

Upland Ultriva Release Notes

v10.5



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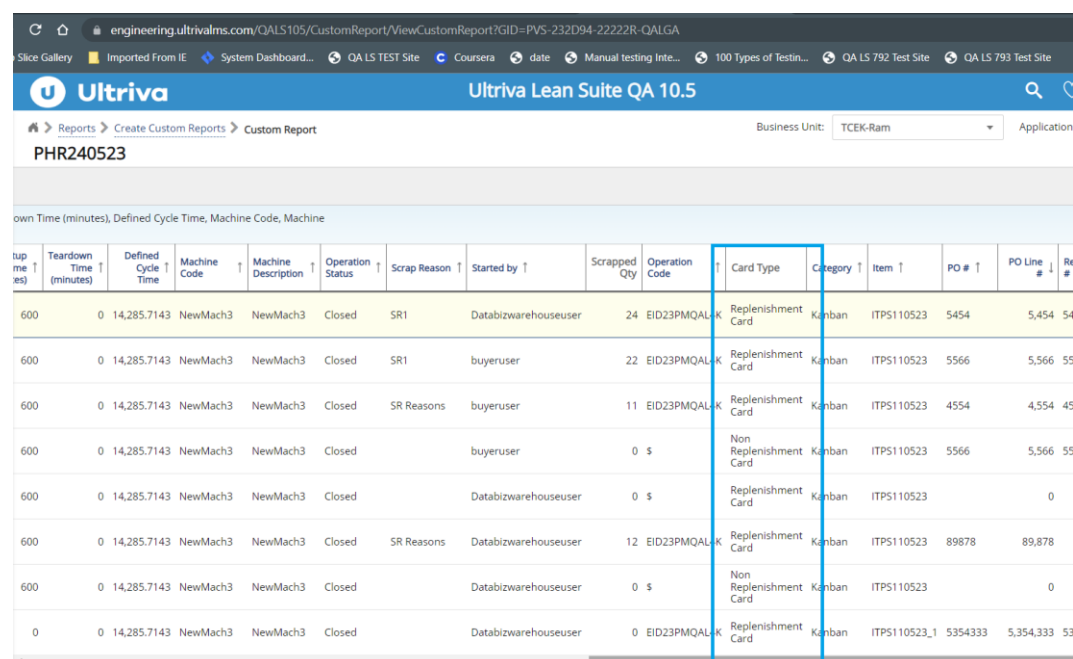
Enhancements and Features

Add 'Card Type' to custom Production History Report

A valuable enhancement has been implemented in the Production History (Custom Report) feature. The enhancement involves the addition of a new attribute called 'Card Type' to both the report results and filter options. This enhancement empowers users to easily identify whether a card is classified as a Replenishment Card or Non-Replenishment Card within the Production History report.

By including the 'Card Type' attribute, users can now generate custom reports that provide detailed insights into the production history of both Replenishment and Non-Replenishment cards. This information helps users analyze and track the performance, status, and trends specific to each card type, enabling better decision-making and enhanced visibility into the production processes.

This enhancement adds a new level of flexibility and clarity to the Production History feature, allowing users to effectively filter and analyze data based on card types. The inclusion of 'Card Type' in the report results and filter options greatly improves the overall user experience and contributes to a more comprehensive understanding of production activities within Ultriva.



| Up Time (min) | Teardown Time (minutes) | Defined Cycle Time | Machine Code | Machine Description | Operation Status | Scrap Reason | Started by | Scrapped Qty | Operation Code | Card Type | Category | Item | PO # | PO Line # | Re # |
|---------------|-------------------------|--------------------|--------------|---------------------|------------------|--------------|----------------------|--------------|----------------|------------------------|----------|--------------|---------|-----------|------|
| 600 | 0 | 14,285.7143 | NewMach3 | NewMach3 | Closed | SR1 | Databizwarehouseuser | 24 | EID23PMQAL-K | Replenishment Card | Kanban | ITP5110523 | 5454 | 5,454 | 54 |
| 600 | 0 | 14,285.7143 | NewMach3 | NewMach3 | Closed | SR1 | buyeruser | 22 | EID23PMQAL-K | Replenishment Card | Kanban | ITP5110523 | 5566 | 5,566 | 55 |
| 600 | 0 | 14,285.7143 | NewMach3 | NewMach3 | Closed | SR Reasons | buyeruser | 11 | EID23PMQAL-K | Replenishment Card | Kanban | ITP5110523 | 4554 | 4,554 | 45 |
| 600 | 0 | 14,285.7143 | NewMach3 | NewMach3 | Closed | | buyeruser | 0 | \$ | Non Replenishment Card | Kanban | ITP5110523 | 5566 | 5,566 | 55 |
| 600 | 0 | 14,285.7143 | NewMach3 | NewMach3 | Closed | | Databizwarehouseuser | 0 | \$ | Replenishment Card | Kanban | ITP5110523 | | 0 | |
| 600 | 0 | 14,285.7143 | NewMach3 | NewMach3 | Closed | SR Reasons | Databizwarehouseuser | 12 | EID23PMQAL-K | Replenishment Card | Kanban | ITP5110523 | 89878 | 89,878 | |
| 600 | 0 | 14,285.7143 | NewMach3 | NewMach3 | Closed | | Databizwarehouseuser | 0 | \$ | Non Replenishment Card | Kanban | ITP5110523 | | 0 | |
| 0 | 0 | 14,285.7143 | NewMach3 | NewMach3 | Closed | | Databizwarehouseuser | 0 | EID23PMQAL-K | Replenishment Card | Kanban | ITP5110523_1 | 5354333 | 5,354,333 | 53 |

Disallow Special Characters in Data (Item Sync and new Config)

A significant enhancement has been implemented to ensure data integrity and system stability. The introduction of disallowed special characters in data for Item Sync and the user interface (UI) prevents the use of specific characters that could potentially cause issues.

To facilitate this enhancement, a new system configuration element, "ULTRIVA_REQUEST_VALIDATOR_CHARS," has been introduced. This configuration

allows administrators to specify the special characters that are not allowed in the system.

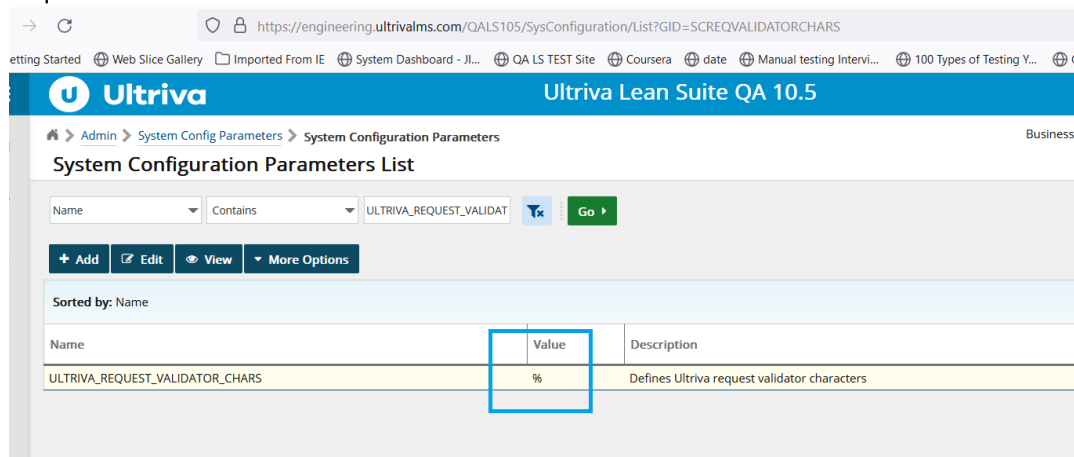
The validation process now includes checking the following fields during Item Sync:

- ItemNo
- ItemDesc
- EBJ_RTPARAMS.ABCCode
- EBJ_RTPARAMS.RevisionNo
- EBJ_RTPARAMS.DrawingNo
- EBJ_RTPARAMS.CT
- EBJ_RTPARAMS.SUBINVENTORY
- LocationCode
- SupplierItemNo
- SupplierItemDesc
- SupplierPoNum
- SupplierPoReleaseNum
- SupplierPoReleaseLineNum

To maintain data integrity and system stability, certain characters such as [=, ?, /, &, @, dot, \$] have been restricted. Additionally, caution is advised against using any part of the login username or password, as it may lead to login issues.

The system has been properly configured to include the special character "%" as part of the system configuration, further enhancing the validation process.

By implementing these measures, Ultriva aims to ensure the reliability, consistency, and security of data within the system, promoting a smooth and error-free user experience.



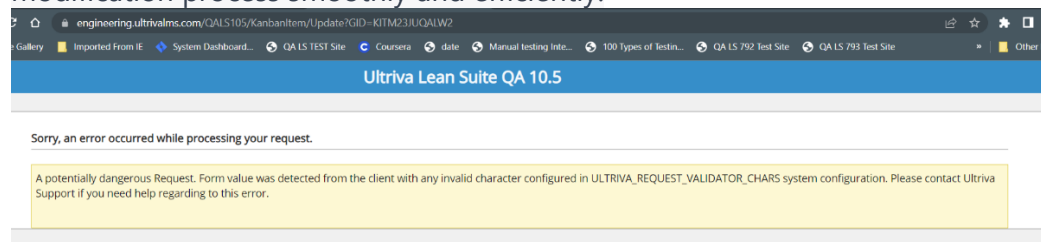
The screenshot displays the 'System Configuration Parameters List' interface. At the top, there's a search bar with 'Name' selected and 'Contains' as the operator. The search term 'ULTRIVA_REQUEST_VALIDAT' is entered. Below the search bar are buttons for '+ Add', 'Edit', 'View', and 'More Options'. The table is sorted by 'Name'. The table has three columns: 'Name', 'Value', and 'Description'. A row is highlighted in yellow, and a blue box is drawn around the 'Value' column for this row, which contains the character '%'. The 'Name' for this row is 'ULTRIVA_REQUEST_VALIDATOR_CHARS' and the 'Description' is 'Defines Ultriva request validator characters'.

| Name | Value | Description |
|---------------------------------|-------|--|
| ULTRIVA_REQUEST_VALIDATOR_CHARS | % | Defines Ultriva request validator characters |

When attempting to add or edit an item that includes the special character "%," the system now provides an informative error message to alert the user about the issue. The error message clearly indicates that the use of the "%" character is not allowed and provides guidance on resolving the error.

By displaying this error message, users are promptly informed about the prohibited character and can take appropriate action to rectify it. This helps maintain data consistency and ensures that item names and details adhere to the necessary formatting rules.

With this improvement, users can easily identify and address any potential issues related to the use of the special character "%," enabling them to proceed with the item creation or modification process smoothly and efficiently.

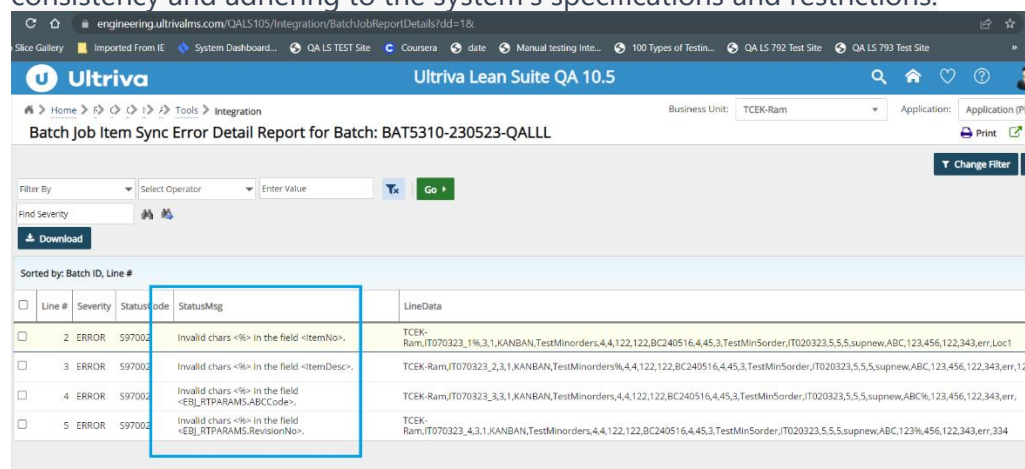


When uploading an item sync file that contains the special character "%," the system now includes appropriate error handling in the batch job status report. If the uploaded file includes the prohibited character "%," the system will detect it during the batch job processing and generate an error message specifically addressing this issue.

The error will be reflected in the batch job status report, providing clear visibility to users about the presence of the special character and the resulting error. This enables users to quickly identify and address any problematic items within the sync file.

By incorporating this error handling mechanism, the system ensures data integrity and accuracy during the item sync process. Users can rely on the batch job status report to identify any issues related to the special character "%," facilitating efficient troubleshooting and resolution.

This enhancement enables users to seamlessly manage item sync files while maintaining data consistency and adhering to the system's specifications and restrictions.

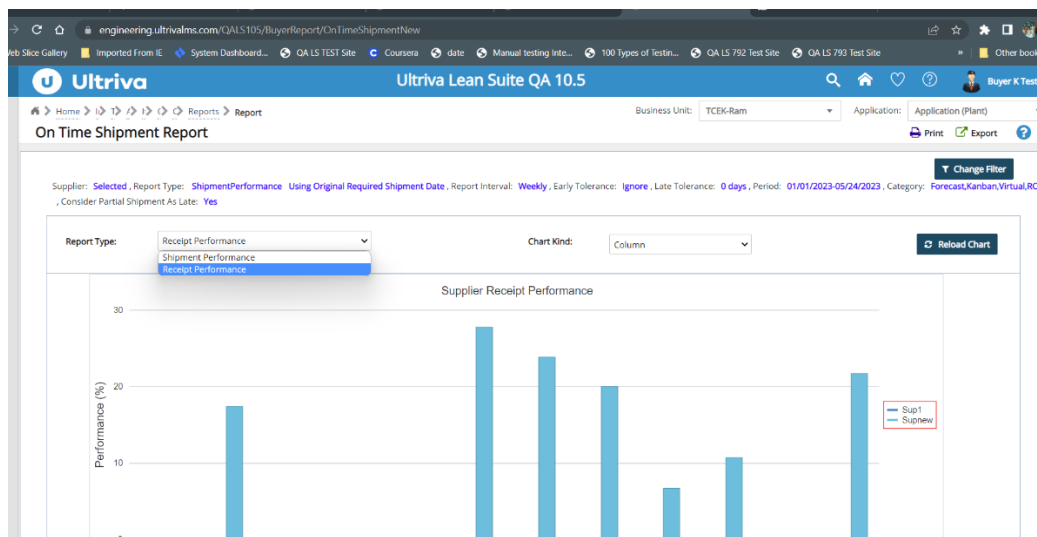


Supplier On-time Report Improvements

The Supplier On-Time report has undergone several improvements, including:

- Updated the report to use a new style, enhancing its visual appearance and usability.
- Introduced a single graph on one page that displays all selected suppliers. Users now can check or uncheck supplier names to dynamically remove or add them to the graph.
- Implemented the option to choose between a line graph or a bar graph dynamically on the report page, providing flexibility in data visualization.
- Moved certain filter choices to the report graph page whenever feasible. This includes options such as Using Original Required Receive Date, Consider Partial Shipment as late, Receipt Performance, and Shipment Performance.

These enhancements aim to enhance the Supplier On-Time report's functionality and user experience.



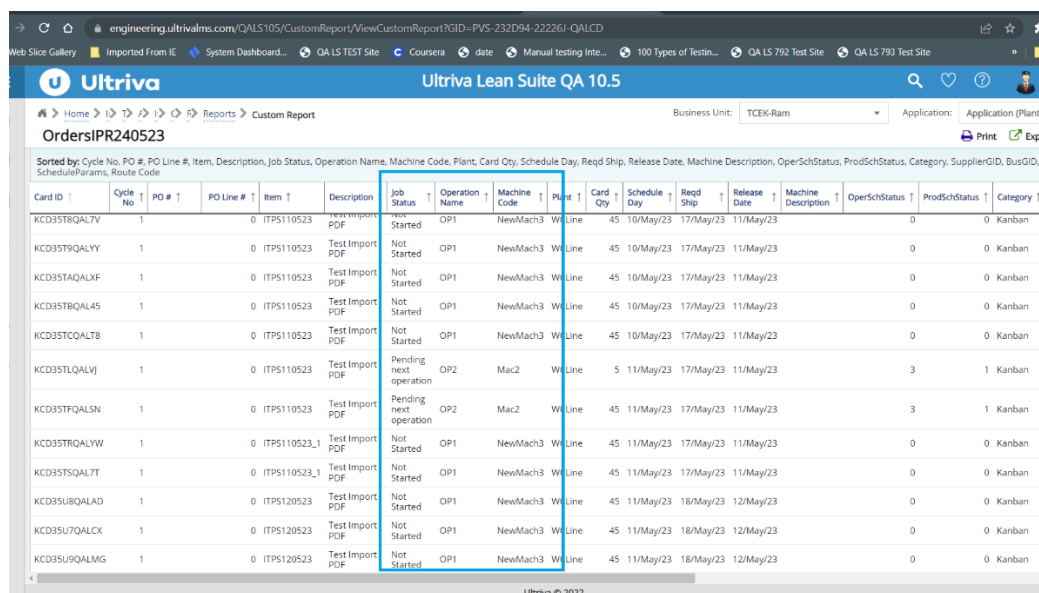
Add additional columns to the custom LFM/OEE report "Orders in Production Custom Report"

An enhancement has been made to the Orders in Production Custom Report to improve the visibility and clarity of job statuses. Specifically, for "Not Started" job statuses and Pending Next Operation, the report now includes the Next Operation and Default Machine name in the Operation Name and Machine Name columns.

By adding these details to the report, the columns will no longer display empty values for the aforementioned job statuses. This enhancement ensures that users have comprehensive information regarding the next operation and the default machine associated with jobs that have not yet started or are awaiting the next operation.

With this improvement, users can effectively track the progress of jobs and gain a better understanding of the workflow. It allows for easier identification of upcoming operations and their respective default machines, promoting smoother production processes and improved decision-making based on the report's data.

Overall, this enhancement enhances the usability and completeness of the Orders in Production Custom Report, empowering users with accurate and detailed information about job statuses and associated operations and machines.



| Card ID | Cycle No | PO Line | Item | Description | Job Status | Operation Name | Machine Code | Plant | Card Qty | Schedule Day | Req'd Ship | Release Date | Machine Description | OperSchStatus | ProdSchStatus | Category |
|--------------|----------|---------|--------------|-----------------|------------------------|----------------|--------------|--------|----------|--------------|------------|--------------|---------------------|---------------|---------------|----------|
| KCD35TRQALV | 1 | 0 | ITPS110523 | Test Import PDF | Not Started | OP1 | NewMach3 | W Line | 45 | 10/May/23 | 17/May/23 | 11/May/23 | | 0 | 0 | Kanban |
| KCD35TRQALY | 1 | 0 | ITPS110523 | Test Import PDF | Not Started | OP1 | NewMach3 | W Line | 45 | 10/May/23 | 17/May/23 | 11/May/23 | | 0 | 0 | Kanban |
| KCD35TAQALXF | 1 | 0 | ITPS110523 | Test Import PDF | Not Started | OP1 | NewMach3 | W Line | 45 | 10/May/23 | 17/May/23 | 11/May/23 | | 0 | 0 | Kanban |
| KCD35TBQAL45 | 1 | 0 | ITPS110523 | Test Import PDF | Not Started | OP1 | NewMach3 | W Line | 45 | 10/May/23 | 17/May/23 | 11/May/23 | | 0 | 0 | Kanban |
| KCD35TOQALT8 | 1 | 0 | ITPS110523 | Test Import PDF | Not Started | OP1 | NewMach3 | W Line | 45 | 10/May/23 | 17/May/23 | 11/May/23 | | 0 | 0 | Kanban |
| KCD35TLQALVJ | 1 | 0 | ITPS110523 | Test Import PDF | Pending next operation | OP2 | Mac2 | W Line | 5 | 11/May/23 | 17/May/23 | 11/May/23 | | 3 | 1 | Kanban |
| KCD35TRQALSN | 1 | 0 | ITPS110523 | Test Import PDF | Pending next operation | OP2 | Mac2 | W Line | 45 | 11/May/23 | 17/May/23 | 11/May/23 | | 3 | 1 | Kanban |
| KCD35TRQALYW | 1 | 0 | ITPS110523_1 | Test Import PDF | Not Started | OP1 | NewMach3 | W Line | 45 | 11/May/23 | 17/May/23 | 11/May/23 | | 0 | 0 | Kanban |
| KCD35TSQAL7T | 1 | 0 | ITPS110523_1 | Test Import PDF | Not Started | OP1 | NewMach3 | W Line | 45 | 11/May/23 | 17/May/23 | 11/May/23 | | 0 | 0 | Kanban |
| KCD35UBQALAD | 1 | 0 | ITPS120523 | Test Import PDF | Not Started | OP1 | NewMach3 | W Line | 45 | 11/May/23 | 18/May/23 | 12/May/23 | | 0 | 0 | Kanban |
| KCD35U7QALCK | 1 | 0 | ITPS120523 | Test Import PDF | Not Started | OP1 | NewMach3 | W Line | 45 | 11/May/23 | 18/May/23 | 12/May/23 | | 0 | 0 | Kanban |
| KCD35U9QALMG | 1 | 0 | ITPS120523 | Test Import PDF | Not Started | OP1 | NewMach3 | W Line | 45 | 11/May/23 | 18/May/23 | 12/May/23 | | 0 | 0 | Kanban |

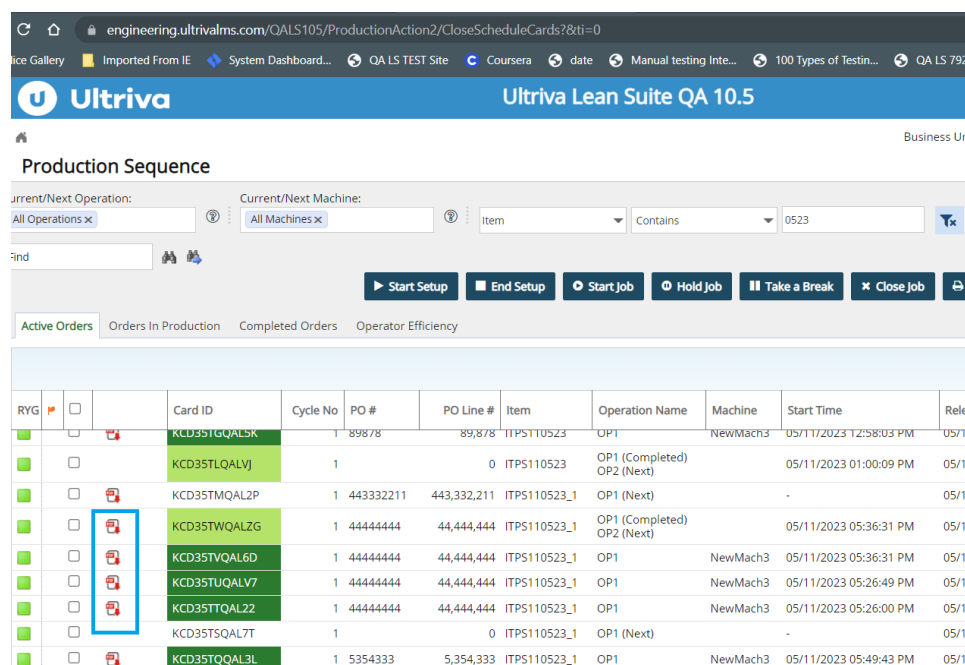
PDF Import enhancements LFM

The custom LFM/OEE report "Orders in Production Custom Report" has undergone significant improvements. Two additional columns, namely Next Operation and Default Machine name, have been incorporated into the report for job statuses such as "Not Started" and "Pending Next Operation." By including these columns, the report eliminates empty values and provides valuable information regarding the next operation and the default machine associated with the respective jobs.

In the PDF Import feature of LFM, enhancements have been implemented in the Batch Job (JobERPImportWOPDF). The following improvements have been made:

- Previously, when multiple jobs (cards) shared the same Workorder number (PO #), the PDF was imported to only one of those cards. However, with the enhancement, the PDF will now be imported to all relevant cards that share the same Workorder number. This ensures that all applicable cards receive the necessary PDF documentation, allowing for accurate and comprehensive record-keeping.

These enhancements in both the custom LFM/OEE report and the PDF Import feature contribute to improved efficiency and accuracy within the LFM system. Users can benefit from more informative reports and streamlined PDF imports, ultimately facilitating better tracking and management of production orders.



| RYG | Card ID | Cycle No | PO # | PO Line # | Item | Operation Name | Machine | Start Time | Release |
|-----|--------------|----------|-----------|-------------|--------------|-------------------------------|----------|------------------------|---------|
| | KCD351GQALSK | 1 | 89878 | 89,878 | ITPS110523 | OP1 | NewMach3 | 05/11/2023 12:58:03 PM | 05/1 |
| | KCD35TLQALVJ | 1 | | 0 | ITPS110523 | OP1 (Completed) OP2 (Next) | | 05/11/2023 01:00:09 PM | 05/1 |
| | KCD35TMQAL2P | 1 | 443332211 | 443,332,211 | ITPS110523_1 | OP1 (Next) | | - | 05/1 |
| | KCD35TWQALZG | 1 | 444444444 | 44,444,444 | ITPS110523_1 | OP1 (Completed) OP2 (Next) | | 05/11/2023 05:36:31 PM | 05/1 |
| | KCD35VQAL6D | 1 | 444444444 | 44,444,444 | ITPS110523_1 | OP1 | NewMach3 | 05/11/2023 05:36:31 PM | 05/1 |
| | KCD35UQALV7 | 1 | 444444444 | 44,444,444 | ITPS110523_1 | OP1 | NewMach3 | 05/11/2023 05:26:49 PM | 05/1 |
| | KCD35TTQAL22 | 1 | 444444444 | 44,444,444 | ITPS110523_1 | OP1 | NewMach3 | 05/11/2023 05:26:00 PM | 05/1 |
| | KCD35SQAL7T | 1 | | 0 | ITPS110523_1 | OP1 (Next) | | - | 05/1 |
| | KCD35TQAL3L | 1 | 5354333 | 5,354,333 | ITPS110523_1 | OP1 | NewMach3 | 05/11/2023 05:49:43 PM | 05/1 |

In the PDF Import feature of LFM, significant improvements have been implemented to enhance the import process for jobs (cards) in various statuses. Previously, the PDF import was restricted to specific job statuses, excluding the "Ship" status. However, with the recent enhancements, the PDF is now imported to jobs in any status except for "Ship."

This expanded functionality allows for a more comprehensive and flexible PDF import process. Regardless of whether the job is not yet started, currently running, or partially completed, the PDF can be imported and associated with the respective job. This ensures that all relevant job statuses are covered, providing a more holistic view of the production process and documentation.

By extending the PDF import capability to a wider range of job statuses, LFM facilitates smoother information flow and record-keeping. Users can easily import PDFs at different stages of the job lifecycle, ensuring that critical documentation is readily available and properly associated with the corresponding jobs.

These enhancements optimize the PDF import process in LFM, improving efficiency, accuracy, and documentation management for users throughout the production cycle.



| | | Job Number | Plant | Workcenter | Status | OP1 (Next) |
|--------------------------|--------------|------------|---------|------------|------------|------------|
| <input type="checkbox"/> | KCD35U9QALMG | 1 | 0 | ITP5120523 | OP1 (Next) | - |
| <input type="checkbox"/> | KCD35VBQALT5 | 1 | 130,523 | ITP5130523 | OP1 (Next) | - |
| <input type="checkbox"/> | KCD35V9QAL7Y | 1 | 130,523 | ITP5130523 | OP1 (Next) | - |
| <input type="checkbox"/> | KCD35V8QALYV | 1 | 130,523 | ITP5130523 | OP1 (Next) | - |
| <input type="checkbox"/> | KCD35V6QAL9A | 1 | 130,523 | ITP5130523 | OP1 (Next) | - |
| <input type="checkbox"/> | KCD35V7QALWF | 1 | 130,523 | ITP5130523 | OP1 (Next) | - |
| <input type="checkbox"/> | KCD35V4QAL55 | 1 | 130,523 | ITP5130523 | OP1 (Next) | - |
| <input type="checkbox"/> | KCD35V3QAL8U | 1 | 130,523 | ITP5130523 | OP1 (Next) | - |
| <input type="checkbox"/> | KCD35V2QALXZ | 1 | 130,523 | ITP5130523 | OP1 (Next) | - |

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A valuable enhancement has been introduced in LFM with the addition of a new Job file parameter called "look.in.wc." This parameter offers enhanced flexibility and control over job searches within associated Workcenters for a specific Business Unit.

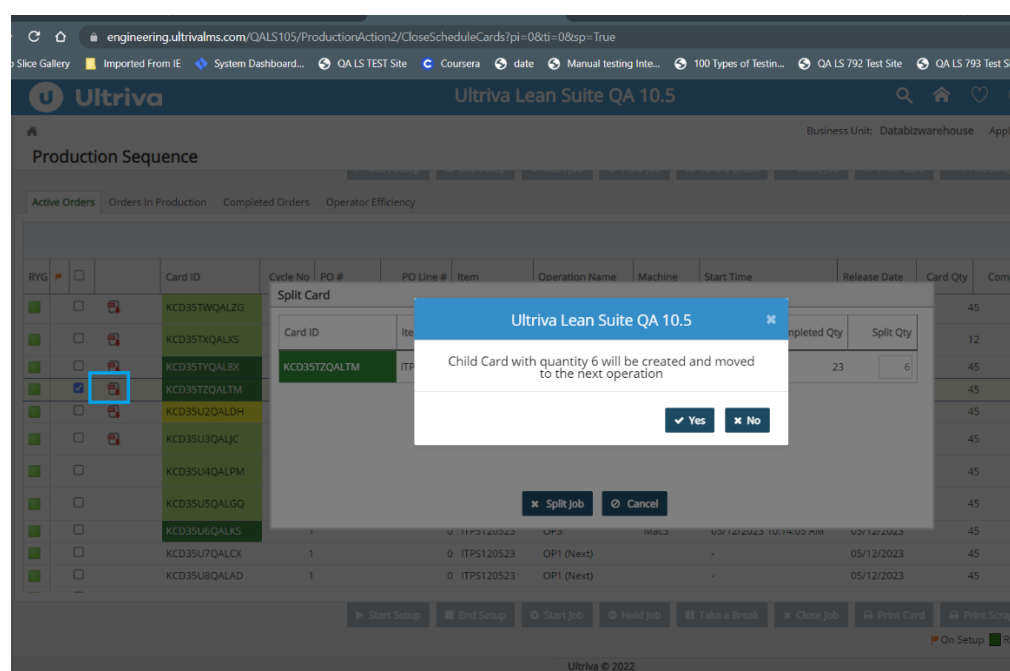
By default, the "look.in.wc" parameter is set to "N" (false). However, when this parameter is changed to "Y" (true), the LFM application will extend its search to include jobs (cards) located in the associated Workcenter for the corresponding Business Unit. This means that if a job is configured to be associated with a specific Workcenter within a plant, the system will consider and retrieve these jobs during searches.

This enhancement allows for more comprehensive job tracking and management, especially when dealing with complex production environments where jobs may be distributed across different Workcenters within a plant. By enabling the search for jobs in associated Workcenters, users can easily identify and manage jobs that exist in inner Workcenters, gaining a complete view of production activities and optimizing resource allocation.

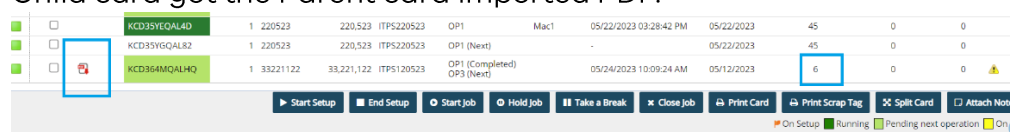
Overall, this enhancement provides greater flexibility and granularity in job searches, enabling improved visibility and control over production processes within LFM.

Copy Imported PDF to Child Card (Split Cards) in LFM

In the Production Sequence, when performing the Split Cards action, an enhancement has been made to copy the attached PDF from the parent job (Card) to the child job (Card) created as a result of the split process. This ensures that the child card receives a copy of the PDF attachment from the parent card, maintaining the associated documentation throughout the production workflow.



Child card got the Parent card imported PDF.



Receive cards list:

Receive Cards List

Ind Card ID: Views:

Storage Location:

Sorted by: Item, Regd Receive, Card ID 1 to 2 of 2

| Card ID | Item | Accessory Order No | Regd Receive | Ship Date | Card Qty | Ship Qty | Release Id | Receive Qty | Storage Location | PO # | Is Consignment |
|-------------|----------|--------------------|--------------|-----------|----------|----------|-------------------|-------------|------------------|--------|----------------|
| KCD359MD4UQ | IT200423 | | 28/Apr/23 | 22/May/23 | 15 | 15 | KCD359MD4UQ-001-2 | 15 | Loc200423 | 200423 | Yes |
| KCD359QAL2X | IT200423 | | 28/Apr/23 | 22/May/23 | 15 | 15 | KCD359QAL2X-001-6 | 15 | Loc200423 | 200423 | Yes |

Sort by RYG Code on Machine Capacity Screen

In the Machine Capacity Management screen, an improvement has been made to the sorting of the RYG (Red, Yellow, Green) column indicator. The indicator will now be sorted in descending order based on machine capacity. This means that machines with higher capacity will be displayed first, followed by those with lower capacity. This enhancement enables users to quickly identify and prioritize machines with the highest capacity, facilitating efficient capacity management and allocation.

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Actions > Orders In Production > Machine Capacity Management

Machine Capacity Management

Select Operation: Machine: Select Schedule Date: Filter By: Sel

Available Run Time: 6 Hour(s) and 22 Minute(s)

Active Orders **Machine Capacity Management** Machine Reassignment View Orders By Item Completed Orders

| | Machine | Machine Description | Operation Name | Total Orders | Ideal Run Rate |
|--------------------------|-------------|---------------------|----------------|--------------|--------------------------|
| <input type="checkbox"/> | Machine1 | Machine1 | Operation1 | 20 | 2.00000 Hours |
| <input type="checkbox"/> | MachColour2 | MachColour2 | Op210522_1 | 280 | 4.00000 PiecesPerHour |
| <input type="checkbox"/> | MachColour1 | MachColour1 | Op210522 | 117 | 4.00000 PiecesPerHour |
| <input type="checkbox"/> | NewMach2 | NewMach2 | opmult2 | 9 | 2.00000 Hours |
| <input type="checkbox"/> | Mac1 | Mac1 | OP1 | 113 | 10.00000 PiecesPerMinute |
| <input type="checkbox"/> | Mac1 | Mac1 | opmult1 | 76 | 10.00000 PiecesPerMinute |
| <input type="checkbox"/> | Mac260822_1 | Mac260822_1 | OP260822_1 | 2 | 5.00000 Minutes |
| <input type="checkbox"/> | Mac260822_1 | Mac260822_1 | OP260822 | 1 | 5.00000 Minutes |
| <input type="checkbox"/> | Mac260822 | Mac260822 | OP260822_1 | 8 | 45.00000 PiecesPerHour |
| <input type="checkbox"/> | Mac260822 | Mac260822 | OP260822 | 2 | 45.00000 PiecesPerHour |
| <input type="checkbox"/> | Mac2 | Mac2 | OP2 | 176 | 20.00000 PiecesPerMinute |
| <input type="checkbox"/> | Mac3 | Mac3 | OP3 | 80 | 30.00000 PiecesPerMinute |

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LFM Performance Improvements

There are significant performance enhancements for all LFM screens. Our team conducted a detailed analysis and profiling of each individual screen, identifying areas for improvement to optimize loading times and overall performance.

Key Highlights:

- **Faster Loading:** Through careful optimization, we have significantly reduced the loading times for all LFM screens. Users can now experience a smoother and more efficient workflow, with screens loading quickly and responsively.
- **Streamlined Calculations:** Unnecessary calculations during screen loading have been eliminated, resulting in a more streamlined and efficient process. This optimization has reduced the processing overhead and improved the overall responsiveness of the application.

These performance improvements aim to provide a seamless user experience, enabling users to accomplish tasks more swiftly and effectively in the LFM application. We remain committed to continuously enhancing the performance and usability of our software to meet and exceed user expectations.

Print Scrap Tag Improvement

In the Print Scrap Tag cards list, we have implemented a user-friendly enhancement. Now, when users access the list, all cards will be displayed in an expanded view by default. This means that users will be able to see all the associated scrap tags without the need to click on the expand arrow located at the right of each card.

By presenting the scrap tags directly on the expanded view, we aim to improve efficiency and reduce the need for additional clicks, enabling users to quickly access the information they need.

This enhancement simplifies the workflow and enhances the user experience in navigating the Print Scrap Tag cards list. We are committed to continuously improving our application to meet user needs and deliver a seamless experience.

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Assign Operation to Route Improvement

In the Assign Operation to Route page, we have implemented an enhancement based on user preferences. Starting now, the number of records displayed on the page will always align with the value configured in the User Preference settings. Previously, the default display was set to 25 records.

By accommodating the user's preferred number of records, we aim to improve usability and provide a customized experience tailored to individual needs. This change eliminates the need for users to manually adjust the number of records displayed, saving time and effort.

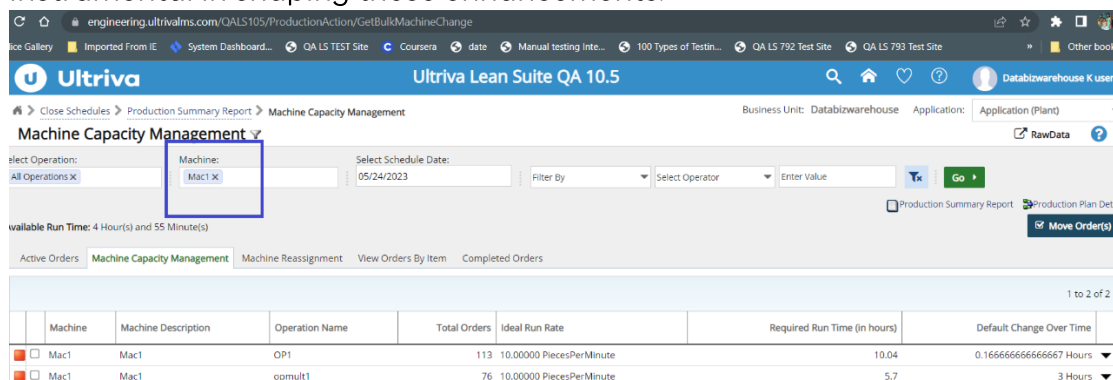
We value user feedback and strive to make continuous improvements to enhance the overall user experience.

Production Summary Report Filter Improvement

In the Production Summary Report, also known as the Capacity Utilization Report, we have introduced a convenient enhancement related to the machine filter. When a user applies a machine filter on the Production Summary Report screen and clicks on the "Manage" link (Grid), they will be automatically redirected to the Machine Capacity Management screen for that specific day.

Furthermore, the machine filter selected in the Production Summary Report will be preserved in the Machine Capacity Management screen. This means that users can seamlessly transition to managing machine capacities while maintaining the same machine filter they had applied in the report. This improvement eliminates the need for users to reapply the filter, saving time and effort.

We continuously strive to improve usability and provide a seamless experience across different screens in our application. Your feedback and suggestions are instrumental in shaping these enhancements.



Machine Capacity Management

Select Operation: All Operations X | Machine: Mac1 X | Select Schedule Date: 05/24/2023 | Filter By | Select Operator | Enter Value | Go

Available Run Time: 4 Hour(s) and 55 Minute(s)

Production Summary Report | Move Order(s)

Active Orders | **Machine Capacity Management** | Machine Reassignment | View Orders By Item | Completed Orders

| Machine | Machine Description | Operation Name | Total Orders | Ideal Run Rate | Required Run Time (in hours) | Default Change Over Time |
|---------|---------------------|----------------|--------------|--------------------------|------------------------------|--------------------------|
| Mac1 | Mac1 | OP1 | 113 | 10.00000 PiecesPerMinute | 10.04 | 0.166666666666667 Hours |
| Mac1 | Mac1 | opmult1 | 76 | 10.00000 PiecesPerMinute | 5.7 | 3 Hours |

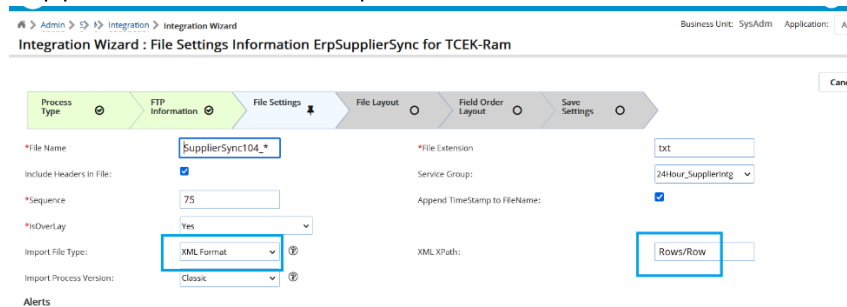
Add support for XML in APIs

seamless integration with external systems or partners.

To leverage the XML format specifically, follow these steps:

1. Edit the DataIN or DataOut job.
2. Set the Import File Type as "XML Format".
3. Specify the XML XPath as "Rows/Row" or as per your specific XML structure.
4. Save the changes to the job configuration.

This enhancement enables flexible data exchange and facilitates integration with systems that rely on JSON or XML formats. We continue to enhance our platform to support diverse data requirements and offer seamless interoperability.



We are excited to introduce a new tool called "Convert File Data to JSON" in our system. This tool provides the ability to convert any flat file associated with a job to JSON or XML format.

Key Features of the "Convert File Data to JSON" Tool:

- **Flexibility:** The tool supports the conversion of various flat file formats to JSON or XML, enabling compatibility with a wide range of data sources.
- **Seamless Integration:** By converting flat file data to JSON or XML, the tool facilitates seamless integration with other systems or platforms that rely on these formats.
- **Customization Options:** Users can configure the tool to define the desired structure and formatting options for the generated JSON or XML output.

To utilize this tool:

1. Access the "Convert File Data to JSON" tool in our system.
2. Specify the flat file associated with the job that you want to convert.
3. Choose the desired output format (JSON or XML).
4. Configure any additional options or settings for the conversion process.
5. Initiate the conversion process and obtain the converted JSON or XML file.

This tool empowers users to efficiently transform flat file data into JSON or XML formats, enhancing interoperability and data exchange capabilities within your organization. We are dedicated to providing versatile tools that simplify data processing and improve system integration.

Admin > Tools > Bulk Tools > Convert File Data to Json > Home

Convert File Data to Json (API): Show Json Output

Preview Source Data

Show Json Output

```
<Batch>=<BatchType>JOBERSUPPLIERDATA</BatchType><ContentType>XML</ContentType><Version>1.0</Version><Rows
Count>3</Row rowno=1"><ADDRESS1>Vizag1</ADDRESS1><ADDRESS2>vizag2</ADDRESS2><ADDRESS3>vizag3</ADDRESS3>
<CITY>Vizag</CITY><COUNTRY>India</COUNTRY><PLANTCODE>TCEK-Ram</PLANTCODE><STATE>AP</STATE>
<SUPPLIERCODE>Sup191222</SUPPLIERCODE><SUPPLIERNAME>Sup191222</SUPPLIERNAME><ZIP>530017</ZIP></Row><Row
rowno=2"><ADDRESS1>Vizag1</ADDRESS1><ADDRESS2>Vizag2</ADDRESS2><ADDRESS3>vizag3</ADDRESS3><CITY>Vizag</CITY>
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<SUPPLIERCODE>Sup191222_1</SUPPLIERCODE><SUPPLIERNAME>Sup191222_1</SUPPLIERNAME><ZIP>530017</ZIP></Row><Row
rowno=3"><ADDRESS1>Vizag1</ADDRESS1><ADDRESS2>Vizag2</ADDRESS2><ADDRESS3>vizag3</ADDRESS3><CITY>Vizag</CITY>
<COUNTRY>India</COUNTRY><PLANTCODE>TCEK-Ram</PLANTCODE><STATE>AP</STATE>
<SUPPLIERCODE>Sup191222_2</SUPPLIERCODE><SUPPLIERNAME>Sup191222_2</SUPPLIERNAME><ZIP>530017</ZIP></Row>
</Rows></Batch>
```

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Check data in batch job status report.

Admin > Tools > Bulk Tools > Integration

Batch Job Supplier Sync Summary Report

Job Name: JOBERSUPPLIERDATA Date Range: 05/21/2023-05/25/2023

Sorted by: Uploaded On

| Batch ID | File Name | Uploaded On | Uploaded By | Status | Pending | Completed | Duplicates | Failed | Expired | Data Error | Data Warning |
|----------------------|-----------|------------------------|-------------|--------|---------|-----------|------------|--------|---------|------------|--------------|
| BAT6776-230524-QALAX | | 05/25/2023 09:14:45 AM | buyenuser | DONE | 0 | 3 | 0 | 0 | 0 | 0 | 0 |
| BAT4317-230523-QAL3P | | 05/23/2023 04:04:08 PM | buyenuser | DONE | 0 | 3 | 0 | 0 | 0 | 0 | 0 |
| Total | | | | | 0 | 6 | 0 | 0 | 0 | 0 | 0 |

Ultriva Lean Suite QA 10.5

Admin > Tools > Bulk Tools > Integration

Batch Job Supplier Sync Detail Report for Batch: BAT6776-230524-QALAX

Business Unit: TCEK-Ram Application: Application (plants)

Filter By: Select Operator: Enter Value: Go

Find Code: [icon] [icon]

Sorted by: Line #

| Plant Code | Line # | Supplier Code | Supplier Name | Address1 | Address2 | City | State | Zip | Country | StatusMsg |
|------------|--------|---------------|---------------|----------|----------|-------|-------|--------|---------|-------------------------------|
| TCEK-Ram | 2 | Sup191222 | Sup191222 | Vizag1 | vizag2 | Vizag | AP | 530017 | India | Supplier Successfully Updated |
| TCEK-Ram | 3 | Sup191222_1 | Sup191222_1 | vizag1 | Vizag2 | Vizag | AP | 530017 | India | Supplier Successfully Updated |

Convert Flat File to JSON/XML format

We are excited to introduce a new tool in the Admin section of our application. The tool, located under the path Admin > Tools > Bulk Tools, enables the conversion of flat files associated with configured jobs to JSON or XML formats based on the job's configuration.

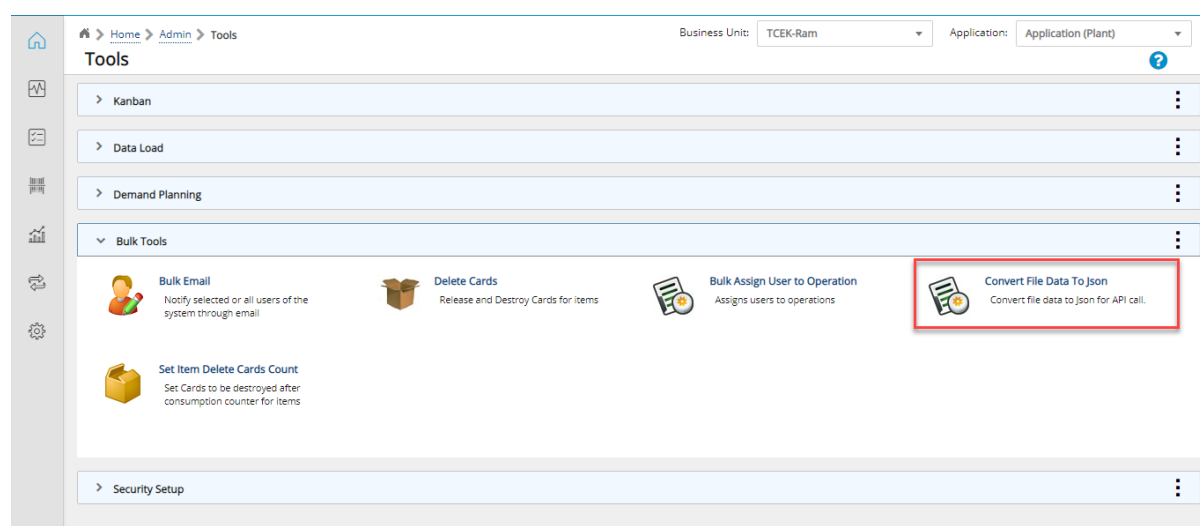
Key Features of the Bulk File Conversion Tool:

- **File Conversion:** The tool allows users to convert flat files to either JSON or XML format, depending on the configuration of the associated job.
- **Configurable Jobs:** Users can configure specific jobs within the application, specifying the desired output format (JSON or XML) for the file conversion process.
- **Streamlined Workflow:** The tool streamlines the conversion process, eliminating the need for manual conversion or third-party tools.

To utilize the Bulk File Conversion Tool:

1. Navigate to the Admin section of the application.
2. Access the Tools menu and select Bulk Tools.
3. Locate and select the Bulk File Conversion Tool.
4. Identify the job associated with the flat file you wish to convert.
5. Configure the job to specify the desired output format (JSON or XML) for the conversion.
6. Initiate the conversion process, and the tool will generate the converted file in the specified format.

This new tool offers a convenient and centralized approach to convert flat files to JSON or XML formats, aligning with the job configurations within the application. It simplifies the conversion process, providing users with greater flexibility and enhancing data interchange capabilities.



We have made an update to the Bulk File Conversion Tool to ensure it aligns with the Import File Type configuration of the selected batch job. By default, the tool exports files as JSON. However, when the selected batch job has the Import File Type set to XML, the tool will now generate an XML file with the converted data.

This enhancement allows for seamless integration with batch jobs that require XML data, ensuring compatibility and consistency with the specified Import File Type. Whether the job expects JSON or XML input, the Bulk File Conversion Tool will generate the corresponding format, simplifying the file conversion process.

Users can rely on the tool to produce the appropriate file format based on the configuration of the selected batch job, streamlining data interchange and facilitating integration with downstream processes or systems.

We strive to enhance our tools to meet user requirements and provide a smooth experience when working with various file formats in our application.

Admin > I> Convert File Data to Json > Home

Convert File Data to Json (API): Show Json Output

Preview Source Data

Show Json Output

```

<Batch><BatchType>JOBERPSUPPLIERDATA</BatchType><ContentType>XML</ContentType><Version>1.0</Version><Rows
Count>3</Row rowno="1"><ADDRESS1>Vizag1</ADDRESS1><ADDRESS2>vizag2</ADDRESS2><ADDRESS3>vizag3</ADDRESS3>
<CITY>Vizag</CITY><COUNTRY>India</COUNTRY><PLANTCODE>TCEK-Ram</PLANTCODE><STATE>AP</STATE>
<SUPPLIERCODE>Sup191222</SUPPLIERCODE><SUPPLIERNAME>Sup191222</SUPPLIERNAME><ZIP>530017</Row><Row
rowno="2"><ADDRESS1>VIZAG1</ADDRESS1><ADDRESS2>Vizag2</ADDRESS2><ADDRESS3>vizag3</ADDRESS3><CITY>Vizag</CITY>
<COUNTRY>India</COUNTRY><PLANTCODE>TCEK-Ram</PLANTCODE><STATE>AP</STATE>
<SUPPLIERCODE>Sup191222_1</SUPPLIERCODE><SUPPLIERNAME>Sup191222_1</SUPPLIERNAME><ZIP>530017</Row><Row
rowno="3"><ADDRESS1>VIZAG1</ADDRESS1><ADDRESS2>Vizag2</ADDRESS2><ADDRESS3>vizag3</ADDRESS3><CITY>Vizag</CITY>
<COUNTRY>India</COUNTRY><PLANTCODE>TCEK-Ram</PLANTCODE><STATE>AP</STATE>
<SUPPLIERCODE>Sup191222_2</SUPPLIERCODE><SUPPLIERNAME>Sup191222_2</SUPPLIERNAME><ZIP>530017</Row>
</Rows></Batch>

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Expanded support for Single Sign-On (SSO) using the SAML 2.0 protocol

With this update, administrators can now easily configure SSO providers for plants or Work centers, enabling users to log in to the application using their SSO credentials.

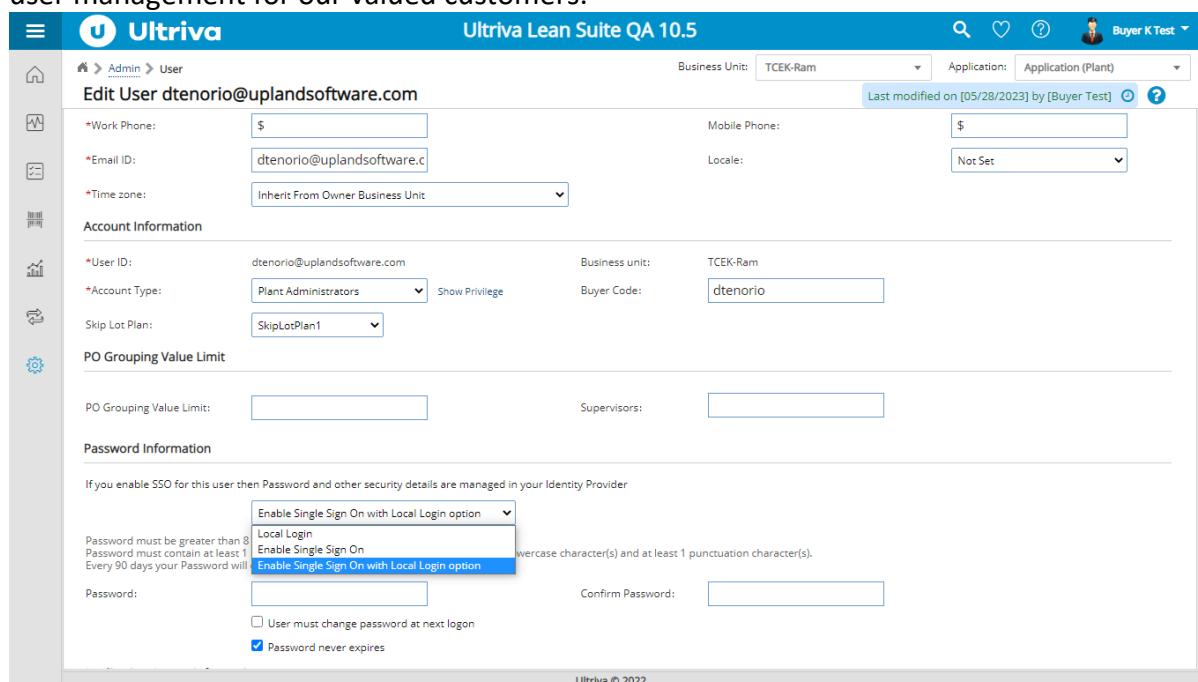
User SSO Setup:

To configure SSO login for a user, administrators need to set up the corresponding SSO provider for the plant or Work center. Once the SSO configuration is established, the user setup screen will reflect the following information in the Password Information section:

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

By enabling SSO for a user, the application seamlessly integrates with the designated Identity Provider, ensuring that password and security management is handled within the SSO environment. This simplifies user access management and improves security through centralized identity management.

We are dedicated to providing robust authentication options and streamlining user experiences. The expanded support for SSO using SAML 2.0 enhances security and simplifies user management for our valued customers.



The screenshot displays the 'Edit User' interface in the Ultriva Lean Suite QA 10.5 application. The user being edited is 'dtenorio@uplandsoftware.com'. The 'Password Information' section is active, showing a dropdown menu with the following options: 'Enable Single Sign On with Local Login option' (selected), 'Local Login', 'Enable Single Sign On', and 'Enable Single Sign On with Local Login option'. Below the dropdown, there are input fields for 'Password' and 'Confirm Password'. There are also checkboxes for 'User must change password at next login' and 'Password never expires'.

To enable users to log in via an SSO provider, please select one of the following options:

1. Enable Single Sign-On (SSO): By selecting this option, users will be able to log in exclusively using their SSO credentials. Local login using a username and password will be disabled for these users.

2. Enable Single Sign-On with Local Login Option: Choosing this option allows users to log in using either their SSO credentials or a local username and password. Users will have the flexibility to choose between SSO login or traditional local login.

These options provide flexibility in user authentication methods, allowing administrators to configure the desired login experience based on their requirements and user preferences.

Bypass Login Screen

When the client has a single SSO identity provider for the entire company, there is a URL available that allows users to bypass the regular login screen and directly initiate the SSO identity provider authentication process.

If the user has the SAML protocol enabled (SSO_CONFIG_MODE = S), the route to access the SSO authentication process will be:

...

/UltrivaSAMLSSO/Login

...

For example:

...

<https://engineering.ultrivalms.com/QALS105//UltrivaSAMLSSO/Login>

...

If the user has the WS-Fed protocol enabled (SSO_CONFIG_MODE = W), the route to access the SSO authentication process will be:

...

/UltrivaSSO/Login

...

For example:

...

<https://engineering.ultrivalms.com/QALS105//UltrivaSSO/Login>

...

By directly accessing this URL, the regular login page will not be displayed. Instead, the user will be automatically redirected to the company's SSO identity provider authentication process.

This streamlined authentication flow improves user experience and facilitates seamless integration with the company's SSO infrastructure.

Main SSO Configuration

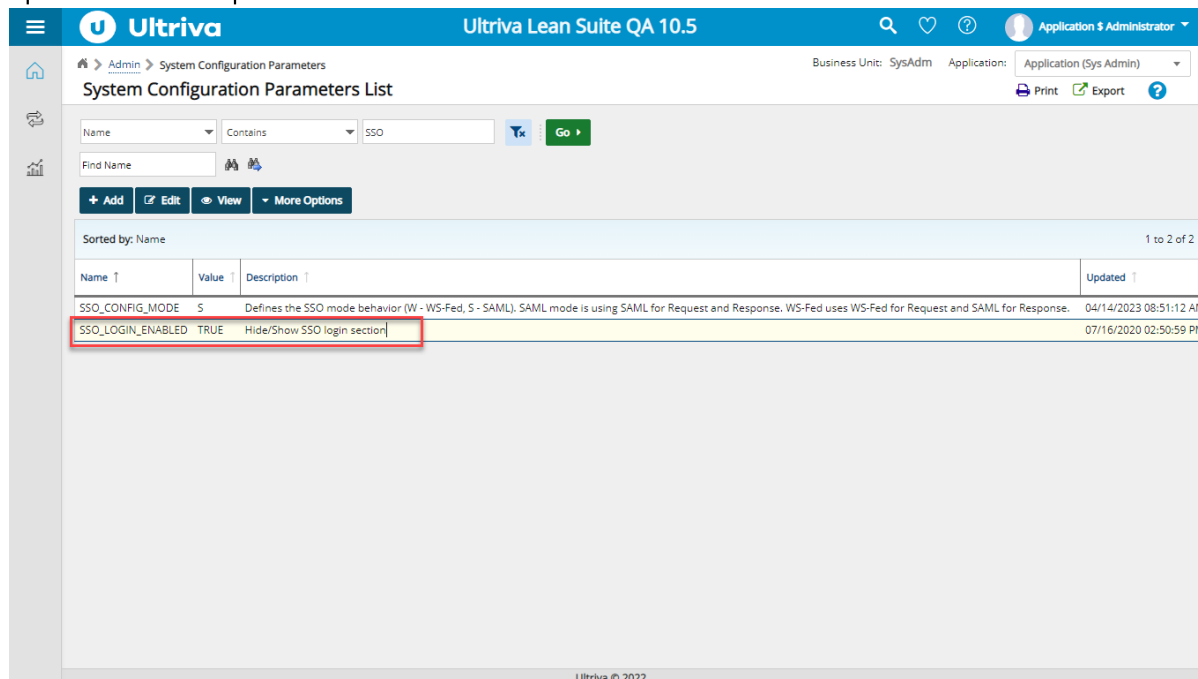
Within the System Configuration Parameters, you will find the SSO_LOGIN_ENABLED setting, which provides the option to hide or show a checkbox on the login screen. This checkbox allows users to choose whether to use SSO for logging in. By default, the value of this setting is set to TRUE, meaning the checkbox will be visible on the login screen.

Key Setting: SSO_LOGIN_ENABLED

- Default Value: TRUE
- Functionality: Determines the visibility of the SSO checkbox on the login screen.
- TRUE: The checkbox allowing users to use SSO for login will be displayed on the login screen.
- FALSE: The checkbox will be hidden, preventing users from selecting the SSO option for login.

Administrators can modify this setting based on their organization's requirements. If SSO is the preferred method of authentication and no other login options are needed, setting SSO_LOGIN_ENABLED to FALSE will remove the checkbox, streamlining the login process.

We aim to provide flexibility and customization options to meet diverse user needs, and this setting allows organizations to tailor the login experience according to their specific SSO implementation.



The screenshot displays the 'System Configuration Parameters List' interface in the Ultriva Lean Suite QA 10.5. The interface includes a search bar, filters, and a table of parameters. The 'SSO_LOGIN_ENABLED' parameter is highlighted with a red box.

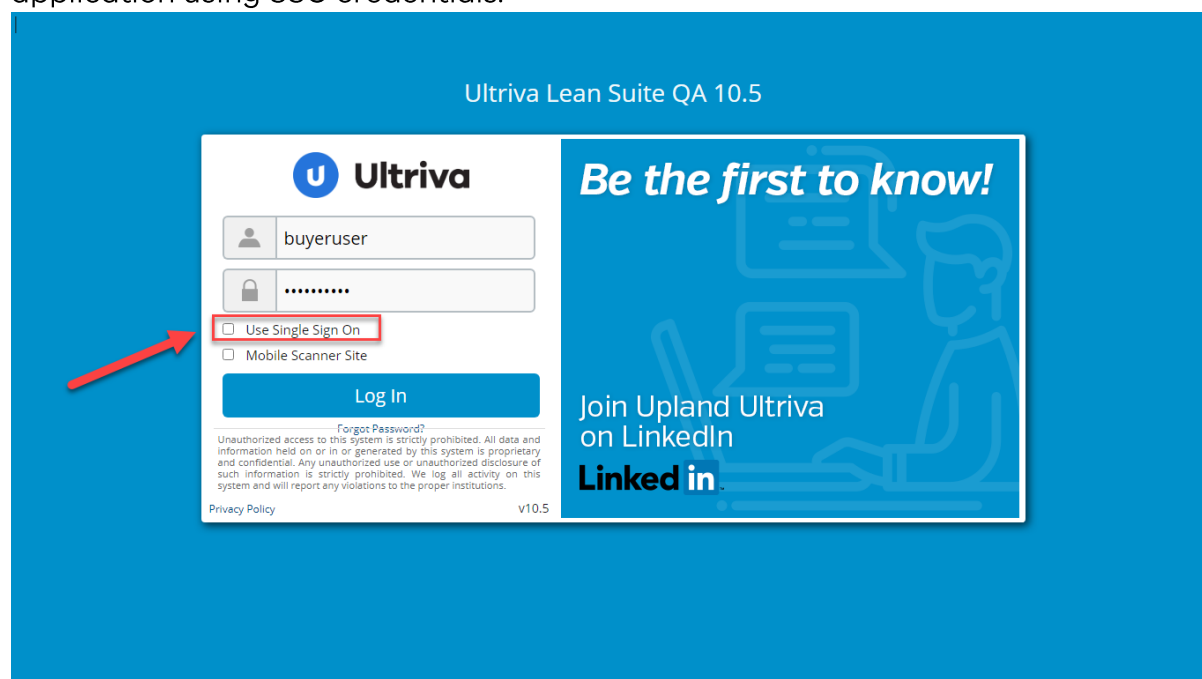
| Name | Value | Description | Updated |
|-------------------|-------|---|------------------------|
| SSO_CONFIG_MODE | S | Defines the SSO mode behavior (W - WS-Fed, S - SAML). SAML mode is using SAML for Request and Response. WS-Fed uses WS-Fed for Request and SAML for Response. | 04/14/2023 08:51:12 AM |
| SSO_LOGIN_ENABLED | TRUE | Hide/Show SSO login section | 07/16/2020 02:50:59 PM |

We have implemented a Single Sign-On (SSO) checkbox on the login screen to provide a convenient option for users to utilize SSO authentication. When the user clicks on the checkbox, the password field will be automatically disabled, indicating that SSO authentication is being enabled.

To proceed with SSO login, the user should enter the Ultriva username associated with their SSO-enabled account in the designated user field. This Ultriva username is configured in the User Configuration settings.

By selecting the SSO checkbox and entering the appropriate Ultriva username, users can seamlessly initiate the SSO authentication process and access the application without entering a password.

This enhancement simplifies the login experience for users who have SSO enabled, streamlining the authentication process and ensuring a seamless transition to the application using SSO credentials.



SAML Protocol

Initial Configuration

The System Configuration Parameters include the SSO_CONFIG_MODE setting, which allows administrators to define the SSO protocol used in the system. By default, this setting is set to "W" (WS-Federation Protocol). To change the SSO protocol to "S" (SAML), follow the steps below:

1. Press the "Edit" button next to the SSO_CONFIG_MODE setting.
2. Change the value to "S" to enable the SAML protocol.
3. Save the changes to the configuration.

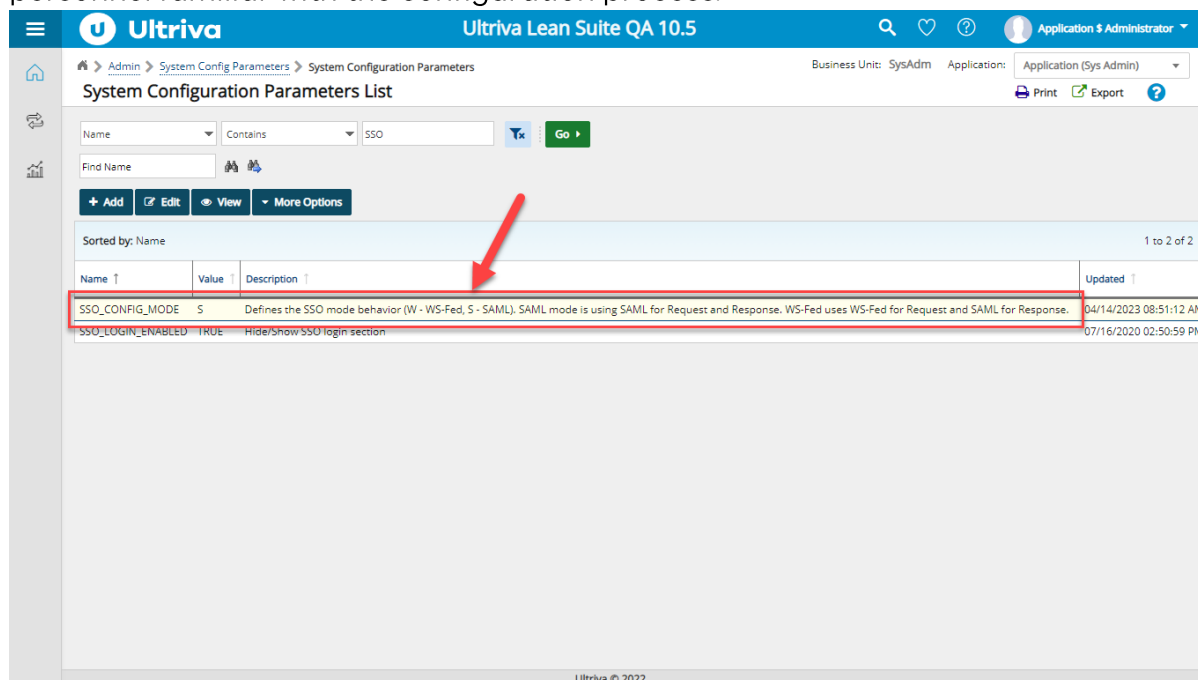
After saving the updated SSO_CONFIG_MODE value, it is necessary to recycle the App Pool in IIS to ensure the refreshed list items take effect. This process refreshes the application pool, ensuring the updated configuration settings, including the SSO protocol, are applied correctly.

Recycling the App Pool typically involves the following steps:

1. Access the Internet Information Services (IIS) Manager.
2. Locate the application pool associated with the Ultriva application.
3. Right-click on the application pool and select "Recycle" to refresh it.

Recycling the App Pool helps ensure a smooth transition to the updated SSO configuration and allows the system to reflect the changed SSO protocol correctly.

Please note that making changes to the system configuration parameters requires appropriate administrative access and should be performed by authorized personnel familiar with the configuration process.



The screenshot displays the 'System Configuration Parameters List' in the Ultriva Lean Suite QA 10.5. The interface includes a search bar with 'Name' and 'Contains' filters, and a 'Go' button. Below the search bar are buttons for '+ Add', 'Edit', 'View', and 'More Options'. The table is sorted by Name and shows two parameters:

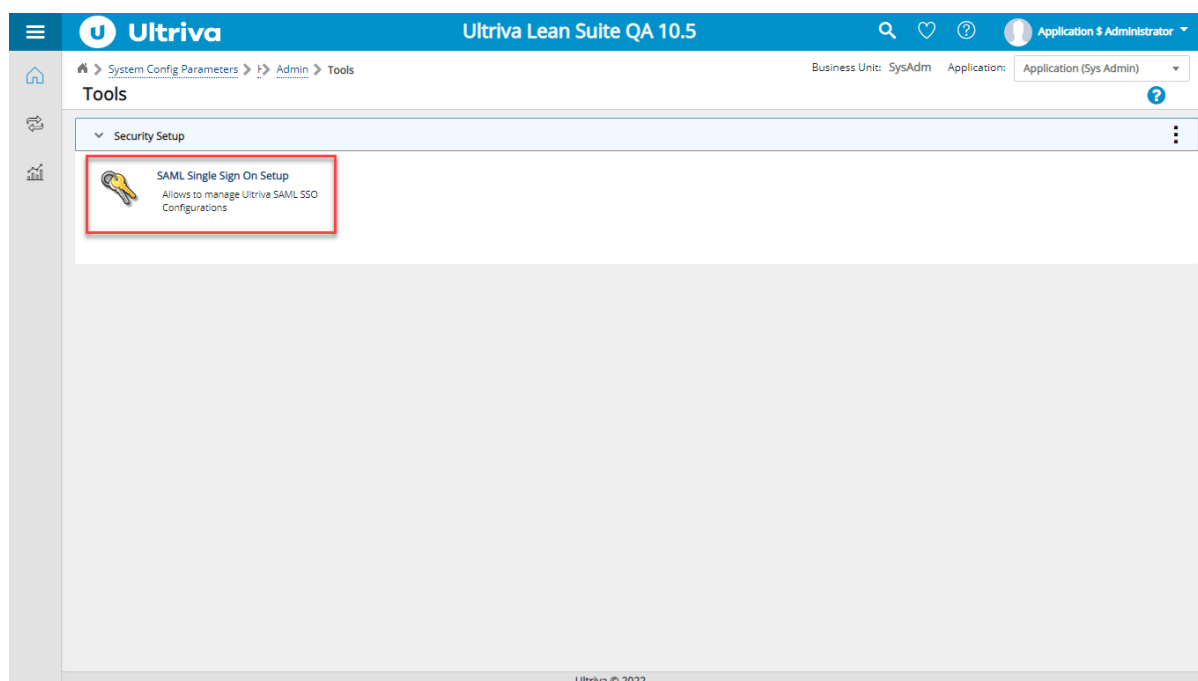
| Name | Value | Description | Updated |
|-------------------|-------|---|------------------------|
| SSO_CONFIG_MODE | S | Defines the SSO mode behavior (W - WS-Fed, S - SAML). SAML mode is using SAML for Request and Response. WS-Fed uses WS-Fed for Request and SAML for Response. | 04/14/2023 08:51:12 AM |
| SSO_LOGIN_ENABLED | TRUE | Hide/show SSO login section | 07/16/2020 02:50:59 PM |

When the SSO_CONFIG_MODE is set to "S" (SAML), the Admin/Tools/Security Setup menu item will display the SAML SSO configuration setting, while the SSO Configuration for WS-Federation will be hidden. This ensures that the appropriate SSO configuration options are presented based on the selected SSO protocol.

By navigating to the Admin/Tools/Security Setup menu item, administrators will have access to the SAML SSO configuration settings, allowing them to configure and manage SAML-specific SSO integration.

The hiding of the WS-Federation SSO configuration options helps streamline the configuration process by presenting only the relevant options based on the chosen SSO protocol.

This approach ensures a clear and intuitive configuration experience, simplifying the setup of SSO for the SAML protocol and avoiding confusion between different SSO protocols within the system.



SSO Configuration

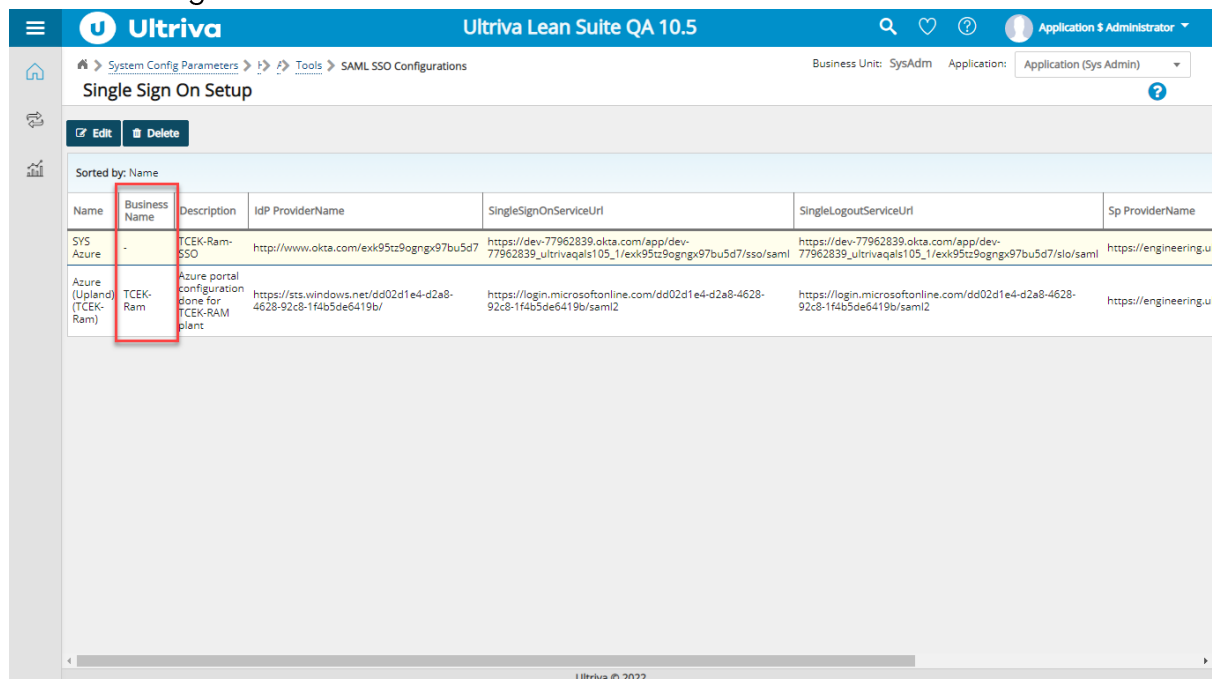
Within the SAML Single Sign-On Setup menu item, users will be presented with a list of available configurations for SAML SSO. Ultriva offers users the flexibility to configure a system-wide SAML SSO configuration that applies to all users in the application. Additionally, users have the option to define specific configurations per business unit.

When a user logs in to LeanSuite using SSO, the system determines the associated Business Unit for that user. If the Business Unit has a configured SSO Configuration, the system will utilize that specific configuration for the login operation. However, if there is no configuration set for the Business Unit, the system will fallback to the system-wide configuration for the login process.

Please note the following important points regarding SSO configurations:

1. One Configuration per Business Unit: The system allows only one SSO configuration per business unit, ensuring a clear association between configurations and specific units.
2. One Configuration for the Whole System: The system also permits one configuration that applies system-wide.
3. System Administrator Access: System Administrators have the ability to view, edit, and delete all SSO configurations, including both system-wide and business unit-specific configurations.
4. Business Name Indication: In the resulting grid that displays all configurations, the Business Name column indicates the business unit associated with each configuration. A dash "-" is used to indicate system-wide configurations.

This configuration setup provides administrators with control over SSO settings at both the system-wide and business unit levels, ensuring flexibility and ease of management. By associating specific configurations with business units, administrators can tailor SSO authentication to meet the needs of individual units within the organization.



| Name | Business Name | Description | IdP ProviderName | SingleSignOnServiceUrl | SingleLogoutServiceUrl | Sp ProviderName |
|---------------------------|---------------|--|---|---|---|------------------------|
| SYS Azure | - | TCEK-Ram-SSO | http://www.okta.com/exk95tz9ogngx97bu5d7 | https://dev-77962839.okta.com/app/dev-77962839_ultrivaqa105_1/exk95tz9ogngx97bu5d7/sso/saml | https://dev-77962839.okta.com/app/dev-77962839_ultrivaqa105_1/exk95tz9ogngx97bu5d7/slo/saml | https://engineering.ul |
| Azure (Upland) (TCEK-Ram) | TCEK-Ram | Azure portal configuration done for TCEK-RAM plant | https://sts.windows.net/dd02d1e4-d2a8-4628-92c8-1f4b5de6419b/ | https://login.microsoftonline.com/dd02d1e4-d2a8-4628-92c8-1f4b5de6419b/saml2 | https://login.microsoftonline.com/dd02d1e4-d2a8-4628-92c8-1f4b5de6419b/saml2 | https://engineering.ul |

In the screenshot, there is one system-wide SSO setting configured for Okta, and one business unit-specific setting for the TCEK-Ram plant. These settings can be customized for plants and/or Workcenters based on your specific requirements.

Creating a New Configuration:

When creating a new SSO configuration, users will have access to a set of fields to configure according to the Identity Provider settings. The fields provided in the Identity Provider Configuration section include all available settings provided by the Identity Provider.

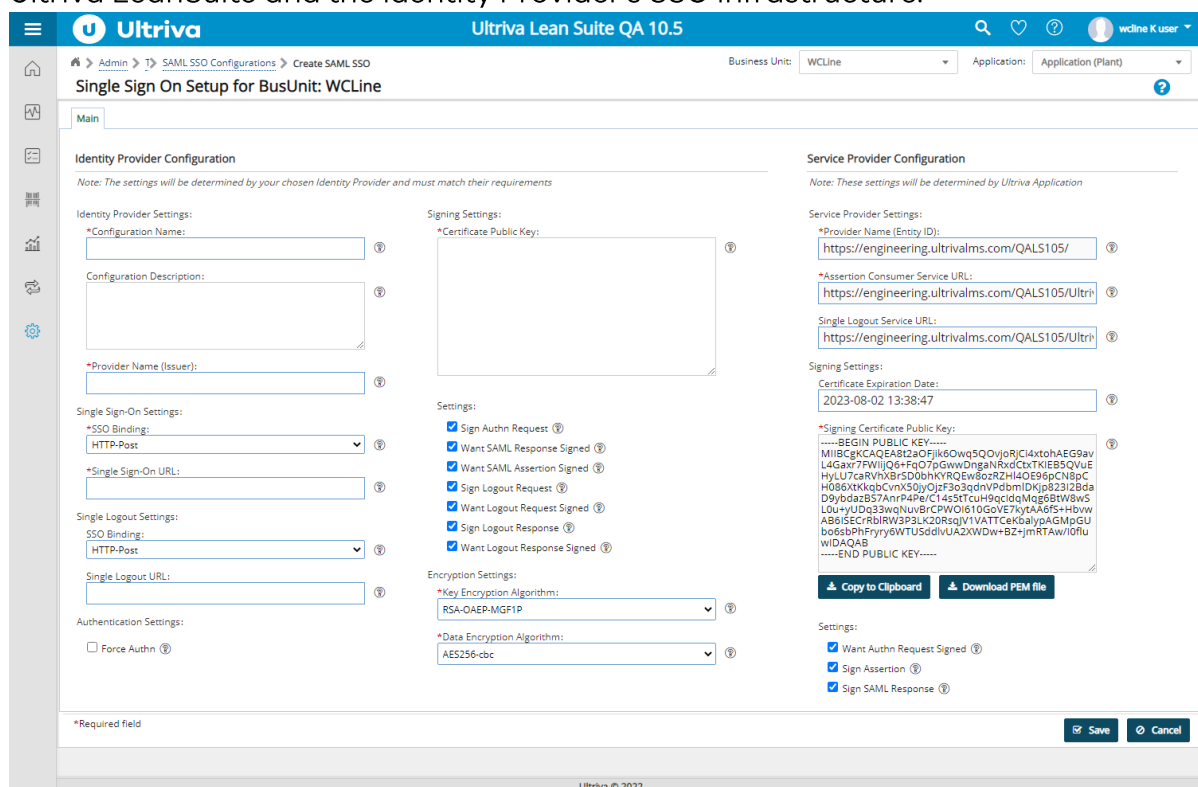
Key Configuration Fields:

1. Configuration Name: A unique name assigned to the SSO configuration within the Ultriva LeanSuite application.
2. Provider Name: A unique name associated with the SSO provider.
3. Signing Certificate: A string that contains the BEGIN PUBLIC KEY and END PUBLIC KEY tags. This field is used for signature validation and verification purposes.

Please ensure that both the Configuration Name and Provider Name are unique across the Ultriva LeanSuite application to avoid conflicts.

By providing these configuration fields, administrators can customize the SSO settings according to the specifications and requirements of their chosen Identity

Provider. This flexibility ensures compatibility and seamless integration between Ultriva LeanSuite and the Identity Provider's SSO infrastructure.



The Service Provider Configuration section includes all the fields that you need to provide to the Identity Provider to finalize the SAML SSO Configuration. These fields contain the necessary information for the integration between Ultriva LeanSuite and the Identity Provider's SSO infrastructure.

One key field within the Service Provider Configuration is the Signing Certificate Public Key. You have two options for providing this key to the Identity Provider:

1. **PEM File:** You can export the Signing Certificate Public Key as a PEM file from Ultriva LeanSuite. This file can then be uploaded or imported into the Identity Provider's settings. The PEM file contains the necessary information to establish the trust relationship between the Identity Provider and Ultriva LeanSuite.
2. **String Format:** Alternatively, you can copy the Signing Certificate Public Key as a string from Ultriva LeanSuite. This string includes the necessary BEGIN PUBLIC KEY and END PUBLIC KEY tags. You can then save or upload this string in the appropriate field within the Identity Provider's SSO configuration settings.

These options provide flexibility in securely sharing the Signing Certificate Public Key with the Identity Provider, ensuring a seamless and secure SAML SSO integration between Ultriva LeanSuite and the Identity Provider's system.

By providing the Service Provider Configuration details, including the Signing Certificate Public Key, you can effectively finalize the SAML SSO Configuration and

establish a trusted connection between Ultriva LeanSuite and the Identity Provider for secure and seamless user authentication.

Editing an existing configuration

When editing an existing SAML SSO configuration, a new tab will be presented to users, allowing them to configure SAML attributes. These attributes play a crucial role in generating the SAML Assertion once the SAML Response is received from the Identity Provider.

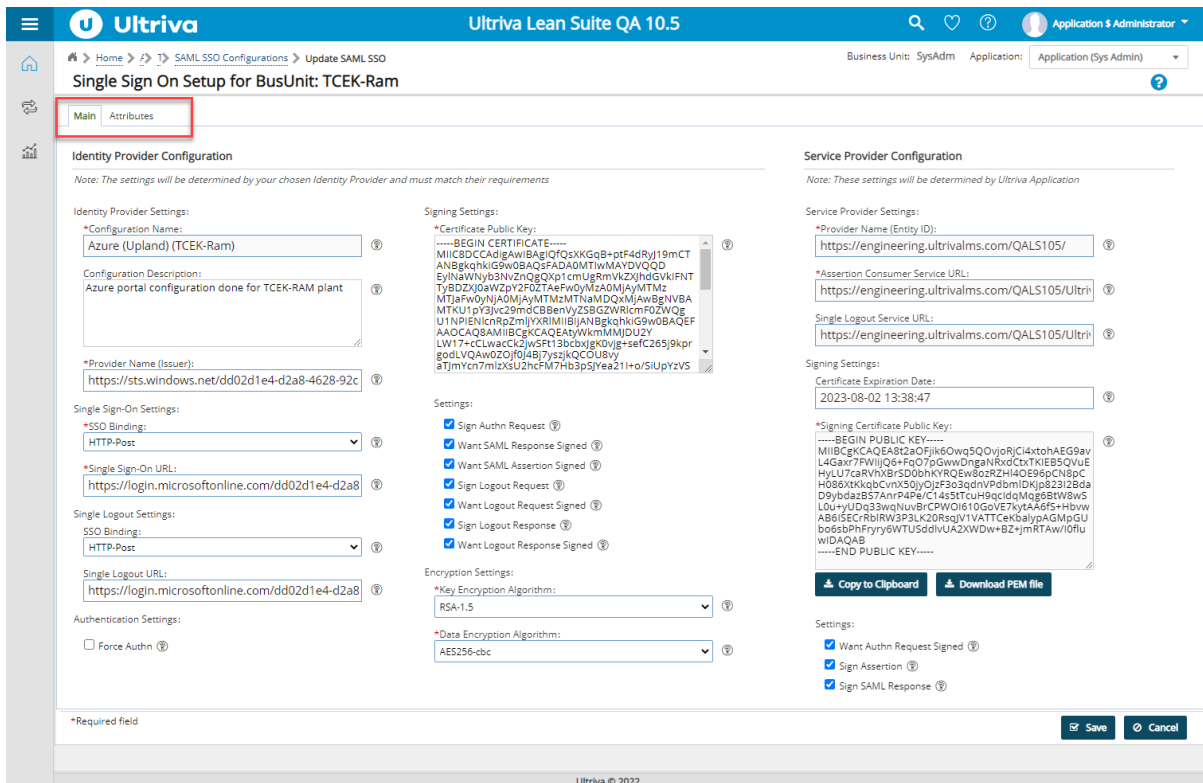
The SAML Attributes tab provides a dedicated space to define and customize the attributes that will be included in the SAML Assertion. These attributes contain specific information about the user and their session, which can be utilized within Ultriva LeanSuite for various purposes.

Within the SAML Attributes tab, users can:

1. **Add Attributes:** Users can define new attributes by specifying the Attribute Name, Attribute Namespace, and Attribute Value.
2. **Modify Attributes:** Existing attributes can be edited to update their values or other attributes associated with them.
3. **Remove Attributes:** If necessary, users can remove attributes that are no longer required.

Configuring these SAML attributes allows for the seamless transfer of relevant user information from the Identity Provider's SSO system to Ultriva LeanSuite. The SAML Assertion, containing the specified attributes, forms the basis of secure authentication and enables personalized experiences within the application.

By providing a dedicated tab for SAML attributes, we enhance the customization and flexibility of the SAML SSO configuration, empowering users to tailor the attributes as per their specific integration requirements.



In the default configuration, Ultriva offers two attributes, namely UserName and Email, which cannot be deleted. These attributes are linked to the Ultriva LoginName field in the EboUser table. When receiving the SAML Response from the Identity Provider, Ultriva searches for the UserName and Email attributes within the response. It then attempts to match these attribute values with the Ultriva LoginName field to identify the corresponding user.

Ultriva provides flexibility for customizing SAML attributes and allows the system to check any unique column in the Ultriva database to identify users. To configure custom SAML attributes or modify the attribute-matching behavior, it is recommended to contact Ultriva Support. The support team will assist you with the specific configuration request, ensuring that the attribute mapping aligns with your requirements and integrates smoothly with your Ultriva deployment.

This level of flexibility and support for custom SAML attribute configuration enhances the compatibility and adaptability of the SAML SSO integration, enabling seamless authentication and personalized user experiences within Ultriva.

Ultriva

Ultriva Lean Suite QA 10.5

Application Administrator

Home > / > 1 > 5 > Update SAML SSO > Attribute list SAML SSO

Business Unit: SysAdm Application: Application (Sys Admin)

SAML Attributes for configuration: Azure (Upland) (TCEK-Ram) and Bus Unit: TCEK-Ram

Main
Attributes

+ Add
Back to SSO Configurations List

1 to 2 of 2

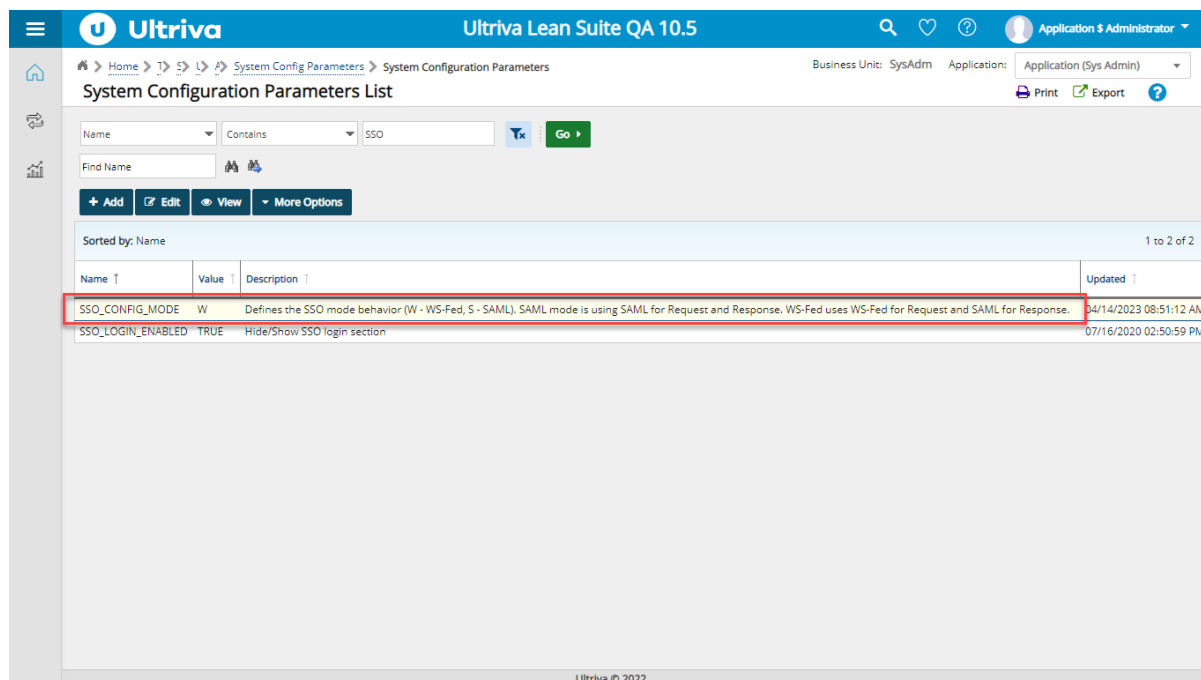
| Attribute Name | Ultriva Attribute Field | Attribute Format | Updated | Updated by |
|----------------|-------------------------|---|------------------------|-------------------------|
| UserName | LoginName | urn:oasis:names:tc:SAML:2.0:attrname-format:basic | 04/20/2023 07:21:57 PM | engineering@ultriva.com |
| Email | LoginName | urn:oasis:names:tc:SAML:2.0:attrname-format:basic | 04/20/2023 07:21:57 PM | engineering@ultriva.com |

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WS-Fed Protocol

Initial Configuration

System Configuration Parameters offers the SSO_CONFIG_MODE setting to define which SSO protocol is going to be used in the system. By default, this setting is set to W (WS-Federation Protocol). For WS-Federation Protocol you should set its value to W. **Once this is saved, please recycle App Pool in IIS to refresh list items.**



Ultriva Lean Suite QA 10.5

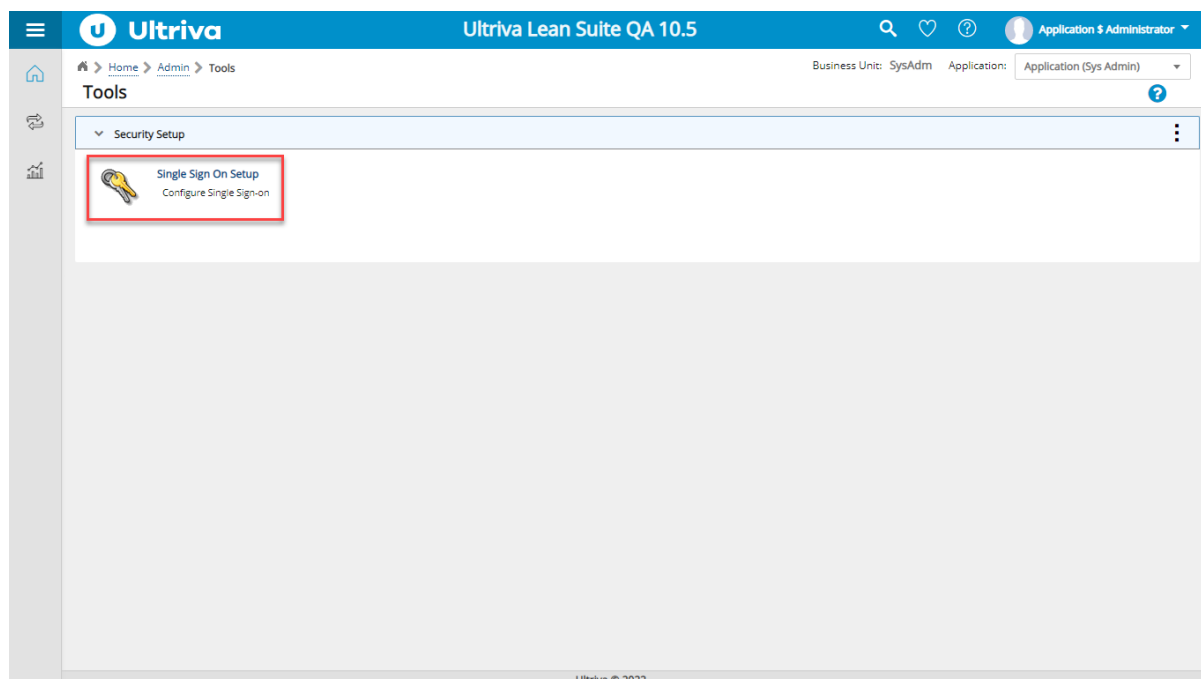
System Configuration Parameters List

Business Unit: SysAdm Application: Application (Sys Admin)

SSO_CONFIG_MODE W Defines the SSO mode behavior (W - WS-Fed, S - SAML). SAML mode is using SAML for Request and Response. WS-Fed uses WS-Fed for Request and SAML for Response. 04/14/2023 08:51:12 AM

SSO_LOGIN_ENABLED TRUE Hide/Show SSO login section 07/16/2020 02:50:59 PM

When SSO_CONFIG_MODE is set to S, in the Admin/Tools/Security Setup menu item, the SAML SSO configuration setting will be displayed and the SSO Configuration (For WS-Federation) will be hidden.



Ultriva Lean Suite QA 10.5

Tools

Security Setup

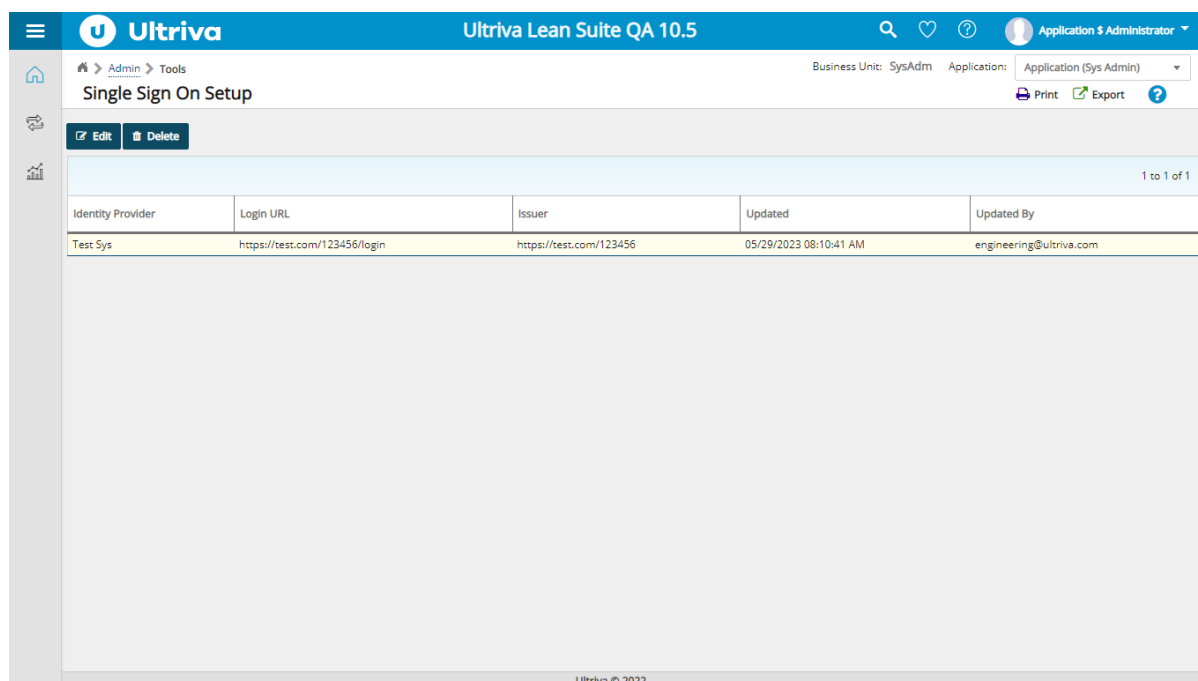
Single Sign On Setup
Configure Single Sign-on

SSO Configuration

Once the user enters to the Single Sign-On Setup menu item, the list of available configurations will be available.

This list will be displaying just one setting (In case it is configured) for the current business unit. Ultriva is offering the users to configure one system wide SSO Configuration that will apply for ALL the users in the application and/or the users can define specific configurations per business unit. Then when a user is logging in into LeanSuite using SSO, our system is going to find out the Business Unit where that user was created. If that business unit has a SSO Configuration set, the system will be using that one. In case there is no configuration for that business unit, the system will be looking for a system wide configuration to perform the login operation.

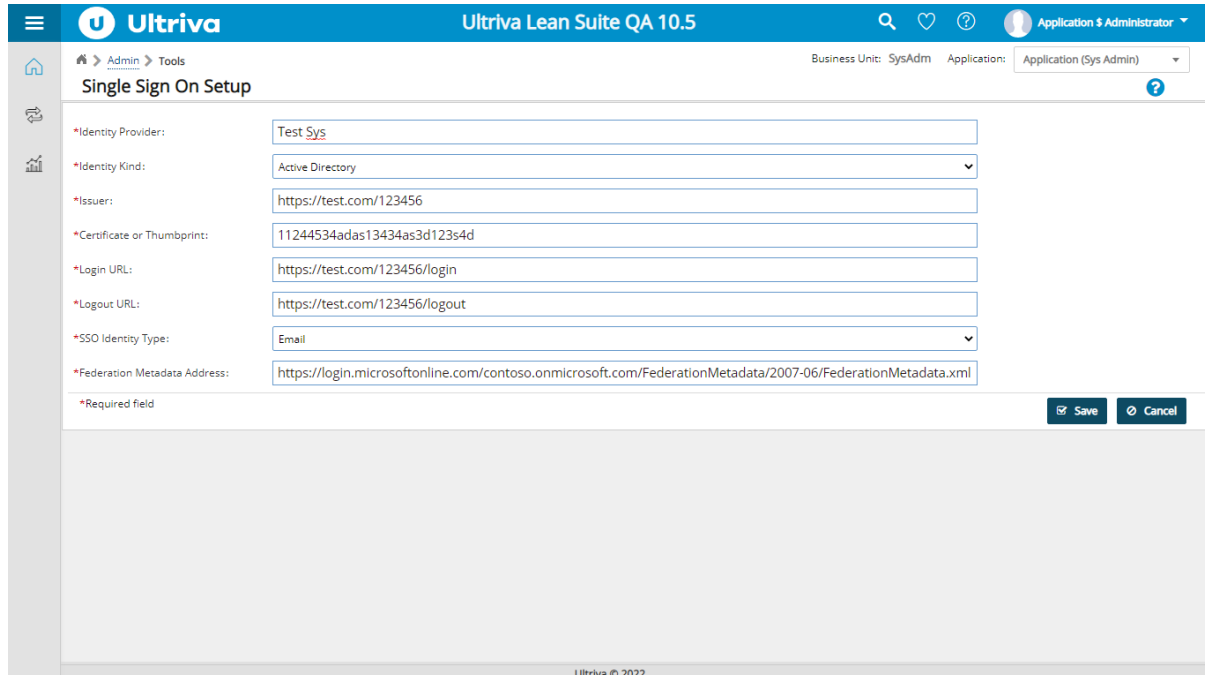
The system is just allowing ONE configuration per each business unit and ONE configuration for the whole system.



The screenshot displays the 'Single Sign On Setup' interface in the Ultriva Lean Suite QA 10.5 application. The page header includes the Ultriva logo, the application name, and the user role 'Application Administrator'. The breadcrumb trail shows 'Admin > Tools'. The main title is 'Single Sign On Setup'. Below the title, there are 'Edit' and 'Delete' buttons. A table lists the SSO configurations. The table has five columns: 'Identity Provider', 'Login URL', 'Issuer', 'Updated', and 'Updated By'. There is one row of data for 'Test Sys'. The footer of the page indicates 'Ultriva © 2022'.

| Identity Provider | Login URL | Issuer | Updated | Updated By |
|-------------------|-------------------------------|-------------------------|------------------------|-------------------------|
| Test Sys | https://test.com/123456/login | https://test.com/123456 | 05/29/2023 08:10:41 AM | engineering@ultriva.com |

When the user Adds/Edits a SSO Configuration the following form will be displayed allowing the user to set the values for the settings **provided by the Identity Provider**.



Ultriva Ultriva Lean Suite QA 10.5

Business Unit: SysAdm Application: Application (Sys Admin)

Single Sign On Setup

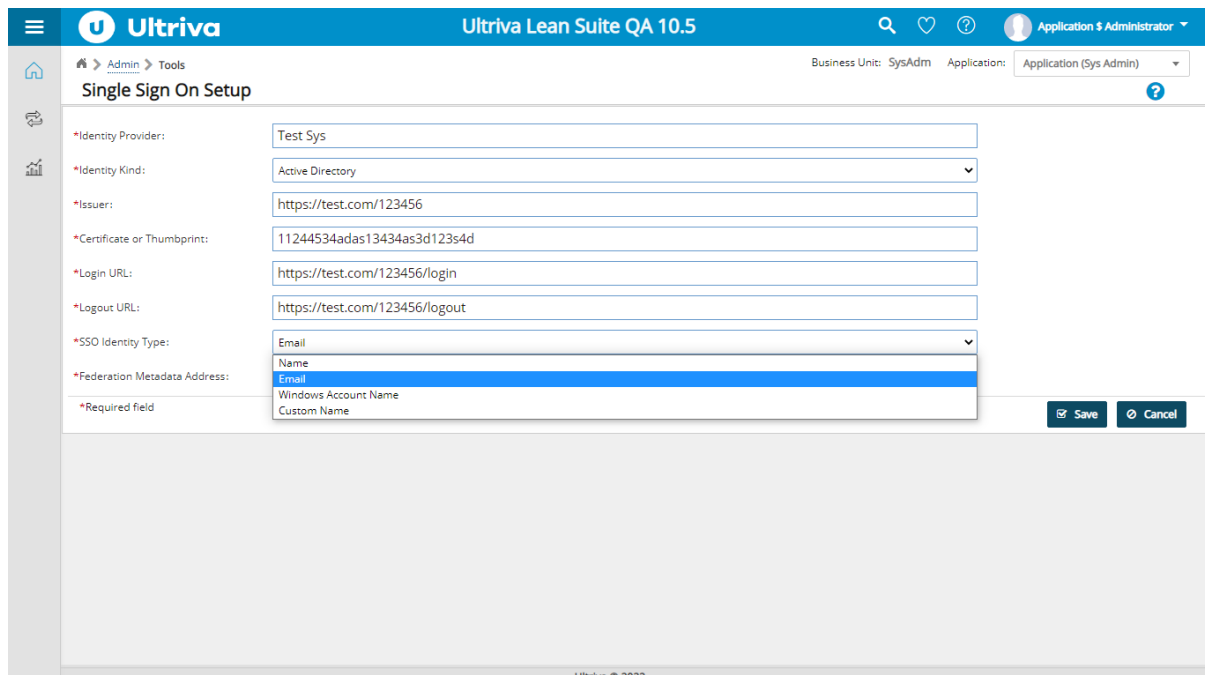
- *Identity Provider: Test Sys
- *Identity Kind: Active Directory
- *Issuer: https://test.com/123456
- *Certificate or Thumbprint: 11244534adas13434as3d123s4d
- *Login URL: https://test.com/123456/login
- *Logout URL: https://test.com/123456/logout
- *SSO Identity Type: Email
- *Federation Metadata Address: https://login.microsoftonline.com/contoso.onmicrosoft.com/FederationMetadata/2007-06/FederationMetadata.xml

*Required field

Save Cancel

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For the SSO Identity Type the user can define the claim name that will be used to do the SSO Assertion. The user can select Name, Email, Windows Account Name or enter a custom name in the format of the System.Identity.Claims.ClaimsIdentity type like "<http://schemas.xmlsoap.org/ws/2005/05/identity/claims/homephone>". Available custom claims should be obtained from here <https://learn.microsoft.com/en-us/dotnet/api/system.security.claims.claimtypes?view=netframework-4.8> for .NET 4.8 version.



Ultriva Ultriva Lean Suite QA 10.5

Business Unit: SysAdm Application: Application (Sys Admin)

Single Sign On Setup

- *Identity Provider: Test Sys
- *Identity Kind: Active Directory
- *Issuer: https://test.com/123456
- *Certificate or Thumbprint: 11244534adas13434as3d123s4d
- *Login URL: https://test.com/123456/login
- *Logout URL: https://test.com/123456/logout
- *SSO Identity Type: Email
- *Federation Metadata Address: https://login.microsoftonline.com/contoso.onmicrosoft.com/FederationMetadata/2007-06/FederationMetadata.xml

*Required field

Save Cancel

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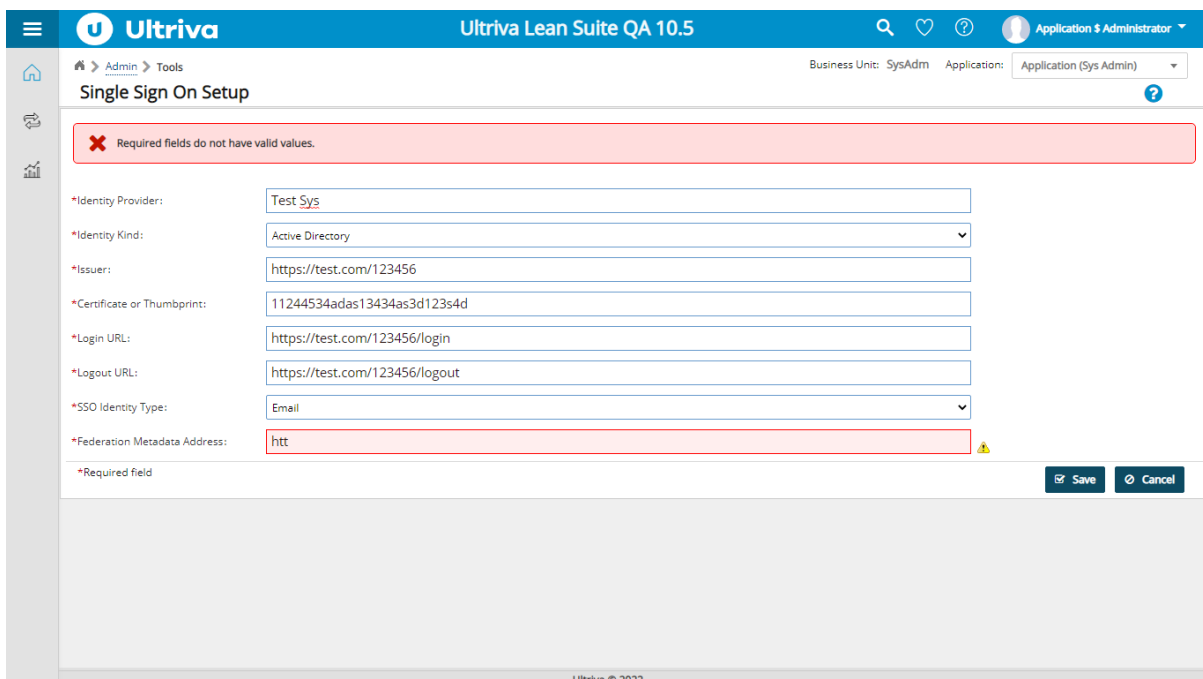
Ultriva supports these claim types:

- Name
- <http://schemas.xmlsoap.org/ws/2005/05/identity/claims/emailaddress>
- <http://schemas.microsoft.com/ws/2008/06/identity/claims/windowsaccountname>
- Custom Claim type: This field allows to configure any custom name returned by Identity provider

According to our system restrictions, whatever SSO identity type selected on dropdown should match with Ultriva username (LoginName in EboUser table).

e.g., If Email selected, then usernames who wants to use SSO should be equal to email. When you save the SSO configuration Ultriva application will verify Federation Metadata xml and add the valid ID provider to Issuer Name Registry and user will see on the screen valid SSO provider setup:

If Federation Metadata file is not accessible for any reason user cannot save the configuration and will see an error message:



The screenshot shows the 'Single Sign On Setup' page in the Ultriva Lean Suite QA 10.5 application. The page has a blue header with the Ultriva logo and navigation icons. A red error banner at the top states: 'Required fields do not have valid values.' Below this, the configuration form includes fields for Identity Provider (Test Sys), Identity Kind (Active Directory), Issuer (https://test.com/123456), Certificate or Thumbprint (11244534adas13434as3d123s4d), Login URL (https://test.com/123456/login), Logout URL (https://test.com/123456/logout), SSO Identity Type (Email), and Federation Metadata Address (htt). The Federation Metadata Address field is highlighted with a red border and a yellow warning icon. At the bottom right, there are 'Save' and 'Cancel' buttons. The footer indicates 'Ultriva © 2022'.

Bug Fixing

Error when running JobERPImportWOPDF for the same order (Job)

When the user uploaded a PDF for one of the jobs (Cards), then later they sent a new PDF for the same job, some of the IGParams of the card were overridden and it was causing issues when the user was trying to follow the regular workflow to close operations. **This issue was fixed.**

Bulk email at App CSR Level sending to disabled users

When the user was configuring Bulk Emails as System Administrator, the email was also sent to disabled users. Now the email is just delivered to active users. **This issue was fixed.**

Card Search Issues and fixed.

There were two issues related to the Search Cards feature.

- When the user was searching for cards, there was a mismatch between the Packing Slip Number displayed in the Card Search Result and the Card Details (Cycle Details – Audit Details). Now, the Packing Slip is showing the same in both screens. **This issue was fixed.**
- If you do that Card search on a different plant besides where the card was created, then click the card to get to the cycle details and audit details, we got a message saying, "No Cycles Completed", even when the card was cycled one time. **This issue was fixed.**