

Actions

Buyer and Supplier Reference Guide

Version 7.0 April 2011

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Buyer Actions



Buyer Actions



Release

Manually release Cards that have been consumed. Depending on how the system is set up a Card will be considered consumed when the box/bin is either opened or emptied



Receive

Receive Cards as they arrive. You will see a list of Cards that are in transit and you can select the ones to receive



Buver Queue

Shows distribution of Card States for each Item



Reschedule

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



Move Location

Move Card to different location. You will see a list of all on hand Cards and you select the ones to be moved to different location



Virtual Kanban Approve

Approve Virtual Kanban Cards. You will see a list of all Cards waiting for Virtual Kanban Approval and you can select the ones to approve and place the order



Spike Orders

Manually create one time orders



Send Email For Print

View the list of acknowledged Cards. Use this screen to send an email to supplier for printing kanban label



Set PO

Set P.O. details for the Cards. You will see a list of Cards that are waiting for the P.O. details to be set and you can select the ones to set the P.O. data



Approve

Approve Cards located at the receiving dock. You will see a list of Cards that are in the receiving dock and you can select the ones to approve



Recall

If you accidentally marked a Card as consumed. You can undo that transaction here



BulkPrint

View a list of all Cards on hand. If necessary you can also reprint Card labels



Adjust Inventory

Issue or Transfer Inventory. You will see a list of all on hand Cards where it can be Issued in small lots or Transferred to different location all together



Approve Supplier Reschedule Request

Approve supplier reschedule requested Cards. You will see a list of all Cards waiting for Approval and you can select the ones to approve



CallOff

If you have blocked shipment of Cards from supplier. Use this screen to unblock the Cards.



Add Notes

Add notes to one or more Cards in cycle

Key points on documentation structure:

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

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

The screen shot shown in each "Results" is the response screen in Ultriva for the action taken

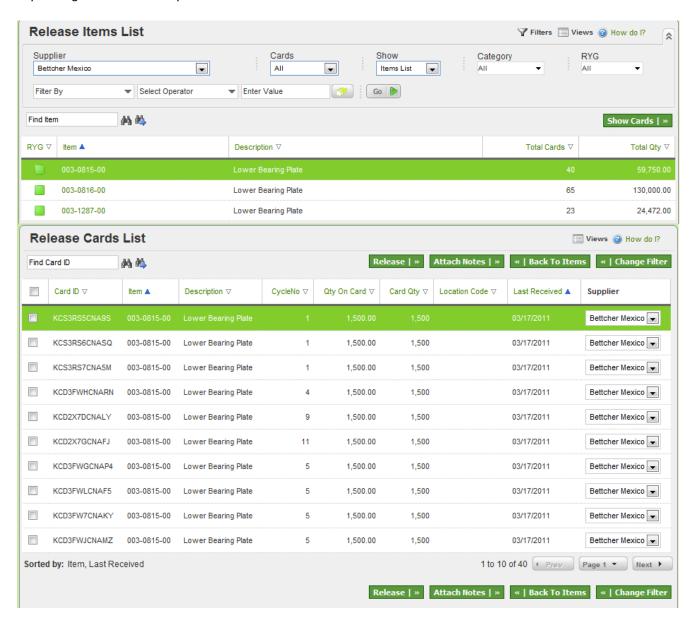
The screen shot shown in each "Exceptions" highlights the exceptions if any

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.

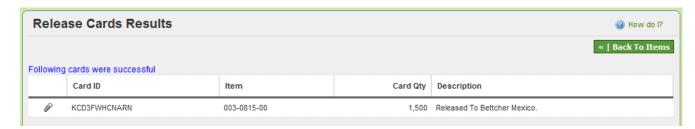
This action is performed as a result of a consumption of a lot size (box or pallet or roll) of materials. The release signal can be triggered when the first piece is consumed or when the last piece is consumed depending on the business process.



Results:

This action results in an electronic signal to the supplier of that Item. The supplier could be internal upstream work center, supermarket or a warehouse or an external supplier. If the application is

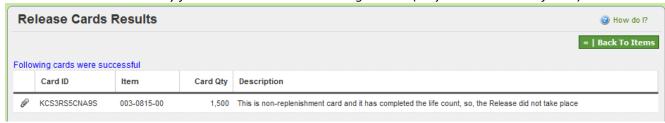
integrated with the business system (ERP or MRP), then a purchase order or work order or pick list will be generated as well.



Exceptions:

The signal will not be sent to the supplier on the following conditions:

- The released card is a spike card
- The Kanban loop has been resized and there are cards waiting to be deleted
- The card is already released (only in the instance of a duplicate scan)
- The card is not ready for release as it is not in the right state (only in the instance of scan)



Set P.O

Purpose:

The purpose of this action is one of the following:

- 1. The integration failed in creating a P.O and the user has to manually enter P.O. # for the release
- 2. The application is not integrated with the business system but the user wants to input a P.O. # for the release

Result:

Both the actions listed above will result in supplier getting the P.O for replenishing the signal

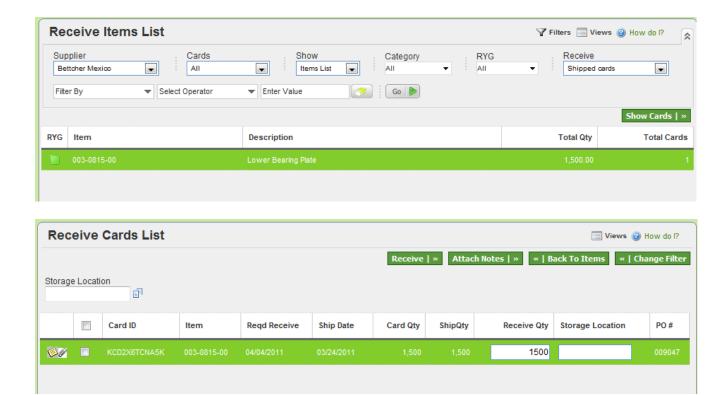
Exceptions:

None.

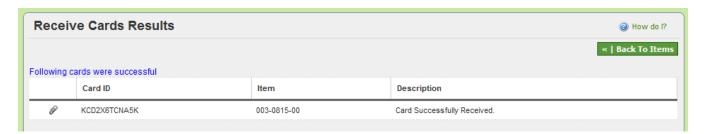
Receive

Purpose:

This action represents receiving of goods from the supplying location. This action is performed via a scan of the barcode on the Kanban label or manually through a screen.

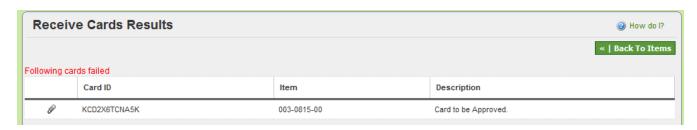


This action results in the receipt of goods at the receiving dock. This will move the card to on-hand state indicating that it is ready for consumption. If the application is integrated with the business system (ERP or MRP), then this action will generate a purchase order receipt or work order close transactions.



Exceptions:

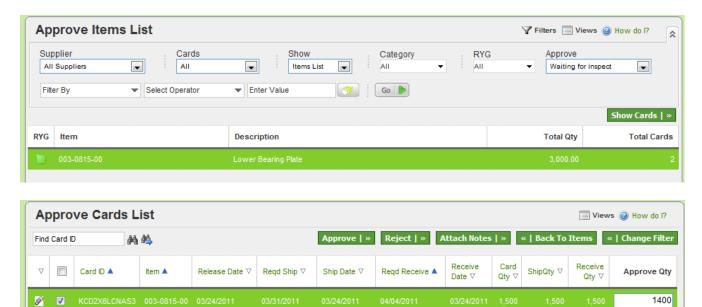
If the part that is being received is set to wait at the dock either for inspection or put away then the card is not moved to on hand but retained at an intermediary state called waiting at dock. The integration process is also put on hold. If the card is scanned again for receipt then it will fail. No duplicate transactions will be created



Approve

Purpose:

This action is required only for the part that is set to wait at the dock. The purpose of this action is to approve inspection or complete put away.



Results:

KCD2X6TCNA5K 003-0815-00 03/24/2011

If the item is waiting for inspection then the user can approve the lot in full or partial quantities. The card will then be moved to the on-hand state only for the approved quantity.

03/24/2011

04/04/2011

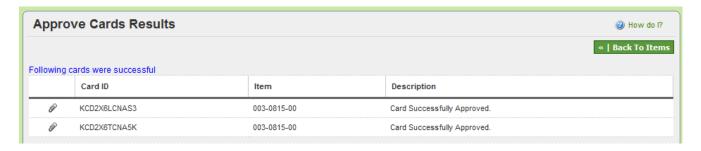
03/30/2011 1,500

1,500

1,500

1500

03/31/2011



Exception:

The user can fully reject the entire lot, in which case the card is moved back to supplying location



Buyer Queue

Purpose:

This is largely overview screen with an option to filter and perform actions depending on the user role. The actions that can be performed are Release, Receive and Approve.

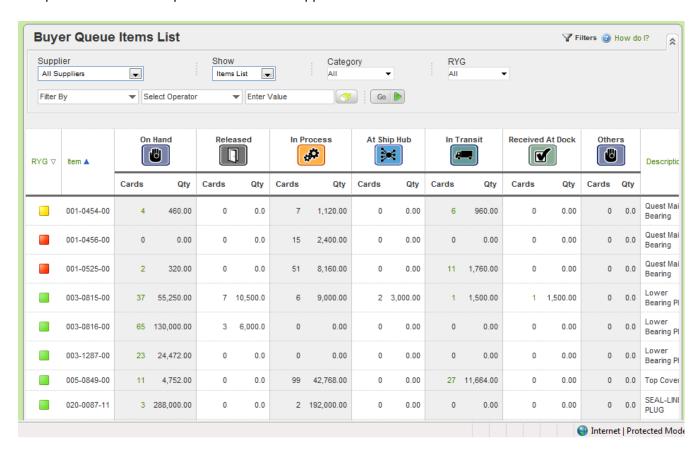
This action is primarily for visibility only.

Results:

The results defined for the respective actions will happen

Exceptions:

Exceptions defined for respective actions will happen

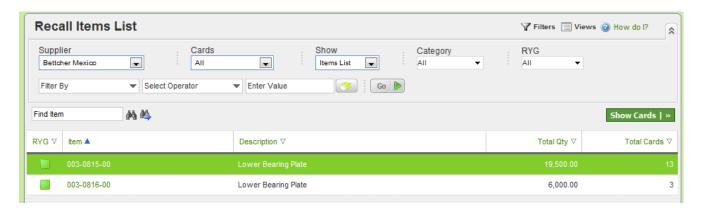


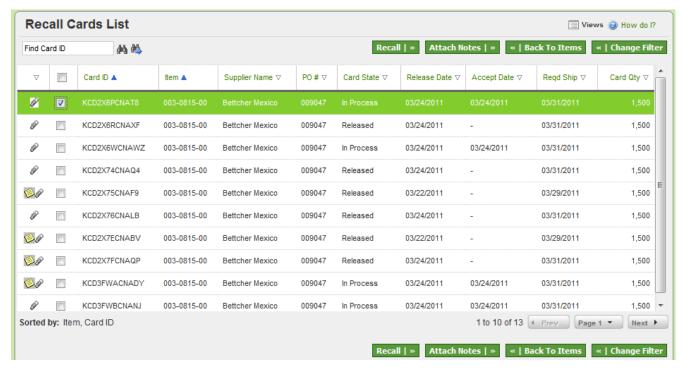
Recall

Purpose:

This action allows the user to recall a signal that was released. Recall could be for several reasons but the primary ones are:

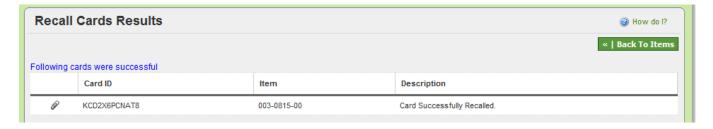
- The release was done in an error
- The demand has gone down
- Change of supplier



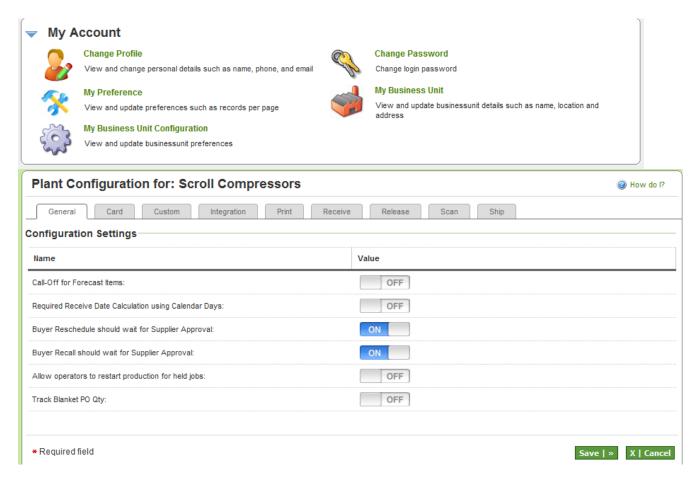


Results:

This action results in the card being put back in on-hand state with whatever quantity it had before its release.



CONFIGURATION SETTINGS AT "MY BUSINESS UNIT CONFIGURATION" WILL DETERMINE WHETHER THIS REQUIRES SUPPLIER APPROVAL OR NOT.



Exception:

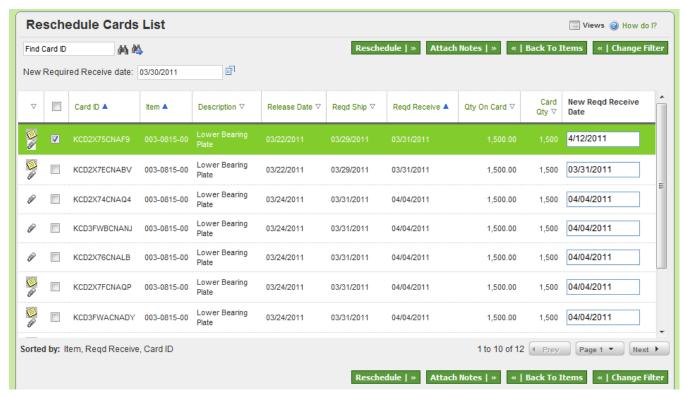
The card cannot be recalled if it is already accepted by the supplier

Reschedule

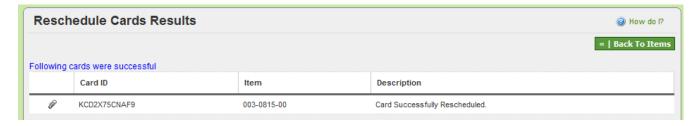
Purpose:

This action allows the buyer to reschedule an order. Buyer initiates the reschedule by requesting a date change. The Supplier then approves or rejects the date change depending on the configuration.

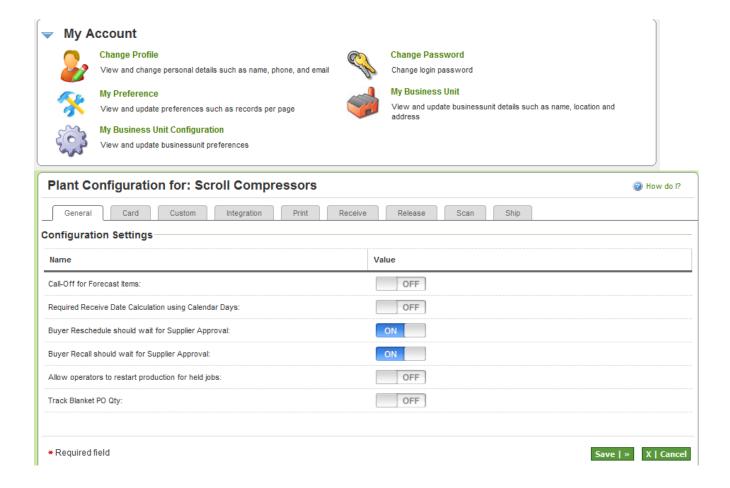




This moves the card to a waiting for approval state and notifies the buyer to approve.



CONFIGURATION SETTINGS AT "MY BUSINESS UNIT CONFIGURATION" WILL DETERMINE WHETHER THIS REQUIRES SUPPLIER APPROVAL OR NOT.



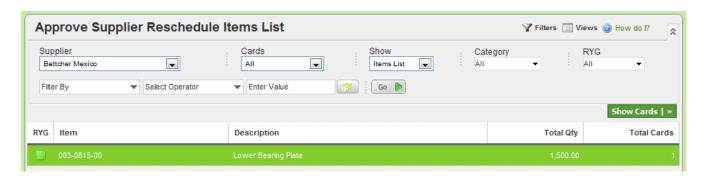
Exception:

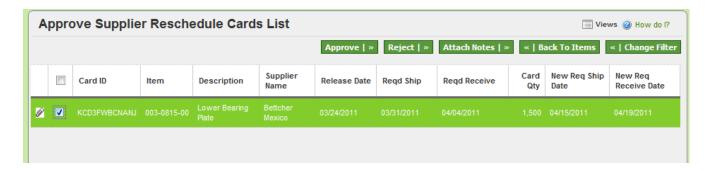
If the buyer fails to approve or reject then the order remains in an intermediary state that could result in a stock out for the customer.

Approve Supplier Reschedule request

Purpose:

This action is required only if the supplier requests a reschedule. The change request will be for a date change only. Buyer will have an option to approve or reject the request.



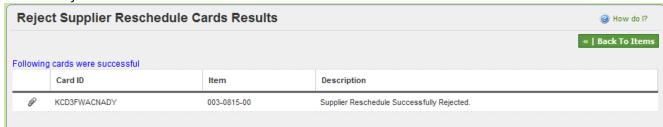


If the buyer approves then change then the system will update the Required Ship date to the newly approved one. If the buyer rejects the change request then the old required ship date is maintained and the card is moved back to in Process state ready for shipment.



Exception:

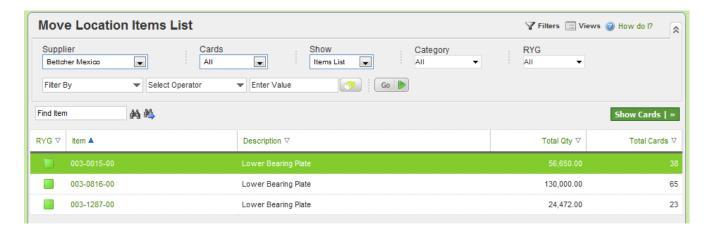
If the buyer fails to approve or reject then the order remains in an intermediary state that could result in a stock out for the customer.

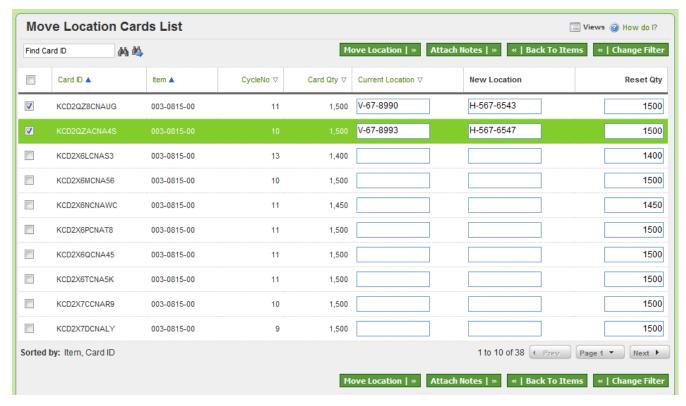


Move Location:

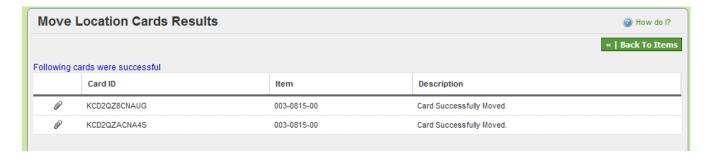
Purpose:

The purpose of this action is to allow factory floor to move lots from one location to another while keeping track of the movement in the application. The system keeps track of the most current location where the material is. This can be done only for the goods which are in on-hand state.





Every time the goods are moved the current location overwrites the previous location.



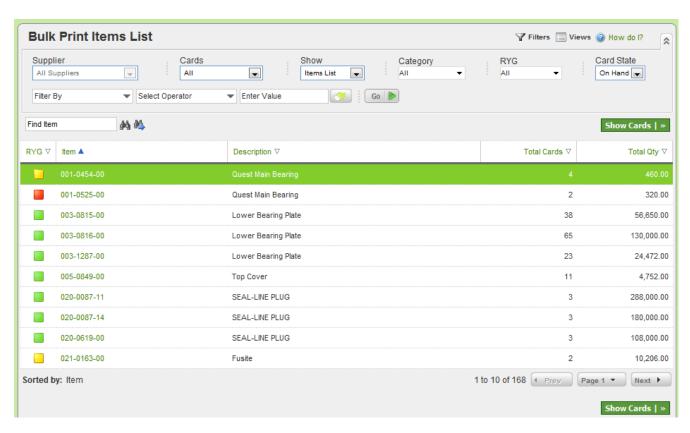
Exceptions:

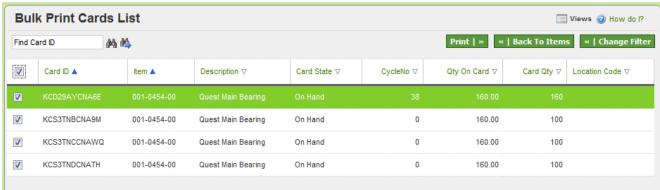
None

Bulk Print

Purpose:

This action is normally required at the time of set up.

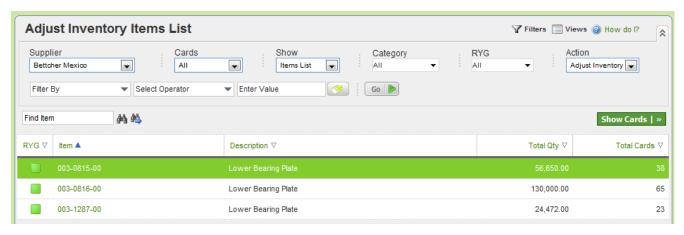


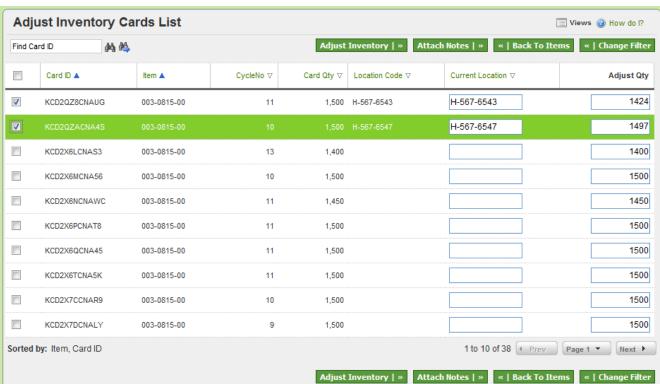


Adjust Inventory

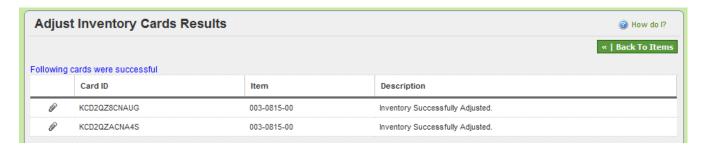
Purpose:

The purpose is to sync up the inventory in the system with MRP or ERP inventory. Any action that is performed outside of the Ultriva applications (like Scrapping of material at the point of use or rejection of parts after the inspection or damage of goods on the floor etc,). This is done manually through screen inputs.





The on hand inventory in the system is adjusted by decrementing or incrementing quantities at the card level.



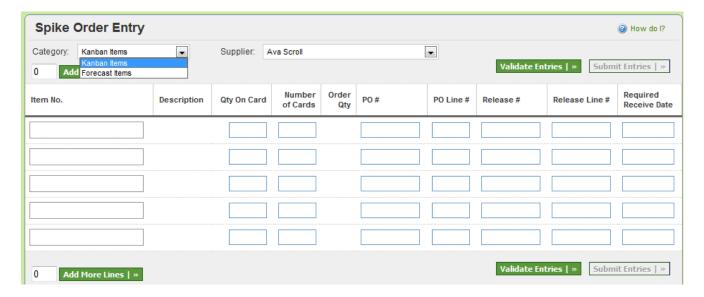
Exceptions:

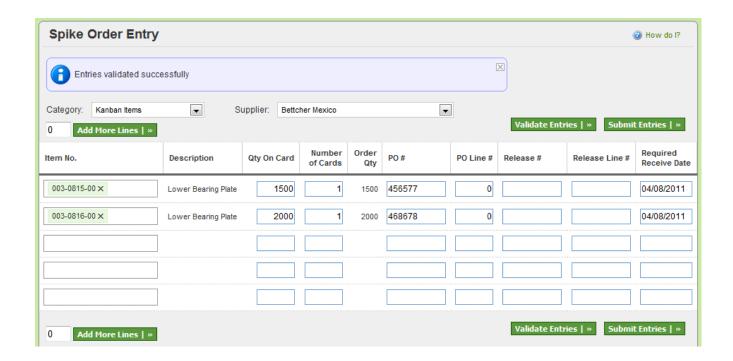
None

Spike orders

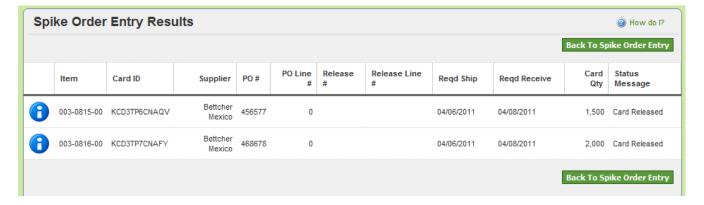
Purpose:

The purpose of this action is to allow the users to react to temporary increase in demand without resizing the Kanban loop. This generates a one cycle release signal to the supplier. Unlike a standard Kanban signal, this signal is destroyed when it is released again.





Identical to the release action details mentioned above.



Exception:

Identical to the release action details mentioned above. In addition while releasing spike orders the required ship date can be changed. It does not have to match to the standard lead time set in the system.

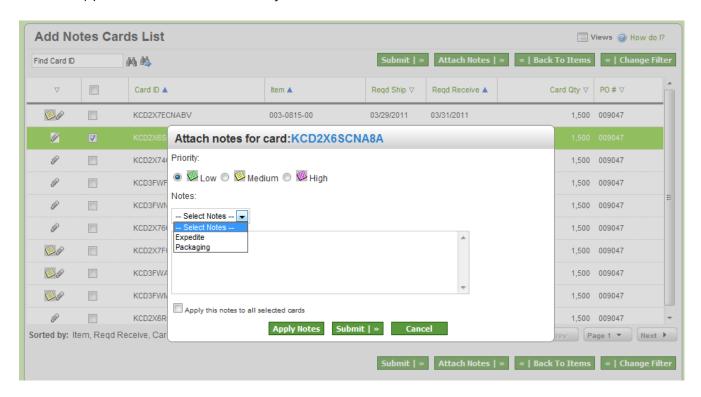
Add Notes

Purpose:

The purpose of this action is for buyers to generate some notes to suppliers on the cards (orders). Buyers can filter the cards by where they are in the cycle (released, accepted shipped, received etc.)

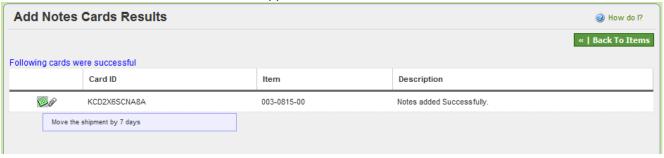


Select card(s) and click attach notes. Select from list and click Submit.



Results:

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



Supplier Actions



Supplier Actions



Accept

View and acknowledge new kanban orders



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



Docall

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



Production Sequence

View list of orders to complete production. Use this screen to complete production for the pending orders.



Print Duplicate Cards

View the list of printed kanban Cards. Use this screen if you want to print duplicate labels



Set WorkOrder No.

View the list of acknowledged kanban Cards. Use this screen to update the workorder number for the acknowledged Cards



Master Label

Create master label for shipment



Ship

View the list of acknowledged kanban Cards. Use this screen to indicate the Cards you are shipping. If you have not printed kKanban labels already, you can do that here too



Supplier Queue

Shows distribution of Card States for each Item



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



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 Tracking No.

View the list of shipped kanban Cards. Use this screen to update the tracking number for the shipped Cards.



Resequence Production Orders

View list of orders to complete production. Use this screen to resequence the orders for production



Add Notes

Add notes to one or more Cards in cycle

Key points on documentation structure:

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

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

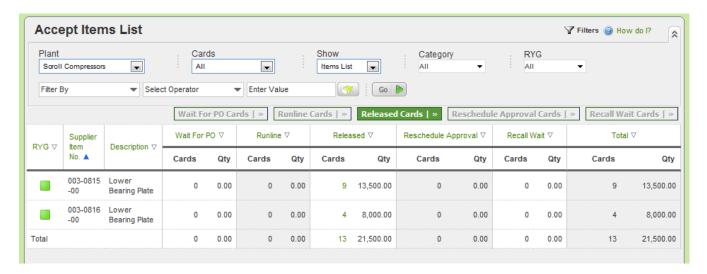
The screen shot shown in each "Results" is the response screen in Ultriva for the action taken

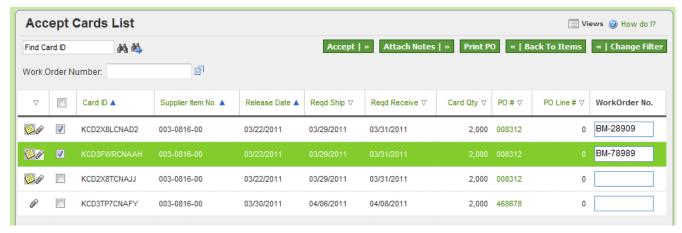
The screen shot shown in each "Exceptions" highlights the exceptions if any

Accept

Purpose:

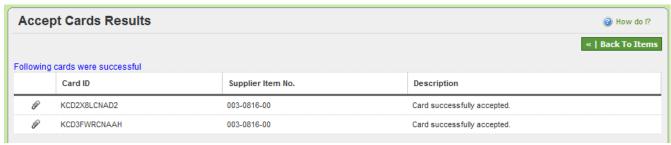
This action allows the supplier to accept the Kanban signal and/or Purchase order. Supplier will be able to view the P.O. prior to accepting the order. Supplier can also attach notes while accepting the order.



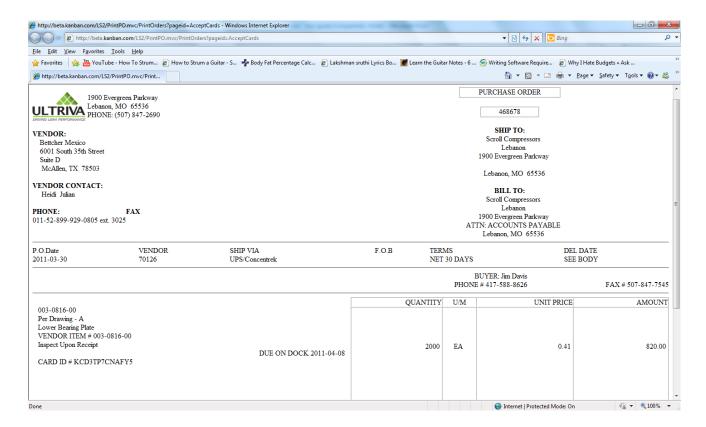


Results:

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



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



Exception:

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

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

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

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

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

Ship

Purpose:

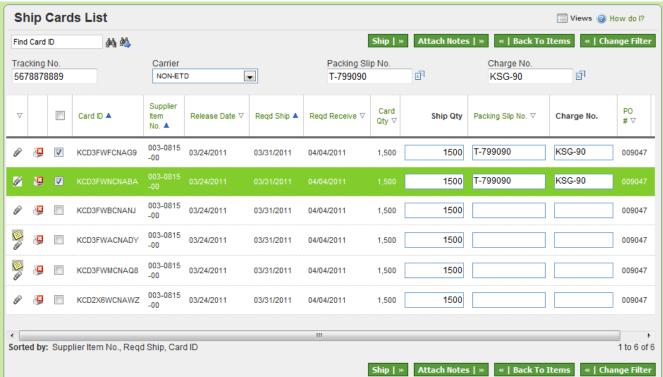
This action allows the suppliers to ship goods when they are ready. Only orders that are accepted by the suppliers will be allowed to ship. The supplier can ship one or multiple orders. The following data can be entered while shipping:

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

- Attach notes or certificates if necessary

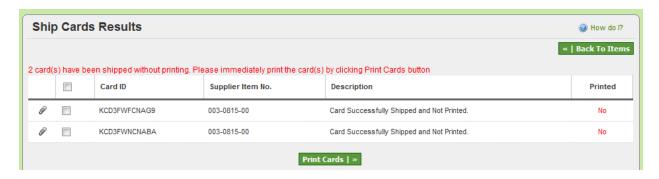
After successful shipment, they can print the shipping label as well





Results:

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



Exception:

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

Consolidator ship

Purpose:

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

Results:

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

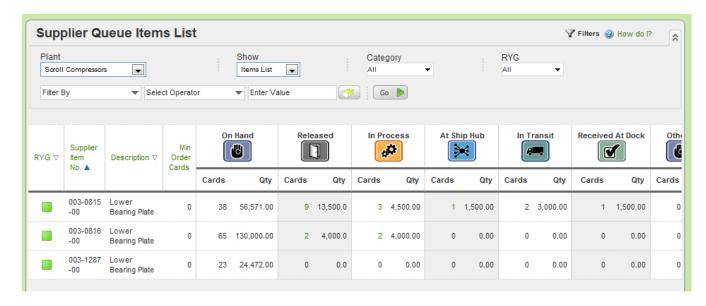
Exception:

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

Supplier Queue

Purpose:

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



None

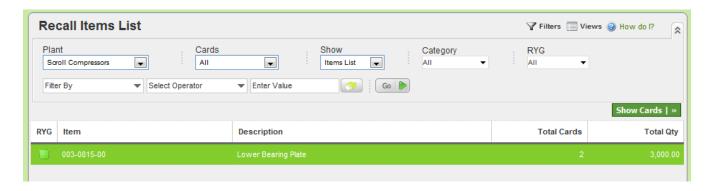
Exception:

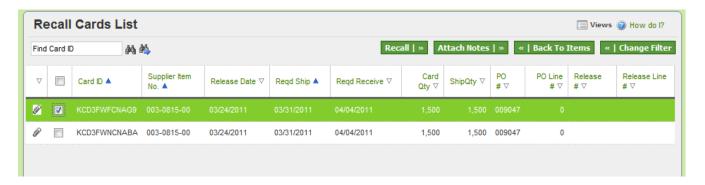
None

Recall

Purpose:

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





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



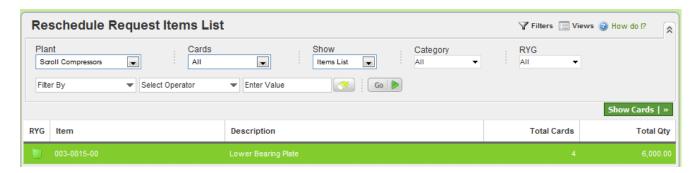
Exception:

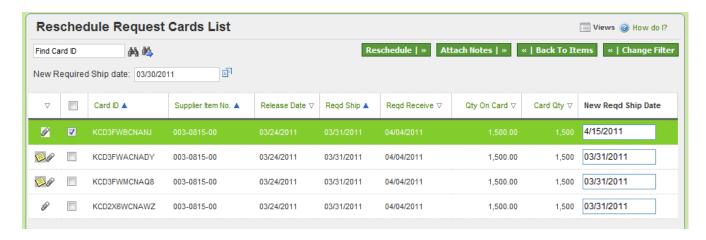
If the card is already received, it cannot be recalled.

Reschedule Request

Purpose:

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





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



Exception:

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

Production Sequence

Purpose:

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

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

REFER TO LFM USER GUIDE FOR DETAILS

Results:

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

Exception:

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

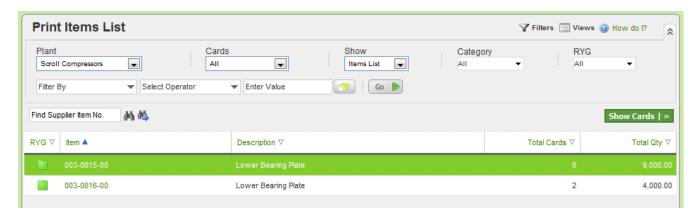
Print Cards

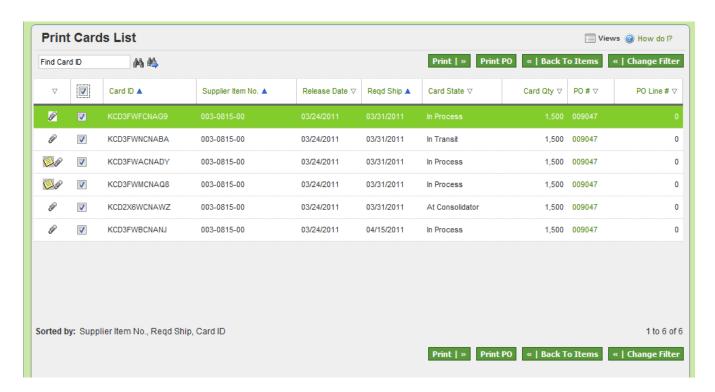
Purpose:

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

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

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





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

Exception:

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

Print Duplicate Cards

Purpose:

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

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

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

Results:

Prints the label but puts duplicate on it.

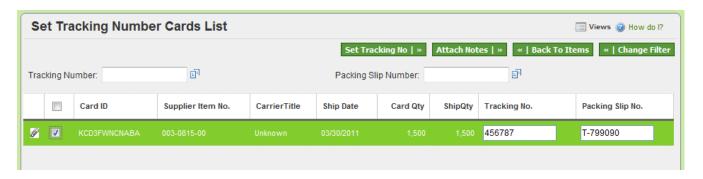
Exception:

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

Set Tracking No.

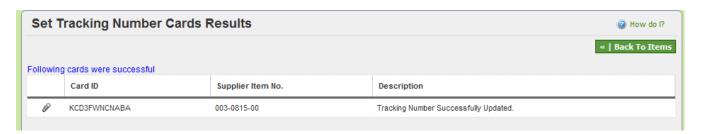
Purpose:

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



Results:

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



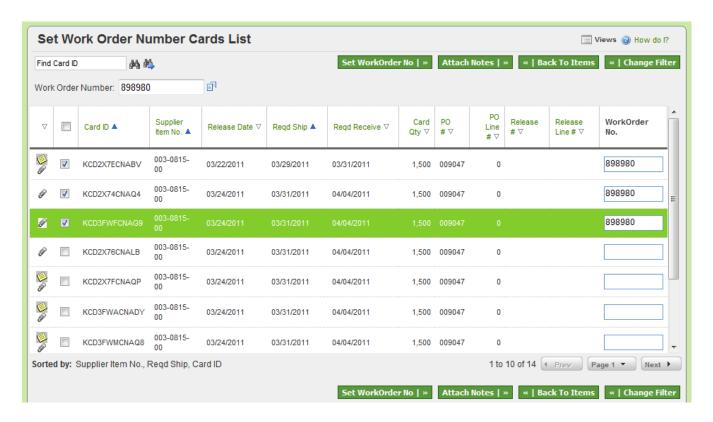
Exception:

None

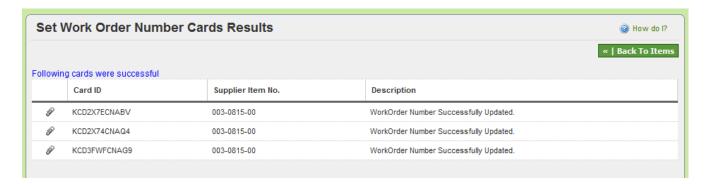
Set Work Order Number

Purpose:

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



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



Exception:

None

Re-sequence production orders

Purpose:

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

REFER TO LFM USER GUIDE FOR DETAILS

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

Exception:

Refer to LFM user guide

Master Label

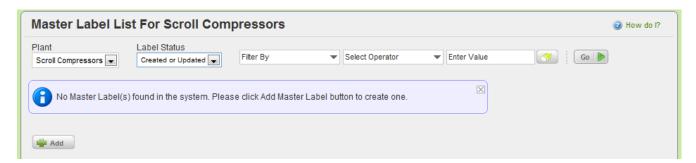
Purpose:

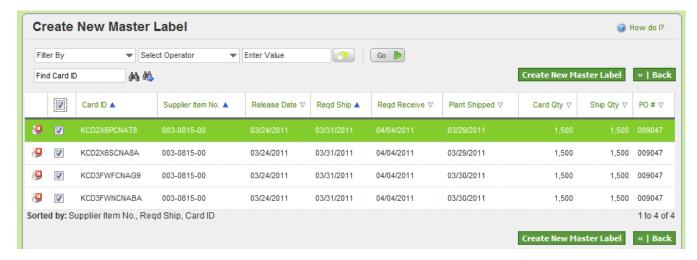
The purpose of a Master Label is to print a consolidated label across multiple orders. Some common uses are:

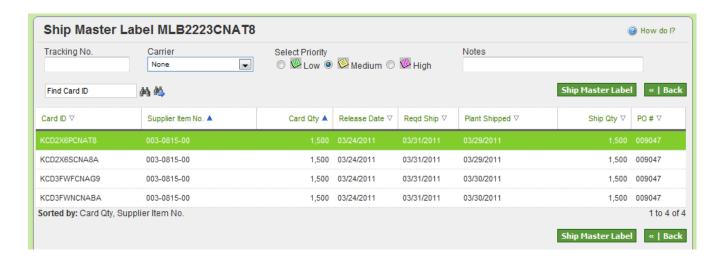
- Customer orders in boxes while the supplier ships in a lot of 30 boxes.
- Supplier shrink wraps a pallet consisting of different part numbers for LTL carrier
- Supplier ships a truck load of parts to the customer

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

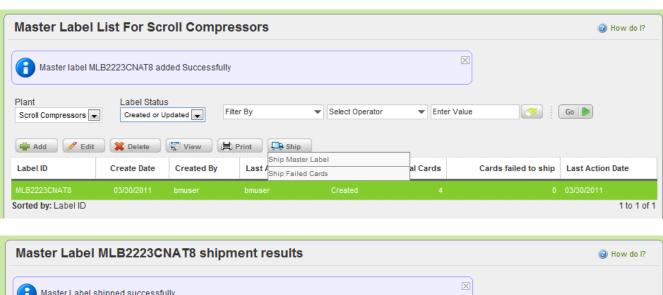
- 30 boxes
- 1 pallet of different product mix
- Entire truck load of goods

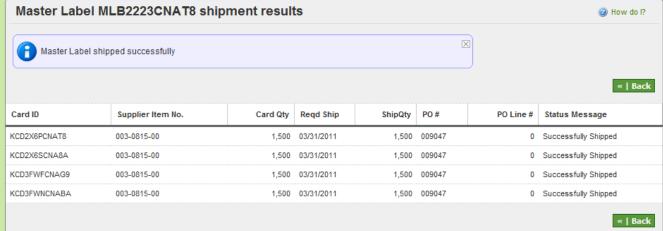






Master label will be created and printed





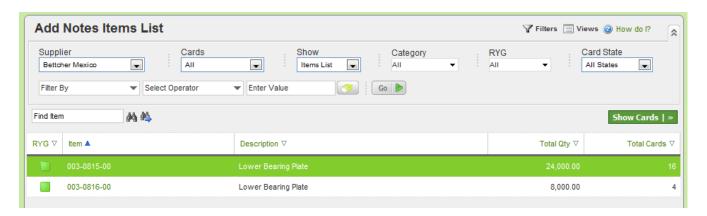
Exception:

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

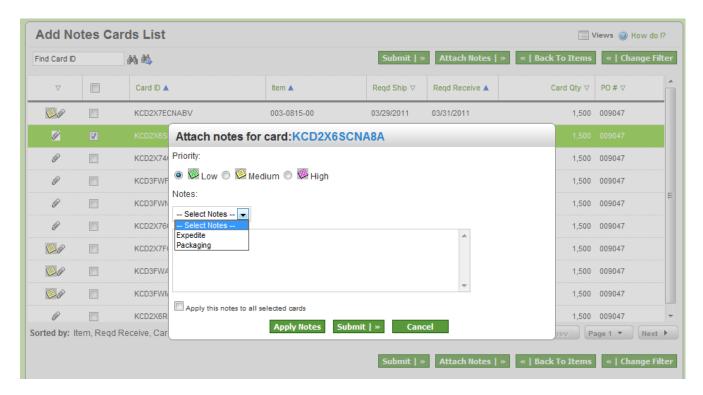
Add Notes

Purpose:

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



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



Results:

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

