



Ultriva Version 8.2

Release Notes

By Upland Software

Version 1.0

Ultriva 8.2 Release Notes

Enhancements:

1. Shipping Rules Enhancement:

If, when using a shipping rule, the calculated ship date falls on a non-working holiday for the supplier, it may be set to fall instead on the next available ship date based on the shipping rule.

Config Flag: Admin > Business unit configuration > Release tab.

The screenshot shows the Ultriva 8.2 QA Test Site configuration page for TCEK-Ram. The page displays a table of configuration flags with their names and values. The flag 'Adjust calculated Required Ship Date to next Shipping Rule calculated day:' is highlighted with a blue box and is currently set to 'ON'. Other flags include 'Approvals for Virtual Kanban Release:' (OFF), 'Aggregate on hand inventory from internal Item number to purchase Item number for Virtual Kanban Release:' (OFF), 'Consumption Scan for Forecast Items:' (ON), 'Release Planned Orders by Lotsize for Forecast Items:' (ON), 'Reset card location to item location on release:' (OFF), 'Allow spike order for forecast items:' (ON), and 'Allow spike orders to wait at runline:' (OFF). The 'Show unit price in spike order entry screen:' flag is set to 'None'. A legend at the bottom indicates that a red asterisk denotes a required field.

Name	Value
Approvals for Virtual Kanban Release: *	OFF
Aggregate on hand inventory from internal Item number to purchase Item number for Virtual Kanban Release: *	OFF
Consumption Scan for Forecast Items: *	ON
Release Planned Orders by Lotsize for Forecast Items: *	ON
Reset card location to item location on release: *	OFF
Allow spike order for forecast items: *	ON
Allow spike orders to wait at runline:	OFF
Show unit price in spike order entry screen: *	None
Adjust calculated Required Ship Date to next Shipping Rule calculated day: *	ON

*Required field

The default value is 'OFF'. When OFF, if the calculated Required Ship Date falls on a holiday, Ultriva will set the ship date to be the next Calendar working day.

If the value is 'ON' and the Shipping rule and Calculated Required Ship Date falls on a holiday, Ultriva moves the Required Ship Date to the next calculated shipping rule day.

2. Item Configuration to Force Attachments on Ship screen:

On Item Create/Edit pages, a new setting was added to enforce attachments when shipping cards. When the user clicks on this setting, a list of required documents will be displayed on the right. The user must select at least one required attachment.

upland Ultriva 8.2 QA Test Site

Admin > Item

Modify Item ITReqdShipDate

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

Item Information

*Item No: ITReqdShipDate
 Revision No:
 Location Code:
 *Price Per UOM: 0
 *Re-order cards when: Open Box (First unit consumed)
 Serial Controlled:
 *Description: Reqd ship date cal
 *Handling Time: 2 (in days)
 ABC Code:
 *Category: Kanban
 Lot Number Tracking: None
 Certification Controlled: None

Coordinator Information

*Item: [buyer:xc]
 NCR Owner: [appuser:xc]
 Purchase: [appuser:xc]
 Additional Quality User:

Usage Information

*Usage Per Day: 100
 *Quantity On Card: 100
 *Safety Time: 2 (in days)

Group Information

Product Line: None
 Commodity Code: None

Tolerance Information

*Ship Quantity: 0
 *Receive Quantity: 0

Card Cycle Settings

Wait at dock for inspection
 Wait for Put Away
 Force Tolerance
 Force Packing Slip No
 Force Attachments when shipping cards
 Consignment Item
 Do not include this item for Auto Resize

Temporary card will be created for Partial Shipment - No

Required Documents

Certificate of Conformance
 BOL
 Invoice
 Material Certification
 Packing Slip

Ship Screen behavior:

When attaching notes, user will see the required documents configured for the item.

29/Mar/17

29/Mar/17

Attach notes for card:KCDGN2RTRAYH

Priority: Low Medium High

Notes: -- Select Notes --

Attach files:

Required Documents:

- Certificate of Conformance
- BOL
- Invoice
- Material Certification
- Packing Slip

Required Documents:

- BOL
- Invoice
- Packing Slip

Apply this notes and priority to all selected cards

Apply Notes Ship Cancel

30/Mar/17

If the user tries to Ship Cards without attaching documents, they will get an error specifying which cards are missing documents.

The screenshot shows a table with columns: Card ID, Supplier Item No., Plant Item No., Release Date, Reqd Ship, Reqd Receive, Manufacture Date, and Expiration Date. Several rows are highlighted in blue, and their checkboxes are checked. A modal dialog box titled "8.2 QA Test Site" is overlaid on the table, containing the following text:

The following cards are missing required documents. Please attach them before shipping.

- KCDGN2RTRAYH
- KCDGN2TTRA2M
- KCDGN2UTRAVQ
- KCDGN2WTRAZX
- KCDGN2XTRAXD

An "Ok" button is visible at the bottom right of the dialog box.

3. Enable HAZMAT/Shelf Life Controlled items for Plant (Business Unit Config)

HAZMAT and Shelf Life can be designated for items once the configuration has been enabled ('On'). Go to Admin > Business unit configuration > Custom Tab > "Plant manages HAZMAT and/or Shelf Life controlled items".

upland Ultriva 8.2 QA Test Site

Admin

Plant Configuration for: TCEK-Ram

General Card **Custom** Integration Pick List Print QMS Receive Release RFQ Scan Ship Work Order

Configuration Settings

Name	Value
Default Buyer for PO Grouping:	
PO Grouping options:	One PO per item, one line per card
Inspection reject behavior:	Classic
Override Pick Card Quantity:	Yes
Skip lot plan name:	
MRP gross requirements increase percentage by:	0
Virtual Kanban process match excess ERP inventory in Ultriva:	Single Card
Append supplier code to supplier name in dropdown lists:	ON
Update original required dates on supplier reschedule on accept:	ON
Spike Order Entry/insert processed entry when no entry is made:	ON
Plant manages HAZMAT and/or Shelf Life controlled items:	ON
Supplier reschedule on accept of new order:	Needs Approval
Show MRP Gross Requirements for suppliers:	ON
MRP Forecast:	Planned Orders , Gross Requirement...

When set to ON, additional configurations are available to display special handling instructions for HAZMAT items as well as Manufacture and Expiration dates where required

Item Configuration Changes:

If the Plant level setting for HAZMAT/Shelf Life Controlled items is ON, when creating or editing an item there will be two new settings: "Hazardous Material (HAZMAT)" and "Shelf Life Controlled."

Admin > Item

Modify Item ITReqdShipDate

Base Information Supplier Additional Information UOM Information Notes Custom Field List

Item information

*Item No: ITReqdShipDate *Description: Reqd ship date cal

Revision No: Handling Time: 2 (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

Serial Controlled: Certification Controlled: None

Coordinator information

*Item: buyerx Purchase: appuserx

NCR Owner: appuserx Additional Quality User:

Usage information

*Usage Per Day: 100 *Safety Time: 2 (in days)

*Quantity On Card: 100

Group information

Product Line: None Commodity Code: None

Tolerance information

*Ship Quantity: 0 *Receive Quantity: 0

Card Cycle Settings

Wait at dock for inspection
 Wait for Put Away
 Force Tolerance
 Force Packing Slip No
 Force Attachments when shipping cards
 Hazardous Material (HAZMAT)
 Shelf Life Controlled
 Consignment Item
 Do not include this item for Auto Resize

Temporary card will be created for Partial Shipments - No

Required Documents

Certificate of Conformance
 BOL
 Invoice
 Material Certification
 Packing Slip

If the item is marked as Shelf Life Controlled, two new options will be displayed to force Manufacture/Expiration date when shipping cards.

The screenshot shows two sections: 'Card Cycle Settings' and 'Required Documents'. In the 'Card Cycle Settings' section, the following options are listed with checkboxes: 'Wait at dock for Inspection', 'Wait for Put Away', 'Force Tolerance', 'Force Packing Slip No', 'Force Attachments when shipping cards', 'Hazardous Material (HAZMAT)', 'Shelf Life Controlled', 'Force Manufacture Date at ship', 'Force Expiration Date at ship', 'Consignment Item', and 'Do not include this item for Auto Resize'. The 'Shelf Life Controlled' option and its two sub-options are highlighted with a red box. In the 'Required Documents' section, the following options are listed with checkboxes: 'Certificate of Conformance', 'BOL', 'MSDS', 'Invoice', 'Material Certification', and 'Packing Slip'.

When Manufacture/Expiration date(s) are required and one card is shipped with empty date or invalid date, an error will be displayed in the Ship Cards Result screen. (Similar error for Expiration Date).

The screenshot shows the 'Ship Cards Results' screen. At the top, there is a breadcrumb trail: 'Admin > Actions > Ship'. Below this, the title 'Ship Cards Results' is displayed. A red error message reads: 'Following cards failed'. Below the error message is a table with the following data:

Card ID	Supplier Item No.	Description
KCDGN2RTRAYH	ITReqdShipDate	Manufacture Date should not be empty at: eBots.LeanSuite.Models.EboActionHelper.DoCardAction(String gridID)

Pick List behavior for Shelf Life Controlled items:

Work Center 1 receives goods from external supplier where external supplier has provided the Expiration date on Ship. Work Center 1 supplies these orders as internal supplier to Work Center 2 using Picklist -> PickAndShip scan.

On Pick List creation, pick cards are sorted by Expiration date – earliest go first. Cards with expiration date in the past are not considered on Pick list creation.

On PickAndShip scan, if the On-Hand card has an Expiration Date less than the current date, it cannot be picked.

4. Resequence Production Orders - Added validation so that held or started jobs cannot be resequenced.

Reschedule started job:

The screenshot shows the 'Resequence Production Orders' window. A table lists production orders with columns for RYG, Card ID, Cycle No, Item, Description, Operation Name, Machine, Plant, and Card Qty. A modal dialog box titled '8.2 QA Test Site' is displayed over the table, containing the message: 'Only not started jobs can be reschedule' and a list item '• KCDGVXVTRAW4'. An 'Ok' button is visible in the bottom right of the dialog.

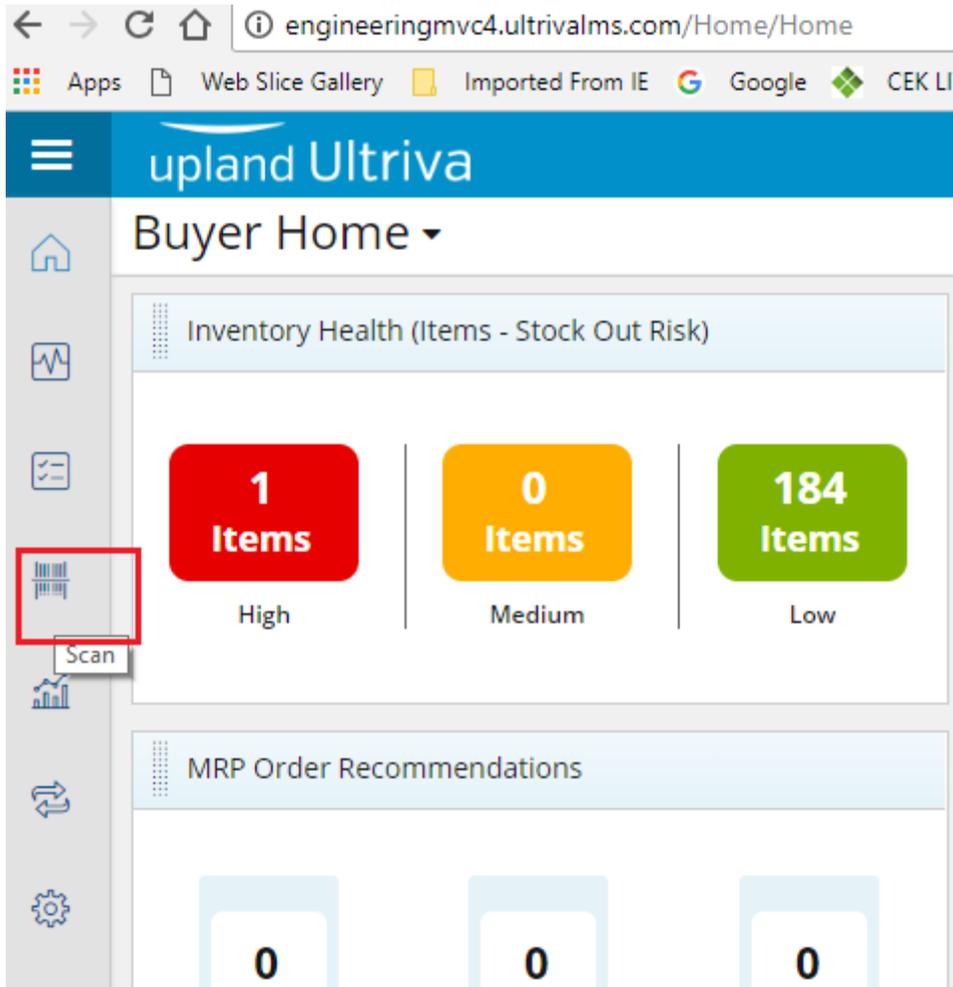
RYG	Card ID	Cycle No	Item	Description	Operation Name	Machine	Plant	Card Qty
	KCDGVXXTRA7K	1	IT150518	Test PS	-Accepted-	Machine1	WCLine1	100
<input checked="" type="checkbox"/>	KCDGVXVTRAW4	1	IT150518	Test PS	-Accepted-	Machine1	WCLine1	100
	KCDGVXWTRA99	1	IT150518	Test PS	-Accepted-	Machine1	WCLine1	100
	KCDGWFVTRAG6	1	IT250518	Test It	Operation2	Machine2	WCLine1	125
	KCDGWG2TRA32	1	IT250518	Test It	Operation1 (Completed)	Machine1	WCLine1	125
	KCDGWG3TRAU7	1	IT250518	Test It	Operation1 (Completed)	Machine1	WCLine1	125
	KCDGN35TRAG7	1	ITPickList	Test Pick List	-Accepted-	Machine1	WCLine1	100
	KCDGVXGTRAV5	1	IT140518	Test	Operation1	Machine1	WCLine1	100

Reset:

The screenshot shows the 'Resequence Production Orders' window with a toolbar containing buttons for 'Reschedule', 'Reset Job', 'Paste Before', 'Paste After', 'Hot Order', and 'Bookmark'. A modal dialog box titled '8.2 QA Test Site' is displayed, containing the message: 'Following Job(s) are not on hold state, only Held Jobs can be Reset.' and a list item '• KCDGWFVTRAG6'. An 'Ok' button is visible in the bottom right of the dialog.

RYG	Card ID	Cycle No	Item	Description	Operation Name	Machine	Plant	Card Qty	Completed Qty
	KCDGVXXTRA7K	1	IT150518	Test PS	-Accepted-	Machine1	WCLine1	100	0
	KCDGVXVTRAW4	1	IT150518	Test PS	-Accepted-	Machine1	WCLine1	100	0
<input checked="" type="checkbox"/>	KCDGWFVTRAG6	1	IT250518	Test It	Operation2	Machine2	WCLine1	125	0
	KCDGWG2TRA32	1	IT250518	Test It	Operation1 (Completed)	Machine1	WCLine1	125	0
	KCDGWG3TRAU7	1	IT250518	Test It	Operation1 (Completed)	Machine1	WCLine1	125	0

5. New icon used for "Scan".



6. On Material Status, Receipts Past Due, Orders Not Acknowledged, etc., the sort bar and the next page is now frozen on the screen when scrolling.

Business Unit: Plant One Application: Application (Plant)

Buyer Material Status

Sorted by: Item, Usage Per Day, RYG Status Viewing 1 to 50 of 91 Page 1 of 2

RYG	Item	Units on hand	Usage Per Day	Daily usage last 15 days	Daily usage last 90 days	Days of material on hand	Next delivery due	Units expected	Projected stock-out	Past due orders	Past Due	On Hand Trend
	ULT-021-0163-00	0	517.9778	517.9778	37.8	0	02/24/2017	6,804			0	
	ULT-021-0165-00	0	98	98	98	0	-	0			0	
	ULT-021-0180-00	27216	1,815	1,815	151.2	14,9950	10/12/2016	54,432			0	
	ULT-035-0322-00	8400	19,7385	19,7385	19,7385	425,5643	05/06/2015	1,200			1	
	ULT-035-0322-01	5400	21,0923	21,0923	21,0923	256,0176	05/06/2015	600			1	
	ULT-041-0469-99	0	20,4444	20,4444	20,4444	0	04/06/2017	1,380			1	
	ULT-041-0629-79	0	130	130	130	0	-	0			0	
	ULT-041-0641-79	0	12	12	12	0	-	0			0	
	ULT-047-2051-00	0	20	20	20	0	03/29/2017	1,620			1	
	ULT-047-2051-01	0	16	16	16	0	03/29/2017	1,260			1	
	ULT-047-5028-06	0	361	361	361	0	03/29/2017	1,080			1	
	ULT-047-5033-18	0	698	698	698	0	03/29/2017	1,980			1	
	ULT-047-5033-19	0	574	574	574	0	03/29/2017	1,620			1	
	ULT-047-5042-06	0	1,223	1,223	1,223	0	03/29/2017	3,600			1	
	ULT-047-5047-14	0	60	60	60	0	03/29/2017	1,200			1	

7. Moved My Business Unit and My Business Unit config to Admin section, and removed the word “MY” as it was misleading (sounds like you are making the change only for your Account).
8. Label data view changes were made so that the following can be printed on a label:
 - a. Manufacture Date: Certification Request Date
 - b. Expiration Date: Certification Response Date
9. Created RFID Ship Transaction.
10. Added card state field to Supplier recall cards list screen.

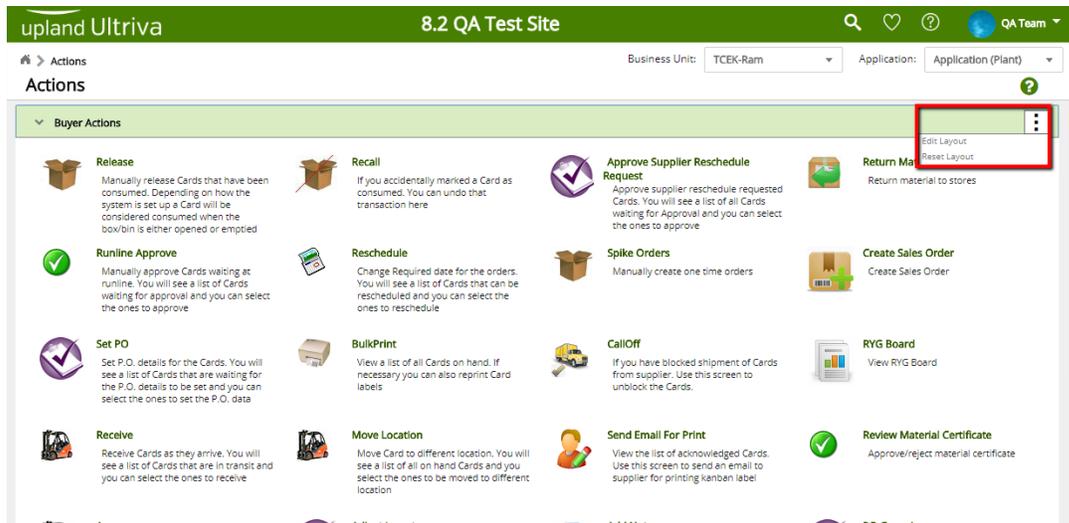
Recall Cards List

Sorted by: Supplier Item No., Card ID

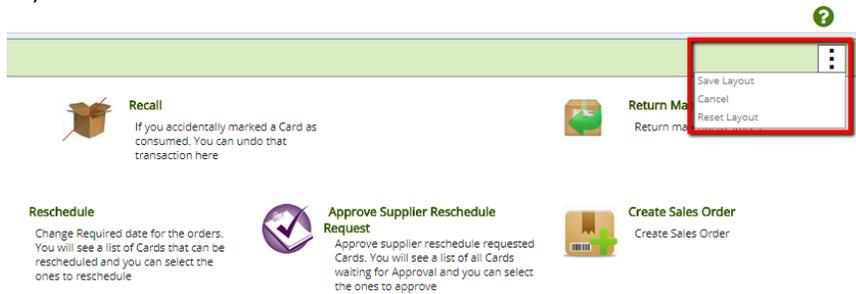
	Card ID ↑	Supplier Item No. ↑	Release Date ↓	Req'd Ship ↑	Ship Date ↓	Req'd Receive ↓	Card Qty	Ship Qty	PO #	PO Line #	Release #	Release Line #	Card State
<input type="checkbox"/>	KCDEQMSTRAQM	00000ABC	06/Nov/12	25/Aug/17	01/Sep/17	29/Aug/17	34	34					At Consolidator
<input type="checkbox"/>	KCDGDEWTRA46	A715234	19/Oct/16	29/Mar/17	31/Oct/17	30/Mar/17	45	45					In Transit
<input type="checkbox"/>	KCDGDEXTRA2L	A715234	19/Oct/16	29/Mar/17	31/Oct/17	30/Mar/17	45	45					In Transit
<input type="checkbox"/>	KCDGFPZYTRAXB	A715234	29/May/17	19/Jun/17	19/Feb/18	20/Jun/17	100	100					At Consolidator
<input type="checkbox"/>	KCNGNBDTRAU5	Apr3	06/Apr/17	10/Apr/17	06/Apr/17	12/Apr/17	5	5	123				At Consolidator
<input type="checkbox"/>	KCDGNCMTRADT	Apr8V	08/Apr/17	12/Apr/17	08/Apr/17	14/Apr/17	100	100	123				At Consolidator
<input type="checkbox"/>	KCDGNCTRANR	Apr8V	08/Apr/17	12/Apr/17	08/Apr/17	14/Apr/17	100	100	123				At Consolidator
<input type="checkbox"/>	KCDGNCPTRAKV	Apr8V	08/Apr/17	12/Apr/17	08/Apr/17	14/Apr/17	100	100	123				At Consolidator
<input type="checkbox"/>	KCDGNCQTRACY	Apr8V	08/Apr/17	12/Apr/17	08/Apr/17	14/Apr/17	100	100	123				At Consolidator
<input type="checkbox"/>	KCDGUS5TRA8J	AutoReceive	16/Feb/18	19/Feb/18	16/Feb/18	20/Feb/18	50	50					At Consolidator
<input type="checkbox"/>	KCSGR8ATRAHZ	Avag25itv	25/Aug/16	29/Aug/16	15/Aug/17	31/Aug/16	1,000	1,000					In Transit
<input type="checkbox"/>	KCSGEXNTRA89	Avdec2item1	02/Dec/16	06/Dec/16	17/Mar/17	08/Dec/16	25	5					At Consolidator
<input type="checkbox"/>	KCSGMNVTRAZS	Avdec2item1	02/Dec/16	06/Dec/16	17/Mar/17	08/Dec/16	20	2					At Consolidator
<input type="checkbox"/>	KCDGDSVTRAAS	Avocct26item1	26/Oct/16	28/Oct/16	26/Oct/16	31/Oct/16	100	100	PO123				At Consolidator

11. On the Actions, Reports, Scan and Admin screens, the icons can now be reordered.

When you press the menu icon, there are two possible actions: Edit Layout and Reset Layout. When in Edit Layout mode, icons can be dragged to a new location.



When the icons are in the desired location, click on the menu button to Save/Cancel/Reset layout.



If the user wants to apply the layout setting for all plants/work-centers and suppliers in the application they can go to My Preferences to enable “Apply Actions/Reports/Admin layout to all plants/work-centers/supplier”, as described below in Enhancement 13b.

12. The following Custom Layout Settings were added:

- a. Apply home layout to all plants/workcenters/suppliers: ON/OFF

When creating a custom layout on the home screen, if you are associated with other Business units you can apply the same Cards layout for all your Business units.

- b. Apply Actions/Reports/Admin layout to all plants/workcenters/suppliers: ON/OFF

If you created a custom layout on the Actions/Reports/Admin and you are associated with other Business units, you can apply the same layout for all your Business units.

Click on your username > My Account > My Preferences

The screenshot shows the 'My Preferences' page in the Ultriva system. The page is titled '8.2 QA Test Site' and has a breadcrumb trail: 'Item > Admin > My Account'. The 'Business Unit' is set to 'TCEK-Ram' and the 'Application' is 'Application (Plant)'. The 'My Preferences' section is divided into several categories:

- Login Preference:** 'After Login Go To' is set to 'Default', 'My Default Home Page' is 'Buyer Home', and 'My Default Login Business Unit' is 'TCEK-Ram'.
- Style Preference:** 'My Theme' is 'Green' and 'My Bullet Graph Theme' is 'RYG'.
- Paging Preference:** '*Show:' is set to '100 records per page' and 'Short Date Format' is 'Short Date With Literal Month |'.
- Layout Preferences:** Two toggle switches are present, both set to 'OFF':
 - 'Apply home layout to all plants/workcenters/suppliers' (OFF)
 - 'Apply Actions/Reports/Admin layout to all plants/workcenters/suppliers' (OFF)

At the bottom right, there are 'Save' and 'Cancel' buttons. A 'Required field' label is visible at the bottom left of the form area. The footer of the page reads 'Ultriva © Copyright 2016'.

13. **Inspect Item changes:** Added visibility to items marked for inspection on Receive action and on scans.

14. Added new enhanced view for Order Status API.

Bug Fixes

1. Fixed the Last Modified date and user for the Item edit page and the associate supplier page.
2. Fixed Ship by box pop-up. (Was not centered in the screen and screen was grayed out for some users.)
3. Fixed Export and printing MRP Recommendation issue. (When filter was applied exporting all recommendations instead of the filtered list).
4. Fixed issue where user was sometimes forced to print labels on receipt.
5. Duplicate job Supplier PO Release to fix a bug (JobExpSupplierPORelease – SupplierOrderEXP).