



Ultriva 7.6 and Higher

Tips and Tricks

Reference Guide

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Filters



Quick Tip - Filters are shortcuts that can be set up for personalizing the data view for each user logged into Ultriva.

From the **“Home”** screen, **hover** the **mouse** over the **“Filter”** icon to view the current **“Filter Details”**. This shows that **you are viewing “All items”, “All Product Lines”, “All Commodity Codes” and “All Categories”**.

The screenshot displays the Ultriva 7.5 Buyer Home interface. The top navigation bar includes the Ultriva logo, the version number 'Ultriva 7.5', and links for 'Admin | My Account | Help | Logout'. The user 'Laura Maki' is logged in. The main navigation bar shows 'Home' (circled in red), 'Material Status', 'Actions', 'Scan', 'Reports', and 'Integration'. The 'Buyer Home' section contains several widgets: 'Inventory Health' with three cards for stock out risk (72 High, 284 Medium, 2588 Low), 'Order Tracking' with four cards for orders (10 awaiting approval, 3222 not yet acknowledged, 6188 past due for shipping, 6373 past due for receipt), 'MRP Forecasts Planned Orders', 'Alerts' with a table of recent events, 'My Routines' with daily and monthly tasks, and 'MRP Recommendations'. A red arrow points to the 'Filters' icon in the top right, which has opened a 'Filter Details' dropdown menu. The menu shows the current filter settings: 'Show: All Items', 'Product Line: All', 'Commodity Code: All', and 'Category: All'. Another red arrow points to the 'Filter Details' dropdown menu.

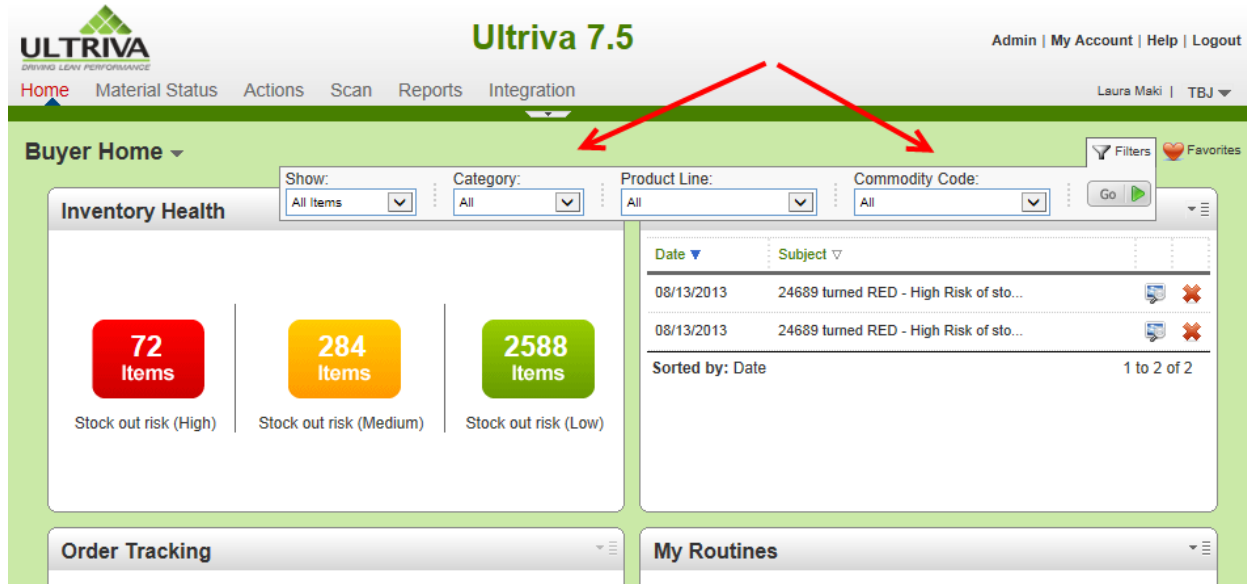
Date	Subject
08/13/2013	24689 turned RED - High Risk of sto...
08/13/2013	24689 turned RED - High Risk of sto...

Sort by	Page
Sorted by: Date	1 to 2 of 2

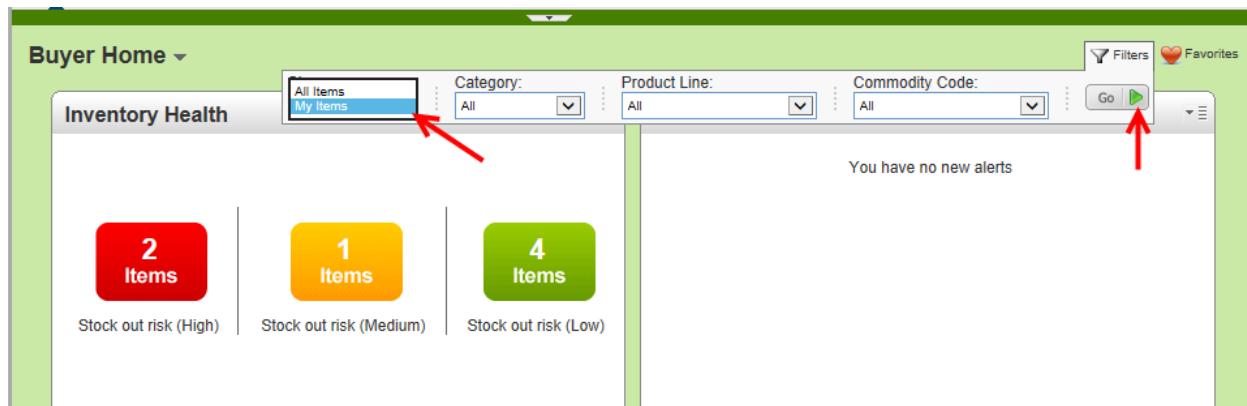
Filter Details	
Show	All Items
Product Line	All
Commodity Code	All
Category	All

Daily	Monthly
<ul style="list-style-type: none">Release OrdersReceive GoodsCreate Spike OrderAnalyze Material StatusApprove Virtual KanbanView Receipts Due	<ul style="list-style-type: none">Analyze Supplier PerformanceAnalyze Cycle TimeAnalyze Inventory SavingsAnalyze Stock outAnalyze Kanban Inventory

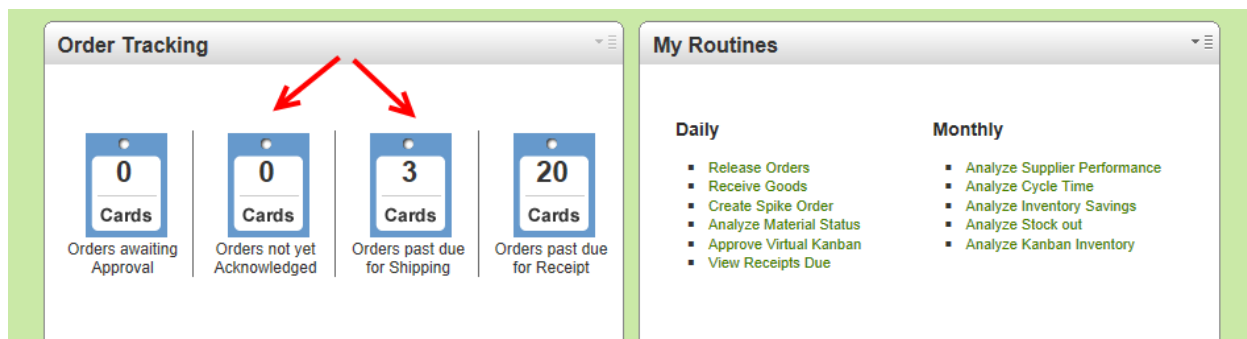
Click on the “Filter” icon to **change** how the **filter** is set.



Click on the **drop down arrow** in the “Show” field. Select “My Items”. Click on the “Go” button.

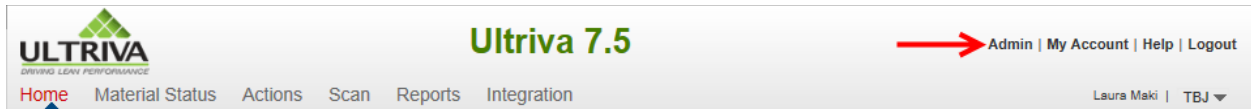


The **items** now appear. Optional: **Repeat the steps** above to **return** the filter back to “All Items”.

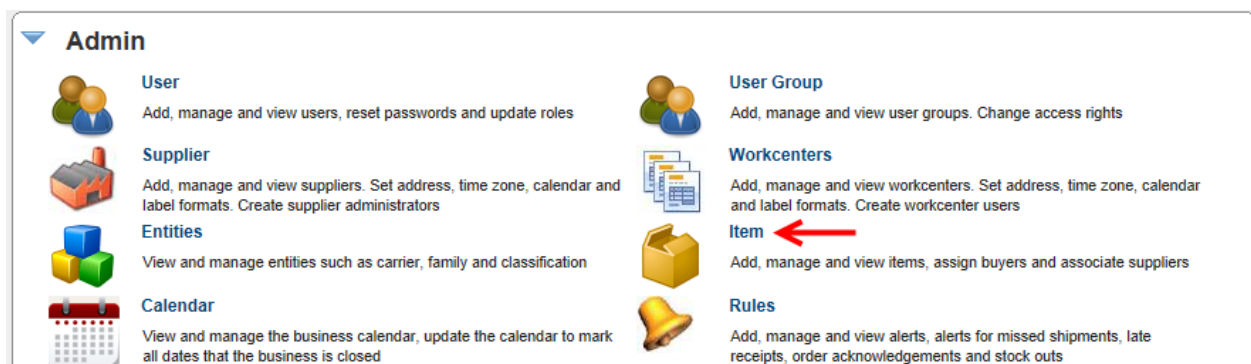


Custom Filter Views

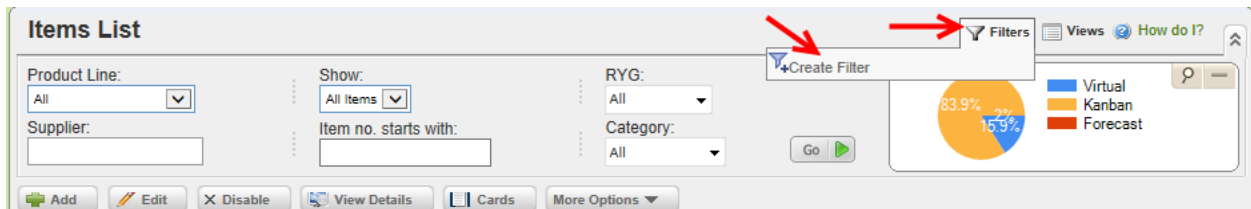
To navigate to setting up a “Custom Filter”, click on “Admin”.



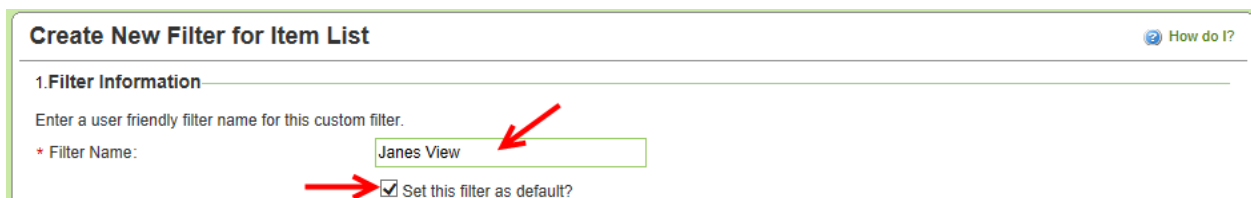
Click on “Item”



Click on the “Filter” icon and click on “Create Filter”.



Enter a “Filter Name”. Click in the box next to “Set this filter as default?” (By setting this as the “Default” this filter will open up when opening the filters).



Click on the **drop down arrow** in the “**Filter By**” field and **Select** a “**Filter By**” option.
In this example we will use Default Supplier.

Filter By	Select O
Item	
Description	
Default Supplier	
Product Line	
Commodity Code	
SafetyStock	
Handling Time	
Qty On Card	
UsagePerDay	
Coordinator	
UOM	
Location Code	

The **selection appears**. Click on the **drop down arrow** in the “**Starts With**” field and make your filter selection. *Example = “Default Supplier”*. Select “**Equal To**” for our “**Operator**” selection.

2. Configure Filter

Please select field, select an operator, enter value and click Add to add the filter condition. You may add any number of filter conditions.

Default Supplier Select Operator Enter Value Add

Field Name	Operator	Filter Value	Action

* Required field

Save | > X | Cancel

The **selection appears**. Enter the “**Suppliers Name**” and click on the “**Add**” button.

2. Configure Filter

Please select field, select an operator, enter value and click Add to add the filter condition. You may add any number of filter conditions.

Default Supplier Equal To LJM Add

Field Name	Operator	Filter Value	Action

* Required field

Save | > X | Cancel

Your selections appear. Click on the “Save” button

Create New Filter for Item List

How do I?

1. Filter Information

Enter a user friendly filter name for this custom filter.

* Filter Name: ☒ Set this filter as default?

2. Configure Filter

Please select field, select an operator, enter value and click Add to add the filter condition. You may add any number of filter conditions.

Default Supplier Equal To LJM

Field Name	Operator	Filter Value	Action
Default Supplier	Equal To	LJM	

* Required field

The “Filter Created Successfully” and the item (parts) list are below for the “Supplier” selected in the filter.

Items List

Filters Views How do I?

Product Line: Show: RYG: Category:

Supplier: Item no. starts with:

Filter Created Successfully

Category	Item	Description	Qty On Card	No. Of Cards	Default Supplier
Kanban	585100R070B0	585100R070B0	1	0	Not Associated
Kanban	587000000000	PLATE, MAT SET, UPR	100	0	Not Associated
Kanban	633100R070B1	633100R070B1	16	0	Not Associated
Kanban	633100R080B1	633100R080B1	16	0	Not Associated



Quick Tip – To “Edit” or “Delete” a filter, click on the “Pencil” icon to Edit or the “Red X” to Delete

Items List

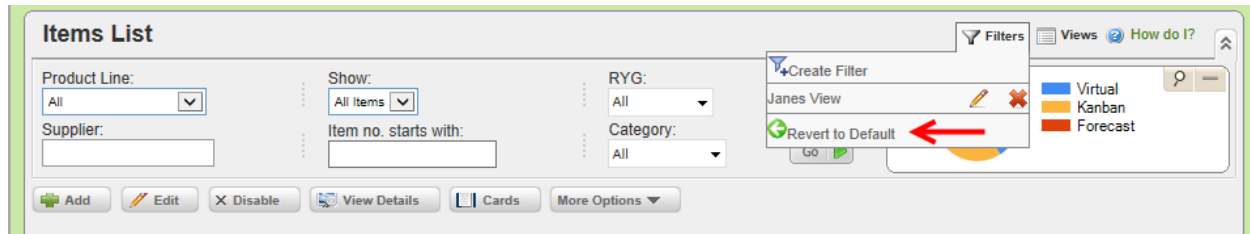
Filters Views How do I?

Product Line: Show: RYG: Category:

Supplier: Item no. starts with:

Janes View

To “**Revert**” back to **viewing all items**, click on “**Revert to Default**” and “**All Items**” will now **appear** on the screen.



Changing the Filter Views - Ascending or Descending



Quick Tip – The data can be sorted by columns. The triangle located at the column header with the (blue) fill is the sort trigger. The column would then be sorted in “Ascending or Descending” order based on the position of the triangle. The triangle pointed up will “Ascend” sort the selection and triangle pointing down will “Descend” sort the selection.

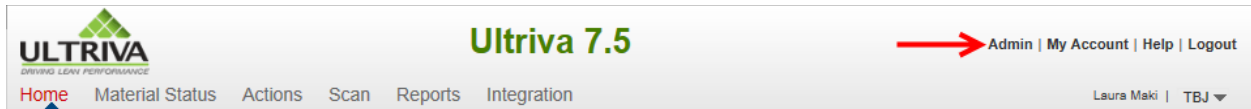
To **change** the “Screen View” and sort the data, **click** on the **triangle** at the column heading. Your data will change accordingly

The screenshot shows the 'Items List' interface. At the top, there are filter controls for Product Line (All), Show (All Items), RYG (All), Supplier, Item no. starts with, and Category (All). A 'Go' button is next to the Category filter. A pie chart on the right shows the distribution: 83.9% Virtual (blue), 15.3% Kanban (orange), and 7% Forecast (red). Below the filters is a toolbar with buttons for Add, Edit, Disable, View Details, Cards, and More Options. A blue notification box states 'Filter Created Successfully'. The main table has columns: Category, Item, Description, Qty On Card, No. Of Cards, and Default Supplier. The 'Item' column header has a blue triangle pointing up, indicating an ascending sort. A red arrow points to this triangle. The table lists several Kanban items with their descriptions, quantities, and suppliers.

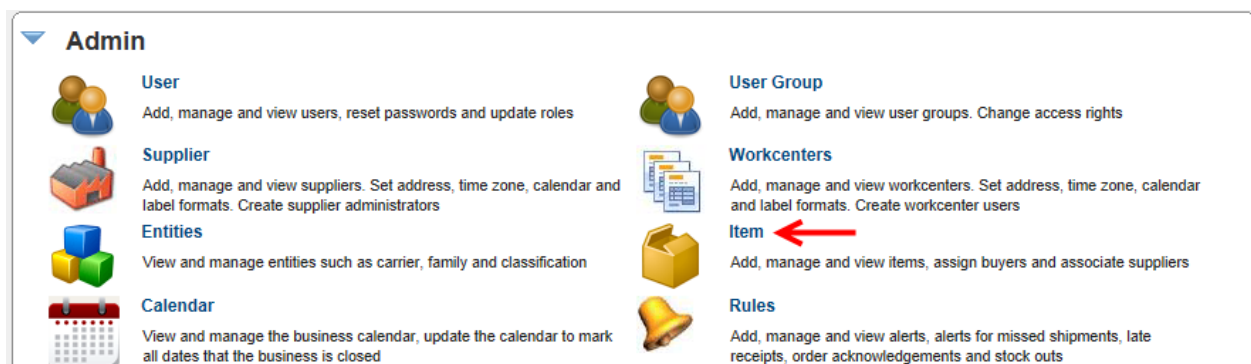
Category ▾	Item ▲	Description ▲	Qty On Card ▲	No. Of Cards ▲	Default Supplier ▾
Kanban	585100R070B0	585100R070B0	1	0	Not Associated
Kanban	587000000000	PLATE, MAT SET, UPR	100	0	Not Associated
Kanban	633100R070B1	633100R070B1	16	0	Not Associated
Kanban	633100R080B1	633100R080B1	16	0	Not Associated
Kanban	63351-X1B00-00	63351-X1B00-00	100	0	Not Associated

Custom Filter Views

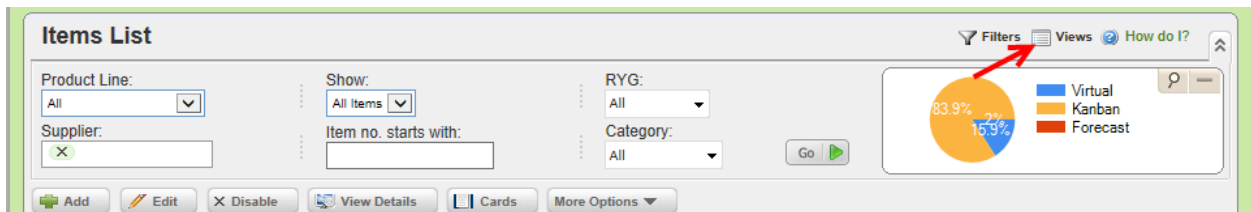
To navigate to setting up a “Custom Filter Views”, click on “Admin”.



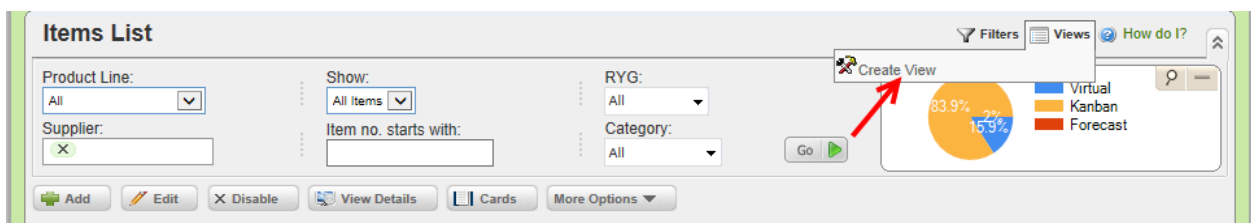
Click on “Item”



Click on the “Views” icon.



Click on “Create View”



Enter the “View Name”, Optional: -“Set this view as default?” (By setting this as the “Default” this filter will open up when opening the custom filter views)

Customize Page: Item List How do I?

1. View Information

Enter a user friendly View Name and Description for this Custom View.

• View Name:

• Description:

☐ Set this view as default?



Quick Tip – By highlighting a line and selecting the greater than sign it will move the line to the Sort Fields screen

Make your selections for the “Customized Sort” options

Available Fields

- RYG Status
- Category
- Item
- Description**
- Qty On Card
- Default Supplier
- Product Line
- Commodity Code
- No.Of Cards

Sort Fields

- A-No.Of Cards
- A-Item**
- A-Qty On Card

Make your selections for the “Customized Display” options. Repeat the steps above.

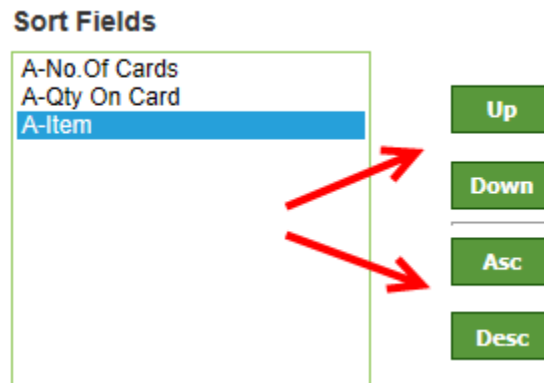
Available Fields

- RYG Status
- Category
- Item
- Description
- Qty On Card**
- Default Supplier
- Product Line
- Commodity Code
- No.Of Cards

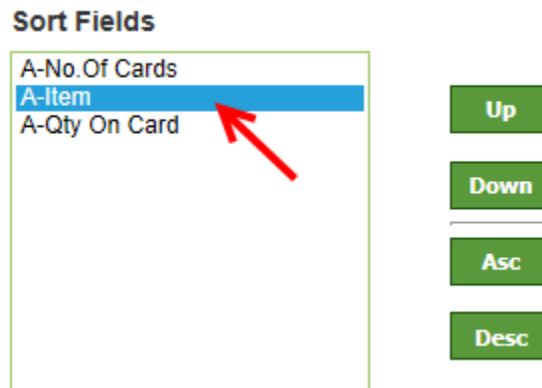
Sort Fields

- A-No.Of Cards
- A-Item
- A-Qty On Card
- A-Description**

By highlighting a line and selecting Up, Down, Asc, or Desc you can change the order of the sort.



Example: With “A-Item” highlighted, click on the “Up” button and the “A-Item” will move up the list 1 slot. See below.



Click on the “Save” button when **all** of the **selections** have been **made**.

Select fields to use for Sorting the Item list. You can also use Ascending or Descending option

Available Fields
 RYG Status
 Category
 Item
 Description
Qty On Card
 Default Supplier
 Product Line
 Commodity Code
 No.Of Cards

>

Sort Fields
 A-No.Of Cards
 A-Item
 A-Qty On Card
 A-Description

Up
 Down
 Asc
 Desc

3.Customize Display


Select fields to display on the Item list You can also re-order the selected fields

Available Fields
 RYG Status
 Category
 Item
 Description
 Qty On Card
 Default Supplier
Product Line
 Commodity Code
 No.Of Cards
 Status
 SafetyStock
 Handling Time

>

Show Fields
 Category
 Item
 Description
 Qty On Card
No.Of Cards
 Default Supplier

Up
 Down

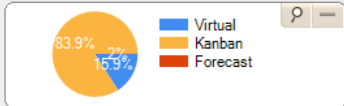

Save | » X | Cancel

* Required field

The **view** has been **created successfully**

Items List
Filters Views How do I?

Product Line: All
 Supplier: X
 Show: All Items
 Item no. starts with:
 RYG: All
 Category: All
 Go

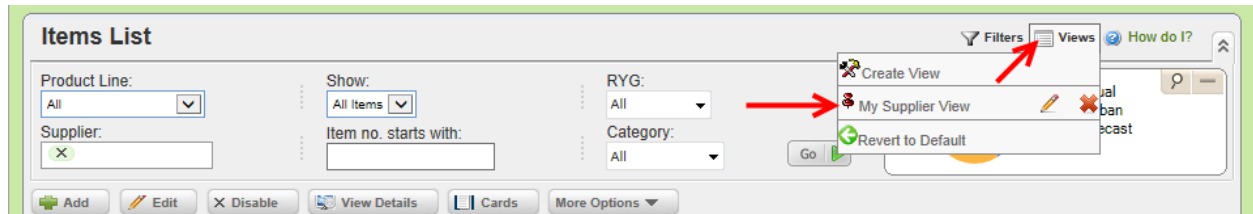


Add Edit X Disable View Details Cards More Options

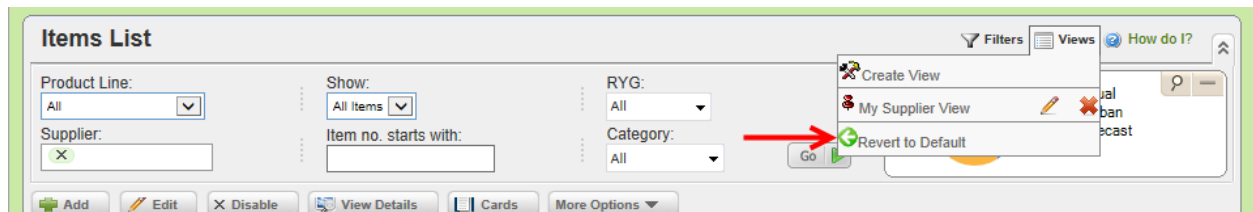
View created successfully

Category ▾	Item ▲	Description ▲	Qty On Card ▲	No. Of Cards ▲	Default Supplier ▾
Kanban	ULT-035-0322-00	Bearing	600	0	LJM Machining Supplies
Kanban	ULT-035-0354-02	DU Bearing	14400	7	LJM Machining Supplies
Kanban	ULT-035-0354-00	BEARING-SLEEVE	12600	9	LJM Machining Supplies
Kanban	24687	SHAFT	50	15	LJM Machining Supplies

Click on the “View” icon, the “View” has been **added to the list**.



The **view created** we set as the **default view**. To get back to the regular view, click on “**Revert to Default**”.



Quick Tip – Only on pages in Ultriva where you see the Filter and View icons is where you can set up the filters and views accordingly.



Page Filters



Quick Tip –Ultriva has a Filter option on most screenshots within the software. Filtering by item, supplier, PO are a few ways you can filter the data.

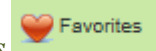
The “**Released Cards Filter**” below is an example of a “**Page Filter**” Make the filter selections by **clicking** on the **dropdown arrows** and making your selections. **Click** on the “**Go**” button.

Once a “**Filter**” is selected, each time this screen is accessed, the same filter will apply. **Click** on the “**Change Filter**” button to change the **current “Filter”**”

Favorites

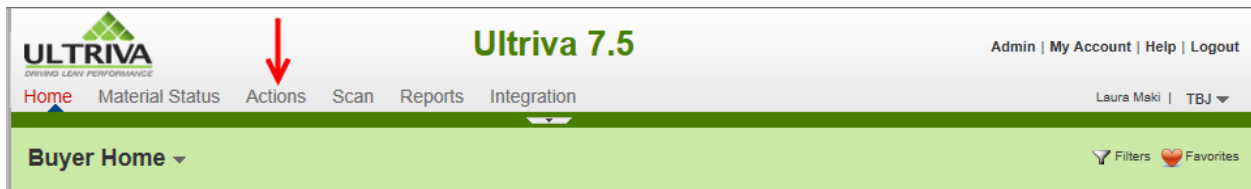


*Quick Tip – Users can add their daily tasks to the Favorites list and can access them from any screen by clicking on the **Favorites Heart**. For Ultriva users with multiple plants, the favorites will carry through to all plants.*

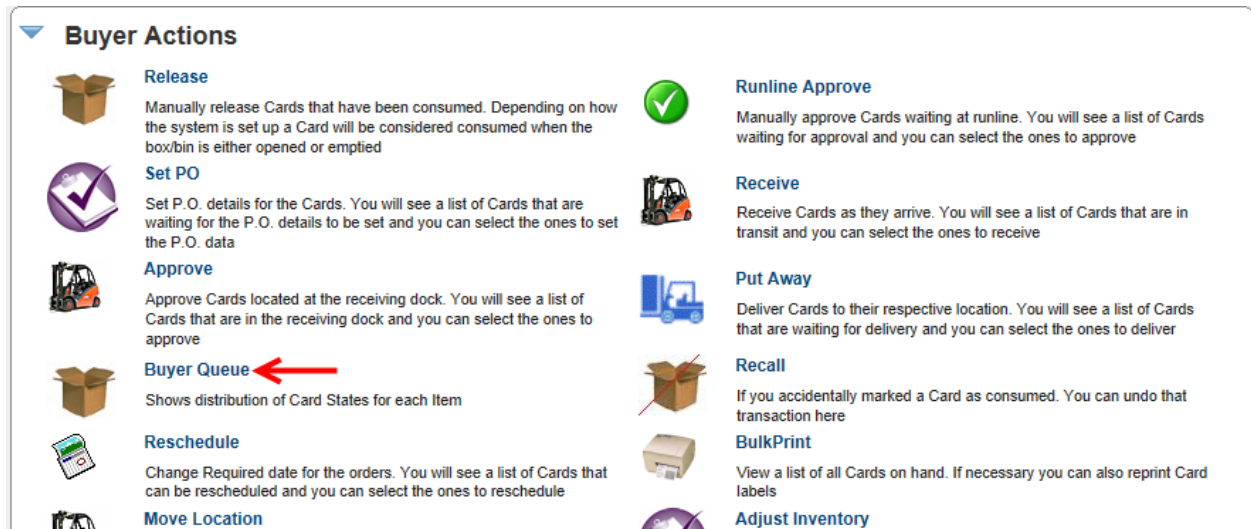


*The example below is setting up the Buyer Queue as a “Favorite”. To add other tasks, navigate to the screen to add and click the on the **Favorites Heart**, then “Add to Favorites”*

To set up the “**Buyer Queue**” in the “**Favorites**” menu, click on “**Actions**”.



Click on “**Buyer Queue**”



The “**Buyer Queue**” screen appears. Click on the “**Favorites**”



Click on “**Add to Favorites**”

Buyer Queue Items List

Supplier: LJM Machining Supplies | Show: All Items X | Category: All | RYG: All | Product Line: All | Commodity Code: All

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

RYG	Item	On Hand		Released		In Process		At Ship Hub		In Transit		Received At Dock		Put Away		Others		Description
		Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	
	24687	15	750	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0	SHAFT
	24688	28	280	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0	BEARING

To navigate to the “**Buyer Queue**” from any screen, click on the “**Favorites Heart**” and select “**Buyer Buyer Queue**”.

ULTRIVA **Ultriva 7.5** Admin | My Account | Help | Logout

Home | Material Status | Actions | Scan | Reports | Integration

Laurs Maki | TBJ

Buyer Home

Inventory Health

- 1 Items: Stock out risk (High)
- 2 Items: Stock out risk (Medium)
- 2 Items: Stock out risk (Low)

Alerts

Date	Subject
08/13/2013	24689 turned RED - High Risk of sto...
08/13/2013	24689 turned RED - High Risk of sto...

Sorted by: Date 1 to 2 of 2

Order Tracking | My Routines

Apply to All - Auto Fill

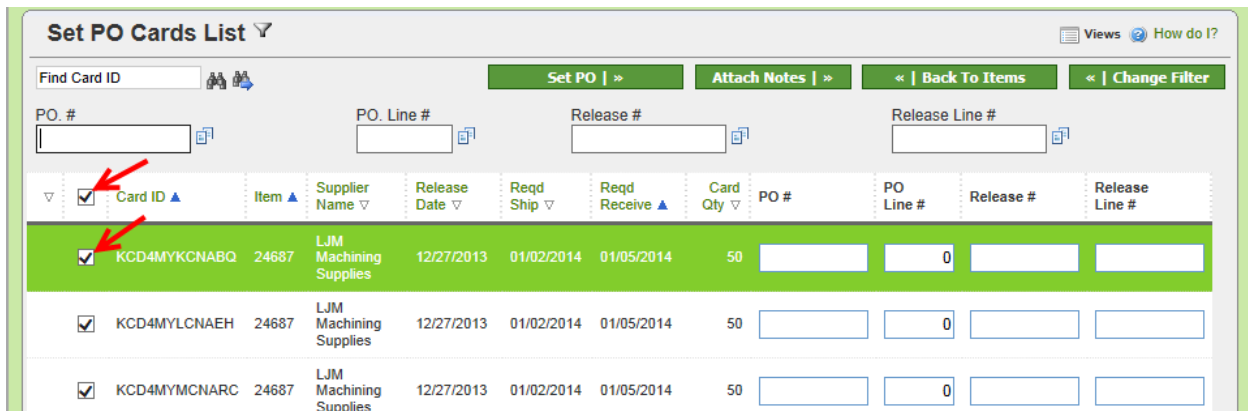


Quick Tip – Click in the “Card ID” box in the column header and it will select all of the cards. A checkmark will appear by each line item.



Tool Tip – The Apply to All icon  is located on all “Action” screens where repeated data is entered. Data such as “Locations”, “PO’s”, new “Ship Dates” and such are a few of the processes where this tool comes in real handy.

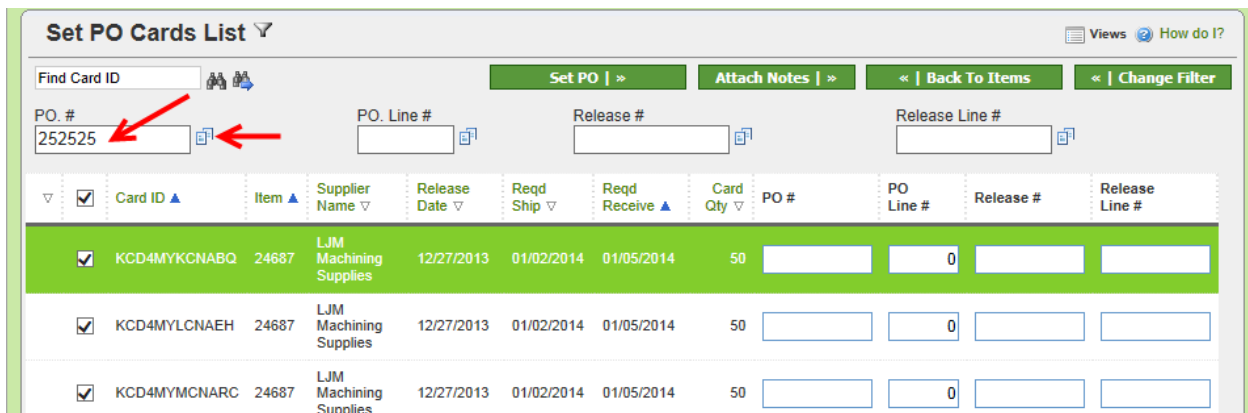
Click in the “Card ID” boxes to select the cards that you are going to work with.



The screenshot shows the 'Set PO Cards List' screen. At the top, there are buttons for 'Set PO | »', 'Attach Notes | »', '<< | Back To Items', and '<< | Change Filter'. Below these are input fields for 'Find Card ID', 'PO. #', 'PO. Line #', 'Release #', and 'Release Line #'. The main table has columns: Card ID, Item, Supplier Name, Release Date, Reqd Ship, Reqd Receive, Card Qty, PO #, PO Line #, Release #, and Release Line #. The 'Card ID' column header has a checkmark and a dropdown arrow. The first row of data is highlighted in green and has a checkmark in the 'Card ID' column. Red arrows point to the 'Card ID' column header and the first row's 'Card ID' cell.

Card ID	Item	Supplier Name	Release Date	Reqd Ship	Reqd Receive	Card Qty	PO #	PO Line #	Release #	Release Line #
<input checked="" type="checkbox"/> KCD4MYKCNABQ	24687	LJM Machining Supplies	12/27/2013	01/02/2014	01/05/2014	50		0		
<input checked="" type="checkbox"/> KCD4MYLCNAEH	24687	LJM Machining Supplies	12/27/2013	01/02/2014	01/05/2014	50		0		
<input checked="" type="checkbox"/> KCD4MYMCNARC	24687	LJM Machining Supplies	12/27/2013	01/02/2014	01/05/2014	50		0		



To “Auto Fill” information such as a “PO” and “PO Line #”, Enter in the “PO#” in the PO# field and Click on the “Apply to All” icon. 








The screenshot shows the 'Set PO Cards List' screen with the 'PO #' field filled with '252525'. Red arrows point to the 'PO #' field and the 'Apply to All' icon. The table structure is the same as the previous screenshot.

Card ID	Item	Supplier Name	Release Date	Reqd Ship	Reqd Receive	Card Qty	PO #	PO Line #	Release #	Release Line #
<input checked="" type="checkbox"/> KCD4MYKCNABQ	24687	LJM Machining Supplies	12/27/2013	01/02/2014	01/05/2014	50		0		
<input checked="" type="checkbox"/> KCD4MYLCNAEH	24687	LJM Machining Supplies	12/27/2013	01/02/2014	01/05/2014	50		0		
<input checked="" type="checkbox"/> KCD4MYMCNARC	24687	LJM Machining Supplies	12/27/2013	01/02/2014	01/05/2014	50		0		

The **data** is now **populated** in **each line** item checked.

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 ▲	Supplier Name ▼	Release Date ▼	Reqd Ship ▼	Reqd Receive ▲	Card Qty ▼	PO #	PO Line #	Release #	Release Line #
<input checked="" type="checkbox"/>	KCD4MYKCNABQ	24687	LJM Machining Supplies	12/27/2013	01/02/2014	01/05/2014	50	<input type="text" value="252525"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	KCD4MYLCNAEH	24687	LJM Machining Supplies	12/27/2013	01/02/2014	01/05/2014	50	<input type="text" value="252525"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	KCD4MYMCNARC	24687	LJM Machining Supplies	12/27/2013	01/02/2014	01/05/2014	50	<input type="text" value="252525"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="text"/>

You can repeat these steps on any screen where repeated data needs to be entered.

My Account – My Preference

Login Preference



Tool Tip - My Preference can add many great features to your Ultriva screen layout including Login Preferences, Style/Color Themes, and Paging Preferences which allows you to choose how many records to view per page. It also has a Screen Layout feature to increase or decrease the viewing area.

To navigate to “My Preference”, click on “My Account”.

The screenshot shows the Ultriva 7.5 Buyer Home dashboard. At the top, there is a navigation bar with the Ultriva logo, the text "Ultriva 7.5", and links for "Admin | My Account | Help | Logout". Below this is a secondary navigation bar with "Home", "Material Status", "Actions", "Scan", "Reports", and "Integration". The main content area is titled "Buyer Home" and contains two panels. The "Inventory Health" panel on the left shows three categories: "Stock out risk (High)" with 1 item, "Stock out risk (Medium)" with 2 items, and "Stock out risk (Low)" with 2 items. The "Alerts" panel on the right shows a table with two rows of alerts, both dated 08/13/2013 and subject "24689 turned RED - High Risk of sto...". A red arrow points to the "My Account" link in the top navigation bar.

Click on “My Preference”

The screenshot shows the Ultriva 7.5 My Account page. At the top, there is a navigation bar with the Ultriva logo, the text "Ultriva 7.5", and links for "Admin | My Account | Help | Logout". Below this is a secondary navigation bar with "Home", "Material Status", "Actions", "Scan", "Reports", and "Integration". The main content area is titled "My Account" and contains a list of links: "Change Profile", "My Preference", "My Business Unit Configuration", "Change Password", and "My Business Unit". A red arrow points to the "My Preference" link. The "My Preference" link is described as "View and update preferences such as records per page".



Quick Tip –This is a great feature for employees that need to maneuver through Ultriva to get to the screen they need to work from. If set up correctly, it will log them directly into the screen they need to start their work from.

Click on the **drop down arrow** in the “After Login Go To” field.


Login Preference


After Login Go To Default 

My Default Login Business Unit TBJ 

Click on your selection.

Login Preference

After Login Go To Receive Cards 

My Default Login Business Unit TBJ 

Style Preference

My Theme

Paging Preference

* Show:

- Approve Cards
- Buyer Status
- Buyer Queue
- Default
- Outstanding Shipment
- Receive Cards
- Release Cards
- Scan/Receive
- Scan/Release
- Supplier Performance
- Spike Order
- Operation Analysis
- Virtual Kanban Approval
- Production Sequence
- Resequence Production Orders




Quick Tip – Receive Cards (in this example) is a great screen to log into for employees receiving goods at the dock. If chosen, when logging in they will go directly to the Receive Cards screen. You have many other selections to choose from based on the actions that need to be performed in Ultriva.

The selection appears


Login Preference


After Login Go To Receive Cards 

My Default Login Business Unit TBJ 

Click on the **drop down arrow** in the “My Default Login Business Unit” field.

Login Preference

After Login Go To Receive Cards 

My Default Login Business Unit TBJ 



Quick Tip – Business Units such as Plants, Suppliers, and Internal Work Centers can be selected.

Select the “**My Business Unit**” for the user to log into.

Login Preference

After Login Go To: Receive Cards

My Default Login Business Unit: TBJ (selected), Final Assembly, FG Warehouse, Supermarket, Body Assembly Cell 1, Body Assy Cell 1 Supermarket

Style Preference

My Theme

Style Preference



Quick Tip –Style preference allows you to choose a new color for your screen background.

To select a **background color**, Click on the drop down arrow in the “**My Theme**” field.

Style Preference

My Theme: Green (selected), Blue, Pink, Green

Click on a new “**color**” to select it.

Style Preference

My Theme: Blue (selected), Pink, Green

Paging Preference



Quick Tip –The default number of line items to view, per page is set at 10 in Ultriva. You can change the number of line items to view here. The benefit to adding line items per page reduces the number of pages you have to view when you have multiple items/pages set up in Ultriva.

Click in the “**Show records per page**” field and remove the existing number by clicking the backspace button. “**Add the new number**”

Paging Preference

* Show: 10 records per page

Screen Layout: Use maximum width



Quick Tip – The Screen Layout has 2 options: “1024 pixels” which is a narrower page view and “Use Maximum Width” which will show more columns per page. Below are 2 screenshots. Screenshot #1 is the screen at “1024 pixels” and screenshot #2 is the “Use Maximum Width”

Screenshot #1 “1024 Pixels” (narrower page)

Paging Preference

* Show: records per page

Screen Layout

* Required field

Save | X | Cancel

Screenshot #2 “Use Maximum Width” (wider page for viewing)

Paging Preference

* Show: records per page

Screen Layout

* Required field

Save | X | Cancel

To increase the screen size from “1024 pixels” (**default**), Click on the drop down arrow in the “Screen Layout” field and Select “Use maximum Width”.

Paging Preference

* Show: records per page

Screen Layout

Click on the “Save” button

Logging out and logging back in is required for some changes to take effect.

My Preference

General Actions

Login Preference

After Login Go To

My Default Login Business Unit

Style Preference

My Theme

Paging Preference

* Show: records per page

Screen Layout

* Required field

Save | X | Cancel

Export and Print



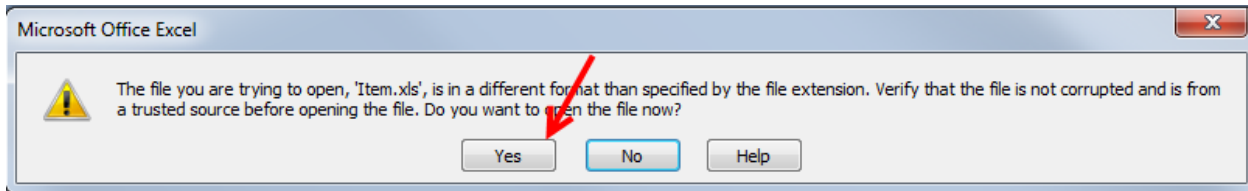
Quick Tip – On all screens that have the Print and Export icons, the data can be printed and/or exported to an Excel document.



To “Export” data from the “Items List” screen (example), click on the “Export” icon.

Category	Item	Description	Qty On Card	No. Of Cards	Default Supplier
Kanban	ULT-035-0322-00	Bearing	600	0	LJM Machining Supplies
Kanban	ULT-035-0354-02	DU Bearing	14400	7	LJM Machining Supplies
Kanban	ULT-035-0354-00	BEARING-SLEEVE	12600	9	LJM Machining Supplies

Click on the “Yes” button.



The **data appears**. You **can** now **print/sort** this **data** as you would normally print an excel spreadsheet.

Category	Item	Description	Qty On Card	No. Of Cards	Default Supplier
Kanban	24689	Machine Part	400	0	LJM Machining Supplies
Kanban	ULT-035-0354-00	BEARING-SLEEVE	12600	2	LJM Machining Supplies
Kanban	ULT-035-0354-02	DU Bearing	14400	7	LJM Machining Supplies
Kanban	ULT-035-0355-00	Bearing	14400	11	LJM Machining Supplies
Kanban	ULT-035-0322-00	Bearing	600	14	LJM Machining Supplies

Click on the “Print” icon.

Items List

Product Line: All Show: All Items RYG: All Category: All

Supplier: X Item no. starts with: Go

83.9% Virtual 15.9% Kanban 2% Forecast

Category	Item	Description	Qty On Card	No. Of Cards	Default Supplier
Kanban	24689	Machine Part	400	0	LJM Machining Supplies
Kanban	ULT-035-0354-00	BEARING-SLEEVE	12600	2	LJM Machining Supplies
Kanban	ULT-035-0354-02	DU Bearing	14400	7	LJM Machining Supplies
Kanban	ULT-035-0355-00	Bearing	14400	11	LJM Machining Supplies
Kanban	ULT-035-0322-00	Bearing	600	14	LJM Machining Supplies


Sorted by: No.Of Cards, Item, Qty On Card, Description 1 to 5 of 5

The “Print Preview” screen appears. This page can now be printed.

Items List

Category	Item	Description	Qty On Card	No. Of Cards	Default Supplier
Kanban	24689	Machine Part	400	0	LJM Machining Supplies
Kanban	ULT-035-0354-00	BEARING-SLEEVE	12600	2	LJM Machining Supplies
Kanban	ULT-035-0354-02	DU Bearing	14400	7	LJM Machining Supplies
Kanban	ULT-035-0355-00	Bearing	14400	11	LJM Machining Supplies
Kanban	ULT-035-0322-00	Bearing	600	14	LJM Machining Supplies

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 **Tool Tip – This is a great tool if you need to print a schedule from the Internal Module Production Sequence also. It will give you a snap shot of the daily/weekly schedule.**

Collapse and Expand the Screen

From any screen, with the **arrow pointing down**, the “Title Bar” can “Collapse”. Click on the **down arrow**.

The screenshot shows the Ultriva 7.5 interface. The title bar is expanded, showing the Ultriva logo, the text 'Ultriva 7.5', and navigation links: Home, Material Status, Actions, Scan, Reports, and Integration. A red arrow points to the down arrow in the title bar. Below the title bar, the 'Items List' screen is visible, featuring filters, a table of items, and a pie chart.

Category	Item	Description	Qty On Card	No. Of Cards	Default Supplier
Kanban	24689	Machine Part	400	0	LJM Machining Supplies
Kanban	ULT-035-0354-00	BEARING-SLEEVE	12600	2	LJM Machining Supplies
Kanban	ULT-035-0354-02	DU Bearing	14400	7	LJM Machining Supplies
Kanban	ULT-035-0355-00	Bearing	14400	11	LJM Machining Supplies
Kanban	ULT-035-0322-00	Bearing	600	14	LJM Machining Supplies

The “Title Bar” has now “Collapsed” and there is **more screen viewing space**.

The screenshot shows the Ultriva 7.5 interface with the title bar collapsed. A red arrow points to the up arrow in the title bar. The 'Items List' screen is visible below the collapsed title bar.

Category	Item	Description	Qty On Card	No. Of Cards	Default Supplier
Kanban	24689	Machine Part	400	0	LJM Machining Supplies
Kanban	ULT-035-0354-00	BEARING-SLEEVE	12600	2	LJM Machining Supplies
Kanban	ULT-035-0354-02	DU Bearing	14400	7	LJM Machining Supplies
Kanban	ULT-035-0355-00	Bearing	14400	11	LJM Machining Supplies
Kanban	ULT-035-0322-00	Bearing	600	14	LJM Machining Supplies

Click the “Arrow” again to “Expand” the title bar **back** onto the screen.

The screenshot shows the Ultriva 7.5 interface with the title bar expanded. A red arrow points to the down arrow in the title bar. The 'Items List' screen is visible below the expanded title bar.

Category	Item	Description	Qty On Card	No. Of Cards	Default Supplier
Kanban	24689	Machine Part	400	0	LJM Machining Supplies
Kanban	ULT-035-0354-00	BEARING-SLEEVE	12600	2	LJM Machining Supplies
Kanban	ULT-035-0354-02	DU Bearing	14400	7	LJM Machining Supplies
Kanban	ULT-035-0355-00	Bearing	14400	11	LJM Machining Supplies
Kanban	ULT-035-0322-00	Bearing	600	14	LJM Machining Supplies

Data Search



Quick Tip – Data Search allows a search for any information in Ultriva by using the Search shortcut. PO's, Po Line #'s, Items, Card ID's are just a few examples. When searching for a PO and PO Line # you must place a dash (syntax) in between the PO and the PO Line #. Example: PO 123456-1000.

On the bottom “Task Bar”, Click in the “Search” box

Ultriva 7.5

Admin | My Account | Help | Logout

Home Material Status Actions Scan Reports Integration

Laura Maki | TBJ

Admin > Item

Print Export Favorites

Items List

Filters Views How do I?

Product Line: All Show: All Items RYG: All Category: All

Supplier: X Item no. starts with: Go

Add Edit X Disable View Details Cards More Options

Category	Item	Description	Qty On Card	No. Of Cards	Default Supplier
Kanban	24689	Machine Part	400	0	LJM Machining Supplies
Kanban	ULT-035-0354-00	BEARING-SLEEVE	12600	2	LJM Machining Supplies
Kanban	ULT-035-0354-02	DU Bearing	14400	7	LJM Machining Supplies
Kanban	ULT-035-0355-00	Bearing	14400	11	LJM Machining Supplies
Kanban	ULT-035-0322-00	Bearing	600	14	LJM Machining Supplies

Sorted by: No. Of Cards, Item, Qty On Card, Description 1 to 5 of 5

Search...

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Here we will search for a “Card ID”. Enter the “Card ID” and Click on the “Magnifying Glass” icon to perform the search action.


kcd298ecnaip

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The search results appear.

Search results for KCD4MVDNAPK [How do I?](#)

Item (1 results found)

RYG	Business Name	Item	Description	Category	Default Supplier	Qty On Card	Cards On Hand	Cards On Order	No. Of Cards
	TBJ	24680	Widget	Kanban	LJM Machining Supplies	50	0	20	20

1 to 1 of 1

Card (1 results found)

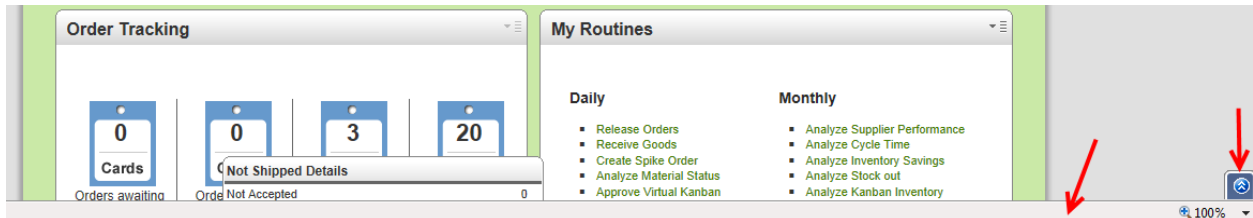
Supplier (0 results found)

Hide the Task Bar

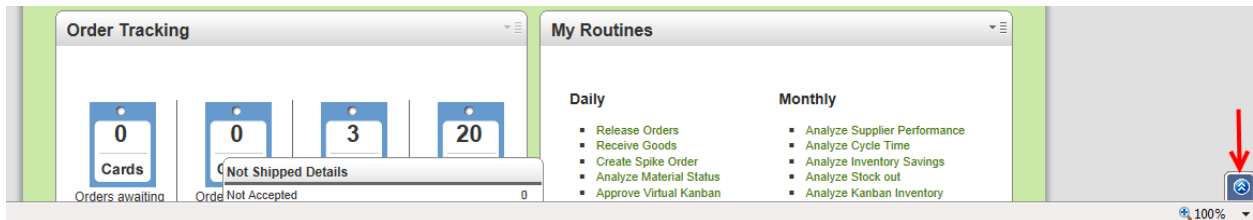
At the **bottom right hand** side of the screen, **click** on the “**Hide Taskbar**” icon



The “**Taskbar**” is now **hidden**.



To **Restore** the “**Taskbar**”, **click** on the “**Taskbar**” icon with the up arrow



The “**Taskbar**” is now **restored**



Open a New Session in IE (Internet Explorer)



Quick Tip – When viewing a screen in Ultriva and without closing the current view, another instance of Ultriva can be opened in Internet Explore. This is a great feature for viewing the “Supplier” and/or the “Buyer” information at the same time.

“Right Click” on your mouse button and select “Open in new tab”.

The screenshot shows the Ultriva 7.5 interface. The 'Material Status' tab is active. A right-click context menu is open over the 'Material Status' link in the top navigation bar. The menu options are: Open, Open in new tab (highlighted with a red arrow), Open in new window, Save target as..., Print target, Cut, Copy, Copy shortcut, Paste, E-mail with Windows Live, Translate with Bing, All Accelerators, Add to favorites..., and Properties. The background shows the 'Buyer Material Status' page with various filters and a table of material data.

“2 instances” of “Ultriva” are now opened. Click on each instance to move back and forth.

The screenshot shows the Internet Explorer browser with two instances of the Ultriva 7.5 application open. The first instance is in the foreground, showing the 'Buyer Material Status' page. The second instance is in a new tab, also showing the 'Buyer Material Status' page. Red arrows point to the 'Ultriva 7.5' tabs in the browser's tab bar. The background shows the 'Buyer Material Status' page with various filters and a table of material data.

Search for your Version of Ultriva



Quick Tip – Knowing what version you are on will dictate the functionality in Ultriva. Each new release is documented with all of the changes and can be found on the Ultriva Help Portal.

Optional: Click on the link below to navigate to the Ultriva Help Portal

<http://help.ultrivalms.com/>

Click on “Applications” on the lower right hand side of the screen.

Ultriva 7.5

Admin | My Account | Help | Logout

Home **Material Status** Actions Scan Reports Integration

Laura Maki | TBJ

Material Status

Print Export Favorites

Buyer Material Status

Issue tracking: All Items Show: All Items X RYG: All Product Line: All

Supplier: Item starts with: Category: All Commodity Code: All

Go

37.9% 56.3% 6.8%

Red Yellow Green

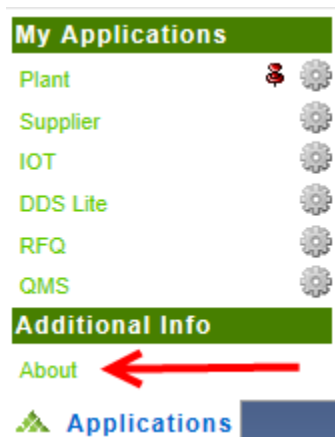
Add Edit Disable View Details

RYG	Item	Units on hand	Daily usage last 15 days	Daily usage last 90 days	Days of material on hand	Next delivery	Units expected	Projected stock-out	Past due orders	On Hand Trend
	24689	0	120	103.3333	0	-	0			
	41410-010P9-00	0	0	0	0	02/13/2013	100.1234			
	41410-030K7-00	0	1,354.6667	225.7778	0	08/15/2013	16,256			
	41410-030M5-B1	0	33.3333	5.5556	0	08/15/2013	500			
	41410-040P4-B0	0	46.6667	7.7778	0	08/15/2013	700			
	41410-110P2-E0	0	66.6667	11.1111	0	08/15/2013	800			
	41410-120M5-B1	0	33.3333	5.5556	0	08/15/2013	500			
	41410-140P4-B1	0	46.6667	7.7778	0	08/15/2013	700			

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Applications

Click on “About”.



The “Ultriva Application” information is below.

ULTRIVA DRIVING LEAN PERFORMANCE **Ultriva 7.5** Admin | My Account | Help | Logout

Home Material Status Actions Scan Reports Integration Laura Maki | TBJ

Material Status Admin Print Export Favorites

About Ultriva Applications

How do I?

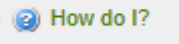
Ultriva © Business Objects Version 7.6 Built On 2013-06-12 17:42:01
Ultriva © Lean Suite 7.6 Built On 2013-06-12 17:45:16
Key: EK00K5200500P1SZWZX0X10F147C002

Applications:	Features:	Licenses:
Plant	Scheduling	1 Plant License
Supplier	Operations/OEE	Unlimited Supplier License
Inventory Optimization Tool	Internal Kanban	Unlimited Workcenter License
DDS Lite	Supplier Kanban	
Request For Quotation	SBR	
Quality Management	Plant	

Field Name ▲	Field Value ▼
about info	Ultriva © Business Objects Version 7.6 Built On 2013-06-12 17:42:01
application license	TBDemo
busunit id	BSU22ZACNAF4
busunit type	PLANT
caller time	2013-08-28 08:31:14
caller timezone	(GMT-06:00) Central Time (US & Canada)
login name	maki

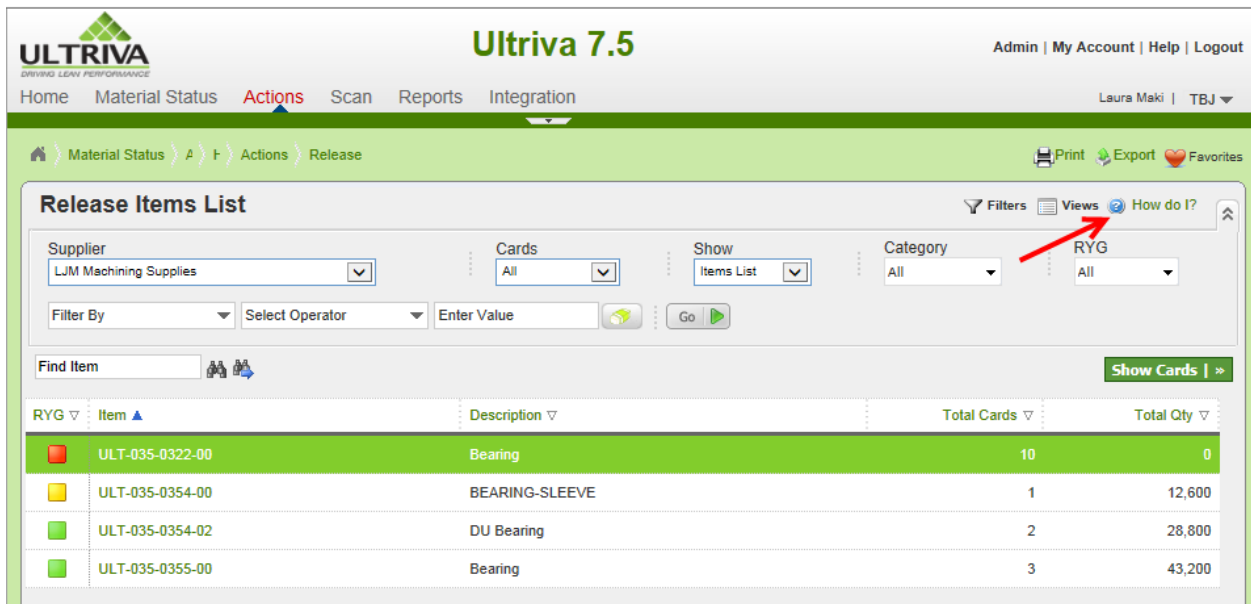
How Do I?



Quick Tip – To answer questions on how to perform an action on a screen, click on the How Do I? icon  for more detailed instructions.

Click on “How Do I?”

This example: Release Items” screen



The screenshot shows the Ultriva 7.5 interface. The top navigation bar includes 'Home', 'Material Status', 'Actions', 'Scan', 'Reports', and 'Integration'. The 'Actions' tab is selected. The main content area is titled 'Release Items List'. It features a search bar with 'Find Item' and a 'Show Cards' button. Below the search bar is a table with columns: RYG, Item, Description, Total Cards, and Total Qty. The table contains four rows of data. A red arrow points to the 'How do I?' icon in the top right corner of the table area.

RYG	Item	Description	Total Cards	Total Qty
	ULT-035-0322-00	Bearing	10	0
	ULT-035-0354-00	BEARING-SLEEVE	1	12,600
	ULT-035-0354-02	DU Bearing	2	28,800
	ULT-035-0355-00	Bearing	3	43,200

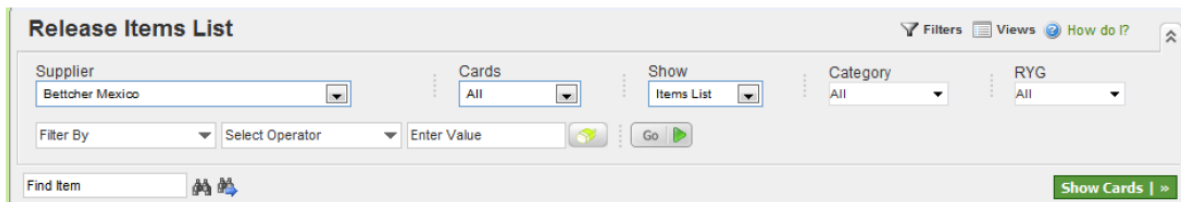
The steps to perform the actions appear

Release ←

Purpose:

↓
This action represents release of the signal for replenishment of Kanban. This action is performed via a scan of the barcode on the Kanban label or manually through a screen.

This action is performed as a result of a consumption of a lot size (box or pallet or roll) of materials. The release signal can be triggered when the first piece is consumed or when the last piece is consumed depending on the business process.



The screenshot shows the Ultriva 7.5 interface. The top navigation bar includes 'Home', 'Material Status', 'Actions', 'Scan', 'Reports', and 'Integration'. The 'Actions' tab is selected. The main content area is titled 'Release Items List'. It features a search bar with 'Find Item' and a 'Show Cards' button. Below the search bar is a table with columns: RYG, Item, Description, Total Cards, and Total Qty. The table contains four rows of data. A red arrow points to the 'Release' button in the top right corner of the table area.

RYG	Item	Description	Total Cards	Total Qty
	ULT-035-0322-00	Bearing	10	0
	ULT-035-0354-00	BEARING-SLEEVE	1	12,600
	ULT-035-0354-02	DU Bearing	2	28,800
	ULT-035-0355-00	Bearing	3	43,200