

PROCESS OVERVIEW

Purpose

The purpose of this transaction is for Organization (Org) and User Administrators (Admins) to review or modify user details in WBSCM. Admins will be able to update the user's name, contact information, and security roles for users within their own organization or sub-organization as follows:

- Org Admins can manage a user in their sub-organizations.
- User Admins can manage users only in their own organization.

The Admin can also lock or unlock user access to WBSCM or resend a registration/confirmation email to a user as required.

Process Trigger

Use this procedure to display or modify a user in WBSCM.

Prerequisites

- User performing this transaction must have the Org or User Admin role.
- User profile to be reviewed/updated must already exist in WBSCM.

Portal Path

Follow the Portal path below to complete this transaction:

• Select Admin tab → Manage Users tab → Manage Users link to go to the Manage Users screen.

Tips and Tricks

- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
 - Required (R) a mandatory field necessary to complete the transaction.
 - **Optional (O)** a non-mandatory field not required to complete the transaction.
 - Conditional (C) a field that may be required if certain conditions are met, typically linked to completion of a mandatory field.
- Refer to WBSCM Help site, *Frequently Referenced Training Materials* section for basic navigational training and tips on creating favorites, performing searches, etc.
- If the user is a Corporate Vendor Administrator (CVA) and needs to review or change user details for their own organization, refer to the <u>Display and Maintain User (Vendor)</u> work instruction.
- Refer to the <u>WBSCM User Administration</u> job aid for an overview of the User Administration process.



PROCEDURE

1. Start the transaction using the following Portal path: Admin tab → Manage Users tab → Manage Users tab → Manage Users link.

Image: Manage Users Screen

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	Admin > Manage Users > Manage Users		Full Screen Op	tions 🕶
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2. Click (the **Hide Navigator** arrow) to minimize the Portal menu. Note this can be done on any transaction in WBSCM.

(Note) The *Manage Users* screen content depends on the user's assigned role(s). For Org Admins, the organization and sub-organization(s) are listed in the *Organizations Selection* panel on the left. For both Org Admins and User Admins, the user details are listed in the *User Selection* panel on the right.

3. Perform one of the following:

lf	Then
Admin needs to review or modify user details for a sub-organization	Go to Step 4.
Admin needs to review or modify user details for own organization	Go to Step 9.



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- 4. Click Click (the Available Organizations arrow) next to the tree item at the top of the Organization Selection panel.
- 5. Click the Organization Search Criteria field.

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(Note) The sub-organizations listed in the *Organizations Selection* panel for each type of organization include:

- **FSA** Vendors or other sub-organizations (USAID, FAS, CPPAD, Private Voluntary Organizations (PVOs), Stevedores, and Freight Forwarders)
- AMS Vendors
- FNS Ship-tos, HQ Receiver, National WH (Warehouse), SDAs/ITOs, and Third Party Barter (SEAM)
- SDA Co-Ops and Recipient Agency
- Co-Op Recipient Agency
- Recipient Agency No sub-organizations
- HQ Receivers Dom Ship-tos
- Dom Ship-to No sub-organizations
- National WH No sub-organizations

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(Note) Only Org Admins for USDA agencies, and SDAs/ITOs can update users for their sub-organizations. Co-Ops can view but cannot make updates to users form their sub-organizations (RAs). Other Admins can update users for their own organization only.



(Note) In the Organizations Selection panel, for each organization, the Active Organizations and Inactive Organizations tabs display is dependent on the suborganization status. For example, if an organization only has active sub-organizations,



then only the **Active Organizations** tab will display and the **Inactive Organizations** tab will be hidden. In this example, the organization has both active and inactive suborganizations; therefore, both the **Active Organizations** and **Inactive Organizations** tabs are displayed.

Image: Manage Users Screen



6. As required, complete/review the following fields:

Field	R/O/C	Description
Organization Search Criteria	R	Field on a WBSCM screen used to define the criteria for a search.
		Example: *central*
		(Note) Use the wildcard symbol to search part of the name. Refer to the <u>Wildcard and Matchcode Searches</u> job aid for guidance on partial match searches.



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7. Click Search (the Search button) to search for the matching sub-organization(s).

Image: Manage Users Screen

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8. Select the appropriate sub-organization in the Organization Selection panel.



(Note) The users for the selected sub-organization will display in the Users Search panel.

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(Note) Confirm that the correct organization is selected in the Organization Selection panel

on the left. To return to the top-most organization, click Reset To Top Organization (the Reset to Top Organization button).



(Note) In this example, the **Central Texas Food Bank** has an active organization; therefore, only the **Active Organizations** tab displays.

Image: Manage Users Screen

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Central Texas Food Bank:	Jane Jones
	RA OrderManager
	RA OrderManager
	ATRA OrderManager 2019-07-16 10:08:44
	FA OrderManager 2021-04-8 12:29:31

9. If necessary, click 🖾 (the Drop-down arrow) in the User Search Criteria: field to select the first name.



(Note) If there are many users selected, it may be helpful to perform a search to find the user profile(s) that needs to be reviewed or updated.

(Note) Last Name is the default option for the User Search Criteria field. The user can select the First Name as a search option by clicking on 💌 (the drop-down arrow) and select First Name from the option list. In this example, Last Name is used.



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10. Perform one of the following:

lf	Then
Admin needs to search for an existing user by last name	Enter the Last name in the User Search Criteria field. ^{Last Name} (the Last Name option) is the default option.
Admin needs to search for an existing user by first name	Click First Name (the First Name option) from the User Search Criteria drop-down.





11. As required, complete/review the following fields:

Field	R/O/C	Description
User Search Criteria: (value)	R	First name or last name of the user to locate. Example:
		(Note) Use the wildcard symbol to search part of the name. Refer to the <u>Wildcard and Matchcode Searches</u> job aid for guidance on partial match searches.



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		ATRA	OrderManager	2019-07-16 10:08:44		
		RA	OrderMansger	2021-04-8 12:29:31		

12. Click Search (the Search button) to generate a list of matching user profiles in WBSCM.

Manage Users Screen

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13. Click (the **Selection** button) next to the user to be modified. In this example, **Jane Smith** is selected.



(Note) The User Details panel displays information for the selected user on the following three tabs:

- Personal Data User name, organization, and contact information
- Role Data User security role details
- Admin Data User account status and available actions

Image: Manage Users Screen

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		Emai:	jane smith@email.com	Time Zone:	Central Time (Dallas)
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		Mobile Phone:			
		Phone	555-555-1212	-	

14. Perform one of the following:

lf	Then
Admin needs to review the user profile details without making changes	Go to Step 15.
Admin needs to make changes to the user's name, contact information, and/or security roles	 Click Modify User (the Modify User button) to activate modify mode. Go to Step 15.
Admin needs to perform other administrative actions on the selected user profile	Go to Step 20.



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15. As required, complete/review the following fields:

Field	R/O/C	Description
Title:	0	A heading used before a surname or full name. (Note) Use (the Drop-down arrow) in the field to select the title.
First Name:	0	First name of the user. Example: Jane
Last Name:	0	Last name of the user. Example: Smith
Email:	O	Email address for user or organization. Example: janesmith@email.com (Note) This is the email address where the new registration email will be sent. The new user must have access to this email account.



Field	R/O/C	Description
Fax:	0	Fax number for the user or business partner.
Mobile Phone:	0	Cellular phone number where the user or
Phone:	0	Phone number for a user or organization. Example: 555-555-1212
Street Address:	0	A free text field to enter the main street address of the user or organization . Example: 280 W Highway 30
City:	0	City where the user or company is located. Example: Austin
Zip Code:	0	Zip code for the location of the user or organization. Example: 78701 (Note) Zip code is required even though it is not marked with a red asterisk. If the user leaves this field blank or enters the zip code in incorrect format, an error will occur and entry will need to be corrected before user can be created.
Country:	0	Country code that represents country name. Example: USA (Note) Use (the Drop-down arrow) in the field to select the country.



Work Instruction Display and Maintain User

Field	R/O/C	Description
State Or Province:	0	State where the user or organization is located.
		Example: Texas
		(Note) Use 💌 (the Drop-down arrow) in the field to select the state or province.
Time Zone:	0	Standard time for a region throughout the world.
		Example: Central Time (Dallas)
		(Note) Use 💌 (the Drop-down arrow) in the field to select the time zone.



(Note) Fields that are grayed out may not be edited.

16. Click Role Data (the Role Data tab) to review or update user role details.



(Note) The Role Data tab displays two columns that contain the following details:

- Available Roles All roles available but not yet assigned based on the user's
 organization. Note that different roles are available for each type of organization; refer to
 the <u>WBSCM Role Assignment Matrix</u> job aid for more information.
- Current Roles All roles currently assigned to the new user.

Image: Manage Users Screen

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required fields are marked with a red asterisk (*)			
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Perform the following as needed:	
lf	Then
Admin needs to assign a role to the selected use	 Click (the Selection button) next to the role in the Available Roles column. Click Add (the Add button) to assign the role to the user.
	(Note) Once assigned, the role will appear the <i>Current Roles</i> column.
Admin needs to unassign a role from the selecte user	 Click (the Selection button) next to the role in the Current Roles column. Click Remove (the Remove button) to unassign the role from the user.
	Once unassigned, the role will appear in the Available Roles column.
Admin has completed updates to Role Data	Go to Step 20.



(Note) If not already in modify mode, click Modify User (the Modify User button).

(Note) Each role must be assigned/unassigned individually. In this example, the **Org Admin - RA** role is added. Repeat the steps above as needed.

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18. Click **Save** (the **Save** button) to save any changes to the *Personal Data* and *Roles Data* tabs.



(Note) This button will only appear if modify mode was activated.

(Note) WBSCM displays a message that the user was updated successfully.

19. Perform one of the following:

lf	Then
Admin needs to review account status or perform administrative actions on the selected user profile	Go to Step 20.
Admin needs to delete the selected user profile	Go to Step 22.
Admin has completed all updates	Go to Step 24.

20. Click Admin Date (the Admin Data tab) to lock/unlock the user profile or resend WBSCM new user registration email instructions to the new user.

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21. Perform any of the following:

If	Then	
Admin needs to lock the user	1. 2. 3.	Click Modify User (the Modify User button) to activate modify mode. Click (the empty checkbox) next to User Locked to lock the user profile, preventing the user from accessing WBSCM. As applicable, provide information in the



Work Instruction Display and Maintain User

lf	Then
	 Reason Locked: field. 4. Click Save (the Save button) to save the changes.
Admin needs to unlock the user	 Click Modify User (the Modify User button) to activate modify mode.
	 Click I (the checked box) next to User Locked: to unlock the user profile, allowing the user to access WBSCM.
	 As applicable, provide information in the Reason Locked: field.
	 Click Save (the Save button) to save the changes.
Admin needs to send the WBSCM new user registration email to the user again	Click Resend New User Email (the Resend New User Email button) to have the system resend the new user registration email.
Admin has no further updates	Go to Step 24.

Image: Manage Users Screen

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leicome to Manage Users required fields are marked with a red asterisk (*) User Updated Successfully						
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Central Texas Food Bank						
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	Use	er ID:	SMITHJO	024	City:	Austin
	Little Fired	e: It Nama	Isna		Zip Code:	/8/01
	Les	t Name:	Smith		State Or Province:	Texas
	Eme	ei:	jane.smith	@email.com	Time Zone:	Central Time (Dallas)
		c				
	Fex					
	Fex. Mob	bile Phone:	12000/0102110	N/CO.		
	Fax Mot Pho	bila Phona: Ine:	000-000-1	212		

22. Click Delete User (the Delete User button) to remove the user.

(Note) Delete User (the Delete User button) is active only in display mode. If the user is in modify mode the button is grayed out and cannot be used.

п



Image: Confirm Delete User SMITHJ0024? Pop-Up

rusers masteruata urgenustion Maintenance nin ≻ Manage Users ≻ Manage Users					Full Screen
elcome to Manage Users required fields are marked with a red asterisk (*)					
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Active Organizations		B First Name	Last Na	me	Last Logon Date
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		Ves No 9 User Details Personal Company User ID. Title: First Name	Cocc4001181 SMTH-D024 Lare Lare Lare	Admin Data Street Address City. Zip Code: Courting:	280 W Hingway 30 Austin 78701 USA
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23. Click (the Yes button) to confirm in the *Confirm Delete User* pop-up window.



(Note) After a user profile is deleted, the Admin will no longer be able to search for or display the user in the *Manage User* screen; however, the User Security Report shows deleted users.



(Note) Refer to the <u>User Security Report</u> job aid to review a list of users and perform any required analysis.

24. The transaction is complete.



RESULT

User details have been reviewed or modified. This could include:

- Reviewed/updated personal data
- Reviewed/assigned/unassigned security roles
- Locked/unlocked user
- Resent WBSCM new user registration email
- Deleted the user



PROCESS OVERVIEW

Purpose

The purpose of this transaction is to display a delivery document in WBSCM. A delivery document is a document issued by a warehouse when goods are being shipped to the customer. Remember that delivery documents are only issued for goods coming out of a warehouse; they are not issued for goods sourced from a vendor.

Process Trigger

Use this procedure when you wish to display a delivery document for review and analysis. If your security access allows, you may also use this procedure to make changes to a delivery document.

Prerequisites

• Delivery Document must exist in WBSCM.

Portal Path

Follow the Portal path below to complete this transaction:

Select Operations tab
 → Warehouse Management tab
 → Delivery Management folder
 →
 Change Delivery Document link to go to the Change Delivery Document screen.

Tips and Tricks

- This transaction will not allow you to modify any fields.
- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
 - A **Conditional field**: an entry that becomes required as a result of entering something previous to it, which then deems it required.
 - An **Optional field:** you may enter information in an optional field, but an entry is not required for the completion of the transaction.
- Refer to WBSCM Portal Basic Navigation course for tips on creating favorites, perform searches, etc.

Reminders

- Remember to check your work.
- Refer to the Help Option (to the right of the screen) in the Portal for further assistance.



PROCEDURE

1. Start the transaction using the following Portal path: Operations tab → Warehouse Management tab → Delivery Management folder → Change Delivery Document

Change Outbound Delivery Screen

United States Department of Web-Based Supply (f Agriculture Welcome FNS User 1 Log Off	WBSCM
Home Operations Finance	Admin Reports Help	
Change Delivery Document	nsuauon recan Administration warenouse management	Back Forward
Detailed Navigation	Change Outbound Delivery	
Caracteria Management Delivery Management Outbound Delivery Monitor Create Delivery Document Change Delivery Document Dinventory Management Diventory Management Diventory Management Directory Delivery Document Directory Delivery Delivery Document Directory Delivery	Menu Back Exit Cancel System Display> Change More	
		D RI1 (230) 🗄 🗾

2. As required, complete/review the following fields:

Field	R/O/C	Description
Outbound Delivery	R	A unique number assigned to each delivery document that is created. Example: 80000004



Change Outbound Delivery Screen

United States Department of Web-Based Supply C	Agriculture	ent Welcome	FNS User 1	Ŀ	og Off	WBSCM
Home Operations Finance /	Admin Reports	Help				
Order Processing Complaint Admin	istration Recall A	dministration	Warehouse Mar	nagement		
Change Delivery Document						Back Forward
Detailed Navigation	Change Ou	utbound D	elivery			
Delivery Management Outbound Delivery Monitor Oreate Delivery Document Change Delivery Document Diventory Management Dive	Menu Back	Exit Cancel	System Dis	play ↔ Change	More	
						D RI1 (230) 🔨 🗾

3. Press **Enter** on your keyboard to process your entry and display the corresponding delivery document.

Outbound Delivery 80000004 Change: Overview Screen

USDA un W	nited States Department /eb-Based Supply	of Agriculture Chain Manageme	nt	Welcome FNS	User 1	Log Off	WBSCM
Home Ope	erations Finance	Admin Reports	Hel	P			
Order Process	ing Complaint Adm	nistration Recall Ac	Imini	stration War	ehouse Managemen	t.	
Change Deliver	y Document						Back Forward
Outbo	und Delivery 8	0000004 Cha	nge	e: Overvie	w		
Menu	Save Back Exit C	ancel System	ispla	ay <-> Change	Other Outbound Deliv	very Delete I	More
Ship-to part	4005166	Farm Servic	es Ad	ency (FSA) / 130	0 Independence Ave	/Washington D	C 20036
Item O	verview Picking I	oading Transport	s	tatus Overview	Goods Movement	Data	
Planned G	03/31/20	12:00	Tota	l Weight	356.000	LB	4
Actual GI d	late		No.	of packages			
All Items			_				
Itm	Material	Deliv. Qty	Un	Description		1	ITyp Bat
10	100007	8.000	CS	CHEESE CHEE	WHT-BLOCK 40 LB		ZPSSC DB-
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4. Click Picking (the Picking tab) to display picking details.



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(Note) The delivery document displays. At the top of the delivery document you can view information on the sold-to and ship-to party as well as the specific warehouse from which goods are being sourced.

The first tab you will see is the **Item Overview** tab. On the **Item Overview** tab you will see general information on the order such as the planned and actual GI dates, the total weight, and the total number of packages. A table will outline all items being delivered in the shipment (not necessarily all items on the sales order - only the ones being delivered with this particular delivery).

Outbound Delivery 80000004 Change: Overview Screen

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5.

Click Loading (the Loading tab) to display loading details.

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(Note) If your security permissions allow, you will be able to post goods issued from this tab. A post goods issue is a transaction where the warehouse picks goods from their shelves and issues goods out of the warehouse, handing them over to a transportation provider to transport them to the customer. You may wish to pick and post goods issue (PGI) goods, or you may simply wish to view this tab for review and analysis, to see which materials and which quantities have been picked and issued.



Outbound Delivery 80000004 Change: Overview Screen

	Web-Based	Supply Chair	n Manageme	ent	Welcome FNS	S User 1	1	Log Off	AR7C	My
ome O	perations F	inance Admir	n Reports	Hel	p					
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nange Deliv	very Document							1	Back Forw	ard 🗐
Outbo	ound Deli	ivery 8000	0004 Cha	nge	e: Overvie	ew			100	1
Menu	Save Back	Exit Cancel	System, I	Displa	ay <-> Change	Other Outbo	und Delivery D	Delete More		
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Ship-to pa	arty 40	005166	Farm Servic	Les Ag	jency (FSA) / 13	soo maepena	ence Ave / wash	ingion DC 20	030	
Ship-to pa Item Loading Door for	overview Pi Date (Whse)	cking Loadin 03/31/2009 1	g Transport	Loa Stag	tatus Overview ding Point ging Area	Goods Me	wement Data		030	
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6.

Click Transport (the Transport tab) to display transport information.

(Note) The **Loading** tab gives you information on when and where goods were loaded onto a truck or railcar. This includes the loading point and loading date, as well as the materials, weights, and batches that were included in the shipment.

Outbound Delivery 80000004 Change: Overview Screen

SDA u	nited States Departmer	nt of Agriculture y Chain Managerr	nent ^{We}	lcome FNS (Jser 1	<u>Log (</u>	WBS	CM
lome Op	erations Finance	Admin Reports	Help					
order Process	sing Complaint Ad	ministration Recall	Administr	ation Ware	house Manag	ement		
hange Delive	ry Document						Back F	orward [
Outbo	und Delivery	80000004 Ch	ange:	Overview	v		[
Ship-to par Item O TransptnF Tros plan	ty 4005166 verview Picking Planng 03/31/2 stat Not	Farm Server	rices Agen rt Statu Route Route	cy (FSA) / 1300	Goods Mover	e Ave / Washingto ment Data	n DC 20036	
All Items	8 Material	Gross Weight	Un	Volume	V	Deliv. Qty	Un Desc	ripti (
10	100007	356.000	LB			8.000	CS CHEE	ESE -
<u> </u>							D RI1 (23	30) 🔨 💆

7. Click Status Overview (the Status Overview tab) to display status information on the order.



(Note) The **Transport** tab provides information on the date and time when transportation is scheduled, the route that will be used, the schedule for that route, and all items to be transported along that route.

Outbound Delivery 80000004 Change: Overview Screen

operation	ons Fin	ance	Admin	Report	s H	elp							
er Processing	Compla	aint Admi	inistration	Reca	ill Admi	nistration	n Wa	rehouse	Manage	ment			
nge Delivery Do	cument											Back	Forwa
Outboun	d Deliv	verv 8	00000	004 CI	hang	e: Ov	ervie	w					70
Menu, Sav	e Back	Exit	ancel	System,	Disp	lay <-> C	hange	Other O	utbound	Delivery	Delete I	Nore	
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8. Click Goods Movement Data (the Goods Movement Data tab) to display a transaction history of goods movements.

(Note) The **Status Overview** tab provides information on the status of the delivery including the delivery document number, and the stage the order is in.



Outbound Delivery 80000004 Change: Overview Screen

USDA United States Department of Agriculture Web-Based Supply Chain Management Welcome FNS User 1 Log Off	CW)
Home Operations Finance Admin Reports Help	
Order Processing Complaint Administration Recall Administration Warehouse Management	
Change Delivery Document Back For	ward 🗐
Outbound Delivery 80000004 Change: Overview	9
Menu Save Back Exit Cancel System Display -> Change Other Outbound Delivery Delete More	
Shin-to party 4005166 ET Farm Services Agency (ESA) / 1300 Independence Ave / Washington DC 20036	
Item Overview Picking Loading Transport Status Overview Goods Movement Data PI. gds mvmt 03/31/2009 12:00 TotalGdsMvtStat Not yet started Act. gds mvmt Image: Control of the started Image: Control of the started Image: Control of the started	
All items	
Itm ITyp PInt SLoc Material Deliv. Qty Un M Batch Val. Type Cost Center	
10 ZPSS3000 1000 100007 8.000 CS 601 DB-1001682	
▲ RI1 (230	

9. Click Save (the Save button) to save any changes you have made.

(Note) On the **Goods Movement** tab, you are provided with an in-depth look at the materials being delivered, including the plant, storage location, batch, material, quantity, and unit of measure for the commodities being moved.

10. You have completed this transaction.

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RESULT

The transaction has been successfully completed.



PROCESS OVERVIEW

Purpose

The purpose of this transaction is to search for and display a domestic requisition in WBSCM. Recipient Agencies, Co-ops, State Distributing Agencies, and Indian Tribal organizations would use this procedure when they wish to see the items on a requisition, check the status, or find out header level details such as the ship-to location or net pricing. If the requisition is in "Draft" status or has been returned to the user, individuals with access to modify the requisition may click "Change" and make edits to it. Using this procedure, you may make modifications to the domestic requisition which includes editing both header level and transactional details.

Process Trigger

Perform this transaction when you need to search for or display a domestic requisition.

Prerequisites

Domestic Requisition must exist in WBSCM.

Portal Path

Follow the Portal path below to complete this transaction:

• Select Operations tab → Order Processing tab → Order Management folder → Domestic Order Entry link to go to the *Domestic Order Entry* screen.

Tips and Tricks

- This transaction will not allow you to modify any fields.
- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
 - A **Conditional field**: an entry that becomes required as a result of entering something previous to it, which then deems it required.
 - An **Optional field:** you may enter information in an optional field, but an entry is not required for the completion of the transaction.
- Refer to WBSCM Portal Basic Navigation course for tips on creating favorites, perform searches, etc.

Reminders

- Remember to check your work.
- Refer to the Help Option (to the right of the screen) in the Portal for further assistance.



PROCEDURE

1. Start the transaction using the following Portal path: Operations tab → Order Processing tab → Order Management folder → Domestic Order Entry

Domestic Order Entry Screen

United States Department of Agriculture Web-Based Supply Chain Management	Welcome Regression CoopRA	Log Off	WBSCM
Home Operations Admin Reports Help Order Processing			
Domestic Order Entry			Back Forward
Detailed Navigation My Transactions Catalog	Entitlement 🗵 Iransaction in Process		
C Order Management Domestic Order Entry Distribution Receipts			
► CI NW Delivery Calendar	Welcome		
Portal Favorites Quick Search General Extended Search Extended Search	Welcome to the order entry arreen Image: Click here to create an order and specify the ship-to destination. Then choose the items from left.	the catalog.	located on the
[+]CSFP [+]CACFP	Product Catalog		
	Brows in the Product Catalog		

2. Click **I** (the **Hide Navigator** button) to hide the Portal menu. Note that this can be done on almost any transaction in WBSCM - not just Order Management transactions.



Domestic Order Entry Screen

United States Department of Agriculture Web-Based Supply Chain Managem	ent	Welcome Regression CoopRA	Log Off	WBSCM
Home Operations Admin Reports Help				
Order Processing				I Back Engineer E
bomesaic order entry				Back Forward
My Transactions Catalog Entitlement	Transaction in Process			10
Product Catalog				
	Welcome			
Quick Search	Welcome to the order entry screen			
Search	Click here to create an order and specify the ship-to destination. The	in choose the items from the catalog located on the le	ft.	
Extended Search				
(+)CSFP (+)CACFP	Product Catalog			
	Browne in the Product Cetalog			
https://whermint.wherm.usda.cov/whermh2h/h2b/hearler.do#	8	√ Trusted sites	6	• 😤 100% • .:

3. Click <u>My Transactions</u> (the My Transactions link) to perform a search for existing transactions.



(Note) The **My Transactions** screen can be used to search for domestic requisitions. The difference between a domestic requisition and a sales order is that a requisition is created by an RA, Co-op, SDA, or ITO, and needs to be consolidated and escalated to FNS for approval. A domestic requisition is not yet a sales order until it has been approved by the Sponsoring Agency. A sales order is created by an FNS Order Manager from the **Maintain Sales Documents** screen or from a consolidated set of requisitions.



My Transactions Screen

United States Department of Agriculture Web-Based Supply Chain Manager	ent Welcome Regression CoopRA !	Log Off	WBSCM
Home Operations Admin Reports Help			
Order Processing			I Back Engineers
My Transactions Catalog Entitlement	岡 Iransaction in Process		I TUTE L'ALMONT
Search For Orders V Status Open V Creation Date Since Yesterday V ID Type Transaction V ID			

4. In the Search For field, click on the Dropdown button.

United States Department of Agriculture Web-Based Supply Chain Management <u>USDA</u> WBSCM Home Operations Admin Reports Help Order Processing Domestic Order Entry | Back My Transactions Catalog | Entitlement Transaction in Process Transactions Search For Orders V Status Order Creation Date Since Yesterday V Product Catalog Browse in the Product Catalog Transaction ID Type * ID New Transaction Go Elick here to create an order and specify the ship-to destination. Then choose the items from the catalog located on the left. 🗸 Trusted sites 🧳 🔩 🔩 100% * From the Dropdown list, select Orders (the Orders option).

My Transactions Screen

5.



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(Note) The **Order Items** from the dropdown list can be selected if the material ID is known. The **Order Items** option allows you to search for requisitions by material. Selecting this option will display a subsequent free-text field to enter a material ID number. Only orders that contain this material ID number will display in the results.

My Transactions Screen

United States Department of Agriculture Web-Based Supply Chain Manager	nent Welcome Regression CoopRA Leg	WBSCM
Home Operations Admin Reports Help		
Order Processing Domestic Order Entry		I Back Forward
My Transactions Catalog Entitlement	Iransaction in Process	
Search For Orders V Status Open V Greation Date Open ID Type Completed	Product Catalog Browse in the Product Catalog	
60	Elick here to create an order and specify the ship-to destination. Then choose the items from the catalog located on the left.	

6. In the Status field, click on the Dropdown button. From the Dropdown list, select Any (the Any option).

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(Note) Selecting *Any* will ensure that the results list contains requisitions in both the open and completed statuses.

Selecting **Open** will display only those requisitions that are in open status (i.e. those that are drafted, submitted, or approved).

Selecting **Completed** will display only those requisitions that are in completed status (i.e. those that have been delivered or cancelled).



My Transactions Screen

United States Department of Agriculture Web-Based Supply Chain Manager	nent Welcome Regression CoopRA		CW
Home Operations Admin Reports Help			
Order Processing Domestic Order Entry		L Back For	ward E
My_Transactions Catalog Entitlement	Iransaction in Process	1 444	
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	J Tr	ested sites 💿 🔹 🏦 1005	

7. In the Creation Date field, click on the Dropdown button. From the Dropdown list, select Last 12 Months (the Last 12 Months option) to display requisitions created in the last 12 months.



(Note) Select Today to display requisitions created today.

Select **Specific Date** to display requisitions created on a specific date. If you select this option, a free-text field will display asking you to indicate the specific date.

Select *In Period* to display requisitions created in a specific period. If you select this option, a free-text field will display asking you to indicate the specific period.

Select Since Yesterday to display requisitions created yesterday and today.

Select Last 7 Days to display requisitions created in the last 7 days.

Select Last 30 Days to display requisitions created in the last 30 days.

Select Last 12 Months to display requisitions created in the last 12 months.

If you know the specific requisition number, you may include this in your search criteria. To do so, select *Transaction* from the *ID Type* field. Then enter the requisition number in the *ID* field.



My Transactions Screen

United States Web-Base	Department of Agriculture Supply Chain Manager	ent	Welcome Reg	ression CoopRA	Log Off	WBSCM
Home Operations	Admin Reports Help					
Order Processing						
Domestic Order Entry						Back Forward
My Transactions	Catalog Entitlement	Iransaction i	Process			
Transactions						
Search For Orders Status Any	v 	Product Catalog				
Creation Date Last 12 ID Type Transact	ionths 💉	Browse in the <u>Product Catalog</u>				
ID	Go	New Transaction				
	Start S	 Click here to create an order and specify th ection -Button 	e ship-to destination. Then choose the it	ms from the catalog located on the le	ft.	
https://wbsomint.wbsom.usda.go	v/wbscmb2b/b2b/updateorganizero	t.do#		✓ Trusted sites	4	• 🔍 100% • .:

8. Click Go (the Go button) to execute the search.

My Transactions Screen

United States Department of Agriculture Web-Based Supply Chain Manage	ment	Welcome Regression CoopRA	Log Off	WBSCM
Home Operations Admin Reports Help				
Order Processing				
Domestic Order Entry				Back Forward 📃
My Transactions Catalog Entitlement	Transaction in Proc	ess		
Transactions				
Search For Orden V Status Any V Creation Date Last 12 Months V 10 Type Transaction V	Product Catalog Broke in the <u>Product Catalog</u>			
Co 29 Document: Found Status	New Transaction Click <u>here</u> to create an order and specify the ship-to	a destination. Then choose the items from the catalog located on the	left.	
VDate Transaction Your Reference Open 03/05/2013 1000031884				
02/21/2013 1000031795				
Op=n 02/12/2013 1000031769				
Open 01/31/2013 1000031744 Orange				
Open 01/31/2013 1000031746 blue				
Open 01/29/2013 1000031734				
Open 01/29/2013 1000031733				
Completed 01/08/2013 1000031608 Test: Multi Food Outbound test				
ittps://wbscmint.wbscm.usda.gov/wbscmb2b/b2b/documentstatusd	etailorepare.do?techkey=3938095170D75761E1000000C7869E498object	id- 🗸 Trusted sites	4	a • € 100% • .:

9. Select the requisition from the list of search results. In this case, we selected 1000031744 (the 1000031744 link).



Domestic Order Entry Screen

Processi	ng											
stic Order	Entry											Back Forv
Transac	tions Ca	talog Entitlement				1.	Transac	tion i	in Process			
ransactio	ns		4 Ord	er: 10	000317	44 from 0	1/31/2013	13:14	4			
ch For	Orders	v	Hide Nav Your Deliv	igator Refere Descrip	ption: dress:	Orange Apple 50029431	12-07 Regr	ession	, SPRINGFIELD, NH		Total Nat Prices	462,344.94 US
tion Date /p=	Last 12 Mon Transaction	ths 💌	Ade	ditional	l Comme	entsi						5
		Go										
cuments	Found				Item	Product	Quantity	Unit	Description	User Status	Program	Total Price Unit Price
atus Date	Found <u>Transaction</u>	Your Reference			Item	Product	Quantity 5.000.000	Unit CS	Description BEEF W/TOMATO SAUCE CND-24/24 OZ	User Status Draft	Program CACPP / Entitlement	Total Price Unit Price 270,000.00 USD 150.00 USD / 100 LB
Date 5/2013	Found <u>Transaction</u> 1000031884	Your Reference	<	Item 100 200	Product 130142 130530	Quantity 5.000.000 675.000	Unit Cs CS	Description BEEF W/TOMATO SAUCE CND-24/24 OZ CEREAL CORN FLKS -SUBST	User Status Draft Draft	Program CACEP / Entitlement CACEP / Entitlement	Total Price Unit Price \$ 270,000,00 USD 150.00 USD / 100 LB \$ 38.097.09 USD 418.07 USD / 100 LB
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cuments atus Date 5/2013 plet=d 1/2013 2/2013 1/2013	Found Transaction 1000031884 1000031755 1000031755 1000031755 1000031755	Your Reference Orange			Item 100 200 210 220 230	Product 130142 130530 130927 130449 130926	Quantity 5.000,000 675.000 675.000 542.000	Unit CS CS CS CS	Description BEEF W/TOMATO SAUCE CHD-24/24 OZ CEREAL CORN FLKS -SUBST CEREAL CORN FLKS 1344 PKG-12/18 OZ CEREAL CORN FLKS 1080 PKG-12/18 OZ CEREAL CORN FLKS 1440 PKG-R/18 OZ	User Status Draft Draft Draft Draft Draft Draft Draft	Program CACPP / Entitlement CACPP / Entitlement CACPP / Entitlement CACPP / Entitlement CACPP / Entitlement	Total Price Unit Price 270.000.00 USD 150.00 USD / 100 LB \$ 38.097.09 USD 418.07 USD / 100 US \$ 0.00 USD / 100 US
atus Date 5/2013 pleted 1/2013 1/2013 1/2013 1/2013	Found Transaction Transaction 1000031884 1000031785 1000031764 1000031746 1000031746	Your Reference			Item 100 200 210 220 300	Product 130142 130530 130927 130449 130926	Quantity 5.000.000 675.000 675.000 542.000 723.000	Unit CS CS CS CS CS	Description BEEF W/TOMATO SAUCE C/ID-24/24 OZ CEREAL CORN FLKS -SUBST CEREAL CORN FLKS 1344 PKG-12/18 OZ CEREAL CORN FLKS 1340 PKG-12/18 OZ CEREAL CORN FLKS 1440 PKG-R/18 OZ CEREAL RORN FLKS 1440 PKG-R/18 OZ CEREAL RICE CRISP-SUBST	User Status Draft Draft Draft Draft Draft Draft Draft Draft	Program. CACEP / Entitlement CACEP / Entitlement CACEP / Entitlement CACEP / Entitlement CACEP / Entitlement	Total Price Uait Price 270.000.00 USD 150.00 USD / 100 LB \$ 38.097.09 USD 418.07 USD / 100 US \$ 0.00 USD / 100 US \$ 0.00 USD / 100 USD

10. The requisition displays in the main pane. Click (the **Hide Navigator** button) to hide the search results.

Domestic Order Entry Screen

Diam.	Oper	ations	Admin Rep	xorts Help					
tic (Drder	Entry							Back Fo
Tra	insa	tions	Catalog	Entitlement		Transaction in Process			
Inde	r: 10	00031	744 from 01/3	1/2013 13:14					
our l	Refer Descr	ence: iption: idress:	Orange Apple 5002943: 12	-07 Regression, SPi		о. NH 🔤		Total Net Pric	e: 462,344.94 USI
Add	itions	l Comm	ents:						8
		Item	Product	Quantity	Unit	Description	User Status	Program	Total Price Unit Price
	•	100	130142	5,000,000	CS	BEEF W/TOMATO SAUCE CND-24/24 OZ	Draft	CACFP / Entitlement	\$ 270.000.00 USD 150.00 USD / 100 LB
		200	130530	675.000	CS	CEREAL CORN FLKS -SUBST	Draft	CACEP / Entitlement	\$ 38.097.09 USD 418.07 USD / 100 LB
		210	130927	675.000	CS	CEREAL CORN FLKS 1344 PKG-12/18 OZ	Draft	CACEP / Entitlement	\$ 0.00 USD \$0.00 USD / 1000 LB
		220	130449	\$42.000	ĊS	CEREAL CORN FLKS 1080 PKG-12/18 OZ	Dr#ft:	CACFP / Entitlement	\$ 0.00 USD \$0.00 USD / 1000 LB
			130926	723.000	CS	CEREAL CORN FLKS 1440 PKG-8/18 OZ	Dr#ft	CACFP / Entitlement	\$ 0.00 USD \$0.00 USD / 1000 LB
		230		540.000	CS	CEREAL RICE CRISP -SUBST	Dr. ft.	CACFP / Entitlement	\$ 29,582.37 USD 456,50 USD / 100 LB
		300	130749	540.000					



11. At the top of the screen, view the header level details on the requisition including the customer number, reference, description, delivery information, overall status, and net price. Scroll down to display more information on the requisition.

Pro	cess	ing	Admin Rep	ons Help					
tic	Order	Entry							Back For
Tra	insa	ctions	Catalog	Entitlement		Transaction in Process	i		
Irde	ar: 10	000031	744 from 01/3	1/2013 13:14					
	Befer	iption:	Orange Apple					Total Net Price	462,344.94 USD
eliv	ery A	dress:	5002943: 12-	07 Regression, SPF	INGFLEL	р, <mark>NH</mark> 🔀			
Add	ition	sl Comm	entsi						<u> </u>
									w.
		Item	Product	Quantity	Unit	Description	User Status	Program	Total Price Unit Price
	-	100	130142	5,000,000	CS	BEEF W/TOMATO SAUCE CND-24/24 OZ	Draft	CACEP / Entitlement	\$ 270.000.00 USD 150.00 USD / 100 LB
	•	200	130530	675,000	CS	CEREAL CORN FLKS -SUBST	Draft	CACEP / Entitlement	\$ 38.097.09 USD 418.07 USD / 100 LB
		210	130927	675.000	CS	CEREAL CORN FLKS 1344 PKG-12/18 OZ	Draft	CACEP / Entitlement	\$ 0.00 USD \$0.00 USD / 1000 LB
		220	130449	\$42.000	ĊS	CEREAL CORN FLKS 1080 PKG-12/18 OZ	Dr#ft:	CACFP / Entitlement	\$ 0.00 USD \$0.00 USD / 1000 LB
		230	130926	723.000	CS	CEREAL CORN FLKS 1440 PKG-8/18 OZ	Dr#ft	CACEP / Entitlement	\$ 0.00 USD \$0.00 USD / 1000 LB
		300	130749	540.000	CS	CEREAL RICE CRISP -SUBST	Dreft	CACFP / Entitlement	\$ 29,582.37 USD 456.50 USD / 100 LB
		310	130455	540.000	CS	CEREAL RICE 1080 PKG-16/12 OZ	Draft	CACFP / Entitlement	\$ 0.00 USD \$0.00 USD / 1000

12. You have completed this transaction.



Work Instruction Display Domestic Requisition

RESULT

You have %s.



PROCESS OVERVIEW

Purpose

The purpose of this transaction is for SDA and RA Order Managers to view entitlement, order balances and totals. Using this transaction, SDAs and RAs will be able to view the balance from the current and previous program years. This is the same as reviewing an Entitlement Bonus Summary report. Additional actions include:

- Filter and customize balance output
- Export to spreadsheet format
- Save as PDF or print output

Process Trigger

Use this procedure to display, print, or save entitlement balance information.

Prerequisites

 SDA must have entitlement assigned or transactions posted for the specified program year in WBSCM.

Portal Path

Follow the Portal path below to complete this transaction:

Tips and Tricks

- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
 - A Required field (R): a mandatory field necessary to complete the transaction
 - o An Optional field (O): a non-mandatory field not required to complete the transaction
 - A Conditional field (C): a field that may be required if certain conditions are met, typically linked to completion of a mandatory field
- Refer to the WBSCM Portal Basic Navigation course for tips on creating favorites, perform searches, etc.



PROCEDURE

1. Start the transaction using the following Portal path: Operations tab → Order Processing tab → Order Management folder → Domestic Order Entry link.

Image: Domestic Order Entry Screen

File Uploads/Downloads			Tai Colori Opiono
 Catalog Maintenance Order Management Consolidate Requisitions 	MV Iransactions Catalog Product Catalog	Transaction in Process	
Domostic Ordor Entry Full Truck Load and Transfe Redistribute Order Quantities Returned FNS Orders Shipment Receipts NW Delivery Calendar	Quick Search Search Extended Search [+]CSFP [+]CSFP [+]TFFAP [+]NSFP [+]NSFP [+]SFSP [Welcome to the order entry screen As an SDA/ITO you have the option of creating orders for your SDA/ITO organization or on behalf of individual RAs. Image: Select Continue to enter an order for your SDA/ITO organization Image: Select Continue to enter an order on behalf of one of your RAs, enter Business Partner number/name here: Image: Select Continue button above.	r/choose their and then select
	[+]DA [+]TM_TE	Browse in the <u>Product Catalog</u>	

2. Click (the **Hide Navigator** arrow) to minimize the Portal menu. Note that this can be done with any transaction in WBSCM.

Image: Domestic Order Entry Screen

Operations > Order Processing >	rder Management > Domestic Order Entry Full Screen Optio
My Transactions <u>Catalog</u> Product Catalog	Entitlement 🔛 Transaction in Process
	Welcome
Quick Search	Welcome to the order entry screen As an SDA/ITO you have the option of creating orders for your SDA/ITO organization or on behalf of individual RAs.
Extended Search	Select Continue to enter an order for your SDA/ITO organization
+]CSFP +]FDPIR +]TEFAP +]NSIP	If you would like to enter an order on behalf of one of your RAS, enter/choose their Business Partner number/name here:
+]CACFP +]SFSP +]NSLP	Product Catalog
+]DA +]TM_TE	Browse in the Product Catalog



3. Click Entitlement (the Entitlement link) to execute a query on entitlement balances, which opens the search in a new window.



(Note) From this screen, the following functions are also available:

- Click <u>My Transactions</u> (the **My Transactions link**) to search for and display requisitions that have previously created.
- Click <u>Catalog</u> (the Catalog link) to view the FNS Catalog, where they can select commodities and create a new requisition.
- Click Transaction in Process (the Transaction in Process button) to return to an active shopping cart that has not yet been submitted.

Image: Entitlement/Bonus Summary Report Screen

SWBSCM : Reports - Internet Explorer	
https://wbscmintdsl.wbscm.usda.gov/sap/bc/webdynpro/sap/zecc_wbscm_reports?variant_name	=VAR_034&sap-client=100
Reports : Input Criteria	
De Execute Print PDF Output	
Entitlement/Bonus Summary Report @	
Co Show	Variants
Program: * 🗘 🗇 🗇	
Program Year: * 🛇 📃 To 📄	
SDA Region Code: 🔷 🗖	
RA / SDA Number: 📕 4000578 🗇	
Sold-To State \land 🗇	

4. As required, complete/review the following fields:

Field	R/O/C	Description
Program: *	R	Abbreviation for the specific program through which the user places their orders. If the program abbreviation is unknown, use the WBSCM search functionality to locate it. Example: NSLP



Field	R/O/C	Description
Program Year	R	Year when the customer will be able to use the funds allocated for the specific program. Example: 2016
		(Note) To select a range of years when generating a report enter the ending year in the To field.
SDA Region Code	0	Code assigned to SDA based on their location.
RA / SDA Number	0	Number assigned to RA / SDA based on their ID. (Note) The RA/SDA Number is pre- populated to the organization linked to the user's login ID.
Sold-To State	0	State of the user's customer organization.



Image: Entitlement/Bonus Summary Report Screen

WBSCM : Reports - Internet Explorer	>
https://wbscmintdsl.wbscm.usda.gov/sap/bc/webdynpro/sap/zecc_wbscm_reports?variant_name=VAR_034&sap-client=100	
leports : input Criteria	
Execute Print PDF Output	
intitlement/Bonus Summary Report 🖫	
Reset Values	
C Show Variants	
Program: * 🛇 NSLP 🗇 🖻	
Program Year: * 🔷 2016 To 2018 🖻	
DA Region Code 🔗 🗖	
A / SDA Number 📕 4000578 🗇	
Sold-To State 🔍 🗇 To 🗍 🕏	

5. Click Execute (the Execute button) to review the report details.



(Note) The following options are available:

- Use Print PDF Output (the Print PDF Output button) to generate the report as a formatted PDF file to print, save, or share.
- Use Reset Values (the Reset Values button) to clear the fields and reset the selection criteria.
- Use in (the Yellow Arrow button) to enter additional selection criteria, such as expanding a field to include a range of values.
- Use 🗇 (the Matchcode button) to view a list of available values in a popup window.
- Use Show Variants (the Variants link) to display a previously saved customized report output associated with the user's login ID.
- Use Export a (the Export button) to generate a spreadsheet from report data, which can be further organized and analyzed using Microsoft Excel or another spreadsheet tool.



Image: Entitlement/Bonus Summary Report Screen

WBSCM : I	Rep	orts - Internet E	xplorer						<u>990</u> 9		X
https://wb	scn	nintdsl.wbscm.u	usda.gov/sap/bc/webdyn	pro/sap/zecc_wbsci	m_reports?variant_nan	ne=	VAR_0348csap-client	= 100			
ntitleme	nt/	Bonus Sun	nmary Report . 🕾								
🗢 Go Back		Print PDF C	Dutput								
View: EN	тіт	LEMENT_SUMI	Export 4							7	æ
Program	£	Sold-To Party	Sold-To Name	Sold-To City	Sold-To State	4	Program Year ≞	Begining Balance	DOD Fr	resh Amo	ount
NSLP		4000578	TX Dept. of Agriculture	AUSTIN	TX		2016	2,000,000.00		50,000	0.00
		4000578	TX Dept. of Agriculture	AUSTIN			2017	200,000.00		50,000	0.00
		4000578	TX Dept. of Agriculture	AUSTIN			2018	1,440,061.48		5,000	0.00
						1		1. (7), (9) (7),		940	

6. As required, complete/review the following fields:

Field	R/O/C	Description
Program	0	Acronym to identify a USDA food distribution program.
Sold-To Party	0	Unique identifying name associated with a particular customer in WBSCM. (Note) RA's can view only their own entitlement, SDAs can view any subordinate RA's entitlement by changing the Sold-To Party field.
Sold-To Name	0	Unique identifying name associated with a particular customer in WBSCM.



Field	R/O/C	Description
Sold-To City	0	City of the user's customer organization.
Sold-To State	С	State of the user's customer organization.
Program Year	0	Year when the customer will be able to use the funds allocated for the specific program.
Beginning Balance	0	Balance that was granted to the organization at the beginning of the program year - not the current balance.
DOD Fresh Amount	0	Amount allocated for USDA DOD Fresh orders.
Entitlement Order Total	0	Total entitlement dollar amount that has been spent for orders for the respective program and program year.
Entitlement Pounds	0	Total weight (in pounds) for the commodities that have been ordered by the user's organization through this entitlement program during this program year.
Entitlement Balance	0	Remaining balance (in dollars) for this program and program year.
Bonus Order Total	0	Total (in dollars) spent on bonus orders for the respective program and program year. Bonus orders do not deduct from entitlement balance. This field is for tracking purposes.



Field	R/O/C	Description
Bonus Pounds	0	Total weight (in pounds) for the commodities that have been ordered by the user's organization as bonus.
Trade Pounds	0	Total (in dollars) spent on Trade Mitigation orders for the respective program and program year. Trade Mitigation orders do not deduct from entitlement balance. This field is for tracking purposes.
Trade Order Total	0	Total weight (in pounds) for the commodities that have been ordered by the user's organization for Trade Mitigation.



(Note) Click 🔽 (the Filter icon) to enter criteria to filter the report output.

Click ⁽²⁾ (the **Settings** icon) to change the appearance of the report. This includes changing the colors of the report, and which columns are displayed or hidden. The customized view may be names and saved for future use.

7. The transaction is complete.



RESULT

The user has accessed and reviewed the entitlement balances from the catalog. If applicable, the user may have customized the report output and/or has exported their entitlement balance to a spreadsheet or as a PDF file.



PROCESS OVERVIEW

Purpose

The purpose of this transaction is to display an FNS complaint in WBSCM. FNS complaints are created by State Distribution Agencies (SDAs) and Indian Tribal Organizations (ITOs) or by an FNS Complaint Specialist on behalf of an SDA/ITO regarding the quality of a USDA commodity.

Users may search for a complaint based on any of the following:

- The organization that created it
- The date it was created
- The commodities on the complaint
- The complaint number

Process Trigger

Use this transaction to display an FNS complaint for review and analysis.

Prerequisites

FNS complaint must exist in WBSCM.

Portal Path

Follow the Portal path below to complete this transaction:

• Select Operations tab → Complaint Administration tab → Create/Display FNS Complaints link to go to the Create/Display FNS Complaints screen.

Tips and Tricks

- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
 - Required (R) a mandatory field necessary to complete the transaction
 - o Optional (O) a non-mandatory field not required to complete the transaction
 - Conditional (C) a field that may be required if certain conditions are met, typically linked to completion of a mandatory field
- Refer to the WBSCM Help site, *Frequently Referenced Training Materials* section for basic navigation training and tips on creating favorites, performing searches, etc.



PROCEDURE

1. Start the transaction using the following Portal path: Operations tab → Complaint Administration tab → Create/Display FNS Complaints link.

Image: Create/Display FNS Complaint Screen

Home Operations Adm	in Help		
Complaint Administration			
	Operations > Complaint Admin	istration > Create/Display FNS Complaints	Full Screen Options *
Create/Display FNS Complain	S Complaint/Order Searc	h	
	Transactions		
	Search Orders	Complaints	
	Order Type Domestic 3rd Party	To create a new complaint, search for the order or product you create the complaint for using the Order Search	u would like to
	Created By Myself	To search for a complaint, use the Complaint Search.	
	Please enter one of the two of below		
	Creation Date		
	ID Type Order Number		
	10		
	OR		
	Goods Receipt Date		
	Requested Delivery Date		
	ID Type Product Number	V	

2. Click (the **Hide Navigator** arrow) to minimize the Portal menu. Note that this can be done with any transaction in WBSCM.

Image: Create/Display FNS Complaints Screen

infratine we	dministration				
Operation	is > Complaint Admin	nistration >	Crea	ate/Display FNS Complaints Full Screen	Options
<u>Compla</u>	int/Order Search	h		4	
Transad	ctions				
Search For	Orders	¥		Complaints	
Order	Domestic 3rd Party	V	-	Companies	_
Constant	Bu Munalf			To create a new complaint, search for the order or product you would like to create the complaint for using the Order Search	
Cleated	ву музен			To search for a complaint, use the Complaint Search.	
Please ent below	ter one of the two op	tions			
Please ent below Creation Date ID Type ID	ter one of the two opi	tions V			
Please ant below Creation Date ID Type ID	ter one of the two epi Order Number	tions V			
Please ant below Creation Date ID Type ID Goods	ter one of the two epi Order Number	tions V			
Please ant below Creation Date ID Type ID Goods Receipt Date	order Number	tions V			
Please ant below Creation Date ID Type ID Goods Receipt Date Requested	ter one of the two opt Order Number OR	tions V			
Please ent below Creation Date ID Type ID Goods Receipt Date Requested Delivery Date	ter one of the two opt Order Number OR	tions V V			
Please ent below Creation Date ID Type ID Goods Receipt Date Requested Delivery Date D Type	ter one of the two epi Order Number OR	tions V V			



Click 🔛 (the Down arrow) in the Search For field. 3.

Image: Create/Display FNS Complaints Screen Home Operations Admin Help Complaint Administration Operations > Complaint Administration > Create/Display FNS Complaint Full Screen Options Complaint/Order Search Transactions Complaints Orders Search For Complaints ~ Order Type Domestic 3rd Party V To create a new complaint, search for the order or product you would like to create the complaint for using the Order Search Created By Myself ~ To search for a complaint, use the Complaint Search. Please enter one of the two options below Creation Date ~ ID Type Order Number V ID OR Goods Receipt Date Request Delivery Date × v ery ID Type Product Number ¥ ~ ID

Select Complaints (the Complaints option). 4.



(Note) This drop-down list contains two options:

- Complaints is used to search for and display existing complaints. ٠
- Orders is used when creating a new complaint. Refer to the Create FNS Complaint • work instruction for additional information.



unerations :	Complain	Admin	Istration	Recall Administration	Coll Courses O
operatoria	S Compraint Adri	unistratio	n s Crea	aterDisplay Fits Complaints	Full Screen O
Complaint	Order Sear	ch			
complaint	gorder sear	<u>cn</u>			
Transactio	anis i				
Search For	Complaints		~	a second second	
Created	By Myself		~	Complaints	
Creation Date	Since Yesterday		V	To create a new compleint, search for the order or product you would like to	
ID Type	Complaint Num	ber	~	To search for a complaint, use the Complaint Search.	
ID			_	to search to to the second second second	
		11	_		
			Go		
			and the second		

5. As required, complete/review the following fields:

Field	R/O/C	Description
Created	0	The organization that created the document.
		Example: By All Business Partners
		(Note) The Created field is populated with the organization that created the complaint document.
		(Note) The options available under the Created drop-down list depend on the user's organization.
		FNS Complaints Specialists have the following options:
		 By All Business Partners is used to display all complaints by all business partners. By Specific Business Partner may be used to select complaints for a specific SDA/ITO when the business partner is known. Enter the number in the text field after selecting this option.



Field	R/O/C	Description
		All other users can access only the following option:
		By Myself is used to display only complaints created by the user's organization. FNS Complaints Specialists cannot use this option because all complaints, even those entered by FNS, are associated with a customer organization.
Creation Date	0	Date or range of dates the document was created.
		Example: Last 12 Months
		(Note) To search for a complaint created more than a year ago, select In Period to enter a date range in the provided fields.
ID Type	0	The criterion used to locate a document.
		Example: Complaint Number
		 (Note) For FNS complaints, ID Type options are: Complaint Number Complaint Material
ID	0	Number associated with the Sales Order, Multi- Food Order, or Complaint
		Example: 5003366
		(Note) If the ID field is left blank, all complaints that satisfy the criteria are displayed.



Operations > Complaint Administratio	stration Recall Administration	Full Screen O
Transactions Search For Complaints Created By All Business Partners Creation Date Last: 12 Months ID Type Complaint Number ID \$2003366	Complaints To create a new complaint, asserth for the order or product you would like to create the complaint for using the Order Search To search for a complaint, use the Complaint Search.	

6. Click Go (the Go button) to execute the search.

Image: Create/Display FNS Complaints Screen

Operations >	Complaint /	Administra	ation > Cre	ate/Display FNS Complaints Display FNS Complaints	ptions
Complaint	/Order Se	arch			
Transactio	ns				
Search For	Complaints		~	Complaints	
Created	By All Busine	ess Partne	irs 🗸	To create a pay correlated, search for the order or product you yould like to	-
Creation Date	Last 12 Mon	ths	~	create the complaint for using the Order Search	
ID Type	Complaint N	umber	~	To search for a complaint, use the Complaint Search.	
ID	5003366		_		
			Go		
Document Fou	hur				
Status • Date	Transaction	Partner	You Refere		
Completed					
06 (07 (3010	5003366	4000578	500034		
06/07/2018					



- 7. Select the Complaint Number to display from the *Search* panel. In this example, 5003366 (the 5003366 link) is selected.
- 8. Perform one of the following:

lf	Then	
The user does not need to select additional search criteria	1. 2.	Click (the Hide Complaint/Order Search arrow) to minimize the <i>Search</i> panel. Go to Step 9.

The user may still need to view the search criteria Go to Step 9.

Image: Create/Display FNS Complaints Screen

er Processing	Complaint Ad	ministration	Recall Administration		
Operations >	Complaint Administ	ration > Crea	ate/Display FNS Complaints	Full S	creen Options
Complaint	/Order Search				
_					
Transactio	ns		Complaint: 500336	6 from 06/07/2018 17:24	^
Search For	Complaints	~	Order Number: 5	000349540	
Created	By All Business Parti	ners ¥	Your Description:	13825_QAS_DSL_PRE5	
Creation Date	Last 12 Months	Y	Incident Date:	(MM/DD/VVV)	
ID Type	Complaint Number	×	Date Received:	(MM/DD/YYYY)	
D	5003366		Complainant Names S	IDA Complaint Specialist	
		Go	Complainant Title:		
			Complainant Phone:		
Document Fo	und		Complainant Fax:		
Status			Complainant Email: V	ibscm_tul2@sra.com	
	Transaction Partne	r <u>You</u> Refere	Contact Name:	13825_QAS_DSL_PRE3	
▼ <u>Date</u> Completed			Contact Organization:	13825_QAS_DSL_PRE5	
	5003366 400057	<u>9</u> 500034	Contact Phone:		
06/07/2018			Contact Email:	13825_QAS_DSL_PRE5	
			Additional Order Data		
			History:		
			Street Address of Remaining Product:	13825_QAS_DSPRES STREET, HOUSTON, TX	
				RetBlarset Codbad	
			Resolution Code:	Enadement Gregoria	
			Resolution Code:	tion	

9. As required, complete/review the following fields:

Field	R/O/C	Description
Your Description:	0	A free text field describing the order or complaint issue.
Incident Date:	0	The date when the incident was first identified.



Field	R/O/C	Description
Date Received:	0	The date the materials were received.
Contact Name:	0	The name of the contact.
Contact Organization:	0	The organization of the contact.
Contact Phone:	0	The phone number of the contact.
Contact Email:	0	The email address of the contact.
Additional Remarks:	0	Additional comments about the complaint that are visible only to FNS.
Street Address of Remaining Product:	0	The street address where remaining product is located.
Resolution Code:	0	The manner in which the issue was resolved. (Note) Refer to the <u>Complaint Statuses</u> and <u>Resolution Codes</u> Job Aid for additional information.
Complaint Type:	0	The type of complaint.



Field	R/O/C	Description
Status	0	 The code for status of the document. (Note) Some codes include the agencies and teams involved: FNS Complaints Team (CT) FNS Food Safety Team (FST) Agricultural Marketing Service (AMS) Food Safety and Inspection Services (FSIS) Food and Drug Administration (FDA)
		Refer to the <u>Complaint Statuses and</u> <u>Resolution Codes</u> Job Aid for additional information.

er Processing	Comple	iint Admi	nistration	Recall Administration		
Operations >	Complaint A	Administrat	on > Cre	ate/Display FNS Complaints		Full Screen Option
Complaint	/Order Se	arch				
Transaction	ns			Complaint: 500336	from 06/07/2018 17:24	
Search For	Complaints			Order Number: 5	0349540	
Created	By All Busine	ess Partner		Your Description:	325_QAS_DSL_PRE5	
Creation Date	Last 12 Mon	ths	~	Incident Date:	(MM/DD/YYYY)	
ID Type	Complaint N	umber	~	Date Received:	(MM/DD/YYYY)	
ID	5003366			Completent linear S	Complaint Enertalist	
			Go	Complainant Name: 2 Complainant Title:	Company Specialist	
				Complainant Phone:		
1 Document Fou	ind			Complainant Fax:		
Status				Complainant Email: V	.cm_ful2@sra.com	
Diatus	Transaction	Partner	You	Contract Names	PIS OAC DCL DES	
▼ <u>Date</u>			Kerere	Contact Ornanization:	825 OAS DSL PRES	
Completed	5003366	4000578	500034	Contact Phone:		
06/07/2018				Contact Email:	325 QAS DSL PRES	
				Additional Order Data		
				History:		
				Street Address of Remaining Product:	13825_QAS_DSL_PRE5 STREET, HOUSTON, TX	
				Resolution Code:	Entitlement Credited	
				Recommended Solu		
				Solution Notes Histor	FNS Compleint Specialist (06/11/2018 at 5:18 PM Central) :	

10. Click \checkmark (the **Down** arrow) to scroll to the bottom of the screen to view the entire order.

(Note) The Search panel has been collapsed to display complaint details in full screen.



omplain	t/Order	Search									_
Additional	l Order Da	ta									
History	yı.										
Street Remai	Address of ning Produc	cti i	13825_QA5_C	SL_PRE5 STREET, HOUSTON, TX				0			
Resolu	ition Code:	[1	Entitlement G	edited 💙							
Recon	vmondod !	Solution									
Recon	nmenoeo	5010000									
Solutio	on Notes Hi	story:	FN: Sol	S Complaint Specialist [06/11/2018 at 5:18 ution notes to be entered by FNS	PM Central) :						
Comebiet '	Turney CT-1	Pataraartio		101							
	type: Ci-	ve mspecuoi									
Complaint										and the second se	
Complaint	Item	Product	Quantity	Description	Program		Status		Quantity Affected	Quantity kemaining	
	Item 1000	Product 100449	Quantity 10.000 CS	Description CEREAL CORN FLKS 1080 PKG-12/18 OZ	Program	Closed	Status	V	Quantity Affected	1200.000	
Pre	Item 1000 eceding Doc	Product 100449 current:	Quantity 10.000 CS Ord	Description CEREAL CORN FLKS 1080 PKG-12/18 OZ er 5000349540 / 100	Program	Closed	Status	V	Quantity Affected	1200.000	
Pre	Item 1000 eceding Doc	Product 100449 currient:	Quantity 10.000 CS Ord	Description CEREAL CORN FLKS 1080 PKG-12/18 OZ er 5000349540 / 100	Program TEFAP	Closed	Status	~	Quantity Affected	Quantity Remaining	
Pre Status H	Item 1000 eceding Doo	Product 100449 currient:	Quantity 10.000 CS Ord	Description CEREAL CORN FLKS 1080 PKG-12/18 OZ er 5000349540 / 100	Program TEFAP	Closed	Status	V	Quantity Affected	Quantity kenalining 1200.000	
Pre Status H SDA Com	Item 1000 eceding Doc distory	Product 100449 currient:	Quantity 10.000 CS Ord 06-07 17:24:5	Description CEREAL CORN FLKS 1080 PKG-12/18 OZ ler 5000349540 / 100 87 : Draft	Program	Closed	Status	V	Quantity Affected	Quantity kenaliting	
Status H SDA Com , 2018-06	Item 1000 ecceding Doc distory plaint Spec plaint Spec 5-07 17:46:	Product 100449 current: calist, 2018- cialist, 2018- 59 : CT-Revi	Quantity 10.000 CS Ord 06-07 17:24: 06-07 17:41:4 ew	Description CEREAL CORN FLKS 1080 PKG-12/18 OZ ler 5000349540 / 100 47 : Draft 13 : Submit	Program TEFAP	Closed	Status		Quantity Affected	Quantity Kemaning	
Status H SDA Com SDA Com , 2018-06 FNS Com	Item 1000 ecceding Doc distory plaint Spec 5-07 17:46: plaint Spec	Product 100449 sument: talist, 2018-6 59 : CT-Revi ielist, 2018-0	Quantity 10.000 CS Ord 06-07 17:24: 06-07 17:41:4 ew 06-01 17:18:2	Description CEREAL CORN FLKS 1080 PKG-12/18 OZ ler 5000349540 / 100 47 : Draft 13 : Submit 15 : Closed	Program TEFAP	Closed	Status		Quantity Affected	Quantity Kemaining	
Status H SDA Com , 2018-06 FNS Com	Item 1000 eceding Doc distory plaint Spec 5-07 17:46: plaint Spec	Product 100449 current: calist, 2018-0 cialist, 2018-0 cialist, 2018-0	Quantity 10.000 CS 0rd 0rd 06-07 17:24:: 06-07 17:41:4 ew 16-11 17:18:2	Description CEREAL CORN FLKS 1080 PKG-12/18 OZ ler 5000349540 / 100 47 : Draft 13 : Submit 25 : Closed	Program TEFAP	Closed	Status	V	Quantity Affected	Quantity Kemaining	

11. Click **Continue** (the **Continue** button) to review details of the complaint, such as specific problem(s) previously entered and Food Safety Survey responses.



(Note) Once submitted, previously entered data will be displayed in gray. Previously submitted complaints can be edited only by an FNS Complaints Specialist.



r Processing	Complaint Administration Re	call Administration		
ations > Compla	eint Administration > Create/Display FNS Co	mplaints		Full Screen Opt
Complaint:	In Process			
Please selec	ct all that apply from one or more of	the problem categories described below	w:	
Quality				
Product:				
	Taste/Odor Appearar	nce/Color	Defects	
	Mold Excess lin	quid by volume (canned products)		
	Other			
1.1				
Foreign				
in				
Product:				
	Bones	Metal/Machines Parts	Stems, Leaves, etc.	
	Insects/Insect parts	Glass	Plastic/Rubber	
	Rock			
	* If a foreign material in product has been id Object Dimension	entified, then you must input the object's dimensi	lon	
	C Other			
Packaging				
Condition:	The second second becaused over			
	Cans dented beyond use	Corrosion in cans	Bulging cans	
		Bags tear/pin holes	Not properly sealed	
	Leaking cans			

12. If necessary, click (the **Down** arrow) on the vertical scrollbar to review additional fields.

Image: Create/Display FNS Complaints Screen

r Processing	Complaint Administration Rec	all Administration		
ations > Complain	nt Administration > Create/Display FNS Con	oplainte		Full Screen Option
Cooking or Preparation Issue:	Wrong color when cooked Undercooked	Product does not perform well	Excess breading	
Commodity caused:	Allergic Reaction	Illness	Injury	
	Cther			
Pallet Issue:	Poor quality pallets at delivery Other	Pallets lacking sufficient shrink wrap to s	secure load	
Delivery Issue:	-			
	Carrier no appointment	Driver performance	e	
Damage Issue:	Damages found during unload process	Facility damages from car	mer truck;trailer	



13. If necessary, click 💌 (the Down arrow) on the vertical scrollbar to review additional fields.



Image: Create/Display FNS Complaints Screen

14. Click Back button) to return to the previous screen.



Additiona	al Order Dat	a							
Histor	nya								
Street Address of Remaining Scoduct:		1	13825_QAS_DEL_PRE5 STREET, HOUSTON, TX						
Resol	Resolution Code:		Entitlement Credited						
-									
Reco	mmended 3	olution							
Soluti	ion Notes His	tory:	FNS Sol	Complaint Specialist [06/11/2018 at 5:18 ution notes to be entered by FNS	3 PM Central) :				
Complaint	Type: CT-F	le-Inspection	i	¥					
	Itom	Descluct	Quantity	Description	Decembra	0	tatur	Quantity Affected	Quantity Remaining
	1000	100449	10.000 CS	CEREAL CORN FLKS 1080 PKG-12/18 0Z	TEFAP	Closed	ি	1200,000	1700.000
Pr	eceding Doc	ument:	Ord	er 5000349540 / 100		1			
Status	History								
SDA Con	nplaint Speci	alist, 2018-0	6-07 17:24:4	7 : Draft					
SDA Con	nplaint Speci 6-07 17:46:	alist, 2018-0 59 : CT-Revi	06-07 17:41:4 ew	13 : Submit					
1 2010-0		-li-t 2010-0	6-11 17:18:2	5 : Closed					

- **15.** Click **Close** (the **Close** button) to exit the transaction.
- **16.** The transaction is complete.



RESULT

The details of an FNS complaint have been successfully displayed.