

# PROCESS OVERVIEW

#### Purpose

The purpose of this transaction is for State Distributing Agencies (SDAs) and Indian Tribal Organizations (ITOs) who place multi-food orders in WBSCM to establish non-delivery dates (dates when they will not be able to receive deliveries from the national warehouse). Using this transaction, an SDA or ITO may also display their current delivery calendar including all delivery and non-delivery dates and times already established in WBSCM.

#### Process Trigger

Use this procedure to display your warehouse delivery schedule and to set up non-delivery dates.

#### Prerequisites

None.

#### 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, performing 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 Web-Based Supply 0	/ Agriculture Ihain Management	Welcome KY OrderManager	Log Off	WBSCM
Home Operations Admin R	eports Help			
Order Processing				
Maintain National Warehouse Delivery C	alendar			I Back Forward
Detailed Ravigation	Selection/Source Delivery Calendar			
Diffe Uploads/Downloads     Catabay Names and the second sec	Organization: * 0004000038 K/P Dept of Apricuture * Sha-Ta Coastion * (1) (4) (4) Program - C Calendar Start Data *			
Portal Favorites				
4				
Danie		V Tr	usted sites	€ 100% ·

2. Click **I** (the **Hide Navigator** button) to minimize the Portal menu. Note that you can do this with any transaction in WBSCM - not just fulfillment transactions.



Home Operations Admin Reports Help Order Processing		
Order Processing		
mantari wanonai warenouse beiwery Laiendar		I BACS Horward -
Selection/Source Delivery Calendar		
Organization: * 0002000033 KY Dept of A provident (* Shig-To Leaster): * 00000000 KY Dept of A provident (* Program: * 1010 Calendar Start Dete: *		

3. In the Organization field, click 🐷 (the Dropdown button) to select the name of your SDA/ITO.

For this example, we selected (the **0004000038: KY Dept. of Agriculture** option) from the list to set up non-delivery dates for the Kentucky Department of Agriculture.



Used States Department of Agriculture Web-Based Supply Chain Management	Welcome KY OrderManager	Log Off	WBSCM
Home Operations Admin Reports Help			
Under Processing Maintain National Warehouse Delivery Calendar			1 Dack Forward
Selection/Source Delivery Calendar			
Organization: * Ship-To Location: * Program: * Calender Start Date: *			

4. In the Ship-To Location field, click 🔀 (the Dropdown button) to select a ship-to location.

For this example, we selected the

ption.



United States Department of Agriculture Web-Based Supply Chain Management v	ielcome KY OrderManager		Ŵ
Home Operations Admin Reports Help			
Under Processing Maintain National Warehouse Delivery Calendar		Back Forward	
Selection/Source Belivery Calendar			
Organization: * 000400003 KV Opt. of Apriculture * Ship-To Location: * (2) (4) Program: * (2) Calendar Start Date: * (3)			
	Trusted	sites 100%	·

5. Click (the Matchcode button) next to the Program field to select a program from a list of your associated programs.



(Note) You can enter the program abbreviation directly into the field. For example, CSFP.



Unted States Department of Agriculture Web-Based Supply Chain Management		WBSCM
Home Operations Admin Reports Help		
Order Processing		
Maintain Itational Warehouse Belivery Calendar		1 Back forward 🗮
Selection/Source Delivery Catendar National Warehouse Delivery C		
Organization: * 0004000008 KV/Dept of Ap		
Shp-To Lecation: (b) (4)		
Program · PD FOR		
Celendar Start Bate: 1 R		
KININ KOW 1012 MILLS		
DK Cencel		

6. Click (the Blue Box) next to the appropriate program option. In this case, we selected the CSFP option.





7. Click OK (the OK button) to select the highlighted program.



United States Department of Agriculture Web-Based Supply Chain Management	Welcome KY OrderManager	Log Off	WBSCM
Home Operations Admin Reports Help			
Order Processing			
Maintain National Warehouse Delivery Calendar			Back Forward
Selection/Source Belivery Calendar			
Organization:* 000400033 XV Dept of Agriculture *			
Ship-Te Location: * (b) (4)			
Program."			
Calendar Start Date: * R			
October 2012     Find Su			
88 24 29 26 27 28 29 30 40 4 2 2 3 4 5 5 7			
41 6 9 10 11 12 13 14			
42         15         10         17         18         19         20         21           435         22         23         24         26         27         28			
<b>44</b> 29 30 91 1 2 3 4			
The second	1.	arted star	# 100H *

8. Click 🗊 (the Calendar button) next to the Calendar Start Date field to select the date from the calendar.





United States Department of Agriculture Web-Based Supply Chain Management	Welcome KY OrderManager	Leg.Off WBSCM
Home Operations Admin Reports Help		
Order Processing Maintain Rational Warehouse Delivery Calendar		I Back Forward
Patention Rolling Advantar		
Determination: 1 0004000033 90/ Deat of Antiputure W		
Ship-Te Location: * (b) (4)		
Program * CSFP		
Calendar Start Date: * 110/23/2012 IEI		
vascriptvod(00);	🗸 Tru	ted sites 🔍 100% +

**9.** Click **Go** (the **Go** button) to display a calendar that corresponds to the Organization, Ship To Location, Program, and Calendar Start Date listed in your criteria.





**10.** Scroll to the bottom of the screen. You will be able to see the current delivery calendar. Dates when you can receive deliveries at any time during the day are indicated in light blue. Dates when you can receive AM deliveries are indicated in yellow. Dates when you can receive PM deliveries are indicated in green. Non-Delivery Dates are indicated in red.



United States Department of Agriculture Web-Based Supply Chain Management	Welcome KY OrderManager	Log Off	WBSCM
Home Operations Admin Reports Help			
Order Processing			
Maintain National Warehouse Delivery Calendar			Back Forward
Selection/Source Delivery Calendar			
Organization:* D004000038 KY Dept			
Ship-To Locator.*			
Program.*			
Gelender Start Date: * 1502320912			
Repeat On			
Day of Week: 01 Frequency: 01 Start Date: 10 Add			
Calendar			
	Previous Year Next year >		
Date functions: (K Non-Delivery Dates			
Image: Construction of			
Save Charges) Cancel Changes (Back to Selection)			

11. Click 🖾 (the Matchcode button) next to the Day of the Week field to select a non-delivery day of the week or enter the day directly into the field.

As required, complete/review the following fields:

Field	R/O/C	Description
Day of the Week:	R	Day of week when you do not want to receive deliveries. This could be a recurring date (i.e. I do not want to receive deliveries on any Tuesday in the winter) or one-time dates (i.e. I do not want to receive deliveries on Tuesday, the 30th of October).
		Example: Tuesday





12. Click (the Blue Box) next to the appropriate day option. In this case, we selected the **Tuesday** option.





**13.** Click OK button) to select the highlighted day.



Unied States Department of Agriculture Web-Based Supply Chain Management	Welcome KY OrderManager	Leg.Off	WBSCM
Home Operations Admin Reports Help			
Order Processing			
Maintain National Warehouse Delivery Calendar			I Back Forward
Selection/Source Delivery Calendar			
Organization * 0004000005 KV Dent			
Ship-To Location · (b) (4)			
Program * CSFP			
Calendar Start Date: * 10/23/2012			
(30)			
Repeat On			
Day of Week: TUESDAY			
Calendar	· · · · · · · · · · · · · · · · · · ·		
	Previous Year Next year		
Date functions: @ Non-Delvery Dates			
€         October 2012         November 2012         December 2012         >           Molf all with the reliant of			
ALL Day AM In Delivery Date			
Save Changes   Cancel Changes   Back to Selection			
kone		rusted sites	€ 100% ·

14. Click (the Frequency text box) to enter the frequency. In this case, we entered 08 in the text box.

As required, complete/review the following fields:

Field	R/O/C	Description
Frequency	R	Frequency of Tuesdays when you do not wish to receive deliveries. For example, we entered 8 in this field, which will block off the next 8 Tuesdays, so that we do not receive deliveries on those dates.
		Example: 8



USDA Web-Based Supply Chain Management	Welcome KY OrderManager	Log Off	WBSCM
Home Operations Admin Reports Help			
Order Processing			
Maintain National Warehouse Delivery Calendar			I Back Forward
Selection/Source Delivery Calendar			
Organization.* 0004000003 KY Dept			
Ship-To Location • (b) (4)			
Program.* C2PP Calendar Start Date * 18/02/2017			
Repeat On			
Day of Week: TUESDAY			
Calendar			
	Previous Year Next year		
Date functions: Rion-Delivery Dates			
4         October 2012         November 2012         December 2012         December 2012         Participation           M6         Tal weight         M6         Tal weight         Tal weight <td< th=""><th></th><th></th><th></th></td<>			
ALL Day			
PM Non Delivery Date			
Save Changes Cancel Changes Back to Selection			
J cone		Trusted sites	€ 100% ·

**15.** Click (the **Start Date** text box) to enter the start date orclick the calendar icon to select a date from the calendar. In this case, we entered 10/23/12.

As required, complete/review the following fields:

Field	R/O/C	Description
Start Date	R	Date when the non-delivery dates should start. By entering 10/23/2012 in this field, we have indicated that the eight Tuesdays following 10/23/2012 will be blocked out as non-delivery dates.
		Example: 10/23/2012





**16.** Click Add button) to add the new non-delivery dates to the calendar.





17. After adding any non-delivery dates click Save Changes (the Save Changes button) to save your changes.





United States Department of Agriculture Web-Based Supply Chain Management	Welcome KY Order	Manager Log Off	WBSCM
Home Operations Admin Reports Help			
Order Processing			
Maintain National Warehouse Delivery Calendar			Back Forward
Changes Saved Successfully			3
Selection/Source Delivery Calendar			
Organization: * 0004000000 KY Dept.s. **			
Ship-To Locaton: * (b) (4)			
Program * CSEP			
Calendar Start Date: * 102/32/012			
Repeat On			
Day of Week: TUESDAY			
Calendar			
	C Previous Year Next year P		
Date functions: @ Non-Delivery Dates			
Cobbier 2012         November 2012         December 2012         >           Mill Tal wirk finn finn sei und fann fann sei und fann finn sei und fann finn sei und fann fann sei und fan			
1         2         3         4         1         1         3         4         5         6         7         6         1         8         1         2         3         4         5         6         7         6         0         3         4         5         6         7         0         0         3         4         5         6         7         0         0         3         4         5         6         7         0         0         3         4         5         6         7         0         0         3         4         5         6         7         0         0         3         4         5         6         7         0         0         3         4         5         6         7         0         0         3         4         5         6         7         0         0         3         4         5         6         7         0         0         3         4         5         6         7         0         0         3         4         5         6         7         0         0         0         0         0         0         0         0         0			
ALL Day AM			
m rw in bervery bare			
Save Changes Cancel Changes Back to Selection			-
			-

**18.** Confirmation Message Displays.



Home       Operations       Admin       Reports       Help         Order Processing       Complaint Administration       Recall Administration         Maintain National Warehouse Delivery Calendar       I Book ForuMol 2         Organization       I Book ForuMol 2         Organization       I Book ForuMol 2         Program       I Book ForuMol 2         Calendar       I Book ForuMol 2         Repeat On       Date ForuMol 2         Date ForuMol 2       I Book ForuMol 2         In Development       I Book ForuMol 2 <th>USDA United States Department of Agriculture Web-Based Supply Chain Management</th> <th>Welcome KY User</th> <th>LOG OFF WBSCM</th>	USDA United States Department of Agriculture Web-Based Supply Chain Management	Welcome KY User	LOG OFF WBSCM
Order Processing Complaint Administration     Recall Administration     Recall Administration     Recall Administration     Recall Administration     Complaint Administration     Recall Administration     Selection/Source Delivery Calendar     Organization     Organization     Sole To Location     Repeat Dn     Date Torretory Date     Repeat Dn     Date Torretory Date     Calendar     Control     Prevolues Year     Non-Thor 2012     Date Torretory Date     Calendar     Control     Prevolues Year     Recall Administration     Recall Administration     Recall Administration     Calendar     Calendar     Control     Prevolues Year     Recall Administration     Recall Administration     Calendar     Control     Prevolues Year     Recall Administration     Recall Administration     Recall Administration     Calendar     Calendar     Calendar     Control     Prevolues Year  <	Home Operations Admin Reports Help		
Repeat Dn         Repeat Dn           Day of Week:              • Frequency:             • 0:             • 1000000000000000000000000	Order Processing Complaint Administration Recall Administration		i i i i i i i i i i i i i i i i i i i
Selection/Source Delivery Calendar         Organization:*         Stip:To Location         Stip:To Location         Organization:*         Stip:To Location         Stip:To Location         Organization:*         Stip:To Location         Organization:*         Stip:To Location         Calendar:         Calendar:         Calendar:         Calendar:         Calendar:         Calendar:         Calendar:         State St	Maintain National Warehouse Delivery Calendar		Back Forward
Crossication: * 00000000000000000000000000000000000	Selection/Source Delivery Calendar		
Urganization: Ship To Learning To Parameter F Frequency: Calendar: Calenda			
Ship' of Locking (2) (2)         Calender Shirt Date:       (10)         Repeat On       (10)         Day of Week:       (10)         Calender Shirt Date:       (10)         Calender Shirt Date:       (10)         Day of Week:       (10)         Frequency:       (11)         Date functione:       (11)         (11)       (12)       (12)         Mis Taxine The Term Shire       (12)         (12)       (12)       (12)         (12)       (12)       (12)         (13)       (12)       (14)       (12)         (13)       (12)       (14)       (12)         (13)       (12)       (14)       (12)       (14)         (14)       (12)       (14)       (12)       (14)         (13)       (14)       (15)       (14)       (15)       (14)       (15)         (14) </td <td>Organizator: * 1000400003 RV deot. 1#</td> <td></td> <td></td>	Organizator: * 1000400003 RV deot. 1#		
Program       Calendar:         Repeat Dn       Image: Calendar:         Calendar:       Image: Calendar:         Calendar:       Image: Calendar:         Calendar:       Image: Calendar:         Calendar:       Image: Calendar:         Image: Calendar:       Image: Calendar:	Ship-10 Lacabon		
Calendar	Calendar Dari Date 1 10/02/012		
Repeat On         Operative         Image: Calendar           Calendar         Image: Calendar         Image: Calendar         Image: Calendar           Date: Transmitting: Tra	Go		
Repeat On       Day of Week:       Calendar       Calendar       Calendar       G Non-Deticery Dates       4     Docomber 2012       Mon Weet Tile Tile Bas Weet Tile Bas Weet Tile Tile Bas Weet Tile Bas Weet Tile Tile Bas Weet Tile Tile Bas Weet			
Day of Week:     Image: Second s	Repeat On		
Calendar         Inventor         Date functions: (a) Non-Devicery Dates         Next year         Next year <t< td=""><td>Day of Week: Trequency: 01 Start Date: Add</td><td></td><td></td></t<>	Day of Week: Trequency: 01 Start Date: Add		
Martyon: *       November 2012       November 2012   <	Calendar		
Date functional (*) Non-Derivery Dates       November 2012       Descenter 2012       Descenter 2012         ***       Statuber 2013       November 2012       Descenter 2012       Mod The War The Wa		Previous Year Next year	
A* Hon-Derlivery Dates         4* Documentary Dates         100 Data leve: Thir Pic leve base         100 Data leve base         100 Data leve:	Date functions		
4     Social Science     November 2012     December 2012       Mon     Mail	Non-Delivery Dates		
No. Turi Viete: Thi Tiel Sing         No. This Turi Viete: Thi Tiel Sing         No. Turi Viete: Thi Tiel Sing         <	Dictober 2013 November 2012 December 2012		
iii       iii       iii       iii       iii       iii       iii       iii       iiii       iiii       iiii       iiiii       iiiiii       iiiiiiii       iiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiii	Mo Tu We Thi Fri Sa Su Mo Tu We Thi Fri Sa Su No Tu We Thi Fri Sa Su		
Sc     Tel       Acc     Tel       Acc     Tel       Acc     Tel       Acc     Tel       Acc     Tel       Acc     Tel       Acc     Tel       Acc     Tel     Tel     Tel     Tel     Tel     Tel     Tel     Tel     Tel       Acc     Tel     Tel     Tel     Tel     Tel     Tel     Tel     Tel     Tel	40 1 2 3 4 0 0 7 44 28 30 31 1 2 3 4 63 28 27 28 28 50 1 2 41 8 9 10 11 12 13 14 45 5 5 7 8 9 10 11 48 3 4 5 5 7 8 9		
41       202       203       24       25       40       200       21       24       55       41       41       10       100       21       22       23         42       20       27       30       1       3       2       30       1       20       24       25       20       24       25       20       24       20       27       20       27       20       27       30       1       10       24       20       27       24       20       27       24       20       27       24       20       27       24       20       27       24       20       27       24       20       27       24       20       27       24       20       27       24       20       27       24       20       27       24       20       27       24       20       27       24       20       27       24       20       27       24       20       27       24       20       27       28       20       27       20       27       20       27       20       27       20       27       20       27       20       27       20       27 <td< td=""><td>42 18 18 17 18 19 20 21 48 12 13 14 18 16 17 18 50 10 11 12 13 14 15 16</td><td></td><td></td></td<>	42 18 18 17 18 19 20 21 48 12 13 14 18 16 17 18 50 10 11 12 13 14 15 16		
46     29     90     51     1     2     3     4     10     10     17     18     19       46     5     0     7     8     9     1	45 22 25 24 25 26 27 28 47 13 20 21 22 23 24 25 51 17 18 19 20 21 22 23		
ALL Day AM	44 29 30 31 1 2 3 4 65 26 27 28 29 30 1 2 62 24 25 25 29 30 45 5 6 7 8 9 10 11 49 3 4 5 6 7 8 9 1 31 1 2 3 4 5 6		
PA Decomposition of the second s	au 0		
	PM Non Delivery Date		

**19.** You can select individual non-delivery dates by clicking the dates directly on the calendar. The day will turn orange to identify that it has been selected. If you select multiple dates on the calendar this way, the previously selected date will change back to its initial status color.

In this case we clicked 29 (the 29th day).



(Note) Refresh the calendar when finished to confirm your changes (Steps 20-23).



USDA Web-Based Supply Chain Management	Welcome KY User	Long Of WBSCM
Home Operations Admin Reports Help		
Order Processing Complaint Administration Recall Administration		
Maintain National Warehouse Delivery Calendar		Back Forward
Selection/Source Delivery Calendar		
Organization.* 0004000038 KY dept.		
Ship-To Location: (b) (4)		
Program *		
Calendar Start Date: * 10/23/2012		
Go		
Repeat On		
Dave of Works Discussion of Shart Date Discussion		
Day of Week, D. Prequency, of Start Date. 82 Moo		
Calendar		
	Rievious Year Next year 🕨	
Date functions: Non-Delivery Datee		
4 Flathan 7013 Hausshar 7013 Ranambar 7013 k		
Mo Tu We Th Fr Se Su Mo Tu We Th Fr Se Su Mo Tu We Th Fr Se Su		
40 1 2 3 4 5 6 7 44 25 80 31 1 2 3 4 45 20 27 28 29 30 1 2		
42 15 18 17 18 19 20 21 48 12 13 14 15 16 17 18 50 10 11 12 13 14 15 16		
43 22 23 24 25 26 27 28 47 19 20 21 22 23 24 25 51 17 18 19 20 21 22 23		
44 29 30 31 1 2 3 4 43 26 27 28 29 30 1 2 5 20 27 28 29 30 1 2 5 20 27 28 29 30		
ALL Day AM		
Save Changes Cancel Changes Back to Selection		

20. We clicked <sup>30</sup> (the 30th day) to be non-delivery date. Notice that the 29th is no longer orange.

Click Save Changes (the Save Changes link).



USDA United States Department of Agriculture Web-Based Supply Chain Management Welcome KY	
Home Operations Admin Reports Help	
Order Processing   Complaint Administration   Recall Administration	
Maintain National Warehouse Delivory Calendar	Back Forward
Selection/Source Delivery Calendar	
organization (b) (4)	
Program * CSP	
Calendar Start Date: * 10/23/2012	
<u>Ge</u>	
Repeat Dn	
Day of Week: 01 Start Date: 01 Add	
Calendar	
Previous Year Next year	
Date functions:	
© Non-Delicery Dates	
October 2012 November 2012 December 2012	
Mo Tul Wa Thi Fir Sa Su	
<b>41 8 9 10 11 12 13 14 45 5 9 7 8 9 10 11 49 3 4 5 6 7 8 9</b>	
ALL Day AM	
PN/ Non Delivery Date	
Save Changes Cancel Changes Back to Selection	_

21. Click Back to Selection (the Back to Selection link).



USDA Web-Based Supply Chain Management	Welcome KY User	Log Off	WBSCM
Home Operations Admin Reports Help			
Order Processing Complaint Administration Recall Administration			
Maintain National Warehouse Delivery Calendar			Back Forward
Selection/Source Delivery Calendar			
Organization: * [0004000028 KY Dept. of Agriculture * Ship-Te Lecabor: * (b) (4)			
Calendar Start Date: 10/23/2012 JT			

22. Click Go link) to refresh the calendar.



USDA United States Department of Agriculture Web-Based Supply Chain Ma	nagement		Welcome KY User	Log Off	WBSCM
Home Operations Admin Reports	Help				
Order Processing Complaint Administration	Recall Administration				
Maintain National Warehouse Delivery Calendar				1	Back Forward
Selection/Source Delivery Calendar					
Construction - Descention and Const					
Shir To Leasting (b) (4)					
Ship-to Eucano					
Calendar Start Cale 7 10723/2812					
Cat					
terret,					
Repeat On					
Day of Week: Frequen	cyc 01 Start Date:	Add			
Calendar					
		Previous	Year Next year 🕨		
Date functions: Non-Delivery Dates					
October 2012 November 2	012 December 2012 +				
Mo Tu We Th Fr Ba Su Mo Tu We Th	Fr. Sa Su Mo Tu We Th Fr Ba Su				
40 1 2 3 4 5 6 7 44 28 30 31 1 41 8 9 10 11 12 13 14 45 5 8 7 8	2 3 4 68 20 27 28 28 30 1 2 9 10 11 49 3 4 5 6 7 8 9				
42 15 18 17 18 19 20 21 48 12 13 14 15	16 17 18 50 10 11 12 13 14 15 16				
43 22 23 24 25 26 27 28 47 19 20 21 22	23 24 25 51 17 18 19 20 21 22 23				
45 5 5 7 8 9 10 11 49 3 4 5 5	7 8 9 1 31 1 2 3 4 5 5				
ALL Day					
PM Non Delivery	Date				
Save Changes Cancel Changes Back to Selection					

**23.** Notice that the **29th** and the **30th** are both indicted as non-delivery dates. The **30th** will change from orange to red when the next non-delivery date is selected.

You have completed this transaction.



Use the same process to remove non-delivery dates. (Click the non-delivery date and it will turn orange. Save your changes and refresh the calendar. The date will change to white, which signifies no status.)



# RESULT

The transaction has been successfully completed.



# PROCESS OVERVIEW

#### Purpose

The purpose of this transaction is for SDA/ITO Recall Specialists to fill out and submit the Recall Survey Response Form on behalf of their RAs and Ship-Tos. This form is generated in WBSCM to account for all inventory that is being recalled. This procedure describes the steps to access and submit findings for a recall. SDA/ITOs should communicate all recall information with their RAs and Ship-Tos.

#### **Process Trigger**

Use this transaction to display, complete, modify, or submit a response form on behalf of the organization and suborganizations in WBSCM.

#### Prerequisites

- Recall case must exist in WBSCM.
- Current date must be before the response deadline.
- SDA/ITO accessing the form must be assigned to the recall case.
- Recall Specialists and Recall Contacts have at least 2 Recall Communication Methods set up in their User Profile.

#### Portal Path

Follow the Portal path below to complete this transaction:

• Select Operations tab → Recall Administration folder → Access Recall Survey Response Form link to go to the Access Recall Survey Response Form 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, etc.



# PROCEDURE

1. Start the transaction using the following Portal path: **Operations** tab **→ Recall Administration** folder **→ Access Recall Survey Response Form link**.

Image: Access Recall Survey Response Screen

	a.							
		Operations >	Recall Ad	ministration > Access Recall Survey Response Form	1		Full Screen	Options
Access Recall Su Display FNS Rec	urvey Response F all	Welcome 1	o the F	ecall Survey Response Form				
View Business P	artners Impact	Organization		<u> </u>				
		Sold-to party:	4000578	Name: (b) (4)				
		List of Recal	Respons	68				
		Note: Select a	ny row belo	ow to view the details of that response.				
		Case ID	Product	Product Description	Vendor	Vendor name	Response si	atus L
		135	100428	PASTA MACARONI PLAIN ELBOW PKG-24/1 LB	1010109		Complete	1
		135	100008	CHEESE CHED RDU FAT YEL CUTS-4/10 LB	4005792		In-Process	1
		42	100397	PEANUT BUTTER SMOOTH DRUM-500 LB	1000750			1
		131	100428	PASTA MACARONI PLAIN ELBOW PKG-24/1 LB	1002497		In-Process	1
		136	100428	PASTA MACARONI PLAIN ELBOW PKG-24/1 LB	1002497		In-Process	1
		135	100008	CHEESE CHED RDU FAT YEL CUTS-4/10 LB	1010109		Complete	1
		135	100428	PASTA MACARONI PLAIN ELBOW PKG-24/1 LB	1002497			_1
		42	100397	PEANUT BUTTER SMOOTH DRUM-500 LB	1000286			1
		42	100397	PEANUT BUTTER SMOOTH DRUM-500 LB	1000251			1
		91	100158	BEEF FINE GROUND FRZ CTN-40 LB	1000634			0

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



#### Image: Access Recall Survey Response Screen

0 month of								
organization								
Sold-to party:	4000578	Name (b) (4)						
List of Recal	Respons	es						
Note: Select a	ny row belo	w to view the details of that response.						
Case ID	Product	Product Description	Vendor	Vendor name	Response status	Last update		
136	100428	PASTA MACARONI PLAIN ELBOW PKG-24/1 LB	1010109		Complete	11/15/2017		
135	100008	CHEESE CHED RDU FAT YEL CUTS-4/10 LB	4005792		In-Process	11/16/2017	-	
42	100397	PEANUT BUTTER SMOOTH DRUM-500 LB	1000750			10/11/2012		
131	100428	PASTA MACARONI PLAIN ELBOW PKG-24/1 LB	1002497		In-Process	11/15/2017		
136	100428	PASTA MACARONI PLAIN ELBOW PKG-24/1 LB	1002497		In-Process	11/16/2017		
135	100008	CHEESE CHED RDU FAT YEL CUTS-4/10 LB	1010109		Complete	11/16/2017		
135	100428	PASTA MACARONI PLAIN ELBOW PKG-24/1 LB	1002497			11/16/2017		
42	100397	PEANUT BUTTER SMOOTH DRUM-500 LB	1000286			10/11/2012		
42	100397	PEANUT BUTTER SMOOTH DRUM-500 LB	1000251			10/11/2012		
91	100158	BEEF FINE GROUND FRZ CTN-40 LB	1000634			09/20/2013	-	
C View Deta	45							

3. SDA/ITO Recall Specialists use the Access Recall Survey Response Form screen to select recall response forms assigned to their organization by an FNS Recall Specialist.Click (the Vertical scrollbar) to display additional cases as necessary.

Ð

(Note) To ensure the recall is properly communicated, Recall Specialists and Recall Contacts must have at least 2 Recall Communication Methods set up in their User Profiles. Recall Communication Methods may only be set up by the Recall Specialist or Recall Contact on their own profile. For more information on how to configure Recall Communication Methods, refer to the <u>Maintain User Profile</u> work instruction.



(Note) In the *List of Recall Responses* section, **Response Status** refers to the status of the response form, which may be one of the following:

- Open (or blank) Forms that have not been started.
- In-Process Forms that have been saved but not yet submitted by a Recall Specialist. These forms can be accessed and modified by the assigned Recall Specialist at any time. Forms in this stage have not been submitted to the USDA.
- Completed Forms that have been saved and submitted to the USDA, and can be modified only by an FNS Recall Specialist.



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

Field	R/O/C	Description
Case ID	R	A unique identifying number associated with the Hold or Recall case.
		Example: 91
Product	R	Substance or commodity that is bought or sold on a commercial basis, or is used, consumed, or created in production; a product can also be a service. Also, a number identifying a material master record.
		Example: 100158
Product Description	R	Information used to characterize a material.
		Example: (b) (4) Ground Beef -100158 4/10 lb Chubs
Vendor	R	Business partner that provides materials or services.
		<b>Example:</b> 1000634
Vendor name	R	Business partner that provides materials or services.
		Example: (b) (4)
Response status	R	Status of the Recall Survey Response form.
Last update	R	Most recent date for update.
		<b>Example:</b> 09/20/2016



#### Image: Access Recall Survey Response Screen

Velcor	me to the	Recall Survey Response Form						
Organiz	ation							
Sold-to p	arty: 4000578	Name (b) (4)	]					
List of I	Recall Respor	808						
Note: Se	lect any row be	low to view the details of that response.						
Ca	se ID Produc	Product Description	Vendor	Vendor name	Response status	Last update	-	
135	10000	CHEESE CHED RDU FAT YEL CUTS-4/10 LB	1010109		Complete	11/16/2017		
135	100428	PASTA MACARONI PLAIN ELBOW PKG-24/1 LE	1002497			11/16/2017		
42	100397	PEANUT BUTTER SMOOTH DRUM-500 LB	1000286			10/11/2012		
42	100397	PEANUT BUTTER SMOOTH DRUM-500 LB	1000251			10/11/2012		
91	100158	BEEF FINE GROUND FRZ CTN-40 LB	1000634			09/20/2013		
112	100348	CORN FRZ CTN-30 LB	1000550		Complete	06/06/2016		
112	100351	BEANS GREEN FRZ CTN-30 LB	1000550		Complete	06/06/2016		
122	10000	CHEESE CHED RDU FAT YEL CUTS-4/10 LB	4005792		Complete	08/22/2017		
133	100496	RICE US#1 MEDIUM GRAIN BAG-25 LB	1010109			11/13/2017		
137	100496	RICE US#1 MEDIUM GRAIN BAG-25 LB	1002497			11/14/2017	-	
🖨 Viev	Details							

5. Click (the Selection box) next to Case ID "91" to display the Access Recall Survey Response Form.



(Note) The *Response Header* section identifies the product, vendor, and other details about the recall. The Recall Specialist enters disposition quantities for the recalled product and related information in the *Product Inventory / Disposition* section.



#### Image: Access Recall Survey Response Form Screen

or	ganization							
Sol	I-to party:	4000578	Name: (b) (4)	1				
Lis	t of Recall	Respons	Ca					
Nat	Select ar	w row bek	w to view the details of that response					
	Case ID	Product	Product Description	Vendor	Vendor name	Response status	Last update	-
	135	100008	CHEESE CHED RDU FAT YEL CUTS-4/10 LB	1010109		Complete	11/16/2017	
	135	100428	PASTA MACARONI PLAIN ELBOW PKG-24/1 LB	1002497	(h) (/		11/16/2017	1.2
	42	100397	PEANUT BUTTER SMOOTH DRUM-500 LB	1000286			10/11/2012	
	42	100397	PEANUT BUTTER SMOOTH DRUM-500 LB	1000251			10/11/2012	-
	91	100158	BEEF FINE GROUND FRZ CTN-40 LB	1000634			09/20/2013	
	112	100346	CORN FRZ CTN-30 LB	1000550		Complete	06/06/2016	
	112	100351	BEANS GREEN FRZ CTN-30 LB	1000550		Complete	06/06/2016	
	122	100008	CHEESE CHED RDU FAT YEL CUTS-4/10 LB	4005792		Complete	08/22/2017	
	133	100496	RICE US#1 MEDIUM GRAIN BAG-25 LB	1010109			11/13/2017	
	137	100496	RICE US#1 MEDIUM GRAIN BAG-25 LB	1002497			11/14/2017	-
-	View Deta	ils						

# 6. Click View Details (the View Details button).

# Image: USDA Recall Response

all Administration		
Operations > Recall Administra	ion > Access Recall Survey Response Form	Full Screen Options
Pacall Survey Pernor	se Form: Inventory and Disposition Details	
tecan survey tespor	se i onni. Inventory and Disposition Details	
Response Header		
🕼 Back 📙 Save 😓 Sul	nit to USDA	
Case: 91	(b) (4) round Beet-100156 4/10 lb Chubs	)
Sold To Organization: 4000	(b) (4)	
Product 1001	8 BEEF FINE GROUND FRZ CTN-40 LB	
Vendor. 1000	<sup>34</sup> (b) (4)	
Response Status:		
Response Last Updated: 09/2	2013	
Response Deadline: 09/3	2013	
Product Inventory and Dispo	ition	
Unit of Me	isure CS	
Quantity of products re	sived: 2,000.000	
Quantity served prior to	ecall: 0.000	
Quantity or	hand: 2,000.000	
Quantity on hold or returned to v	0000 0000	
Quantity des	pyed 0,000	
Quantity unaccoun	d for: 2,000.000	
Destruction documentation	n tie:	
Comment for unaccounted p	oduct	
Number of illnesses or i	uries: 0	



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

Field	R/O/C	Description	
Product	R	Substance or commodity that is bought or sold on a commercial basis, or is used, consumed, or created in production; a product can also be a service. Also, a number identifying a material master record.	
		Example: 100158	
Product Description	R	Information used to characterize a material.	
		Example: (b) (4) Ground Beef - 100158 4/10 lb Chubs	
Response Status:	R	Status of the Recall Survey Response form.	
Response Deadline:	R	Designated deadline for SDA to provide a completed Recall Survey Response form. Example: 09/30/2013	
Unit Of Measure:	ĸ	Example: CS	
Quantity of products received:	R	Number of items received by RA/Ship-to. Example: 2,000.00	
Quantity served prior to recall:	0	Quantity of product that was served prior to the recall being issued. Example: 100	
Quantity on hand:	R	Quantity of product that is currently on hand based on the most recent inventory count. Example: 2,000.00	



Field	R/O/C	Description
Quantity on hold or returned to vendor:	0	Quantity of product that is currently on hold or has been returned to the vendor.
		Example: 50
Quantity re-donated:	0	Quantity of product that has been or will be re-donated to another organization.
		Example: 20
Quantity destroyed:	0	Quantity of product that has been or will be destroyed. Example:

## 8. Perform one of the following:

lf	Then
A record of the quantities being destroyed is on file	Click $\square$ (the <b>Destruction documentation on file</b> checkbox).
There is no record of the quantities being destroyed on file	Go to Step 10.



(Note) The Recall Specialist enters disposition quantities for the recalled product in the *Product Inventory / Disposition* section.



# Image: Access Recall Survey Response Form Screen

Operations > Recall Adm	nistration > Access Recall Survey Response Form	Full Screen Option
Recall Survey Res	oonse Form: Inventory and Disposition Details	
Response Header		
Save 🔛 Save 🖟	Submit to USDA	
Case:	81 (b) (4) Bround Beef -100158 4/10 lb Chube	ï
Sold To Organization:	4000578 (b) (4)	
Product	100158 BEEF FINE GROUND FRZ CTN-40 LB	
Vendor:	1000634 (b) (4)	
Response Status:		
Response Last Updated:	09/20/2013	
Response Deadline:	9/30/2013	
Product Inventory and I	sposition	
Unit	of Measure: CS	
Quantity of produ	ts received: 2,000.000	
Quantity served p Quan	ty en hand: 2 000 000	
Quantity on hold or returne	I to vendor: 50	
Quantity	re-donated: 20	
Quantit	destroyed: 10	
Destruction document	tion on the V	
Desiration accuracy		
<b>a</b> 11	ed product:	
Comment for unaccour		
Number of illnesse	or injuries: 0	

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

Field	R/O/C	Description
Comment for unaccounted product:	С	Free form text field to enter a comment for any unaccounted product. (Note) The Recall Specialist must enter a comment in the Comment for unaccounted for product field for all unaccounted for product that is or will be destroyed.
Number of illnesses or injuries:	0	The number of people who reported illnesses or injuries related to the consumption of the product being recalled. Example: 2
Description of Illness or injury:	С	<ul> <li>Free text field used to summarize the symptoms that were experienced by the people who reported illnesses and injuries.</li> <li>(Note) If the recall caused any illnesses or injuries, the Recall Specialist must include the number of injuries in the Number of illness or injuries field and a description of the injuries in the</li> </ul>



Field	R/O/C	Description
		Description of Illness or injury field.

# **10.** Perform one of the following:

lf	Then
The form will be completed later and the user needs to save progress without submitting to USDA	Go to Step 11.
The form is complete and needs to be submitted to the USDA	Go to Step 12.



(Note) Note the three buttons in the *Response Header* section: each button can be used as follows:

- **Back** Returns to the previous screen without saving. Does not save any changes to the form. When reviewing a previously submitted form, the Back button may be the only available option in the toolbar.
- Save Saves progress on the form and changes the status to "In-Process". FNS will be able to view the responses; however the SDA/ITO Recall Specialist can make changes to the form as needed.
- Submit to USDA Submits the form to USDA for review and changes the status to "Complete". At this stage, the SDA/ITO Recall Specialist can no longer edit responses, but an FNS Recall Specialist can make changes as needed.
- 11. Click Save (the Save button) to save the entries.



(Note) After clicking the **Save** button, the status changes to "In-Process" and a message displays "Response Saved / Updated".



#### Image: Access Recall Survey Response Form Screen

	22030/00 0.500.50		
all Administration			
Operations > Recall Adm	inistration > Access R	ecall Survey Response Form	Full Screen   Option
Vour response was up	dated and Saved.		
Response Header	sponse Form: In	ventory and Disposition Details	
C Back 📙 Save 🕻	Submit to USDA		
Case:	91	(b) (4) Ground Beef - 100158 4/10 lb Chubs	
Sold To Organization:	4000578	(b) (4)	
Product	100158	BEEF FINE GROUND FRZ CTN-40 LB	
Vendor:	1000634	(b) (4)	
Response Status:			
Response Last Updated:	07/24/2018		
Response Deadline:	09/30/2013		
Product Inventory and I	Disposition		
Quantity of produ	cts received:	2,000.000	
Quantity served p	nior to recall:	100.000	
Quar	tity on hand.	1,900,000	
Quantity on noid or returns	re-donated	20.000	
Quanti	ty destroyed.	10.000	
Quantity una	ccounted for:	1,820.000	
The state of the s	tation on file: 🔽		
Destruction document		A LOCT IN MARCHOURE, 400 OACEC REINO RECTROVER	

12. Click Submit to USDA (the Submit to USDA button) to submit the form to FNS.



(Note) After clicking the **Submit to USDA** button, the status changes to "Complete" and a message displays "Response Submitted to USDA". Once submitted, the SDA/ITO Recall Specialists will no longer be able to modify the form.

**13.** The transaction is complete.



# RESULT

A response form associated with a recall case assigned to the organization has been submitted.


# PROCESS OVERVIEW

## Purpose

The purpose of this transaction is to upload a bill of lading (BOL) file into WBSCM. A BOL is a packing slip that accompanies the order when it ships. This slip documents the materials, batches, and quantities included in the shipment. National Warehouse users upload a BOL file to create delivery documents and process post goods issue (PGI) for Multi Food orders. Additionally, the uploaded BOL can be exported to a Microsoft Excel file for review.

## Process Trigger

Use this procedure to upload a BOL file into WBSCM.

## Prerequisites

• XML or TXT File for the BOL must exist on the user's workstation or shared drive.

## Portal Path

Follow the Portal path below to complete this transaction:

Select Operations tab → Warehouse Management tab → File Uploads/Downloads folder → Upload BOLs from National Warehouse link to go to the Upload BOLs from National Warehouse 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 → Warehouse Management tab → File Uploads/Downloads folder → Upload BOLs from National Warehouse link.

Image: Upload BOLs from National Warehouse Screen

Home Operations Admin Reports	: Help	
Order Processing Warehouse Management Delivery Management Inventory Management Batch Management File Uploads/Downloads National Warehouse Orders to be Filled	Varehouse Management > File Welcome to Upload Bill of Ladings Please Upload the BOLs from National Wa File Selection Choose File No file chosen	File Uploads/Dov/rifoads > Upload BOLs from National Warehouse Full Screen Options gs from National Warehouse Narehouse to Proceed.
Uproad BOLs from National Warehouse     Uproad National Warehouse Inventory	Bill of Lading Details	Export 2
	EX Bill of Lading Message Type Ref	eference Document Raference Item Delivery Item Material Post Goods Issue Status Mean
	•	

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

Image: Upload BOLs from National Warehouse Screen

alions > Warehouse	e Management > Fi	e Uploads/Downloads > Up	bload BOLs from Nation	nal Warehouse	6			Full Screen	Л
Welcome to Uplo Please Upload the B	ad Bill of Ladings OLs from National W	s from National Wareho arehouse to Proceed.	USe						
File Selection									
Choose File No file	e chosen								
i Submit									
Bill of Ladino Det	ails								
Bill of Lading Det	ails								
Bill of Lading Det View: 6354_Reove	ails efileds 💌 Ex	port <sub>4</sub>						)	. 2
Bill of Lading Det View: 6354_Record	ails efileds Type	Port  Reference Document	Reference Item	Delivery	Item	Material	Post Goods Issue Status	Message Text	2
Bill of Lading Det View: 6354_Reove Bill of Lading	ails efileds Type Message Type	Reference Document	Reference Item	Delivery	Item	Material	Post Goods issue Status	Message Text	2
Bill of Lading Det View: 6354_Reove Bill of Lading	ails efileds <b>v</b> Ex Message Type	Reference Document	Reference liem	Delivery	Item	Material	Post Goods issue Status	Message Text	2
Bill of Lading Det View: <u>6354_Reovi</u> Bill of Lading	ails efileds 💌 Ex Message Type	port 2 Reference Document	Reference Item	Delivery	Item	Material	Post Goods Issue Status	) Nessage Text	2
Bill of Lading Det View: 6354_Reovi Bill of Lading	ails efileds 💌 Ex Message Type	Port  A Reference Document	Reference item	Delivery	Item	Material	Post Goods Issue Status	) Nessage Text	2
Bill of Lading Det View: <u>8354_Reovi</u> Bill of Lading	ails efileds <b>v</b> Ex Message Type	Reference Document	Reference Item	Delivery	Item	Material	Post Goods Issue Status	Message Text	2
Bill of Lading Det View: <u>8354_Reovi</u> Bill of Lading	ails efileds V Ex Message Type	Reference Document	Reference fiem	Delivery	Item	Material	Post Goods issue Status	Message Text	. 2

- 3. Click Choose File (the Choose File button) to locate the BOL file to upload.
- 4. Locate and select the appropriate file to be uploaded. In this example, **BOL 1000129681.xml** was selected.



## Image: Upload BOLs from National Warehouse Screen

								Tur ou ou
Welcome to Uploa	d Bill of Ladings	from National Warehou	Ise					
Please Upload the BO	Ls from National Wa	arehouse to Proceed.						
File Selection								
Choose File BOL 1	J00129681.xml		( )					
Submit								
and the second								
Bill of Lading Deta	ile							
View: 6354_Reove	fileds 💌 Exp	ent "						• 8
View: 6354_Reove	fileds 💌 Exp Message Type	Reference Document	Reference Item	Delivery	Item	Material	Post Goods Issue Status	► 8 Message Text
View: 6354_Reove	fileds 💌   Exp Message Type	Reference Document	Reference Item	Delivery	Item	Material	Post Goods Issue Status	► & Message Text
View: 6354_Reove	fileds 💌   Exp Message Type	Reference Document	Reference Item	Delivery	Item	Material	Post Goods Issue Status	► & Message Text
View: 6354_Reove	fileds 💌 Exp Message Type	Reference Document	Reference Item	Delivery	Item	Material	Post Goods Issue Status	► & Message Text
View: 6354_Reove	fileds 💌 Exp Message Type	Reference Document	Reference Item	Delivery	Item	Material	Post Goods Issue Status	► & Message Text

5. Click Submit (the Submit button) to submit the upload.

## Image: Upload BOLs from National Warehouse Screen

ile Selec	ction	2019-00-10-00-00-							
Choose I	File No file	chosen		2					
- Subir	are -								
Bill of L	Lading Deta	ilis							
View: 6	5354_Reover	fileds 💌 Ex	eport 🖌						•
View: 6	5354_Reovet of Lading	fileds 💌 Ex Message Type	Reference Document	Reference Item	Delivery	Item	Material	Post Goods Issue Status	Message Text
View: E Bill o Z324	6354_Reove of Lading 14567789	Message Type S	Reference Document 1000264645	Reference Item 400	Delivery 80038512	ltem 10	Material 100385	Post Goods Issue Status X	Message Text Delivery created.
View: E Bill ( Z324	5354_Reover of Lading (4567789	Message Type S	Reference Document 1000264645	Reference Item 400	Delivery 80038512	ltem 10	Material 100385	Post Goods Issue Status X	Message Text Delivery created.
View: E Bill ( Z32	6354_Reove of Lading 24567789	Message Type S	Reference Document 1000264645	Reference Item 400	Delivery 80038512	ltem 10	Material 100385	Post Goods Issue Status X	Message Text Delivery created.
View: E Bill ( Z32	5354_Reove of Lading 14567789	Message Type S	Reference Document 1000264645	Reference Item 400	Delivery 80038512	Item 10	Material 100385	Post Goods Issue Status X	Message Text Delivery created.
View: 6 Bill ( Z32	5354_Reove of Lading (4567789	Message Type S	Reference Document	Reference Item 400	Delivery 80038512	Item 10	Material 100385	Post Goods Issue Status X	Message Text Delivery created.

6. Review the uploaded BOL file in the results table.

Ð

(Note) No changes can be made directly in the table. To change the bill of lading information, National Warehouse will need to send a request to the Warehouse Manager (FNS) to reverse Post Goods Issues, so they can re-upload the BOL file with the correct information.

7. Click Export (the Export button) to export the BOL information to a Microsoft Excel file.



Image: Upload Bill Of Lading from National Warehouse Screen

ations > Warehous	e Management >	File Uploads/Downloads > 1	Jpload BOLs from Na	tional Warehous	se			Full Screen	1
Welcome to Uplo Please Upload the E	oad Bill of Ladin OLs from National	gs from National Wareh Warehouse to Proceed.	Duse						
File Selection									
Choose File No fi	le chosen								
Bill of Lading De	tails								
Bill of Lading De View: 6354_Reo	tails refileds V	Export	Reference liem	Delivery	Item	Material	Post Goods Issue Status	Message Text	• 2
Bill of Lading De View: 6354_Reov Bill of Lading 2324567789	tails refileds v I Message Type S	Export Ja Export to Microsoft Excel 1000264645	Reference Item 400	Delivery 80038512	Item 10	Material 100385	Post Goods Issue Status X	Message Text Delivery created.	• 2
Bill of Lading De View: 6354_Reo. Bill of Lading 2324567789	tails refileds • I Message Type S	Export 4 Export to Microsoft Excel 1000264645	Reference litem 400	Delivery 80038512	ltem 10	Material 100385	Post Goods Issue Status X	Message Text Delivery created.	> 2
Bill of Lading De View: 8354_Reov Bill of Lading 2324567789	tails refileds V I Message Type S	Export 4 Export fo Microsoft Excel 1000264645	Reference Item 400	Delivery 80038512	Item 10	Material 100385	Post Goods Issue Status X	Message Text Delivery created.	• 2

8. Click Export to Microsoft Excel (the Export to Microsoft Excel option).

Image: Upload BOLs from National Warehouse Screen

Plea	come to Upl se Upload the I	oad Bill of Lad BOLs from Nation	lings from National al Warehouse to Proces	Warehouse :d.						
File	Selection									
Ch	Submit	file chosen								
-										
Bi	II of Lading De	etails								
Vi	ew: 6354_Reo	vefileds 💌	Export "							
E.	Eill of Lading	Message Type	Reference Document	Reference liem	Delivery	Item	Material	Post Goods Issue Status	Message Text Unload is no longer possible for this Dequisition line item since	itheel
	2024001100	-	1000204045				100000		opene is no ranger possible for this receptionenine new anter	
-		1								
	_			220202105927	xisx from	wbsc	mintdsl.w	vbscm.usda.gov?	Open Save 🔻 Cancel 🗙	>
<	D	o you want to o	pen or save export20	220203103827				<b>j</b>		
<	D	o you want to o	pen or save <b>export20</b>	220203103627						
<	Op	en	pen or save <b>export20</b>	220203103627				,		
<ul> <li></li> <li><td>Op</td><td>en (t</td><td>he <b>Open</b> b</td><td>utton).</td><td></td><td></td><td></td><td>j</td><td></td><td></td></li></ul>	Op	en (t	he <b>Open</b> b	utton).				j		
< ck	Op	en (t	he <b>Open</b> b	utton).				,		
ck	Op	en (t	he <b>Open</b> b	utton).	d pro	mn	tma	v appear diff	erent based on the user's bro	We
ck	Op	en (t (Note) I	the <b>Open</b> b Export file (	utton). download	d pro	mp	t may	y appear diff	erent based on the user's bro	)WS

9.



# Image: Microsoft Excel Screen

	AutoSave 🙆 🌔	<b>B</b> 9 · C ·	≂ export20220203	084527.xisx • Last Me	odified: Just n	ow 🔻	Q		<b>a</b> - a	×
1	File Home	Insert Page	Layout Formulas	Data Review	View	Help			🖻 Share 🛛 🖓 Comm	ents
ł	Califo	ri I <u>U</u> ~   ⊞ ~		E = 22 E = 22 × 5 E ≥ 22 × 50	neral ∽ ∽ % 9   _}?!	E C E F I ■ C	onditional Fo ormat as Tabl ell Styles ~	rmatting ~ 🔛 Insert ~ c ~ 🔀 Delete ~ H Format ~	$ \begin{array}{c c} \Sigma & \bullet & \mathbf{\hat{z}} \nabla & \bullet \\ \hline \Psi & \bullet & \mathcal{P} & \bullet \\ \hline \Phi & \bullet & \bullet \\ \end{array}  $ Sensitivi	ty
0	Tipboard Ta	Font	r⊊i Alig	griment 🗔 )	lumber 5	al.	Styles	Cells	Editing Sensitivi	by A
A	i - i	×	Bill of Lading	D	F	F	6	1 <b>1</b>	1 Y I	*
1	Rill of Lading	Message Type	Reference Document	Reference Item	Delivery	Item	Material	Post Goods Issue Status	Message Text	
2	7324567789	S	1000264645	400	80038512	10	100385	X	Delivery created.	
3		-	1000000000	10.0				n	Denvery Dented	
4	1									
5										
6										
7										
8										
9										
10	1									
11										
12	6									
13										
14	1									
15	ř.									
16	i									
17	•									
18	r -									
19	E.									
20	1									
21	1	0					1			
	Dat	a (+)					1			) F
Re	adv 📾							III III III III III III III III IIII IIII		100%

- **10.** Review or save the Excel file as appropriate.
- 11. Click (the Close button) to return to the Upload BOLs from National Warehouse screen. Image: Upload BOLs from National Warehouse Screen

Ile Selection Choose File No fil	e chosen							
Submit								
Bill of Ladion Det	aile							
View: 6354 Reov	efieds 💌 E	xport _						•
Bill of Lading	Message Type	Reference Document	Reference Item	Delivery	Item	Material	Post Goods Issue Status	Message Text
Bill of Lading Z324567789	Message Type S	Reference Document 1000264645	Reference Item 400	Delivery 80038512	Item 10	Material 100385	Post Goods Issue Status X	Message Text Delivery created.
Bill of Lading	Message Type S	Reference Document 1000264645	Reference Item 400	Delivery 80038512	Item 10	Material 100385	Post Goods Issue Status X	Message Text Delivery created.
Bill of Lading	Message Type S	Reference Document 1000264645	Reference Item 400	Delivery 80038512	Item 10	Material 100385	Post Goods Issue Status X	Message Text Delivery created.
Bill of Lading Z324567789	Message Type S	Reference Document 1000264645	Reference Item 400	Delivery 80038512	Item 10	Material 100385	Post Goods Issue Status X	Message Text Delivery created.
Bill of Lading 2324567789	Message Type S	Reference Document 1000264645	Reference Item 400	Delivery 80038512	Item 10	Material 100385	Post Goods Issue Status X	Message Text Delivery created

**12.** The transaction is complete.



# RESULT

The user has successfully uploaded the Bill of Lading (BOL) file into WBSCM and reviewed the uploaded BOL information.



# PROCESS OVERVIEW

### Purpose

Domestic recipient organizations (or USDA on behalf of a recipient) use this procedure to upload a file with shipment receipt information for a purchase order, sales order, or delivery order in lieu of manually entering each line item in WBSCM. The shipment receipt, also known as the goods receipt (GR), is the method by which the recipient confirms that materials/commodities that were requested in WBSCM have been delivered. The shipment receipt contains:

- When the shipment was received
- Who signed for the receipt
- Good, over, short, or damaged (O/S/D) quantities

Timely entry of a shipment receipt is a critical step in WBSCM. Current <u>FNS policy</u> requires <u>entry of</u> <u>shipment receipts within two calendar days of receiving a delivery</u>.

Users can enter a shipment receipt in WBSCM two ways:

- 1. Use the *Upload Shipment Receipt* transaction to upload a shipment receipt from a comma separate value (CSV) or extensible markup language (XML) file.
- 2. Use the Enter Shipment Receipt transaction to create a shipment receipt manually.

This transaction is beneficial to the receiving organization as personnel often enter this data in other systems as well, and it is much easier to transfer the file than to redo the manual entry.

### **Process Trigger**

Perform this procedure when a recipient has received a direct shipment and needs to upload the shipment receipt to WBSCM.

### Prerequisites

- The PO or sales order must exist in WBSCM.
- The upload file in XML or CSV format must exist.

### Portal Path

Follow the Portal path below to complete this transaction:

 Select Operations tab → Order Processing tab → Shipment Receipts folder → Upload Shipment Receipts link → Upload Shipment Receipts screen.

### **Tips and Tricks**

- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
  - Required (R) a mandatory field necessary to complete the transaction
  - o Optional (O) a non-mandatory field not required to complete the transaction
  - Conditional (C) a field that may be required if certain conditions are met, typically linked to completion of a mandatory field
- Refer to the WBSCM Help site, *Frequently Referenced Training Materials* section for basic navigational training and tips on creating favorites, performing searches, etc.
- If the user needs to enter a shipment receipt directly into WBSCM instead of uploading, refer to the <u>Enter Domestic Shipment Receipt</u> work instruction.



# PROCEDURE

 Start the transaction using this Portal path: Operations tab → Order Processing tab → Shipment Receipts folder → Upload Shipment Receipts link to open the Upload Shipment Receipts screen.

Image: Upload Shipment Receipts Screen

Home Operations Admin R	People Reveal Advancements	
Order Processing Company Administrati	Operations > Order Processing > Shipment Receipts > Upload Shipment Receipt	Full Screen   Options *
File Ubioads/Downloads Catalog Maintenanse Onder Management Endlement Management	Welcome to Upload Shipment Receipt All required fields are marked with a red asterisk (*), Dates are formated as: MM/DD/YYYY. File to Upload Uploaded Data	
Shipment Receipt Enter Chipment Receipt Upload Shipment Receipt NW Delivery Calendar	Plose celect your XML/CSV file for upload  Domesto GR File Header Row exists (applicable to CSV file only ) List Upload by User: 08:31/2021 Kate AlReles List Upload for Organizator: 08:31/2021 TX Deot. of Agnoulture – EDI Upload File	

- 2. Click discrete the Portal menu. Note that this can be done with any transaction in WBSCM.
- 3. Navigate to the upload file and open.



(Note) If the user requires a template to populate for the upload, refer to:

- Upload Goods Receipt XML Template is located at WBSCM → Help → Job Aids folder → Fulfillments (JA) → Upload Goods Receipt SCM Template.
  - This template is provided as a guide for the required fields that must be output from the users' system if an XML file will be uploaded into WBSCM.
  - The user should upload a new file with only new receipt data each time. (Do not resubmit the same receipts).
- Upload Goods Receipt CSV Template is located at WBSCM → Help → Job Aids folder → Fulfillments (JA) → Upload Goods Receipt CSV Template.
  - The user should upload a new file with only new receipt data each time. (Do not resubmit the same receipts).
  - The GR upload file has several columns that will not contain any information. All column headers that appear in the template are required for the upload: do not delete or change columns. No blank rows should be inserted between data sets.
  - Note for AMS users only: Specialists cannot upload a GR file for invoices that they will be approving. E-mail the completed GR upload file to another specialist for uploading. Make sure the file stays in CSV format.



# Image: Microsoft Excel (PO\_XXXXXXXXX\_XX.csv) Screen

10	AutoSave 💽 🔐	19.6	÷.			PO_4100	00XXXXXX0	l.csv - B	cel				<u>م</u> -	- 0	×
FI	le <mark>Home</mark> In	sert Pa	ge Layout	Formula	as Dat	a Reviev	v View	Help	р р те	ll me what y	ou want to	o do	ය Share	🖓 Comm	ents
Pa	Ste Calibri B I poboard G	- ⊻ -   <u>-</u> Font	- A	× A* Ξ A • Ξ	≡ <u>≡</u> % ≣ ≡ Ξ	*• ₿ == ፼••	General \$ + 6 50 →0 3 Numb	er 5	E Condition Format as Cell Styles S	aal Formattin : Table ~ : * tyles	9* 38 12	Insert + Delete + Format+ Cells	∑ * A ↓ Z Sort Filte Edit	Find & R Find & r * Select *	~
Al	t <b>▼</b> t [	XV	f <sub>x</sub> D	ocument ni	umber										~
À	A	В	с	D	E	F	G	H.	1	J	K	L	M	N	-
1	Document number	ITEM #	Railcar/B	C Signed By	Entered	B Comment	pod_qty	pod_qt	y u Date reo	ei Reject Qt	Damage	C Damage	b Damage	D Damage .	AAg
4	4100007025	, <u>,</u>		TEST				-	2019082	5	-			-	
4															
5															
6															
7															
8															
9			-					-							
10				_											
11				-		-			-			-			-
13															
14															
15															
16															
17															
18															
19		_						-		_	-			-	
20															
21															-
22															-
24								-							
25	Ĩ		-												-
	PO_4	10000XXXX	(X_01	÷					4						Þ
											Ħ	E P	-	1	- 100%

- **4.** Populate the data and save the upload file, as described in the <u>file definition reference</u>. Data entry is required for the following fields:
  - Document number
  - ITEM #
  - Signed By
  - Date received
  - Good Quantity (in PO UoM) items purchased by weight only
  - Good Quantity (in CS) items purchased by case and variable weight items



(Note) Before uploading a CSV or XML file, open the file to be sure all fields above are included and displayed in the proper order.

(Note) For variable weight items, the **Good Quantity (in LB)** will be calculated automatically in WBSCM based on the number of cases for eINV receipts. Any value entered in **Good Quantity (in PO UoM)** for variable weight items will be ignored during the upload.

For non-eINV receipts, both the Good Quantity (in LB) and the Good Quantity must be entered.



### Image: Upload Shipment Receipt Screen

persons > Order Modessing > Simplement Receipts > Upload Sinphent Receipt	Full Screen   Option
All required fields are marked with a red asteriek (*). Dates are formatted as: MM/DD/YYYY.	
File to Upload Uploaded Data	
* Domestic GR File: Choose File: No file chosen  V Header Row exists ( applicable to CSV file only )	
Last Upload by User: 08/21/2021 Kate AllRoles Last Upload for Organization: 08/31/2021 TX Dept of Agriculture – EDI	
Diposed File	

- 5. Click Choose File (the Choose File button) to locate the CSV or XML file to upload.
- **6.** Locate and select the appropriate file to be uploaded. In this example, PO\_41000XXXXX\_01.csv upload file was selected.

(Note) Users have no restrictions on naming an upload file; however, a best practice recommendation is to name the file using the ten digit PO number, underscore, followed by the line item number.

Image: Upload Shipment Receipt Screen

erations > Order Processing > Shipment Receipts > Upload Shipment Receipt	Full Screen   Option
Welcome to Upload Shipment Receipt All required fields are marked with a red asterisk (*). Dates are formatted as: MM/DD/YYYY. File to Upload Uploaded Data	
Please select your XML/CSV file for upload	
* Domestic GR File: Choose File PD_410000XXXXX_01.csv	
Header Row exists ( applicable to CSV file only )	
Last Upload by User: 06/21/2021 Katie AllRoles	
Last Uplead for Organization: 08/31/2021 TX Dept. of Agriculture - EDI	
er Upcad File	
	1

7. Click Upload File (the Upload File button) to upload the shipment receipt to WBSCM.

(Note) If the upload file contains a header row, and the upload file is in CSV format, check the **Header Row exists (applicable to CSV file only)** check box.



### Image: Upload Shipment Receipt Screen

rocessing													
erations > Or	der Proces	sing > Ship	ment Receipts	<ul> <li>Upload Shipment R</li> </ul>	eceipt						Ful	Bareen (	Options
elcome to required tields :	Upload are marked	Shipme with a red a	ent Receipt sterisk (*)										
File to Uple	iad L	Jploaded Da	sta										
Uploaded Da	ta												
Please select a	file to upto	ad to view d	ata. Data will be	displayed below									
View: CSV_	JPLD_LAY	OUT 💌	Export 4										
Char 🔺	item +	Batch A	Good Quantity	Good Quantity (CS)	Rejected Quant	ity Damage Quar	tity PoD G	ood Qty. PoD U	oM Railcar/B	OL Signed	By Entere	By Oth	er Comn
4100007029	1			1,080 000						TEST			
Processed	Data												
Submit Rec	sipt												
View: PO_	BASED_RA		Export _										
-	Item# #	Material	Material Desc	r.	Progra	m Delivery Point	Signed by	Date Recieved	Prev. Qty.	Open Qty.	Good City.	JoM Entry	Good
Order # 🔺													

8. Review the Uploaded Data tab to verify the uploaded data.

(Note) (Optional) Click Export (the Export button) in the *Uploaded Data* section to download an Excel file for reference and review prior to submitting the receipt to USDA.

9. Click Submit Receipt (the Submit Receipt button) to submit the shipment receipt to USDA.

# Image: Enter Shipment Receipt (Goods receipt Messages) Screen

	ng												
perations	> Ore	er Proce	ssing > Sh	ipment Receipts	<ul> <li>Upload Shipment R</li> </ul>	leceipt						Full Scree	en   Option
Goods	eceipt v	vas succ	essfully proc	essed Additional	messages might be a	vailable below							
elcom required	e to l lields al	Jploa e marke	d Shipm	ent Receipt asterisk (*)									
File	o Uploa	Id	Uploaded D	)ata									
Upload	ed Data	6											
Please s	elect a t	file to up!	load to view (	data. Data will be	displayed below								
View:	csv_u	PLD_LA	YOUT VI	Export ,									
Char	- 4	ltem 🔬	Batch 🛓	Good Quantity	Good Quantity (CS)	Rejected Quantity	Damage Quantity	PoD Good City.	PoD UoM	Railcar/BOL	Signed By	Entered By	Other Ce
410000	7029	1			1,080.000						TEST		
View:	MESSA	GES	-	Export 4			8,	·)					
Order 1	lumber	Item	MsgType	Message text									
410000	7029	1	s	5000215562 - M	faterial Document(s) w	ere successfully pos	sted for Goods receip	ot i					

**10.** The transaction is complete.





(Note) If an error occurred during an upload, an **E** is displayed in the **MsgType** column. Additional information regarding the error is provided in the **Message text** column. Review the information provided and make corrections if needed. For assistance, contact the WBSCM Helpdesk.



# RESULT

A shipment receipt for a purchase order, sales order, or delivery order was uploaded to WBSCM.



# PROCESS OVERVIEW

### Purpose

The purpose of this transaction is to upload and store National Warehouse batch detail information in WBSCM, including a material's **Manufactured Date**, **Best If Used-by Date**, and quantities on hand. This information allows FNS to generate real-time inventory reports, by coupling it with existing National Warehouse inventory data in WBSCM. This transaction is performed by National Warehouse Org Admins and FNS Inventory Specialists.

## Process Trigger

Perform this transaction to upload batch details from the National Warehouse to WBSCM.

## Prerequisites

• Lot/Batch exists in WBSCM for the materials for which the upload transaction is being run.

## Portal Path

Follow the Portal path below to complete this transaction:

• Select Operations tab → Warehouse Management tab → File Uploads/Downloads folder → Upload National Warehouse Batch Details 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 navigation training and tips on creating favorites, performing searches, etc.



# PROCEDURE

 Start the transaction using the Portal path: Operations tab → Warehouse Management tab → File Uploads/Downloads folder → Upload National Warehouse Batch Details link.

Image: Upload National Warehouse Batch Details Screen

Order Processing	Propurement	Warehouse M	lanagement	Supplier Mgt								
		. 0	perations > V	/arahousa Managi	ement > Fik	e Uploads/Do	wnloads > Upload	National Warehous	se Batch Detail	s		Full Sereen   Options
Batch Manager Delivery Manag	ent ement					Welcome	To Upload Na	ational Wareh	ouse Bato	h Details		
Inventory Mana Warehouse Rep File Uploads/Do National Wa	gement Ienishment whiloads rehouse Orders to	te Filed	To updat result fro informati The Dow	e batch (lot) in m the validatio on from the sp nload to Excel	formation on, and reu oreadsheet i allows say	in WBSCM pload the ving inform	, use the Upload file if necessary. ation in the table	d from Excel bu Select the Upd e to a spreadsh	tton below late Batcher eet.	to select your s button to upo	file. Resolve date WBSCN	any errors that I with the lot
Uplead BOL	s from National Wa	rehouse teh Details	( <u>↑</u> Uploa	ad from Excel	) 🛞 Upd	late Batche	25				U Downle	oad to Excel
Upload Nate	mal Warehouse in	rentory	Material	Material Des	cription	Plant L	torage ocation	Manufactur ed Date	Best If Used-by Date	Pallet Case s on s on Hand Hand	Status/Mes	sage
							No Batch E	ata to Update.				

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

## Image: Upload National Warehouse Batch Details Screen

H	me	Operati	ons Fin	ance	Admin	Reports	He	5										
Orc	der Proc	gnices	Procurenten	t Vi	arehouse N	lanagement	Supp	lier Mgt	E								5.00	1.0.1
Op	erations	s > Ware	nouse Manag	ement	> File Upio	ads/Downloa	ds > Up	load Na	stional V	Warehouse Batoh	Details						Full Scree	en   Options *
							V	/elcor	me To	D Upload Na	tional Warehous	se <mark>Batch Details</mark>	E					
	To the The The Mate	update b file if ne Downlo Upload f erial	atch (lot) ir cessary. Se ad to Excel rom Excel Material	iforma lect th Lallow Descri	ition in WI ne Update vs saving i Update E iption	BSCM, use Batches b nformation Batches	the Up utton to in the t Plant	load fr upda able ti Stora Locat	rom Ei ite WE io a sp ige tion	xcel button be SSCM with the preadsheet. Batch	low to select you lot information fro Manufactured Date	r file. Resolve any om the spreadshe Best If Used-by Date	errors t et. Pallets on Hand	Cases on Hand	It from th Status/	e validati <u>U</u> Dov Message	on, and reup	cel
													пани	Hanu				- 1
										No Batch Da	ta to Update.							

3. If necessary, click Download to Excel (the Download to Excel button) to download a blank copy of the National Warehouse Batch Details Upload File to complete for upload.



4. Open the National Warehouse Batch Details Upload File from where it is stored locally.

# Image: National Warehouse Batch Details Upload File

F	ile	Hom	e ins	ert	Page Layout	F	ormulas		Data Review	1	/iew Help Acrobat				Con	nme	ents 🛛 🖻 Sha	are
P	aste	2 G	Arial B I	U A Fon	× 11 × Ξ × A^ A t 5	⊒ ⊒ Alig	i i i i i i i i i i i i i i i i i i i	, 12	Number v G	dit nat St)	ional Formatting ~ III t as Table * Cells /les ~ * Styles	]	Editing Sensitivi	ity ity	Add-ins C	Creat Ac	e and Share Jobe PDF be Acrobat	~
0	3			×	✓ f <sub>x</sub>													^
	1	A	В		С	. 1	D		E		F	L.	G	1	н			_E
1	Materi	ial 💌	Plant	*	Storage Location	Ψ.	Batch	*	Manufactured Date	*	Best If Used-by Date	Pa	llates on Hand	+	Cases on Hand	+	Status/Messag	ge
2 3 4 5 6 7 8 9 10 11 12 13 14 15																		
16																		
17 18																		
19 20																		
21 22 23																		
24 25																		
.00	4 1		SAP D	ocu	ment Export	6	Ð									_		•

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

Field	R/O/C	Description
Material	R	Unique six-digit number representing a specific material/commodity in WBSCM.
		Example: 100001
Plant	R	Internal plant number that identifies the external warehouse or processor.
		Example: 2300
Storage Location	R	The physical location within a plant where the material is stored. For National Warehouses, this is the commodity program such as CSFP.
		Example: 2000



Field	R/O/C	Description
Batch	R	Also known as Lot, it is a number that uniquely assigns a material manufactured in a lot. The batch material is managed separately from other sets of the same material. Also, used to describe the running of multiple non-manual transactions in WBSCM. <b>Example:</b> 0100755
Manufactured Date	R	The date on which the product was produced by the vendor. Example: 11/18/2012 (Note) Use date format MM/DD/YYYY
Best If Used-by Date	R	The date before which the product shall be used. <b>Example:</b> 11/18/2013 (Note) Use date format MM/DD/YYYY
Pallets on Hand	R	Pallet count in the warehouse. Example: 5
Cases on Hand	R	Case count in the warehouse. Example: 242

Ð

(Note) Complete the National Warehouse Batch Details Upload File with all necessary information.

DO NOT modify, delete, or rearrange the spreadsheet columns.



Hom	e ins	ert Page Layout	Formulas	Data Review \	/iew Help Acrobat		Comme	ents 🛛 🖻 Share	
e 🗳	Arial B I E ~	→ 11 → U → A^ A → Font Fig	= 三 <u>-</u> 22 = 三 三 三 22 ~ □ 王   参 ~ Alignment	Number v Fa	ional Formatting *	Editing Sensitivity Sensitivity	Add-ins Crea Add-ins Add	te and Share dobe PDF	~
		× ✓ f.							^
A	в	с	Formula	Bar	F	G	н	[	-
laterial 💌	Plant	* Storage Locatio	n 💌 Batch 🔹	Manufactured Date	Best If Used-by Date	Pallates on Hand	Cases on Hand *	Status/Message	
100001	2300	2000	0100755	11/18/2012	11/18/2013	5	242		
100001	2300	2000	0100783	11/21/2012	11/21/2013	1	20		
100001	2300	2000	0101266	1/3/2013	1/3/2014	- 20	1077		
100001	2300	2000	0105026	5/9/2013	5/9/2014	20	1096		
100001	2300	2000	0105065	5/11/2013	5/11/2014	21	1140		
100001	2300	2000	1100993	3/3/2013	3/3/2014	. 11	599		
100035	2300	1000	0100162	10/8/2012	10/8/2013	1	50		
100035	2300	1000	0100190	10/8/2012	10/8/2013	1	2		
100035	2300	1000	0100463	11/3/2012	11/3/2013	1	20		
100035	2300	1000	0100860	11/29/2012	11/29/2013	1	3		
									L
		-							-
	CADE		0						
	A aterial • 100001 100001 100001 100001 100005 100035 100035	Home         Instant           Arial         B         I           e         Image: Second Se	Home         Insert         Page Layout           Arial         11         1           B         I         -         A'A'A'           B         I         -         A'A'A'           B         I         -         A'A'A'           B         Font         Is           Catchial         Plant         *           A         B         C           Interval         2000           100001         2000           100001         2000           100001         2000           100001         2000           100001         2000           100003         2000           100003         2000           100003         2000           100003         2000           100003         2000           100003         2000           100003         1000           100003         1000           100035         1000           100036         1000	Home         Insert         Page Layout         Formulas           Arial         11         =         =         #           B         I         U         A'A         =         =         #           B         I         U         A'A         =         =         =         #           B         I         U         A'A         =         =         =         #         #         =         =         #         #         =         =         #	Home       insert       Page Layout       Formulas       Data       Review       Number         Arial       11       =       =       20       90       III Condit         B       I       I       A'A'A'       =       =       20       90       III Condit         B       I       III       A'A'A'       =       =       =       20       90       III Condit         Image: Image Location       Form       Image Location       Im	Home       Insert       Page Layout       Formulas       Data       Review       View       Help       Acrobat         Arial       11	Home       Insert       Page Layout       Formulas       Data       Review       View       Help       Acrobat         Ariad       III       III       IIII       IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	Home       Insert       Page Layout       Formulas       Data       Review       View       Help       Acrobat	Home       insert       Page Layout       Formulas       Data       Review       View       Help       Arrobat       Importants       Importants

# Image: National Warehouse Batch Details Upload File

6. Save the National Warehouse Batch Details Upload File locally and note the location where the spreadsheet is saved.



(Note) The upload file must be in Excel format (.xlsx). Other formats will result in an error during the upload and validation process.

#### Image: Upload National Warehouse Batch Details Screen

н	one	Operat	tions	Finance	Admin	Reports	Heip									
On	der Prop	gnizza	Propurem	ent N	Warehouse N	lanagement	Supp	lier Mgt								
, OF	erations	: ⇒ Wan	ehouse Man	agement	> File Uplo	ads/Download	s > Up	load Nation:	al Warehouse Bat	oh Details					Full Screen	Options =
							W	elcome	To Upload N	lational Warehous	e Batch Details					
	To u the f	ipdate i file if ne Downli Upload	batch (lot) acessary. Dad to Exe from Exo Materi	) Inform Select t cel allo el el	ation in WE the Update ws saving i Update E ription	Batches bu Batches bu Batches	the Upl itton to in the t lant	oad from update V able to a Storage	Excel button VBSCM with t spreadsheet. Batch	below to select your he lot information fro Manufactured Date	file. Resolve any er om the spreadsheet. Best If Used-by Pa Date	llets Cases	ult from the s	validation,	and reuplo	ed
								Location		Dete	Ha Ha	nd Hand				- 1
									No Batch	Data to Update.						-1
																- 1
																- 1



- Upload from Excel T (the Upload from Excel button) to upload the National 7. Click
  - Warehouse Batch Details Upload File to WBSCM.

# Image: Select File Pop-Up Screen

Home	Operatio	ns Financ	u Admin	Heports	нер		_	
Operatio	ons > Wareh	ouse Managem	ant > File Uplo	ads/Downloads	> Upload Nat	onal Warehouse Batch Details		Full Screen   Options *
					Welcon	e To Upload National Warehouse Ba	tch Details	
TR	o update ba	tch (lot) info	mation in Wi	BSCM, use th	e Upload fr	m Excel button below to select your file. I	Resolve any errors that resu	it from the validation, and reupload
T	ne Downloa	essary: Gener ad to Excel al	lows saving i	nformation in	the table to	a spreadsheet.	e spreadancer	
	Upload fr	om Excel	🙊 Update E					Download to Excel
Ma	iterial	Material De	scription	Pt	ant Sto	Select File	d-by Pallets Cases on on Hand Hand	StatusMessage
						Upload can	cel	

Browse .... 8. (the Browse... button) to select the upload file. Click



(Note) The upload file must be in Excel format (.xlsx) to be uploaded. Other formats will result in an error during the upload process.

9. Locate and select the appropriate file to be uploaded. In this example, the National Warehouse Batch Details Upload xlsx file was selected.

## Image: Select File Pop-Up Screen

Home	Operation	s Finano	e Admin	Reports	Help						
Order Pro	ocessing F ns ⇒ Wareho	Produrement Iuse Manageme	Warehouse M ant > File Uplo	lanagement ads/Download	Supplier N is > Upload	ifgt National Warehouse Estoh Detsils					Full Screen   Options •
					Welc	ome To Upload National	Narehouse Bate	ch Details			
To	update bat e fite if nece	ch (lot) infor	mation in Wi t the Update	BSCM, use Batches b	the Upload	I from Excel button below to date WBSCM with the lot info	select your file. R	esolve any errors th spreadsheet.	nat resul	It from the validation	, and reupload
Th	e Downloar	d to Excel al	lows saving i	nformation	in the table	e to a spreadsheet.					
1	Upload fro	om Excel	🌒 Update B							Down	load to Excel
Mat	terial	Material De	scription	1	Plant Sto	Select	ile	by Pallets on Hand	Cases on Hand	Status/Message	
						National Warehouse B	Browse				
						-	Upload can	cel			



# 10. Click Upload (the Upload button).

# Image: Success Pop-Up Screen

Home	Operations	Finance	Admin	Reports	Help							
Order Pro	cessing Pro	surement W	/arehouse Ma	nagement	Supplie	er Mgt						
Operation	ns > Warehous	e Management	> File Uploa	is/Download	is > Uplo	ad Nat	tional Warehouse Batch	Details				Full Screen   Options -
					We	lcon	ne To Upload Na	tional Warehou	use Batch D	atails		
To	update batch	(lot) informa	ition in WB	SCM, use	the Uplo	ad fr	om Excel button be	low to select yo	ur file. Resolu	any errors	that res	uit from the validation, and reupload
Th	a Download t	any, select of	ic opacto i	formation	in the tal	ble tr	se vroasen nitti are		nom me oprec	ula: Idel:		
10		D EXCEL SILOW	is seving in	ormation	in the La	DIE 11	o a spreadsheet.					
	Upload from	Excel	Update Ba	itches								Download to Excel
Mat	terial M.	aterial Descri	iption	P	lant S	to	Z	Success		-by Pallets on Hand	Cases on Hand	Status/Message
10	0001 BL 36	ITTER PRINT /1 LB	r salted o	TN- z	300 20	00	Batch details valida	ted successfully		5	242	Material can be updated.
10	0001 BL 36	/TTER PRINT /1 LB	r salted c	TN- 2	300 20	00.	010000	APALIAN	OK	i.	20	Material can be updated.
10	0001 BL 36	ITTER PRINT /1 LB	SALTED C	TN- 2	300 20	000	0101266	1/3/13	1/3/14	20	1077	Material can be updated.
10	0001 BL 36	ITTER PRINT	r salted c	<sup>TN-</sup> 2	300 20	000	0105026	5/9/13	5/9/14	20	1096	Material can be updated.
10	0001 BL 36	ITTER PRINT /1 LB	r salted o	TN- 2	300 20	000	0105065	5/11/13	5/11/14	21	1140	Material can be updated.

# 11. Click (the OK button).



(Note) The upload file goes through a validation process. After the process is completed, any records containing errors are listed at the top of the display table for easy identification. These errors must be corrected or the records removed from the file before it is re-uploaded to WBSCM; otherwise, the update with error records will be prevented.

# Image: Upload National Warehouse Batch Details Screen

one	Operations	Finance	Admin	Reports	He/p								
der Proc	sessing Procu	rement V	arehouse Ma	anagement	Supplier	Mgt							
perations	s > Warehouse	Management	> File Uploa	ds/Downloads	> Uploa	d Nationa	il Warehouse Bate	h Datails					Full Screen Options
					Wel	come '	To Upload N	ational Warehou	ise Batch Deta	ils			
To the The The Mate	update batch ( file if necessa Download to Upload from E erial Mat	lot) Informa ry. Select ti Excel allow excel	tion in WB ne Update I is saving in Update B ption	SCM, use t Batches bu formation i atches Pla	he Uploa tion to up n the tab	od from odate V le to a : prage cation	Excel button to VBSCM with the spreadsheet. Batch	elow to select you le lot information f Manufactured Date	ur file. Resolve ar rom the spreadsi Best If Used-by Date	Pallets	Cases on	ult from the validation,	and reupload
					20	cation		Date	Date	Hand	Hand		
100	0001 BUT 36/1	TER PRINT	SALTED C	23 CTN-	00 20	00	0100755	11/18/12	11/18/13	5	242	Material can be upda	ted.
100	0001 BUT 36/1	TER PRINT	SALTED C	23 CTN-	00 20	00	0100783	11/21/12	11/21/13	1	20	Material can be updat	ted.
100	0001 BUT 36/1	TER PRINT	SALTED C	CTN- 23	00 20	00	0101266	1/3/13	1/3/14	20	1077	Material can be updat	ted.
100	0001 BUT 36/3	TER PRINT	SALTED C	ZTN- 23	00 20	00	0105026	5/9/13	5/9/14	20	1096	Material can be updat	ted.
	BUT		5-6 (A. 17-6 (C) (A. 17)										



12. Click Update Batches (the Update Batches button) to update the batch information in WBSCM.

# Image: Success Pop-Up Screen

me	Operations	Financi	a Admin	Reports	Help							
ler Proc	cessing Pro	curement	Warehouse M	anagement	Supplier	Mgt						
eration	s > Warehous	e Manageme	nt > File Uplo	ads/Downloads	> Uploa	d National Warehouse Ba	toh Datails					Full Screen Options
					Wel	come To Upload I	Vational Ware	house Batch D	etails			
To	update batcl	i (lot) Infor	mation in WE	ISCM, use t Ratches bu	he Uploa	ad from Excel button	below to select	your file. Resolu	e any errors adshapt	that res	ult from the validati	on, and reupload
The	e Download	o Excel all	ows saving in	nformation i	n the tab	le to a spreadsheet.						
1.1	Upload from	Excel	😰 Update E								L Down	load to Excel
_						r			Pallets	Cases		
Mat	erial M	aterial Des	cription	Pl	ant Lo	d	Success		Hand	on Hand	Status/Message	
100	0001 B	JTTER PR	NT SALTED	CTN- 23	00 20	Batch informatio	n updated succi	essfully.	5	242	Success: Material	Updated.
100	0001 B	JTTER PR V1 LB	NT SALTED	CTN- 23	00 20	or	ANGENIAG	OK	4.	20	Success: Material	Updated.
100	0001 B	JTTER PR	NT SALTED	CTN- 23	00 20	00 0101266	1/3/13	1/3/14	20	1077	Success: Material	Updated.
100	0001 B	JTTER PR	NT SALTED	CTN- 23	00 20	00 0105026	5/9/13	5/9/14	20	1096	Success: Material	Updated.
	B	TTER PR	NT SALTED	CTAL								

13. Click (the Ok button).

(Note) The *Status/Message* column is updated with the current status of the uploaded records. In this example, **Success: Material Updated.** is the status showing for each row.



(Note) Any records with errors will be listed at the top of the display table.

Image: Upload National Warehouse Batch Details Screen

				_	_	_		_		_
r Processing	Procurement Warehouse Manager	ent Su	oplier Mgt							1
rations ⇒ Wa	arehouse Management > File Uploads/Dow	nicads > (	Jpload Nationa	i Warehouse Bato	h Datails					Full Screen Option
			Welcome	To Upload Na	ational Warehou	se Batch Deta	ils			
To update the file if r The Down	batch (lot) Information in WBSCM, necessary. Select the Update Batch Iload to Excel allows saving informa d from Excel	use the U es button tion in the	pload from to update V table to a :	Excel button b /BSCM with th spreadsheet.	elow to select you e lot information f	ir file. Resolve ar rom the spreads	ny errors neet.	that res	uit from the validation,	and reupload
Material	Material Description	Plant	Storage Location	Batch	Manufactured Date	Best If Used-by Date	on Hand	on Hand	Status/Message	
100001	BUTTER PRINT SALTED CTN- 36/1 LB	2300	2000	0100755	11/18/12	11/18/13	5	242	Success: Material Up	dated.
100001	BUTTER PRINT SALTED CTN- 36/1 LB	2300	2000	0100783	11/21/12	11/21/13	1	20	Success: Material Up	dated.
100001 100001	BUTTER PRINT SALTED CTN- 36/1 LB BUTTER PRINT SALTED CTN- 36/1 LB	2300 2300	2000 2000	0100783	11/21/12 1/3/13	11/21/13 1/3/14	1 20	20 1077	Success: Material Up Success: Material Up	dated. dated.
100001 100001 100001	BUTTER PRINT SALTED CTN- 36/1 LB BUTTER PRINT SALTED CTN- 36/1 LB BUTTER PRINT SALTED CTN- 36/1 LB	2300 2300 2300	2000 2000 2000	0100783 0101266 0105026	11/21/12 1/3/13 5/9/13	11/21/13 1/3/14 5/9/14	1 20 20	20 1077 1096	Success: Material Up Success: Material Up Success: Material Up	dated. dated. dated.



14. Click Download to Excel (the Download to Excel button) to download the status results of the uploaded batch information.



(Note) An Excel file containing the uploaded batch details with the updated **Status/Message** information for each record is downloaded to the user's local download storage location.

## Image: Information Pop-Up Screen

Home Opera	tions Finance Admin Rep	orts H	leip							
order Processing	Procurement Warehouse Managem	ent Su	ipplier Mg	ıt.						
Operations > Wa	rehouse Management > File Uploads/Dow	nicads >	Upload N	lational Warehouse Bato	h Details					Full Screen   Options *
			Welco	me To Upload N	ational Warel	nouse Batch D	etails			
To update	batch (lot) information in WBSCM.	use the L	ipload t	from Excel builton b	elow to select	your file, Resolv	e any errors	that res	ult from the validation,	and reupload
The Down	ecessary, select the optiate batche	tion in the	to upos	to a spreadsheet	e tocintormati	an from the spre				
The Domi			e (able)	to a spreadsmeet.					1	11 m 12
	I from Excel								Downloa	d to Excel
Material	Material Description	Plant	Sto	i	Information		by Pallets on Hand	Cases on Hand	Status/Message	
100001	BUTTER PRINT SALTED CTN- 36/1 LB	2300	200	Batch data downlo	paded		5	242	Success: Material Upo	lated.
100001	BUTTER PRINT SALTED CTN- 36/1 LB	2300	200	0100703		OK	4	20	Success: Material Up	lated.
100001	BUTTER PRINT SALTED CTN- 36/1 LB	2300	2000	0101266	1/3/13	1/3/14	20	1077	Success: Material Up	lated.
100001	BUTTER PRINT SALTED CTN- 36/1 LB	2300	2000	0105026	5/9/13	5/9/14	20	1006	Success: Material Up	iated.
100001	BUTTER PRINT SALTED CTN- 36/1 LB	2300	2000	0105065	6/11/13	5/11/14	21	1140	Success: Material Up	dated.

# **15.** Click OK (the OK button).

## Image: Upload National Warehouse Batch Details Screen

								_	_	
er Processin	g Procurement	Warehouse Ma	anagement	Supplier Mgt						
arations > V	Warehouse Managemei	nt 🗧 File Uploa	ds/Downloads	> Upload Nation:	al Warehouse Bato	h Details				Full Screen Option
				Welcome	To Upload Na	ational Warehou	ise Batch Deta	lls		
To updat the file if The Dow <u>1</u> Uplo Material	te batch (lot) inforr f necessary. Select wnload to Excel allo bad from Excel	mation in WB the Update I ows saving in Update Ba cription	SCM, use the Batches butte formation in atches Plar	e Upload from on to update V the table to a the Storage Location	Excel button b VBSCM with th spreadsheet. Batch	elow to select you e lot information f Manufactured Date	IT file. Resolve ar rom the spreads Best If Used-by Date	Pallets	Cases	ult from the validation, and reupload
								Hand	Hano	
100001	BUTTER PRI 36/1 LB	NT SALTED C	CTN- 2300	2000	0100755	11/18/12	11/18/13	5	242	Success: Material Updated.
100001 100001	BUTTER PRI 36/1 LB BUTTER PRI 36/1 LB	NT SALTED O	CTN- 2300	2000 2000	0100755 0100783	11/18/12 11/21/12	11/18/13 11/21/13	5 1	242 20	Success: Material Updated.
100001 100001 100001	BUTTER PRI 36/1 LB BUTTER PRI 36/1 LB BUTTER PRI 36/1 LB	NT SALTED C NT SALTED C NT SALTED C	CTN- 2300 CTN- 2300 CTN- 2300	2000 2000 2000 2000	0100755 0100783 0101266	11/18/12 11/21/12 1/3/13	11/18/13 11/21/13 1/3/14	5 1 20	242 20 1077	Success: Material Updated. Success: Material Updated. Success: Material Updated.
100001 100001 100001 100001	BUTTER PRI 36/1 LB BUTTER PRI 36/1 LB BUTTER PRI 36/1 LB BUTTER PRI 36/1 LB	NT SALTED C NT SALTED C NT SALTED C NT SALTED C	2300 27N- 2300 27N- 2300 27N- 2300 27N- 2300	2000 2000 2000 2000 2000	0100755 0100783 0101266 0105026	11/18/12 11/21/12 1/3/13 5/9/13	11/18/13 11/21/13 1/3/14 5/9/14	5 1. 20 20	242 20 1077 1096	Success: Material Updated. Success: Material Updated. Success: Material Updated. Success: Material Updated.

**16.** The transaction is complete.



# RESULT

National Warehouse Batch Details data has been uploaded, validated, and stored in WBSCM. The results of the process have been downloaded locally.



# PROCESS OVERVIEW

### Purpose

The purpose of this transaction is to update a Recipient Agency (RA) organization in WBSCM by an SDA Org Admin. There are two options for updating:

- 1. Enter updates with the Maintain RA Organization transaction.
- 2. Upload an XML file containing the information to be updated.

This document reviews steps to upload an XML file.

## Process Trigger

An update to an RA Organization is required.

## Prerequisites

- The RA must exist in WBSCM.
- An XML file must exist on the user's computer.

## Portal Path

Follow the Portal path to complete this transaction:

• Select Admin tab → Organization Maintenance tab → Upload RA Updates link to go to the Upload RA Updates 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.** Open the XML file.



(Note) The XML file must contain all RA maintenance fields and data in the correct format to for a successful upload.

# Image: Notepad Screen

	RA_U	PLOAD_U	PDATES	txt - Notepad			<u>1775</u> 2		×
File	Edit	Format	View	Help					
<re< td=""><td>cipier</td><td>nt-agenc</td><td>ies&gt;</td><td>1000 B 100</td><td></td><td></td><td></td><td></td><td>~</td></re<>	cipier	nt-agenc	ies>	1000 B 100					~
	<	recipie	nt-age	ency>					
				<rabpid>40</rabpid>	09362 <td>[d&gt;</td> <td></td> <td></td> <td></td>	[d>			
				<raname>P1</raname>	acer County<	/raName>			
				<raidentif< td=""><td>ier&gt;RA101<td>aldentifier&gt;</td><td></td><td></td><td></td></td></raidentif<>	ier>RA101 <td>aldentifier&gt;</td> <td></td> <td></td> <td></td>	aldentifier>			
				<racounty></racounty>	Placer <td>ounty&gt;</td> <td></td> <td></td> <td></td>	ounty>			
				<razone>5&lt;</razone>	/razone>	Code			
(mail	Delive	anyl acat	ione	<pre>craripscod</pre>	esaak/rarips	scodes			
1 0	caDeli	vervloc	59931	04//caDelive	cyl och				
2	/raDel	ivervlo	cation	15>	i y Locy				
20				<raprgmid></raprgmid>					
				<raprogram< td=""><td>&gt;CACFP<td>ogram&gt;</td><td></td><td></td><td></td></td></raprogram<>	>CACFP <td>ogram&gt;</td> <td></td> <td></td> <td></td>	ogram>			
	<	/recipi	ent-ag	gency>					
<td>ecipie</td> <td>ent-agen</td> <td>cies&gt;</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>	ecipie	ent-agen	cies>						
6									
			1.122		4000		110000		
			L	n 8, Col 31	100%	Windows (CRLF)	UIF-	8	

2. Update the XML as necessary. In this example, the **<raName>** field is changed to **Placer County Food Bank**.



# Image: Notepad Screen

```
RA_UPLOAD_UPDATES.txt - Notepad
                                                                       X
File Edit Format View Help
<recipient-agencies>
        <recipient-agency>
                        <raBPId>4009362</raBPId>
                        <raName>Placer County Food Bank</raName>
                        <raIdentifier>RA101</raIdentifier>
                        <raCounty>Placer</raCounty>
                        <raZone>5</raZone>
                        <raFipsCode>99</raFipsCode>
<raDeliveryLocations>
 <raDeliveryLoc>5003104</raDeliveryLoc>
 </raDeliveryLocations>
                      <raPrgmId>
                        <raProgram>CACFP</raProgram>
                      </raPrgmId>
        </recipient-agency>
</recipient-agencies>
                     Ln 4, Col 35
                                         100%
                                                Windows (CRLF)
                                                                 UTF-8
```

3. Select File (the File menu option).



# Image: Notepad Screen

File	Edit Format	View Help			
	New New Window Open	Ctrl+N Ctrl+Shift+N Ctrl+O	4009362 Placer County Food Bank <td>ame&gt;</td> <td></td>	ame>	
	Save	Ctrl+S	<pre>/&gt;Placer</pre>		
	Save As	Ctrl+Shift+S	<pre>&gt;</pre>		
	Page Setup		vervLoc>		
	Print	Ctrl+P	1714 TOTS		
			- 1012-1020-00122201-5- M2 (a)		
/re	Exit cipient-agenc	nt-agency> ies>	am>CACFP		
/re	Exit cipient-agenc	nt-agency> ies>	am>CACFP _}		
/re	Exit ecipient-agenc	ent-agency> ies>	am>CACFP		2

4. Select Save (the Save option).



## Image: Notepad Screen

```
RA_UPLOAD_UPDATES.txt - Notepad
                                                                              X
File Edit Format View Help
<recipient-agencies>
        <recipient-agency>
                        <raBPId>4009362</raBPId>
                        <raName>Placer County Food Bank</raName>
                        <raIdentifier>RA101</raIdentifier>
                        <raCounty>Placer</raCounty>
                        <raZone>5</raZone>
                        <raFipsCode>99</raFipsCode>
<raDeliveryLocations>
 <raDeliveryLoc>5003104</raDeliveryLoc>
  </raDeliveryLocations>
                      <raPrgmId>
                        <raProgram>CACFP</raProgram>
                      </raPrgmId>
        </recipient-agency>
</recipient-agencies>
                     Ln 4, Col 35
                                         100%
                                                                 UTF-8
                                                Windows (CRLF)
```

**5.** Click  $\times$  (the **Close** button).



(Note) After closing the XML file, navigate to the Upload RA Updates screen on the portal to upload the XML file.

6. Start the transaction using the Portal path: Admin tab → Organization Maintenance tab → Upload RA Updates link.



# Image: Upload RA Updates Screen

Achini > Organization Maintenance > Upload RA Updates (Put Screen Opto	me Operations Admin	lepons Helo	
Atantain Organization Joined RA Update In RA Update File Selection Choose File No file ohosen @ Uploed File		Admin > Organization Maintenance > Upload RA Updates	Full Screen Options
Jordat RA Updates	Maintain Organization		
Incad RA Update	Upload New RA Organizations	Update RA Information	
Choose File No file obsern	Upload RA Updates	S RA Lipdate File Selection	1
		Choose File No file phasen	

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

Image: Upload RA Updates Screen

Home Operations Admin Reports Help	
Manage Users Master Data Organization Maintenance	
Admin > Organization Maintenance > Upload RA Updates	Full Screen   Options 🖛
Update RA Information	
RA Update File Selection	Ξ
Choose File No file chosen	

8. Click Choose File (the Choose File button) to locate the file to be uploaded. In this example, the RA\_UPLOAD\_UPDATES.txt file was located.



# Upload RA Updates Screen

me Operations Admin Reports Heb	
Inape Users Master Data Organization Maintenance Inn > Organization Maintenance > Upload RA Updates	Full Screen   Opti
Undate PA Information	
RA Update File Selection	
Choose File RA_UPLOAPDATES.te du Upload File	

9. Click Upload File (the Upload File button).

## Upload RA Updates Screen

RA		RAldentifier		
4009362		RAIDI		
RAs Not Updated	I			
RA	RA Identifier	RAAtribute	Error Message	

**10.** Review the *RAs Successfully Updated* section.



(Note) The following display:

- Business Partner Number in the RA column
- RA Identifier of the RA that was modified.
- **11.** The transaction is complete.



# RESULT

The RA organization was updated by uploading an XML file to WBSCM,



# PROCESS OVERVIEW

## Purpose

The purpose of this transaction is to update an SDA sales order by uploading sales order XML files to WBSCM.

## **Process Trigger**

Use this procedure to upload an XML file containing updated information for one or multiple sales orders.

## Prerequisites

 An XML file containing sales order information (such as valid Sold-To, Ship-To, correct delivery date, material ID, Program Code, Quantity, UOM, Entitlement/Bonus, Correlation ID) must be available to the SDA user.

## Portal Path

Follow the Portal path below to complete this transaction:

• Select Operations tab → Order Processing tab → File Uploads/Downloads folder → Upload SDA Sales Order link to go to the Upload SDA Sales Order 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 Portal path: Operations tab → Order Processing tab → File Uploads/Downloads folder → Upload SDA Sales Order link.

Image: Upload SDA Sales Orders Screen

Home Operat	ions Admin	Reports Help	
Order Processing	Complaint Administra	traton Recall Administration	
		Operations > Order Processing > File Uploads/Downloads > Upload SDA Sales Orders	Full Screen Options *
Fie Uploads/Do Download Cl Download S Download S Upload SDA Catalog Mainter Order Manager Entitement Var Shipment Recel NW Delivery Ca	wnloads stalog Inchase Ordens Sales Orders Sales Orders Isan	Welcome to the Upload SDA Sales Orders Application  All required fields are mailed with a red asteriak (*):  File Salest Choose File No file chosen  Submo China S Submit for Background Processing  Recuits  Ver: [Standard Ver/  Ectamal Reference Number: Massage Type Massage Text Sales Order Item Status  Described Results to XML C Described Results to CBV	Status Description

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

Image: Upload SDA Sales Orders Screen

Bitons > Order Processing > Plie Upload SDA Sales Orders       Full Sen         Weccured fields are marked with a red salerisk (*).       File Selection         ** File Name: Crosse File No file chosen	
Velcome to the Upload SDA Sales Orders Application  I report field are mained with a red asterisk (*).  File Selection  Submit Or Disc File No file chosen  Submit for Background Processing Result  View: [Standard View]  External Referance Number: Message Type Message Text: Sales Order Item Status Description	Screen   O
Submit Critica [3] Submit for Background Processing Results View: [Standard View]  E External Referance Number: Message Type Massage Text: Sales Order Item Status Status Description	
View. Standard View] 💌	
IEF External Referance Number: Message Type Message Text: Sales Order Item Status Status Description	•
Downrided Results to XML   🏟 Downrided Results to CSV	

3. Click Choose File (the Choose File button) to locate the SDA Sales Order XML file to be uploaded.



# Image: Upload SDA Sales Orders Screen

	ownloads > Upload SDA Sales Or	iers				Full Scr	een   Op
leicome to the Upload SDA Sa	les Orders Application						
I required fields are marked with a red asterisk	k (*).						
File Selection							
* File Name: Choose File Order upload_10	0008_50.txt	2					
Submit Online 🛛 🖧 Submit for Background	d Processing	35					
Results							
View: [Standard View]							
External Reference Number	Message Type	Message Text	Sales Order	ltem	Status	Status Description	

**4.** Perform one of the following:

lf	Then
The Sales Order XML document contains fewer than 50 records	Go to Step 6.
The Sales Order XML document contains 50 records or more	Go to Step 9.

Ð

(Note) The user located and selected the XML file. In this example, Order upload\_100008\_50.txt was selected.

# Image: Upload SDA Sales Orders Screen

tions > Order Processing > File Uploads/Do	Recall Administration swnloads > Upload SDA Sales Ord	le 3				Full Scre	en   Opt
I required fields are marked with a red asterisk	· · ·						
File Selection							
* File Name: Choose File Order upload_10	0008_50.txt						
Submit Online Submit for Background	1 Processing						
Results							
View: [Standard View]							+ (
🖹 External Reference Number	Message Type	Message Text	Sales Order	ltem	Status	Status Description	
Download Results to XML    (1) Download	Results to CSV						
Download Results to XML	Results to COV						



5. Click Submit Online (the Submit Online button).



(Note) The **Submit Online** option is used to upload or process an XML file with fewer than 50 orders or records. If there are more than 50 orders, and Submit Online (the **Submit Online** button) is used, an error message displays asking to use Submit for Background Processing (the **Submit for Background Processing** (the **Submit for Background Processing** button):

"Your file has more than 50 Records. Please use the 'Submit for background processing' option to process the XML file."

## Image: Upload SDA Sales Orders Screen

required fields are marked with a red asterisk ( File Selection	*}-						
File Name. Choose File No file chosen							
Submit Online	Processing	217					
Results							
View: [Standard View]							
B External Reference Number	Message Type	Message Text	Sales Order	item	Status	Status Description	
CORPUS CHRISTI FOOD BANK	S		5000387690	100	ASDA	Approved by SDA	
HOUSTON FOOD BANK	s		5000387691	100	ASDA	Approved by SDA	
DALLAS FOOD BANK	S		5000387692	100	ASDA	Approved by SDA	
EL PASO FOOD BANK	S		5000387693	100	ASDA	Approved by SDA	

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

Field	R/O/C	Description
External Reference Number	0	The Sold-To Party's external reference information.
		Example:
		Corpus Christi Food Bank
Message Type	0	Specific interpretation scheme for electronically
0		transmitted data.
		Example:
		S
		(Note) Options for this field are S
		(Success), E (Error), W (Warning), I
		(Information), or A (Abort)



Field	R/O/C	Description
Message Text	0	The text of the system message. Note that this field may not populate if there is no message provided.
Sales Order	0	Legal document created with sales information such as name of customer, materials purchased, quantities requested, and price. <b>Example:</b> 5000387690
ltem	0	The line item on the document. Example: 100
Status	0	The code for status of the document. Example: ASDA
Status Description	o	The definition of the status code. <b>Example:</b> Approved by SDA

# Image: Upload SDA Sales Orders Screen

FIL	quired fields are marked with a red asterisk (*). e Selection							
- 10	la Norse Chrone File No file chosen							
-	ite ruerte. Concose ne ino the prosen							
P .	Submit Online   A3 Submit for Beckground Pre-	poessing						
Vie	aw: [Standard View]							
B	External Reference Number	Message Type	Message Text	Sales Order	item	Status	Status Description	
	CORPUS CHRISTI FOOD BANK	s		5000387690	100	ASDA	Approved by SDA	
	HOUSTON FOOD BANK	5		5000387691	100	ASDA	Approved by SDA	
	DALLAS FOOD BANK	S		5000387692	100	ASDA	Approved by SDA	
	EL PASO FOOD BANK	S		5000387693	100	ASDA	Approved by SDA	


7.	Perform one of the following:
	14

lf	Then
To download results in XML format	Click Download Results to XML (the Download Results to XML button).
To download results in CSV format	Click Download Results to CSV (the Download Results to CSV button).

	-		h
			,
× 1		1	
1			
~			

(Note) Note Download Results to XML (the Download Results to XML) and

Townload Results to CSV (the Download Results to CSV button) are only enabled after clicking the Submit Online button.

The download step is optional. Perform the download to validate the upload results.

#### 8. Go to Step 12.

## Image: Upload SDA Sales Orders Screen

		ue's				Full St	creen   Oş
elcome to the Upload SDA	Sales Orders Application						
I required fields are marked with a red aste	nisk (*).						
File Selection							
File Name. Choose File Order upload	100008_50.tx1						
Submit Online   Ag Submit for Backgro	Jund Processing						
Results							
View: [Standard View]							•
B External Reference Number	Message Type	Message Text	Sales Order	Item	Status	Status Description	
Download Results to XML	oad Results to CSV						

9. Click Submit for Background Processing (the Submit for Background Processing button) to process the Sales Order XML file with 50 or more records.



(Note) The system performs validations to ensure the XML file formatting is correct, data is valid (i.e. Sold-To, Ship-To, and Material ID, Program Code, Req Delivery Periods, FTL quantity, UOM, Correlation ID, Ent/Bonus indicator) and that the user has a valid email address on their profile.



## Image: Upload SDA Sales Orders Screen

Processing Compant Administration stons > Order Processing > File Uploads You have successfully submitted Sales ( Once processing is complete you will rev	Recall Administration s/Downloads > Upload SDA Sales Or Order line items for batch processing coave an e-mail with the results at when	ters meauth@gmail.com				Fuli Screen
Velcome to the Upload SDA	Sales Orders Application					
File Selection						
* File Name: Choose File No file chosen	1					
📫 Submit Online 🛛 🔊 Submit for Backgro	und Processing					
Results						
View: [Standard View]						
10 10 10 10 10 10 10 10 10 10 10 10 10 1		44	Sales Order	Item	Status	Status Description
External Referance Number	Message Type	Massage lext				
External Referance Number	Message Type	Message lext				
Etamal Raferance Number	Message Type	Message lext				
External Referance Number	Message Type	Massage fext				
External Referance Number	Message Type	Message lext				
External Referance Number	Massage Type	Message lext				

**10.** Review the confirmation messages.

#### Image: WBSCM Notification

		_	_		SDA Sales Order Upload Results - Message (HTML)	
Inte Message						۵ (
lgnore X (a) (a) Junk - Delete Reply R	Reply Forward to More +	Ala TO DO Ala T Sala Team E-mail √ C Ca Reply & Delete 90 C	To Manager - Done - Create New +	Move B	hules * DeeNote Mark, Categorize Foliow * Ubrevel b * Ubrevel * Ubreve	
Delete	Respond	Quick Steps	15	Ge Mov	e Tags is Eding Zoom	
From: WBSCM Noti To: SDA Order N CC Subject: SDA Sales Order	tification Manager - Upload Results					Sent: Wed 4/9/2014 12:28 PM
- Message Gorder Uplow	d Result.csx (S-KB)	Order Upload Result.txt	t (5 KB)	Order Uploe	id Results HTM (5.08)	
This email is notification	n that your Order upload	file was processed. Ple	ease review the re	esults below.	Output/Result files are attached as "TXT" and "CSV" files.	0
This email is notification Submitted Date/Time : : Submitted User: ORDE Please contact the WBS Due to issues surroundin	n that your Order upload 2022-05-05 at 08:15:00 ERMA S0001 SCM Help Desk with any ing the emailing of "XMI	file was processed. Ple CST questions. 2° file attachments, th	ease review the re	esuits below.	Output Result files are attached as "TXT" and "CSV" files. XT" extension. To use as an "XML", please save the ".TXT" file with an ".XML" extension.	
This email is notification Submitted Date Time : . Submitted User: ORDE Please contact the WBS Due to issues surroundin External Reference Nu	n that your Order upload 2022-05-05 at 08:15:00 ERMA S0001 SCM Help Desk with any ing the emailing of "XMI umber Wise Type Messag	file was processed. Ple CST / questions. 	ease review the re he ".XML" is attr	esults below. ached as a *.1	Output Result files are attached as "TXT" and "CSV" files. XT" extension. To use as an "XML", please save the ".TXT" file with an ".XML" extension Status, Status, Description	n.
This email is notification Submitted Date Time : : Submitted User: ORDE Please contact the WBS Due to issues surroundin External Reference Nut WBSCMA000	n that your Order upload 2022-05-05 at 08:15:00 ERMAS0001 SCM Help Desk with any ing the emailing of "XME imber Msg Type Messag	file was processed. Ple CST / questions. C <sup>*</sup> file attachments, th e Text	ease review the re- he ".XML" is atta ID    5000191178 (	esults below. ached as a *.1 item	Output Result files are attached as "TXT" and "CSV" files. XT" extension. To use as an "XML", please save the ".TXT" file with an ".XML' extension Status Status Description Status Description	
This email is notification Submitted Date Time : Submitted User: ORDE Please contact the WBS Due to issues surroundin External Reference Nu WBSCMA000	n that your Order upload 2022-05-05 at 08:15:00 ERMAS0001 SCM Help Desk with any ing the enailing of "XME imber Msg Type Messag S	file was processed. Ple CST / questions. L" file attachments, th e Text	ease review the re he ".XML" is attr ID I 5000191178 ( 5000191178 (	esults below. ached as a *.1 Item 0000000100 000000100	Output Result files are attached as "TXT" and "CSV" files. XT" extension. To use as an "XML", please save the ".TXT" file with an ".XML" extension Status [Status Description ASDA Approved by SDA ASDA Approved by SDA	
This email is notification Submitted Date Time : Submitted User: ORDE Please contact the WBS Due to issues surroundin External Reference Nur WBSCMA000 WBSCMA001	n that your Order upload 2022-05-05 at 08:15:00 ERMAS0001 SCM Help Desk with an ing the enailing of "XME imber Mag Type [Messag S S S S S	file was processed. Ple CST / questions. 2" file attachments, th e Text	ease review the re he ".XML" is ann ID I 5000191178 ( 5000191178 ( 5000191178 (	ached as a *.1 ltem 0000000100 000000100 000000100	Output Result files are attached as "TXT" and "CSV" files. XT" extension. To use as an "XML" , please save the ".TXT" file with an "XML* extension Status Status Description ASDA Approved by SDA ASDA Approved by SDA	n.
This email is notification Submitted Date Time : Submitted User: ORDE Please contact the WBS Due to issues surroundin External Reference Nu WBSCMA000 WBSCMA001 WBSCMA003	n that your Order upload 2022-05-05 at 08:15:00 ERMAS0001 SCM Help Desk with an ing the emailing of "XMC imber Msg Type [Messag S S S S S S S	file was processed. Ple CST / questions. " file attachments, th e Text	ease review the re he ".XML" is attr ID I 5000191178 ( 5000191178 ( 5000191179 ( 5000191179 (	esults below. ached as a ".T ltem 0000000100 000000100 000000100	Output Result files are attached as "TXT" and "CSV" files. XT" extension. To use as an "XML", please save the ".TXT" file with an ".XML" extension Status Status Description SSDA Approved by SDA ASDA Approved by SDA ASDA Approved by SDA	a.
This email is notification Submitted Date Time : Submitted User ORDE Please contact the WBS Due to issues surroundin External Reference Nur WBSCMA001 WBSCMA001 WBSCMA003 WBSCMA003	n that your Order upload 2022-05-05 at 08:15:00 ERMAS0001 SCM Help Desk with any ing the emailing of "XME imber Mag Type Messag S S S S S S S S S	file was processed. Pie CST - questions. - " file attachments, th e Text	ease review the re he "XML" is atta- ID I 5000191178 ( 5000191178 ( 500019118) ( 5000191181 (	ached as a ".] ltem 0000000100 000000100 0000000100 0000000	Output Result files are attached as "TXT" and "CSV" files. XT" extension. To use as an "XML", please save the ".TXT" file with an ".XML" extension Status Status Description ASDA Approved by SDA ASDA Approved by SDA ASDA Approved by SDA ASDA Approved by SDA	10 1
This email is notification Submitted Date Time : Submitted User: ORDE Please contact the WBS Due to issues surroundin External Reference Nut WBSCMA000 WBSCMA000 WBSCMA002 WBSCMA003 WBSCMA005	a that your Order upload 2022-05-05 at 08:15:00 ERMA 50001 SCM Help Desk with an ing the exalling of "XME imber Mag Type Messag S S S S S S S S S S S S	file was processed. Pie CST - questions. C° file attachments, th e Text	ease review the re he ".XML" is ann ID I 5000191178 ( 5000191178 ( 500019118) ( 5000191182 ( 5000191182 (	ached as a ".7 ltem 000000100 000000100 000000100 000000100 000000	Output Result files are attached as "TXT" and "CSV" files. XT" extension. To use as an "XML" , please save the ".TXT" file with an "XML" extension Status Status Description ASDA Approved by SDA ASDA Approved by SDA ASDA Approved by SDA ASDA Approved by SDA ASDA Approved by SDA	а.

**11.** Access the email account linked to the WBSCM User ID used when performing the sales order update. Locate and view the WBSCM Notification email.

1) 🕣

(Note) The order upload results will be attached in CSV, TXT and HTM file formats.

**12.** The transaction is complete.



# RESULT

The SDA sales order has been updated by uploading an XML file. The XML file has been uploaded one of two ways:

- Less than 50 files Submitted online
- More than 50 files Submitted for background processing