



---

# Ultriva 7.6 and Higher Excel Reports Reference Guide

---

## Table of Contents

*(Click to follow link)*

<i>Excel Reports Overview .....</i>	<i>2</i>
<i>Card History .....</i>	<i>3</i>
<i>Card Status.....</i>	<i>7</i>
<i>Consumption Report .....</i>	<i>9</i>
<i>Card Design Report .....</i>	<i>12</i>
<i>Card Audit Report.....</i>	<i>15</i>
<i>Item Usage Report .....</i>	<i>18</i>
<i>Blanket Qty Usage Report .....</i>	<i>20</i>
<i>Outstanding Receive Report .....</i>	<i>22</i>
<i>Supplier Lot Information Report.....</i>	<i>24</i>
<i>Scan Analysis Report .....</i>	<i>27</i>

## Excel Reports Overview



*Quick Tip - Excel Reports are created for the user to extract data from the Ultriva application for further analysis.*

*Internal Reports to extract are:*

*Card History  
Card Status  
Consumption  
Card Design  
Card Audit  
Item Usage Filter  
Blanket Qty Usage  
Outstanding Receive  
Supplier Lot Information  
Scan Analysis*

*Supplier Reports to extract are:*

*Card History  
Card Status  
Outstanding Shipment  
Item Usage  
Consumption  
Lot Information*

*In the Ultriva Help Portal there is a “Reports” Reference guide which has detailed instructions on each one of the reports.*

*Click on the link below to navigate to the Reports Reference Guide.*

[Reports Reference Guide](#)

## Card History



*Quick Tip - This report shows detailed card information. It is a very powerful tool for troubleshooting any issues for a given card.*

*Available Filter Options (Card data) that can be extracted are:*

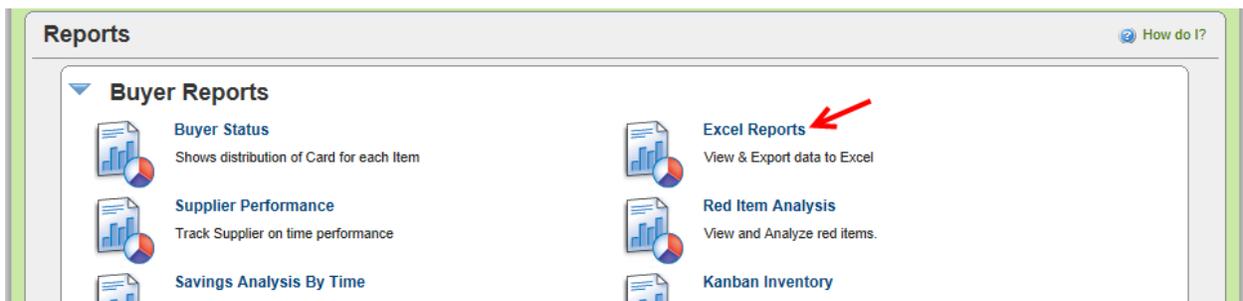
Accepted
Approved
Buyer Reschedule Request
Buyer Reschedule Approved
Buyer Reschedule Denied
Created
Consumed
Destroyed
Recalled
Received
Rejected
Released
Shipped
Supplier Reschedule Request
Supplier Reschedule Approved
Supplier Reschedule Denied
In Cycle



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



Click on “Excel Reports”



The “Card History” set-up screen appears. The example: What cards have been “Released” to a “Supplier” in the “Current Week”

Excel Reports How do I?

Card History

\* Date Range: 02/13/2014-02/13/2014

Card:

Supplier:

Product Line:

Commodity Code:

Item:

Coordinator:

Action: Accepted

Show Report | » Schedule Report | »

Click in the “Date Range” field and a drop down box appears with the “Date” selections. Click on the selection. This example we will select “Current Week”

Card History

\* Date Range: 02/13/2014-02/13/2014

Card:

Supplier:

Product Line:

Commodity Code:

Item:

Coordinator:

Action:

report | » Schedule Report | »

Card Status

Today

Current Week

Month To Date

Year To Date

Previous Week

Previous Month

Previous Year

Past 7 Days

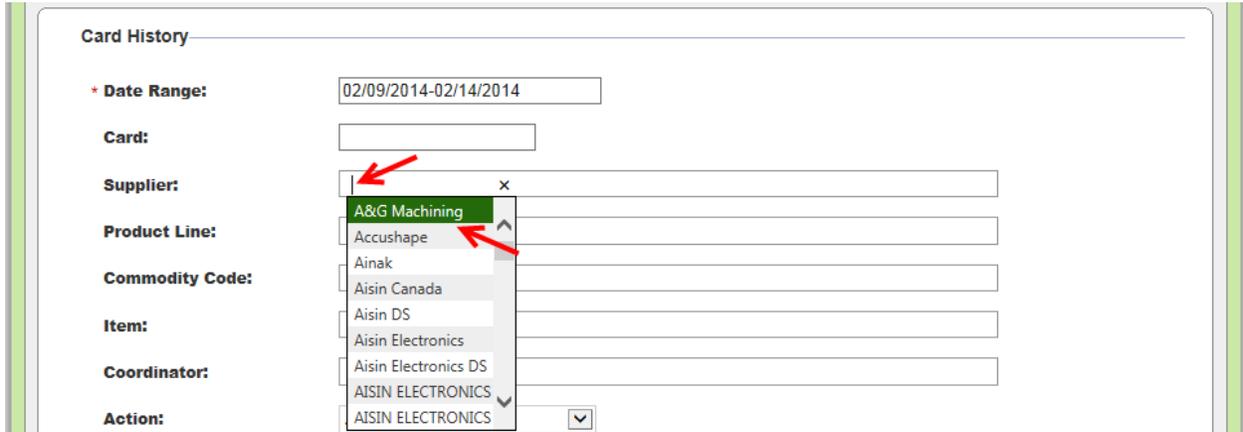
Past 3 Months

Past One Year

Yesterday

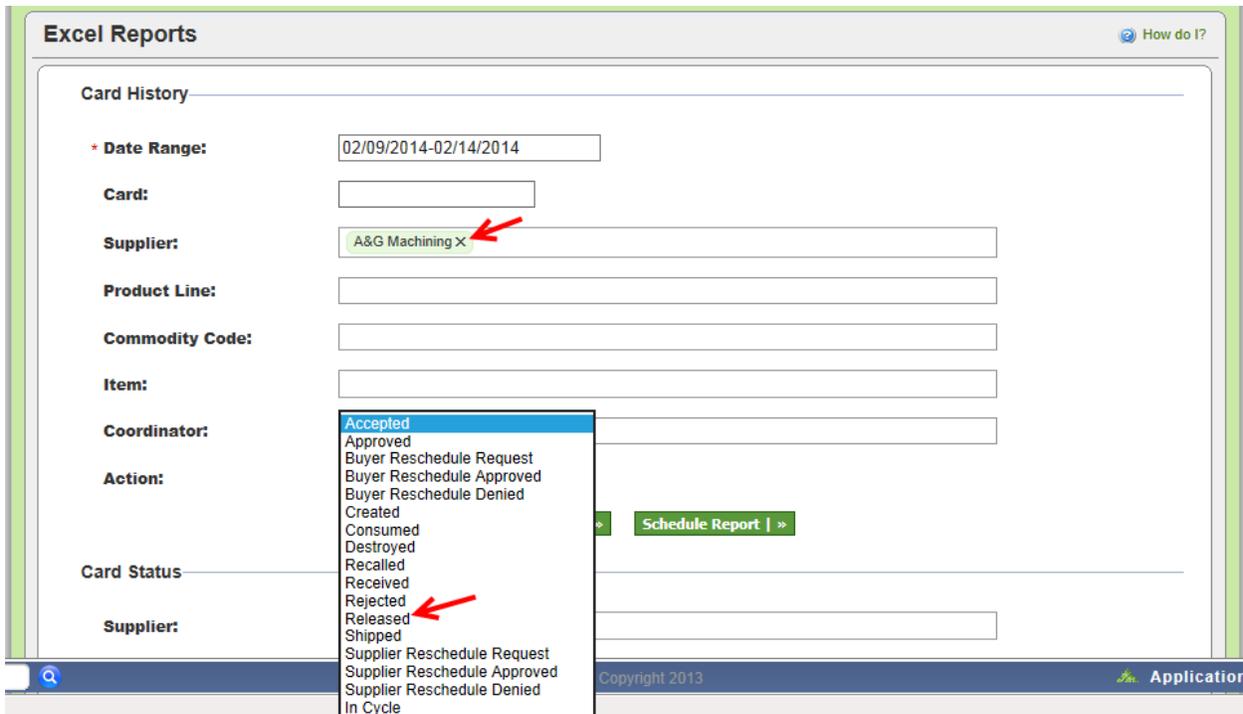
Date Range

Click in the “Supplier” field and press on the “spacebar”. A dropdown list appears of “All Suppliers”, click on the “Supplier”.



The screenshot shows the 'Card History' form with the following fields: Date Range (02/09/2014-02/14/2014), Card, Supplier (dropdown), Product Line, Commodity Code, Item, Coordinator, and Action. The 'Supplier' dropdown menu is open, showing a list of suppliers: A&G Machining (highlighted), Accushape, Ainak, Aisin Canada, Aisin DS, Aisin Electronics, Aisin Electronics DS, AISIN ELECTRONICS, and AISIN ELECTRONICS. Red arrows point to the 'Supplier' field and the 'A&G Machining' option in the dropdown.

The “Supplier” name appears. Click on the drop down arrow in the “Actions” field and a dropdown box appears with a list of “All Actions” that can be chosen for the report. Click on the “Action” In this example we will select “Released”



The screenshot shows the 'Excel Reports' form with the following fields: Date Range (02/09/2014-02/14/2014), Card, Supplier (A&G Machining x), Product Line, Commodity Code, Item, Coordinator, and Action. The 'Action' dropdown menu is open, showing a list of actions: Accepted, Approved, Buyer Reschedule Request, Buyer Reschedule Approved, Buyer Reschedule Denied, Created, Consumed, Destroyed, Recalled, Received, Rejected, Released (highlighted), Shipped, Supplier Reschedule Request, Supplier Reschedule Approved, Supplier Reschedule Denied, and In Cycle. A 'Schedule Report | >>' button is visible. Red arrows point to the 'Supplier' field and the 'Released' option in the dropdown.



*Quick Tip – If information is needed for all “Opened Orders” at a supplier, the “In Cycle” report would give this information.*

Click on the “Show Report” button.

Card History

\* Date Range: 02/09/2014-02/14/2014

Card:

Supplier: A&G Machining X

Product Line:

Commodity Code:

Item:

Coordinator:

Action: Released

 **Show Report** | » **Schedule Report** | »

If Applicable: Click on the “Open” button.

Do you want to open or save CardHistoryExcel.xls (159 KB) from demo.ultrivalms.com?

 **Open** **Save** **Cancel**

Click on the “Yes” button.

Microsoft Office Excel

 The file you are trying to open, 'CardHistoryExcel.xls', is in a different format than specified by the file extension. Verify that the file is not corrupted and is from a trusted source before opening the file. Do you want to open the file now?

 **Yes** **No** **Help**

The “Report” appears. You can now find what cards were “Released”, from this “Supplier” for this “Current Week”

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	Plant Cod	Plant Nam	Item No	Card ID	Release D	Released	Accept Da	Accepted	Quarantin	Quarantin	Quarantin	Reqd Ship	Ship Date	Shipped B	Ship Qty	Reqd Recv	Receive D	Received	Receive Q
2	TOYB	TBJ	24680	KCD4MV6	02/14/201	makil	02/14/201	makil	-	appuser	50	02/17/201-	-	appuser	0	02/19/201-	-	appuser	0
3	TOYB	TBJ	24680	KCD4MV7	02/13/201	makil	02/14/201	makil	-	appuser	50	02/14/201-	-	appuser	0	02/18/201-	-	appuser	0
4	TOYB	TBJ	24680	KCD4MV8	02/14/201	makil	02/14/201	makil	-	appuser	0	02/17/201-	-	appuser	0	02/19/201-	-	appuser	0
5	TOYB	TBJ	24680	KCD4MVG	02/14/201	makil	02/14/201	makil	-	appuser	50	02/17/201-	-	appuser	0	02/19/201-	-	appuser	0
6	TOYB	TBJ	24680	KCD4MVK	02/14/201	makil	02/14/201	makil	-	appuser	50	02/17/201-	-	appuser	0	02/19/201-	-	appuser	0
7	TOYB	TBJ	24681	KCD4N2X	02/12/201	makil	02/12/201	makil	-	appuser	0	02/13/201	02/14/201	makil	25	02/14/201	02/14/201	makil	25
8	TOYB	TBJ	24681	KCD4N2Y	02/12/201	makil	02/12/201	makil	-	appuser	0	02/13/201	02/14/201	makil	25	02/14/201	02/14/201	makil	25
9	TOYB	TBJ	24681	KCD4N2Z	02/12/201	makil	02/12/201	makil	-	appuser	0	02/13/201	02/14/201	makil	25	02/14/201	02/14/201	makil	25
10	TOYB	TBJ	24681	KCD4N3C	02/12/201	makil	02/12/201	makil	-	appuser	0	02/13/201	02/14/201	makil	25	02/14/201	02/14/201	makil	25
11	TOYB	TBJ	24681	KCD4N3C	02/12/201	makil	02/12/201	makil	-	appuser	0	02/13/201	02/14/201	makil	25	02/14/201	02/14/201	makil	25
12	TOYB	TBJ	24681	KCD4N3C	02/12/201	makil	02/12/201	makil	-	appuser	0	02/13/201	02/14/201	makil	25	02/14/201	02/14/201	makil	25
13	TOYB	TBJ	24681	KCD4N3C	02/12/201	makil	02/12/201	makil	-	appuser	0	02/13/201	02/14/201	makil	25	02/14/201	02/14/201	makil	25
14	TOYB	TBJ	24681	KCD4N3C	02/12/201	makil	02/12/201	makil	-	appuser	0	02/13/201	02/14/201	makil	25	02/14/201	02/14/201	makil	25
15	TOYB	TBJ	24681	KCD4N3C	02/12/201	makil	02/12/201	makil	-	appuser	0	02/13/201	02/14/201	makil	25	02/14/201	02/14/201	makil	25
16	TOYB	TBJ	24681	KCD4N3C	02/12/201	makil	02/12/201	makil	-	appuser	0	02/13/201	02/14/201	makil	25	02/14/201	02/14/201	makil	25
17	TOYB	TBJ	24681	KCD4N3D	02/14/201	makil	02/14/201	makil	-	appuser	0	02/17/201-	-	appuser	0	02/19/201-	-	appuser	0
18	TOYB	TBJ	24681	KCD4N3E	02/13/201	lmceely	02/14/201	makil	-	appuser	0	02/14/201-	-	appuser	0	02/18/201-	-	appuser	0
19	TOYB	TBJ	24681	KCD4N3G	02/13/201	lmceely	02/14/201	makil	-	appuser	0	02/14/201-	-	appuser	0	02/18/201-	-	appuser	0
20	TOYB	TBJ	24681	KCD4N3H	02/14/201	makil	02/14/201	makil	-	appuser	0	02/17/201-	-	appuser	0	02/19/201-	-	appuser	0
21	TOYB	TBJ	24681	KCD4N3J	02/14/201	makil	02/14/201	makil	-	appuser	0	02/17/201-	-	appuser	0	02/19/201-	-	appuser	0
22	TOYB	TBJ	24681	KCD4N3C	02/14/201	makil	02/14/201	makil	-	appuser	0	02/17/201-	-	appuser	0	02/19/201-	-	appuser	0

## Card Status

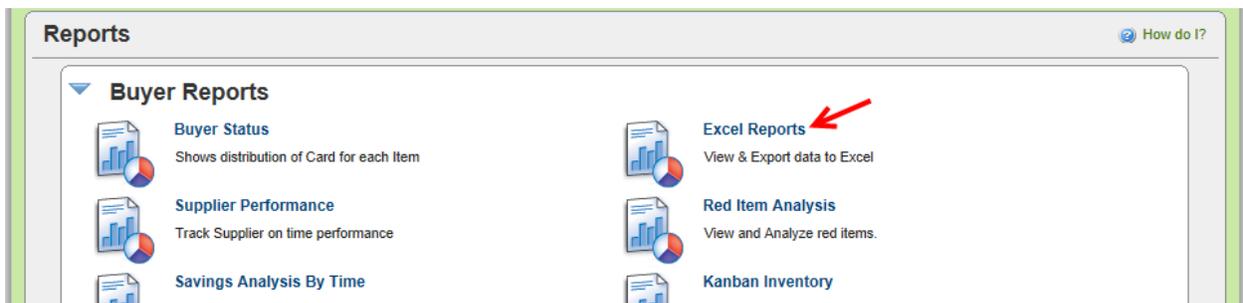


*Quick Tip - This report is similar to the “Buyer Status” report where you can view where each card is located in the loop. This will be in an Excel format.*

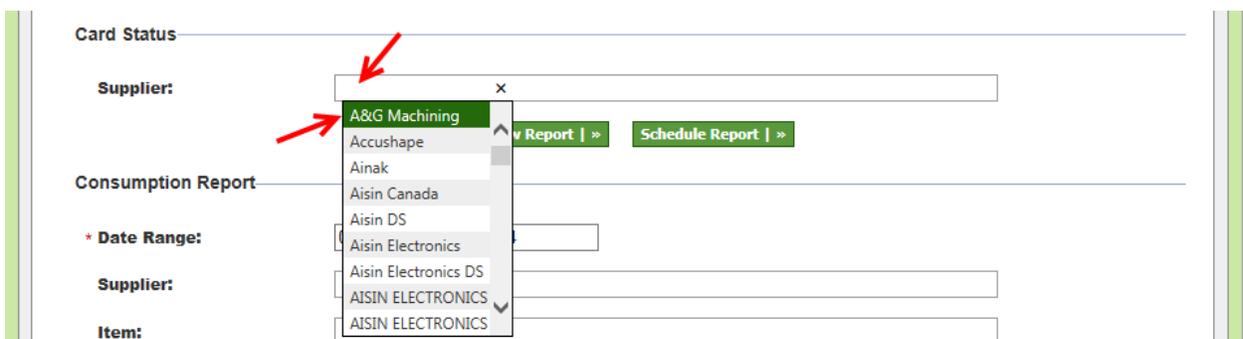
To navigate to the “Excel Reports”, click on “Reports”



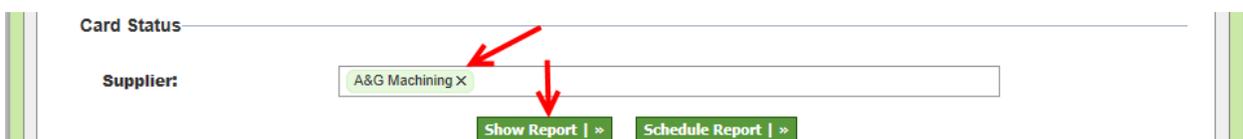
Click on “Excel Reports”



Click in the “Supplier” field and press the “Spacebar”. A dropdown list appears with a list of all “Suppliers”. Click on the “Supplier”.



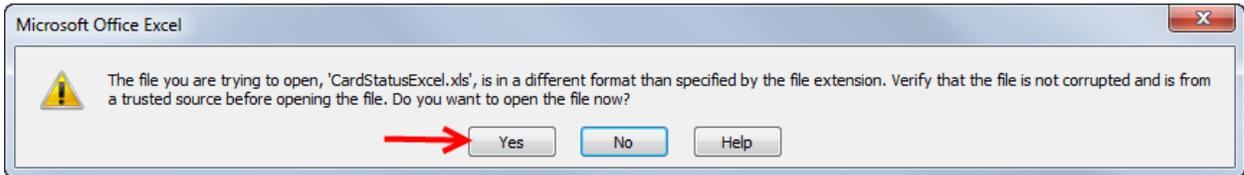
The “Supplier” appears. Click on the “Show Report” button.



If Applicable: **Click** on the “**Open**” button.



**Click** on the “**Yes**” button.



The “**Report**” appears. *This will show the entire loop of the cards, by item and which state within the loop the cards are in.*

Item No	Supplier Name	Category	Qty On Card	No. Of Cards	KanbanInventory	Cards On Hand	Released Cards	In Process Cards	Shipped Cards	Received Cards	Supplier Total Cards	Supplier Card Total Qty	Units On Hand	Plant Name	Supplier Item No
24680	A&G Machining	Kanban	50	20	1000	15	0	5	0	0	5	250	750	TBJ	24680
24681	A&G Machining	Kanban	25	45	1125	39	0	6	0	0	6	150	975	TBJ	24681

## Consumption Report

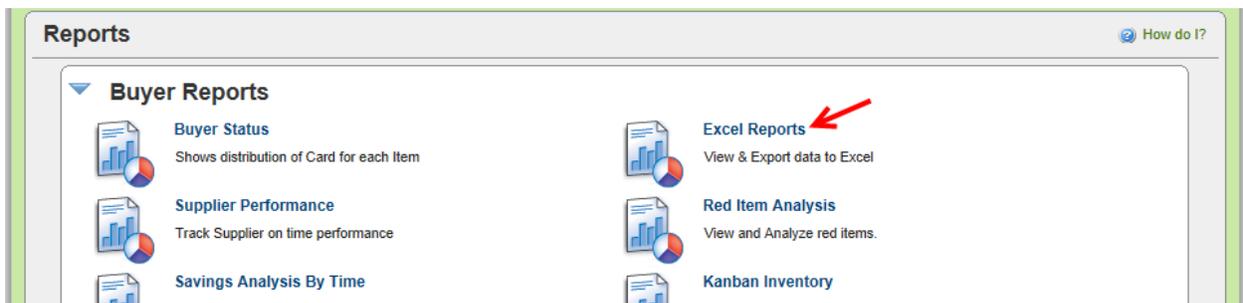


*Quick Tip – This report shows “Consumption” data for “All” of the items or just the “Consignment” items. This is beneficial for “Consignment Items” when looking to “Invoice” for a specified period of time.*

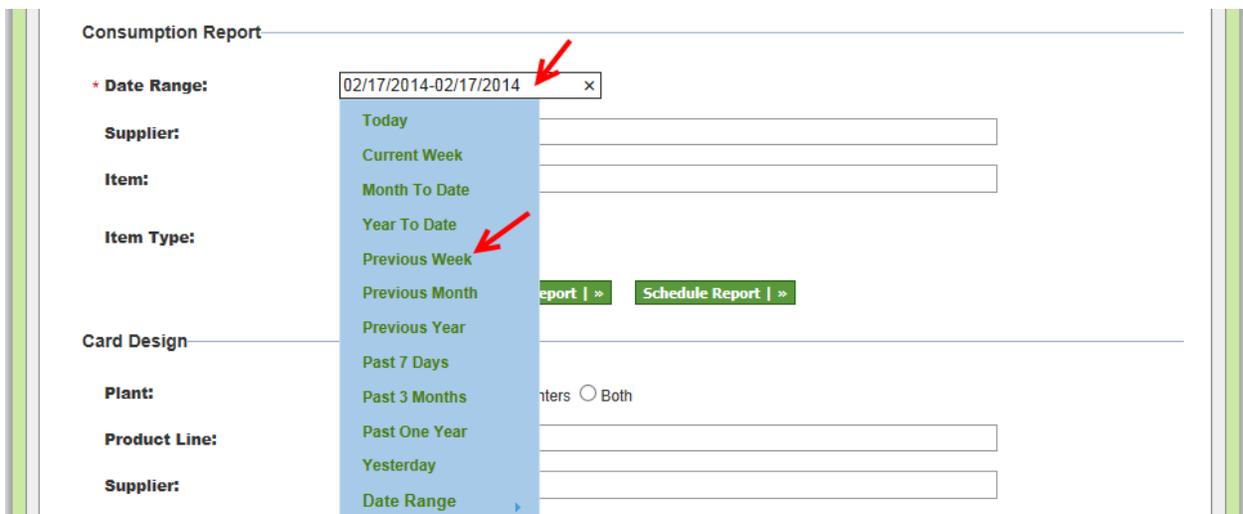
To navigate to the “Excel Reports”, click on “Reports”



Click on “Excel Reports”



Click in the “Date Range” field and a drop down list appears. Click on the “Date Range”



If Applicable: Click in the “Supplier” field and a dropdown box appears. Click on the “Supplier”

The screenshot shows the 'Consumption Report' form with the following fields: Date Range (02/09/2014-02/15/2014), Supplier (A&G Machining), Item (empty), Item Type (empty), and Card Design (empty). A dropdown menu is open for the Supplier field, listing various suppliers. Red arrows point to the 'A&G Machining' option in the dropdown and the 'Supplier' field. Buttons for 'Show Report' and 'Schedule Report' are visible to the right of the dropdown.

The “Supplier” appears. If Applicable: Click in the “Item” field and a dropdown box appears. Click on the “Item”

The screenshot shows the 'Consumption Report' form with the following fields: Date Range (02/09/2014-02/15/2014), Supplier (A&G Machining), Item (24680), Item Type (empty), and Card Design (empty). A dropdown menu is open for the Item field, listing various item numbers. Red arrows point to the '24680' option in the dropdown and the 'Item' field. Buttons for 'Show Report' and 'Schedule Report' are visible to the right of the dropdown. A 'Plant' field with a radio button for 'Centers' is also visible.

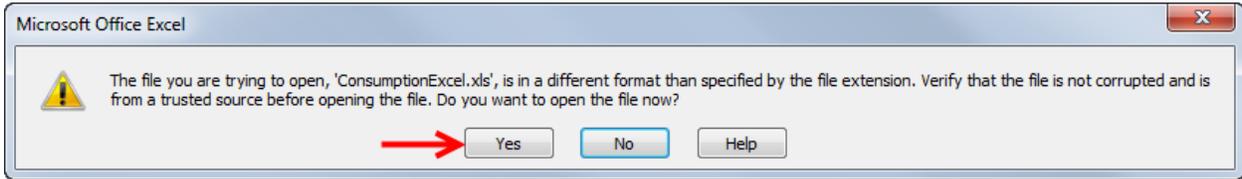
The “Item” appears. Select the “Item Type”. Click on the “Show Report” button.

The screenshot shows the 'Consumption Report' form with the following fields: Date Range (02/09/2014-02/15/2014), Supplier (A&G Machining), Item (24680), and Item Type (All Items). Red arrows point to the 'All Items' radio button, the 'Show Report' button, and the 'Item' field. The 'Schedule Report' button is also visible.

If Applicable: Click on the “Open” button.



Click on the “Yes” button.



The “Report” appears for all “Cards Consumed” within the “Date Range”

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
	Item No	Description	Card ID	Cycle No	Card State	Card Qty	ConsumptionDate	Last Received Date	Consumed Qty	Supplier PONum	Supplier POLineNum	Supplier Name	Product Line Title	Commodity Code	Supplier Item No.	Tracking No	Plant Name	Packing Slip No	
1	24680	Widget	KCD4MV6CNA8	5	Consumed	50	02/14/2014	02/14/2014	50	254136	0	iG MachinEvolutions Unknown			24680		TBJ	989898	
2	24680	Widget	KCD4MV7CNA5	8	Consumed	50	02/13/2014	-	0	684568	1000	iG MachinEvolutions Unknown			24680		TBJ		
3	24680	Widget	KCD4MV8CNAEP	4	Consumed	50	02/14/2014	02/14/2014	50	684258	3000	iG MachinEvolutions Unknown			24680		TBJ	989898	
4	24680	Widget	KCD4MV8CNAEP	4	Consumed	50	02/14/2014	02/14/2014	50	684258	3000	iG MachinEvolutions Unknown			24680		TBJ	989898	
5	24680	Widget	KCD4MV8CNAEP	4	Consumed	50	02/14/2014	02/14/2014	50	684258	3000	iG MachinEvolutions Unknown			24680		TBJ	679135	
6	24680	Widget	KCD4MV8CNAEP	4	Consumed	50	02/14/2014	02/14/2014	50	684258	3000	iG MachinEvolutions Unknown			24680		TBJ	989898	
7	24680	Widget	KCD4MV8CNAEP	4	Consumed	50	02/14/2014	02/14/2014	50	684258	3000	iG MachinEvolutions Unknown			24680		TBJ	989898	
8	24680	Widget	KCD4MV8CNAEP	4	Consumed	50	02/14/2014	02/14/2014	50	684258	3000	iG MachinEvolutions Unknown			24680		TBJ	679135	
9	24680	Widget	KCD4MV8CNAEP	4	Consumed	50	02/14/2014	02/14/2014	50	684258	3000	iG MachinEvolutions Unknown			24680		TBJ	679135	
10	24680	Widget	KCD4MV8CNAEP	4	Consumed	50	02/14/2014	02/14/2014	50	684258	3000	iG MachinEvolutions Unknown			24680		TBJ	679135	
11	24680	Widget	KCD4MV8CNAEP	4	Consumed	50	02/14/2014	02/14/2014	50	684258	3000	iG MachinEvolutions Unknown			24680		TBJ	497613	

## Card Design Report

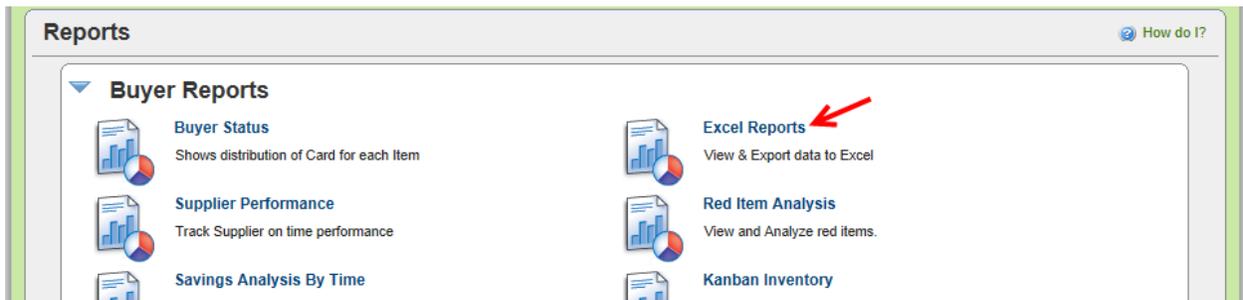


*Quick Tip – This report gives “details” of the “Kanban Sizing” (how the item has been set-up) for each item. This is a great tool when setting up new “Items” or reviewing existing items to verify that the item is set-up correctly.*

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



Click on “Excel Reports”



Make a selection in the “Plant” fields.

Card Design \_\_\_\_\_

**Plant:**  This Plant  Work Centers  Both

**Product Line:**

**Supplier:**

If Applicable: Click in the “Product Line” field and a drop down box appears. Click on the “Product Line”

Card Design

Plant:  This Plant  Work Centers  Both

Product Line:

Supplier:

Card Audit

Product Line:

Commodity Code:

53F 5G  
53F 5G Castings  
5G USD's  
63F 5G  
Bearings  
Hi Temp  
Quest Scroll Sets  
Stampings  
U/T Solenoids

Show Report | » Schedule Report | »

If Applicable: Click in the “Supplier” field and a drop down box appears. Click on the “Supplier”

Card Design

Plant:  This Plant  Work Centers  Both

Product Line:

Supplier:

Card Audit

Product Line:

Commodity Code:

Card ID:

A&G Machining  
Accushape  
Ainak  
Aisin Canada  
Aisin DS  
Aisin Electronics  
Aisin Electronics DS  
AISIN ELECTRONICS  
AISIN ELECTRONICS

Show Report | » Schedule Report | »

The “Supplier” appears. Click on the “Show Report” button.

Card Design

Plant:  This Plant  Work Centers  Both

Product Line:

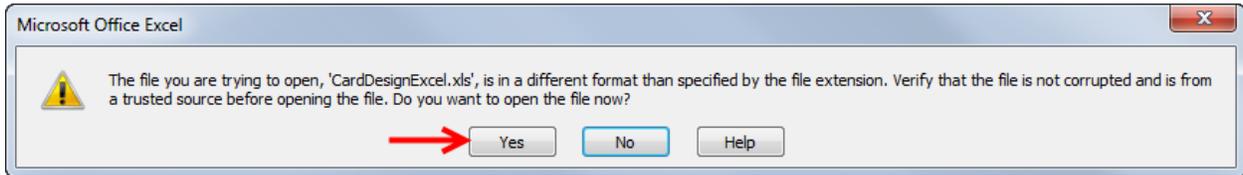
Supplier:

Show Report | » Schedule Report | »

If Applicable: Click on the “Open” button.



Click on the “Yes” button.



The “Report” appears with the current **information** for each item as set in the “Item Setup”

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	PartNumber	Description	DailyDemand	OrderCycle	LeadTime	TransitTime	SafetyTime	Qty On Card	TotalCards	Calculatec	CurrentLo	CardsToBe	NonReple	Commodi	Supplier	Coordinat	Product Li	ABCCode	Locatic
2	24680	Widget	100	0.5	1	1	5	50	20	15	15	0	5	Unknown	A&G Mach	makil	Evolution: A	STK	
3	24681	Widget 2	150	0.5	1	1	3	25	45	33	45	0	0	Unknown	A&G Mach	makil	Evolution: C	STK	
4																			

## Card Audit Report

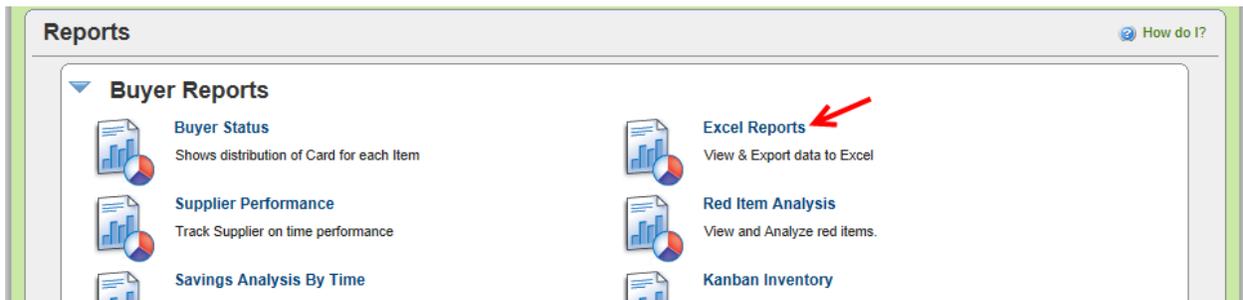


*Quick Tip – This report allows you to view all of the cards/quantities and where they are located within the loop. This is a great tool for verifying the correct inventory for the “On Hand” status within you facility.*

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



Click on “Excel Reports”



*Quick Tip – There are many “Filters” options to select from. Filters are all optional. The “Filter” for this example will be the “Supplier” filter.*

Click in the “Supplier” field and press on the spacebar. A list of “Suppliers” appear  
Click on the “Supplier”

Card Audit

Product Line:

Commodity Code:

Card ID:

Item:

Supplier:  x

Location Code:  To:

Action:

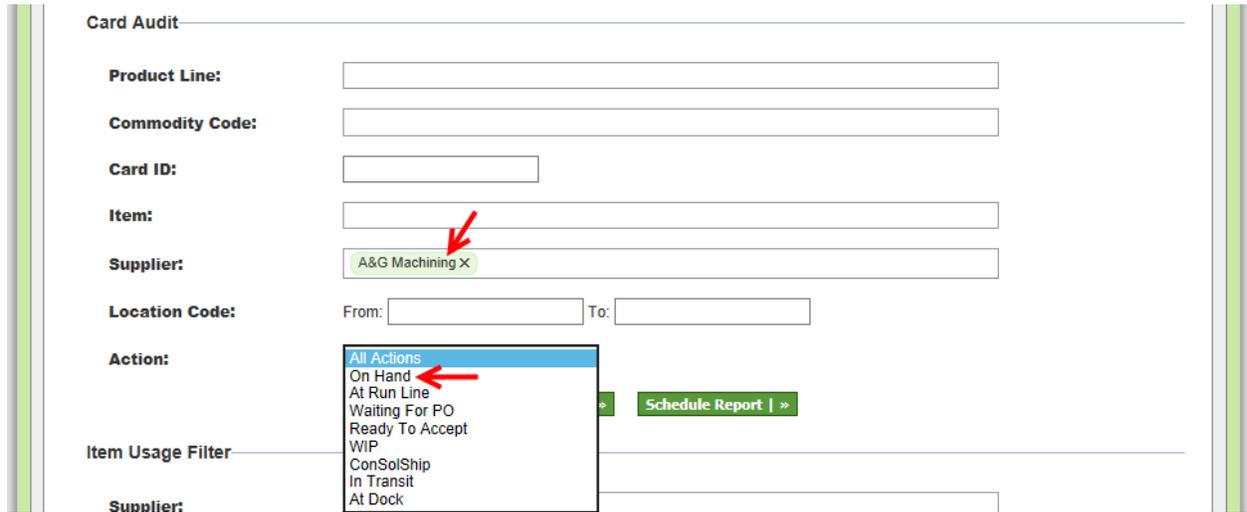
Item Usage Filter:

Suppliers:

- A&G Machining
- Accushape
- Ainak
- Aisin Canada
- Aisin DS
- Aisin Electronics
- Aisin Electronics DS
- AISIN ELECTRONICS
- AISIN ELECTRONICS

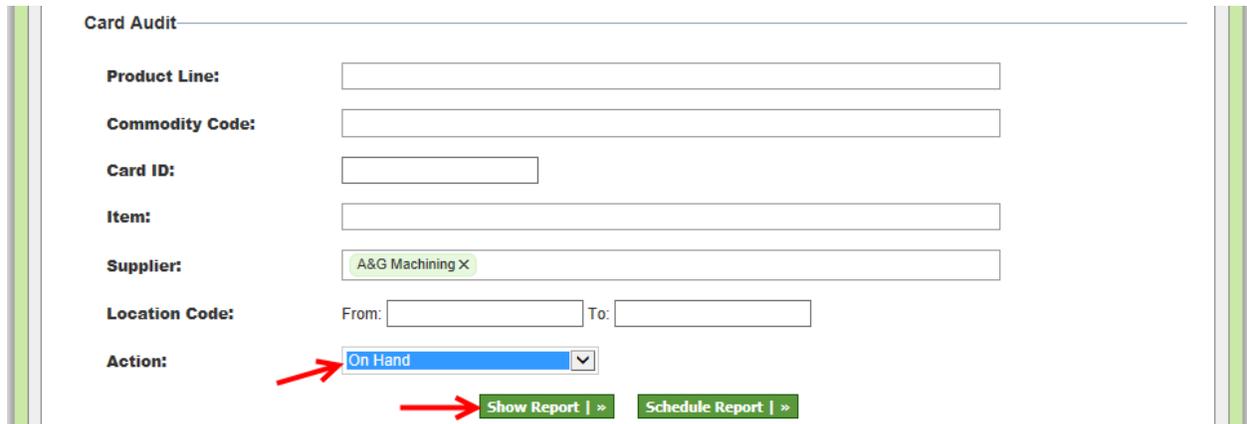
View Report | » Schedule Report | »

The “Supplier” appears. **Click** on the **drop down arrow** in the “Actions” field. **Click** on the “Action” For *this example we will select “On Hand”*



The screenshot shows the 'Card Audit' form with the following fields: Product Line, Commodity Code, Card ID, Item, Supplier (A&G Machining), and Location Code (From/To). The 'Action' dropdown menu is open, showing options: All Actions, On Hand, At Run Line, Waiting For PO, Ready To Accept, WIP, ConSolShip, In Transit, and At Dock. A red arrow points to the 'On Hand' option. To the right of the dropdown is a 'Schedule Report | »' button.

The “Selection” appears. **Click** on the “Show Report” button.



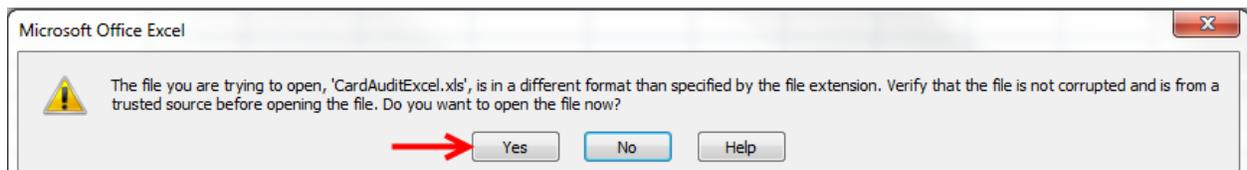
The screenshot shows the 'Card Audit' form with the 'Action' dropdown menu set to 'On Hand'. A red arrow points to the 'On Hand' selection. Below the dropdown are two buttons: 'Show Report | »' and 'Schedule Report | »'. A red arrow points to the 'Show Report | »' button.

*If Applicable:* **Click** on the “Open” button.



The screenshot shows a file dialog box with the text: 'Do you want to open or save CardAuditExcel.xls (176 KB) from demo.ultrivalms.com?'. The 'Open' button is highlighted with a red arrow.

**Click** on the “Yes” button.



The screenshot shows a Microsoft Office Excel warning dialog box with the text: 'The file you are trying to open, 'CardAuditExcel.xls', is in a different format than specified by the file extension. Verify that the file is not corrupted and is from a trusted source before opening the file. Do you want to open the file now?'. The 'Yes' button is highlighted with a red arrow.

The “Report” appears with a list of all of the cards “On Hand” from the selected “Supplier”

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S			
1	Item No	Descript	CardID	State	Product Li	Commodi	Cycle No	Card Qty	Location	C Card	Local	Supplier /	Supplier/I	Release ID	PO Numbr	PO Line N	Release N	Release Li	Packing SI	Last Actio	PI	
2	24680	Widget	KCD4MV9	OnHand	Evolution: Unknown		4	50	STK	STK	A&G Macf	147258	KCD4MV9CNARJ-004-0			0				02/14/201	TE	
3	24680	Widget	KCD4MVA	OnHand	Evolution: Unknown		4	50	STK	STK	A&G Macf	147258	KCD4MVACNAN5-004-0			0					02/14/201	TE
4	24680	Widget	KCD4MVC	OnHand	Evolution: Unknown		5	50	STK	A1	A&G Macf	147258	KCD4MVCCNAJA-005-0			0					02/14/201	TE
5	24680	Widget	KCD4MVD	OnHand	Evolution: Unknown		6	50	STK	STK	A&G Macf	147258	KCD4MVDCNAPK-006-9			0					02/14/201	TE
6	24680	Widget	KCD4MVE	OnHand	Evolution: Unknown		4	50	STK	STK	A&G Macf	147258	KCD4MVECNAGN-004-1			0					02/14/201	TE
7	24680	Widget	KCD4MVF	OnHand	Evolution: Unknown		4	50	STK	STK	A&G Macf	147258	KCD4MVFCAKU-004-6			0					02/14/201	TE
8	24680	Widget	KCD4MVH	OnHand	Evolution: Unknown		6	50	STK	STK	A&G Macf	147258	KCD4MVHCNAA8-006-4			0					02/14/201	TE
9	24680	Widget	KCD4MVJ	OnHand	Evolution: Unknown		4	50	STK	STK	A&G Macf	147258	KCD4MVJCNAE4-004-2			0					02/14/201	TE
10	24680	Widget	KCD4MVL	OnHand	Evolution: Unknown		5	50	STK	STK	A&G Macf	147258	KCD4MVLCNALY-005-3			0					02/14/201	TE
11	24680	Widget	KCD4MVL	OnHand	Evolution: Unknown		6	50	STK	STK	A&G Macf	147258	KCD4MVMCNABV-006-0			0					02/14/201	TE
12	24680	Widget	KCD4NG8	OnHand	Evolution: Unknown		1	50	STK	STK	A&G Macf	147258	KCD4NG8CNAAB-001-7			0					02/14/201	TE
13	24680	Widget	KCD4NG9	OnHand	Evolution: Unknown		1	50	STK	STK	A&G Macf	147258	KCD4NG9CNAME-001-2			0					02/14/201	TE
14	24680	Widget	KCD4NGA	OnHand	Evolution: Unknown		1	50	STK	STK	A&G Macf	147258	KCD4NGACNAJZ-001-7			0					02/14/201	TE
15	24680	Widget	KCD4NGB	OnHand	Evolution: Unknown		1	50	STK	STK	A&G Macf	147258	KCD4NGBCNAHK-001-2			0					02/14/201	TE
16	24680	Widget	KCD4NGC	OnHand	Evolution: Unknown		1	50	STK	STK	A&G Macf	147258	KCD4NGCCNANN-001-1			0					02/14/201	TE
17	24681	Widget 2	KCD4N2T	OnHand	Evolution: Unknown		2	25	STK	STK	A&G Macf	147258	KCD4N2TCNAJF-002-0			0					02/14/201	TE
18	24681	Widget 2	KCD4N2U	OnHand	Evolution: Unknown		2	25	STK	STK	A&G Macf	147258	KCD4N2UCNADA-002-1			0					02/14/201	TE
19	24681	Widget 2	KCD4N2V	OnHand	Evolution: Unknown		3	25	STK	STK	A&G Macf	147258	KCD4N2VCNAN8-003-6			0					02/14/201	TE
20	24681	Widget 2	KCD4N2W	OnHand	Evolution: Unknown		3	25	STK	STK	A&G Macf	147258	KCD4N2WCNAH5-003-1			0					02/14/201	TE
21	24681	Widget 2	KCD4N2X	OnHand	Evolution: Unknown		3	25	STK	STK	A&G Macf	147258	KCD4N2XCNAFP-003-0			0					02/14/201	TE
22	24681	Widget 2	KCD4N2Y	OnHand	Evolution: Unknown		3	25	STK	STK	A&G Macf	147258	KCD4N2YCNAQJ-003-6			0					02/14/201	TE
23	24681	Widget 2	KCD4N2Z	OnHand	Evolution: Unknown		3	25	STK	STK	A&G Macf	147258	KCD4N2ZCNABY-003-8			0					02/14/201	TE
24	24681	Widget 2	KCD4N32	OnHand	Evolution: Unknown		3	25	STK	STK	A&G Macf	147258	KCD4N32CNAV4-003-0			0					02/14/201	TE
25	24681	Widget 2	KCD4N33	OnHand	Evolution: Unknown		3	25	STK	STK	A&G Macf	147258	KCD4N33CNA29-003-1			0					02/14/201	TE



**Quick Tip** – With having the “On Hand” and the “Release I.D.” information, you can now verify that you have the correct inventory in the “On Hand” location.

## Item Usage Report

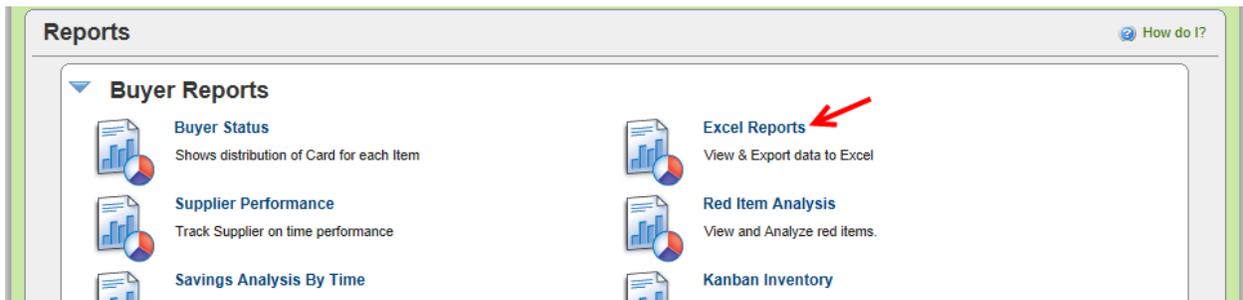


*Quick Tip – This report shows the “Usage” data by month. The “Suppliers” have access to this report as well, and can view “Actual” usage by item.*

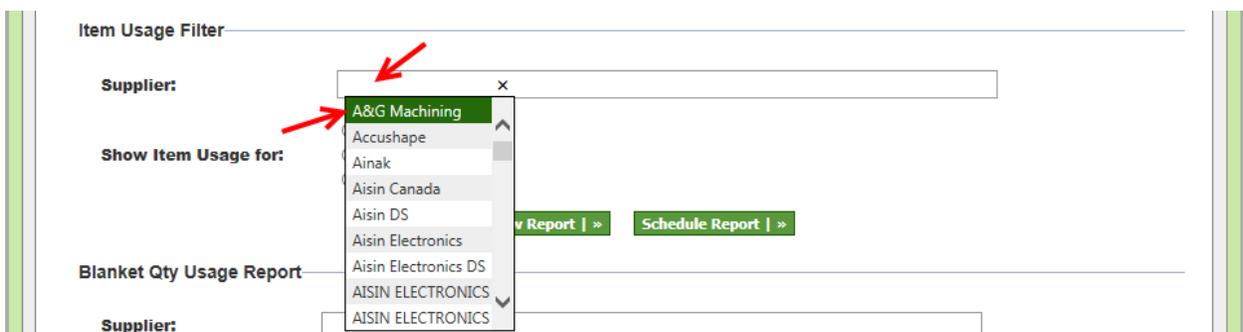
To navigate to the “Excel Reports”, click on “Reports”



Click on “Excel Reports”



Click in the “Supplier” field and press on the spacebar. A list of “Suppliers” appear  
Click on the “Supplier”



The “Supplier” appears. Select a “Show Item Usage for:” option. Click on the “Show Report” button.

Item Usage Filter

Supplier: A&G Machining X

Show Item Usage for:

Year To Date

Last Year

Last 12 Months

Show Report | >> Schedule Report | >>

If Applicable: Click on the “Open” button.

Do you want to open or save ItemUsageExcel.xls (4.05 KB) from demo.ultrivalms.com?

Open Save Cancel X

Click on the “Yes” button.

Microsoft Office Excel

The file you are trying to open, 'ItemUsageExcel.xls', is in a different format than specified by the file extension. Verify that the file is not corrupted and is from a trusted source before opening the file. Do you want to open the file now?

Yes No Help

The “Report” appears. The “Report” shows all usage by month for the selected timeframe.

Supplier	ItemNo	Descriptio	UsagePerf	Coordinat	Jan2013	Feb2013	Mar2013	Apr2013	May2013	Jun2013	Jul2013	Aug2013	Sep2013	Oct2013	Nov2013	Dec2013	Jan2014
A&G Mac	24680	Widget	100	makil	0	0	0	0	0	0	0	0	2100	100	0	50	1550
A&G Mac	24681	Widget 2	150	makil	0	0	0	0	0	0	0	0	0	0	0	0	1050

## Blanket Qty Usage Report

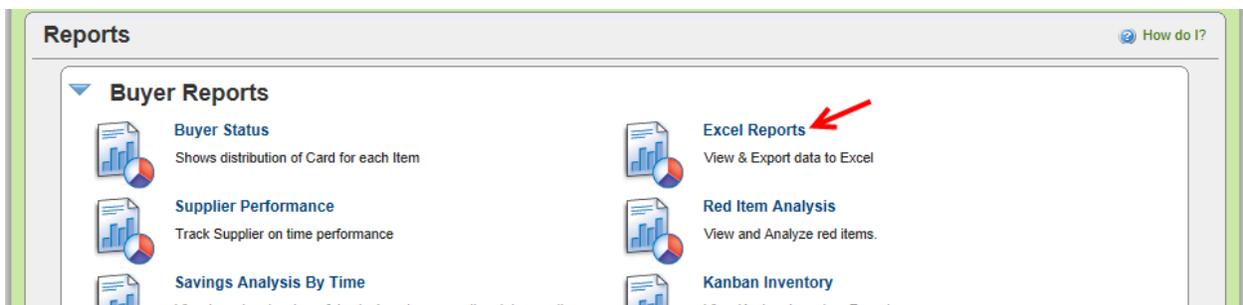


*Quick Tip – This report helps to track the “Blanket Quantity” on “Items” that the PO is set for a “Blanket Quantity”. This can be used in combination with an “Alert” for the “Blanket Quantity reaching a minimum level”. It is highly recommended that a Rule/Alert is set up for the blanket Quantity reaching a minimum size.*

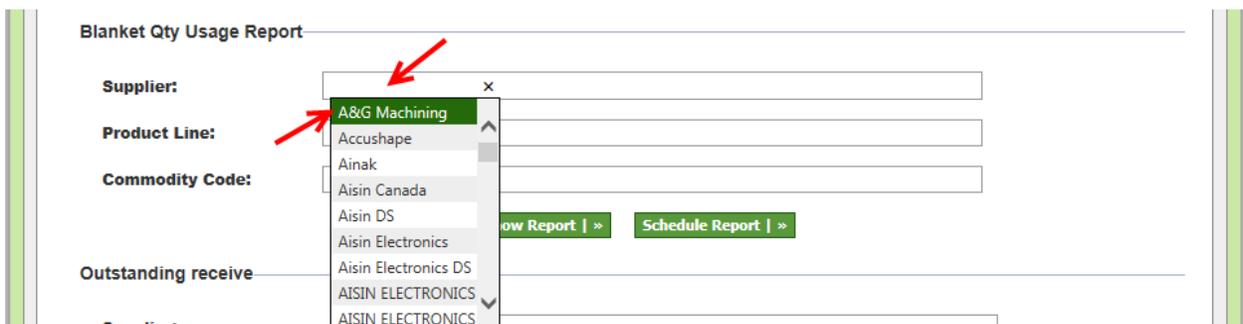
To navigate to the “Excel Reports”, click on “Reports”



Click on “Excel Reports”



Click in the “Supplier” field and press on the spacebar. A list of “Suppliers” appear  
Click on the “Supplier”



The “Supplier” appears. Click on the “Show Report” button.

Blanket Qty Usage Report

Supplier: A&G Machining X

Product Line:

Commodity Code:

Show Report | >>    Schedule Report | >>

If Applicable: Click on the “Open” button.

Do you want to open or save Blanket Qty Usage for Plant TBJ\_laZMcyCg.xml from demo.ultrivalms.com?

Open    Save    Cancel

The “Report” appears. The “Quantity” remaining on the “Blanket PO” appears under the “BlanketQty” column.

	A	B	C	D	E	F	G	H	I
1	ItemNo	Description	Family	Classification	SupplierName	SupplierPONum	SupplierPOLineNum	BlanketQty	
2	24680	Widget	Evolutions	Unknown	A&G Machining	123456	2000	350	
3									
4									

## Outstanding Receive Report

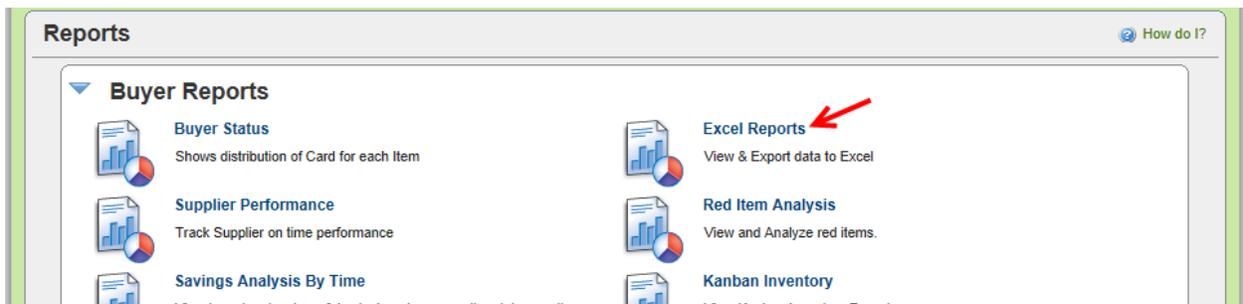


*Quick Tip – This report allows the “Receiving Dock” to get prepared for the “Next Days Receipts”. This data can be extracted by date.*

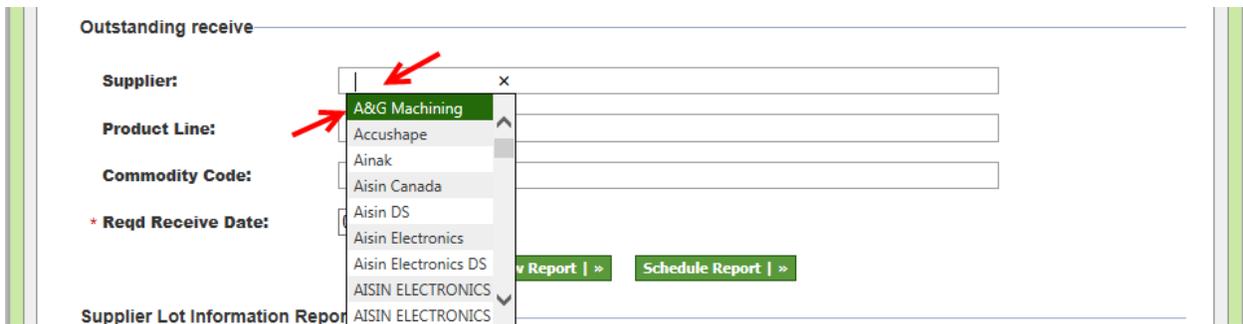
To navigate to the “Excel Reports”, click on “Reports”



Click on “Excel Reports”



Click in the “Supplier” field and press on the spacebar. A list of “Suppliers” appear  
Click on the “Supplier”



The **“Supplier”** appears. Click in the **“Reqd Receive Date:”** field and a **“Calendar”** will appear. Click on the **“Date”**

Outstanding receive

Supplier: A&G Machining X

Product Line:

Commodity Code:

\* Reqd Receive Date: 02/19/2014 x

Supplier Lot Information Repo

\* Date Range:

Supplier:

Item:

February 2014

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

Schedule Report | »

The **“Date”** appears. Click on the **“Show Report”** button.

Outstanding receive

Supplier: A&G Machining X

Product Line:

Commodity Code:

\* Reqd Receive Date: 02/19/2014

Show Report | »

Schedule Report | »

If Applicable: Click on the **“Open”** button.

Do you want to open or save OSReceiveExcel.xls (7.41 KB) from demo.ultrivalms.com?

Open Save Cancel x

Click on the **“Yes”** button.

Microsoft Office Excel



The file you are trying to open, 'OSReceiveExcel.xls', is in a different format than specified by the file extension. Verify that the file is not corrupted and is from a trusted source before opening the file. Do you want to open the file now?

Yes No Help

The **“Report”** appears. All **“Shipments”** to be **“Received”** on the selected date appear.

	A	B	C	D	E	F	G	H	I	J	K
1	Supplier Name	Item No	Description	Card ID	Ship Date	Ship Qty	Reqd Receive	PO #	PO Line #	Release #	Release Line #
2	A&G Machining	24680	Widget	KCD4MV7CNAG5	02/17/2014	50	02/18/2014	789654	0		
3	A&G Machining	24681	Widget 2	KCD4N3ECNAU9	02/17/2014	25	02/18/2014	789654	0		
4	A&G Machining	24681	Widget 2	KCD4N3GCNAYE	02/17/2014	25	02/18/2014	789654	0		
5											

## Supplier Lot Information Report

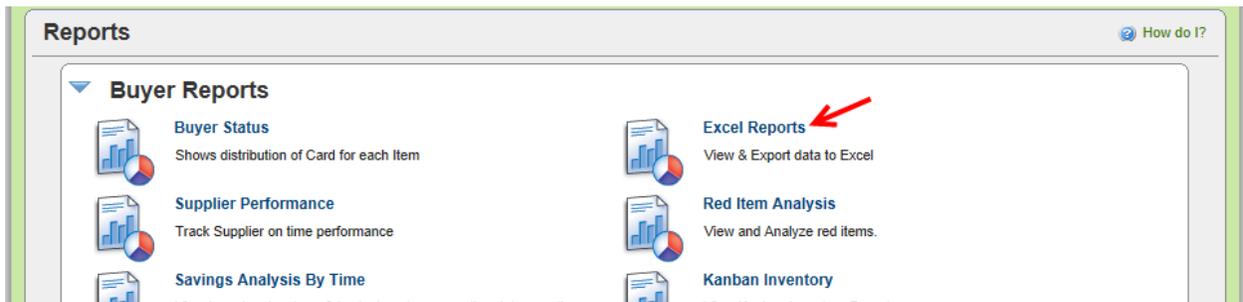


*Quick Tip – This is a general report to show the “Lot Tracking Information” from the “Suppliers” that are required to enter this data when shipping the product. Not all “Suppliers” will be required to enter this data.*

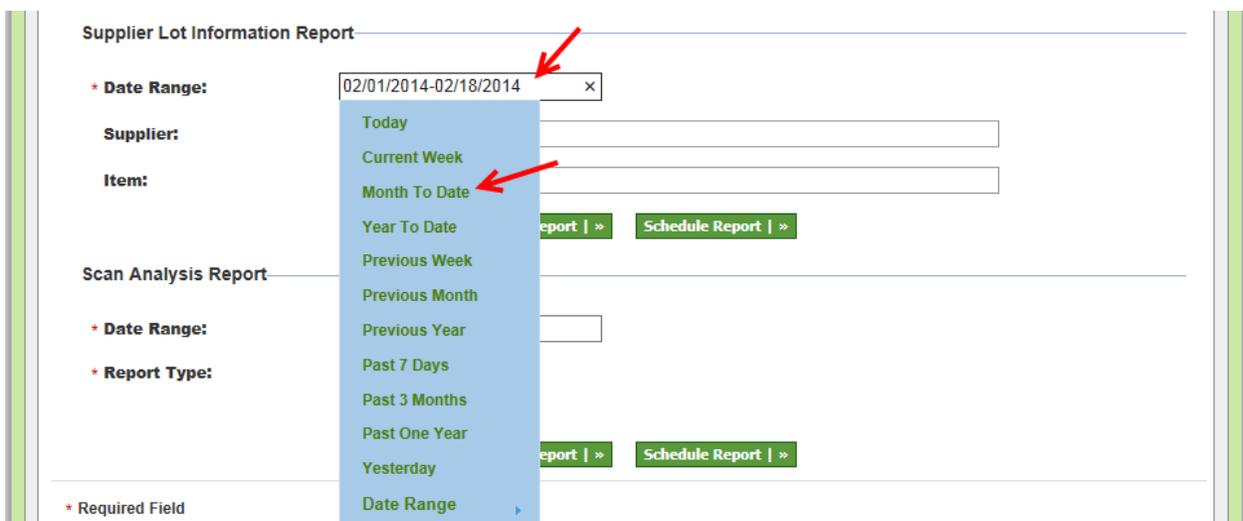
To navigate to the “Excel Reports”, click on “Reports”



Click on “Excel Reports”



Click in the “Date Range” field and press on the spacebar. A list of “Date Ranges” appear  
Click on a “Date Range”



Optional: **Click** in the “**Supplier**” field and **press** on the **spacebar**. A list of “**Suppliers**” appear **Click** on the “**Supplier**”

Supplier Lot Information Report

\* Date Range: 02/01/2014-02/18/2014

Supplier: [A&G Machining]

Item: [ ]

Scan Analysis Report

\* Date Range: [ ]

\* Report Type: [ ]

Show Report | » Schedule Report | »

The “**Supplier**” appears. Optional: **Enter** an “**Item Number**” In this example; we will not enter this data. **Click** on the “**Show Report**” button.

Supplier Lot Information Report

\* Date Range: 02/01/2014-02/18/2014

Supplier: A&G Machining x

Item: [ ]

Show Report | » Schedule Report | »

*If Applicable:* **Click** on the “**Open**” button.

Do you want to open or save LotInfoExcel.xls (1.29 KB) from demo.ultrivalms.com?

Open Save Cancel x

**Click** on the “**Yes**” button.

Microsoft Office Excel

The file you are trying to open, 'LotInfoExcel.xls', is in a different format than specified by the file extension. Verify that the file is not corrupted and is from a trusted source before opening the file. Do you want to open the file now?

Yes No Help

# The "Report" appears

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Item No	Descriptor	Supplier Name	Card ID	Cycle No	Card Qty	Lot No	Lot Qty	Release Date	Ship Date	Ship Qty	Receive Date	Receive Qty	Supplier PON	Order PON	Line	Tracking No
2	24680	Widget	A&G Machining	KCD4MV6CNA8	6	50	654789	50	02/14/2014	02/17/2014	50	-	0	789654	0	231564	
3	24680	Widget	A&G Machining	KCD4MV7CNA5	9	50	654789	50	02/13/2014	02/17/2014	50	-	0	789654	0	231564	
4	24680	Widget	A&G Machining	KCD4MV8CNAEP	5	50	654789	50	02/14/2014	02/17/2014	50	-	0	789654	0	231564	
5	24680	Widget	A&G Machining	KCD4MV9CNARJ	4	50	123456	50	02/03/2014	02/12/2014	50	02/14/2014	50	684568	1000	258852	
6	24680	Widget	A&G Machining	KCD4MVACNAN5	4	50	123456	50	02/03/2014	02/12/2014	50	02/14/2014	50	684568	1000	258852	
7	24680	Widget	A&G Machining	KCD4MVCCNAJA	5	50	123456	50	01/29/2014	02/12/2014	50	02/14/2014	50	684568	1000	258852	
8	24680	Widget	A&G Machining	KCD4MVDCAAPK	6	50	123456	50	01/28/2014	02/12/2014	50	02/14/2014	50	112233	1000	258852	
9	24680	Widget	A&G Machining	KCD4MVECNAGN	4	50	123456	50	01/28/2014	02/12/2014	50	02/14/2014	50	112233	1000	258852	
10	24680	Widget	A&G Machining	KCD4MVFCNAKU	4	50	123456	50	01/28/2014	02/12/2014	50	02/14/2014	50	112233	1000	258852	
11	24680	Widget	A&G Machining	KCD4MVGCAACZ	7	50	654789	50	02/14/2014	02/17/2014	50	-	0	789654	0	231564	
12	24680	Widget	A&G Machining	KCD4MVHCNAAB	6	50	123456	50	01/28/2014	02/12/2014	50	02/14/2014	50	112233	1000	258852	
13	24680	Widget	A&G Machining	KCD4MVJCNAAE4	4	50	123456	50	01/28/2014	02/12/2014	50	02/14/2014	50	112233	1000	258852	
14	24680	Widget	A&G Machining	KCD4MVKCNAR9	5	50	654789	50	02/14/2014	02/17/2014	50	-	0	789654	0	231564	
15	24680	Widget	A&G Machining	KCD4MVLCAALY	5	50	123456	50	01/29/2014	02/12/2014	50	02/14/2014	50	684568	1000	258852	
16	24680	Widget	A&G Machining	KCD4MVMCNABV	6	50	123456	50	01/29/2014	02/12/2014	50	02/14/2014	50	684568	1000	258852	
17	24680	Widget	A&G Machining	KCD4NG8CNAAB	1	50	357535	50	02/06/2014	02/14/2014	50	02/14/2014	50	467931	3000	628456	
18	24680	Widget	A&G Machining	KCD4NG9CNAME	1	50	357535	50	02/06/2014	02/14/2014	50	02/14/2014	50	467931	3000	628456	
19	24680	Widget	A&G Machining	KCD4NGACNAJZ	1	50	357535	50	02/06/2014	02/14/2014	50	02/14/2014	50	467931	3000	628456	
20	24680	Widget	A&G Machining	KCD4NGBCNAHK	1	50	357535	50	02/06/2014	02/14/2014	50	02/14/2014	50	467931	3000	628456	
21	24680	Widget	A&G Machining	KCD4NGCCNANN	1	50	357535	50	02/06/2014	02/14/2014	50	02/14/2014	50	467931	3000	628456	
22	24681	Widget 2	A&G Machining	KCD4N2TCNAJF	2	25	123456	25	02/03/2014	02/12/2014	25	02/14/2014	25	684568	1000	258852	
23	24681	Widget 2	A&G Machining	KCD4N2UCNADA	2	25	123456	25	02/03/2014	02/12/2014	25	02/14/2014	25	684568	1000	258852	
24	24681	Widget 2	A&G Machining	KCD4N2VCNAN8	3	25	123456	25	02/03/2014	02/12/2014	25	02/14/2014	25	684568	1000	258852	
25	24681	Widget 2	A&G Machining	KCD4N2WCNAH5	3	25	123456	25	02/03/2014	02/12/2014	25	02/14/2014	25	684568	1000	258852	

## Scan Analysis Report

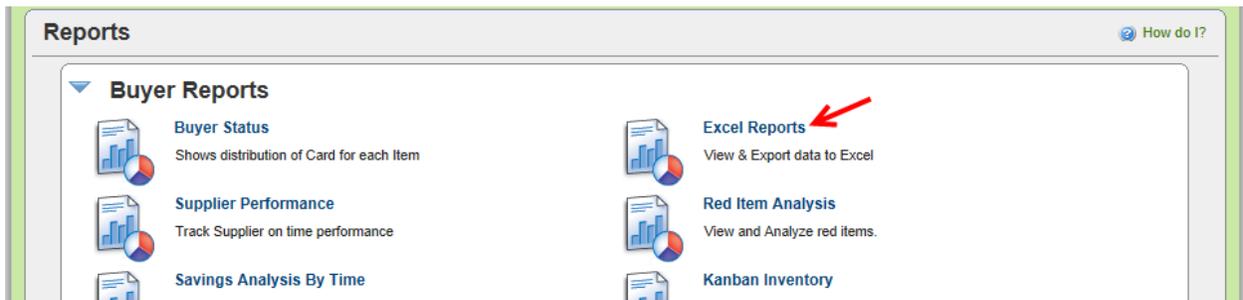


*Quick Tip – This is a “Generic” report showing the results when “Auditing Cards” using a scanner.*

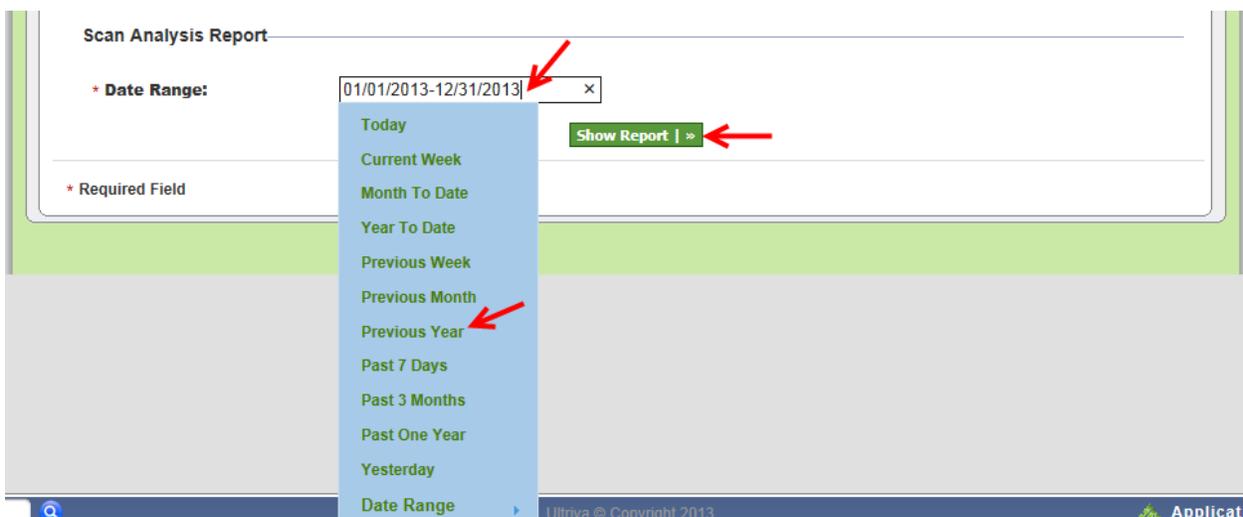
To navigate to the “Excel Reports”, click on “Reports”



Click on “Excel Reports”

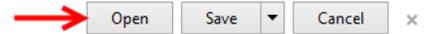


Click in the “Date Range” field and press on the spacebar. A list of “Date Ranges” appear. Click on a “Date Range”. Click on the “Show Report” button.



If Applicable: Click on the “Open” button.

Do you want to open or save Scan Analysis for Plant Demo Plant\_m6w6s3MG.xml from 65.17.235.115?



The “**Report**” appears

	A	B	C	D	E	F
1	BusName	TotalScan	SuccessScan	FailureScan	FromDate	ToDate
2	Demo Plant	60	44	16	1/1/2013 1:00:00 AM	1/1/2014 12:59:59 AM
3						
4						