



# Ultriva 7.9.1 Release Notes

By Upland Software

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Version 1.1

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### 1 Supplier MRP Forecasts Scheduled Report

Added a report for Supplier MRP Forecasts Gross Requirements and MRP Forecasts Planned Orders, which can be scheduled to run and configured to be sent to specific users email addresses.

### MRP Forecasts Gross Requirements

Plant: All Plants  Consolidate View: Monthly Items: All Items Category: All Product Line: All Commodity Code: All

Filter By: Select Operator: Enter Value:

Supplier: supnew Plant: All Report: Monthly Items: All Items Date Range: Up to: 2017-09-30 Current ▶

Item ▲	Plant Item No ▾	Plant ▾	Category ▾	On Hand ▾	Past Due ▾	Mar ▾	Apr ▾	May ▾	Jun ▾	Jul ▾	Aug ▾	Sep ▾	Total ▾	Trend
ITNFS240117	ITNFS240117	TCEK-Ram	Forecast	0	390.0	100.0	50.0	0.0	0.0	0.0	0.0	0.0	540.00	
ITNFS240217	ITNFS240217	TCEK-Ram	Forecast	400	390.0	50.0	25.0	25.0	0.0	0.0	0.0	0.0	490.00	
					6.0	4.0	2.0	1.0	0.0	0.0	0.0	0.0	13	

Sorted by: Item 1 to 2 of 2

### Create Schedule for MRP Forecasts Gross Requirements

**1. Set the Filter Condition**

\* Date Range:  Plant:   Consolidate View:

Items:  Category:  Product Line:  Commodity Code:

**2. Set the Schedule Frequency**

\* Frequency:  Daily  Every weekday  Weekly  Every day  Monthly

\* Start Date:  \* Hour:  Exact start time will depend on the job queue activity.

No End Date  Set End Date

\* Report Format:  ?

\* Deliver to: test.klingel Additional users:

\* Report View:

\* Required field

## 2 Grouped Purchase Order Approval Process

POs can be grouped by a buyer and integrated with Customer ERP after the Customer ERP integration is developed.

Refer to Appendix 'A' for details on [Grouped Purchase Order Creation Approval Process](#)

### 3 Reverse Calculate Required Ship Date

Reverse calculate required ship date feature was added to prevent scheduling conflicts.

- a. Required ship date is calculated based on New Required Receive Date by taking into account the Transit Time on the following screens

- i. Buyer Reschedule:

The screenshot shows the 'Reschedule Cards List' interface in the ULTRIVA QA LS MVC4 Test Site. The interface includes a search bar for 'Find Card ID', navigation buttons like 'Reschedule', 'Compute Ship Date', 'Attach Notes', 'Back To Items', and 'Change Filter'. It also has input fields for 'New Required Receive date' (03/16/2017), 'New Transit Time', and 'New Carrier'. A dropdown menu for 'Reschedule Reason' is visible. The main table lists reschedule cards with columns for Card ID, Item, Description, Supplier Name, Reqd Ship, New Reqd Ship Date, Reqd Receive, New Reqd Receive Date, Transit Time, Carrier, and Release Date. The third row is highlighted in green, and a red box highlights the 'New Reqd Ship Date' column for that row, showing the value 04/19/2017.

Card ID	Item	Description	Supplier Name	Reqd Ship	New Reqd Ship Date	Reqd Receive	New Reqd Receive Date	Transit Time	Carrier	Release Date
KCDGMDGTRAX5	ITReschedule	Reschedule Tewsting	supnew	04/18/2017	04/11/2017	04/21/2017	04/21/2017	8		03/07/2017
KCDGMDHTRAZP	ITReschedule	Reschedule Tewsting	supnew	04/18/2017	04/13/2017	04/21/2017	04/21/2017	6		03/07/2017
KCDGMDJTRAVY	ITReschedule	Reschedule Tewsting	supnew	04/18/2017	04/19/2017	04/21/2017	04/21/2017	2		03/07/2017
KCDGMDKTRA2V	ITReschedule	Reschedule Tewsting	supnew	04/18/2017		04/21/2017	04/21/2017	3.00		03/07/2017
KCDGMDLTRA74	ITReschedule	Reschedule Tewsting	supnew	04/18/2017		04/21/2017	04/21/2017	3.00		03/07/2017
KCDGMDPTRA67	ITReschedule	Reschedule Tewsting	supnew	04/18/2017		04/21/2017	04/21/2017	3.00		03/07/2017
KCDGMDRTRA2G	ITReschedule	Reschedule Tewsting	supnew	04/18/2017		04/21/2017	04/21/2017	3.00		03/07/2017
KCDGMDTTRAYL	ITReschedule	Reschedule Tewsting	supnew	04/18/2017		04/21/2017	04/21/2017	3.00		03/07/2017

ii. Spike Orders:

Report > F > Actions > Spike Order Entry Favorite

### Spike Order Entry Results How do I?

[« | Back To Spike Order Entry](#)

Item	Card ID	Supplier	PO #	PO Line #	Release #	Release Line #	Reqd Ship	Reqd Receive	Card Qty	Unit Price	Status Message
ITSpikeNew	KCSGMNTTRAVM	SupMast		0			03/28/2017	03/31/2017	25	5.00	Card Released

[« | Back To Spike Order Entry](#)

iii. Planned orders screen:

MRP recommendation (Defer) cards list How do I?

Filter By  Select Operator  Enter Value

Find PO #

New Due Date:  New Transit Time:  New Carrier:

Reschedule Reason:

<input type="checkbox"/>	Card ID	Item	Description	Supplier Code	PO #	Release #	Card Qty	Reqd Ship	New Reqd Ship Date	Current Reqd Due Date	Suggested Due Date	Transit Time
<input checked="" type="checkbox"/>	KCSGM4FTRA2B	ITNFS240117	Test forecast ordrs	supnew	1201	1201	100	02/27/2017	04/24/2017	02/27/2017	04/28/2017	4.00
<input checked="" type="checkbox"/>	KCSGM4JTRAXK	ITNFS240117	Test forecast ordrs	supnew	1201	1201	100	04/05/2017	04/26/2017	04/11/2017	04/28/2017	2

Sorted by: Item, Current Reqd Due Date 1 to 2 of 2

## 4 Popup to Show Started Job for Work Order

Close Job: WO222CTTRA Machine: Machine1

Item: ITN060116 Description: Test

Op1  
Start Time: 03/16/2017 02:40:21 PM  
Planned: 34 In process: 23 Completed: 0

Started info for operation Op1

First Name	Last Name	Start Qty	Completed Qty	Scrap Qty	Balance Qty	Actual Start Date	Status
Databicware	house	23	0	0	23	03/16/2017 02:40:21 PM	Started

Order Info

Operation Name	Machine Code	Plan Qty	Started Qty	Completed Qty	Balance Qty	Units Scrapped	Plan Start Time	Projected End Date	Actual Start Date	Actual End Date
Op1	Machine1	34	23	0	34	0	01/05/2016 04:49:01 PM	01/05/2016 02:50:06 AM	03/16/2017 02:40:21 PM	-
Op2	M2	34	0	0	34	0	01/09/2016 02:50:06 AM	01/09/2016 04:20:07 AM	-	-

## 5 Releasing Planned Order Screen – added “Item Revision” column

MRP Forecasts Detail

Filter By: Select Operator: Enter Value: Go

Show: Visible MRP Suggestion

Date Range: 2017-08-01~2017-08-31 Product Line: All Commodity Code: All

Release | Attach Notes | Hide Orders | Back

Description	Start Date	Due Date	Exception Code	Suggested Qty	Balance Qty	Order Qty	Unit Price	Supplier	Lead Time	Item Revision
PRZEGUB AC2600	08/19/2017	08/19/2017	50	432	232	232	46.23	ACME, Ltd.	2	A

## 6 Planned Order Screen – “Show” field will auto-complete

The Show box will autocomplete for **My Items/All Items/Selected User**.

**MRP Forecasts**

Supplier:

View: Monthly

Category: All

Product Line: All

Commodity Code: All

Forecasts: Planned Orders

Show: buy

Filter By:

Find Item:

Plant: TCEK-Ram, Supplier:

By Start Date:

Enter Value:  Go

All Items, Date Range: Up to: 2017-09-30, Product Line: All, Commodity Code: All

Item	Supplier Item No.	Category	On Hand	On Order	In Transit	Min Value	Max Value	Past Due	Mar	Apr	May	Jun	Jul	Aug	Sep	To
ITNFS100117	ITNFS100117	Forecast	150	890	0			0	400.0	100.0	0	0	0	0	0	5
ITNFS181116	SUP_ITNFS181116	Forecast	55	1,300	0			0	400.0	0	0	0	0	0	0	40
ITNFS240117	ITNFS240117	Forecast	0	900	0			0	400.0	100.0	0	0	0	0	0	50
ITNFS240217	ITNFS240217	Forecast	400	400	150			0	800.0	200.0	0	0	0	0	0	1,00
								0	16.00	3.00	0	0	0	0	0	

Sorted by: Item 1 to 4 of 4

## 7 Supplier MRP Recommendation Results Will Show Card State

**Supplier MRP recommendation (Expedite) cards list**

Filter By:  Select Operator:  Enter Value:  Go

Find PO #:

New Due Date: 03/31/2017

Reschedule Cards | Attach Notes | Back

Card ID	Item	Description	Business Name	PO #	Release #	Card Qty	Current Reqd Due Date	Suggested Due Date
✓ KCSGM4LTRA5F	ITNFS240117	Test forecast ordrs	TCEK-Ram	1203	1203	100	01/Mar/17	03/31/2017
✓ KCSGM4HTRATU	ITNFS240117	Test forecast ordrs	TCEK-Ram	1203	1203	100	31/Mar/17	03/31/2017

After clicking Reschedule Cards, the Card State is shown in the Description.

**Supplier MRP Recommendation Results**

Card Id/Recommendation Id	Item	Description
KCSGM4LTRA5F	ITNFS240117	Card Reschedule requested Successfully.
KCSGM4HTRATU	ITNFS240117	Card not Accepted

Cards state:

<input type="checkbox"/>	KCDGM8UTRADT	Released	1	100	1	03/01/2017 12:20:25 PM	03/01/2017	Infinite
<input type="checkbox"/>	KCDGM8VTRANR	Released	1	100	22	03/01/2017 01:56:09 PM	03/01/2017	Infinite
<input type="checkbox"/>	KCDGM8WTRAHL	Released	1	100	77	03/01/2017 01:57:11 PM	03/01/2017	Infinite
<input type="checkbox"/>	KCDGM9BTRAZH	Released	1	100	100	03/01/2017 02:45:01 PM	03/01/2017	Infinite
<input type="checkbox"/>	KCDGM9ETRAUQ	Released	1	100	100	03/01/2017 02:46:46 PM	03/01/2017	Infinite
<input checked="" type="checkbox"/>	KCSGM4FTRA2B	Released	1	100	100	03/16/2017 02:33:57 PM	02/27/2017	0
<input checked="" type="checkbox"/>	KCSGM4GTRAVE	Released	1	100	100	02/27/2017 10:04:50 AM	02/27/2017	0
<input checked="" type="checkbox"/>	KCSGM4HTRATU	Released	1	100	100	03/01/2017 03:44:14 PM	02/27/2017	0
<input checked="" type="checkbox"/>	KCSGM4JTRAXK	In Process	1	100	100	03/16/2017 02:33:58 PM	02/27/2017	0
<input checked="" type="checkbox"/>	KCSGM4LTRA5F	In Process	1	100	100	03/01/2017 03:45:02 PM	02/27/2017	0

Sorted by: Card ID



## 8 Added Tool Tip on the Auto-Resize Report to Show Consumption

When you hover over your mouse over the “Last 90 days” for an item, a tool tip pop-up now appears.

Item	Usage Per Day	Last 90 Days	30 Day Avg. Std(%)	S/X	Sugg. Usage Suggested
<input type="checkbox"/> IT200617	100	9.7556	9.75556	9.4461	9.7556
<input type="checkbox"/> ITLabel	50	1.3667	2.73333	9.3655	1.3667
<input type="checkbox"/> ITN210617					
<input type="checkbox"/> ITPrintLabel					
<input type="checkbox"/> ITReports					
<input type="checkbox"/> ITVirtual					

Usage: ITLabel	
OnDate	Qty
2017-06-12	123.00
2017-06-13	.00
2017-06-19	.00

## 9 Spike Order Cards Can Be Created Based on Quantity On Card and Number of Cards For Forecast and Kanban Items

Forecast Items:

**Spike Order Entry** How do I?

Entries validated successfully

Category: Forecast Items Enter by: Required Receive Date

Please leave blank for order details for integration to create orders in ERP.

Add More Lines | >>
Validate Entries | >> Submit Entries | >>

Item No.	Description	Supplier Name	Qty On Card	Number of Cards	Order Quantity	Unit Price	PO #	PO Line #	Release #	Release Line #	Required Receive Date	Notes
ITFS010317 x	Test Planned orders	supnew	200	1	200	3		0			03/24/2017	

Kanban Items:

**Spike Order Entry** How do I?

Entries validated successfully

Category: Kanban Items Enter by: Required Receive Date

Please leave blank for order details for integration to create orders in ERP.

0 **Add More Lines** | **Validate Entries** | **Submit Entries** |

Item No.	Description	Supplier Name	Qty On Card	Number of Cards	Order Qty	Unit Price	PO #	PO Line #	Release #	Release Line #	Required Receive Date	Notes
ITN200415 x	Test Notes and attachments	supnew	45	3	135	4		0			03/22/2017	

10 **“Item” Renamed to “Supplier Item No” on Supplier Reschedule Request Items List Screen**

The “Item” column header on the Reschedule Request Items List screen as renamed to “Supplier Item No” to improve clarity / ease of use.

**Reschedule Request Items List** Filters Views How do I?

Plant: All Plants Cards: All Show: Items List Category: All RYG: All

Filter By: Select Operator: Enter Value: **Go**

Find Supplier Item No. **Show Cards** |

RYG	Supplier Item No	Description	Plant Item No	Total Cards	Total Qty	Plant
Red	00805893	TRIPOD AAR2600	00805893	3	2,352	Plant One
Yellow	13-61617/021-0164-00	Part 234	ULT-021-0164-00	2	6,804	Plant One

## 11 Add Columns “Category” and “Supplier Name” to On Hand Inventory Summary Report

Two new columns were added to the On-Hand Inventory Summary Report to allow for improved clarity / ease of use: “Category” and “Supplier Name”.

**On Hand Inventory Summary** Views [How do I?](#)

Plant: **DatabizWarehouse**, On Date: **06/22/2017** Change Filter

Plant Name ▲	Item ▲	Location Code ▲	Category ▼	Supplier Name ▼	Supplier Code ▼	Units on Hand ▼	Unit Price ▼	On Hand Cost	Avg. On Hand Card Age ▼
DatabizWarehouse	dkit2501		Kanban	dkwork2	wwwwww	800	0.00	0.0000	514
DatabizWarehouse	dkwcit0502		Kanban	dkwork2	wwwwww	1,200	0.00	0.0000	504
DatabizWarehouse	dkwcit0802		Kanban	dkwork2	wwwwww	1,200	0.00	0.0000	500
DatabizWarehouse	IT180517	Loc180517	Kanban	DrillCell	ttt	463	0.00	0.0000	30

## 12 Bug Fixes

- Fixed shipped card quantity bug for Ship by Box when Recalling shipped cards.
- If Console Ship is enabled, fixed shipped card quantity with partial ship when card is recalled from console state.
- Fixed OEE report to correctly show 'operator efficiency total completed' units.
- Fixed an issue if more than 3 files were attached for Request Quality Approval.
- Fixed exporting the search results for searched supplier name.
- Fixed issue where a card could be picked more than once for a picklist ID.
- Fixed create picklist with add filter.
- Fixed Close order issue when all operations done.
- Fixed issue with required ship date when cards released through Item / Cards / Add Remove Cards / Adjust Loopsizes.
- Fixed removing wrong status message when cards released through item loopsize for Required Ship/ Required Receive is greater than today.
- Fixed issue where Supplier Reschedule Request was not taking the plant holidays into account.
- Fixed Card status message for Expedited cards on the MRP Recommendation screen.
- In the Material Certificate Approval Process, the child card is now inheriting the Master Certificate Approval from the parent card.
- Fixed issue with applying a filter on the Print Item List view icon.
- Fixed issue with creating picklist with add filter.
- Fixed display issue where remaining balance quantity showed negative when starting operation.
- Fixed quality check required count at Quality Approval in Work Orders.
- Fixed SetPO issue with SupplierPOReleaseLineNum when SupplierPOReleaseNum was

empty.

- Fixed issue with validating PO for RFQ Item.
- Fixed issue where start qty and balance qty was not updated after scrapped qty at route info for a work order.
- Fixed screen navigation in MRP Recommendations for Defer/Expedite Orders when resetting a filter.
- Fixed issue where remaining balance qty goes to a negative value at Quality Approval operator for a work order.
- Fixed issue where completed qty shows negative value on the info pop up screen for Quality Approval operator for a work order.
- Fixed issue with Expiry Date temporary cards created through Item / Cards / Add Remove Cards.
- Fixed issue with Default Notes for MRP Forecasts Detail.
- Fixed the issue where Spike orders where maximum Quantity On Card created zero qty card.
- Fixed required ship and receive calculation issue for spike cards when reqship date is changed and the card is in the accepted state.
- Fixed date range validation issue where FROM date was greater than TO date.
- Fixed receive quantity issue when receipt happens as the card is scanned for release, it was defaulting to receiving the card quantity instead of the shipped quantity.
- Fixed status message for BuyerRecall when card is in Accept Recall waiting list.
- Fixed issue for Required Receive Date Calculation when Calendar Days - ON for the configuration setting.
- Fixed filter issue for "All Plants" for Purchase Order Integration Status.
- Fixed header name when creating filter on ship and receive items list.



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# Ultriva 7.9.1 Release Notes

## Appendix A: Virtual (Grouped) Purchase Order Creation and Approval Process

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## 15 Virtual (Grouped) Purchase Order Approval Process

### 15.1 User settings for PO approval:

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#### User screen changes:

Added Purchase Order Approval section with 2 fields: PO Value Limit - textbox  
Supervisors - lookup, multi, plant users

#### Validation:

PO Value Limit textbox has to be empty or to have number  $\geq 0$   
If PO Value Limit  $> 0$  supervisors must be selected, otherwise validation error.  
If PO Value Limit is not a number or  $< 0$  - validation error.  
Supervisors' field might have values even if PO Value limit is blank or 0



## Edit User buyeruser

Last modified on [03/13/2017] by [Test All]

How d

### Personal Information

* First Name:	<input type="text" value="Test"/>	MI:	<input type="text" value=""/>	* Last Name:	<input type="text" value="All"/>
* Work Phone:	<input type="text" value="9848970892"/>	Mobile Phone:	<input type="text" value="9848970892"/>		
* Email ID:	<input type="text" value="agollapudi@uplandsoftware.com"/>	Locale:	<input type="text" value="Not Set"/>		
* Time zone:	<input type="text" value="(GMT+05:30) Chennai, Mumbai, New Delhi"/>				

### Account Information

* User ID:	buyeruser	Business unit:	TCEK-Ram
* Account Type:	<input type="text" value="Plant Administrators"/>	Show Privilege	<input type="text" value="BC240516"/>
Skip Lot Plan:	<input type="text" value="-- Select --"/>		

### Purchase Order Approval

Virtual PO Value Limit:	<input type="text" value="1000"/>	Supervisors:	<input type="text" value="supervisor1 x"/>
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### Password Information

If you enable SSO for this user then Password and other security details are managed in your Identity Provider

Password must be greater than 8 character(s).  
Password must contain at least 1 number, at least 1 uppercase character(s), at least 1 lowercase character(s) and at least 1 punctuation character(s).  
Every 90 days your Password will expire.

## 15.2 Virtual (Grouped) PO creation process:

Menu item: Buyer Actions -> Virtual (Grouped) Purchase Order.  
 Here we can review created Virtual (Grouped) POs:

### Virtual PO List How do I?

Supplier:  Status:  \* Create Date:

Filter By:  Select Operator:  Enter Value:

Find PO #

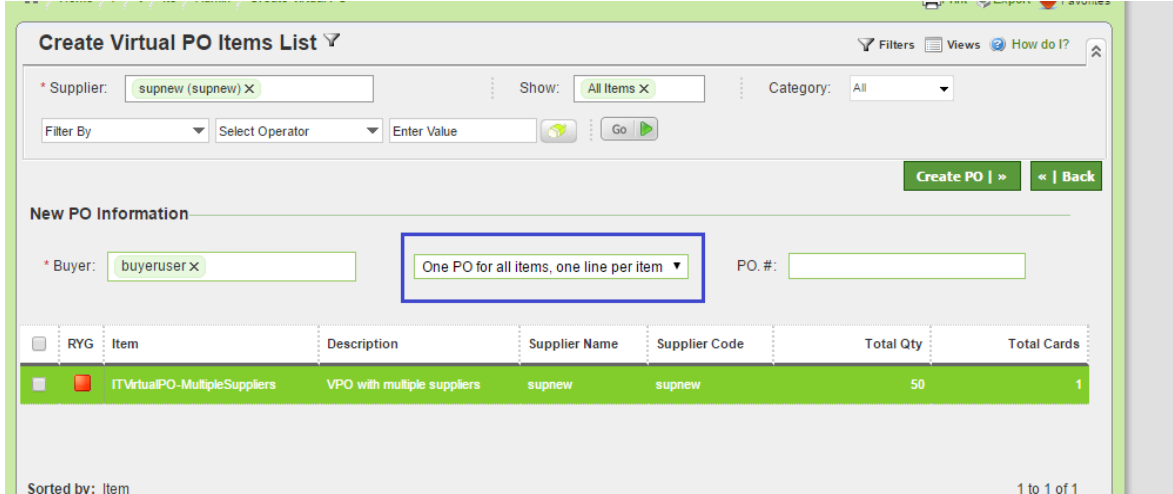
PO #	PO ID	Create Date	Created By	Buyer	Price	Status	Supplier Name	Supplier Code	
	VPO2224DTRA	02/20/2017	buyeruser	BC240516 Test All	750	Approved	supnew	supnew	▼
	VPO2224ETRA	02/27/2017	buyeruser	BC240516 Test All	1000	Rejected	supnew	supnew	▼
	VPO2224FTRA	02/27/2017	buyeruser	BC240516 Test All	1000	Canceled	supnew	supnew	▼
	VPO2224GTRA	02/27/2017	buyeruser	BC240516 Test All	1375	WaitingForApproval	supnew	supnew	▼
	VPO2224HTRA	02/27/2017	buyeruser	BC240516 Test All	750	WaitingForApproval	supnew	supnew	▼
	VPO2224JTRA	02/28/2017	buyeruser	BC240516 Test All	0	Approved	supnew	supnew	▼
	VPO2224RTRA	02/28/2017	buyeruser	BC240516 Test All	250	Approved	supnew	supnew	▼
1111_1	VPO2224STRA	02/28/2017	buyeruser	BC240516 Test All	1750	Approved	supnew	supnew	▼
1122	VPO2224UTRA	02/28/2017	buyeruser	BC240516 Test All	1250	WaitingForApproval	supnew	supnew	▼
112233_1	VPO2224WTRA	02/28/2017	buyeruser	BC240516 Test All	1000	Approved	supnew	supnew	▼
112233_2	VPO2224XTRA	02/28/2017	buyeruser	BC240516 Test All	1000	Approved	supnew	supnew	▼
1122_1	VPO22256TRA	03/01/2017	buyeruser	BC240516	1500	WaitingForApproval	supnew	supnew	▼

To create a new Virtual (Grouped) PO click on Create single Virtual (Grouped) PO or Create Multiple Virtual (Grouped) POs button:

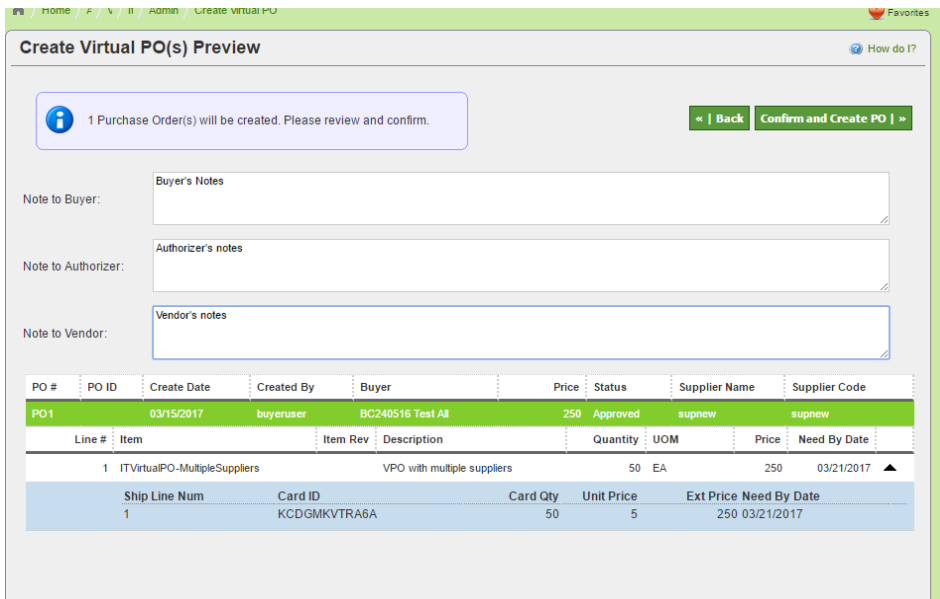
### 15.3 Create Virtual (Grouped) PO through single Virtual (Grouped) PO:

Here we see a list of items with cards in status Waiting For PO (same as sep PO action) but not yet added to any Virtual (Grouped) PO.

Supplier in this filter is mandatory field.



To create Virtual (Grouped) PO, Buyer must be selected, PO # is optional. Buyer user should have PO Value limit and Supervisors should be set in User configuration. Next screen is preview for Virtual (Grouped) PO. Here the user can add a header note to buyer, note to authorizer and note to vendor:



After the user clicks Confirm and Create PO, a Virtual (Grouped) PO will be created:

**Create Virtual PO Results**

1 Purchase Order(s) has been created.

[← Back](#)   [← Back to POs List](#)

Note to Buyer: Buyer's Notes  
 Note to Authorizer: Authorizer's notes  
 Note to Vendor: Vendor's notes

PO #	PO ID	Create Date	Created By	Buyer	Price	Status	Supplier Name	Supplier Code
PO1	VPO2225CTRA	03/15/2017	buyeruser	BC240516 Test All	250	Approved	supnew	supnew

Line #	Item	Item Rev	Description	Quantity	UOM	Price	Need By Date
1	ITVirtualPO-MultipleSuppliers		VPO with multiple suppliers	50	EA	250	03/21/2017

Ship Line Num	Card ID	Card Qty	Unit Price	Ext Price	Need By Date
1	KCDGMKVTRA6A	50	5	250	03/21/2017

If total PO value is less than PO Value Limit for the buyer (not for the person who actually creates a Virtual (Grouped) PO but for the **selected buyer user**) a PO will be created in status Approved.

If PO value is greater than buyer's PO Value limit, a Virtual (Grouped) PO will be created in status Waiting For Approval.

On Virtual (Grouped) PO List page, a **Supervisor** can select POs awaiting his/her approval:

**Virtual PO List**

Supplier: All Suppliers   Status: All   \* Create Date: 03/15/2017-03/15/2017

Filter By: Select Operator: Enter Value: [Go](#)

[Find PO #](#)   [Create multiple Virtual POs](#)   [Create single Virtual PO](#)   [PO Details](#)

PO #	PO ID	Create Date	Created By	Buyer	Price	Status	Supplier Name	Supplier Code
	VPO2225DTRA	03/15/2017	buyeruser	BC240516	1750	WaitingForApproval	supnew	supnew
PO1	VPO2225CTRA	03/15/2017	buyeruser	BC240516	250	Approved	supnew	supnew

Sorted by: PO #   1 to 2 of 2

On the PO Details page, if this PO requires this user's approval, they will have 3 options: Approve, Reject and Cancel.

The screenshot shows the 'View Virtual PO' page with the following elements:

- Navigation: Admin > Actions > Virtual PO
- Buttons: Approve PO, Reject PO, Cancel PO, << | Back
- Action reason: A text input field.
- Notes: Note to Buyer (Buyer's notes), Note to Authorizer (Authorize Notes), Note to Vendor (Vendor notes).
- PO Summary Table:
 

PO #	PO ID	Create Date	Created By	Buyer	Price	Status	Supplier Name	Supplier Code
	VPO2225DTRA	03/15/2017	buyeruser	BC240516	1750	WaitingForApproval	supnew	supnew
- Item Details Table:
 

Line #	Item	Item Rev	Description	Quantity	UOM	Price	Need By Date
1	ITVirtualPO-MultipleSuppliers		VPO with multiple suppliers	50	EA	250	03/21/2017
<b>Ship Line Num</b>		<b>Card ID</b>	<b>Card Qty</b>	<b>Unit Price</b>	<b>Ext Price Need By Date</b>		
1		KCDGMKWTRAZF	50	5	250	03/21/2017	
2	ITVirtualPO-MultipleSuppliers		VPO with multiple suppliers	50	EA	250	03/21/2017
<b>Ship Line Num</b>		<b>Card ID</b>	<b>Card Qty</b>	<b>Unit Price</b>	<b>Ext Price Need By Date</b>		
1		KCDGMKXTRAXV	50	5	250	03/21/2017	
3	ITVirtualPO-		VPO with multiple suppliers	50	EA	250	03/21/2017

Permissions for Approve/Reject: buyer's supervisor, person to whom buyer's supervisor delegated PO Approval.

POs in status Approved, Reject, Waiting for approval can be moved to status Cancelled.

Permissions for Cancel: buyer, user created PO and buyer's supervisor, person to whom buyer's supervisor delegated PO Approval.

For reject and cancel, the user is required to provide a reason.

PO rejected with reason:

**View Virtual PO** How do I?

**PO updated successfully!**

<< | Back
Next PO | >>

Rejection reason: Reject

Note to Buyer: Buyer's notes  
 Note to Authorizer: Authorize Notes  
 Note to Vendor: Vendor notes

PO #	PO ID	Create Date	Created By	Buyer	Price	Status	Supplier Name	Supplier Code
	VPO2225DTRA	03/15/2017	buyeruser	BC240516	1750	Rejected	supnew	supnew

Line #	Item	Item Rev	Description	Quantity	UOM	Price	Need By Date
1	ITVirtualPO-MultipleSuppliers		VPO with multiple suppliers	50	EA	250	03/21/2017
	<b>Ship Line Num</b>		<b>Card ID</b>	<b>Card Qty</b>	<b>Unit Price</b>	<b>Ext Price</b>	<b>Need By Date</b>
	1			50	5	250	03/21/2017
2	ITVirtualPO-MultipleSuppliers		VPO with multiple suppliers	50	EA	250	03/21/2017
	<b>Ship Line Num</b>		<b>Card ID</b>	<b>Card Qty</b>	<b>Unit Price</b>	<b>Ext Price</b>	<b>Need By Date</b>
	1			50	5	250	03/21/2017

PO can be canceled after:

**View Virtual PO** Cancel PO

Action reason: cancel

Note to Buyer:  
 Note to Authorizer:  
 Note to Vendor:

PO #	PO ID	Create Date	Created By	Buyer	Price	Status	Supplier Name
1122	VPO2224UTRA	02/28/2017					supnew

**QA LS MVC4 Test Site** X

Do you want to cancel this Virtual PO?

Yes
No

Line #	Item	Item Rev	Description	Quantity	UOM	Price	Need By Date
1	ITVirtualPO-MultipleSuppliers						03/06/2017
	<b>Ship Line Num</b>		<b>Card ID</b>	<b>Card Qty</b>	<b>Unit Price</b>	<b>Ext Price</b>	<b>Need By Date</b>
	1		KCDGM7P1RANQ	50	5	250	03/06/2017
	2		KCDGM7RTRAJK	50	5	250	03/06/2017
	3		KCDGM7MTRAGS	50	5	250	03/08/2017
	4		KCDGM7NTRAKQ	50	5	250	03/08/2017
	5		KCDGM7QTRAHZ	50	5	250	03/08/2017

## View Virtual PO

 PO updated successfully! ✕

Cancellation reason: cancel

<< | Back

Note to Buyer:

Note to Authorizer:

Note to Vendor:

PO #	PO ID	Create Date	Created By	Buyer	Price	Status	Supplier Name	Supplier Code
1122	VPO2224UTRA	02/28/2017	buyeruser	BC240516 Test All	1250	Canceled	supnew	supnew

Line #	Item	Item Rev	Description	Quantity	UOM	Price	Need By Date
1	ITVirtualPO-MultipleSuppliers		VPO with multiple suppliers	250	EA	1250	03/06/2017
Ship Line Num	Card ID	Card Qty	Unit Price	Ext Price	Need By Date		
1		50	5	250	03/06/2017		
2		50	5	250	03/06/2017		
3		50	5	250	03/08/2017		
4		50	5	250	03/08/2017		
5		50	5	250	03/08/2017		

## 15.4 Create Virtual (Grouped) PO through single Virtual (Grouped) PO button

### 15.5 One PO for all items, one line per item

Home > Virtual PO > Create Virtual PO

**Create Virtual PO Items List**

\* Supplier:  Show:  Category:

Filter By  Select Operator  Enter Value

**New PO Information**

\* Buyer:   PO #:

<input checked="" type="checkbox"/>	RYG	Item	Description	Supplier Name	Supplier Code	Total Qty	Total Cards
<input checked="" type="checkbox"/>	<span style="color: red;">■</span>	ITVirtualPO-MultipleSuppliers	VPO with multiple suppliers	supnew	supnew	650	13

**Create Virtual PO(s) Preview**

1 Purchase Order(s) will be created. Please review and confirm.

Note to Buyer:

Note to Authorizer:

Note to Vendor:

PO #	PO ID	Create Date	Created By	Buyer	Price	Status	Supplier Name	Supplier Code
		03/15/2017	buyeruser	BC240516 Test All	3250	WaitingForApproval	supnew	supnew

Line #	Item	Item Rev	Description	Quantity	UOM	Price	Need By Date
1	ITVirtualPO-MultipleSuppliers		VPO with multiple suppliers	650	EA	3250	03/21/2017 ▲

Ship Line Num	Card ID	Card Qty	Unit Price	Ext Price	Need By Date
1	KCDGMKWTRAZF	50	5	250	03/21/2017
2	KCDGMKXTRAXV	50	5	250	03/21/2017
3	KCDGMKYTRA8Y	50	5	250	03/21/2017
4	KCDGMKZTRATJ	50	5	250	03/21/2017
5	KCDGML2TRA8E	50	5	250	03/21/2017
6	KCDGML3TRAXB	50	5	250	03/21/2017
7	KCDGML4TRASJ	50	5	250	03/21/2017
8	KCDGML5TRA5P	50	5	250	03/21/2017
9	KCDGML6TRAWV	50	5	250	03/21/2017
10	KCDGML7TRA9Y	50	5	250	03/21/2017
11	KCDGML8TRA7A	50	5	250	03/21/2017
12	KCDGML9TRAYF	50	5	250	03/21/2017
13	KCDGMLATRAYX	50	5	250	03/21/2017



15.6 One PO for all items, one line per card.

Creates one PO for all items and one line per every card.

**Create Virtual PO Items List**

\* Supplier: supnew (supnew) X Show: All Items X Category: All

Filter By Select Operator Enter Value Go

Create PO | >> << | Back

**New PO Information**

\* Buyer: buyeruser x **One PO for all items, one line per card** PO #: 7777

RYG	Item	Description	Supplier Name	Supplier Code	Total Qty	Total Cards
<input checked="" type="checkbox"/>	ITVirtualPO-MultipleSuppliers	VPO with multiple suppliers	supnew	supnew	650	13

**Create Virtual PO(s) Preview**

1 Purchase Order(s) will be created. Please review and confirm.

<< | Back Confirm and Create PO | >>

Note to Buyer:

Note to Authorizer:

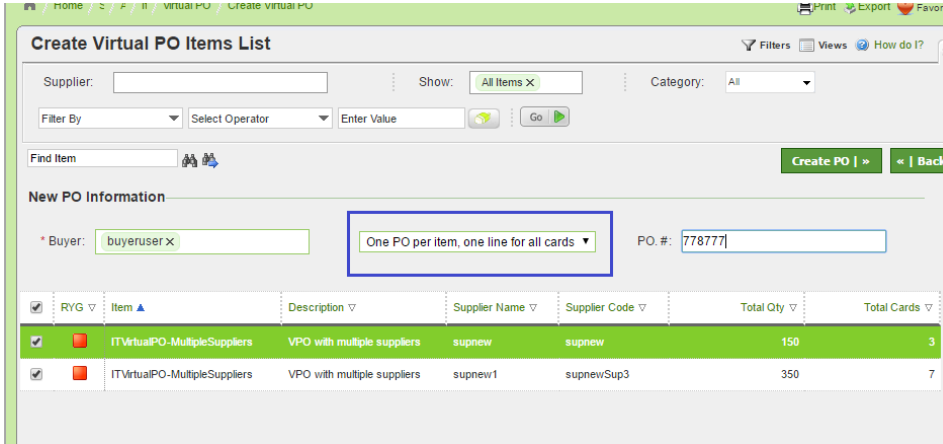
Note to Vendor:

PO #	PO ID	Create Date	Created By	Buyer	Price	Status	Supplier Name	Supplier Code
7777		03/15/2017	buyeruser	BC240516 Test All	3250	WaitingForApproval	supnew	supnew

Line #	Item	Item Rev	Description	Quantity	UOM	Price	Need By Date
1	ITVirtualPO-MultipleSuppliers		VPO with multiple suppliers	50	EA	250	03/21/2017 ▲
	<b>Ship Line Num</b>	<b>Card ID</b>	<b>Card Qty</b>	<b>Unit Price</b>	<b>Ext Price</b>	<b>Need By Date</b>	
	1	KCDGMKWTRAZF	50	5	250	03/21/2017	
2	ITVirtualPO-MultipleSuppliers		VPO with multiple suppliers	50	EA	250	03/21/2017 ▼
3	ITVirtualPO-MultipleSuppliers		VPO with multiple suppliers	50	EA	250	03/21/2017 ▼
4	ITVirtualPO-MultipleSuppliers		VPO with multiple suppliers	50	EA	250	03/21/2017 ▼
5	ITVirtualPO-MultipleSuppliers		VPO with multiple suppliers	50	EA	250	03/21/2017 ▼
6	ITVirtualPO-MultipleSuppliers		VPO with multiple suppliers	50	EA	250	03/21/2017 ▼
7	ITVirtualPO-MultipleSuppliers		VPO with multiple suppliers	50	EA	250	03/21/2017 ▼
8	ITVirtualPO-MultipleSuppliers		VPO with multiple suppliers	50	EA	250	03/21/2017 ▼
9	ITVirtualPO-MultipleSuppliers		VPO with multiple suppliers	50	EA	250	03/21/2017 ▼
10	ITVirtualPO-MultipleSuppliers		VPO with multiple suppliers	50	EA	250	03/21/2017 ▼

15.7 One PO for one item, one line for all cards

Creates one PO per every item(like PO#\_1,PO#\_2..etc) and one line for all cards.



2 Purchase Order(s) will be created. Please review and confirm.

Note to Buyer:

Note to Authorizer:

Note to Vendor:

PO #	PO ID	Create Date	Created By	Buyer	Price	Status	Supplier Name	Supplier Code																																																																																											
778777_1		03/15/2017	buyeruser	BC240516 Test All	2500	WaitingForApproval	supnew	supnew																																																																																											
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<table border="1"> <thead> <tr> <th>Ship Line Num</th> <th>Card ID</th> <th>Card Qty</th> <th>Unit Price</th> <th>Ext Price</th> <th>Need By Date</th> </tr> </thead> <tbody> <tr><td>1</td><td>KCDGMLQTRA33</td><td>50</td><td>5</td><td>250</td><td>03/21/2017</td></tr> <tr><td>2</td><td>KCDGMLRTRAYH</td><td>50</td><td>5</td><td>250</td><td>03/21/2017</td></tr> <tr><td>3</td><td>KCDGMLSTRA7C</td><td>50</td><td>5</td><td>250</td><td>03/21/2017</td></tr> <tr><td>4</td><td>KCDGMLHTRA3N</td><td>50</td><td>5</td><td>250</td><td>03/23/2017</td></tr> <tr><td>5</td><td>KCDGMLJTRA7Z</td><td>50</td><td>5</td><td>250</td><td>03/23/2017</td></tr> <tr><td>6</td><td>KCDGMLKTRAYU</td><td>50</td><td>5</td><td>250</td><td>03/23/2017</td></tr> <tr><td>7</td><td>KCDGMLLTRAV5</td><td>50</td><td>5</td><td>250</td><td>03/23/2017</td></tr> </tbody> </table>									Ship Line Num	Card ID	Card Qty	Unit Price	Ext Price	Need By Date	1	KCDGMLQTRA33	50	5	250	03/21/2017	2	KCDGMLRTRAYH	50	5	250	03/21/2017	3	KCDGMLSTRA7C	50	5	250	03/21/2017	4	KCDGMLHTRA3N	50	5	250	03/23/2017	5	KCDGMLJTRA7Z	50	5	250	03/23/2017	6	KCDGMLKTRAYU	50	5	250	03/23/2017	7	KCDGMLLTRAV5	50	5	250	03/23/2017																									
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7	KCDGMLLTRAV5	50	5	250	03/23/2017																																																																												

15.8 One PO for one item, one line per card

Creates one PO per every item(like PO#\_1,PO#\_2..etc) and one line per card.

**Create Virtual PO Items List**

Supplier:  Show: All Items X Category: All

Filter By  Select Operator  Enter Value

Find Item

**New PO Information**

\* Buyer:  One PO per item, one line per card PO #:

<input checked="" type="checkbox"/>	RYG	Item	Description	Supplier Name	Supplier Code	Total Qty	Total Cards
<input checked="" type="checkbox"/>	<span style="color: red;">■</span>	ITVirtualPO-MultipleSuppliers	VPO with multiple suppliers	supnew	supnew	150	3
<input checked="" type="checkbox"/>	<span style="color: red;">■</span>	ITVirtualPO-MultipleSuppliers	VPO with multiple suppliers	supnew1	supnewSup3	350	7

Sorted by: Item 1 to 2 of 2

2 Purchase Order(s) will be created. Please review and confirm.

Note to Buyer:

Note to Authorizer:

Note to Vendor:

PO #	PO ID	Create Date	Created By	Buyer	Price	Status	Supplier Name	Supplier Code
55555_1		03/15/2017	buyeruser	BC240516 Test All	750	Approved	supnew	supnew
Line #	Item	Item Rev	Description	Quantity	UOM	Price	Need By Date	
1	ITVirtualPO-MultipleSuppliers		VPO with multiple suppliers	50	EA	250	03/21/2017	▲
Ship Line Num	Card ID	Card Qty	Unit Price	Ext Price	Need By Date			
1	KCDGMLQTRA33	50	5	250	03/21/2017			
2	ITVirtualPO-MultipleSuppliers		VPO with multiple suppliers	50	EA	250	03/21/2017	▼
3	ITVirtualPO-MultipleSuppliers		VPO with multiple suppliers	50	EA	250	03/21/2017	▼
PO #	PO ID	Create Date	Created By	Buyer	Price	Status	Supplier Name	Supplier Code
55555_2		03/15/2017	buyeruser	BC240516 Test All	1750	WaitingForApproval	supnew1	supnewSup3
Line #	Item	Item Rev	Description	Quantity	UOM	Price	Need By Date	
1	ITVirtualPO-MultipleSuppliers		VPO with multiple suppliers	50	EA	250	03/23/2017	▲
Ship Line Num	Card ID	Card Qty	Unit Price	Ext Price	Need By Date			
1	KCDGMLHTRA3N	50	5	250	03/23/2017			
2	ITVirtualPO-MultipleSuppliers		VPO with multiple suppliers	50	EA	250	03/23/2017	▼
3	ITVirtualPO-MultipleSuppliers		VPO with multiple suppliers	50	EA	250	03/23/2017	▼
4	ITVirtualPO-MultipleSuppliers		VPO with multiple suppliers	50	EA	250	03/23/2017	▼
5	ITVirtualPO-MultipleSuppliers		VPO with multiple suppliers	50	EA	250	03/23/2017	▼
6	ITVirtualPO-MultipleSuppliers		VPO with multiple suppliers	50	EA	250	03/23/2017	▼
7	ITVirtualPO-MultipleSuppliers		VPO with multiple suppliers	50	EA	250	03/23/2017	▼

15.9 One PO for all items, one line per item.

Creates one PO for all item and one line per item.

Home / ... / Virtual PO / Create virtual PO

### Create Virtual PO Items List

Supplier:  Show: **All Items X** Category: All

Filter By  Select Operator  Enter Value

Find Item

**New PO Information**

\* Buyer:  One PO for all items, one line per item PO #:

<input checked="" type="checkbox"/>	RYG	Item	Description	Supplier Name	Supplier Code	Total Qty	Total Cards
<input checked="" type="checkbox"/>	<span style="color: red;">■</span>	ITVirtualPO-MultipleSuppliers	VPO with multiple suppliers	supnew	supnew	150	3
<input checked="" type="checkbox"/>	<span style="color: red;">■</span>	ITVirtualPO-MultipleSuppliers	VPO with multiple suppliers	supnew1	supnewSup3	350	7

Sorted by: Item 1 to 2 of 2

### Create Virtual PO(s) Preview

2 Purchase Order(s) will be created. Please review and confirm.

Note to Buyer:

Note to Authorizer:

Note to Vendor:

PO #	PO ID	Create Date	Created By	Buyer	Price	Status	Supplier Name	Supplier Code
99999		03/15/2017	buyeruser	BC240516 Test All	2500	WaitingForApproval	supnew	supnew

Line #	Item	Item Rev	Description	Quantity	UOM	Price	Need By Date
1	ITVirtualPO-MultipleSuppliers		VPO with multiple suppliers	500	EA	2500	03/21/2017

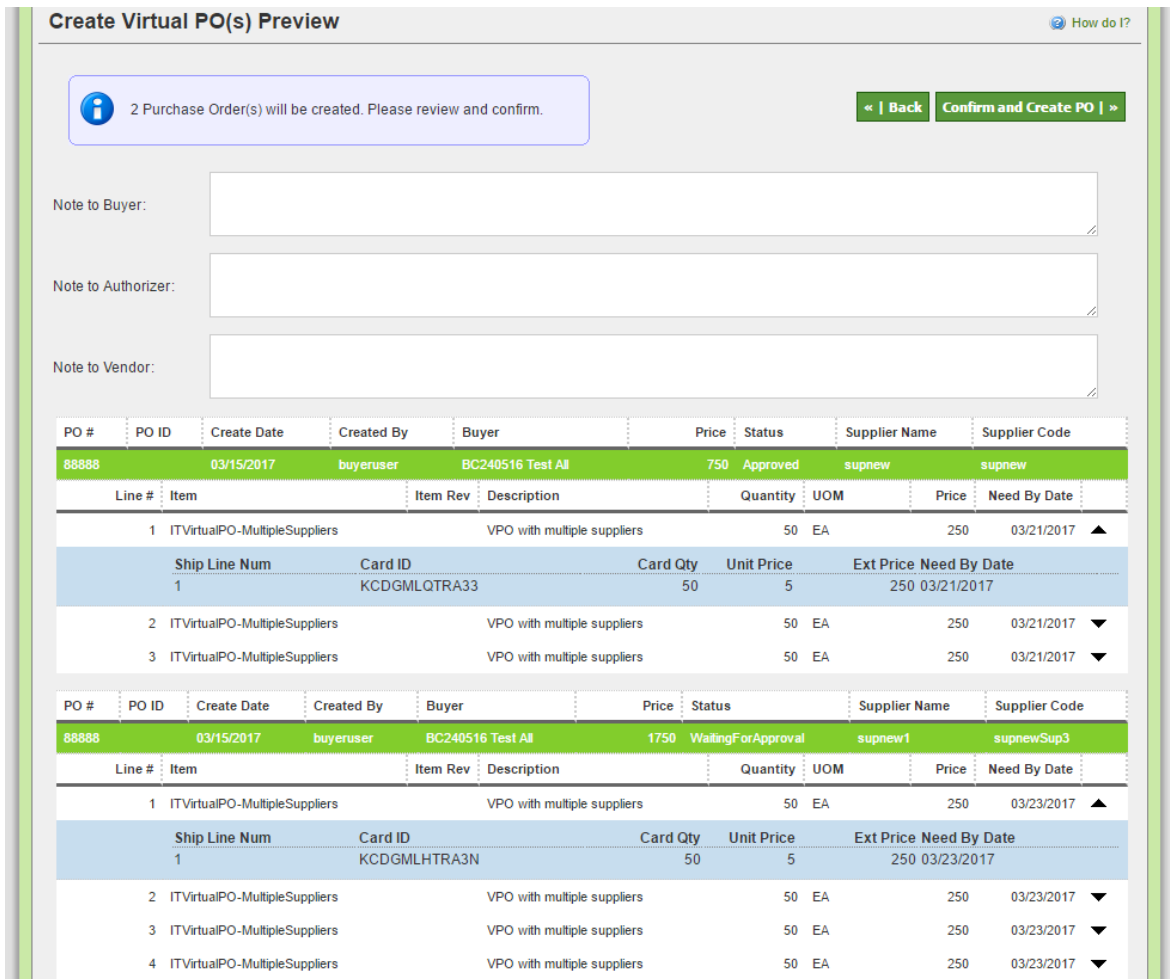
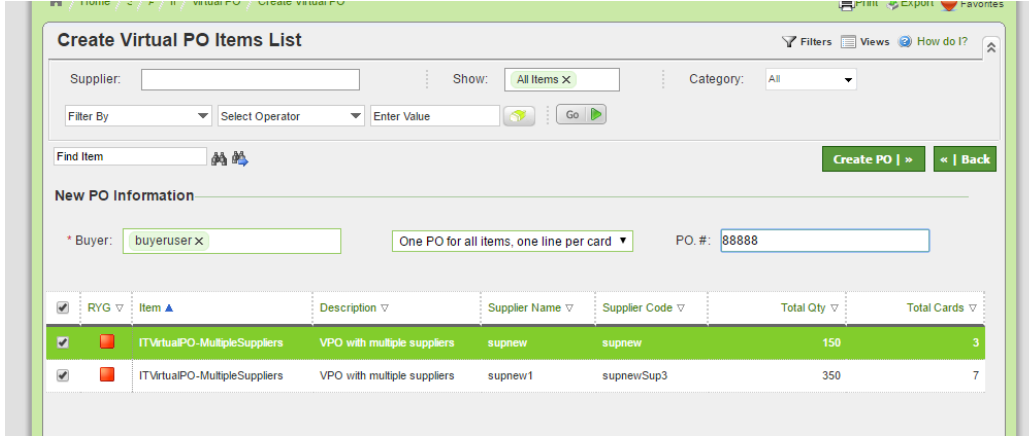
Ship Line Num	Card ID	Card Qty	Unit Price	Ext Price	Need By Date
1	KCDGMLQTRA33	50	5	250	03/21/2017
2	KCDGMLRTRAYH	50	5	250	03/21/2017
3	KCDGMLSTRA7C	50	5	250	03/21/2017
4	KCDGMLHTRA3N	50	5	250	03/23/2017
5	KCDGMLJTRA7Z	50	5	250	03/23/2017
6	KCDGMLKTRAYU	50	5	250	03/23/2017
7	KCDGMLLTRAV5	50	5	250	03/23/2017
8	KCDGMLMTRA28	50	5	250	03/23/2017
9	KCDGMLNTRAZA	50	5	250	03/23/2017
10	KCDGMLPTRAU6	50	5	250	03/23/2017

PO #	PO ID	Create Date	Created By	Buyer	Price	Status	Supplier Name	Supplier Code
99999		03/15/2017	buyeruser	BC240516 Test All	2500	WaitingForApproval	supnew1	supnewSup3

Line #	Item	Item Rev	Description	Quantity	UOM	Price	Need By Date
1	ITVirtualPO-MultipleSuppliers		VPO with multiple suppliers	500	EA	2500	03/21/2017

15.10 One PO for all items, one line per card.

Creates one PO for all item and one line per card.



## 15.11 Delegate Approval

If a supervisor-level user is not available, a delegate user can approve POs:

On “Change My Profile” page, an optional field for Delegate Virtual (Grouped) PO Approval was added as well as a date range in which this exception applies.

Neither are required fields. If the Date Range is entered it must be a valid date range.

The delegate user will be considered as the Approver only during specified date range.

The screenshot shows the 'Change My Profile' page with the following fields and values:

- Personal Information:**
  - First Name: Test
  - MI:
  - Last Name: All
  - Work Phone: 9848970892
  - Mobile Phone: 9848970892
  - Email: agollapudi@uplandsoftware.com
  - User Locale: Not Set
  - Time zone: (GMT+05:30) Chennai, Mumbai, New Delhi
- Delegate Virtual PO approval:**
  - If I am not available those user(s) can approve POs:
  - Delegate PO Approval: Delegateuser1 x
  - Delegate for Date Range:

Buttons: Save | X | Cancel

\* Required field

## 15.12 PO Integration retry report

Virtual (Grouped) PO data is displayed in the Purchase Order Integration status report as shown below:

**Purchase Order Integration Status Report**

Integration Status: All

Plant: TCEK-Ram

Supplier:

Item:

Buyer:

**Show Report | »**

Processed: 0 Failed: 0 Pending: 5 Success Rate: 0.00%

X Disable

Integration Type: All, Integration Status: All, Date Range: 06/01/2017-06/23/2017, Plant: TCEK-Ram

PO ID	PO #	Supplier Name	Buyer	Last Action Time	Status	Type
VPO2226LTRA		supnew	BC240516 QA Team	06/19/2017 08:08:32 AM	Waiting	Purchase Order Approved Status
VPO2226NTRA		supnew	BC240516 QA Team	06/21/2017 01:16:10 PM	Waiting	Purchase Order Approved Status
VPO2226PTRA		supnew	BC240516 QA Team	06/21/2017 03:07:13 PM	Waiting	Purchase Order Approved Status
VPO2226QTRA		supnew1	BC240516 QA Team	06/21/2017 08:12:33 PM	Waiting	Purchase Order Approved Status
VPO2224LTRA		dksupplier123	BC240516 Test All	06/21/2017 10:02:53 PM	Waiting	Purchase Order Approved Status

Sorted by: Last Action Time

1 to 5 of 5

