



Ultriva 8.0 and Above
Adding a Supplier User
Reference Guide

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Adding a Supplier User

To navigate to “Adding a Supplier User”, click on “Admin”.

The screenshot shows the Ultriva Demo home dashboard. The top navigation bar includes the Ultriva logo, 'Ultriva Demo', search, heart, help, and user profile icons. The main content area is divided into several sections: 'Inventory Health (Items - Stock Out Risk)' with three cards for High (2 Items), Medium (2 Items), and Low (2 Items); 'Alerts' showing 'You have no new alerts'; 'Order Tracking' with four cards: 'Orders Not yet Acknowledged' (19), 'Orders past due for Shipping' (0), 'Expected by customer today (includes past due)' (0), and 'Orders to be shipped in next 7 days' (10); 'MRP Forecasts Gross Requirements' with three cards: 'Past + 7 Days' (0), 'Next 7 Days' (0), and 'Future' (0). A red arrow points to the 'Admin' button in the left-hand navigation menu.

Click on “User”

The screenshot shows the 'Admin' page. The top navigation bar includes the 'Admin' button and a help icon. The main content area is divided into several sections: 'User' (Add, manage and view users, reset passwords and update roles), 'Calendar' (View and manage the business calendar, update the calendar to mark all dates that the business is closed), 'Business Unit' (View and update business unit details such as name, location and address), 'Manage Tolerance Percentage' (Set/Update tolerance percentage for items in this business unit), 'Entities' (View and manage entities such as carrier, family and classification), and 'Supplier Item' (Add, manage and view supplier items). A red arrow points to the 'User' icon and text.

Click on the “Add” button

The screenshot shows the 'User List for AAA Inc' page. The top navigation bar includes 'Filters', 'Views', 'Print', 'Export', and a help icon. The main content area is divided into several sections: 'Filter By' (dropdown), 'Select Operator' (dropdown), 'Enter Value' (input), 'Go' button, 'Find User ID' (input), 'Add' button, 'Edit' button, 'Disable' button, 'View' button, and 'More Options' button. A red arrow points to the 'Add' button. The table below shows the user list:

Status	User ID	First Name	Last Name	Email ID	Work Phone	Buyer Code	Last Login On
✓	barkerj	John	Barker	Not Set	123-456-7890		-
✓	downsa	Arther	Downs	Not Set	555-555-5555		10/13/2015
✓	smithk	Kiki	Smith	Not Set	555-555-5555		12/01/2015

Personal Information



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

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 AAA Inc ?

Personal Information

*First Name:	<input type="text" value="Supplier"/>	MI:	<input type="text"/>	*Last Name:	<input type="text" value="User"/>
*Work Phone:	<input type="text"/>			Mobile Phone:	<input type="text"/>
*Email ID:	<input type="text"/>			Locale:	<input type="text" value="Not Set"/>
*Time zone:	<input type="text" value="Inherit From Owner Business Unit"/>				

Account Information

Enter a “User ID”

Account Information

*User ID:	<input type="text" value="Supplieruser"/>	Business unit:	AAA Inc
*Account Type:	<input type="text" value="--Select Account Type--"/>	Show Privilege	<input type="text"/>
Skip Lot Plan:	<input type="text" value="-- Select --"/>		

Click on the **drop down arrow** in the “Account Type” field.

Account Information

*User ID:	<input type="text" value="Supplieruser"/>	Business unit:	AAA Inc
*Account Type:	<input type="text" value="--Select Account Type--"/>	Show Privilege	<input type="text"/>

Select the “Account Type” for the user to be assigned to.



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 User” has less but enough to complete his/her job responsibilities.

Create User for AAA Inc

Account Information

*User ID: Business unit: AAA Inc

*Account Type: Show Privilege Buyer Code:

Skip Lot Plan:

Password Information

Password must be greater than 4 character(s).

*Password: *Confirm Password:

Application Access

next logon

- Select Account Type--
- EHMD Supplier Admin
- GKN Aero Supplier Users
- InterPlant Supplier
- QMS Supplier Admin
- QMS Supplier User
- RFQ Supplier User
- Shipper - Hi Temp
- Supplier Administrator
- Supplier CSR
- Supplier Shipper
- Supplier User**
- Supplier View Only

The selection appears.

Create User for AAA Inc

Account Information

*User ID: Business unit: AAA Inc

*Account Type: Show Privilege Buyer Code:

Skip Lot Plan:

Password Information

Enter a password in the “Password” field. Enter the password again in the “Confirm Password” field.

Select an option: “User must change password at next log in” or “Password never expires”. Click on the “Save” button

Password Information

Password must be greater than 4 character(s).

*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

The User has been added successfully

User List for AAA Inc Filters Views Print Export ?

✓ User Supplieruser added Successfully 

Filter By Select Operator Enter Value

Find User ID  

Sorted by: User ID 1 to 7 of 7

Status	User ID	First Name	Last Name	Email ID	Work Phone	Buyer Code	Last Login On
✓	barkerj	John	Barker	Not Set	123-456-7890		-
✓	downsa	Arther	Downs	Not Set	555-555-5555		10/13/2015
✓	smithk	Kiki	Smith	Not Set	555-555-5555		12/01/2015
✓	Supplieruser	Supplier	User	Not Set	\$		-
✓	Test.Supplier@test.com	Testing	User	Not Set	555-867-5309		-
✓	test3	test	test	Not Set	\$		01/03/2018
✓	uusser	ultriva	usser	mignatenko@uplandsoftware.com	1		01/09/2018

 Enabled 