



Ultriva 8.0 and Above

Approve

Received at Dock

Reference Guide

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Navigating to Approve



Quick Tip – This feature is used when the items are going through the inspection process prior to being placed On-Hand.

There are a few ways to navigate to the “Approve” cards.

Actions/ Approve

Actions/Buyer Queue/Received at Dock/Approve

Actions/Buyer Status/Received at Dock/Approve

Click on the link below for detailed instructions on Actions Approve

[Actions Approve](#)

Click on the link below for detailed instructions on Buyer Queue Approve

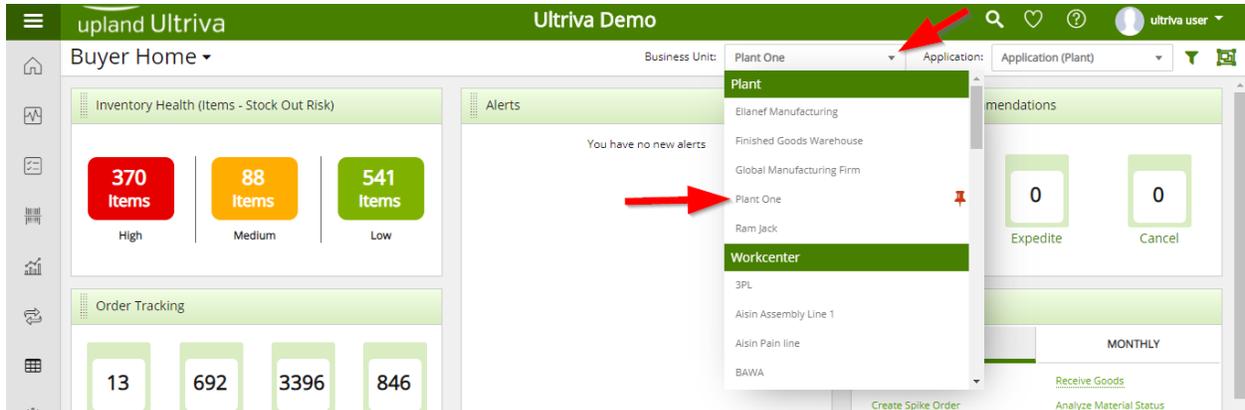
[Buyer Queue Approve](#)

Click on the link below for detailed instructions on Buyer Status Approve

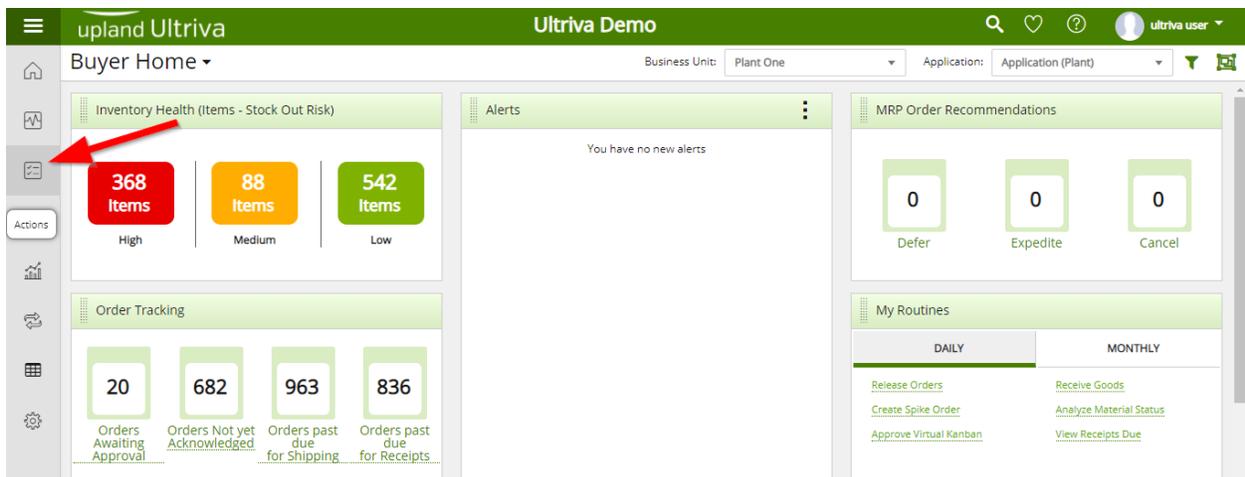
[Buyer Status Approve](#)

Actions/Approve

To navigate to “Approve”, select the “Plant or Workcenter”



Click on “Actions”



Click on “Approve”



Click on the “Supplier” field and start typing the supplier name or hit Space, a list of the suppliers will appear, Select the “Supplier”. Click on the “Go” button.

Approve Cards Filter

Supplier: [Dropdown with list: AAA Inc (VC1234), ABC Inc. (AB345678), ABD (65432), ABE (98765), ACME, Ltd. (4311), ACMED (22111)]

Cards: [All] Show: [Cards List] Category: [All] RYG: [All] Approve: [Cards]

Operator: [Dropdown] Enter Value: [Text Box] [Fix] [Go]



Quick Tip – If the selections are not what was intended to be “Approved” you can change the “Filter”. 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”



Click on the **part number** to advance to the next screen or click on the **line item** to **highlight** the line. Click on the “Show Cards” button. The user may not see this screen if Cards List is chosen in the “Show” field as a selected filter.

Approve Items List

Supplier: [ACME, Ltd. (4311) x] Cards: [All] Show: [Items List] Category: [All] RYG: [All] Approve: [Cards]

Filter By: [Dropdown] Select Operator: [Dropdown] Enter Value: [Text Box] [Fix] [Go]

Sorted by: Item 1 to 1 of 1

RYG	Item	Description	Total Qty	Total Cards
	00805947	TRIPOD GI1300	3,672	3

[Show Cards]

Click in the selection box at the column heading to select all cards or select the cards individually. A checkmark will appear.

Approve Cards List Views Print Export ?

Find Card ID 🔍 🔊 🔊 Approve Reject Attach Notes Back To Items Change Filter

Sorted by: Item, Req'd Receive, Card ID 1 to 3 of 3

<input checked="" type="checkbox"/>	Card ID ↑	Item ↑	Release Date ↑	Req'd Ship ↑	Ship Date ↑	Req'd Receive ↑	Receive Date ↑	Card Qty ↑	Ship Qty ↑	Receive Qty ↑	Approve Qty ↑	Storage Location ↑	Lot #
<input checked="" type="checkbox"/>	KCDA75QCNAU9	00805947	10/28/2016	11/04/2016	04/08/2020	11/08/2016	08/04/2020	1224	1224	1,224	<input type="text" value="1224"/>	11R00000	EX200408-044897
<input checked="" type="checkbox"/>	KCDA75SCNAYE	00805947	11/15/2017	11/29/2017	04/08/2020	01/03/2018	04/08/2020	1224	1224	1,224	<input type="text" value="1224"/>	11R00000	EX200408-04495M
<input checked="" type="checkbox"/>	KCDA75UCNA2J	00805947	11/15/2017	11/29/2017	04/08/2020	01/03/2018	04/08/2020	1224	1224	1,224	<input type="text" value="1224"/>	11R00000	EX200408-0450EQ

Approve Reject Attach Notes Back To Items Change Filter



Quick Tip – If approving the order the user can enter the “New Storage Locations” or “Approve Qty”. Notes can be attached by clicking on the “Attach Notes” button.

Click on the “Approve” button to approve the items or click on the “Reject” button to return the items to the supplier.

Approve Cards List Views Print Export ?

Find Card ID 🔍 🔊 🔊 Approve Reject Attach Notes Back To Items Change Filter

Sorted by: Item, Req'd Receive, Card ID 1 to 3 of 3

<input checked="" type="checkbox"/>	Card ID ↑	Item ↑	Release Date ↑	Req'd Ship ↑	Ship Date ↑	Req'd Receive ↑	Receive Date ↑	Card Qty ↑	Ship Qty ↑	Receive Qty ↑	Approve Qty ↑	Storage Location ↑	Lot #
<input checked="" type="checkbox"/>	KCDA75QCNAU9	00805947	10/28/2016	11/04/2016	04/08/2020	11/08/2016	08/04/2020	1224	1224	1,224	<input type="text" value="1224"/>	11R00000	EX200408-044897
<input checked="" type="checkbox"/>	KCDA75SCNAYE	00805947	11/15/2017	11/29/2017	04/08/2020	01/03/2018	04/08/2020	1224	1224	1,224	<input type="text" value="1224"/>	11R00000	EX200408-04495M
<input checked="" type="checkbox"/>	KCDA75UCNA2J	00805947	11/15/2017	11/29/2017	04/08/2020	01/03/2018	04/08/2020	1224	1224	1,224	<input type="text" value="1224"/>	11R00000	EX200408-0450EQ

Approve Reject Attach Notes Back To Items Change Filter

If the selection was “Approve” The “Cards Successfully Approved” and placed in the Put Away or the On-Hand state.

Approve Cards Results ?

Back To Items Back To Cards

Following Cards were successful

Card ID	Item	Description
KCDA75QCNAU9	00805947	Card Successfully Approved.
KCDA75SCNAYE	00805947	Card Successfully Approved.

If the **selection** was “**Reject**”, the “**Cards Successfully Rejected**” and **automatically returned** back to the **supplier** and placed “**In Process**”

Reject Cards Results ?

[← Back To Items](#) [← Back To Cards](#)

Following Cards were successful

Card ID	Item	Description
KCDA7SUCNA2J	00805947	Card Successfully Rejected. 

Buyer Queue Received at Dock

To navigate to the “Buyer Queue”, select the “Plant or Workcenter”

The screenshot shows the Ultriva Buyer Home dashboard. The top navigation bar includes the Ultriva logo, the user name 'ultriva user', and search, heart, and help icons. The main content area is divided into several sections: 'Inventory Health (Items - Stock Out Risk)' with three cards for High (370 Items), Medium (88 Items), and Low (541 Items) risk levels; 'Alerts' showing 'You have no new alerts'; 'Order Tracking' with four cards showing counts: 13, 692, 3396, and 846; and 'MRP Order Recommendations' with two cards showing '0' for 'Expedite' and '0' for 'Cancel'. A dropdown menu for 'Business Unit' is open, showing a list of plants and workcenters. A red arrow points to the 'Plant One' option in the dropdown. Another red arrow points to the 'Application' dropdown menu.

Plant
Plant One
Elianef Manufacturing
Finished Goods Warehouse
Global Manufacturing Firm
Plant One
Ram Jack

Workcenter
3PL
Aisin Assembly Line 1
Aisin Pain line
BAWA

Click on “Actions”

The screenshot shows the Ultriva Buyer Home dashboard with the 'Actions' button highlighted by a red arrow. The 'Inventory Health' section now shows 368 High risk items, 88 Medium risk items, and 542 Low risk items. The 'Order Tracking' section shows four cards: 'Orders Awaiting Approval' (20), 'Orders Not yet Acknowledged' (682), 'Orders past due for Shipping' (963), and 'Orders past due for Receipts' (836). The 'MRP Order Recommendations' section shows three cards: 'Defer' (0), 'Expedite' (0), and 'Cancel' (0). The 'My Routines' section is expanded, showing a list of actions under 'DAILY' and 'MONTHLY' tabs. A red arrow points to the 'Actions' button in the left sidebar.

Actions
Release Orders
Create Spike Order
Approve Virtual Kanban
Receive Goods
Analyze Material Status
View Receipts Due



Quick Tip – If approving the order the user can enter the “New Storage Locations” or “Approve Qty”. Notes can be attached by clicking on the “Attach Notes” button.

Click on the “Approve” button to **approve** the items or click on the “Reject” button to **return** the **items** to the **supplier**.

Approve Cards List Views Print Export ?

Find Card ID

Sorted by: Item, Reqd Receive, Card ID 1 to 3 of 3

<input checked="" type="checkbox"/>	Card ID ↑	Item ↑	Release Date ↑	Reqd Ship ↑	Ship Date ↑	Reqd Receive ↑	Receive Date ↑	Card Qty ↑	Ship Qty ↑	Receive Qty ↑	Approve Qty	Storage Location ↑	Lot #
<input checked="" type="checkbox"/>	KCDA7SVCNAZY	00805947	04/03/2019	04/09/2020	03/18/2020	04/13/2020	05/21/2020	50	50	50	<input type="text" value="50"/>	<input type="text" value="11R00000"/>	EX190516-0243LG
<input checked="" type="checkbox"/>	KCDNEP2CNACT	00805947	05/20/2020	06/01/2020	07/21/2020	07/24/2020	07/26/2020	500000	500000	500,000	<input type="text" value="500000"/>	<input type="text" value="11R00000"/>	EX200721-05586K
<input checked="" type="checkbox"/>	KCDNENZCNAUQ	00805947	05/20/2020	06/01/2020	07/21/2020	07/24/2020	07/26/2020	500000	500000	500,000	<input type="text" value="500000"/>	<input type="text" value="11R00000"/>	EX200721-05586K

If the **selection** was “Approve” The “Cards Successfully Approved” and placed in the **Put Away** or the **On-Hand** state.

Approve Cards Results ?

Following Cards were successful

Card ID	Item	Description
KCDA75QCNAU9	00805947	Card Successfully Approved.
KCDA75SCNAYE	00805947	Card Successfully Approved.

If the **selection** was “Reject”, the “Cards Successfully Rejected” and automatically returned back to the **supplier** and placed “In Process”

Reject Cards Results ?

Following Cards were successful

Card ID	Item	Description
KCDA75UCNA2J	00805947	Card Successfully Rejected.

Buyer Status Approved

To navigate to the “Buyer Status”, select the “Plant or Workcenter”

The screenshot shows the Ultriva Buyer Home dashboard. The top navigation bar includes the Ultriva logo, the user name 'ultriva user', and search, heart, and help icons. The main content area is divided into several sections: 'Inventory Health (Items - Stock Out Risk)' with three cards for High (370 Items), Medium (88 Items), and Low (541 Items) risk levels; 'Alerts' showing 'You have no new alerts'; 'Order Tracking' with four cards for 13, 692, 3396, and 846 items; and 'MRP Order Recommendations' with two cards for 0 items each, labeled 'Expedite' and 'Cancel'. A dropdown menu for 'Business Unit' is open, showing options for 'Plant' (Elianef Manufacturing, Finished Goods Warehouse, Global Manufacturing Firm, Plant One, Ram Jack) and 'Workcenter' (SPL, Aisin Assembly Line 1, Aisin Pain line, BAWA). A red arrow points to the 'Plant One' option in the dropdown menu.

Click on “Reports”

The screenshot shows the Ultriva Buyer Home dashboard. The top navigation bar is the same as in the previous screenshot. The main content area is divided into several sections: 'Inventory Health (Items - Stock Out Risk)' with three cards for High (367 Items), Medium (88 Items), and Low (543 Items) risk levels; 'Alerts' showing 'You have no new alerts'; 'MRP Order Recommendations' with three cards for 0 items each, labeled 'Defer', 'Expedite', and 'Cancel'; and 'My Routines' with two tabs for 'DAILY' and 'MONTHLY' routines. A red arrow points to the 'Reports' button in the left sidebar.

Click on “Buyer Status”

The screenshot shows the Ultriva Reports page. The top navigation bar includes the breadcrumb 'Actions > Approve > Reports', the user name 'ultriva user', and search, heart, and help icons. The main content area is divided into several sections: 'Buyer Reports' with four report cards: 'Buyer Status' (Shows distribution of Card for each Item), 'Supplier On-Time' (Track Supplier on time shipment/Receipt performance), 'OnHand Inventory' (View Inventory Status Report), and 'Audit On Hand Summary' (View Audit On Hand Summary Report). A red arrow points to the 'Buyer Status' report card.

Click on the “**Supplier**” field and start typing the supplier name or hit Space, a list of the suppliers will appear, Select the “**Supplier**”. **Click** on the “**Go**” button.

Buyer Status Report

Supplier: A
Show: All Items x
Category: All
RYG: All
Product Line: All
Commodity Code: All

Operator: Enter Value [Tx] [Go]

- AAA Inc (VC1234)
- ABC Inc. (AB345678)
- ABD (65432)
- ABE (98765)
- ACME, Ltd. (4311)
- ACMED (22111)

Click on the **dropdown arrow** in the “**Filter By**” field. **Click** on a “**selection**” *In this example we will select “Item”.*

Buyer Status Report

Supplier: AAA Inc (VC1234) x
Show: All Items x
Category: All
RYG: All
Product Line: All
Commodity Code: All

Filter By: Item
Select Operator: Enter Value [Tx] [Go]

- Item
- Description

Click on the **dropdown arrow** in the “**Select Operator**” field. **Click** on a “**selection**” *In this example we will select “Equal To”.*

Buyer Status Report

Supplier: AAA Inc (VC1234) x
Show: All Items x
Category: All
RYG: All
Product Line: All
Commodity Code: All

Item: Select Operator: Equal To
Enter Value [Tx] [Go]

- 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
- Is Not Empty

Enter a value in the “**Enter Value**” field. **Click** on the “**Go**” button. *In this example we selected Item/Equal To so the value to be entered is the item number for the Item to be “Approved”*

Buyer Status Report Print Export ?

Supplier: ACME, Ltd. (4311) x
Show: All Items x
Category: All
RYG: All
Product Line: All
Commodity Code: All

Item: Equal To: 00805947 [Tx] [Go]

The “**Buyer Status Report**” appears. In the “**Received at Dock**” column, click on the number of cards to “**Approve**”

Buyer Status Report Print Export ?

Supplier: Show: Category: All RYG: All Product Line: All Commodity Code: All

Item:

Sorted by: Item 1 to 1 of 1

RYG	Item	On Hand		Released		In Process		At Ship Hub		In Transit		Received At Dock		On Hand At Supplier		Others		Description	Supplier Item No.	Min Order Cards	Total Cards
		Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty				
	00805947	2	2,448	0	0	0	0	0	0	0	0	3	1,000,050	0	0	0	0.0	TRIPOD GI1300	00805947	0	5

Click in the selection box at the column heading to select all cards or select the cards individually. A checkmark will appear.

Approve Cards List Views Print Export ?

Find Card ID:

Sorted by: Item, Req'd Receive, Card ID 1 to 3 of 3

<input type="checkbox"/>	Card ID ↑	Item ↑	Release Date ↑	Req'd Ship ↑	Ship Date ↑	Req'd Receive ↑	Receive Date ↑	Card Qty ↑	Ship Qty ↑	Receive Qty ↑	Approve Qty	Storage Location ↑	Lot #
<input checked="" type="checkbox"/>	KCDA7SVCNAZY	00805947	04/03/2019	04/09/2020	03/18/2020	04/13/2020	05/21/2020	50	50	50	<input type="text" value="50"/>	11R00000	EX190516-0243LG
<input checked="" type="checkbox"/>	KCDNEP2CNACT	00805947	05/20/2020	06/01/2020	07/21/2020	07/24/2020	07/26/2020	500000	500000	500,000	<input type="text" value="500000"/>	11R00000	EX200721-05586K
<input checked="" type="checkbox"/>	KCDNENZCNAUQ	00805947	05/20/2020	06/01/2020	07/21/2020	07/24/2020	07/26/2020	500000	500000	500,000	<input type="text" value="500000"/>	11R00000	EX200721-05586K



Quick Tip – If approving the order the user can enter the “**New Storage Locations**” or “**Approve Qty**”. Notes can be attached by clicking on the “**Attach Notes**” button.

Click on the “**Approve**” button to approve the items or click on the “**Reject**” button to return the items to the supplier.

Approve Cards List Views Print Export ?

Find Card ID:

Sorted by: Item, Req'd Receive, Card ID 1 to 3 of 3

<input type="checkbox"/>	Card ID ↑	Item ↑	Release Date ↑	Req'd Ship ↑	Ship Date ↑	Req'd Receive ↑	Receive Date ↑	Card Qty ↑	Ship Qty ↑	Receive Qty ↑	Approve Qty	Storage Location ↑	Lot #
<input checked="" type="checkbox"/>	KCDA7SVCNAZY	00805947	04/03/2019	04/09/2020	03/18/2020	04/13/2020	05/21/2020	50	50	50	<input type="text" value="50"/>	11R00000	EX190516-0243LG
<input checked="" type="checkbox"/>	KCDNEP2CNACT	00805947	05/20/2020	06/01/2020	07/21/2020	07/24/2020	07/26/2020	500000	500000	500,000	<input type="text" value="500000"/>	11R00000	EX200721-05586K
<input checked="" type="checkbox"/>	KCDNENZCNAUQ	00805947	05/20/2020	06/01/2020	07/21/2020	07/24/2020	07/26/2020	500000	500000	500,000	<input type="text" value="500000"/>	11R00000	EX200721-05586K

If the **selection** was “**Approve**” The “**Cards Successfully Approved**” and placed in the **Put Away** or the **On-Hand** state.

Approve Cards Results ?

[← Back To Items](#) [← Back To Cards](#)

Following Cards were successful

Card ID	Item	Description
KCDA75QCNAU9	00805947	Card Successfully Approved. 
KCDA75SCNAYE	00805947	Card Successfully Approved.

If the **selection** was “**Reject**”, the “**Cards Successfully Rejected**” and automatically returned back to the **supplier** and placed “**In Process**”

Reject Cards Results ?

[← Back To Items](#) [← Back To Cards](#)

Following Cards were successful

Card ID	Item	Description
KCDA75UCNA2J	00805947	Card Successfully Rejected. 

Approve 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 Approve 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 “Supplier” field and start typing the supplier name or hit Space, a list of the suppliers will appear, Select the “Supplier”. In this example we will filter for a specific item from a supplier.

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.



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.

Supplier: All Suppliers x

Cards: All

Show: Items List

Category: All

RYG: All

Approve: Cards

Filter By: Select Operator Enter Value [Tx] [Go]

PO #

PO Line #

Release #

Release Line #

SO Work Order No.

Item

RK Description Description Total Qty

Release Date

TrackingNo

Ship Date

Product Line Title

CarrierTitle

Supplier Name

Packing Slip No

Ship Qty

Product Line Title

TRIPOD GI1300 1,000,050

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.

Supplier: All Suppliers x

Cards: All

Show: Items List

Category: All

RYG: All

Approve: Cards

Item Select Operator Enter Value [Tx] [Go]

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

Is Not Empty

Sorted by: Item

RYG Item Description Total Qty

00805947 TRIPOD GI1300 1,000,050

Enter a value in the “Enter Value” field. Click on the “Go” button. In this example we selected Item/Equal To so the value to be entered is the item number.

Supplier: All Suppliers x

Cards: All

Show: Cards List

Category: All

RYG: All

Approve: Cards

Item Equal To 00805947 [Tx] [Go]

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

Approve Cards List

Views Print Export

Find Card ID [A] [A]

[Approve] [Reject] [Attach Notes] [Back To Items] [Change Filter]

Sorted by: Item, Req'd Receive, Card ID 1 to 3 of 3

	Card ID ↑	Item ↑	Release Date ↑	Req'd Ship ↑	Ship Date ↑	Req'd Receive ↑	Receive Date ↑	Card Qty	Ship Qty ↑	Receive Qty ↑	Approve Qty	Storage Location ↑	Lot #
<input type="checkbox"/>	KCDA7SVCNAZY	00805947	04/03/2019	04/09/2020	03/18/2020	04/13/2020	05/21/2020	50	50	50	50	11R00000	EX190516-0243LG
<input type="checkbox"/>	KCDNEP2CNACT	00805947	05/20/2020	06/01/2020	07/21/2020	07/24/2020	07/26/2020	500000	500000	500,000	500000	11R00000	EX200721-05586K
<input type="checkbox"/>	KCDNENZCNAUQ	00805947	05/20/2020	06/01/2020	07/21/2020	07/24/2020	07/26/2020	500000	500000	500,000	500000	11R00000	EX200721-05586K

[Approve] [Reject] [Attach Notes] [Back To Items] [Change Filter]



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 Approve screen.

