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 *Display and Maintain User (Vendor)* work instruction.
- Refer to the *WBSCM User Administration* 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** link.

Image: Manage Users Screen
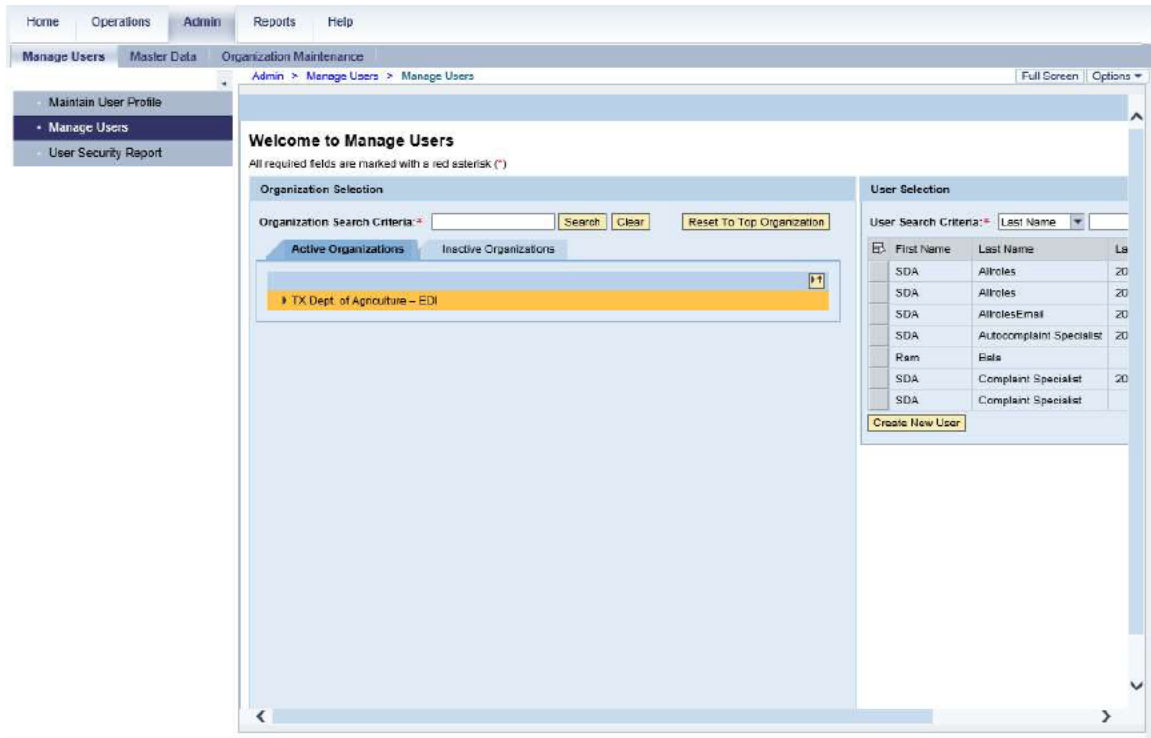
2. Click ◄ (the **Hide Navigator** arrow) to minimize the Portal menu. Note this can be done on any transaction in WBSCM.

> ℹ️ (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:

If	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.

Image: Manage Users Screen
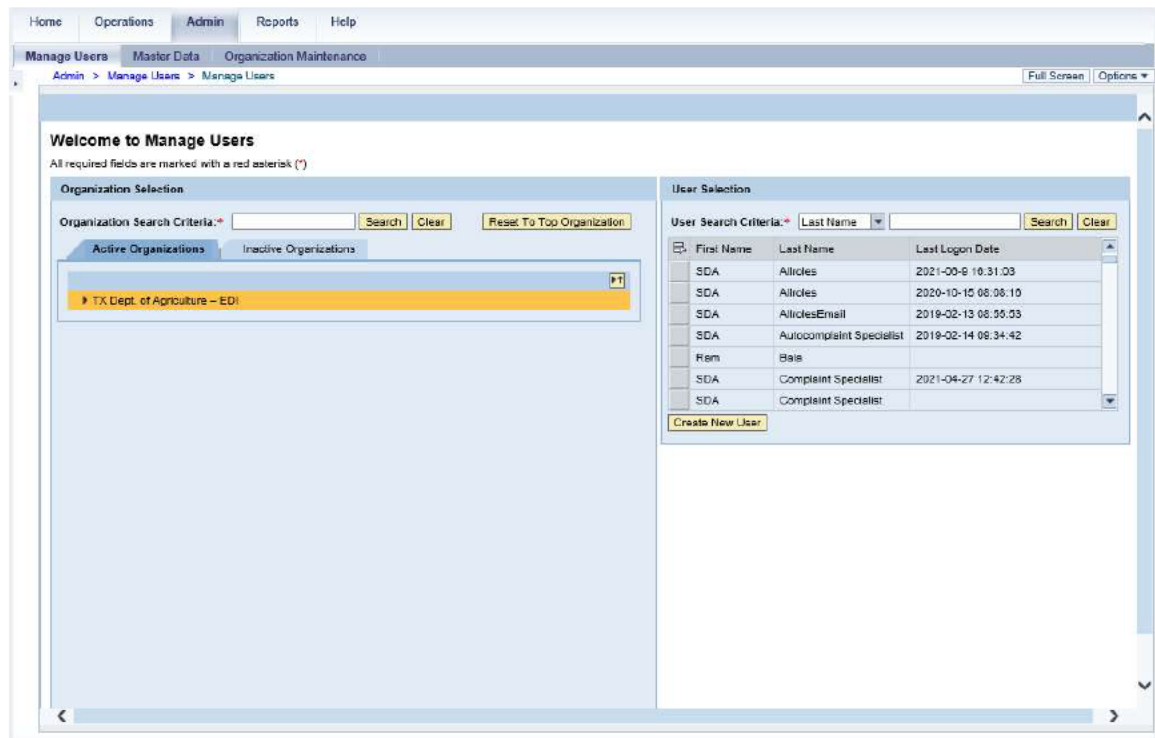
4. Click ▶ (the **Available Organizations** arrow) next to the tree item at the top of the *Organization Selection* panel.

5. Click the **Organization Search Criteria** field.

   (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

   (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 sub-organization 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 sub-organizations; therefore, both the **Active Organizations** and **Inactive Organizations** tabs are displayed.

Image: Manage Users Screen

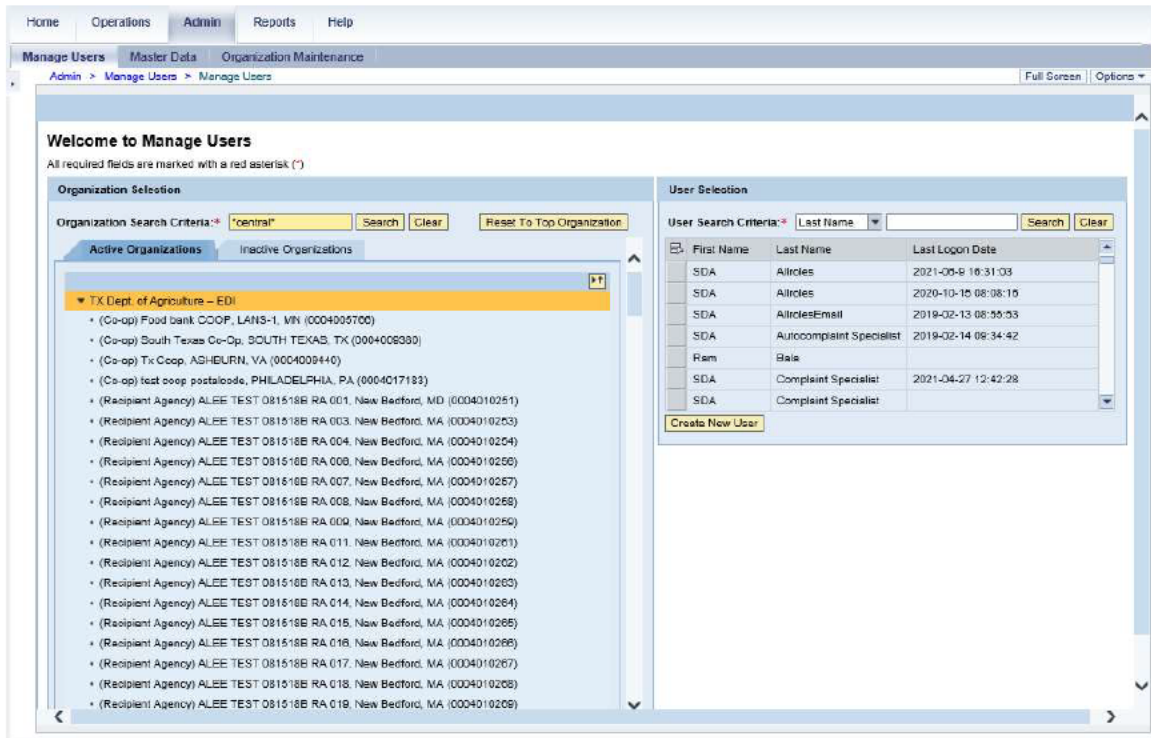6. As required, complete/review the following fields:

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 *Wildcard and Matchcode Searches* job aid for guidance on partial match searches.

Image: Manage Users Screen

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

Image: Manage Users Screen

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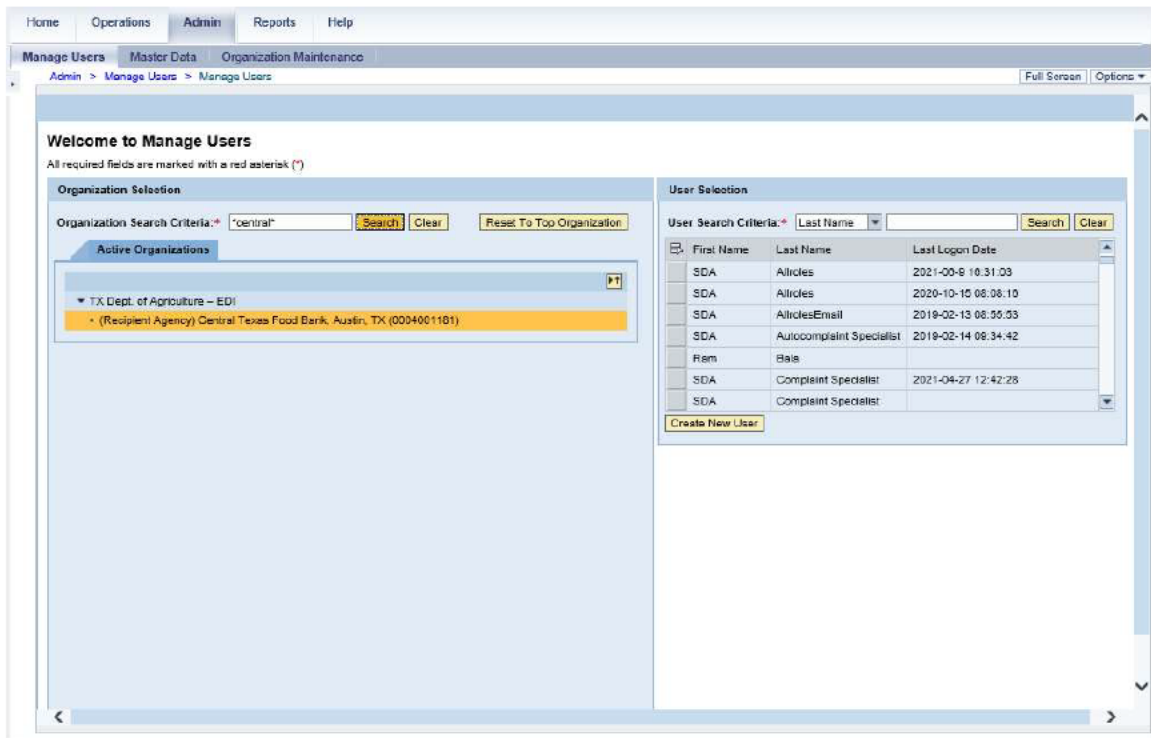
8. Select the appropriate sub-organization in the *Organization Selection* panel.

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

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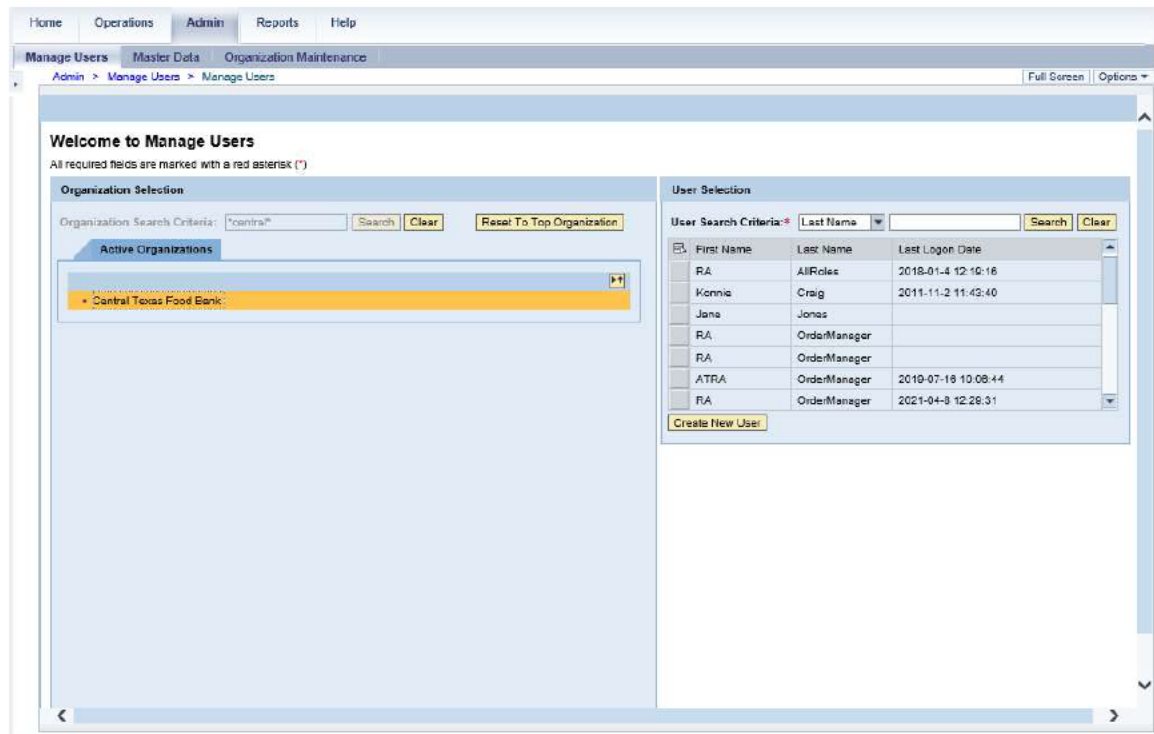
9. If necessary, click ⬛ (the **Drop-down** arrow) in the **User Search Criteria:** field to select the first name.

> 🛈 (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.
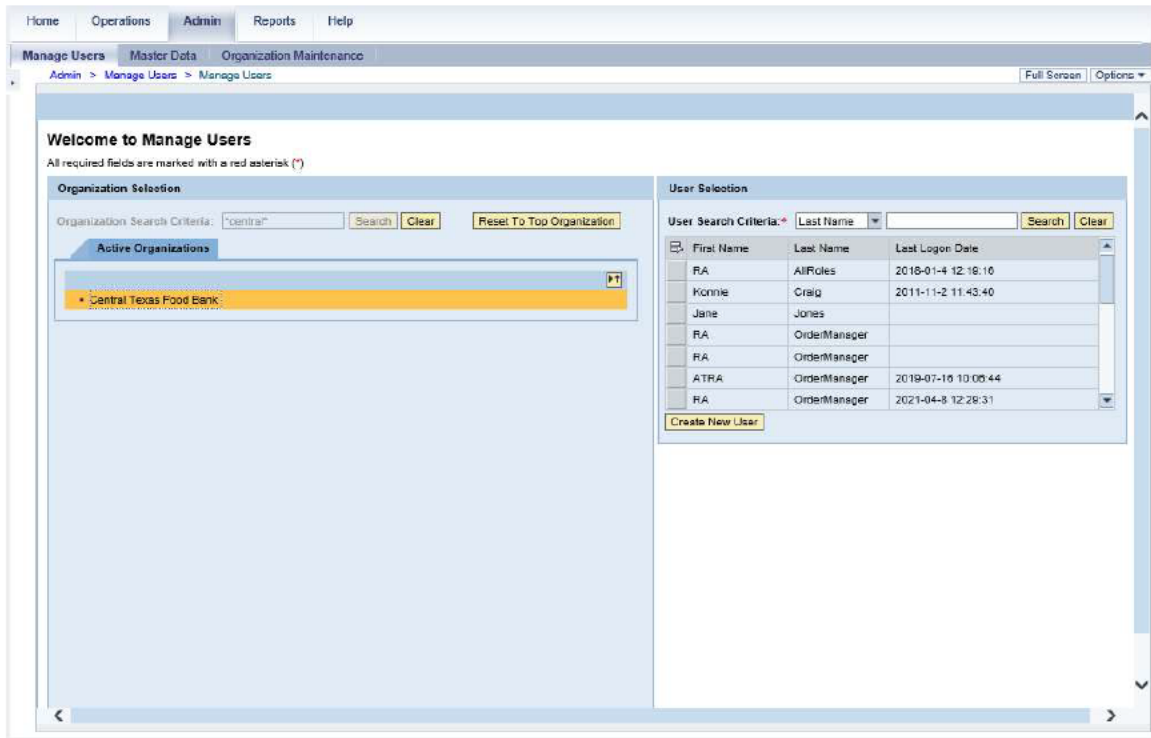
Image: Manage Users Screen
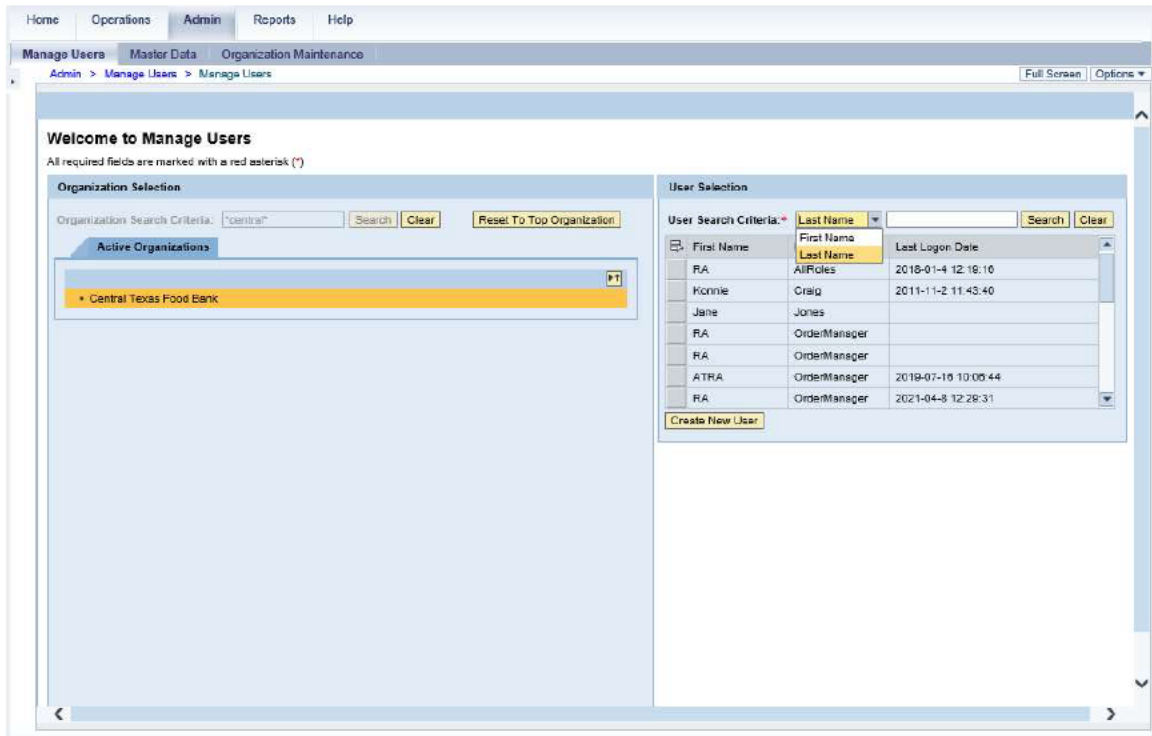
10. Perform one of the following:

If	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.

Image: Manage Users Screen

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:** smith (Note) Use the wildcard symbol to search part of the name. Refer to the *Wildcard and Matchcode Searches* job aid for guidance on partial match searches.

Image: Manage Users Screen
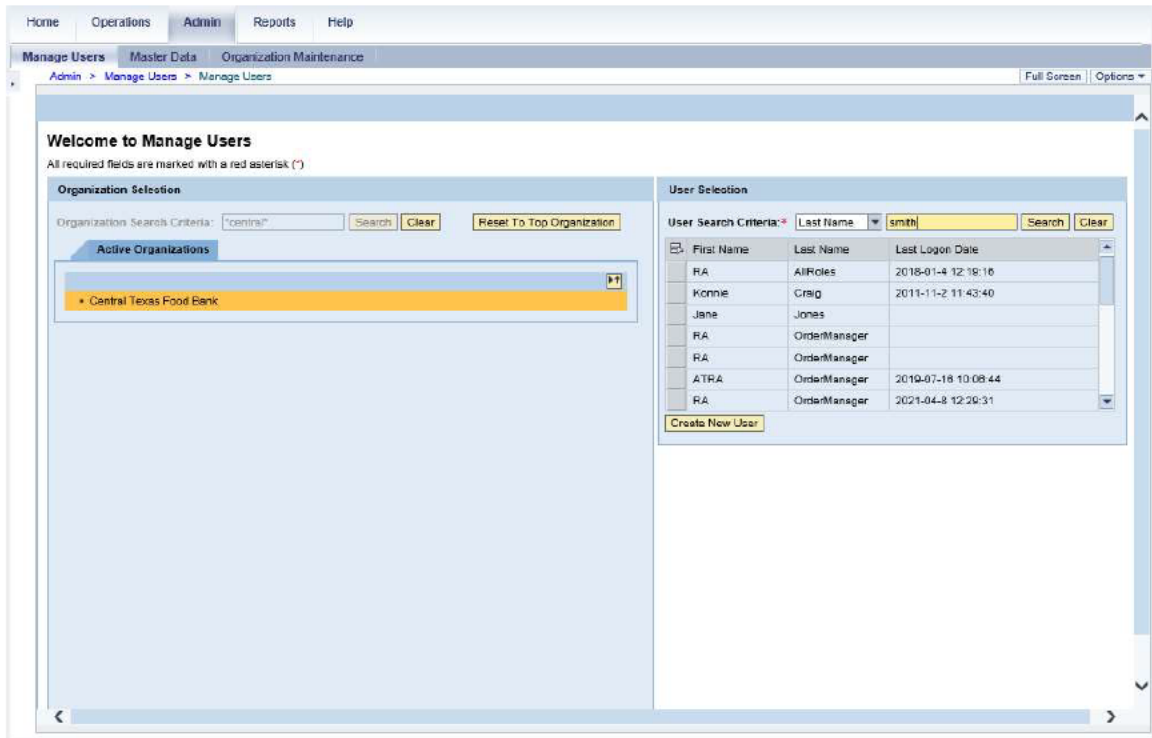
12. Click [Search] (the **Search** button) to generate a list of matching user profiles in WBSCM.

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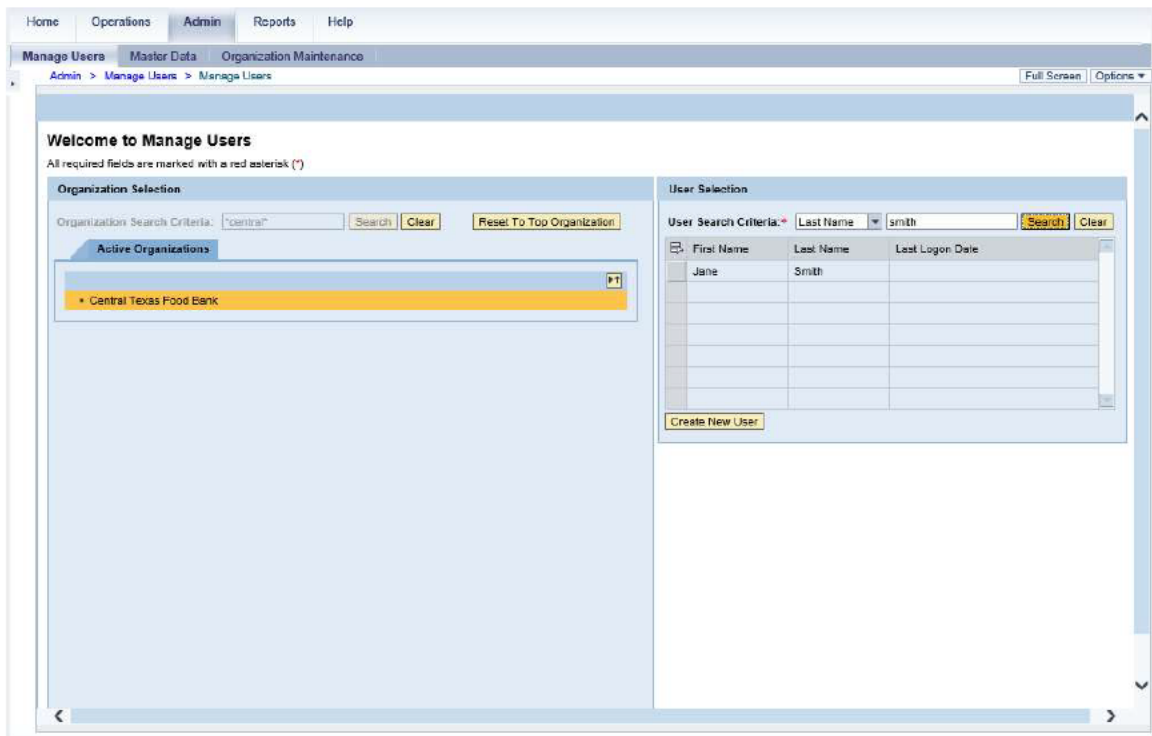
13. Click ☐ (the **Selection** button) next to the user to be modified. In this example, **Jane Smith** is selected.

ℹ️ (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

14. Perform one of the following:
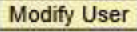
If	Then
Admin needs to review the user profile details without making changes	Go to Step 15.
Admin needs to make changes to the user's name, contact information, and/or security roles	1. Click Modify User (the **Modify User** button) to activate modify mode. 2. Go to Step 15.
Admin needs to perform other administrative actions on the selected user profile	Go to Step 20.

Image: Manage Users Screen

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

Field	R/O/C	Description
Title:	O	A heading used before a surname or full name. ![info] (Note) Use ▼ (the **Drop-down** arrow) in the field to select the title.
First Name:	O	First name of the user. **Example:** Jane
Last Name:	O	Last name of the user. **Example:** Smith
Email:	O	Email address for user or organization. **Example:** janesmith@email.com ![info] (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:	O	Fax number for the user or business partner.
Mobile Phone:	O	Cellular phone number where the user or organization can be reached.
Phone:	O	Phone number for a user or organization. **Example:** 555-555-1212
Street Address:	O	A free text field to enter the main street address of the user or organization. **Example:** 280 W Highway 30
City:	O	City where the user or company is located. **Example:** Austin
Zip Code:	O	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:	O	Country code that represents country name. **Example:** USA (Note) Use (the **Drop-down** arrow) in the field to select the country.

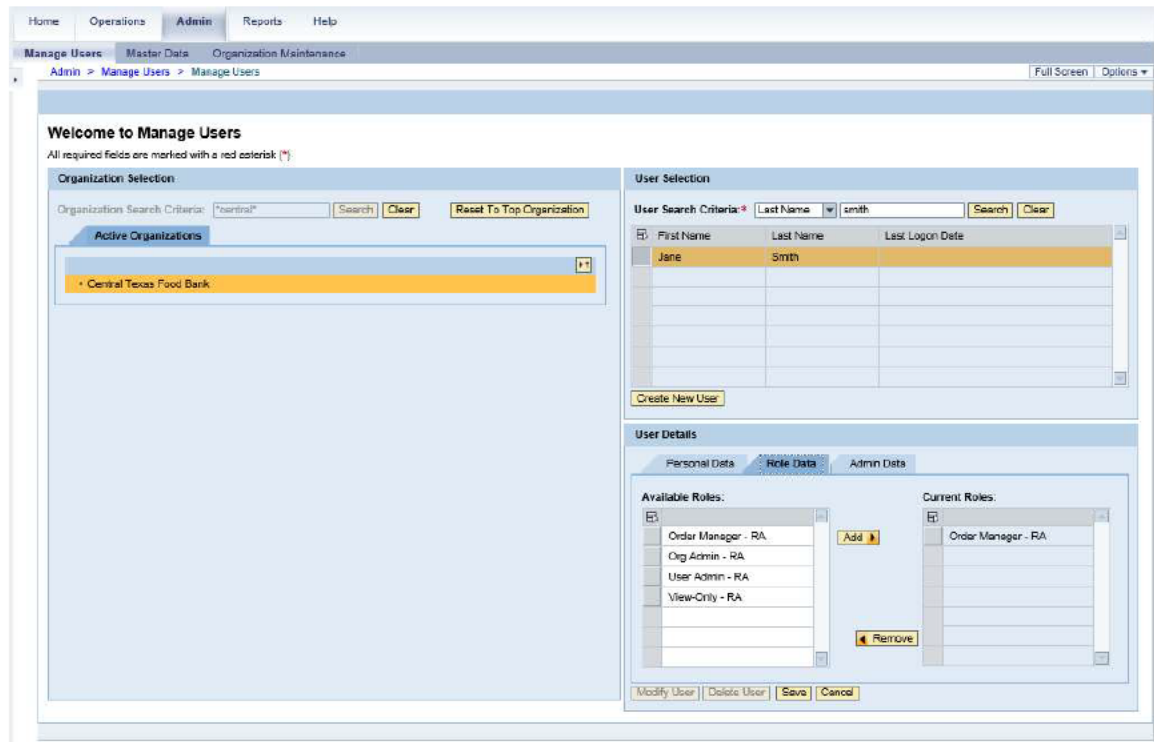| Field	R/O/C	Description
State Or Province:	O	State where the user or organization is located. **Example:** Texas (Note) Use ▼ (the **Drop-down** arrow) in the field to select the state or province.
Time Zone:	O	Standard time for a region throughout the world. **Example:** Central Time (Dallas) (Note)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

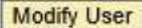(Note) The *Role Data* tab displays two columns that contain the following details:

- **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 *WBSCM Role Assignment Matrix* job aid for more information.
- **Current Roles** - All roles currently assigned to the new user.

Image: Manage Users Screen

17. Perform the following as needed:

If	Then
Admin needs to assign a role to the selected user	1. Click [ ] (the **Selection** button) next to the role in the *Available Roles* column. 2. Click **Add ▶** (the **Add** button) to assign the role to the user. ℹ (Note) Once assigned, the role will appear in the *Current Roles* column.
Admin needs to unassign a role from the selected user	1. Click [ ] (the **Selection** button) next to the role in the *Current Roles* column. 2. Click **Remove** (the **Remove** button) to unassign the role from the user. ℹ Once unassigned, the role will appear in the *Available Roles* column.
Admin has completed updates to *Role Data*	Go to Step 20.

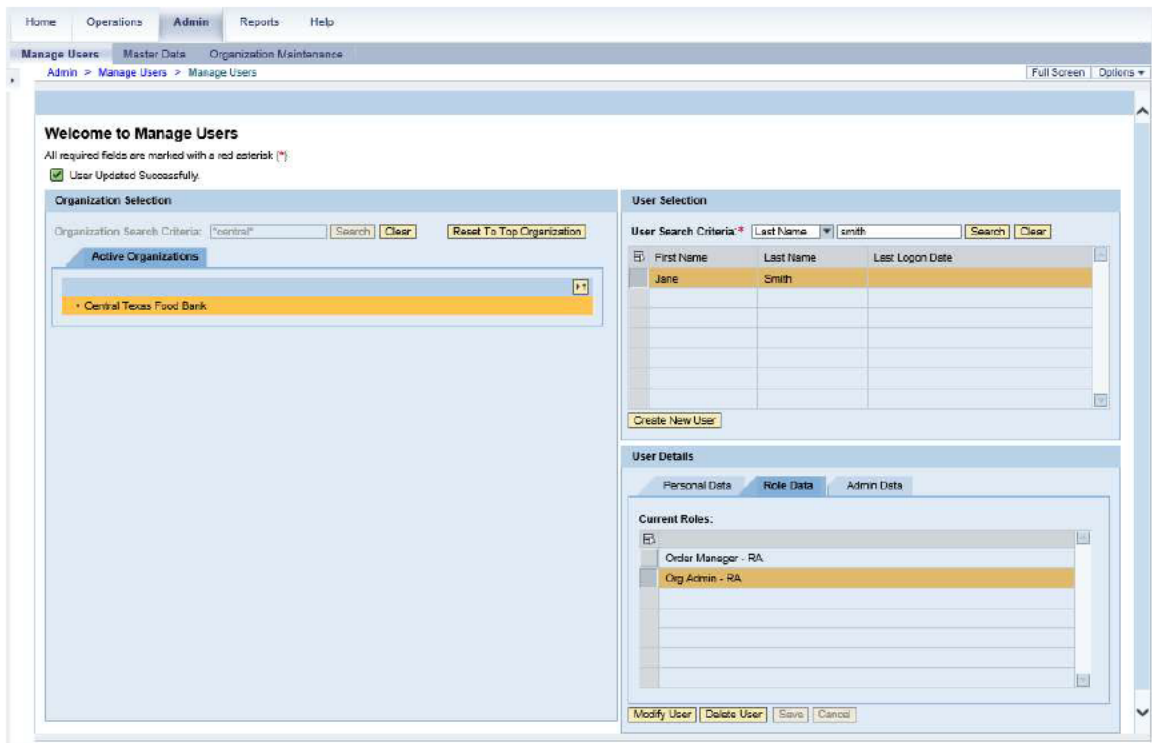ℹ (Note) If not already in modify mode, click **Modify User** (the **Modify User** button).

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

Image: Manage Users Screen

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

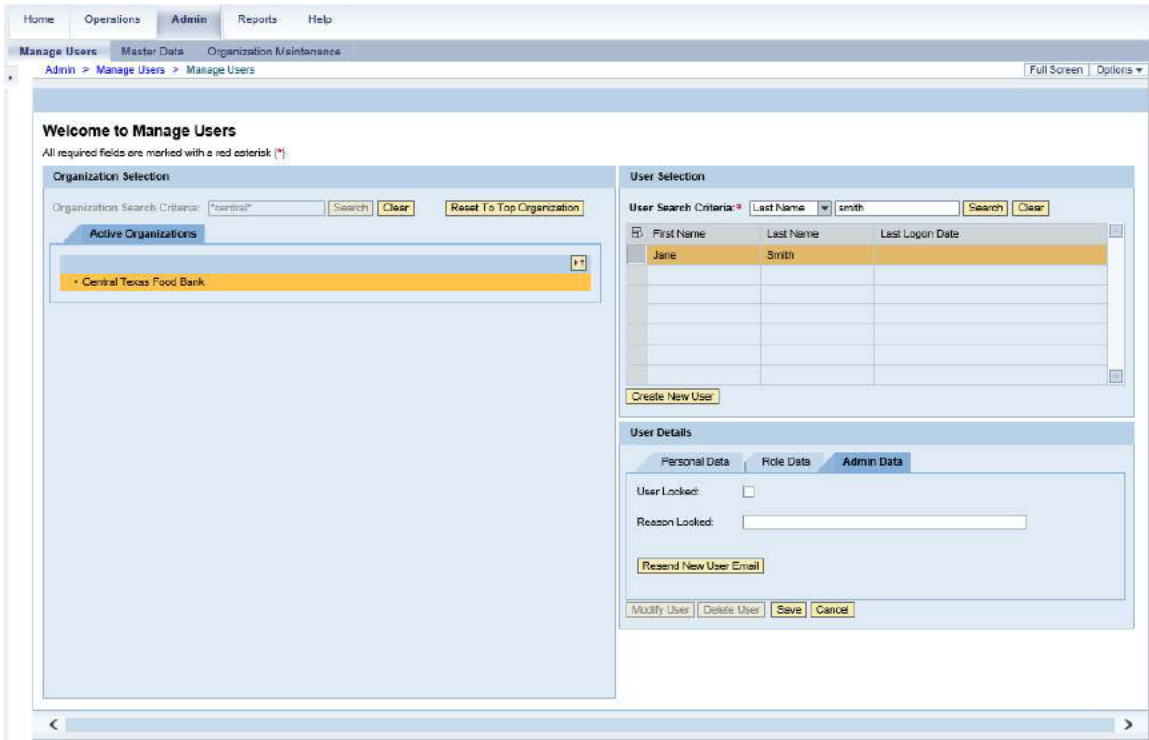   (Note) This button will only appear if modify mode was activated.

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

19. Perform one of the following:

If	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 Data (the **Admin Data** tab) to lock/unlock the user profile or resend WBSCM new user registration email instructions to the new user.
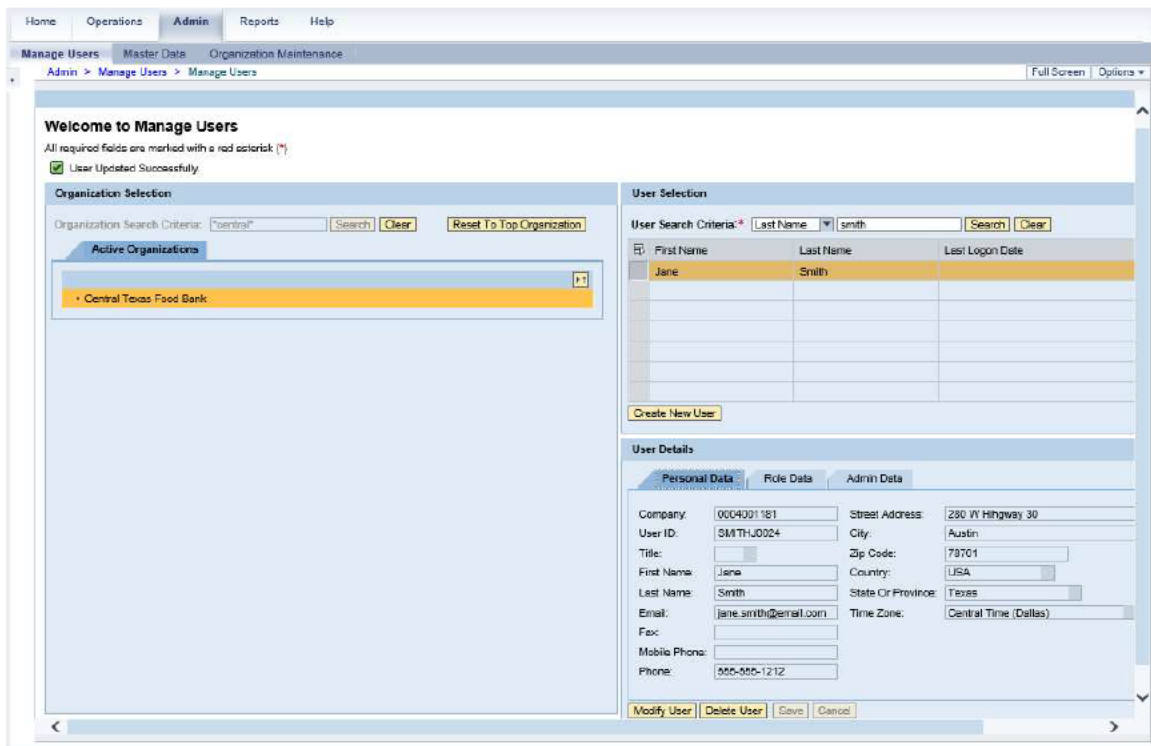
Image: Manage Users Screen

21. Perform any of the following:

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

| If	Then
	Reason Locked: field. 4. Click [Save] (the **Save** button) to save the changes.
Admin needs to unlock the user	1. Click [Modify User] (the **Modify User** button) to activate modify mode. 2. Click ☑ (the checked box) next to **User Locked**: to unlock the user profile, allowing the user to access WBSCM. 3. As applicable, provide information in the **Reason Locked**: field. 4. 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

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

   (i) (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.

Image: Confirm Delete User SMITHJ0024? Pop-Up
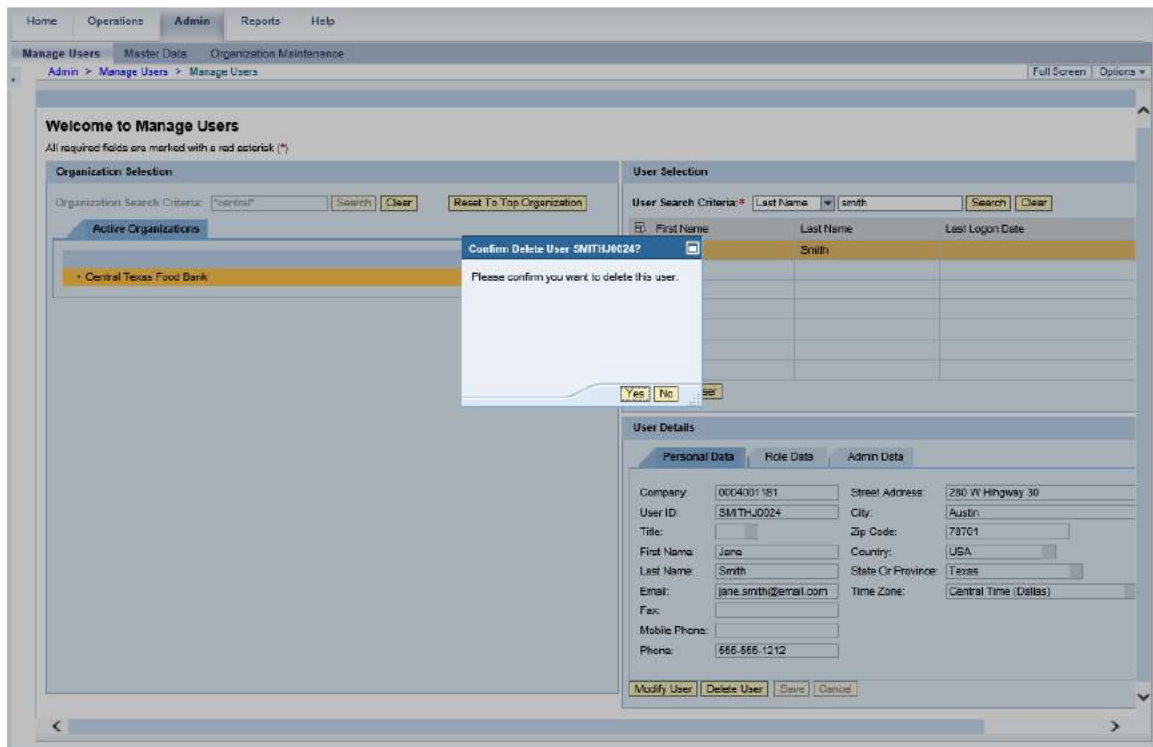
23. Click [Yes] (the **Yes** button) to confirm in the *Confirm Delete User* pop-up window.

(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 User Security Report 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**
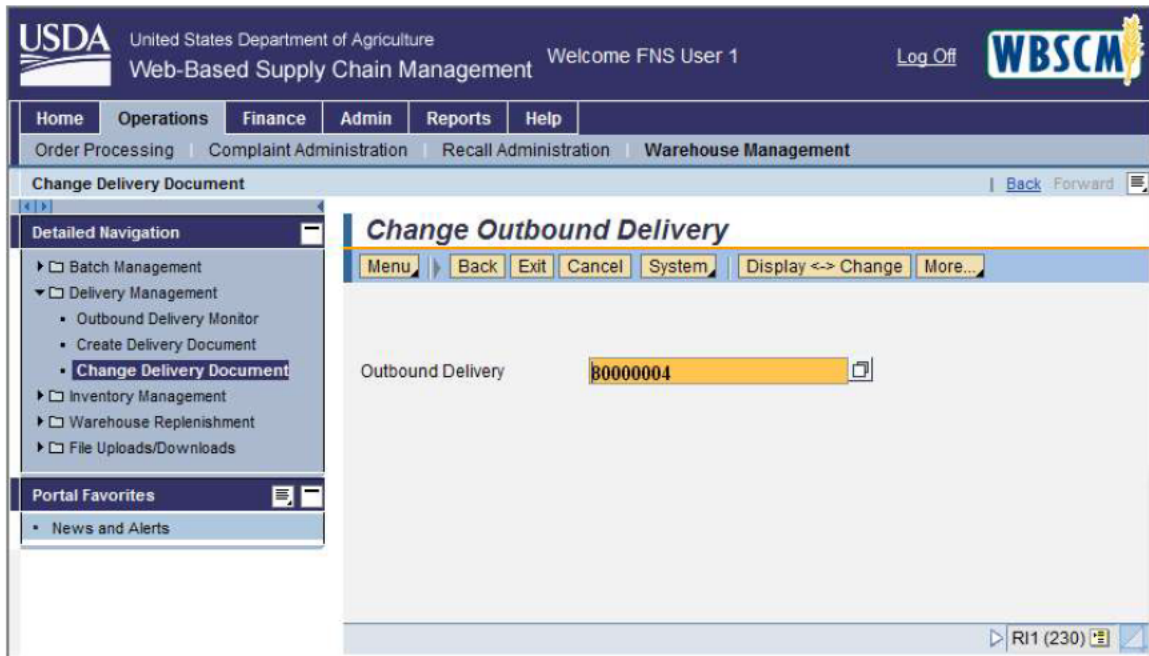
Change Outbound Delivery Screen
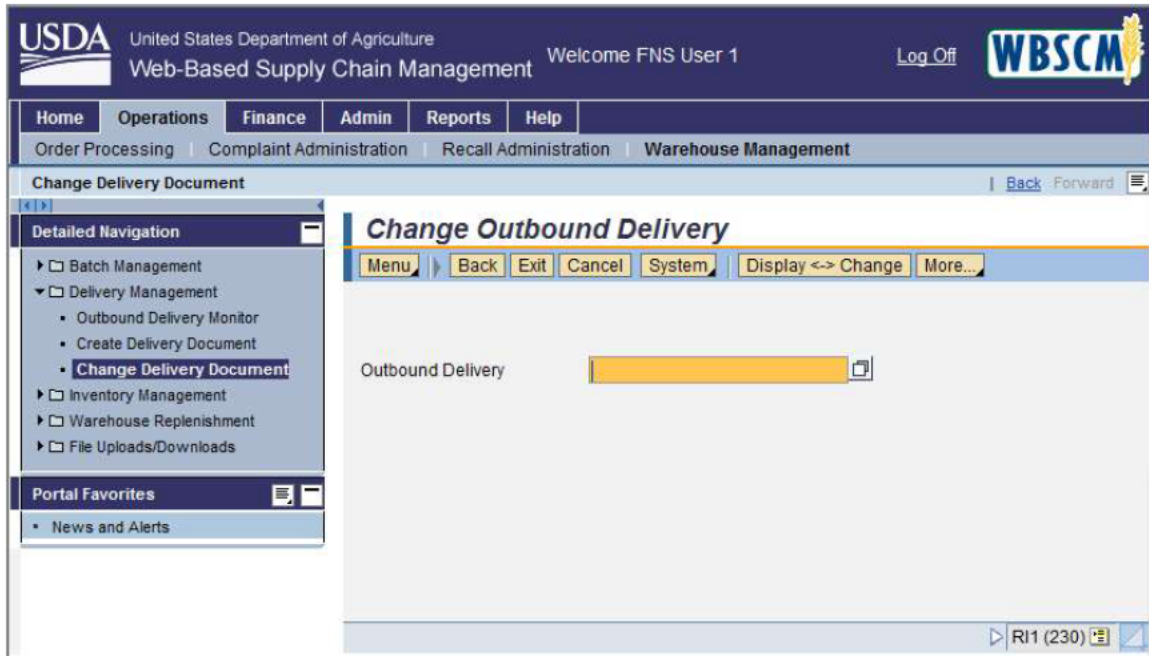

2. As required, complete/review the following fields:

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

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

Outbound Delivery 80000004 Change: Overview Screen
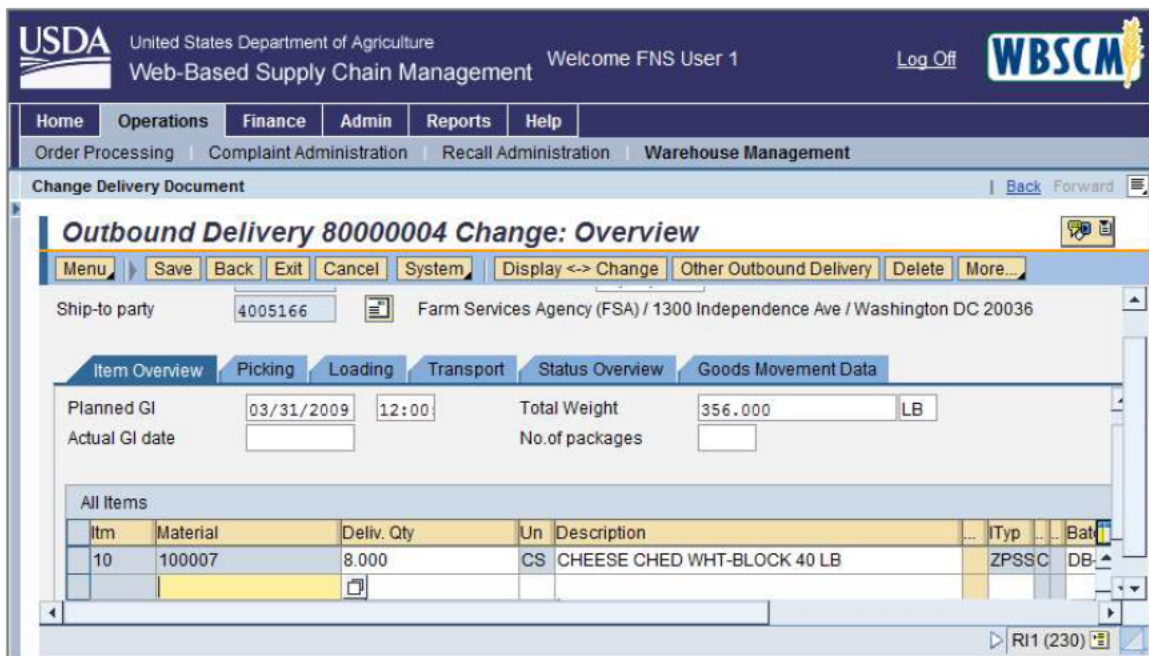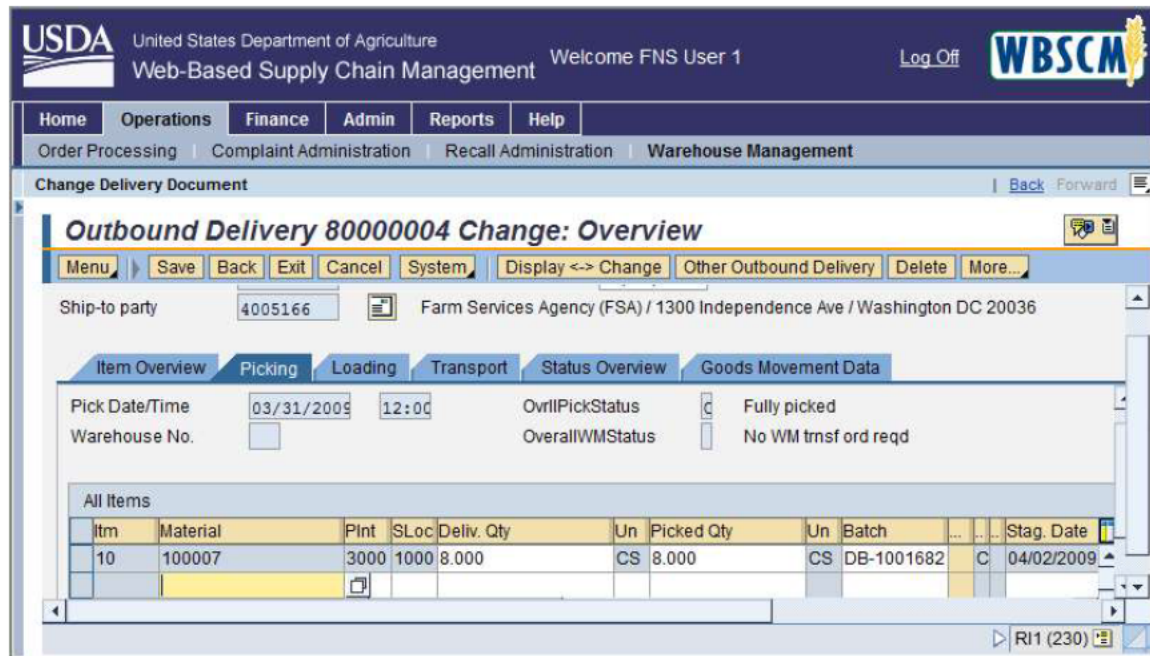
4. Click **Picking** (the **Picking** tab) to display picking details.

(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

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

(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.

WBSCM

Outbound Delivery 80000004 Change: Overview Screen

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

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

WBSCM

(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

USDA United States Department of Agriculture
Web-Based Supply Chain Management   Welcome FNS User 1   Log Off   **WBSCM**

| Home | Operations | Finance | Admin | Reports | Help |

Order Processing | Complaint Administration | Recall Administration | **Warehouse Management**

Change Delivery Document | Back Forward

Outbound Delivery 80000004 Change: Overview

| Menu | ▶ | Save | Back | Exit | Cancel | System | Display <-> Change | Other Outbound Delivery | Delete | More... |

Outbound deliv.   80000004   Document Date   04/02/2009
Ship-to party   4005166   Farm Services Agency (FSA) / 1300 Independence Ave / Washington DC 20036

| Item Overview | Picking | Loading | Transport | Status Overview | Goods Movement Data |

Overall Status - Delivery

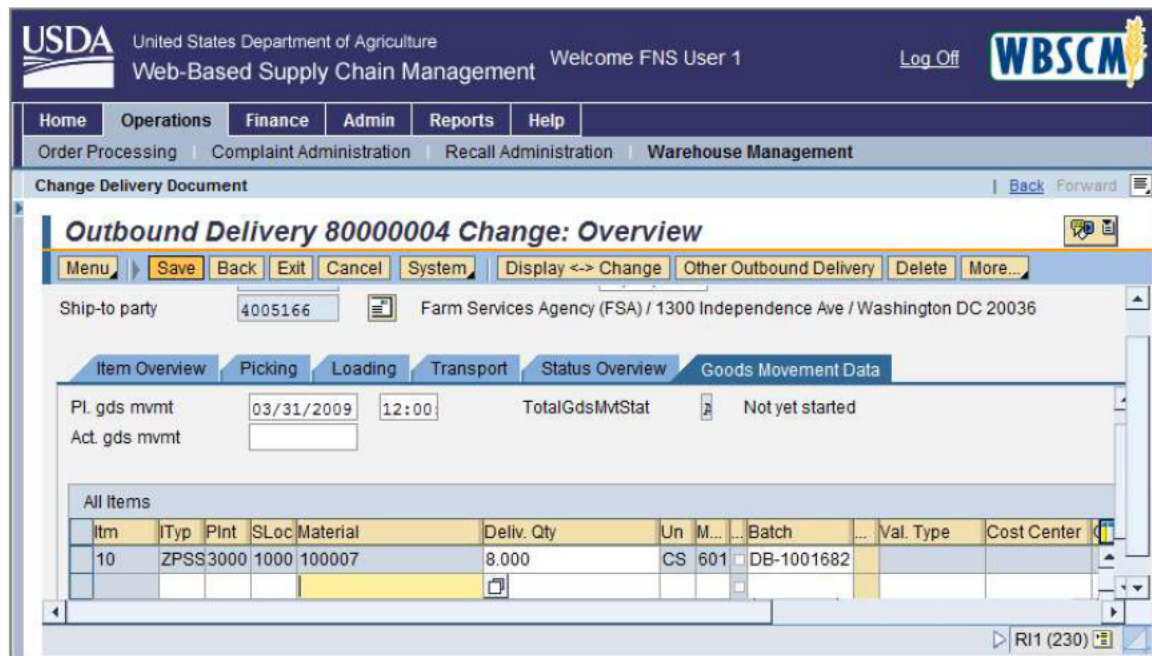| Delivery	OPS	PS	WM	C	GM	BS	Sta	TS	OvCS	POD ...
80000004	C			C	A					C

▷ RI1 (230)

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

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.

RESULT

The transaction has been successfully completed.

PROCESS OVERVIEW		Page 1 of 10

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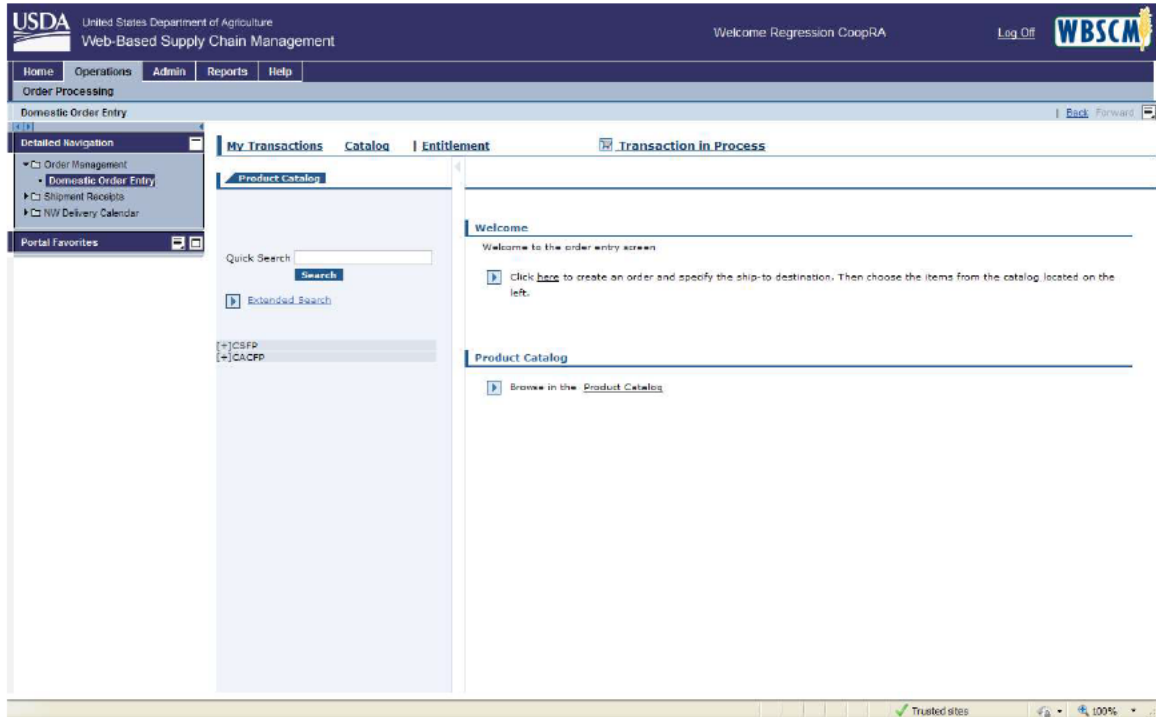
2. Click ◀ (the **Hide Navigator** button) to hide the Portal menu. Note that this can be done on almost any transaction in WBSCM - not just Order Management transactions.

Domestic Order Entry Screen
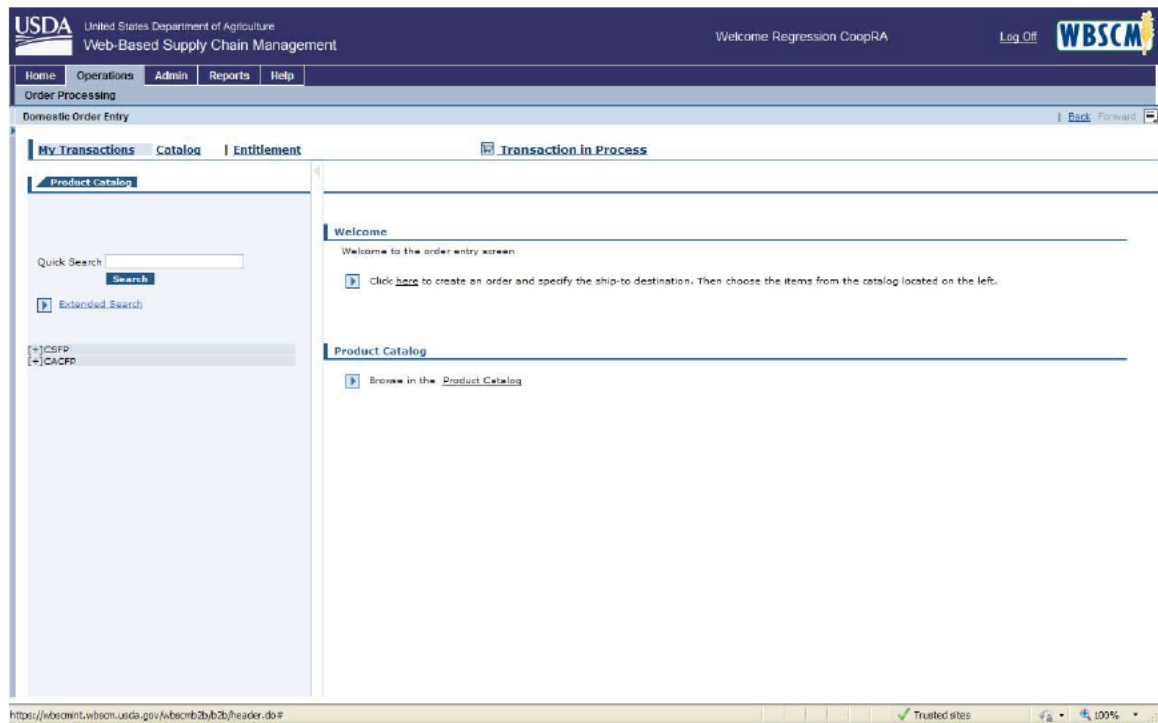
3.   Click **My Transactions** (the **My Transactions** link) to perform a search for existing transactions.

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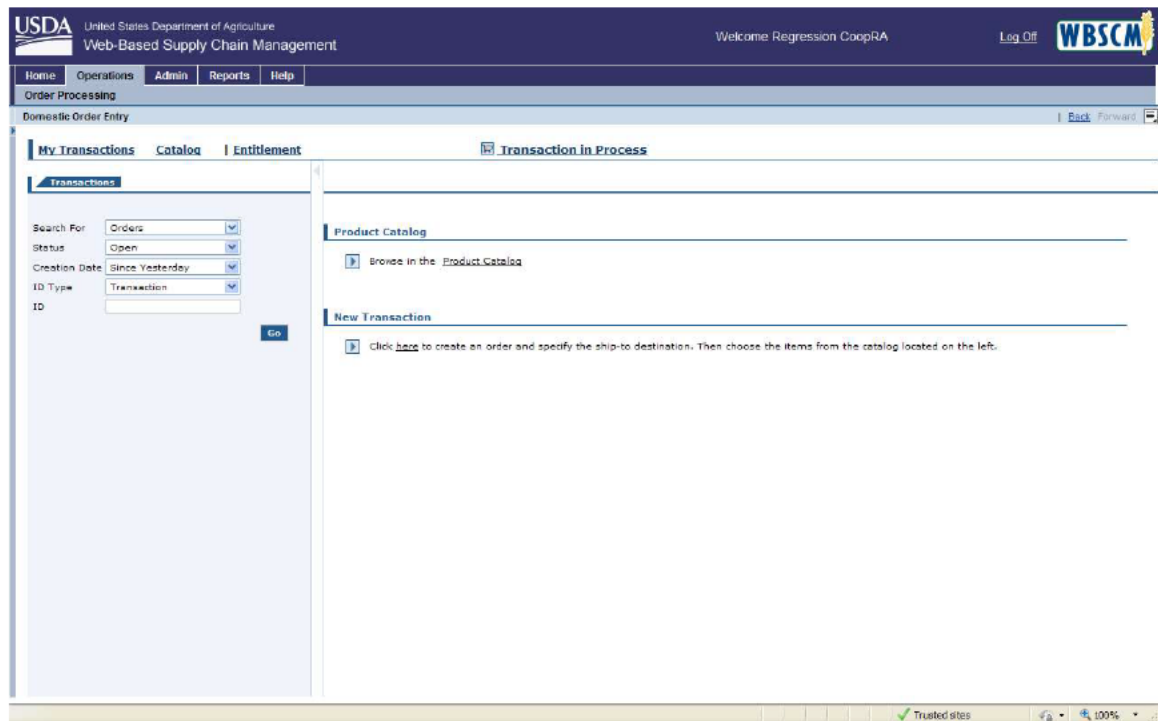
4. In the **Search For** field, click on the **Dropdown** button.

My Transactions Screen
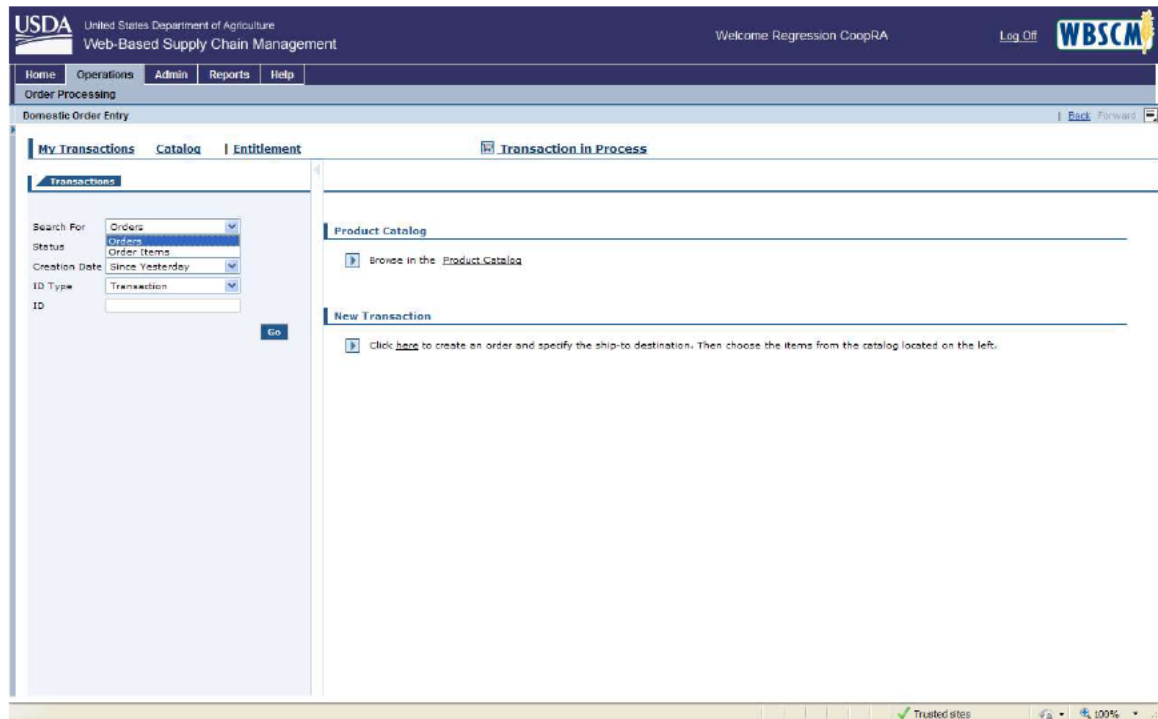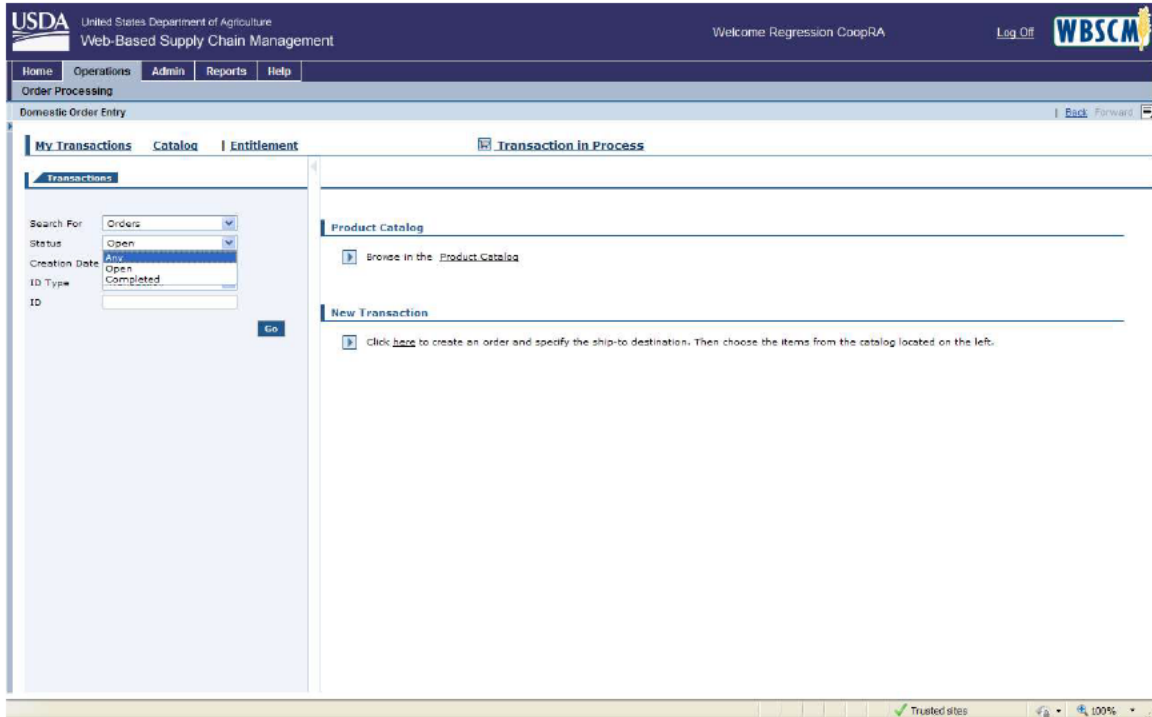
5. From the **Dropdown** list, select Orders (the **Orders** option).

(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

6. In the **Status** field, click on the **Dropdown** button. From the **Dropdown** list, select Any (the **Any** option).
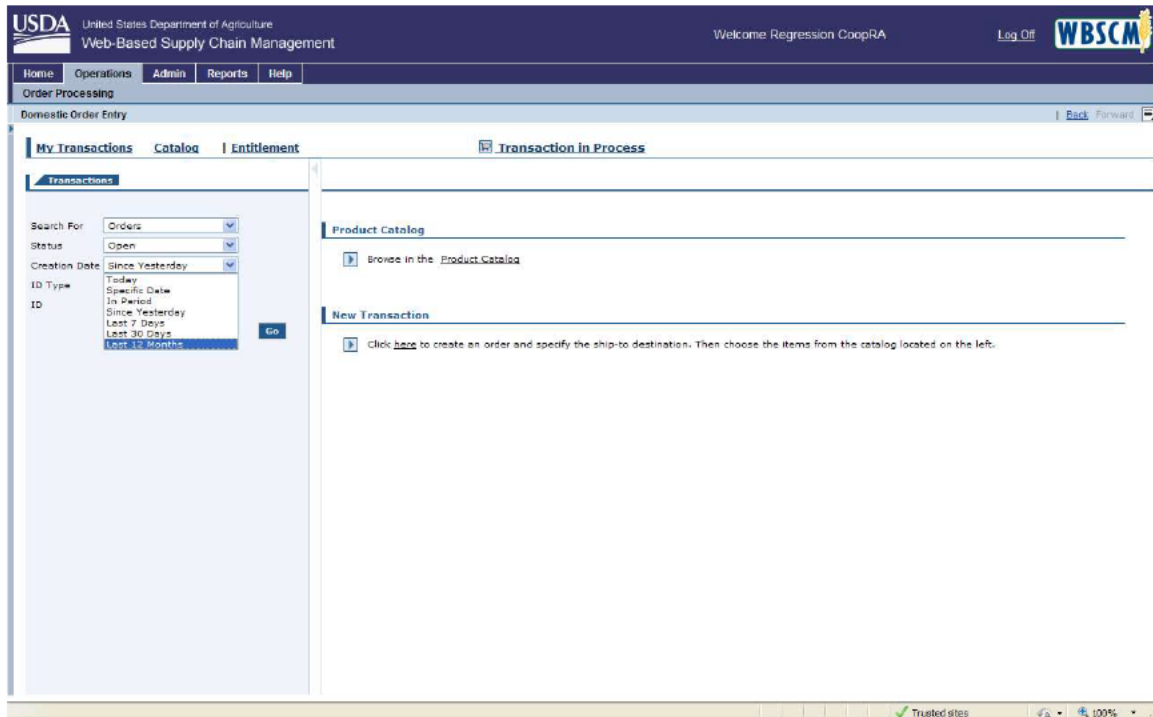
(Note) Selecting **Any** will ensure that the results list contains requisitions in both the open and completed statuses.

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

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

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

My Transactions Screen

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

Domestic Order Entry Screen

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

Domestic Order Entry Screen

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.

Domestic Order Entry Screen

12. You have completed this transaction.

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:

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

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
    - 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.
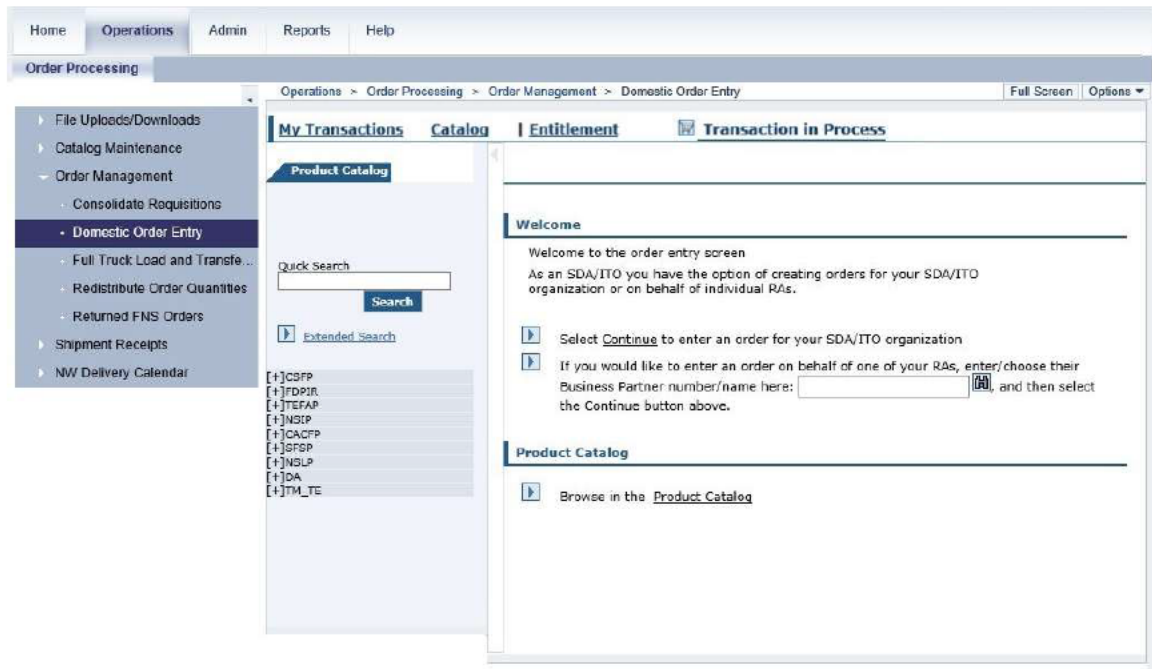
Image: Domestic Order Entry Screen

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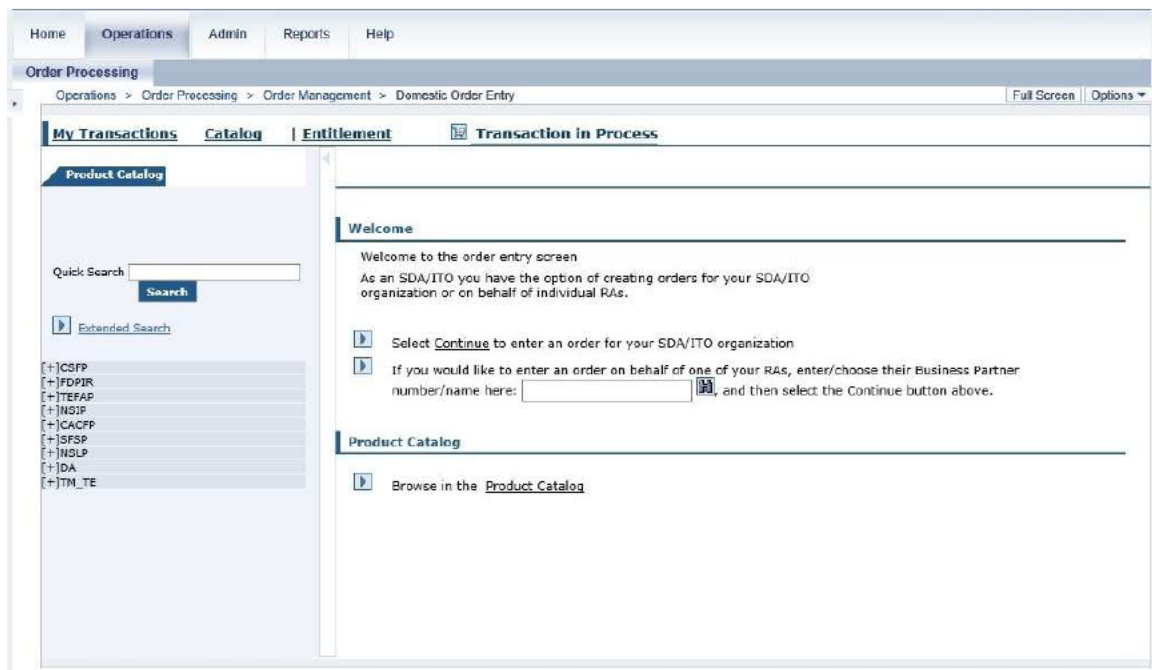
3. Click | **Entitlement** (the **Entitlement** link) to execute a query on entitlement balances, which opens the search in a new window.

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

- Click **My Transactions** (the **My Transactions** link) to search for and display requisitions that have previously created.
- Click **Catalog** (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

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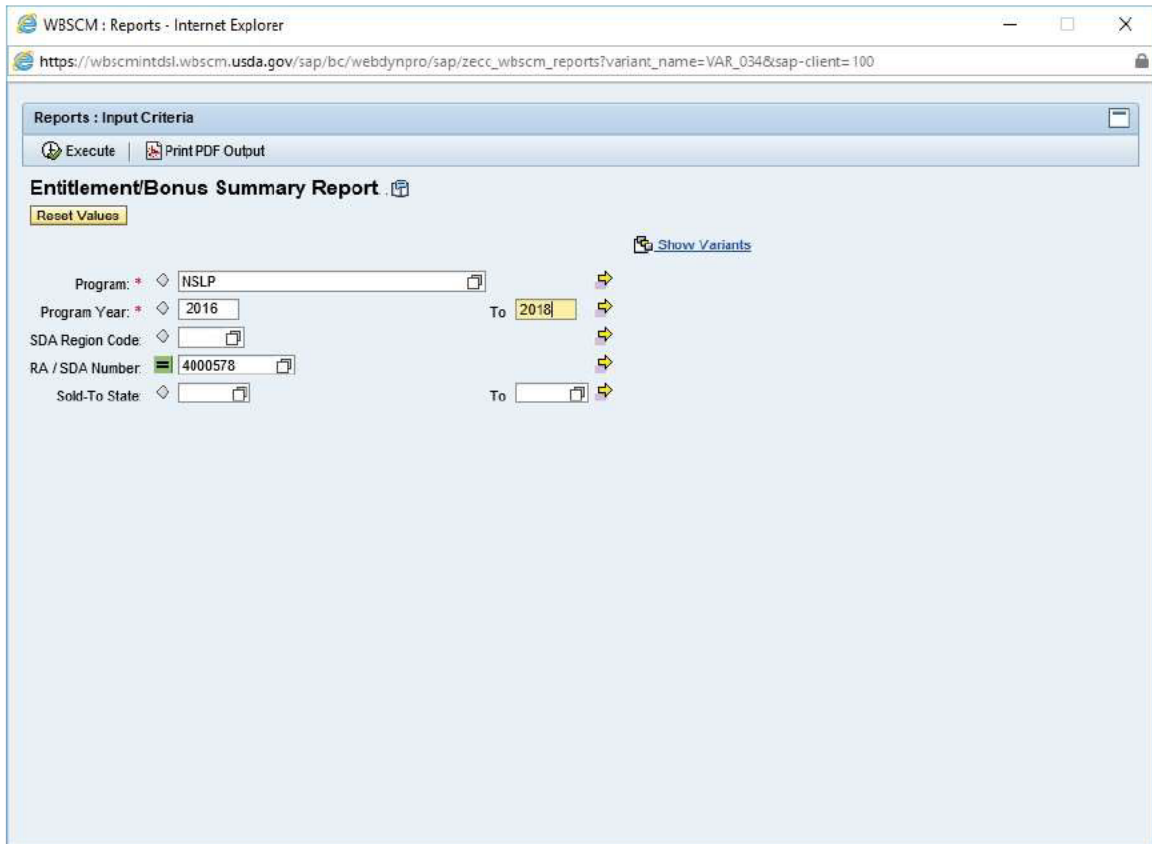
Field	R/O/C	Description
Program Year	R	Year when the customer will be able to use the funds allocated for the specific program. **Example:** 2016 (Note) To select a range of years when generating a report enter the ending year in the **To** field.
SDA Region Code	O	Code assigned to SDA based on their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

Image: Entitlement/Bonus Summary Report Screen

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

ℹ (Note) The following options are available:
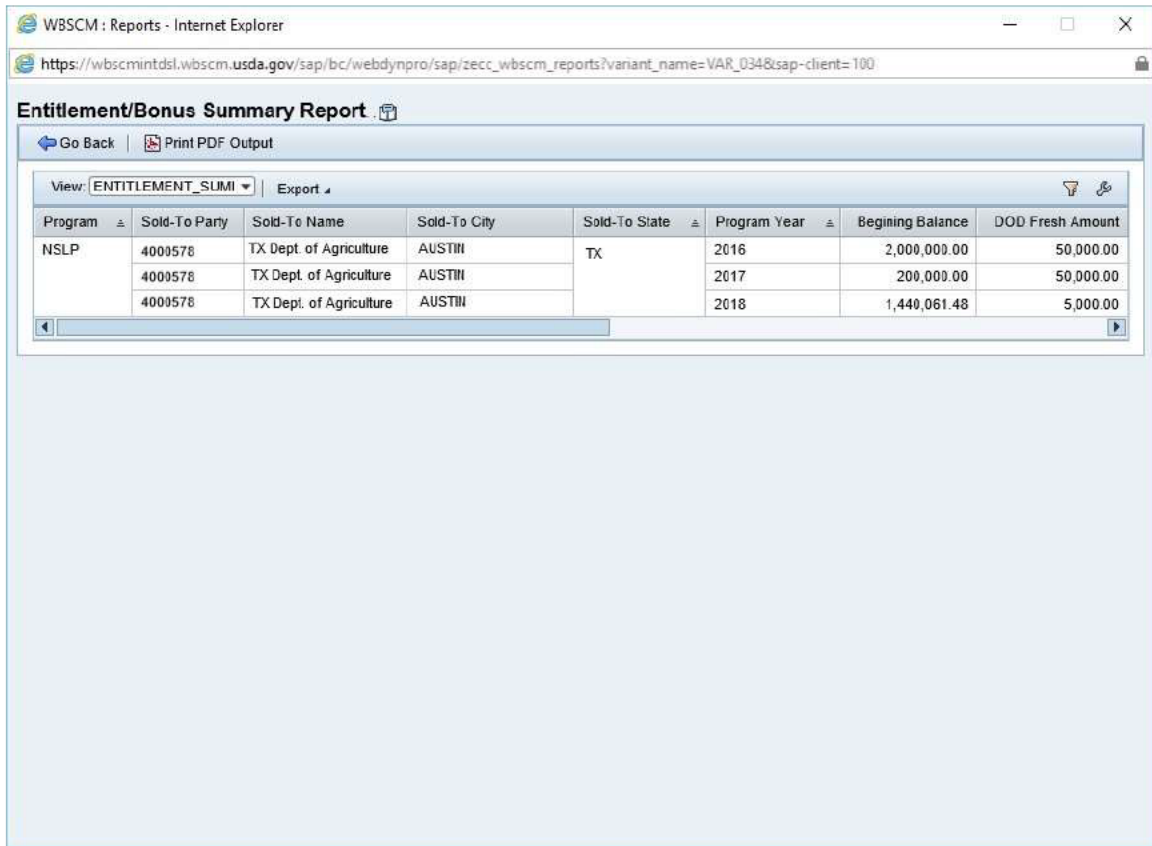
- Use 📄 Print PDF Output (the **Print PDF Output** button) to generate the report as a formatted PDF file to print, save, or share.
- Use Reset Values (the **Reset Values** button) to clear the fields and reset the selection criteria.
- Use ⇨ (the **Yellow Arrow** button) to enter additional selection 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 ▴ (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

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

Field	R/O/C	Description
Program	O	Acronym to identify a USDA food distribution program.
Sold-To Party	O	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	O	Unique identifying name associated with a particular customer in WBSCM.

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

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

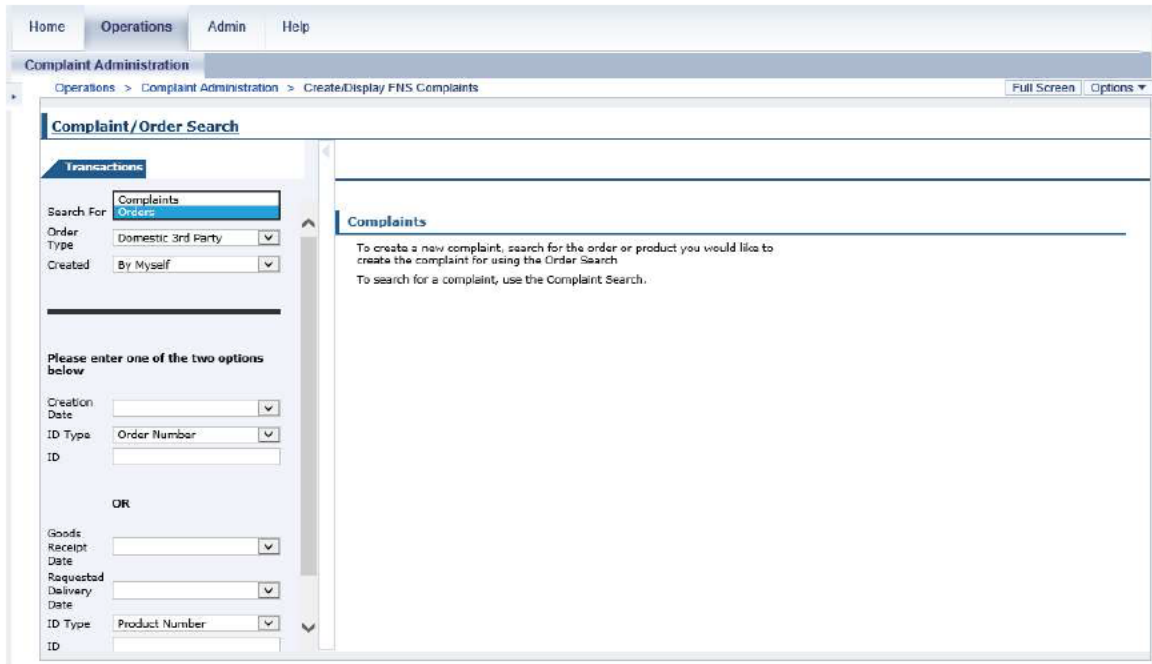**Image: Create/Display FNS Complaints Screen**

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

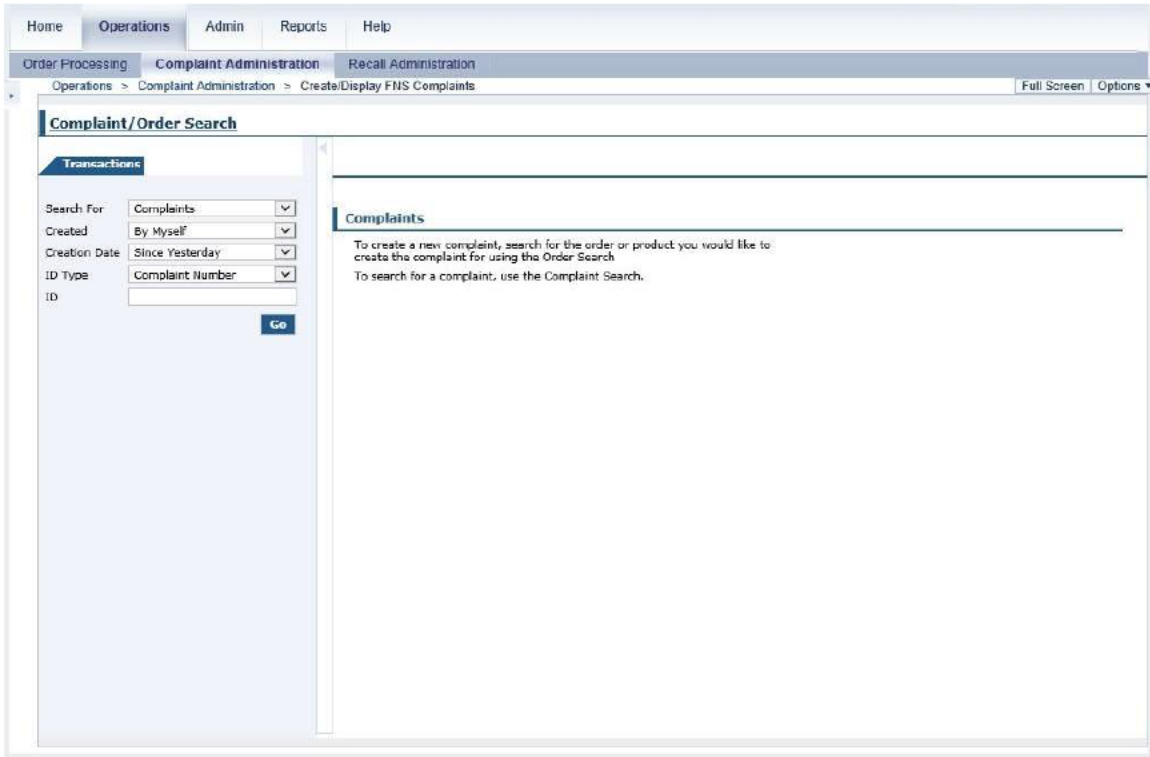**Image: Create/Display FNS Complaints Screen**

4. Select [Complaints] (the **Complaints** option).

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

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

Image: Create/Display FNS Complaint Screen

| Home | Operations | Admin | Reports | Help |

| Order Processing | Complaint Administration | Recall Administration |

Operations > Complaint Administration > Create/Display FNS Complaints   Full Screen | Options ▼

Complaint/Order Search

Transactions

Search For	Complaints	▼
Created	By Myself	▼
Creation Date	Since Yesterday	▼
ID Type	Complaint Number	▼
ID		

Go

Complaints

To create a new complaint, search 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.

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

| Field	R/O/C	Description
Created	O	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	O	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	O	The criterion used to locate a document. **Example:** Complaint Number (Note) For FNS complaints, **ID Type** options are: • Complaint Number • Complaint Material
ID	O	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.

Image: Create/Display FNS Complaints Screen
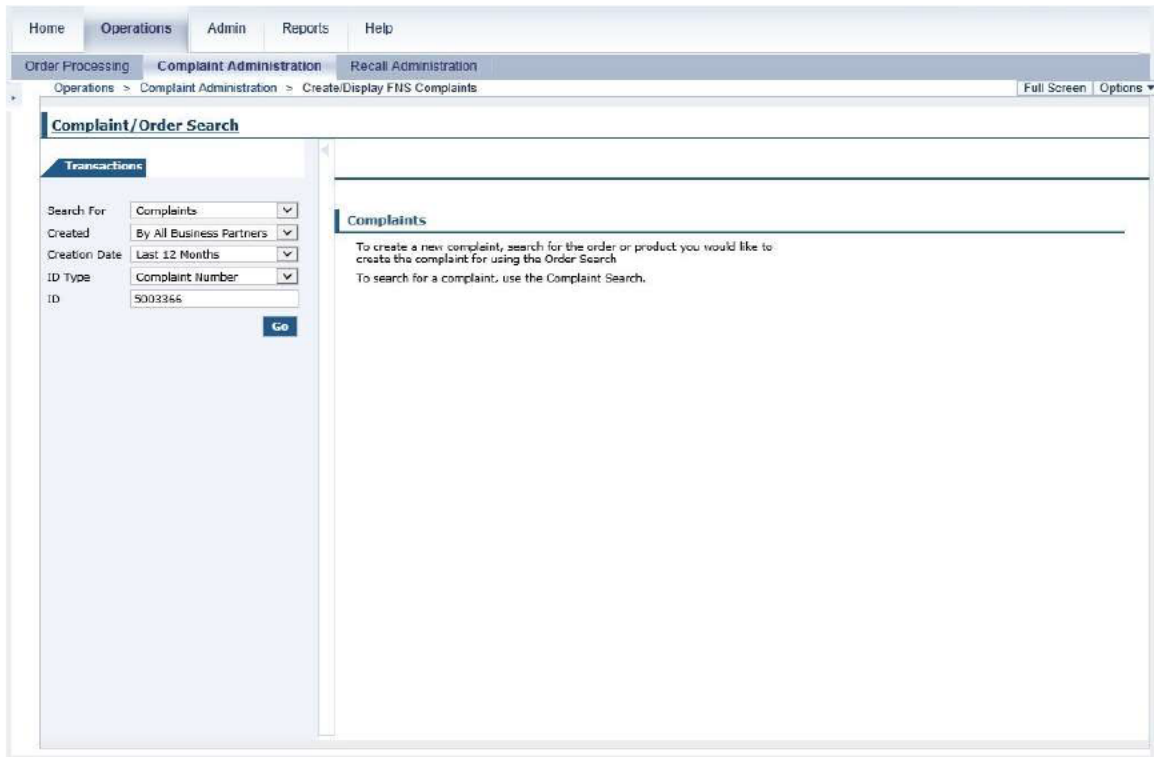
6. Click [Go] (the **Go** button) to execute the search.
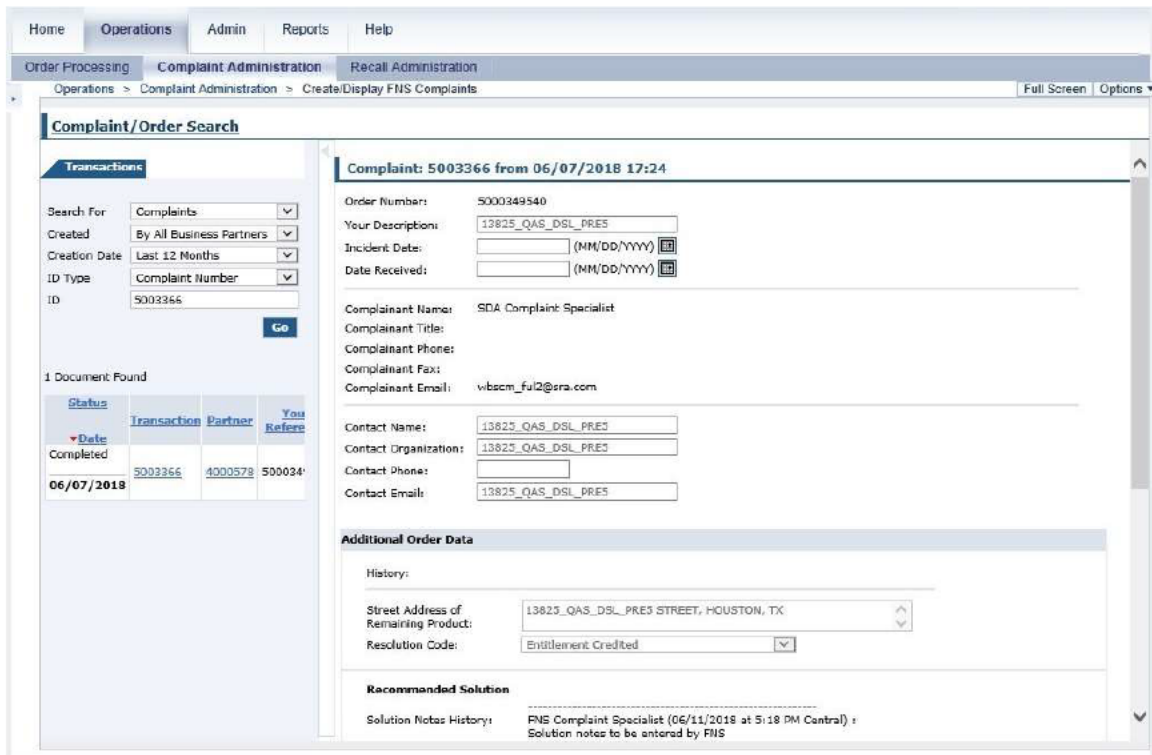
Image: Create/Display FNS Complaints Screen
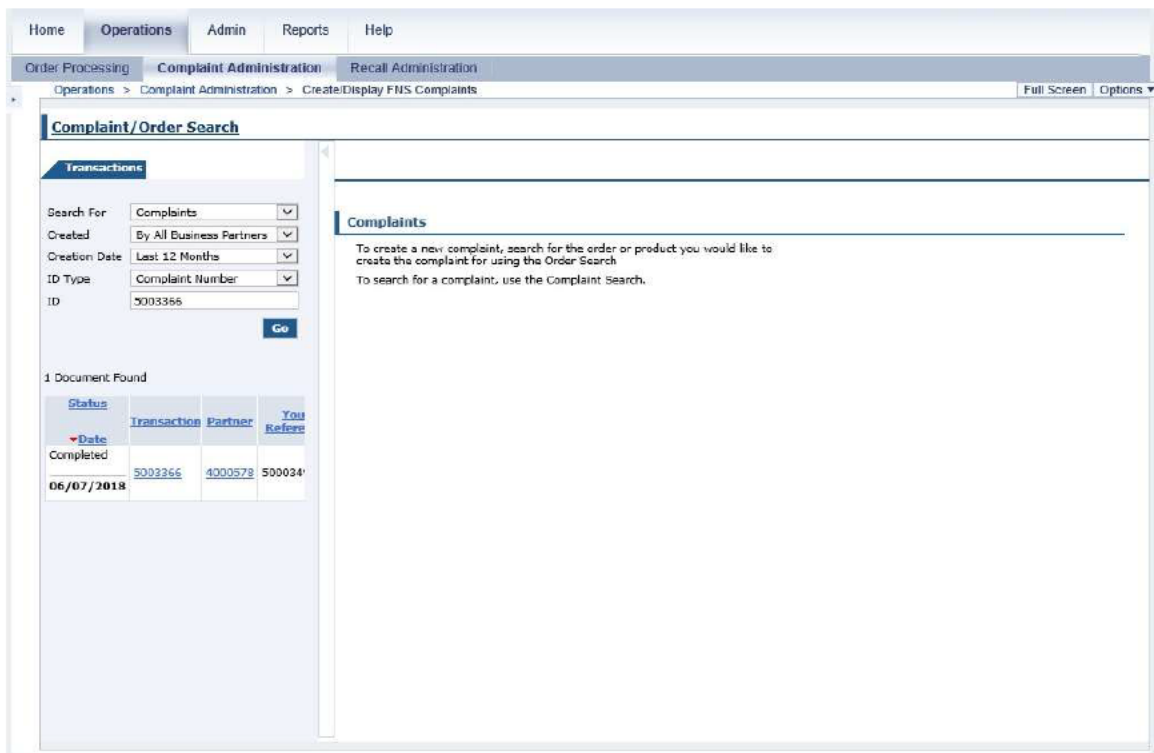
7. Select the Complaint Number to display from the *Search* panel. In this example, 5003366 (the **5003366** link) is selected.

8. Perform one of the following:

If	Then
The user does not need to select additional search criteria	1. Click ◄ (the **Hide Complaint/Order Search** arrow) to minimize the *Search* panel. 2. Go to Step 9.
The user may still need to view the search criteria	Go to Step 9.

Image: Create/Display FNS Complaints Screen

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

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

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

Field	R/O/C	Description
Status	O	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 Complaint Statuses and Resolution Codes Job Aid for additional information.

Image: Create/Display FNS Complaints Screen

10. Click ⌄ (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.

Image: Create/Display FNS Complaints Screen

| Home | Operations | Admin | Reports | Help |

| Order Processing | **Complaint Administration** | Recall Administration |

Operations > Complaint Administration > Create/Display FNS Complaints   Full Screen | Options ▼

Complaint/Order Search

Additional Order Data

History:

Street Address of Remaining Product: 13825_QAS_DSL_PRE5 STREET, HOUSTON, TX

Resolution Code: Entitlement Credited

Recommended Solution

Solution Notes History: FNS Complaint Specialist (06/11/2018 at 5:18 PM Central) : Solution notes to be entered by FNS

Complaint Type: CT-Re-Inspection

	Item	Product	Quantity	Description	Program	Status	Quantity Affected	Quantity Remaining
	1000	100449	10.000 CS	CEREAL CORN FLKS 1080 PKG-12/18 OZ	TEFAP	Closed	1200.000	1200.000
Preceding Document:			Order 5000349540 / 100					

Status History

SDA Complaint Specialist, 2018-06-07 17:24:47 : Draft
SDA Complaint Specialist, 2018-06-07 17:41:43 : Submit
, 2018-06-07 17:46:59 : CT-Review
FNS Complaint Specialist, 2018-06-11 17:18:25 : Closed

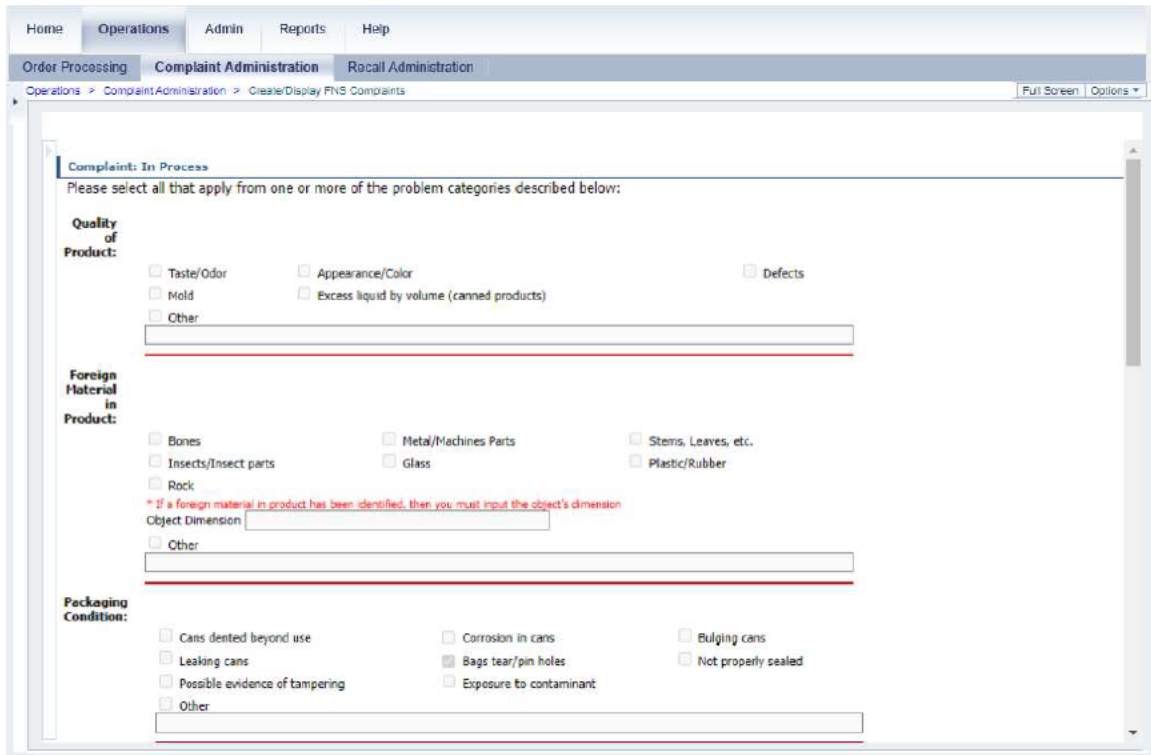Close   Continue

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.

Image: Create/Display FNS Complaints Screen

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

Image: Create/Display FNS Complaints Screen

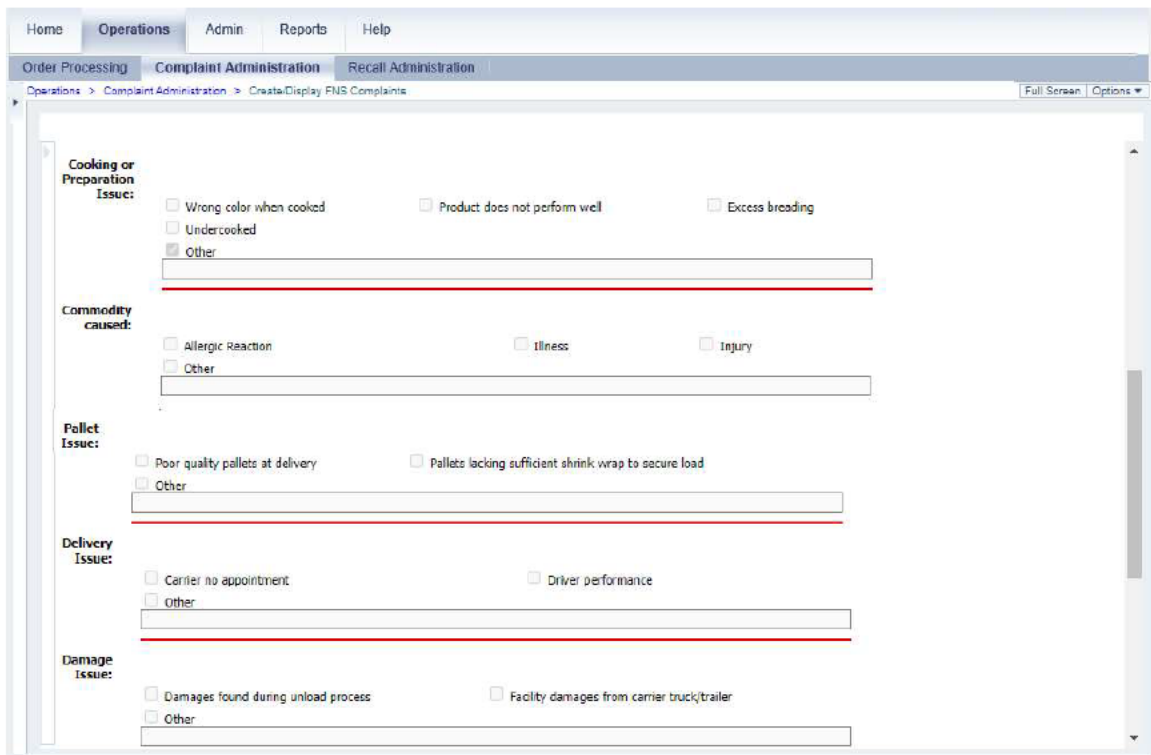**13.** If necessary, click ▼ (the **Down** arrow) on the vertical scrollbar to review additional fields.

Image: Create/Display FNS Complaints Screen

| Home | Operations | Admin | Reports | Help |

| Order Processing | Complaint Administration | Recall Administration |

Operations > Complaint Administration > Create/Display FNS Complaints   Full Screen | Options ▼

☐ Carrier no appointment   ☐ Driver performance
☐ Other
_____

Damage Issue:
☐ Damages found during unload process   ☐ Facility damages from carrier truck/trailer
☐ Other
_____

Leak Issue:
☐ Faulty packaging/cans leaking even though not damaged
☐ Other
_____

Refused Load Issue:
☐ Infestations/Pest   ☐ Goods not delivered at proper temperature   ☐ Majority of load shifted
☐ Other
_____

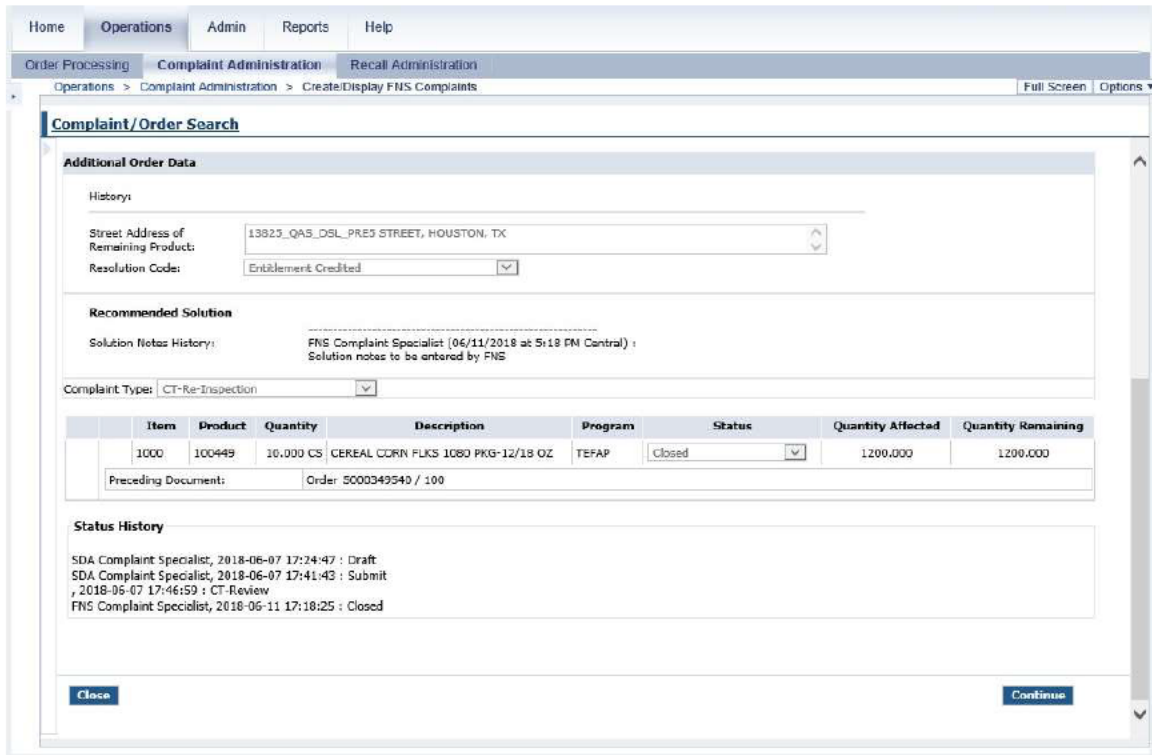Do you feel this complaint raises a food safety concern? ○ Yes ● No

If this complaint is for information and trend analysis only, please check here: ☐
It is not always possible to replace product, but if you wish to request replacement, please check here: ☐

Back   **Continue**

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

Image: Create/Display FNS Complaints Screen

| | Home | Operations | Admin | Reports | Help |

Order Processing | **Complaint Administration** | Recall Administration

Operations > Complaint Administration > Create/Display FNS Complaints   Full Screen | Options ▼

Complaint/Order Search

Additional Order Data

History:

| Street Address of Remaining Product: | 13825_QAS_DSL_PRE3 STREET, HOUSTON, TX |
| Resolution Code: | Entitlement Credited |

Recommended Solution

Solution Notes History:
FNS Complaint Specialist (06/11/2018 at 5:18 PM Central) :
Solution notes to be entered by FNS

Complaint Type: CT-Re-Inspection

	Item	Product	Quantity	Description	Program	Status	Quantity Affected	Quantity Remaining
	1000	100449	10.000 CS	CEREAL CORN FLKS 1080 PKG-12/18 OZ	TEFAP	Closed	1200.000	1200.000
Preceding Document:			Order 5000349540 / 100					

Status History

SDA Complaint Specialist, 2018-06-07 17:24:47 : Draft
SDA Complaint Specialist, 2018-06-07 17:41:43 : Submit
, 2018-06-07 17:46:59 : CT-Review
FNS Complaint Specialist, 2018-06-11 17:18:25 : Closed

Close   Continue

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.