



Ultriva 7.6 and Higher Custom Reports Reference Guide

Table of Contents

(Click to follow link)

<i>Custom Reports Overview</i>	2
<i>Tabular – Kanban Active Cards</i>	4
<i>Group Detailed Report</i>	11
<i>Group Summary Report</i>	21

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*

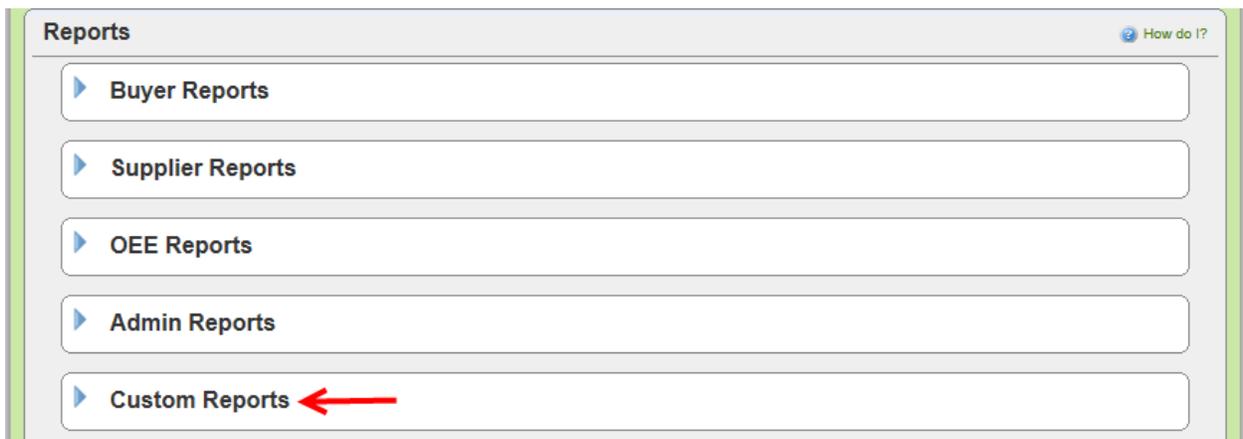
We will cover all 3 types of “Custom Reports” in this guide.

Tabular – Kanban Active Cards

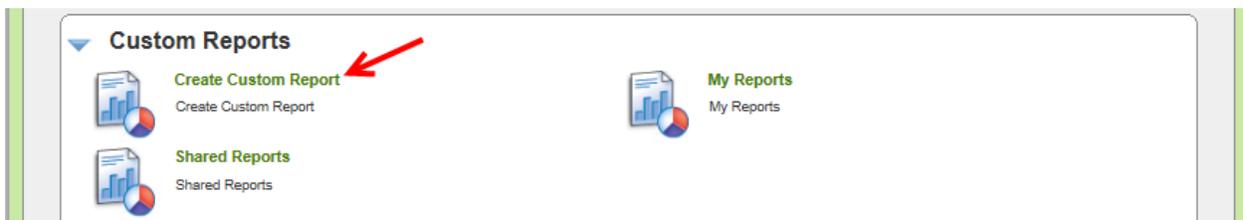
To navigate to the “Custom Reports”, click on “Reports”



Click on “Custom Reports”

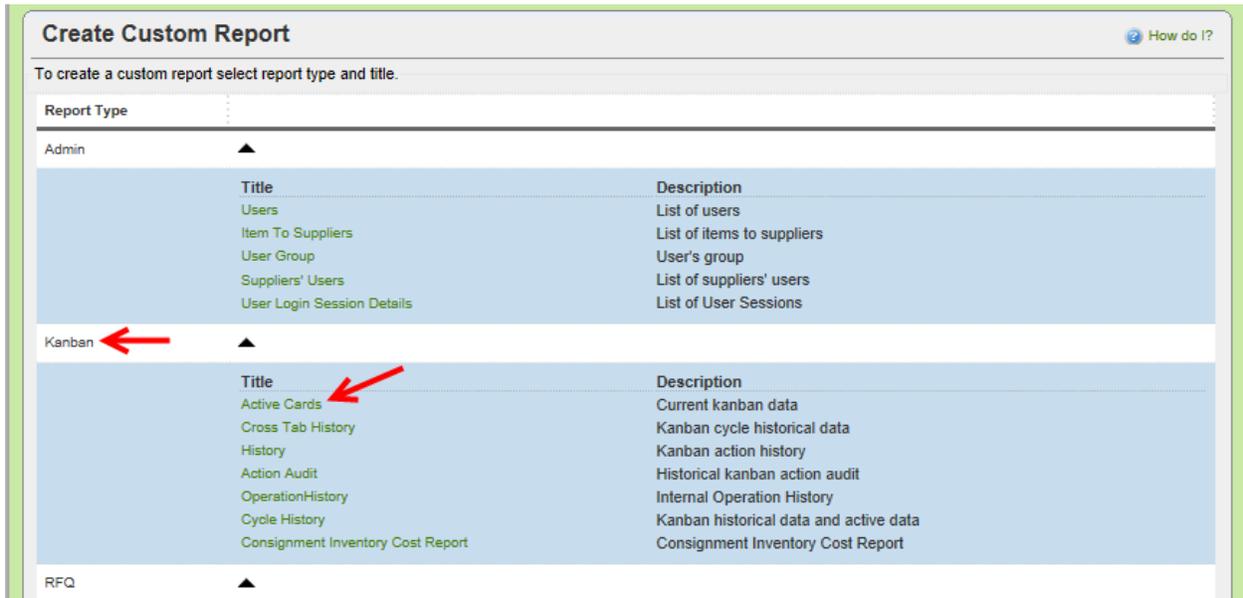


Click on “Create Custom Reports”



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

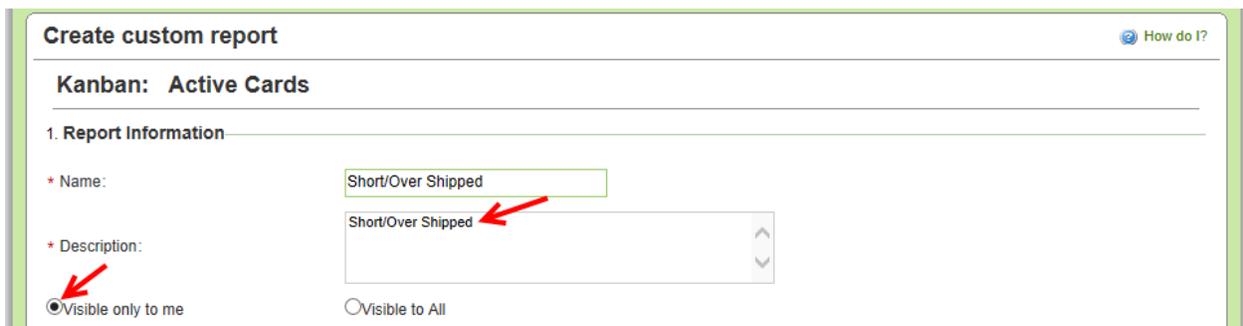
Select the “Report Type” *This Example:* In the “Kanban” field selections, Click on “Active Cards”



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”

2. Report Output Format

Tabular
Group - Detailed
Group - Summary



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.

Card ID
Card State
Cycle No
Card Qty
Ship Qty
Receive Qty
Last Action Time
Location Code
Item

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

3. Add Fields for Report Filter

Please select field, select an operator, enter value and click Add to add the filter condition. You may add any number of filter conditions.

Filter By	Select Operator	Enter Value		
-----------	-----------------	-------------	--	--

[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”

4. Select Fields for the Report output

Available Fields

Card ID
Card State
Cycle No
Card Qty
Ship Qty
Receive Qty
Last Action Time
Location Code
Item
Description
Release Date
Accept Date

Show Fields

Card ID
Card State
Cycle No
Card Qty
Ship Qty
Receive Qty
Last Action Time
Location Code
Item
Description

Up

Down

The selection has moved.

4. Select Fields for the Report output

Available Fields		Show Fields	
Card ID		Card ID	
Card State		Card State	
Cycle No		Cycle No	
Card Qty		Card Qty	
Ship Qty		Ship Qty	
Receive Qty		Receive Qty	
Last Action Time		Last Action Time	
Location Code		Location Code	
Item		Item	
Description		Description	
Release Date		Release Date	
Accept Date			

Up

Down

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

Available Fields		Show Fields	
Card ID		Card ID	
Card State		Card State	
Cycle No		Cycle No	
Card Qty		Card Qty	
Ship Qty		Ship Qty	
Receive Qty		Receive Qty	
Last Action Time		Last Action Time	
Location Code		Location Code	
Item		Item	
Description		Description	
Release Date		Release Date	
Accept Date			

Up

Down

The selection has moved.

4. Select Fields for the Report output

Available Fields		Show Fields	
Card ID		Card ID	
Card State		Card State	
Cycle No		Cycle No	
Card Qty		Card Qty	
Ship Qty		Ship Qty	
Receive Qty		Receive Qty	
Last Action Time		Last Action Time	
Location Code		Location Code	
Item		Item	
Description		Description	
Release Date			
Accept Date			

Up

Down



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.

4. Select Fields for the Report output

Available Fields	Show Fields
Card ID	Card ID
Card State	Card State
Cycle No	Cycle No
Card Qty	Card Qty
Ship Qty	Ship Qty
Receive Qty	Receive Qty
Last Action Time	Last Action Time
Location Code	Location Code
Item	Item
Description	Description
Release Date	
Accept Date	

Up

Down



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.

5. Select Fields for Sort condition

Available Fields	Sort Fields
Card ID	
Card State	
Cycle No	
Card Qty	
Ship Qty	
Receive Qty	
Last Action Time	
Location Code	
Item	
Description	
Release Date	
Accept Date	

Up

Down

Asc

Desc

In the “Add Formula Fields” click on the “ADD” button

6. Add Formula Fields

Add

Field Name	Formula	Edit	Delete
------------	---------	------	--------



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”

Add Formula Field

Formula Field Name:

Card

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')

Formula Field Name:

Card

Expression:

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

+ - * / () space Clear Expression Enter Literal Value Backspace

Available Fields:

Card ID
 Card State
 Cycle No
 Card Qty
 Ship Qty
 Receive Qty
 Last Action Time
 Location Code
 Item
 Description
 Release Date
 Accept Date

Select

Update
Cancel

Click on the “Save” button

Field Name	Formula	Edit	Delete
Card	CASE(Year(ShipDate)>2000,true,(((CardQty=ShipQty)=true)?'Full Shipment' !! 'Short or Over Shipment'),'Not Shipped')		
* Required field		<div style="display: flex; justify-content: flex-end; gap: 10px;"> Save >> X Cancel </div>	

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

Show Custom Report How do I?

Custom report Short/Over Shipped successfully created. ✕

Name: Short/Over Shipped Edit Report
Type: Kanban: Active Cards (Tabular)
Description: Short/Over Shipped

Run as: Buyer ▼

Show Report | >

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

Short/Over Shipped How do I?

Plant: Demo Plant Change Filter Edit Report

Card ID ▼	Card State ▼	Cycle No ▼	Card Qty ▼	Ship Qty ▼	Receive Qty ▼	Last Action Time ▼	Location Code ▼	Item ▼	Description ▼	Card ▲
KCD9572CVSSK	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”

Short/Over Shipped How do I?

Plant: Demo Plant Change Filter Edit Report

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 RECLRH	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

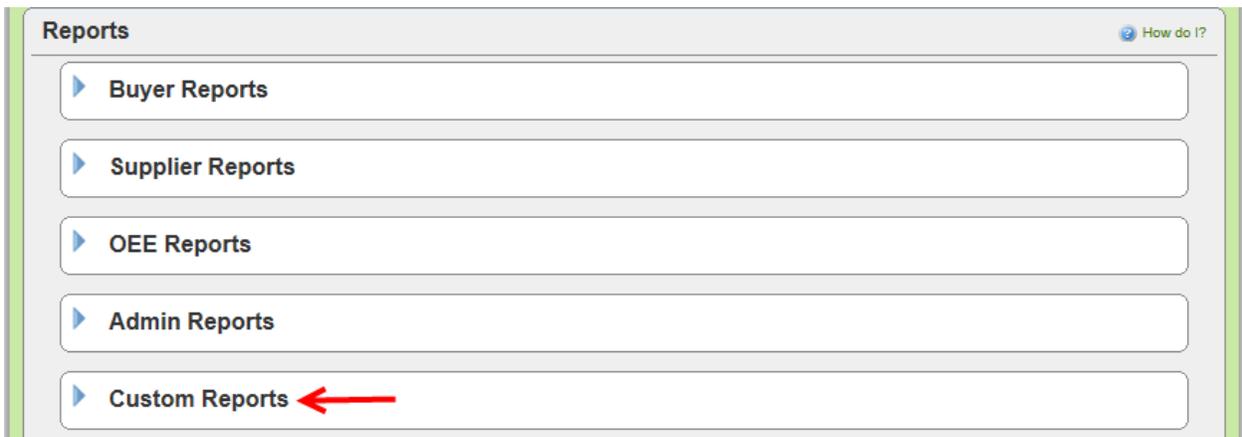


Quick Tip – In this example we will look at a “Kanban History” report for “Recalled” cards. There may be “Plants” not integrated, and may need this information to make adjustments to the ERP.

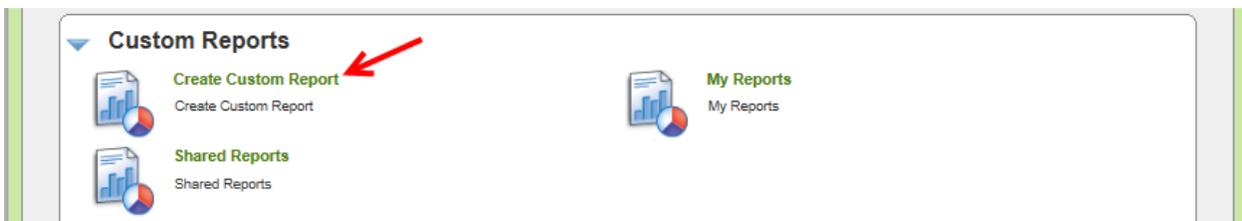
To navigate to the “Custom Reports”, click on “Reports”



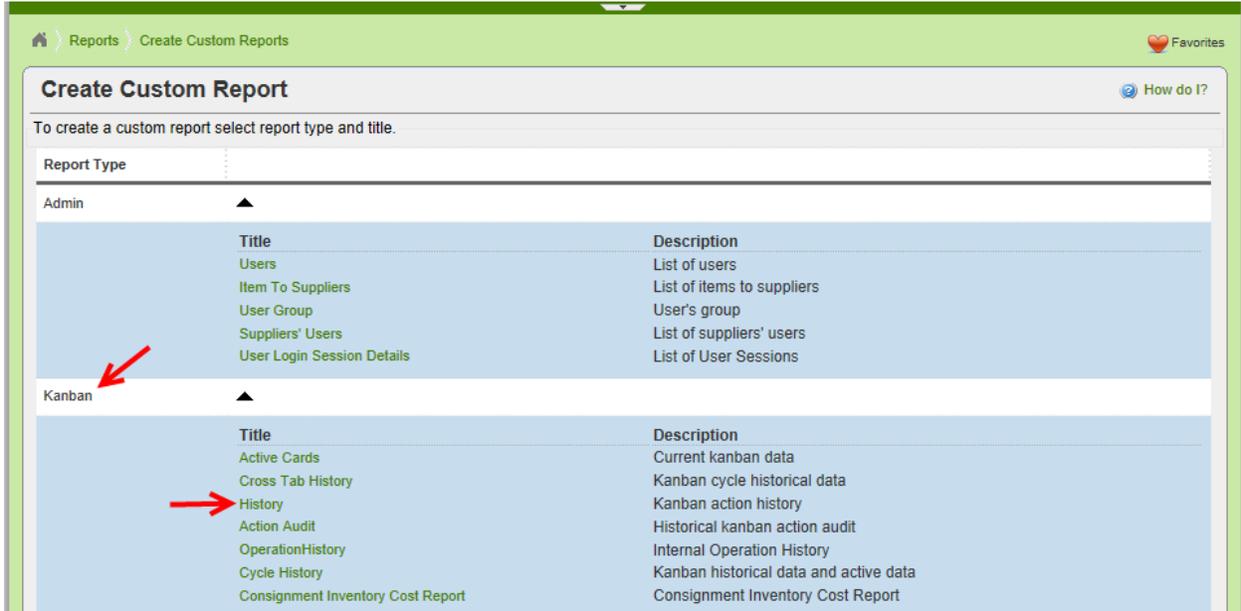
Click on “Custom Reports”



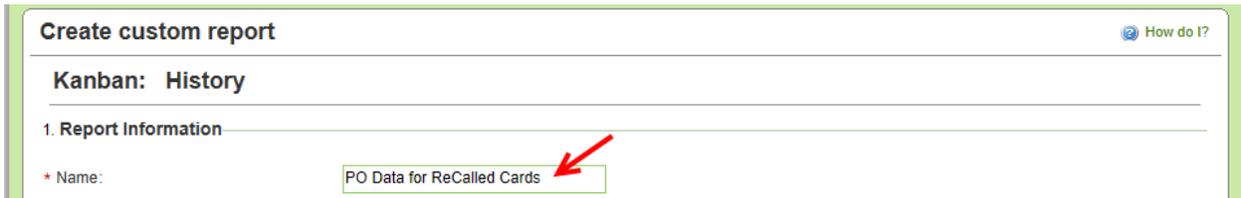
Click on “Create Custom Reports”



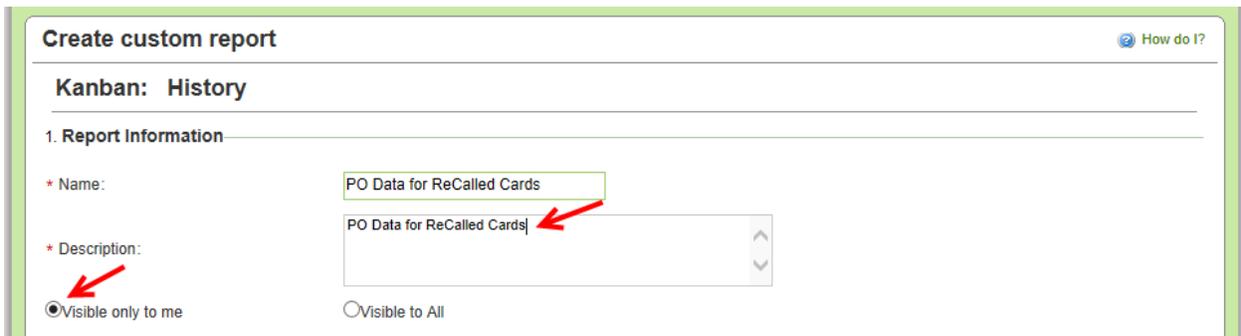
In the “Kanban” fields, click on “History”.



Enter the “Name” of the “Report”



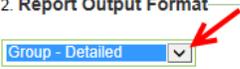
Enter a “Description” for the “Report”. Select an option for viewing the “Report”



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

2. Report Output Format

Group - Detailed



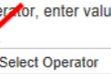
In the “**Add Fields for Report Filter**” click on the **dropdown arrow** in the “**Filter By**” field and select “**BPFL_ACTION**”

3. Add Fields for Report Filter

Please select field, select an operator, enter value and click Add to add the filter condition. You may add any number of filter conditions.

BPFL_ACTION Select Operator Enter Value  

Field Name	Operator	Filter Value	Action
------------	----------	--------------	--------



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

3. Add Fields for Report Filter

Please select field, select an operator, enter value and click Add to add the filter condition. You may add any number of filter conditions.

BPFL_ACTION Equal To Enter Value  

Field Name	Operator	Filter Value	Action
------------	----------	--------------	--------



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

3. Add Fields for Report Filter

Please select field, select an operator, enter value and click Add to add the filter condition. You may add any number of filter conditions.

BPFL_ACTION Equal To Recall  

Field Name	Operator	Filter Value	Action
------------	----------	--------------	--------



The “**Filter**” appears.

3. Add Fields for Report Filter

Please select field, select an operator, enter value and click Add to add the filter condition. You may add any number of filter conditions.

Filter By Select Operator Enter Value  

Field Name	Operator	Filter Value	Action
BPFL_ACTION	Equal To	Recall	



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.

4. Select Fields for the Report output

Available Fields

- BusGID
- UsagePerDay
- Qty On Card
- SafetyStock
- FamilyGID
- IGParams
- Flags
- PO #
- PO Line #
- Release #
- Release Line #
- Packing Slip No

Show Fields

- Card ID
- Item
- Description
- Supplier Name
- Create Time

*** Summary Fields**

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

4. Select Fields for the Report output

Available Fields

- ParentGID
- Reqd Receive
- Reqd Ship
- SupplierGID
- CycleGID
- StateTime
- ActionBy
- Cycle No
- Card Qty
- OperationCode
- OperUpDATETIME
- Approved Qty

Show Fields

- Card ID
- Item
- Description
- Supplier Name
- Create Time
- PO #
- PO Line #
- Card State
- BPFL_ACTION
- Card Qty

*** Summary Fields**

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.

4. Select Fields for the Report output

Available Fields

- ParentGID
- Reqd Receive
- Reqd Ship
- SupplierGID
- CycleGID
- StateTime
- ActionBy
- Cycle No
- Card Qty
- OperationCode
- OperUpDATETIME
- Approved Qty

Show Fields

- Card ID
- Item
- Description
- Supplier Name
- Create Time
- PO #
- PO Line #
- Card State
- BPFL_ACTION
- Card Qty
- OperationCode

*** Summary Fields**

The selection has moved back.

4. Select Fields for the Report output

Available Fields	Show Fields	* Summary Fields
ParentGID Reqd Receive Reqd Ship SupplierGID CycleGID StateTime ActionBy Cycle No Card Qty OperationCode OperUpDATETIME Approved Qty	Card ID Item Description Supplier Name Create Time PO # PO Line # Card State BPFL_ACTION Card Qty	

Buttons: > (between Available and Show), < (between Show and Available), Up, > (between Show and Summary), Down, < (between Summary and Show)



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.

4. Select Fields for the Report output

Available Fields	Show Fields	* Summary Fields
ParentGID Reqd Receive Reqd Ship SupplierGID CycleGID StateTime ActionBy Cycle No Card Qty OperationCode OperUpDATETIME Approved Qty	Card ID Item Description Supplier Name Create Time PO # PO Line # Card State BPFL_ACTION Card Qty	

Buttons: > (between Available and Show), < (between Show and Available), Up, > (between Show and Summary), Down, < (between Summary and Show)



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”

4. Select Fields for the Report output

Available Fields	Show Fields	* Summary Fields
ParentGID Reqd Receive Reqd Ship SupplierGID CycleGID StateTime ActionBy Cycle No Card Qty OperationCode OperUpDATETIME Approved Qty	Card ID Item Description Supplier Name Create Time PO # PO Line # Card State BPFL_ACTION Card Qty	

Buttons: > (between Available and Show), < (between Show and Available), Up, > (between Show and Summary), Down, < (between Summary and Show)

The selection has moved.

4. Select Fields for the Report output

Available Fields	Show Fields	* Summary Fields
ParentGID Reqd Receive Reqd Ship SupplierGID CycleGID StateTime ActionBy Cycle No Card Qty OperationCode OperUPDATETIME Approved Qty	Card ID Item Description Supplier Name Create Time PO # PO Line # Card State BPFL_ACTION Card Qty	PO #



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.

5. Select Fields for Sort condition

Available Fields	Sort Fields
Card ID Item Description Supplier Name Create Time Business Name BPFL_VERSION BPFL_STATE BPFL_OWNER Card State BPFL_QID BPFL_NEXT_QID	

Up
Down
Asc
Desc

Click on the “Save|Next>>” button.

6. Add Formula Fields

+ Add

Field Name	Formula	Edit	Delete

* Required field

Save | Next >> X | Cancel



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”. Click on one of the buttons 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”

Show Custom Report How do I?

Custom report PO Data for Recalled Cards successfully updated. ←

Name: PO Data for Recalled Cards Edit Report
Type: Kanban: History (Group - Detailed)
Description: PO Data for Recalled Cards

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

Run as: Buyer

*** Filter:**

Field Name	Operator	Filter Value
BPFL_ACTION	Equal To <input type="text"/>	Recall <input type="text"/>

Show Report | >

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.*

The screenshot shows a report configuration interface. Under the "Date Range:" section, there are two fields: "Create Time" and "Last Action Time". The "Last Action Time" field contains the date range "02/01/2014-02/10/2014" and has a dropdown menu open. The dropdown menu lists several options: "Today", "Current Week", "Month To Date" (highlighted with a red arrow), "Year To Date", "Previous Week", "Previous Month", "Previous Year", "Past 7 Days", "Past 3 Months", "Past One Year", "Yesterday", and "Date Range". Below the date range fields is a "Run as:" section and a "Filter:" section. The "Filter:" section has a table with columns "Field Name" and "Filter Value". The "Field Name" is "BPFL_ACTION" and the "Filter Value" is "Recall". A "Show Report" button is located below the filter table.



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 screenshot shows the "Filter:" section of the report configuration interface. It has a table with columns "Field Name", "Operator", and "Filter Value". The "Field Name" is "BPFL_ACTION", the "Operator" is "Equal To" (with a dropdown arrow highlighted by a red arrow), and the "Filter Value" is "Recall". A "Show Report" button is located below the filter table, also highlighted by a red arrow.

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

PO Data for Recalled Cards									
PO #	Card ID	Item	Description	Supplier Name	Create Time	PO Line #	Card State	BPFL_ACTION	Card Qty
	KCD00203735	176066-01	NATL 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

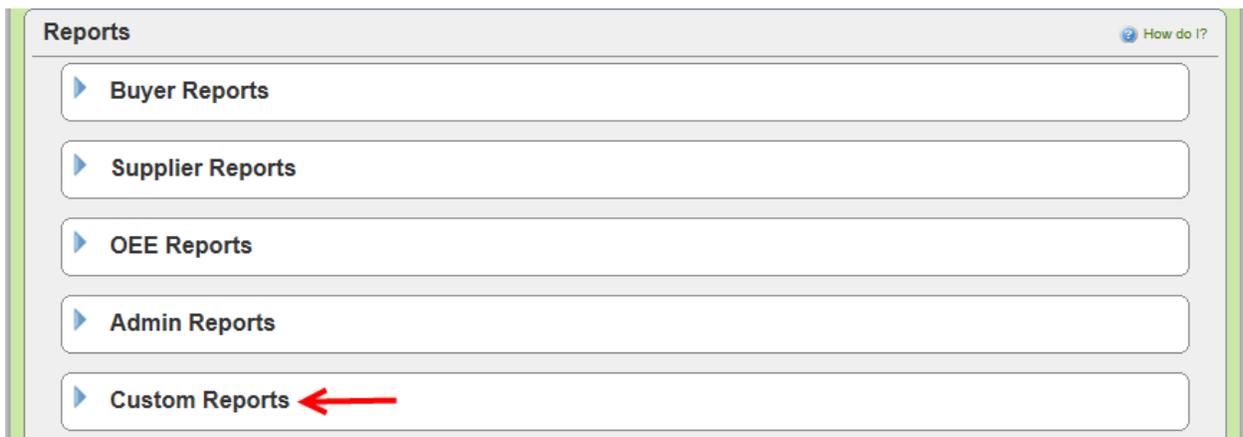


Quick Tip – In this example we will look at a “Kanban History” report for “Shipped” cards.

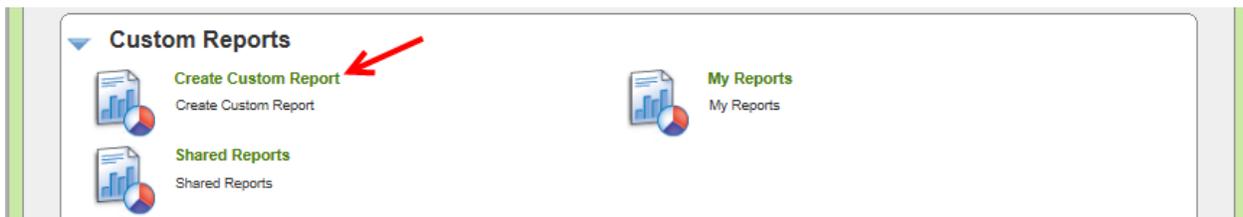
To navigate to the “Custom Reports”, click on “Reports”



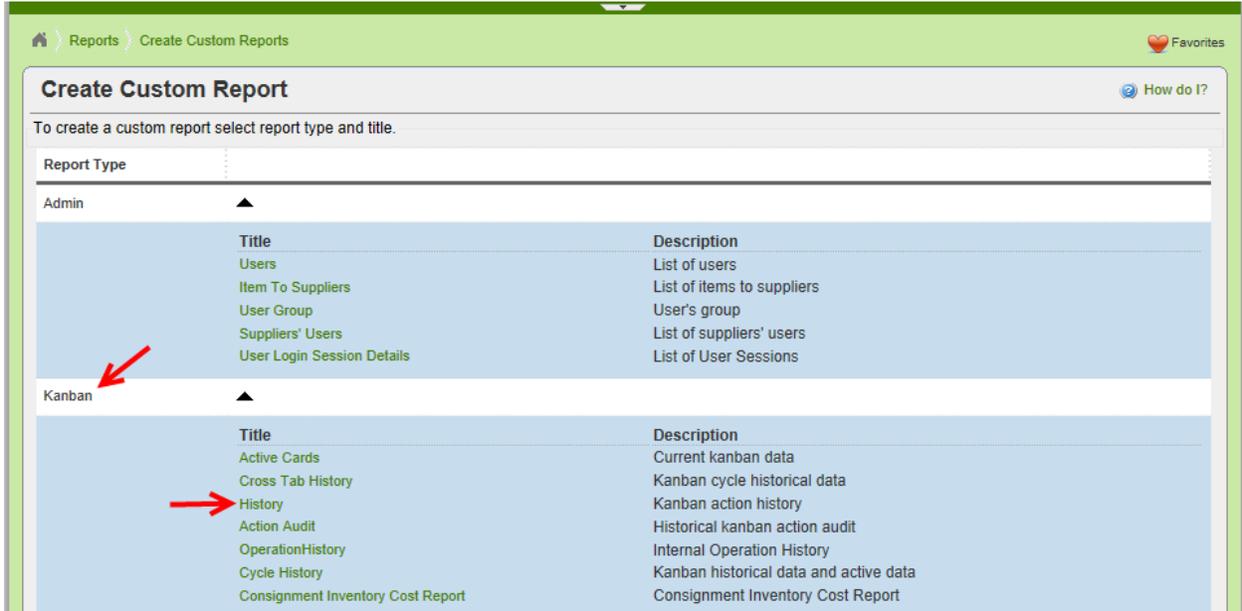
Click on “Custom Reports”



Click on “Create Custom Reports”



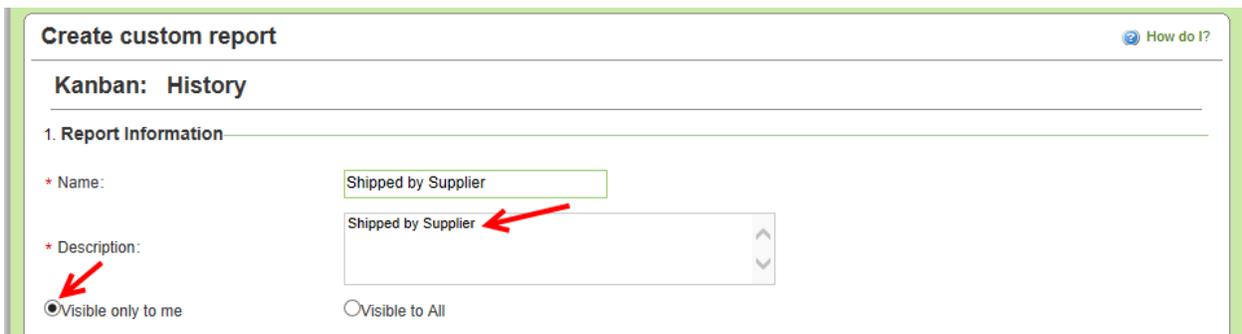
In the “Kanban” fields, click on “History”.



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”**

2. Report Output Format

Group – Summary

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

3. Add Fields for Report Filter

Please select field, select an operator, enter value and click Add to add the filter condition. You may add any number of filter conditions.

BPFL_ACTION Select Operator Enter Value Add

Field Name	Operator	Filter Value	Action
------------	----------	--------------	--------

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

3. Add Fields for Report Filter

Please select field, select an operator, enter value and click Add to add the filter condition. You may add any number of filter conditions.

BPFL_ACTION Equal To Enter Value Add

Field Name	Operator	Filter Value	Action
------------	----------	--------------	--------

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

3. Add Fields for Report Filter

Please select field, select an operator, enter value and click Add to add the filter condition. You may add any number of filter conditions.

BPFL_ACTION Equal To Ship Add

Field Name	Operator	Filter Value	Action
------------	----------	--------------	--------

The **“Filter”** appears.

3. Add Fields for Report Filter

Please select field, select an operator, enter value and click Add to add the filter condition. You may add any number of filter conditions.

Filter By Select Operator Enter Value Add

Field Name	Operator	Filter Value	Action
BPFL_ACTION	Equal To	Ship	✖

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.

4. Select Fields for the Report output

Available Fields	Show Fields	* Summary Fields
CarrierGID ShipStatusID Ship Qty Receive Qty ParentGID Reqd Receive Reqd Ship SupplierGID CycleGID StateTime ActionBy Cycle No	Card ID Item Description Supplier Name Create Time Card Qty Ship Qty	



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.

4. Select Fields for the Report output

Available Fields	Show Fields	* Summary Fields
CarrierGID ShipStatusID Ship Qty Receive Qty ParentGID Reqd Receive Reqd Ship SupplierGID CycleGID StateTime ActionBy Cycle No	Card ID Item Description Supplier Name Create Time Card Qty Ship Qty	



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**”

4. Select Fields for the Report output

Available Fields	Show Fields	* Summary Fields
CarrierGID ShipStatusID Ship Qty Receive Qty ParentGID Reqd Receive Reqd Ship SupplierGID CycleGID StateTime ActionBy Cycle No	Card ID Item Description Supplier Name Create Time Card Qty Ship Qty	

The selection has moved.

4. Select Fields for the Report output

Available Fields

- CarrierGID
- ShipStatusID
- Ship Qty
- Receive Qty
- ParentGID**
- Reqd Receive
- Reqd Ship
- SupplierGID
- CycleGID
- StateTime
- ActionBy
- Cycle No

Show Fields

- Card ID
- Item
- Description
- Supplier Name
- Create Time**
- Card Qty
- Ship Qty

*** Summary Fields**

- Supplier Name

Up > < Down <

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.

5. Select Fields for Sort condition

Available Fields

- Card ID
- Item
- Description
- Supplier Name
- Create Time
- Business Name
- BPFL_VERSION
- BPFL_STATE
- BPFL_OWNER
- Card State
- BPFL_QID
- BPFL_NEXT_QID

Sort Fields

- Up
- Down
- Asc
- Desc

Click on the “**Save|Next>>**” button.

6. Add Formula Fields

+ Add

Field Name	Formula	Edit	Delete

* Required field

Save | Next >> X | Cancel



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

Set aggregate conditions for custom report How do I?

Shipped by Supplier << Previous

Report output

Report Fields
Card ID
Item
Description
Supplier Name
Create Time
Card Qty
Ship Qty

Summary Fields
Supplier Name

Add aggregate conditions

Available Report Fields
Create Time
Card Qty
Ship Qty

Aggregate Fields

Average
Sum
Min
Max

+ Required field

Save | >> X | Cancel

“Custom Report Shipped by Supplier Successfully Created”

The screenshot shows a web interface titled "Show Custom Report". At the top right, there is a "How do I?" link. Below the title, a blue notification box contains the message "Custom report Shipped by Supplier successfully created." with a red arrow pointing to it. The main content area displays report details: Name: Shipped by Supplier, Type: Kanban: History (Group - Summary), and Description: Shipped by Supplier. There is an "Edit Report" link. Under the "Date Range:" section, there are two input fields for "Create Time" and "Last Action Time", and a "Max Date Range: 92 days" label. A "Run as:" dropdown menu is set to "Buyer". At the bottom right, there is a "Show Report | >" button.

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.*

This screenshot shows a close-up of the "Date Range:" section. The "Create Time" and "Last Action Time" input fields are visible. A dropdown menu is open over the "Last Action Time" field, listing various date range options: Today, Current Week, Month To Date (highlighted with a red arrow), Year To Date, Previous Week, Previous Month, Previous Year, Past 7 Days, Past 3 Months, Past One Year, Yesterday, and Date Range. The "Run as:" dropdown is still set to "Buyer". The "Show Report | >" button is also visible at the bottom right.

Click on the “Show Report” button.

Show Custom Report How do I?

Custom report Shipped by Supplier successfully created.

Name: Shipped by Supplier Edit Report
Type: Kanban: History (Group – Summary)
Description: Shipped by Supplier

+ Date Range:
Create Time:
Last Action Time:
Max Date Range: 92 days

Run as:

Show Report

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

Shipped by Supplier How do I?

Plant: Demo Plant, Last Action Time: 02/01/2014-02/10/2014 Change Filter Edit Report

Supplier Name	Total
Rat Terriers Inc	2
Redbone Coonhound Inc	2
St. Bernard Inc	2
Tibetan Terrier Inc	2
Whippets Inc	6

1 to 5 of 5