ULTRIVA
DRIVING LEAN PERFORMANCE

Ultriva 7.6 and Higher

Custom Reports

Reference Guide

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Custom Reports Overview

Quick Tip – "Custom Reports" can be "created" and "saved" within Ultriva. The reports can also be "shared" with other users within the same plant.
All reports that require a date range have a 92 day maximum for data extraction. You can select from any date range within the 92 days. The reason for the 92 day max is the report runs in a "Live" database and the performance could be affected when running larger reports.

There is a "User Guide" located in the "Ultriva Help Portal". To navigate to this site, click on the link below.

http://help.ultrivalms.com/v70/pdf/en-us/UltrivaCustomReportUserGuide.pdf

There is an "Ultriva Expression Evaluator Cheat Sheet" located in the "Ultriva Help Portal". To navigate to this site, click on the link below.

http://help.ultrivalms.com/CheatSheets/UltrivaExpressionEvalCheatSheet.pdf

Reports types that are available include "Admin, Users, Suppliers, Items, Log-In Sessions and Kanban". This guide will give you a better understanding of the "Active Cards, Cross Tab History, History and Kanban" reports.

– "Active Cards", will retrieve the "Card Details" on cards that are currently "Active" in the system. Information such as the "Current Card State", the "Last Date/Time the card was moved" can be retrieved.

– "Cross Tab History", will retrieve the "Card Details" on "Previously Complete Cycles". This report is similar to the "Excel Card History Report"

– "History", will retrieve the "Card History" details. This is a detailed report retrieving information for "All Card Actions". (Released, Rescheduled, Recalled, Shipped, etc., combined) This can be a very time consuming report to run so it may need to run during the "Off" peak hours.

– "Action Audit", will retrieve the "Scanning History" details. Information such as "Scan Audits" or "Basic" scanning details will be obtained.

– "Operation History", will retrieve the "Operation History" from the "Internal Module/ Production Sequence" for when a job was started and completed. OEE information can also be obtained.

– "Cycle History", will retrieve the "Cycle" information such as PO, Lead Time, Transit Time, Price, etc.. It is similar to the "Cross Tab History" report. It contains more information related to each specific card cycle.

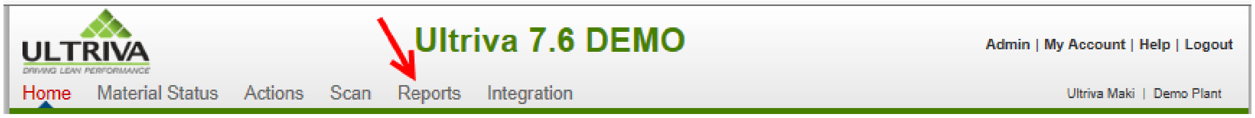
There are 3 types of "Custom Reports" generated from Ultriva.

- ***Tabular***
- ***Group Details***
- ***Group Summary***

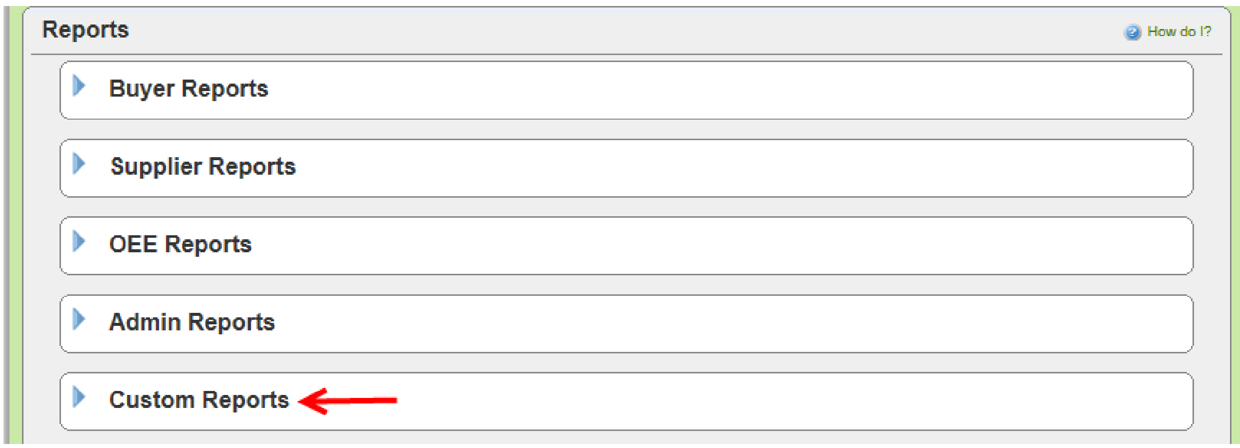
We will cover all 3 types of "Custom Reports" in this guide.

Tabular – Kanban Active Cards

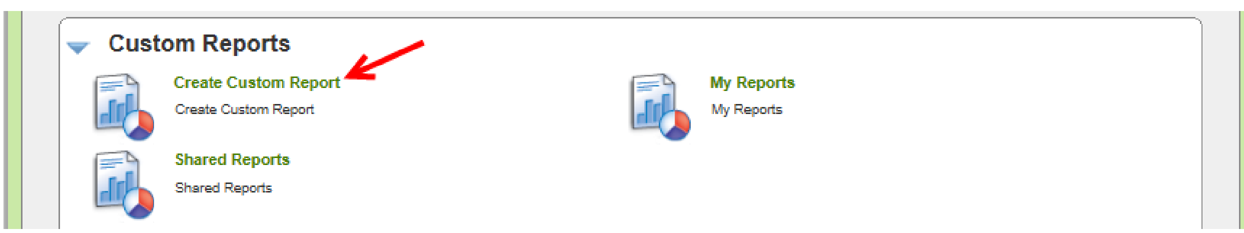
To **navigate** to the "**Custom Reports**", **click** on "**Reports**"



Click on "**Custom Reports**"

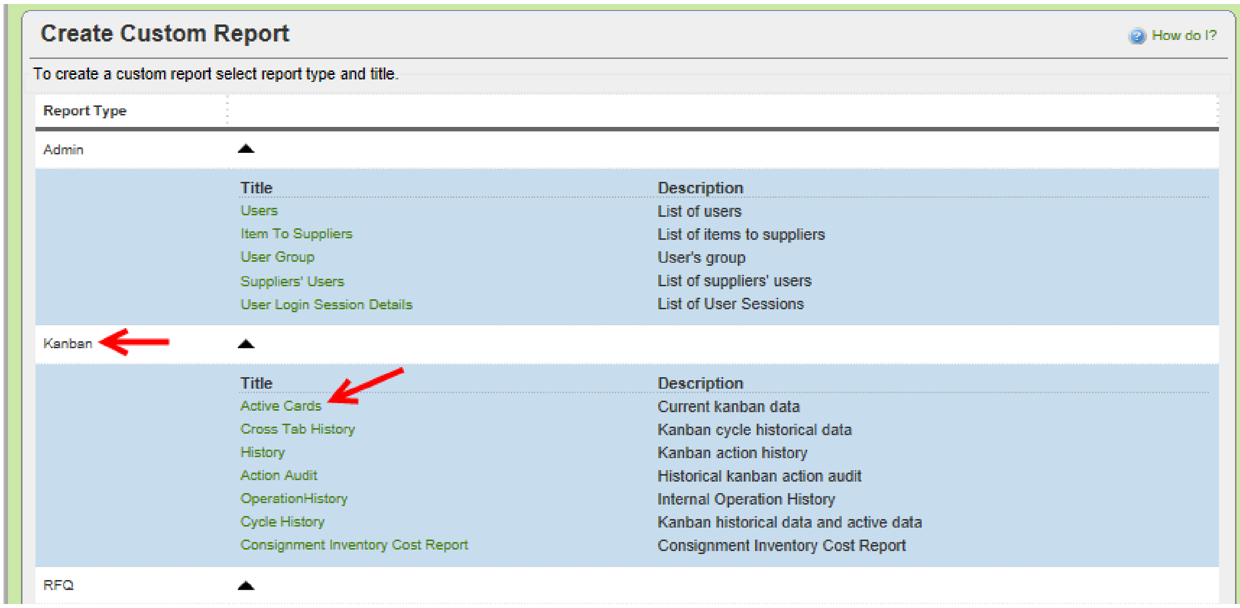


Click on "**Create Custom Reports**"

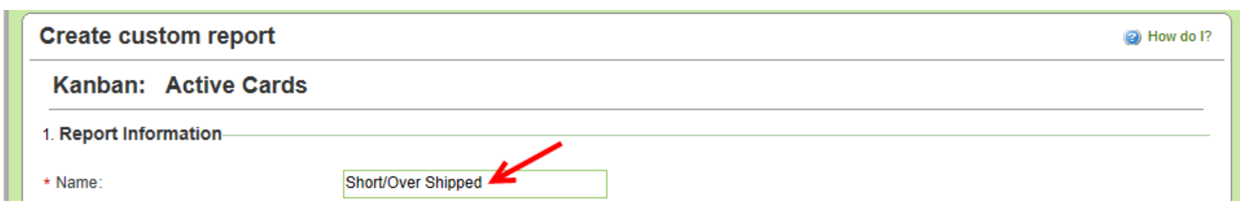


Quick Tip – The "Tabular" report we will create for this example, will be for cards shipped outside of the "quantity on the card" tolerance.

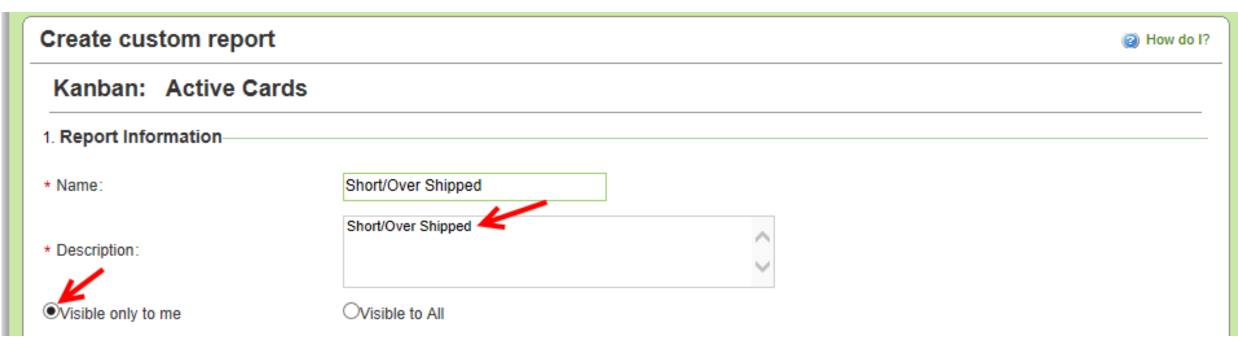
Select the "**Report Type**" *This Example*: In the **"Kanban"** field **selections, Click** on **"Active Cards"**



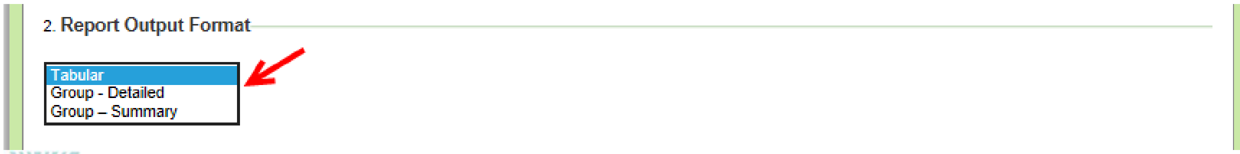
Enter the "**Name**" of the "**Report**"



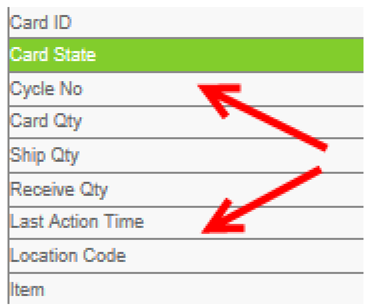
Enter a "**Description**" for the "**Report**" and **select** an **option for viewing** the "**Report**"



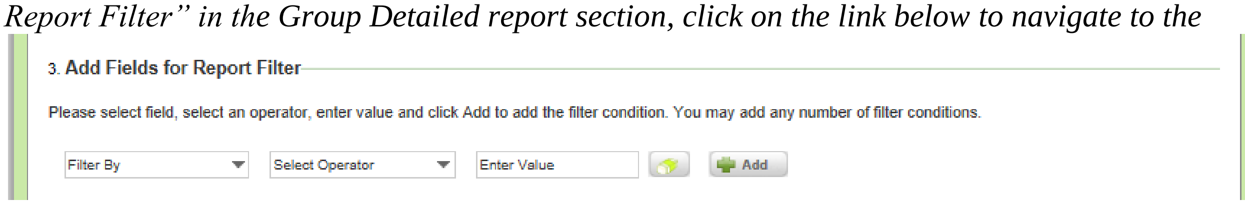
Click on the **dropdown arrow** in the "**Report Output Format**" and **select** a "**Report Output**" *This Example*: **Select "Tabular"**



Quick Tip – Fields can be added to the "Report" using the "Add Fields for Report Filter" Below are the "Actions" for the filters that can be selected.

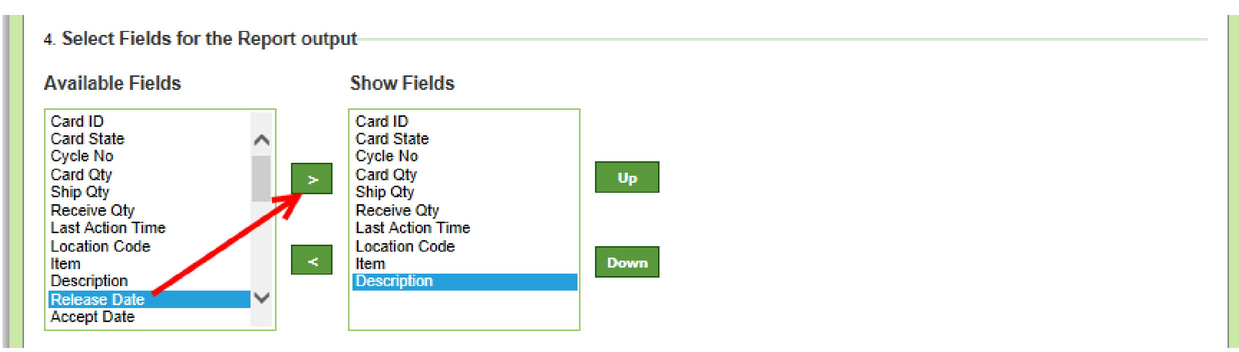


This Example: **We will not use this filter**. *For detailed instructions to set up the "Add Fields for Report Filter" in the Group Detailed report section, click on the link below to navigate to the*

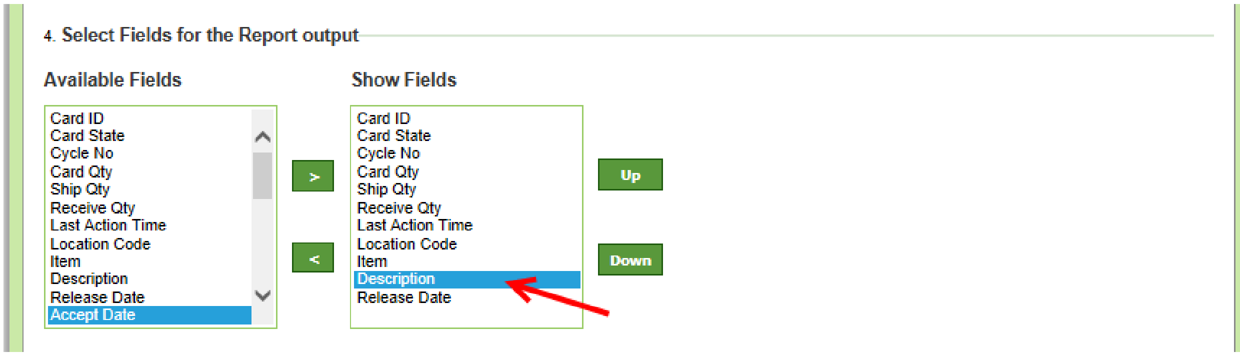


Report Filter

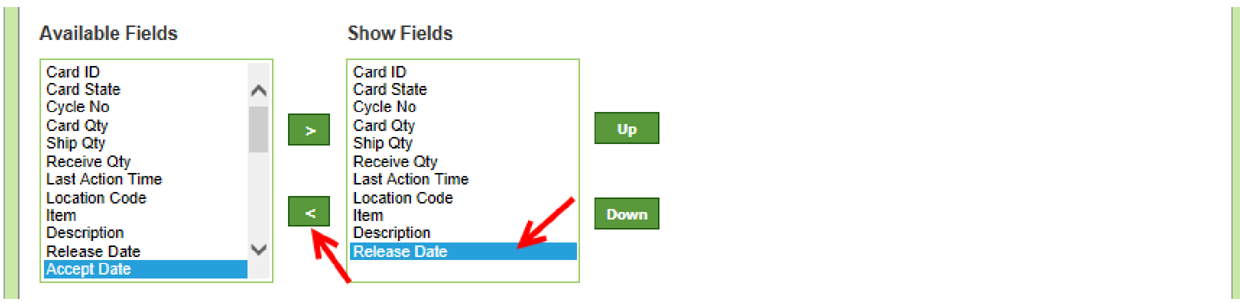
To "**Select Fields for the Report Output**", **click** on an "**Available Fields**" selection. **Click** on the "**Greater than**" button to **move** the **selection** to "**Show Fields**"



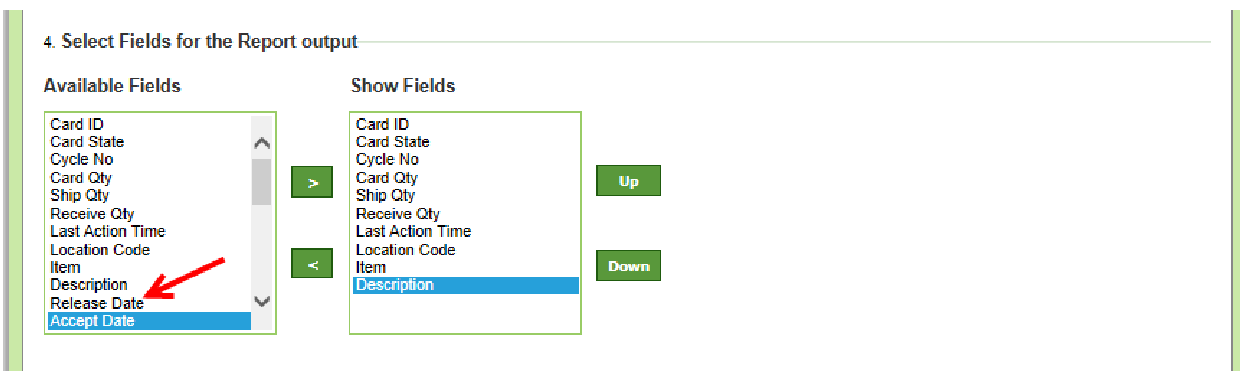
The **selection** has **moved.**



To **move** a **selection** from the "**Show Fields**" to the "**Available Fields**", **click** on the **selection** to move. **Click** on the "**Less than**" button.

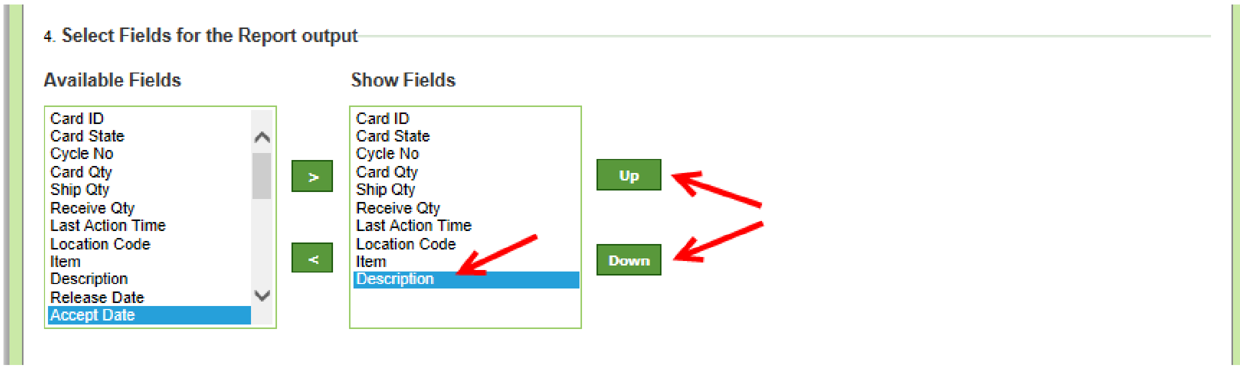


The **selection** has **moved.**



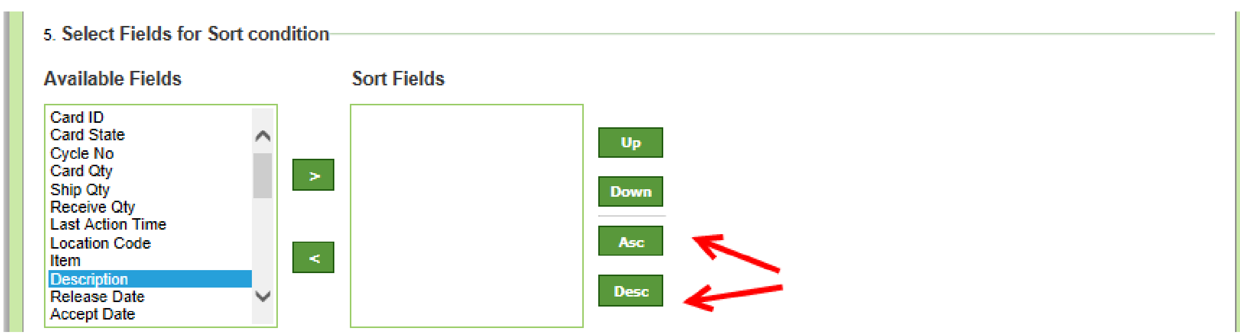
Quick Tip – The order of the "Show Fields" selections will be the order you see for the output on the report.

To **change the order** of the selections in "**Show Fields**", **click** on a **selection to move. Click** on the "**Up**" or "**Down**" buttons.

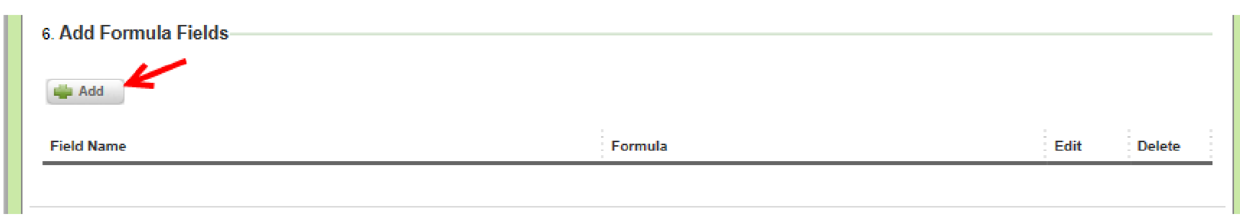


Quick Tip – The order of the "Show Field" selections, by default, is in "Ascending" order. To change the order to "Descending", click on the "Desc" button.

*"***Select Fields for Sort Condition***" Follow the instructions on the previous 2 pages for moving the selections from the "Available Fields" to the Sort Fields. For this example we will leave the "Sort Fields" blank. This is left empty as we are looking at "Short/Over Shipments" and have added a formula in the next step.*



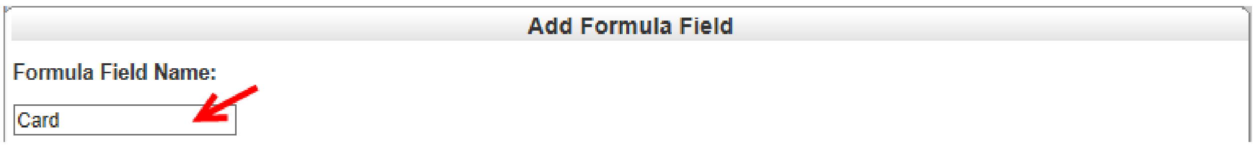
In the "**Add Formula Fields**" **click** on the "**ADD**" button



Quick Tip – There is an “Ultriva Expression Evaluator Cheat Sheet” located in the “Ultriva Help Portal”. Click on the link below for access to this sheet.

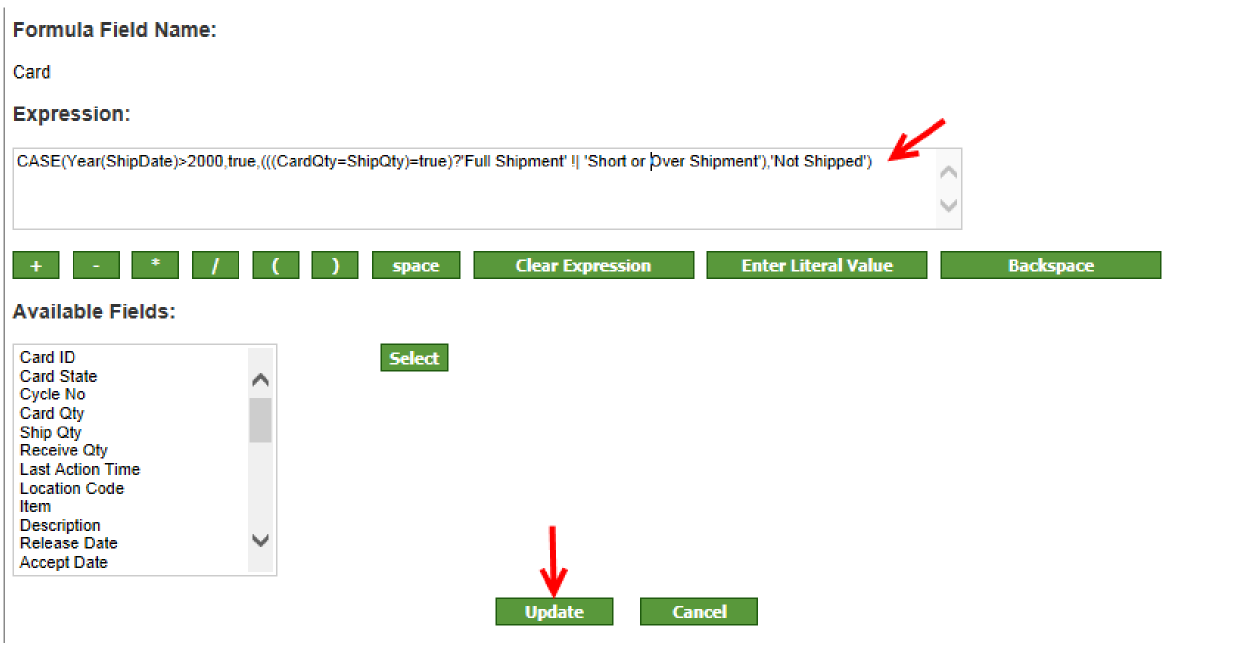
http://help.ultrivalms.com/CheatSheets/UltrivaExpressionEvalCheatSheet.pdf

Enter the “**Formula Field Name**”

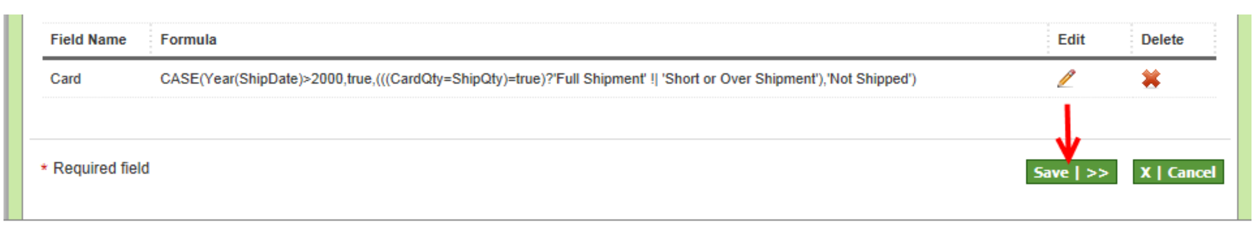


Enter the “**Expression**”. **Click** on the “**Add**” button. The *example is below*.

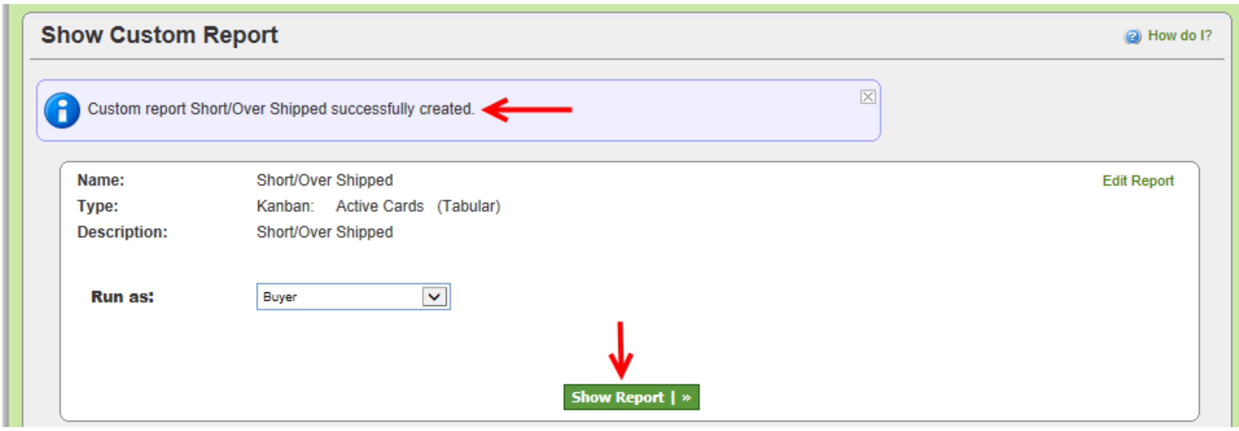
CASE(Year(ShipDate)>2000,true,(((CardQty=ShipQty)=true)?'Full Shipment' !| 'Short or Over Shipment'),'Not Shipped')



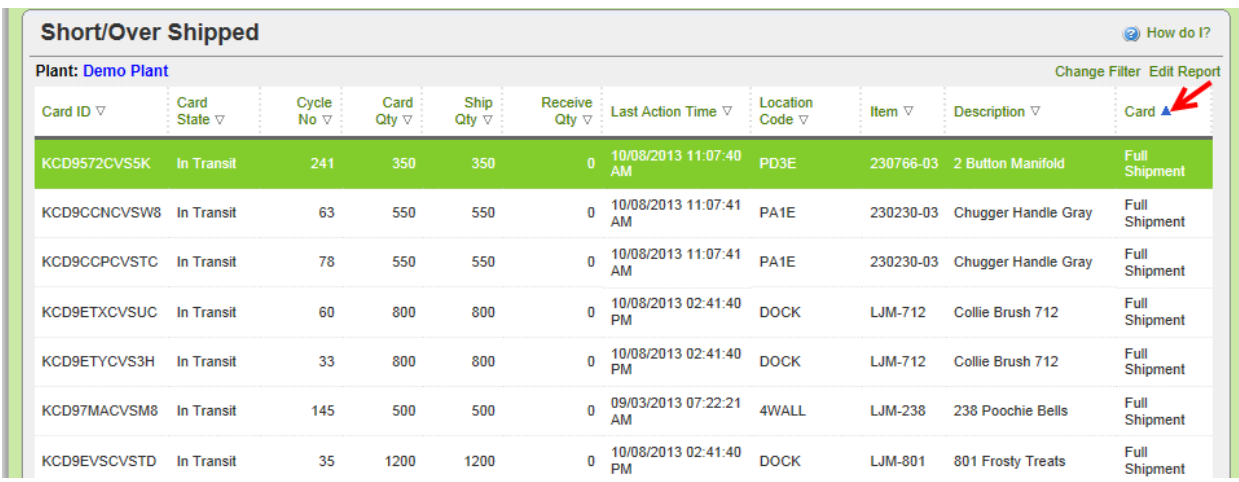
Click on the “**Save**” button



The "**Custom Report Short Shipments Successfully Created**". **Click** on the "**Show Report**" button to **view** your **report**.

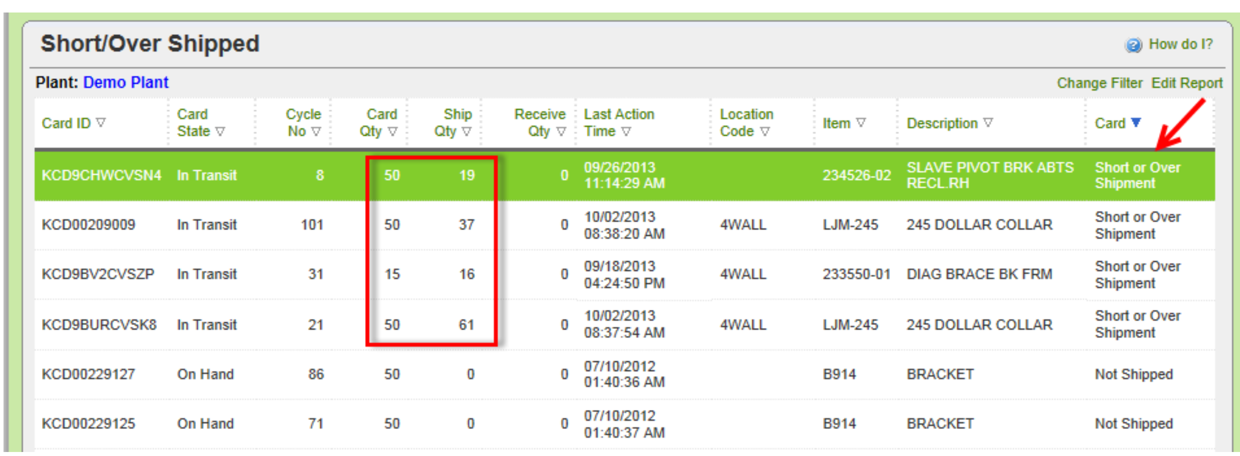


The "**Report**" **appears**. **Click** on the "**Triangle**" in the "**Card**" column to **re-sort** from "**Full Shipment**" to "**Short or Over Shipped**"



Card ID ▽	Card State ▽	Cycle No ▽	Card Qty ▽	Ship Qty ▽	Receive Qty ▽	Last Action Time ▽	Location Code ▽	Item ▽	Description ▽	Card ▲
KCD9572CVS5K	In Transit	241	350	350	0	10/08/2013 11:07:40 AM	PD3E	230766-03	2 Button Manifold	Full Shipment
KCD9CCNCVSW8	In Transit	63	550	550	0	10/08/2013 11:07:41 AM	PA1E	230230-03	Chugger Handle Gray	Full Shipment
KCD9CCPCVSTC	In Transit	78	550	550	0	10/08/2013 11:07:41 AM	PA1E	230230-03	Chugger Handle Gray	Full Shipment
KCD9ETXCVSUC	In Transit	60	800	800	0	10/08/2013 02:41:40 PM	DOCK	LJM-712	Collie Brush 712	Full Shipment
KCD9ETYCVS3H	In Transit	33	800	800	0	10/08/2013 02:41:40 PM	DOCK	LJM-712	Collie Brush 712	Full Shipment
KCD97MACVSM8	In Transit	145	500	500	0	09/03/2013 07:22:21 AM	4WALL	LJM-238	238 Poochie Bells	Full Shipment
KCD9EVSCVSTD	In Transit	35	1200	1200	0	10/08/2013 02:41:40 PM	DOCK	LJM-801	801 Frosty Treats	Full Shipment

The **column** is now **sorted** by "**Short or Over Shipments**"

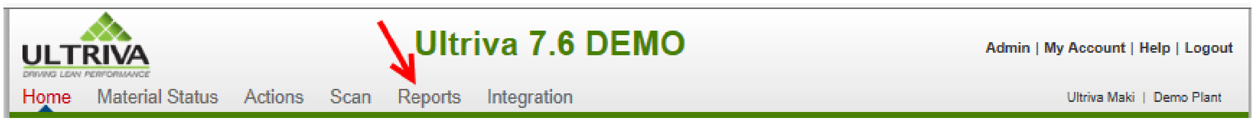


Card ID ▽	Card State ▽	Cycle No ▽	Card Qty ▽	Ship Qty ▽	Receive Qty ▽	Last Action Time ▽	Location Code ▽	Item ▽	Description ▽	Card ▼
KCD9CHWCVSN4	In Transit	8	50	19	0	09/26/2013 11:14:29 AM		234526-02	SLAVE PIVOT BRK ABTS RECL RH	Short or Over Shipment
KCD00209009	In Transit	101	50	37	0	10/02/2013 08:38:20 AM	4WALL	LJM-245	245 DOLLAR COLLAR	Short or Over Shipment
KCD9BV2CVSZP	In Transit	31	15	16	0	09/18/2013 04:24:50 PM	4WALL	233550-01	DIAG BRACE BK FRM	Short or Over Shipment
KCD9BURCVSK8	In Transit	21	50	61	0	10/02/2013 08:37:54 AM	4WALL	LJM-245	245 DOLLAR COLLAR	Short or Over Shipment
KCD00229127	On Hand	86	50	0	0	07/10/2012 01:40:36 AM		B914	BRACKET	Not Shipped
KCD00229125	On Hand	71	50	0	0	07/10/2012 01:40:37 AM		B914	BRACKET	Not Shipped

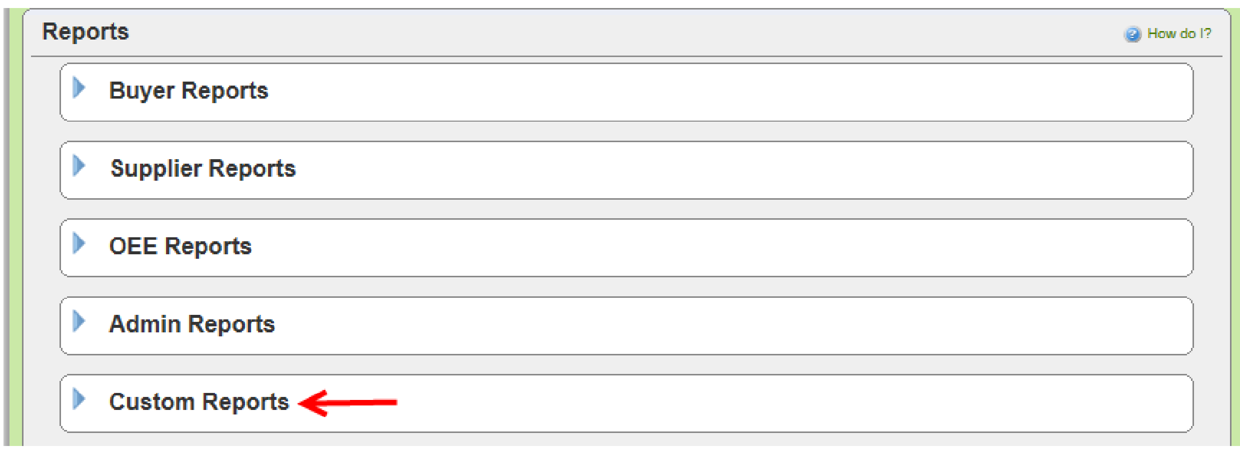
Group Detailed Report

Quick Tip – In this example we will look at a "Kanban History" report for "Recalled" cards. There may be "Plants" not integrated, and may need this information to make adjustments to the ERP.

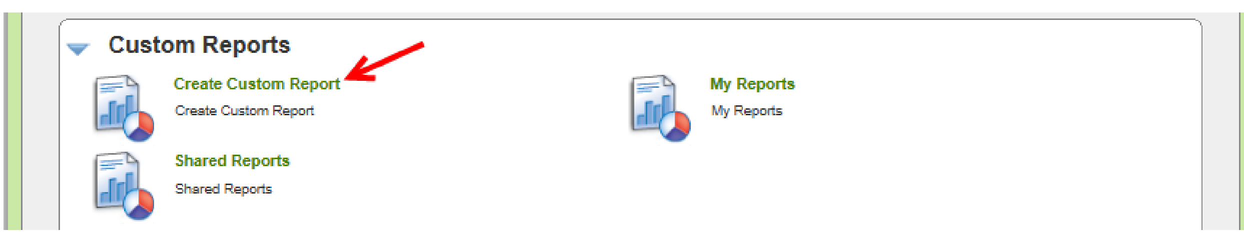
To **navigate** to the "**Custom Reports**", **click** on "**Reports**"



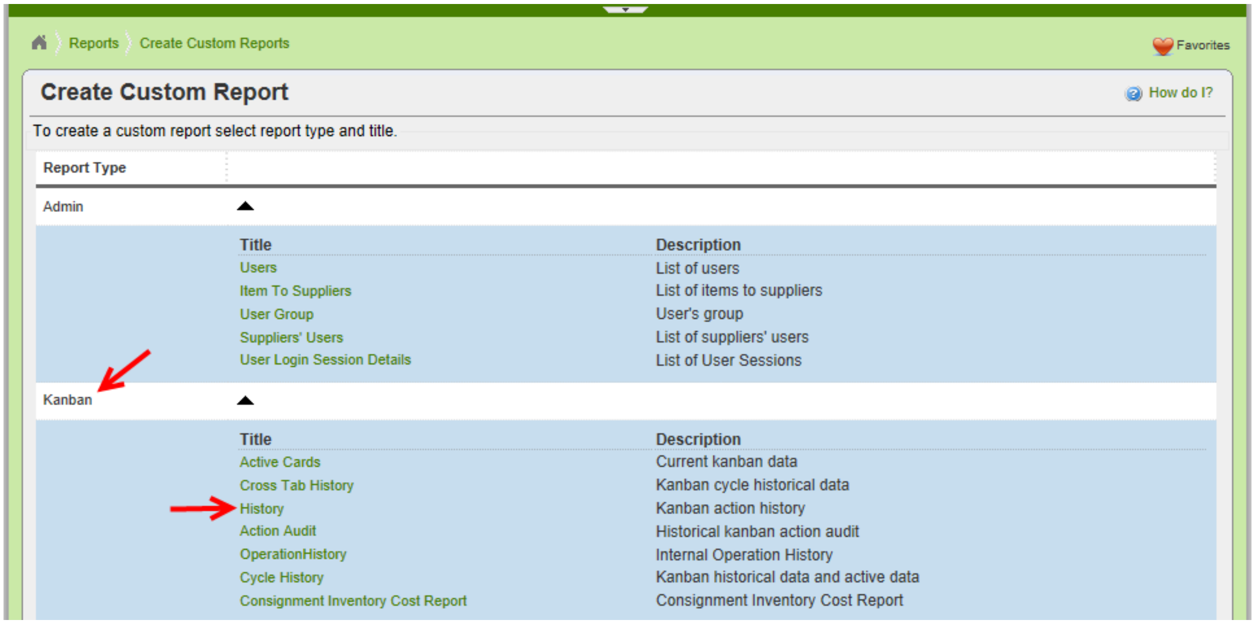
Click on "**Custom Reports**"



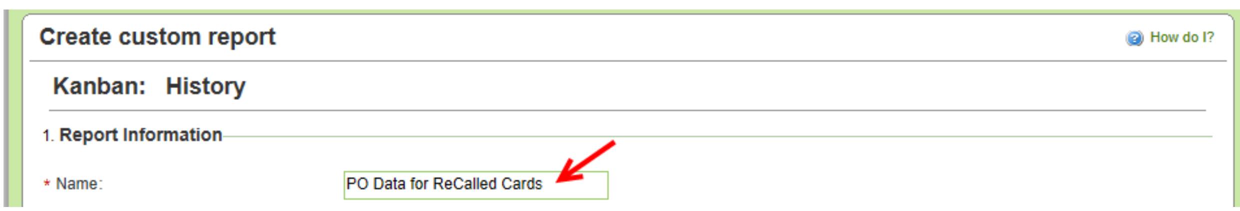
Click on "**Create Custom Reports**"



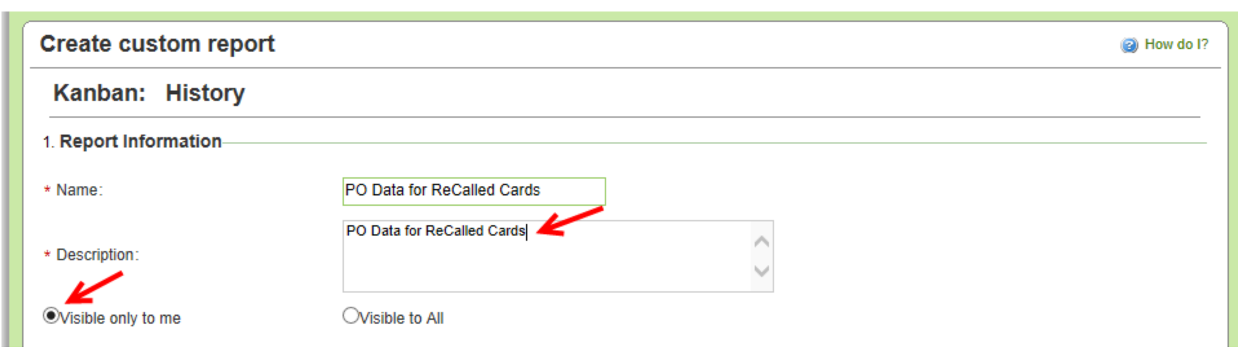
In the "**Kanban** "fields, **click** on "**History**".



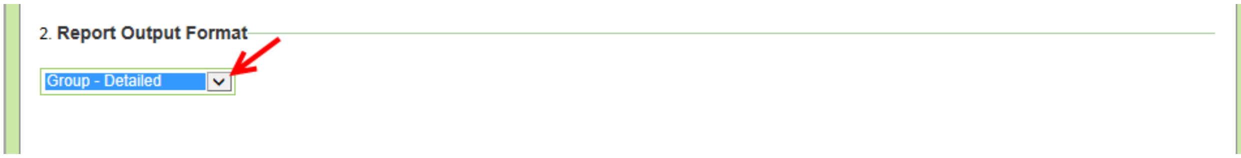
Enter the "**Name**" of the "**Report**"



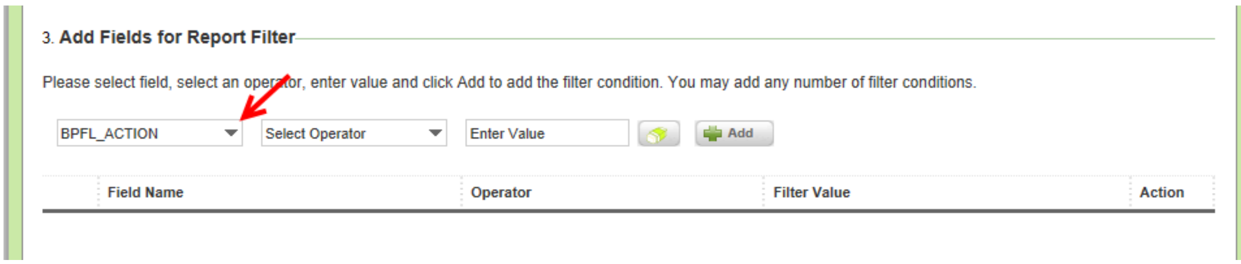
Enter a "**Description**" for the "**Report**". **Select** an **option for viewing** the "**Report**"



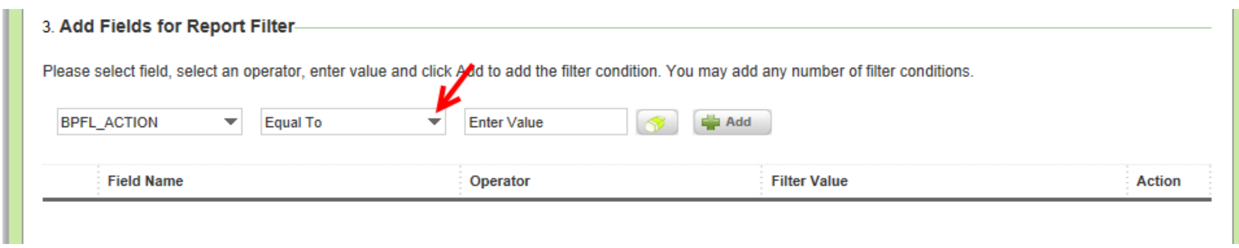
Click on the **dropdown arrow** in the "**Report Output Format**" field, **select** "**Group – Detailed**"



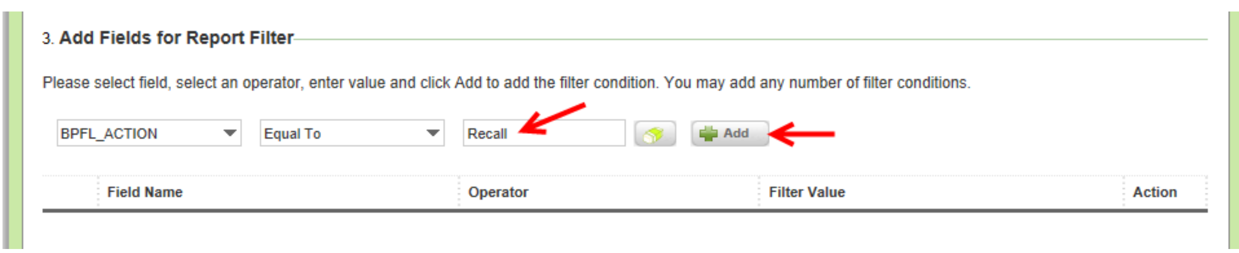
In the "**Add Fields for Report Filter**" **click** on the **dropdown arrow** in the "**Filter By**" field and **select** "**BPFL_ACTION**"



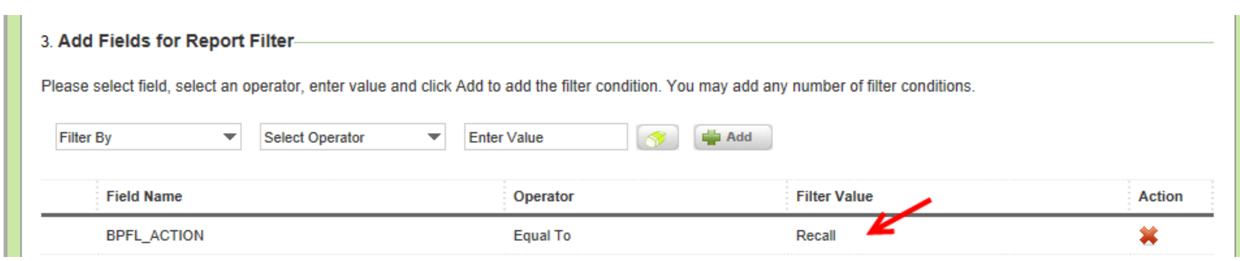
Click on the **dropdown arrow** in the "**Select Operator**" field and **select** "**Equal To**"



In the "**Enter Value**" field, **type** "**Recall**". **Click** on the "**Add**" button.



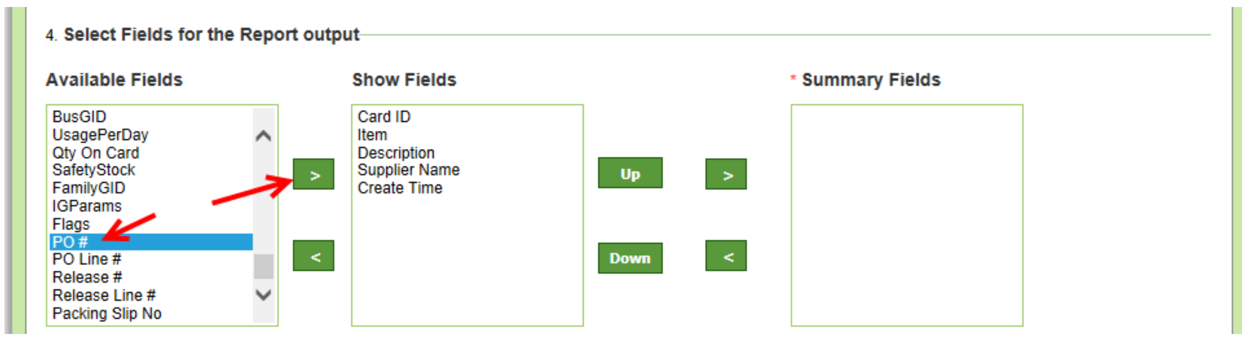
The "**Filter**" **appears**.



Optional: If **navigated from** the "**Tabular Report, Report Filter**", **click** on the **link below** to **return**.

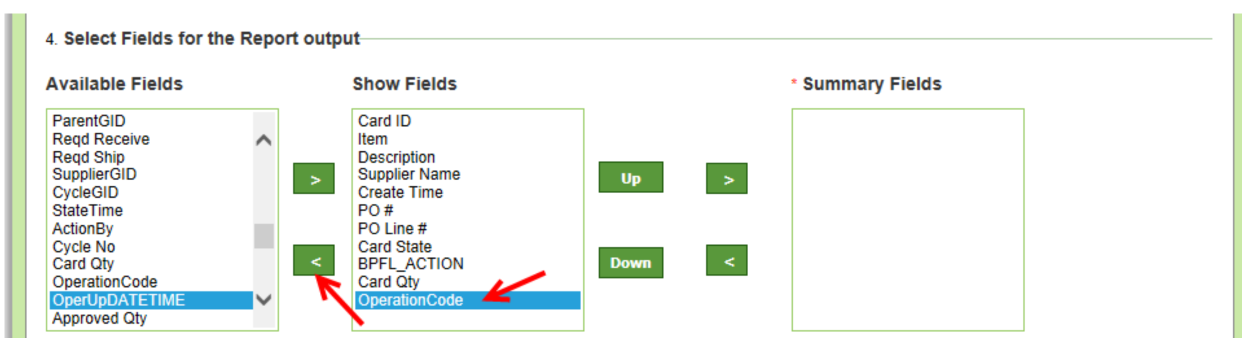
Tabular Report, Report Filter

To "**Select Fields for the Report Output**", **click** on an "**Available Fields**" **selection. Click** on the "**Greater than**" button to **move** the **selection** to "**Show Fields**". *The selected fields are the fields that will appear on the Report.*

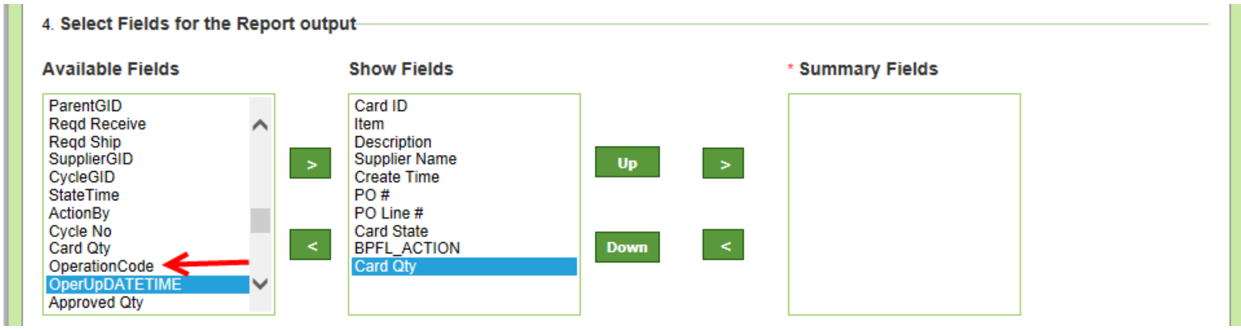


The **selection** has **moved.** *Below are the selections in the "Show Fields" for this "Report"*

To **move** a **selection** from the "**Show Fields**" back to the "**Available Fields**", **click** on the **selection** to move. **Click** on the "**Less than**" button.

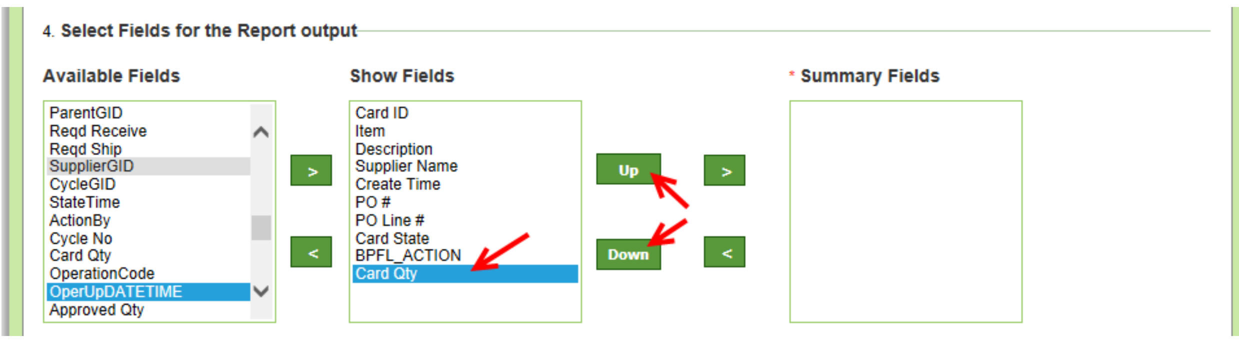


The **selection** has **moved back.**



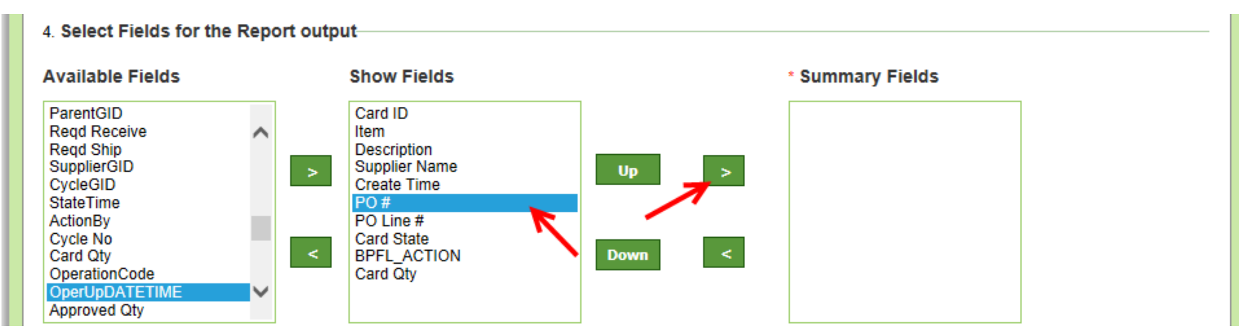
Quick Tip – The order of the "Show Field" selections will be the order for the output on the report.

To **change the order** of the selections in "**Show Fields**", **click** on a "**Show Fields**" **selection. Click** on the "**Up**" or "**Down**" buttons.



Quick Tip – "Summary Fields" are required when creating a "Grouping" report. For this example we will select PO #.

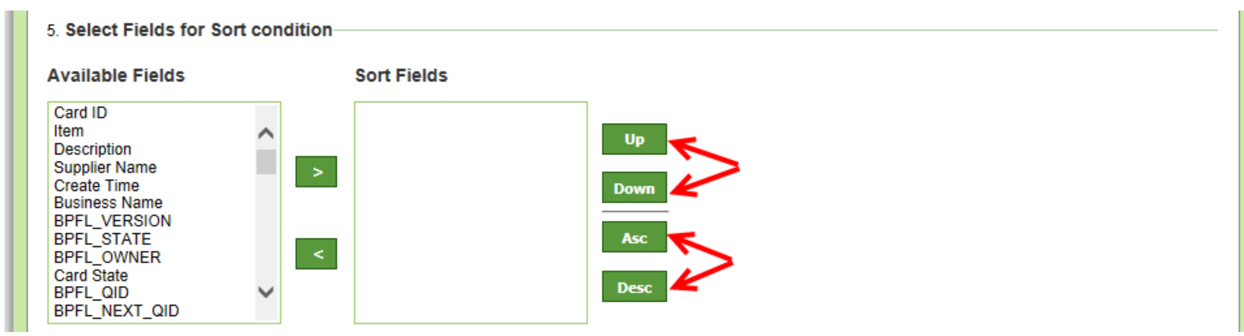
In "**Show Fields**" **click** on "**PO#**" to **select** this option. **Click** on the **greater than symbol** to **move** the **selection** to the "**Summary Fields**"



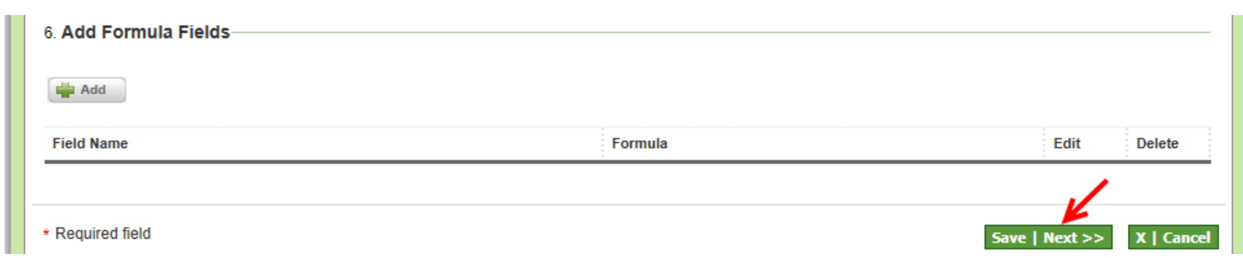
The **selection** has **moved**.

Quick Tip – The order of the "Show Field" selections, by default, is in "Ascending" order. To change the order to "Descending", click on the "Desc" button.

Optional*: "***Select Fields for Sort Condition*" Follow the instructions above for moving the selections from the "Available Fields" to the Sort Fields. For this example we will leave the "Sort Fields" blank.*

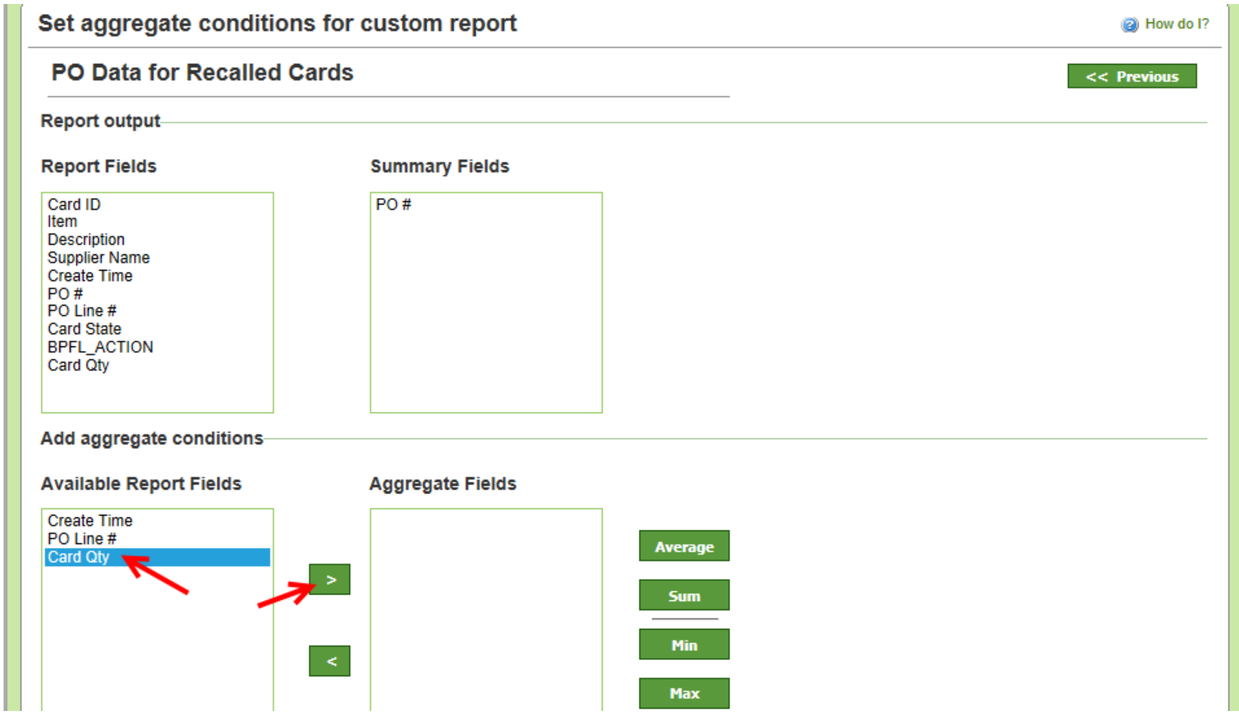


Click on the "**Save|Next**>>" button.

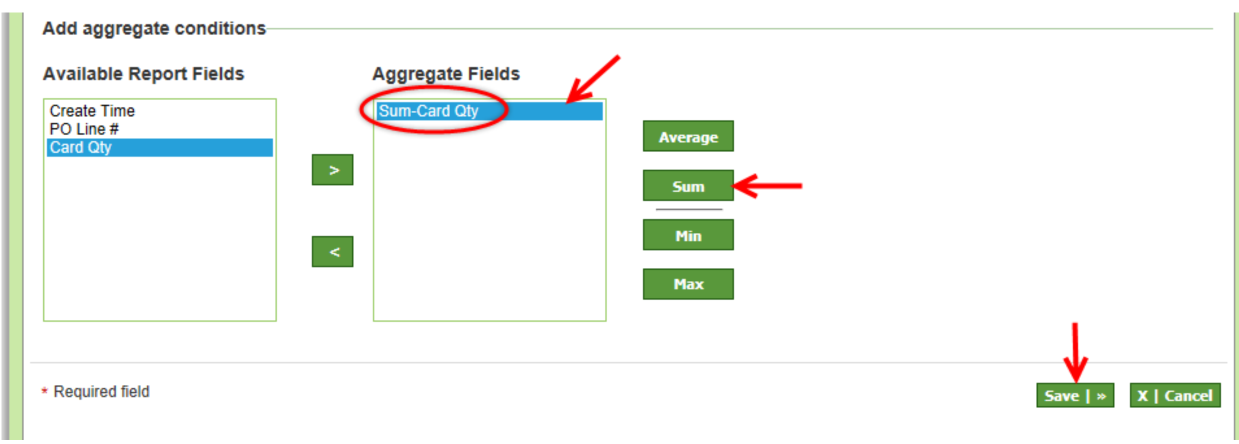


Quick Tip – The "Aggregate Conditions" can now be "Selected" for this "Report". Aggregate: "A whole formed by combining several elements".

In this example we want to capture the Card Qty.
In the "**Add Aggregate Conditions, Available Report Fields**", click on "**CardQty**" **Click** on the **greater than sign** to **move** the **selection** to "**Aggregate Fields**"



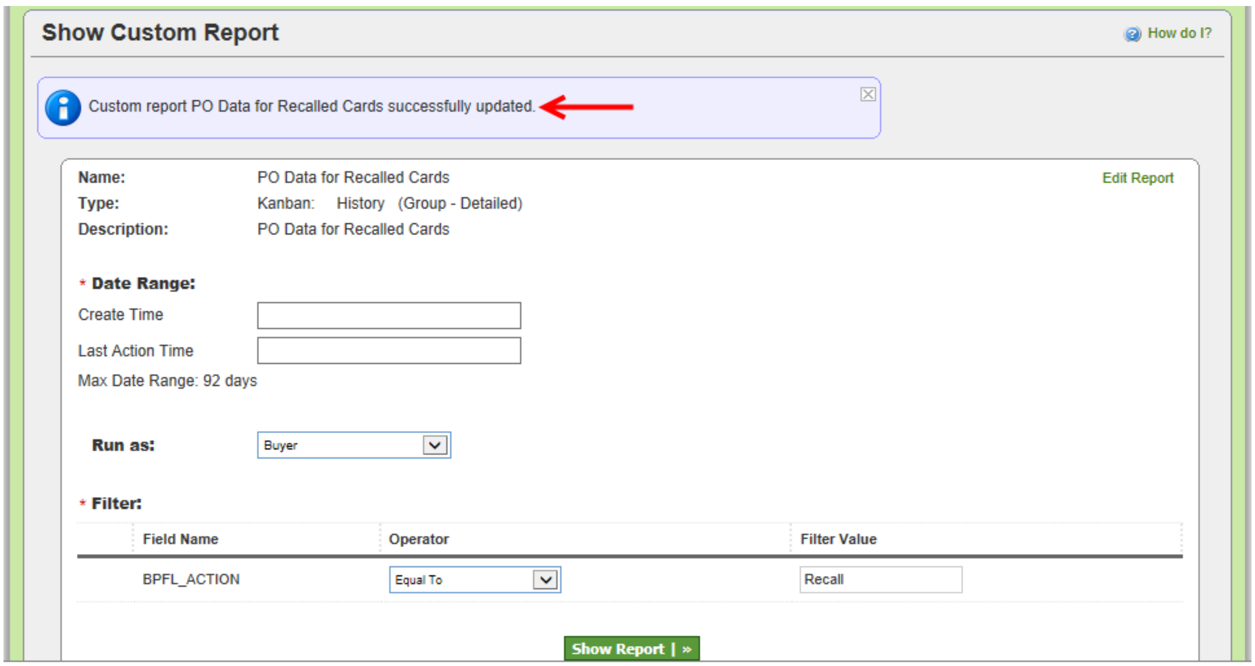
Click on the **selection** in the "**Aggregate Fields**". C**lick** on one of the **button**s labeled "**Average, Sum, Min or Max**". This **selection** will be **added to** the **selection** that was **moved**. **Click** on the "**Save**" button
In this example we will select "Sum", the "Sum" of all of the "Card Quantities". In the "Aggregate Fields" you will now see Sum-Card Qty.



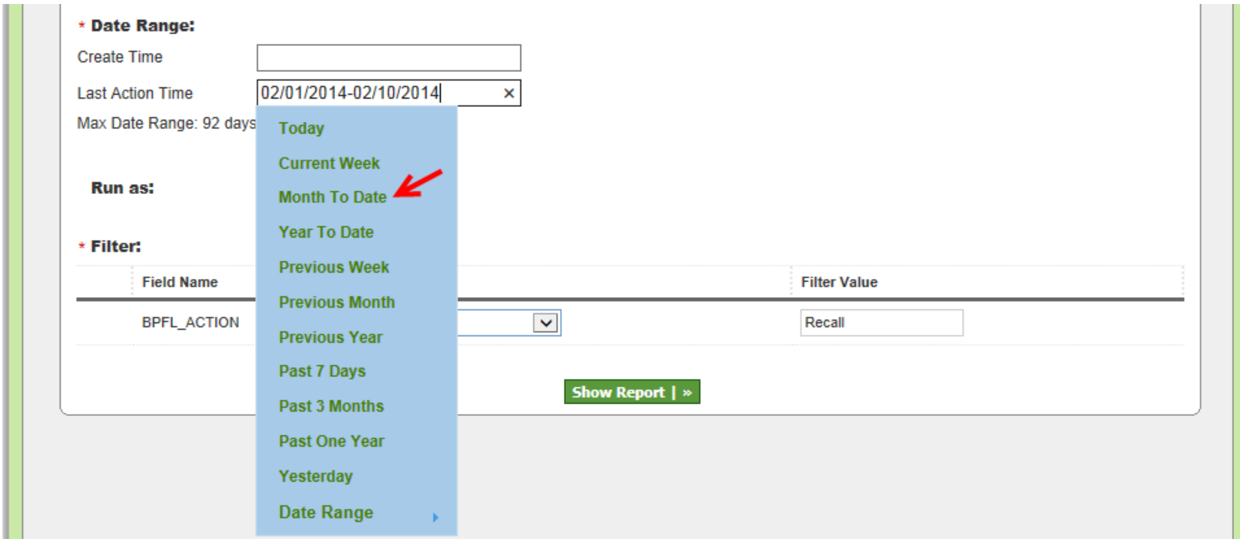
Optional: If **navigated** from the "**Group Summary Report, Aggregate Conditions**", **click** on the **link below** to **return** to that page.

Return to the Group Summary Report – Aggregate Conditions Report

"**Custom Report PO Data for Recalled Cards Added Successfully**"

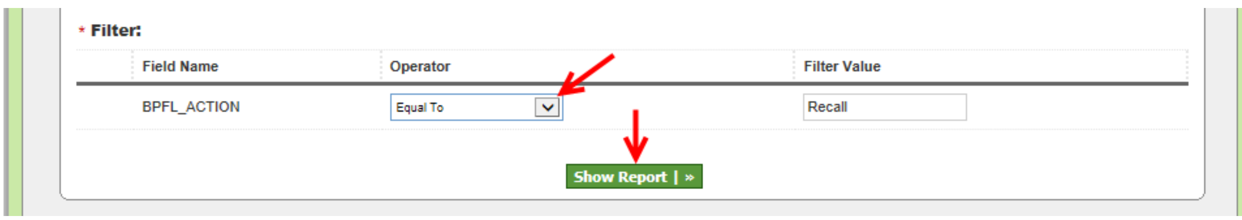


Click in a "**Date Range**" either "**Create Time**" or "**Last Action Time**" and a **dropdown box** will **appear**. **Make** a **selection**. *In this example, "Month to Date" will be selected in the "Last Action Time" field.*



Quick Tip – The "Filter" settings can be changed by clicking on the drop down arrow in the "Operator" field and selecting a new filter.

In this example the "Filter" will not be changed. **Click** on the "**Show Report**" button.



The “**Report**” **appears** and is “**Grouped**” by the “**PO #**” for all “**Recalled**” cards for the **selected period**.

PO Data for Recalled Cards

How do I?

Plant: Demo Plant, BPFL_ACTION Equal To: Recall, Last Action Time: 02/01/2014-02/10/2014

Change Filter Edit Report

PO #	Card ID	Item	Description	Supplier Name	Create Time	PO Line #	Card State	BPFL_ACTION	Card Qty
	KCD00203735	176066-01	NAT'L DYE WORKS CORDURA+ SMOKE	Tibetan Terrier Inc	01/29/2007	0	Recalled	Recall	250
Total 1									**250.0**
92618									
	KCD9F5JCVS2F	223544-01	REAR CROSS ANGLE-MTG.HOLES BAS	Whippets Inc	03/11/2013	0	Recalled	Recall	25
	KCD9F5LCVSYK	223544-01	REAR CROSS ANGLE-MTG.HOLES BAS	Whippets Inc	03/11/2013	0	Recalled	Recall	25
	KCD9E82CVSM3	223544-01	REAR CROSS ANGLE-MTG.HOLES BAS	Whippets Inc	11/02/2012	0	Recalled	Recall	25
Total 3									**75.0**
P062340									
	KCD00206026	180006-161	BINDING, BLK CLOTH,1.25IN WIDE	St. Bernard Inc	02/07/2007	0	Recalled	Recall	600
Total 1									**600.0**
P064843									
	KCD00217327	176076-13	GARNETT 1460 CARPET THERMAL	Redbone Coonhound Inc	07/02/2007	0	Recalled	Recall	50
Total 1									**50.0**
P090107									
	KCD00174775	180053-01	WIRE,STEEL 11GA (.1205)X12"	Rat Terriers Inc	05/18/2006	0	Recalled	Recall	1000
Total 1									**1,000.0**

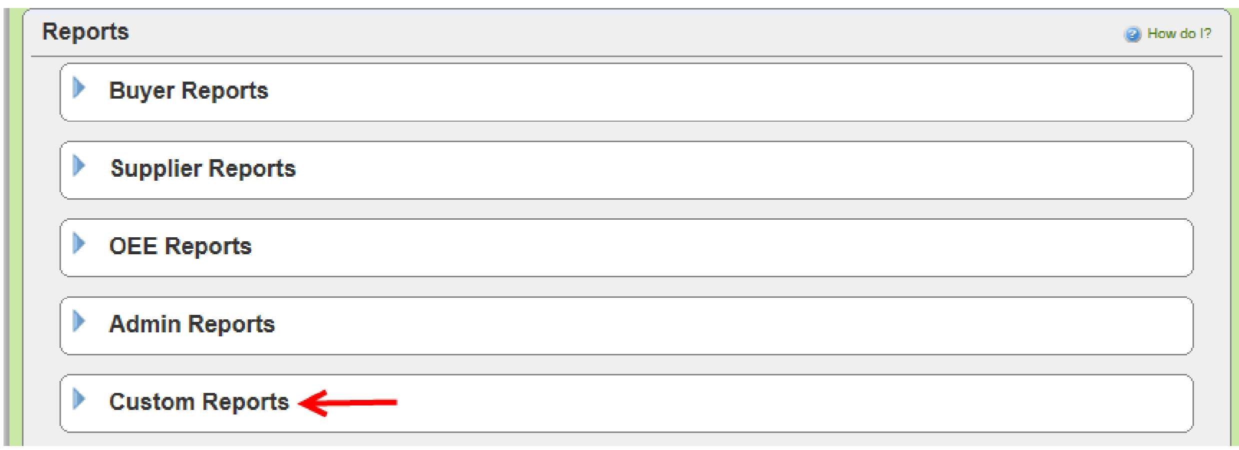
1 to 5 of 5

Group Summary Report

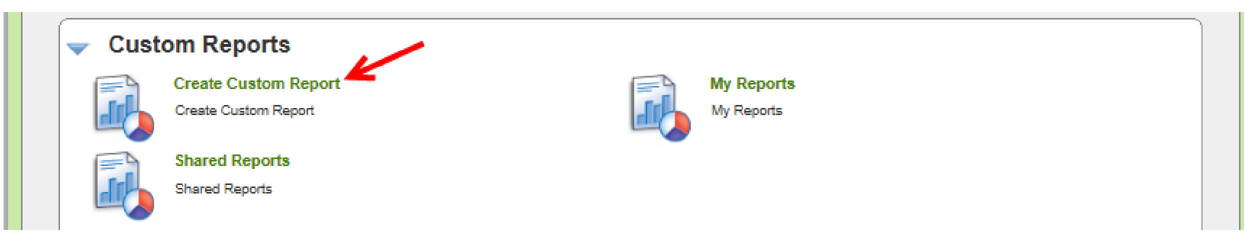
Quick Tip – In this example we will look at a "Kanban History" report for "Shipped" cards.

To **navigate** to the "**Custom Reports**", **click** on "**Reports**"

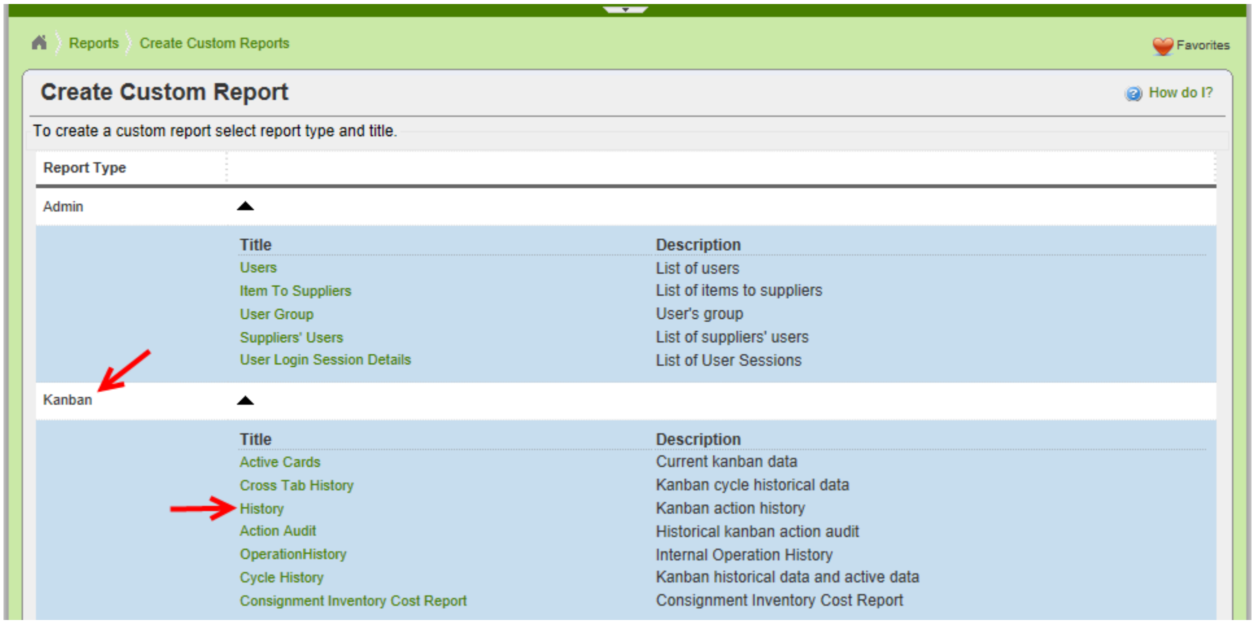
Click on "**Custom Reports**"



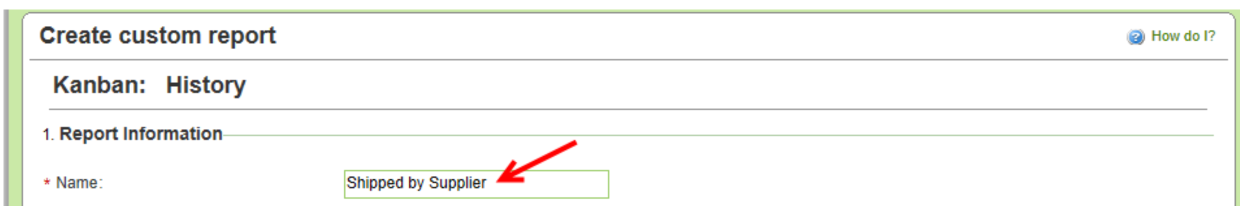
Click on "**Create Custom Reports**"



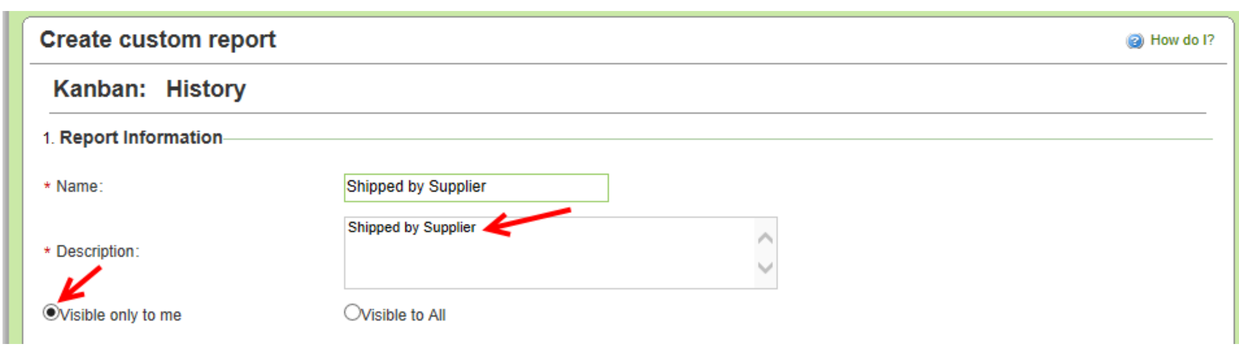
In the "**Kanban** "fields, **click** on "**History**".



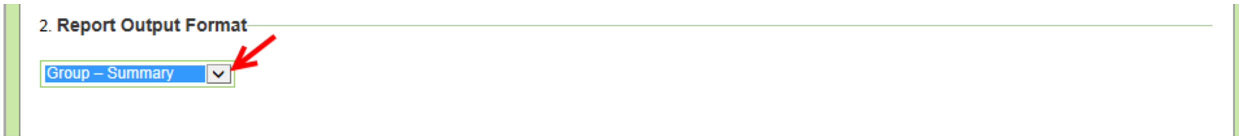
Enter the "**Name** of the "**Report**"



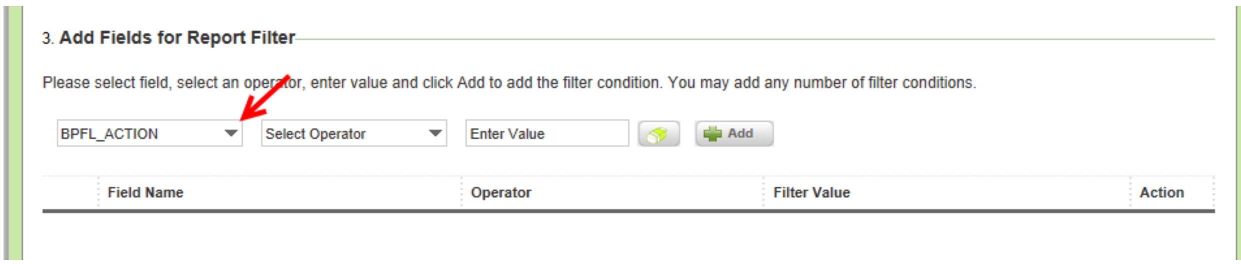
Enter a "**Description**" for the "**Report**" and **select** an **option for viewing** the "**Report**"



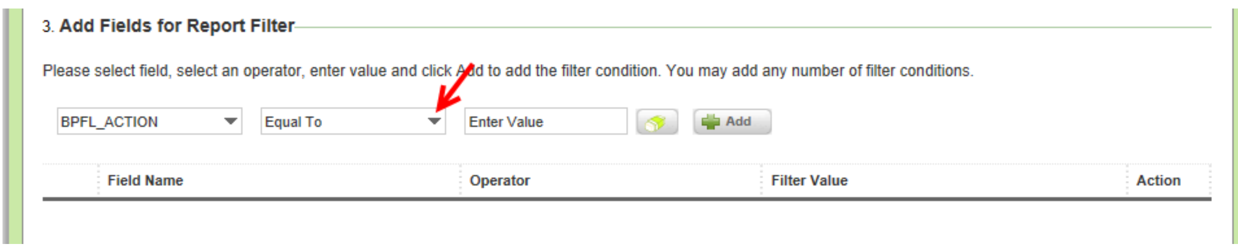
Click on the **dropdown arrow** in the "**Report Output Format**" field, **select** "**Group – Summary**"



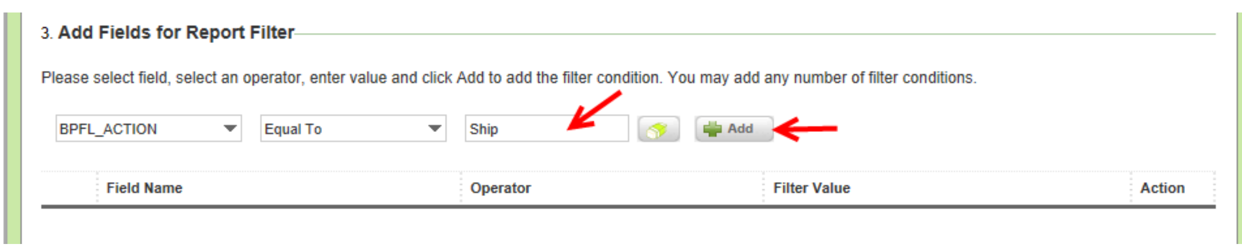
In the "**Add Fields for Report Filter**" **click** on the **dropdown arrow** in the "**Filter By**" field and **select** "**BPFL_ACTION**"



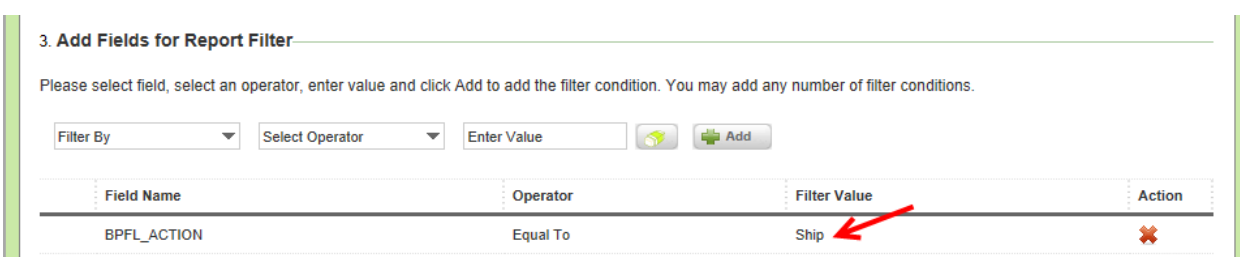
Click on the **dropdown arrow** in the "**Select Operator**" field and **select** "**Equal To**"



In the "**Enter Value**" field, **type** in "**Ship**". **Click** on the "**Add**" button.

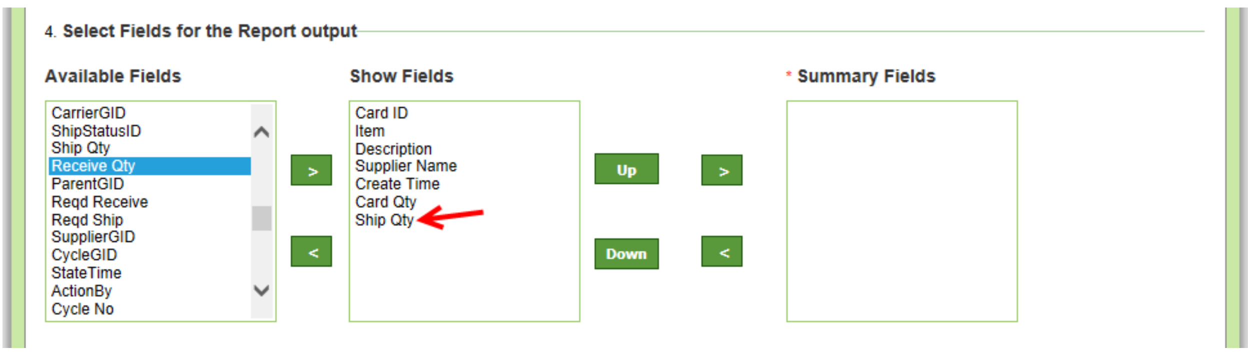


The "**Filter**" **appears**.



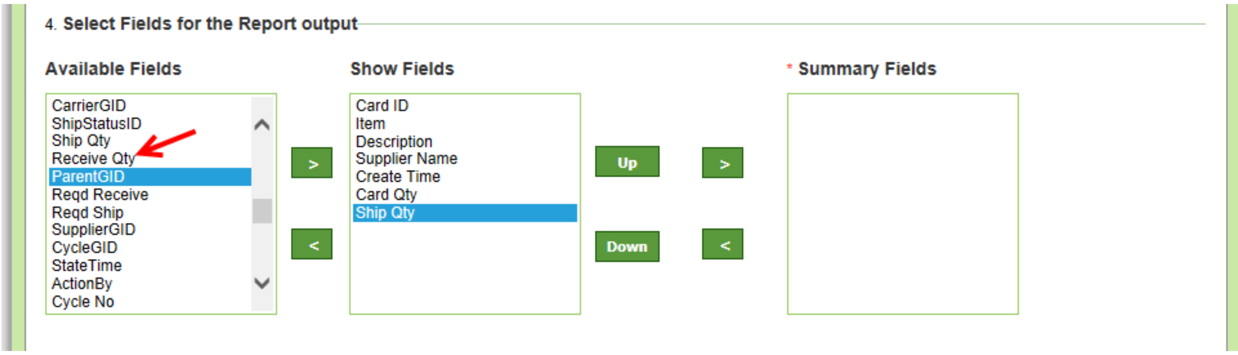
To “**Select Fields for the Report Output**” **click** on your **selection** and then **click** on the “**Greater than**” button to **move** the **selection** to “**Show Fields**”. *The selected fields are the fields that will appear on the Report.*

The **selection** has **moved.** *Below are the selections in the “Show Fields” for this “Report”*



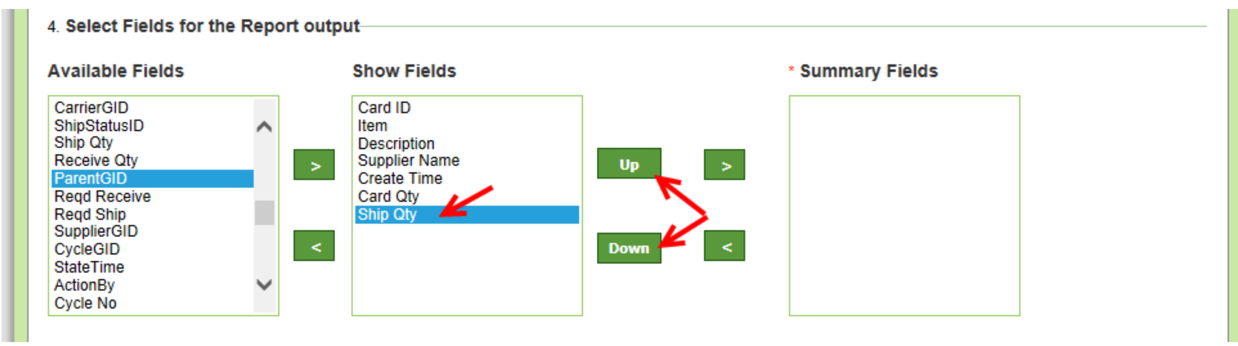
To **move** a **selection** from the “**Show Fields**” back to the “**Available Fields**”, **click** on the **selection** to move and then **click** on the “**Less than**” button.

The **selection** has **moved back.**



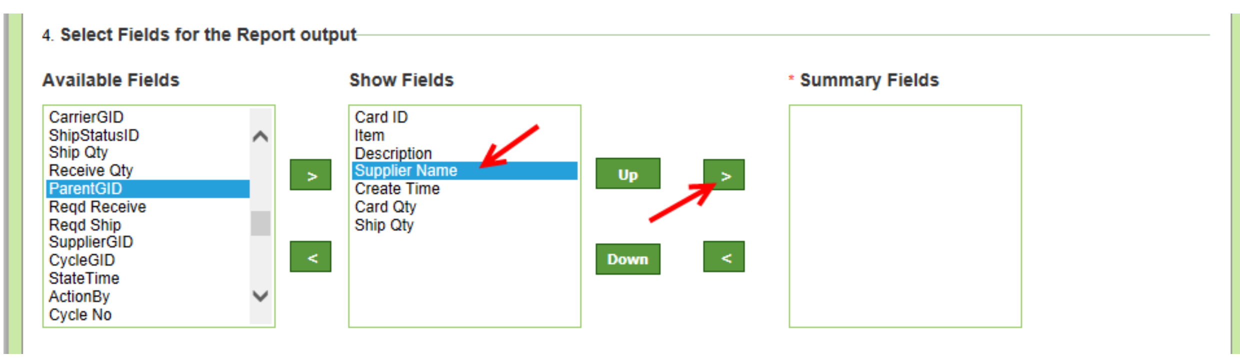
Quick Tip – The order of the "Show Field" selections will be the order you see for the output on the report.

Optional: To **change the order** of the selections in "**Show Fields**", **click** on a **selection** and then **click** on the "**Up**" or "**Down**" buttons.

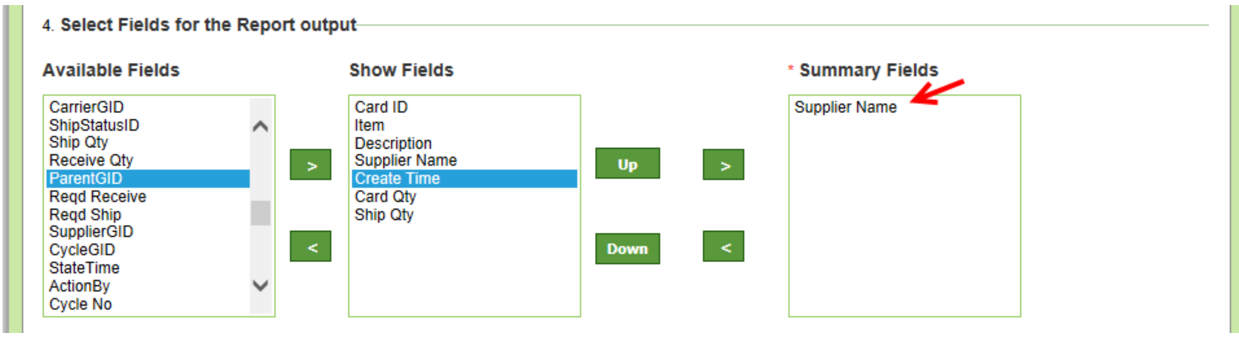


Quick Tip – "Summary Fields" are required when creating a "Grouping" report. For this example we will select Supplier Name.

In "**Show Fields**" **click** on "**Supplier Name**" to **select** this option. **Click** on the **greater than symbol** to **move** the **selection** to "**Summary Fields**"



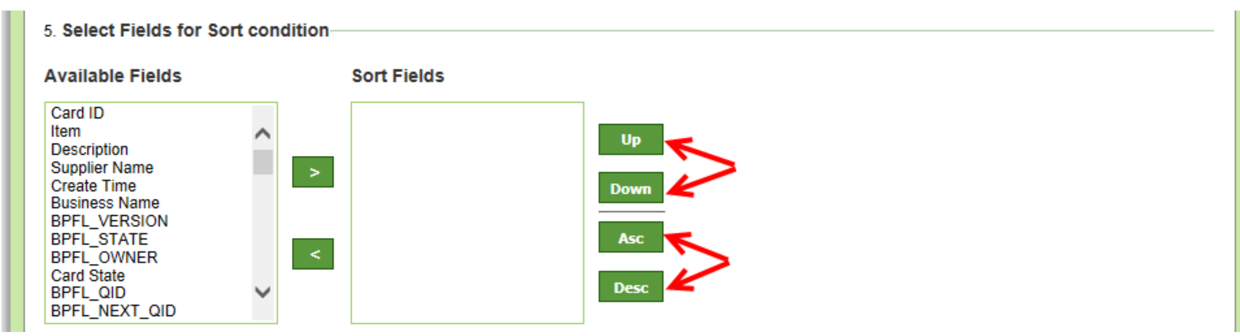
The **selection** has **moved**.



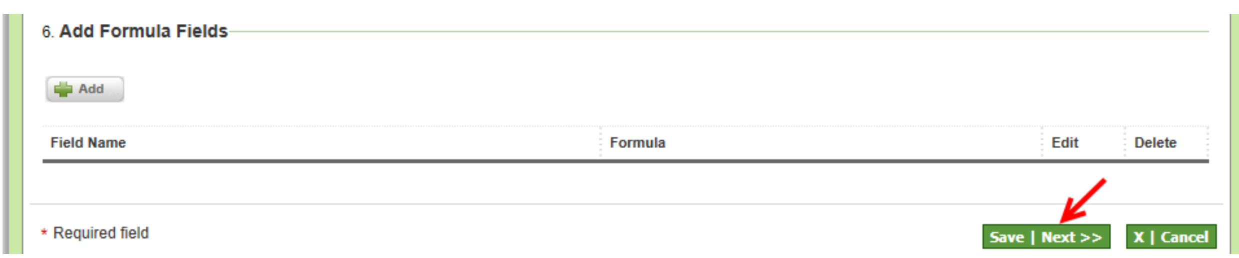
Optional*: In this example we will leave this blank.* For more **detailed instructions** on the "**Select Fields for Sort Condition**" navigate to the "**Tabular**" report instructions.

Quick Tip – The order of the "Sort Fields" selections, by default, are in "Ascending" order. To change the order to "Descending", click on the "Desc" button.

Optional*: "***Select Fields for Sort Condition***" Follow the instructions on the previous page for moving the selections from the "Available Fields" to the Sort Fields. For this example we will leave the "Sort Fields" blank.*



Click on the "**Save|Next**>>" button.

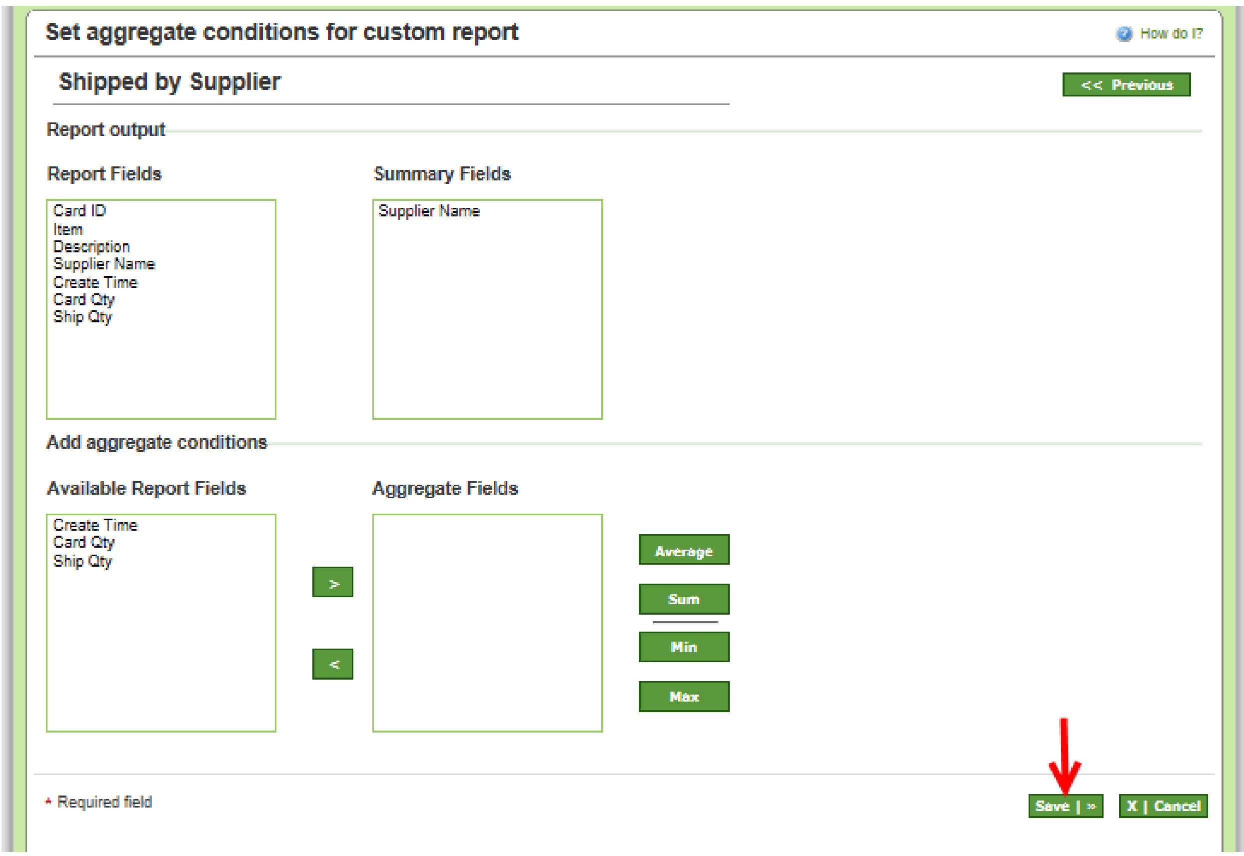


Quick Tip – The "Aggregate Conditions" can now be "Selected" for a "Report". Aggregate: A whole formed by combining several elements.

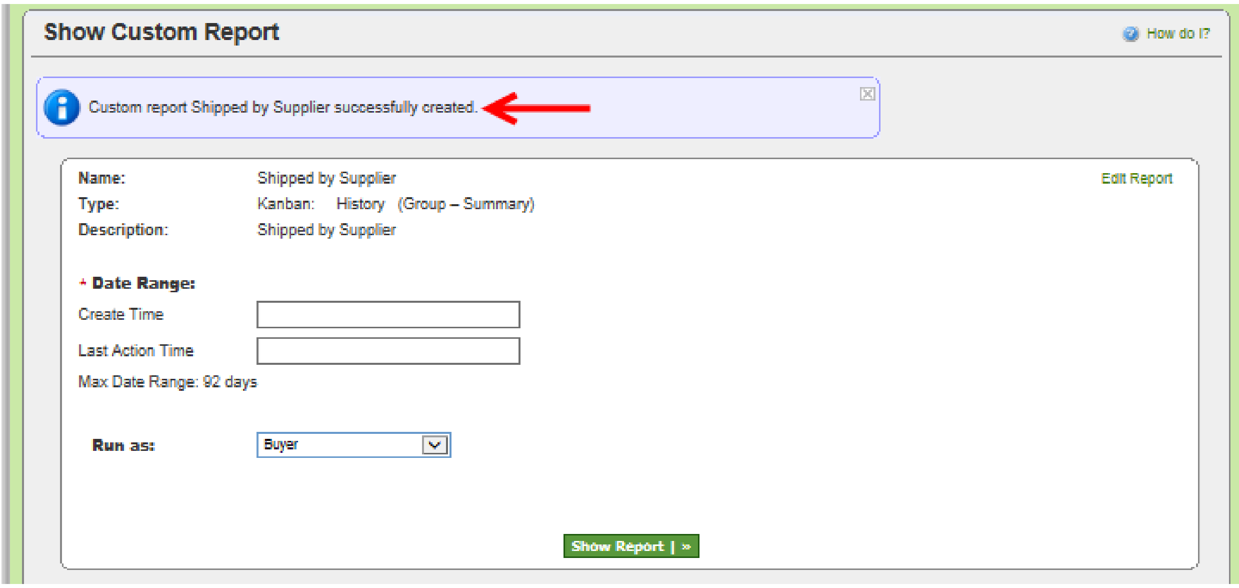
*In this example we will not select an "Aggregate Condition"***.** *For more detailed instructions on setting up an "Aggregate Condition" navigate to the "Group Detailed" report.* To **navigate** to the "**Aggregate Condition**" **click** on the **link below**.

Navigate to Aggregate Condition

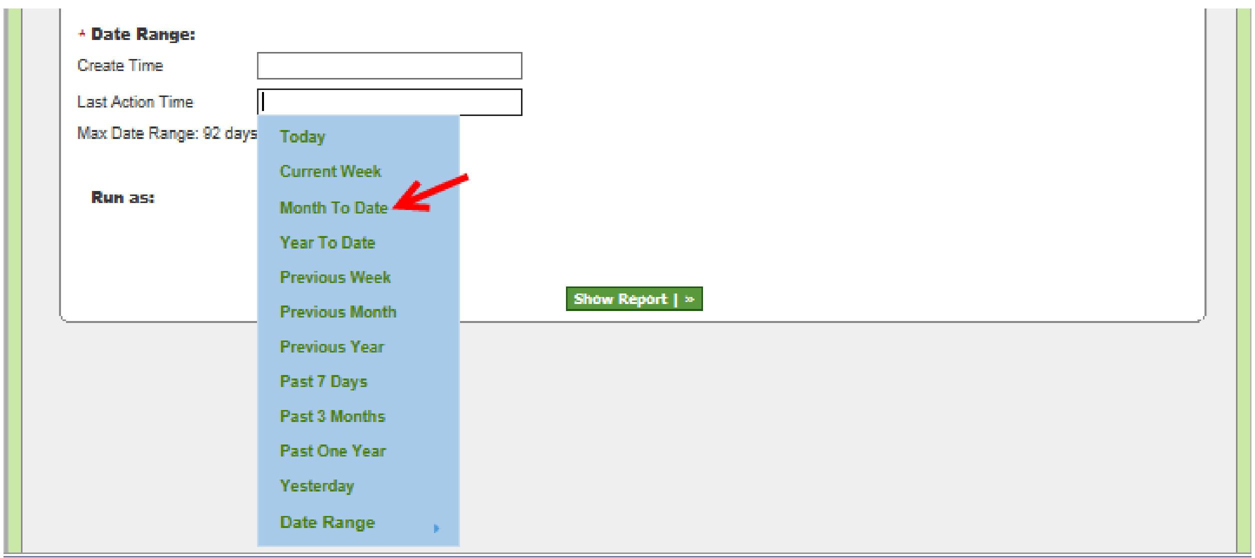
Click on the **"Save"** button



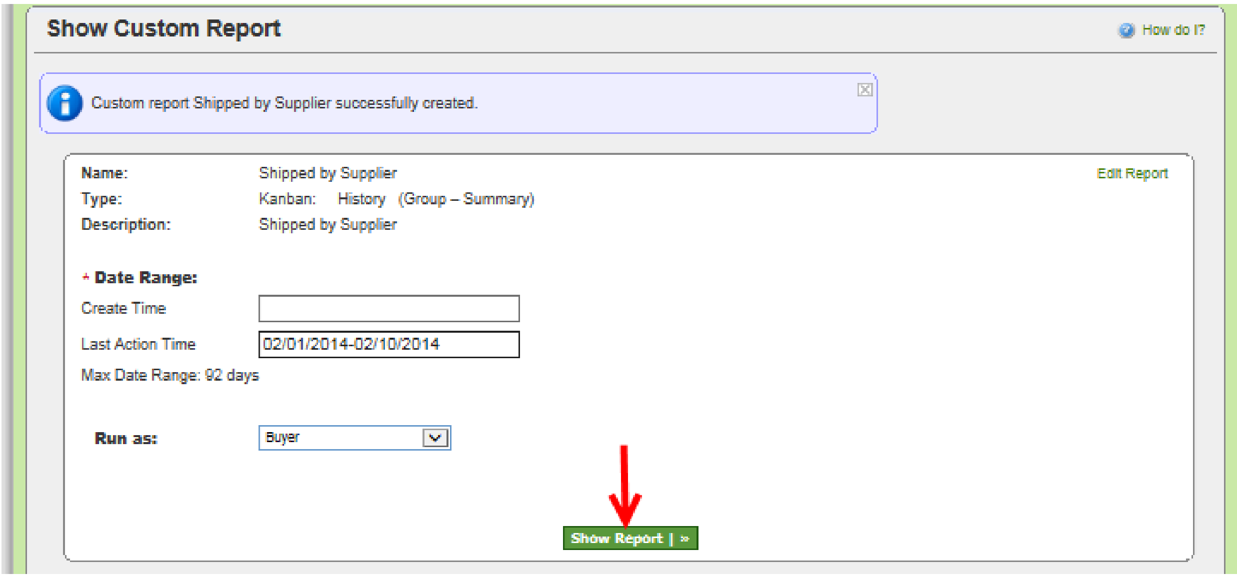
"**Custom Report Shipped by Supplier Successfully Created**"



Click in a "**Date Range**" either "**Create Time**" or "**Last Action Time**" and a **dropdown box** will **appear**. **Click** on the **selection**. *In this example, "Month to Date" will be selected in the "Last Action Time" field.*



Click on the "**Show Report**" button.



The "**Report**" **appears.** It is "**Grouped**" by the "**The number of Cards Shipped**" by the "**Supplier**" during the selected period.