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# Ultriva 7.6 and Higher Common Reports Reference Guide

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## Reports Overview



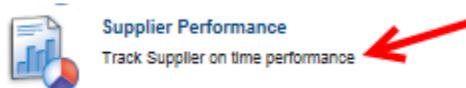
*Quick Tip - Reports are created for the user to extract data from the Ultriva application for further analysis.*

*The most common reports used will be discussed in this guide.*

**Buyer Reports**

<b>Buyer Status</b> Shows distribution of Card for each Item	<b>Excel Reports</b> View & Export data to Excel
<b>Supplier Performance</b> Track Supplier on time performance	<b>Red Item Analysis</b> View and Analyze red Items.
<b>Savings Analysis By Time</b> View Inventory levels, safety stock and consumption data over time	<b>Kanban Inventory</b> View Kanban Inventory Report
<b>Supplier On-Time</b> Track Supplier on time shipment/Receipt performance	<b>Cycle Time</b> Compare actual lead times with negotiated lead times
<b>Stock Out</b> View Stock-out Report	<b>Inventory Cost</b> View Inventory Cost Report
<b>Supplier Scorecard</b> View Supplier Scorecard Report	<b>Outstanding Shipments</b> View a list of orders that are due on or before today
<b>OnHand Inventory</b> View Inventory Status Report	<b>Outstanding Receipts</b> View a list of orders that are due on or before today
<b>Total Spend Report</b> View Total Spend Report	<b>Card Aging</b> View Card Aging Report
<b>View Notes History</b> View Notes History Report	<b>Audit On Hand Summary</b> View Audit On Hand Summary Report
<b>Receipts Due</b> View Receipts Due Report	<b>Forecast and Historical</b> View Forecast Demand and Historical Usage

*When choosing a “Report”, below the “Report Title” states what information will be in the report output.*



*For more detailed information on each “Report”, click on the link below to navigate to the “Ultriva Help Portal”, Reports Reference Guide.*

[Reports Reference Guide](#)

## Supplier Performance



*Quick Tip - The “On Time Performance” of the Supplier, can be tracked for both “Shipment” and “Receipt” accuracy.*

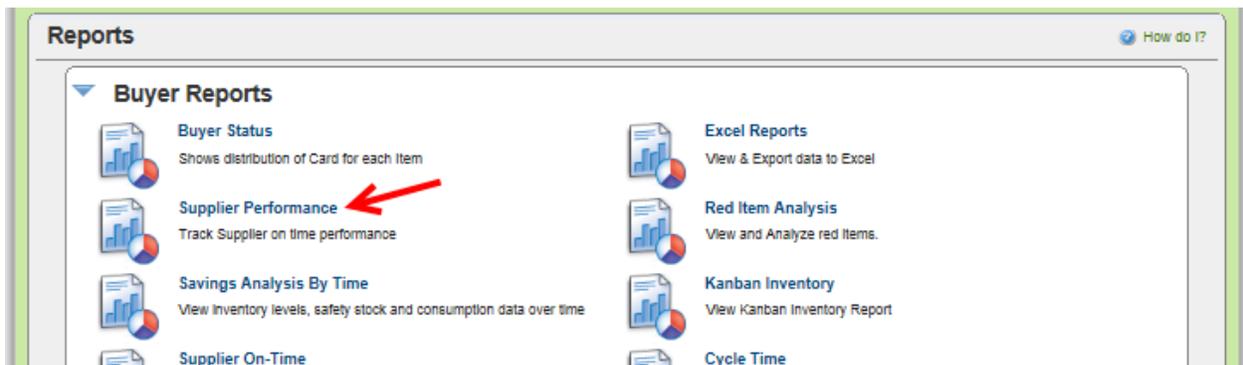
*Having the ability to drill down to the item level can be very beneficial when looking into certain items possibly causing an accuracy issue.*

*This report may also help to determine the “Safety Stock” sizing. if there is a supplier who is late on shipments on a continuous basis, you may need to resize the kanban to prevent a “Stock Out” condition.*

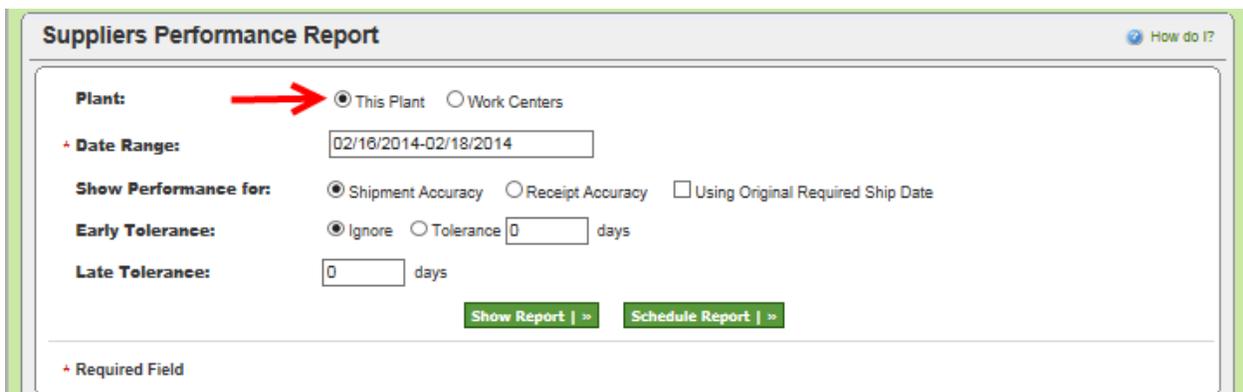
To navigate to the “Supplier Performance” report, click on “Reports”



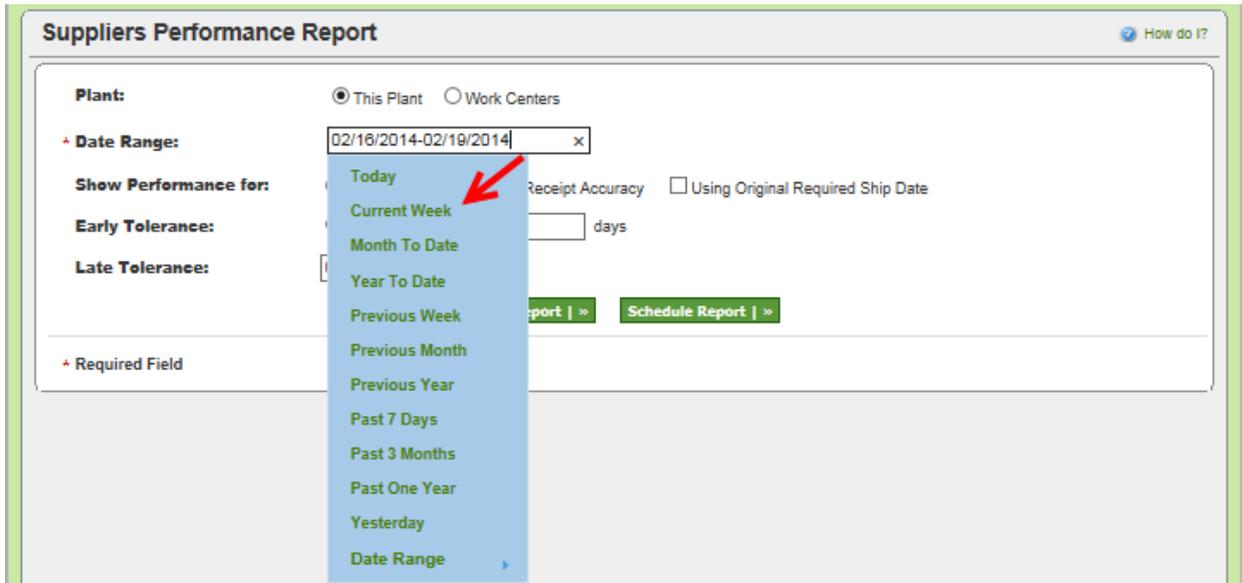
Click on “Supplier Performance”



Select an option in the “Plant” fields.

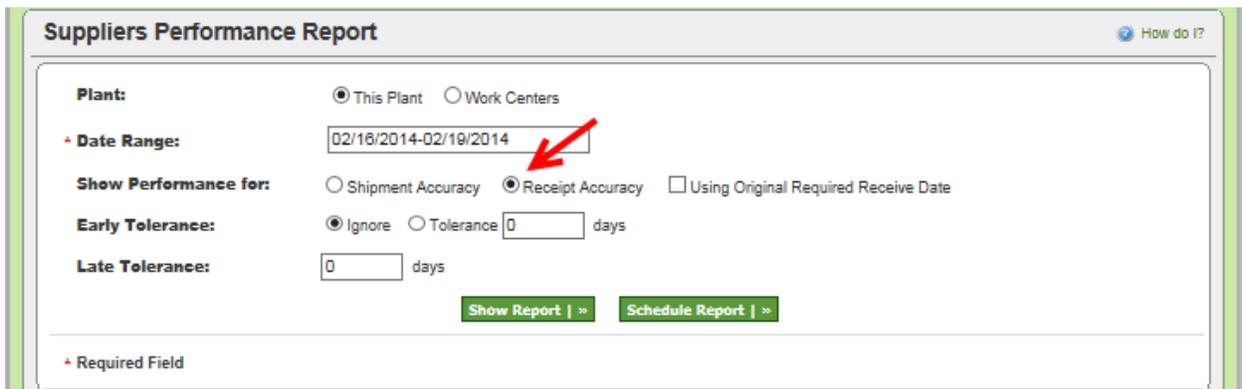


Click in the “Date Range” field and a drop down box appears with the “Date” selections. Click on a selection. *This example we will select “Current Week”*



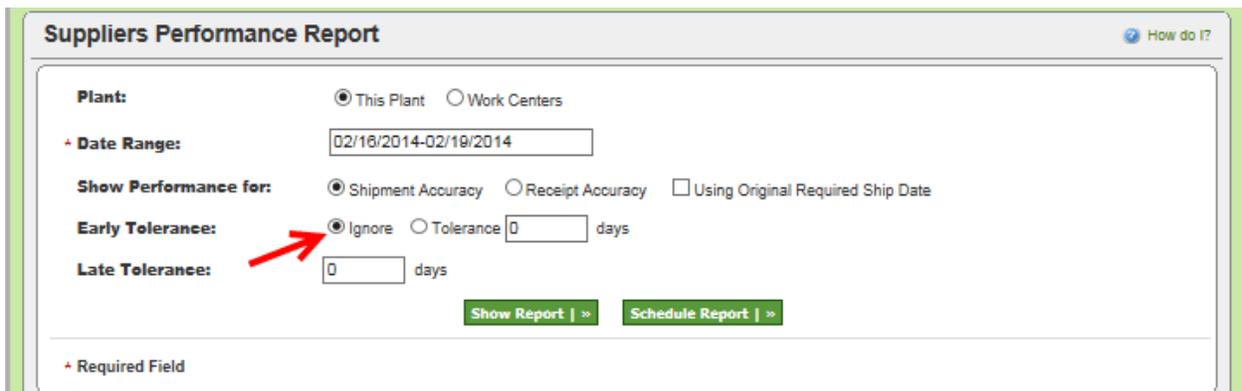
The screenshot shows the 'Suppliers Performance Report' form. The 'Date Range' field contains '02/16/2014-02/19/2014'. A dropdown menu is open, listing various date selection options: Today, Current Week, Month To Date, Year To Date, Previous Week, Previous Month, Previous Year, Past 7 Days, Past 3 Months, Past One Year, Yesterday, and Date Range. A red arrow points to 'Current Week'. Other fields include 'Plant' (This Plant selected), 'Show Performance for:' (Receipt Accuracy selected), and 'Early Tolerance:' (0 days).

Select a “Show Performance for:” option. *In this example we will select “Receipt Accuracy”*



The screenshot shows the 'Suppliers Performance Report' form. The 'Date Range' field contains '02/16/2014-02/19/2014'. The 'Show Performance for:' field has 'Receipt Accuracy' selected. A red arrow points to the 'Date Range' field. Other fields include 'Plant' (This Plant selected), 'Early Tolerance:' (Ignore selected), and 'Late Tolerance:' (0 days).

Select an “Early Tolerance” option.



The screenshot shows the 'Suppliers Performance Report' form. The 'Date Range' field contains '02/16/2014-02/19/2014'. The 'Show Performance for:' field has 'Shipment Accuracy' selected. The 'Early Tolerance:' field has 'Ignore' selected. A red arrow points to the 'Early Tolerance:' field. Other fields include 'Plant' (This Plant selected) and 'Late Tolerance:' (0 days).

**If Applicable:** Enter a number in the “Late Tolerance” field. Click on the “Show Report” button.

**Suppliers Performance Report** How do I?

**Plant:**  This Plant  Work Centers

**Date Range:** 02/16/2014-02/19/2014

**Show Performance for:**  Shipment Accuracy  Receipt Accuracy  Using Original Required Receive Date

**Early Tolerance:**  Ignore  Tolerance 0 days

**Late Tolerance:** 0 days

+ Required Field

The “Report” appears

**Suppliers Performance By Supplier** How do I?

Plant: TBJ, Date Range: 02/16/2014-02/19/2014, Early Tolerance: Ignore, LateTolerance: 0 days, Show Performance for Receipt Accuracy Change Filter

Supplier Name ▲	Plant Name ▲	Cards To Be Received ▾	Received Cards ▾	Received Cards on Time ▾	Delivery Performance ▾	Suggestion
A&G Machining	TBJ	17	3	1	5.8824	⚠
LJM Machining Supplies	TBJ	15	13	5	33.3333	⚠
<b>Total</b>		<b>32</b>	<b>16</b>	<b>6</b>	<b>18.75</b>	

Sorted by: Supplier Name, Business Name 1 to 2 of 2



*Quick Tip – The results are as follows:*

*Supplier Name*

*Plant Name*

*Cards to be Received*

*Received Cards*

*Received Cards on Time*

*Delivery Performance*

*Suggestions- If a “Yellow” triangle appears, hover the mouse over the triangle for a suggestion on what to do.*

*The report above show that the LJM Machining suppliers “Delivery Performance is 100%. The orders were “Receive On Time”. The AG Machining supplier has a delivery performance of 33.33%. Out of the 3 orders only 1 was “Received On Time”*



*Tool Tip – A “Key Performance” indicator for safety stock would be to take a look at the suppliers performance and for an example, if they are at 95% accurate than 5% more safety stock is needed in the loop to prevent “Stock Outs”.*

Ultriva sends a “Warning” signal (yellow triangle) and a “suggestion”. **Hover** the mouse over the “Triangle” to get the suggestion. Here it states: “Performance is poor. Please analyze further to see if the safety stock has to be increased to avoid Stock Outs”

Supplier Name	Plant Name	Cards To Be Received	Received Cards	Received Cards on Time	Delivery Performance	Suggestion
A&G Machining	TBJ	17	3	1	5.8824	⚠
LJM Machining Supplies	TBJ	15	13			
Total		32	16	6	18.75	

To further “Drill Down” to the item level, click on the “Supplier”

Supplier Name	Plant Name	Cards To Be Received	Received Cards	Received Cards on Time	Delivery Performance	Suggestion
A&G Machining	TBJ	3	3	1	33.3333	⚠
LJM Machining Supplies	TBJ	2	2	2	100	
Total		5	5	3	60	

The “Items” appear. The “Item” level also has the “Warning” signal (yellow triangle) and a “suggestion”. **Hover** the mouse over the “Triangle” to get the suggestion. **Click** on the “Item” number to **drill down** to the individual “Card ID”.

Item	Cards To Be Received	Received Cards	Received Cards On Time	Delivery Performance	Suggestion
24680	11	1	1	9.0909	⚠
24681	6	2	0		
Total	17	3	1	5.8824	

 **Tool Tip** – The report provides flexibility to see whether the supplier performance is consistent across all items or that there may be supply issues with just a few.

The “Card ID(s)” appear.

**Suppliers Performance By CardID**  Views How do I? Change Filter | Back to Summary

Item No: 24680, Date Range: 02/16/2014-02/19/2014, [Show Performance for Receipt Accuracy](#)

Card ID ▲	Cycle No ▼	Reqd Receive ▼	Receive Date ▼	Time zone ▼	On Time ▼
KCD4MV6CNAP8	6	02/19/2014	-	JST.JP	✘
KCD4MV7CNAG5	9	02/19/2014	02/19/2014	JST.JP	✔
KCD4MV8CNAEP	5	02/19/2014	-	JST.JP	✘
KCD4MV9CNARJ	5	02/20/2014	-	JST.JP	✘
KCD4MVACNAN5	5	02/20/2014	-	JST.JP	✘
KCD4MVDCNAPK	7	02/20/2014	-	JST.JP	✘
KCD4MVECNAGN	5	02/20/2014	-	JST.JP	✘
KCD4MVFCNAKU	5	02/20/2014	-	JST.JP	✘
KCD4MVGCNACZ	7	02/19/2014	-	JST.JP	✘
KCD4MVHCNAAB	7	02/20/2014	-	JST.JP	✘
KCD4MVKCNAR9	5	02/19/2014	-	JST.JP	✘

Sorted by: Card ID 1 to 11 of 11



*Quick Tip – The results are as follows:*

*Card ID*  
*Cycle Number*  
*Requested Receive*  
*Receive Date*  
*Time Zone*  
*On Time*



*Tool Tip – Analyze the “Card ID, Cycle No.” to see if it is uniform across all cycles or that some outliers are tilting the average.*

## Red Item Analysis – Late Deliveries



*Quick Tip – When cards reach a “Red” level, an “Action” needs to take place. This report looks at “Late Deliveries” and “Increasing Demand.”*

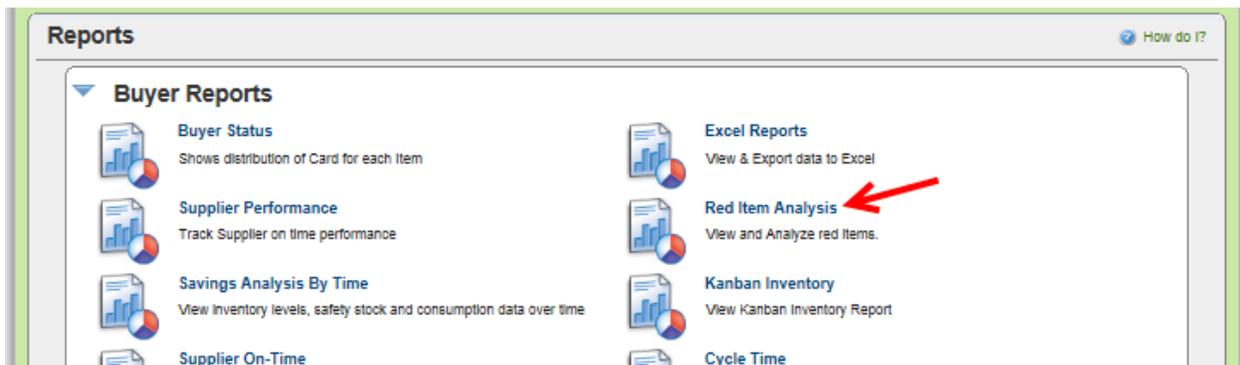
*Late Deliveries will show the late orders, next expected delivery and when you will stock out.*

*Increasing Demand will show the increased usage, sizing recommendations and days until a stock out.*

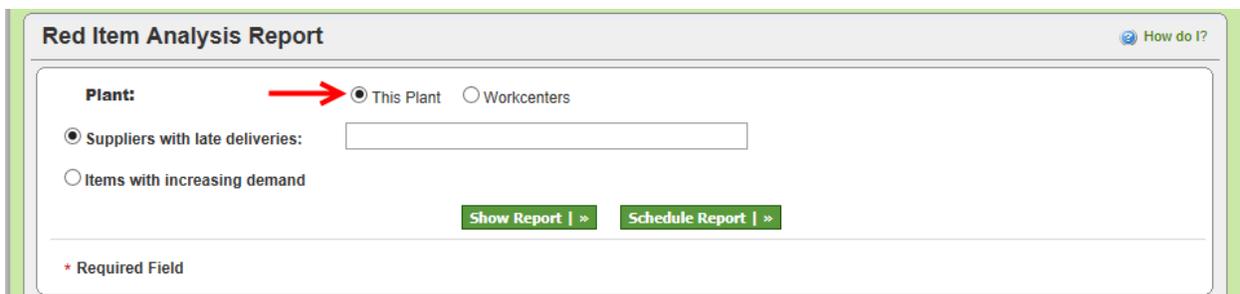
To navigate to the “Red Item Analysis” report, click on “Reports”



Click on “Red Item Analysis”



Select a “Plant” option.





**Quick Tip** –These reports will show either the supplier did not ship on time or that the parts are being consumed above the daily usage set in Ultriva. You can choose a specific supplier or all suppliers.

Click in the “Suppliers with Late Deliveries” field and press on the spacebar. A dropdown list appears, click on the “Supplier”. In this example we will leave this field blank so the report shows “All Suppliers”. Click on “Show Report”

The “Report” appears.

Item	Supplier Name	Cards On Hand	Target Cards in Hand	% of Target	Late Cards	Days Over Due	Cards in Transit	Expected Delivery	Days till Stock Out
24680	A&G Machining	10	10	100.00	10	0	10	02/18/2014	5.00
24687	LJM Machining Supplies	7	10	70.00	5	0	3	02/20/2014	3.50
41410-010P9-00	GRN Stampings	1	3	33.33	3	188	0	02/21/2014	0.67



**Quick Tip** – The results are as follow:

- Item Number*
- Supplier Name*
- Cards On Hand*
- Target Cards On-Hand*
- % of Target Late Cards*
- Days Over Due*
- Cards in Transit*
- Expected Delivery*
- Days til Stock Out*



**Tool Tip** – This information will allow the user to take actions prior to having a part stock- out. This data can be shared with the suppliers having the issues with “Late Deliveries”.

## Red Item Analysis – Increase in Demand

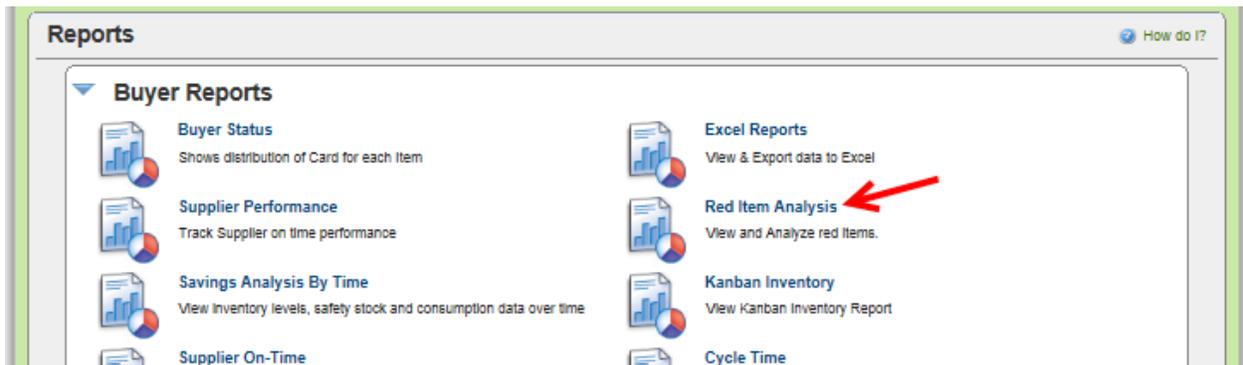


*Quick Tip – Increasing Demand will show the increased usage, sizing recommendations and days until a stock out.*

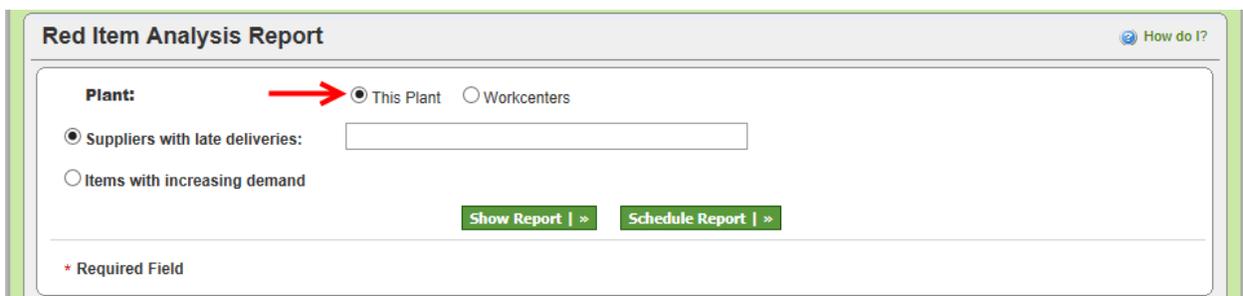
To navigate to the “Red Item Analysis” report, click on “Reports”



Click on “Red Item Analysis”



Select a “Plant” option.



Click in the circle next to “Items with Increasing Demand”, to select it. Click on the “Show Report” button.

**Red Item Analysis Report** How do I?

**Plant:**  This Plant  Workcenters

Suppliers with late deliveries:

Items with increasing demand

**Show Report | >>** **Schedule Report | >>**

\* Required Field

The “Report” appears.

**Red Items With Increasing Demand** Views How do I? Change Filter

Option: Items with increasing demand, Plant: Demo Plant, OnDate: 10/17/2013

Item ▲	Cards On Hand ▼	Target Cards in Hand ▼	% of Target ▼	Standard Daily Demand ▼	Projected Usage Per Day ▼	CardsToAdd ▼	Days Till StockOut ▼
233525-01	1	2	50.00	10	26.74	1	2
235015-01	2	186	1.08	4	371.7	404	0



*Quick Tip – The results are as follow:*

- Item Number*
- Cards On Hand*
- Target Cards On-Hand*
- % of Target*
- Standard Daily Demand*
- Projected Usage per Day*
- Cards to Add*
- Days to Stock Out*



*Tool Tip – This report will also give the information on how many “Cards to Add” if the usage has increased. You can add the cards by using Ultriva’s “Auto Resize” feature.*  
**ADMIN>TOOLS>AUTO RESIZE**

## Card Aging Report

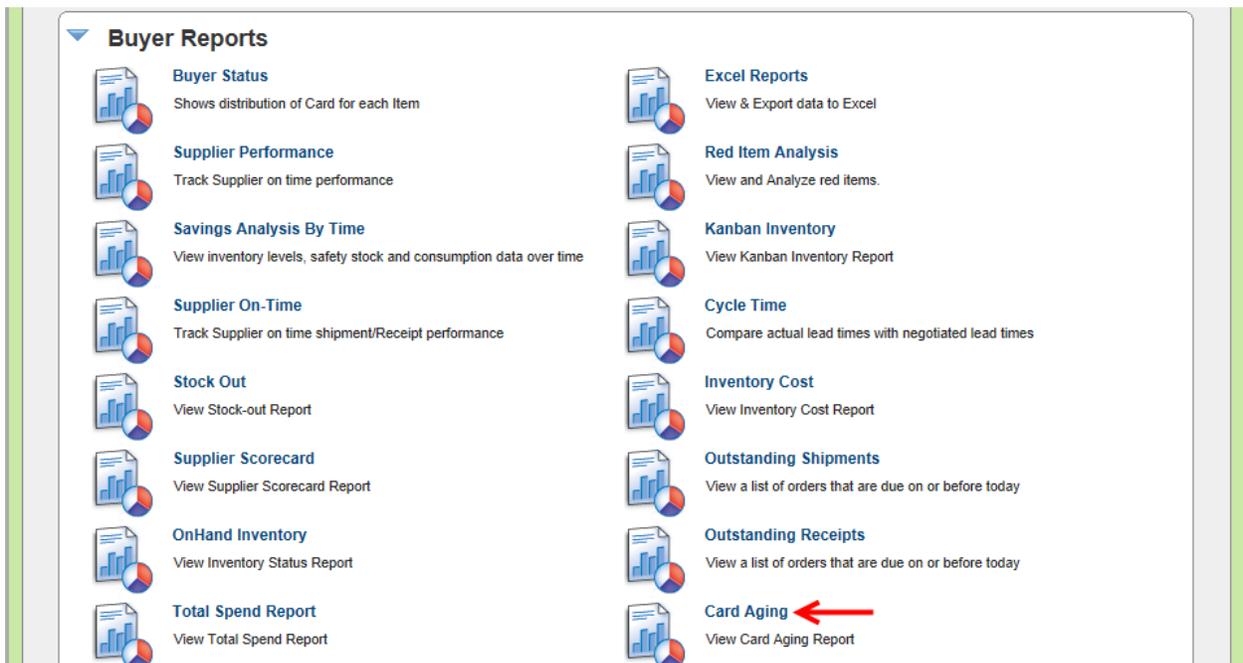


*Quick Tip – This report will allow the user to analyze how long cards have been in a particular status. The data may help to locate lost cards while at the same time, looking at how well the cards are being FIFO'd.*

To navigate to the “Card Aging” report, click on “Reports”.



Click on “Card Aging”





**Quick Tip** – There are many “Filter” options to choose from. Generally you would want to run this report by looking at the cards “On Hand” and then select a certain number of days to analyze.

The 3 “Status” selections are:

- On Hand*
- In Process*
- In Transit*

**Card Aging Report** How do I?

**Item:**

**Product Line:**

**Commodity Code:**

**Supplier:**

**Status:**

**Card Age:**  Aged >=  (days)  All Cards which are aged  % more than expected Consumption days

For this example we will “Filter” by a Supplier, On Hand for 90 Days.

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

**Card Aging Report** How do I?

**Item:**

**Product Line:**

**Commodity Code:**

**Supplier:**

**Status:**

**Card Age:**  Aged >=  (days)  All Cards which are aged  % more than expected Consumption days

- Leggett and Platt
- Lio Chem
- LIOCHEM INC
- LJM Machining Supp**
- LM TOOLS
- MATSU ASSEMBLY (I
- MCMP, Inc.
- METRICAN STAMPIN
- METRICAN STAMPIN

Click on the **dropdown arrow** in the “**Status**” field and a **dropdown list** appears. Make a **selection**. *In this example we will select “On-Hand”*

**Card Aging Report** How do I?

Item:

Product Line:

Commodity Code:

Supplier:

Status:  On Hand  
In Process  
In Transit

Card Age:  (days) ? (days)

All Cards which are aged  % more than expected Consumption days

[Show Report | >>](#) [Schedule Report | >>](#)

In the “**Card Age**” fields, select “**Aged**”. Enter the **number of days**. Click on the “**Show Report**” button.

**Card Aging Report** How do I?

Item:

Product Line:

Commodity Code:

Supplier:

Status:

Card Age:  Aged >=  (days) ? (days)

All Cards which are aged  % more than expected Consumption days

[Show Report | >>](#) [Schedule Report | >>](#)

The “**Report**” appears.

**Card Aging Report** How do I?

Age>=:90 days, Status:On Hand, Supplier:Selected Change Filter

RYG	Item No	Card ID	Card State	Cycle No	Default Supplier	Location Code	Last Received Time	Card Qty
<input checked="" type="checkbox"/>	ULT-035-0354-02	DU Bearing	Replenishment Cards (7)	Cards to be Destroyed (0)	Non-Replenishment Cards (0)			
		KCD39AECNASZ	On Hand	6	LJM Machining Supplies	1.2.3.4	08/29/2013	14400
<b>Total</b>		<b>1</b>						
<input checked="" type="checkbox"/>	ULT-035-0355-00	Bearing	Replenishment Cards (11)	Cards to be Destroyed (0)	Non-Replenishment Cards (50)			
		KCD4MXYCNAWL	On Hand	0	LJM Machining Supplies		11/25/2013	14400
		KCD4MXXCNA9R	On Hand	0	LJM Machining Supplies		11/25/2013	14400
		KCD4MXWCNA73	On Hand	0	LJM Machining Supplies		11/25/2013	14400
		KCD4MY3CNAC7	On Hand	0	LJM Machining Supplies		11/25/2013	14400



*Quick Tip – The results are as follow:*

*RYG – Whether or not the item is in the Red, Yellow, Green state.*

*Item Number*

*Card ID*

*Card State*

*Card Cycle Number*

*Default Supplier*

*Location Code*

*Last Received Time*

*Card Quantity*



*Tool Tip – To look at how well you are using the FIFO process, look at the number of cycles for each card. If the number of cycles is in close proximity to each other, the FIFO is working. If you have cards that are not cycling, the FIFO is not working as intended.*

## Cycle Time Report



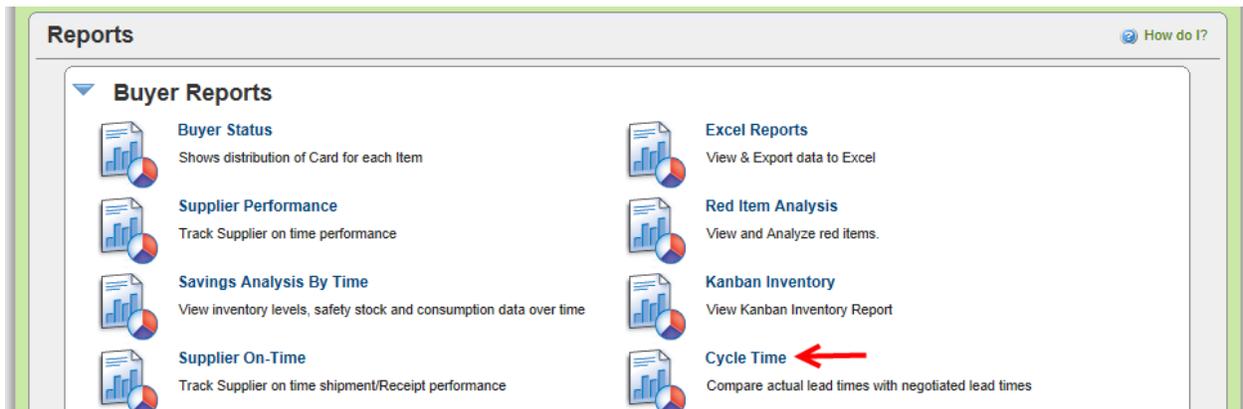
**Quick Tip** – This report compares the “Actual Lead Time” set in Ultriva with the “Supplier Manufacturing Lead Time and Transit Time”.  
Suggestions will be provided if the “Lead Time” and/or “Transit Time” needs to be analyzed further.

It will allow drilling down to the “Card” level to see if all of the cards are cycled at the same rate.

To navigate to the “Cycle Time” report, click on “Reports”



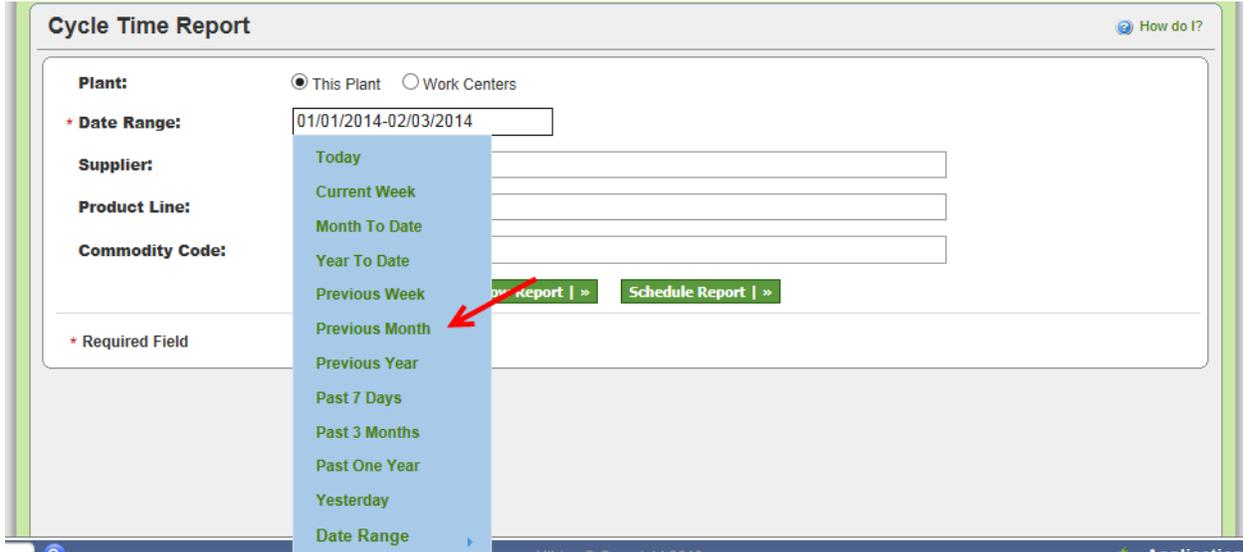
Click on “Cycle Time”



Select a “Plant Option” (*Plant, External –Work Centers, Internal*)



Click in the “Date Range” field and a **dropdown list** appears. Select a “Date Range” option.

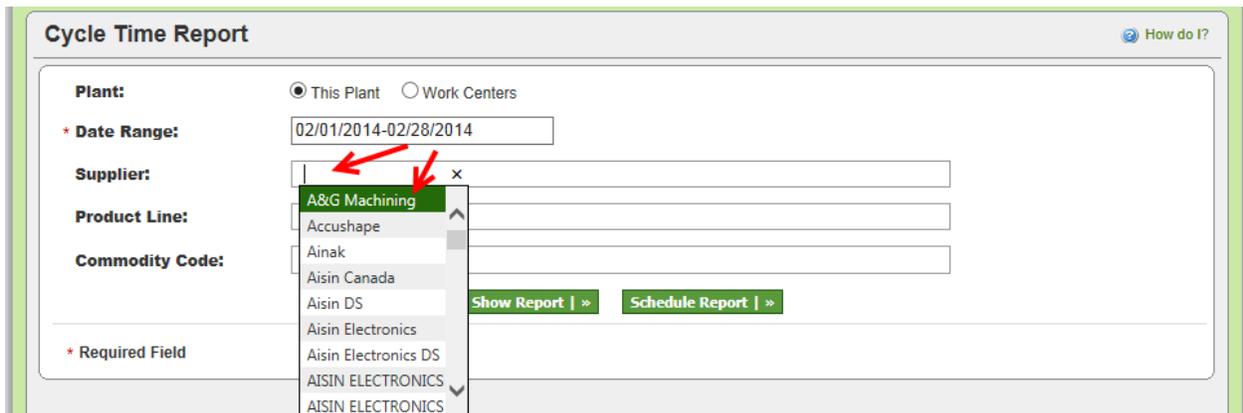


The screenshot shows the 'Cycle Time Report' form. The 'Date Range' field contains '01/01/2014-02/03/2014'. A dropdown menu is open, listing various date range options: Today, Current Week, Month To Date, Year To Date, Previous Week, Previous Month, Previous Year, Past 7 Days, Past 3 Months, Past One Year, Yesterday, and Date Range. A red arrow points to the 'Previous Month' option. Below the dropdown are 'Show Report | »' and 'Schedule Report | »' buttons.



*Quick Tip – Filtering by “Supplier, Product Line, Commodity Code” are optional. For this example we will filter by a “Supplier”.*

The “Date Range” appears. Click in the “Suppliers” field and **press on the spacebar**. A **dropdown list** appears, click on the “Supplier”.



The screenshot shows the 'Cycle Time Report' form. The 'Date Range' field now contains '02/01/2014-02/28/2014'. The 'Supplier' field is empty, and a dropdown menu is open, listing various suppliers: A&G Machining, Accushape, Ainak, Aisin Canada, Aisin DS, Aisin Electronics, Aisin Electronics DS, AISIN ELECTRONICS, and AISIN ELECTRONICS. A red arrow points to the 'A&G Machining' option. Below the dropdown are 'Show Report | »' and 'Schedule Report | »' buttons.

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

**Cycle Time Report** How do I?

**Plant:**  This Plant  Work Centers

**\* Date Range:** 02/01/2014-02/28/2014

**Supplier:** A&G Machining X

**Product Line:**

**Commodity Code:**

\* Required Field

The “Report” appears.

**Cycle Time Details by Item** Views How do I?

Plant: TBJ, Supplier: Selected, Date Range: 02/01/2014-02/28/2014, Product Line: All, Commodity Code: All Change Filter

Item ▲	Plant ▼	Lead Time(in days) ▼	Transit Time(in days) ▼	Avg. Lead Time(in days) ▼	Avg. Transit Time (in days) ▼	Cycles ▼	STDDEV ▼	Suggestion ▼
24680	TBJ	1	1	2.6608	4.7471	25	3.24	
24681	TBJ	1	1	3.1052	3.2544	68	3.48	

Sorted by: Item 1 to 2 of 2



**Quick Tip – The results are as follows:**

- Actual Lead Time entered into Ultriva*
- Actual Transit Time entered into Ultriva*
- Average Lead Time from the Supplier*
- Average Transit Time*
- Cycles*
- STDDEV*



**Tool Tip – If a “Yellow” triangle appears, hover the mouse over the triangle for a suggestion on what to do.**

**This is a key report for streamlining your inventory levels.**

**When analyzing the actual times entered into the system vs. the average times, you will have much success when you can tweak the actual time to what the average time has been. The more accurate the times are in Ultriva the more accurate the Kanban process will run.**

To **drill down** to the “Card ID” level, **click** on a **part number**.

**Cycle Time Details by Item** Views How do I?

Plant: TBJ, Supplier: Selected, Date Range: 02/01/2014-02/28/2014, Product LineAll, Commodity CodeAll Change Filter

Item ▲	Plant ▼	Lead Time(in days) ▼	Transit Time(in days) ▼	Avg. Lead Time(in days) ▼	Avg. Transit Time (in days) ▼	Cycles ▼	STDDEV ▼	Suggestion
24680	TBJ	1	1	2.6608	4.7471	25	3.24	
24681	TBJ	1	1	3.1052	3.2544	68	3.48	

Sorted by: Item 1 to 2 of 2

The “Card ID(s)” appear. Analyze the “Card ID, Cycle No.” to see if it is uniform across all cycles or that some outliers are tilting the average.

**Cycle Time Details By Card ID** How do I?

Item No: 24680, Date Range: 02/01/2014-02/28/2014 Change Filter | Back to Summary

Card ID ▲	Avg. Cycle Time(in days) ▼	Avg. Lead Time (in days) ▼	Avg. Transit Time (in days) ▼	Cycles ▼
KCD4MV6CNAP8	11.2314	1.2160	10.0154	1
KCD4MV7CNAGS	2.9931	2.4485	0.5446	2
KCD4MV8CNAEP	11.2314	1.2160	10.0154	1
KCD4MV9CNARJ	10.0331	4.4383	5.5947	2
KCD4MVACNAN5	10.0331	4.4383	5.5947	2
KCD4MVDCNAPK	10.0195	0.8358	9.1837	1
KCD4MVECNAGN	10.0195	0.8358	9.1837	1
KCD4MVFCNAKU	10.0195	0.8358	9.1837	1



**Quick Tip** – The results are as follows for each Card ID set for an item:

**Card ID**

*Average Cycle Time in days*

*Average Lead Time in days*

*Average Transit Time in days*

*The cycles on the card*



**Tool Tip** – This helps analyze any questions on the previous screen but at the “Card ID” level. Look for any outliers that may affect the averages.