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**Ultriva 8.0 and Above  
Manually Releasing Cards  
Reference Guide**

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## Navigating to Releasing a Card(s)



**Important** – If Ultriva is integrated with the ERP system, check with your Ultriva Administrator to make sure that manually releasing a card will not create integration failures.



**Quick Tip** – There are multiple choices to select from when “Releasing” the order. The list is below. Choose the one that best fits the need for the user.

*Home (Default)*  
*Actions/ Release*  
*Buyer Queue*  
*Buyer Status*

Click on the link below for detailed instructions on releasing cards from the “Home” screen

[Released Cards Home Default Screen](#)

Click on the link below for detailed instructions on releasing cards from the “Actions” screen

[Released Cards Actions Screen](#)

Click on the link below for detailed instructions on releasing cards from the “Buyer Queue” screen

[Released Cards Buyer Queue](#)

Click on the link below for detailed instructions on releasing cards from the “Buyer Status” screen

[Released Cards Buyer Status](#)

## Release Cards - Home (Default) Screen



**Important – If Ultriva is integrated with the ERP system, check with your Ultriva Administrator to make sure that manually releasing a card will not create integration failures.**

Select the “Plant or Workcenter”

From the “Home” (Default) screen, in the **My Routines** field, click on “Release Cards”

If this is the first time viewing this screen, select the “Supplier” and click on the “Go” button.



**Quick Tip** – If the selections are not what was intended to be released you can change the “Filter”. The “Filter” allows the user to select specific criteria for the action they are performing. If the Filter is changed, click on the “Go” button.

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



Click on the **part number** to advance to the “Release Cards” list, or click on a **line item** and the **line will highlight**. If you **highlighted** the line, click on the “Show Cards” button

Release Items List

Supplier: ABC Inc. (AB345678) X Cards: All Show: Items List Category: All RYG: All

Filter By: Select Operator: Enter Value:

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Sorted by: Item 1 to 1 of 1

RYG	Item	Description	Total Cards	Total Qty
<input checked="" type="checkbox"/>	0125 004200	Emerson Test	1	1,000



**Quick Tip** – If an item has more than one supplier, “Auto Assign” will be an option under the “Supplier” column. If left on “Auto Assign, Ultriva will automatically calculate and release the card(s) to the appropriate supplier based on the supplier percentages entered in the supplier set up. If preferred, the supplier can be selected by clicking on the dropdown arrow in the supplier field and choosing the supplier.

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 “Release” button.

Release Cards List

Find Card ID:

Sorted by: Item, Last Received 1 to 3 of 3

<input checked="" type="checkbox"/>	Card ID	Item	Description	Cycle No	Qty On Card	Card Qty	Location Code	Last Received	Supplier
<input checked="" type="checkbox"/>	KCDF4URCNABB	0125 004200	Emerson Test	2	1000	1000		-	-- Auto Assign --
<input checked="" type="checkbox"/>	KCDL6BYCNAZZ	0125 004200	Emerson Test	1	1000	0		-	-- Auto Assign --
<input checked="" type="checkbox"/>	KCDMA6PCNA7R	0125 004200	Emerson Test	0	1000	1000	Dock	12/02/2019	-- Auto Assign --

## The “Cards Successfully Released”

Release Cards Results				<a href="#">How do I?</a>
				<a href="#">«   Back To Items</a> <a href="#">«   Back To Cards</a>
<a href="#">Following cards were successful</a> 				
Card ID	Item	Card Qty	Description	
KCD4NZWCNADH	242424	100	Released To A&G Machining.	
KCD4NZXCNABT	242424	100	Released To LJM Machining Supplies.	
KCD4P39CNAWA	242424	100	Released To A&G Machining.	
KCD4P5VCNADX	242424	100	Released To LJM Machining Supplies.	

## Release Cards – Actions Screen



**Important – If Ultriva is integrated with the ERP system, check with your Ultriva Administrator to make sure that manually releasing a card will not create integration failures.**

Select the “Plant or Workcenter”

Click on “Actions”

Click on “Release”

If this is the first time viewing this screen, select the “Supplier” and click on the “Go” button.

The screenshot shows the 'Release Items List' form. At the top right, there are icons for Filters, Views, Print, Export, and a help icon. The main form area contains several dropdown menus: 'Supplier' (with 'ABC Inc. (AB345678)' selected), 'Cards' (set to 'All'), 'Show' (set to 'Items List'), 'Category' (set to 'All'), and 'RYG' (set to 'All'). Below these is a 'Filter By' section with 'Select Operator' and 'Enter Value' fields, a 'Go' button, and a 'Filter' icon. Red arrows point to the 'Supplier' field and the 'Go' button.



*Quick Tip – If the selections are not what was intended to be released you can change the “Filter”. The “Filter” allows the user to select specific criteria for the action they are performing. If the Filter is changed, click on the “Go” button.*

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



Click on the “Item” number and the line will highlight. Click on the “Show Cards” button.

The screenshot shows the 'Release Items List' form with the same filters as above. Below the filter section is a 'Show Cards' button. Below that is a table with the following data:

Sorted by: Item		1 to 1 of 1		
RYG	Item	Description	Total Cards	Total Qty
	0125 004200	Emerson Test	1	1,000

Red arrows point to the 'Show Cards' button and the 'Item' number '0125 004200' in the table. A 'Show Cards' button is also visible at the bottom right of the table area.



*Quick Tip – If an item has more than one supplier, “Auto Assign” will be an option under the “Supplur” column. If left on “Auto Assign, Ultriva will automatically calculate and release the card(s) to the appropriate supplier based on the supplier percentages entered in the supplier set up. If preferred, the supplier can be selected by clicking on the dropdown arrow in the supplier field and choosing the supplier.*

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 “Release” button.

Release Cards List Views Print Export ?

Find Card ID  Release Attach Notes Back To Items Change Filter

Sorted by: Item, Last Received 1 to 3 of 3

<input checked="" type="checkbox"/>	Card ID ↑	Item ↑	Description ↑	Cycle No ↑	Qty On Card	Card Qty	Location Code ↑	Last Received ↑	Supplier
<input checked="" type="checkbox"/>	KCDF4URCNABB	0125 004200	Emerson Test	2	1000	1000		-	-- Auto Assign --
<input checked="" type="checkbox"/>	KCDL6BYCNAZZ	0125 004200	Emerson Test	1	1000	0		-	-- Auto Assign --
<input checked="" type="checkbox"/>	KCDMA6PCNA7R	0125 004200	Emerson Test	0	1000	1000	Dock	12/02/2019	-- Auto Assign --

Release Attach Notes Back To Items Change Filter

### The “Cards Successfully Released”

Release Cards Results How do I?

Back To Items Back To Cards

Following cards were successful

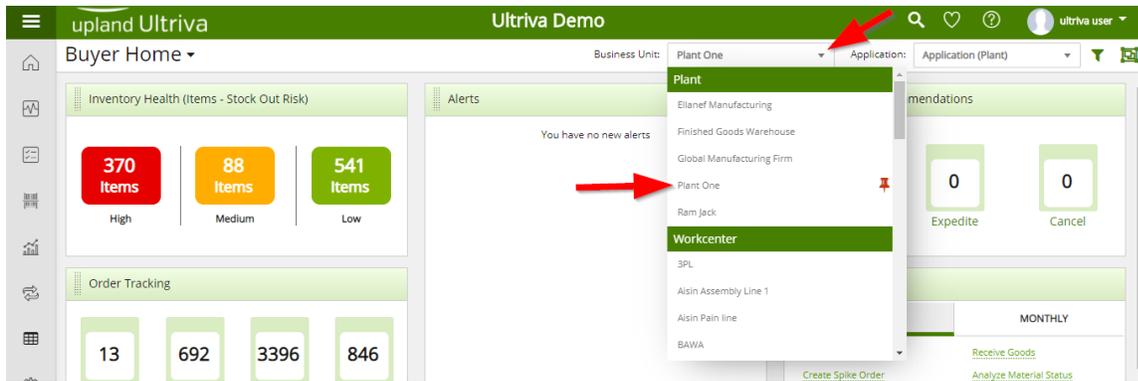
Card ID	Item	Card Qty	Description
KCD4NZWCNADH	242424	100	Released To A&G Machining.
KCD4NZXCNABT	242424	100	Released To LJM Machining Supplies.
KCD4P39CNAWA	242424	100	Released To A&G Machining.
KCD4P5VCNADX	242424	100	Released To LJM Machining Supplies.

## Release Cards - Buyer Queue

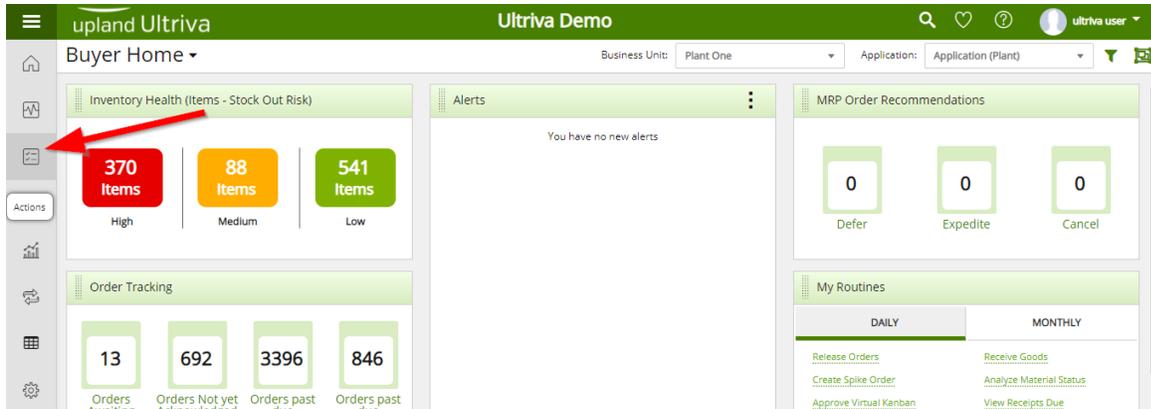


**Important – If Ultriva is integrated with the ERP system, check with your Ultriva Administrator to make sure that manually releasing a card will not create integration failures.**

**Select the “Plant or Workcenter”**



**Click on “Actions”**



**Click on “Buyer Queue”**

The screenshot shows the Ultriva Actions menu with various options like Approve, Adjust Inventory, Print PO, PO Grouping, Put Away, Issue Inventory, Containerize Shipments, Set Expiry Date, Accounts Payable, and Ad hoc Receipts. A red arrow points to the 'Buyer Queue' action.

In the “On Hand” column, click on the number of cards “On Hand”

Buyer Queue Items List

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

Filter By: Select Operator: Enter Value: Go

Sorted by: Item Viewing 11 to 20 of 633 Page 2 of 64

RYG	Item ↑	On Hand		Released		In Process		At Ship Hub		In Transit		Received At Dock		On Hand At Supplier		Others		Description ↑	Total Cards	
		Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty			
	00809602	21	2,838	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0	PRZEGUB AC2600	21
	00810554	8	1,261	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0	PRZEGUB AC 2300	8
	0125 004200	0	0	0	0	0	0	31	31,000	0	0	0	0	0	0	0	0	0.0	Emerson Test	56
	10011025	13	14,869	0	0	1	1,152	0	0	0	0	0	0	0	0	0	0	0.0	TRIPOD GI1700	14
	10013021	2	1,949	0	0	2	1,009	0	0	0	0	0	0	0	0	0	0	0.0	TRIPOD GI2300	4



**Quick Tip** – If an item has more than one supplier, “Auto Assign” will be an option under the “Supplier” column. If left on “Auto Assign, Ultriva will automatically calculate and release the card(s) to the appropriate supplier based on the supplier percentages entered in the supplier set up. If preferred, the supplier can be selected by clicking on the dropdown arrow in the supplier field and choosing the supplier.

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 “Release” button.

**Release Cards List** Views Print Export ?

Find Card ID  Release Attach Notes Back To Items Change Filter

Sorted by: Item, Last Received 1 to 3 of 3

<input checked="" type="checkbox"/>	Card ID ↑	Item ↑	Description ↑	Cycle No ↑	Qty On Card ↑	Card Qty ↑	Location Code ↑	Last Received ↑	Supplier
<input checked="" type="checkbox"/>	KCDF4URCNABB	0125 004200	Emerson Test	2	1000	1000		-	-- Auto Assign --
<input checked="" type="checkbox"/>	KCDL6BYCNAZZ	0125 004200	Emerson Test	1	1000	0		-	-- Auto Assign --
<input checked="" type="checkbox"/>	KCDMA6PCNA7R	0125 004200	Emerson Test	0	1000	1000	Dock	12/02/2019	-- Auto Assign --

Release Attach Notes Back To Items Change Filter

The “Cards Successfully Released”

**Release Cards Results** How do I? Back To Buyer Queue

Following cards were successful

Card ID	Item	Card Qty	Description
KCD4NGCCNANN	24680	100	Released To A&G Machining.
KCD4NMFCAJ9	24680	100	Released To A&G Machining.
KCD4NMGCNAD4	24680	100	Released To A&G Machining.
KCD4NG9CNAME	24680	100	Released To A&G Machining.

## Release Cards - Buyer Status



**Important – If Ultriva is integrated with the ERP system, check with your Ultriva Administrator to make sure that manually releasing a card will not create integration failures.**

Select the “Plant or Workcenter”

The screenshot shows the Ultriva Buyer Home interface. The top navigation bar includes 'upland Ultriva' and 'Ultriva Demo'. The 'Business Unit' dropdown menu is open, displaying a list of options: Plant, Ellanef Manufacturing, Finished Goods Warehouse, Global Manufacturing Firm, Plant One (highlighted with a red arrow), Ram Jack, Workcenter, 3PL, Aisin Assembly Line 1, Aisin Pain line, and BAWA. The main dashboard area contains several widgets: 'Inventory Health (Items - Stock Out Risk)' with 370 High, 88 Medium, and 541 Low items; 'Alerts' showing 'You have no new alerts'; 'Order Tracking' with 13, 692, 3396, and 846 items; and 'MRP Order Recommendations' with 0 Expedite and 0 Cancel items.

Click on “Reports”

The screenshot shows the Ultriva Buyer Home interface with the 'Reports' button highlighted in the left sidebar. A red arrow points to the 'Reports' button. The main dashboard area contains several widgets: 'Inventory Health (Items - Stock Out Risk)' with 368 High, 87 Medium, and 543 Low items; 'Alerts' showing 'You have no new alerts'; 'Order Tracking' with 22, 682, 966, and 836 items; and 'MRP Order Recommendations' with 0 Defer, 0 Expedite, and 0 Cancel items. The 'My Routines' section is visible, showing options for 'Release Orders', 'Create Spike Order', 'Approve Virtual Kanban', 'Receive Goods', 'Analyze Material Status', and 'View Receipts Due'.

Click on “Buyer Status”

The screenshot shows the 'Reports' section in Ultriva. The 'Buyer Reports' dropdown is expanded, and the 'Buyer Status' report is highlighted with a red arrow. The report description is 'Shows distribution of Card for each item'. Other reports include '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).

Click on the “Supplier” field and Press on the spacebar or start to type the supplier name and a list of the suppliers will appear. Select the “Supplier”.

Buyer Status Report

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

Buyer Status Report

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

RYG	Item	In Process	At Ship Hub	In Transit	Received At Dock	On Hand At Supplier	Others	Description	Supplier Item No.	Min Order Cards	Total Cards
0125	004200	0	0	0	0	0	0	Emerson Test	0125 004200	0	23
0	0	0	0	0	0	0	0	0.0 Quest Main Bearing	ULT-001-0454-00S	5	15
0	0	0	0	0	0	0	0	0.0 Quest Main Bearing	ULT-001-0454-00-1	13	18

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 released.*

Buyer Status Report

The “**Buyer Status Report**” appears. In the **On Hand** column, click on the **number of cards** “**On Hand**”

Buyer Status Report Print Export ?

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

Item: Equal To: ULT-001-0454-00 Go

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					
	ULT-001-0454-00	15	2,740	0	0	0	0	0	0	0	0	0	0	0	0	0.0	Quest Main Bearing	ULT-001-0454-005	5	15



**Quick Tip** – If an item has more than one supplier, “Auto Assign” will be an option under the “Supplier” column. If left on “Auto Assign, Ultriva will automatically calculate and release the card(s) to the appropriate supplier based on the supplier percentages entered in the supplier set up. If preferred, the supplier can be selected by clicking on the dropdown arrow in the supplier field and choosing the supplier.

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 “Release” button.

Release Cards List Views Print Export ?

Find Card ID:  Release Attach Notes Back To Items Change Filter

Sorted by: Item, Last Received 1 to 3 of 3

<input type="checkbox"/>	Card ID ↑	Item ↑	Description ↑	Cycle No ↑	Qty On Card	Card Qty	Location Code ↑	Last Received ↑	Supplier
<input checked="" type="checkbox"/>	KCDF4URCNABB	0125 004200	Emerson Test	2	1000	1000		-	-- Auto Assign --
<input checked="" type="checkbox"/>	KCDL6BYCNAZZ	0125 004200	Emerson Test	1	1000	0		-	-- Auto Assign --
<input checked="" type="checkbox"/>	KCDMA6PCNA7R	0125 004200	Emerson Test	0	1000	1000	Dock	12/02/2019	-- Auto Assign --

Release Attach Notes Back To Items Change Filter

The “**Cards Successfully Released**”

Release Cards Results How do I? Back To Buyer Status

Following cards were successful

Card ID	Item	Card Qty	Description
KCD4MVCNAAB	24680	50	Released To A&G Machining.
KCD4MVKCNAR9	24680	50	Released To A&G Machining.
KCD4MV7CNAG5	24680	50	Released To A&G Machining.
KCD4MVCNANS	24680	50	Released To A&G Machining.

## Release 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 Release 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 Press on the spacebar or start to type the supplier name and a list of the suppliers will appear. Select the “Supplier”. In this example we will filter for a specific item from a supplier.

Release Items List

Filters Views Print Export

Supplier: A  
Cards: All  
Show: Items List  
Category: All  
RYG: All

Operator: Enter Value [Go]

Show Cards

Viewing 1 to 10 of 229 Page 1 of 23

RYG	Item	Description	Total Cards	Total Qty
00801908202	KOSZYK AC2000	1	3,400	
00801940	KOSZYK AC2600	1	2,300	
00804065201	KORPUS PRZEGUBU AC2000	8	1,319	
00804385	TRIPOD	1	61	

**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.

Release Items List

Filters Views Print Export

Supplier: AAA Inc (VC1234) x  
Cards: All  
Show: Items List  
Category: All  
RYG: All

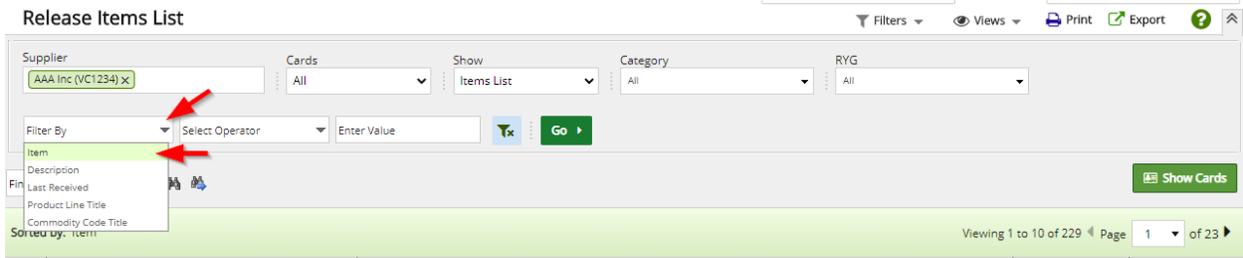
Filter By: Select Operator: Enter Value [Go]

Find Item [Show Cards]

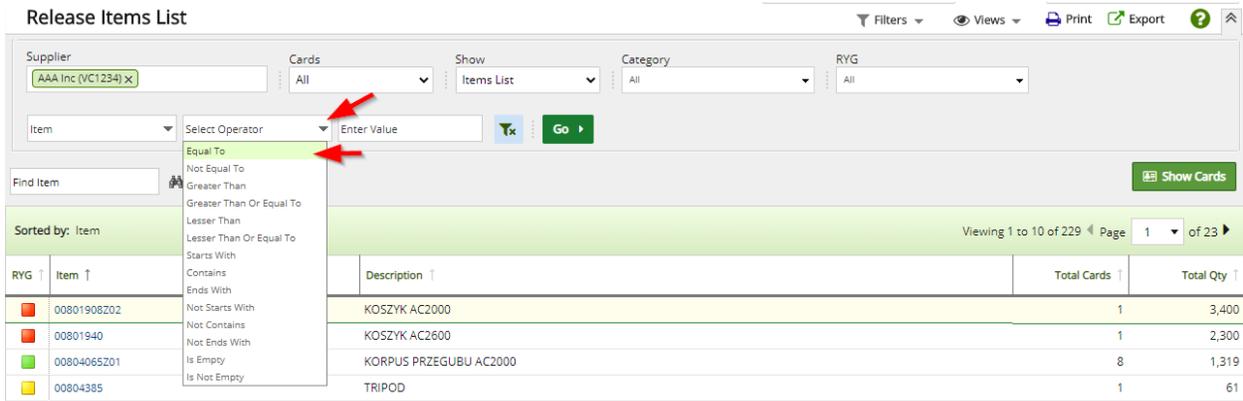


**Quick Tip** – If applicable: The “Filter” can be further defined.

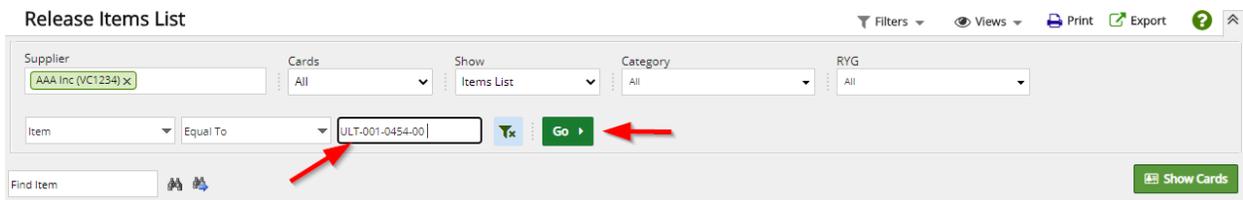
Click on the **dropdown arrow** in the “**Filter By**” field and a **drop down list** appears. Click on a **selection**. *In this example we will select “Item”.*



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”.*



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.*



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

Release Items List Filters Views Print Export ? ⌵

Supplier: AAA Inc (VC1234) x Cards: All Show: Items List Category: All RYG: All

Item: [v] Equal To: [v] ULT-001-0454-00 Tx Go

Show Cards

Sorted by: Item 1 to 1 of 1

RYG	Item	Description	Total Cards	Total Qty
<input type="checkbox"/>	ULT-001-0454-00	Quest Main Bearing	15	2,740

Show Cards



**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 release screen.

[Return to Released Cards Home Screen](#)

[Return to Released Cards Actions Screen](#)