



Welcome to our Processor Refresher Training for Web-Based Supply Chain Management or Web SCM.



Topics in Processor Training

- ❖ Topic 1 - Domestic Fulfillment Overview
- ❖ Topic 2 - Organization Administration
- ❖ Topic 3 - Domestic Order Management
- ❖ Topic 4 - Fulfillment Reporting

In this training, we will be covering the basics for Domestic Fulfillment, Organization Administration, Domestic Order Management and Fulfillment Reporting.

Business Partners	SDA-State Distributing Agency
Sold-to Party	Receiving Organization
Ship-to Party	Requisition
Org Admin	Sales Order
User Admin	Purchase Requisition
RA-Recipient Agency	Purchase Order

Here is a list of some frequently used terms in Web SCM and we will be discussing them in this training. We recommend that you become familiar with them as they are used frequently in the Web SCM environment.

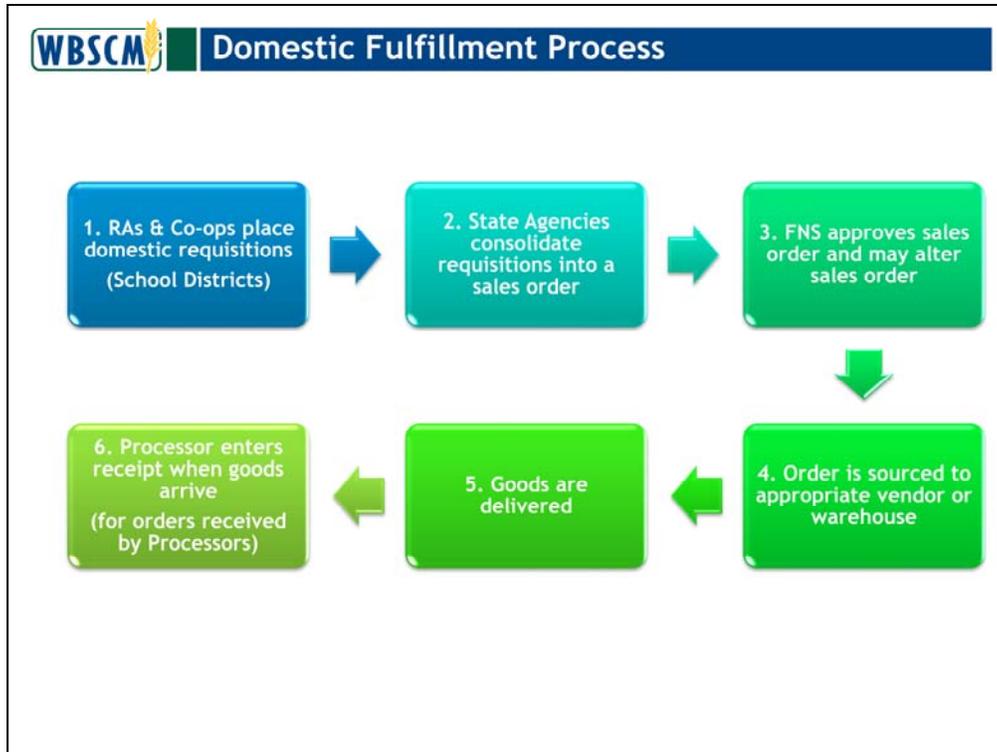


- Improve Procurement practices
- Decrease administrative costs
- Enable USDA to become more efficient
- Improve order cycle times...
- Leverage advanced planning

- The Web SCM objectives are to Improve Procurement practices & Technologies to increase efficiencies
- Decrease administrative costs associated with procurement & contract management, and technology
- Enable USDA to become more efficient at meeting customer needs
- Improve order cycle times, financial processing, and customer relationship management to reduce costs
- Leverage advanced planning and collaboration tools to enable USDA to match supply and demand more effectively and efficiently



•The Domestic Fulfillment process can be subdivided into smaller categories as seen in this diagram, including topics such as Organization Administration, Order Management, Complaints Processing, Recall Processing, and Warehouse Activities.



Domestic fulfillment begins when customers place domestic requisitions in Web SCM. It ends when the customer receives their order, and enters confirmation into Web SCM. Here is a high-level look at the domestic fulfillment process: (read box text)

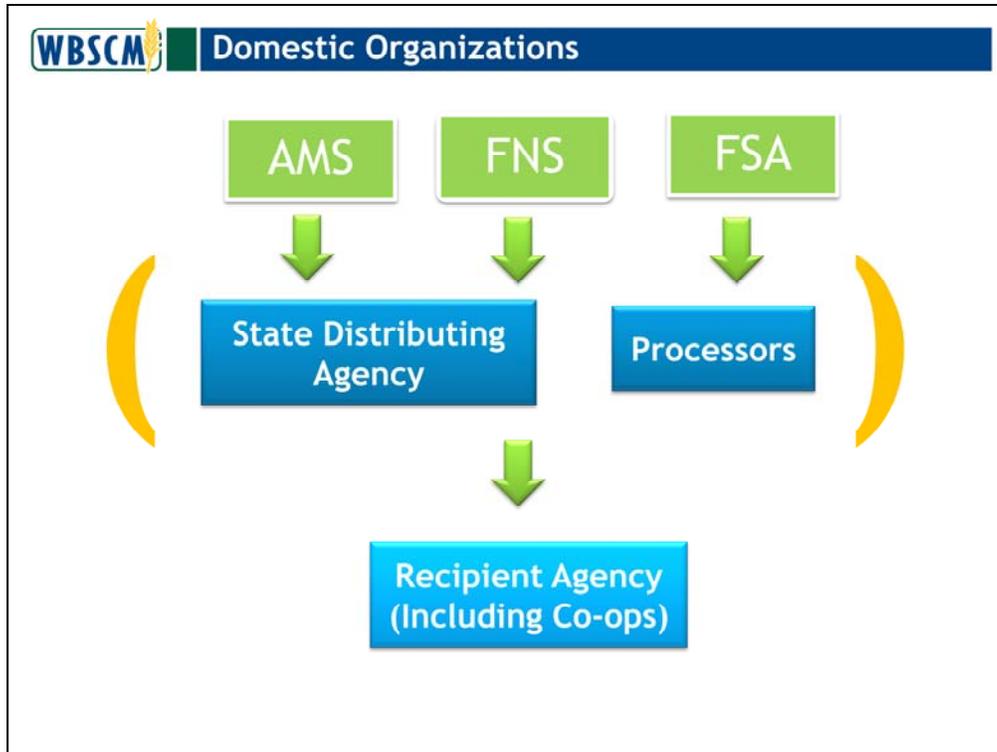
❖ Topic 2 - Organization Administration

- Lesson 1: Maintaining Organizations
- Lesson 2: Creating & Managing Users

Moving on to Organization Administration and Maintaining Organizations



Maintaining organizations has to do with maintaining the master data record for a business partner. “Business Partner” is another word for an organization in Web SCM and as we can see in this chart, they can be customers, vendors, transportation providers and ship-to parties such as warehouses and processors.



Before we discuss your specific responsibilities as an Organization Administrator, let's look at the layout of organizations within Web SCM. The diagram in this slide depicts the USDA organizational hierarchy and shows which USDA organizations sponsor other organizations in Web SCM.

Organization Administrators are responsible for:



This is a high level overview of the Web SCM Organization Administration process and the responsibilities of Organization Administrators.

Organization Administration is the process of creating and maintaining organizations and users in Web SCM. Organization Administrators are responsible for creating organizations, which may include multiple locations; creating users; and maintaining the organizations, hierarchy and users created.



Each Organization has a sold-to and/or ship-to role assigned to it.

Sold-to Party:

A Sold-to Party is an Organization that orders food. An Organization or State Agency may have multiple ship-to parties (including approved processors) that operate in their state.

Ship-to Party:

A ship-to party is the address where the goods will be delivered. Ship-To Parties, including processors, can have multiple addresses. For example, if you are a processor that runs six different plants, each plant would be represented by a different ship-to address and unique business partner id number. If you acquire a new plant in Web SCM, you will need to request a new identifier from the Food and Nutrition Service to allow Sold-To parties to send Goods to your new destination.



Lessons in Organization Administration

❖ Topic 2 - Organization Administration

- Lesson 1: Maintaining Organizations
- Lesson 2: Creating & Managing Users

Okay, let's move on to creating and managing users.

WBSCM

- To create an E-Authentication account, go to <https://www.eauth.usda.gov>
- Click Create an Account.

The screenshot shows a web browser window with the URL <https://www.eauth.usda.gov/instPages/index.aspx>. The page features a green header with the USDA logo and the text 'United States Department of Agriculture USDA eAuthentication'. Below the header is a navigation bar with links for 'Home', 'About eAuthentication', 'Help', 'Contact Us', and 'Find an LRA'. A sidebar on the left contains 'Quick Links' (What is an account?, Create an account, Update your account) and 'Administrator Links' (Local Registration, Authority Login). The main content area has a 'Welcome' section with text explaining the system and a link to 'Create an Account Page'.

Before we can discuss creating and managing users, we need to go over how to become a new Web SCM user. Becoming a Web SCM user is a two-part process. To become a Web SCM user, the new user who does not already have an existing e-authentication account must create their own e-authentication account. The Organization Administrator may not create the account on behalf of the new user.

To create the e-authentication account, the new user must go to the website www.eauth.usda.gov and in the last line of the Welcome section, click the link: **Create an Account**.

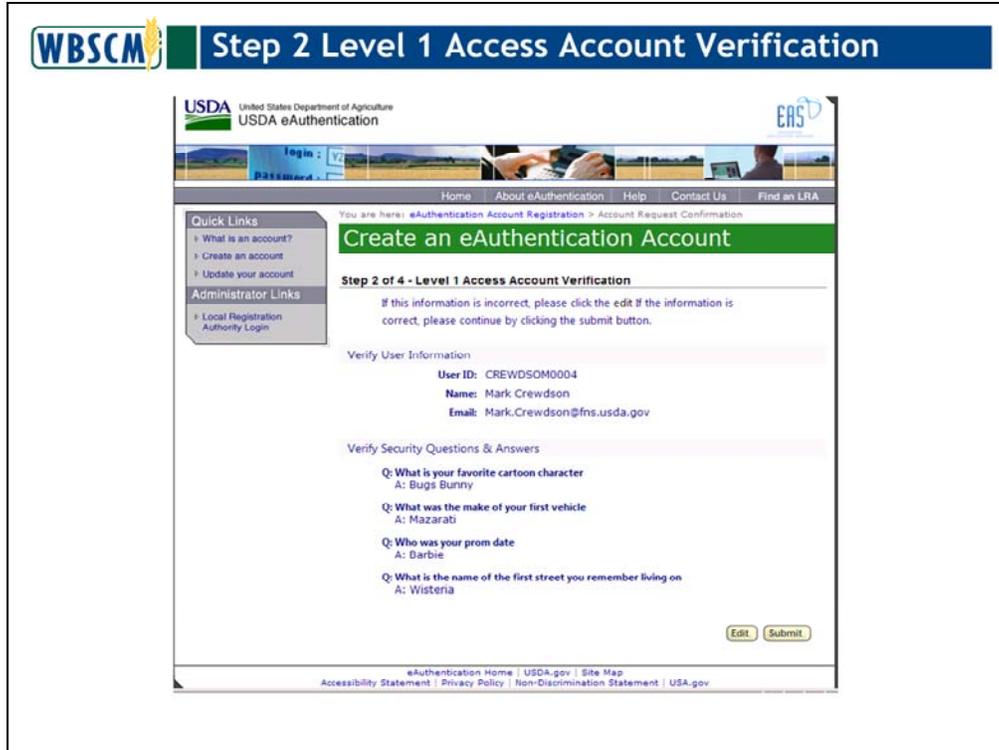
WBSCM **Creating an E-Authentication Account**

Click the Register for a Level 1 Account button

The screenshot shows the USDA eAuthentication website. At the top, there is a navigation bar with links for Home, About eAuthentication, Help, Contact Us, and Find an LRA. Below this is a section titled 'Create an Account - Getting Started'. The page is divided into two main sections: 'USDA Federal Employees, Contractors, & Affiliates' and 'USDA Customers - What Level of Access Do You Need?'. The 'USDA Customers' section is further divided into 'Request Level 1 Access to:' and 'Request Level 2 Access to:'. The 'Request Level 1 Access to:' section lists three bullet points: 'Visit a USDA web page that indicates a Level 1 account is necessary', 'Obtain general information about the USDA or its agencies', and 'Participate in public surveys for a USDA agency'. Below these bullet points is a button labeled 'Register for a Level 1 Account'. The 'Request Level 2 Access to:' section lists three bullet points: 'Submit official business transactions via the Internet', 'Enter into a contract with the USDA', and 'Submit forms or applications for the USDA via the Internet'. Below these bullet points is a button labeled 'Register for a Level 2 Account'. At the bottom of the page, there is a footer with links for 'eAuthentication Home', 'USDA.gov', 'Site Map', 'Accessibility Statement', 'Privacy Policy', 'Non-Discrimination Statement', and 'USA.gov'.

After clicking the link, you will be taken to the e-authentication account screen. There are two types of accounts that you can create.

If you need to create an e-authentication account as a processor, you will want to click on the button, "Register for a Level 1 Account".



The information you entered will be displayed for confirmation. Once you have confirmed your information, click the **Submit** button. You have just created your new user account in E-Authentication.

... And just in case anyone is wondering, that is not my real information in the displayed security answers!

WBSM **Step 3 Print Confirmation Email**

USDA United States Department of Agriculture
USDA eAuthentication

Home About eAuthentication Help Contact Us Find an LRA

You are here: eAuthentication Account Registration > Account Request Confirmation

Create an eAuthentication Account

Step 3 of 4 - Print Confirmation email

Account Created:

Your account has been created but you have one more step required to complete your registration!

Your confirmation email from eAuthHelpDesk@ft.usda.gov should arrive within 1 hour. Please follow the instructions in the email complete step 4 of your registration.

eAuthentication Account Information:

User ID: CREWDSOM0004
Email: Mark.Crewdson@fns.usda.gov

If after 24 hours you do not receive the confirmation email:

1. Check the email filters of your provider and email client.
2. Contact the ITS Service Desk at eAuthHelpDesk@ft.usda.gov or 800-457-3642 . Please provide your User ID, first and last name, and email address.

Please print this page for future reference.

eAuthentication Home | USDA.gov | Site Map
Accessibility Statement | Privacy Policy | Non-Discrimination Statement | USA.gov

After clicking Submit, the Confirmation Email screen appears informing you that you will receive a confirmation email within one hour. You may want to print the email, or keep the electronic version of it handy when you receive it, as you will need to follow its instructions in order to complete the last step of the e-authentication registration.

WBSCM **E-mail User Receives**

After user is created, account activation is required ▶

An email is sent to the new user!

After being notified by the e-authentication confirmation email that the user has an e-authentication account, the new user should click the ACTIVATE MY ACCOUNT link in the email after at least 10 minutes has elapsed to complete the Web SCM registration process. After clicking on the link, the user is granted real-time access to the appropriate systems.

Please note that when we say the user is granted access to the appropriate systems, we mean that perhaps a vendor would only have access to external procurement applications in Web SCM, a customer would have access to order-placing applications, and a recall specialist would have access to recalls applications and processors would have view only access to see orders coming into their plants and warehouses.

The e-authentication confirmation email also contains helpful links for updating your e-authentication User Account and for further assistance with your e-authentication account if necessary, including the information that would need to be included in an e-authentication Help Desk request.

WBSCM **Account Activated**

USDA United States Department of Agriculture
USDA eAuthentication

Home About eAuthentication Help Contact Us Find an LRA

You are here: [eAuthentication Account Registration](#) > [Account Activation](#)

Create an eAuthentication Account

Step 4 of 4 - Account Activated

Your account has been activated with Level 1 Access. Please wait 20 minutes from the time of activation before using the account.

eAuthentication Account Information:

User ID: CREWDSOM0004
Email: Mark.Crewdson@fns.usda.gov

Non-USDA Federal Employees Requesting Level 2 Access

If you are not a USDA Federal Employee and have requested Level 2 Access, you must visit a USDA service center for identity-proofing by a Local Registration Authority (LRA). [Find an LRA](#)

If you cannot find an LRA, contact the ITS Service Desk:
email: eAuthHelpDesk@ftc.usda.gov
Phone: 800-457-3642

[eAuthentication Home](#) | [USDA.gov](#) | [Site Map](#)
[Accessibility Statement](#) | [Privacy Policy](#) | [Non-Discrimination Statement](#) | [USA.gov](#)

After clicking the ACTIVATE MY ACCOUNT link, the Account Activated screen appears letting you know that your e-authentication account has been activated and that you will be able to use the account in approximately 20 minutes.

WBSM **WBSM Home Page**

www.usda.gov/wbscm

USDA
United States Department of Agriculture

About USDA | Ask the Expert | Contact Us | En Español

Topics | Programs and Services | Newsroom | Blog

Site Map | A-Z Index | Advanced Search | Help | Search Tips

You are here: Home / Web Based Supply Chain Management

I want to ...

- > [WBSM Login](#)
- > [WBSM Training Site](#)
(Sponsoring Agency assigned ID required for access)

Resources

- > [AMS](#)
- > [FAS](#)
- > [FNS](#)
- > [FSA](#)
- > [USAID](#)

Web Based Supply Chain Management

IMPORTANT WBSM NOTICES

WBSM will be unavailable due to federal fiscal year end processing beginning at 4:00 PM on 9/28/2012. The outage is expected to last until approximately 12:00 PM Eastern Time 10/1/2012. This schedule may be adjusted to complete procurement requirements. If changes are necessary they will be posted as soon as they are available.

A notification will be posted on Monday 10/1/2012 when all activities are completed and WBSM is available.

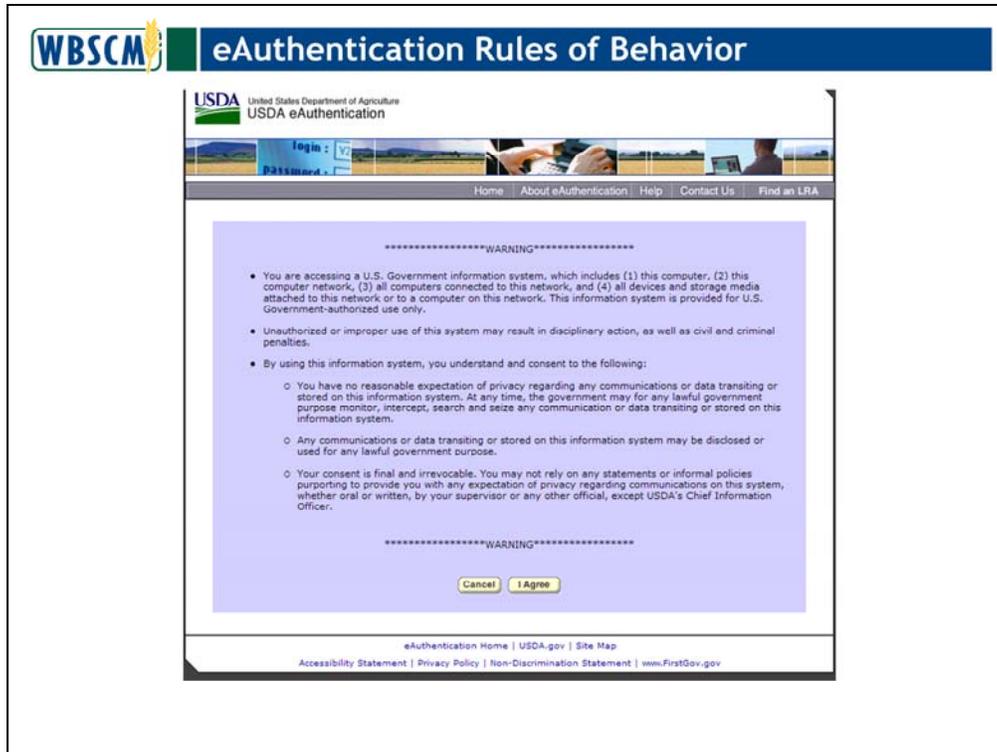
For more Agency information, please visit one of the Agency website links to the left.

USDA.gov | Site Map | Policies & Links | Our Performance | Report Fraud on USDA Contracts | Visit OIG | Plain Writing | Open FOIA | Accessibility Statement | Privacy Policy | Non-Discrimination Statement | Information Quality | USDA Recovery | USA.gov | Whitehouse.gov

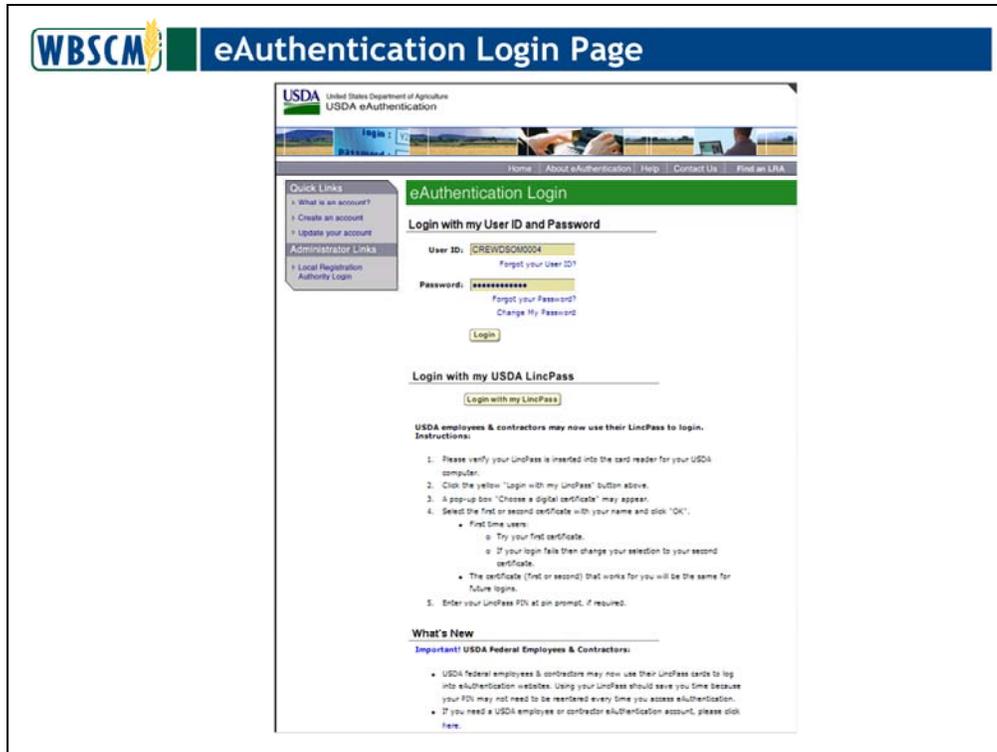
The link for the Web SCM Home Page is: www.usda.gov/wbscm. Once there, you may click on the Web SCM Login link in the top left corner in the "I want to . . ." links box.

The screenshot displays the 'WBSM Registration Process' page. At the top, there is a blue header with the 'WBSM' logo and the text 'WBSM Registration Process'. Below this, a dark blue bar contains the 'USDA United States Department of Agriculture' logo and 'WBSM User Validation' on the left, and the 'WBSM' logo on the right. The main content area is titled 'WBSM Rules of Behavior'. A yellow box contains the following text: 'Rules of Behavior (Version 1.0) Web Based Supply Chain Management (WBSM) participants must understand and agree to their information security responsibilities to be allowed access to the WBSM system. WBSM rules of behavior for all participants include, but are not limited to, the following: 1. Participants shall understand and comply with United States Department of Agriculture (USDA) policies and procedures, and with federal, state, and local laws. 3. Users shall protect their UserIDs and passwords from disclosure.' Below the yellow box are three radio buttons: 'Accept' (which is selected), 'Reject', and 'Submit'. A 'Submit' button is also present. At the bottom, a note reads: 'Please review the WBSM Rules of Behavior. Clicking Accept will continue the validation process.'

When you go to sign into Web SCM for the first time, you will be directed to the following screen. To access the system, you will need to read the Web SCM Rules of Behavior, select the **Accept** radio button and then click the **Submit** button.

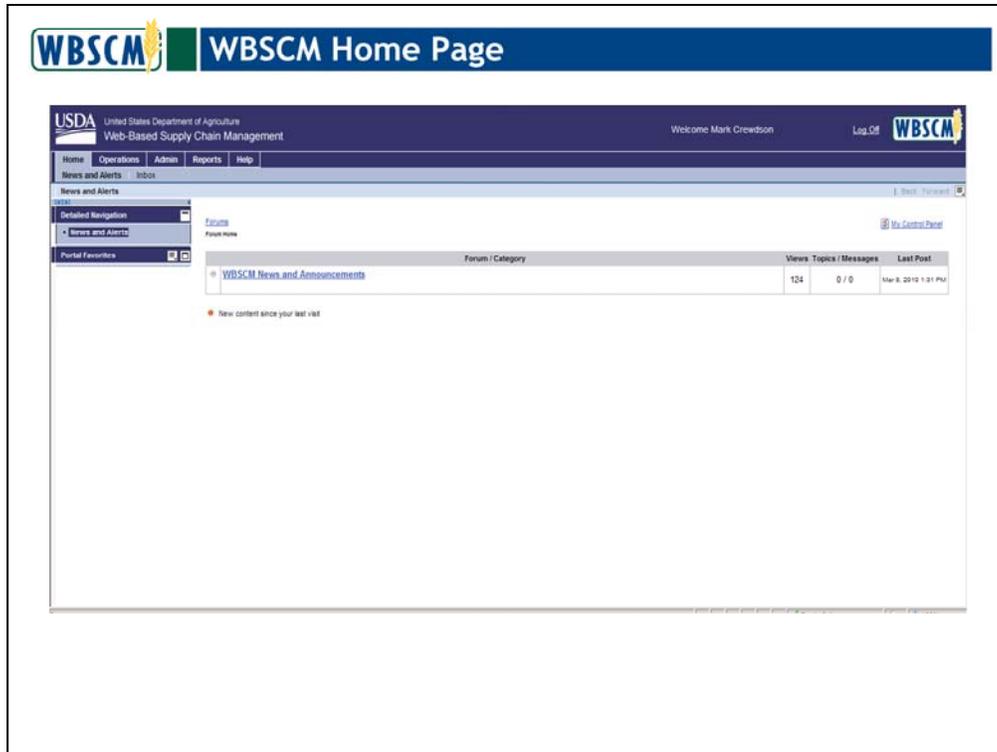


After clicking Submit, the Terms & Conditions display. This occurs every time you login to Web SCM. You will want to click the **I Agree** button to access the e-authentication login screen.

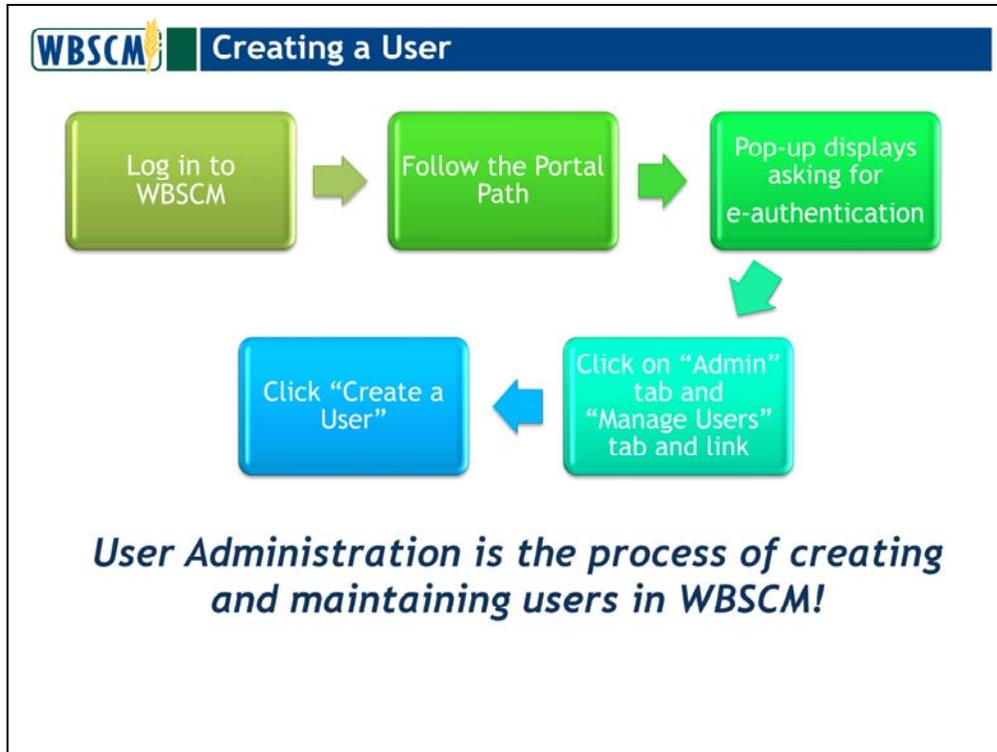


On the e-authentication login screen, enter your e-authentication User ID and Password, and click **Login**.

If you forget your User ID, forget your Password, or need to change your password, click the appropriate links under the User ID and Password text boxes to resolve your login issues.



After successfully logging in on the E-authentication Login screen, you will be redirected to Web SCM where you can begin transactions using the Menu at the top of the screen and/or the Detailed Navigation link(s) on the left side of the screen.



Now for the second part of the process. A user with an E-authentication account still cannot access Web SCM unless they are also made a user in Web SCM. User Administration is the process of creating and maintaining users in Web SCM. This includes Organization Administration users, User Administration users, and USDA and external users.

To create a user, the Organization Administrator logs into Web SCM via the E-authentication Login screen, clicks on the Admin tab, Manage Users tab and Manage Users link and clicks the Create a User button.

- Use this screen to create new Users, Organization Administration Users, & User Administration Users
- You can create users for your organization and sub-organizations

First Name	Last Name	Last Login Date
Albert	LOW	2012-09-11 12:19:29
Albert	LOW	2012-09-11 12:19:14
KB	SHRTO	2012-09-11 14:40:22
Yann	BOU	2012-09-11 12:21:16

User Details

Search: Customer: 0000007704

First Name: Phone:

Last Name: Fax:

Email: Mobile Phone:

Title:

Home Address:

City:

Zip Code:

Country:

State/Province:

Time Zone:

Once on the user creation screen, the Organization Administrator completes the user information required and clicks the Save button. All asterisked fields must be completed and also important to note, the User Last Name and Email address provided in the Personal data tab MUST match the E-authentication Last Name and Email address because the process involves using both e-authentication and Web SCM (two systems that interface with one another).

All types of users can be created using this process. After saving the new user, an email is sent to the new user asking to (a) create an e-authentication account if one does not exist, and (b) confirm their identity in Web SCM

If you are assigned the Organization Administrator or User Administrator role, you will have the ability to create, display, and modify users and will be able to see all users within your organization. For example, if you are a Processor Organization Administrator, you will be able to see all users for your company, you will be able to create, display, and modify these users and, as an Organization Administrator, you will also have the ability to create other Organization Administrators and User Administrators.

We will demonstrate all the functions of the Organization Administrator later in this training.

WBSCM **Personal Data tab**

User Details

Personal data | Role data | Admin data

UserID: CREWDSOM0004 Company: 0005001718

First Name: * Mark Phone:

Last Name: * Crewdson Fax:

Email: * Mark.Crewdson@fns.usd Mobile Phone:

Title:

Street Address:

City:

Zip Code: 22302

Country: * USA

State/Province:

Time Zone:

Modify User Delete User

You can view personal data about the user from the Personal data tab!

In the **Personal data** tab you can enter the new user's personal information. The UserID is system-generated and cannot be modified manually.

Once the system generated USERID is created in Web SCM, you can ignore it. You will not need this information to log into the system. The E-Authentication ID and associated Password are what you need to log into Web SCM.

WBSM Role Data tab

User Details

Personal data **Role data** Admin data

Current Roles

<input type="checkbox"/>	Org Admin - Domestic Ship-to
<input type="checkbox"/>	View-Only - Domestic Ship-to
<input type="checkbox"/>	User Admin - Domestic Ship-To
<input type="checkbox"/>	
<input type="checkbox"/>	

Row 1 of 3

Modify User Delete User

You can view role data about the user from the Role data tab!

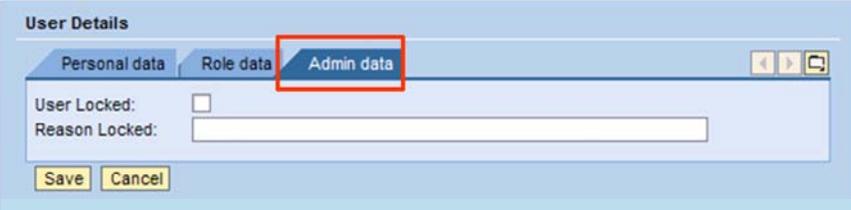
From the **Role data** tab, you can select the appropriate roles for the user. These roles correspond to security access that the user has, and determines what the user can do or see in Web SCM.

Organization Administration Users – Organization Administrators are users that have authorization to modify their own organizations. These users are authorized to create organization administrators, user administrators, and users for their own organization.

User Administration Users – User Administrators are users that have authorization to create regular users within their organization. User Administrators may also create other user administrators in their organization.

Users – Unless they have organization administrator or user administrator authorizations, these individuals are unable to create, modify, or display users. They may only display their own user profiles.

WBSCM Admin Data tab



You can view user administration data about the user from the Admin data tab!

From the **Admin data** tab, you can lock a user out of the system. To do so, check the **User Locked** checkbox and provide a reason for the lockout in the **Reason Locked** field.

You might use this feature if an employee has changed roles in your company and no longer needs access, or if you find abuse.

Finally, once the **Save** button is clicked when creating a new user, the new user will receive an e-mail with instructions on setting up their e-Authentication account and registration.

When displaying a user in WBSCM, use the following procedure:

The screenshot shows the 'Manage Users' interface in WBSCM. At the top, there are navigation tabs: Home, Operations, Admin, Reports, and Help. Below these are sub-tabs: Manage Users, Organization Maintenance, and Master Data. The main content area is titled 'Manage Users' and shows a search interface for 'K & B PIZZA'. A table lists users with columns for First Name, Last Name, and Last Login Date. The user 'Mark Crewdson' is highlighted. Below the table, there are tabs for 'Personal data', 'Role data', and 'Admin data'. The 'Personal data' tab is selected and highlighted with a red box. Callout 1 points to the 'Mark Crewdson' user in the table, and callout 2 points to the 'Personal data' tab.

First Name	Last Name	Last Login Date
Mark	Crewdson	2012-09-11 12:15:25
Albert	Lee	2012-09-11 13:51:14
Albert	Lee	2012-09-11 14:40:22
Test	SSO	2012-09-11 13:21:10

(Demo: Do Create and display user and maintain organization demo.)



Lessons in Domestic Order Management

❖ Topic 3 - Domestic Order Management

- Lesson 1: Maintaining Sales Orders
- Lesson 2: Processing Receipts

Let's move on to Domestic Order Management and Maintaining Sales Orders.



Let's review some of the key documents that are created in the Web SCM order process. These include domestic requisitions, sales orders, purchase requisitions, and purchase orders.

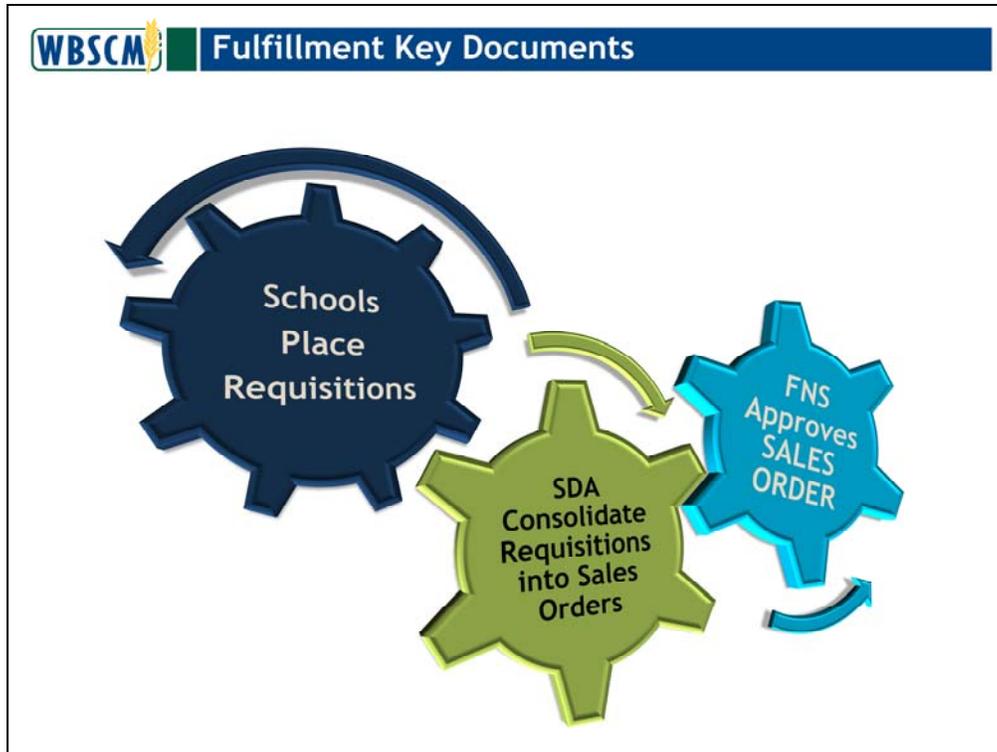


**Sales
Order**

- Redonation Sales Order
(Transfers)

The core of fulfillment in Web SCM revolves around documents known as sales orders. Recipient Agencies (RAs) and Co-operative Organizations (Co-ops) are NOT authorized to create sales orders in Web SCM. They can, however, create requisitions which must be approved by the State Distributing Agency.

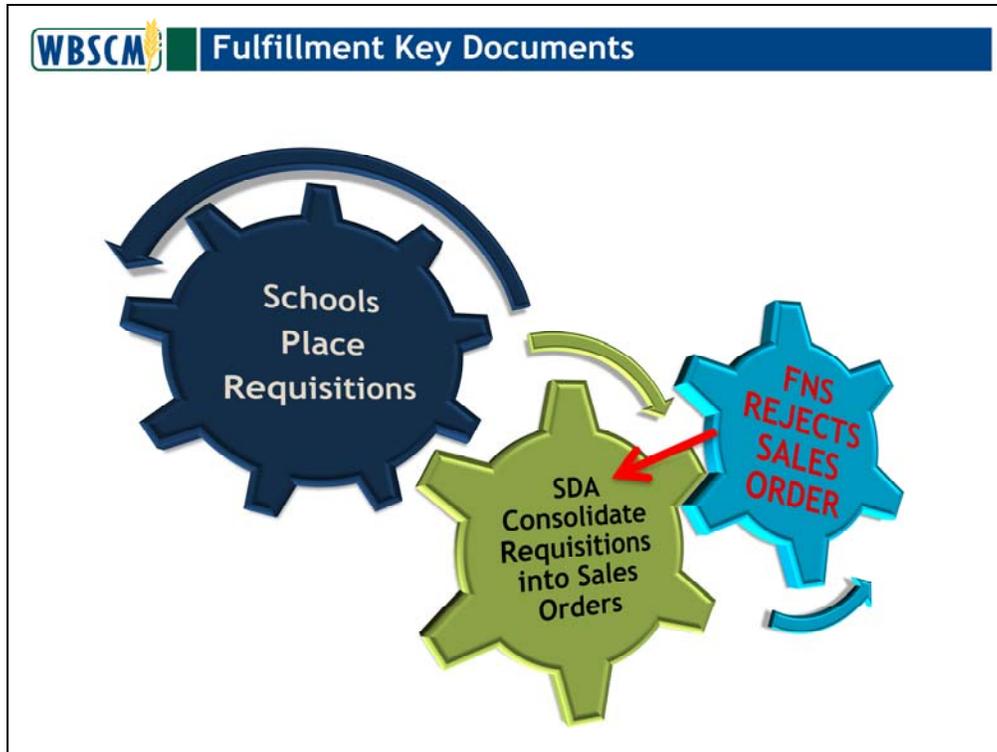
The domestic sales order is the most frequent type of order. Occasionally, however, other types of orders are processed in Web SCM to accommodate unique program needs. Three types of other orders which you might see in Web SCM are emergency sales orders, offshore sales orders or redonations, also known as transfers.



So, let's discuss the order flow.

School Recipient Agencies place a requisition for goods. This can be done by logging into the Portal, searching the Web Catalog, and adding items to the shopping cart. When the requisition is ready for approval, it is escalated to the appropriate State Distributing Agency. Not all RAs are using Web SCM. Some are using state ordering systems.

State Distributing Agencies receive all requisitions from the Recipient Agencies beneath them and are responsible for approving or rejecting each requisition and for consolidating all approved requisitions into sales orders. State Distributing Agencies are authorized departments within a state, such as the Department of Human Services, Dept of Agriculture, or Department of Education. The SDA may use the discussion forum functionality to maintain full truckload requests and communicate with other SDAs on the status of an order. SDAs who use their own ordering systems for their RAs have the capability to upload orders into Web SCM. The newly-created Sales Orders are sent to FNS for approval or rejection and if approved, they are sourced to a vendor.



If an FNS Order Manager rejects the sales order, the heading on the sales order will read "Returned by FNS." Usually this is only done in situations where the item cannot be procured, the SDA has exceeded its entitlements budget, or the SDA has notified FNS of an error in the order and asked them not to fulfill it.

When the sales order is returned to the SDA, the SDA Order Manager can change the following fields:

- Quantities
- Delivery date
- Ship-to (delivery location)

The SDA Order Manager can also cancel the order or unallocate requisitions from the sales order.

Concerning the inability to procure and shortfalls, this does happen periodically with bulk orders and AMS and FSA have been pretty good about communicating with FNS in these situations. You will be able to see the order status change in WBSCM when orders have been returned.

After the SDA approves and consolidates requisitions, and submits the sales order (all done in one simultaneous process), it goes to FNS for approval

FNS Order Manager may approve or reject. (CLICK) Common reasons for rejection include:

- Item cannot be procured / shortfall situation
- SDA exceeded its entitlements budget
- SDA notified FNS of an error and asked that it be returned



After FNS approves the sales orders they become purchase requisitions and are sent to the Agricultural Marketing Service or Farm Service Agency who will begin the bidding process. Once a contract is awarded to a supplier for goods, the purchase requisition becomes a purchase order.

**Sales
Order**

- Standard Domestic Sales Order
- Domestic Emergency Sales Order
- Domestic Offshore Sales Order
- Redonation Sales Order
(Transfers)

So we've discussed some of the possible paths a requisition and sales order can take in Web SCM. (Click)

Now we will talk about Redonations. Occasionally, a redonation sales order (also known as a transfer) is created by an FNS Order Manager when inventory needs to be transferred. For example, when one state has surplus inventory at a processor that they can't use, they are able to redonate or transfer that inventory to another state willing to take it. In rare cases like this, FNS creates a Redonation Credit Memo Request in order to increment the donating customer's entitlement with the appropriate balance (so they are refunded for the goods they are redonating) and creates a Redonation Sales Order in order to decrement the recipient customer's entitlement with the appropriate balance (so they are charged for the goods they are receiving). The entire purpose of this sales order type is to balance the entitlement budgets accordingly. This is used as a last resort when inventory needs to be transferred from one state to another.



Discussion Forums are used by Business Partners to receive news and announcements from FNS. FNS will post information such as policy changes or recalls for their Business Partners to view. The discussion forums can be found on the main (home) page which is the page to which you are redirected when you login to Web SCM via E-authentication. Processors have view-only access to Discussion Forums and cannot post their own information there.



Lessons in Domestic Order Management

❖ Topic 3 - Domestic Order Management

- Lesson 1: Maintaining Sales Orders
- Lesson 2: Processing Receipts

Okay, moving on to Processing Receipts



Enter a Single Shipment Receipt

- **Shipment receipts, i.e., Goods Receipts, are entered when materials are received by the customer or processor. The following can enter Goods Receipts:**
 - **Ship-to Organization Administrator (Processor)**
 - **State Distributing Agency/Recipient Agency Order Manager**

The shipment receipt or Goods Receipt, is a means of confirming the processor received the products ordered by the State Distributing Agency on behalf of the schools. The Goods Receipt provides details on what was received, when, how, who signed for it, and if there was any damage, shortage or overage.

The Goods Receipt is also used for the 3-way match verification process between the warehouse, the vendor, and the customer.



Enter Damaged Goods Information

- **The customer/processor is responsible for entering the following information into the Goods Receipt if the goods are damaged:**
 - **Good Quantity**
 - **Damaged Quantity**
 - **Descriptive information about the Damaged Quantities received**

One of the purposes for entering the Goods Receipt is to track where the order is within the delivery process. Has it left the vendor? Has it reached the processor's plant?

The second purpose is to verify the quality of goods received. The processor is responsible for entering the following information about the goods:

Good Quantity – This is the actual inventory that has been received that is not damaged.

Damaged Quantity – This is the inventory that has been damaged due to transport, unloading, or improper storage.

Description – This is a free text field where the customer may enter information about the shipment. For example, if there was damage, this field is used to describe the damage, whether the damage poses a food safety concern, and whether they are requesting a refund or replacements.

As is the case for any new system, we have discovered some issues in Web SCM and in particular, some issues concerning receipting and want you to know that we are currently working with the American Commodity Distributors Association (ACDA) Processing Committee on resolving these issues.



How To Submit a Complaint

- If the processor receives product that is defective in some way, they need to contact the SDA who ordered the product to start a complaint in our system.
- The SDA will enter a complaint into WBSCM and a Complaint Specialist will contact the Processor to resolve the complaint.



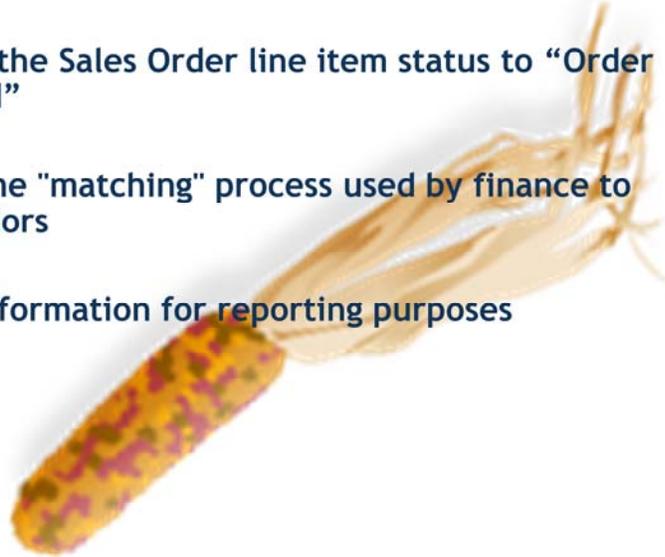
(Read the slide)

- Goods Receipt (GR) information entered by the customer helps facilitate payment to the commodity vendor
- If a customer's receipt is not entered, FSA and AMS Contracting Officers can enter GR information based on a signed Proof of Delivery (POD) document uploaded into the system with the vendor invoice

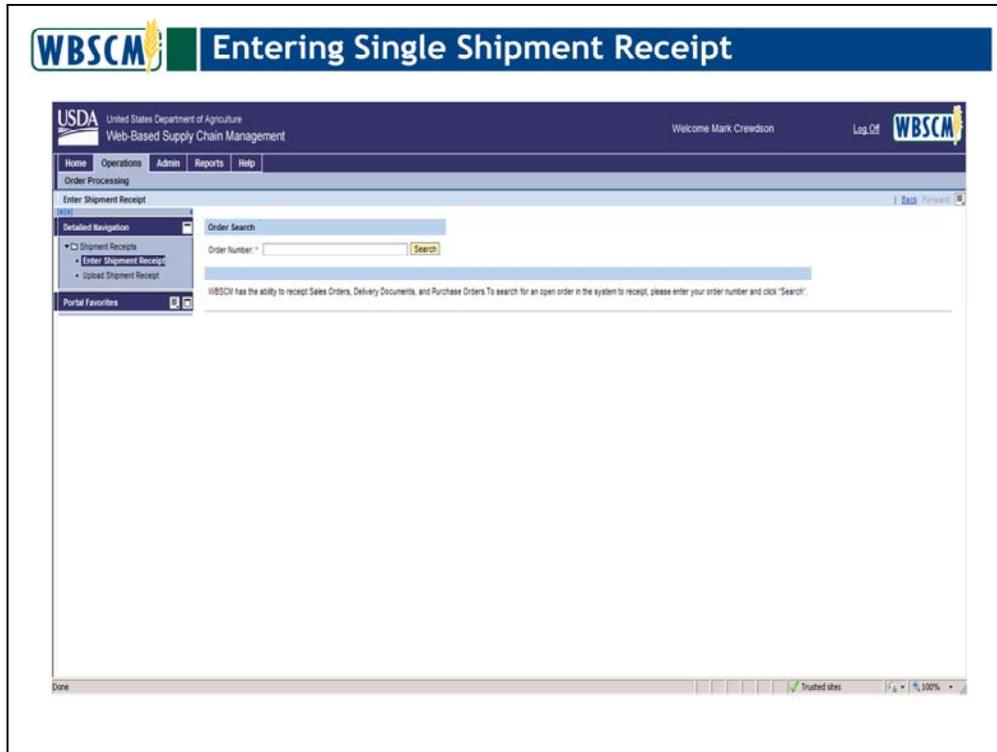


Inaccurate and/or untimely goods receipting can negatively impact Payment to the Commodity Vendor! Shortly, we will discuss other important reasons why receipting accuracy is so critical.

- Processing a Goods Receipt does the following:
 - Updates the Sales Order line item status to “Order Received”
 - Part of the “matching” process used by finance to pay vendors
 - Stores information for reporting purposes



(Read the slide)



The processor is responsible for entering a shipment receipt in Web SCM when goods are delivered. To do this in Web SCM, click on the: **Operations** tab >, **Order Processing** tab >, **Shipment Receipts** folder > and **Enter Shipment Receipt** link.

Enter the Order Number for the order you wish to receipt. This can be the sales order number, purchase order number, or delivery document number.

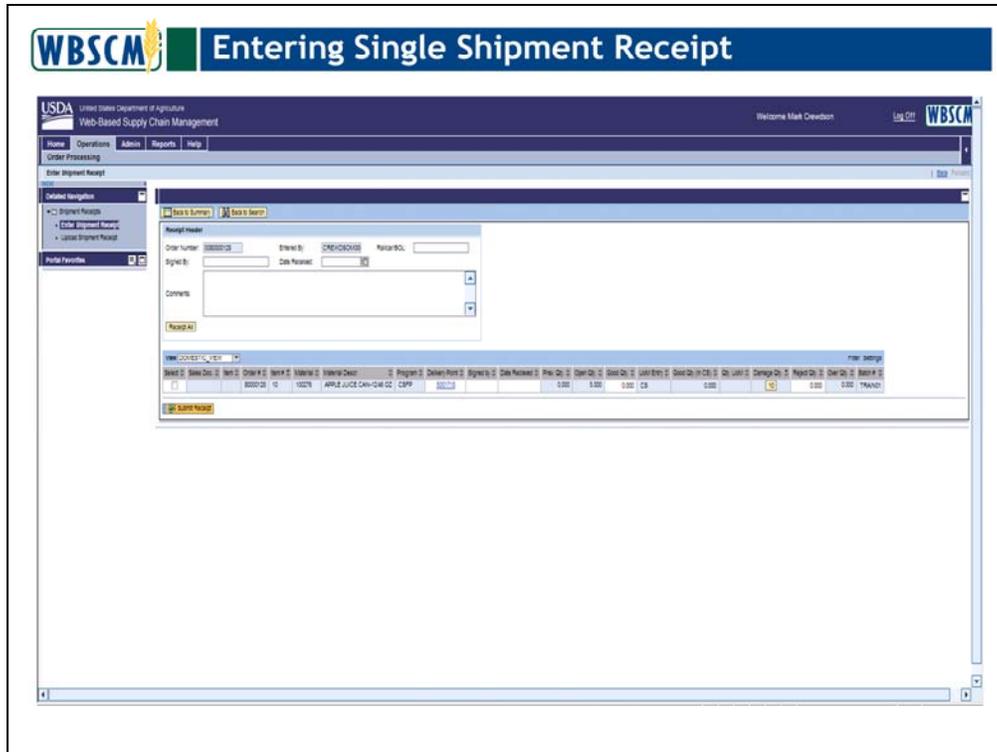
Click **Search**. Searching by the three types of documents discussed will bring up a list of purchase orders linked to the number you entered.

The screenshot displays the 'Entering Single Shipment Receipt' page in the WBSM system. The interface includes a top navigation bar with the USDA logo and 'Web-Based Supply Chain Management' text. A secondary navigation bar contains links for Home, Operations, Admin, Reports, and Help. The main content area is titled 'Associated Order Summary' and features a table with the following data:

Sales Doc #	Assoc. Doc Type	Assoc. Order #
100001815	Outbound Delivery	000000128

Below the table, there are pagination controls showing 'Row 1 of 1'. A search bar with a 'Back to Search' button is located in the top right corner of the main content area.

After clicking Search, a table displays showing all purchase orders that match your search criteria. Click the link for the line item you wish to receipt.



Within the order, there may be multiple line items. Select the line item you wish to receipt, by checking the checkbox in the **Row** column.

Enter the following fields:

- **Signed By:** Person at the customer organization who signed for the delivery
- **Date Received:** Date on which the delivery was signed for
- **Railcar/BOL:** Document number for the bill of lading
- **Comments:** Free text field for entry of comments about the delivery

Click **Submit Receipt**. If you wish to receipt and have checked the checkbox for all line items on the order, and there were no damages or shortages, click **Receipt All**. It is important to note that information added to the Receipt Header will only populate line items if you click Receipt All.

Processors need to accurately receipt on the Bill of Lading as they receive product into the warehouse, in Web SCM and in their Monthly Performance Reports, so that the receipt data entered at the destination agrees in all three places. This has a significant impact on reporting which we will cover later in the training.

WBSCM **Entering Single Shipment Receipt**

Back Forward

Filter Settings

am	Delivery Point	Signed by	Date Received	Prev Qty	Open Qty	Good Qty	Lot Entry	Good Qty (in CS)	Ct UoM	Damage Qty	Reject Qty	Over Qty	Batch #
2	5020718			0.000	0.000	0.000	CS	0.000		10	0.000	0.000	TRAIN01

If you have received damaged goods, you will want to indicate that on the receipt by clicking the **box** in the damaged quantity column . . .

WBSCM **Entering Single Shipment Receipt**

Enter Damage Details Document NO: 0080000128 Item NO: 000010

Damage Info

Damage Quantity:

When Discovered **Carrier Info**

Before Unloading: Agent Name:

During Unloading: Refrigeration Equipment Running:

After Unloading: Carrier Present:

Unit Temp(F):

Interior Temp(F):

Commodity Temp(F):

Miscellaneous Details

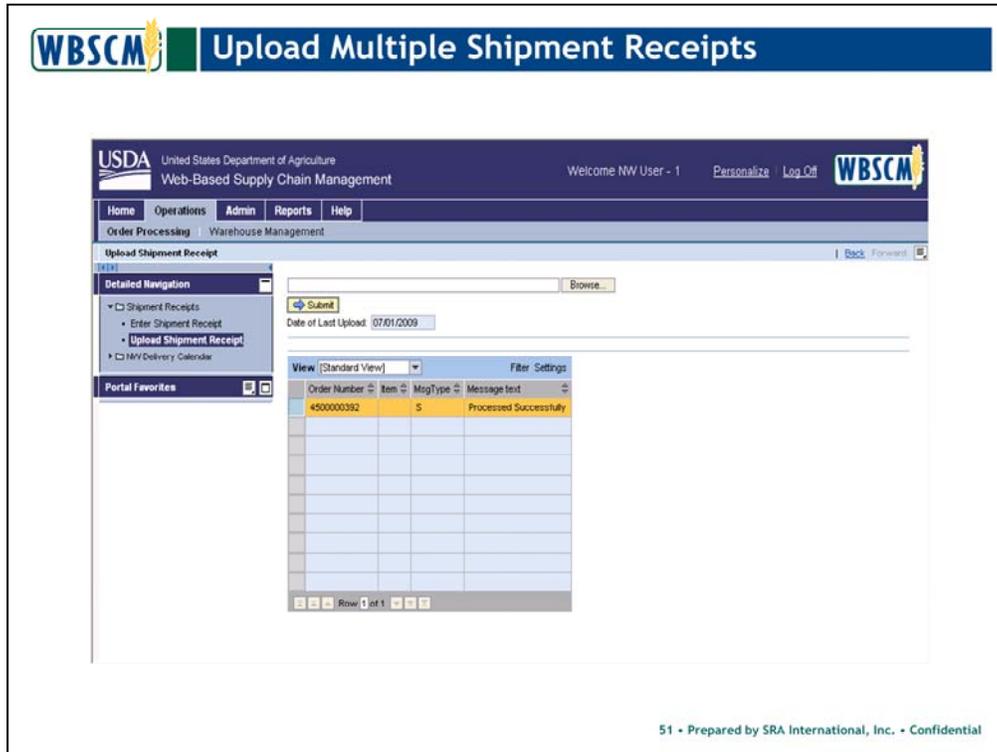
Comments:

OK

Enter the information about the damaged goods including the quantity damaged, when it was discovered, carrier information, and any miscellaneous details. Then click the OK button to submit the form.

- Processors can upload batches of shipment receipts consisting of a delivery document or an entire purchase order
- A batch of shipment receipts is uploaded to WBSCM via an Extended Markup Language (XML) or Comma Separated Variable (CSV) file
- If an error in format is encountered during uploading, the line is returned to the upload user with one of the following statuses:
 - Status - Error with Receipted PO
 - Status - Error with Receipted Line
- All correct line items will be processed

Web SCM allows for warehouse personnel to upload an Extended Markup Language (XML) or Comma Separated Variable (CSV) file containing goods receipt data in lieu of manually entering each line item in Web SCM. This process is beneficial to the warehouse as personnel often enter this data in other systems as well, and it is much easier to simply transfer the file than to redo the manual entry. Orders must exist for the warehouse and a shipment receipt XML or CSV file in the proper format must first be created.



To upload a shipment receipt batch file, use the following Portal path: **Operations** tab > **Order Processing** tab > **Shipment Receipts** folder > **Upload Shipment Receipt** link.

Click **Browse**, and locate the shipment receipt batch file you desire to upload.

Click **Submit**.

Once the upload finishes processing, the orders from your file will populate in the table.

The order data fields that will display in the table once the upload finishes processing are the same fields that must be included in the XML or CSV file.

As the Upload of Multiple Receipts is beyond the scope of this basic training session, we will not be building or demonstrating the multiple shipment receipting process today.



Topics in External Fulfillment Domestic

- ❖ Topic 1 - Domestic Fulfillment Overview
- ❖ Topic 2 - Organization Administration
- ❖ Topic 3 - Domestic Order Management
- ❖ Topic 4 - Fulfillment Reporting

Fulfillment Reporting

EXT300-SDA

Order Management



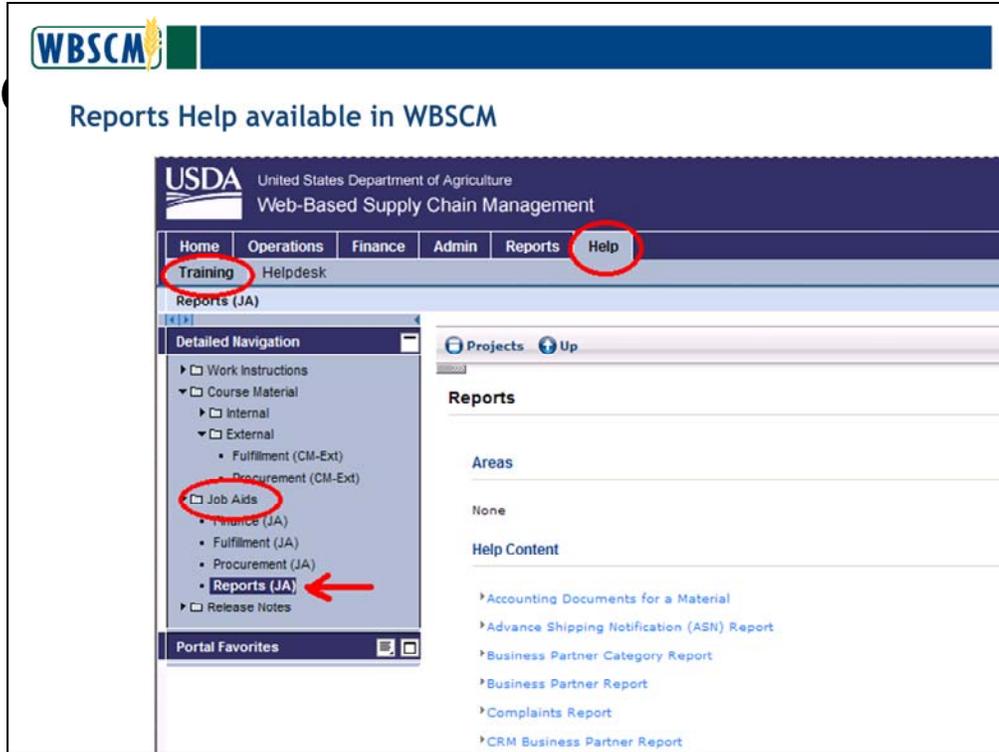
The slide features the WBSCM logo at the top left. The main heading is "Reports available at your fingertips through WBSCM". Below this, there are two main visual areas. On the left, a smaller inset shows a 3D bar chart with orange bars of increasing height, set against a background of an industrial facility. On the right, a larger, more complex 3D visualization includes a pie chart with segments in green, yellow, purple, and blue, and a 3D bar chart with blue bars of varying heights. A vertical axis on the right side of this visualization is labeled with values 0, 50, 100, 150, and 200. A horizontal axis at the top of the 3D bar chart is labeled with values 90, 120, and 150. The overall background of the slide is a light blue gradient with faint industrial imagery.

Up to now, we have discussed creating, modifying, and viewing domestic requisitions and information related to completing a domestic sales order.

Now we will focus on built-in reports available to you through Web SCM.

EXT300-SDA

Order Management



Before going further, we do want to mention that help is always available for running the various reports by clicking on the HELP tab, the Job Aids folder and Reports. You'll find job aids for many Web SCM reports under this link.

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Order Management



A few reports that can be created through Web SCM are the Received Shipment Report, Delivery Order Status Report, List of Materials, Material Pricing Report, Requisition Order Status Report and User Security Report.

As we discussed earlier, three security access roles are provided in Web SCM (Organization Administrator, User Administrator, and View Only). All three roles can access reports, however view only roles do not have access to the User Security Report.

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Order Management



The Received Shipment Report provides detail on any shipments that have been receipted including when the orders were received, the quantity that was received, and if there are any overages, or short/damaged quantity. Users are required to enter at least one of the following: Delivery Date, Order Number, or Shipment Receipt Date. The Status field is pre-populated with E0001, ensuring that your results contain only receipted orders. Also, by default, the report will include redistribution and redonation documents in the result, but you have the option **NOT** to include them.

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Order Management



The Order Status Report provides USDA consolidated sales order information and can be used to monitor the status of these orders as they are submitted, canceled, placed on an invitation, purchased, shipped and received. Users are required to enter at least one of the following: Delivery Date, Order Number, or Shipment Receipt Date.

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Order Management



The List of Materials report shows the list of currently available USDA Foods. If no selection criteria are entered, all materials currently available in Web SCM will be displayed. The report will display one record for each material per plant, that is if a material is available in more than 1 plant.

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Order Management



The Material Pricing Report provides information about the current prices for all USDA Foods. You will need to use Variant "Z1" for USDA and condition types ZCOS (USDA Cost) or ZLAP (Last Average Purchase Price). The report always defaults the validity period from today's date till 12/31/9999.

Notes:

Path: Admin > Master Data > Material > Material Pricing Report

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Order Management



The User Security Report gives Organization Administrators the ability to monitor the users within their organization. The User Security Report lists all of the users available within a given organization as well as the roles they have assigned.

Notes:

Path: Admin > Manage Users > User Security Report

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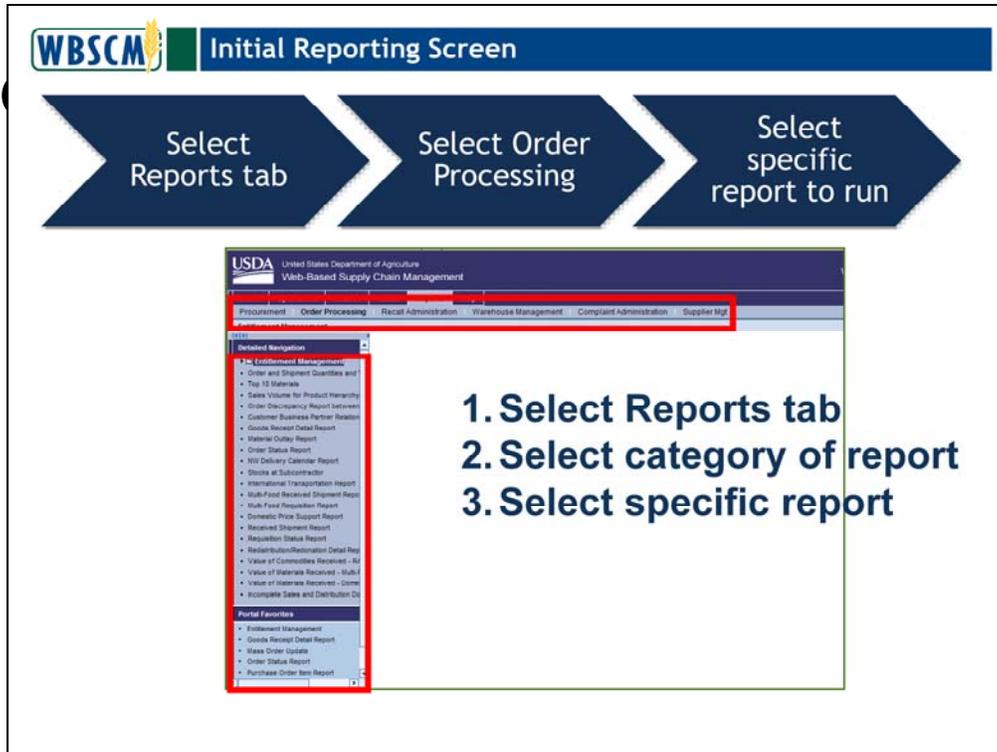
Order Management



The Requisition Status Report provides the user with a status on each requisition line item, as well as follow-on document information (like the Sales Order & Purchase Order Numbers for corresponding documents). If the State Distributing Agency has Web SCM rolled down to their schools, then a Requisition Status Report can be used to view the allocations within that state.

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Order Management



The diagram illustrates the process of selecting a report on the Initial Reporting Screen. It features three sequential arrows: 'Select Reports tab', 'Select Order Processing', and 'Select specific report to run'. Below this, a screenshot of the USDA Web-Based Supply Chain Management interface is shown. The 'Order Processing' tab is selected in the top navigation bar. A sidebar menu is open, showing a list of reports under 'Detailed Navigation' and 'Portal Favorites'. A red box highlights the 'Order Processing' tab in the navigation bar and the 'Detailed Navigation' sidebar. To the right of the screenshot, the following steps are listed:

1. Select Reports tab
2. Select category of report
3. Select specific report

From the initial Reporting screen, you can select from which category you would like to view reports. Available categories are dependent upon the security permissions associated with your User ID.

After defining the reporting category, select from the side bar the type of report that you would like to run.

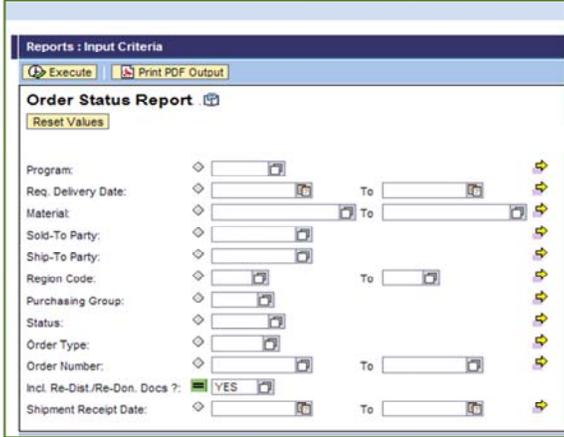
EXT300-SDA

Order Management

WBSCM Wildcard Search

Use * in place of unknown values to find a display of values you can choose from.

Example: Type '10*' for an unknown Sold-To starting with '10'.



The Report Criteria screen is where you enter your selection criteria for a specific report. For example, you could indicate on this screen that you would only like to view orders placed during a specific date range or orders that were already approved and delivered, etc.

If you know the value for a particular field, you may enter it in the field. If you do not know the exact value, you can perform a **wildcard search**. A wildcard search uses an asterisk in place of unknown values. For example, if you wish to display sold-to parties that start with "10" type "10*" in the Sold-To Party field. By typing an asterisk, you are indicating that anything that starts with 10 should be included in the results (regardless of which numbers come after it).

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Order Management

The screenshot displays the WBSM Matchcode Search interface. The main window is titled 'Matchcode Search' and contains a 'Detailed Navigation' pane on the left and a 'Reports : Input Criteria' section on the right. The 'Order Status Report' is selected, and the 'Program' field is highlighted in red. A callout box points to the matchcode button next to the 'Program' field, stating: 'Matchcode Search Functionality lets you display possible values for field'. Below the main window, a 'Value List' pop-up is visible, listing various programs such as BOP, CACFP, CI, CSFP, DA, EMPP, FDNR, NAI, NSP, and NSLP.

Program	Short Descript.
BOP	Bureaus of Prisons
CACFP	Child and Adult Care Food Program
CI	Charitable Institutions
CSFP	Commodity Supplemental Food Program
DA	Disaster Assistance
EMPP	Elderly Nutrition Pilot Program
FDNR	Feed Distribution Program on Indian Reser...
NAI	National Avian Influenza Program
NSP	Nutrition Services Incentive Program
NSLP	National School Lunch Program

If you do not know the exact value, another option is to perform a **matchcode search**. By clicking on the matchcode button next to the field, possible values for the field will display. For example, in the diagram above we clicked in the matchcode box next to the Program field. A pop-up display lists possible programs and here, you would most likely want to select NSLP, and click "OK".

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Order Management

WBSM Selection Options

Multiple Selection

Option	From	To
◇		
◇		
◇		
◇		
◇		

Row 1 of 5

OK Cancel

Clicking the grey diamonds will display the Selection Options pop up (shown on right)

Selection Options

Select Exclude from Selection

- Single Value
- Greater than or Equal to
- Less than or Equal to
- Greater than
- Less than
- Unequal to
- Interval
- Outside Range

Remove Operator

Clicking on the grey diamond allows you to narrow search criteria by choosing various operands like greater than, less than, unequal to, etc.

If you do not know an exact value of a field, but you know that the field should be greater than or equal to a particular value, less than or equal to, greater than, less than, unequal to, within an interval, or outside a particular range, you may click the grey diamond next to the field.

The grey diamond buttons display the **Selection Options** pop-up window. This allows you to use various operands like greater than, less than, unequal to, etc. Choose the desired operand, then continue entering criteria in the fields.

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Order Management

WBSM Multiple Selections

Reports : Input Criteria

Order Status Report

Program: [Dropdown] [Yellow Arrow]

Req. Delivery Date: [From] [To] [Yellow Arrow]

Material: [From] [To] [Yellow Arrow]

Ship-To Party: [Dropdown] [Yellow Arrow]

Region Code: [From] [To] [Yellow Arrow]

Purchasing Group: [Dropdown] [Yellow Arrow]

Status: [Dropdown] [Yellow Arrow]

Order Type: [Dropdown] [Yellow Arrow]

Order Number: [From] [To] [Yellow Arrow]

Incl. Re-Order/Re-Order Doc? [YES] [Yellow Arrow]

Shipment Receipt Date: [From] [To] [Yellow Arrow]

Multiple Selection

Option	From	To
[Dropdown]		
[Dropdown]		
[Dropdown]		

Show 1 of 5

OK Cancel

- The Multiple Options pop-up windows provide additional ways for narrowing selection criteria
- Click on a yellow arrow to enter additional criteria

Click the yellow arrows to perform an advanced search

The yellow arrow buttons let you perform an advanced search. Clicking on a yellow arrow button will display the **Multiple Selections** pop-up window. This tool allows you to use multiple selection criteria. For example, if you were filtering the Program field, wanted to see all except for NSLP and CACFP use the Option Unequal to function on the first line with NSLP and the same with CACFP on the second line, so that the results do not include NSLP and CACFP entries.

EXT300-SDA

Order

Manag

The screenshot shows a web application interface with a blue header bar containing the WBSM logo and the text "Report Displayed". Below the header is a data table with columns: Order Value, Program, Entitlement Indicate, Ship-To Party, Ship-To Name, Ship-To City, Ship-To State, Sales Order #, and Ship-To. A red box highlights a "Settings" button in the top right corner of the table area. A callout box points to this button with the following text:

Click on Settings to:

- Modify column selection
- Sort
- Calculate
- Filter
- Display

Order Value	Program	Entitlement Indicate	Ship-To Party	Ship-To Name	Ship-To City	Ship-To State	Sales Order #	Ship-To
89,390.72	NSLP	ENTITLE-SY13	5001716	KB PIZZA	FRANKLIN	PA	5000001188	10/20/13
89,390.72	NSLP	ENTITLE-SY13	5001716	KB PIZZA	FRANKLIN	PA	5000001196	10/20/13
89,390.72	NSLP	ENTITLE-SY13	5001716	KB PIZZA	FRANKLIN	PA	5000001199	10/20/13
11,846.25	NSLP	ENTITLE-SY13	5001716	KB PIZZA	FRANKLIN	PA	5000001199	10/20/13
11,846.25	NSLP	ENTITLE-SY13	5001716	KB PIZZA	FRANKLIN	PA	5000001199	10/20/13
11,846.25	NSLP	ENTITLE-SY13	5001716	KB PIZZA	FRANKLIN	PA	5000001199	10/20/13
10,021.50	NSLP	ENTITLE-SY13	5001716	KB PIZZA	FRANKLIN	PA	5000001193	10/20/13
10,021.50	NSLP	ENTITLE-SY13	5001716	KB PIZZA	FRANKLIN	PA	5000001196	10/20/13
10,021.50	NSLP	ENTITLE-SY13	5001716	KB PIZZA	FRANKLIN	PA	5000001201	10/20/13
89,390.72	NSLP	ENTITLE-SY13	5001716	KB PIZZA	FRANKLIN	PA	5000001180	10/20/13
89,390.72	NSLP	ENTITLE-SY13	5001716	KB PIZZA	FRANKLIN	PA	5000001181	10/20/13
89,390.72	NSLP	ENTITLE-SY13	5001716	KB PIZZA	FRANKLIN	PA	5000001185	10/20/13
11,846.25	NSLP	ENTITLE-SY13	5001716	KB PIZZA	FRANKLIN	PA	5000001178	10/20/13
11,846.25	NSLP	ENTITLE-SY13	5001716	KB PIZZA	FRANKLIN	PA	5000001182	10/20/13
11,846.25	NSLP	ENTITLE-SY13	5001716	KB PIZZA	FRANKLIN	PA	5000001186	10/20/13
10,021.50	NSLP	ENTITLE-SY13	5001716	KB PIZZA	FRANKLIN	PA	5000001183	10/20/13
10,021.50	NSLP	ENTITLE-SY13	5001716	KB PIZZA	FRANKLIN	PA	5000001184	10/20/13
10,021.50	NSLP	ENTITLE-SY13	5001716	KB PIZZA	FRANKLIN	PA	5000001187	10/20/13

After entering search criteria (whether entering values directly into the fields, doing a wildcard or matchcode search, and/or using the selection options and multiple selections pop-ups), your customized report will display.

On the top right-hand side of the screen, click on Settings to: Modify column selection, sort results, do calculations, create a filter, and/or change the display.

EXT300-SDA

Order Management

WBSM Modify Column Selection

Proc Hierarchy	Ent#/Bus#/Indct#	Allocation # / Corr	Part Desc	Requested Qty	Sales Unit	Cost / LB	Net Order Value	Requested Dtl
E BULK-	VEGETABLESTOMATOESGANNED	ENTITLE-S113	DOMESTIC STATISTICAL 1000	10,000	CS	0.41	11,846.25	01/06/2013
LUPS UNFZ PROCESSOR PACK	CHEESEMOZZARELLA/BULK	ENTITLE-S113	DOMESTIC STATISTICAL 1000	40,320,000	LB	1.72	69,360.72	01/06/2013
LUPS UNFZ PROCESSOR PACK	CHEESEMOZZARELLA/BULK	ENTITLE-S113	DOMESTIC STATISTICAL 1000	40,320,000	LB	1.72	69,360.72	05/06/2013
E BULK-	VEGETABLESTOMATOESGANNED	ENTITLE-S113	DOMESTIC STATISTICAL 1000	10,000	CS	0.41	11,846.25	03/06/2013
HARD WHT BRD UNBL-BULK	FLOUR/BAKER/BULK	ENTITLE-S113	DOMESTIC STATISTICAL 1000	45,000,000	LB	0.22	10,021.50	01/06/2013
HARD WHT BRD UNBL-BULK	FLOUR/BAKER/BULK	ENTITLE-S113	DOMESTIC STATISTICAL 1000	45,000,000	LB	0.22	10,021.50	01/06/2013
LUPS UNFZ PROCESSOR PACK	CHEESEMOZZARELLA/BULK	ENTITLE-S113	DOMESTIC STATISTICAL 1000	40,320,000	LB	1.72	69,360.72	01/06/2013
E BULK-	VEGETABLESTOMATOESGANNED	ENTITLE-S113	DOMESTIC STATISTICAL 1000	10,000	CS	0.41	11,846.25	01/06/2013
HARD WHT BRD UNBL-BULK	FLOUR/BAKER/BULK	ENTITLE-S113	DOMESTIC STATISTICAL 1000	45,000,000	LB	0.22	10,021.50	01/06/2013

Settings

View: [Standard View] Save Save as... Print Properties

Column Selection Calculation Filter Display

Hidden Columns: Higher Item # Bolt, SO Item Category, ZDOM Order #, ZDOM Order Item #, ECOS # / Reference #, Created on, Created by

Displayed Columns: Order Type, Sales Order #, SO Item #, Program, Sold-To Party, Sold-To Name, Sold-To State

OK Cancel Apply

Order Type	Sales Order #	SO Item #	Status Text	Program	Sold-To Party	Sold-To Name	Sold-To State
V			Purchased				
ZDOM	5000005178	100	Purchased	NSLP	4000116	CA Fort Mojave	CA
ZDOM	5000005180	100	Purchased	NSLP	4000116	CA Fort Mojave	CA
ZDOM	5000005181	100	Purchased	NSLP	4000116	CA Fort Mojave	CA

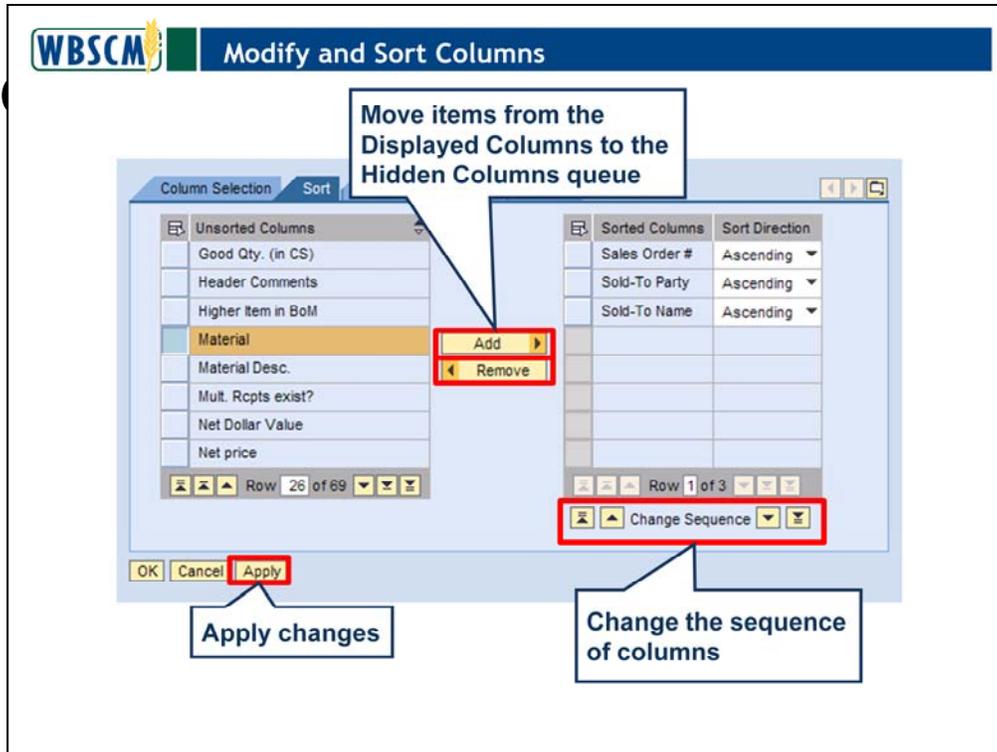
Click on Settings to further customize columns.

Click on the Column Selection tab to further customize columns.

Clicking the **Settings** button displays the **Settings** area above the report. You can add and/or remove columns from the report from the **Column Selection** tab.

EXT300-SDA

Order Manage



To remove a column from the report, select it in the **Displayed Columns** table and click the **Remove** button.

To add a column to the report, select it in the **Hidden Columns** table and click the **Add** button.

Changing the order of the columns is done using the **Change Sequence** buttons below the **Displayed Columns** table. Simply select the column you wish to move incrementally and click the up and down arrows until the column is in the desired position. Please note that the arrows with horizontal lines above and below the arrow points will move the selected column to the beginning and end of the report respectively.

Sorting the results displayed in the columns is done by clicking the **Sort** tab and selecting the desired ascending/descending sort in the **Sort Direction** column.

Click the **Apply** button to make and view the changes.

EXT300-SDA

Order Management

The screenshot shows the WBSM Calculation dialog box. The 'Calculation' tab is selected, showing a list of columns and their corresponding calculation types. The 'Apply' button is highlighted. Callouts provide instructions on how to use the dialog box.

Click on the Calculation tab to calculate Total, Minimum, Maximum, and Mean Values

Only the columns that can be analyzed with calculations will be displayed.

Click the Apply button to run the calculation and display the result in the table

Select your display preferences

To calculate the Total, Minimum, Maximum, and Mean Values, click the Calculation tab.

Only the columns that can be analyzed with calculations will be displayed in the **Calculation** tab. In this instance, these columns are Qty. Requested, Net Dollar Value, Qty. Delivered, Good Qty., Over Qty., Damage Qty. and Rejected Qty.

If the "Display Calculations at the Start of Table" checkbox is unchecked, the results will display at the bottom of the table.

If the "Collapse to Intermediate Results" checkbox is selected, only the top-level of intermediate results is displayed.

If a column has been sorted and the user does not want it to be calculated, uncheck the "Display Intermediate Results for Sorted Columns" checkbox. If the user has multiple sorted columns and wants some of their results displayed and some not displayed, click the **Exception** button to choose which columns to show the results.

The results of your calculations will appear in the inserted yellow rows in the table once the **Apply** button is clicked.

EXT300-SDA

Order Management

WBSCM Sorting Columns in a Report

Use the up and down arrows to sort results

Order Status Report

View: ORDER_STATUS | Export

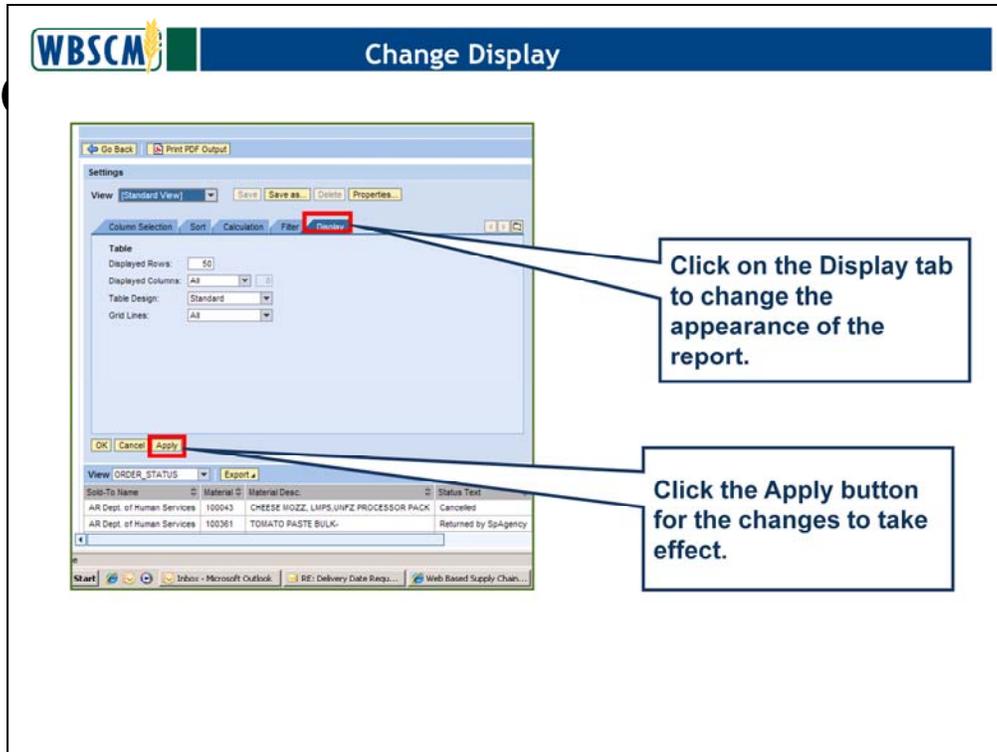
Ship-To Name	Material	Material Desc	Status Text	Requested Del. Date	Requested Qty	Sales Unit	Cost / LB	Net Dollar Value	Program	Entitlement Indicato	Ship-To Party	Ship-To Name
AR Dept. of Human Services	100043	CHEESE MOZZ. LMP5 UNFZ PROCESSOR PACK	Cancelled	01/00/2013	40,320,000	LB	1.72	69,390.72	NSLP	ENTITLE-SY13	5001716	KB PIZZA
AR Dept. of Human Services	100361	TOMATO PASTE BULK	Returned by SpAgency		10,000	CS	0.41	11,846.25	NSLP	ENTITLE-SY13	5001716	KB PIZZA
AR Dept. of Human Services	100482	FLOUR, BAKER HARD WHT BRD UNBL-BULK	Approved by SCA		45,000,000	LB	0.22	10,021.50	NSLP	ENTITLE-SY13	5001716	KB PIZZA
CA Fort Mojave	100043	CHEESE MOZZ. LMP5 UNFZ PROCESSOR PACK	Purchased		40,320,000	LB	1.72	69,390.72	NSLP	ENTITLE-SY13	5001716	KB PIZZA
CA Fort Mojave	100361	TOMATO PASTE BULK	Purchased		10,000	CS	0.41	11,846.25	NSLP	ENTITLE-SY13	5001716	KB PIZZA
CA Fort Mojave	100482	FLOUR, BAKER HARD WHT BRD UNBL-BULK	Purchased		45,000,000	LB	0.22	10,021.50	NSLP	ENTITLE-SY13	5001716	KB PIZZA
AR Dept. of Human Services	100043	CHEESE MOZZ. LMP5 UNFZ PROCESSOR PACK	Returned by SpAgency	03/00/2013	40,320,000	LB	1.72	69,390.72	NSLP	ENTITLE-SY13	5001716	KB PIZZA

- Sorting columns in ascending or descending order allows users to organize their results
- Click on the up arrow for the respective column to sort results in ascending order
- Click on the down arrow for the respective column to sort results in descending order

Another way that users can organize report results is to sort the columns. Users may sort columns in ascending or descending order simply by clicking on the arrow button next to the column title. This will display results in a chronological or alphabetical order.

EXT300-SDA

Order Management



Okay, we have shown you the easy way to filter. Now back to **Settings** and the **Display** tab. Using the **Display** tab, you can change the appearance of your report. You can change the number of columns and rows displayed, the aesthetic design of the table, and the grid lines.

Once you have made your selections, click the **Apply** button for the changes to take effect.

EXT300-SDA

Order Management

The screenshot shows the WBSM 'Print' interface. At the top left is the WBSM logo. The title bar says 'Print'. Below the title bar is a toolbar with 'Go Back' and 'Print PDF Output' buttons. The 'Print PDF Output' button is highlighted with a red box and a callout box that says 'Click the Print PDF Output button to print the report.' Below the toolbar is a 'Settings' section with a 'View' dropdown set to 'Standard View', and buttons for 'Save', 'Save as...', 'Delete', and 'Properties...'. Below the settings is a 'Table' section with 'Column Selection', 'Sort', 'Calculation', 'Filter', and 'Display' tabs. The 'Table' section has 'Displayed Rows' set to 50, 'Displayed Columns' set to 'All', 'Table Design' set to 'Standard', and 'Grid Lines' set to 'All'. Below the table is a 'View: ORDER STATUS' dropdown and an 'Export' button, which is also highlighted with a red box and a callout box that says 'Click the Export button to export the report to Excel where you may further customize the report and/or print from that application.' Below the 'Export' button is a table with columns 'Sold-To Name', 'Material', 'Material Desc.', and 'Status Text'. The table contains two rows of data.

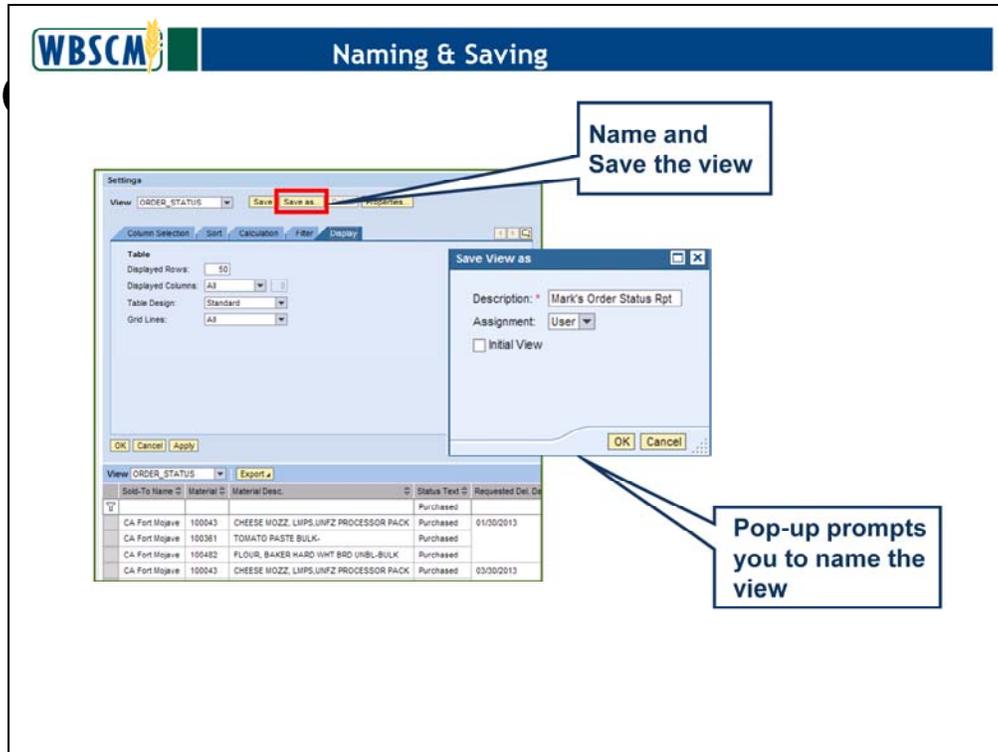
Sold-To Name	Material	Material Desc.	Status Text
AR Dept. of Human Services	100043	CHEESE HOZZ, LMPS UNFZ PROCESSOR PACK	Cancelled
AR Dept. of Human Services	100361	TOMATO PASTE BULK.	Returned by SpAgency

To print the report click the **Print PDF Output** button. The report results are not customizable using this method and the report will be arranged by Sold To Party with the Sales Orders sorted underneath by Requested Delivery Date.

Of course, you can also export the report to Excel, customize it in any way that you like, and print from that application as well.

EXT300-SDA

Order Management



You may choose to save your view. By saving your view, you will be able to apply these report customizations anytime you run this report simply by choosing your saved view from the View dropdown box.

To save your view, click the **Save As** button. The **Save As** pop-up window will display. Enter a name for your view in the **Description** field. The view will be automatically assigned at the user level, so it will only be available to you when you are signed in under your username (others in your office and agency will not have access to view reports in your saved view).

Select the **Initial View** checkbox if you would like reports to automatically default to displaying in this view when you run them.

Click the **OK** button to save your view.

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The screenshot shows the 'Naming & Saving' interface for the 'Order Status Report'. The interface includes a navigation menu on the left with options like 'Multi-Food Received Shipment Report', 'Received Shipment Report', 'Requisition Status Report', 'Redistribution/Redonation Detail Report', 'Order Status Report', 'NW Delivery Calendar Report', and 'Stocks at Subcontractor'. The main content area displays a table of order data with columns for 'Order', 'Higher Item in Batch', 'SD Item Category', 'ZDOM Order #', 'ZDOM Order Item #', and 'ECOS # / Ret'. A dropdown menu is open, showing options like 'MATERIAL_OUTLAYS', 'Mark's Order Status Report', 'ORDER_STATUS', 'RCVD_SHIPMENT', and 'VALUE_OF_COMM_DOMESTIC'. A callout box points to the dropdown with the text 'Select your view'.

Order	Higher Item in Batch	SD Item Category	ZDOM Order #	ZDOM Order Item #	ECOS # / Ret
ZDOM		ZTDS			
ZDOM		ZTDS			
ZDOM		ZTDS			
ZDOM		ZTDS			
ZDOM	5000005197	ZTDS			
ZDOM	5000005200	ZTDS			
ZDOM	5000005193	ZTDS			
ZDOM	5000005198	ZTDS			
ZDOM	5000005201	ZTDS			
ZDOM	5000005180	ZTDS			
ZDOM	5000005181	ZTDS			
ZDOM	5000005185	ZTDS			
ZDOM	5000005178	ZTDS			
ZDOM	5000005182	ZTDS			
ZDOM	5000005186	ZTDS			
ZDOM	5000005183	ZTDS			
ZDOM	5000005184	ZTDS			
ZDOM	5000005187	ZTDS			

To display your customized view and automatically apply all settings that were part of your saved view the next time you run a report, select the saved view from the **View** dropdown box.

After running your report, you may wish to export or print it so you can view it outside of Web SCM.

Requisition Status & Order Reports Discussion



The Requisition Status and Order Status Reports that we have just demonstrated in WBSCM have a *very important field* to which you will want to pay close attention and that field name is in the name of both reports. That's right, we are talking about the **Status** field. You will want to run Requisition Status Reports and Order Status Reports FREQUENTLY for your processing plants and/or warehouses to see what is scheduled to come into your plants and when and you will want to pay special attention to the order status codes as orders are entered, created, approved, sent out for bids and purchased. State Agencies should coordinate deliveries with their processors, but as we have too often discovered, it does not always happen and the further the orders have gone through the process, the harder it becomes to change, divert and/or cancel them.



WBSCM Status Codes

- **Ready for Approval**
- **Approved by SDA**
- **Approved by SpAgency**
- **On Invitation**
- **Returned by AMS/FSA**
- **Resubmitted to AMS/FSA**

Ready for Approval means a recipient agency, co-op or State Distributing Agency has entered an order in WBSCM and that order is waiting for State Distributing Agency approval.

Approved by SDA means the State Distributing Agency has consolidated requisitions and created sales orders which are awaiting approval by the Food and Nutrition Service.

Approved by SpAgency means the sales orders have been approved by FNS and sent to the Agricultural Marketing Service or Farm Service Agency for purchase.

On Invitation means that the Agricultural Marketing Service or Farm Service Agency has run their worklists and placed the sales orders on a solicitation which is released for vendor bids.

Purchased means that the sales orders have been bid on and procured and placed on a signed contract by the Agricultural Marketing Service or Farm Service Agency. Sales Orders in Purchased status CANNOT be canceled and shipment CANNOT be delayed. Sales Orders in Purchased status may, however, be diverted to another destination via State-approved Contract Modification Requests.

Returned by AMS/FSA means that the sales orders have been returned by the Agricultural Marketing Service or Farm Service Agency. This happens during the Contract Modification Request process so that destinations can be changed. It may also happen because the sales orders are not purchased and need to be moved to another Requested Delivery Date or be canceled.

Resubmitted to AMS/FSA means that the sales orders have been resubmitted to the Agricultural Marketing Service or Farm Service Agency after having been returned for changes post FNS approval.

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WBSCM Navigation Tips

1. **Help:**
 - a. Help tab.
 - b. Context Sensitive Help: located under the Options Icon (far right hand corner of the screen to the right of back & forward)
 - c. F1 - gives you a description of the screen you are looking at
2. **Hourglass:**
 - a. If an hourglass doesn't change when you move your mouse around that means the last function is still processing
 - b. If the hourglass does change when you move the mouse around that means you can continue to navigate.
3. **Pop-Up Menu:** If a pop-up menu appears and a bottom menu disappears, click and drag the top bar of the box to move it up to see the menu again.
4. **Job Aids:**
 - a. Work Instructions
 - b. Quick Reference Steps

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WBSCM Navigation Tips

6. **Control Handles:** They expand or collapse certain areas within the portal such as the Detailed Navigation Menu
7. **Clicking the Back or Forward link:**
 - a. Use the back or forward link in WBSCM to access the previous or next screen.
 - b. Do not use the back arrow in Internet Explorer. That will end your WBSCM Session.
8. **Portal Favorites:** Select Options and Add to Portal Favorites.
9. **Wildcard Searches:** When searching for a particular material or name in WBSCM, you can use the asterisk (*) to search for part of the name or number. I.E. *beans will search for anything that ends with beans.

- Thank you for your time!!!



*Thank you
for your participation*