



Ultriva 8.0 and Above

Update My Account

Reference Guide

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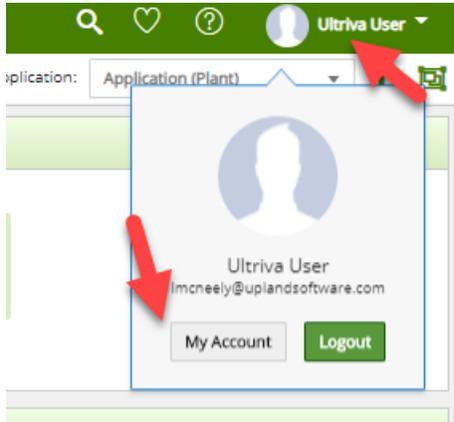
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My Preference



Tool Tip - My Preference can add many great features to the Ultriva screen layout including Login Preferences, Style/Color Themes, and Paging Preferences which allows the user to choose how many records to view per page.

To navigate to “My Preference”, click on your “name” then “My Account.”



Click on “My Preferences”



Login Preference



Quick Tip – When logging in, the user will automatically be signed in to the specified Plant, Supplier, or Internal Work Center that is selected in the “My Default Login Business Unit”

If needed the **Default Home Page** can be selected and the **My Default Login Business Unit** can be adjusted.

Click on the **drop down arrow** and a **drop down list** appears.



Style Preference



Quick Tip – Style preference allows you to choose a new color for your screen background.

To select a background color, click on the drop down arrow in the “My Theme” field and a drop down list appears.

Style Preference

My Theme  

My Bullet Graph Theme  

“Click on a new color” to select it

“The Bullet Graph Theme” can be changed in the same manner.

Paging and Layout Preferences



Quick Tip – The default number of line items to view, per page is set at 10 in Ultriva. A user can change the number of line items to view here. The benefit to adding line items per page reduces the number of pages you have to view when there are multiple items/pages set up in Ultriva.

Click in the “Show records per page” field and remove the existing number by clicking the backspace button. Add the new number.

The Date Format and Layout Preferences can be adjusted if necessary.

Paging Preference

*Show: records per page  Short Date Format  

Layout Preferences

Apply home layout to all plants/workcenters/suppliers  

Apply Actions/Reports/Admin layout to all plants/workcenters/suppliers  

Click on “Save”

My Preferences



General Actions Report Subscription

Login Preference

After Login Go To: Default My Default Login Business Unit: Plant One

My Default Home Page: Buyer Home

Style Preference

My Theme: Green My Bullet Graph Theme: RYG

Paging Preference

*Show: 50 records per page Short Date Format: Short Date (09/24/2020)

Layout Preferences

Apply home layout to all plants/workcenters/suppliers: ON Apply Actions/Reports/Admin layout to all plants/workcenters/suppliers: ON

*Required field

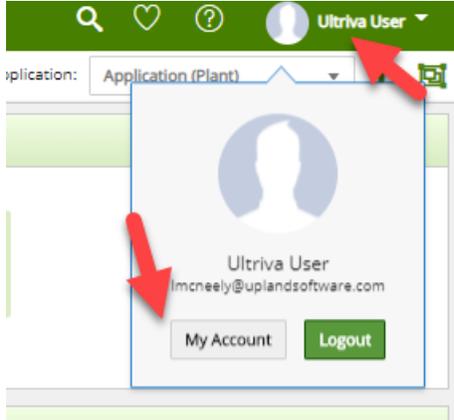
Save Cancel



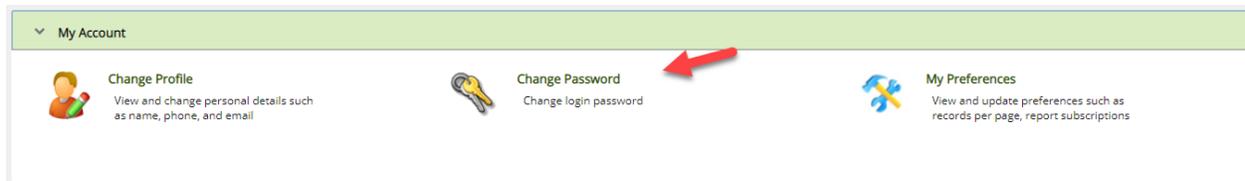
Important – “Log Out” and “Log In” to Ultriva” for the changes to take effect.

Change Password

Click on your “User Name” then “My Account”



Click on “Change Password”



Password Information

Enter your current password in the “Current Password” field. Enter a new password in the “New Password” field. Enter the new password again in the “Confirm Password” field.

Password Information

Password must be greater than 4 character(s).

Current Password:	<input type="password"/>	Last Changed On:	2018-10-04
New Password:	<input type="password"/>	Confirm Password:	<input type="password"/>

Red arrows point to the "Current Password", "New Password", and "Confirm Password" input fields.

Click on the drop down arrow in the “Security Question” field and a drop down list appears of the available security questions. Click on a selection.

Security Information

*Security Question:

*Answer:

*Required field

Save Cancel

Red arrows point to the "Security Question" dropdown menu and the "Answer" input field.

The selection appears. Enter the answer to the “Security Question”. Click on the “Save” button

Security Information

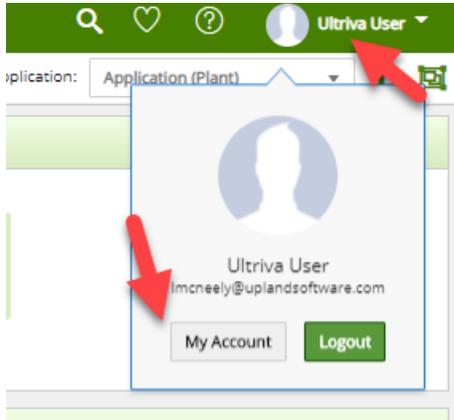
*Security Question:  *Answer: 

*Required field

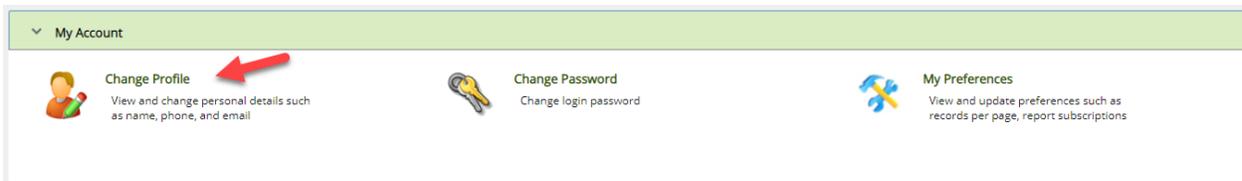
Your password has now been changed.

Change Profile

Click on your “User Name” then “My Account”



Click on “Change Profile”



Update the necessary **information** and Click on the “Save” button.

A screenshot of the 'Change Profile' form. The form is titled 'Profile' and 'Picture'. It contains several input fields for personal information: First Name (Ultriva), Work Phone (555-555-5555), Email (lmcneely@uplandssoftware.c), Time zone (GMT-06:00 Central Time (US t)), Last Name (User), Mobile Phone, and User Locale (Not Set). There are also fields for 'Delegate PO Approval' and 'Delegate for Date Range'. Red arrows point to the 'First Name' and 'Last Name' fields, and another red arrow points to the 'Save' button at the bottom right. A legend indicates that fields with an asterisk are required.

Your profile has been updated.