



Product Release Notes

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# Ultriva 7.6 Release Notes

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Version 1.0


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## Revisions

Date	Modifications	Author	Comments
10/29/2013	Created	Pushparaj S	
01/18/2014	Added P3 notes	Pushparaj S	Check sections 2(enhancements) and 3(bug fixes).
02/06/2014	Added P4 notes	Pushparaj S	Check sections 2(enhancements) and 3(bug fixes).
03/26/2014	Added P7 notes	Pushparaj S	Check sections 2(enhancements) and 3(bug fixes).
05/23/2014	Added P8 notes	Pushparaj S	Check sections 2(enhancements) and 3(bug fixes).

## Symbol Legend

Symbol	Description	Location
	You wanted this feature!!!	Margin

# 1 Ultriva 7.6 Release Notes

This new release contains enhancements and bug fixes as listed below

1. Update ERP receipt number and packing slip number for completed cycles
2. Kanban board tool tip to four column view
3. Supplier User to switch to other supplier Business units
4. Master Label for Customer Module
5. Print Bill of Lading based on Master Label
6. Production Sequence Enhancements
7. ERP/MRP Open PO Sync
8. Print PO for supplier based on ERP/MRP open PO sync data
9. Selection for dismissing alerts
10. Alerts Export with Alert Message
11. Rule Wizard – Fields selection sorted alphabetically
12. Auto Resize Wizard – Value recalculation

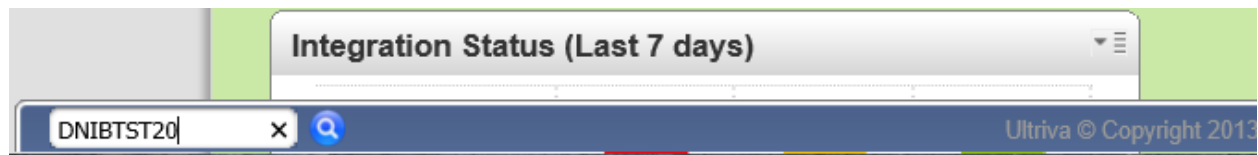
## 1.1 Update ERP Receipt Number and Packing Slip Number for Completed Cycles



*You wanted this feature. This enhancement is an idea from a customer.*

This option allows users to update the ERP receipt number or packing slip number in Ultriva to match with the MRP/ERP. For various reasons our customers would like to update the Receipt number or packing slip number for completed cycle in Ultriva to match with ERP systems. This functionality let admin users to do the correction themselves.

To update the info, search by the incorrect packing slip number or card id or purchase order number



Search results for DNIBTST20

How do I

Item (1 results found)

Card (2 results found)

Card ID	Card State	Cycle No	Card Qty	Last Action Time	Location Code	PO #
KCD5FRLTRAU3	In Transit	1	100	08/01/2013 06:33:26 PM		DNIBTST20
KCD5FRMTRA36	On Hand	1	100	08/01/2013 06:37:11 PM		DNIBTST20

1 to 2 of 2



Reports > Search > Card Search

Favorite

Details for card KCD5FRMTRA36

How do I?

Card Id: KCD5FRMTRA36 **Card KCD5FRMTRA36 - Cycle No:1**

Item No. Item 12

Create Time 08/01/2013

Cycle No: 1

Packing Slip No: 123

ReceiptNum:

PO Line # 0, Release # 0, Release Line # 0

Update

Submit Close



## 1.2 Kanban Board Tool Tip in Four Column View

We have enhanced the tooltip on the Kanban Board to show the details in four columns view. With this new approach we are able to accommodate more information and hence increasing the readability.

1 (Cards) 100 (Units)

**Card Details: KCD5FRLTRAU3**

Card Qty	100	Release Date	08/01/2013 06:32:25 PM
Accept Date	08/01/2013 06:32:45 PM	Ship Date	08/01/2013 06:33:26 PM
Req Ship Date	08/02/2013	Req Receive Date	08/05/2013
PO Number	DNIBTST20	PO Line Number	0
Release Number	RELEASE NO	Release Line Number	RELEASE LINENO
Expected Receive Date	08/02/2013	Supplier	A-Crib
Ship Qty	100	Tracking No	
Last Action By	trajan	Work Order Number	
Notes		Release Id	KCD5FRLTRAU3-001-9
Unit Price	12.00	Revision No	

### 1.3 Associate Supplier User to Other Supplier Business Units

Ultriva Plant Administrators can associate a supplier to user to multiple supplier business units. This feature will be very helpful when a supplier business unit has multiple sites/locations. This feature allows a supplier user to switch between their locations and perform their functions in Ultriva within single login.

The plant admin user can assign business units from supplier user list screen

**User List for DataSup1**

Filter By [ ] Select Operator [ ] Enter Value [ ] [Go]

Find User ID [ ] [ ]

[Add] [Edit] [Disable] [View] [More Options] [Back]

User ID	First Name	Last Name	Business units	Work Ph
add123	add	add	Business units	qa
another one	another one	another one	rajant@ultriva.com	another
qa11212	testuser	ere	rajant@ultriva.com	teere
qwer	ewre	dfghj	rajant@ultriva.com	dfgh

### 1.4 Master Label for Customer Module

Enable the Master Label functionality at Customer to Plant Level configuration level. Once the flag is enabled then through Supplier Actions/Master label one can create a master label for Customer shipments.

Filter By [ ] Select Operator [ ] Enter Value [ ] [Go]

[Show Unassigned Customers] [Update] [Remove] [Back]



Name	Location	Code	Site Code	Label	Auto Receive	Adjust Calculated Required ShipDate to EOD	Ship Via Master Label
[ ] [ ]	China	ISE_CH	[ ]	eBizKanban	[ ]	[ ]	[ ]


Sorted by: Name 1 to 1 of 1

Actions > Master Label

### Master Label List For Customer (TCK)

Plant: Customer (TCK) | Label Status: Created or Updated | Filter By: | Select Operator: | Enter Value: | Go

 No Master Label(s) found in the system. Please click Add Master Label button to create one. 

 Add

## 1.5 Production Sequence Enhancements

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The following enhancements have been made to the production sequence screen.

1. The custom fields can now be exported as Excel and are also available in print format for both operator and admin screens
2. The admin screen has an additional tab “**View Orders By Item**” to view orders summed by item for the week. The user can then use the paging functionality to view orders for the next 30 days
3. A new flag was added in the schedule configuration set up under the Screen Info tab called “**Show only new orders in active orders list**”. This flag if set will show all orders on the screen including the jobs on Hold.
4. The existing flag “**Automatically print on close**” in schedule configuration was enhanced with additional setting “**For Final Lot**”. If “for final lot” is set then the card will automatically print only when card is closed fully or manually final lot is checked.
5. Schedule configuration has a new tab “External Device Data Info” to export real time production start/close data.

## 1.6 Bill of Lading Based on Master Label

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*You wanted this feature. This enhancement is an idea from a customer.*

Supplier can now print the plant specific bill of lading document, if the master label feature is used by the supplier. The BOL document is generated as Adobe PDF file, based on the configured PO template, which may need to be changed. Currently this feature is exposed in the inter-org scenario. If you need this feature please consult with your service consultant.

**Master Label List** How do I?

Plant: Trane - Tyler | Label Status: Shipped | Filter By: | Select Operator: | Enter Value: | Go

Find Label ID:

Buttons: Add, View, Print, Ship

Label ID	Last Action By	Status	Total Cards	Cards failed to ship	Last Action Date
MLB2GT5TRAQF	10/10/2013 06:37:03 PM	Shipped	1	0	10/10/2013 06:14:48 PM
MLB2GT6TRAB5	10/10/2013 06:37:03 PM	Shipped	3	0	10/10/2013 06:40:05 PM

**BOL Information for: MLB2GT5TRAQF**

Freight Terms:  | Container No:

Seal No:

Print | > | X | Cancel

## 1.7 ERP/MRP Open PO Sync



*You wanted this feature. This enhancement is an idea from a customer.*

Currently in Ultriva suppliers can print print PO for only one card at time. Customers have been asking a way to print the consolidated PO. Ultriva implemented a new batch job to achieve this. ERP Connector can publish daily data dump of POs from their MRP/ERP system, which then will be loaded to Ultriva using the open PO sync batch job.

### Batch Job Report

Job Name:

Enter or select date range:

**Show Report | >>**

Integration											
Batch Job PO Sync Summary Report											
Job Name: JOBERPPOSYNC, Date Range: 10/01/2013-10/29/2013											
Batch ID	File Name	Uploaded On	Uploaded By	Status	Pending	Completed	Duplicates	Failed	Expired	Data Error	Data
BAT0033-131015-BSL5R	POSYNC_test53.txt	10/15/2013 11:45:42 AM	intgsvc	DONE	0	163	0	0	0	0	
BAT0032-131015-BSL2S	POSYNC_test52.txt	10/15/2013 11:35:55 AM	intgsvc	DONE	0	0	0	0	0	0	

Batch Job PO Sync data								
Line #	Item	Plant Code	PO #	PO Line #	Release #	Release Line #	StatusMsg	Status Change Date
2	XC1120	M1	4969	1	43	1	Order record created.	10/15/2013 11:46:39 AM
3	XC1120	M1	4969	1	44	1	Order record updated.	10/15/2013 11:46:39 AM
4	XC1120	M1	4969	1	45	1	Order record updated.	10/15/2013 11:46:39 AM
5	XC1120	M1	4969	1	46	1	Order record updated.	10/15/2013 11:46:39 AM
6	XC1120	M1	4969	1	46	2	Order record updated.	10/15/2013 11:46:39 AM
7	XC1120	M1	4969	1	46	3	Order record updated.	10/15/2013 11:46:39 AM
8	XC1120	M1	4969	1	46	4	Order record updated.	10/15/2013 11:46:39 AM
9	XC1120	M1	4969	1	47	1	Order record updated.	10/15/2013 11:46:39 AM
10	XC1120	M1	4969	1	47	2	Order record updated.	10/15/2013 11:46:39 AM
11	XC1120	M1	4969	1	48	1	Order record updated.	10/15/2013 11:46:39 AM

## 1.8 Print PO for Supplier Based on ERP/MRP Open PO Sync Data

**NOTE:** In order to take advantage of this feature, you have to add the integration point mentioned in 1.7 above for the ERP/MRP Open PO Sync. This feature requires additional development effort for both Interface and PO template.

New “Print PO” action menu added under Supplier Actions. This option allows suppliers to print the consolidated purchase order. The currently available Print PO feature allows the suppliers to print PO by card from Accept and Print Cards screens. With this new feature they can view and print the consolidated PO info. This screen uses the open PO data loaded in to Ultriva using the open PO sync batch job

**Supplier Actions**

**Accept**  
View and acknowledge new kanban orders

**Set WorkOrder No.**  
View the list of acknowledged kanban Cards. Use this screen to update the workorder number for the acknowledged Cards

**Pick List**  
Create pick list for warehouse shipping

**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 Production Orders**  
View list of orders to complete production. Use this screen to reschedule the orders for production

**Print PO**  
View the list of POs and print PO. ←

**Print PO List** How do I?

Plant: Seattle Manufacturing Filter By:  Select Operator:  Enter Value:  Go

Find PO #:  Print PO

PO #	Create Time	Created By	Freight Terms	FOB	Ship Via	Status	
6045	04/19/2013	ultrivauser,	Due	Origin	UPS	APPROVED	
PO Line #	Item	Description	Quantity	UOM	Unit Price	Ext Price	Notes
1	CM96713	Screws.Zinc.28.Phillips	100	Each	0.01	0.60	



**Print PO List** How do I?

Plant: Seattle Manufacturing Filter By:  Select Operator:  Enter Value:  Go

Find PO #:  Print PO

Standard POs | Blanket POs

PO #	PO Line #	Release #	Create Time	Created By	Freight Terms	FOB	Ship Via	Status
4969	1	48	02/19/2013	Smith, Mr. Jonathan	Due	Origin	UPS	APPROVED

Release Line #	Item	Description	Quantity	UOM	Unit Price	Ext Price	Notes
1	XC1120	Game Girl Controller II	10	Each	10.15	101.50	

## 1.9 Inventory Cost Report

Added additional options to calculate the Inventory Cost. Currently this report shows the values as of month end. Now we added three more options:

1. Monthly Average
2. Weekly Average
3. Daily

**On Hand Inventory Cost** How do I?

\* **Date Range:** 08/01/2013-10/31/2013

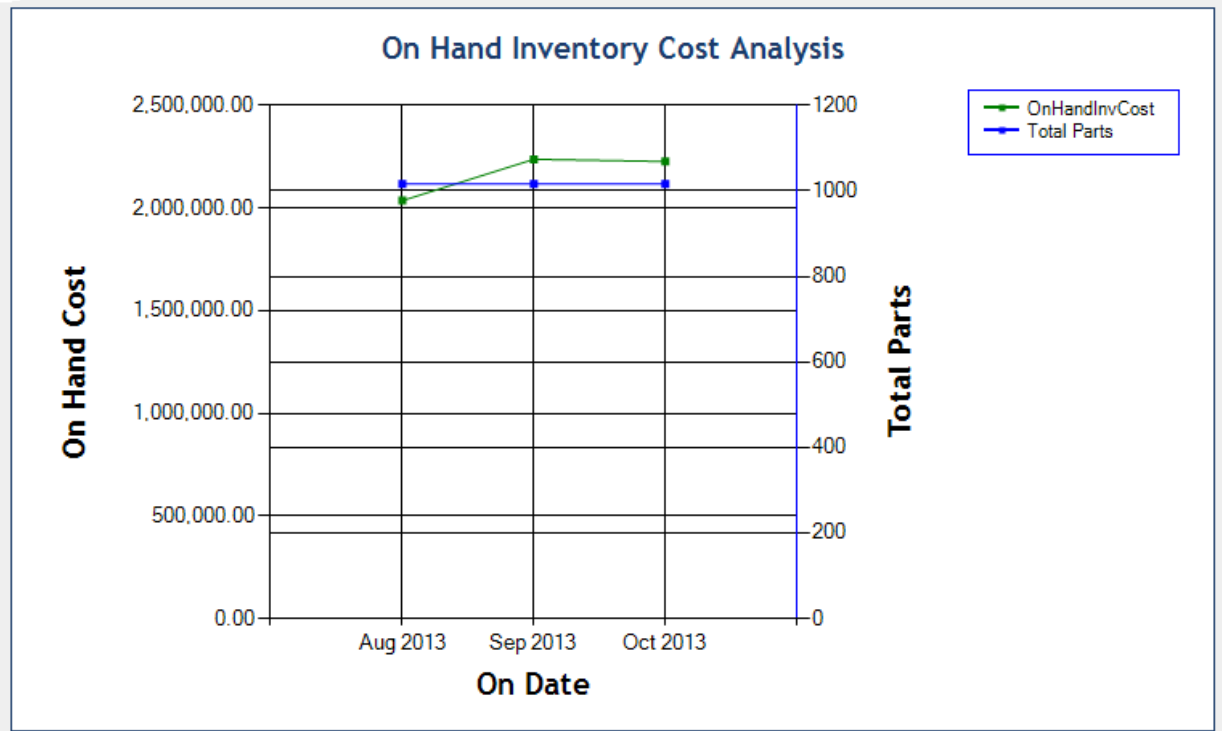
**Product Line:**

**Category:**  Kanban  Forecast  All

\* **Valuations As Of:** Month End  
Monthly Average  
Weekly Average  
Daily  
End

\* **Chart Style:**

Product Line: All, Date Range: 08/01/2013-10/31/2013, Category: All, Valuations As Of: Monthly Average



### 1.10 View Notes History Report

Added additional filter Purchase Order Number and Purchase Order Line Number options to this report.

The form includes the following fields and options:

- Enter or Select Date Range: 01/01/2013-02/14/2013
- Supplier: [Text Input]
- Item: [Text Input]
- PO #: [Text Input]
- PO Line #: [Text Input]
- Cards:  All Cards  In Cycle Cards

An arrow points to the PO # field.

### 1.11 Sharing custom report with Supplier

Additional option has been added to Custom Report so that a report can run as a supplier. This option allows the suppliers to run the reports on their context. Custom Report engine automatically adds the supplier filter and retrieves the data based on current logged in business unit.

**Show Custom Report** How do I?

**Name:** Shipment Summary  
**Type:** Kanban: History (Group - Detailed)  
**Description:** Shipment Summary

**\* Date Range:**  
 Create Time   
 Last Action Time   
 Max Date Range: 92 days

**Run as:**   ←

## 1.12 Dismiss Alerts by Selection

We now allow users to select and dismiss alerts through Manage Alerts module.

Select Manage option

The screenshot shows the 'Alerts' list page. At the top right, there is a dropdown menu with two options: 'Manage' (highlighted in green) and 'Dismiss All'. An arrow points to the 'Manage' option. Below the menu is a table of alerts:

Date ▼	Subject ▼		
01/11/2013	Potential Stock-out for Item: 10225...		
01/11/2013	Potential Stock-out for Item: 10268...		
01/11/2013	Potential Stock-out for Item: 10264...		
01/11/2013	Potential Stock-out for Item: 10225...		

At the bottom, there is a pagination control: 'Sorted by: Date', '1 to 4 of 104', and buttons for 'Prev', 'Page 1', and 'Next'.

In the Alerts list page, users can select alerts by clicking the check mark and then click dismiss option to selectively dismiss alerts.

**Alerts List**

Filter By  Select Operator  Enter Value

◀ Prev Next ▶ Dismiss Dimiss All Back

<input type="checkbox"/>	Date ▼	Subject ▼	Source
<input checked="" type="checkbox"/>	01/11/2013	Potential Stock-out for Item: 10225...	KCD
<input checked="" type="checkbox"/>	01/11/2013	Potential Stock-out for Item: 10268...	KCD
<input checked="" type="checkbox"/>	01/11/2013	Potential Stock-out for Item: 10264...	KCD
<input checked="" type="checkbox"/>	01/11/2013	Potential Stock-out for Item: 10225...	KCD
<input type="checkbox"/>	01/11/2013	Potential Stock-out for Item: 10225...	KCD
<input type="checkbox"/>	01/11/2013	Potential Stock-out for Item: 10268...	KCD
<input type="checkbox"/>	01/11/2013	Potential Stock-out for Item: 10268...	KCD
<input type="checkbox"/>	01/11/2013	Potential Stock-out for Item: 10265...	KCD
<input type="checkbox"/>	01/11/2013	Potential Stock-out for Item: 10265...	KCD
<input type="checkbox"/>	01/11/2013	Potential Stock-out for Item: 10225...	KCD

### 1.13 Export Alerts

Export Alerts from Alerts List page does not truncate the alerts subject. And the export list contains the alert body too.

Alerts

**Alerts List** [How do I?](#)

Please note that the message may contain some html markup characters based on how the alerts are configured.

	A	B	C	D	E	F	G	H
1	Date	Subject	SourceID	Message				
2	01/11/2013	Potential Stock-out for Item: 10225610	KCD2473G	<p>Based on the calculated average daily usage,				

### 1.14 Rule Wizard – Sorted Field Selection List

Rule Wizard's Field Selection Popup list shows the field names in alphabetical order.

### Select a Field

Card Fields
Cycle Fields
Item Fields
Plant Fields

<input type="radio"/> Accepted Date	<input type="radio"/> Action	<input type="radio"/> Action Time
<input type="radio"/> Approved Quantity	<input type="radio"/> Card Cycle Id	<input type="radio"/> Card Cycle No
<input type="radio"/> Card Id	<input type="radio"/> CompletedQty	<input type="radio"/> DecimalFactor
<input type="radio"/> DueDate	<input type="radio"/> ExpectRecvDate	<input type="radio"/> ExpireDt
<input type="radio"/> IGParams	<input type="radio"/> Last completed cycle No	<input type="radio"/> LastReceivedTime
<input type="radio"/> LocationCode	<input type="radio"/> Maintenance Date	<input type="radio"/> NextOperGID
<input type="radio"/> OperComplQty	<input type="radio"/> OperSchStatus	<input type="radio"/> Original Required Receive Date
<input type="radio"/> Original Required Ship Date	<input type="radio"/> PackingSlipNo	<input type="radio"/> PrevLocationCode
<input type="radio"/> PrevOperComplQty	<input type="radio"/> Printed Date	<input type="radio"/> Qty Per Card
<input type="radio"/> RecallAcceptDate	<input type="radio"/> RecallAcceptedBy	<input type="radio"/> RecallDate
<input type="radio"/> RecalledBy	<input type="radio"/> Received Date	<input type="radio"/> Received Quantity
<input type="radio"/> Released Date	<input type="radio"/> ReqAcceptDate	<input type="radio"/> Required Receive Date
<input type="radio"/> Required Ship Date	<input type="radio"/> ScheduleDay	<input type="radio"/> SchSeqNo
<input type="radio"/> Ship Tracking Number	<input type="radio"/> Shipped Date	<input type="radio"/> Shipped Quantity
<input type="radio"/> State	<input type="radio"/> SupplierPromiseDate	<input type="radio"/> Release ID

### 1.15 Auto Resize Wizard – Recalculate the Value

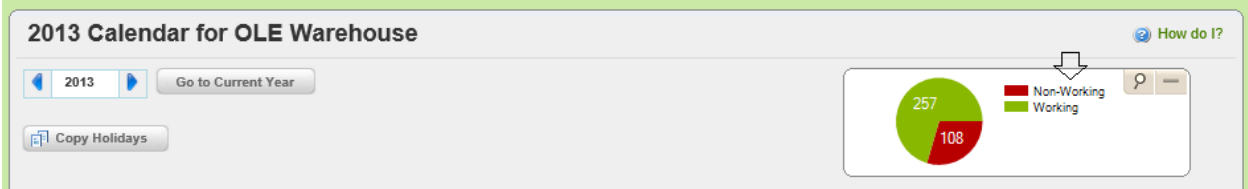
Auto Resize wizard recalculates the Total value if user changes the suggested card count and clicks the “calculate Safety stock” button.

In this screenshot below an user changed suggested card counts for few items and the wizard displays both the suggested value and new.

Increasing Demand: <b>0 Items</b> (includes Resetting Delete cards Count: <b>0 Items</b> )	No Changes: <b>2 Items</b>
Decreasing Demand: <b>12 Items</b>	New Total Value of Cards To Add/Delete: <b>(£431,192.54)</b>
Total Value of Cards To Add/Delete: <b>(£489,033.99)</b>	

# 1.16 Calendar Page

We made minor changes to the Calendar page. The chart title shows as Non-Working instead of Holidays.



We also modified color coding for the holidays.

December						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	↑			

## 2 Additional Enhancements

1. Receive accepted cards: Added validation for Packing slip and tracking number information.
2. Master Label and child cards can be printed from the Master label ship results screen.
3. Split by Lot Size setting at Item Level for forecast items. With this setting some items can be configured to be ordered in big lots.
4. Forecast Batch job load to expire previous batch logic has been modified.
5. Forecast Trend Chart Legend changed to Gross Requirements instead of Series1.

### 6. 7.6 P3

- a. When a BOL is printed by the supplier, notes can be added.
- b. The integration Batch supports Export/Import of XML file formats.
- c. The PICK List Details are included in to the print card map.
- d. New CloseOperation integration implemented.
- e. New ConsumptionHistory API implemented.
- f. For the OrderStatus API, date range support is added.
- g. The Item Sync Integration now supports Source Locator Code for Oracle integration.
- h. Filter strip is added to Resequence Production Orders action.

### 7. 7.6 P4

- a. Aggregation for on-hand inventory for internal item number to purchase part item number.
  - i. Set the below setting to “ON” in business unit configuration.

**Workcenter Configuration for: WHSE121D** Last modified on [01/21/2014] by [rajan t] [How do I?](#)

General Card Custom Integration Pick List Print Receive Release Scan Ship

**Configuration Settings**

Name	Value
Approvals for Virtual Kanban Release <a href="#">?</a>	<input type="checkbox"/> OFF
Aggregate on hand inventory from internal item number to purchase item number for Virtual Kanban Release <a href="#">?</a>	<input type="checkbox"/> OFF
Consumption Scan for Forecast Items <a href="#">?</a>	<input type="checkbox"/> OFF
Release Planned Orders by Lotsize for Forecast Items <a href="#">?</a>	<input type="checkbox"/> OFF
Reset card location to item location on release <a href="#">?</a>	<input type="checkbox"/> OFF

\* Required field Save | X | Cancel

- ii. Enter the internal item number for the purchase part. Currently one internal item number per purchase part.

**Modify Item B129759P03** Last modified on [11/11/2013] by [rajan t] [How do I?](#)

Base Information Supplier Additional Information UOM Information Notes Custom Field List

IGParams

Name	Value
Sub Inventory:	<input type="text"/>
Adhoc receipts for item:	<input type="radio"/> Enabled <input checked="" type="radio"/> Disabled
Order by lot size <a href="#">?</a>	Inherit
Internal item number <a href="#">?</a>	<input type="text"/>

\* Required field Save | X | Cancel

- b. The integration Batch supports Export/Import of XML file formats.
- c. Added support for AIAG (Automotive Industry Action Group) standard prefixes on the label barcode.

Name	Value
Email Printing of Kanban Cards	OFF
Print Kanban Card using Ultriva Software	ON
Number of Label copies to Print	Slider
Auto print cards that are to be printed	OFF
Auto print cards interval (in minutes)	Slider
Auto create pick list	OFF
Print cards action to print only picklist cards	OFF
Item barcode prefix	Text Input
Kanban card barcode prefix	Text Input
Quantity barcode prefix	Text Input

**8. 7.6 P7**

- a. New PO Receipt Cancel integration task and API added.
- b. The PO Sync task supports notes that are large texts.

**9. 7.6 P8**

- a. The Material Status Report now supports Item Description.
- b. Added a new Integration Batch Job, KanbanReleaseOrders: Release orders based on external kanban system bin ids.
- c. PO Receipt Cancel Integration - Additional setting to recall in-transit state is available.
- d. PO Receipt Cancel Integration - Optional open order quantity field is available in case to calculate the right cancel quantity.



### 3 Bug Fixes

1. Auto Page scroll on Excel Reports now fixed.
2. \$Email Task Params fix for SMTP Port. If SMTP port is not given then default SMTP port is used.
3. **7.6 P3**
  - a. Shipments Due and Receipts Due Reports Fixed.
  - b. On the PickNShip action, added the bug fix to move the card to Ship Hub (if master label is enabled on the supplier).
  - c. Close Production action Search by item bug is fixed.
  - d. The date range filter was not getting applied on the data export on the Forecast orders and it is fixed now.
4. **7.6 P4**
  - a. The date range filter was not getting applied on all the reports and it is fixed now.
  - b. The Receive and Ship action bug fix on packing slip number is fixed.
  - c. My Item filter bug is fixed.
5. **7.6P7**
  - a. The batch job status count bug on export data is fixed.
  - b. The scan page showed the last 25 results only, this bug is fixed to show all.
6. **7.6P8**
  - a. The master label ship access rights bug is fixed.
  - b. The view notes history report on the supplier side is fixed.