Ultriva 7.9.1 Release Notes

By Upland Software
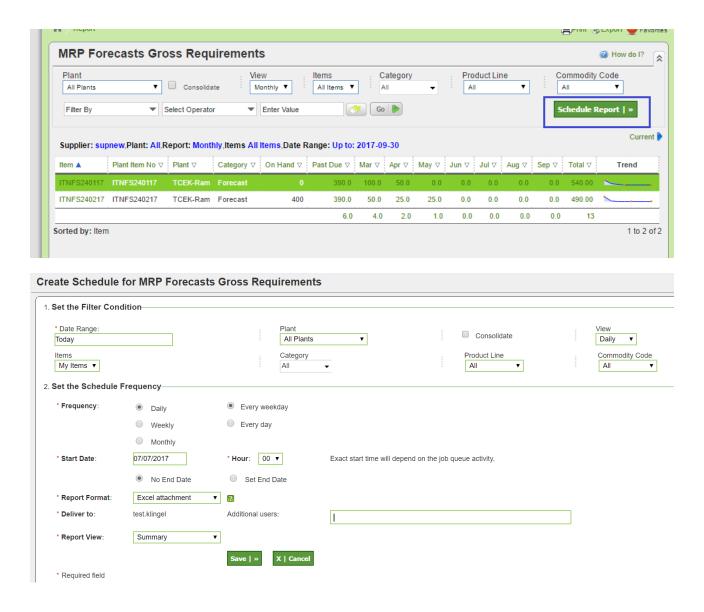
Version 1.1

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1   Supplier MRP Forecasts Scheduled Report

Added a report for Supplier MRP Forecasts Gross Requirements and MRP Forecasts Planned Orders, which can be scheduled to run and configured to be sent to specific users email addresses.

Print Export Favorites

MRP Forecasts Gross Requirements   How do I?

Plant	View	Items	Category	Product Line	Commodity Code
All Plants ▼ ☐ Consolidate	Monthly ▼	All Items ▼	All ▼	All ▼	All ▼

Filter By ▼   Select Operator ▼   Enter Value   Go ▶   **Schedule Report | »**

Supplier: **supnew**,Plant: **All**,Report: **Monthly**,Items **All Items**,Date Range: **Up to: 2017-09-30**

Current ▶

Item ▲	Plant Item No ▽	Plant ▽	Category ▽	On Hand ▽	Past Due ▽	Mar ▽	Apr ▽	May ▽	Jun ▽	Jul ▽	Aug ▽	Sep ▽	Total ▽	Trend
ITNFS240117	ITNFS240117	TCEK-Ram	Forecast	0	390.0	100.0	50.0	0.0	0.0	0.0	0.0	0.0	540.0	
ITNFS240217	ITNFS240217	TCEK-Ram	Forecast	400	390.0	50.0	25.0	25.0	0.0	0.0	0.0	0.0	490.00	
					6.0	4.0	2.0	1.0	0.0	0.0	0.0	0.0	13	

Sorted by: Item   1 to 2 of 2

Create Schedule for MRP Forecasts Gross Requirements

1. Set the Filter Condition

* Date Range:	Plant	☐ Consolidate	View
Today	All Plants ▼		Daily ▼
Items	Category	Product Line	Commodity Code
My Items ▼	All ▼	All ▼	All ▼

2. Set the Schedule Frequency

* **Frequency**:   ◉ Daily   ◉ Every weekday
                   ○ Weekly   ○ Every day
                   ○ Monthly

* **Start Date**: 07/07/2017   * **Hour**: 00 ▼   Exact start time will depend on the job queue activity.

                   ◉ No End Date   ○ Set End Date

* **Report Format**: Excel attachment ▼ ☑

* **Deliver to**: test.klingel   Additional users: [   ]

* **Report View**: Summary ▼

                   [Save | »]   [X | Cancel]

* Required field

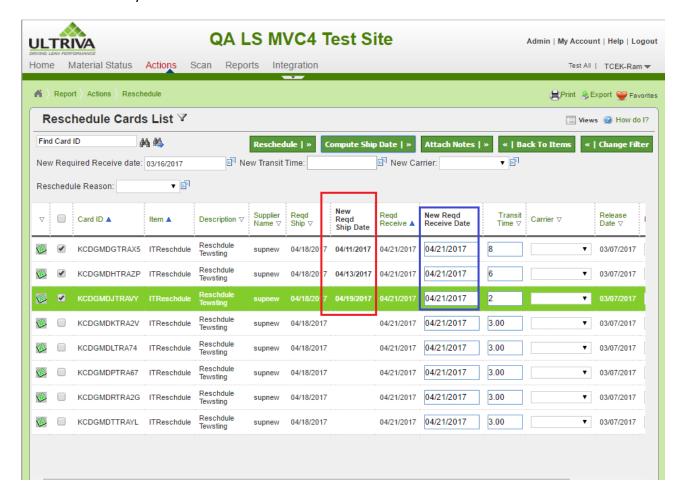## 2   Grouped Purchase Order Approval Process

POs can be grouped by a buyer and integrated with Customer ERP after the Customer ERP integration is developed.

Refer to Appendix 'A' for details on Grouped Purchase Order Creation Approval Process
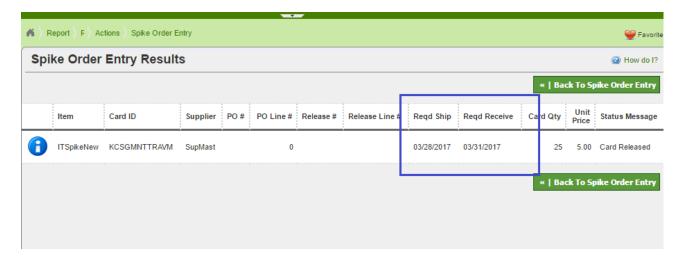
3 Reverse Calculate Required Ship Date

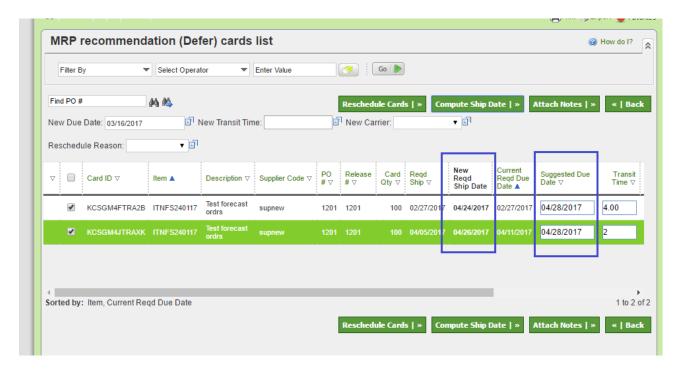Reverse calculate required ship date feature was added to prevent scheduling conflicts.

a. Required ship date is calculated based on New Required Receive Date by taking into account the Transit Time on the following screens
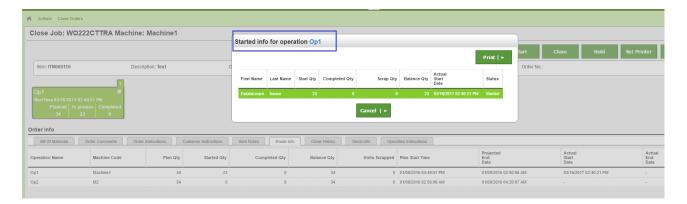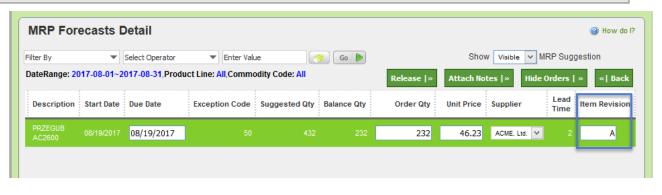
    i. Buyer Reschedule:
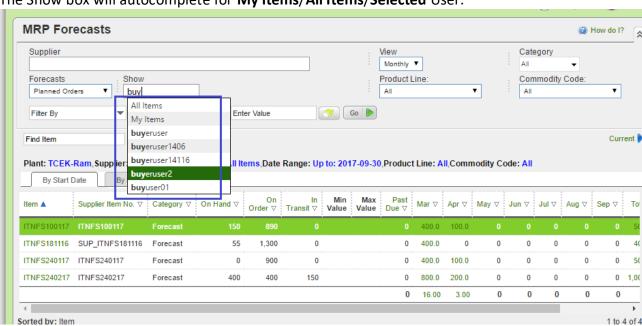
ii.   Spike Orders:

iii.   Planned orders screen:

4 Popup to Show Started Job for Work Order

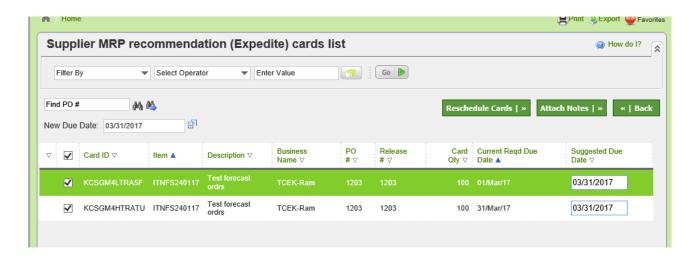# 5 Releasing Planned Order Screen – added "Item Revision" column

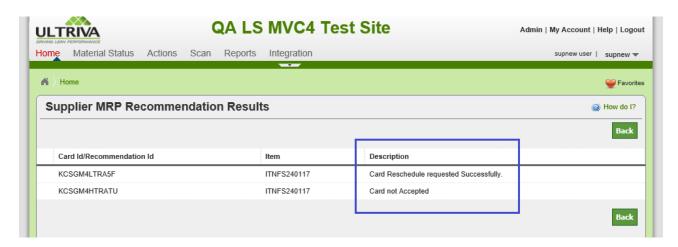# 6   Planned Order Screen – "Show" field will auto-complete

The Show box will autocomplete for **My Items/All Items/Selected** User.

7   Supplier MRP Recommendation Results Will Show Card State

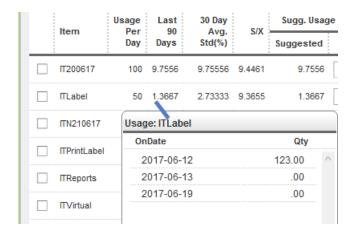After clicking Reschedule Cards, the Card State is shown in the Description.

Cards state:

Sorted by: Card ID

8 Added Tool Tip on the Auto-Resize Report to Show Consumption

When you hover over your mouse over the "Last 90 days" for an item, a tool tip pop-up now appears.

9 Spike Order Cards Can Be Created Based on Quantity On Card and Number of Cards For Forecast and Kanban Items

Forecast Items:

Kanban Items:

10 "Item" Renamed to "Supplier Item No" on Supplier Reschedule Request Items List Screen

The "Item" column header on the Reschedule Request Items List screen as renamed to "Supplier Item No" to improve clarity / ease of use.

11 Add Columns "Category" and "Supplier Name" to On Hand Inventory Summary Report

Two new columns were added to the On-Hand Inventory Summary Report to allow for improved clarity / ease of use: "Category" and "Supplier Name".

12 Bug Fixes

- Fixed shipped card quantity bug for Ship by Box when Recalling shipped cards.

- If Console Ship is enabled, fixed shipped card quantity with partial ship when card is recalled from console state.

- Fixed OEE report to correctly show 'operator efficiency total completed' units.

- Fixed an issue if more than 3 files were attached for Request Quality Approval.

- Fixed exporting the search results for searched supplier name.

- Fixed issue where a card could be picked more than once for a picklist ID.

- Fixed create picklist with add filter.

- Fixed Close order issue when all operations done.

- Fixed issue with required ship date when cards released through Item / Cards / Add Remove Cards / Adjust Loopsize.

- Fixed removing wrong status message when cards released through item loopsize for Required Ship/ Required Receive is greater than today.

- Fixed issue where Supplier Reschedule Request was not taking the plant holidays into account.

- Fixed Card status message for Expedited cards on the MRP Recommendation screen.

- In the Material Certificate Approval Process, the child card is now inheriting the Master Certificate Approval from the parent card.

- Fixed issue with applying a filter on the Print Item List view icon.

- Fixed issue with creating picklist with add filter.

- Fixed display issue where remaining balance quantity showed negative when starting operation.

- Fixed quality check required count at Quality Approval in Work Orders.

- Fixed SetPO issue with SupplierPOReleaseLineNum when SupplierPOReleaseNum was

empty.

- Fixed issue with validating PO for RFQ Item.

- Fixed issue where start qty and balance qty was not updated after scrapped qty at route info for a work order.

- Fixed screen navigation in MRP Recommendations for Defer/Expedite Orders when resetting a filter.

- Fixed issue where remaining balance qty goes to a negative value at Quality Approval operator for a work order.

- Fixed issue where completed qty shows negative value on the info pop up screen for Quality Approval operator for a work order.

- Fixed issue with Expiry Date temporary cards created through Item / Cards / Add Remove Cards.

- Fixed issue with Default Notes for MRP Forecasts Detail.

- Fixed the issue where Spike orders where maximum Quantity On Card created zero qty card.

- Fixed required ship and receive calculation issue for spike cards when reqship date is changed and the card is in the accepted state.

- Fixed date range validation issue where FROM date was greater than TO date.

- Fixed receive quantity issue when receipt happens as the card is scanned for release, it was defaulting to receiving the card quantity instead of the shipped quantity.

- Fixed status message for BuyerRecall when card is in Accept Recall waiting list.

- Fixed issue for Required Receive Date Calculation when Calendar Days - ON for the configuration setting.

- Fixed filter issue for "All Plants" for Purchase Order Integration Status.

- Fixed header name when creating filter on ship and receive items list.

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Appendix A: Virtual (Grouped) Purchase Order Creation and Approval Process

By Upland Software

Version 1

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15   Virtual (Grouped) Purchase Order Approval Process

15.1 User settings for PO approval:

User screen changes:

Added Purchase Order Approval section with 2 fields: PO Value Limit - textbox
Supervisors - lookup, multi, plant users

Validation:

PO Value Limit textbox has to be empty or to have number >= 0
If PO Value Limit > 0 supervisors must be selected, otherwise validation error.
If PO Value Limit is not a number or < 0 - validation error.
Supervisors' field might have values even if PO Value limit is blank or 0

Edit User buyeruser

Personal Information

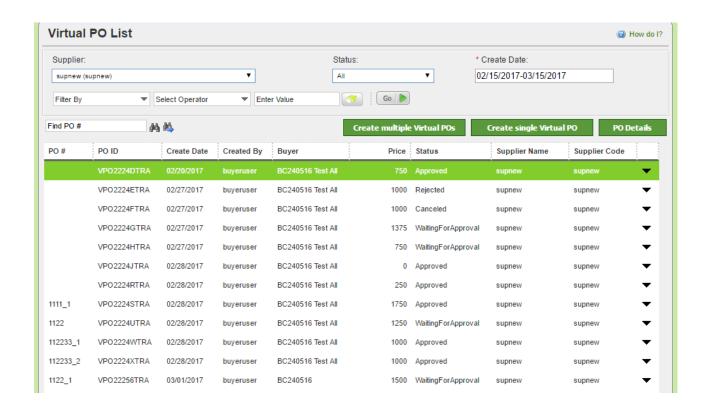|			
* First Name:	Test	MI:	* Last Name:	All
* Work Phone:	9848970892		Mobile Phone:	9848970892
* Email ID:	agollapudi@uplandsoftware.com		Locale:	Not Set ▼
* Time zone:	(GMT+05:30) Chennai, Mumbai, New Delhi ▼			

Account Information

* User ID:	buyeruser	Business unit:	TCEK-Ram
* Account Type:	Plant Administrators ▼ Show Privilege	Buyer Code:	BC240516
Skip Lot Plan:	-- Select -- ▼		

Purchase Order Approval

Virtual PO Value Limit:	1000	Supervisors:	supervisor1 ✕

Password Information

If you enable SSO for this user then Password and other security details are managed in your Identity Provider

Local Login ▼

Password must be greater than 8 character(s).
Password must contain at least 1 number, at least 1 uppercase character(s), at least 1 lowercase character(s) and at least 1 punctuation character(s).
Every 90 days your Password will expire.

15.2 Virtual (Grouped) PO creation process:

Menu item: Buyer Actions -> Virtual (Grouped) Purchase Order.
Here we can review created Virtual (Grouped) POs:

To create a new Virtual (Grouped) PO click on Create single Virtual (Grouped) PO or Create Multiple Virtual (Grouped) POs button:

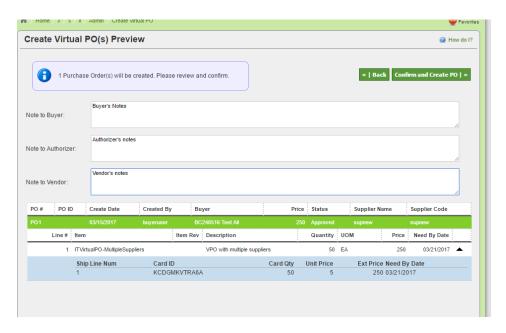## 15.3 Create Virtual (Grouped) PO through single Virtual (Grouped) PO:

Here we see a list of items with cards in status Waiting For PO (same as sep PO action) but not yet added to any Virtual (Grouped) PO.

Supplier in this filter is mandatory field.

To create Virtual (Grouped) PO, Buyer must be selected, PO # is optional.
Buyer user should have PO Value limit and Supervisors should be set in User configuration.
Next screen is preview for Virtual (Grouped) PO. Here the user can add a header note to buyer, note to authorizer and note to vendor:
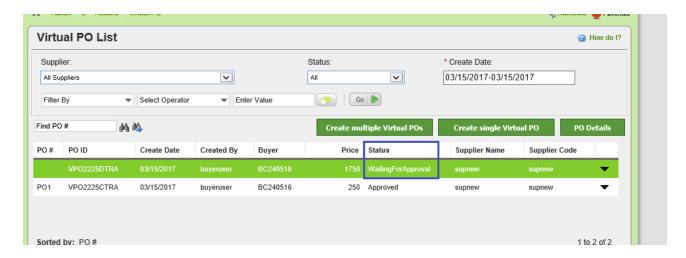
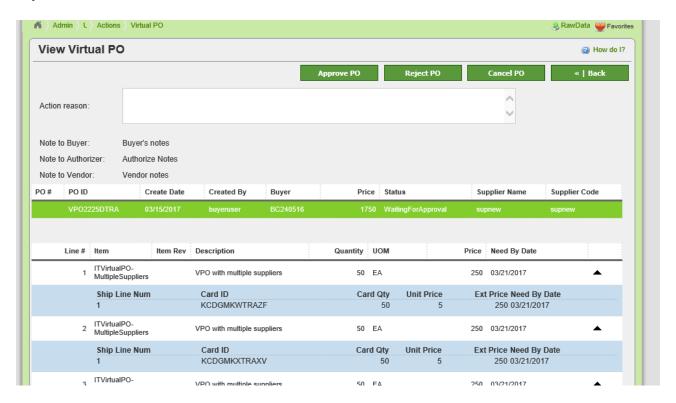After the user clicks Confirm and Create PO, a Virtual (Grouped) PO will be created:

If total PO value is less than PO Value Limit for the buyer (not for the person who actually creates a Virtual (Grouped) PO but for the **selected buyer user**) a PO will be created in status Approved.

If PO value is greater than buyer's PO Value limit, a Virtual (Grouped) PO will be created in status Waiting For Approval.

On Virtual (Grouped) PO List page, a **Supervisor** can select POs awaiting his/her approval:

On the PO Details page, if this PO requires this user's approval, they will have 3 options: Approve, Reject and Cancel.
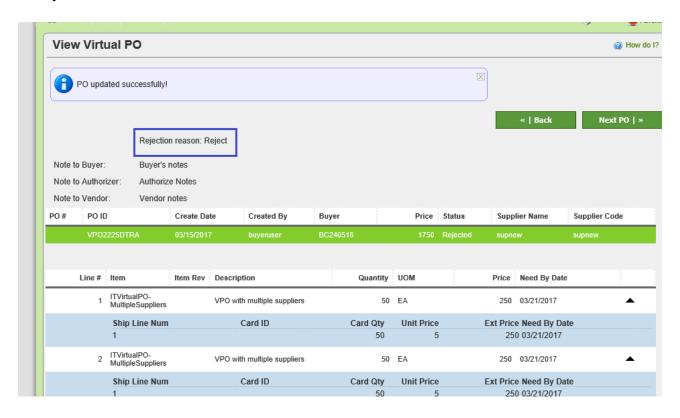

Permissions for Approve/Reject: buyer's supervisor , person to whom buyer's supervisor delegated PO Approval.

POs in status Approved, Reject, Waiting for approval can be moved to status Cancelled.
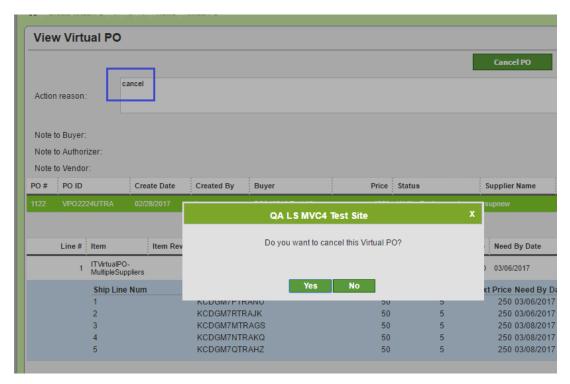
Permissions for Cancel: buyer, user created PO and buyer's supervisor, person to whom buyer's supervisor delegated PO Approval.
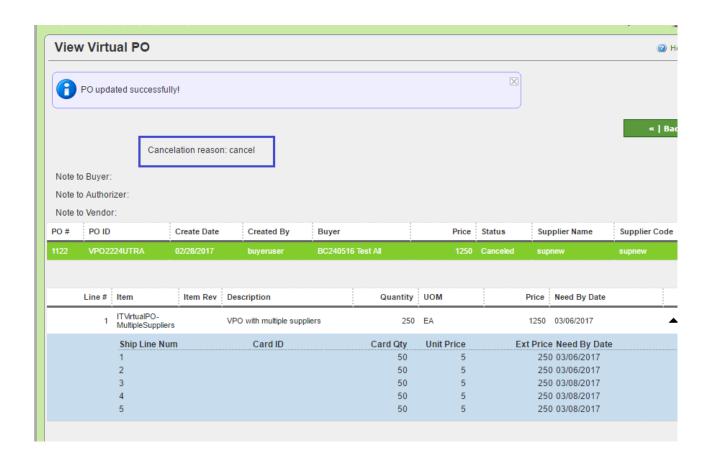
For reject and cancel, the user is required to provide a reason.
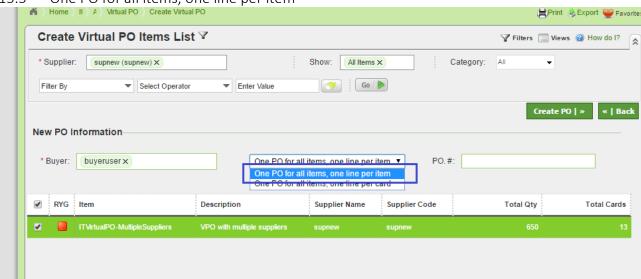
PO rejected with reason:
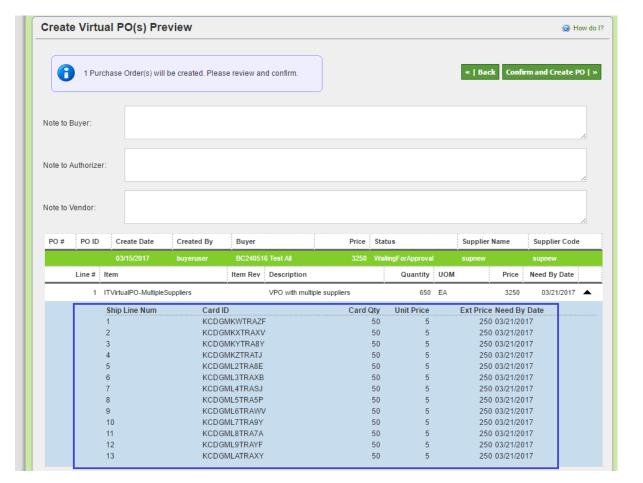

PO can be canceled after:

View Virtual PO

 PO updated successfully!

« | Bac

Cancelation reason: cancel

Note to Buyer:
Note to Authorizer:
Note to Vendor:

PO #	PO ID	Create Date	Created By	Buyer	Price	Status	Supplier Name	Supplier Code
1122	VPO2224UTRA	02/28/2017	buyeruser	BC240516 Test All	1250	Canceled	supnew	supnew

Line #	Item	Item Rev	Description	Quantity	UOM	Price	Need By Date
1	ITVirtualPO-MultipleSuppliers		VPO with multiple suppliers	250	EA	1250	03/06/2017

Ship Line Num	Card ID	Card Qty	Unit Price	Ext Price	Need By Date
1		50	5	250	03/06/2017
2		50	5	250	03/06/2017
3		50	5	250	03/08/2017
4		50	5	250	03/08/2017
5		50	5	250	03/08/2017

15.4 Create Virtual (Grouped) PO through single Virtual (Grouped) PO button
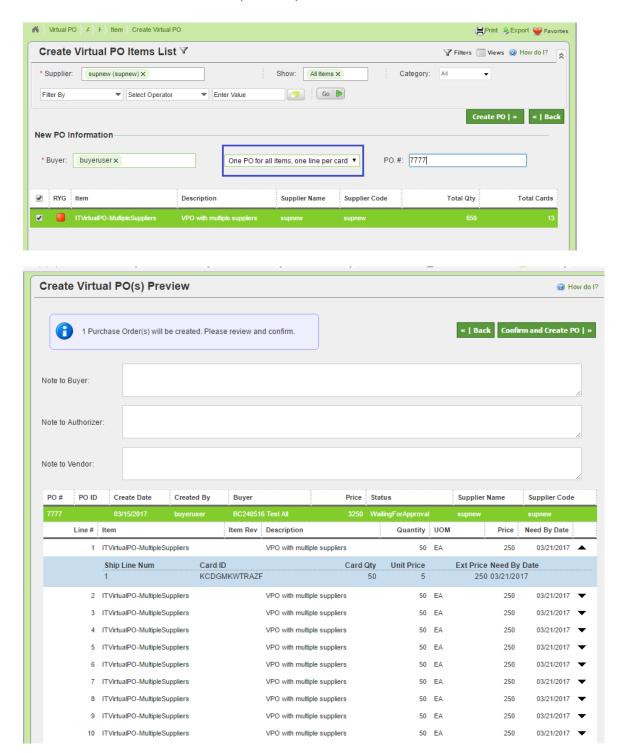
15.5 One PO for all items, one line per item

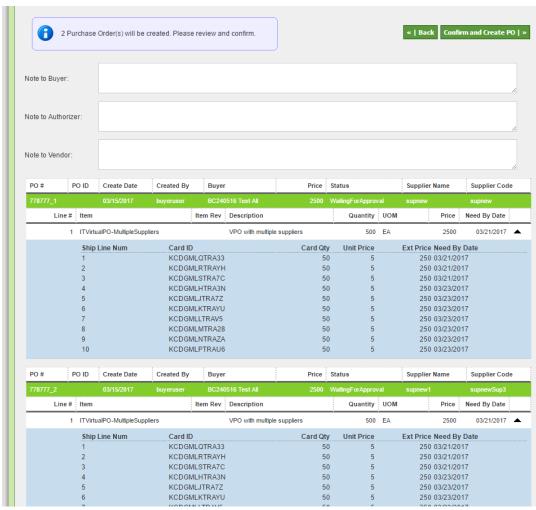## 15.6 One PO for all items, one line per card.

Creates one PO for all items and one line per every card.
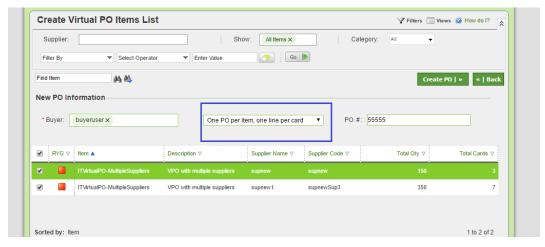
15.7   One PO for one item, one line for all cards

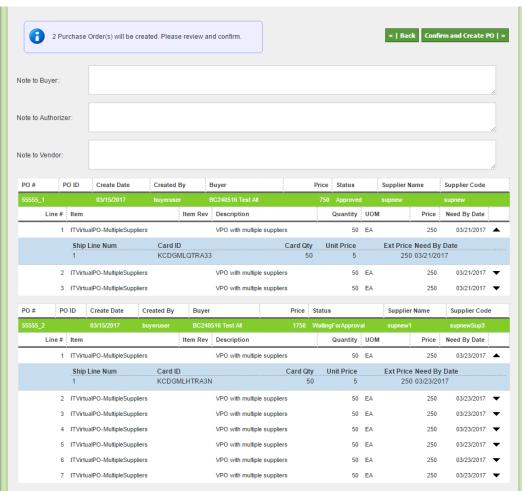Creates one PO per every item(like PO#_1,PO#_2..etc) and one line for all cards.

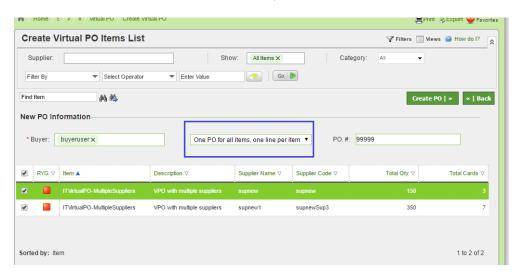## 15.8 One PO for one item, one line per card

Creates one PO per every item(like PO#_1,PO#_2..etc) and one line per card.
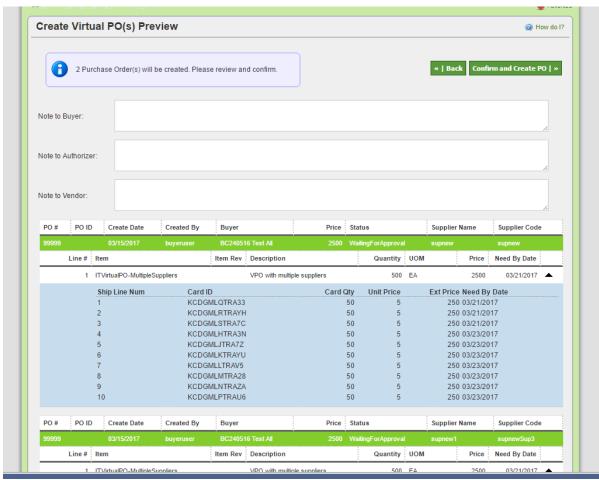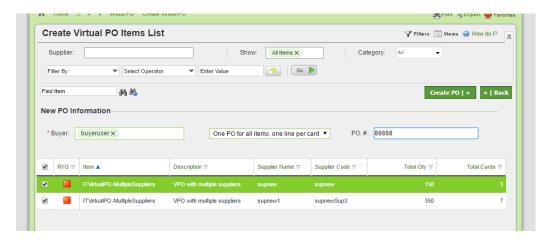
15.9   One PO for all items, one line per item.

Creates one PO for all item and one line per item.
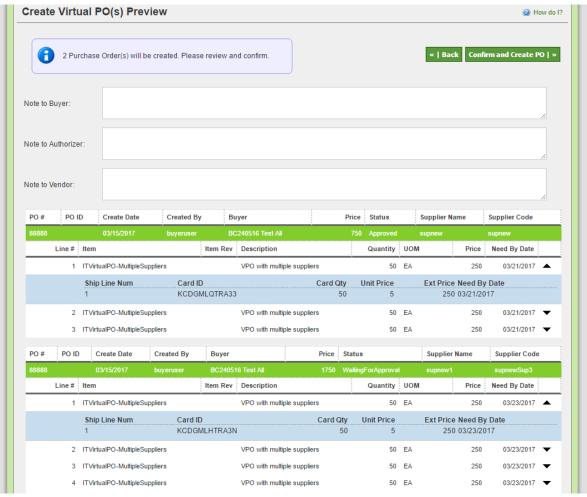
15.10   One PO for all items, one line per card.

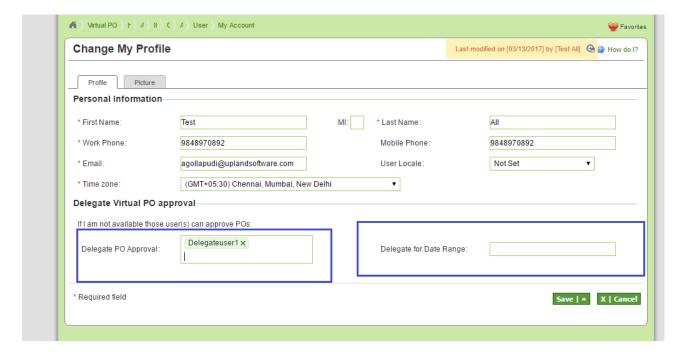Creates one PO for all item and one line per card.

15.11 Delegate Approval

If a supervisor-level user is not available, a delegate user can approve POs:

On "Change My Profile" page, an optional field for Delegate Virtual (Grouped) PO Approval was added as well as a date range in which this exception applies.
Neither are required fields. If the Date Range is entered it must be a valid date range.
The delegate user will be considered as the Approver only during specified date range.

15.12 PO Integration retry report

Virtual (Grouped) PO data is displayed in the Purchase Order Integration status report as shown below: