (**Screenshot #1**) if this is your **first upload**. Click on the “**Upload**” button, (**Screenshot #2**), if you have **uploaded the data before**.

(If you have uploaded data prior to this, you will not see screenshot #1).

Screenshot #1



Screenshot #2



Click on the “Browse” button

Load Supplier Inventory Data How do I?

Please upload the following files. The file should be TAB delimited. The first row should contain header columns and the column names should match with the sample file given below. Download the sample file for your reference by clicking the Sample File Download link.

* Select Supplier Inventory data file: **Browse...** [Click here to Download Sample File](#)

* Required field **Upload File(s)** | **X** | **Cancel**

Select the File and click on the “Upload Files” button

Load Supplier Inventory Data How do I?

Please upload the following files. The file should be TAB delimited. The first row should contain header columns and the column names should match with the sample file given below. Download the sample file for your reference by clicking the Sample File Download link.

* Select Supplier Inventory data file: **Browse...** [Click here to Download Sample File](#)

* Required field **Upload File(s)** | **X** | **Cancel**



Important – The file must be a Tab Delimited Text file. Click on the link below for detailed instructions on setting up your spreadsheet and saving as a tab delimited.

[Sample File and General Spreadsheet Set-up](#)

Here is a **Preview** of the **Source Data** in the Upload Wizard section. **Click** the “**Next**” button if this is correct.



Important – If your data is not correct, select “**Cancel**” and check the data in your spreadsheet for the error and make the necessary adjustments.

Upload Wizard: Preview Source Data ←

Preview Source Data Import Data Prepare & Save

Please review your input data given below. You can change the date format and decimal separator as per your data file.

File Data Format

Date Format: +YMD Field Delimiter: TAB Decimal Separator: Period

JOBERPSUPPLIERINVENTORYDATA data file

Total Lines: 5 Error Lines: 0 Empty Lines: 1

Line #	A	B	C	D	Status
1	SupplierItemCode	SupplierItemDesc	OnHandQty	ListPricePerUOM	
2	24699	SHAFT	250	10.1	
3	24689	MACHINE PART	1200	3.144	
4	24688	BEARING	200	11.11	

Click Next to Import the Data.

Next | X | Cancel

Review the information, click on the “**Finish**” button. *This is the data that is being imported.*

Upload Wizard: Import Data ←

Preview Source Data Import Data Prepare & Save

JOBERPSUPPLIERINVENTORYDATA Data has been imported successfully.

Top 3 of 3 imported records

EBJ GID	EBJ BATCHGID	EBJ LINENUM	EBJ STATUS CODE	EBJ STATUS CHGTIME	EBJ STATUS MSG	EBJ LAST UPDATE	EBJ BUGSID	EBJ BUSCODE	EBJ ITEMNO	EBJ RESERVED1	EBJ RESERVED2	EBJ RESERVED3	EBJ RTPARAMS	Supplier GID	Supplier Item Code	Supplier Item Desc	On Date	On Hand Qty	List Price Per UOM
		0		1899-12-30 00:00:00		1899-12-30 00:00:00				0.0000		1899-12-30 00:00:00		24699	SHAFT		1899-12-30 00:00:00	250.0000	10.101
		0		1899-12-30 00:00:00		1899-12-30 00:00:00				0.0000		1899-12-30 00:00:00		24689	MACHINE PART		1899-12-30 00:00:00	1200.0000	3.1444
		0		1899-12-30 00:00:00		1899-12-30 00:00:00				0.0000		1899-12-30 00:00:00		24688	BEARING		1899-12-30 00:00:00	200.0000	11.111

Required field

Prev | Finish | X | Cancel

The **data** has been **uploaded**. *The list will include part numbers from prior uploads.*

*If you would like to only view items from this run, go to the next page for the “**Filtering Instructions**”.*

Supplier Item No. ▲	Description ▾	Supplier On Hand Qty ▾	Unit Description ▾	List Price Per UOM ▾	On Date ▾	Last Uploaded Date ▾	Uploaded By ▾
24680	24680	250	EA	55.55	12/10/2013	12/10/2013	Laura Maki
24688	BEARING	200	EA	11.11	12/11/2013	12/11/2013	Laura Maki
24689	MACHINE PART	1,200	EA	3.14	12/11/2013	12/11/2013	Laura Maki
24699	SHAFT	250	EA	10.10	12/11/2013	12/11/2013	Laura Maki
ULT-035-0322-00	ULT-035-0322-00	25,200	EA	10.10	12/10/2013	12/10/2013	Laura Maki
ULT-035-0354-02	ULT-035-0354-02	28,800	EACH	25.25	12/10/2013	12/10/2013	Laura Maki

Sorted by: Supplier Item No. 1 to 6 of 6

Inventory Upload Filtering Instructions



Quick Tip - Once the upload of the data is complete, “Filter” options are available when looking for specific information. The “Filter” options are, “Supplier Item No., Description, Supplier On-Hand Quantity and On Date”. Our example below is “On Date” (the date we ran the upload)

Click on the **drop down arrow** in the “**Filter By**” field.

Supplier Inventory List for LJM Machining Supplies How do I?

Filter By Select Operator Enter Value

Find Supplier Item No.

Select “**On Date**”

Supplier Inventory List for LJM Machining Supplies How do I?

Filter By Select Operator Enter Value

Supplier Item No.

Description

Supplier On Hand Qty

On Date

Click on the **drop down arrow** in the “**Select Operator**” field.

Supplier Inventory List for LJM Machining Supplies How do I?

On Date Select Operator Enter Value

Find Supplier Item No.

Select “**Equal To**”

Supplier Inventory List for LJM Machining Supplies How do I?

On Date Select Operator Enter Value

Find Supplier Item No.

Upload

Profile

Equal To

Not Equal To

Greater Than

Greater Than Or Equal To

Lesser Than

Lesser Than Or Equal To

Click in the “**Enter Value**” field and a **calendar** appears. Click on the” **Date**” of the last **upload** to select it and the **date will appear**. Click on the “**Go**” button.

Supplier Inventory List for LJM Machining Supplies How do I?

On Date Equal To 12/11/2013

Find Supplier Item No.

The data from your selected date has now been populated into the Supplier Inventory List.

Supplier Inventory List for LJM Machining Supplies								How do I?
On Date	Equal To	12/11/2013		Go				
Find Supplier Item No.								
Upload								
Profile	Attachments	Inventory						
Supplier Item No. ▲	Description ▼	Supplier On Hand Qty ▼	Unit Description ▼	List Price Per UOM ▼	On Date ▼	Last Uploaded Date ▼	Uploaded By ▼	
24688	BEARING	200	EA	11.11	12/11/2013	12/11/2013	Laura Maki	
24689	MACHINE PART	1,200	EA	3.14	12/11/2013	12/11/2013	Laura Maki	
24699	SHAFT	250	EA	10.10	12/11/2013	12/11/2013	Laura Maki	

Supplier Queue – View your On Hand Inventory

To navigate to the “Supplier Queue”, click on “Actions”



Click on “Supplier Queue”

Supplier Actions

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

The “On-Hand Quantity” can now be viewed in the “Supplier Queue”

Supplier Queue Items List

Plant: TBJ | Show: Items List | Category: RYG | Product Line: All | Commodity Code: 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		Put Away		Others		Total Cards	On Hand At Supplier	
				Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty		Cards	Qty
	24688	BEARING	0	5	50	23	230	0	0	0	0	0	0	0	0	0	0	0	0	28	20	200
	24689	Machine Part	0	0	0	2	800	0	0	0	0	4	1,600	0	0	0	0	0	0	6	3	1,200
	24699	SHAFT	0	2	100	13	650	0	0	0	0	0	0	0	0	0	0	0	0	15	5	250
	SM-5344-025/035-0355-00	Bearing	0	54	777,600	3	43,200	4	57,600	0	0	0	0	0	0	0	0	0	0	61	0	0
	SU-4576-016/035-0354-00	BEARING-SLEEVE	0	1	0	6	75,600	0	0	0	0	2	25,200	0	0	0	0	0	0	9	0	0
	SU-6193-018/035-0354-02	DU Bearing	0	1	14,400	0	0	6	86,400	0	0	0	0	0	0	0	0	0	0	7	0	0