



Ultriva 7.6 and Higher 'Item Attributes' Reference Guide

Table of Contents

(Click to follow link)

<i>Navigate to the Base Information Screen</i>	<i>2</i>
<i>Item Information</i>	<i>5</i>
<i>Coordinator Information</i>	<i>10</i>
<i>Usage Information</i>	<i>12</i>
<i>Group Information.....</i>	<i>14</i>
<i>Tolerance Information</i>	<i>15</i>
<i>Card Cycle Settings - Plant.....</i>	<i>16</i>
<i>Supplier Information.....</i>	<i>18</i>
<i>Lead Time Information</i>	<i>23</i>
<i>PO Information</i>	<i>24</i>
<i>Card Cycle Settings - Supplier.....</i>	<i>25</i>
<i>Additional/UOM Information</i>	<i>26</i>
<i>Adding Notes.....</i>	<i>27</i>
<i>Custom Fields</i>	<i>28</i>
<i>Adding an Additional Supplier to an Item (Dual Sourcing)</i>	<i>29</i>
<i>Create New Supplier – Supplier Information</i>	<i>31</i>
<i>Create New Supplier – Kanban/User Configuration.....</i>	<i>32</i>
<i>Supplier Address Information</i>	<i>33</i>
<i>Adding a Supplier User.....</i>	<i>34</i>
<i>Associate Supplier to an Item</i>	<i>36</i>
<i>Creating Cards.....</i>	<i>39</i>
<i>Adding Entities.....</i>	<i>43</i>
<i>Create Temp Card for Partial Shipment.....</i>	<i>46</i>
<i>Setting up a Rule</i>	<i>48</i>
<i>Security Policy Information</i>	<i>57</i>
<i>Apply to All (Auto Fill)</i>	<i>58</i>

Navigate to the Base Information Screen



Important – Prior to setting up an “Item” there are a couple of prerequisites such as having the “Supplier” and “Supplier Users” set up along with any “Entities” such as “Commodity Codes” and/or “Product Lines”. If integrated with your ERP system, run the “Item Sync” and the “Supplier Sync” to populate all of the data. If not integrated, follow the steps below.



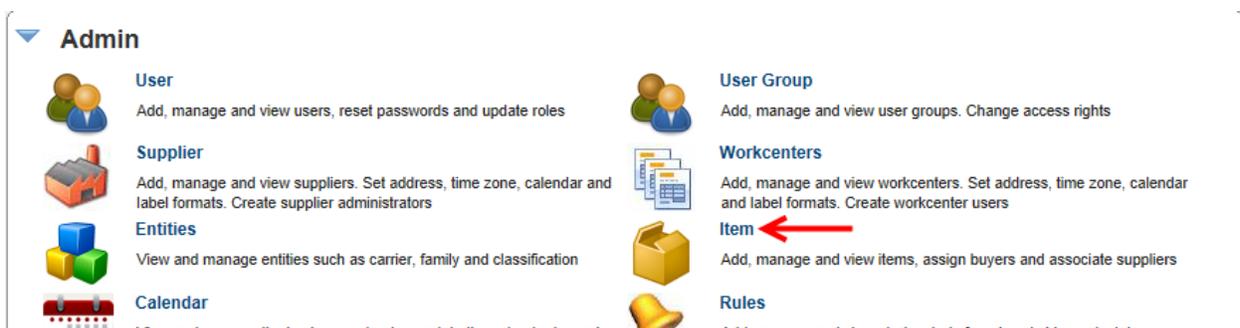
Quick Tip – For more detailed instructions on “Adding Entities”, click on the link below

[Adding Entities](#)

To navigate to the “Base Information” screen, click on “Admin”.



Click on “Item”



Click in the “Supplier” field and press the space bar. A drop down list of all “Suppliers” will appear. Select the “Supplier” and click on the “Go” button.



Quick Tip –Type in the first letter of the “Supplier Name” and the list will be generated with the suppliers names starting with the letter that has been entered.

The screenshot shows the 'Items List' interface. The 'Supplier' dropdown menu is open, showing a list of suppliers including A&G Machining, Accushape, Ainak, Aisin Canada, Aisin DS, Aisin Electronics, Aisin Electronics DS, and AISIN. A red arrow points to the 'Go' button in the top right corner of the interface.

Item	Description	Qty On Card	No. Of Cards	Default Supplier
5100R070B0	585100R070B0	1	0	Not Associated
7000000000	PLATE, MAT SET, UPR	100	0	Not Associated
3100R070B1	633100R070B1	16	0	Not Associated
3100R080B1	633100R080B1	16	0	Not Associated

The supplier parts appear. Click on the “Add” button.

The screenshot shows the 'Items List' interface with the 'Supplier' dropdown set to 'LJM Machining Supplies X'. The 'Add' button is highlighted with a red arrow. The table below shows items with 'LJM Machining Supplies' as the default supplier.

Category	Item	Description	Qty On Card	No. Of Cards	Default Supplier
Kanban	ULT-035-0354-00	BEARING-SLEEVE	12600	2	LJM Machining Supplies
Kanban	24689	Machine Part	400	6	LJM Machining Supplies
Kanban	ULT-035-0354-02	DU Bearing	14400	7	LJM Machining Supplies
Kanban	ULT-035-0355-00	Bearing	14400	11	LJM Machining Supplies
Kanban	ULT-035-0322-00	Bearing	600	12	LJM Machining Supplies
Kanban	24680	Widget	50	20	LJM Machining Supplies

Sorted by: No.Of Cards, Item, Qty On Card, Description
1 to 6 of 6



Important – A RED * (ASTERICK) means that information is required for that field.



Quick Tip –  Click on the question mark for an “Ultriva Tip” for that field

ULTRIVA DRIVING LEAN PERFORMANCE **Ultriva 7.5** Admin | My Account | Help | Logout

Home Material Status Actions Scan Reports Integration Laura Maki | TBJ

Admin > Item Favorites

New Item How do I?

Base Information Supplier Additional Information UOM Information Notes Custom Field List

Item Information

* Item No:  * Description:

Revision No: * Handling Time: (in days) 

Location Code:  **The location number or code where the item is stored in the plant where applicable.**

* Price Per UOM:  Kanban 

* Re-order cards when:  Lot Number Tracking: 

Coordinator Information

* Item:  Purchase: 

Quality: 

Usage Information

* Usage Per Day:  * Safety Time: (in days) 

Item Information



Important – The “Item Number” and “Description” should be the same as what has been entered into the “ERP” system.

Enter the “Item Number” and the “Description”

New Item How do I?

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

Item Information

* Item No:	25836	* Description:	Widget
Revision No:		* Handling Time:	0 (in days)
Location Code:		ABC Code:	
* Price Per UOM:	0	* Category:	Kanban
* Re-order cards when:	Open Box (First unit consumed)	Lot Number Tracking:	None



Quick Tip – By entering a “Revision No.” this data can then be printed out on the shipping label for reference.

Optional – Enter “Revision No”

New Item How do I?

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

Item Information

* Item No:	25836	* Description:	Widget
Revision No:	125	* Handling Time:	0 (in days)
Location Code:		ABC Code:	
* Price Per UOM:	0	* Category:	Kanban
* Re-order cards when:	Open Box (First unit consumed)	Lot Number Tracking:	None



Important – “Handling Time” will be entered in days. Include all time between “Receiving” the product to the “Point of Use” and “Releasing to the Supplier”. Time such as “Waiting to be Inspected”, the time “Sitting on the Dock” waiting for “Put Away” and any other process time that you may have, the time must all be added together.

Enter the “Handling Time”

The screenshot shows the 'New Item' form with the following fields and values:

Field	Value
* Item No:	25836
Revision No:	125
Location Code:	
* Price Per UOM:	0
* Re-order cards when:	Open Box (First unit consumed)
* Description:	Widget
* Handling Time:	5 (in days)
ABC Code:	
* Category:	Kanban
Lot Number Tracking:	None



Quick Tip – “Location Codes” are used mostly when there is a dedicated location for the parts from the supplier, within your facility. The “Location Code” can also be printed on the shipping label.

Optional – Enter the “Location Code” where your parts are stored within your facility.

The screenshot shows the 'New Item' form with the following fields and values:

Field	Value
* Item No:	25836
Revision No:	125
Location Code:	STK
* Price Per UOM:	0
* Re-order cards when:	Open Box (First unit consumed)
* Description:	Widget
* Handling Time:	5 (in days)
ABC Code:	
* Category:	Kanban
Lot Number Tracking:	None



Quick Tip – “ABC Code’s” can be based on price or inventory turns based on how your company looks at this data. (The higher the price or the higher the inventory turns are examples which may make this an A item). This information can be very beneficial when creating reports.

Optional – Enter an “ABC Code”

The screenshot shows the 'New Item' form with the following fields and values:

Field	Value
* Item No:	25836
Revision No:	125
Location Code:	STK
* Price Per UOM:	0
* Re-order cards when:	Open Box (First unit consumed)
* Description:	Widget
* Handling Time:	5 (in days)
ABC Code:	A
* Category:	Kanban
Lot Number Tracking:	None



Quick Tip – This could be piece part price, lbs., yards, etc.

Enter the “Price Per UOM” (Unit of Measure)

The screenshot shows the 'New Item' form with the following fields and values:

Field	Value
* Item No:	25836
Revision No:	125
Location Code:	STK
* Price Per UOM:	55.55
* Re-order cards when:	Open Box (First unit consumed)
* Description:	Widget
* Handling Time:	5 (in days)
ABC Code:	A
* Category:	Kanban
Lot Number Tracking:	None



Quick Tip – Ultriva supports 3 categories, “Kanban, Forecast and Virtual Kanban”.
Kanban – Based on actual consumption, scanning triggers the replenishment.
Forecast – Based on MRP ordering. Acts like a supplier portal and publishes the orders to the supplier.
Virtual Kanban – Instead of scanning, signals are based on your On Hand inventory in your ERP system.

Click on the drop down arrow and select the “Category”.

The screenshot shows the 'New Item' form with the 'Item Information' tab selected. The 'Category' dropdown menu is open, showing three options: 'Kanban', 'Forecast', and 'Virtual'. A red arrow points to the 'Kanban' option, which is highlighted in blue. Other fields include Item No: 25836, Revision No: 125, Location Code: STK, Price Per UOM: 55.55, Re-order cards when: Open Box (First unit consumed), Description: Widget, Handling Time: 5 (in days), ABC Code: A, and Lot Number Tracking: Virtual.



Quick Tip –
Open box (First unit consumed) is recommended for the “External/Supplier” module. When the parts are consumed they are released to the supplier. The scan occurs immediately.
Empty box (Last unit consumed) would be recommended for the “Internal” Module, where there may be internal space constraints. The signal occurs after the parts have been consumed.

Click on the drop down arrow to select “Re-order cards when:”

The screenshot shows the 'New Item' form with the 'Re-order cards when:' dropdown menu open. The menu shows two options: 'Open Box (First unit consumed)' and 'Empty Box (Last unit consumed)'. A red arrow points to the 'Open Box (First unit consumed)' option, which is highlighted in blue. Other fields include Item No: 25836, Revision No: 125, Location Code: STK, Price Per UOM: 55.55, Description: Widget, Handling Time: 5 (in days), ABC Code: A, Category: Kanban, and Lot Number Tracking: None.



Quick Tip – “Lot Number Tracking” has 3 options.

None – The default. No lot tracking number is required for this item.

Required at Ship – The lot tracking information will be required from the supplier at ship.

Required at Receive– The receiver would be required to enter the lot tracking information.

Optional – Click on the drop down arrow to select the “Lot Tracking Number” option.

New Item How do I?

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

Item Information

* Item No:	25836	* Description:	Widget
Revision No:	125	* Handling Time:	5 (in days)
Location Code:	STK	ABC Code:	A
* Price Per UOM:	55.55	* Category:	Kanban
* Re-order cards when:	Open Box (First unit consumed)	Lot Number Tracking:	None

Coordinator Information

The selections have been made for the “**Item Information**”. We will now move to the “**Coordinator Information**”.

New Item How do I?

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

Item Information

* Item No:	25836	* Description:	Widget
Revision No:	125	* Handling Time:	5 (in days)
Location Code:	STK	ABC Code:	A
* Price Per UOM:	55.55	* Category:	Kanban
* Re-order cards when:	Open Box (First unit consumed)	Lot Number Tracking:	None

Coordinator Information

* Item:		Purchase:	
Quality:			

Coordinator Information



Quick Tip – If you click in any “Coordinator” field and press on the space bar, a drop down box appears with a list of all users for this item and a selection can be made from that list. The first letter of the users ID can be entered also and the names with that letter will appear.

The “Item Coordinator” is usually the “Buyer” of the item being set up. The advantages to setting up the users are the alerts and emails that will be sent their way if there are issues with their parts.

Click in the field next to “Item:” **type the first letter** of the **user’s last name** and make your selection.

The screenshot shows the 'Coordinator Information' form. The 'Item' field has a dropdown menu open, displaying a list of user names: 'abarga', 'acadmin', 'agarcia', and 'aloki'. A red arrow points to the 'abarga' option. The 'Purchase' field is empty. The 'Quality' field is also empty. The 'Usage Information' section is partially visible below.



Important – When typing in your data a drop down box will appear. You must make your selection from the from the drop down as these are the selections set up in Ultriva. Once you make the selection you will see an “X” next to what you have select. If you do not see an “X” it has not been selected in Ultriva.

The screenshot shows the 'Coordinator Information' form after a selection. The 'Item' field now displays 'agarcia' with a small 'x' next to it, indicating it has been selected. A red arrow points to this 'x'. The 'Purchase' field is empty. The 'Quality' field is also empty.



Quick Tip –The “Purchase Coordinator” is usually the “Purchasing Analyst” of the item being set up. The advantages to setting up the users are the alerts and emails that will be sent their way if there are issues with their parts.

Click in the field next to “**Purchase:**” type the **first letter** of the **user’s last name** and make your selection.

Coordinator Information

* Item:	<input type="text" value="agarcia x"/>	<input <="" td="" type="button" value="?"/> <td>Purchase:</td> <td><input type="text" value="bdority x"/></td> <td><input <="" td="" type="button" value="?"/></td>	Purchase:	<input type="text" value="bdority x"/>	<input <="" td="" type="button" value="?"/>
Quality:	<input type="text"/>	<input <="" td="" type="button" value="?"/> <td></td> <td></td> <td></td>			



Quick Tip –The “Quality Coordinator” is usually the “Quality Receiving Coordinator” responsible for the quality of the items being received. The advantages to setting up the users are the alerts and emails that will be sent their way if there are issues with their parts.

Click in the field next to “**Quality:**” type the **first letter** of the **user’s last name** and make your selection.

Coordinator Information

* Item:	<input type="text" value="agarcia x"/>	<input <="" td="" type="button" value="?"/> <td>Purchase:</td> <td><input type="text" value="bdority x"/></td> <td><input <="" td="" type="button" value="?"/></td>	Purchase:	<input type="text" value="bdority x"/>	<input <="" td="" type="button" value="?"/>
Quality:	<input type="text" value="bwilson x"/>	<input <="" td="" type="button" value="?"/> <td></td> <td></td> <td></td>			

Usage Information



Quick Tip – The “Usage per Day”/ “Average Daily Demand” information is typically found in your “ERP”. The number should reflect on how much you are going to consume on an “Average Per Day”.



Tool Tip – Ultriva has a Module called the Inventory Optimization Tool. This Inventory Optimization Tool (IOT) takes your historical information – six months or one year or more – and points where and what to improve. You can assess supply chain, distribution and WIP independently depending on your inventory pain point. If you are a large corporation with multiple plants worldwide, you can do assessments for each plant to determine where to focus first. This is a great tool to help determine your loop sizes and savings when setting up new parts.

[Click here for the IOT link.](#)



Important – Your “Usage per Day” multiplied by your “Safety, Handling, Lead and Transit” times added together should never exceed your quantity on the card. If so, you will be carrying too much inventory and it may be difficult when trying to resize your loop size. Your “Usage per Day” is in “Days”.

Enter the “Usage per Day” (Average Daily Demand)

Usage Information	
* Usage Per Day:	<input type="text" value="100"/> ?
* Quantity On Card:	<input type="text" value="0"/> ?
* Safety Time:	<input type="text" value="0"/> (in days) ?



Quick Tip – The “Safety” time is in days. This time would cover how often product is received, the consumption patterns and any delays in the process.

Enter the “Safety Time”

Usage Information	
* Usage Per Day:	<input type="text" value="100"/> ?
* Quantity On Card:	<input type="text" value="0"/> ?
* Safety Time:	<input type="text" value="5"/> (in days) ?



Quick Tip – Your “Quantity on a Card” should be set to the standard container size, packaging and/or lot size.

Enter the “Quantity on Card”

Usage Information

* Usage Per Day: ⓘ
* Quantity On Card: ⓘ

* Safety Time: (in days) ⓘ

Group Information



Important – The “Product Line” and the “Commodity Code” must be set up in the “Admin/Entities” prior to having the option to select these classifications

Click on the **link below** for detailed instructions on “**Adding Entities**”



Quick Tip – Once these classifications are set up in Ultriva it is a key to further grouping of your parts when filtering. When you have a “Product Line” selected you can create your own “Red/Yellow/Green” rules.

Optional - Click on the drop down arrow to select a “**Product Line**” that this item may be tagged to. **Repeat the steps** to select a “**Commodity Code**”.

The screenshot shows a form with the following elements:

- Group Information** section with a dropdown menu open, listing various product lines. The '63 Frame 5G Motors' option is highlighted in blue.
- Product Line:** A dropdown menu currently set to 'None'.
- Commodity Code:** A dropdown menu currently set to 'None'.
- Tolerance Information** section with a dropdown menu.
- * Ship Quantity:** An input field.
- * Receive Qty:** An input field with the value '0'.

Tolerance Information



Quick Tip – There are 2 options for the “Tolerance Information”. “Ship and Receive”. If the supplier is shipping outside of the card quantity you will get an alert. If a number is placed into the “Ship and Receive” fields, it will subtract that number from the card quantity and that is the tolerance that will be set.

To “Force” the supplier to ship within the tolerance, you can select

Check this box to Force Tolerance for this item

This is checked when you want the supplier to ship within the quantity tolerance set up for the item. If the quantity would be outside of the shipping quantity tolerance, the supplier would not be able to ship the product.

Enter a number for the “**Ship**” and “**Receive**” tolerance. “**Click in the box to Force Tolerance for this Item**” if selecting this option.

Tolerance Information	
* Ship Quantity:	<input type="text" value="5"/>
* Receive Qty:	<input type="text" value="5"/>
Card Cycle Settings	
<input type="checkbox"/> Check this box for this item to Wait at dock for inspection	
<input type="checkbox"/> Check this box for this item to Wait for Put Away	
<input checked="" type="checkbox"/> Check this box to Force Tolerance for this item	
<input type="checkbox"/> Create Temporary Card for Partial Shipment.	
<input type="checkbox"/> Consignment Item	
<input type="checkbox"/> Do not include this item for Auto Resize	

Card Cycle Settings - Plant

Make the selections by clicking in the box by the selection and a checkmark will appear



Quick Tip – As each card for an item is being moved from one bucket to another, this is where a decision will be made on how you want the card to react. Example: When a card is “Shipped” you can configure it per the selections below.

Check this box for this item to Wait at dock for inspection

This is checked when the parts have to have a quality check prior to being placed On Hand. The parts have to wait at the dock until the inspection is completed and the cards moved accordingly. If the parts are accepted then they will be moved to On Hand. If the parts are rejected, they will be place back at the Supplier in the In Process bucket.

Check this box for this item to Wait for Put Away

This is checked when the parts do not have a dedicated location. The location will be tracked as they are Put Away.

Check this box to Force Tolerance for this item

This is checked when you want the supplier to ship within the quantity tolerance set up for the item. If the quantity would be outside of the shipping quantity tolerance, the supplier would not be able to ship the product.

Create Temporary Card for Partial Shipment.

This is checked when your supplier can not ship the total quantity that you ordered. It would create a temp card for the remaining balance. The temp card would be destroyed at consumption. The temp card is only created when you are outside of the tolerance you have set up for the item.

If you do not have this selection on your screen, Click below for detailed instructions to” **Turn on Temp Card for Partial Shipment**”.

[Turn on Temp Card for Partial Shipment](#)

Consignment Item

This is checked when your parts are on consignment. The behavior is such that the receipt happens at consumption (release of parts), not when you receive them.

Do not include this item for Auto Resize

This is checked if you want to exclude this part from auto resize. Some parts may have a 2 bin system already where there is no need to resize.



Important – If you see the message below, you have clicked on the “Save” button prior to setting up the supplier.

The screenshot shows the Ultriva 7.5 web application interface. At the top, there is a navigation bar with the Ultriva logo and the text 'Ultriva 7.5'. Below the navigation bar, there are tabs for 'Home', 'Material Status', 'Actions', 'Scan', 'Reports', and 'Integration'. The user's name 'Laura Maki' and a dropdown menu 'TBJ' are visible. The main content area is titled 'New Item' and contains a red error message box with a white 'X' icon and the text 'Required fields do not have valid values.' A red arrow points to the error message.

To continue, **Click** on the “Supplier” tab

The screenshot shows the 'Supplier' tab for a new item in the Ultriva 7.5 web application. The 'Supplier' tab is highlighted with a red arrow. The form is divided into several sections: 'Item Information', 'Coordinator Information', 'Usage Information', and 'Group Information'. Each section contains various input fields and dropdown menus. The 'Item Information' section includes fields for Item No (24680), Revision No (125), Location Code (STK), Price Per UOM (55.55), Re-order cards when (Open Box), Description (Widget), Handling Time (0.5), ABC Code (A), Category (Kanban), and Lot Number Tracking (Required At Ship). The 'Coordinator Information' section includes fields for Item (makil) and Purchase (bills). The 'Usage Information' section includes fields for Usage Per Day (100) and Safety Time (5). The 'Group Information' section includes a dropdown for Product Line (Evolutions) and a dropdown for Commodity Code (None).

Supplier Information



*Important – A RED *(ASTERICK) means that information is required for that field.*

Click in the “Supplier” field and type the first letter of the “Suppliers” name and make your selection.



Quick Tip – By clicking in the field and pressing the space bar and a drop down box appears with a list of all suppliers.

ULTRIVA DRIVING LEAN PERFORMANCE **Ultriva 7.5** Admin | My Account | Help | Logout

Home Material Status Actions Scan Reports Integration Laura Maki | TBJ

Supplier > C > F > Home > Item Favorites

Map Supplier to Item 24680 How do I?

Supplier Information

* Supplier:	<input type="text" value=""/>	* Supplier Item No.:	<input type="text" value="24680"/>
* Description:	<input type="text" value=""/>	* Min. Order Cards:	<input type="text" value="0"/>
* Default Carrier:	<input type="text" value=""/>	* Card Allocation:	<input type="text" value="100"/> (in %)
* Supplier User:	<input type="text" value=""/>		
Additional Contacts:	<input type="text" value=""/>		

Lead Time Information

* Lead Time:	<input type="text" value=""/>	(in days)	* Transit Time:	<input type="text" value="0"/>	(in days)
--------------	-------------------------------	-----------	-----------------	--------------------------------	-----------

PO Information

PO #:	<input type="text" value=""/>	PO Line #:	<input type="text" value="0"/>
PO Release#:	<input type="text" value=""/>	PO Release Line #:	<input type="text" value=""/>
* PO Type:	<input checked="" type="radio"/> Discrete <input type="radio"/> Blanket		
Blanket Qty:	<input type="text" value="0"/>	Blanket End Date:	<input type="text" value=""/>

Card Cycle Settings

Check this box if the Released cards needs to wait till Run Line is reached
 Check this box if the item goes through the Shipping Hub
 Check this box if the Released cards needs to wait till PO is created

* Required field Save | X | Cancel



Quick Tip – The “Supplier Item No” and the “Description” is automatically populated from the data that you have entered in the Item set up.

Click in the **box** next to “Min Order Cards” if you are if you have a minimum order qty from the supplier that is larger than your card quantity. **Example: You have a 100 pc minimum order quantity from your supplier and your card size is 25. You would set the Min Order Cards to 4. 4 cards x 25 pcs. per card = the minimum order of 100 pcs.**

Leave this number at zero if you are not using this feature.

Supplier Information			
* Supplier:	LJM Machining Supplies	* Supplier Item No.:	24680
* Description:	Widget	* Min. Order Cards:	0
* Default Carrier:	NON-ETD	* Card Allocation:	100 (in %)
* Supplier User:			
Additional Contacts:			



Important – If you choose to run the “Min Order Cards”, you must also place a checkmark in the box on the bottom part of the screen under “Card Cycle” settings. There is also a secondary function you can turn on if the “Released” cards should wait for the “Manual Approval” process. If that is turned on, the cards would need to be approved by someone at your plant prior to the supplier having the ability to accept them in Ultriva.

Card Cycle Settings
<input checked="" type="checkbox"/> Check this box if the Released cards needs to wait till Run Line is reached
<input type="checkbox"/> Check this box if the Released cards should wait for Manual Approval Process
<input type="checkbox"/> Check this box if the item goes through the Shipping Hub
<input type="checkbox"/> Check this box if the Released cards needs to wait till PO is created



Quick Tip – The “Carrier Information” must be set up in “Admin/Entities” first. Click on the link below for detailed instructions on “Adding Entities”.



Click on the **drop down arrow** next to “Default Carrier” to select the “Carrier”. (If applicable)

Supplier Information	
* Supplier:	LJM Machining Supplies
* Description:	Widget
* Default Carrier:	<div style="border: 1px solid black; padding: 2px;"> -- Select -- ETD NON-ETD </div>
* Supplier User:	
Additional Contacts:	
* Supplier Item No.:	24680
* Min. Order Cards:	2
* Card Allocation:	100 (in %)

This example we will be dual sourcing, meaning we will be using 2 suppliers for this 1 part.



Quick Tip – Example:

1 Supplier = 100%. If you dual source it may be 50%/50%, 60%/40% or whatever percent chosen for both suppliers. The cards will be released to the supplier according to the percent set here.

Enter the percent for your “Card Allocation”.

Supplier Information	
* Supplier:	LJM Machining Supplies
* Description:	Widget
* Default Carrier:	ETD <input type="button" value="v"/>
* Supplier Item No.:	24680
* Min. Order Cards:	2
* Card Allocation:	50 (in %)



Quick Tip – The “Supplier User” is usually the “Supplier Administrator” of the item being set up. The advantages to setting up the “Users” are the “Alerts and Emails” that will be sent their way if there are issues with their parts. “Late, Rescheduled and Short Shipments” are a few examples of alerts that would be sent.

Click in the field next to “Supplier User:” type the first letter of the “User ID” and make the selection

Supplier Information

* Supplier: LJM Machining Supplies * Supplier Item No.: 24680 ?

* Description: Widget * Min. Order Cards: 2 ?

* Default Carrier: ETD ? * Card Allocation: 100 (in %)

* Supplier User: ?

Additional Contacts: ?

Lead Time Information

* Lead Time: (in days) ? * Transit Time: 1 (in days) ?

PO Information

PO #: ? PO Line #: 1000 ?

PO Release#: PO Release Line #:

Note: A dropdown menu is open for the Supplier User field, showing a list of users: acadmin, amcbride, avaracallo (highlighted with a red arrow), bbiel, bdority, bills, cmehrhar, cynthial, dcbreedi.

Repeat the steps above to add “Additional Contacts”.

Supplier Information

* Supplier: LJM Machining Supplies * Supplier Item No.: 24680 ?

* Description: Widget * Min. Order Cards: 2 ?

* Default Carrier: ETD ? * Card Allocation: 50 (in %)

* Supplier User: cmehrhar x ?

Additional Contacts: ?

Lead Time Information

* Lead Time: (in days) ? * Transit Time: (in days) ?

PO Information

PO #: ? PO Line #: ?

PO Release#: PO Release Line #:

* PO Type:

Note: A dropdown menu is open for the Additional Contacts field, showing a list of users: acadmin (highlighted with a red arrow), amcbride, avaracallo, bbiel, bdority, cmehrhar, dcbreedi, dwhite, edavis.



Quick Tip – It is highly recommended to have more than one user set up in Ultriva. With employees on vacation or sick, you would always want a back-up

The “Additional Contacts” have been added

ULTRIVA
DRIVING LEAN PERFORMANCE

Ultriva 7.5

Admin | My Account | Help | Logout

Home Material Status Actions Scan Reports Integration

Laura Maki | TBJ

Item Favorites

New Item

How do I?

Base Information Supplier Additional Information UOM Information Notes Custom Field List

Supplier Information

* Supplier: Machining Supplies x ?

* Supplier Item No.: 24680 ?

* Description: Widget

* Min. Order Cards: 2 ?

* Default Carrier: ETD ?

* Card Allocation: 100 (in %)

* Supplier User: cmehrharr x ?

Additional Contacts: acadmin x gmanning x liza x ?

Lead Time Information



Quick Tip – The “Lead” Time is in Days. The time it takes the supplier to “Manufacture” and “Ship” the items.

Enter the “Lead Time”

Edit Item 24680 mapped to Supplier LJM Machi Last modified on [10/18/2013 05:03:05 PM] by [Laura Maki] [How do I?](#)

Supplier Information

* Supplier: LJM Machining Supplies * Supplier Item No.: 24680
* Description: Widget * Min. Order Cards: 2
* Default Carrier: ETD * Card Allocation: 50 (in %)
* Supplier User: cmehrhar x
Additional Contacts: acadmin x gmanning x lizs x

Lead Time Information

* Lead Time: 3 (in days) * Transit Time: 0 (in days)



Quick Tip – The “Transit” Time is in Days. The time it takes for the supplier’s product to reach the plant after it has shipped from their facility.

Enter the “Transit Time”

Edit Item 24680 mapped to Supplier LJM Machi Last modified on [10/18/2013 05:03:05 PM] by [Laura Maki] [How do I?](#)

Supplier Information

* Supplier: LJM Machining Supplies * Supplier Item No.: 24680
* Description: Widget * Min. Order Cards: 2
* Default Carrier: ETD * Card Allocation: 50 (in %)
* Supplier User: cmehrhar x
Additional Contacts: acadmin x gmanning x lizs x

Lead Time Information

* Lead Time: 3 (in days) * Transit Time: 1 (in days)

PO Information



Important – Ultriva supports “Discrete and Blanket PO’s”. If using “Discrete”, there is no need to input data as the integration will pick this up.



Quick Tip –There are 2 Optional features for using a “Blanket PO”. “Blanket PO Quantity” or “Blanket PO End Date”

Ultriva will track this accordingly. When using either selection, a rule can be created so the “Users” may get an alert when either selection is close to running out. If a quantity is entered below, each time a “PO” is sent, the quantity will be deducted on this screen. Return to this screen to view what is remaining on the “Blanket PO”.

To select a “Blanket End Date” just click in the “Blanket End Date” field and a calendar will appear which you can make your selection.

Select “Blanket” if you are choosing to use a “Blanket PO”. Enter the “Blanket PO #” and the “PO Release Line #”. Enter the “Quantity” on the “Blanket PO”.

The screenshot shows the 'PO Information' form with the following fields and annotations:

- PO #:** 456123 (Red arrow pointing to the field)
- PO Line #:** 1000 (Red arrow pointing to the field)
- PO Release#:** (Empty field)
- PO Release Line #:** (Empty field)
- * PO Type:** Discrete Blanket (Red arrow pointing to the Blanket radio button)
- Blanket Qty:** 1000 (Red circle around the field)
- Blanket End Date:** (Empty field, red circle around the field)

Card Cycle Settings

- Check this box if the Released cards needs to wait till Run Line is reached
- Check this box if the Released cards should wait for Manual Approval Process
- Check this box if the item goes through the Shipping Hub
- Check this box if the Released cards needs to wait till PO is created

* Required field

Save | » X | Cancel

Click on the link below if using the “Blanket Quantity” or the “Blanket End Date” and would like to create a rule for the selection.

[Setting up a Rule Instructions](#)

Card Cycle Settings - Supplier



Quick Tip – As each card for an item is being moved from one bucket to another, this is where you can make decisions on how you want the card to react.



Important – If you choose to run the “Min Order Cards”, you must also place a checkmark in the box on the bottom part of the screen under “Card Cycle” settings. There is also a secondary function you can turn on if the “Released” cards should wait for the “Manual Approval” process. If that is turned on, the cards would need to be approved by someone at your plant prior to the supplier having the ability to “Accept” them in Ultriva.

- Check this box if the Released cards needs to wait till Run Line is reached
- Check this box if the Released cards should wait for Manual Approval Process

Click in the **box** next to “**Min Order Cards**” if you are if you have a minimum order qty from the supplier that is larger than your card quantity. *Example: You have a 100 pc minimum order quantity from your supplier and your card size is 25. You would set the Min Order Cards to 4. 4 cards x 25 pcs. per card = the minimum order of 100 pcs.*

- Check this box if the item goes through the Shipping Hub

Place a checkmark in this box - if your “**Supplier**” has a “**Consolidator**” or “**Consolidated Place**” for their shipment. This is an additional step and your shipment would be placed in the “**Ship Hub**” bucket until it is released from there and placed “**In Transit**”.

- Check this box if the Released cards needs to wait till PO is created

Place a checkmark in this box – If using integration it would prevent your “**Supplier**” from “**Accepting the Card(s)**” until the “**PO**” is created and the data is back from the “**ERP**”.



Important – If not integrated, a manual process can be set up. Pay close attention that the manual steps to “Set the PO” are being completed.

Additional/UOM Information



Quick Tip – “Additional Information” and the “UOM Information” (Unit of Measure) tabs are basically for informational purposes. All data entered in these tabs can also be printed out on the shipping label.

Click on the “Additional Information” tab and enter the information. Click on the “Save” button

DRIVING LEAN PERFORMANCE

Home Material Status Actions Scan Reports Integration Laura Maki | TBJ

Rule Admin Item Favorites

Modify Item 24680

Last modified on [09/09/2013 10:50:27 AM] by [Laura Maki] How do I?

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

Additional Information

Container Type: * Shipping Weight:

* Required field

Save | X | Cancel

Click on the “UOM Information” (Unit of Measure) and enter the information. Click on the “Save” button

DRIVING LEAN PERFORMANCE

Home Material Status Actions Scan Reports Integration Laura Maki | TBJ

Rule Admin Item Favorites

Modify Item 24680

Last modified on [09/09/2013 10:50:27 AM] by [Laura Maki] How do I?

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

UOM Information

* Unit of Measure: * Unit Description:
* Package Quantity: Routing Label:
Drawing Number:

* Required field

Save | X | Cancel

Adding Notes



Quick Tip – “Internal Note’s” will not be added to the PO. They are informational notes for the employees working with the items.

Optional – Enter a “Internal Note”

DRIVING LEAN PERFORMANCE

Home Material Status Actions Scan Reports Integration Laura Maki | TBJ

Rule Admin Item Favorites

Modify Item 24680 Last modified on [09/09/2013 10:50:27 AM] by [Laura Maki] How do I?

Base Information Supplier Additional Information UOM Information Notes Custom Field List

Notes Information

Internal Notes: Must have a quality check

External Notes:

* Required field Save | X | Cancel



Quick Tip – “External Notes” are added to the “PO. Information” Hazardous material, quality certifications are a few examples of what can be placed here.

Optional – Enter a “External Note”

DRIVING LEAN PERFORMANCE

Home Material Status Actions Scan Reports Integration Laura Maki | TBJ

Rule Admin Item Favorites

Modify Item 24680 Last modified on [09/09/2013 10:50:27 AM] by [Laura Maki] How do I?

Base Information Supplier Additional Information UOM Information Notes Custom Field List

Notes Information

Internal Notes: Must have a quality check

External Notes: Hazardous Material

* Required field Save | X | Cancel

Custom Fields



Quick Tip – “Custom Fields” can be used a couple of different ways depending on the Customer. You can manage your sub inventory, the shelf life of a product, or entering specific information which may be needed for your ERP. You can add and maintained the information here. **If you would like to use this field, customization for this field must be completed by the “Ultriva Team”. Please contact your Ultriva Team Champion.**

New Item How do I?

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

IGParams

Name: _____ Value: _____

Sub Inventory:

Adhoc receipts for Item: Enabled Disabled

Order by lot size: Inherit

* Required field Save | >> X | Cancel

Once you Save the information the screen below appears and you can make decisions based on what your next steps would be. We will use Assign Additional Supplier. **Click** in the **circle** next to “Assign Additional Supplier”, **Click** on the “Next” button.

ULTRIVA **Ultriva 7.5** Admin | My Account | Help | Logout

Home Material Status Actions Scan Reports Integration Laura Maki | TBJ

Home > Item Favorites

Please select Next Steps below How do I?

Next Steps

Assign Additional Supplier

Setup Cards

Add Another Item

Back to Items List

* Required field Next | >> X | Cancel

Adding an Additional Supplier to an Item (Dual Sourcing)



Quick Tip –When you are “Dual Sourcing” you are adding a supplier to an existing item at another supplier. The card allocation will have to change for the existing supplier. Start by adding the new supplier first.

Click on “Admin”

Ultriva 7.5

Admin | My Account | Help | Logout

Home Material Status Actions Scan Reports Integration Laura Maki | TBJ

Buyer Home

Inventory Health

Alerts

You have no new alerts

72 Items Stock out risk (High)

284 Items Stock out risk (Medium)

2589 Items Stock out risk (Low)

Click on “Supplier”

Ultriva 7.5

Admin | My Account | Help | Logout

Home Material Status Actions Scan Reports Integration Laura Maki | TBJ

Item > Supplier > Admin

Admin

How do I?

Admin

- User**
Add, manage and view users, reset passwords and update roles
- Supplier** ←
Add, manage and view suppliers. Set address, time zone, calendar and label formats. Create supplier administrators
- Entities**
View and manage entities such as carrier, family and classification
- Calendar**
View and manage the business calendar, update the calendar to mark all dates that the business is closed
- Schedule Configuration**
Manage and view schedule configuration, define custom fields, order sort sequence and capacity
- User Group**
Add, manage and view user groups. Change access rights
- Workcenters**
Add, manage and view workcenters. Set address, time zone, calendar and label formats. Create workcenter users
- Item**
Add, manage and view items, assign buyers and associate suppliers
- Rules**
Add, manage and view alerts, alerts for missed shipments, late receipts, order acknowledgements and stock outs
- Shift**
Add, manage and view shifts, define shift capacity and normal break duration

Click on the “Add” button.

The screenshot displays the Ultriva 7.5 web application interface. At the top left is the Ultriva logo with the tagline "DRIVING LEADY PERFORMANCE". The title "Ultriva 7.5" is centered at the top. On the top right, there are links for "Admin | My Account | Help | Logout" and the user name "Laura Maki | TBJ". A navigation menu below the header includes "Home", "Material Status", "Actions", "Scan", "Reports", and "Integration". The breadcrumb trail shows "Item > Admin > Supplier". On the right side of the breadcrumb area, there are icons for "Print", "Export", and "Favorites". The main content area is titled "External Supplier List for TBJ" and includes a "Filters" section with "Filter By", "Select Operator", and "Enter Value" fields, along with "Go" and "Go" buttons. Below this is a "Find Name" search box with a red arrow pointing to it. At the bottom of the search area are buttons for "Add", "Edit", "View", and "More Options". At the very bottom of the interface, there are two tabs: "External Supplier" (which is active) and "Internal Supplier".

Create New Supplier – Supplier Information

Enter the “Name”, “Location”, the “Supplier Code from your ERP”, the “Supplier Timezone”. The weekly holiday is set to have Sat. and Sundays as weekly holidays. See the “checkmarks”. Changes can be made here by removing the checkmark by Sat. or Sun. By removing the checkmark, it will turn that day into a work day.

Click on the drop down arrow to select the “Label” format. *This will be the label that is set to print out at your supplier.*



Important – A RED *(ASTERICK) means that information is required for that field.

Ultriva 7.5 Admin | My Account | Help | Logout
Home Material Status Actions Scan Reports Integration Laura Maki | TBJ

Admin > Supplier Favorites

Create New Supplier

Supplier Information

* Name: A&G Machining * Location: Wisconsin

* Code: 147258 * Label Format: Ebiz2X4

* Timezone: (GMT-06:00) Central Time (US & Canada)

Weekly Holiday: Sun Mon Tue Wed Thu Fri Sat

Kanban Configuration

Auto Accept: OFF

Auto Receive: OFF

Supplier uses Shipment module: ON

Adjust Calculated ReqShipDate to EOD: OFF

User Configuration

Grant yourself as supplier administrator: OFF

Address Information

* Address 1: Address 2:

Address 3: * City:

State/Province: Zip/Postal Code:

* Country: USA

* Required field

Save | X | Cancel

Create New Supplier – Kanban/User Configuration



Quick Tip – Click on the question mark for an “Ultriva Tip” for that entry.

Auto Accept – If this is **turned on**, all orders will be **auto accepted** at the supplier and **bypassing the manual accepting** of cards.

Kanban Configuration

Auto Accept: OFF **If on, then orders for this supplier will be auto-accepted by the system**

Supplier uses Shipment module: ON Adjust Calculated ReqShipDate to EOD: OFF

Auto Receive – If this is **turned on**, all items will be “**Auto Received** to “**On-Hand**” by the system **after shipment of the items**. *If the item has to wait at the dock for inspection then it will go from **In Process at the Supplier** to **Received at Dock**.*

Kanban Configuration

Auto Accept: OFF Auto Receive: OFF **Items will be auto received to on hand by the system after shipment. If item has wait at dock enabled then it will wait for inspection**

Supplier uses Shipment module: ON Adjust Calculated ReqShipDate to EOD: OFF

Supplier uses Shipment Module – If this is **turned on** the “**Supplier**” has to **log in to Ultriva** to **ship the items** and **print the labels**.

Kanban Configuration

Auto Accept: OFF Auto Receive: OFF

Supplier uses Shipment module: ON **If on, the supplier has to come to portal site to do ship goods and print labels** Adjust Calculated ReqShipDate to EOD: OFF

User Configuration

Adjust Calculated ReqShipDate to EOD (End of Day) – If this is **turned on**, the “**Required Ship Date**” will be **rounded up** to the **end of the day**.

Kanban Configuration

Auto Accept: OFF Auto Receive: OFF

Supplier uses Shipment module: ON Adjust Calculated ReqShipDate to EOD: OFF **Required ship date for the orders will be round up to the end of the day.**

User Configuration

User Configuration – If this is **turned on**, you will be a “**Supplier Administrator**” and can then **help the supplier** if issues arise.

User Configuration

Grant yourself as supplier administrator: ON **Grant yourself administrator access to this supplier.**

Supplier Address Information

Enter the “Address Information” and click on the “Save” button.

ULTRIVA DRIVING LEAD PERFORMANCE
Ultriva 7.5 Admin | My Account | Help | Logout
Home Material Status Actions Scan Reports Integration Laura Maki | TBJ

Buyer Queue > Admin > Supplier Favorites

Create New Supplier

Supplier Information

* Name: A&G Machining * Location: Wisconsin
* Code: 147258 * Label Format: Ebix2X4
* Timezone: (GMT-12:00) International Date Line West
Weekly Holiday: Sun Mon Tue Wed Thu Fri Sat

Kanban Configuration

Auto Accept: OFF Auto Receive: OFF
Supplier uses Shipment module: ON Adjust Calculated ReqShipDate to EOD: OFF

User Configuration

Grant yourself as supplier administrator: ON

Address Information

* Address 1: 2525 Packer Drive Address 2:
Address 3: City: Green Bay
State/Province: WI Zip/Postal Code: 123456
* Country: USA

* Required field **Save** | **X** | **Cancel**

Click on the “Next” button to “Add Supplier Users”.

Please select Next Steps below How do I?

Next Steps

Add Supplier User
 Setup Shipping Rules
 Setup Business Calendar
 Add Another Supplier
 Back to List

* Required field **Next** | **X** | **Cancel**

Adding a Supplier User

Personal Information – Enter all of the user’s “Personal Information”. Click on the drop down arrows and Select the “Locale” (language) and the “Time Zone” where the user is located.

Create User for A&G Machining How do I?

Personal Information

* First Name: MI: * Last Name:

* Work Phone: Mobile Phone:

* Email ID: Locale:

* Time zone:

Account Information

* User ID:

* Account Type: Business unit:

Buyer Code:

Locale dropdown options: Not Set, Chinese (PRC), English (United States), English (United Kingdom), English (India), France (France), German (Germany), Spanish (Mexico), Japanese (Japan), Portuguese (Brazil)

Account Information – Create a “User ID”, Click on the drop down arrow to select an “Account Type” and enter the “Code” for the “Buyer” of the items.



Quick Tip – When selecting the “Account Type”, select the role for which the user is responsible for as the level of privileges changes with each role. Example: “Supplier Administrator” has the most privileges while the “Supplier Shipper” has less but enough to complete his/her job responsibilities.

Account Information

* User ID: Business unit:

* Account Type: Buyer Code:

Password Information

Password must be greater than 8 characters and contain at least 1 character(s).
Every 90 days your Password must change.

* Password: * Confirm Password:

Account Type dropdown options: --Select Account Type--, EHMD Supplier Admin, InterPlant Supplier, Master Label, RFQ Supplier User, Shipper - Hi Temp, Supplier Administrator, Supplier CSR, Supplier Shipper, Supplier User, Supplier View Only

Password Information – Enter a “Password” for the user and then “Confirm the Password”. Make a selection on the password. Select “User must change password at next log in” or “Password never expires”? To select one, click in the box next to the selection and a checkmark will appear. Click on the “Save” button.

Password Information

Password must be greater than 6 character(s).
 Password must contain at least 1 number and at least 1 character(s).
 Every 90 days your Password will expire.

* Password: ← → Confirm Password:

User must change password at next logon
 Password never expires

Application Access Information

○ - Not Set ● - Set Allow ● - Set Deny ✓ - Allowed ✗ - Denied

Application Name	Current Access	Allow	Deny
Supplier	✓	●	○

* Required field

Save | **X Cancel**

The “User” has been added.

User List for A&G Maching Filters Views How do I?

User smitha added Successfully

Filter By Select Operator Enter Value

00.0% Enabled

User ID	First Name	Last Name	Email ID	Work Phone	Buyer Code	Last Login On
smitha	Abbie	Smith	abbie.smith@agmach.com	1-609-609-6099	252525	09/12/2013

Sorted by: User ID 1 to 1 of 1



Quick Tip – It is highly recommended to have more than one user set up in Ultriva. With employees on vacation or sick, you would always want a back-up.

To “Add” another user, click on the “Add” button and repeat all steps.

100.0%

User ID	First Name	Last Name	Email ID	Work Phone	Buyer Code	Last Login On
smitha	Abbie	Smith	abbie.smith@agmach.com	1-609-609-6099	252525	09/12/2013

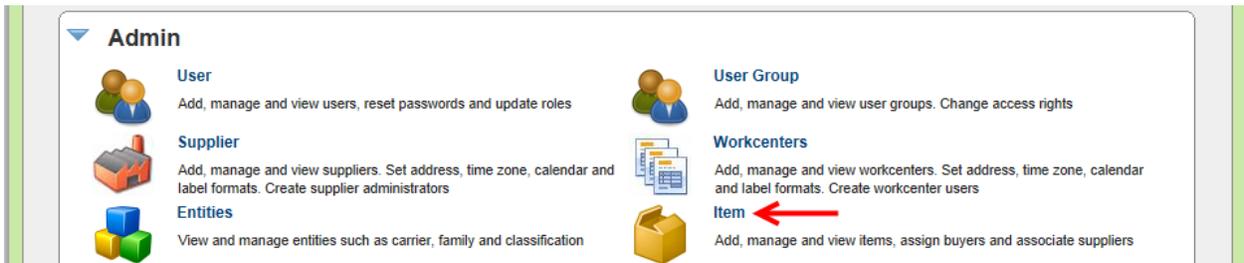
Sorted by: User ID 1 to 1 of 1

Associate Supplier to an Item

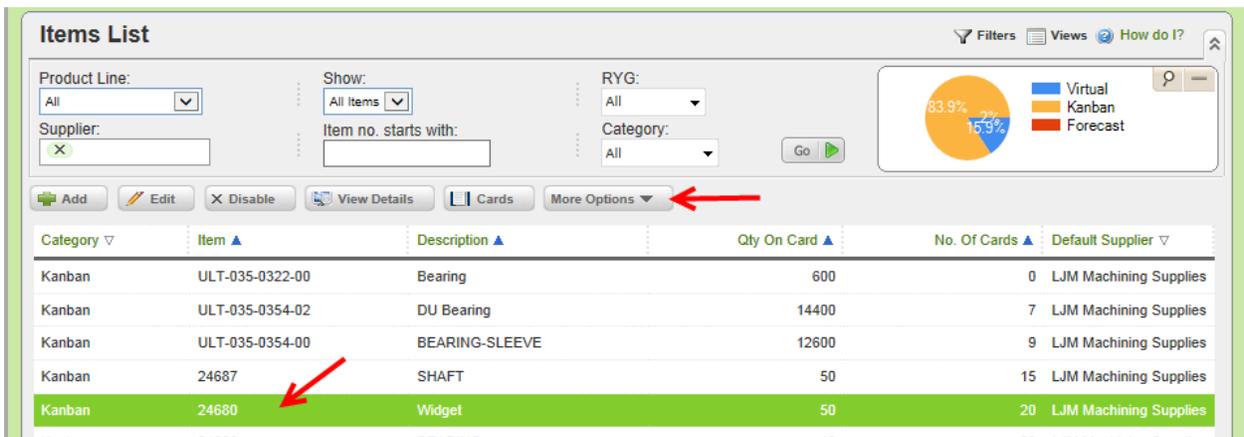
To navigate to the “Associate Supplier” screen, click on “Admin”.



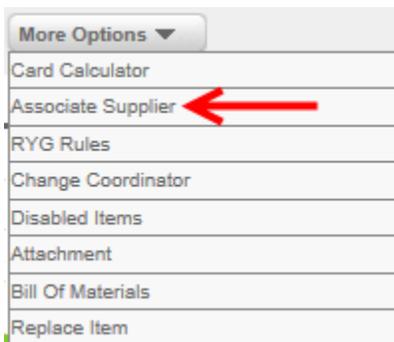
Click on “Item”



Click on the “Item” to highlight the line. Click on the drop down arrow by “More Options”



Select “Associate Supplier”.





Quick Tip – The supplier that you currently use for this part is listed below. Add the new (second supplier) for dual sourcing.

Click on the “Add” button

Items List

Product Line: All | Show: All Items | RYG: All | Category: All

Supplier: | Item no. starts with: | Go

83.9% Virtual | 15.3% Kanban | Forecast

Add | Edit | Disable | View Details | Cards | More Options

Category	Item	Description	Qty On Card	No. Of Cards	Default Supplier
Kanban	24680	Widget	50	21	LJM Machining Supplies
Virtual	ULT-546-5079-69	STATOR & PROTECTOR ASSM	105		EBLT Ind

Enter the first letter of the “Supplier” name and a drop down list appears. Select the “Supplier”. Enter the “remaining information”..

Map Supplier to Item 24680

Supplier Information

* Supplier: a& | A&G Machining

* Description: Widget

* Default Carrier: -- Select --

* Supplier User:

Additional Contacts:

* Supplier Item No.: 24680

* Min. Order Cards: 0

* Card Allocation: 100 (in %)

For detailed instructions on setting up the “Supplier” Click on the link below

[Supplier Set-Up Instructions](#)



Important – When “Dual Sourcing” it is important that both “Suppliers Card Allocations” when added together equal 100%. The default card allocation is 100% for single sourcing. Sample below.

Mapped Suppliers for Item 24680 Filters Views How do I?

Item 24680 to Supplier map modified successfully

Filter By Select Operator Enter Value

Find Supplier Item No.

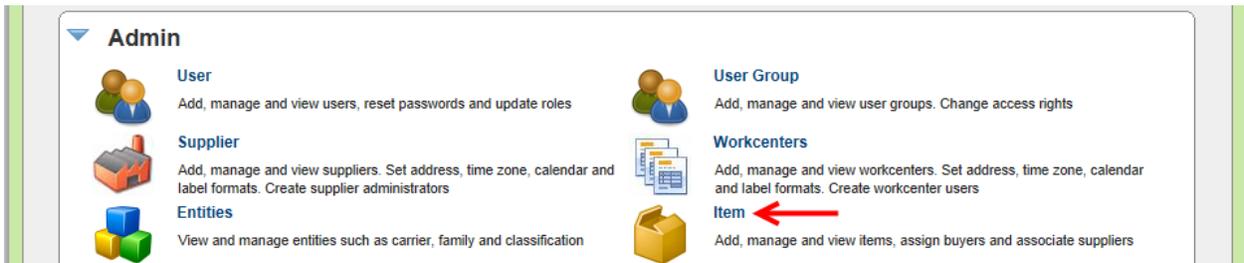
Supplier Name	Supplier Item No.	Supplier Item Desc	Carrier	Lead Time (in days)	Transit Time (in days)	Card Allocation %	Wait for PO?	Wait at Runline?	Wait at Ship Hub?
LJM Machining Supplies	24680	Widget	Unknown	3	1	50			
A&G Machining	24680	Widget	Unknown	3	1	50			

Creating Cards

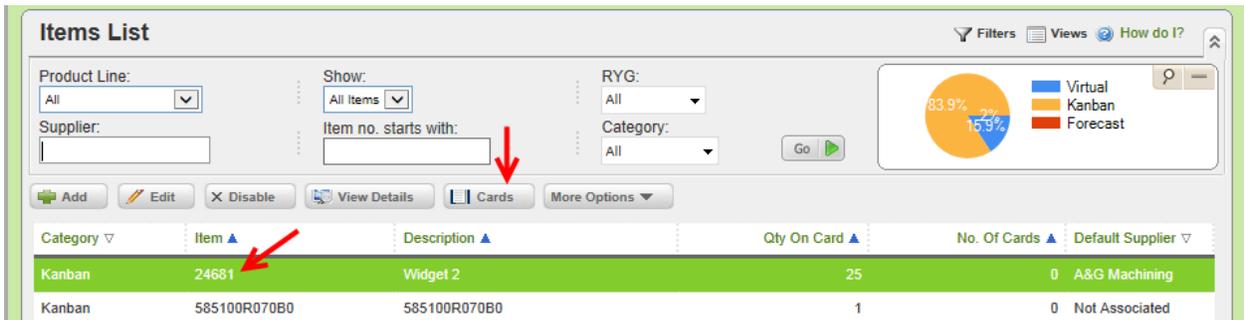
To navigate to the “Creating Cards” screen, Click on “Admin”.



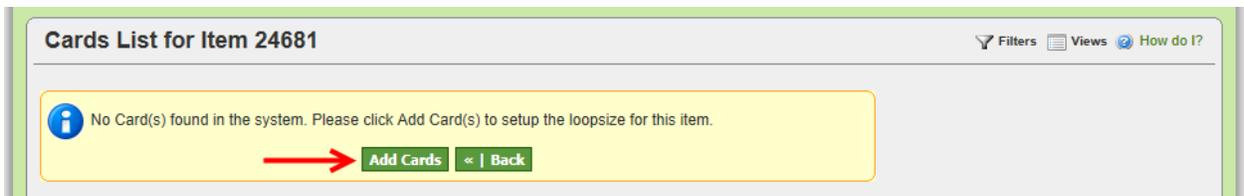
Click on “Item”



Click on the “Item” to highlight the line. Click on the “Cards” button



Click on “Add” cards



Enter the “Units On Hand” and “Units On Order”. Click on the “Next” button

Adjust Loopsize for Item: 24681 How do I?

Input Parameters Adjust Loopsize On Order Details

Initial Setup

Please enter your current inventory on hand and on order data to setup the Initial Loopsize for the Item:

* Units On Hand:

* Units On Order:

Next | **X | Cancel**



Quick Tip – Based on the information that has been placed into the “Item” and/or “Supplier” set up, here are the calculated recommendations for you from Ultriva.

Click on the “Next” button.

Adjust Loopsize for Item: 24681 How do I?

Input Parameters Adjust Loopsize On Order Details

Configure Loopsize Parameters

Initial Setup:

	Units	Equivalent Kanban Cards
Units On Hand	50	2
Units On Order	25	1
Total	75	3

Kanban Formula:

Usage per Day * (Handling Time + Lead Time + Transit Time + Safety Time)

Quantity on Card

Recommendation:

Based on the above formula, the following adjustments will be made:

- 2 Card(s) will be created to represent your On Hand Inventory
- 1 Card(s) will be released to represent your On Order Inventory
- 42 additional Card(s) will be created and released to match the Loopsize
- Loopsize will be adjusted to 45 Card(s).

Kanban Calculator:

	Current
Quantity On Card	25.00
Handling Time (in days)	0.50
Lead Time (in days) ?	3.00
Transit Time (in days) ?	1.00
Usage Per Day	150.00
Safety Stock (in days)	3.00
No of Cards	45

* Required field

Next | **X | Cancel**

If you are not satisfied with the “Recommendation” you can change your input. Click on the Prev button



Tool Tip – The **Apply to All** icon  is located on all “Action” screens where repeated data is entered. Data such as “Locations”, “PO’s”, new “Ship Dates” and such are a few of the processes where this tool comes in real handy.

Enter all information needed for the “Released” cards and Click on the “Apply to All” icon.

New Orders to match the Loopsize

Please leave blank for order details for integration to create orders in ERP.

Supplier: A&G Machining | PO #: 123567 | PO Line #: 1000 | Release #: | Release Line #: | Required Receive Date: 01/07/2014 | Unit Price: | Revision No: |  Apply To All

Supplier	Units On Card	Order Quantity	PO #	PO Line #	Release #	Release Line #	Required Receive Date	Unit Price	Revision No
A&G Machining	25	25							
A&G Machining	25	25							
A&G Machining	25	25							
A&G Machining	25	25							
A&G Machining	25	25							
A&G Machining	25	25							

The repeated data has now been “Auto Filled” Click on the “Finish” button

New Orders to match the Loopsize

Please leave blank for order details for integration to create orders in ERP.

Supplier: A&G Machining | PO #: 123567 | PO Line #: 1000 | Release #: | Release Line #: | Required Receive Date: 01/07/2014 | Unit Price: | Revision No: |  Apply To All

Supplier	Units On Card	Order Quantity	PO #	PO Line #	Release #	Release Line #	Required Receive Date	Unit Price	Revision No
A&G Machining	25	25	123567	1000			01/07/2014		
A&G Machining	25	25	123567	1000			01/07/2014		
A&G Machining	25	25	123567	1000			01/07/2014		
A&G Machining	25	25	123567	1000			01/07/2014		
A&G Machining	25	25	123567	1000			01/07/2014		
A&G Machining	25	25	123567	1000			01/07/2014		
Total	1050	1050							

* Required field

« | Prev **Finish** | » X | Cancel

“Loopsize adjusted successfully”. The **Cards** to be **“Released”** were **“Released”** to the **“Supplier”** and the **Cards** that are **“On-Hand”** were placed **“On-Hand”** in Ultriva

<input type="checkbox"/>	Card ID ▲	Card State ▼	Cycle No ▼	Qty On Card ▼	Card Qty ▼	Last Action Time ▼	Create Time ▼	Cycles Remaining ▼	Location Code ▼
<input checked="" type="checkbox"/>	KCD4N2TCNAJF	On Hand	0	25	25	12/29/2013 02:08:32 PM	12/29/2013	Infinite	STK
<input type="checkbox"/>	KCD4N2UCNADA	On Hand	0	25	25	12/29/2013 02:08:32 PM	12/29/2013	Infinite	STK
<input type="checkbox"/>	KCD4N2VCNAN8	Released	1	25	25	12/29/2013 02:08:33 PM	12/29/2013	Infinite	STK
<input type="checkbox"/>	KCD4N2WCNAH5	Released	1	25	25	12/29/2013 02:08:33 PM	12/29/2013	Infinite	STK
<input type="checkbox"/>	KCD4N2XCNAFP	Released	1	25	25	12/29/2013 02:08:33 PM	12/29/2013	Infinite	STK
<input type="checkbox"/>	KCD4N2YCNAQJ	Released	1	25	25	12/29/2013 02:08:33 PM	12/29/2013	Infinite	STK
<input type="checkbox"/>	KCD4N2ZCNABY	Released	1	25	25	12/29/2013 02:08:34 PM	12/29/2013	Infinite	STK
<input type="checkbox"/>	KCD4N3CNAV4	Released	1	25	25	12/29/2013 02:08:34 PM	12/29/2013	Infinite	STK
<input type="checkbox"/>	KCD4N33CNA29	Released	1	25	25	12/29/2013 02:08:34 PM	12/29/2013	Infinite	STK
<input type="checkbox"/>	KCD4N34CNA7Y	Released	1	25	25	12/29/2013 02:08:34 PM	12/29/2013	Infinite	STK

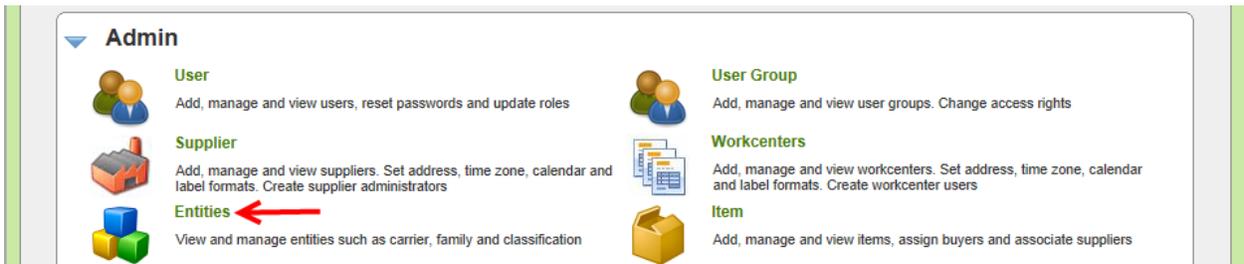
Sorted by: Card ID 1 to 10 of 45

Adding Entities

To navigate to the “Entities” screen, click on “Admin”.

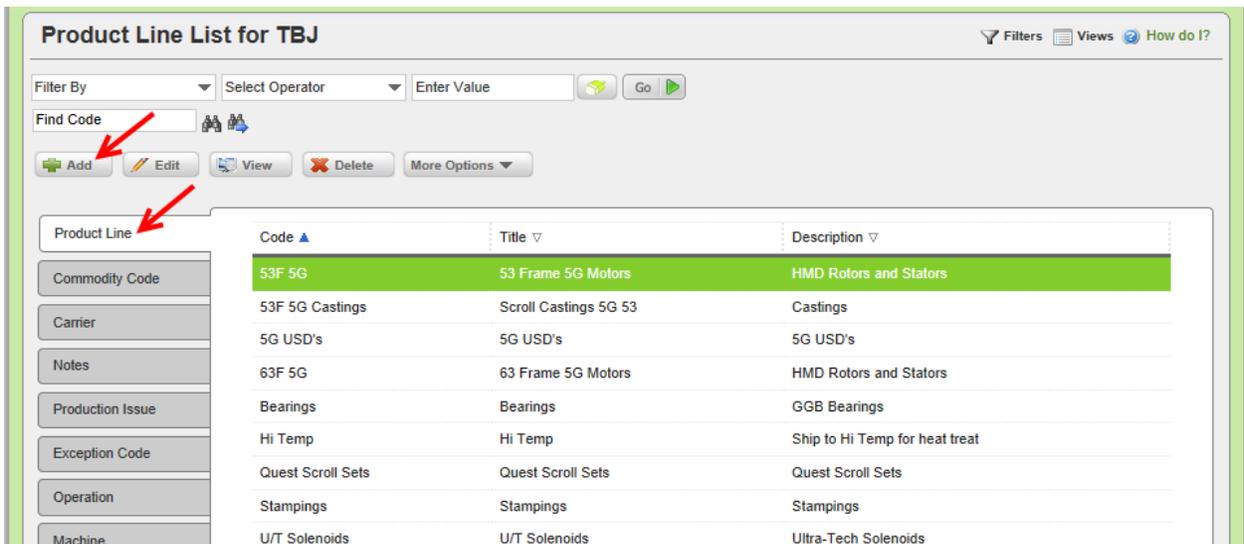


Click on “Entities”



The list of “Entities” are in the column on the left starting with “Product Line”. Click on the “Entity” tab of your choice and Click on the “Add” button.

The example we has chosen is “Product Line”





*Important – A RED * (ASTERICK) means that information is required for that field.*

Type in the **information** and **click** on the “Save” button

Create New Product Line How do I?

Product Line Information

* Code: VS8 * Title: Evolutions

* Description: Finished Goods

* Required field

Save | X | Cancel



Quick Tip – By “Associating” your items here you can select all items that will be tied to the “New Product Line” in this example.

“Next Steps” screen appears. With “Associate Items” selected, **Click** on the “Next” button

Please select Next Steps below How do I?

Next Steps

Associate Items

Add Another Product Line

Back to List

* Required field

Next | X | Cancel

Click in the box next to the **item number** and a **checkmark** will appear. **Click** on the “Assign” button



Important – You may have many pages of item numbers so if you do not see your item number here; it may be on another page.

Item	Description	Qty On Card	Product Line	Commodity Code
<input type="checkbox"/> 24680	Widget	50	Evolutions	Unknown
<input checked="" type="checkbox"/> 24681	Widget 2	25	Unknown	Unknown
<input type="checkbox"/> 24687	SHAFT	50	63 Frame 5G Motors	Unknown
<input checked="" type="checkbox"/> 24688	BEARING	10	Bearings	Unknown

Your items have now been **assigned** to the selected “Product Line”

The selected Item(s) are assigned successfully

Item	Description	Qty On Card	Product Line	Commodity Code
24681	Widget 2	25	Evolutions	Unknown
24688	BEARING	10	Evolutions	Unknown

Click on a link below to return to your **previous page**

[Return to the Base Information Getting](#)

[Return to the Group Information screen](#)

[Return to the Supplier Carrier Information](#)

Create Temp Card for Partial Shipment

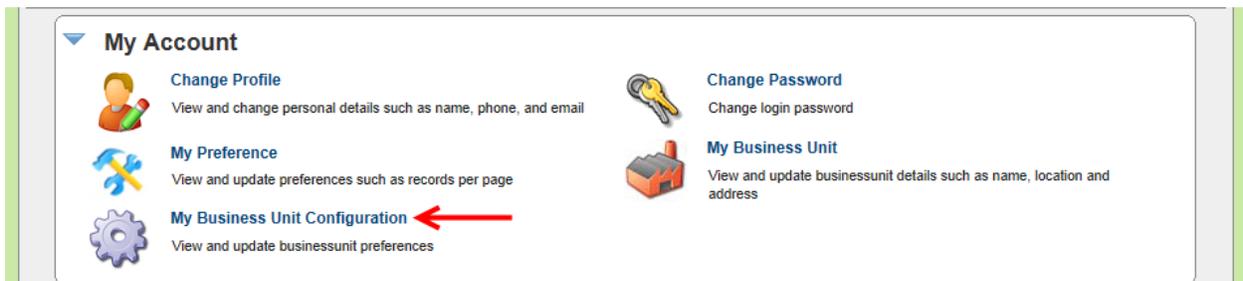


Quick Tip – This is mainly used for items that are set up as “Forecast”. If the supplier cannot ship what is on order and it is outside of the tolerance range in the item set up, a temp card will be created for the remaining quantity that could not be shipped. The temp card would then be destroyed at consumption or receipt depending on your configuration.

To navigate to the “Create Temp Cards for Partial Shipment” click on “My Account”



Click on “My Business Unit Configuration”



Click on the “Ship” tab



Click on the drop down arrow in the “Temporary Card Creation for Partial Shipment” field and make your selection. Click on the “Save” button

Name	Value
Force Packing Slip No in Ship Screen: ?	<input type="checkbox"/> OFF
Auto Ship on Close Production: ?	<input checked="" type="checkbox"/> ON
Temporary Card Creation for Partial Shipments: ?	Selected Items
Maximum length for Packing Slip Number: ?	<input type="text" value="64"/>
Enforce unique packing slip numbers from suppliers: ?	<input checked="" type="radio"/> Selected Items

* Required field



Important –

If you choose All Items this is what you will see under the Card Cycle settings:

Temporary card will be created for Partial Shipment - **Yes**

If you choose Selected Items this is what you will see under the Card Cycle settings:

Create Temporary Card for Partial Shipment.

If you choose None, you will not see anything.

[*Return to Card Cycle Settings –Plant*](#)

Setting up a Rule

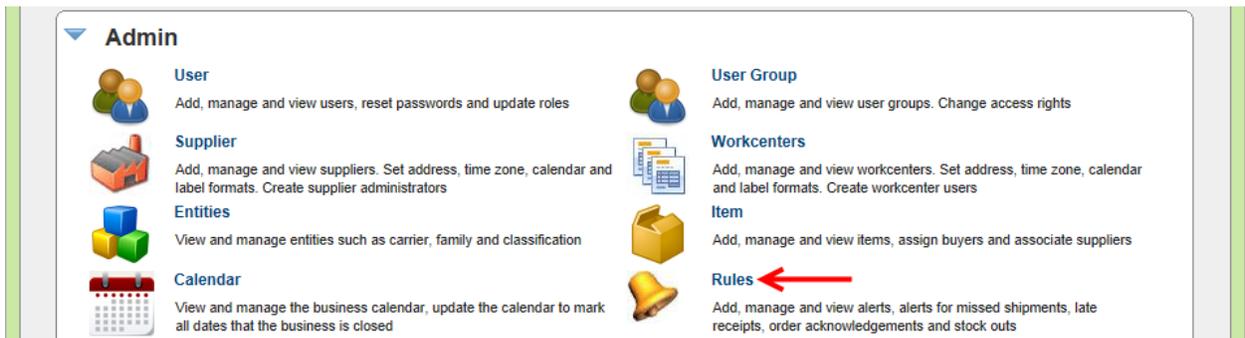
For more **detailed instructions** on setting up rule, **click** on the **link below** and you will **navigate** to the “**Ultriva Help Portal/Rules**” section.

<http://help.ultrivalms.com/v70/pdf/en-us/Admin-Referenceguide-rev1.pdf>

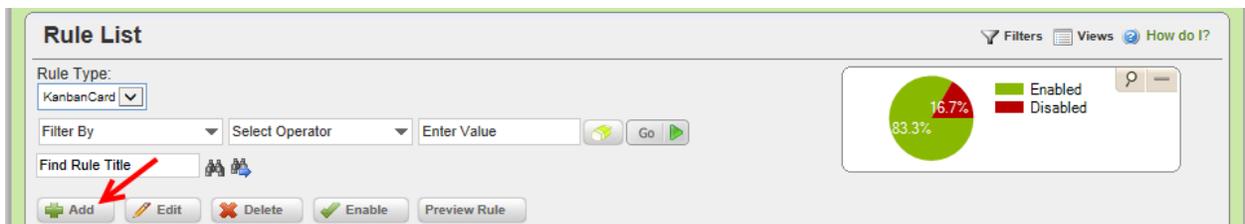
Click on “Admin”



Click on “Rules”



Click on the “Add” button



Select Rule Template

Enter a “Rule Title”

Rule Wizard: Select Rule Template How do I?

Select Rule Template Message Information Repeat Information

Rule Information

* What is the Title of the Rule?

Blanket Order Quantity

Click on “When Blanket Qty is below X days of UsagePerDay” to **highlight** the line. Click on the “Select” button. *You may have to Click on the drop down arrow to find this selection.*

Rule Wizard: Select Rule Template How do I?

Select Rule Template Message Information Repeat Information

Rule Information

* What is the Title of the Rule?

Blanket Order Quantity

* Notify the Users

- Kanban Card is Recalled
- When Supplying Business Unit does not have Inventory
- When Blanket Qty is below X days of UsagePerDay**
- When Goods are due in X days
- When Card Production is Closed or Reset
- When Inventory is Issued or Transferred
- First Consignment
- When Card is Deleted

Select

Click on the X

Notify users When Blanket Qty is below X days of UsagePerDay. Apply this rule to Items: [all Items](#) and Suppliers: [all Suppliers](#)

Enter the “Value” and Click on the “Apply” button.

Select Field Values

Enter Value:

Apply Clear Cancel

The selected **number appears**. Click on **“all Items”**

* Rule Description

Notify users When Blanket Qty is below **3** days of UsagePerDay. Apply this rule to Items: [all Items](#) and Suppliers: [all Suppliers](#)

Click in the **box next to the item number** you want to select and a **checkmark will appear**. Click on the **“Apply”** button.

Select Field Values

<input type="checkbox"/> ="711000000000"	<input type="checkbox"/> ="716000000000"	<input type="checkbox"/> ="718000000000"
<input type="checkbox"/> ="723000000000"	<input type="checkbox"/> ="827000000000"	<input type="checkbox"/> ="891000000000"
<input type="checkbox"/> ="901000000000"	<input type="checkbox"/> ="902000000000"	<input checked="" type="checkbox"/> 24680
<input type="checkbox"/> 24689	<input type="checkbox"/> 41410-010P9-00	<input type="checkbox"/> 41410-030K7-00
<input type="checkbox"/> 41410-030M5-B1	<input type="checkbox"/> 41410-040P4-B0	<input type="checkbox"/> 41410-110P2-E0
<input type="checkbox"/> 41410-120M5-B1	<input type="checkbox"/> 41410-140P4-B1	<input type="checkbox"/> 41410-210P2-B0
<input type="checkbox"/> 41410-220M5-B0	<input type="checkbox"/> 41410-240P4-E0	<input type="checkbox"/> 41410-320M5-E0
<input type="checkbox"/> 41410-340P4-B0	<input type="checkbox"/> 41410-420M2-00	<input type="checkbox"/> 41410-440P4-B0
<input type="checkbox"/> 41410-640P4-E0	<input type="checkbox"/> 58293-X1B00-00	<input type="checkbox"/> 58293-X1B01-00
<input type="checkbox"/> 58293-X1B02-00	<input type="checkbox"/> 58293-X1B07-00	<input type="checkbox"/> 58293-X1B08-00
<input type="checkbox"/> 58293-X1B09-00	<input type="checkbox"/> 58293-X1B10-00	<input type="checkbox"/> 58293-X1B11-00
<input type="checkbox"/> 58293-X1B12-00	<input type="checkbox"/> 58293-X1B13-00	<input type="checkbox"/> 58293X1B2700
<input type="checkbox"/> 58293X1B3600	<input type="checkbox"/> 58293X1B3700	<input type="checkbox"/> 58293X1B3800

The selected item number appears. Click on [“all Suppliers”](#)

* Rule Description

Notify users When Blanket Qty is below 3 days of UsagePerDay. Apply this rule to Items: [24680](#) and Suppliers: [all Suppliers](#)

Click in the **box** next to the **“Supplier”** name and a **checkmark will appear**. Select the **“Supplier(s)”** to **apply** this **rule** to. Click on the **“Apply”** button.

You may have to click on the drop down arrow to view all suppliers

Select Field Values

<input checked="" type="checkbox"/> A&G Machining	<input type="checkbox"/> Accushape	<input type="checkbox"/> Ainak
<input type="checkbox"/> Aisin Canada	<input type="checkbox"/> Aisin DS	<input type="checkbox"/> Aisin Electronics
<input type="checkbox"/> Aisin Electronics DS	<input type="checkbox"/> AISIN ELECTRONICS INC (DS)	<input type="checkbox"/> AISIN ELECTRONICS LLC (DS) - Site 2
<input type="checkbox"/> Aisin USA	<input type="checkbox"/> AISIN WORLD CORP OF AMERICA	<input type="checkbox"/> AMP Plastics
<input type="checkbox"/> Ample Supply Company	<input type="checkbox"/> Anchor Industrial Adhesives	<input type="checkbox"/> APLIX INC
<input type="checkbox"/> ARJ Manufacturing	<input type="checkbox"/> ARJ MANUFACTURING LLC	<input type="checkbox"/> AVS Inc
<input type="checkbox"/> Azdel Composite & Material	<input type="checkbox"/> BASELL USA INC	<input type="checkbox"/> BCD Mexico
<input type="checkbox"/> Bend All	<input type="checkbox"/> BEND ALL AUTOMOTIVE INC.	<input type="checkbox"/> BLUE GRASS METALS INC
<input type="checkbox"/> Bluegrass Metals	<input type="checkbox"/> Bostik	<input type="checkbox"/> BOSTIK INC
<input type="checkbox"/> Bostitch	<input type="checkbox"/> BRASKEM PHILADELPHIA	<input type="checkbox"/> Bridgestone
<input type="checkbox"/> BRIDGESTONE APM COMPANY	<input type="checkbox"/> Campi	<input type="checkbox"/> Car Sup1

Click on the “Next” button

Select Rule Template Message Information Repeat Information

Rule Information

* What is the Title of the Rule?
Blanket Order Quantity

* Notify the Users

- When reschedule is approved by buyer
- When reschedule is rejected by buyer
- Delayed Operation
- New Non-Replenishment Card is released
- Kanban Card is Recalled
- When Supplying Business Unit does not have Inventory
- When Blanket Qty is below X days of UsagePerDay**
- When Goods are due in X days

Select

* Rule Description

Notify users When Blanket Qty is below 3 days of UsagePerDay. Apply this rule to Items: 24681 and Suppliers: A&G Machining

* Required field

Next | X | Cancel

Message Information

“Send message via:” click in the box next to a selection and a checkmark will appear. Select “Browser” or “Email” or “Both”. “Table” is used internally for integration.

Rule Wizard: Message Information How do I?

Select Rule Template Message Information Repeat Information

Message Information

* Send message via:

Table Browser Email

Preview Rule

“Message Recipient:” Select the “Users” to “Send” the message to.

You have 2 choices. You can choose by roles or you can also add user names.

* Message Recipient:

Buyer User Supplier User Quality User Purchase User Supplier Contact

makil x



Quick Tip – You can click on the “Insert Field” hyperlink to “Add” fields to your message. Once the field is inserted, click after the inserted field and press the space bar to add a space. You can now type in a message you would like to see by that field. You can select many fields or just type a message.

Message Subject

Enter a “Message Subject” Click on “Insert Field”



Quick Tip – There are 4 fields to choose from. All fields have many selections. Choose what will best fit in the rule. For our example our “Rule” will include the “PO Number” since we are tracking our “Blanket Order Quantity”.

Click on the “Item Fields” tab. Select “Item No” Click on the “Insert” button.

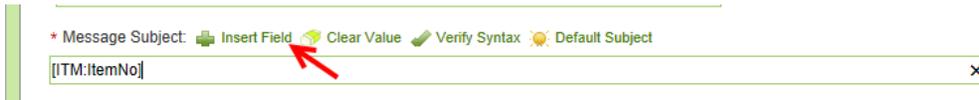
The selection appears



* Message Subject:  Insert Field  Clear Value  Verify Syntax  Default Subject

[ITM:ItemNo] 

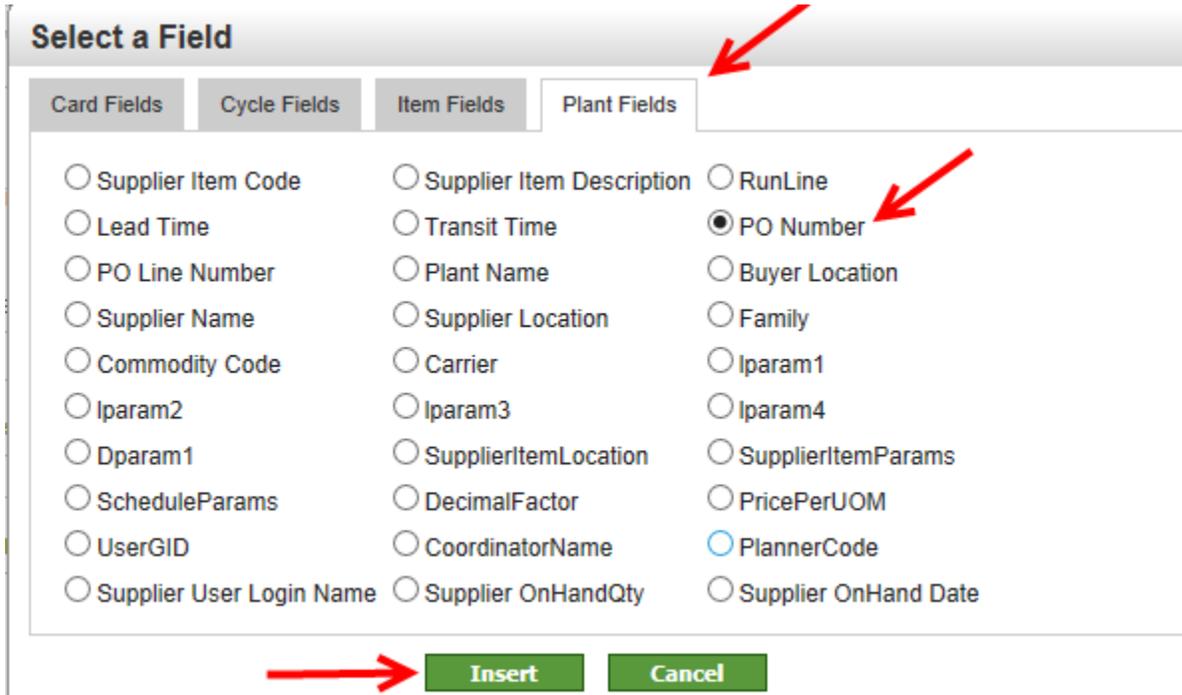
Click on “Insert Field”



* Message Subject:  Insert Field  Clear Value  Verify Syntax  Default Subject

[ITM:ItemNo] 

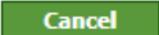
Click on the “Plant Fields” tab. Select “PO Number”



Select a Field

Card Fields Cycle Fields Item Fields **Plant Fields**

<input type="radio"/> Supplier Item Code	<input type="radio"/> Supplier Item Description	<input type="radio"/> RunLine
<input type="radio"/> Lead Time	<input type="radio"/> Transit Time	<input checked="" type="radio"/> PO Number
<input type="radio"/> PO Line Number	<input type="radio"/> Plant Name	<input type="radio"/> Buyer Location
<input type="radio"/> Supplier Name	<input type="radio"/> Supplier Location	<input type="radio"/> Family
<input type="radio"/> Commodity Code	<input type="radio"/> Carrier	<input type="radio"/> Iparam1
<input type="radio"/> Iparam2	<input type="radio"/> Iparam3	<input type="radio"/> Iparam4
<input type="radio"/> Dparam1	<input type="radio"/> SupplierItemLocation	<input type="radio"/> SupplierItemParams
<input type="radio"/> ScheduleParams	<input type="radio"/> DecimalFactor	<input type="radio"/> PricePerUOM
<input type="radio"/> UserGID	<input type="radio"/> CoordinatorName	<input type="radio"/> PlannerCode
<input type="radio"/> Supplier User Login Name	<input type="radio"/> Supplier OnHandQty	<input type="radio"/> Supplier OnHand Date

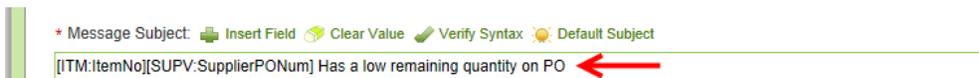
The selection appears



* Message Subject:  Insert Field  Clear Value  Verify Syntax  Default Subject

[ITM:ItemNo][SUPV:SupplierPONum] 

To add additional information to the “Message Subject”, Press on the space bar to create a space in between your previous selection and the “Additional Information”. Enter the “Additional Information”



* Message Subject:  Insert Field  Clear Value  Verify Syntax  Default Subject

[ITM:ItemNo][SUPV:SupplierPONum] Has a low remaining quantity on PO 



Quick Tip – Repeat the steps above to “Insert Field” and to add information to the “Message Body”.

Message Body

Enter a “Message Body”. Click on the “Next” button.

* Message Body: Insert Field Clear Value Verify Syntax Default Body

Check on the PO Quantity and create a new PO

Append Notes

* Required field

< | Prev **Next | >** X | Cancel

Repeat Information

Select the choices for how often you would like the alert sent.

To “Repeat” just add a number for how many times you would like the alert to “Repeat”. Then Click on the **drop down arrow** and select how often you would like the alert sent. Click on the “Finish” button.

Rule Wizard: Repeat Information How do I?

Select Rule Template Message Information Repeat Information

Repeat Information

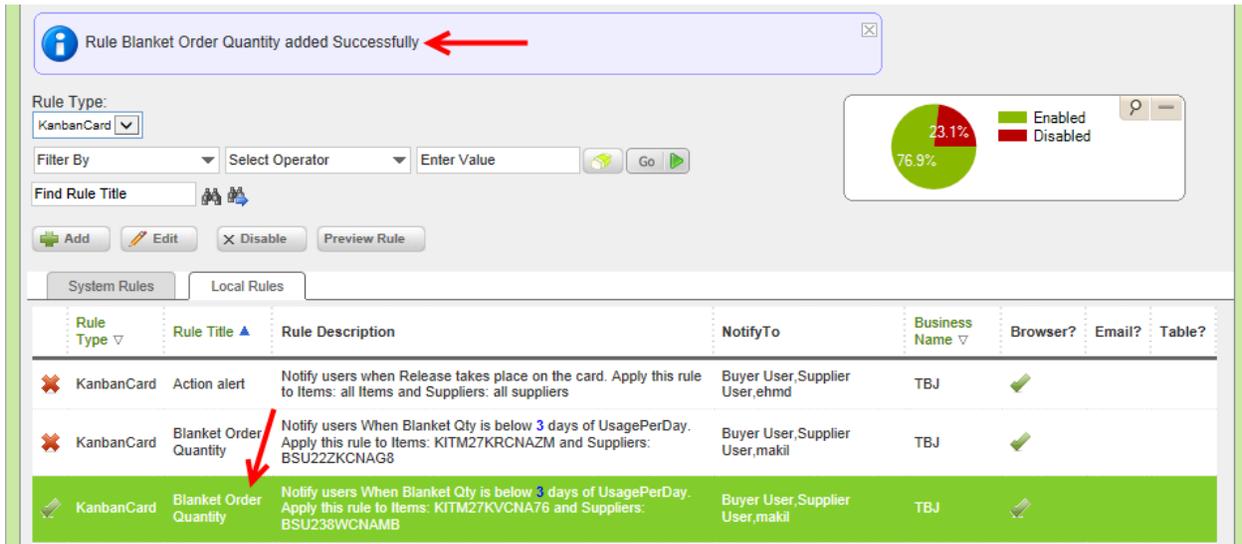
Repeat: 1 Times (0 = no repeat)

Every: 1 Days
Hours
Minutes

* Required field

< | Prev **Finish | >** X | Cancel

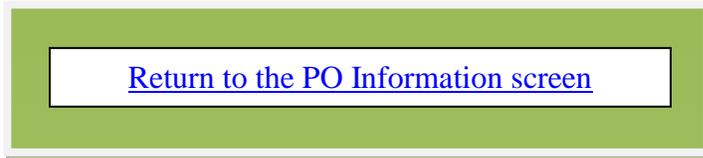
The “Rule” has been “Added Successfully”



The screenshot shows a web interface for managing rules. At the top, a blue notification box states "Rule Blanket Order Quantity added Successfully" with a red arrow pointing to it. Below this, there are controls for "Rule Type" (set to KanbanCard), "Filter By", "Select Operator", and "Enter Value". A circular progress indicator shows 76.9% Enabled (green) and 23.1% Disabled (red). A table below lists rules with columns: Rule Type, Rule Title, Rule Description, NotifyTo, Business Name, Browser?, Email?, and Table?. The table has three rows, with the bottom row highlighted in green and a red arrow pointing to its "Rule Title" column.

Rule Type	Rule Title	Rule Description	NotifyTo	Business Name	Browser?	Email?	Table?
KanbanCard	Action alert	Notify users when Release takes place on the card. Apply this rule to Items: all Items and Suppliers: all suppliers	Buyer User,Supplier User,ehmd	TBJ	✓		
KanbanCard	Blanket Order Quantity	Notify users When Blanket Qty is below 3 days of UsagePerDay. Apply this rule to Items: KITM27KRCNAZM and Suppliers: BSU22ZKCNA8	Buyer User,Supplier User,makil	TBJ	✓		
KanbanCard	Blanket Order Quantity	Notify users When Blanket Qty is below 3 days of UsagePerDay. Apply this rule to Items: KITM27KVCNA76 and Suppliers: BSU238WCNAMB	Buyer User,Supplier User,makil	TBJ	✗		

Click on the link below to “Return to the PO Information” screen.

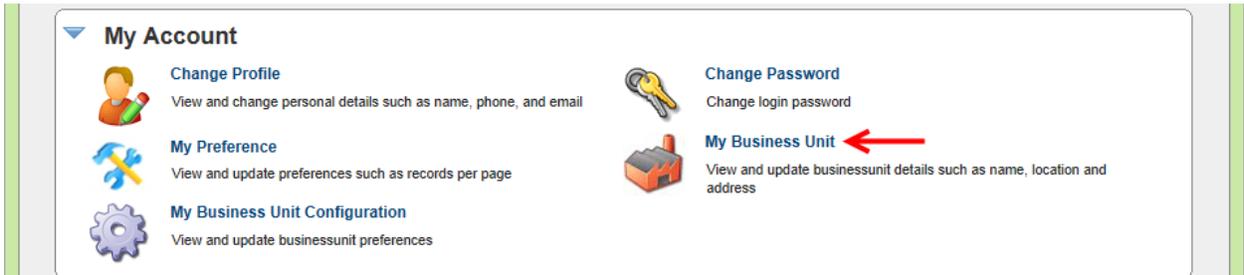


Security Policy Information

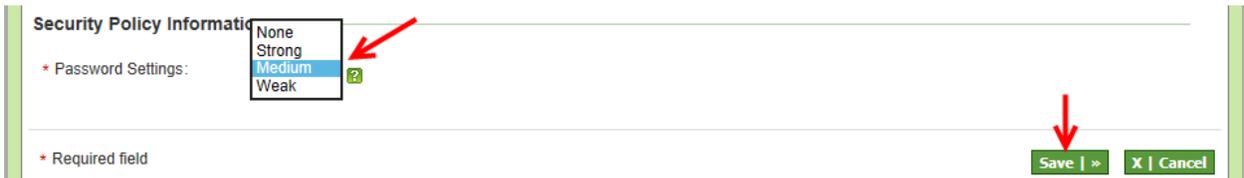
Click on “My Account”



Click on my “Business Unit”



Click on the **drop down arrow** to make your selection. Click on the “Save” button



Strong: Every 90 Days
Password should be changed.
Minimum Length: 8 Characters
with at least 1 upper case alpha,
1 lower case alpha, 1 numeric
and 1 special character.
Medium: Every 90 Days
Password should be changed.
Minimum Length: 6 characters
with at least 1 alpha and 1
numeric character. **Weak:**
Minimum Length: 6 characters.
None: Minimum Length: 4
characters.

Click on the link below to “Return to Adding a Supplier User”



Apply to All (Auto Fill)



Quick Tip – You can click in the “Card ID” box in the column header and it will select all of the cards. A checkmark will appear by each line item.



Tool Tip – The Apply to All icon  is located on all “Action” screens where repeated data is entered. Data such as “Locations”, “PO’s”, new “Ship Dates” and such are a few of the processes where this tool comes in real handy.

When you have **navigated to a screen** which requires **repeated data** to be entered, **click** in the “**Card ID**” boxes and a **checkmark** will appear.

<input checked="" type="checkbox"/> Card ID ▲	Item ▲	Supplier Name ▼	Release Date ▼	Reqd Ship ▼	Reqd Receive ▲	Card Qty ▼	PO #	PO Line #	Release #	Release Line #
<input checked="" type="checkbox"/>	KCD4MYKCNAHQ	24687 LJM Machining Supplies	12/27/2013	01/02/2014	01/05/2014	50	<input type="text"/>	0	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	KCD4MYLCNAEH	24687 LJM Machining Supplies	12/27/2013	01/02/2014	01/05/2014	50	<input type="text"/>	0	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	KCD4MYMCNARC	24687 LJM Machining Supplies	12/27/2013	01/02/2014	01/05/2014	50	<input type="text"/>	0	<input type="text"/>	<input type="text"/>

To “**Auto Fill**” information such as a “**PO**” and “**PO Line #**”, **Enter** in the “**PO#**” in the PO# field and **Click** on the “**Apply to All**” icon. 

<input checked="" type="checkbox"/> Card ID ▲	Item ▲	Supplier Name ▼	Release Date ▼	Reqd Ship ▼	Reqd Receive ▲	Card Qty ▼	PO #	PO Line #	Release #	Release Line #
<input checked="" type="checkbox"/>	KCD4MYKCNAHQ	24687 LJM Machining Supplies	12/27/2013	01/02/2014	01/05/2014	50	<input type="text"/>	0	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	KCD4MYLCNAEH	24687 LJM Machining Supplies	12/27/2013	01/02/2014	01/05/2014	50	<input type="text"/>	0	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	KCD4MYMCNARC	24687 LJM Machining Supplies	12/27/2013	01/02/2014	01/05/2014	50	<input type="text"/>	0	<input type="text"/>	<input type="text"/>

The **data** is now **populated** in each line item checked.

Set PO Cards List Views How do I?

Find Card ID

PO. #

PO. Line #

Release #

Release Line #

<input type="checkbox"/>	Card ID ▲	Item ▲	Supplier Name ▼	Release Date ▼	Reqd Ship ▼	Reqd Receive ▲	Card Qty ▼	PO #	PO Line #	Release #	Release Line #
<input checked="" type="checkbox"/>	KCD4MYKCNABQ	24687	LJM Machining Supplies	12/27/2013	01/02/2014	01/05/2014	50	252525	0		
<input checked="" type="checkbox"/>	KCD4MYLCNAEH	24687	LJM Machining Supplies	12/27/2013	01/02/2014	01/05/2014	50	<input type="text" value="252525"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	KCD4MYMCNARC	24687	LJM Machining Supplies	12/27/2013	01/02/2014	01/05/2014	50	<input type="text" value="252525"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="text"/>

[Return to Creating Cards](#)