



Ultriva 7.6 and Higher
Approve or Reject Supplier
Reschedule Request
Reference Guide

Table of Contents

(Click to follow link)

<i>Navigating to Approve or Reject Supplier Reschedule.....</i>	<i>2</i>
<i>Home/Default Order Tracking – Approve/Reject Supplier Reschedule Request.....</i>	<i>3</i>
<i>Actions – Approve/Reject Supplier Reschedule Request</i>	<i>5</i>
<i>Reschedule Cards Filter</i>	<i>7</i>

Navigating to Approve or Reject Supplier Reschedule Request



Important – If the supplier reschedules an order, it must be approved by the plant prior to being shipped.



Quick Tip – There are 2 ways to navigate to “Approve or Reject” cards in Ultriva.

**Home (Default) Order Tracking
Actions/ Approve Supplier Reschedule Request**

Click on the link below for detailed instructions on approving/rejecting cards from the “Home” screen

[Home Default Order Tracking Reschedule](#)

Click on the link below for detailed instructions on approving/rejecting cards from the “Actions” screen

[Actions Approve Supplier Reschedule](#)

Home/Default Order Tracking – Approve/Reject Supplier Reschedule Request



Important – If the supplier reschedules an order, it must be approved or rejected prior to being shipped. If the request is “Rejected” it may be a good idea to contact the supplier or attach a “Note” to the rejected request explaining why.

From the **Home/Default** screen, place the cursor in the “**Order Tracking/Orders Awaiting Approval**” field.

Order Tracking

Card Count	Description
3	Orders awaiting Approval
9	Orders not yet Acknowledged
41	Orders past due for Shipping
72	Orders past due for Receipt

My Routines

Daily	Monthly
<ul style="list-style-type: none">Release OrdersReceive GoodsCreate Spike OrderAnalyze Material StatusApprove Virtual KanbanView Receipts Due	<ul style="list-style-type: none">Analyze Supplier PerformanceAnalyze Cycle TimeAnalyze Inventory SavingsAnalyze Stock outAnalyze Kanban Inventory

A selection list appears. Click on “**Reschedule Approval**”

Order Tracking

Card Count	Description
3	Orders awaiting Approval
9	Orders not yet Acknowledged
41	Orders past due for Shipping
72	Orders past due for Receipt

Awaiting Approval Details

Inspect Approval	0
Reschedule Approval	3
Release Approval	0
Runline Approval	0



Quick Tip – Notes may be attached at this time by clicking on the “Attach Notes” button. If the request will be rejected it may be a good idea to send the supplier a “Note” as to why it is being “Rejected”

Click in the selection box at the column heading to select all cards or select the cards individually. A checkmark will appear. Click on the “Approve” button to “Approve” the request or click on the “Reject” button to “Reject” the request.

<input checked="" type="checkbox"/>	Card ID ▲	Item ▲	Description ▼	Supplier Name ▼	Release Date ▼	Reqd Ship ▼	Reqd Receive ▲	Card Qty ▼	New Req Ship Date ▼	New Req Receive Date
<input checked="" type="checkbox"/>	KCD4N3ZCNA6G	24681	Widget 2	A&G Machining	06/23/2014	06/24/2014	06/25/2014	50	06/25/2014	06/26/2014
<input checked="" type="checkbox"/>	KCD4N35CNAYV	24681	Widget 2	A&G Machining	06/23/2014	06/24/2014	06/25/2014	50	06/25/2014	06/26/2014

If “Approve” was selected, the “Supplier Reschedule Successfully Approved”

Card ID	Item	Description
KCD4N3DCNA34	24681	Supplier Reschedule Successfully Approved.
KCD4N2WCNAH5	24681	Supplier Reschedule Successfully Approved.

If “Reject” was selected, the “Supplier Reschedule Successfully Rejected”

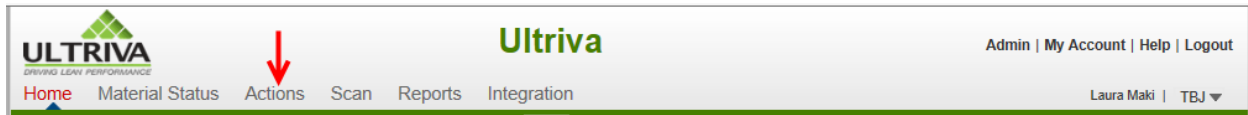
Card ID	Item	Description
KCD4N3LCNA8F	24681	Supplier Reschedule Successfully Rejected.
KCD4N3MCNAXA	24681	Supplier Reschedule Successfully Rejected.
KCD4N3NCNA48	24681	Supplier Reschedule Successfully Rejected.

Actions – Approve/Reject Supplier Reschedule Request



Important – If the supplier reschedules an order, it must be approved or rejected prior to being shipped. If the request is “Rejected” it may be a good idea to contact the supplier or attach a “Note” to the rejected request explaining why.

Click on “Actions”



Click on “Approve Supplier Reschedule Request”

Buyer Actions

	Release Manually release Cards that have been consumed. Depending on how the system is set up a Card will be considered consumed when the box/bin is either opened or emptied		Runline Approve Manually approve Cards waiting at runline. You will see a list of Cards waiting for approval and you can select the ones to approve
	Set PO Set P.O. details for the Cards. You will see a list of Cards that are waiting for the P.O. details to be set and you can select the ones to set the P.O. data		Receive Receive Cards as they arrive. You will see a list of Cards that are in transit and you can select the ones to receive
	Approve Approve Cards located at the receiving dock. You will see a list of Cards that are in the receiving dock and you can select the ones to approve		Put Away Deliver Cards to their respective location. You will see a list of Cards that are waiting for delivery and you can select the ones to deliver
	Buyer Queue Shows distribution of Card States for each Item		Recall If you accidentally marked a Card as consumed. You can undo that transaction here
	Reschedule Change Required date for the orders. You will see a list of Cards that can be rescheduled and you can select the ones to reschedule		BulkPrint View a list of all Cards on hand. If necessary you can also reprint Card labels
	Move Location Move Card to different location. You will see a list of all on hand Cards and you select the ones to be moved to different location		Adjust Inventory Transfer Inventory. You will see a list of all on hand Cards where it can be Transferred to different location all together
	Issue Inventory Issue Inventory. You will see a list of all on hand Cards where it can be Issued in small lots to a location		Virtual Kanban Approve Approve Virtual Kanban Cards. You will see a list of all Cards waiting for Virtual Kanban Approval and you can select the ones to approve and place the order
	Approve Supplier Reschedule Request ← Approve supplier reschedule requested Cards. You will see a list of all Cards waiting for Approval and you can select the ones to approve		Spike Orders Manually create one time orders



Quick Tip – If the selections are not what was intended to be approved you can change the “Filter” by clicking on the “Change Filter” button. The “Filter” allows the user to select specific criteria for the action they are performing.

Click on the link below for detailed instructions on how to change the “Filter”

[Reschedule Cards Filter](#)



Quick Tip – Notes may be attached at this time by clicking on the “Attach Notes” button. If the request will be rejected it may be a good idea to send the supplier a “Note” as to why it is being “Rejected”

Click in the selection box at the column heading to select all cards or select the cards individually. A checkmark will appear. Click on the “Approve” button to “Approve” the request or click on the “Reject” button to “Reject” the request.

<input type="checkbox"/>	Card ID ▲	Item ▲	Description ▼	Supplier Name ▼	Release Date ▼	Reqd Ship ▼	Reqd Receive ▲	Card Qty ▼	New Req Ship Date ▼	New Req Receive Date
<input checked="" type="checkbox"/>	KCD4N3ZCNA6G	24681	Widget 2	A&G Machining	06/23/2014	06/24/2014	06/25/2014	50	06/25/2014	06/26/2014
<input checked="" type="checkbox"/>	KCD4N35CNAYV	24681	Widget 2	A&G Machining	06/23/2014	06/24/2014	06/25/2014	50	06/25/2014	06/26/2014

If “Approve” was selected, the “Supplier Reschedule Successfully Approved”

Card ID	Item	Description
KCD4N3DCNA34	24681	Supplier Reschedule Successfully Approved.
KCD4N2WCNAH5	24681	Supplier Reschedule Successfully Approved.

If “Reject” was selected, the “Supplier Reschedule Successfully Rejected”

Card ID	Item	Description
KCD4N3LCNA8F	24681	Supplier Reschedule Successfully Rejected.
KCD4N3MCNAXA	24681	Supplier Reschedule Successfully Rejected.
KCD4N3NCNA48	24681	Supplier Reschedule Successfully Rejected.

Reschedule Cards Filter



Quick Tip – Further filtering can be performed if you are looking for specific data on the items. All “Filtering” in Ultriva is optional. When all changes have been made to the “Filter”, click on the “Go” button for the changes to take effect. If the parts are not appearing on the screen, it is best to double check the filters input first and make the necessary changes.

To further filter for specific data, click on the **dropdown arrow** in the “Supplier” field and a **drop down list** appears. Click on a “Supplier” In this example we will filter for a specific item from a supplier.

The screenshot shows the 'Approve Supplier Reschedule Cards Filter' interface. The 'Supplier' dropdown menu is open, displaying a list of suppliers including 'All Suppliers', 'Compressors LLC', 'A&G Machining', 'ABC', 'Accushape', 'Ainak', 'Aisin Canada', 'Aisin DS', 'Aisin Electronics', 'Aisin Electronics DS', 'AISIN ELECTRONICS INC (DS)', 'AISIN ELECTRONICS LLC (DS) - Site 2', 'Aisin USA', 'AISIN WORLD CORP OF AMERICA', 'AMP Plastics', 'Ample Supply Company', 'Anchor Industrial Adhesives', 'APLIX INC', 'ARJ Manufacturing', 'ARJ MANUFACTURING LLC', 'AVS Inc', 'Azdel Composite & Material', 'BASELL USA INC', 'BCD Mexico', 'Bend All', 'BEND ALL AUTOMOTIVE INC.', and 'BLUE GRASS METALS INC'. A red arrow points to the dropdown arrow in the 'Supplier' field. Other filters like 'Cards', 'Show', 'Category', and 'RYG' are visible and set to 'All'.

If Applicable: Click on the **drop down arrows** to make the remaining selections. The Cards, Show, Category and RYG should remain as they are below for our example.

The screenshot shows the 'Approve Supplier Reschedule Cards Filter' interface. The 'Supplier' dropdown menu is now closed and set to 'A&G Machining'. Red arrows point to the dropdown arrows in the 'Cards' and 'Category' fields. Other filters like 'Show' and 'RYG' are visible and set to 'All'.



Quick Tip – If applicable: The “Filter” can be further defined.

Click on the dropdown arrow in the “Filter By” field and a drop down list appears. Click on a selection. In this example we will select “Item”

The screenshot shows the 'Approve Supplier Reschedule Cards Filter' interface. At the top, there are several dropdown menus: 'Supplier' (All Suppliers), 'Cards' (All), 'Show' (Cards List), 'Category' (All), and 'RYG' (All). Below these is the 'Filter By' section, which includes a 'Select Operator' dropdown and an 'Enter Value' text box. The 'Filter By' dropdown is open, displaying a list of filter options: PO #, PO Line #, Release #, Release Line #, WorkOrder No., Item, Description, Reqd Receive, Reqd Ship, Accept Date, Product Line Title, and Commodity Code Title. A red arrow points to the 'Item' option.

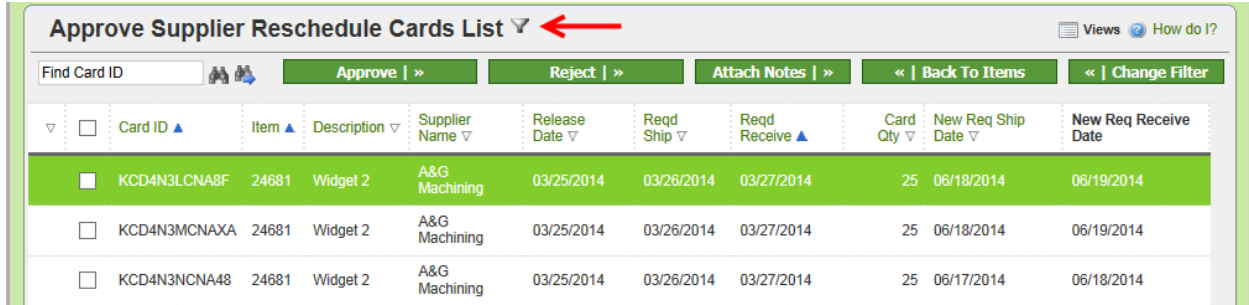
Click on the dropdown arrow in the “Select Operator” field and a drop down list appears. Click on a selection. In this example we will select “Equal To”

The screenshot shows the 'Approve Supplier Reschedule Cards Filter' interface. The 'Filter By' dropdown is now set to 'Item'. The 'Select Operator' dropdown is open, displaying a list of operator options: Equal To, Not Equal To, Greater Than, Greater Than Or Equal To, Lesser Than, Lesser Than Or Equal To, Starts With, Contains, Ends With, Not Starts With, Not Contains, Not Ends With, Is Empty, and Is Not Empty. A red arrow points to the 'Equal To' option.


Enter a value in the “Enter Value” field. Click on the “Go” button. In this example we will enter the “Item” number.

The screenshot shows the 'Approve Supplier Reschedule Cards Filter' interface. The 'Supplier' dropdown is now set to 'A&G Machining'. The 'Enter Value' field contains the number '24681'. The 'Go' button is highlighted with a red arrow.

The information appears for the “Filter” ran for the specific item number.



Find Card ID	Approve >>	Reject >>	Attach Notes >>	<< Back To Items	<< Change Filter				
Card ID ▲	Item ▲	Description ▼	Supplier Name ▼	Release Date ▼	Reqd Ship ▼	Reqd Receive ▲	Card Qty ▼	New Req Ship Date ▼	New Req Receive Date
<input checked="" type="checkbox"/> KCD4N3LCNA8F	24681	Widget 2	A&G Machining	03/25/2014	03/26/2014	03/27/2014	25	06/18/2014	06/19/2014
<input type="checkbox"/> KCD4N3MCNAXA	24681	Widget 2	A&G Machining	03/25/2014	03/26/2014	03/27/2014	25	06/18/2014	06/19/2014
<input type="checkbox"/> KCD4N3NCNA48	24681	Widget 2	A&G Machining	03/25/2014	03/26/2014	03/27/2014	25	06/17/2014	06/18/2014

 **Important** – If for some reason the output does not match what you are looking for, recheck the input in the filter and make the necessary changes. Remember to click on the “Go” button for the changes to take effect.

Click on a link below to **navigate back** to the previous screen.

[Home Default Order Tracking Reschedule](#)

[Actions Approve Supplier Reschedule](#)