



Ultriva 7.6 and Higher Material Status Reference Guide

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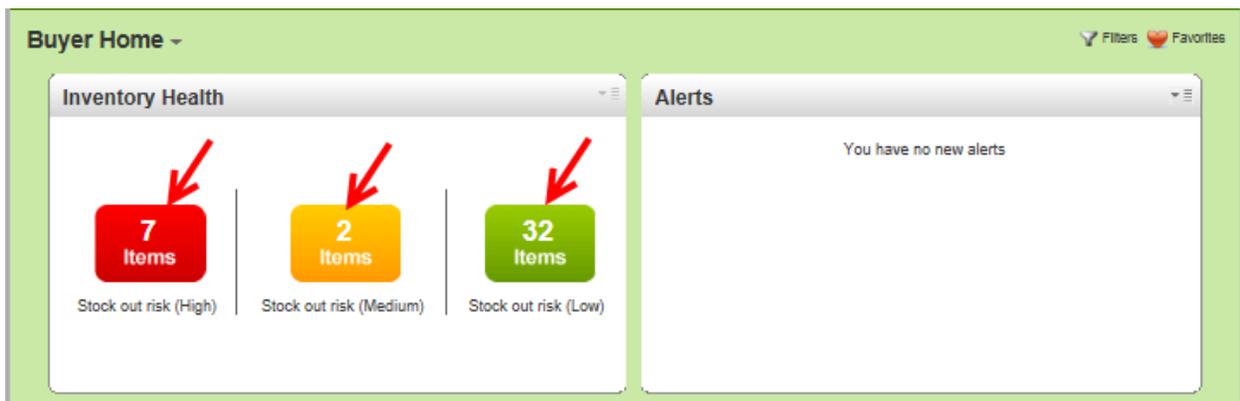
Navigate to Material Status



Quick Tip – There are 2 ways to navigate to the Material Status screen. The items in “Red and Yellow” should be looked at on a daily basis to help prevent any “Stock Out” conditions. When items are in “Green” on a continuous basis, they should be looked at for possible inventory reductions.

Option 1:

From the **Home (Default)** screen, **Inventory Health** section, **click** on the **number** inside a “Red, Yellow or Green” box. A filtered version of those items in the selected status will appear on the Material Status screen.

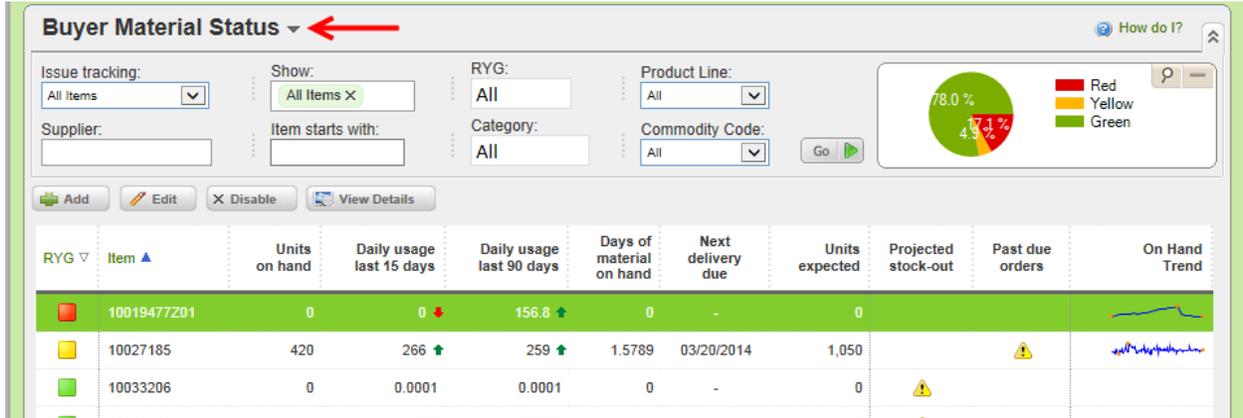


Option 2:

From the **Home (Default)** screen, **click** on “Material Status”



The “Material Status” screen appears.



Material Status Screen Filtering



Quick Tip – Further filtering can be performed if you are looking for specific data on the items. All “Filtering” is optional.

When all changes have been made to the “Filter”, click on the “Go” button for the changes to take effect.

Click on the **dropdown arrow** in the “Issue Tracking” field and a **drop down list** appears. Click on a **selection**. (You can filter for: All Items, Late Shipments, Late Receipts and Late Acknowledgements. In this example we will leave All Items selected.)

The screenshot shows the 'Buyer Material Status' interface. The 'Issue tracking' dropdown is open, with 'All Items' selected. The 'Show' field contains 'All Items X'. The 'RYG' field is set to 'All'. The 'Product Line' is set to 'All'. The 'Commodity Code' is set to 'All'. A pie chart shows 52.5% Green and 47.5% Red. Below the filters is a table with columns: RYG, Item, Units on hand, Daily usage last 15 days, Daily usage last 90 days, Days of material on hand, Next delivery due, Units expected, Projected stock-out, Past due orders, and On Hand Trend.

RYG	Item	Units on hand	Daily usage last 15 days	Daily usage last 90 days	Days of material on hand	Next delivery due	Units expected	Projected stock-out	Past due orders	On Hand Trend
Green	10027185	840	266	259	3.1579	04/02/2014	420			
Green	10033206	0	0.0001	0.0001	0	-	0	Warning		
Green	10043943	0	0.2027	0.2027	0	-	0	Warning		

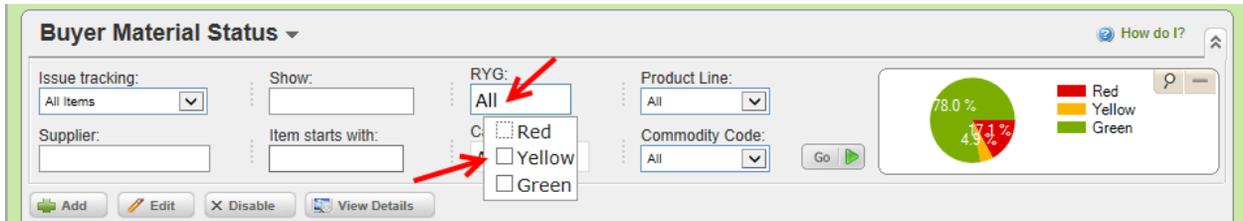
In the **Show** field, the “All Items” selection is **pre-populated**. To **remove** it and make a different selection, **click** on the “X”.

The screenshot shows the 'Buyer Material Status' interface. The 'Issue tracking' dropdown is set to 'All Items'. The 'Show' field contains 'All Items X'. A red arrow points to the 'X'. The 'RYG' field is set to 'All'. The 'Product Line' is set to 'All'. The 'Commodity Code' is set to 'All'. A pie chart shows 78.0% Green, 17.1% Red, and 4.9% Yellow.

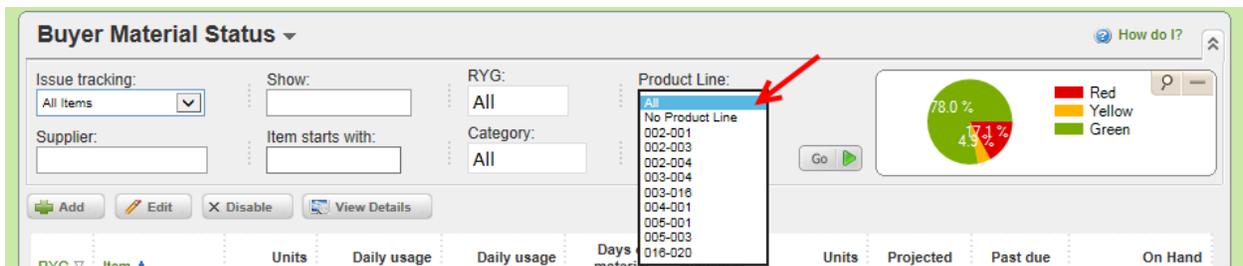
Once removed, **click** in the “Show” field and **press** the **spacebar** or **type** in the **first letter** for the name of the selection and a **dropdown box** appears. Click on a **selection**. (In this example we will leave “All Items” as the selection)

The screenshot shows the 'Buyer Material Status' interface. The 'Issue tracking' dropdown is set to 'All Items'. The 'Show' field dropdown is open, showing 'All Items' selected. A red arrow points to the 'All Items' selection. The 'RYG' field is set to 'All'. The 'Product Line' is set to 'All'. The 'Commodity Code' is set to 'All'. A pie chart shows 78.0% Green, 17.1% Red, and 4.9% Yellow.

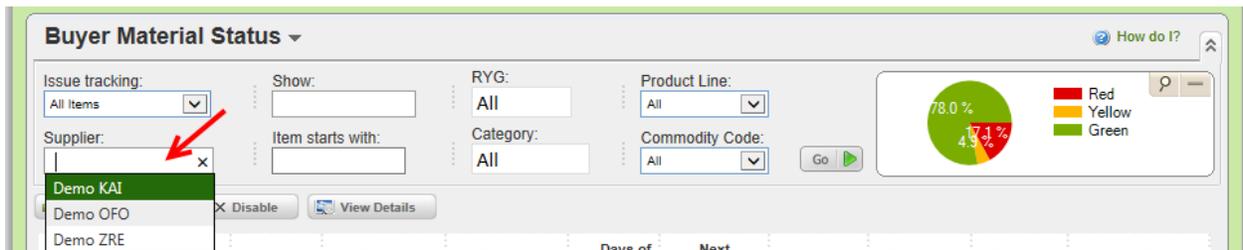
To select a **Red, Yellow or Green** option, click in the “**RYG**” field and a **dropdown list** appears. Click in a box next to the selection to select it. (In this example we will leave “All” as the selection)



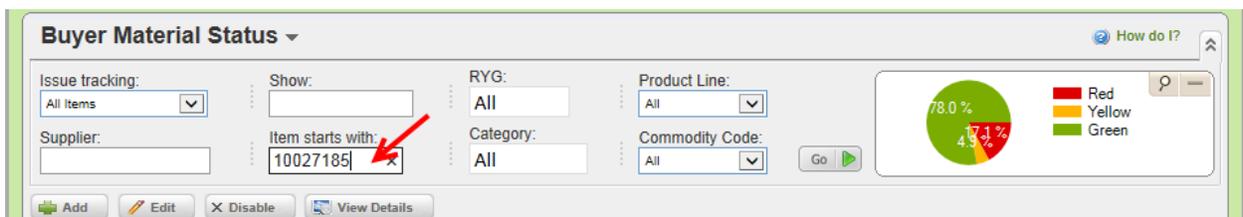
Click on the **dropdown arrow** in the “**Product Line**” field and a **dropdown list** appears. Click on a **selection**. (In this example we will leave “All” as the selection)



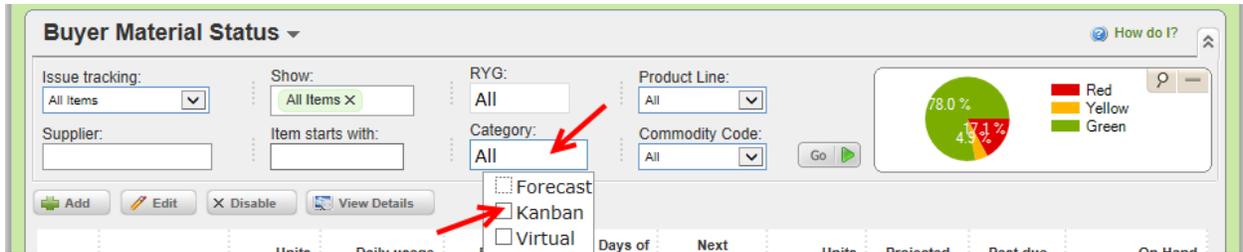
To **filter** by a **Supplier**, click in the “**Supplier**” field and **press the spacebar** or **type in the first letter** for the name of the selection. A **dropdown box** appears. Click on a selection. (In this example we will leave the field blank for all suppliers)



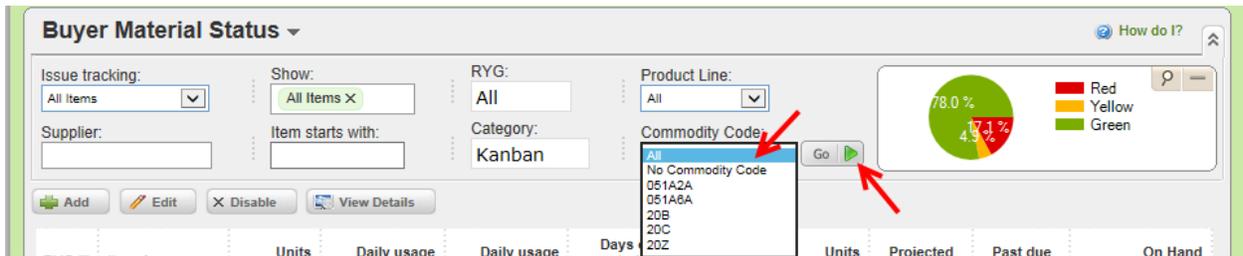
To **filter** by an **Item**, click in the “**Item**” field and **type in the “Item Number”**. (In this example we will leave the field blank for all items)



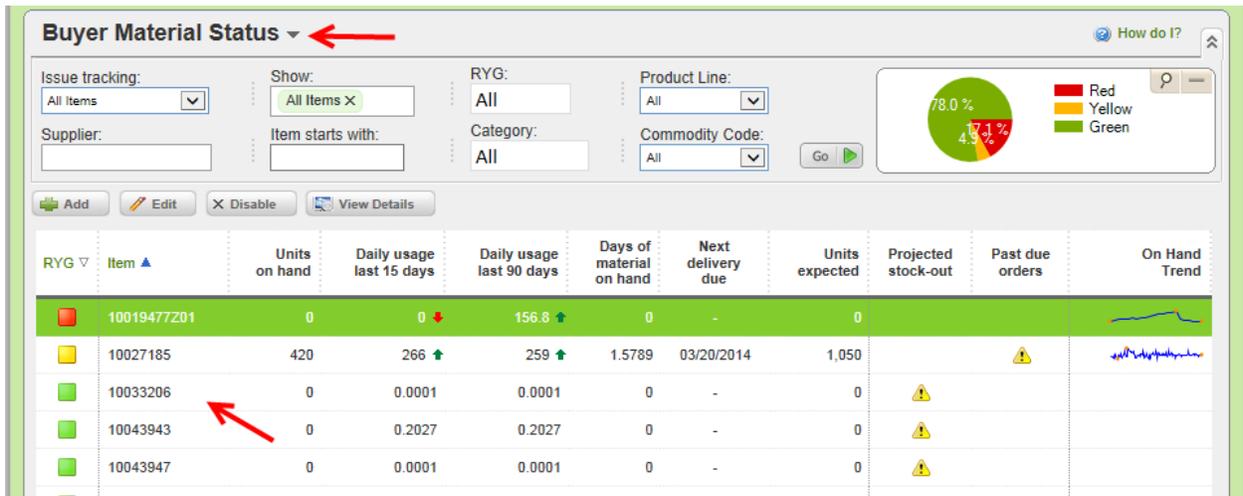
To select a **Category** option, click in the “**Category**” field and a **dropdown list** appears. Click in a **box next to the selection** to select it. (In this example we will select “**Kanban**” as the selection)



Click on the **dropdown arrow** in the “**Commodity Code**” field and a **dropdown list** appears. Click on a **selection**. Click on the “**Go**” button. (In this example we will leave “**All**” as the selection)



The “**Filters**” have been **applied** to the “**Buyer Material Status**” screen.



Material Status Screen Breakdown



Quick Tip – The items in “Red and Yellow” should be looked at on a daily basis to help prevent any “Stock Out” conditions.

RYG – The “Inventory Health” status that the cards are in. Red, Yellow or Green

Item – The “Item/Part” number

Units on hand – The sum of all “Card Quantities”

RYG	Item	Units on hand	Daily usage last 15 days	Daily usage last 90 days	Days of material on hand	Next delivery due	Units expected	Projected stock-out	Past due orders	On Hand Trend
	10027185	420	266 ↑	259 ↑	1.5789	03/20/2014	1,050			
	10046647	840	373.3333 ↑	308 ↑	2.25	03/24/2014	840			
	10189403	210	28 ↑	11.4896 ↓	7.5	03/24/2014	210			
	10225610	400	73.3333 ↑	80 ↑	5.4545	-	0			
	10226365	1920	432 ↑	293.3333 ↑	4.4444	-	0			



Quick Tip – The green arrows in the “Daily Usage” columns can show a trend up or a trend down in the usage. The usage in this calculation is based on the “Standard” usage set up in Ultriva, either through the manual set-up process, item sync or the manual data load. You can view the percent of the trend, either up or down, by hovering the mouse over the arrow.

Daily usage last 15 days – Based on history, the average daily usage for the past 15 days

Daily usage last 90 days – Based on history, the average daily usage for the past 90 days

RYG	Item	Units on hand	Daily usage last 15 days	Daily usage last 90 days	Days of material on hand	Next delivery due	Units expected	Projected stock-out	Past due orders	On Hand Trend
	10027185	420	266 ↑	259 ↓	3.58% 89	03/20/2014	1,050			
	10046647	840	373.3333 ↑	308 ↑	2.25	03/24/2014	840			
	10189403	210	28 ↑	11.4896 ↓	7.5	03/24/2014	210			
	10225610	400	73.3333 ↑	80 ↑	5.4545	-	0			
	10226365	1920	432 ↑	293.3333 ↑	4.4444	-	0			

Days of material on hand – Current units on hand divided by the last 15 days daily usage

Next delivery due – The date of the next delivery

Units expected - Once the order is accepted by the supplier it will capture the sum of all cards due for the next delivery date.

RYG	Item	Units on hand	Daily usage last 15 days	Daily usage last 90 days	Days of material on hand	Next delivery due	Units expected	Projected stock-out	Past due orders	On Hand Trend
	10027185	420	266 ↑	259 ↑	1.5789	03/20/2014	1,050		⚠	
	10046647	840	373.3333 ↑	308 ↑	2.25	03/24/2014	840		⚠	
	10189403	210	28 ↑	11.4896 ↓	7.5	03/24/2014	210		⚠	
	10225610	400	73.3333 ↑	80 ↑	5.4545	-	0			
	10226365	1920	432 ↑	293.3333 ↑	4.4444	-	0			

Projected stock-out – The “Users” get a heads up on a potential stock out. The trigger for a projected stock out is derived by what is entered into the RYG Rule.

Past due orders – Shows how many orders have not been shipped and/or not received in the expected time frame. Some “Action” needs to take place.

RYG	Item	Units on hand	Daily usage last 15 days	Daily usage last 90 days	Days of material on hand	Next delivery due	Units expected	Projected stock-out	Past due orders	On Hand Trend
	10027185	420	266 ↑	259 ↑	1.5789	03/20/2014	1,050		⚠	
	10046647	840	373.3333 ↑	308 ↑	2.25	03/24/2014	840		⚠	
	10189403	210	28 ↑	11.4896 ↓	7.5	03/24/2014	210		⚠	
	10225610	400	73.3333 ↑	80 ↑	5.4545	-	0			
	10226365	1920	432 ↑	293.3333 ↑	4.4444	-	0			

On Hand Trend – Looks back over time at the On-hand Trend of the “Item” and the “Safety Stock” levels.

To view the **chart** for the “On Hand Trend”, click on the **line graph** in the “On Hand Trend” column.

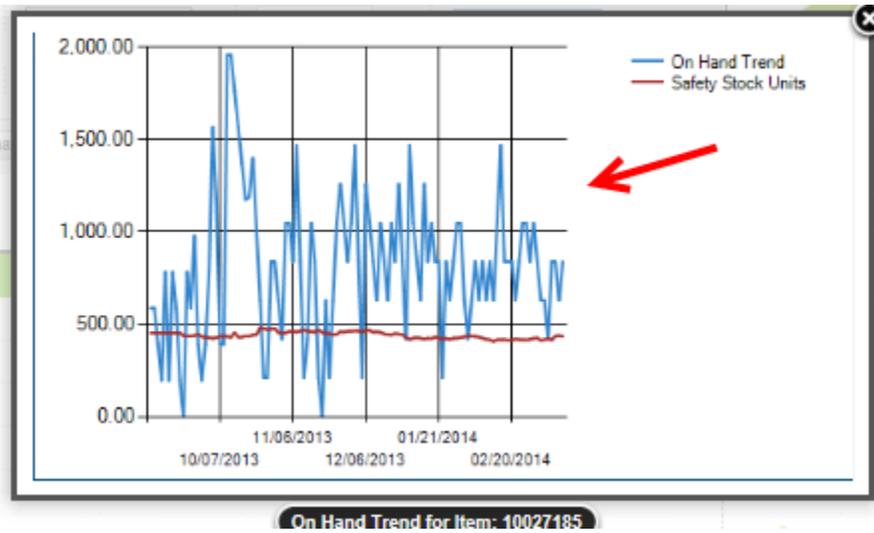
RYG	Item	Units on hand	Daily usage last 15 days	Daily usage last 90 days	Days of material on hand	Next delivery due	Units expected	Projected stock-out	Past due orders	On Hand Trend
	10027185	420	266 ↑	259 ↑	1.5789	03/20/2014	1,050		⚠	
	10046647	840	373.3333 ↑	308 ↑	2.25	03/24/2014	840		⚠	
	10189403	210	28 ↑	11.4896 ↓	7.5	03/24/2014	210		⚠	
	10225610	400	73.3333 ↑	80 ↑	5.4545	-	0			
	10226365	1920	432 ↑	293.3333 ↑	4.4444	-	0			

The “Chart” appears.

Chart Output:

On Hand Trend

Safety Stock Units (Quantity)



Add-Edit-Disable Items



Important – You must be a Plant Administrator to perform these actions. If you do not see the Add, Edit or Delete buttons, you do not have the privileges to do so.

Click on a **button** below to “Add or Edit” an Item

RYG	Item	Units on hand	Daily usage last 15 days	Daily usage last 90 days	Days of material on hand	Next delivery due	Units expected	Projected stock-out	Past due orders	On Hand Trend
Red	10019477Z01	0	0	156.8	0	-	0			
Yellow	10027185	420	266	259	1,5789	03/20/2014	1,050			

Add the item information as per your current set-up. Manual, item sync or data load.

New Item

Base Information | Supplier | Additional Information | UOM Information | Notes | Custom Field List

Item Information

+ Item No: [] ?

Revision No: []

Location Code: [] ?

+ Price Per UOM: [0] ?

+ Re-order cards when: Open Box (First unit consumed) ?

+ Description: []

+ Handling Time: [0] (in days) ?

ABC Code: []

+ Category: Kanban ?

Lot Number Tracking: None

Coordinator Information

Edit the item information as per your current set-up. Manual, item sync or data load.

Modify Item 10019477Z01

Last modified on [03/11/2014] by [Integration User]

Base Information | Supplier | Additional Information | UOM Information | Notes | Custom Field List

Item Information

+ Item No: 10019477Z01 X ?

Revision No: A

Location Code: 11R00000 ?

+ Price Per UOM: 13.8889 ?

+ Re-order cards when: Open Box (First unit consumed) ?

+ Description: KOSZYK AC3300

+ Handling Time: 0 (in days) ?

ABC Code: C

+ Category: Forecast ?

Lot Number Tracking: None

Coordinator Information

Disable an Item

Click on an “Item” and the line will highlight. Click on the “Disable” button.

The screenshot shows the 'Buyer Material Status' interface. At the top, there are several filter fields: 'Issue tracking' (All Items), 'Show' (All Items X), 'RYG' (All), 'Product Line' (All), 'Supplier', 'Item starts with', 'Category' (All), and 'Commodity Code' (All). A 'Go' button is to the right. A circular progress indicator shows 48.8% Red and 51.2% Green. Below the filters are buttons for 'Add', 'Edit', 'Disable', and 'View Details'. The 'Disable' button is highlighted with a red arrow. Below the buttons is a table with columns: RYG, Item, Units on hand, Daily usage last 15 days, Daily usage last 50 days, Days of material on hand, Next delivery due, Units expected, Projected stock-out, Past due orders, and On Hand Trend. The first row, with Item ID 10019477201, is highlighted in green and has a red arrow pointing to it.

Click on the “Yes” button.

The screenshot shows a confirmation dialog box titled 'Ultriva 7.6 DEMO' with a 'close' button. The text inside the dialog asks 'Do you want to Disable this Item?'. At the bottom, there are two buttons: 'Yes' and 'No'. The 'Yes' button is highlighted with a red arrow.

The item has been “Disabled” and removed from the list.

The screenshot shows the 'Buyer Material Status' interface after the item has been disabled. A blue information message box at the top says 'Item successfully disabled' with a red arrow pointing to it. The circular progress indicator now shows 50.0% Red and 50.0% Green. The table below shows two rows: the first row (Item 10027185) is highlighted in green, and the second row (Item 10033206) is highlighted in light green. The item 10019477201 is no longer present in the table.

View Details



Quick Tip – By clicking on the “View Details” tab, you can view all the needed information for the item selected.

There are 4 tabs to select information from.

Item Details

Kanban Board

Card Details

Kanban Inventory

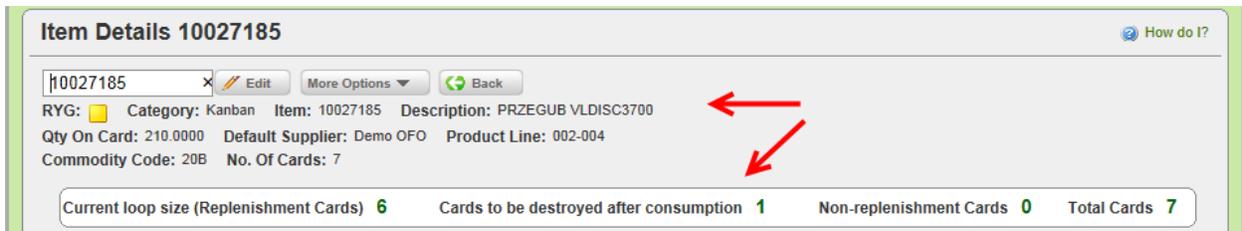
Click on the “Item” number and the line will highlight. Click on the “View Details” tab

The screenshot displays the 'Buyer Material Status' interface. At the top, there are several filter sections: 'Issue tracking' (set to 'All Items'), 'Show' (set to 'All Items'), 'RYG' (set to 'All'), 'Product Line' (set to 'All'), 'Supplier', 'Item starts with', 'Category' (set to 'Kanban'), and 'Commodity Code' (set to 'All'). A 'Go' button is located to the right of these filters. A circular RYG gauge shows 78.0% Green, 4.3% Yellow, and 17.7% Red. Below the filters are buttons for 'Add', 'Edit', 'Disable', and 'View Details'. The main table has columns for RYG, Item, Units on hand, Daily usage last 15 days, Daily usage last 90 days, Days of material on hand, Next delivery due, Units expected, Projected stock-out, Past due orders, and On Hand Trend. The first row (Item 10027185) is highlighted in green, and the 'View Details' button and the 'Item' number are indicated by red arrows.

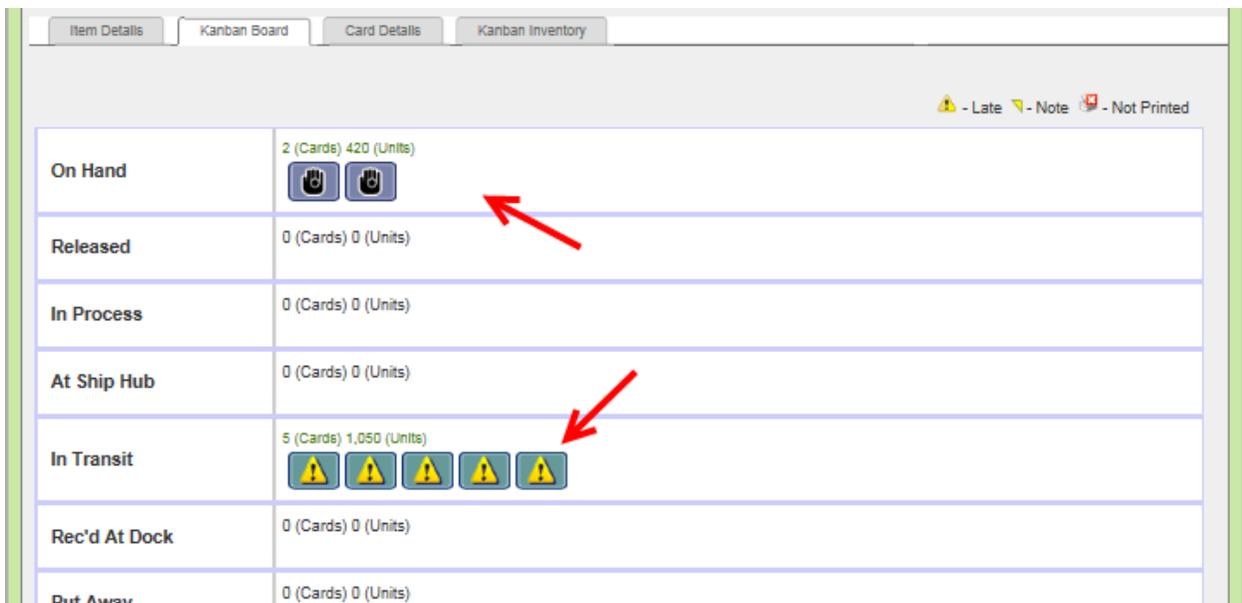
RYG	Item	Units on hand	Daily usage last 15 days	Daily usage last 90 days	Days of material on hand	Next delivery due	Units expected	Projected stock-out	Past due orders	On Hand Trend
Green	10027185	420	266 ↑	259 ↑	1.5789	03/20/2014	1,050		⚠	
Green	10046647	840	373.3333 ↑	308 ↑	2.25	03/24/2014	840		⚠	

Kanban Board (Auto populates when selecting View Details)

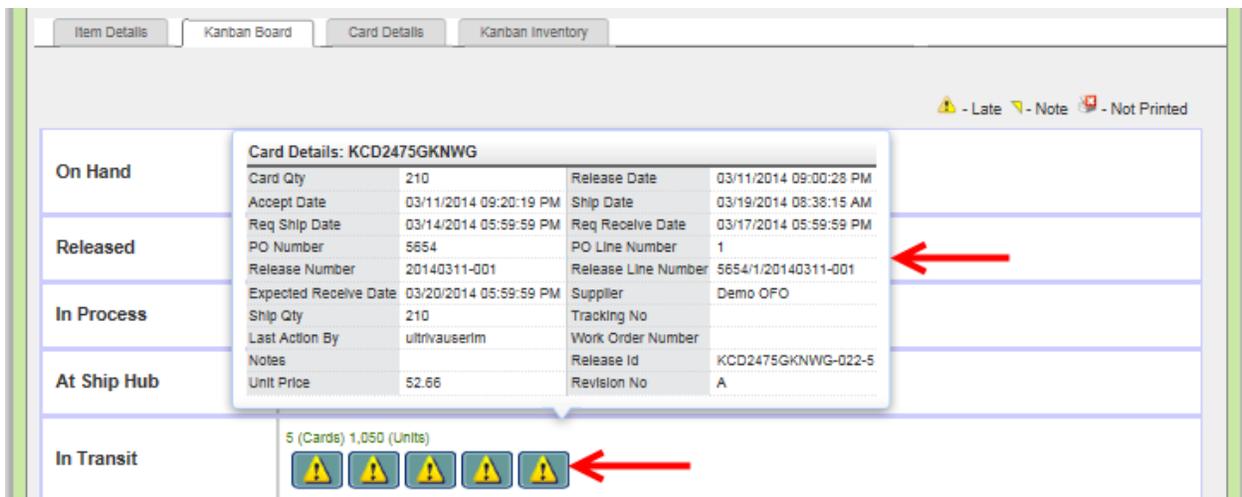
The “**Item Details**” are found at **the top of the screen**.



The “**Kanban Board**” is found at **the bottom of the screen**. This **shows the status of the cards within the loop**.



Hover the mouse over a card icon and the “Card Details” will appear.



Item Details



Quick Tip – The “Item Details” tab, when selected, will navigate to the Admin>Item screen in Ultriva. This is the data that has been entered into the system when you first set up the items. This can be entered manually, through item sync or the data load process. Click on the different tabs to view the information set up for this item.

Base Information	Supplier	Additional Information	UOM Information	Notes	Custom Field List
Item Information					
Item No:	10027185		Description:	PRZEGUB VLDISC3700	
Revision No:	A		Handling Time:	0 (in days)	
Location Code:	11R00000		ABC Code:	A	
Price Per UOM:	52.8824		Category:	Kanban	
Re-order cards when:	Open Box (First unit consumed)		Lot Number Tracking:	None	
Coordinator Information					
Item:	jacek.szczepaniak		Purchase:	appuser	
Usage Information					
Usage Per Day:	250.0551		Safety Time:	2 (in days)	
Quantity On Card:	210				
Group Information					
Product Line:	002-004		Commodity Code:	20B	
Tolerance Information					
Ship Quantity:	0		Receive Qty:	0	
Card Cycle Settings					
Check this box for this item to Wait at dock for inspection - No					
Check this box for this item to Wait for Put Away - No					
Check this box to Force Tolerance for this item - No					
Consignment Item - No					
Do not include this item for Auto Resize - No					
Temporary card will be created for Partial Shipment - No					
Integration Points					
PO Receipt - Yes PO Release - Yes Inventory Movement - No Intermedia Location - No					

Card Details

The “Card Detail” information is as follows:

Card ID

Card Status

Cycle No

Card Qty

Ship Qty

Receive Qty

Last Action Time

Location Code

The **information** can be “**Printed**” and/or “**Exported**” to an **Excel** document. *Click on the link below for detailed instructions to perform these tasks.*

[Tips and Tricks Reference Guide](#)

The screenshot displays the 'Item Details 10027185' page. At the top, there are navigation buttons: 'Edit', 'More Options', and 'Back'. Below this, the item information is shown: RYG: Kanban, Category: Kanban, Item: 10027185, Description: PRZEGUS VLDISC3700, Qty On Card: 210.0000, Default Supplier: Demo OFO, Product Line: 002-004, Commodity Code: 205, No. Of Cards: 7. A summary bar indicates: Current loop size (Replenishment Cards) 6, Cards to be destroyed after consumption 1, Non-replenishment Cards 0, Total Cards 7. Below the summary bar are tabs: 'Item Details', 'Kanban Board', 'Card Details' (highlighted with a red arrow), and 'Kanban Inventory'. In the top right corner of the main content area, there are 'Print' and 'Export' buttons, both enclosed in a red box. The main content area contains a table with the following columns: Card ID, Card State, Cycle No, Card Qty, Ship Qty, Receive Qty, Last Action Time, and Location Code. The table lists seven cards with their respective states and quantities.

Card ID	Card State	Cycle No	Card Qty	Ship Qty	Receive Qty	Last Action Time	Location Code
KCD23G8GKNYW	On Hand	25	210	0	0	03/11/2014 03:05:20 AM	11R00000
KCD244VGKNFM	In Transit	25	210	210	0	03/19/2014 08:38:22 AM	11R00000
KCD2474GKN9D	On Hand	21	210	0	0	03/12/2014 04:05:20 AM	11R00000
KCD2475GKNWG	In Transit	22	210	210	0	03/19/2014 08:38:22 AM	11R00000
KCD24DNGKNJE	In Transit	13	210	210	0	03/19/2014 08:38:22 AM	11R00000
KCD24MYGKNUV	In Transit	5	210	210	0	03/19/2014 08:38:22 AM	11R00000
KCD24PLGKNY7	In Transit	1	210	210	0	03/19/2014 08:38:22 AM	11R00000

Sorted by: Card ID 1 to 7 of 7

Kanban Inventory

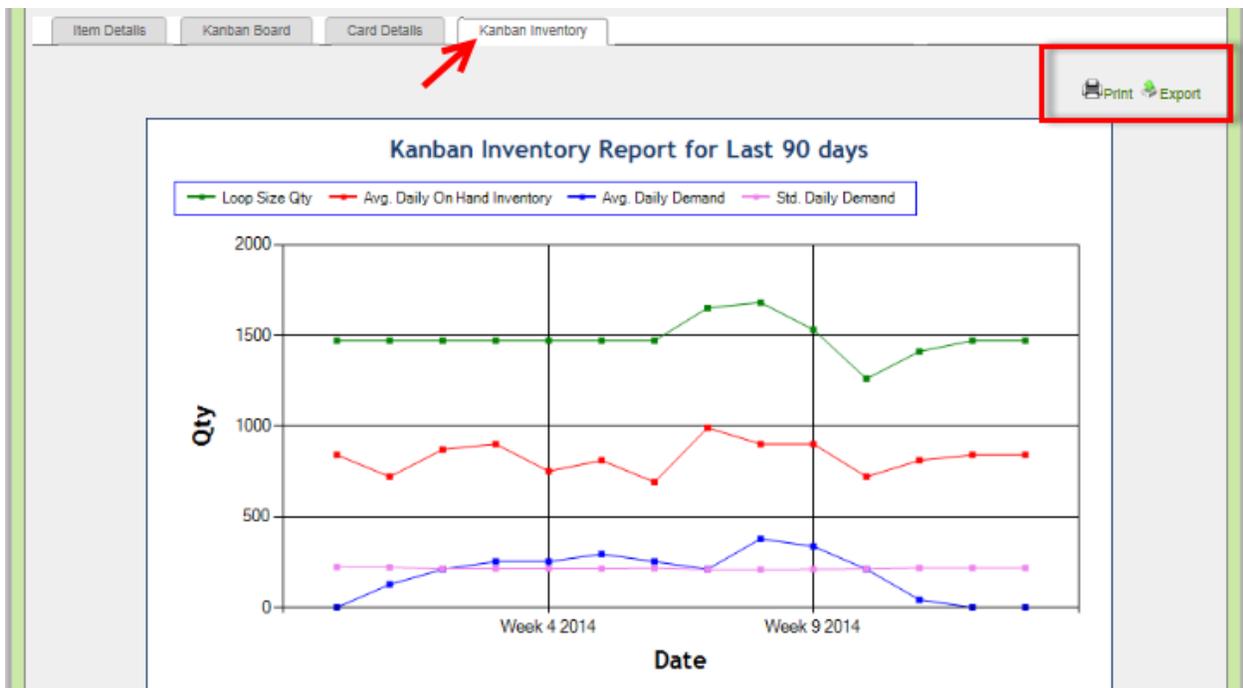
A “**Kanban Inventory Chart**” appears for the **historic data** collected for the last 90 days for this item.

Loop Size Qty – What your loopsize has been during the selected period

Ave. Daily On Hand Inventory – Average Daily on Hand Inventory level during the selected period

Ave Daily Demand – Actual Daily Usage during the selected period

Std Daily Demand – Average Daily Usage entered into Ultriva in the Item Set-Up



“**Loop Size**” data. *Calculates the total cards in the loop and what type of card it is.*

Replenishment Cards

Spike Cards

Non-Replenishment Cards

= Total Cards

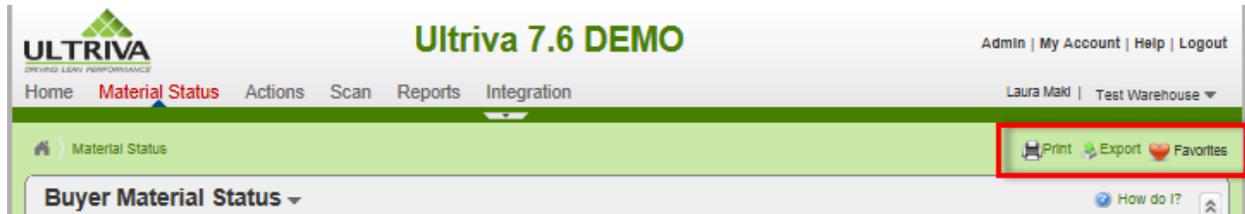
The screenshot displays the 'Item Details' page for item 10027185. The page includes a search bar with the item number, 'Edit', 'More Options', and 'Back' buttons. Below this, it lists item details: RYG (yellow), Category: Kanban, Item: 10027185, Description: PRZEGUB VLDISC3700, Qty On Card: 210.0000, Default Supplier: Demo OFO, Product Line: 002-004, Commodity Code: 20B, and No. Of Cards: 7. A red arrow points to a summary bar that is highlighted with a red border. This bar contains the following information: 'Current loop size (Replenishment Cards) 6', 'Cards to be destroyed after consumption 1', 'Non-replenishment Cards 0', and 'Total Cards 7'. At the bottom of the page, there are four tabs: 'Item Details', 'Kanban Board', 'Card Details', and 'Kanban Inventory'.

Current loop size (Replenishment Cards)	6	Cards to be destroyed after consumption	1	Non-replenishment Cards	0	Total Cards	7
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Print / Export / Favorites



Quick Tip – For detailed instructions on the Print, Export and Favorites features, click on the link below



[Tips and Tricks Reference Guide](#)