

PROCESS OVERVIEW

Purpose

Use this transaction to execute a transaction report. Transaction reports are customized reports that users can run on a variety of topics: procurement, fulfillment, and finance. Users can determine search criteria, sort columns in ascending or descending order, establish hidden and displayed columns, filter search results, determine visual display, print specifications for the report, print the report, and export the report to excel. Transaction reports can encompass a variety of topics. The topics of the reports will vary based on your User ID and security access.

Process Trigger

Perform this transaction to run a Transaction report in WBSCM.

Prerequisites

 Transactions must have been completed in the WBSCM system before a report can be run on them.

Portal Path

Follow the Portal path below to complete this transaction:

• Select Reports tab → Order Processing tab → Multi-Food Requisition Report link to go to the *Multi-Food Requisition Report* initial screen.

Tips and Tricks

- 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: Reports tab → Order Processing tab → Multi-Food Requisition Report

Multi-Food Requisition Report Screen

USDA United States Department of Web-Based Supply C	^{Agriculture} hain Management	Welcome FNS ORGADMIN	<u>Log Off</u>	BSCM
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2. As required, complete/review the following fields:

Field	R/O/C	Description
Program	R	Acronym to identify a USDA program.
		Example: nslp
Delivery Date	R	Use the Delivery Date field to enter the desired delivery date for the order.
		Example: 09/01/2009



Field	R/O/C	Description
То	R	Upper limit of the range to be selected from a list.
		Example: 12/04/2009

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3. Click Execute (the Execute button) to run a Multi-Food Requisition Report based on the filter criteria you have established.



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CHEESE/CHEDDAR WHITE/SHREDDED					NY	100.000	CS	41,236.50	09/30/2009
INFANT/FORMULA DRY/CANNED					NM	128.000	CS	70,502.11	10/01/2009
FRUIT/APPLES/CANNED					NM	85.000	CS	1,327.19	10/01/2009
FRUIT/PLUMS/CANNED					NM	85.000	CS	12,464.34	10/01/2009
FRUIT/ORANGE/JUICE					ИМ	168.000	CS	24,772.23	10/01/2009
VEGETABLES/TOMATOES/JLICE					МИ	168.000	CS	21,975.86	10/01/2009
MLK/EVAP/CANNED					NM	460.000	CS	43,244.16	10/01/2009
FRUIT/APPLESJUICE					NM	224.000	CS	36,366.12	1.0/01/2009
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CHEESE/PROCESSED/LOAVES					OR	000.08	CS	31,480.90	10/01/2009
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MLK/NSTANT/PACKAGE					OR	54.000	cs	22,744.59	10/01/2009
FRUIT/APRICOT/CANNED					OR	40.000	CS	5,996.34	10/01/2009
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FRUIT/APPLESJUICE					OR	80.000	CS	12,987.90	10/01/2009
FRUIT/ORANGE/JUICE					OR	000.08	CS	11,796.30	10/01/2009
VEGETABLES/TOMATOES/LICE					OR	000.08	CS	10,464.70	10/01/2009
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4. Scroll to the right of the screen.

(Note) The report is organized in table format, with each column containing a unique type of data. Scrolling to the right-hand side of the report will display some options for customizing the display of the report. For example, columns in the report can be displayed or hidden by using the *Settings* feature.



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			NM	85.000	CS	12,464.34	10/01/2009	10/01/2009
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			NM	490.000	CS	43,244.16	10/01/2009	10.01/2009
			NM	224.000	cs	36,366.12	10/01/2009	10/01/2009
			NM	480.000	CS	57,609.22	10/01/2009	10.01/2009
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- 5. Click Eitter (the Filter link) to establish a filter for a column in the report.
 - (Note) By clicking the **Filter** link, a filter row is displayed. A filter row is a blank row at the top of the table. You may enter search criteria (filter criteria) into this row. For example, to view entries with the ship-to state of Illinois (IL), enter IL into this filter row, and press the enter button on your keyboard. Only items containing IL in this field will display in the table.



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NM NM	480.000	CS	43,244.15	10,01/2009	10/01/2009
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6. As required, complete/review the following fields:

Field	R/O/C	Description
Req Delivery Date Filter	R	A filter for the Req Delivery Date column.
		Example: 10/01/2009



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7. Press the Enter key on your keyboard to establish the filter.



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CANNED					OR	40.000	CS	5,996.34	10/01/2009	10.01/2009
KTAIL/CANNED					OR	40.000	CS	5,607.08	10/01/2009	1.0.01/2009
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8. Click Settings (the Settings link) to access further options for personalizing the display of the report.



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9. There are 2 tables visible in the **Column Selection** tab of the **Settings** pop-up. One is dedicated to hidden columns, and the other to displayed columns. Moving columns from one table to the other using the Add and Remove buttons, determines whether the column will be displayed or hidden in the report. To move a column, highlight (the **Blue** box) next to the desired column you wish to move.

(Note) To select multiple columns, hold the Control button on your keyboard and click (the **Blue** Box) next to each column.



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10. Hold the Control button on your keyboard while you click (the **Blue** box) to the left of **Ship-to Name** to select this column for hiding.



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11. Hold the Control button on your keyboard while you click (the **Blue** box) to the left of **Ship-to City** to select this column for hiding.



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13. Click **Remove** (the **Remove** button) to remove these Ship-to information columns from the **Displayed Columns** table and move them into the **Hidden Columns** table.



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14. Navigate through the other tabs next to the **Column Selection** tab to further customize the report. When you have finished making selections, click OK (the **OK** button) to apply your customized settings.



(Note) Notice that the *Column Selection* tab is currently selected, the other tabs in the **Settings** pop-up serve various functions:

Column Selection - choose from over thirty available columns. Designate which columns are hidden and which are displayed in the report. Determine the sequence of columns in your report.

Sort - select a column name. Designate whether you would like the column sorted in ascending or descending order.

Calculation - calculate the sums and averages for particular columns in the report.

Filter - add a filter row. Filter the report by certain criteria documented on this tab.

Display - determine the visual display of the report, including the number of rows displayed in a page, and the coloration of the report.

Print Version - determine print specifications including page dimensions, landscape or portrait printing, and header and footer dimensions.



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15. You have completed this transaction.



RESULT

You have created and personalized a Multi-Food Requisition Report.



PROCESS OVERVIEW

Purpose

The purpose of this transaction is for a National Warehouse Org Admin to export multi-food orders placed by SDAs, ITOs, RAs, or Co-ops from WBSCM to a download file in CSV, XML, or XLS format. After exporting the orders, they can use the tools available in their spreadsheet application or other software to customize the layout and content using settings, filters, and search criteria.

Process Trigger

Use this transaction to export multi-food orders that need to be filled by the National Warehouse.

Prerequisites

Multi-food orders must exist in WBSCM.

Portal Path

Follow the Portal path below to complete this transaction:

 Select Operations tab → Warehouse Management tab → File Uploads/Downloads folder → National Warehouse Orders to be Filled link to go to the National Warehouse Orders to be Filled 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 Portal Basic Navigation course for tips on creating favorites, performing searches.



PROCEDURE

1. Start the transaction using the following Portal path: Operations tab → Warehouse Management tab → File Uploads/Downloads folder → National Warehouse Orders to be Filled link.

Image: National Warehouse Orders to be Filled Screen

	Operations > Warehouse Management > File Upleads/Downloads > National Warehouse Orders to be Filled	Full Screen Options
Delivery Management Inventory Management Batch Management File Upleads/Downloads	Welcome to the National Warehouse Orders to be Filled Application At required fields are marked with a red asterisk (*) Dates are formatted as MM/DDPYYYY Input Search Criteria	
Upload BOLs from National Upload National Warehouse	Warehouse: NW AMERICOLD-SYRACUS Program: Delivery Date: To Materia: To Sold-TO Party: To Ship-To Party: To Execute	

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

Image: National Warehouse Orders to be Filled Screen

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

Field	R/O/C	Description
Program	0	Acronym to identify a USDA food distribution program.
Delivery Date	0	Range of dates when materials/commodities may be delivered. (Note) This is the date the customer requested for delivery of materials/ commodities to the specified Ship-to party location. Use the the Calendar button) to select dates from a calendar.
Material	0	Unique six-digit number representing a specific material/commodity in WBSCM.
Sold-To Party	0	Unique identifying number associated with a particular customer in WBSCM.
Ship-To Party	0	Unique identifying number associated with a person or company that receives the goods.



(Note) The results list will display all orders that match the search criteria. In this example, a **Delivery Date** range of **05/01/2019** to **06/01/2020** was entered.



Image: National Warehouse Orders to be Filled Screen

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4. Click Execute (the Execute button) to start the search.

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Image: National Warehouse Orders to be Filled Screen

- 5. Review the result list.
- **6.** Perform any of the following:

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The user needs to download the results list as XML file	1. Click	m) to dov	ad XI wnlo	ML File (the Download XML ad the file.
	2. Click	Save	-	(the Save button) to save the



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	file.
	3. Enter File name and click Save (the Save button) to close the pop-up window.
The user needs to download the results list as CSV file	1. Click Download CSV File (the Download CSV File button) to download the file.
	2. Click Save (the Save button) to save the file.
	3. Enter File name and click Save (the Save button) to close the pop-up window.
The user needs to download the results list as a spreadsheet file	1. Click Export (the Export button) to view export options.
	2. Click Export to Microsoft Excel (the Export to Microsoft Excel option).
	3. Click Save (the Save button) to save the file.
	4. Enter File name and click Save (the Save button) to close the pop-up window.
	Note: This generates an XLS file, which is compatible with Microsoft Excel and many other spreadsheet applications.

7. The transaction is complete.



RESULT

The user exported the list of orders to the specified download format for offline use.



PROCESS OVERVIEW

Purpose

A Recipient Agency (RA) is a domestic customer that has access to create orders in WBSCM. SDA Org Admins are responsible for creating new RAs in WBSCM. They can do this in two ways - by manually entering in the RA data or by importing an XML file. Most commonly, they will use the "Create RA Organization" procedure, except when they wish to transfer information storage in USDA's legacy systems. Use this transaction to import a new Recipient Agency organization via an XML file upload.

Process Trigger

After an XML file has been created and contains all required data for the new RA, use this transaction to upload this file and create the new RA in WBSCM.

Prerequisites

• An XML file containing all required data for the new RA must exist.

Portal Path

Follow the Portal path below to complete this transaction:

• Select Admin tab → Organization Maintenance tab → Upload New RA Organizations to go to the Upload New RA Organizations initial 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

 Start the transaction using the following Portal path: select Admin tab → Organization Maintenance tab → Upload New RA Organizations

Image: Upload New RA Organizations Screen

Home Operations Admin Report	s Hep	
Manage Users Master Data Organization	Maintenance	
	Admin > Organization Maintenance > Upload New RA Organizations	Full Soreen Options =
Manape Users Master Data Organization Mantain Organization • Upload New RA Organizations • Upload RA Updates.	Admin > Organization Maintenance > Upload New RA Organizations Welcome to the Upload New RA Organization Application Al recutred fields are marked with a red asterisk (*). RA File Upload Selection * File Name: Choose File No file chosen Submit:	Full Sorzen Options ♥

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



Image: Upload New RA Organizations Screen



3. Click Choose File (the Choose File (button) to locate and select the file.



(Note) RA upload XML file can contain a maximum of 200 RAs.



Image: Upload New RA Organizations Screen

Manage Users	Master Data Organiza	on Maintenanse	
Admin > Organiza	ition Maintenance > Upli	é Naw R.A. Organizations	Full Screen Options
Welcome I Al required fiel RA file Uplo * File Name: Submit	to the Upload Ne do are marked with a red in ded Selection	RA Organization Application letisk (*). anization File.xm	

4. Click Submit (the Submit button) to upload the file. In this example, the New RA Organization File.xIm file is selected for upload.

mage:	Upload	New	RA	Organizations	Screen
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Admin > Organization Maintenance >	Upload New RA Organizations					Full Screen	Option
New RA Organizations Re	sult Screen						
Business Partners Successfully Cr	cated						
RA Name			RA Identifier		BP	D	
DSLY_NEW_RA_11			ABY11		801	5180	
DSLY_NEW_RA_12 RA Download XML File Business Partners Not Created			ABY12		801	5181	
DSLY_NEW_RA_12 RA Download XML File Business Partners Not Created RA Name		Message	ABY12	R	801 A Identifier	5181	
DSLY_NEW_RA_12 RA Download XML File Business Partners Not Created RA Name BLEE TEST 081518B RA 001		Message Duplicate RA	ABY12	RJ	A Identifier LEE081518B001	5181	
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5. The transaction is complete.



(Note) A list of RAs successfully created will appear in the *Business Partners Successfully Created* screen section. A list of any RAs not created will appear in the *Business Partners Not Created screen* section.



RESULT

SDA/ITO org admin has created a new RA organizations using the upload option in WBSCM.



PROCESS OVERVIEW

Purpose

The purpose of this transaction is to maintain full truck load requests in WBSCM. The *Full Truck Load and Transfer Requests* forum is a message board where State Distributing Agencies (SDAs) and Indian Tribal Organizations (ITOs) can communicate with one another regarding split shipments. It is best practice to list the material number, group number, and ship-to location in a forum post.

Process Trigger

Use this procedure to coordinate a split shipment with another SDA or ITO.

Prerequisites

None

Portal Path

Follow either Portal path below to complete this transaction:

- Home tab → Forums tab → Full Truck Load and Transfer Requests link
- Operations tab > Order Management folder > Full Truck Load and Transfer Requests link

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 navigational training and tips on creating favorites, performing searches, etc.



PROCEDURE

Image: Forums Screen

1. Start the transaction using either of the above Portal paths. In this example, Home tab → Forums tab → Full Truck Load and Transfer Requests link portal path is selected.

			Ju Control P
brum Home			
arch All Forums		245- 32 9	
Forum / Category WBSCM News and Announcements	Views 87.423	Threads / Messages	Last Post Sep 22, 2023
ENS News and Announcements	11,018	5/5	Sep 23, 2022 9:21 AM Last Post By: Ziegler, Danielle 1
FNS News and Announcements (SDA)	4,684	7/7	Sep 23, 2022 9:19 AM Last Post By: Ziegler, Danielle :
Full Truck Load and Transfor Doquests	51,510	0/0	Jun 13, 2023 11:39 AM
Puil Huck Load and Hansler Requests	14,175	16 / 16	Oct 26, 2017 3:34 PM Last Post By: Fortner, Charleia
USDA Holds and Recalls			

2. Click Full Truck Load and Transfer Requests (the Full Truck Load and Transfer Requests link)

to open the Full Truck Load and Transfer Requests forum.

Image: Forums: Full Truck Load and Transfer Requests Screen



3. Click Post New Thread (the Post New Thread link) to add a new thread.

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(Note) The benefit of posting a thread is that other SDAs or ITOs can respond to the post with questions or offers to split. For FNS users, it is also possible to post an announcement; however, an announcement does not allow others to reply.

Use ^{watch Forum} (the **Watch Forum** link) to watch the forum. Whenever a response, new thread, or an announcement is posted, users will receive an email notification.

	Search Forum		
		Go	(the Search Forum field) to perform a search
Ose	2000 - Contra Cont		(the Search Forum held) to perform a search

for keywords on the discussion forum.

For more information on WBSCM forums, refer to the <u>WBSCM Forums Notification Settings</u> job aid.

Image: Forums: Full Truck Load and Transfer Requests Screen

nd Alerts	Forums Inbox	
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e your m nediately	message using the form below. When you have finished, you can optionally preview your post by ly.	choosing the "Preview" tab. Otherwise, choose "Post Message" to submit your message
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ibject:		
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ubject:	Mark this thread as a question - this encourages people to participate and helps y	ou track answers
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4. As required, complete/review the following fields:

Field	R/O/C	Description
Subject:	R	Subject of the message being posted to the forum.
		Example: Cereal Shipment in Southwest Region
Message:	с	Message being posted to the forum. This is a free text field that allows entry of a message.
		Example: Are you interested in splitting with us? We have 500 cases of cereal (material code 100530) going to Houston on 12/31/2023. We need someone to order 400 more cases to make a full truck. When you are consolidating,



Field	R/O/C	Description
		enter group number 50000193 to link your order with ours so that they go on the same truck.

Image: Forums: Full Truck Load and Transfer Requests Screen

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5. Select (the "Mark this thread as a question - this encourages people to participate and helps you track answers" check box).

Image: Forums: Full Truck Load and Transfer Requests Screen

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6. If necessary, click 🐨 (the **Down** arrow) on the vertical scrollbar to scroll to the bottom of the page.

Image: Forums: Full Truck Load and Transfer Requests Screen

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		Link: [Name URL Tip]	Name
		E-Mail: (foo@bac.com)	foodbaccom

7. Click Post Message (the Post Message button).

Image: Forums: Full Truck Load and Transfer Requests Screen

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Beoly To This Thread Replies: 0 - Pages: 1 Iroles. SDA estr: 1 gistered: 11/27/23	Search Forum Watch This Thread Eack To Thread List Cereal in Southwest Region Posted: Nov 27, 2023 4:16 PM Are you interested in splitting with us? We have 500 cases of cereal (material code 1 order 400 more cases in order to make a full truck. When you are consolidating, ente they go on the same truck.	I00530) going to Houston on 12/31/2023. We need someone to ar group number 50000193 to link your order with ours so that
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8. Review the displayed information.



(Note) A thread will be deleted 90 days after the most recent post. This means that once the most recent post is 90 days old, the entire thread will be deleted. Each time there is a new post, the 90-day counter starts over.



Use <u>Watch This Thread</u> (the Watch This Thread link) to receive an email notification whenever a response is posted.

Use Back To Thread List (the Back To Thread List link) to return to the *Full Truck Load Request* forum page.

For more information on WBSCM forums, refer to the <u>WBSCM Forum Notification Settings</u> job aid.

9. The transaction is complete.



RESULT

A thread has been successfully posted on the Full Truck Load and Transfer Requests forum.



PROCESS OVERVIEW

Purpose

The purpose of this transaction is for a National Warehouse Org Admin to determine delivery dates for the SDAs and ITOs ordering out of their warehouse. After the National Warehouse Org Admin performs this transaction, the SDA and ITO users may log in and create non-delivery dates off the same calendar.

Process Trigger

Use this procedure to set the delivery calendar in WBSCM after the NW Org Admin and the customer have agreed on delivery dates.

Prerequisites

• SDA/ITO must be part of a multi-food program.

Portal Path

Follow the Portal path below to complete this transaction:

• Select Operations tab → Order Processing tab → NW Delivery Calendar folder → Maintain National Warehouse Delivery Calendar link to go to the Maintain National Warehouse Delivery Calendar screen.

Tips and Tricks

- 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 → NW Delivery Calendar folder → Maintain National Warehouse Delivery Calendar

Maintain National Warehouse Delivery Calendar Screen

USDA United States Department of Agriculture Web-Based Supply Chain Management	Welcome NW ADMIN	
Home Operations Admin Help		
Order Processing Warehouse Management		
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ed Navigation Selection/Source Delivery Calendar		
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2. Select an organization from the *Organization* dropdown list. In this case, we selected 0004000043: MI Dept. of Education (the **0004000043** :**MI Dept. of Education**).



(Note) After you select an organization, the Ship-To Location field (a dropdown list) will become populated with the ship-to locations that correspond to the organization. These will be displayed in ascending order numerically.

Maintain National Warehouse Delivery Calendar Screen

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Home Operations Admin Help		
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	9	



3. Select the ship-to location from the Ship-To Location dropdown list. In this case, we selected

(the	(h)	

(D) (4) option). Maintain National Warehouse Delivery Calendar Screen

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

Field	R/O/C	Description
Program: *	R	Abbreviation for the specific program through which you are placing your orders. If you do not know the program abbreviation, use the WBSCM search functionality to locate it. Example: CSFP
Calendar Start Date: *	R	Date when you would like the delivery calendar to start. This is a free text field. You may use the calendar icon to display calendars of upcoming months and select the appropriate date.
		Example: 03/04/2010

Ð

(Note) Remember that required fields have a red asterisk adjacent to them. If you do not enter data in a required field, you will receive a hard stop and an error message; you will be prompted to enter the missing information.

To perform the *Selection/Source Delivery Calendar* query, you will need to select an Organization, Ship-To Location, Program, and Calendar Start Date. Use this to create an initial delivery calendar, or to modify an existing delivery calendar.

To perform the *Target Delivery Calendar - Copy-To* query/transaction, you will need to select an Organization, Ship-To Location, and Program. Use this to copy details over from an existing



delivery calendar, and create a replica for a different organization.

For purposes of this transaction, we are only performing the Selection/Source Delivery Calendar query.

Maintain National	Warehouse Deliver	y Calendar Screen
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5. Click Go (the Go button) to display the calendar specified by your criteria.

Maintain National Warehouse Delivery Calendar Screen

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6. Select the radio button beside the **PM** field under Delivery Time to indicate that you wish to add afternoons for the specified dates to the regular delivery calendar.



(Note) Notice that the page displays a delivery calendar beginning with the start date you specified. You can select a specific day of the week and frequency (i.e. entering Wednesday and



four will select the next four Wednesdays following the start date). You can scroll to the **Previous** Year and Next Year using the respective buttons.

If the **Next Year** button is clicked to add dates to a future year, a Pop-up box will open asking "Do you want to save changes" with "yes", "no" and "cancel" options.

• Yes: Dates in the current year and next year are saved, and the user will be directed to the next year's screen.

- No: None of the dates are saved and the user will be directed to the next year's screen.
- Cancel: User continues to stay on the same screen

Maintain National Warehouse Delivery Calendar Screen

USDA Web-Based Supply Chain Ma	: nagement		Welcome NW ADMIN	Log Off	WBSCM
Home Operations Admin Help					
Order Processing Warehouse Management					
Maintain National Warehouse Delivery Calendar					Back Forward -
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hipment Receipts Program. A	CSFP				
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Favorites Repeat Or	n				
Day of We	ek: 🗍 Frequency: 01	Start Date: 🔯 🗛	a		
Calendar	Calendar				
			Previous Year Next year		
Delivery Ti O Al Day	Celvery Time: CAI Day CAM G BA				
	March 2010 April 2	May 2010 Image Fig Fig<			
Save Char	nges Cancel Changes Back to Selection			Q	

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

Field	R/O/C	Description
Day of Week:	R	Enter a day of the week that you wish to include on the delivery calendar.
		Example:
		Monday
Frequency:	R	Frequency with which you want the delivery date to occur.
		Example: 3
Start Date:	R	First delivery date.
		Example: 5/04/2010



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(Note) The National Warehouse Org Admin may use the "Repeat On" functionality to add multiple Delivery Dates that fall on the same day of the week.

Maintain National Warehouse Delivery Calendar Screen

USDA United States Department	nt of Agriculture y Chain Management	Welcome NW ADMIN	Log Of WBSCM
Home Operations Admin	Help		
Maintain National Warehouse Deliver	nanagemam v Calendar		L Back Excurred
ed Navigation Vipment Recepts	Program * CSPP		
Maintain National Warehouse Delivery C	Calendar Start Date: 5 [0204/2010]		
Favorites	Repeat On Cory of Week: Workey T Frequency: 03 Start Date: SOU(2010 10 And		
	Citeman	A Previous Year Next year 🕨	
	Al Day All All<		
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8. Click Add (the Add button) to add the delivery date to the calendar.

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(Note) You may also select single delivery dates (instead of using the "Repeat On" functionality) by clicking the desired delivery date directly on the calendar. Use the left and right arrows next to the displayed calendar months to go to the previous or to the next month within the same calendar year.

Maintain National Warehouse Delivery Calendar Screen

United States Department of Agriculture Web-Based Supply Chain Manag	ement		Welcome NW ADMIN	Log Off	WBSCM
Home Operations Admin Help Order Processing Warehouse Management					
Maintain National Warehouse Delivery Calendar					Back Forward
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9. Click Save Changes (the Save Changes button) to save your changes.





(Note) When displaying the calendar, notice there is a color-coding system, as follows:

Blue boxes indicate you are available to deliver to this organization and ship-to at any time during the day.

Green boxes indicate you are available to deliver to this organization and ship-to at any time in the afternoon.

Yellow boxes indicate that you are available to deliver to this organization and ship-to at any time in the morning.

Red boxes indicate that this is a non-delivery date (such as a holiday) specified by the SDA and that the SDA is unavailable for deliveries.

Maintain National Warehouse Delivery Calendar Screen

USDA United States Department of Web-Based Supply 0	r Agriculture Welcom	
Home Operations Admin H		
Order Processing Warehouse Mar	agement	
Maintain National Warehouse Delivery C	alendar	Back Forward E
ed Navigation	Changes Seved Successfully	
Appment Receipts		
W Delivery Calendar	Selection/Source Delivery Calendar	
Maintain National Warehouse Delivery Ca	Organization * 10004000063-Willburd o v	
Favorites	She-To Locators (b) (4)	
	Program * CSFP	
	Celender Start Date: 5 03,04/2010	
	00	
	Repeat On	
	Dey of Week: Trequency: 01 Start Date: 76	
	Calendar	
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	CALDay GIAM CIPM	
	4 March 2010 April 2010 May 2010 🕨	
	Mo Tulle Th Fr 5a 5u Mo Tulle Th Fr 5a 5u Mo Tulle Th Fr 5a 5u	
	10 8 0 10 11 12 18 14 14 5 0 7 8 0 10 11 18 3 4 5 0 7 8 0	
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10. You have completed this transaction.



(Note) A confirmation message displays: "Changes Saved Successfully"



RESULT

The transaction has been successfully completed.



PROCESS OVERVIEW

Purpose

The purpose of this transaction is to modify or display a Domestic HQ Organization in WBSCM. The updates can include:

- Name and address
- Assign or unassign Business Partner relationships
- Activate or Inactivate Business Partner

Process Trigger

The information for an existing Domestic HQ has changed.

Prerequisites

A Domestic HQ must exist in WBSCM.

Portal Path

Follow the Portal path below to complete this transaction:

- To Maintain the Domestic HQ select Admin tab → Organization Maintenance tab → Maintain Organization link → Maintain HQ Organization link to go to the Maintain Organization screen.
- To Display the Domestic HQ select Admin tab → Organization Maintenance tab → Maintain Organization link → Display HQ Organization link to go to the Display Organization 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 Reference Training Materials* section for basic navigational training and for tips on creating favorites, performing searches, etc.



PROCEDURE

1. Start the transaction using the following Portal path: Admin tab → Organization Maintenance tab → Maintain Organization link.

Image: Maintain Organization Screen



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



Image: Maintain Organization Screen



3. Click Maintain HQ Organization (the Maintain HQ Organization link) to update.



(Note) This work instruction reviews the steps to update a HQ organization. To view the information for a HQ without making changes, click <u>Display HQ Organization</u> (the **Display HQ Organization** link). In display mode, fields are not editable and will appear with a gray background.



Image: Select Sub-Organization Screen



4. Click 🖃 (the HQ drop-down).



(Note) WBSCM defaults to display active HQs in the drop-down when Active (the Active radio button) is selected. If the user needs to display inactive HQs, click Inactive (the Inactive radio button) prior to clicking (the HQ drop-down).



Image: Select Sub-Organization Screen

Home Operations Finance Admin Reports Help	
Manage Users Master Data Organization Naintenance	
Admin > Organization Manienance > Naintain Organization	Full Screen Options +
Select Sub-Organization	
Select the appropriate radio button to display a list of active or inactive sub-organization(s) to choose from.	
Active Oractive	

5. Select the appropriate HQ from the drop-down list. In this example,





(Note) Only one HQ can be modified at a time.

(Note) The available HQs are listed in alphabetical order by name. Use the vertical scrollbar to search through the list, or type the first letter of the name to select from HQ organizations that start with that letter.



Image: Select Sub-Organization Screen

ce liners Master Data Organization Naintenance	
Admin > Organization Maintenance > Naintain Organization	Full Screen Optio
Select Sub-Organization	
select the appropriate racio button to display a list of active or inactive sub-organization(s) to choose from.	
HC: (0) (4)	
I Next	

6. Click Rext (the Next button) to open the record for the selected HQ.

7. Perform one of the following:

lf	Then
The user needs to update an existing HQ organization	Go to Step 8.
The user needs to activate/inactivate an existing HQ organization	Go to Step 15.
The user needs to submit the updates	Go to Step 19



Image: Maintain HQ Organization (Address) Screen

Maintain HQ Organization - Org	anization ID: (b) (4)			
Back				
Address Relationship	Status			
All required fields are marked with a	red asterisk (*).			
Name				
* Name: (b) (4)				
Additional Name:				
Address				
= Streat Address + (b) (4)				
Street Address 2:				
Street Address 3:				
* City: (b) (4)				
* Country: USA	1001			
* State: Minnesota		* Postal Code:		
Louny		2019.		
Submit				

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

Field	R/O/C	Description
Name:	R	Person or business partner's name. Example: (b) (4) HQ
Additional Name:	0	A free text field to enter an additional name or name of recipient.
Street Address 1:	R	A free text field to enter the main street address of the user or organization <u>.</u> Example: 123 Main Street
Street Address 2:	0	A free text field to enter an additional row of street address of the user or organization.



Field	R/O/C	Description
Street Address 3:	0	A free text field to enter an additional row of street address of the user or organization.
City:	R	City where the user or company is located. Example: (b) (4)
Country:	R	Country code that represents country name. Example: USA (Note) The Country I (Drop-down button) displays a list of countries.
State:	R	The abbreviation of United States territory, district or state. Example: Minnesota (Note) The State (Drop-down button) displays a list of states and territories.
Postal Code:	R	A ZIP code. Example: (b) (4)



Image: Maintain HQ Organization (Address) Screen



Click Relationship (the **Relationship** tab) to review and modify a relationship between the HQ and the business partner(s).



9.

(Note) The user may toggle between the Address, Relationship, and Status tabs without losing unsaved changes.



Home	Operations	Finance	Admin	Reports	Help									
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Admi	n > Organization	Maintenance	> Maintain Or	ganization									Full	Screen Options
Main	ntain HQ Organ Back Address I Business Partner F	lization - Or Relationship Relation: (Has	ganization I Status Reporting Shi	p <u>-To</u> ▼										
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	时。Business Par	tner (Name/C	ity State, BP N	umber)		E Busin	ess Partner (N	Name/City Sta	ste. BP Number	r)	1			
		*)			4 Accign Unassign		D			4				
Sub	omit													
2														

Click (the Select button) beside the appropriate business partner to unassign a relationship with the selected business partner. In this example, (b) (4)
 (b) (4) is selected.

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(Note) The business partners are listed in alphabetical order. Use the vertical scrollbar to find the appropriate business partners.

To select multiple business partners:

- If the business partners are listed in consecutive rows, hold down the **Shift** key and click the first and last selection buttons.
- To select business partners from non-consecutive rows, hold down the Ctrl key while clicking each selection button.

(All)



(Note) To filter the list of Business Partners click on the column Business Partner

(Name/City State, BP Number) field. Select User-Defined Filter...) (the User-Defined Filter....) (the User-Defined Filter...) (the U

To remove the filter, select the (AII) option.

11. Click Unassign (the Unassign button) to remove a relationship between the HQ and the selected business partner.





12. Click (the Select button) beside the appropriate business partner to assign a relationship with the selected business partner. In this example, (b) (4) is selected.





- **13.** Click Assign the Assign button) to create a new relationship between the HQ and the selected business partner.
- **14.** Go to Step **7**.



Namego Users Master Cats Organization Maintenance A laiten PC pranization - Organization ID: Oddress Patrian HC Organization - Organization ID: Oddress Patrian Robinson: Has Reporting Ship-To Patrian Consense Patrian: Business Patrian: Noneso City Oldre, D'Phonder: Business Patrian: Business Patrian:<	Home Operations Finance Admin Reports	Help	
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Address Relationable Relationable Relationable	Admin > Organization Maintenance > Naintain Organization		Full Screen Options
	Maintain HQ Organization - Organization ID; (b) (4) CrEex Address Relationship Datus Rusiness Partner Relation: Has Reporting Ship-To Assigned Business Partners Cr Business Partner (Norme/City State BP Normber) (b) (4) Submit	Available Business Partners	

15. If necessary, click Status (the Status tab) to activate or inactivate an HQ.

Image: Maintain HQ Organization (Status) Screen





16. If necessary, click (the **Inactive** checkbox) to select and inactivate the existing HQ.



(Note) If \Box (the **Inactive** checkbox) is selected, deselecting it will make the HQ active. Also, the date from the **Inactivated On** field will be cleared automatically, as the organization is not inactive anymore.

Image: Maintain HQ Organization (Status) Screen

Home Operation	s Finance	Admin Re	ports Help			
Manage Users Mas	ster Data Org	anization Mainten	ince			
Admin > Organiza	ation Maintenance	> Maintain Organiza	ition			Full Screen Options *
Maintain HQ Or Constant Acthese Inactive: Inactive: Inactive: Comments:	ganization - Org Relationship kbox to inactivate	Status Status the organization.) (4)			
Bubmit						

17. If necessary, enter any business reasons for active/inactive change in the **Comments** field. In this example, no reason was entered.



18. Return to Step 7.



Image: Maintain HQ Organization (Status) Screen

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Matematin HC Organization - Organization II: (b) (d) Active: Pathorship Sale: Sale: <	Admin > Organization Maintenance > Naintain Organization	Full Screen Optio
Submt	Maintain HG Organization - Organization ID (b) (4)	
	Submit	

19. Click Submit (the Submit button) to save the modifications.



(Note) A confirmation message displays: "Business Partner XXXXXX updated successfully."



Image: Maintain HQ Organization (Status) Screen

Manage Users Master Defa Organization Naintenance Admn > Crganization Wantenance > Maintain Organization Full Screen Bisness Partner 000003848 updeted successfully Maintain HQ Organization = Organization ID: (D) (4) Address Relatorship Satus Select the checkots to inactivate the organization. Incidivate 0: Maintain HQ Organization = Organization Maintain HQ Organization = Organization Incidivate 0: Maintain HQ Organization Maintain HQ Organization = Organization Incidivate 0: Maintain HQ Organization Maintain HQ Organization = Organization Incidivate 0: Maintain HQ Maintain HQ Organization Incidivate 0: Maintain Maintain HQ Organization Maintain Satus Maintain Satus Satus Satus Maintain HQ Organization Maintain Satus Satus Satus	Home Operations Finance Admin Reports Help	
Admn > Crganzation Mantenase > Naintan Organization (Janage Users Master Data Organization Naintenance	
Business Partner 0000003348 updated successfully	Admin > Organization Maintenance > Naintain Organization	Full Screen Option
	Business Partner 000000348 updated successfully Maintain IIQ Organization - Organization ID (D) (4) Construction Address Relatorship Status Select the checktox to inactivate the organization. Inactivate (P Inactivated 00: (9415/2021 Comments:	
	Submit	

20. The transaction is complete.



RESULT

An existing HQ Organization has been reviewed and updated as applicable, including:

- Contact information
- Business partner relationship(s)
- Active or Inactive status