Ultriva 9.4 version

Release Notes

By Upland Software

Version 1.0

Ultriva 9.4 Release Notes

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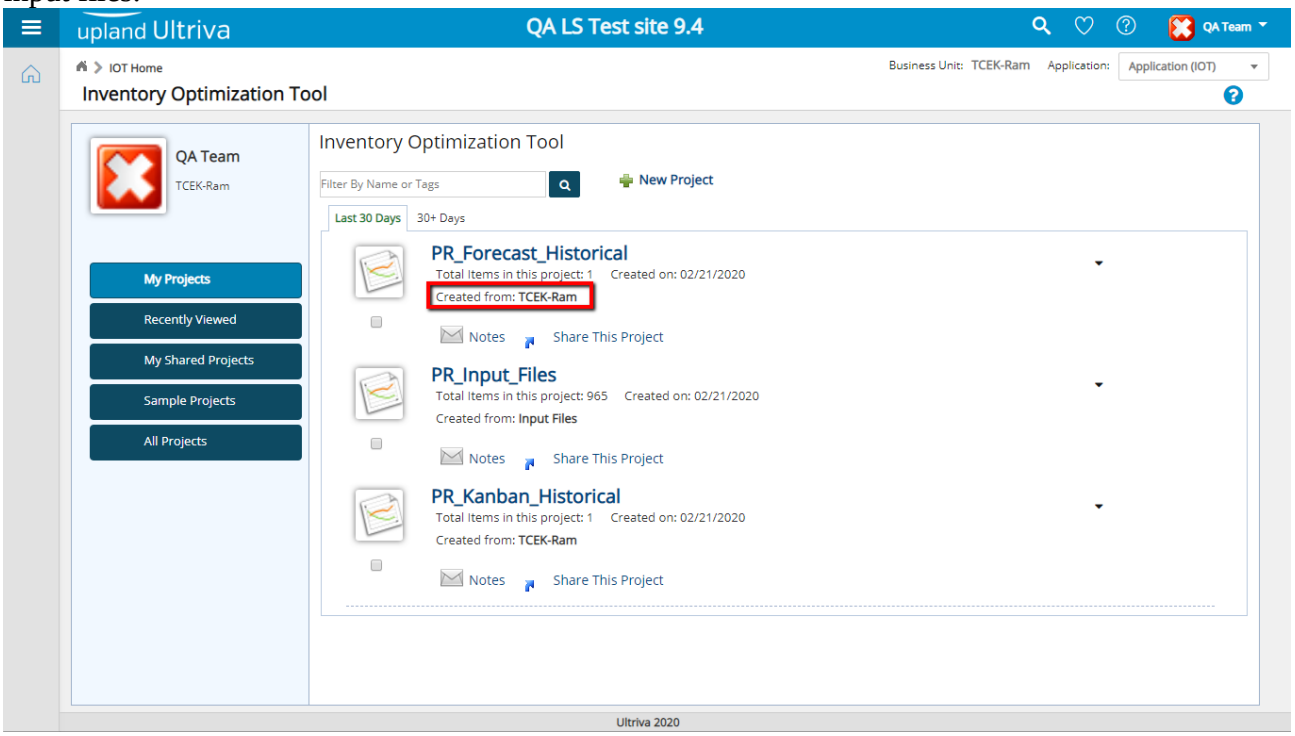
1 Enhancements

1.1 IOT enhancements

a. IOT Home page is specifying if project was created using bus unit data or data provided on input files.



b. IOT share project has been changed to the following logic:
   - If project was created from input files, any active system user could be selected to Share project
   - If project was created from Kanban/Forecast data from specific bus unit, any active user who has access to that bus unit will be available to Share project

   My Shared projects list displays all projects shared with current user.

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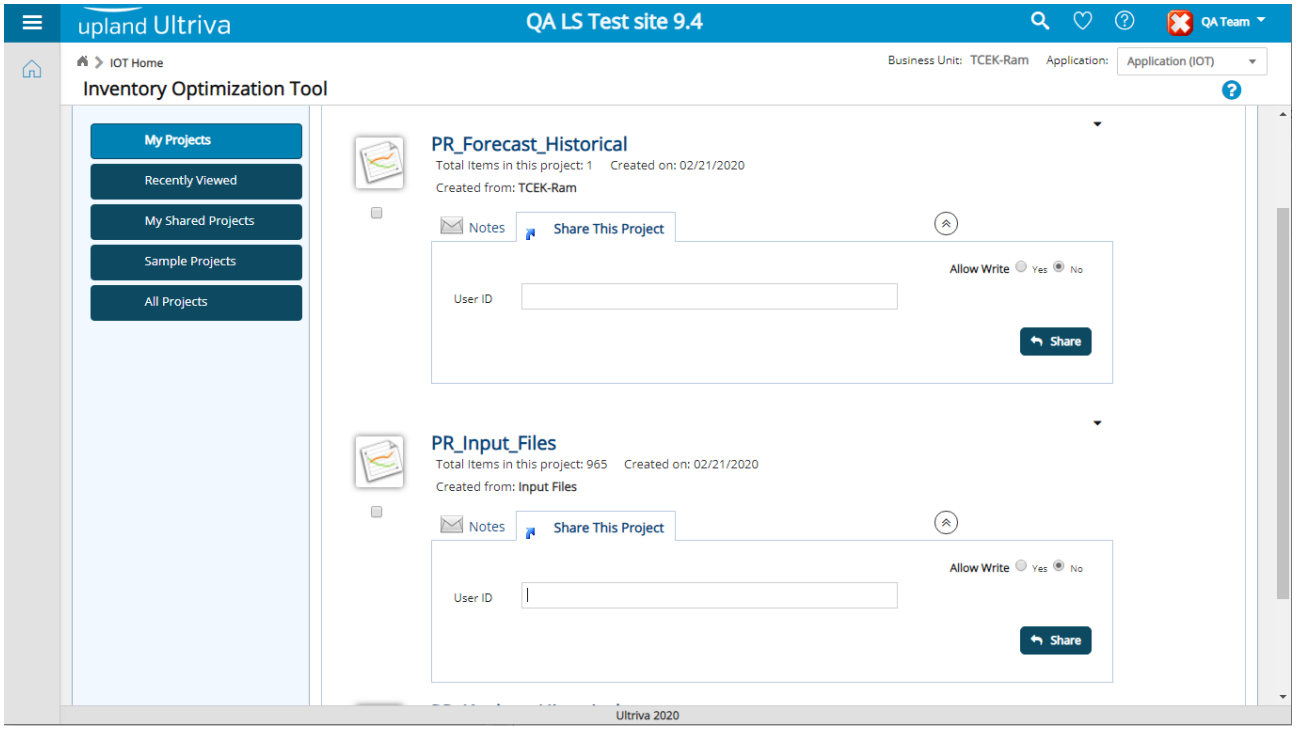

c. New IOT logic:
    a. When Kanban/Forecast project is being created, select the number of days to get data for the project. This number of days is being used to calculate average demand for each item.
    b. If using files, we use the same logic we had before, calculating the number of days according to transactions dates.

d. Lead Time column header on IOT grids was updated to reflect the real meaning where Total Lead Time = Lead Time + Transit Time + Handling Time

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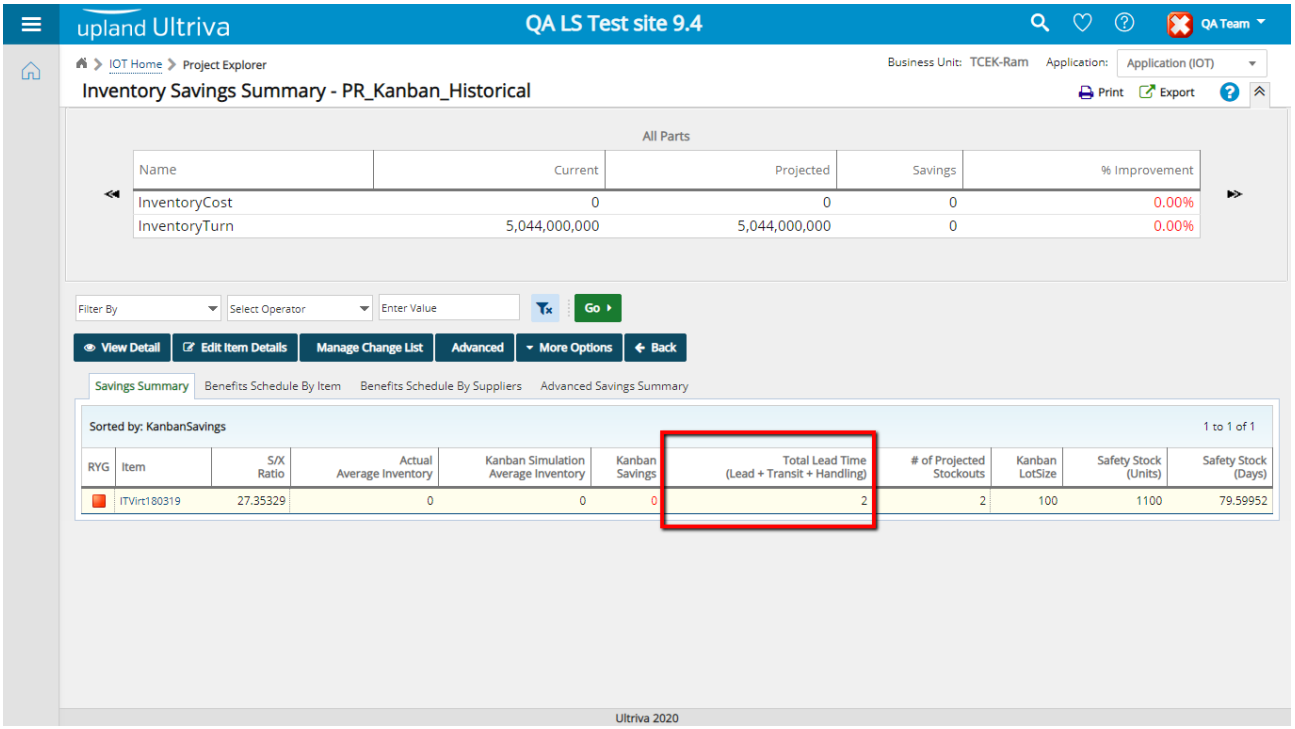

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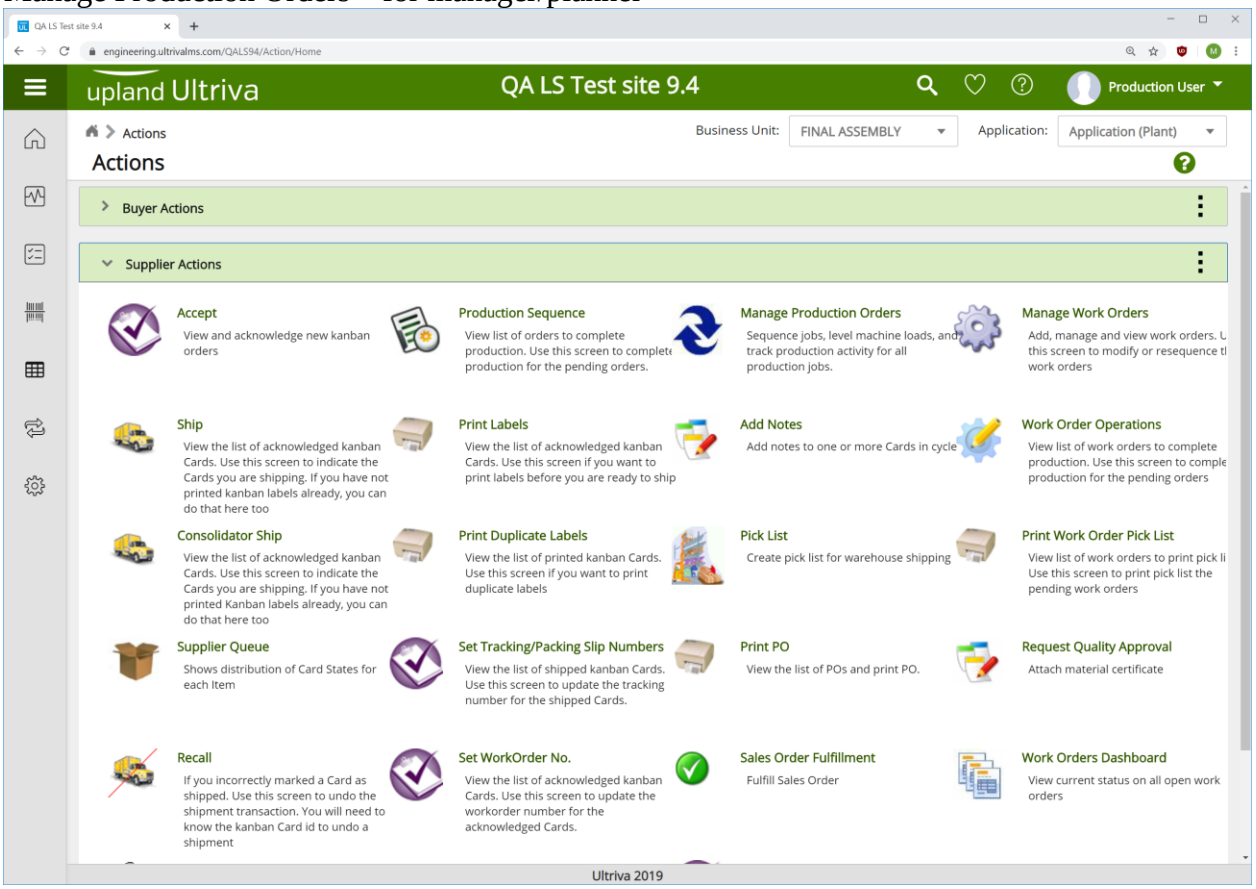
1.2 LFM features - menu items renaming, OEE report and Production Sequence/Manage enhancements

1.2.1 Updated Production Sequence Page

Supplier actions menu:
Production sequence – action for operator to record activities
Manage Production Orders – for manager/planner



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1.2.2 Production sequence, Active Orders tab

This tab shows orders scheduled for the logged in operator.

In the header for each day we show:

Date

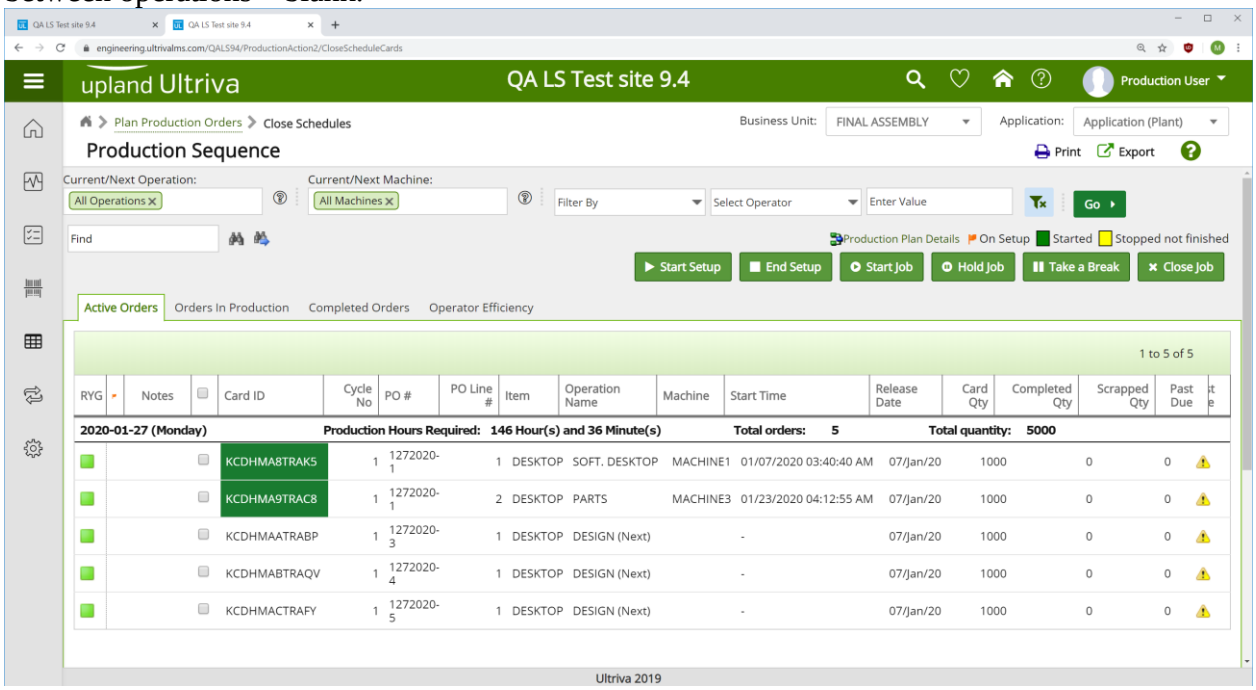
Production Hours Required: **146 Hour(s) and 36 Minute(s)** (this time includes required cycle time, setup time and teardown time based on selected sort criteria. If no operation or machine selected in the filters, we'll show required time for all current and future operations based on pre-assign machines)

Total orders: **5**

Total quantity: **5000**

Operation name – currently running or next scheduled operation.

Machine – for running job current machine job is running on. If job is not started or between operations – blank.



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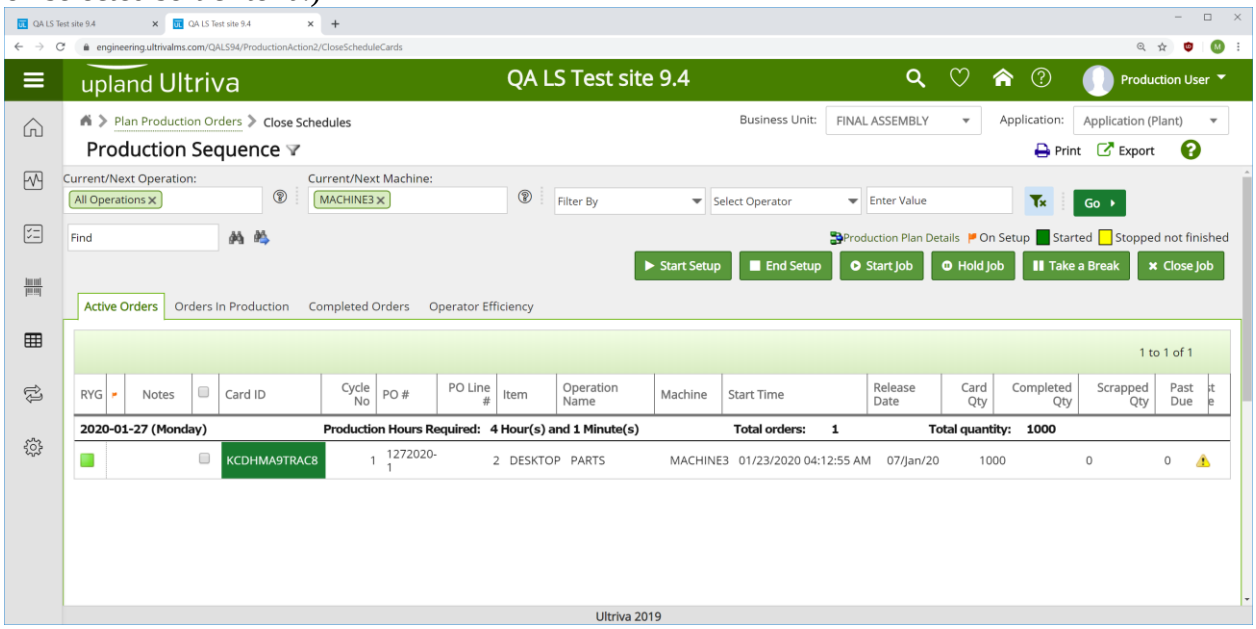
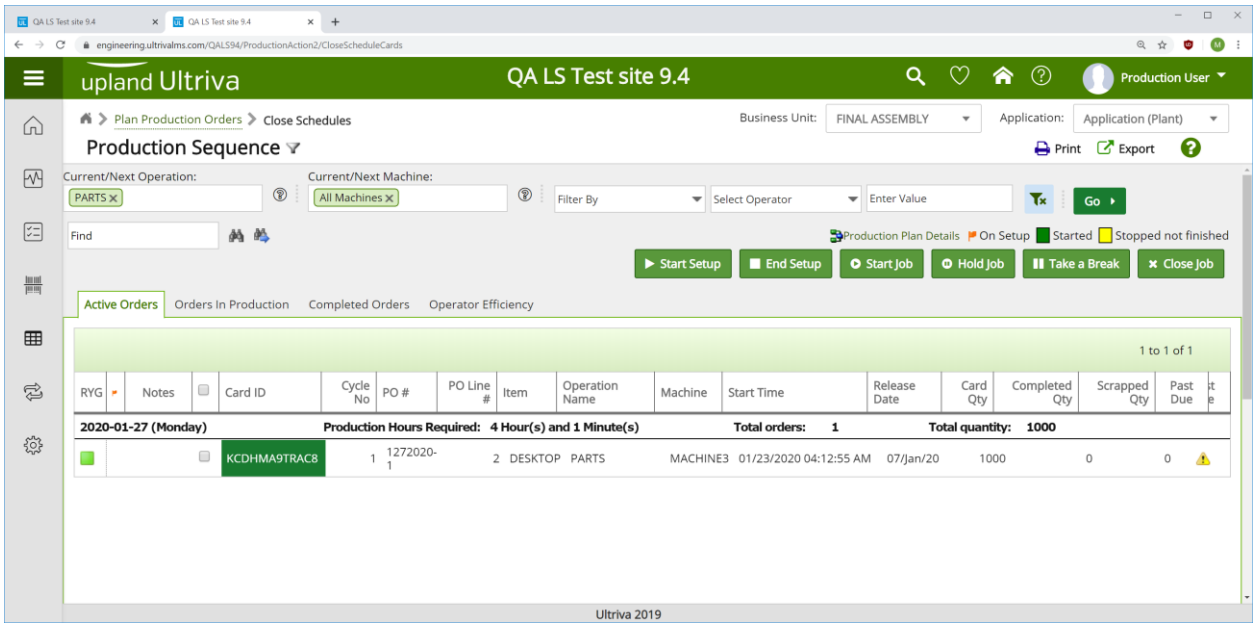
Filtering by Current/Next Operation and/or Current/Next Machine allows user to select narrow set of jobs. **Production Hours Required** will show only time required for selected operation/machine (time includes required cycle time, setup time and teardown time based on selected sort criteria.)





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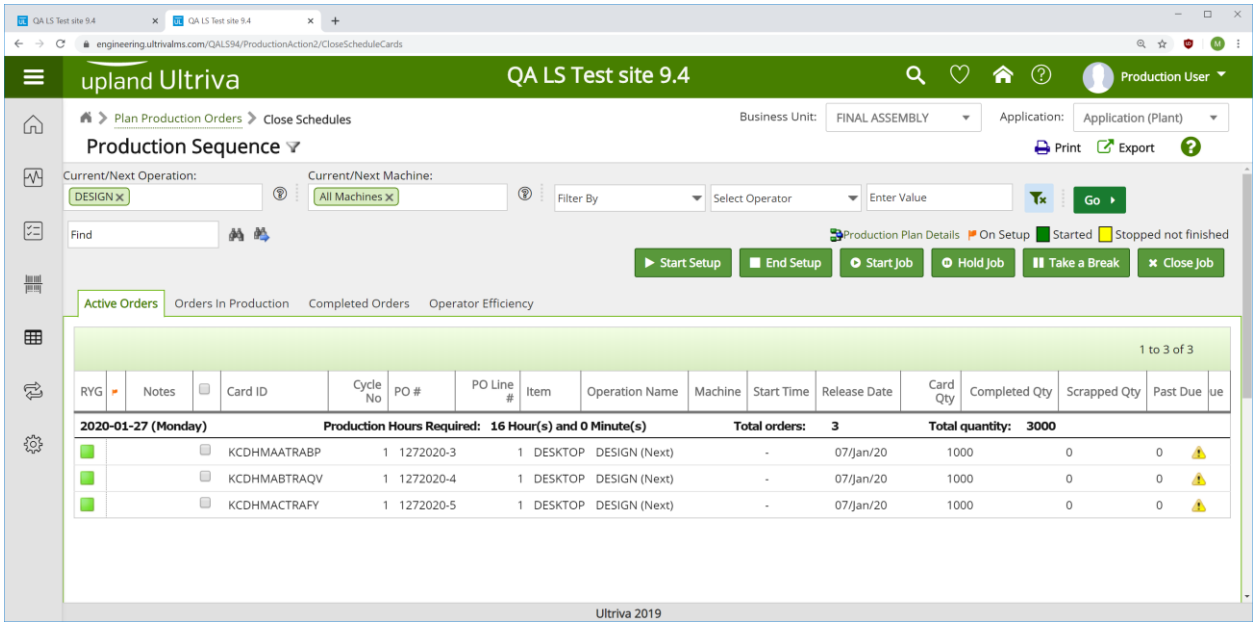
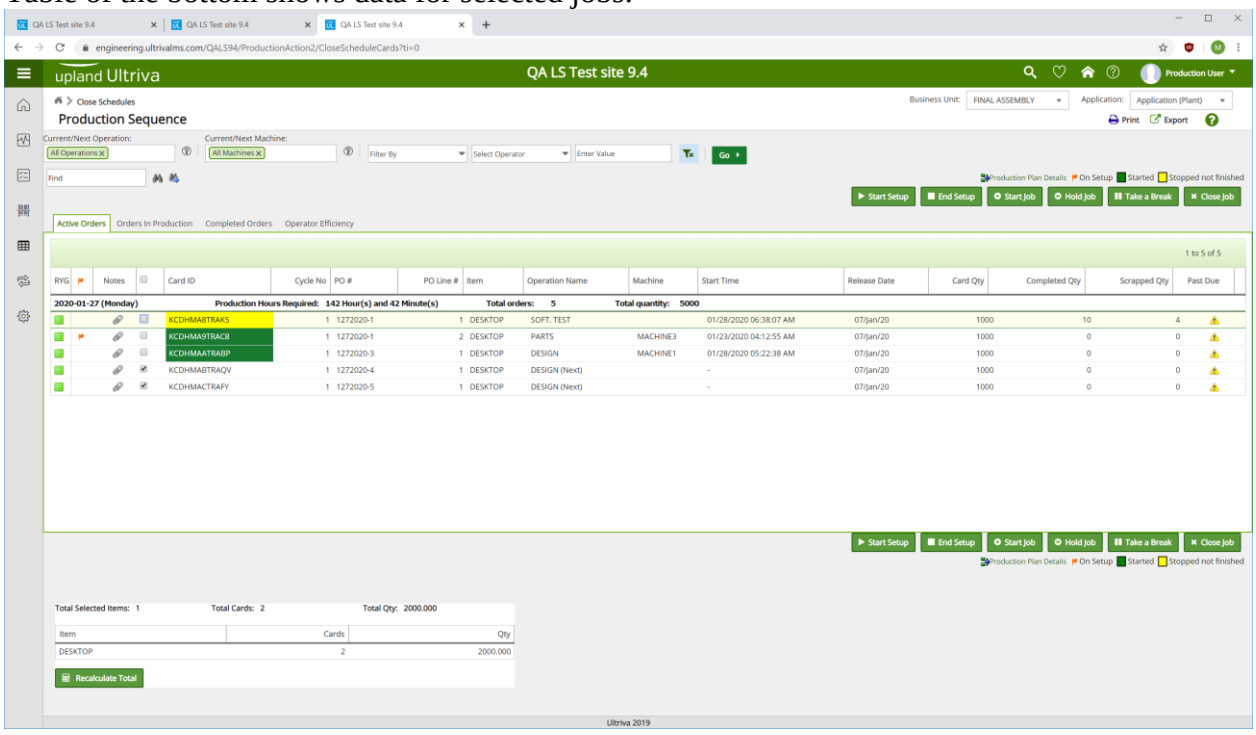


Table of the bottom shows data for selected jobs:



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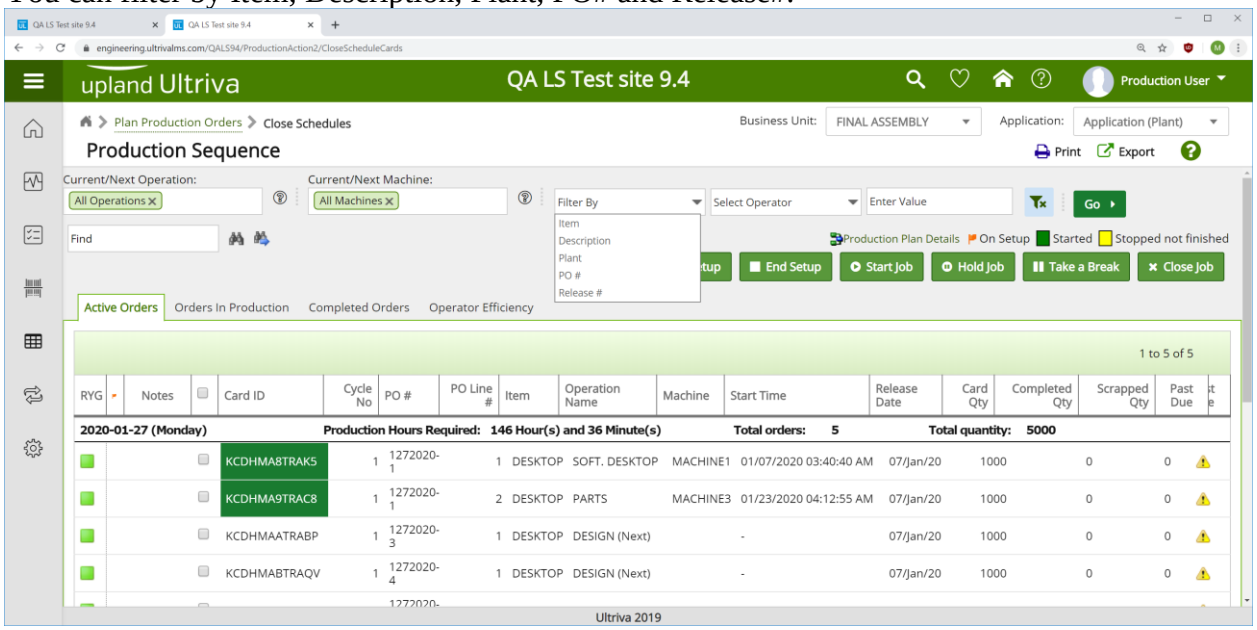
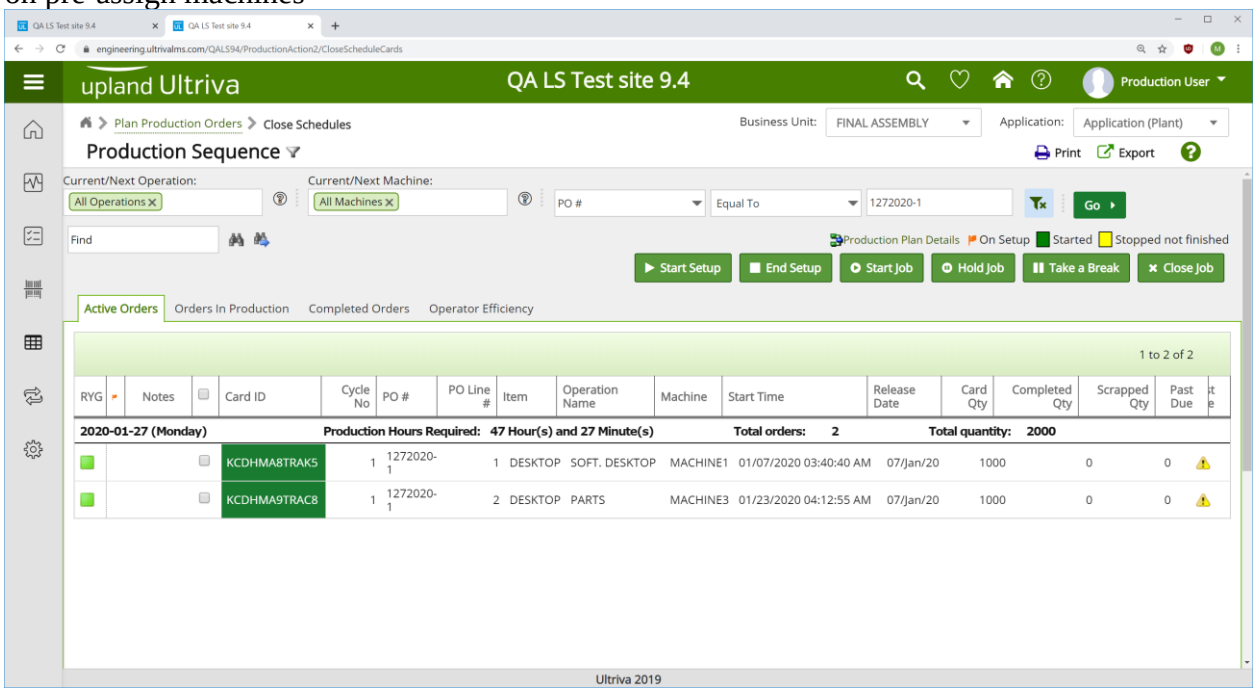
You can filter by Item, Description, Plant, PO# and Release#.



Production Hours Required shows required time for all current and future operations based on pre-assign machines



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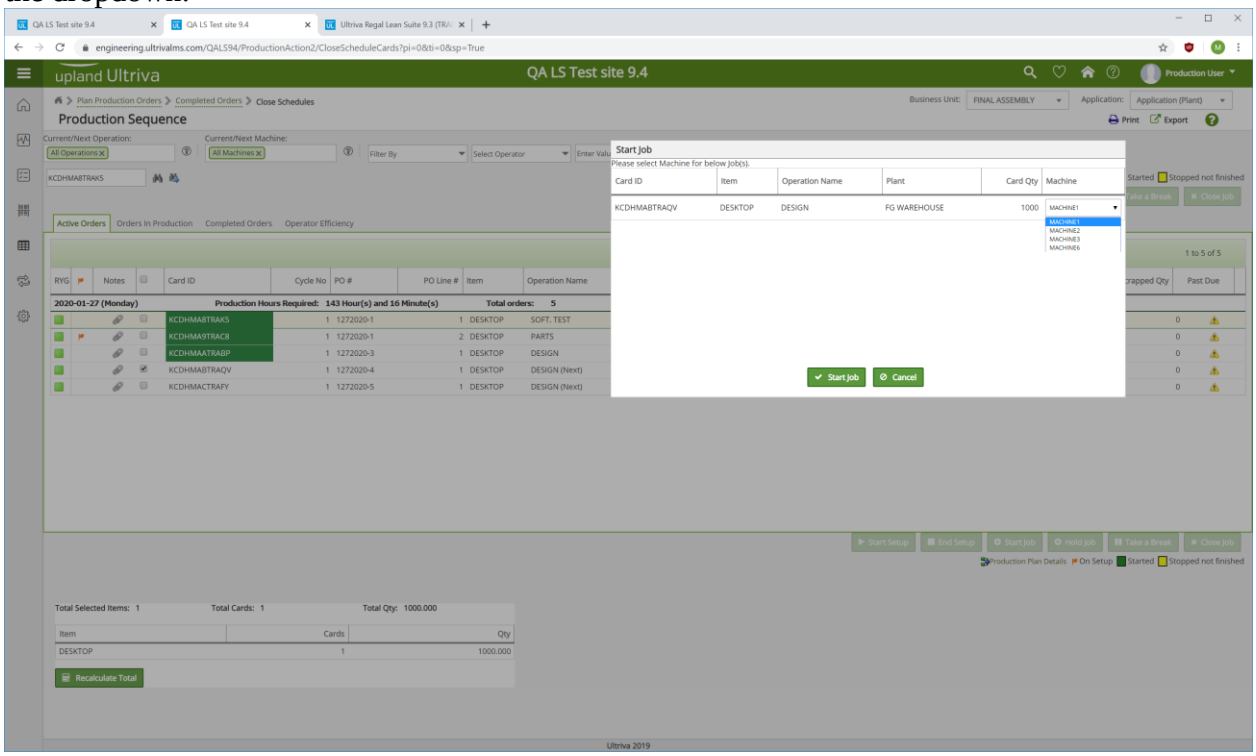
If several machines are assigned for the same operation, on Start Job, the dialog will pop-up and the operator can change the machine. The pre-assigned machine will be pre-selected in the dropdown:



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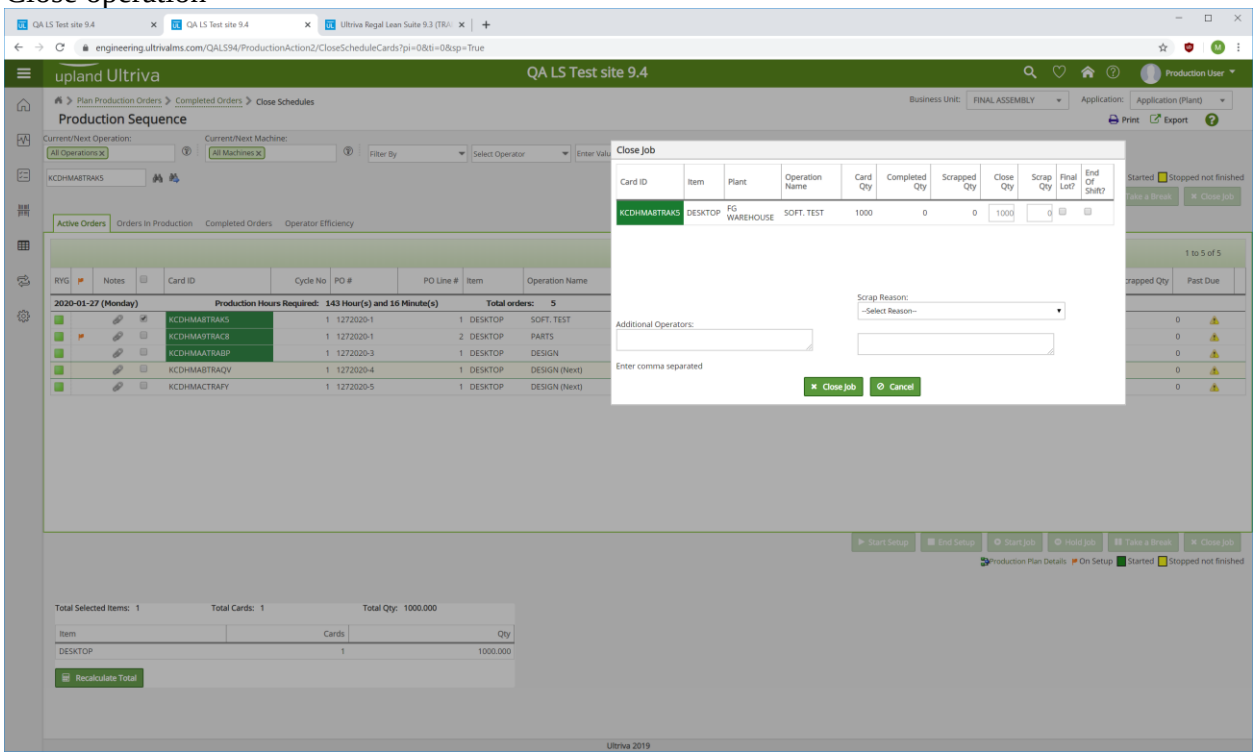
Close operation



Operator can set close quantity, scrap quantity, select scrap reason, indicate if it's final lot (job will be moved to the next operation), or indicate end of shift.

If close quantity is less than job quantity, operator can set end of shift and if final lot is not checked, the job will move on hold.

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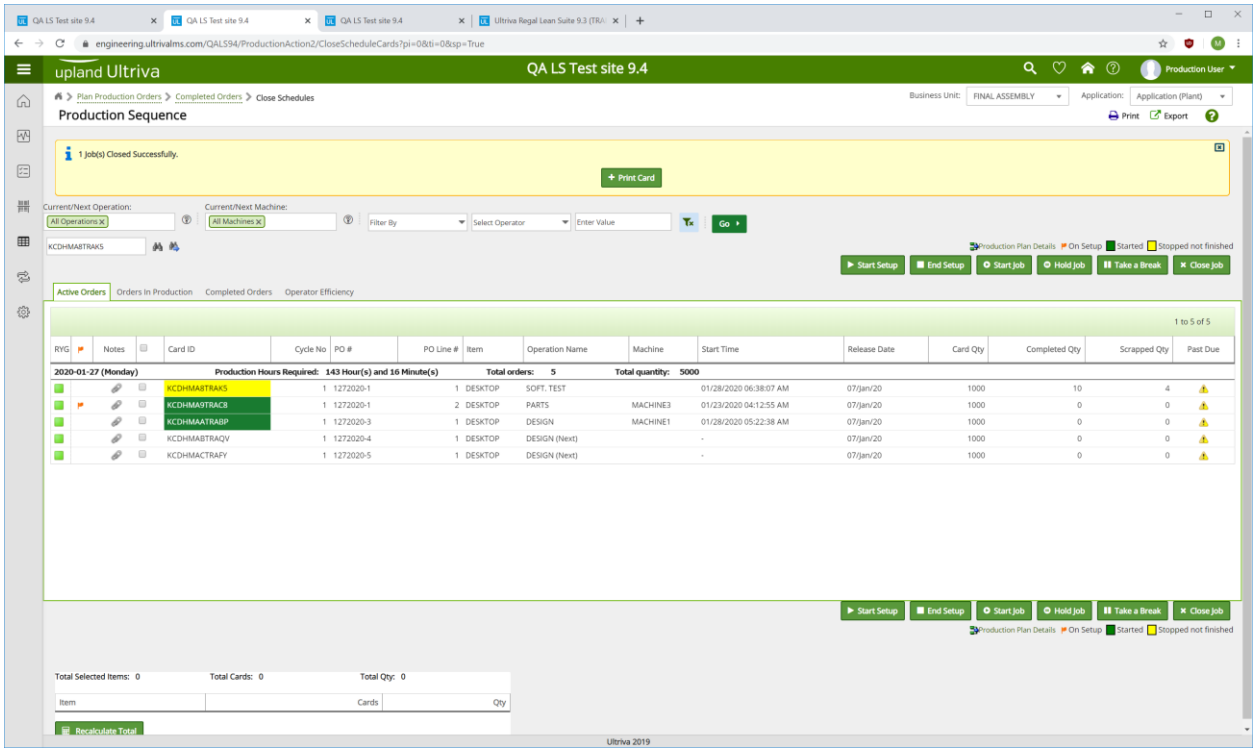

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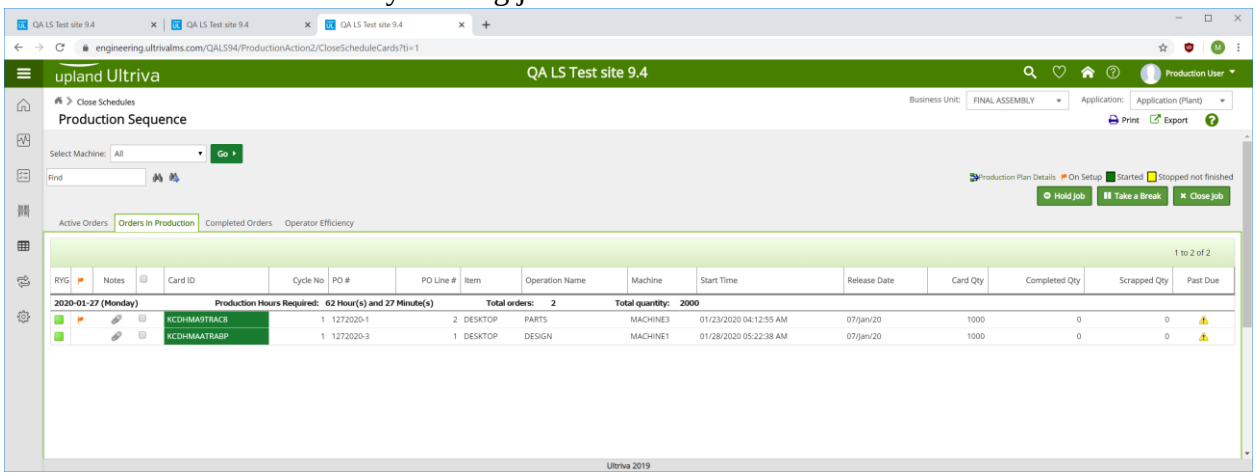
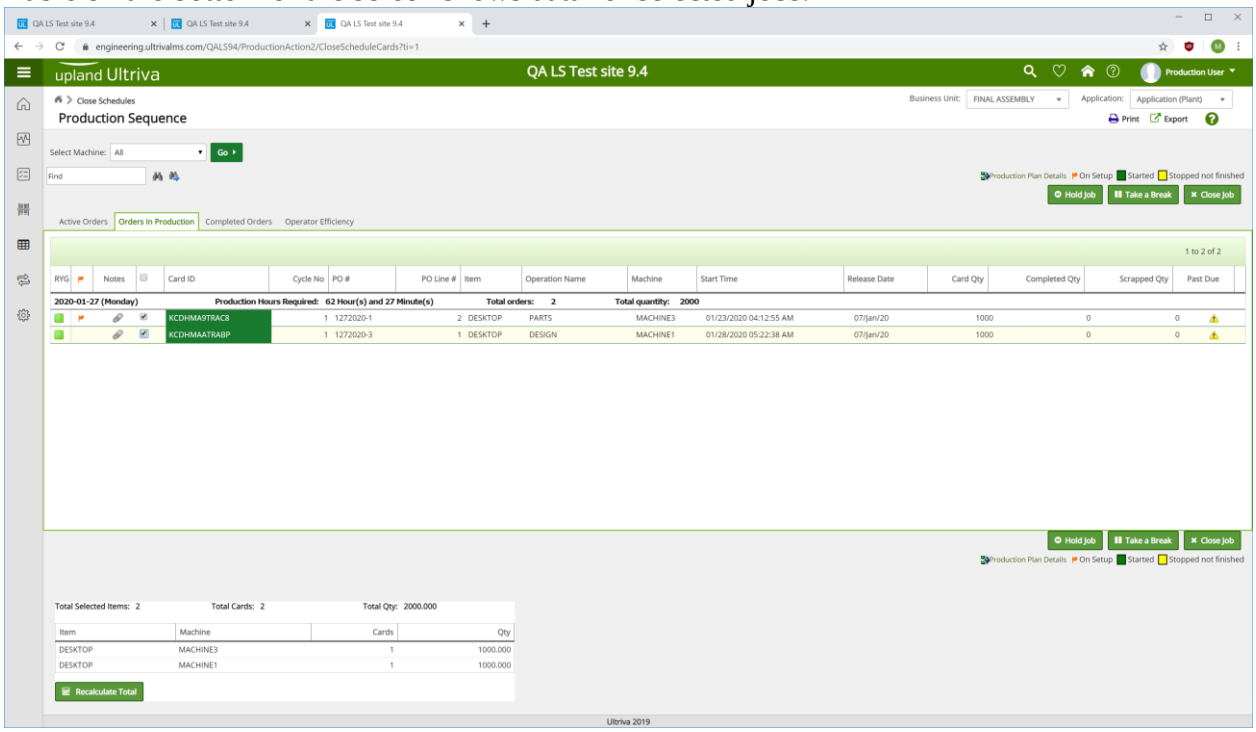
1.2.2.1 Orders In Production tab

This tab shows list of currently running jobs



Orders can be filtered by selecting machine.

Table on the bottom of the screen shows data for selected jobs:



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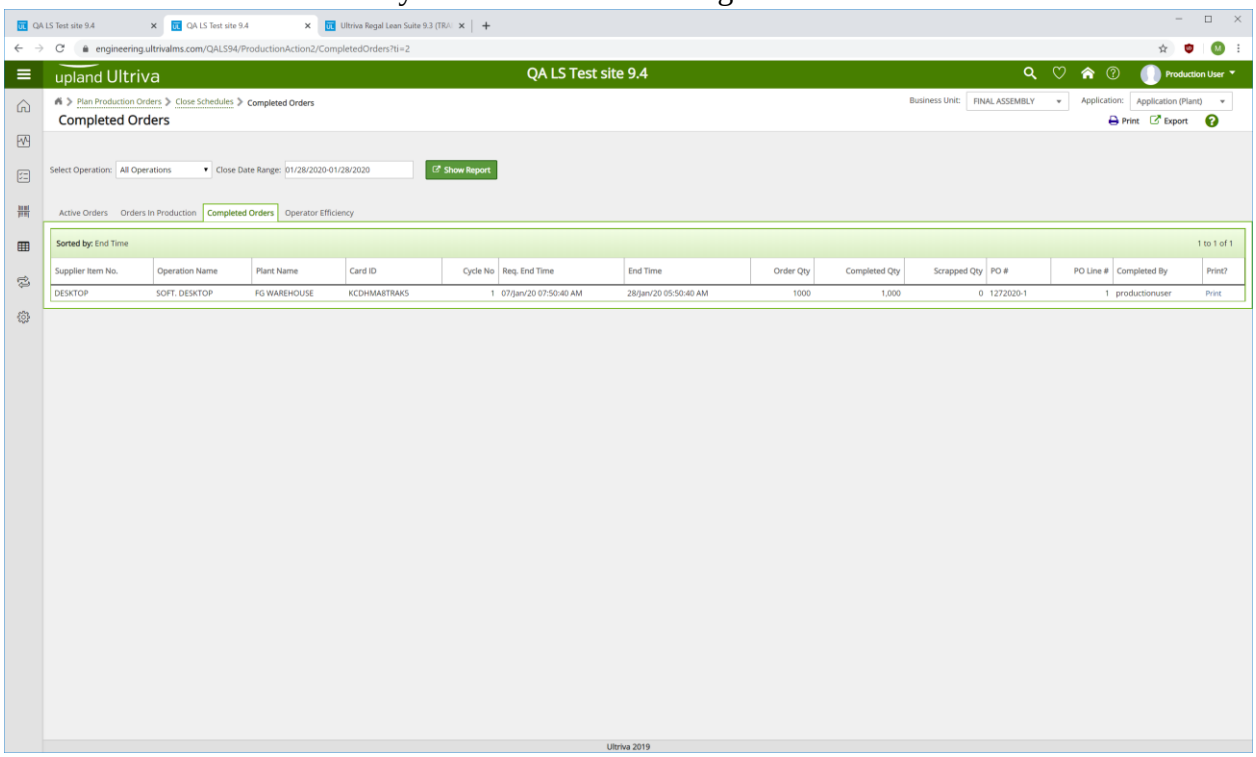
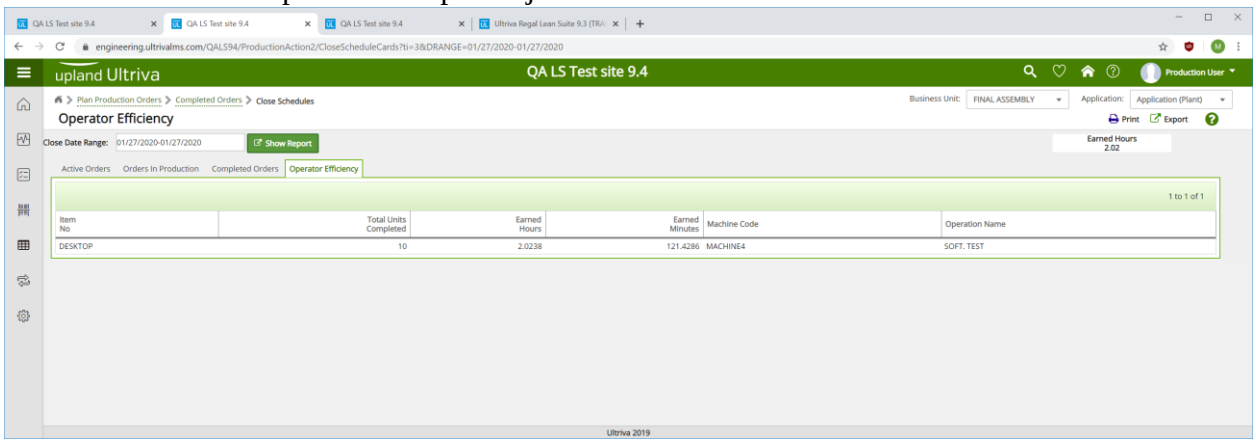
1.2.2.2 Completed Orders tab

This tab shows closed orders by current user in date range:



1.2.2.3 Operator efficiency tab

This tab shows time spent on completed jobs.



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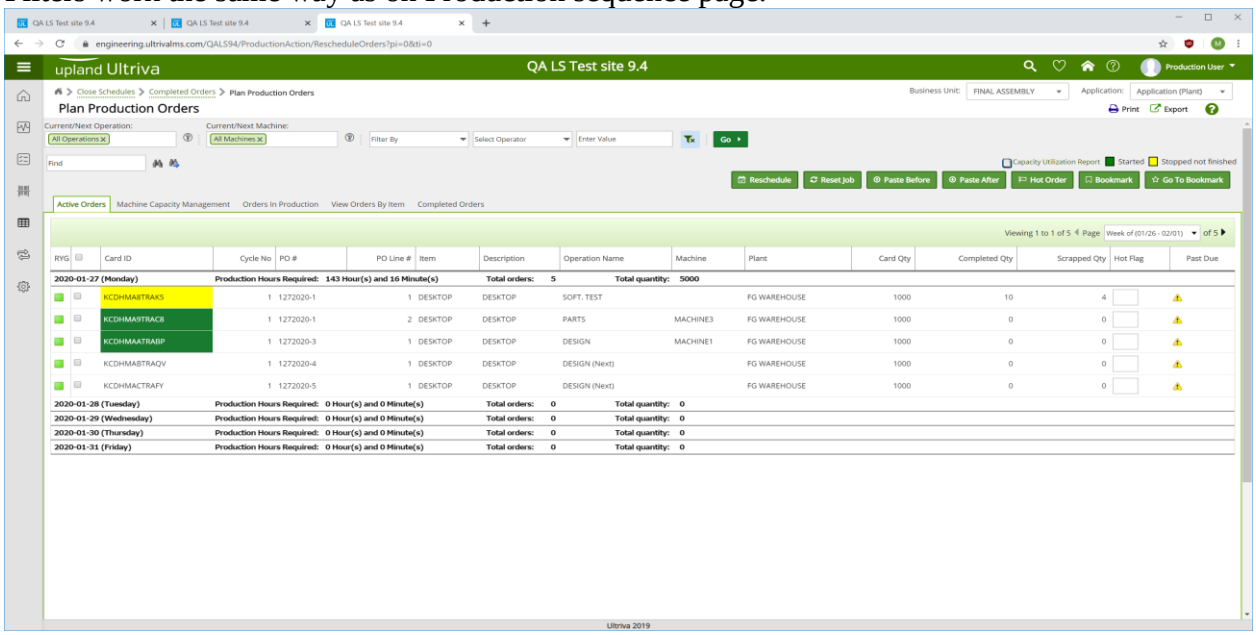
1.2.3 Manage Production Orders page

Those actions are available for manager/planner. All jobs currently scheduled in Business Unit will show there.

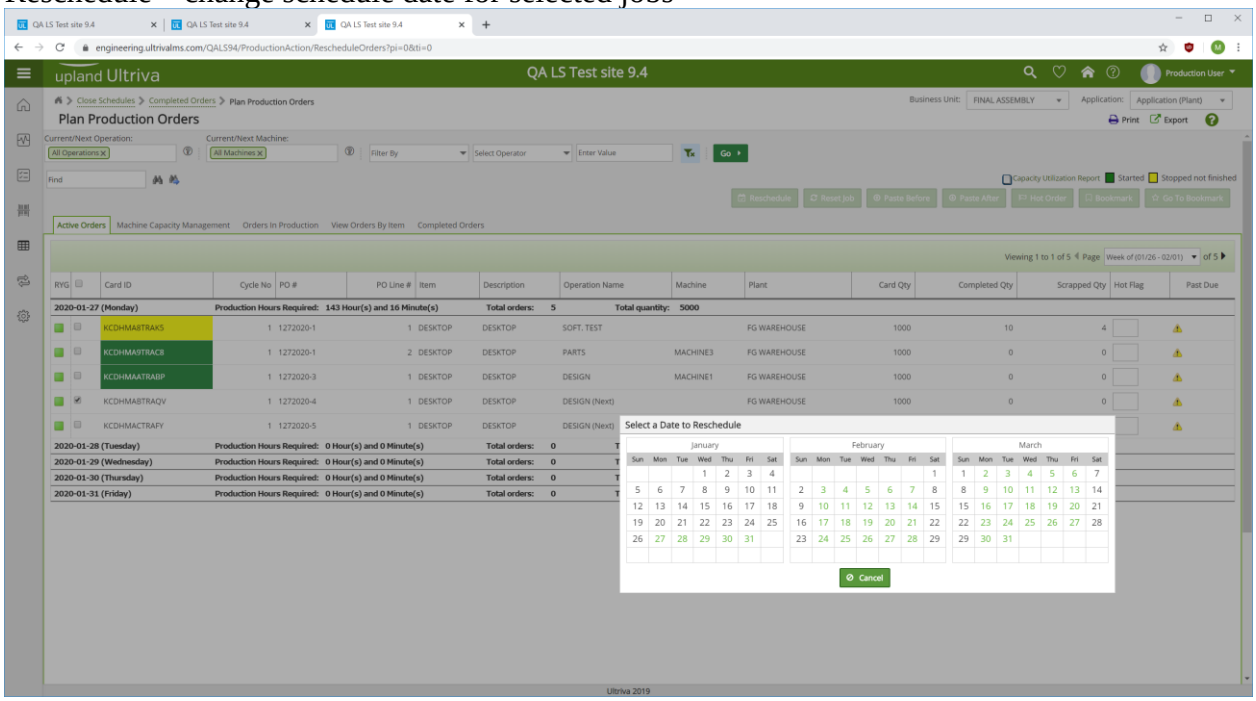
1.2.3.1 Plan Production Orders – Active Orders tab

Filters work the same way as on Production sequence page.



Actions available for planner are:

Reschedule – change schedule date for selected jobs



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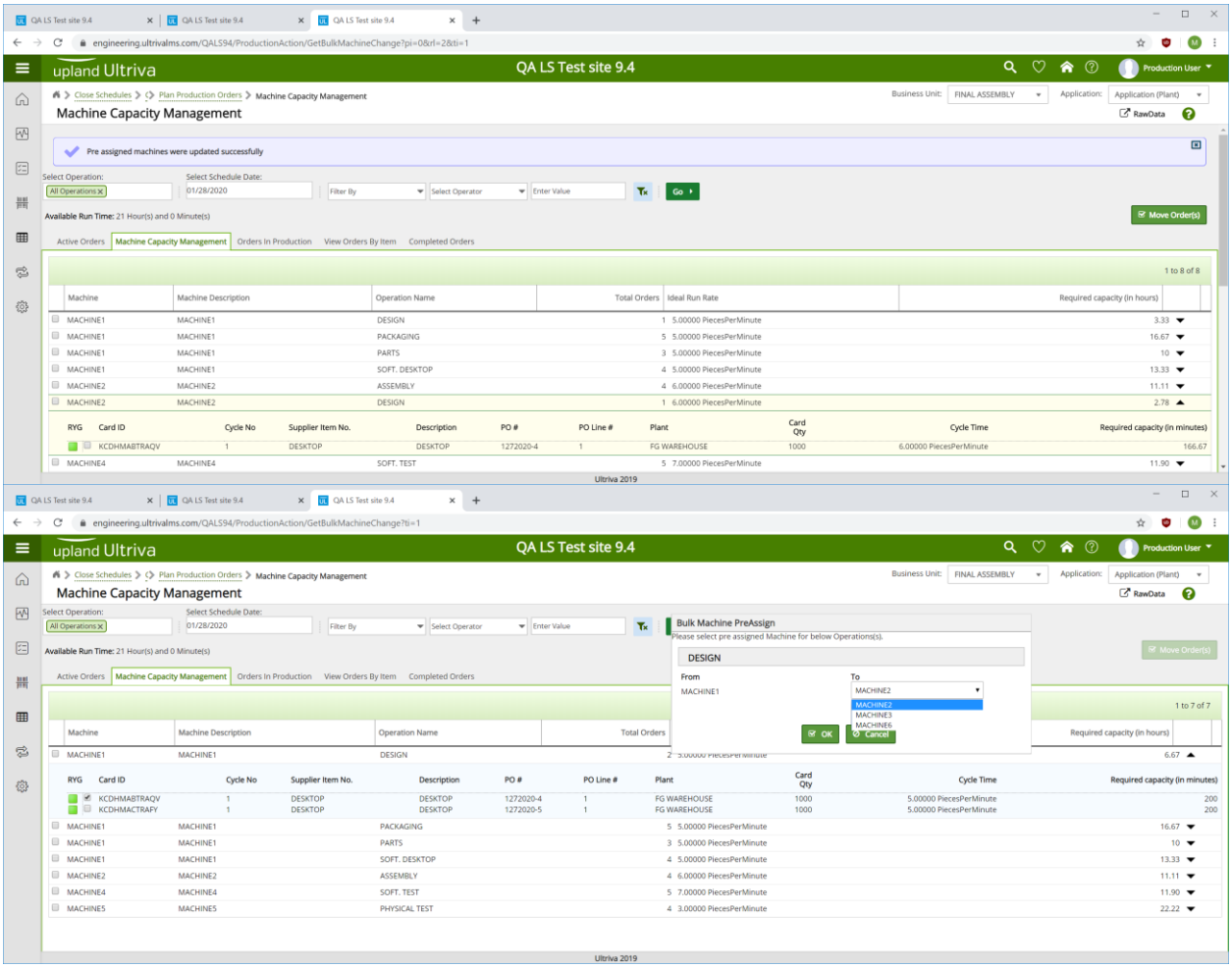
Reset – take job off from the hold; Paste before, paste after – move order of the jobs; Set Hot order flag on the job; Bookmark and find bookmarked job

1.2.3.2 Machine Capacity Management tab

Screen shows all machines/operations for the selected date with pre-assigned jobs for them and required run time. Using this screen, the planner can move jobs from one machine to another



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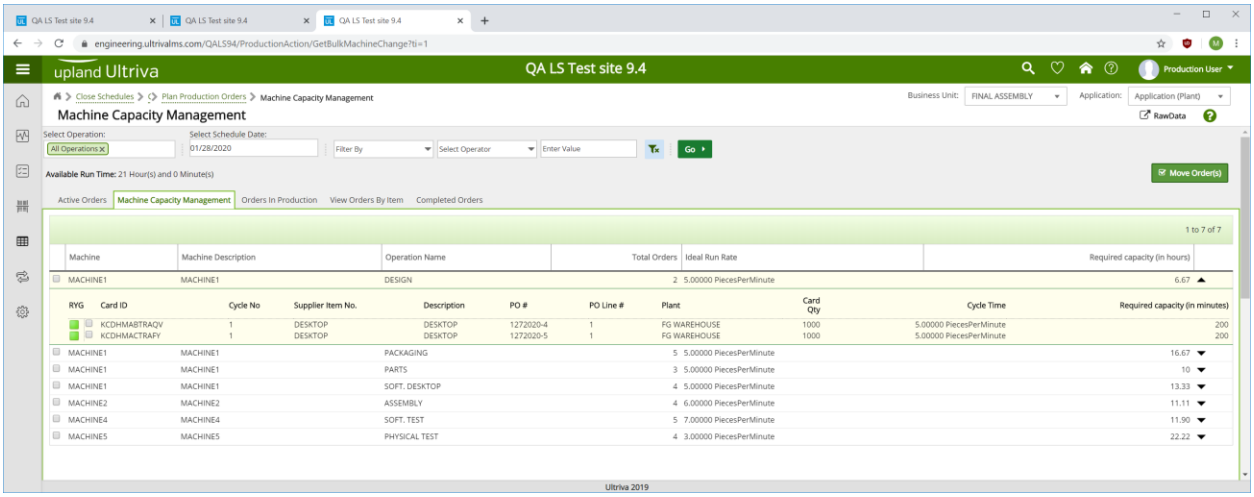
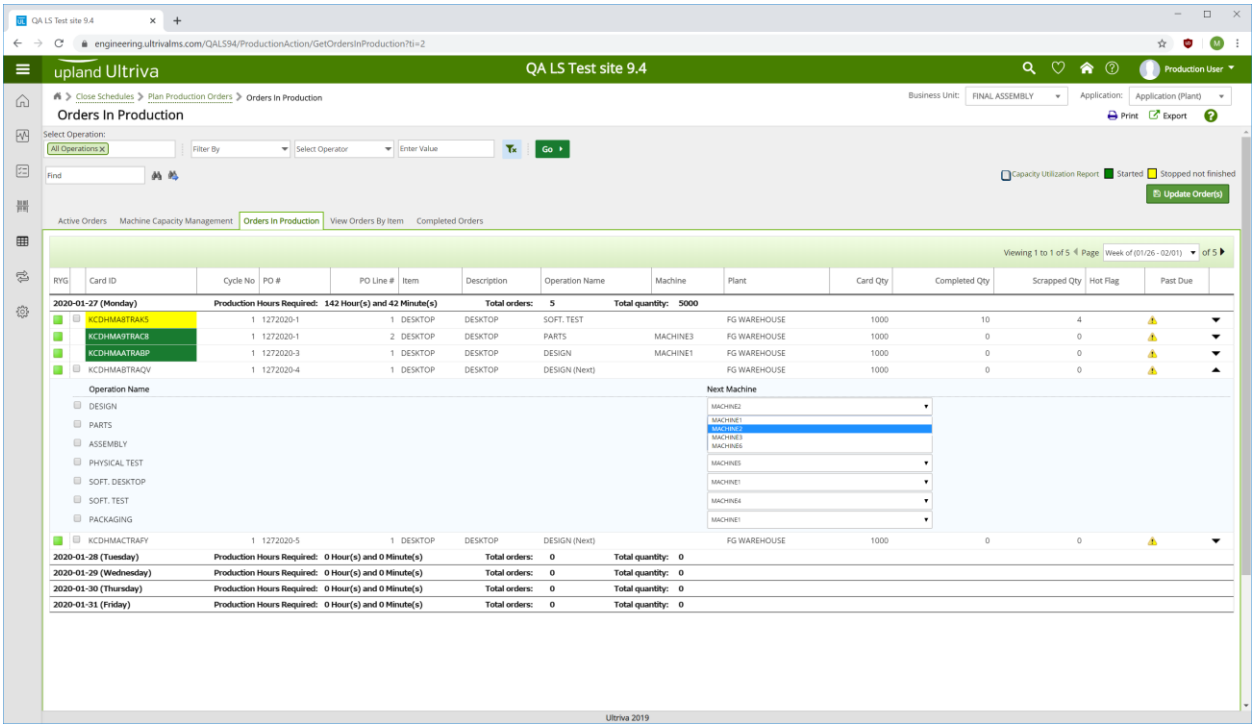


1.2.3.3 Orders In Production tab

This tab shows list of all scheduled orders and provide ability to change pre-assigned machine on individual orders:



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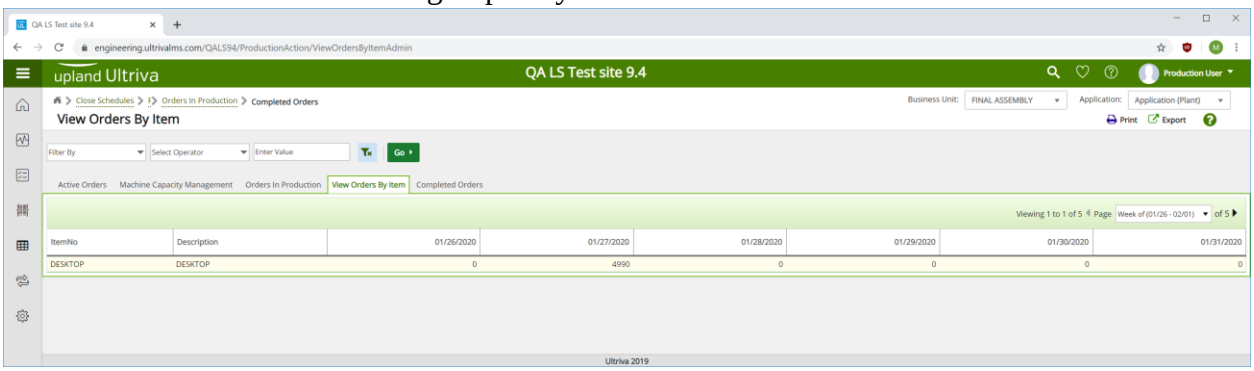
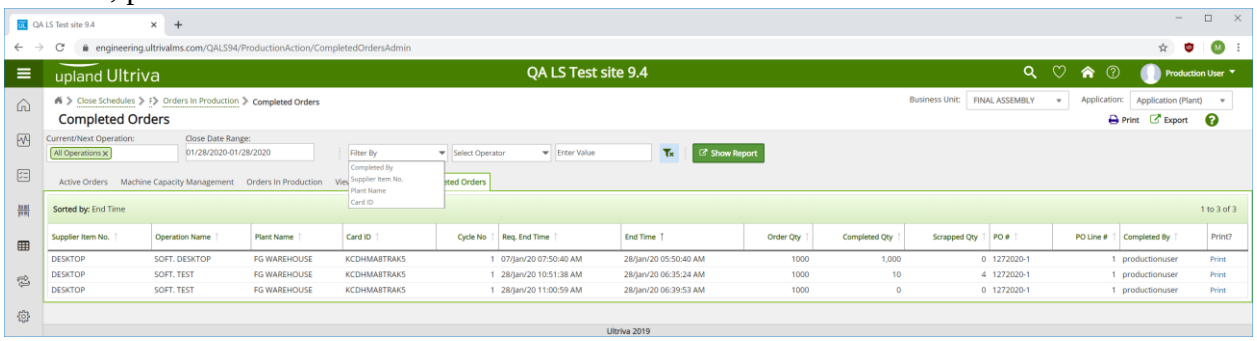
1.2.3.4 View Orders by Item tab

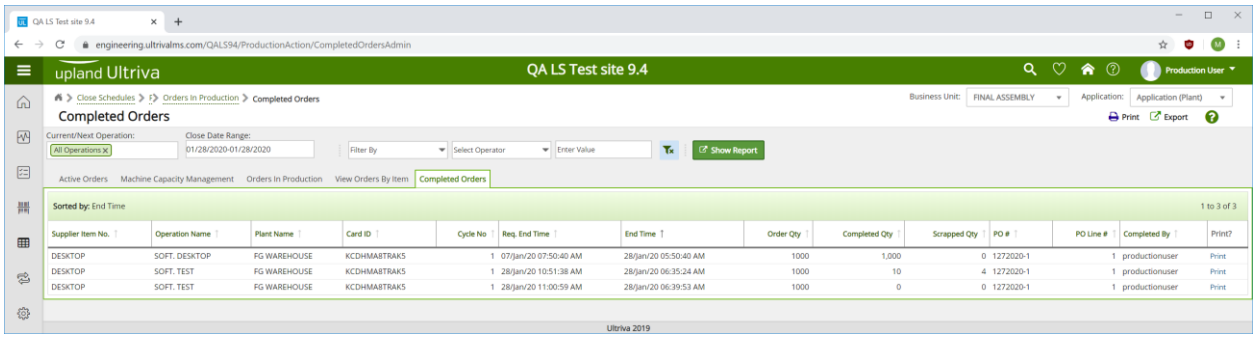
This tab shows scheduled orders grouped by item



1.2.3.5 Completed Orders tab

Shows all completed operations. User can filter by operation, date range, operator, Supplier Item No, plant and order id





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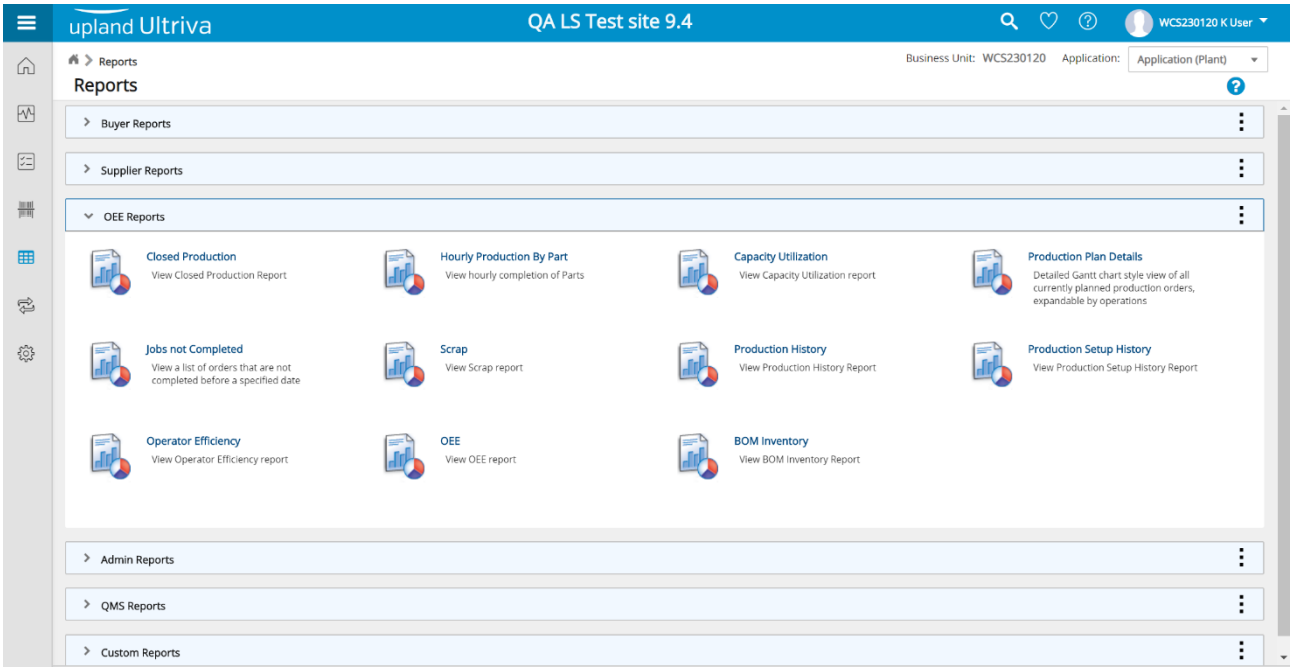
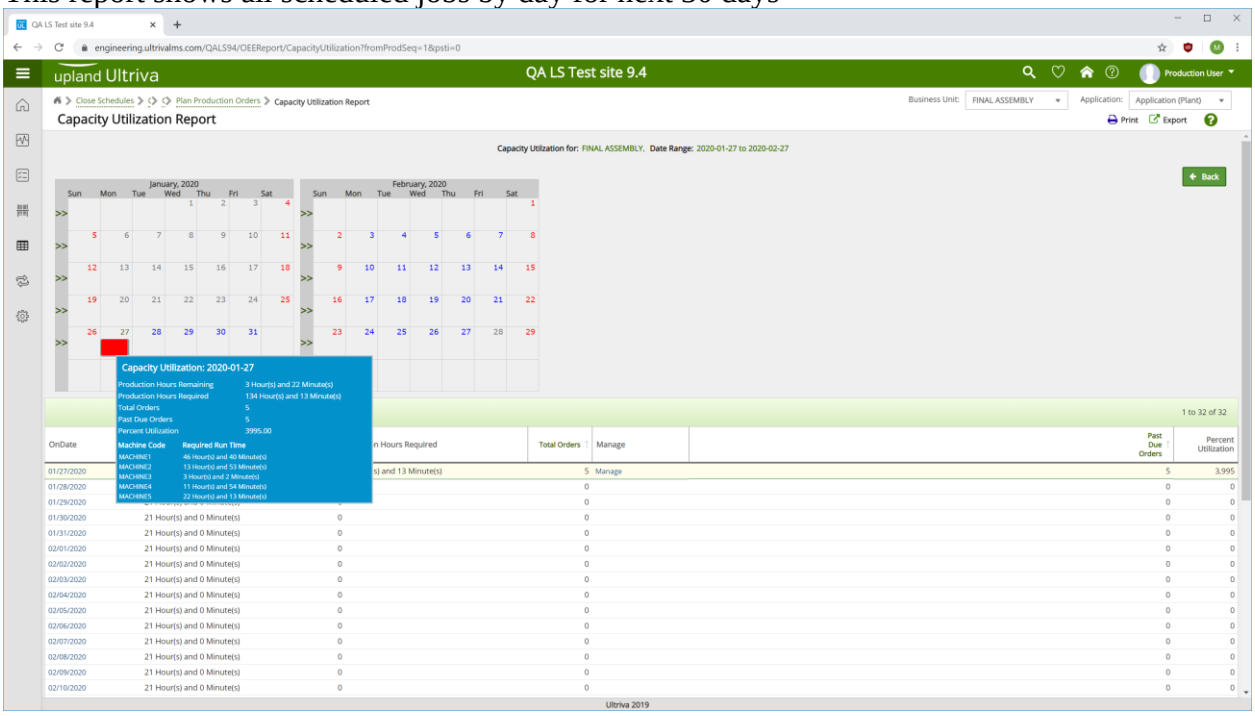
1.2.4 OEE Reports



1.2.4.1 Capacity Utilization Report

This report shows all scheduled jobs by day for next 30 days



Production Hours Remaining are calculated based on shifts and time of the day:

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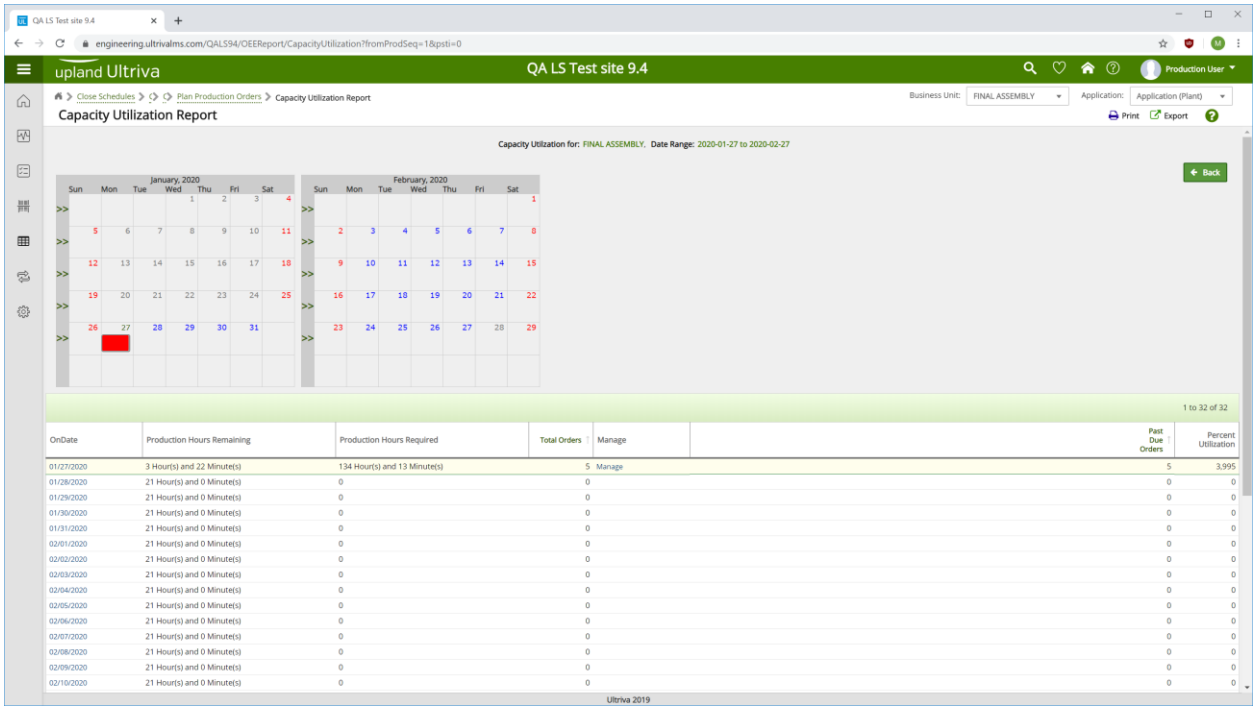
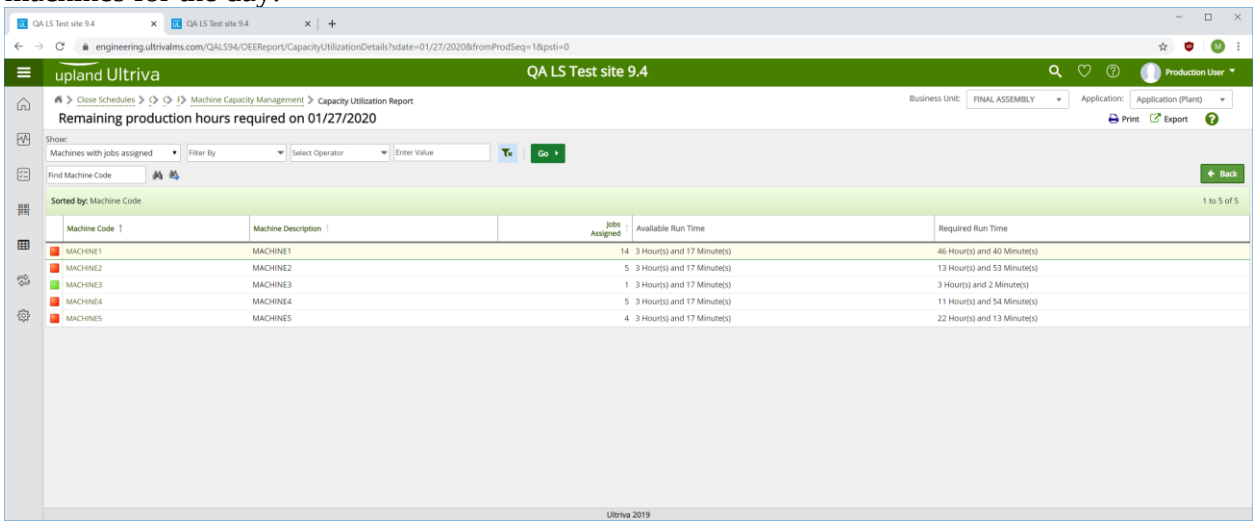


By clicking to link Manage planner will go to Machine Capacity Management page

Clicking on the date will take planner to page with list of all machines and jobs assigned to machines for the day:



Click on Machine Code to get to the page with all jobs pre-assigned to this machine for the day:

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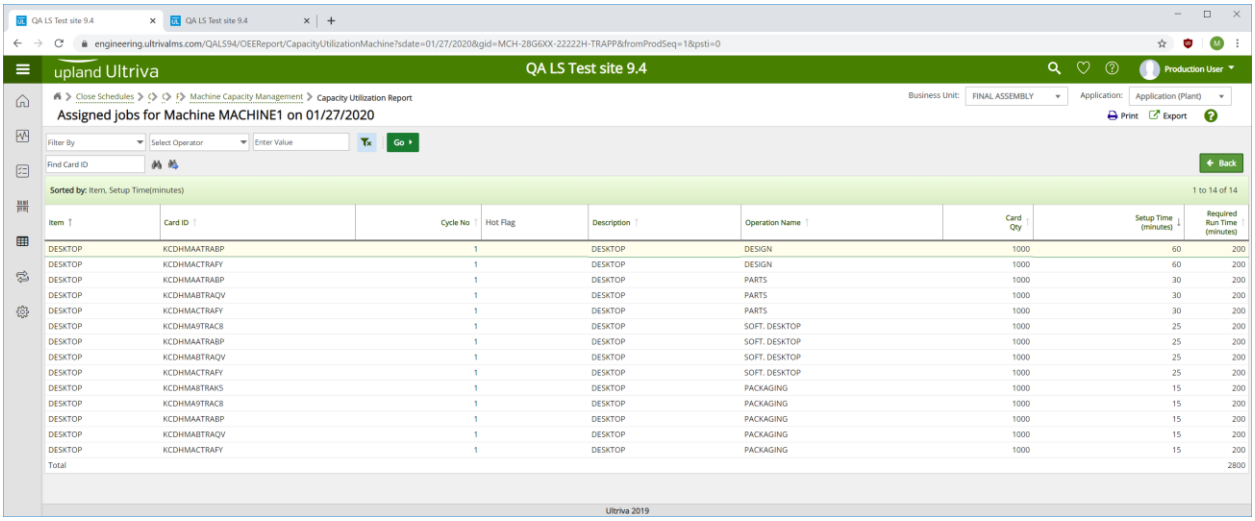

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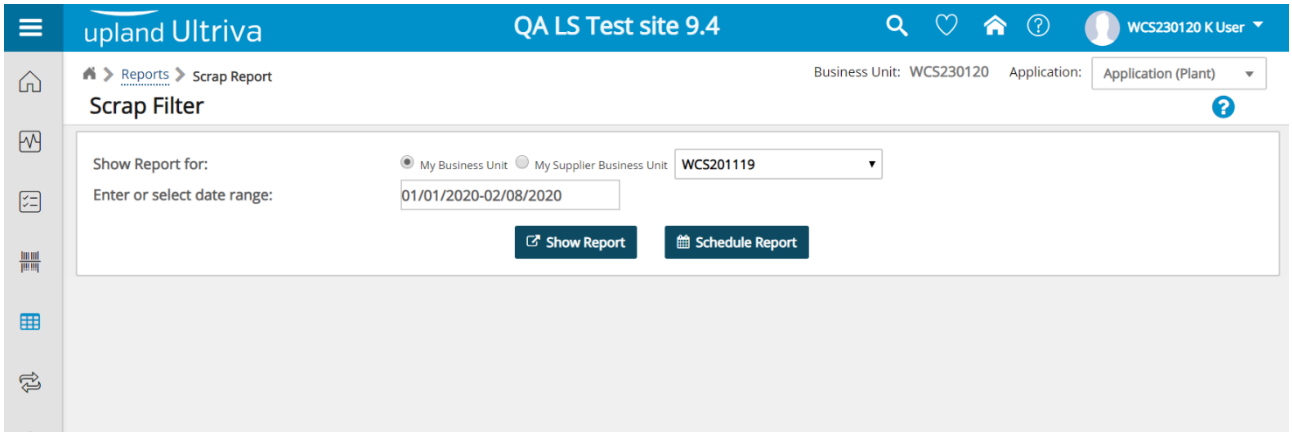
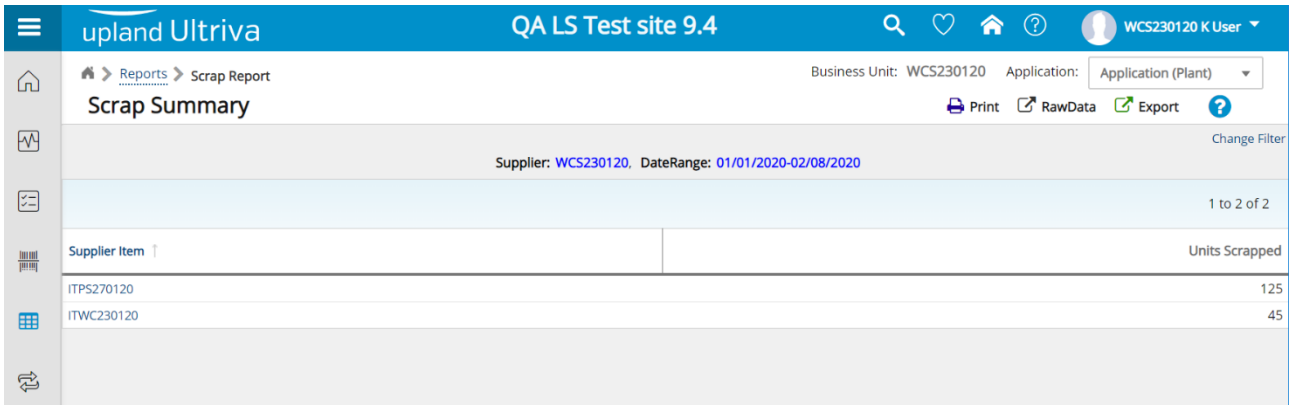
1.2.4.2 Scrap report

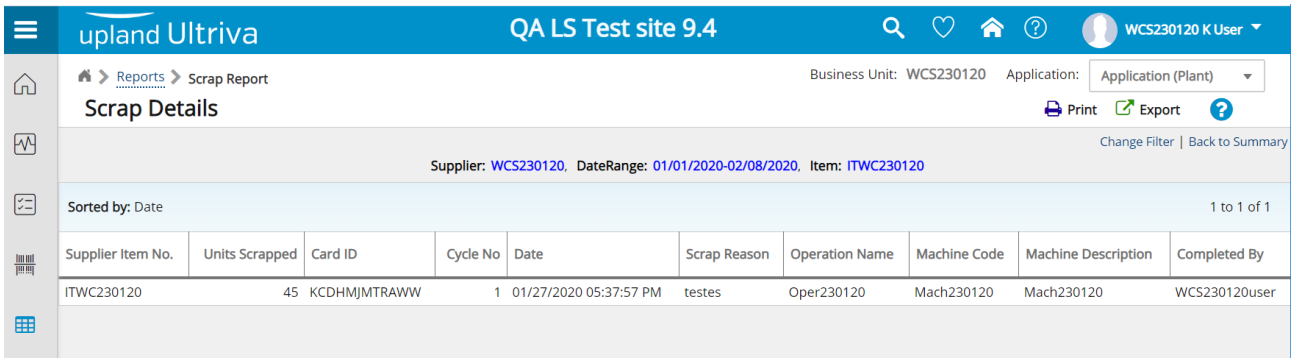
Scrap report shows recorded scrap for selected Business Unit and date range



Summary report shows scrap per item



Details report shows individual jobs



In version 9.4 added operation and machine to scrap details report.

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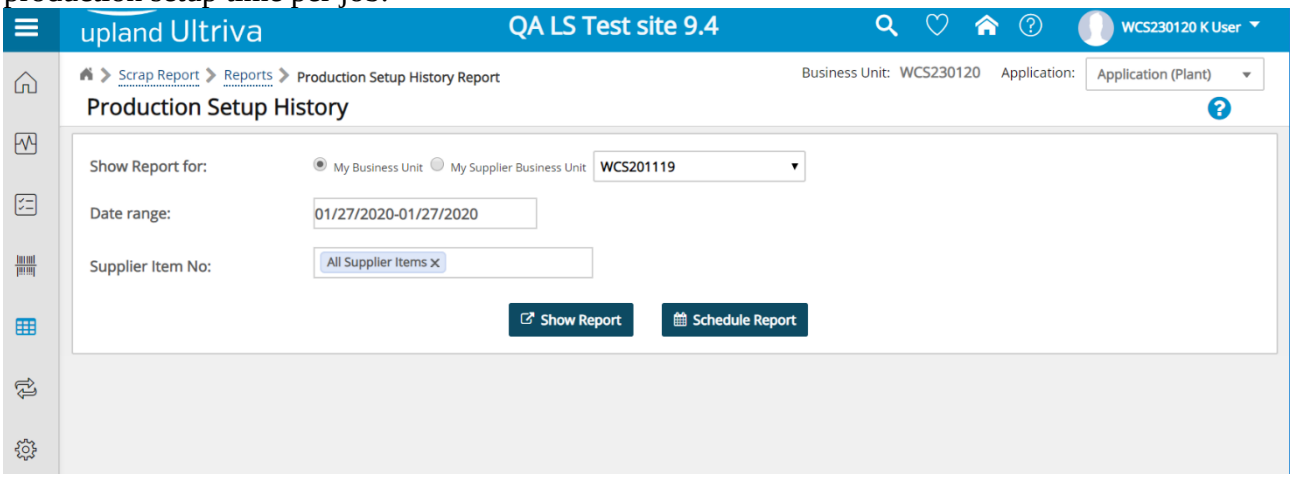
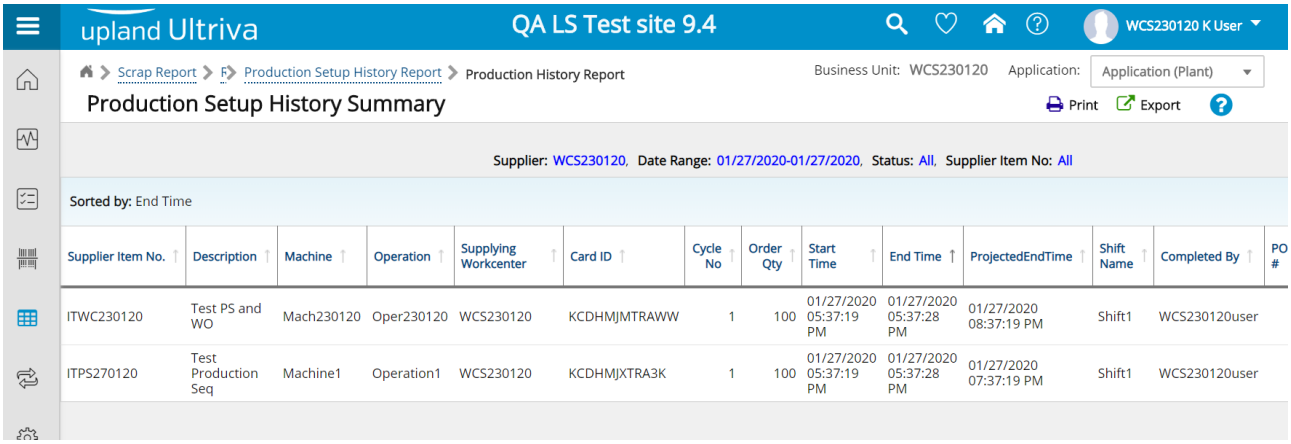
1.2.4.3 Setup Operation History Report

Added new OEE report - Production Setup history report. This report shows recorded production setup time per job.





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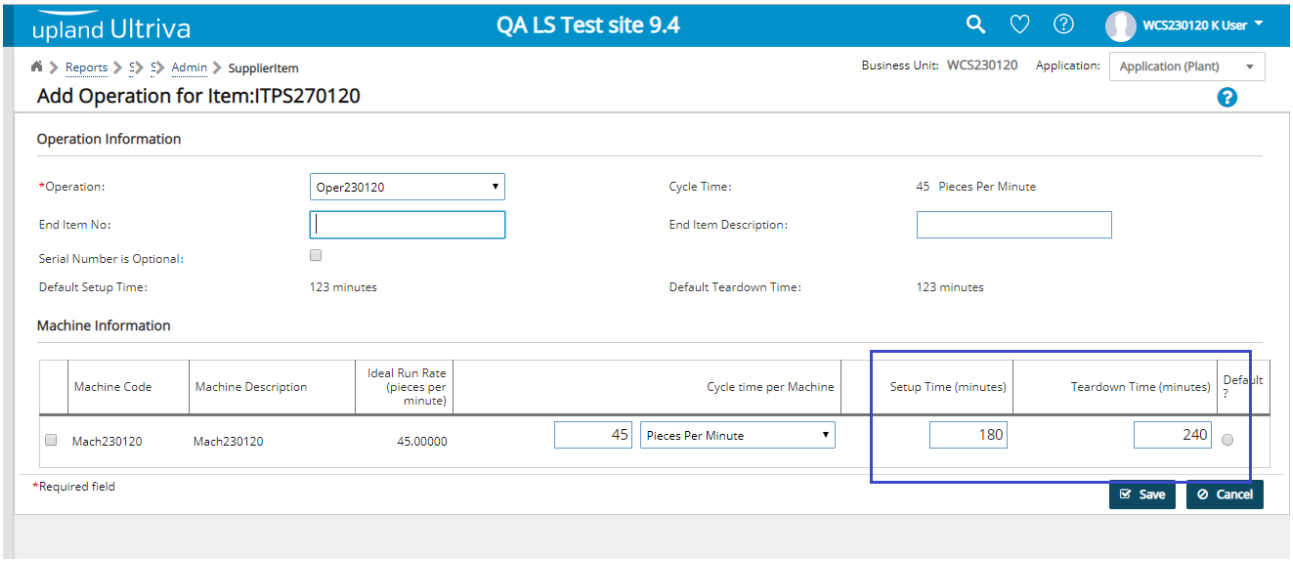
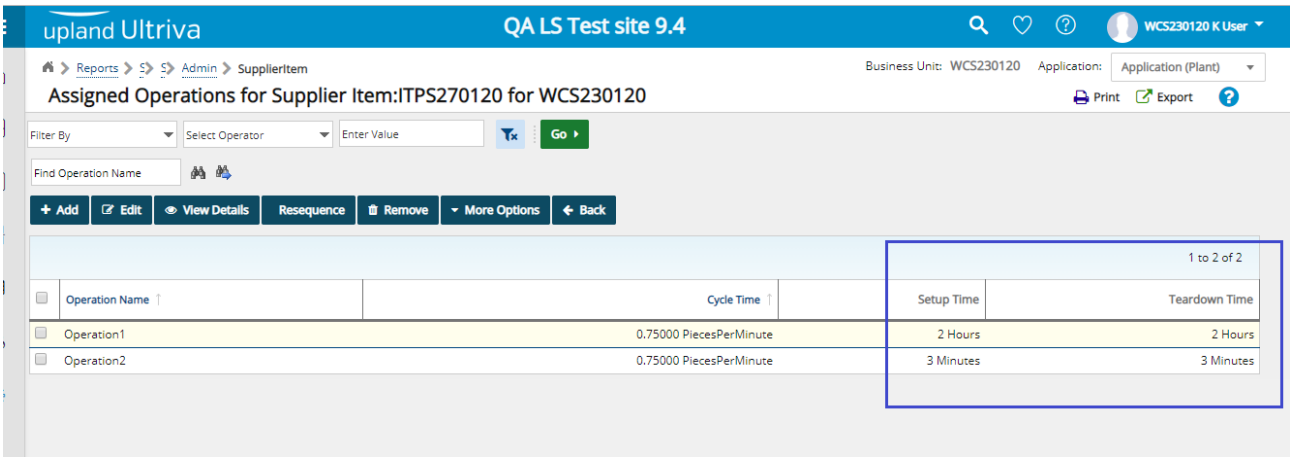
1.2.5 Add Setup/Teardown time on Supplier Item/Operation/Machine Level

Setup time and tear down time can be setup on supplier item/operation/Machine level. Default values are coming from default operation setup/teardown time





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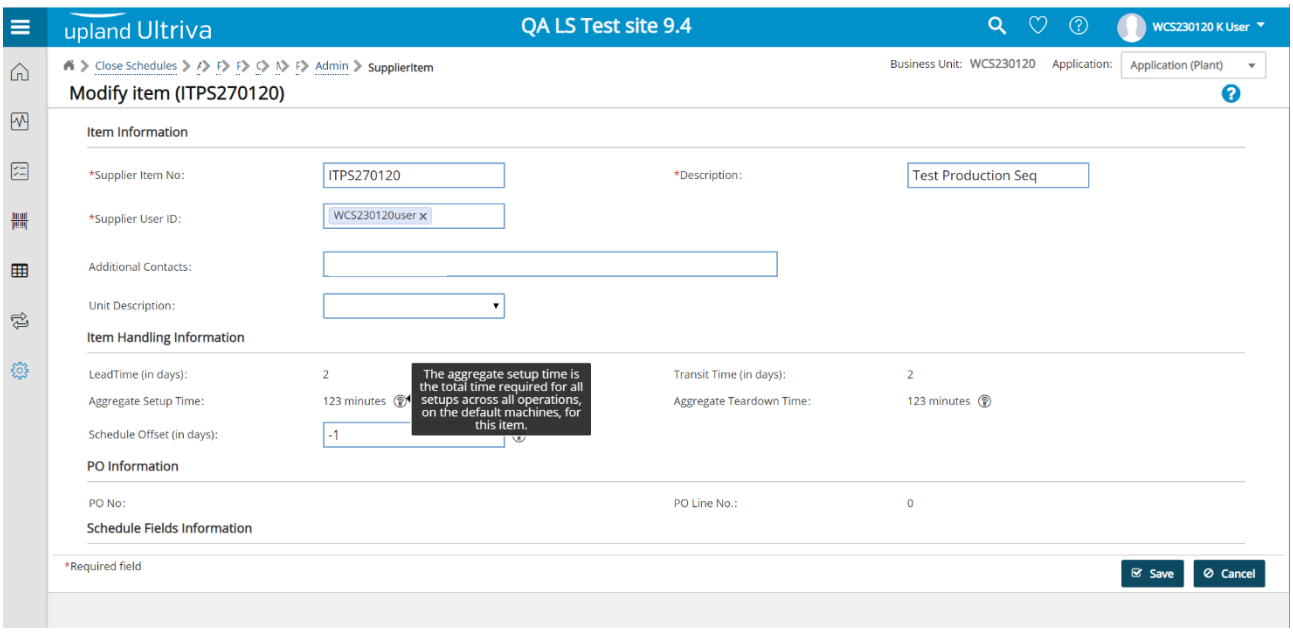
Supplier Item shows aggregated setup and teardown time. Tooltips explain the values:

The aggregate setup time is the total time required for all setups across all operations, on the default machines, for this item.

The aggregate teardown time is the total time required for all teardowns across all operations, on the default machines, for this item.



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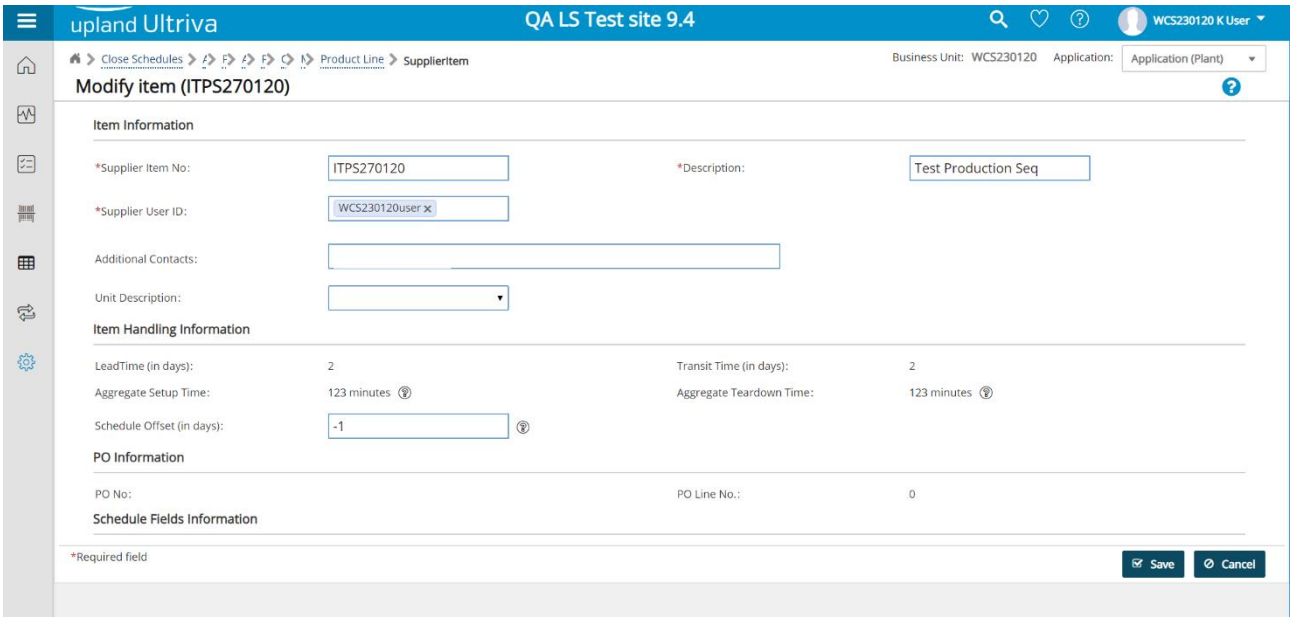
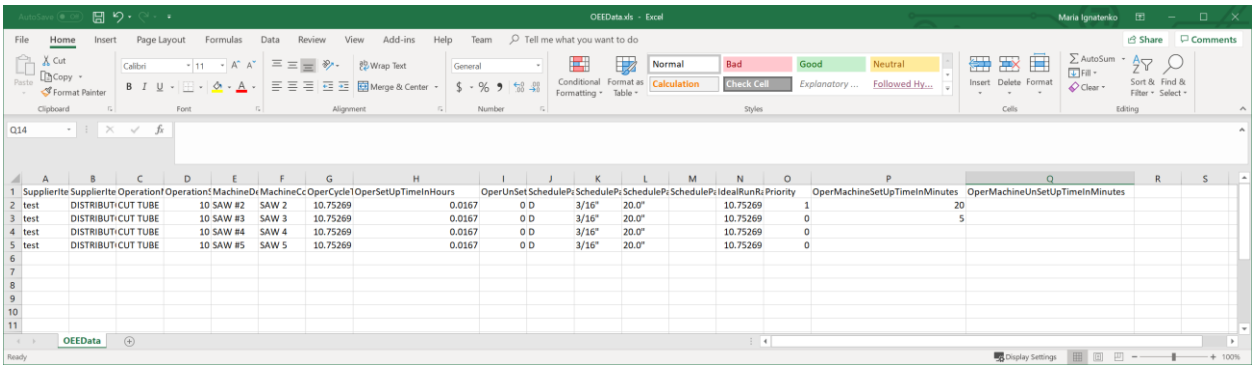
1.2.6 OEE Data Load enhancements

Added 3 new optional parameters to OEED Data Load:

ScheduleOffset for Supplier Item: double type value, default is -1 (schedule offset not set for an item and will be used schedule offset from Production Sequence Configuration for the Business Unit)



OperSetUpTimeInHours and OperUnSetUpTimeInHours:
If operation gets created during OEE Data Load, we are using those values on creation.
If operation already exists in the system, no update will be done on OEE Data Load.
2 optional fields are added to OEE Data Load:
OperMachineSetUpTimeInMinutes and OperMachineUnSetUpTimeInMinutes and 2 fields added to table EboItemOp2Machine I2OM_SetupTime and I2OM_TearDownTime
If OperSetUpTimeInHours and/or OperUnSetUpTimeInHours are not set in input file and operation already exists in the system, we are taking value from operation.



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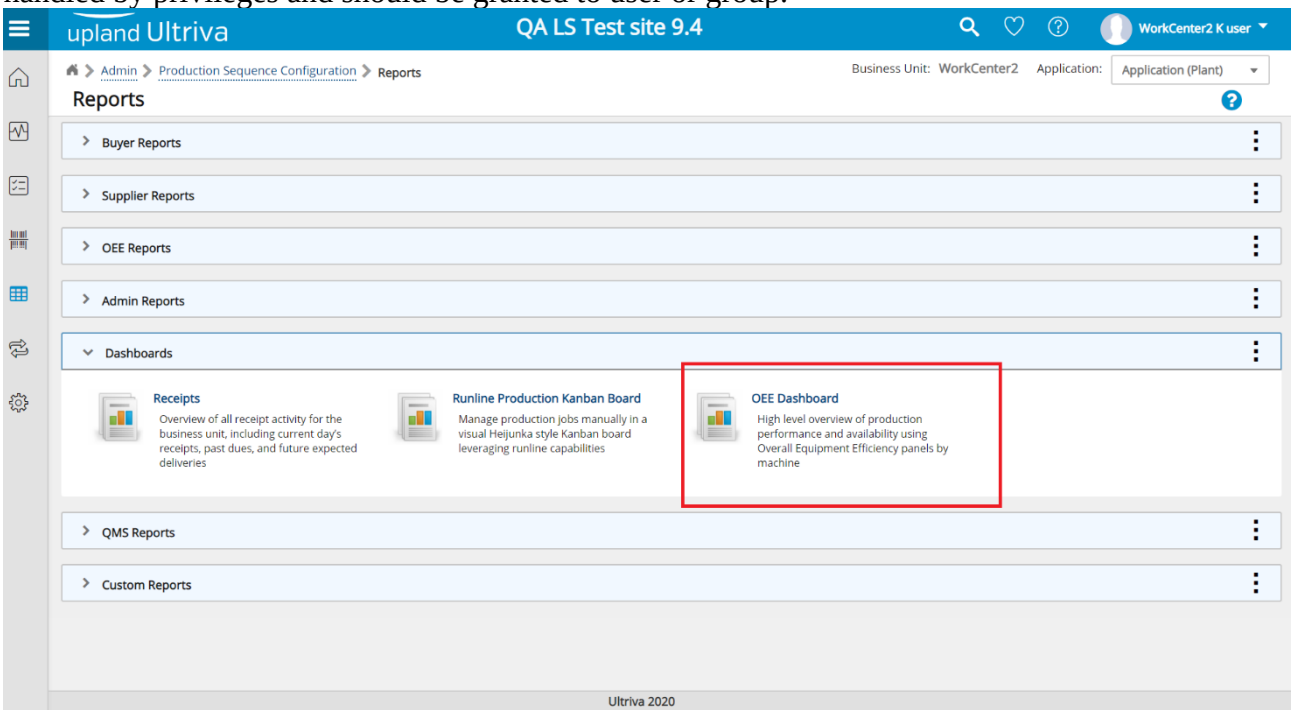
1.2.7 OEE dashboard moved under dashboards tab.

Add filter to show only active machines or all machines

OEE Dashboard was moved from workcenter home to Reports/Dashboards section. This report is handled by privileges and should be granted to user or group.



Page has Show filter by default set to Active Machines, it will load by default machines with active/running jobs. In case user wants to see all the machines, filter should be changed to All Machines.

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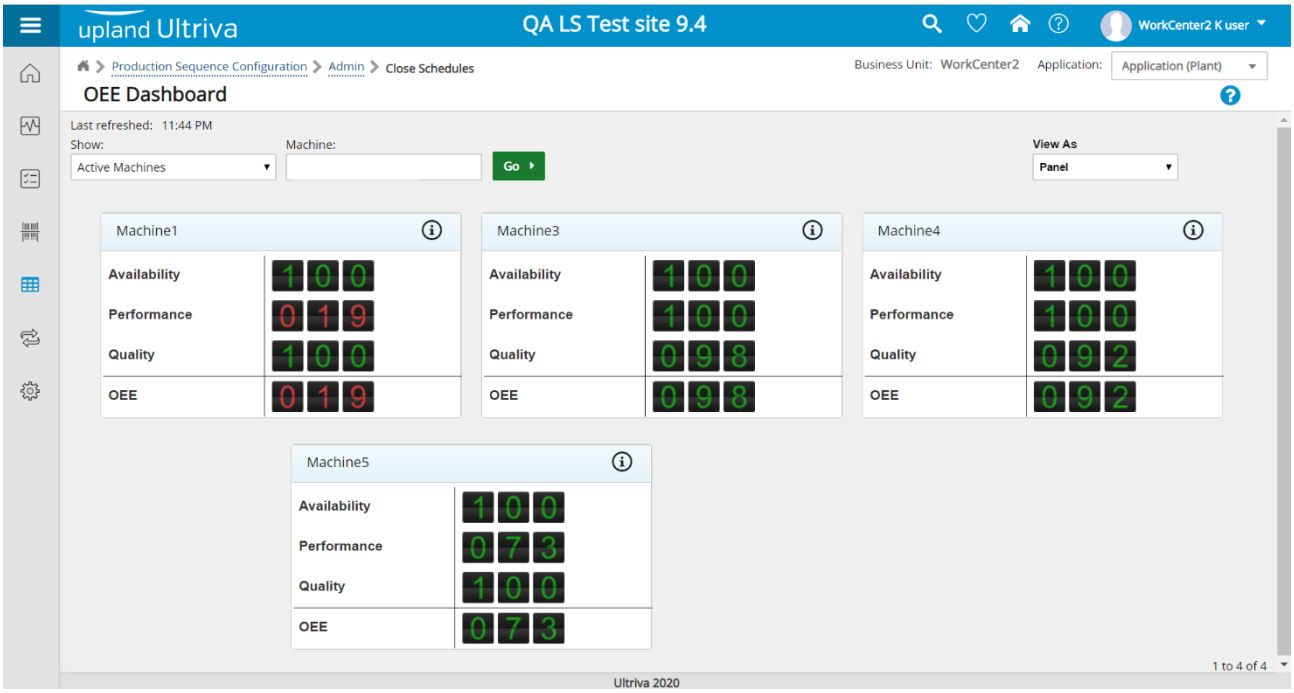
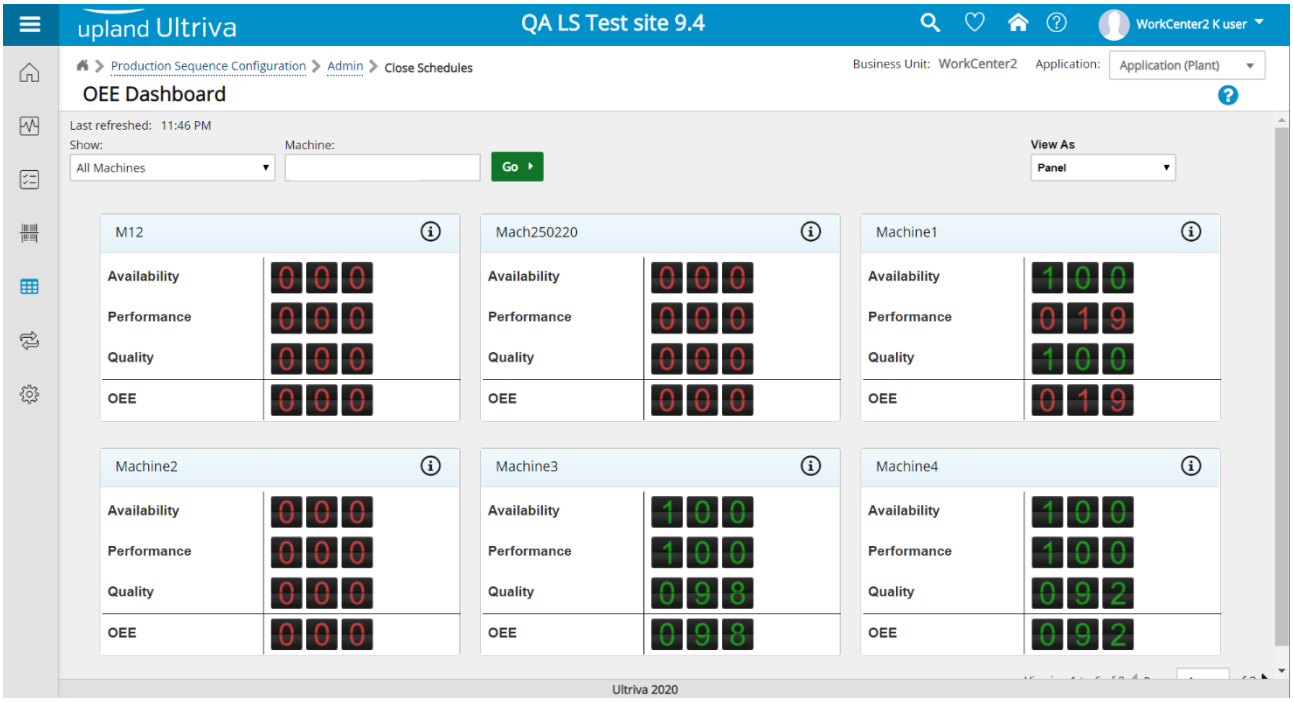


When Machine lookup field is used to search machines, corresponding page on dashboard will be set to show machine.



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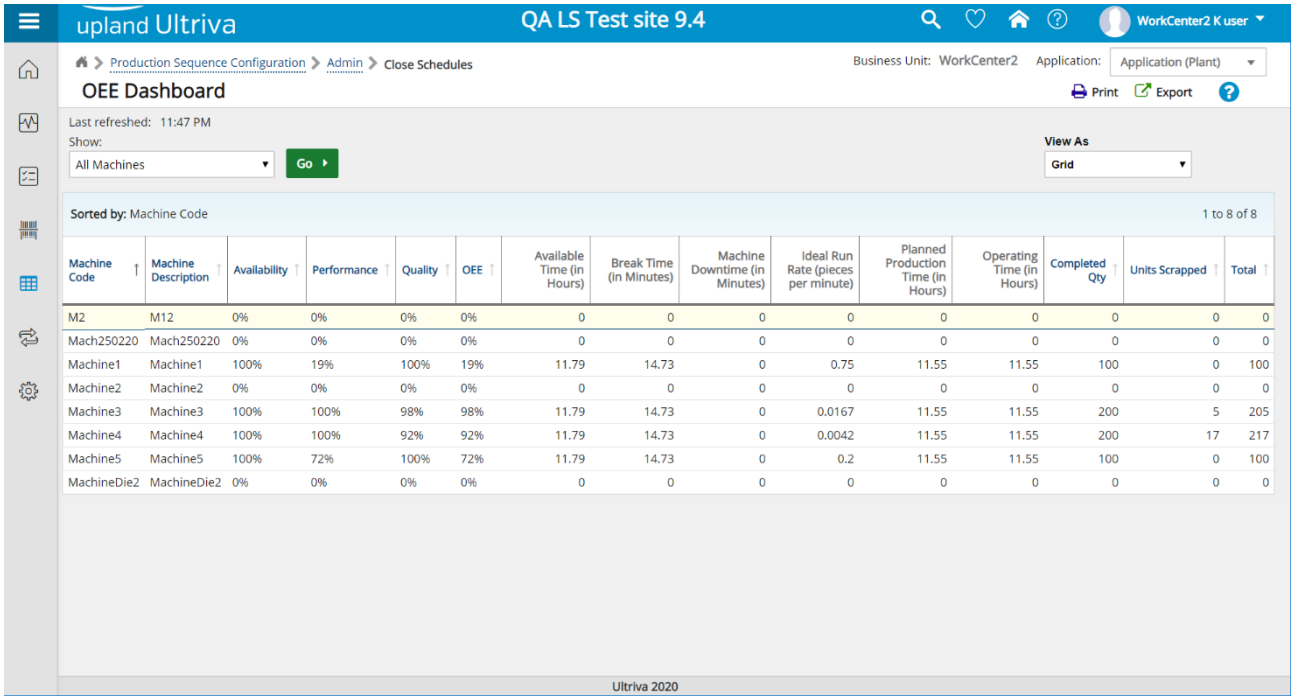
Grid view has Show filter too, showing Active Machines by default.



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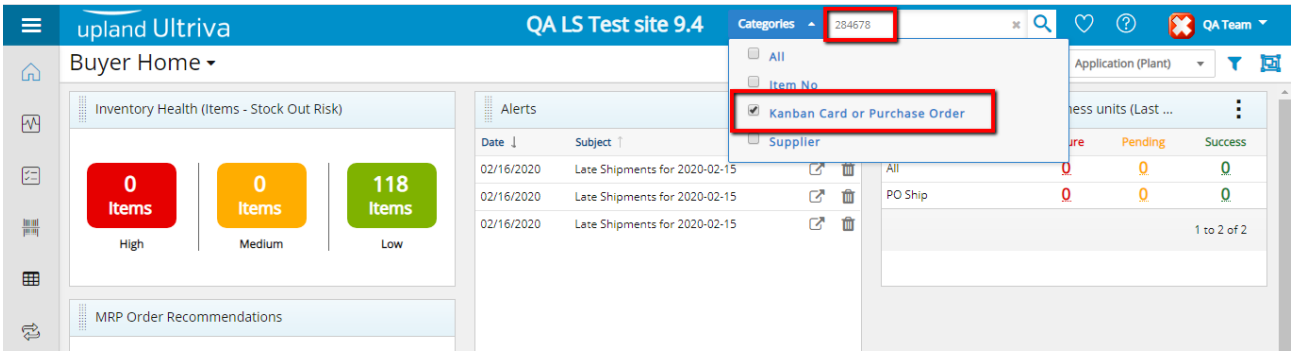
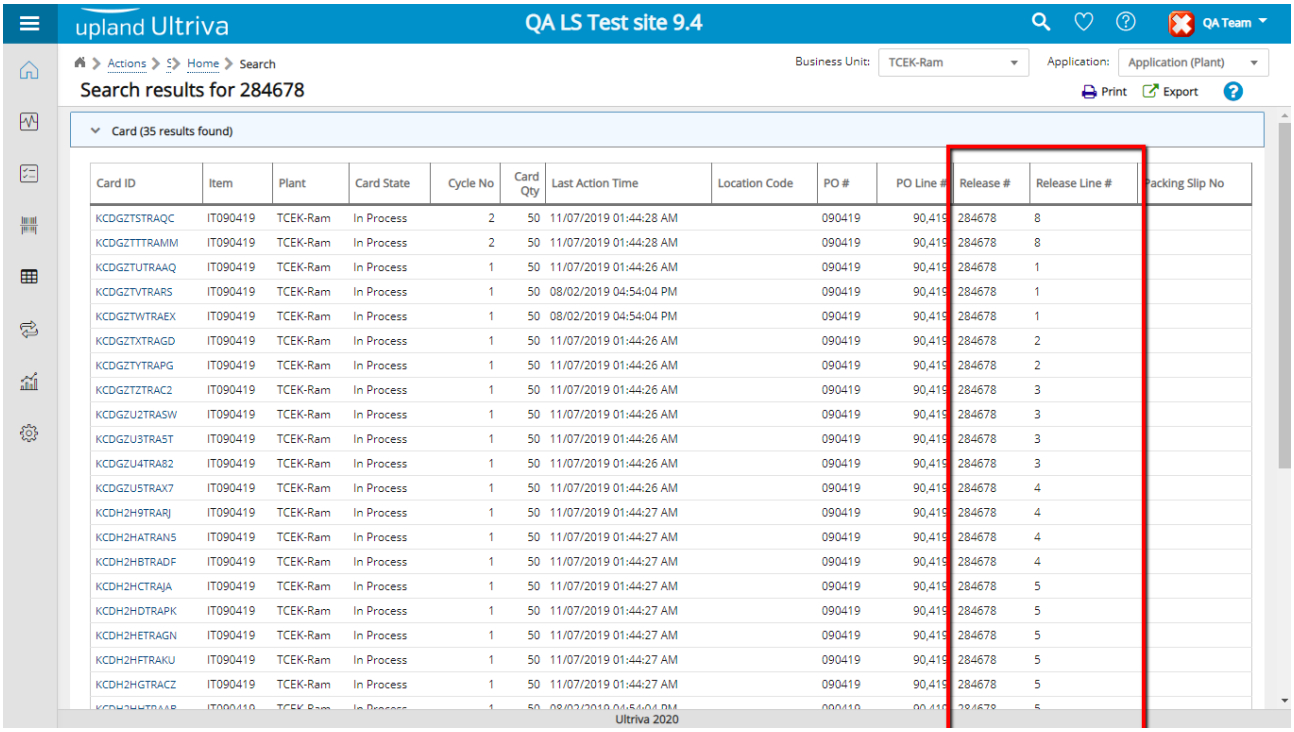
1.3 Add SupplierPoReleaseNum and SupplierPoReleaseLineNum to the Search

System configuration is available to do search by PO Release # and PO Release Line #





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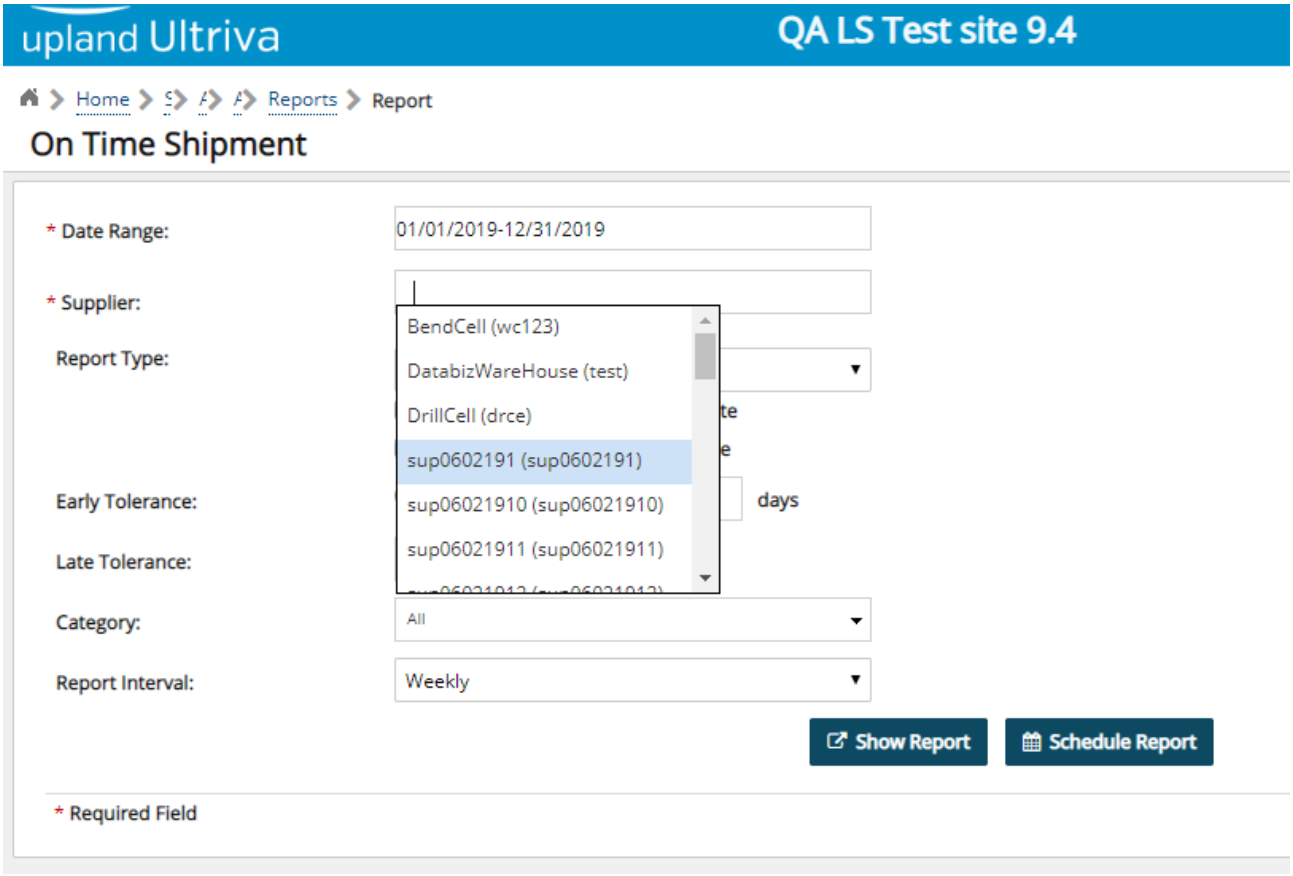
1.4 Supplier Code display along with Supplier Name

If Business Unit configuration has setting Custom -> Append supplier code to supplier name in dropdown lists is ON then Supplier field will show Supplier Code for Buyer Reports and OEE Reports



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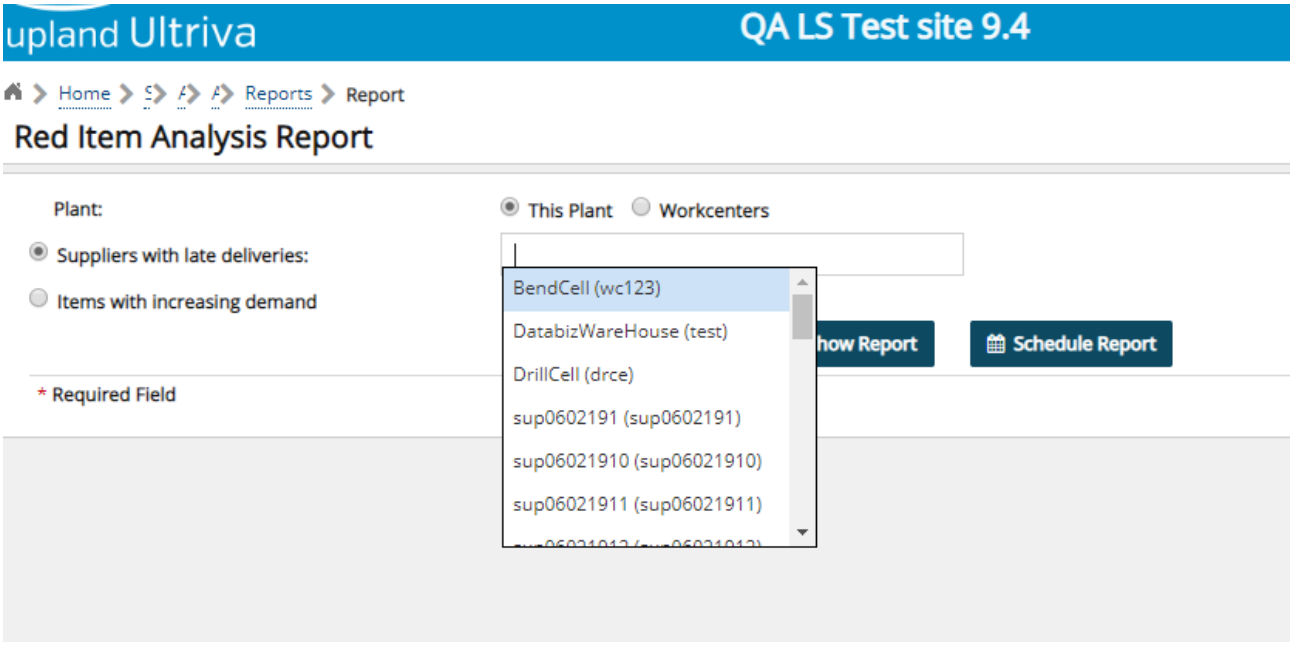

1.5 Receive with Serial Number

1.5.1 Receive Action for Serial Controlled Items

For items flagged as Serial Controlled allow to set Serial Number on Receive screen, under Receive tab for Business Unit configuration settings, (Plant and Workcenter,) added a new setting named "Serial Numbers for Serial Controlled Items on Receive". It has 3 possible options on the plant side: None, Optional, or Required. Optional is the default value when it has not been set.

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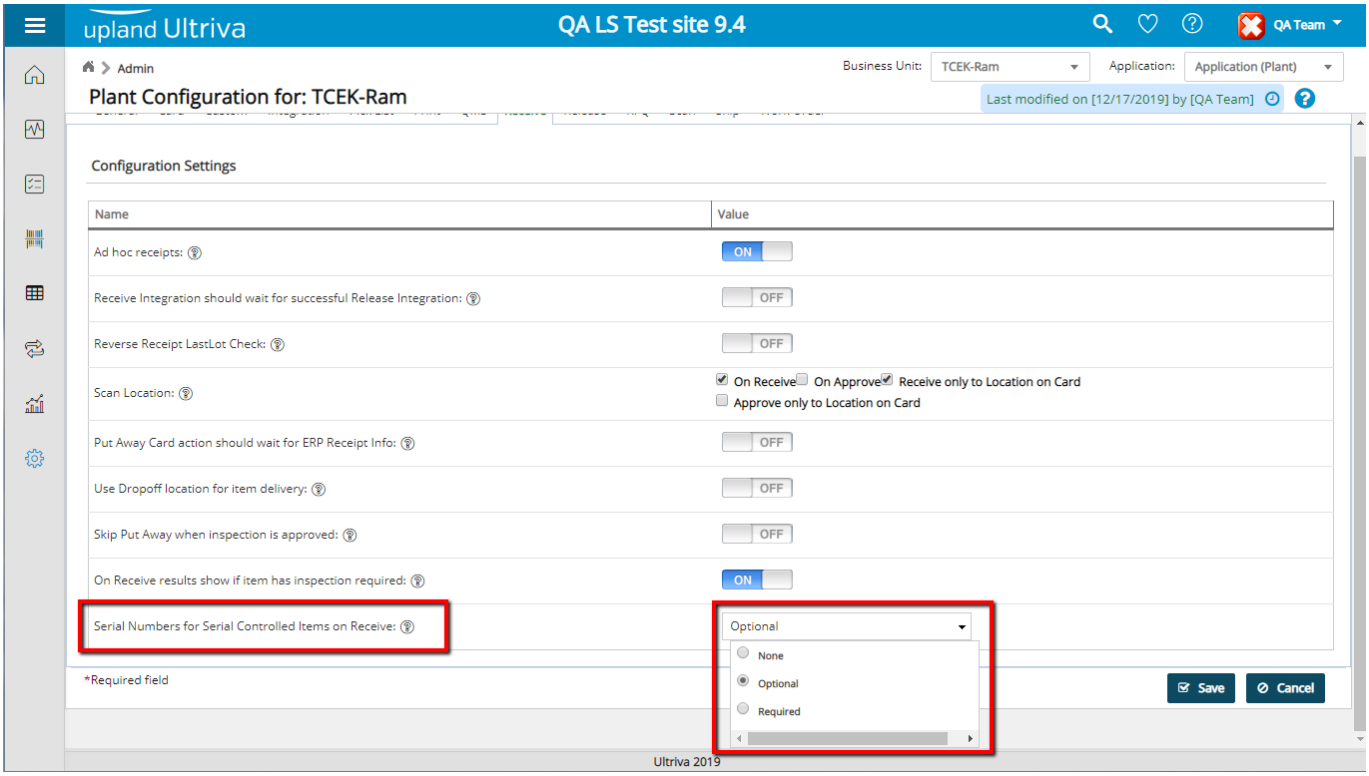

On Workcenter side there is an extra option to allow Inheritance from plant, this is the default value for workcenters and if this is selected, value from plant will be used on workcenter receive cards screen.

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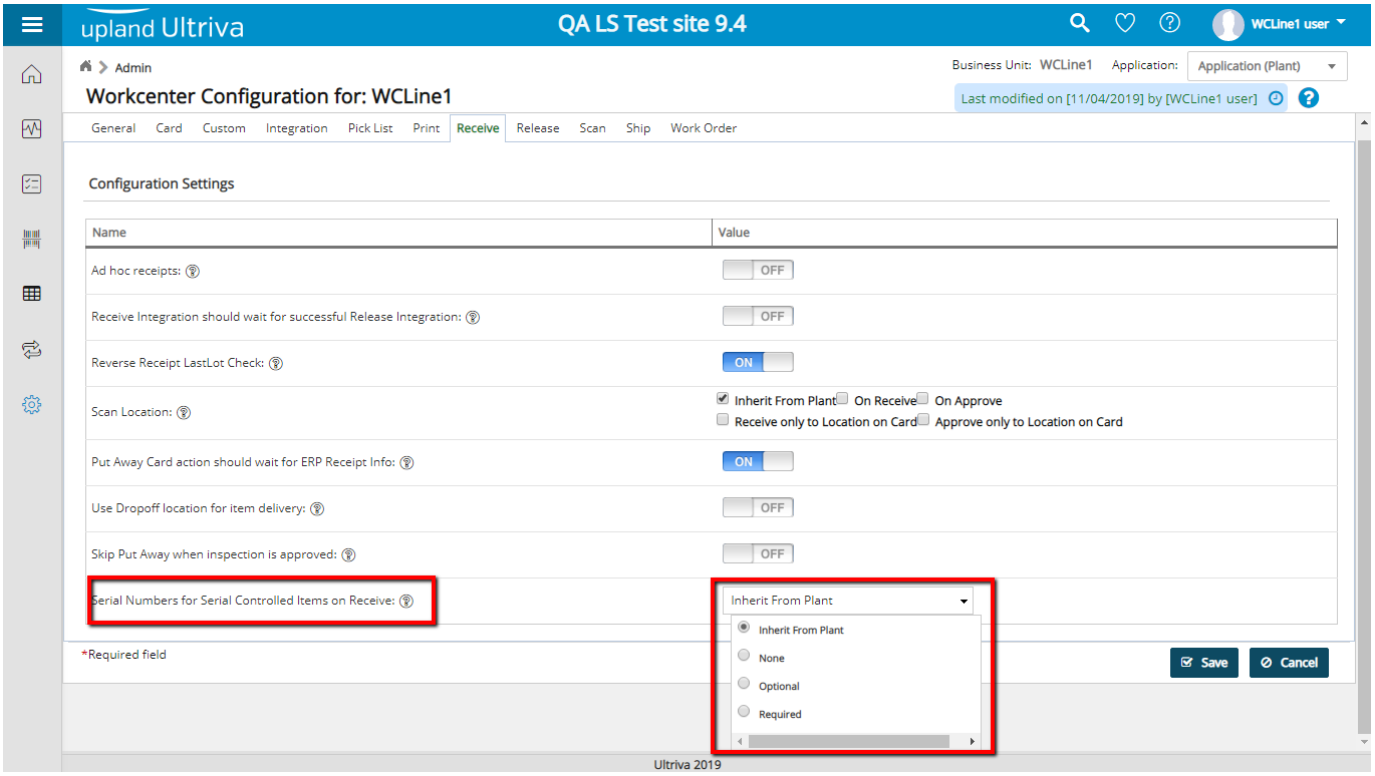
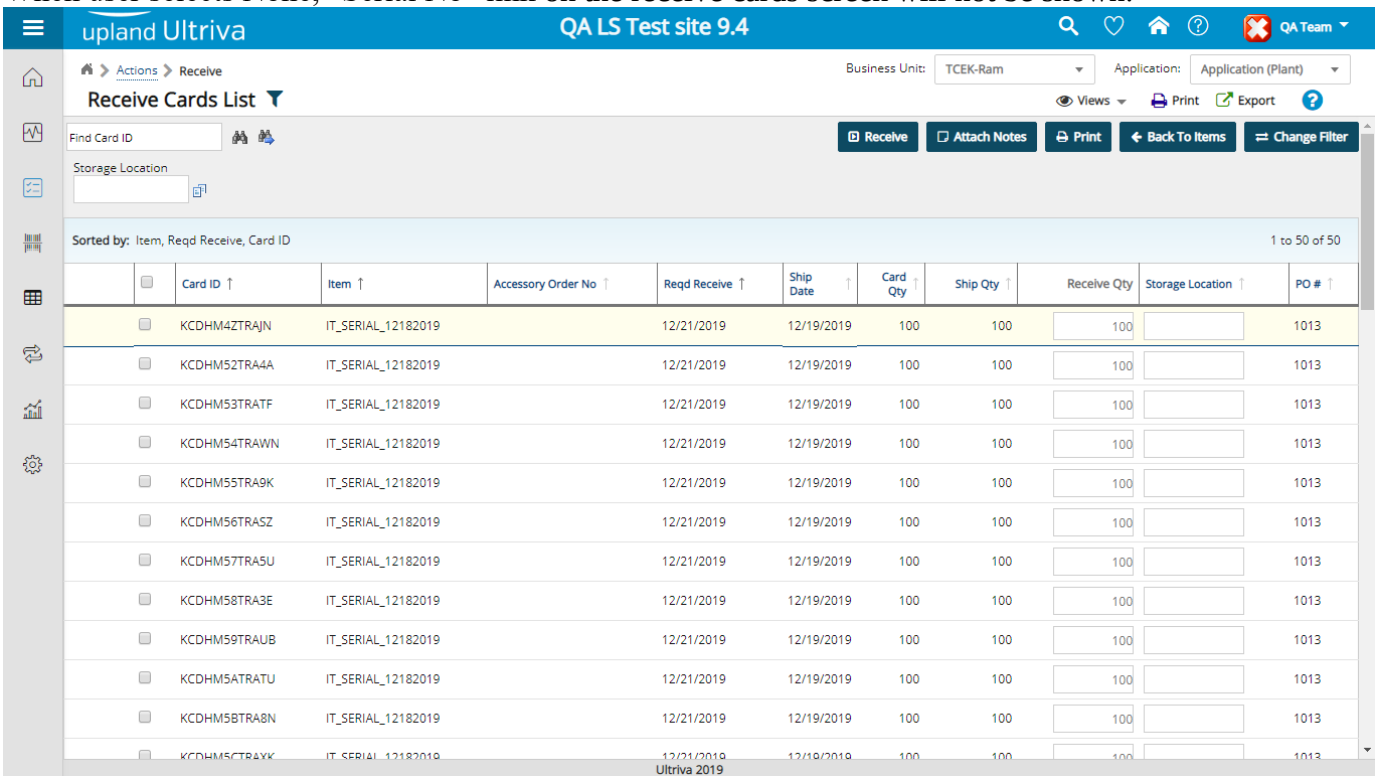


When user selects None, “Serial No” link on the receive cards screen will not be shown.



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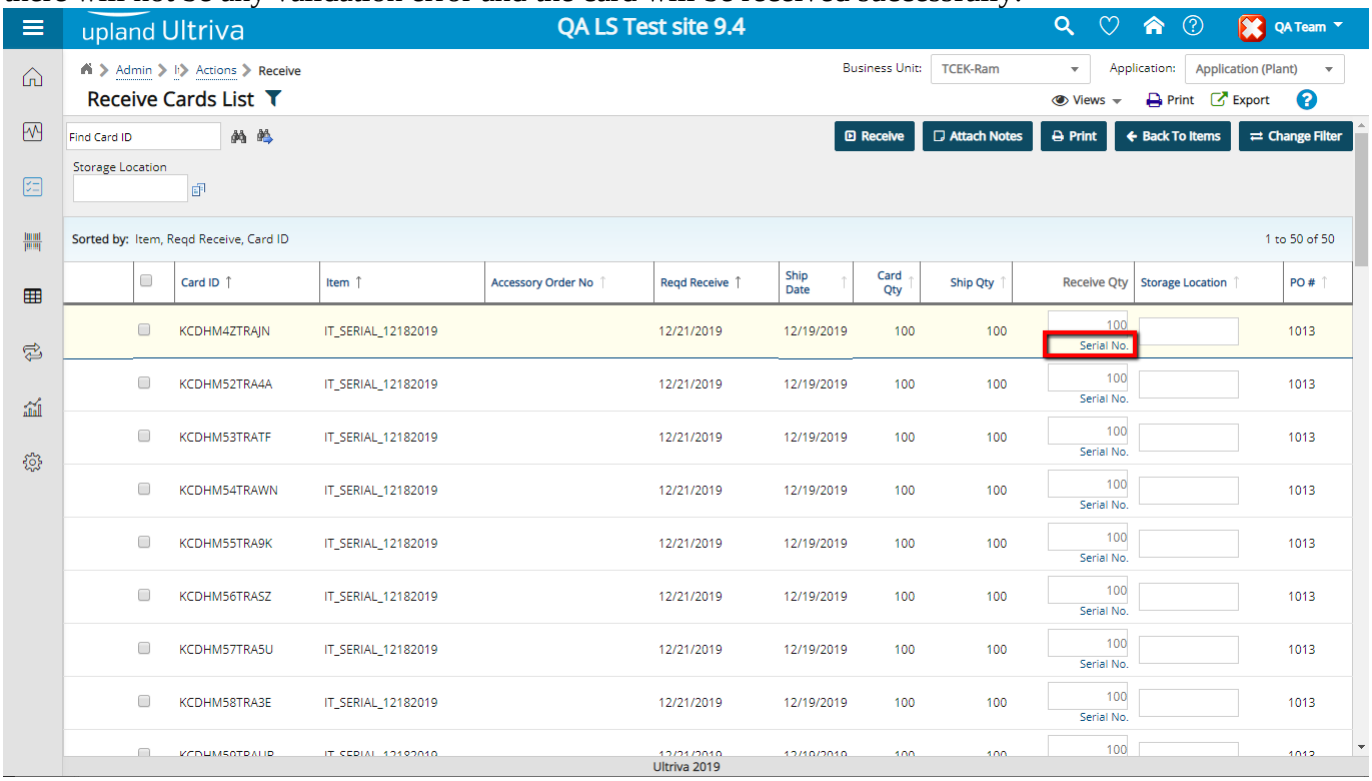
When user selects Optional, “Serial No” link will be displayed on Receive Cards screen. Users can set serial number(s) for cards (this is not mandatory). If case user is not entering serial number(s), there will not be any validation error and the card will be received successfully.



When user selects Required, “Serial No” link will be displayed on Receive Cards screen. Users have set serial number(s) for cards. In case user is not entering serial number(s), they will get a validation error on screen for each card with invalid serial numbers and cards won’t be received until those errors are fixed.

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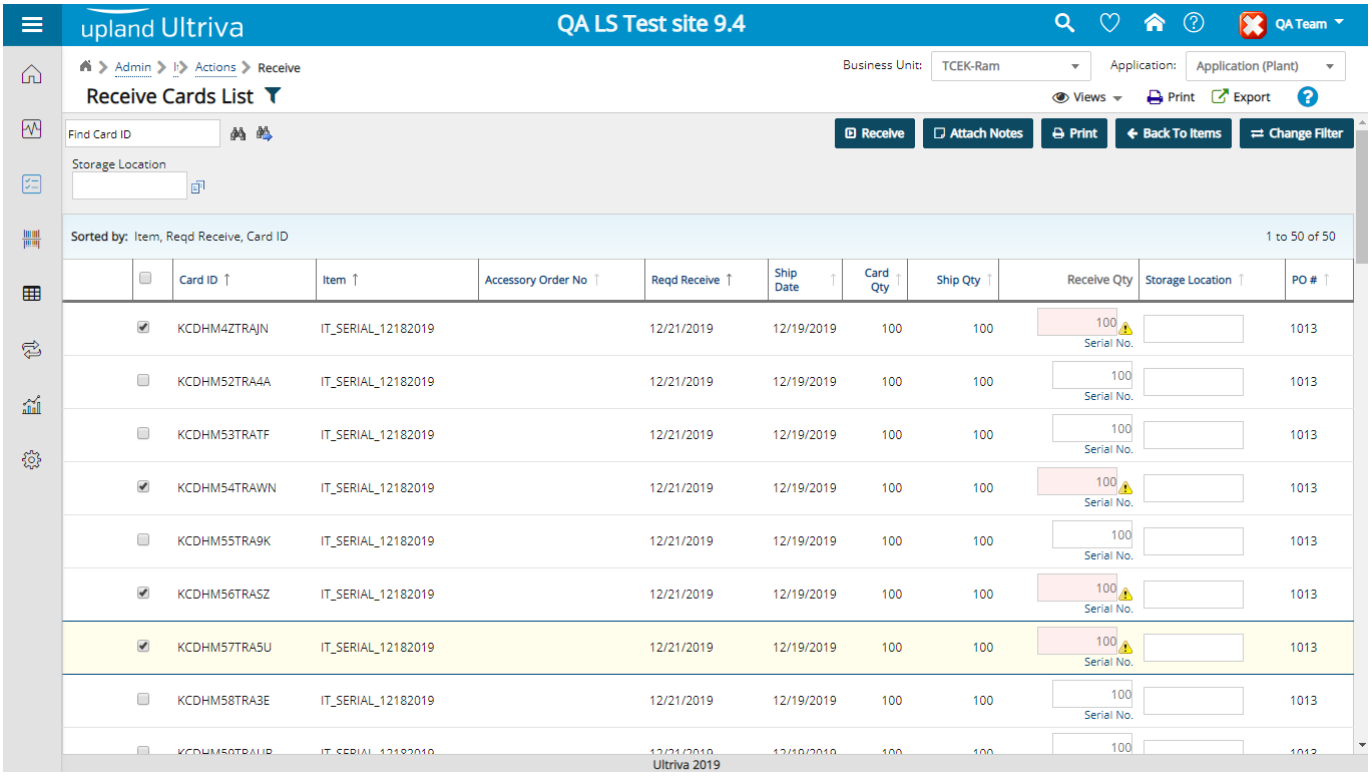
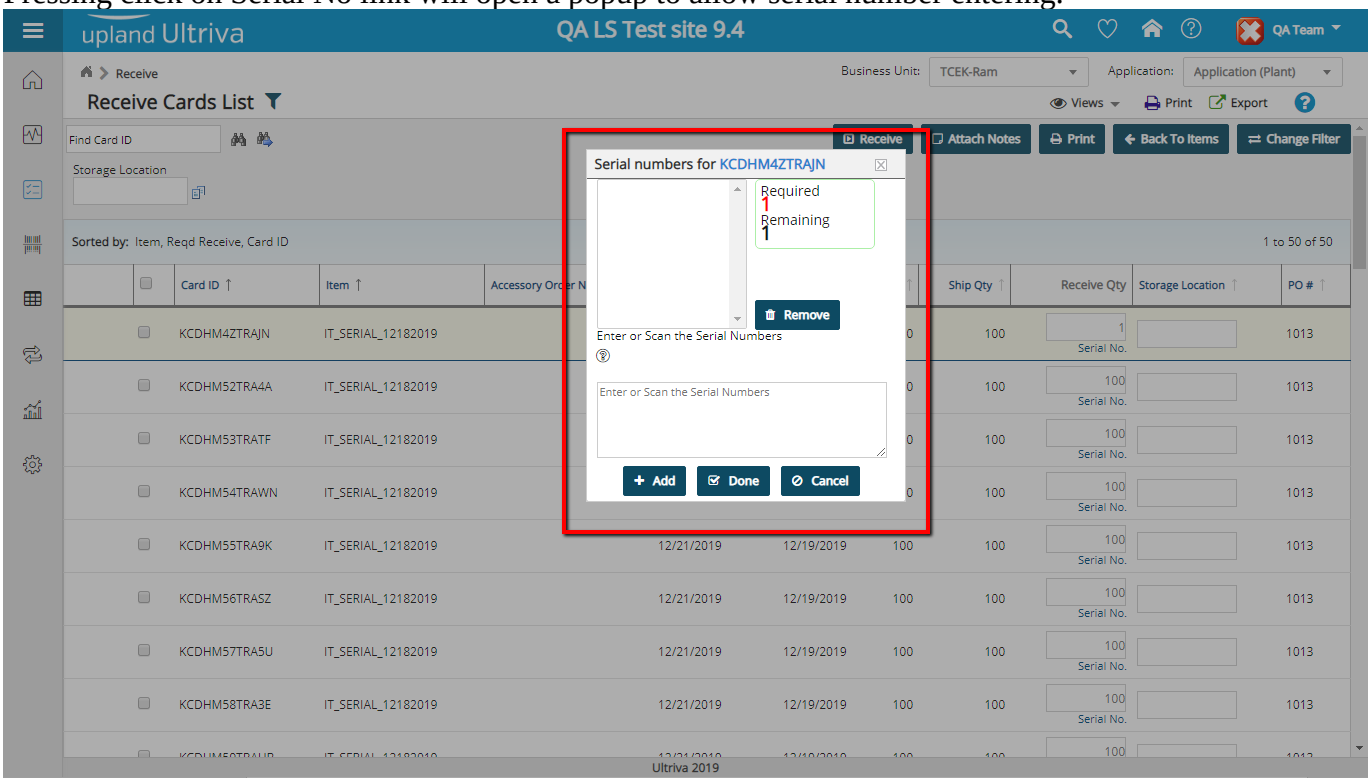


Pressing click on Serial No link will open a popup to allow serial number entering.



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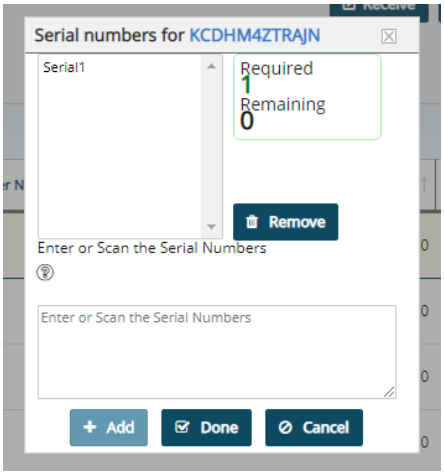
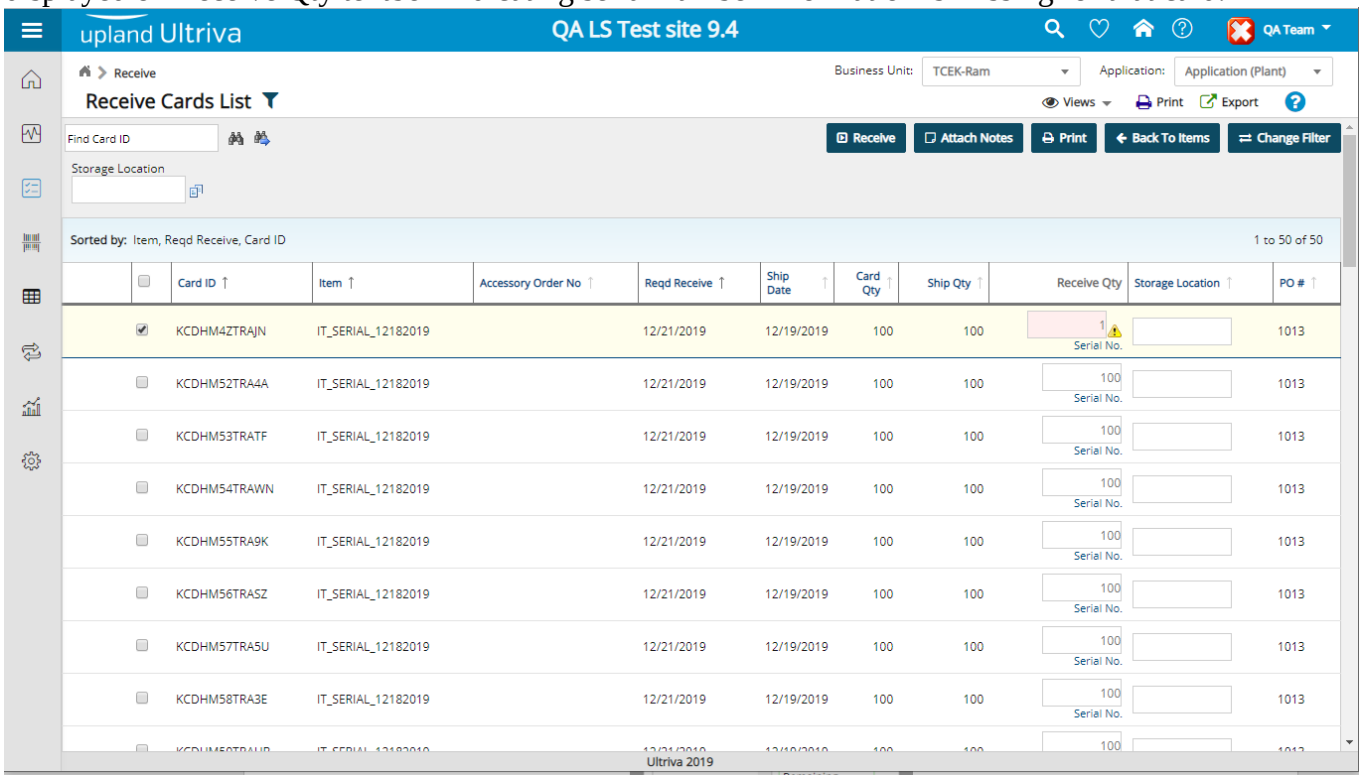
The quantity of serial numbers should be the same value set for receive quantity. This popup allows user to enter each serial number. When remaining quantity is 0, Add button will be locked and done button should be clicked.



If Done button is clicked and serial number was not entered, validation warning message will be displayed on Receive Qty textbox indicating serial number information is missing for that card.



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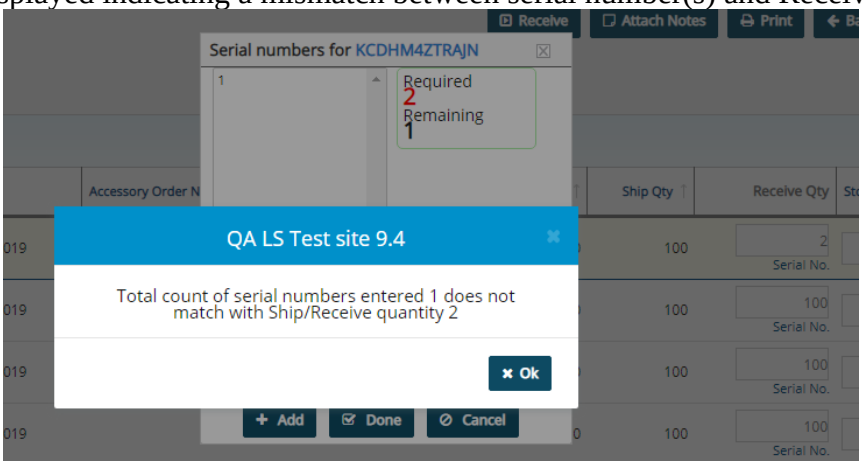
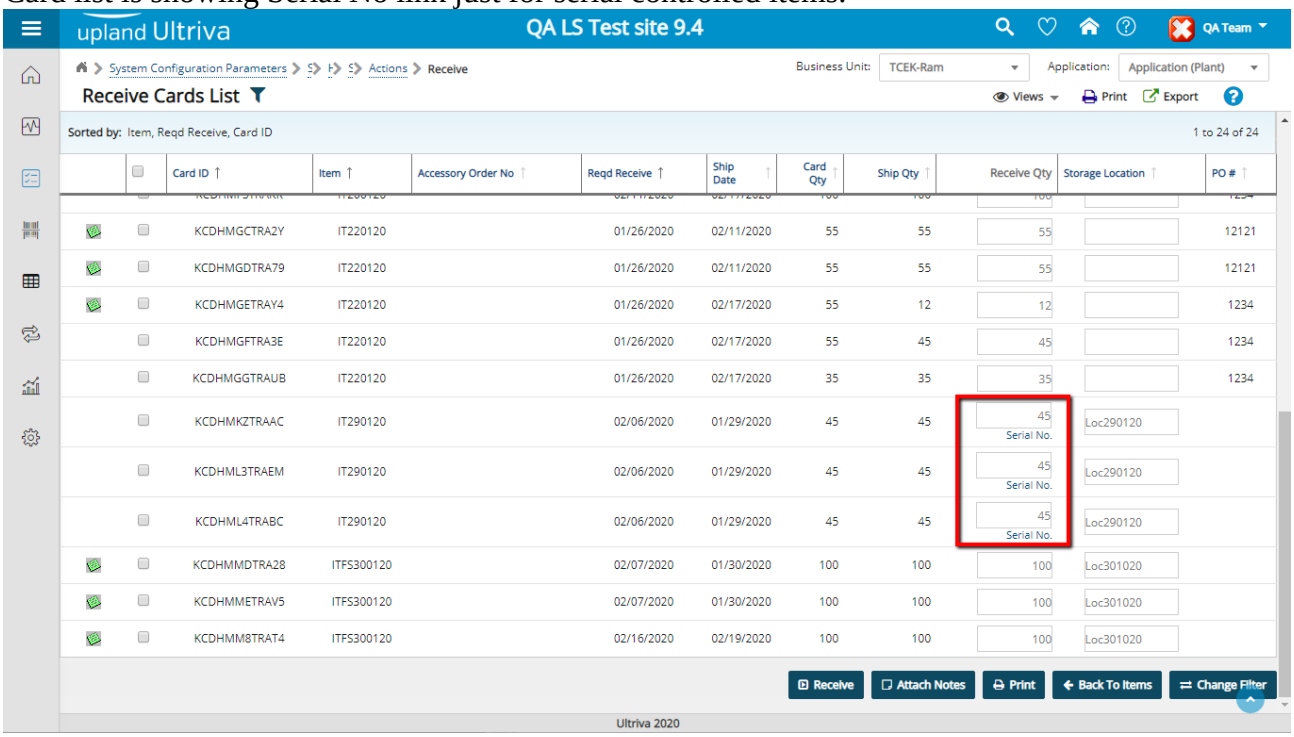
When entered serial numbers quantity does not match with Receive Qty and Done button is clicked, popup will be displayed indicating a mismatch between serial number(s) and Receive Qty.



Card list is showing Serial No link just for serial controlled items.



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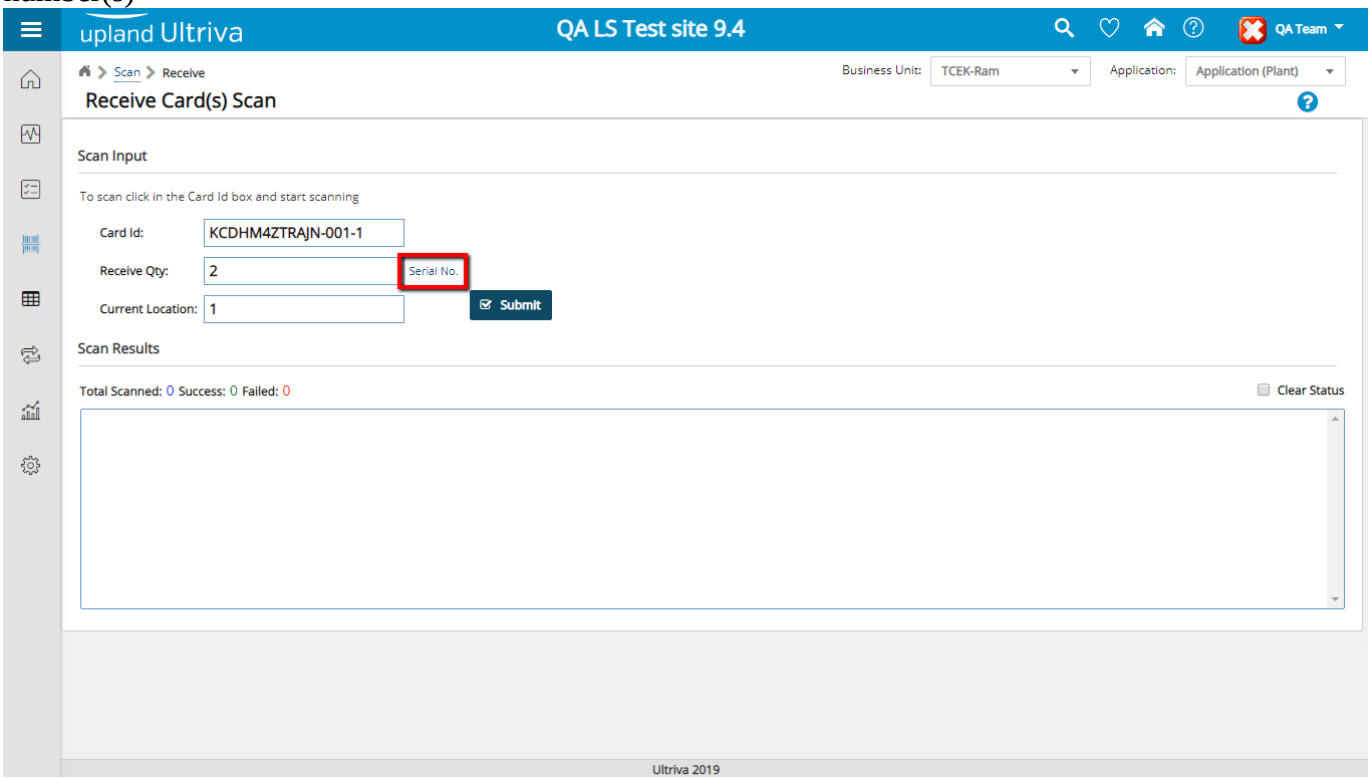
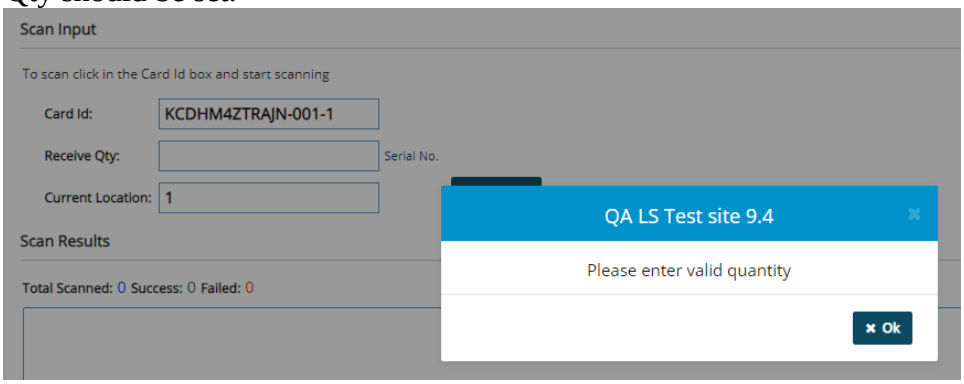
1.5.2 Receive Scan

For Single Scan, Serial No link was added next to Receive Qty textbox to allow user to set serial number(s)



If Receive Qty is not set and Serial No link is clicked, warning popup will be displayed indicating that Receive Qty should be set.



When Receive Qty is set, Serial Number(s) popup is displayed allowing users to set serial number(s)

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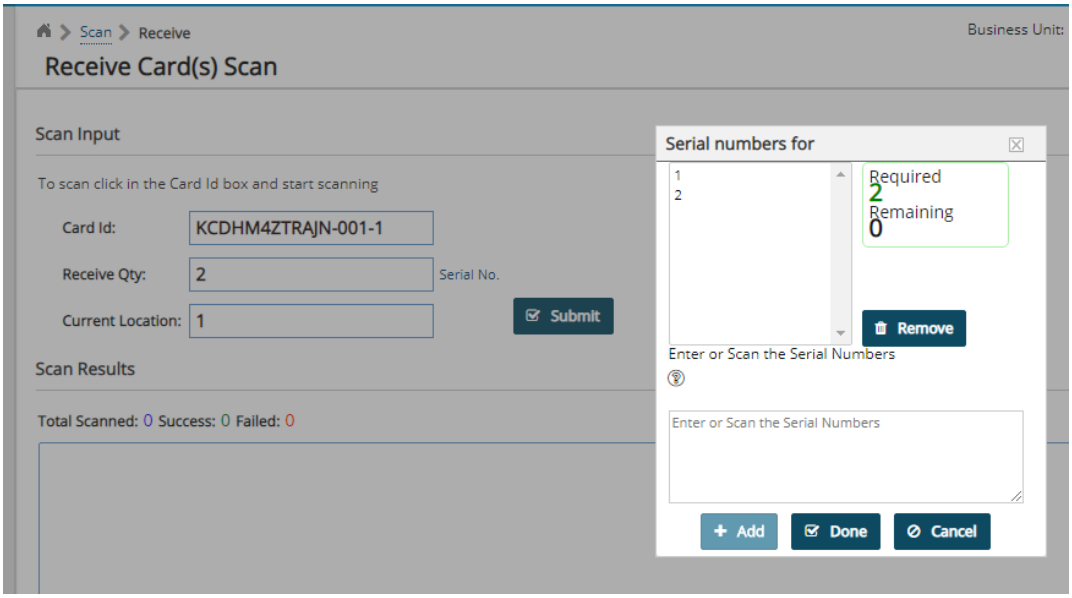
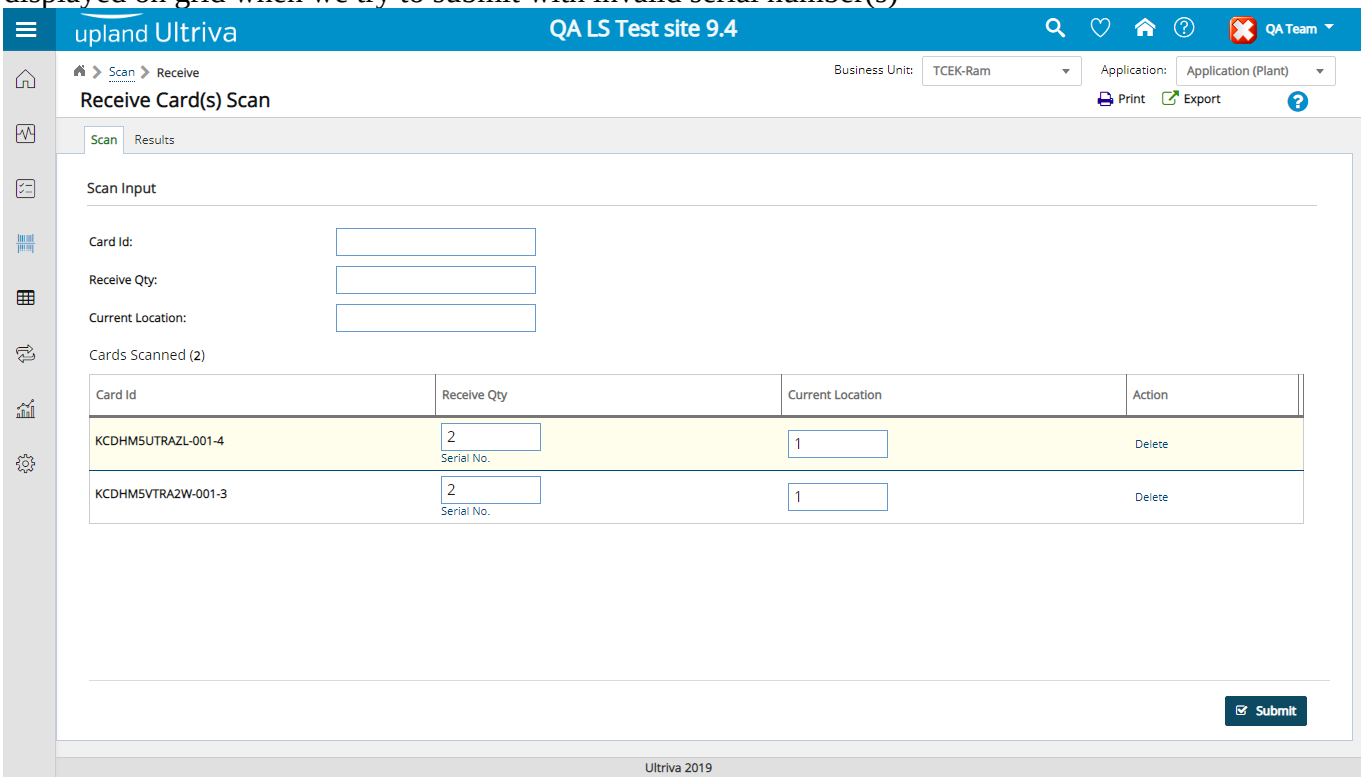


For Multiple Cards Scan, Serial No link is displayed for each scanned card, validation error will be displayed on grid when we try to submit with invalid serial number(s)



Business unit configuration value (None, Optional, Required) is handled with the same logic on Scan/Receive Cards list.

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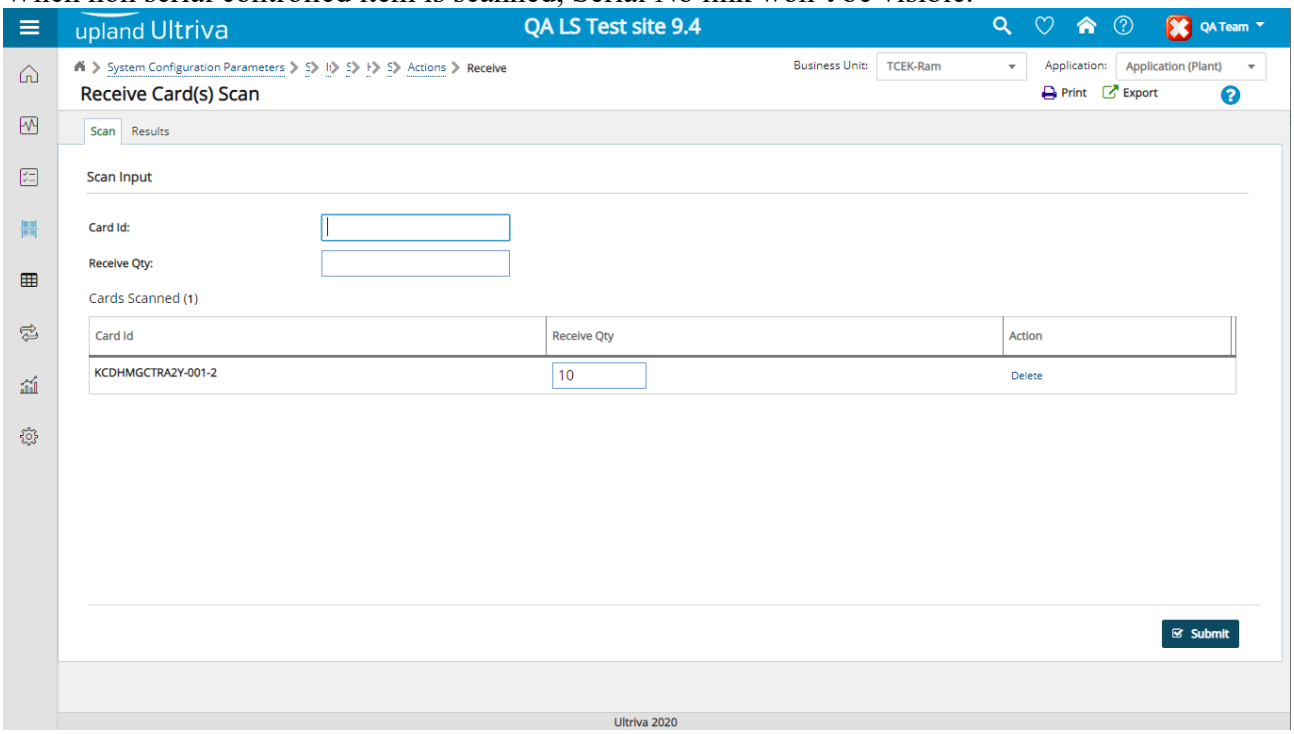
When non serial controlled item is scanned, Serial No link won't be visible.



1.5.3 PO Receipt Integration job from Ultriva to ERP

https://help.ultrivalms.com/docs/html/6d94c818-1aa0-422c-a564-54cbab78ce82.htm

This is a DataOut job allowing user to create file with PO information including Lot or Serial Number(s) information. If user entered X quantity of serial number(s) on receive, he will get X lines for the same card with the Serial information. To configure field on job configuration. "VendorLotNo" field has the Serial Number stored on database, this field should be added to job configuration.

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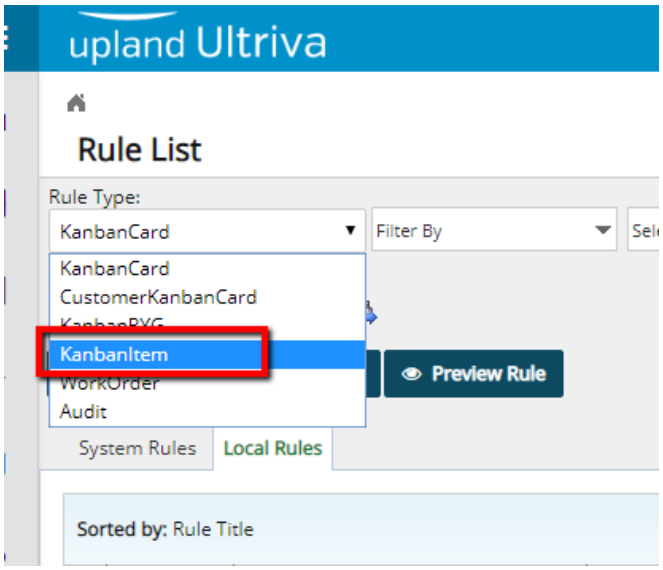
1.6 Add A New Rule Template to notify when the Blanket PO Expires.

Rule for Expired Blanket Pos:
New rule was required to send alert to user when PO Blanket End Date expires n X days. User will be able to configure rule setting number of days.
Steps to configure

1. On Rule list, new Rule type was added (KanbanItem)



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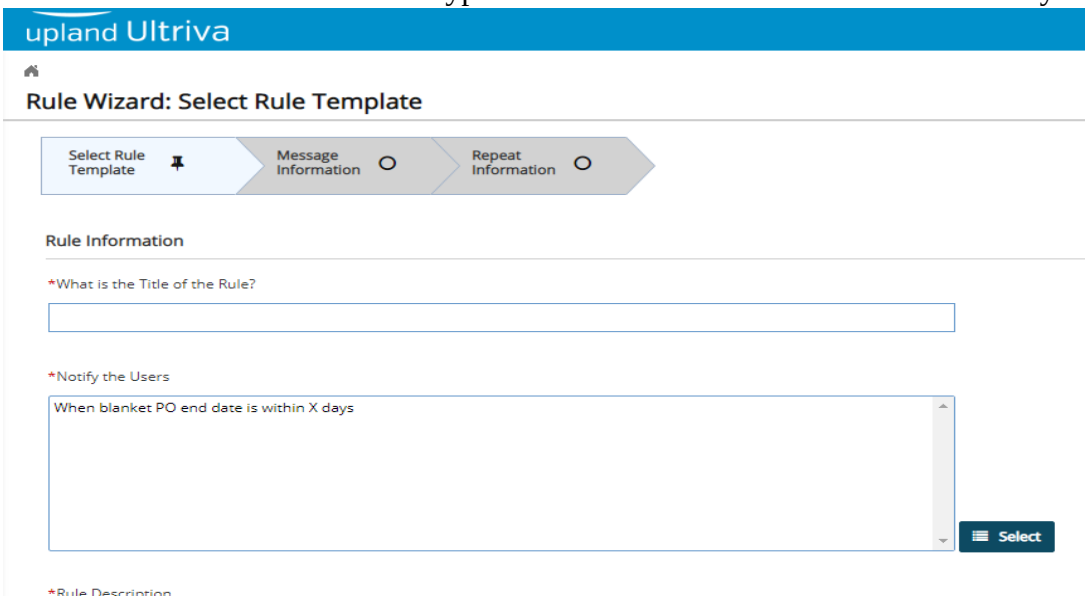
2. New rule is available for the new type: When blanket PO end date is within X days



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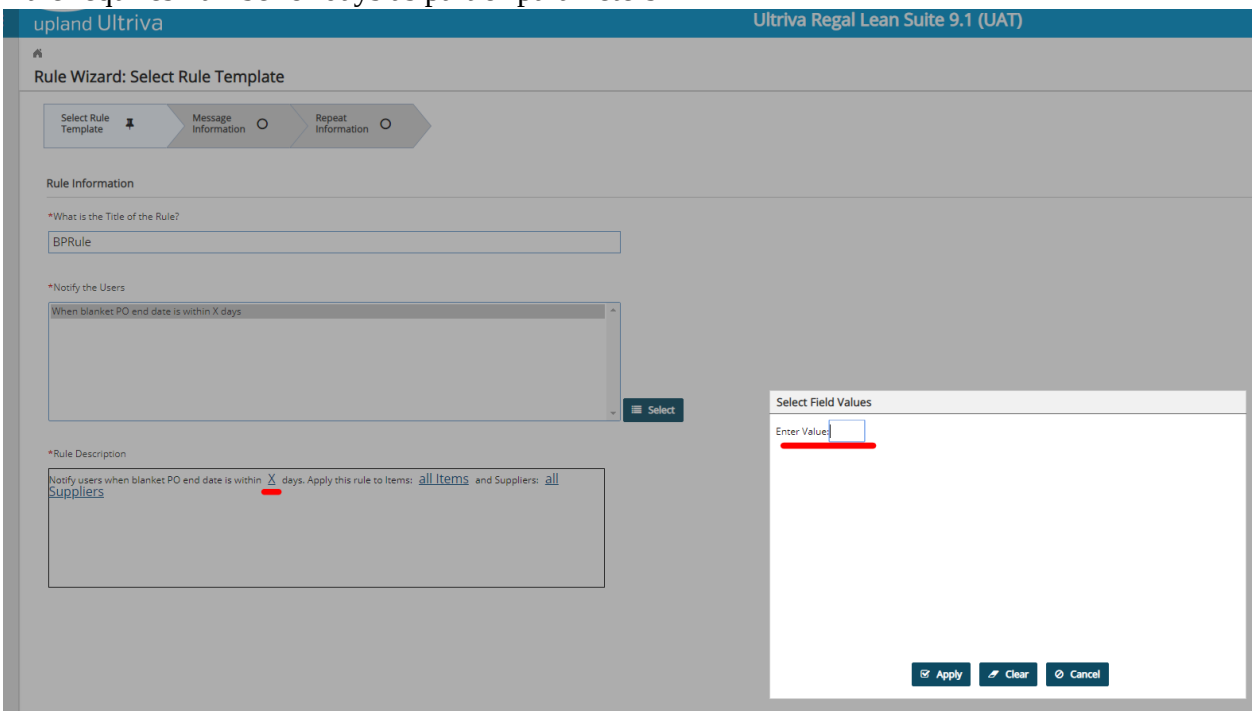
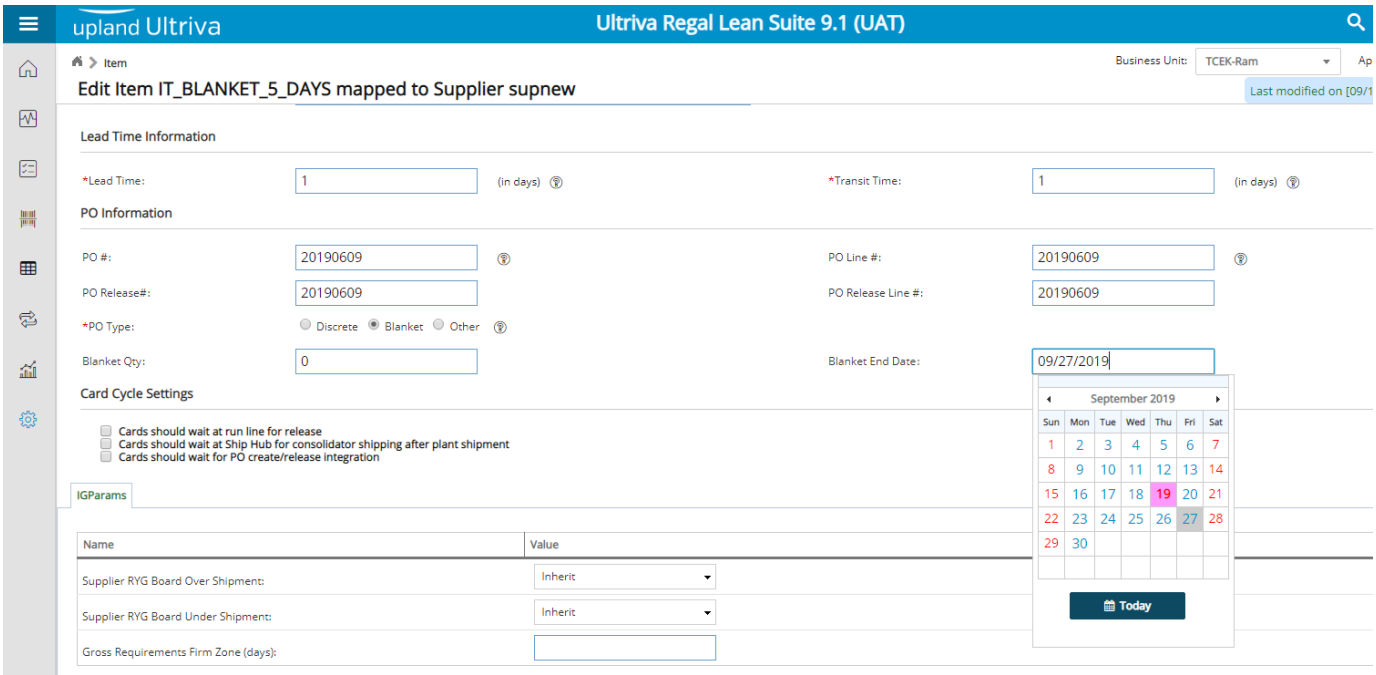
3. Rule requires number of days as part of parameters



4. After rule is created, each time we set PO Blanket End Date on Item 2 Supplier page, we will fire rule if it is satisfied.



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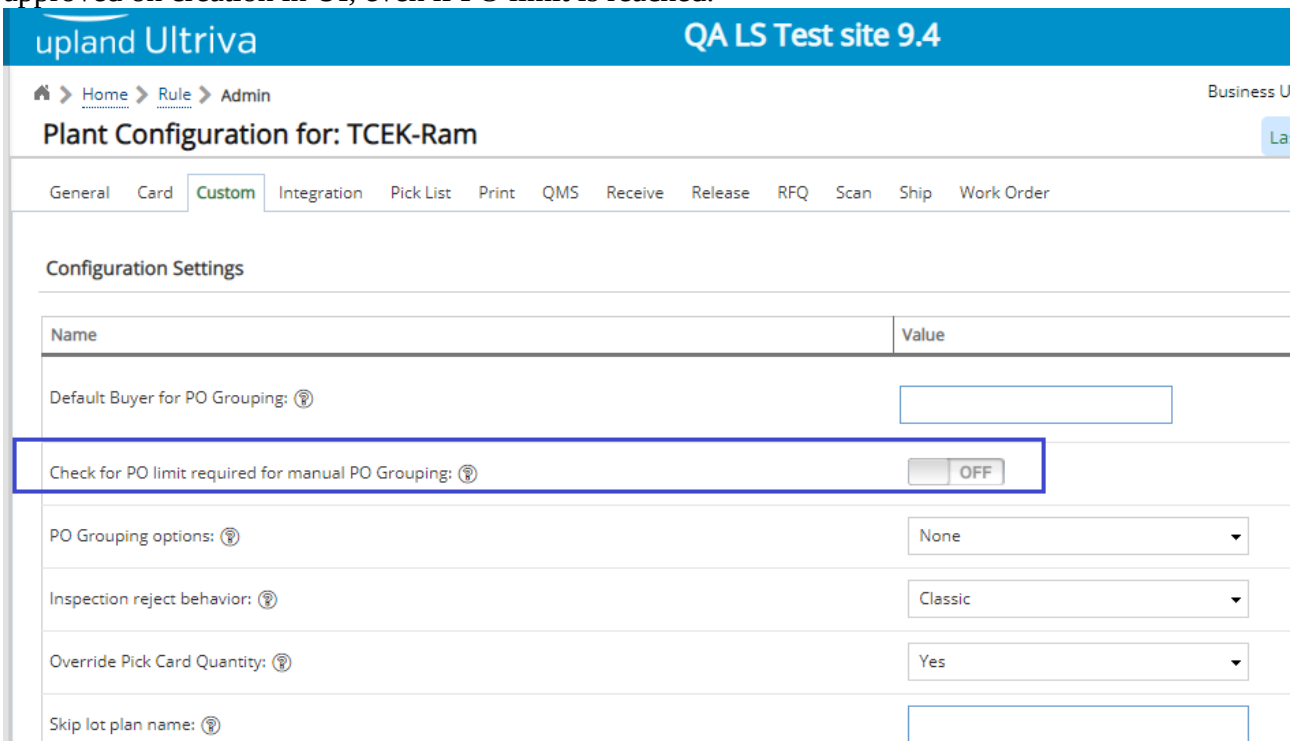
5. New notifications will be delivered X days before the PO Blanket End Date.
   e.g.
   PO Blanket End Date = 09/30/2019
   Notification Date = 09/18/2019

   Holidays and non-working days will be considered.

1.7 PO Grouping enhancements

1.7.1 Approval as custom Config on PO Grouping

New Setting added under Plant Custom business unit configuration.
Setting Name: Check for PO limit required for manual PO Grouping
Default Value: N, When this setting is set to N, it means all PO Groupings will be auto approved on creation in UI, even if PO limit is reached.



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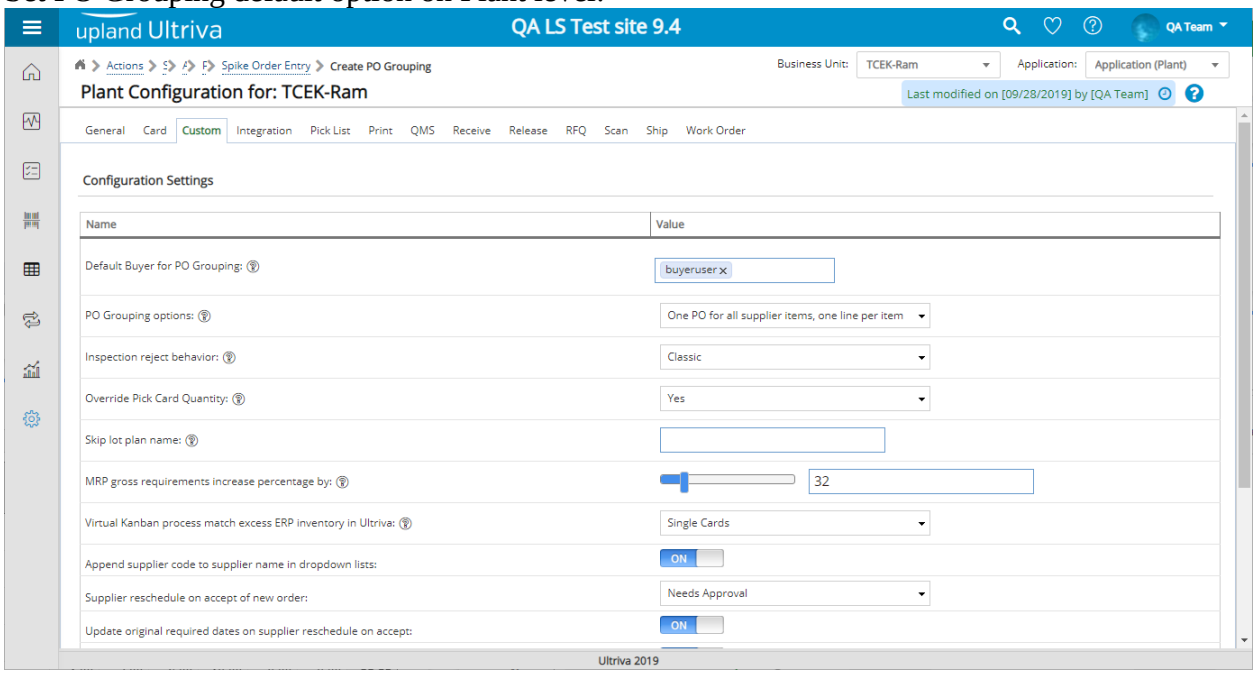
1.7.2 PO Grouping option at Supplier level

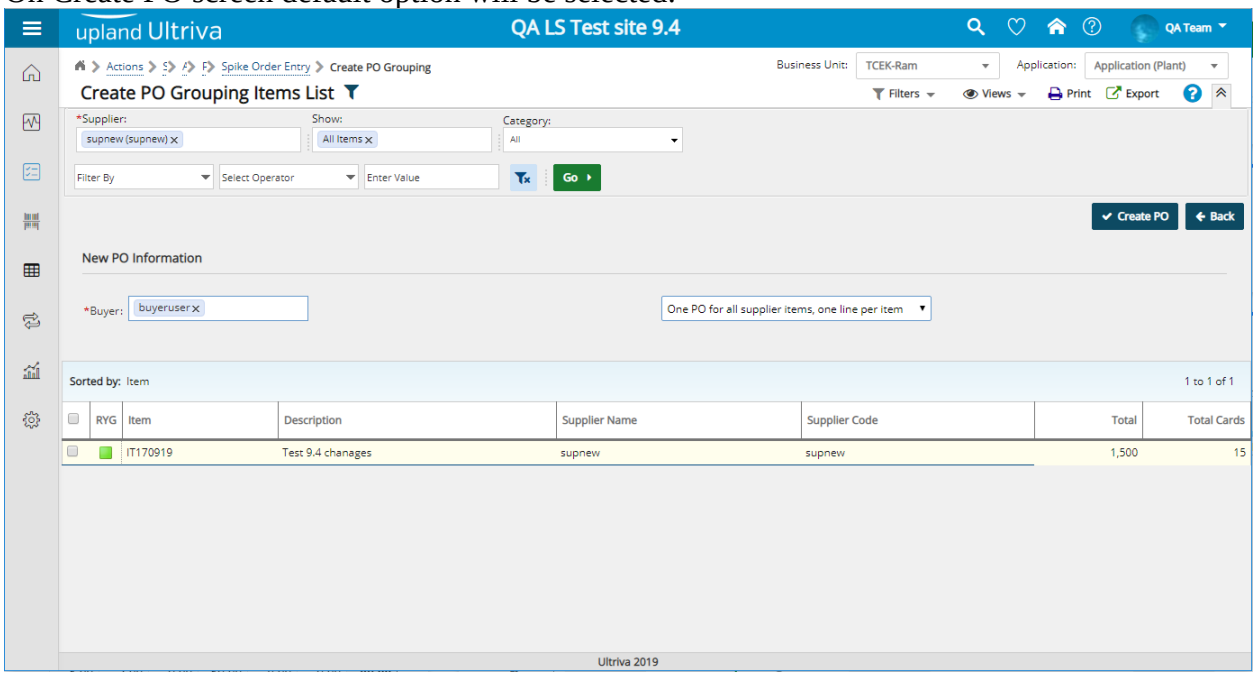
Set PO Grouping default option on Plant level:



Help message:

PO Grouping options. Selected option will be used in auto PO Grouping process.

On Create PO screen default option will be selected:



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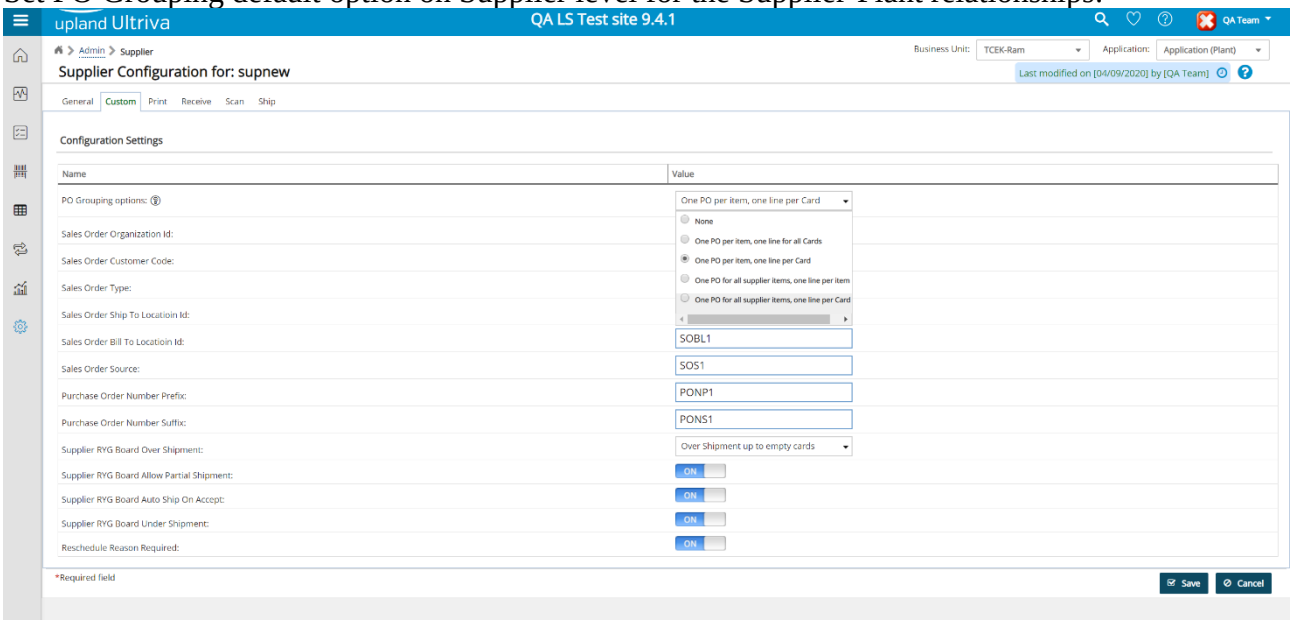
Set PO Grouping default option on Supplier level for the Supplier-Plant relationships:



Tooltip:
“May be set at Plant level or under Supplier configuration if the Supplier has a different preference for grouped POs. NOTE: Supplier must be setup for the Plant in order to use PO Grouping options settings. PO Grouping options set at Work Center will be ignored.”

PO grouping batch job runs on Plant level, PO Grouping settings exists only on Plant level. Supplier’s selected grouping option has to be setup on Plant to Supplier configuration, will be ignored for WC to Supplier configuration.

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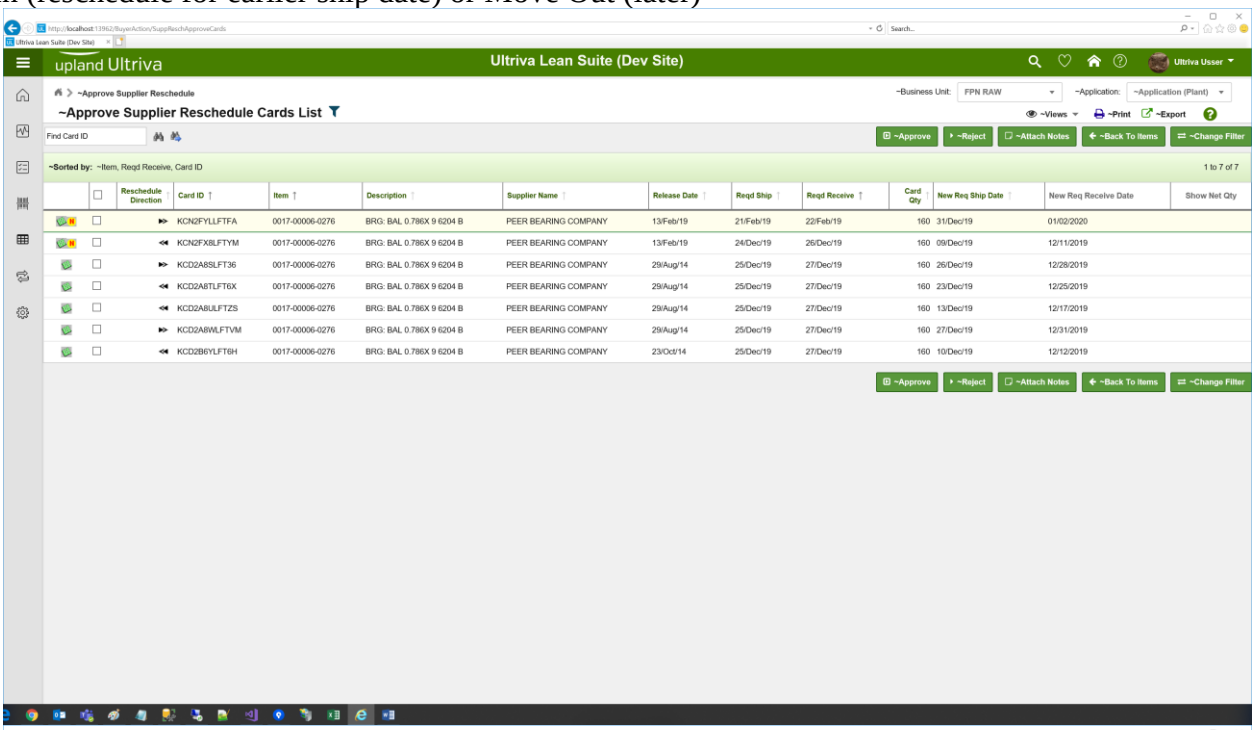
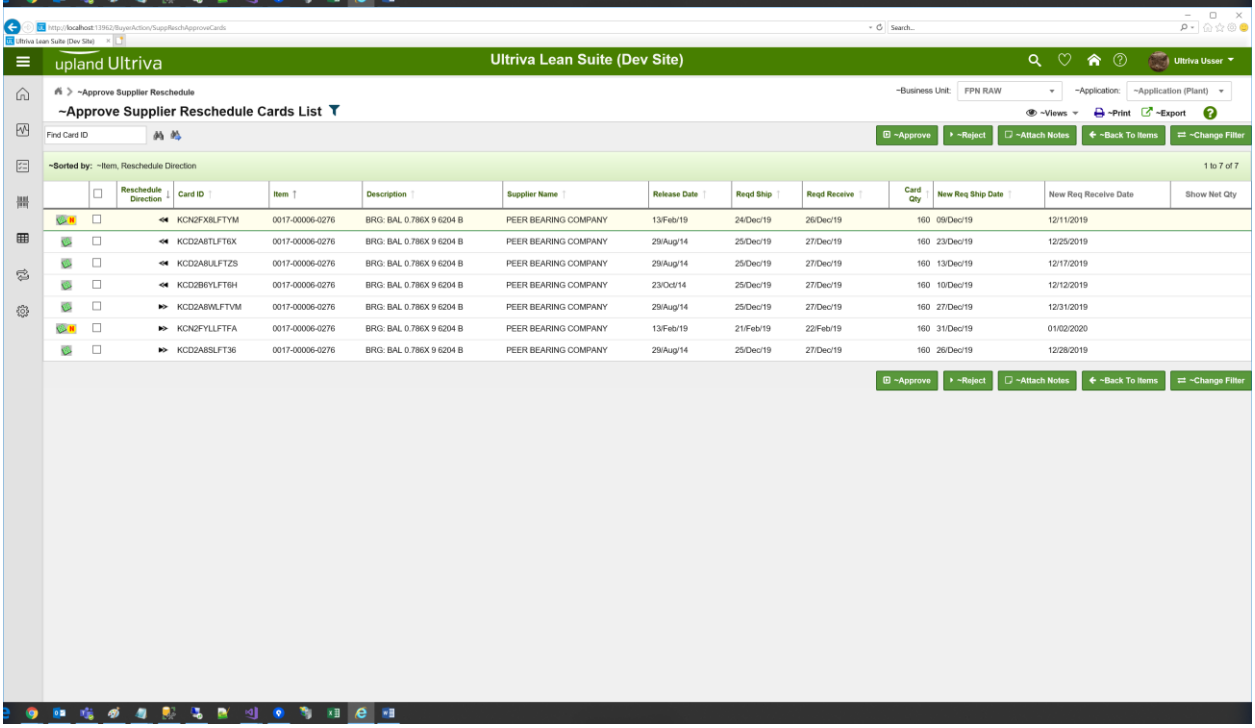
1.8 On Reschedule Approval Pages add indicator for reschedule direction

Buyer Approves Supplier's reschedule – added Reschedule direction
Cards list: In the grid we show image with tooltip to indicate reschedule direction as Move In (reschedule for earlier ship date) or Move Out (later)





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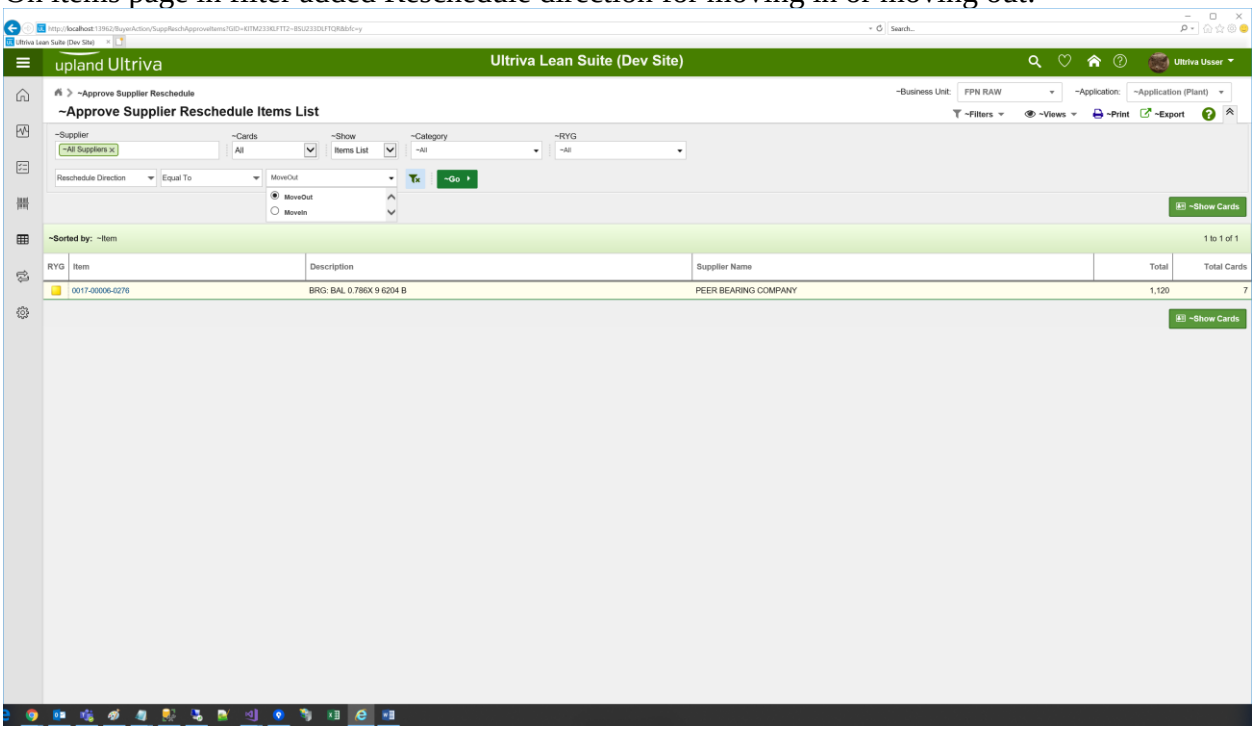
-
- On items page in filter added Reschedule direction for moving in or moving out:



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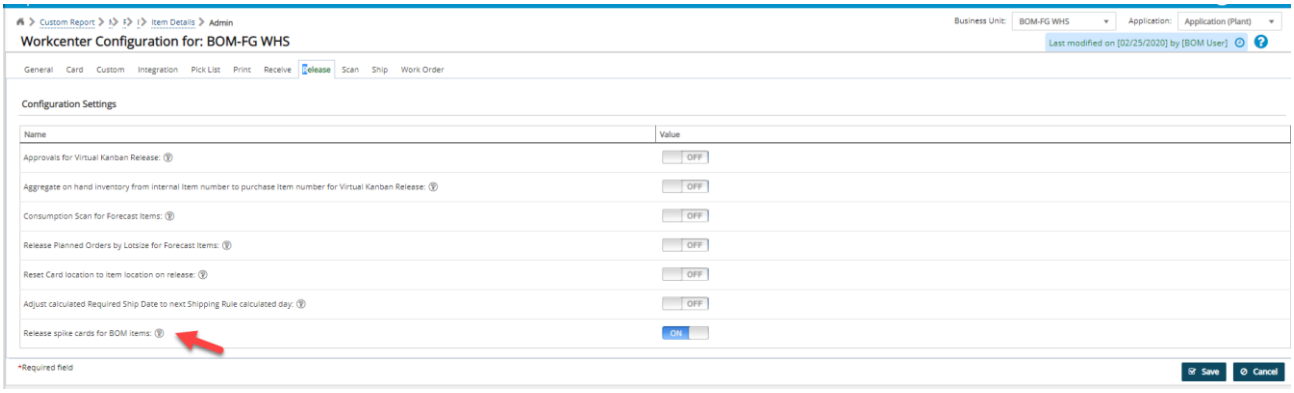
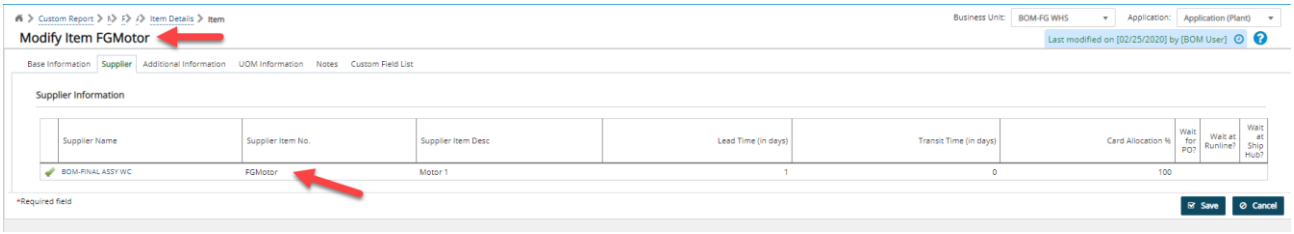
1.9 BOM Item Spike Order Generation

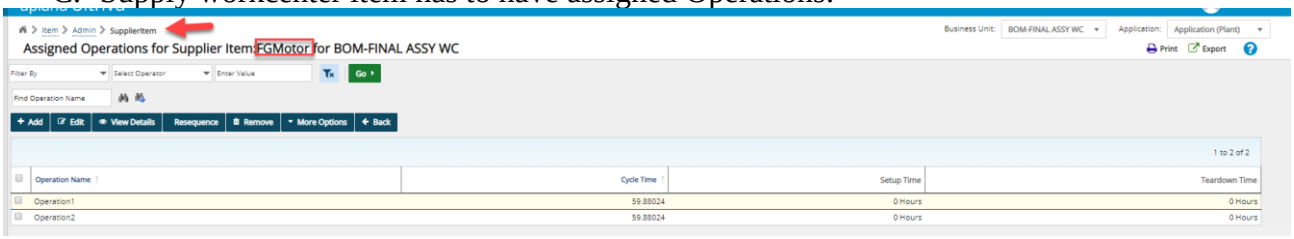
A. New Business Unit setting for releasing spike cards for BOM items, this needs to be turned on for Consuming workcenter and for other business units that need to generate spike orders for the BOM.



B. Cards for the item FGMotor will be released to supplier BOM-Final Assy WC.



C. Supply workcenter item has to have assigned Operations.



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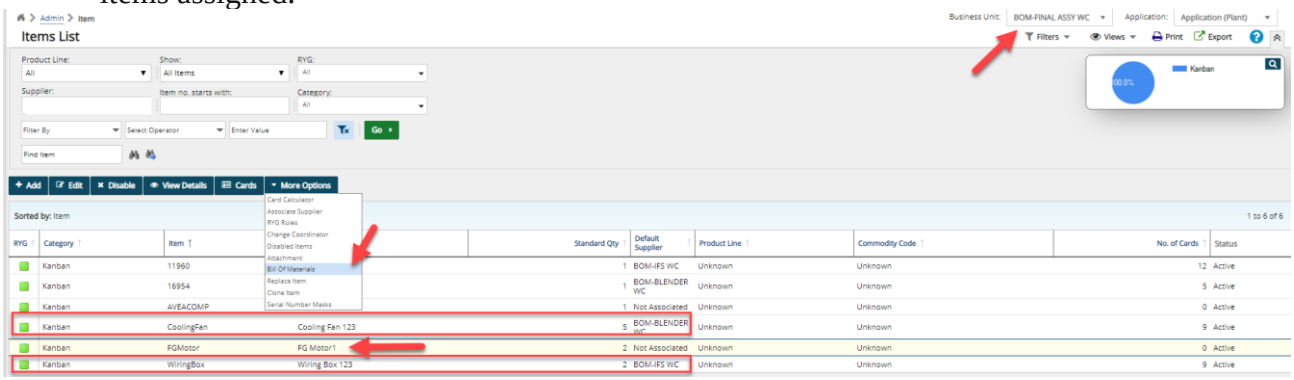
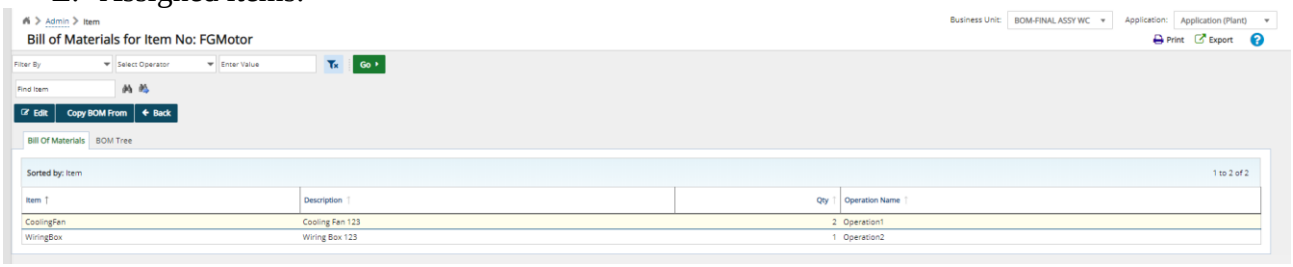
D. Supply workcenter must have the item set up with the same item number with the BOM items assigned.

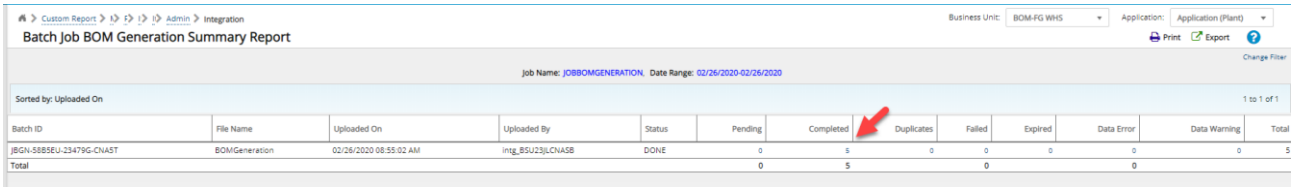


E. Assigned items.



F. BOM Integration Batch Job

- On Accept, if any supplier item has defined BOM items this will create data for JOBBOMGeneration to use.
- The integration task for JobBOMGeneration has to be setup for each consuming Business Unit.
- Release spike cards configuration for BOM items needs to be on.
- Batch job setup:
    - This is a DataIn job to Ultriva and the ftp must contain valid information so that no errors are generated in the log file. No file is expected to be processed though and the actions taking place occur based the accept action event.
    - When the job runs, new spike cards are created and released for quantity equal to order quantity times BOM item quantity.
    - There are a few details on the Batch job summary report after the task runs.



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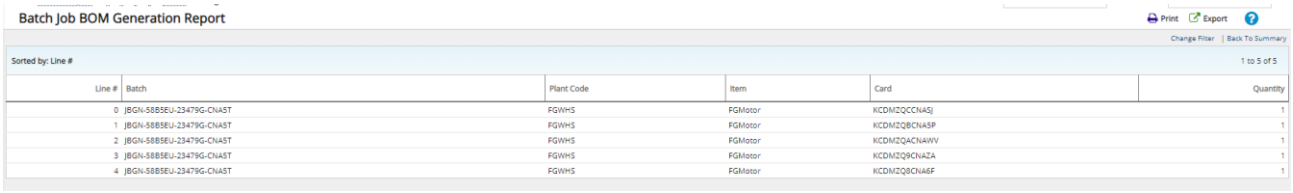
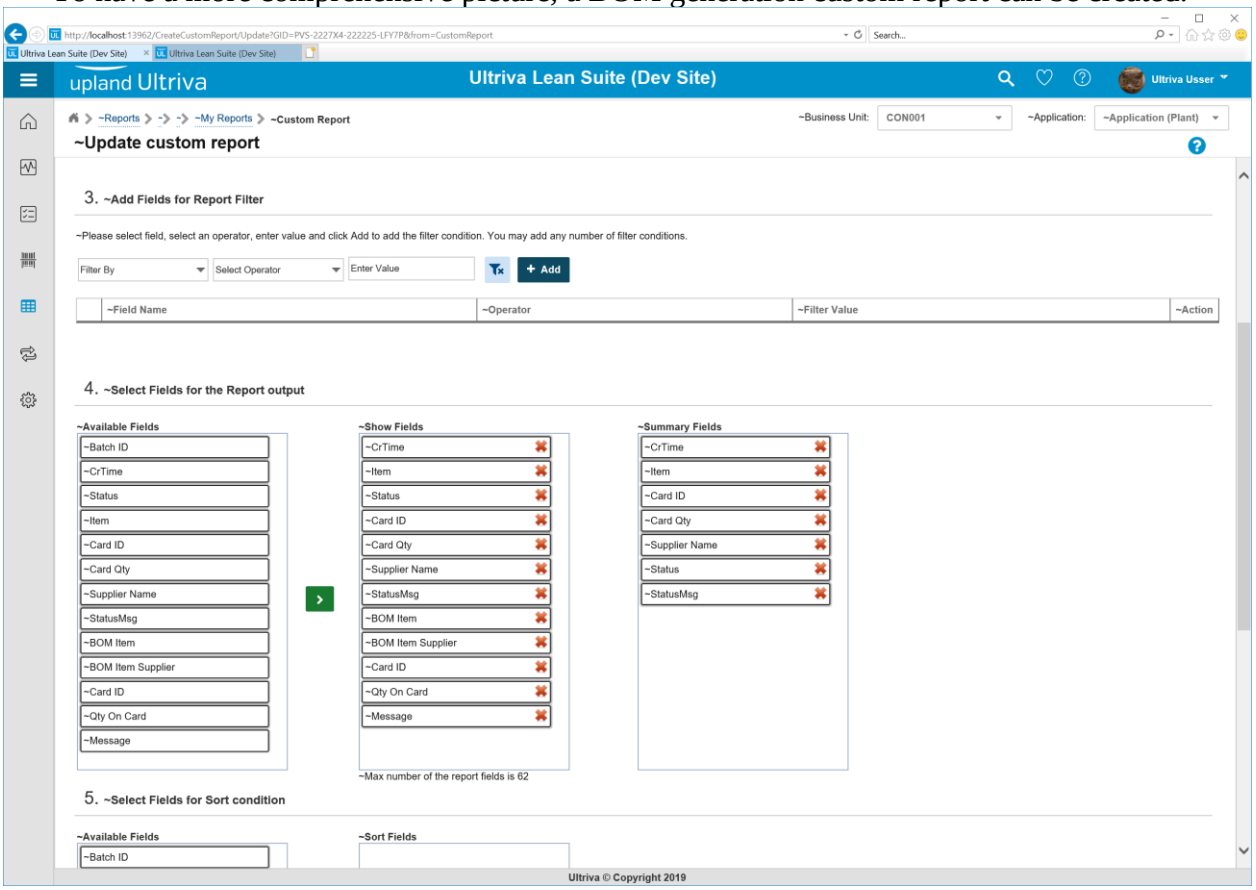


G. BOM generation custom report

To have a more comprehensive picture, a BOM generation custom report can be created.



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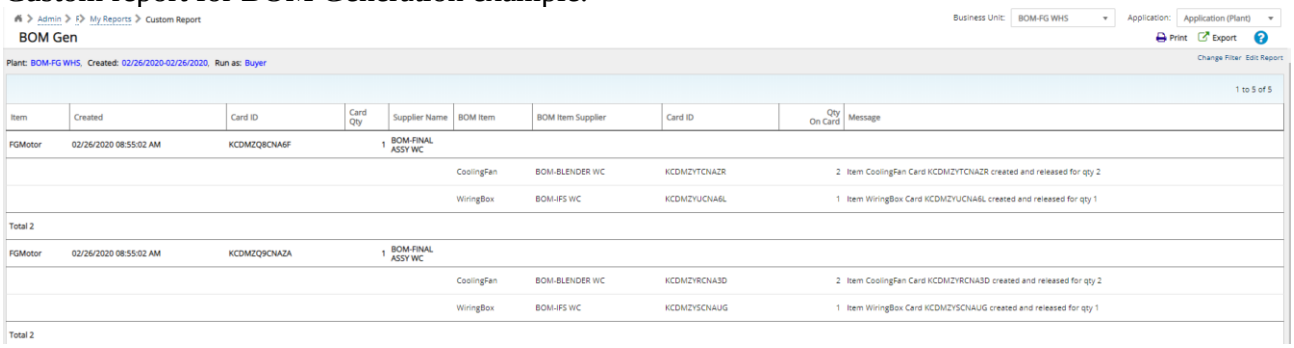
Custom report for BOM Generation example.



Admin > My Reports > Custom Report

Business Unit: BOM-FG WHS Application: Application (Plant)

BOM Gen

Print Export

Plant: BOM-FG WHS, Created: 02/26/2020-02/26/2020, Run as: Buyer

Change Filter Edit Report

1 to 5 of 5

Item	Created	Card ID	Card Qty	Supplier Name	BOM Item	BOM Item Supplier	Card ID	Qty On Card	Message
FGMotor	02/26/2020 08:55:02 AM	KCDMZQ8CNA6F	1	BOM-FINAL ASSY WC					
					CoolingFan	BOM-BLENDER WC	KCDMZYTCNAZR	2	Item CoolingFan Card KCDMZYTCNAZR created and released for qty 2
					WiringBox	BOM-IFS WC	KCDMZYUCNA6L	1	Item WiringBox Card KCDMZYUCNA6L created and released for qty 1
Total 2									
FGMotor	02/26/2020 08:55:02 AM	KCDMZQ9CNAZA	1	BOM-FINAL ASSY WC					
					CoolingFan	BOM-BLENDER WC	KCDMZYRCNA3D	2	Item CoolingFan Card KCDMZYRCNA3D created and released for qty 2
					WiringBox	BOM-IFS WC	KCDMZYSCNAUG	1	Item WiringBox Card KCDMZYSCNAUG created and released for qty 1
Total 2									

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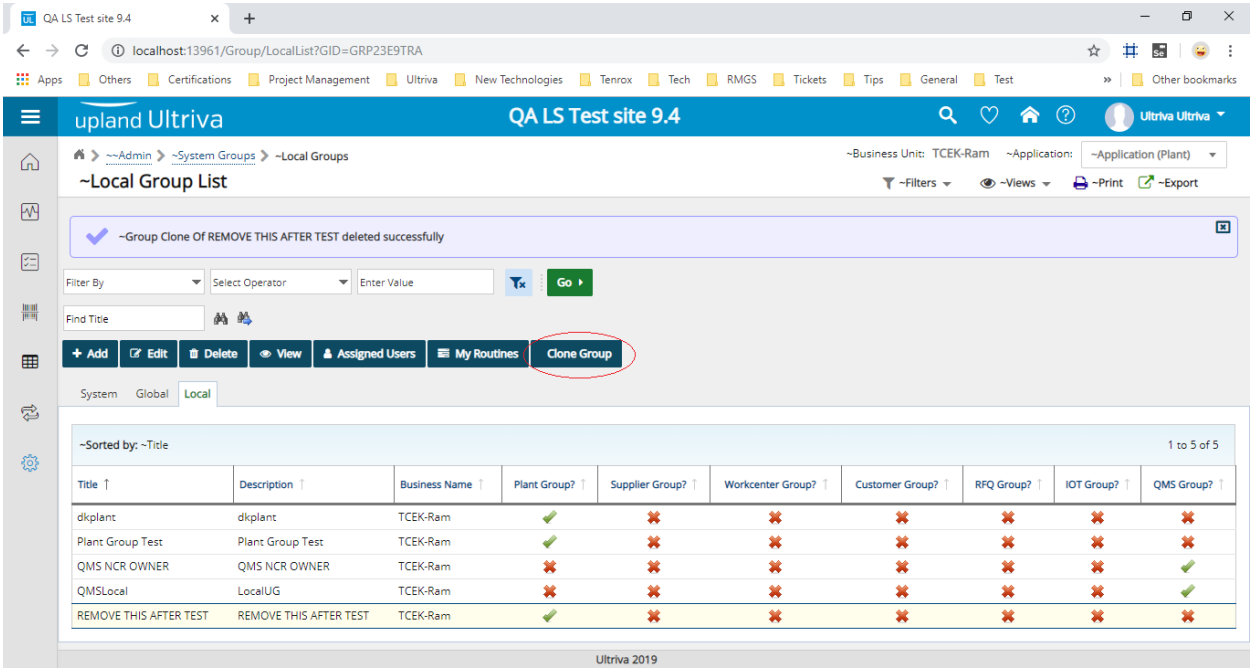
1.10 Ability to Clone a User Group

New Feature added to clone existing user group. In users group list page added new button “Clone Group” in toolbar.

Highlight the group you wish to have a copy of then click Clone Group.



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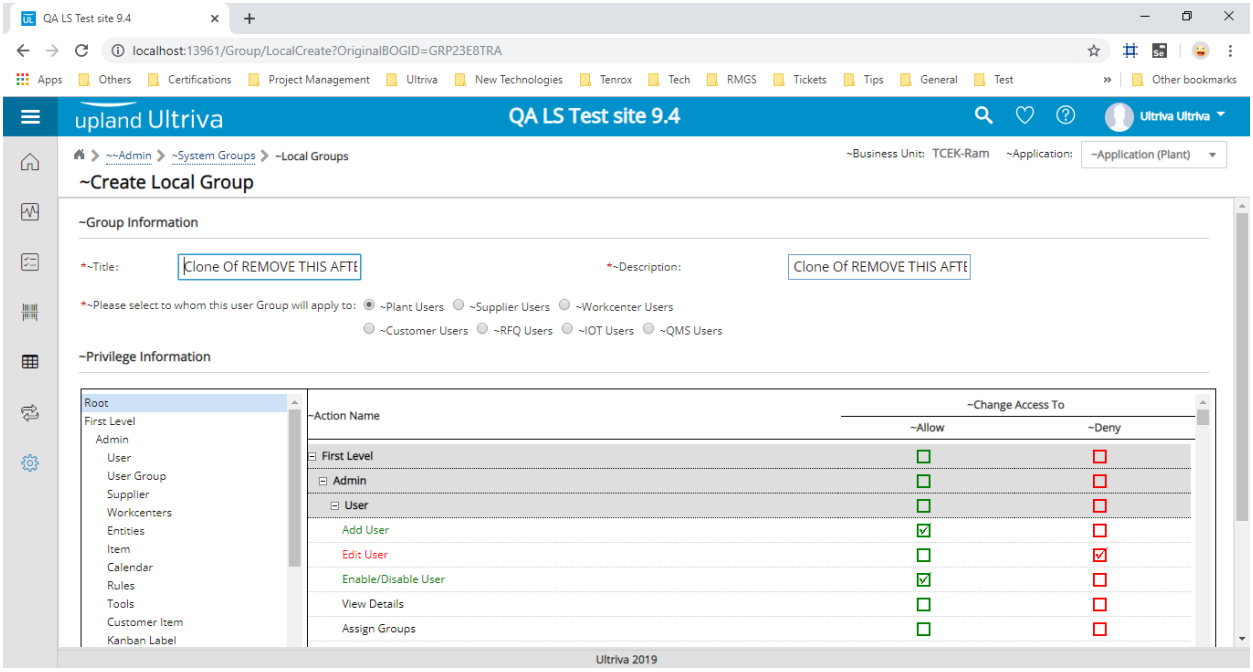
The new group is available to edit with “Clone of” in the title, the new group is now available to edit then save.



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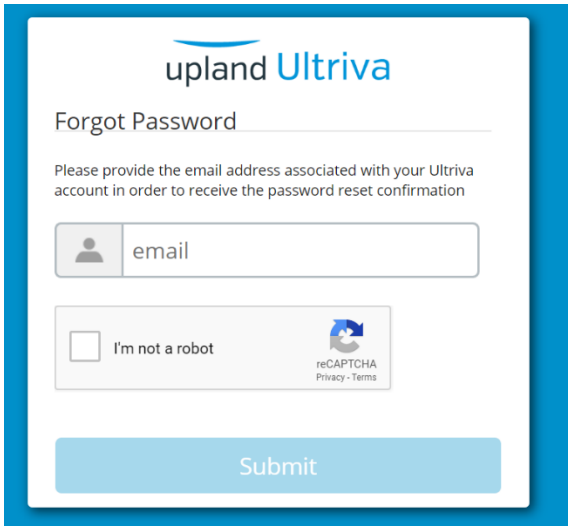
1.11 Forgot Password Functionality

Forgot password link added at log in screen. This feature is available only for users with valid emails in Ultriva.

Enter email address and confirm that you are not a robot.



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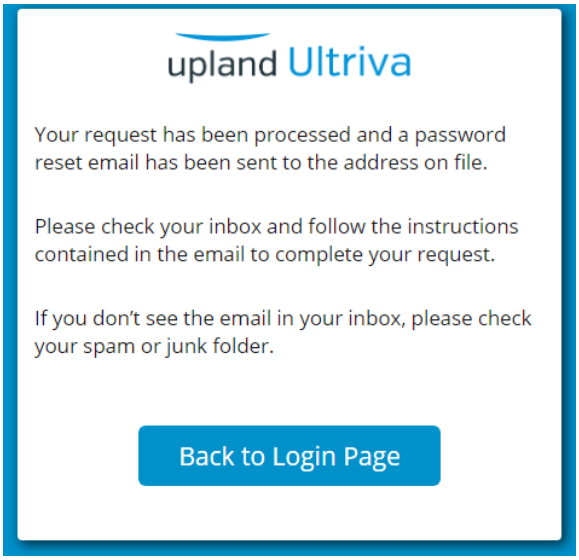
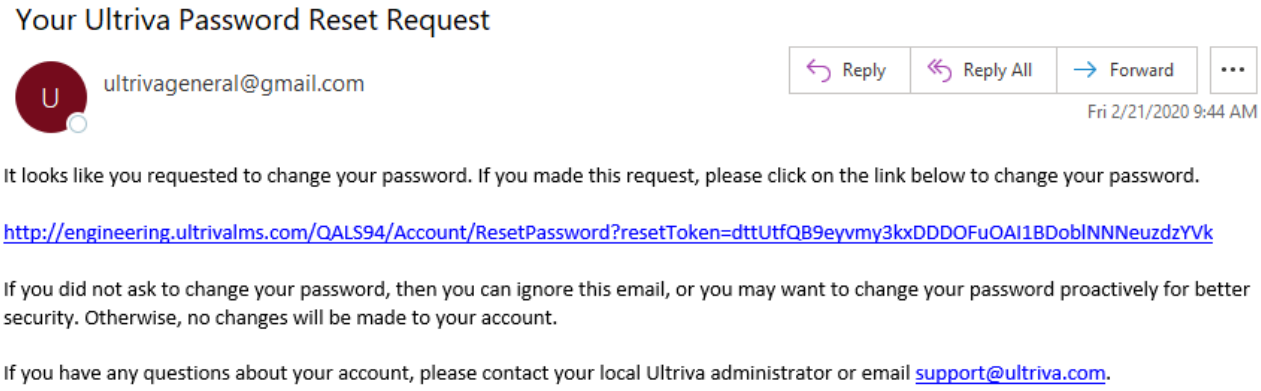


Email with reset password link will be send to valid email.



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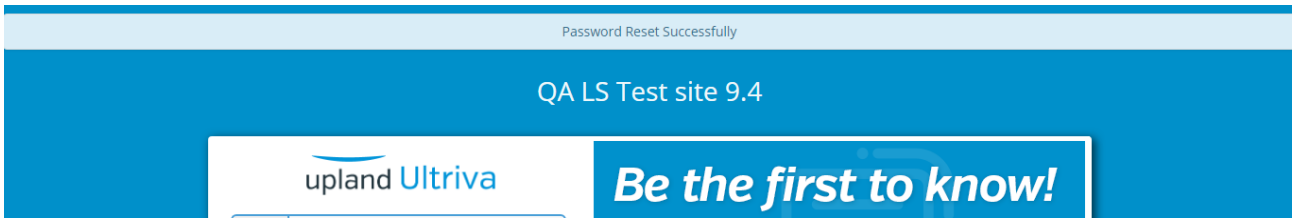
After pressing click on reset password link, you will be redirected to reset password page.

After password is reset, you will be redirected to login page indicating password was reset successfully.



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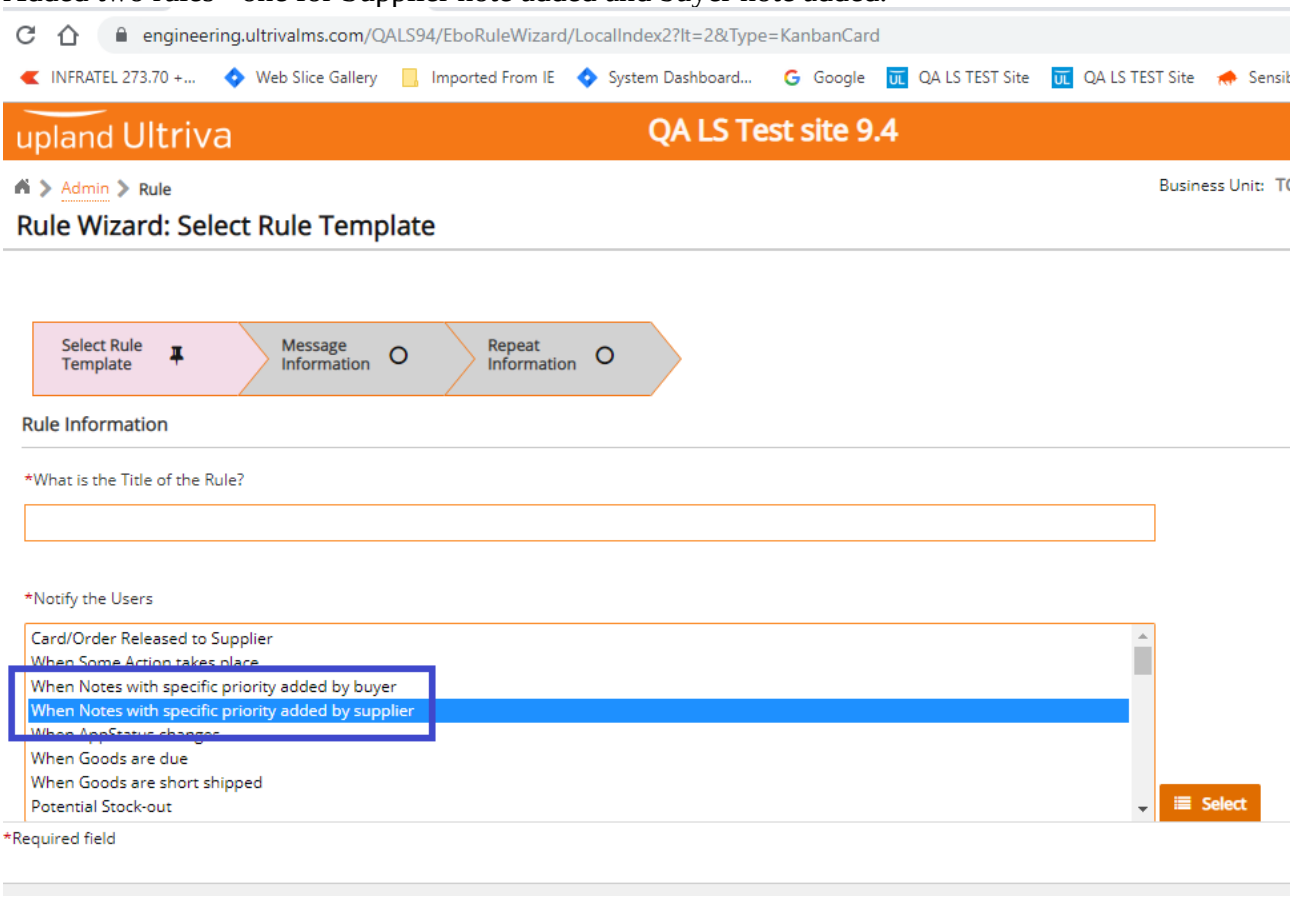
1.12 *Late shipment alert will check for new required ship date in case of order was rescheduled before firing the alert.*

1.13 *Adding Notes Template - Split into 2, one for Supplier note added and buyer note added*

Added two rules - one for Supplier note added and buyer note added.



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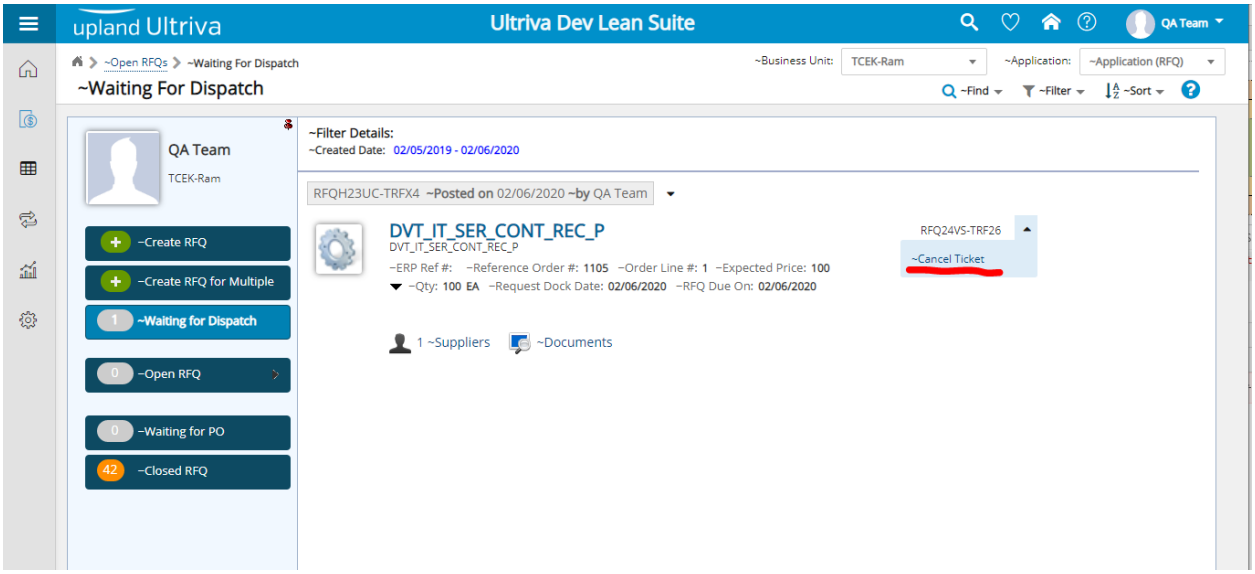
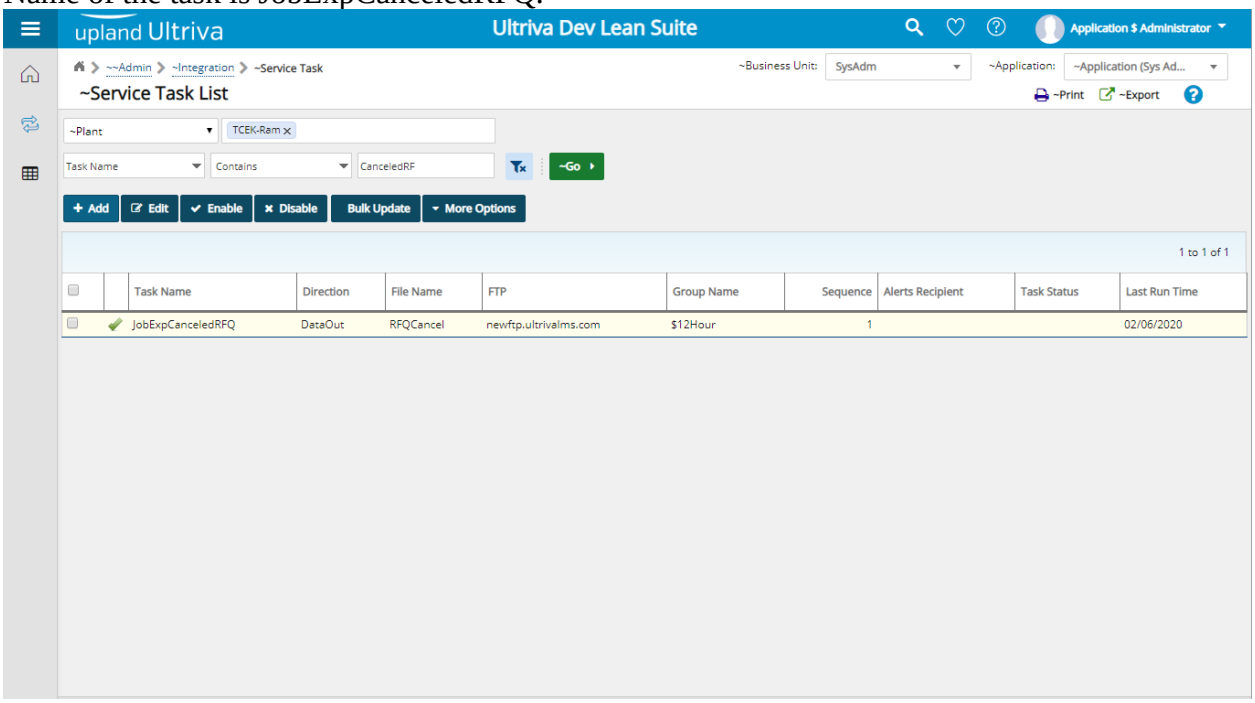
1.14 RFQ Cancel Batch Job created



RFQ Cancel Integration Task

New DataOut integration task is available to generate file to send to ERP with canceled RFQs. Name of the task is JobExpCanceledRFQ.



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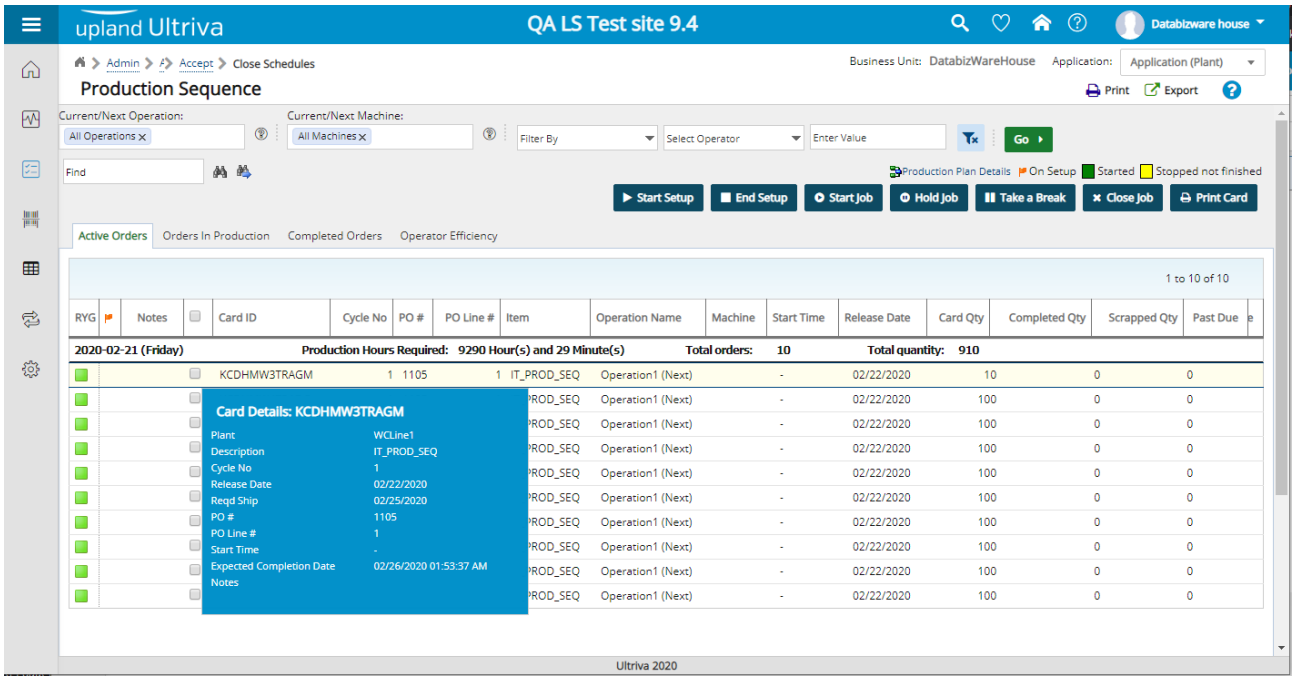
1.15 UI Enhancements

1.15.1 Production Sequence tooltip stays open if you click on it

When clicking on Card ID or PO # (Card ID column hidden), tooltip will stay open until you click in another place or if you pass mouse over tooltip and then move mouse outside tooltip.



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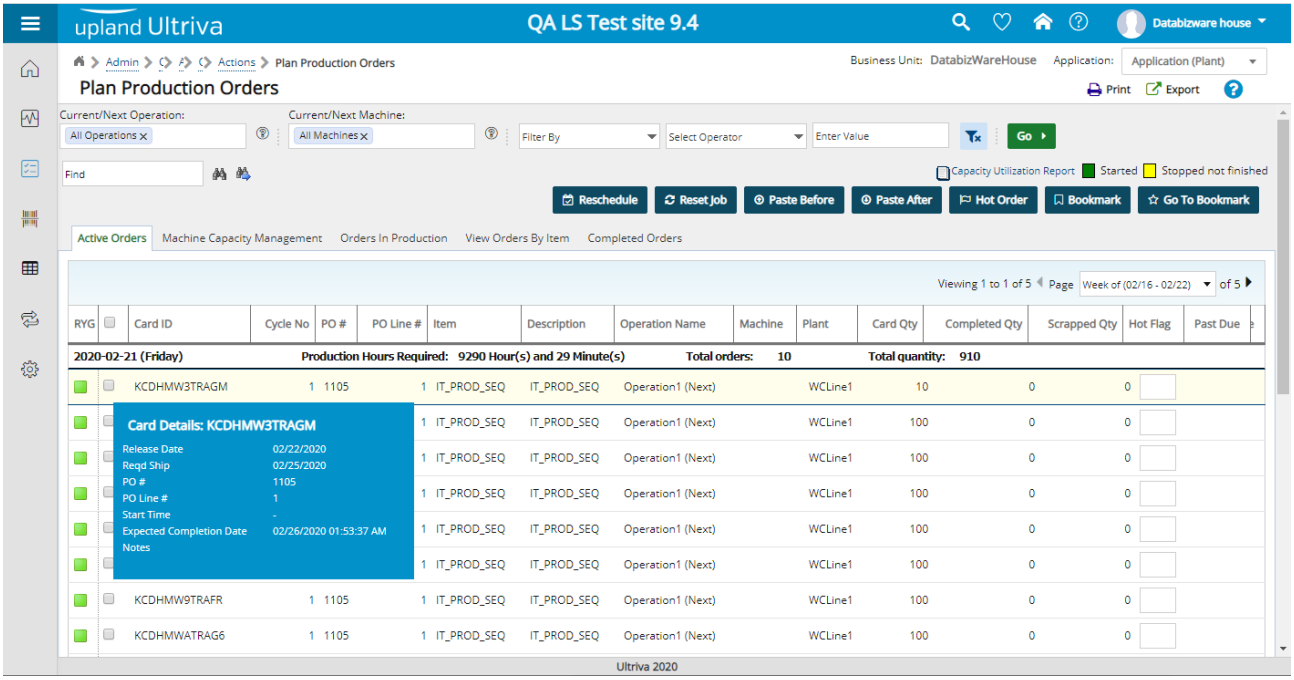
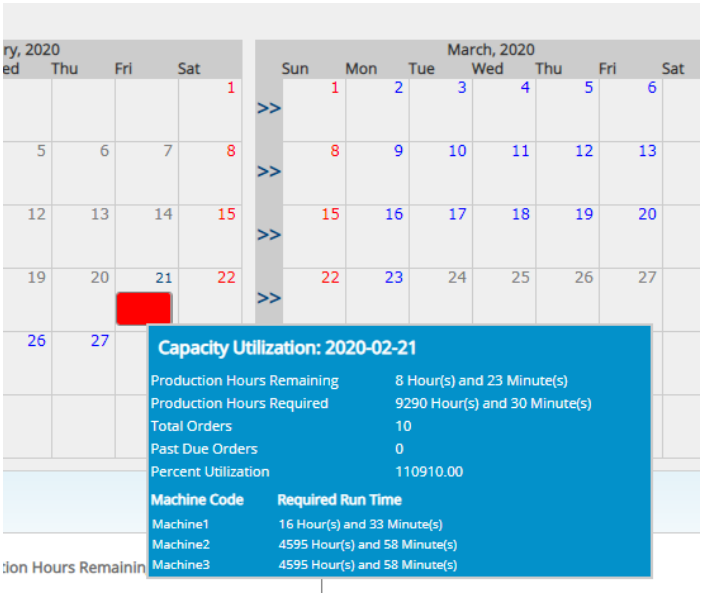
1.15.2 Plan Production Orders tooltip stays open when clicking on it

When clicking on Card ID or PO # (Card ID column hidden), tooltip will stay open until you click in another place or if you pass mouse over tooltip and then move mouse outside tooltip.



1.15.3 Capacity Utilization tooltip stays open when clicking on it

When clicking on each capacity utilization indicator, tooltip will stay open until you click in another place or if you pass mouse over tooltip and then move mouse outside tooltip.



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