upland Ultriva

Ultriva 8.0 and Above Disable an Item Reference Guide

Table of Contents

(Click to follow link)

Buyer Queue – Checking the State of the Cards	. 2
Recall a Card(s)	. 6
Disable an Item	. 9

Buyer Queue - Checking the State of the Cards

Important – All cards must be On Hand in order to "Disable an Item". To check the state of the card(s), navigate to the Buyer Queue.

To navigate to the "Buyer Queue", select the "Plant or Workcenter"

≡	upland Ultriva	Ultriva Demo	🖌 🔍 🗘 🕐 🕐 🕕 ultriva user 🕶
Â	Buyer Home 🗸	Business Unit: Plant One	✓ Application: Application (Plant) ✓ ▼ ☑
	Inventory Health (Items, Stock Out Dick)	Plant	mandations
~	inventory realth (terns - stock out tisk)	Ellanef Manufacturi	ing includious
		You have no new alerts Finished Goods Wa	rehouse
<u>~</u>	370 88 541	Global Manufacturi	ng Firm
100.001	Items Items Items	Plant One	4 0 0
	High Medium Low	Ram Jack	Expedite Cancel
ĩí		Workcenter	
	Order Tracking	3PL	
ţ)		Aisin Assembly Line	1
-		Aisin Pain line	MONTHLY
	13 692 3396 846	BAWA	- Receive Goods
مالم			Create Spike Order Analyze Material Status

Click on "Actions".

≡	upland Ultriva	Ultriva Demo	🔍 💛 🕐 🚺 ultriva user 🔻
â	Buyer Home 🗸	Business Unit: Plant One	✓ Application: Application (Plant) ▼ ▼ №
	Inventory Health (Items - Stock Out Risk)	Alerts	MRP Order Recommendations
		You have no new alerts	
2=	370 88 541		0 0 0
Actions	High Medium Low		Defer Expedite Cancel
iii			
r)	Order Tracking		My Routines
-			DAILY MONTHLY
⊞	13 692 3396 846		Release Orders Receive Goods
ŝ	Orders Orders Not yet Orders past Orders past due		Create Spike Order Analyze Material Status Approve Virtual Kanban View Receipts Due

Click on "Buyer Queue"

≡	upland Ultriva	Ultriva Demo	🔍 🖤 🕐 🕕 ultriva user 🕶
Â	Admin > N Home > Actions	Business Unit: Plant One	✓ Application: Application (Plant) ▼
	Actions		0
	Approve	Adjust Inventory Print PO	PO Grouping
;=	dock You will see a list of Orders that are in the receiving dock and you can select the ones to approve	If ansfer inventory, You Will see a list of all of hand Orders where it can be Transferred to different location all together	PO Grouping
10:01	Put Away	Issue Inventory Containerize Shipments	Set Expiry Date
land	Deliver Orders to their respective location. You will see a list of Orders	Issue Inventory. You will see a list of all Containerize Orders on hand Orders where it can be Issued	Update expiry date for the Orders with existing expiry date
ĩ	that are waiting for delivery and you can select the ones to deliver	in small lots to a location	
-	Buyer Queue	Virtual Kanban Approve	Accounts Payable
ني: ا	Shows distribution of Order States for each Item	Approve Virtual Kanban Orders. You will see a list of all Orders waiting for Virtual	Accounts Payable
⊞		Kanban Approval and you can select the ones to approve and place the order	
			Ad hoc Receipts
ŝ			Ad hoc receipts

Click on the "**Supplier**" field and **Press** on the **spacebar** or start to **type the supplier name** and a **drop-down list** of the **suppliers will appear**. **Select** the "**Supplier**".

Mi Admin Mi Actions Buyer Queue Filter	Buyer Queue			Business Unit:	Plant One	▼ Applicatio	Application (Plant)	· P
Supplier d Temp Supplier (T-677889) Test1111- (Test-) TOD Inc (12443)	Show lect Operator	Enter Value	Category All	RYG	Product ↓ All	Line: Commo V All	odity Code:	

Click on the "Go" button.

Admin > N> H> Admin	tions 📏 Buyer Queue		Business Unit:	Plant One	Application:	Application (Plant)	*	
Buyer Queue It	ems List					TFilters 👻	8	*
Supplier	Show All Items X	Category	RYG All	Product Line:	Commodity C	ode:		
Filter By	Select Operator Ent	er Value Tx Go						

If cards have been "**Released**" and/or are "**In Process**" they **must be recalled** back to the "**On-Hand**" state **prior to disabling** the item. *Click on the link below for detailed instructions on how* to "*Recall a Card(s)*".



If cards are "**In-Transit**" you **must "Receive"** the cards **prior to disabling** the item. *The normal Ultriva Receive process should be followed.*



If the cards are all On Hand, click on the link below to navigate to the detailed instructions on how to "Disable an Item".



Buyer Q	ueue lter	ns List														T Filt	ers 👻 🔒 Print (Export 2	€ *
Supplier All Suppliers	×	2	Show All Items X	¢		Ca	tegory	ry RYG				Product Line: Commodity Code: Image: All the second seco							
Filter By	-	Select Ope	rator	▼E	nter Value		Tx	Go											
Sorted by: Item																Viewin	ng 11 to 20 of 632 🖣 Pa	ge 2 🔻	of 64 🕨
YG ↑ Item ↑	On	Hand	Relea	ised	In Pro	cess	At Ship	Hub	In Tran	sit	Received A	At Dock	On Hand Suppli	d At er	Other	s	Description		Tota Orders
	Orders	Qty	Orders	Qty	Orders	Qty	Orders	Qty	Orders	Qty	Orders	Qty	Orders	Qty	Orders	Qty			
0080960	2 21	2,838	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0	PRZEGUB AC2600		2
0081055	4 8	1,261	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0	PRZEGUB AC 2300		
0125 004	200 1	1,000	2	2,000	0	0	31	31,000	0	0	0	0	0	0	0	0.0	Emerson Test		5

Recall a Card(s)

To navigate to "Recall", select the "Plant or Workcenter"



Click on "Actions"

≡	upland Ultriva	Ultriva Demo	🔍 🖤 🕐 🌔 ultriva user 🔻
Â	Buyer Home 🗸	Business Unit: Plant One	✓ Application: Application (Plant) ✓ ▼ ☑
~	Inventory Health (Items - Stock Out Risk)	Alerts	MRP Order Recommendations
		You have no new alerts	
	37088541ItemsItemsItems		0 0 0
Actions	High Medium Low		Defer Expedite Cancel
11			
ţ.	Order Tracking		My Routines
-			DAILY MONTHLY
⊞	13 692 3396 846		Release Orders Receive Goods
<u>نې</u>	Orders Orders Not yet Orders past Orders past due due		Create Spike Order Analyze Material Status Approve Virtual Kanban View Receipts Due

Click on "Recall"



Click in the drop down arrow in the "Supplier" field and a drop down list appears of the available suppliers. Select the "Supplier". Click on the "Go" button.

L	Admin > N> H> N> E> Actions > Recall		Business Unit:	Plant One	Application:	Application (Plant)	•	
L	Recall Items List 🝸			▼ Filters ▼		🔒 Print 🛛 🔀 Export	*	
	Supplier Orders	Show Items List	Category	▼ RYG	·			
	Filter By	Tx	Go →					

Click on the part number to advance to the next screen or click on the line item to highlight the line. If the line was highlighted, click on the "Show Cards/Orders" button.

n >	Admin > I> F> I> E>	Actions > Recall				Business	Unit:	Plant One		 Application: 	Applicat	tion (Plant)		
Re	call Items List 🔻								▼ Filters 👻	👁 Views 👻	🔒 Print	🕑 Ехро	rt 🕜) ≈
Supp Te	plier mp Supplier (T-677889) 🗙	Orde All	ers	Show Ltems	s List	✓ Category All		₹ I	YG All	•				
Filte	er By 🔻 Se	elect Operator	▼ Enter Value		Tx Go									
Find Ite	em 🦓 i	<u>M</u>									-		🗷 Show (Orders
Sorted	i by: Item												1 to	4 of 4
RYG ↑	Item 1				Description 1						Tot	tal Qty 🏌	Total	Orders
	ULT-001-0525-00				Quest Main Bear	ring						320		
	ULT-003-0815-00				Top Bearing Plat	e						4,500		
	ULT-003-0815-01				Top Bearing Plat	e						6,000		
	ULT-005-0849-00				Top Cover							864		
													Show (Orders
														shacis

Click in selection box at the column heading to select all cards. Click on the "Recall" button.

Recal	min > N II Ord	ers List T				Business Unit:	Plant One	 ▼ Application: ♥ Views ▼ 	Application (Plant)	* t (?)
Find Order I	D	ø4 ø4				\rightarrow	🗈 Recall 🔲 Attach	Notes 🔒 Print	+ Back To Items	≓ Change Filter
Sorted by:	ltem, Or	der ID						Viewing 1	to 10 of 12 🖣 Page	1 • of 2 •
		Order ID 1	Item 1	Supplier Name 🍈	PO # 1	Order State 🍈	Release Date	Accept Date 1	Reqd Ship 1	Order Qty
	~	KCDA7V9CNAYV	10032858	ManUFact		Released	05/11/2016	-	05/16/2016	175
	 Image: A second s	KCDA7VACNAXA	10032858	ManUFact		Released	05/11/2016	-	05/16/2016	175
	~	KCDA7VBCNA48	10032858	ManUFact		Released	05/11/2016	-	05/16/2016	175
	✓	KCDA7VCCNAT5	10032858	ManUFact		Released	05/11/2016		05/16/2016	175
	✓	KCDA7VDCNAWU	10032858	ManUFact		Released	05/11/2016	•	05/16/2016	175
	✓	KCDA7VECNA9Z	10032858	ManUFact		Released	05/11/2016	•	05/16/2016	175
	~	KCDA7VFCNASK	10032858	ManUFact		Released	05/11/2016		05/16/2016	175
	✓	KCDA7VGCNA5N	10032858	ManUFact		Released	05/11/2016	-	05/16/2016	175
	Z	KCDA7VHCNA34	10032858	ManUFact		Released	05/11/2016	-	05/16/2016	175
	~	KCDA7VJCNA7B	10032858	ManUFact		Released	05/11/2016	-	05/16/2016	143

The cards have been "Recalled Successfully".

A dm Recal	nin > N> F> N> E> Acti I Orders Results	ions 📏 Recall					Business	Unit:	Plant One	٣	Application:	Application (I	Plant) Export	• •
Following (Orders were successful	+								T	•	Back To Items	← Back	To Orders
	Order ID	Item	PO #	PO Line #	Release #	Release Line #	Order Qty De	escriptio	n					
	KCDA7V9CNAYV	10032858		0			175 Or	der Suco	cessfully Recalled.	Please adjust the	e Purchase Order	r if necessary.		
	KCDA7VACNAXA	10032858		0			175 Order Successfully Recalled. Please adjust the Purchase Order if necessary.							
	KCDA7VBCNA48	10032858		0			175 Or	der Suco	cessfully Recalled.	Please adjust the	e Purchase Order	if necessary.		
	KCDA7VCCNAT5	10032858		0			175 Or	der Suco	cessfully Recalled.	Please adjust the	e Purchase Order	if necessary.		
	KCDA7VDCNAWU	10032858		0			175 Or	der Suco	essfully Recalled.	Please adjust the	e Purchase Order	r if necessary.		
	KCDA7VECNA9Z	10032858		0			175 Or	der Suco	cessfully Recalled.	Please adjust the	e Purchase Order	r if necessary.		
	KCDA7VFCNASK	10032858		0			175 Or	der Suco	cessfully Recalled.	Please adjust the	e Purchase Order	r if necessary.		
	KCDA7VGCNA5N	10032858		0			175 Or	der Suco	cessfully Recalled.	Please adjust the	e Purchase Order	r if necessary.		
	KCDA7VHCNA34	10032858		0			175 Or	der Suco	cessfully Recalled.	Please adjust the	e Purchase Order	r if necessary.		
	KCDA7VJCNA7B	10032858		0			143 Or	der Suco	cessfully Recalled.	Please adjust the	e Purchase Order	if necessary.		

Important – You may need to makes adjustments in your ERP and/or the Purchase Order based on your configuration in Ultriva.

Disable an Item

To navigate to the "Disable an Item", select the "Plant or Workcenter"



Click on "Admin"

≡	upland Ultriva	Ultriva Demo	🔍 💟 🕐 🕕 ultriva user 🔻
â	Buyer Home 🗸	Business Unit: Plant One	✓ Application: Application (Plant) ✓ ▼ ☑
~	Inventory Health (Items - Stock Out Risk)	Alerts	MRP Order Recommendations
¥=	370 88 541	You have no new alerts	0 0 0
<u>100001</u>	High Medium Low		Defer Expedite Cancel
Ш			
ţ	Order Tracking		My Routines
▦	13 692 3396 846		DAILY MONTHLY Release Orders Receive Goods
Admin	Orders Orders Not yet Orders past Orders past Awaiting Acknowledged for Shipping for Receipts		Create Spike Order Analyze Material Status Approve Virtual Kanban View Receipts Due
	MRP Forecasts Gross Requirements	Integration Status (Last 7 days)	

Click on "Item"

≡	upland Ultriva	Ultriva Demo	🔍 💟 🕐 🕕 ultriva user 🕇
ŵ	Admin	Business Unit: Plant One	Application: Application (Plant)
\mathbb{M}	✓ Admin		:
¥=	User Add, manage and view users, reset	Item Add, manage and view items, assign Add, manage operator work hours Manage operator work hours	Add, manage and view Dropoff Location
<u>10001</u> [900]	passwords and update roles	utyers and associate suppliers	

Click in the Item no starts with: field and type in the "Part Number". Click on the "Go" button.



The part number appears. Click on the "Disable" button.

A > Recall > A> E	> I> I> I> Admi	n 🔰 Item			Business Unit:	Plant One	*	Application:	Applica	tion (Plant)	Ŧ
ltems List							🕇 Filters 👻	👁 Views 👻	🔒 Print	🕑 Export	? ≈
Product Line: All Supplier:	•	Show: All Items Item no. starts with:	RYG: All Category: All	•				41.0% 13.6% 45.3%		Virtual Kanban Forecast	Q
+ Add C Edit	X Disable	th View Details Gar	285 Tx ts - More Options	G0 }							
Sorted by: Item		/									1 to 1 of 1
RYG Category	Item	Description		Standard Qty	Default Supplier	Product Line	Commod	lity Code		No. of Cards	Status
Kanban	10032858	TULIP AAR 2600DLD6263	138401037	175	ManUFact	Unknown	Unknown			26	Active

Click on the "Yes" button.

ite	Recall > A> E	> <u>▶ </u>	nin 🔰 Item			Business Unit:	Plant One	▼ Applie ▼ Filters ▼ Ø Views	Application (Plant)	•
Pi Si	roduct Line: All upplier:	~	Show: All Items ✓ Item no. starts with:	RYG: All Category: All	•			13.0	41.0% Kanban Forecast	٩
Item			Vith 👻 1003285			×				
+ /	dd 🕼 Edit	× Disable	View Details E Cards	Do you rea	lly want to disable t	his item?!	_			tant) Export C Export Export C Export C Export C Export C Export Export C Export Export C Export E
Sort	ed by: Item					✓ Yes X	No		k	1 to 1 of 1
RYG	Category	Item	Description		Standard Qty	Default Supplier	Product Line	Commodity Code	No. of Cards	Status
	Kanban	10032858	TULIP AAR 2600DLD6263138401037		175	ManUFact	Unknown	Unknown	20	6 Active

The item is now disabled and removed from the item list.

K ≥ Recall ≥ A> E> I> I> I> Admin > Item				Business Unit:	Plant One	•	Application:	on: Application (Plant)			
Arems List Product Line: All V All Lems V All All Category: Litem V Starts With V 1003285 Tk Go V Add C2 Edit X Disable V Wew Details Fie Cards - More Dations											
Product Line: All Supplier:	Show: All Items Item no. starts with: Starts With	RYG: All Category: All Tx : Go	•				41.0% 13.6% 45.4%) =	Virtual Kanban Forecast		
Add 🛛 🕼 Edit 🛛 🗙 Disabl	e View Details 🛛 🕮 Cards	✓ More Options									
	-										