



Ultriva 7.6 and Higher Change an Item Coordinator Reference Guide

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Change an Item Coordinator

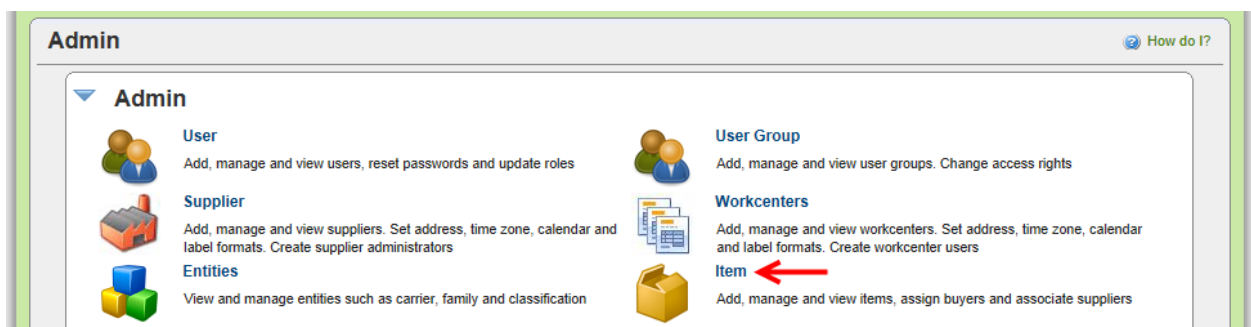


Quick Tip – Using the “Change Coordinator” function will save a lot of time when needing to change a “User” that has been assigned to multiple “Items”.

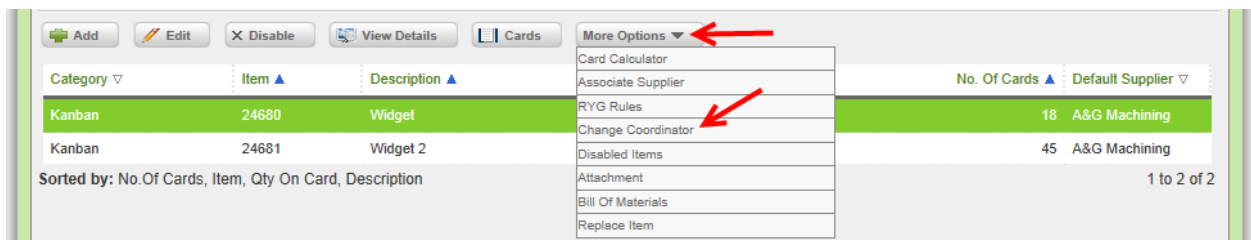
To navigate to “Change Coordinator”, click on “Admin”.



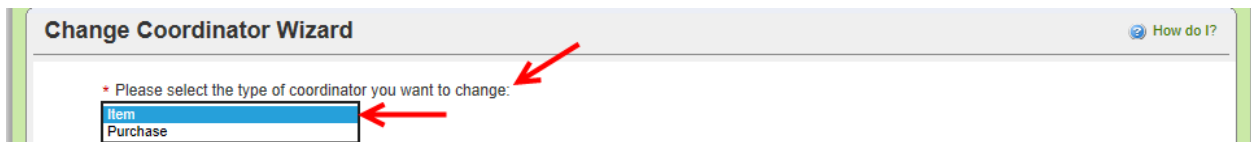
Click on “Item”



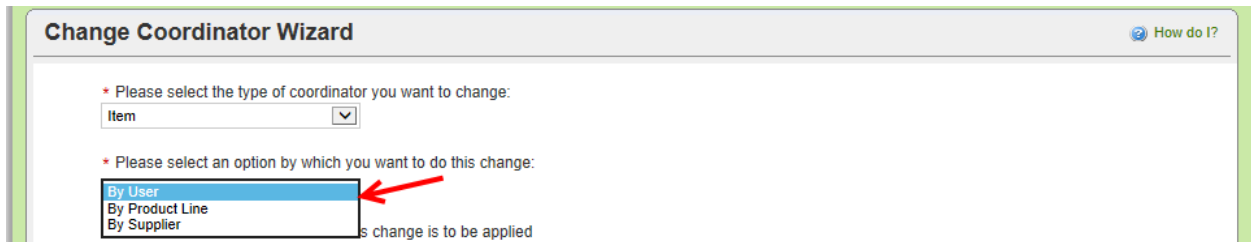
Click on “More Options” and a drop down list appears. Click on “Change Coordinator”



Click on the drop down arrow in the “Please select the type of coordinator you want to change” field. A drop down list will appear. Click on a selection. (*Item or Purchase Coordinator*)



Click on the **drop down arrow** in the “**Please select an option by which you want to do this change**” field. A **drop down list** will **appear**. Click on a selection. (*By User, By Product Line or By Supplier*)

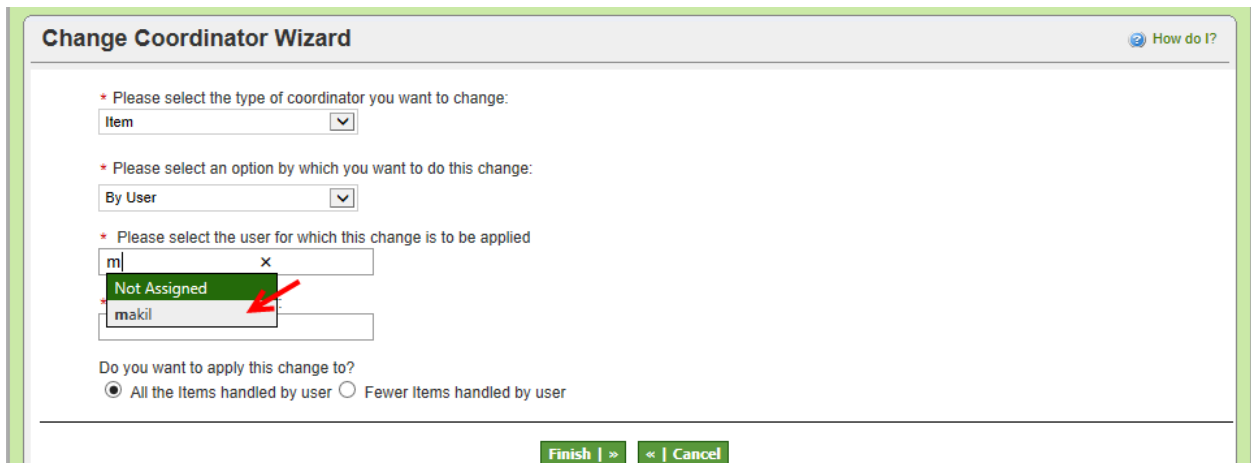


The screenshot shows the 'Change Coordinator Wizard' interface. The first step is 'Please select the type of coordinator you want to change:', with a dropdown menu set to 'Item'. The second step is 'Please select an option by which you want to do this change:', with a dropdown menu open showing three options: 'By User', 'By Product Line', and 'By Supplier'. A red arrow points to the 'By User' option. The text 's change is to be applied' is partially visible at the bottom of the dropdown.



Quick Tip – Here is where the “Existing User” will be chosen for this item. If a user is not currently assigned as a coordinator, a selection still has to be made. Select “Not Assigned”.

Click in the “**Please select the user for which this change is to be applied**” field. Press on the **spacebar** or start to **type the userid** and a **drop down list** of the **users names** appear. Select the “**User**”.



The screenshot shows the 'Change Coordinator Wizard' interface. The first step is 'Please select the type of coordinator you want to change:', with a dropdown menu set to 'Item'. The second step is 'Please select an option by which you want to do this change:', with a dropdown menu set to 'By User'. The third step is 'Please select the user for which this change is to be applied', with a text input field containing 'm' and a dropdown menu open showing two options: 'Not Assigned' and 'makil'. A red arrow points to the 'Not Assigned' option. Below the dropdown is the question 'Do you want to apply this change to?' with two radio buttons: 'All the Items handled by user' (selected) and 'Fewer Items handled by user'. At the bottom, there are two buttons: 'Finish | >' and '< | Cancel'.



Quick Tip – Here is where you will select the “New” user.

Click in the “Please select New User” field. Press on the spacebar or start to type the userid and a drop down list of the users names appear. Select the “User”.

Change Coordinator Wizard How do I?

* Please select the type of coordinator you want to change:
Item

* Please select an option by which you want to do this change:
By User

* Please select the user for which this change is to be applied
makil X

* Please select New User:
Imcneely X

Select an option for “Do you want to apply this change to?” Click on the “Finish” button.

Change Coordinator Wizard How do I?

* Please select the type of coordinator you want to change:
Item

* Please select an option by which you want to do this change:
By User

* Please select the user for which this change is to be applied
makil X

* Please select New User:
Imcneely X

Do you want to apply this change to?
 All the Items handled by user
 Fewer Items handled by user

Finish | >> << | **Cancel**

The “Coordinator Updated Successfully”

Items List Filters Views How do I?

Product Line: All
Supplier: A&G Machining X
Show: All Items
Item no. starts with:
RYG: All
Category: All
Go

83.9% Virtual
15.3% Kanban
2% Forecast

Coordinator updated successfully

Category	Item	Description	Qty On Card	No. Of Cards	Default Supplier
Kanban	24680	Widget	50	18	A&G Machining
Kanban	24681	Widget 2	25	45	A&G Machining

Sorted by: No.Of Cards, Item, Qty On Card, Description 1 to 2 of 2