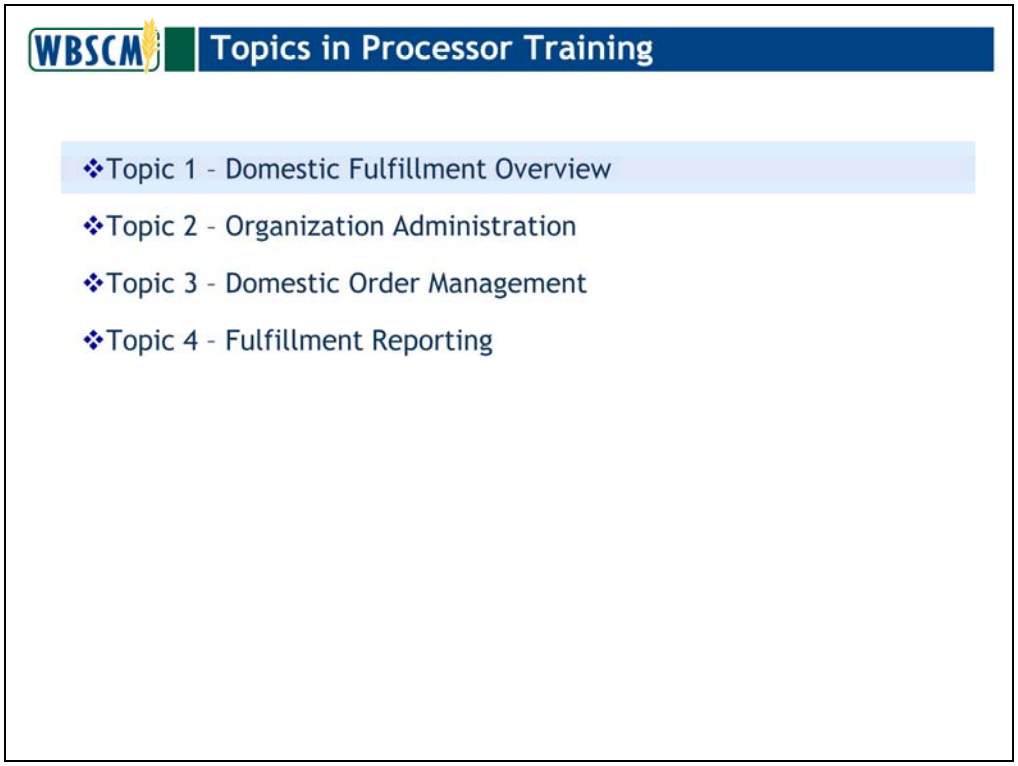
Welcome to our Processor Refresher Training for Web-Based Supply Chain Management or Web SCM.



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

WBSCM

REVIEW: WBSCM Key Terms

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.

WBSCM Objectives

- 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

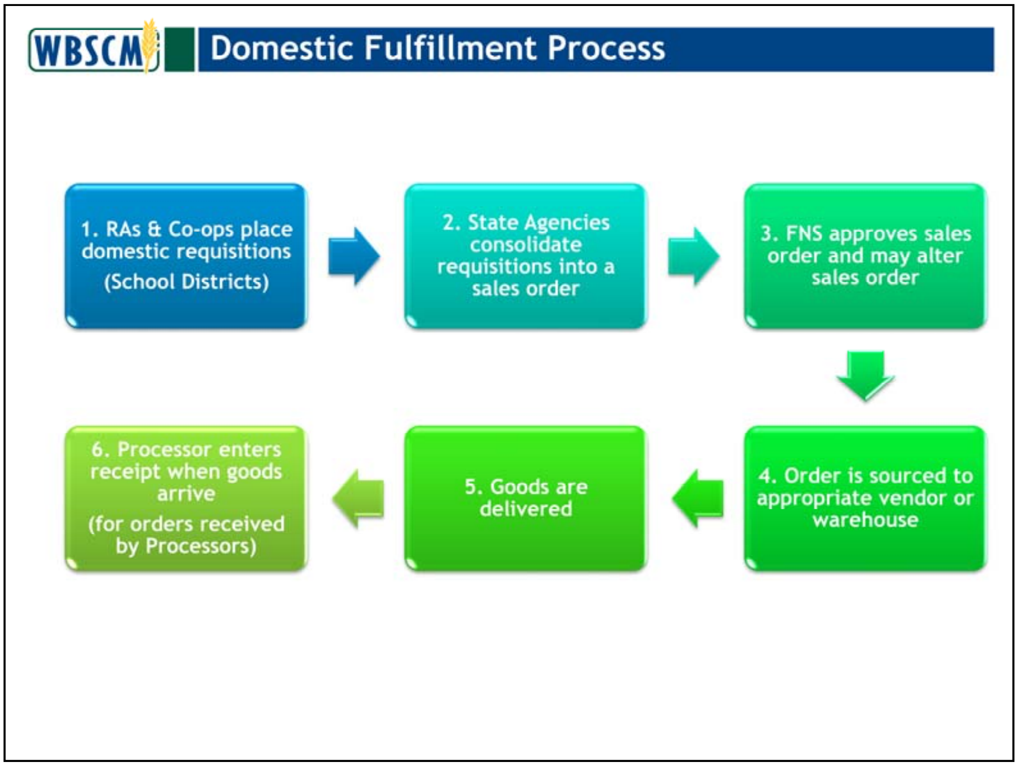
• Decrease administrative costs associated with procurement & contract management, and technology

• 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.



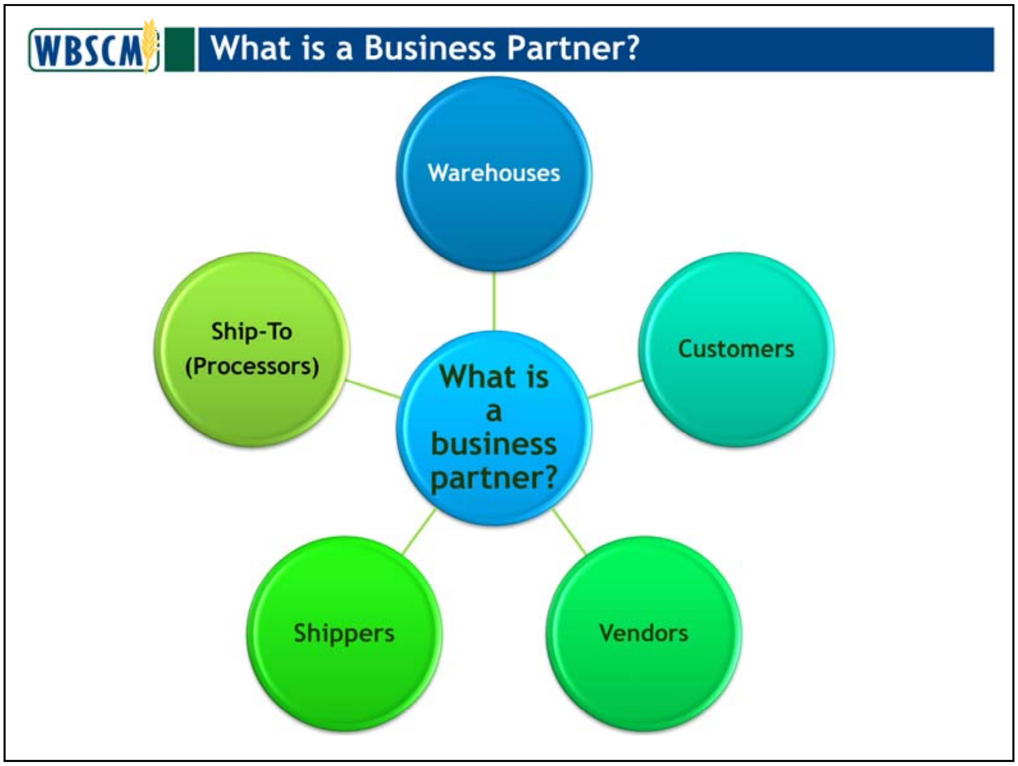
Domestic fulfillment begins when customers place domestic requisitions in Web SCM. It ends when the customer receives their order, and enters confirmation into Web SCM. Here is a high-level look at the domestic fulfillment process: (read box text)

Lessons in Organization Administration

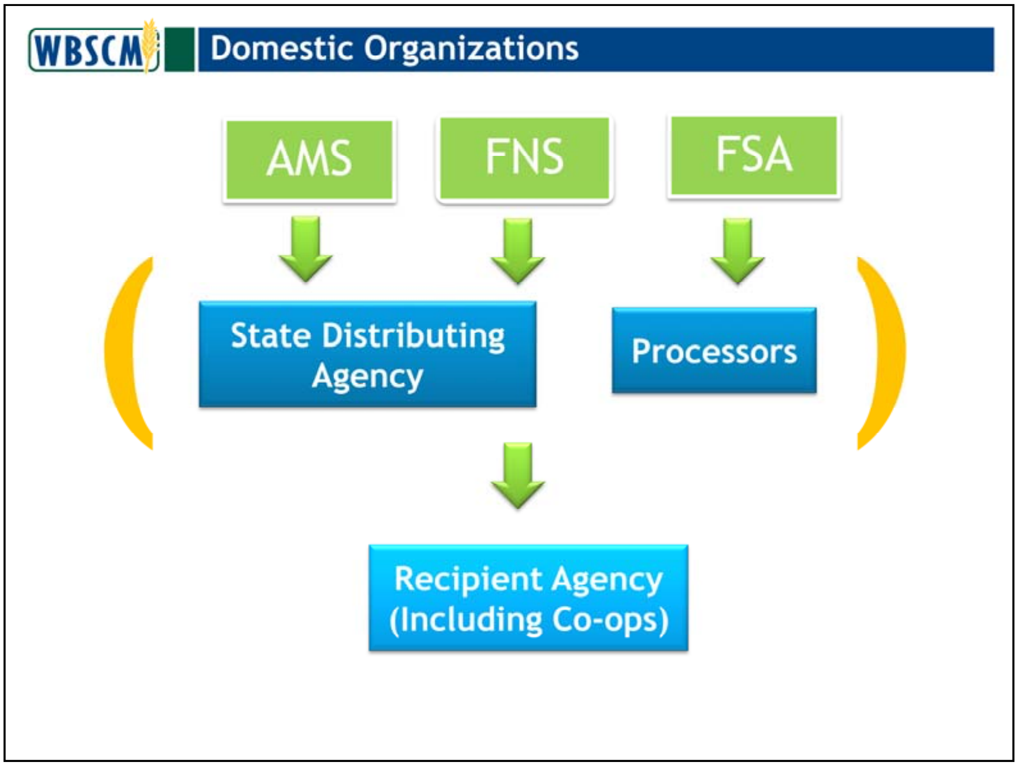
❖ **Topic 2 - Organization Administration**

- 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.

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.

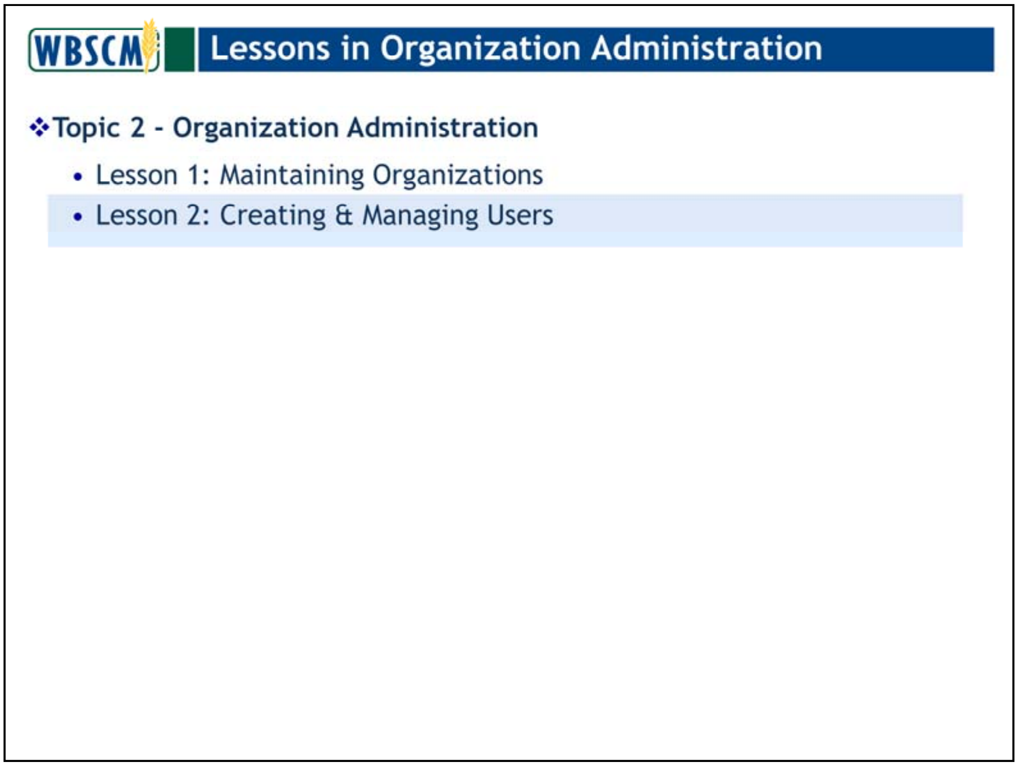
Each Organization has a sold-to and/or ship-to role assigned to it.

Sold-to Party:

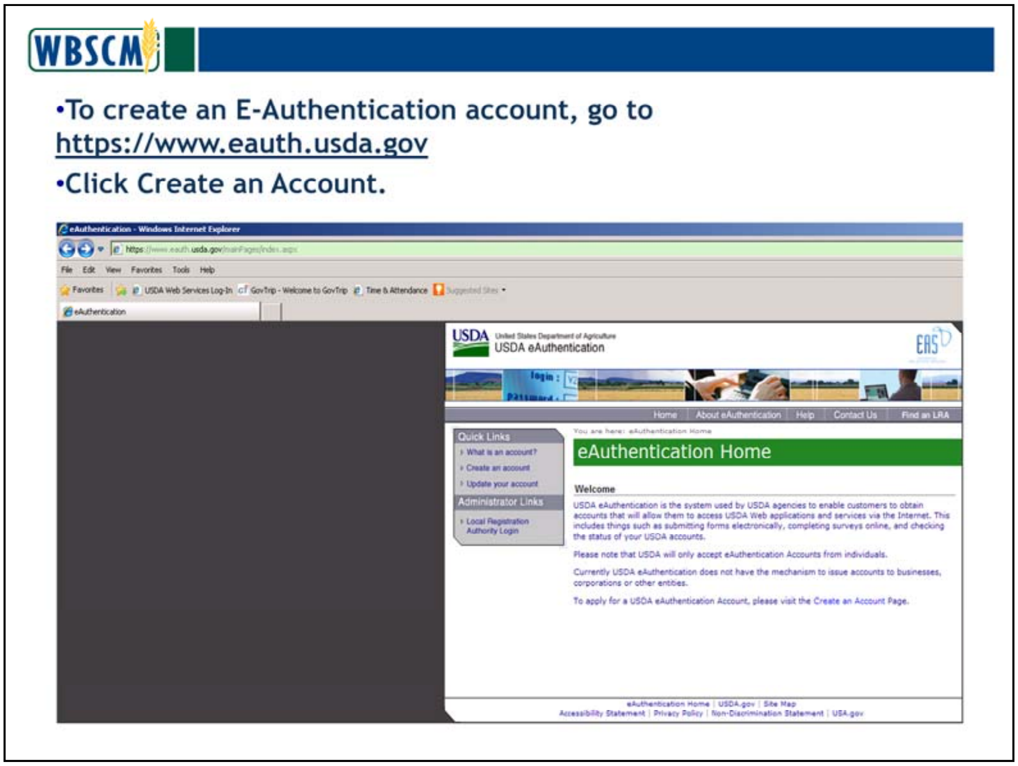
A Sold-to Party is an Organization that orders food. An Organization or State Agency may have multiple ship-to parties (including approved processors) that operate in their state.

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.

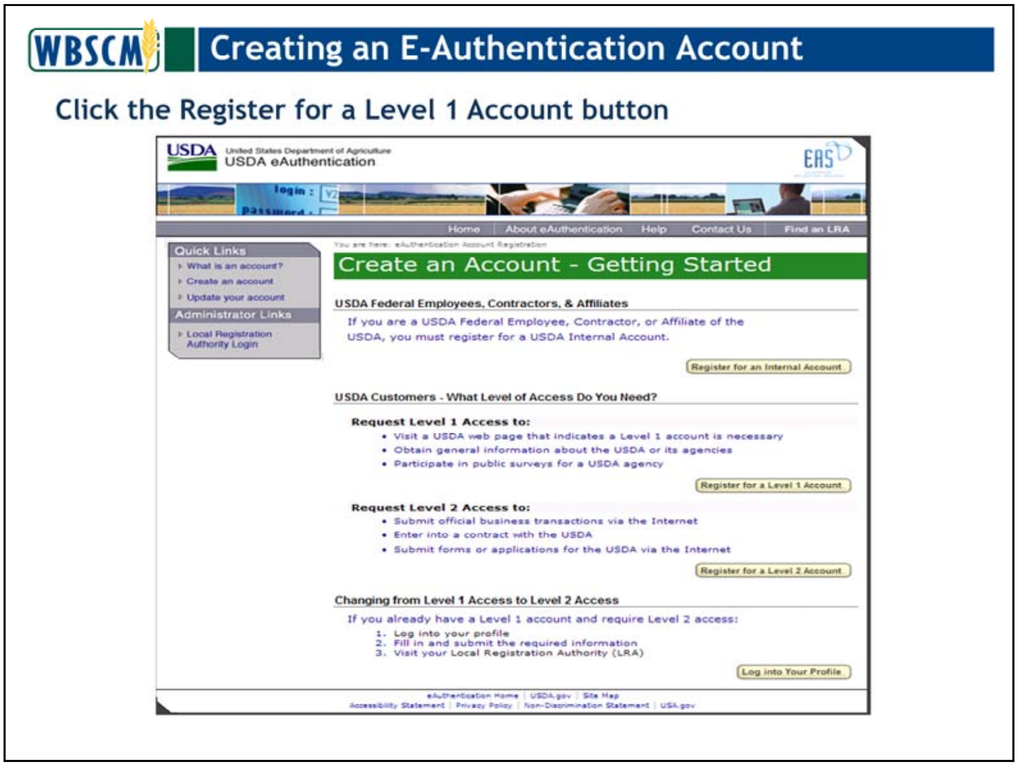


Okay, let’s move on to creating and managing users.



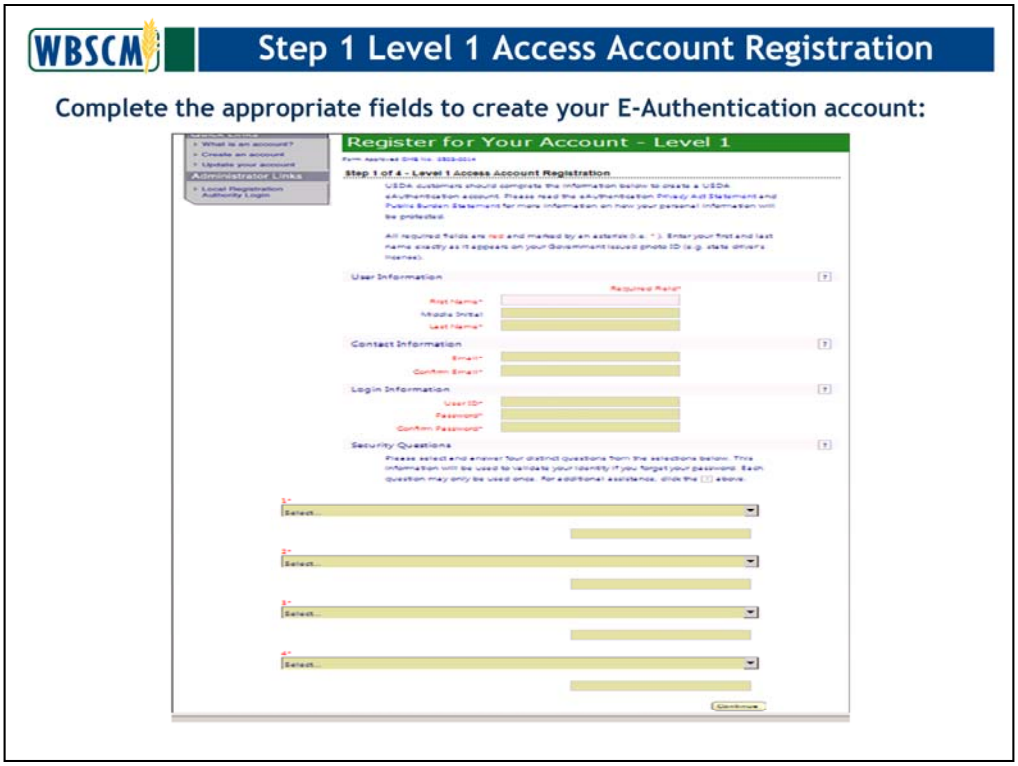
Before we can discuss creating and managing users, we need to go over how to become a new Web SCM user. Becoming a Web SCM user is a two-part process. To become a Web SCM user, the new user who does not already have an existing e-authentication account must create their own e-authentication account.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



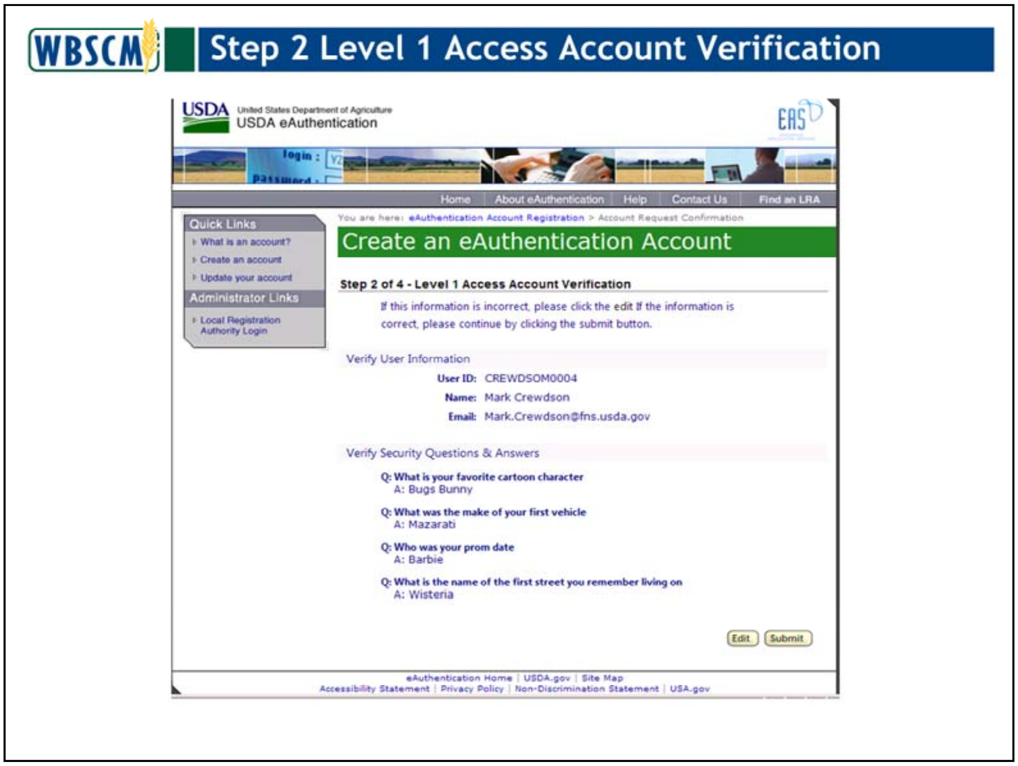
After clicking the link, you will be taken to the e-authentication account screen. There are two types of accounts that you can create.

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".



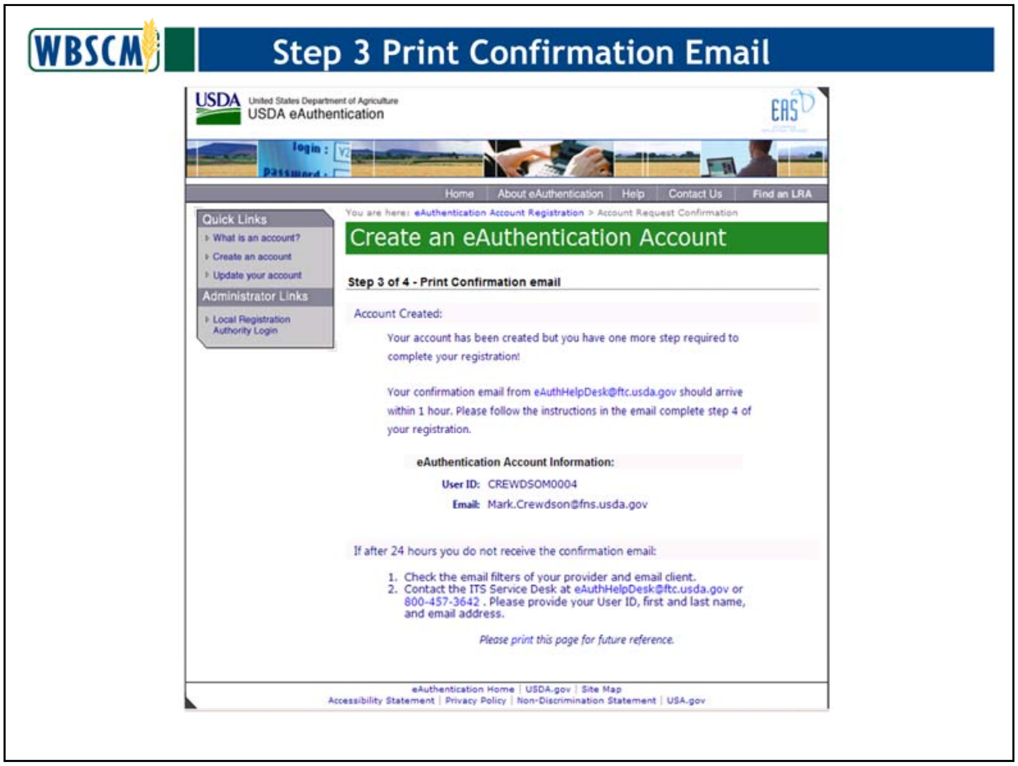
Then in the screen that displays, you will need to Enter all the required fields and click the continue button.

This is very similar to other website registration steps.

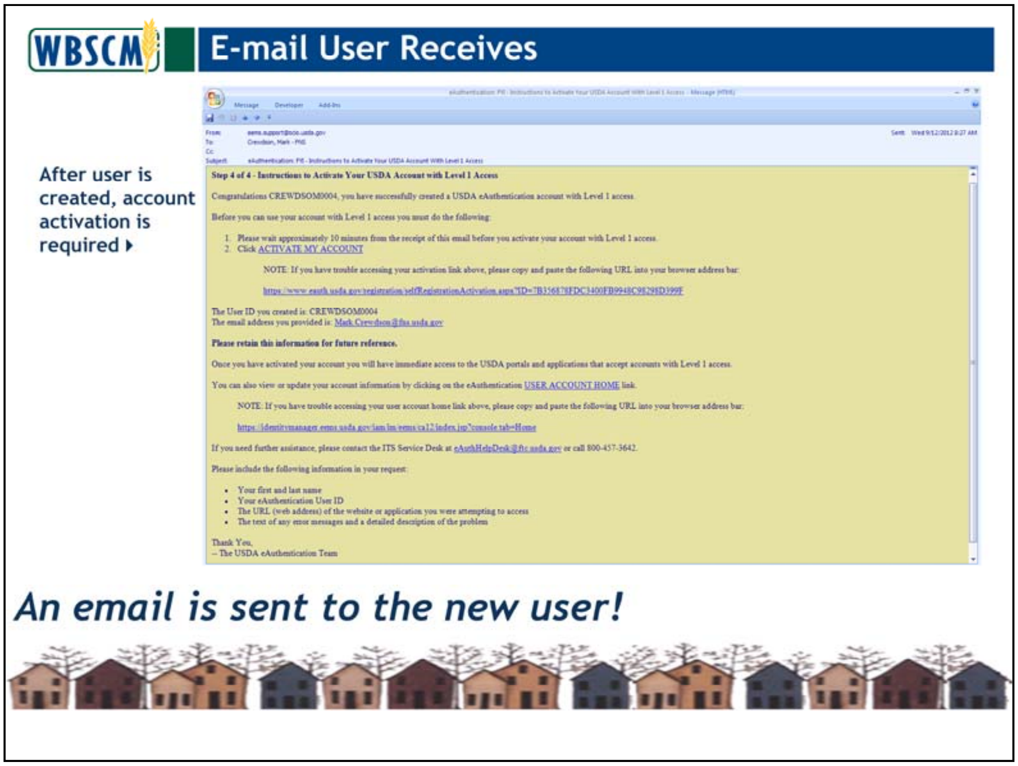


The information you entered will be displayed for confirmation. Once you have confirmed your information, click the **Submit** button. You have just created your new user account in E-Authentication.

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



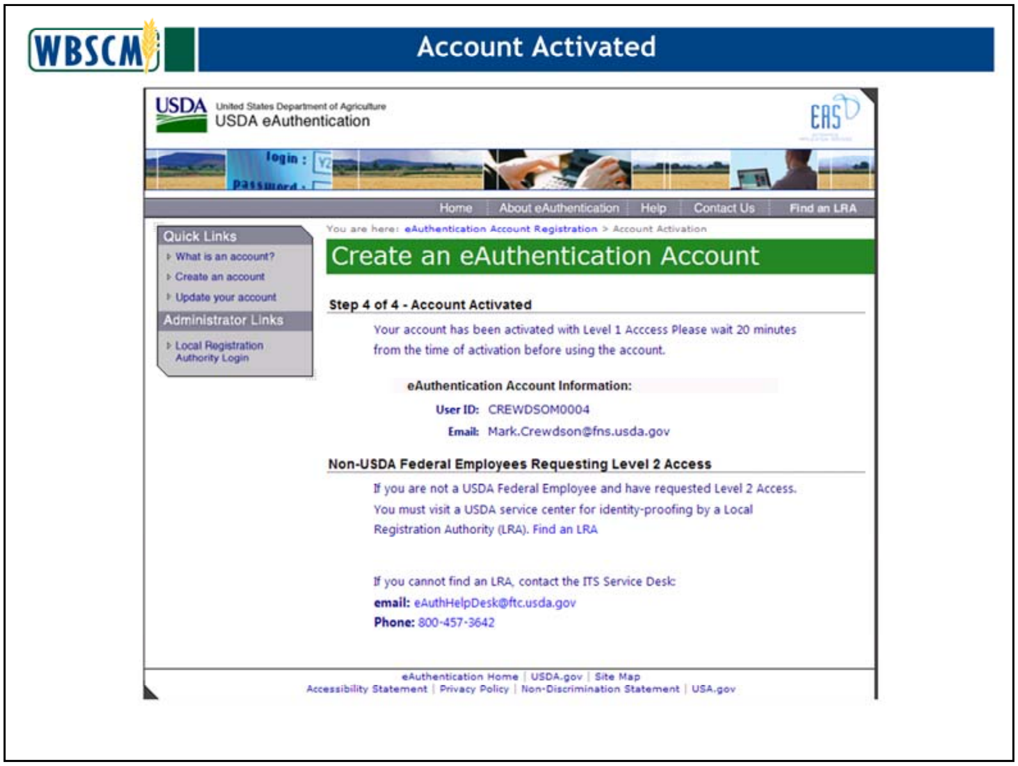
After clicking Submit, the Confirmation Email screen appears informing you that you will receive a confirmation email within one hour. You may want to print the email, or keep the electronic version of it handy when you receive it, as you will need to follow its instructions in order to complete the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



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.

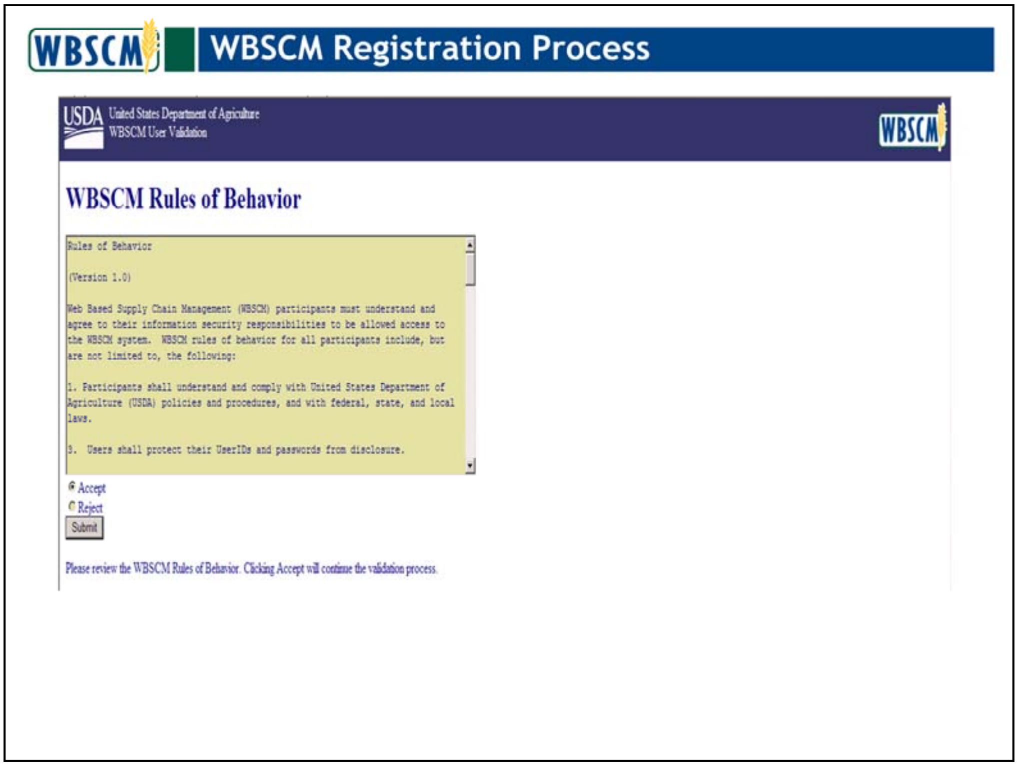
Please note that when we say the user is granted access to the appropriate systems, we mean that perhaps a vendor would only have access to external procurement applications in Web SCM, a customer would have access to order-placing applications, and a recall specialist would have access to recalls applications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

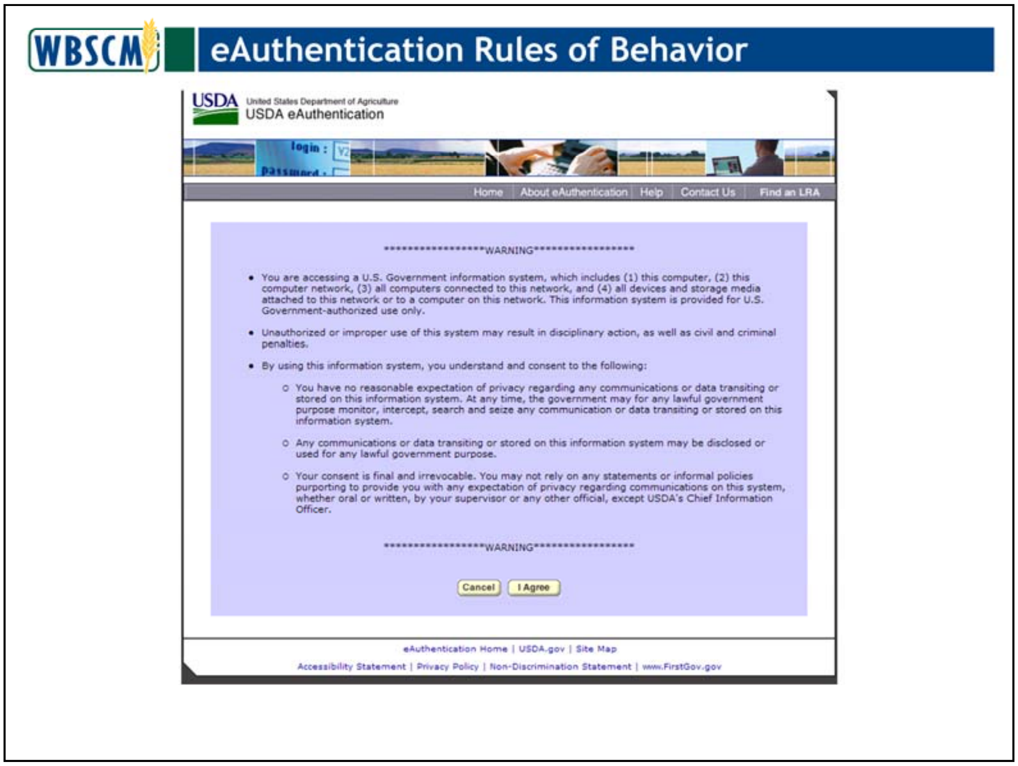


After clicking the ACTIVATE MY ACCOUNT link, the Account Activated screen appears letting you know that your e-authentication account has been activated and that you will be able to use the account in approximately 20 minutes.

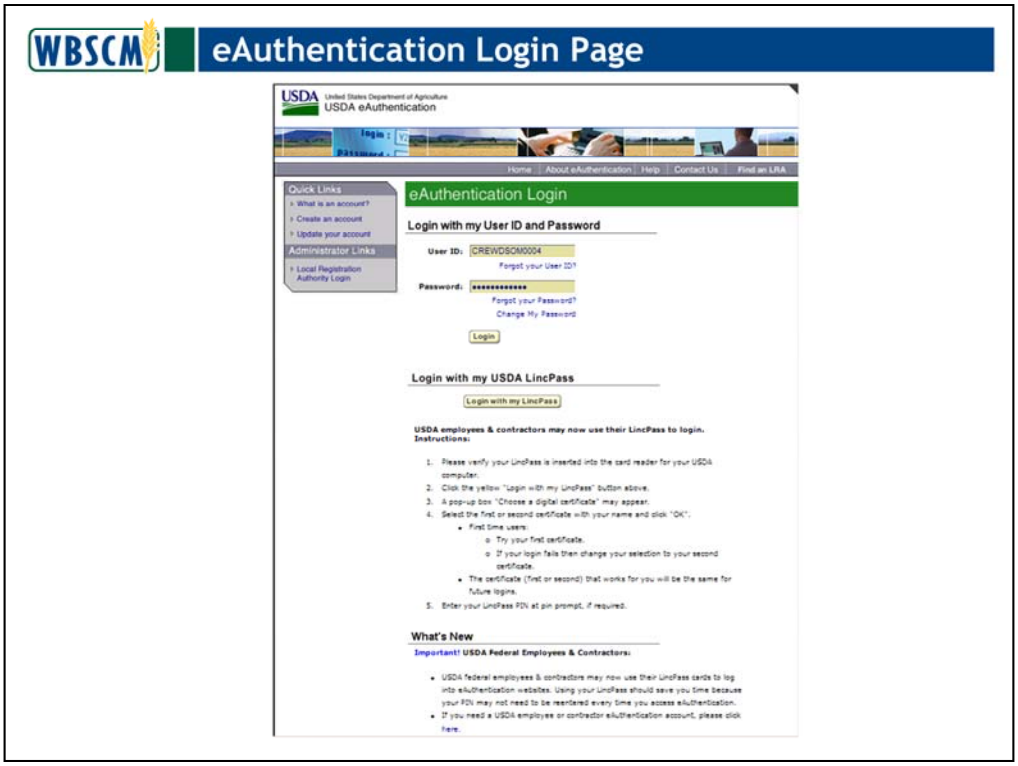
The link for the Web SCM Home Page is: www.usda.gov/wbscm. Once there, you may click on the Web SCM Login link in the top left corner in the "I want to . . ." links box.



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.



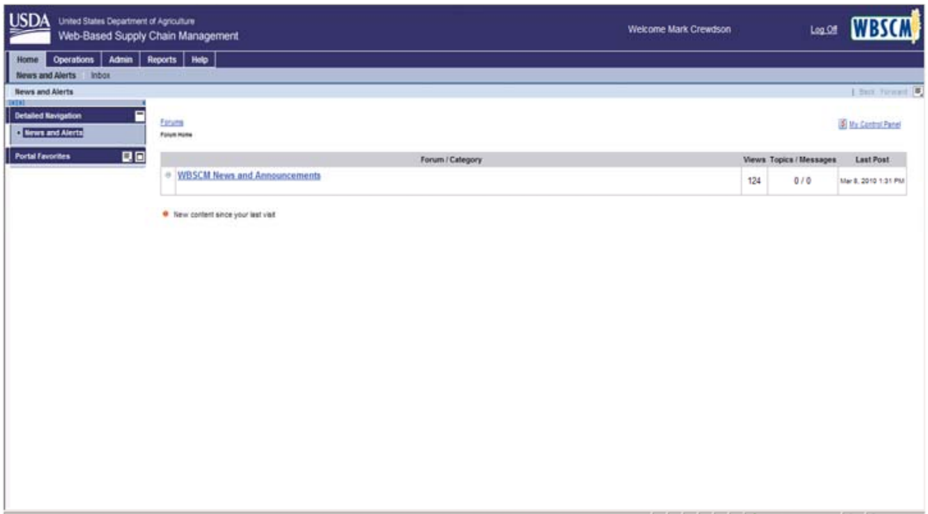
After clicking Submit, the Terms & Conditions display. This occurs every time you login to Web SCM. You will want to click the I Agree button to access the e-authentication login screen.



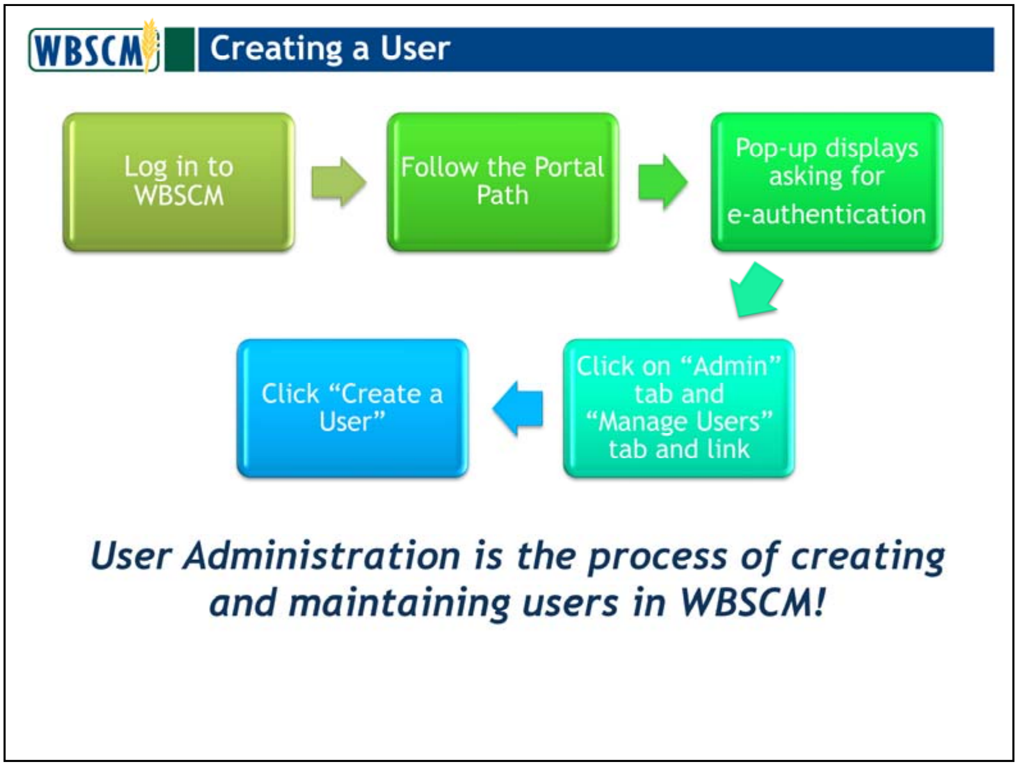
On the e-authentication login screen, enter your e-authentication User ID and Password, and click **Login**.

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.

WBSCM Home Page



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.

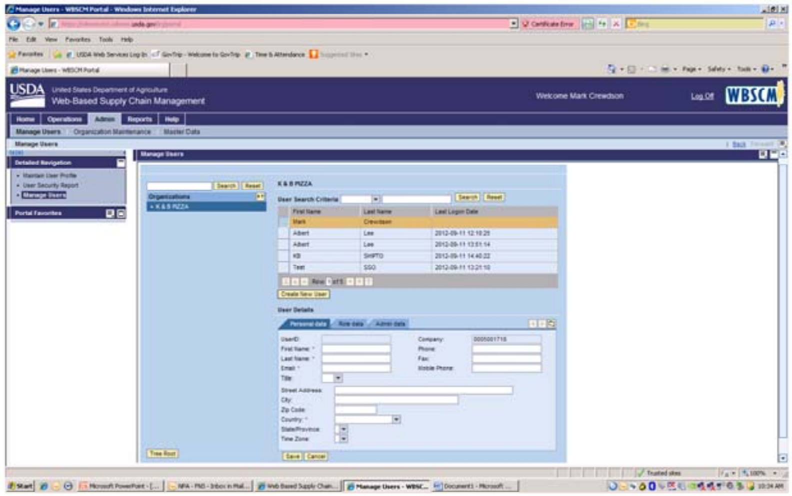


Now for the second part of the process. A user with an E-authentication account still cannot access Web SCM unless they are also made a user in Web SCM. User Administration is the process of creating and maintaining users in Web SCM. This includes Organization Administration users, User Administration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

Creating a User in WBSCM

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

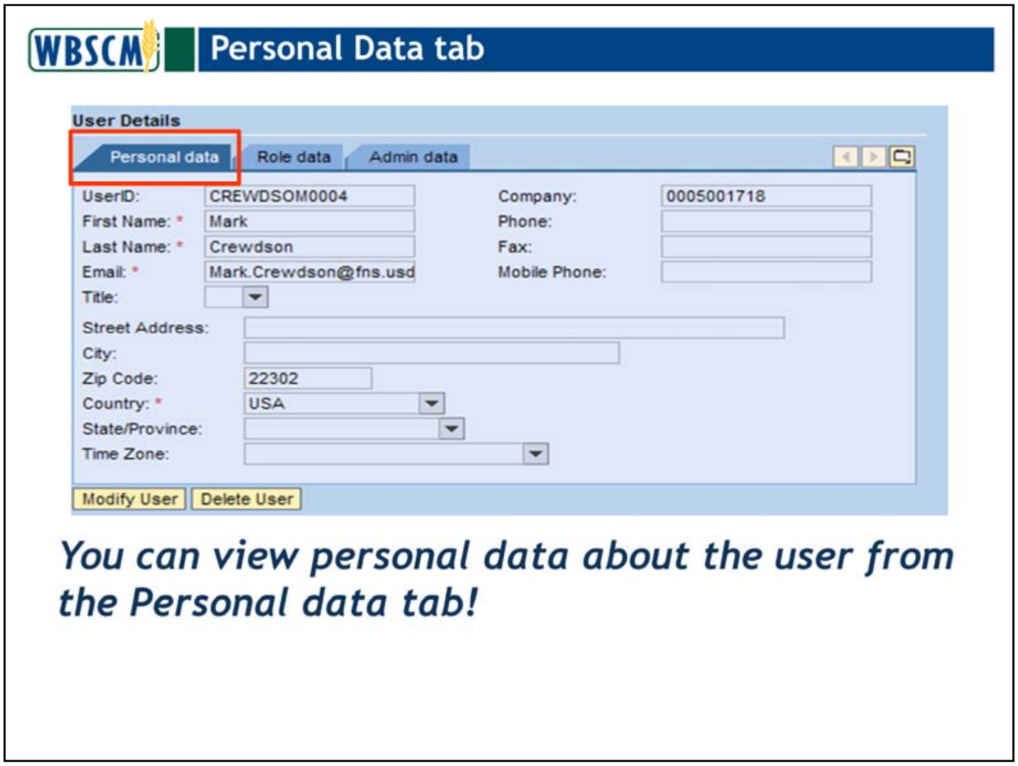


Once on the user creation screen, the Organization Administrator completes the user information required and clicks the Save button. All asterisked fields must be completed and also important to note, the User Last Name and Email address provided in the Personal data tab MUST match the E-authentication 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

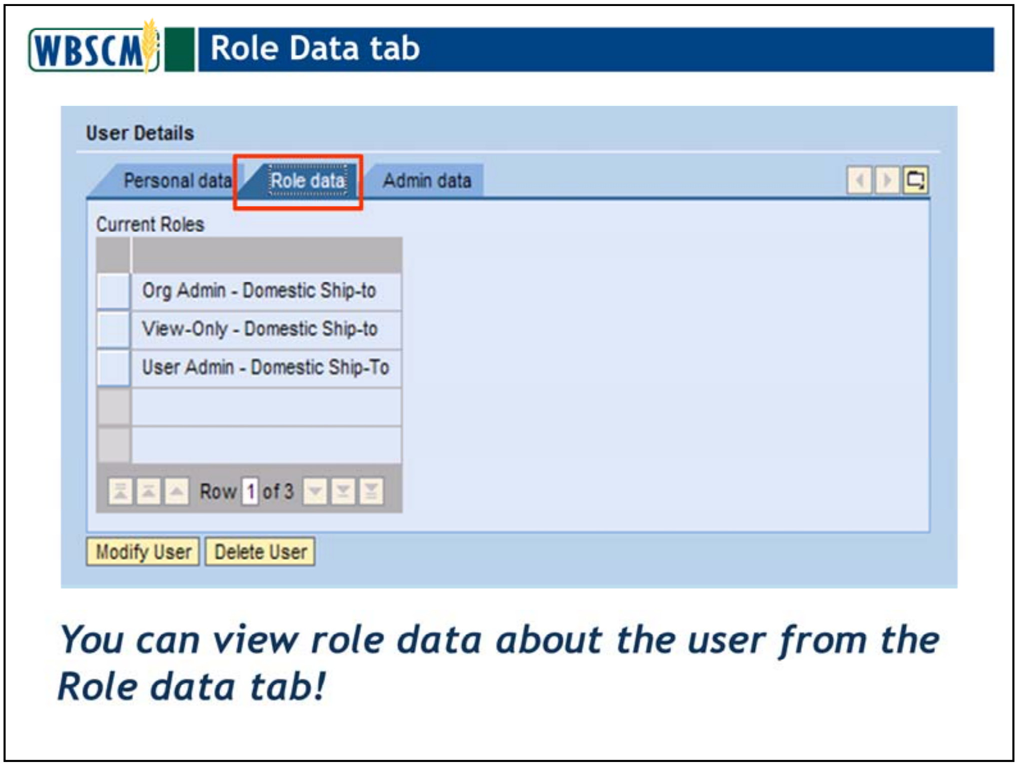
If you are assigned the Organization Administrator or User Administrator role, you will have the ability to create, display, and modify users and will be able to see all users within your organization. For example, if you are a Processor Organization Administrator, you will be able to see all users for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



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.

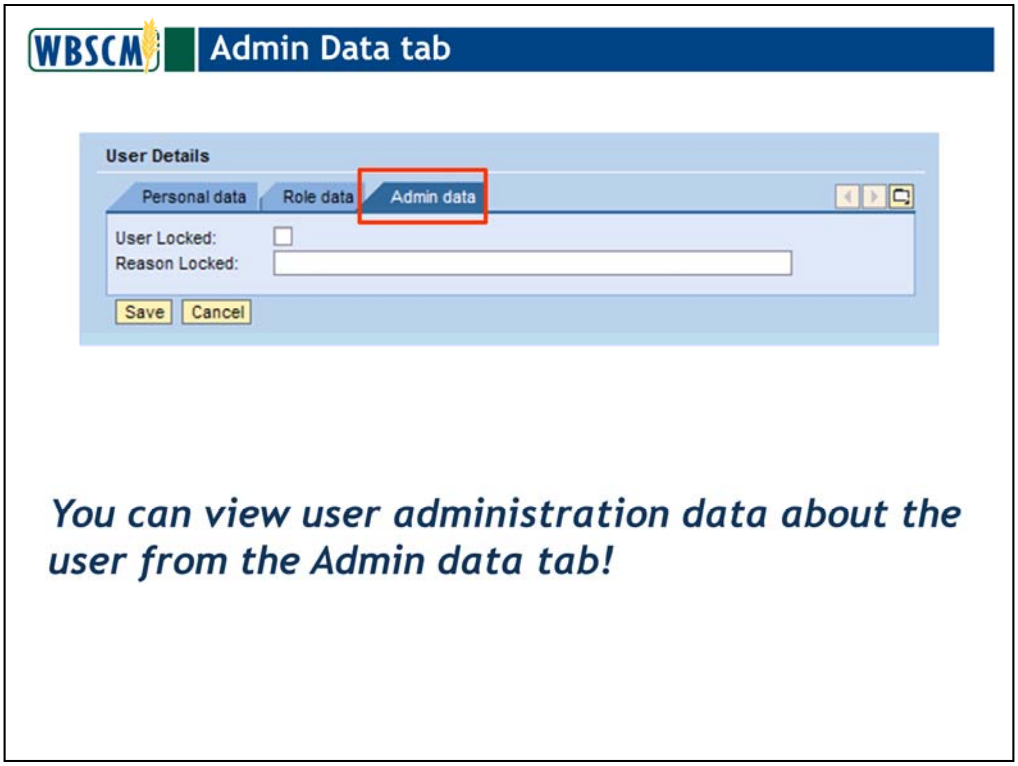


From the Role data tab, you can select the appropriate roles for the user. These roles correspond to security access that the user has, and determines what the user can do or see in Web SCM.

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.



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.

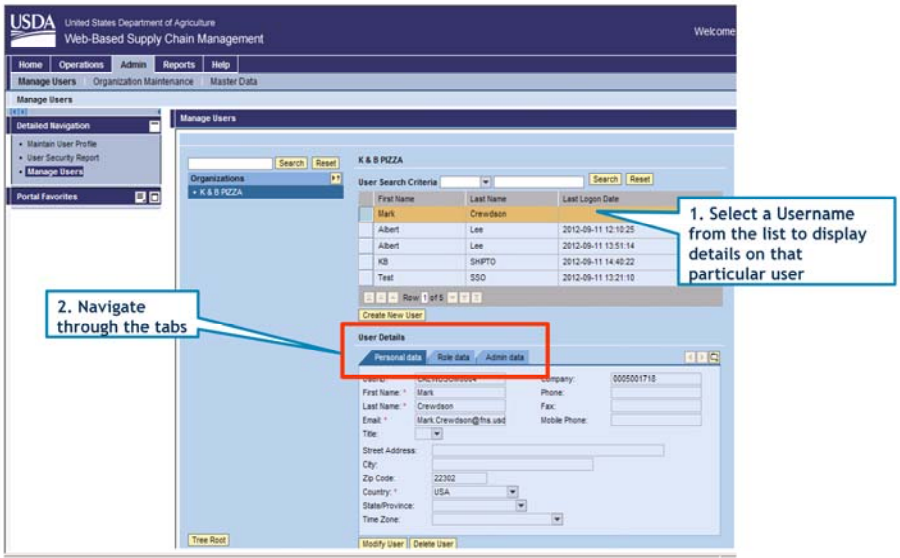
You might use this feature if an employee has changed roles in your company and no longer needs access, or if you find abuse.

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.

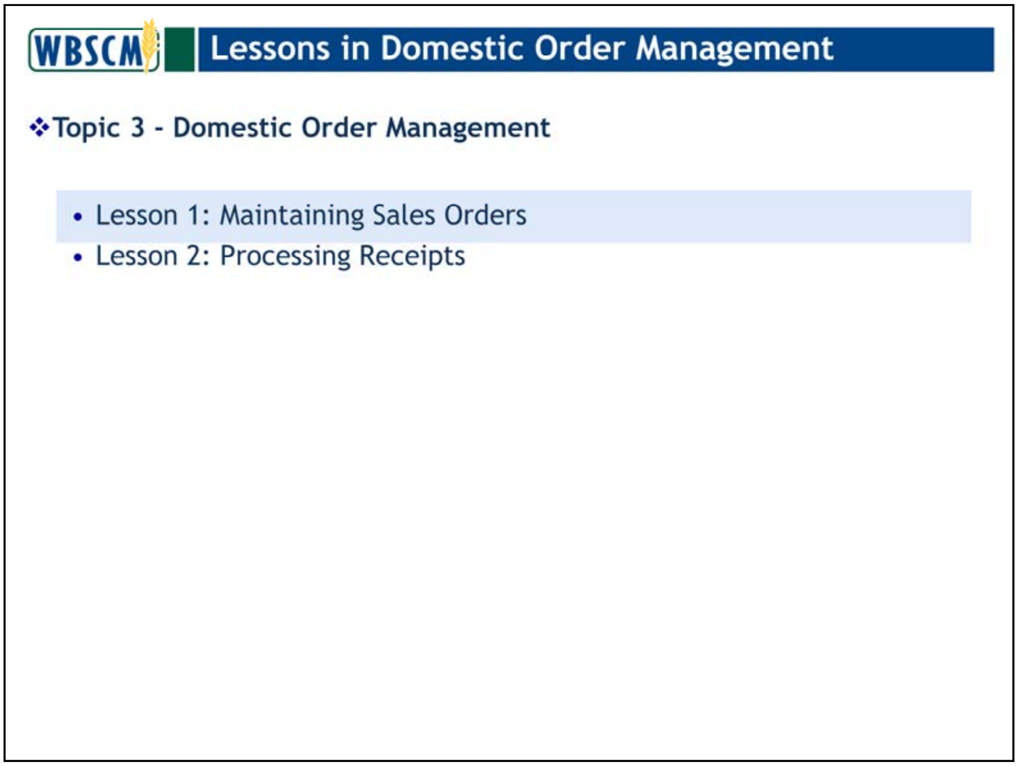
RBJ19

Displaying a User

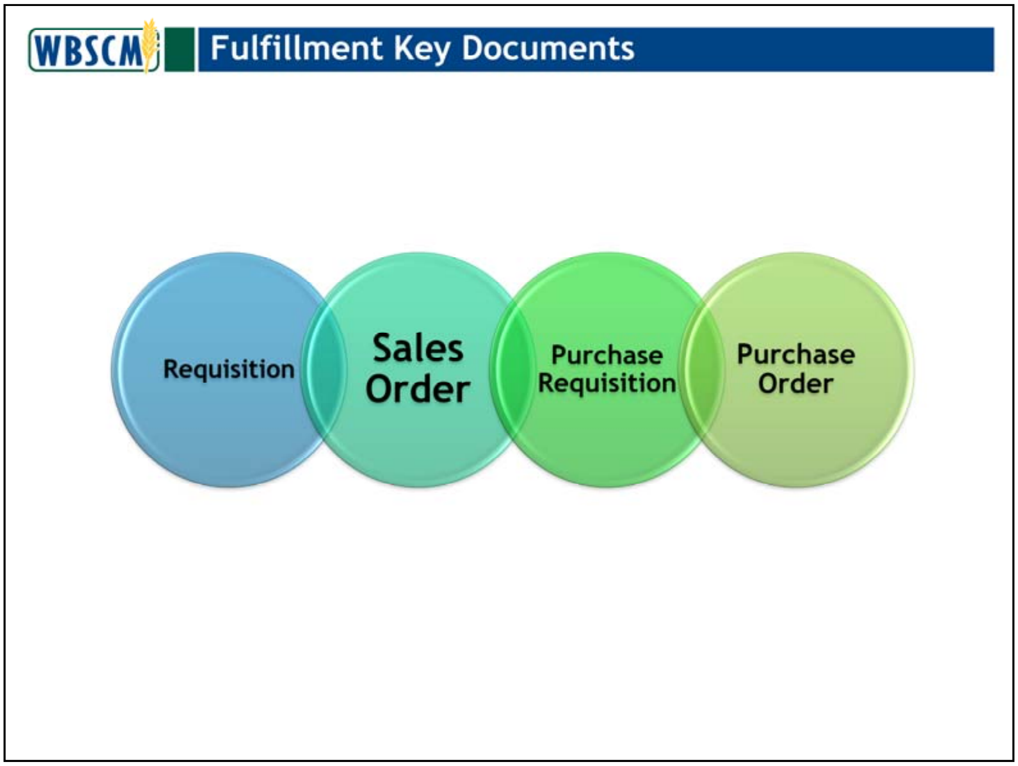
When displaying a user in WBSCM, use the following procedure:



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



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.

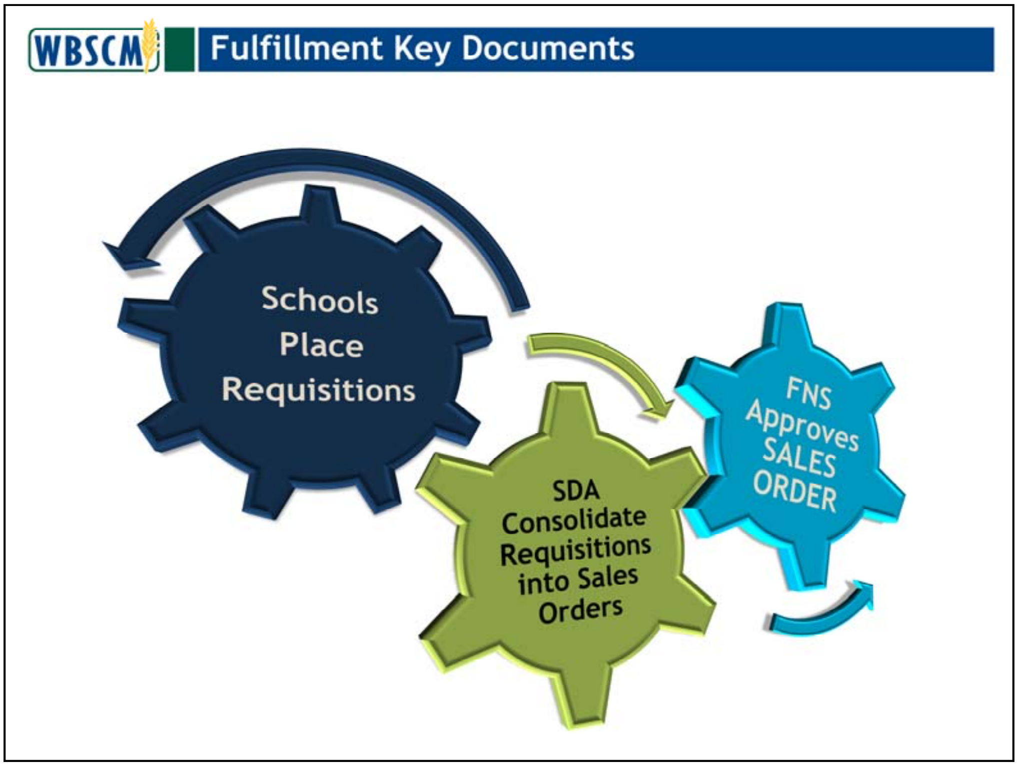
Fulfillment Key Documents

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.

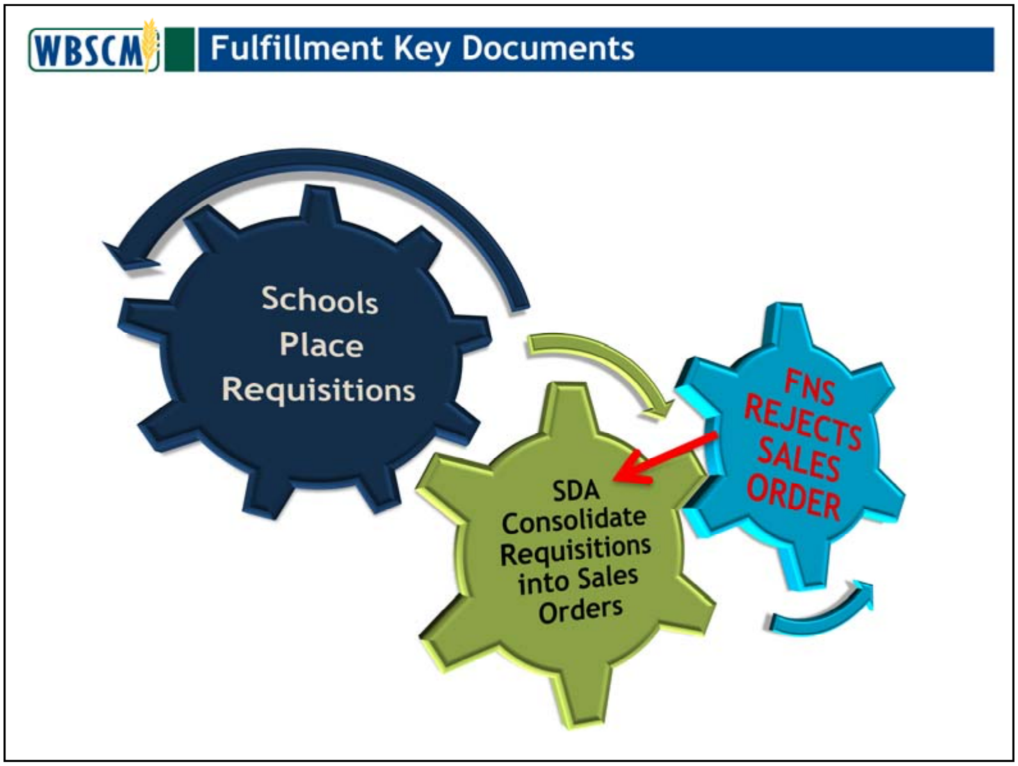
The domestic sales order is the most frequent type of order. Occasionally, however, other types of orders are processed in Web SCM to accommodate unique program needs. Three types of other orders which you might see in Web SCM are emergency sales orders, offshore sales orders or redonations, also known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

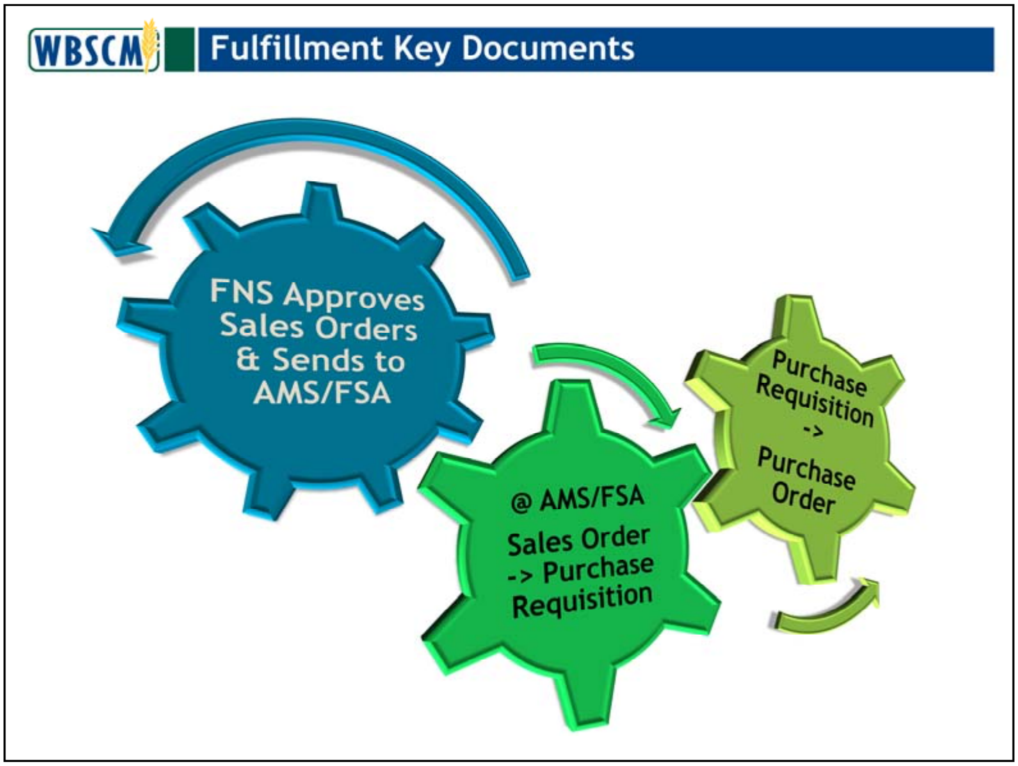
After the SDA approves and consolidates requisitions, and submits the sales order (all done in one simultaneous process), it goes to FNS for approval

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

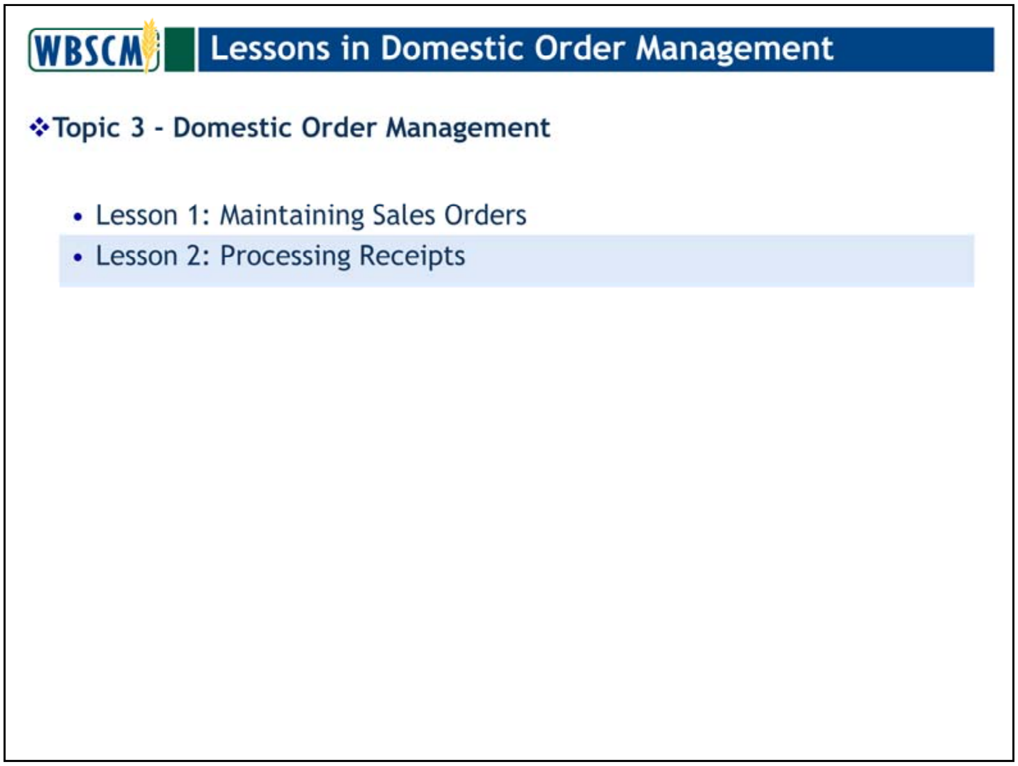


After FNS approves the sales orders they become purchase requisitions and are sent to the Agricultural Marketing Service or Farm Service Agency who will begin the bidding process. Once a contract is awarded to a supplier for goods, the purchase requisition becomes a purchase order.

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.



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.

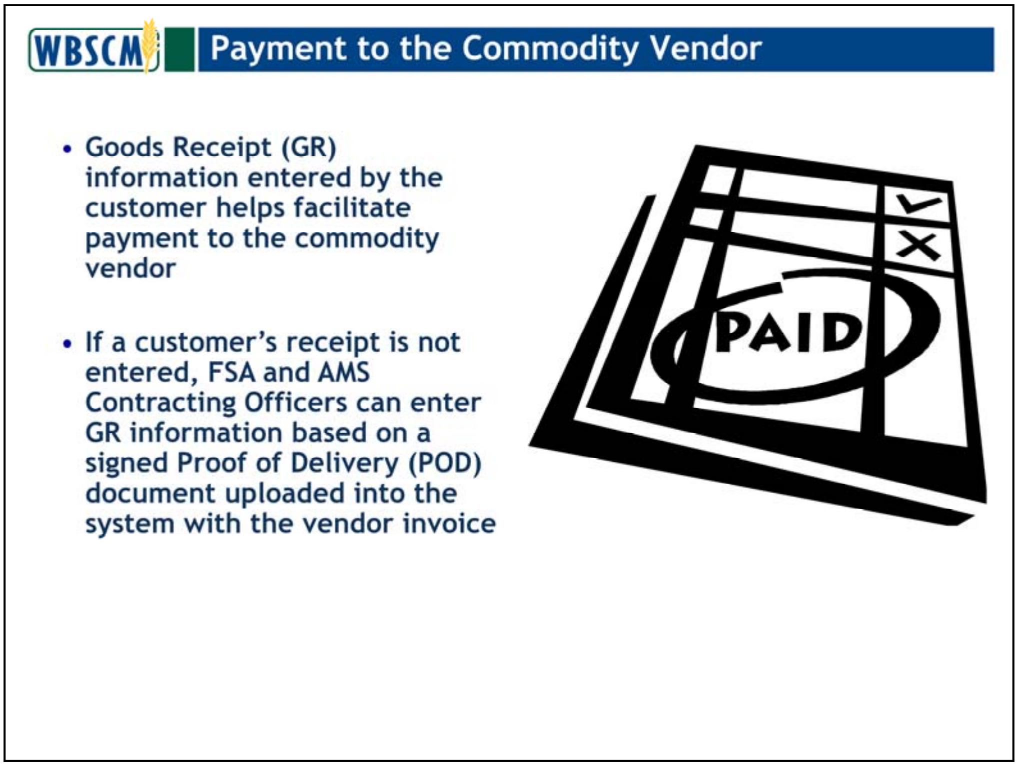
Description – This is a free text field where the customer may enter information about the shipment. For example, if there was damage, this field is used to describe the damage, whether the damage poses a food safety concern, and whether they are requesting a refund or replacements.

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.

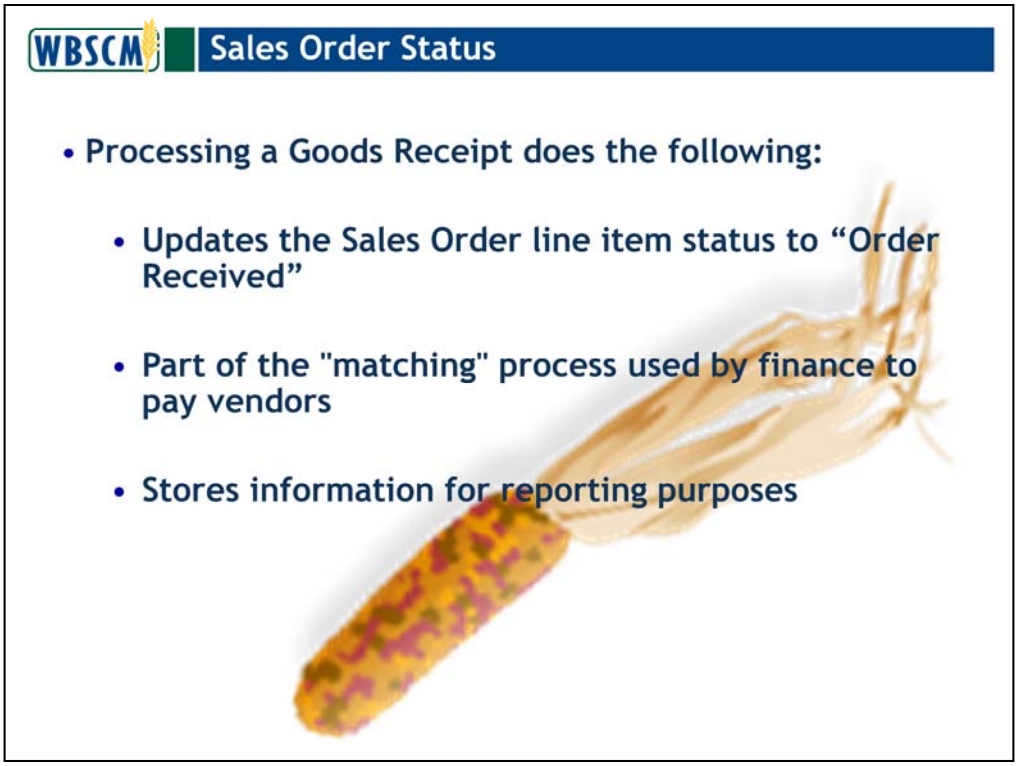
How To Submit a Complaint

- 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.

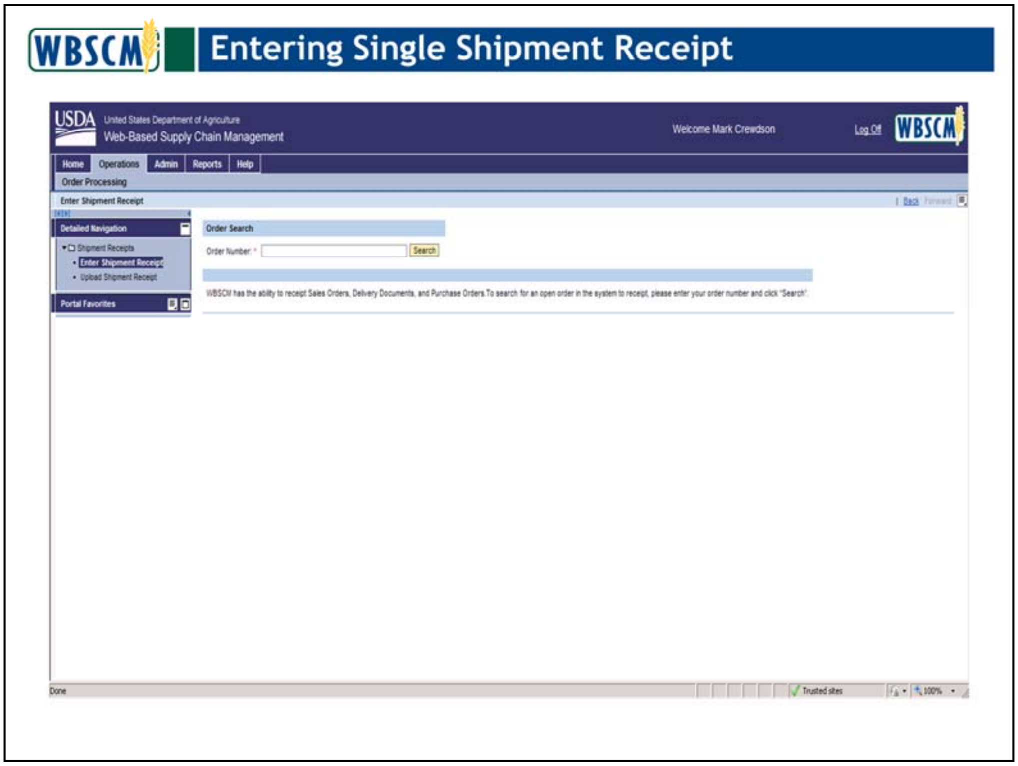
(Read the slide)



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.



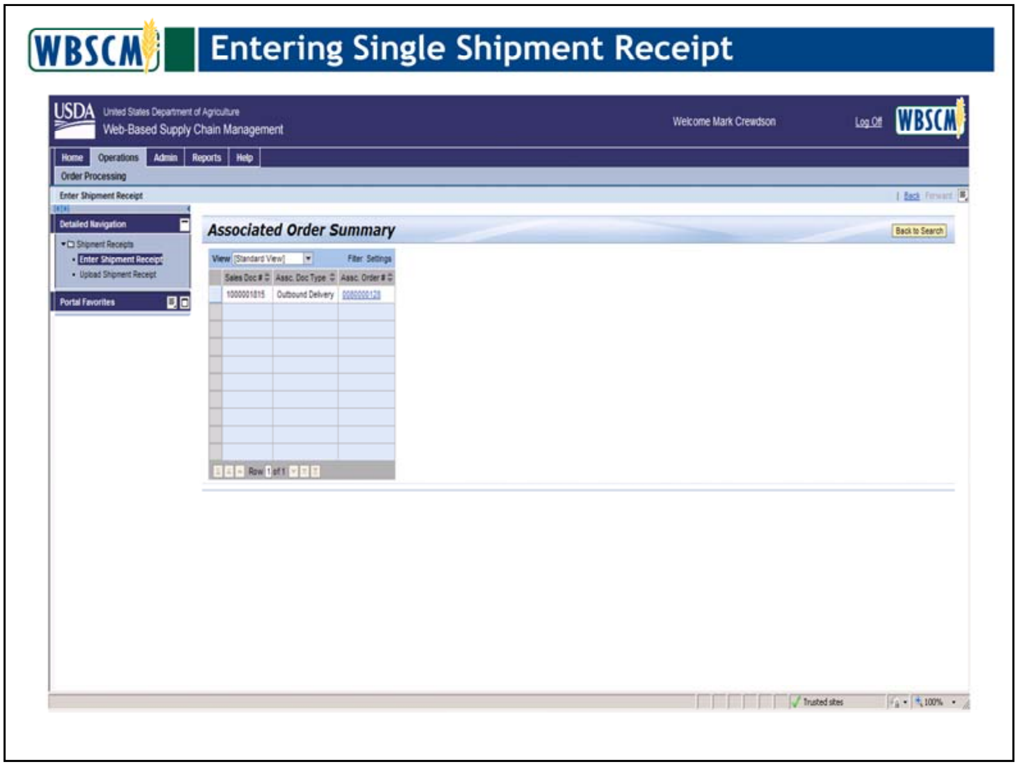
(Read the slide)



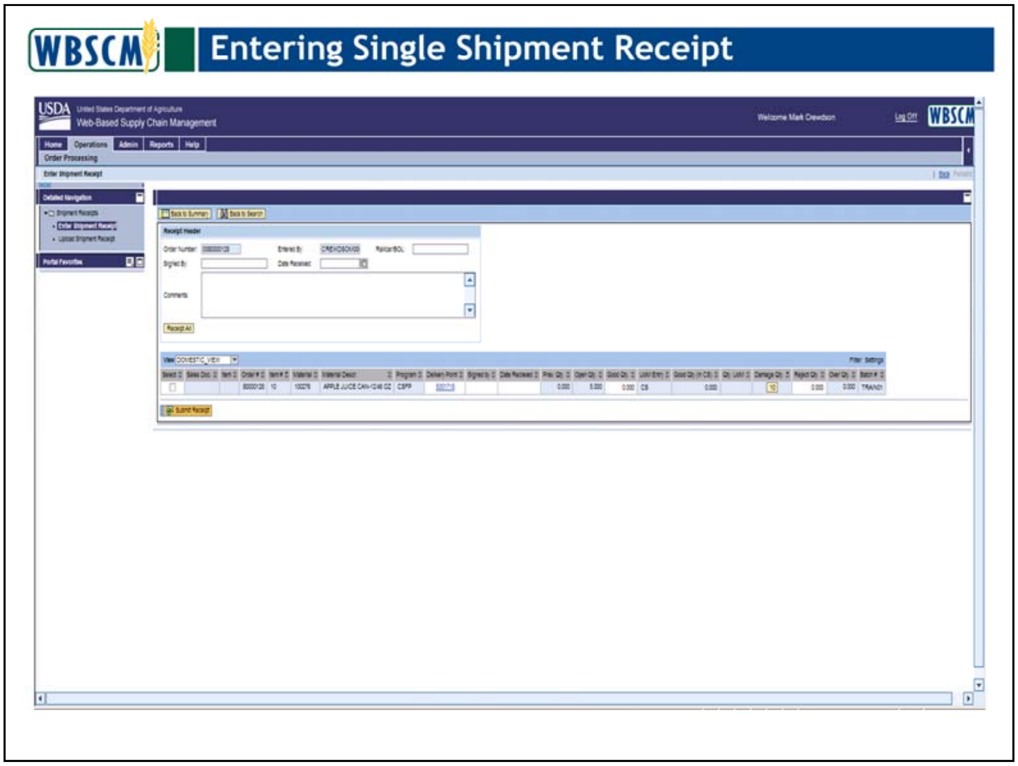
The processor is responsible for entering a shipment receipt in Web SCM when goods are delivered. To do this in Web SCM, click on the: Operations tab >, Order Processing tab >, Shipment Receipts folder > and Enter Shipment Receipt link.

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.



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.



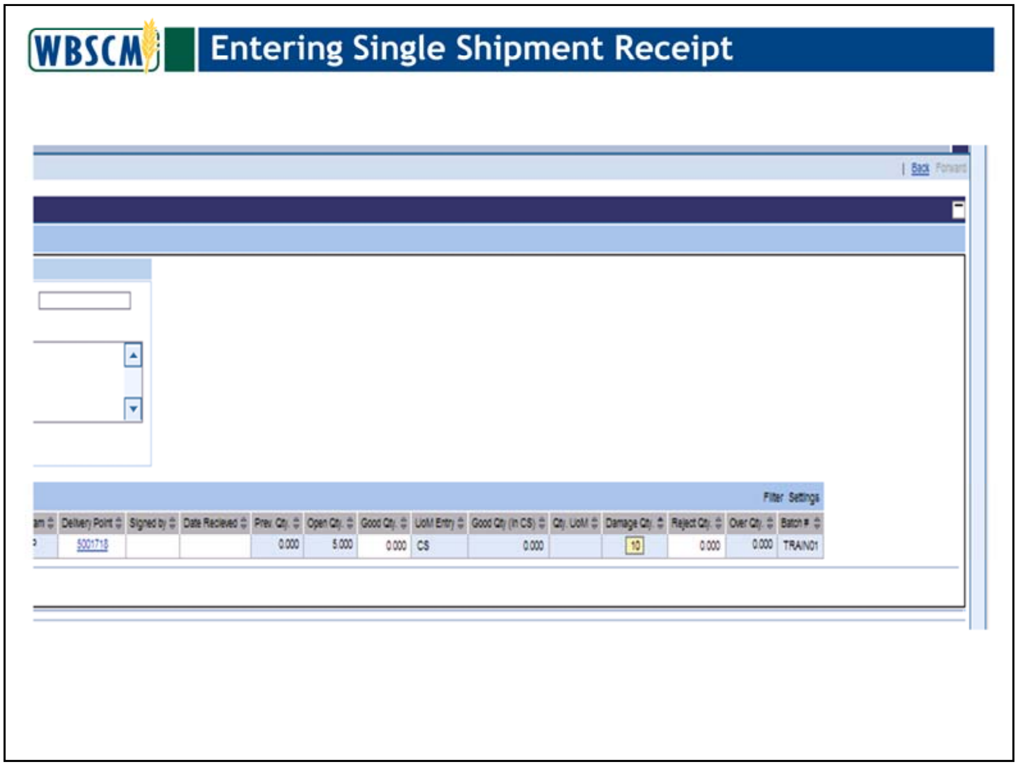
Within the order, there may be multiple line items. Select the line item you wish to receipt, by checking the checkbox in the **Row** column.

Enter the following fields:

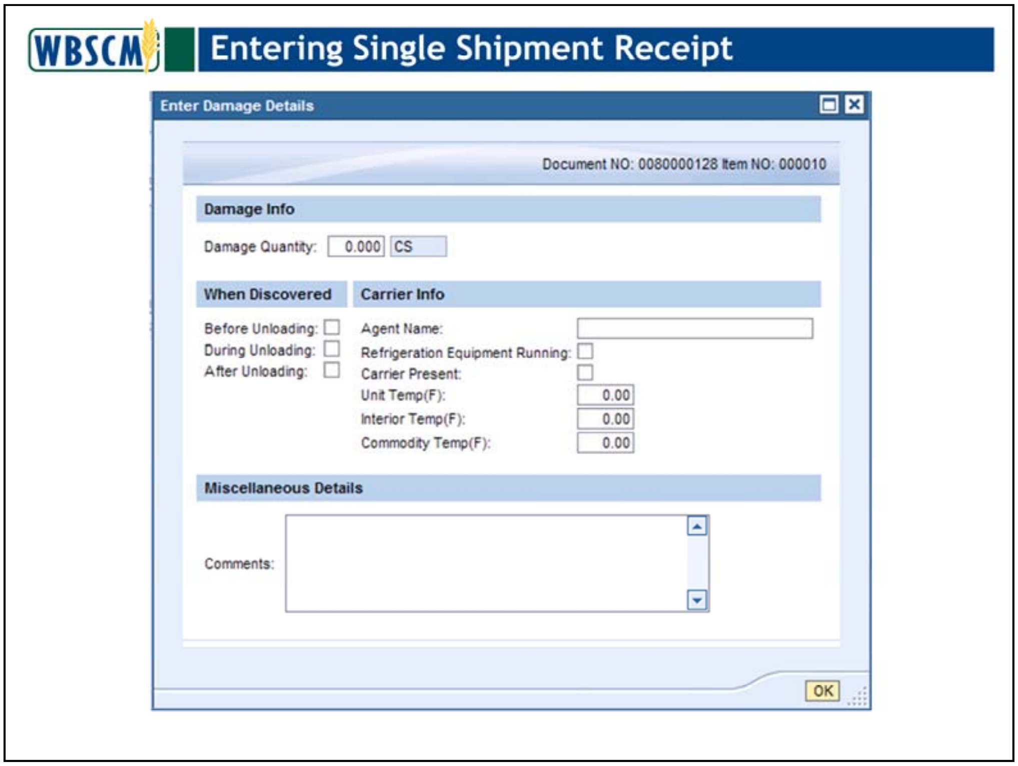
- **Signed By**: Person at the customer organization who signed for the delivery
- **Date Received**: Date on which the delivery was signed for
- **Railcar/BOL**: Document number for the bill of lading
- **Comments**: Free text field for entry of comments about the delivery

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.



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



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.

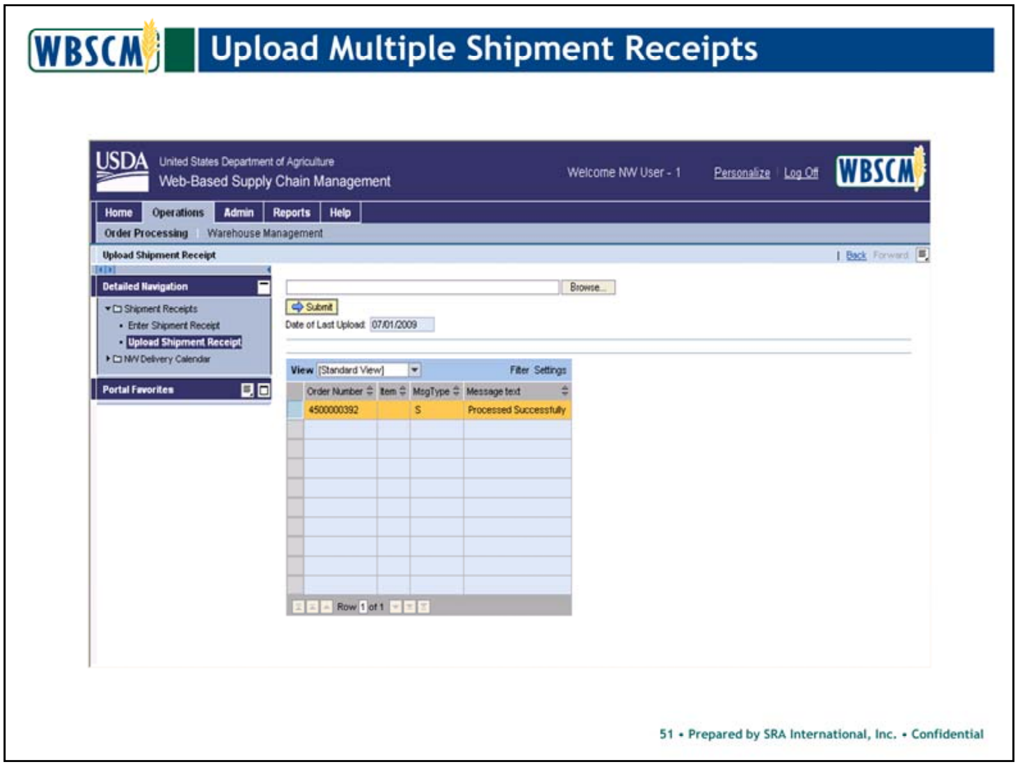
RBJ58

WBSCM

Upload Multiple Shipment Receipts

- Processors can upload batches of shipment receipts consisting or 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.

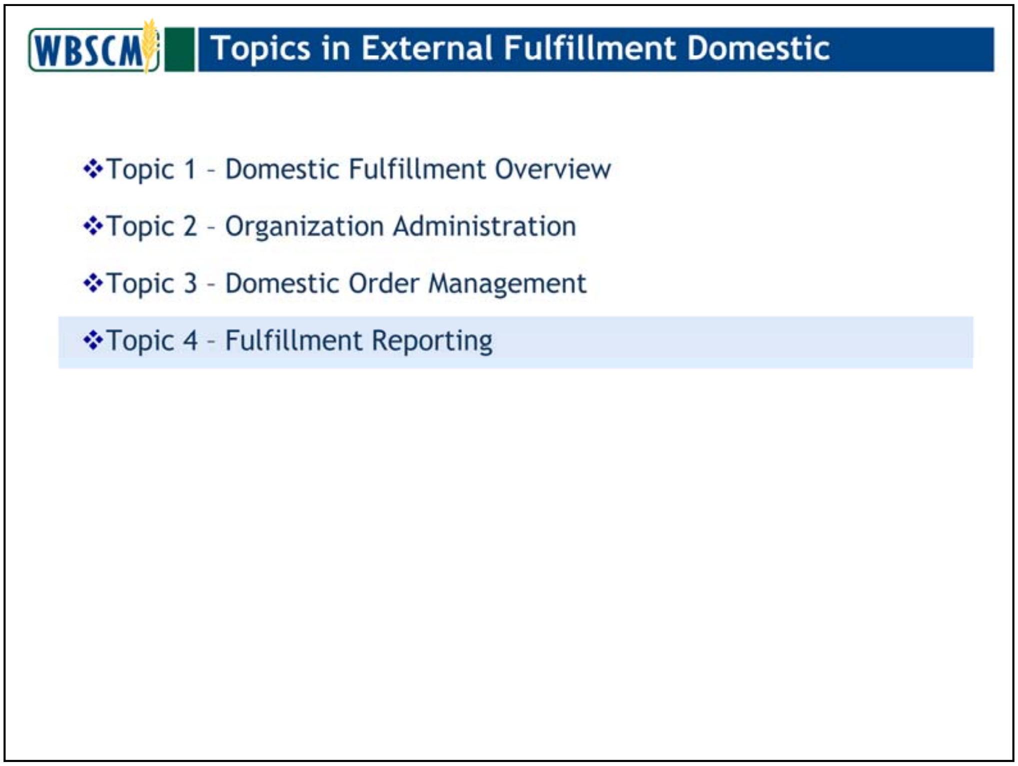
Click Browse, and locate the shipment receipt batch file you desire to upload.

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.



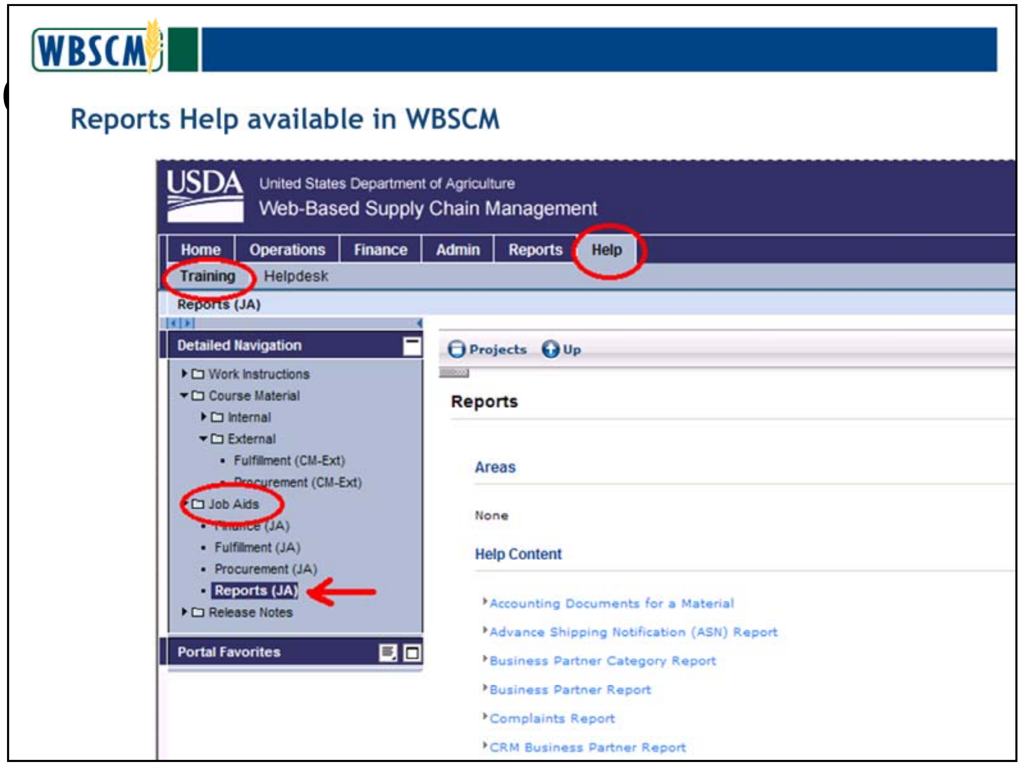
Fulfillment Reporting

EXT300-SDA Order Manag

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 Manag



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.

EXT300-SDA Order Manag

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.

EXT300-SDA Order Manag

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.

EXT300-SDA Order Manag

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.

EXT300-SDA
Order
Manag

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.

EXT300-SDA Order Manag

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

EXT300-SDA Order Manag

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.

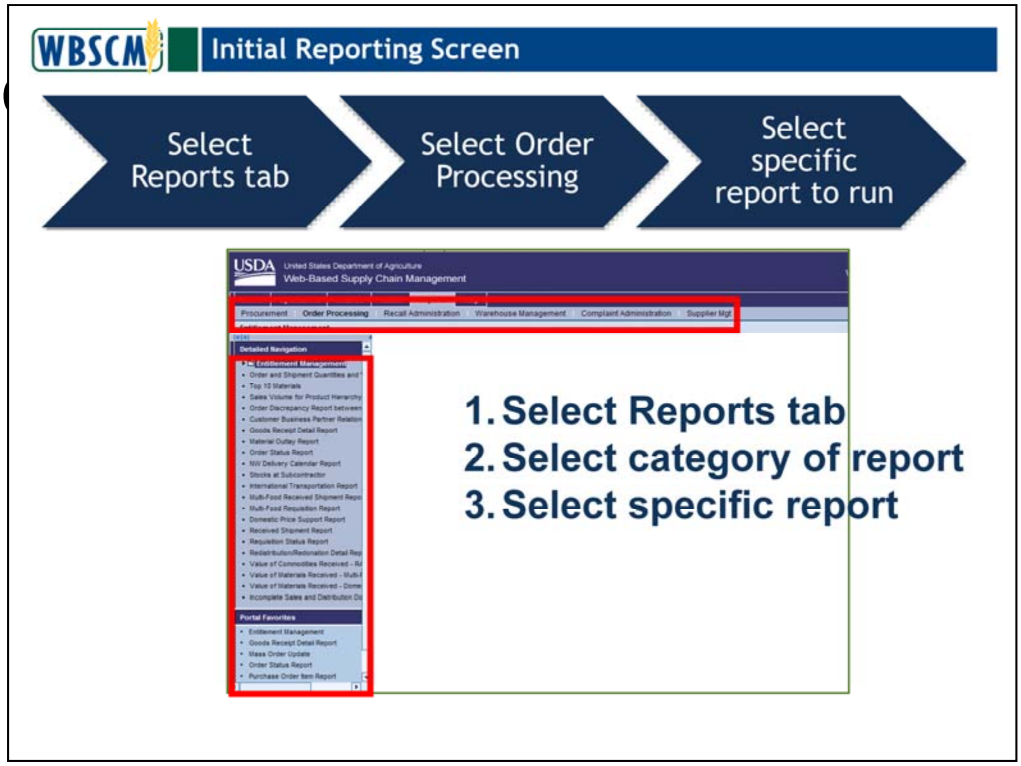
Notes:

Path: Admin > Manage Users > User Security Report

EXT300-SDA Order Manag

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.

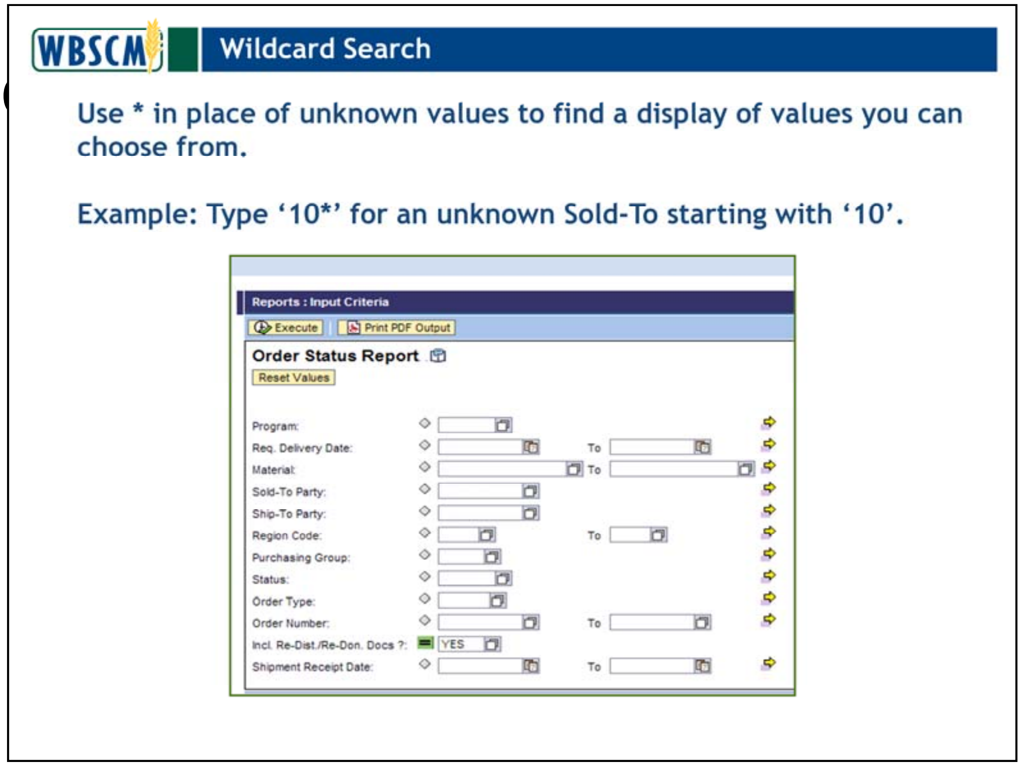
EXT300-SDA Order Manag



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.

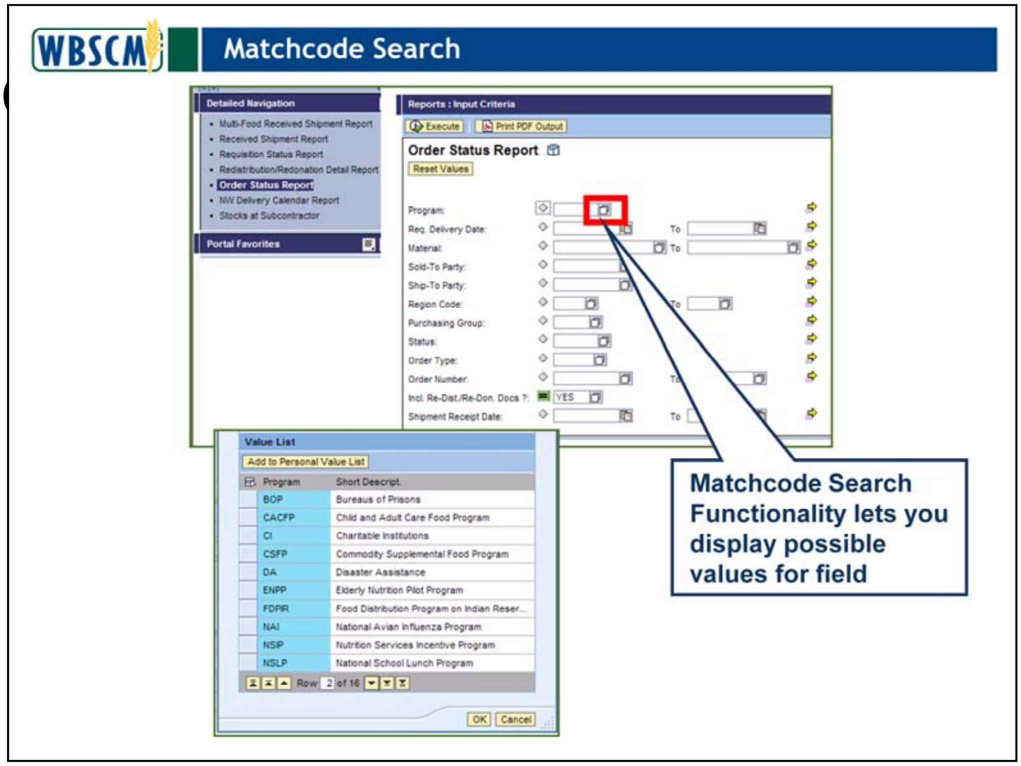
EXT300-SDA Order Manag



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.

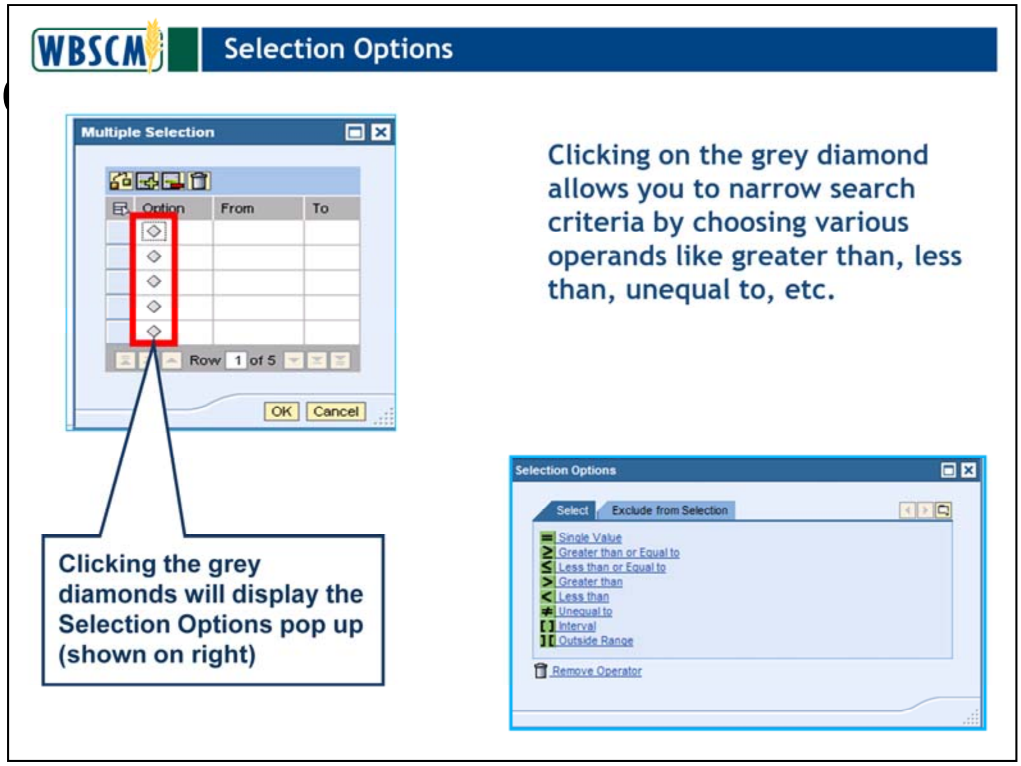
If you know the value for a particular field, you may enter it in the field. If you do not know the exact value, you can perform a **wildcard search**. A wildcard search uses an asterisk in place of unknown values. For example, if you wish to display sold-to parties that start with “10” type “10*” in 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).

EXT300-SDA Order Manag



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”.

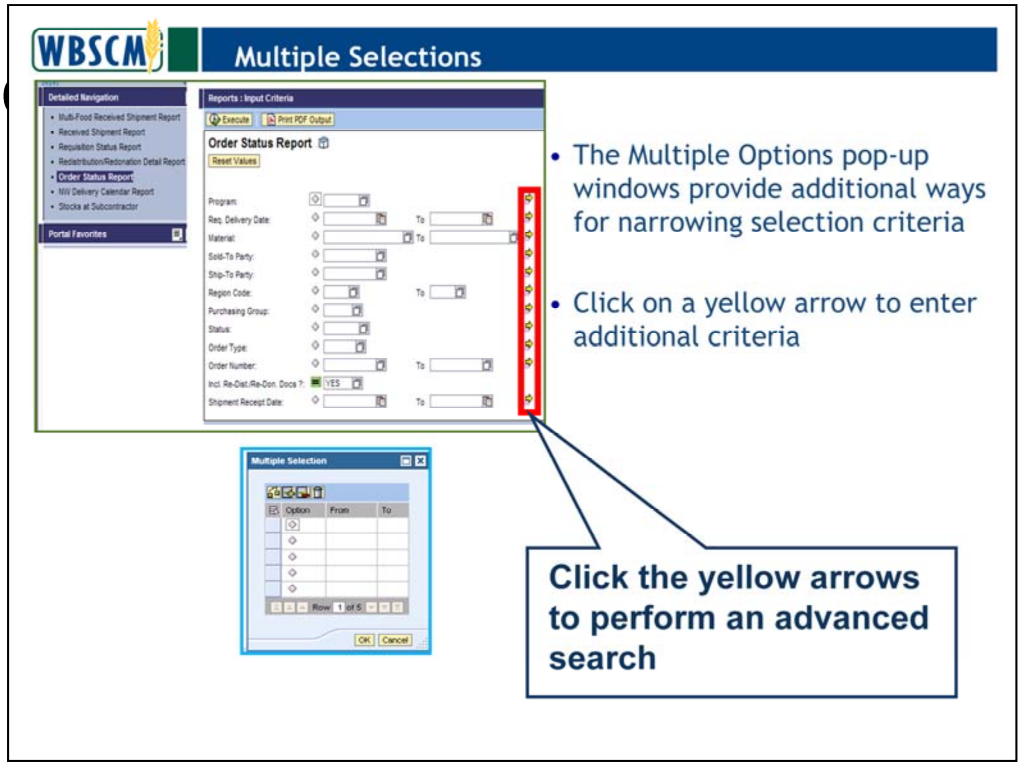
EXT300-SDA Order Manag



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.

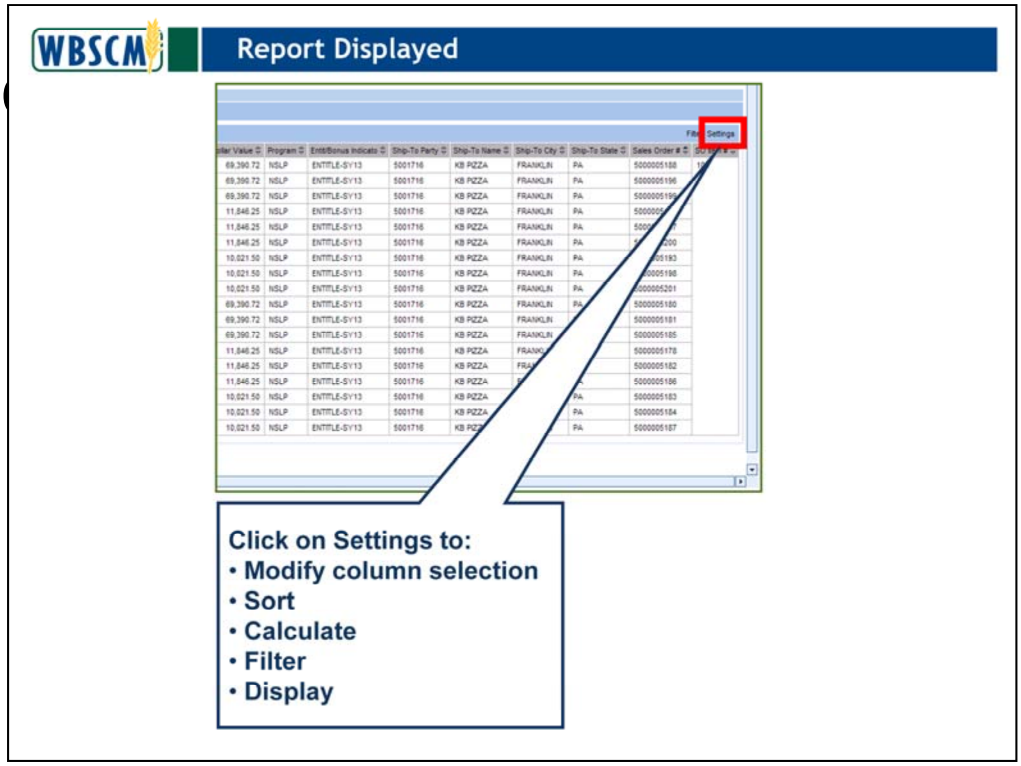
The grey diamond buttons display the **Selection Options** pop-up window. This allows you to use various operands like greater than, less than, unequal to, etc. Choose the desired operand, then continue entering criteriain the fields.

EXT300-SDA Order Manag



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.

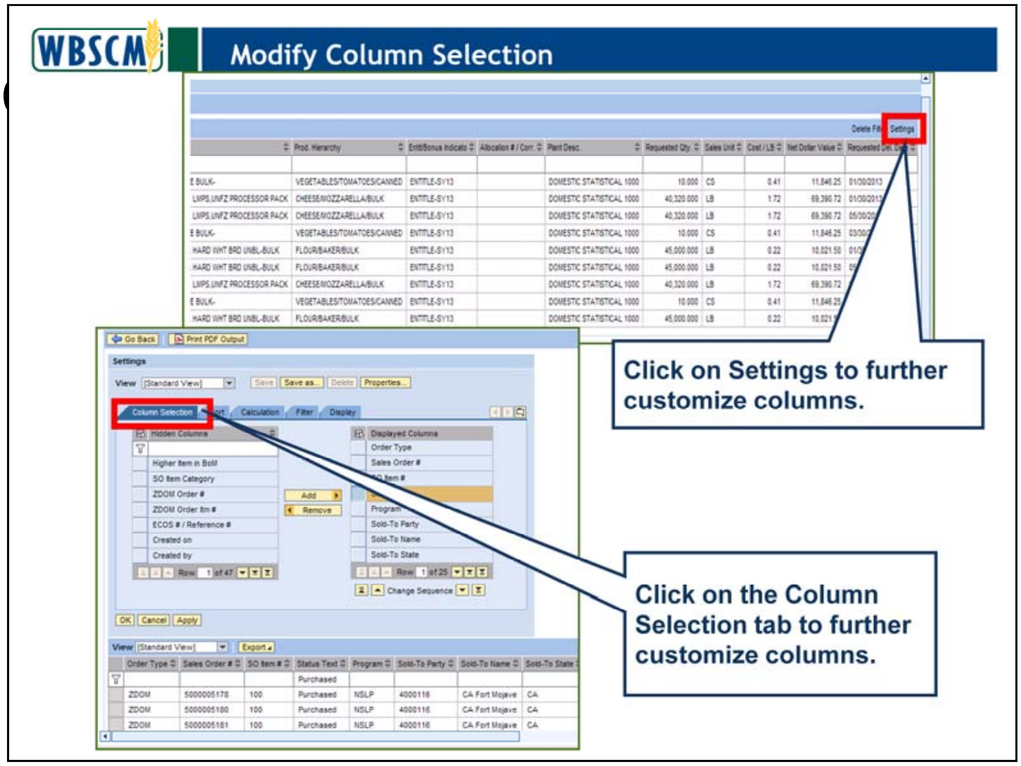
EXT300-SDA Order Manag



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.

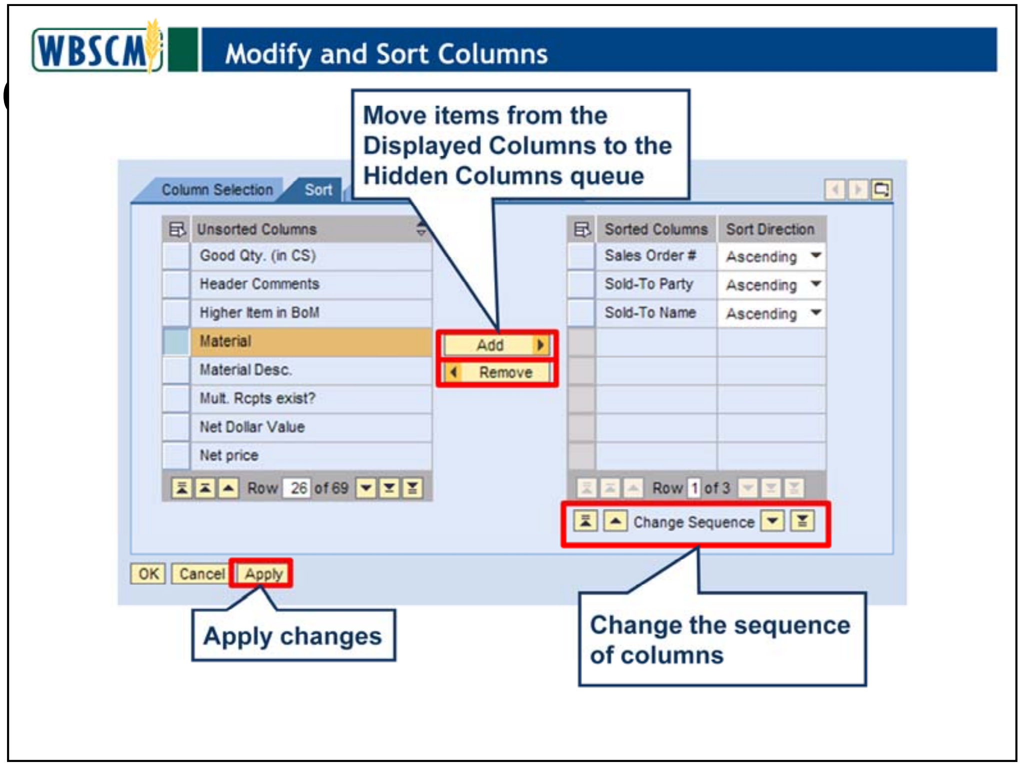
On the top right-hand side of the screen, click on Settings to:
Modify column selection, sort results, do calculations, create a filter, and/or change the display.

EXT300-SDA Order Manag



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 Manag



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

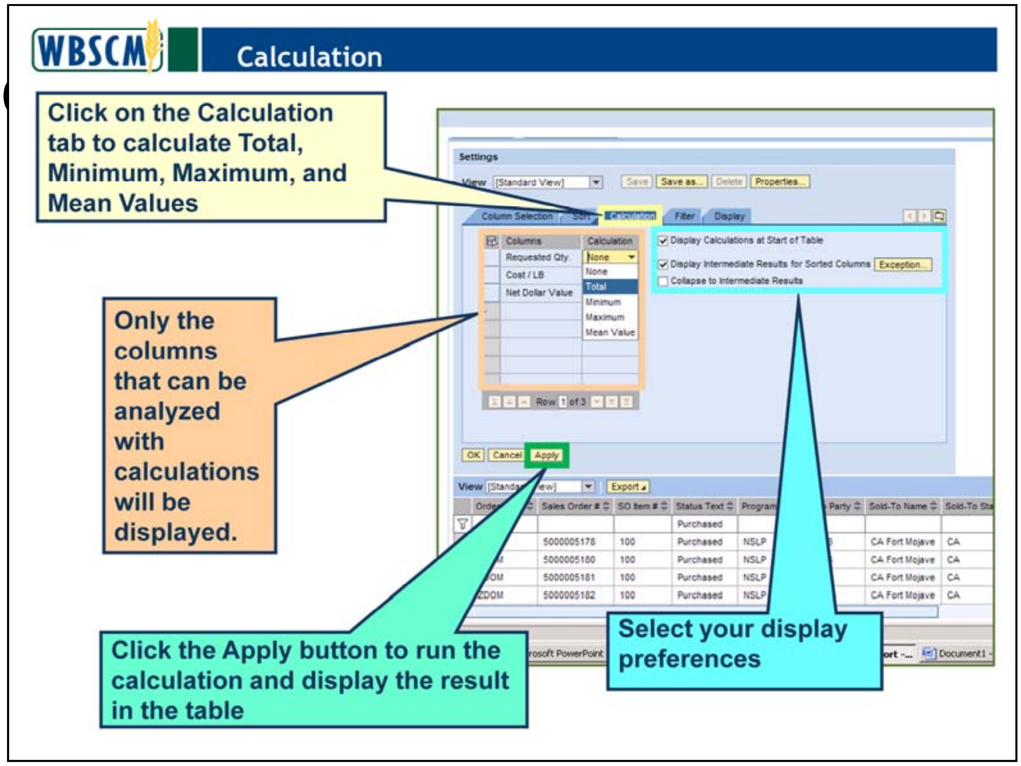
To add a column to the report, select it in the **Hidden Columns** table and click the **Add** button.

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 Manag



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.

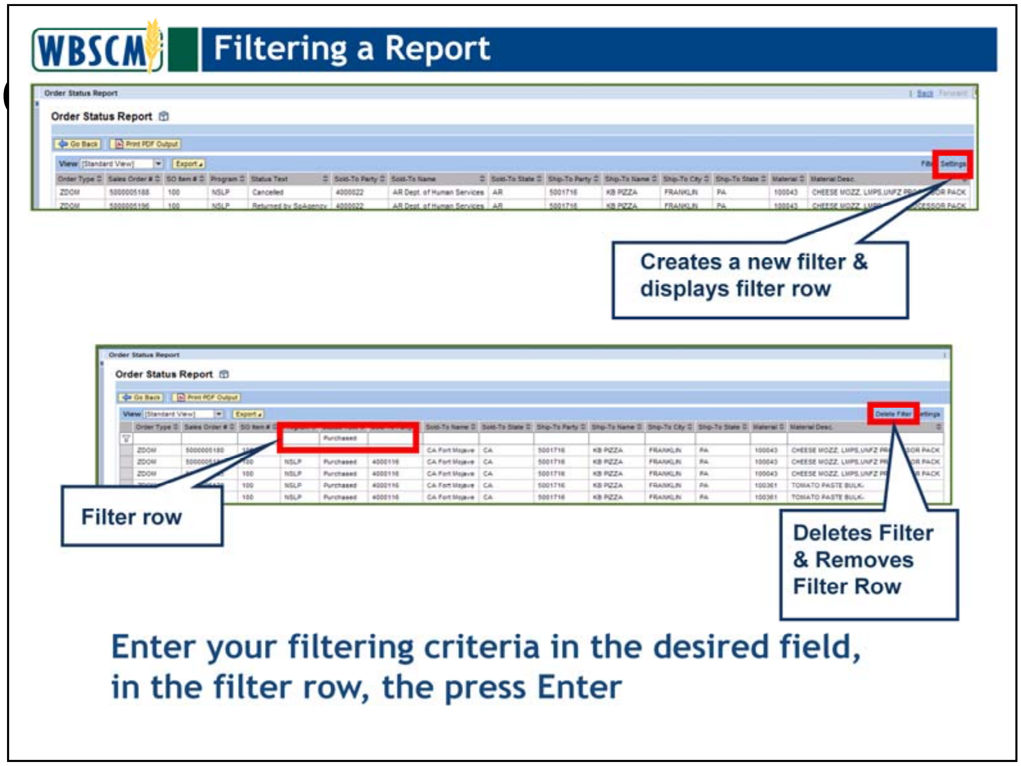
If the “Display Calculations at the Start of Table” checkbox is unchecked, the results will display at the bottom of the table.

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 Manag

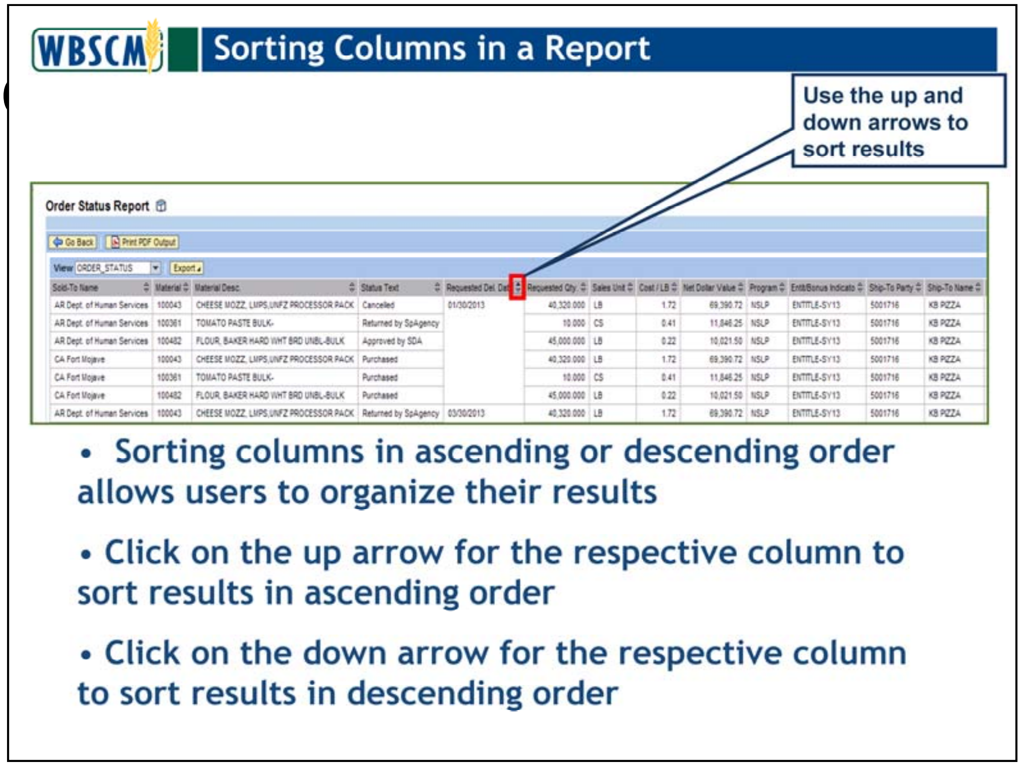


Filtering allows you to display only results that contain a specified entry in a specified field. There are two ways to filter a report in Web SCM, the easy, user friendly way or the little more cumbersome way. We are going to show you the easy way that allows you to enter your filter values directly in the filter row above the report instead of choosing the columns one by one.

To begin filtering, instead of clicking on the Filter tab under Settings, you will want to exit the Settings screen and click on the Filter link next to the Settings link. A blank filter row will display on the screen where you may specify your criteria. Enter criteria for one or more fields in the blank row and press the Enter key. The columns will be filtered accordingly.

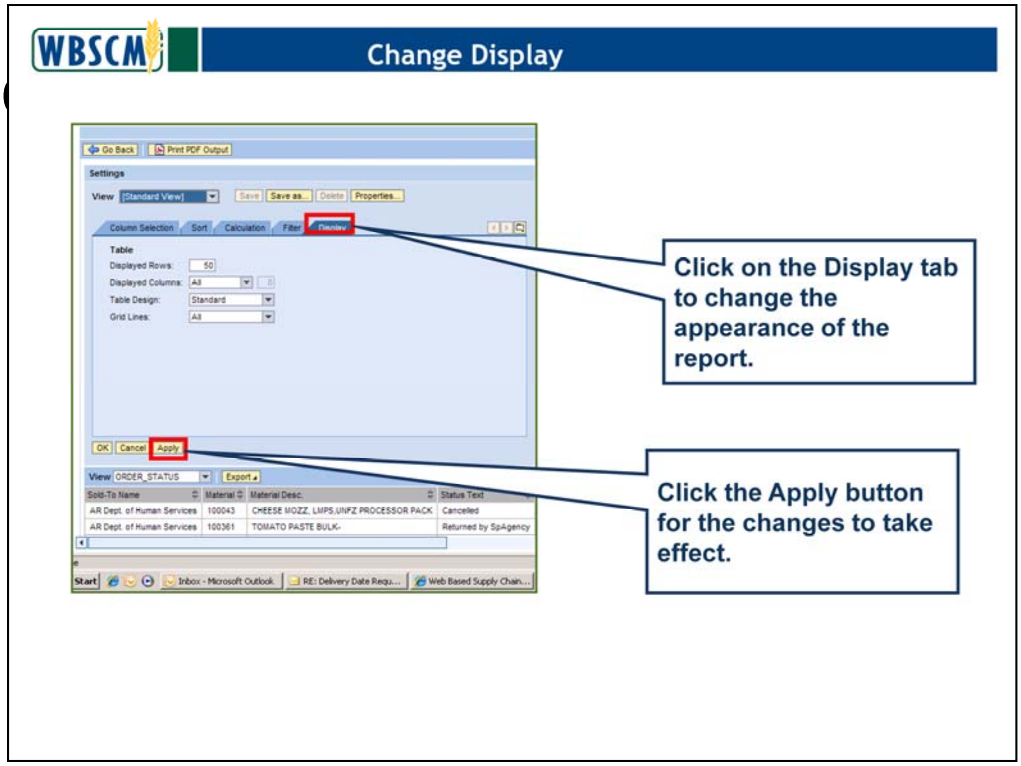
To remove the filter, click the Delete Filter link.

EXT300-SDA Order Manag



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.

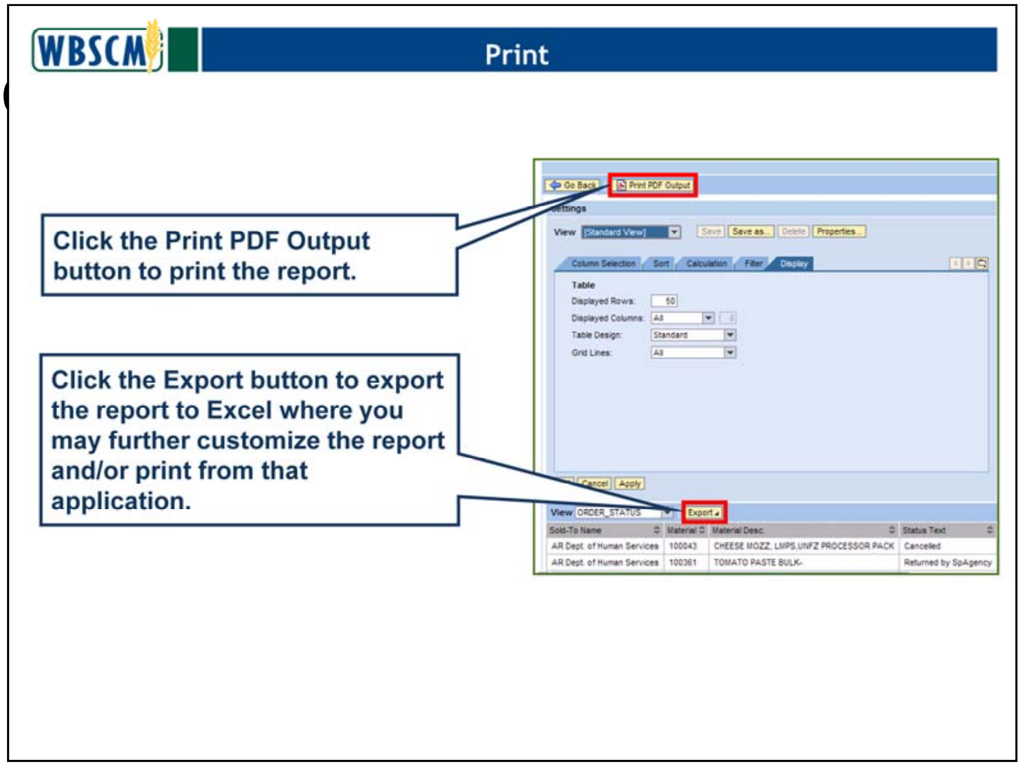
EXT300-SDA Order Manag



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.

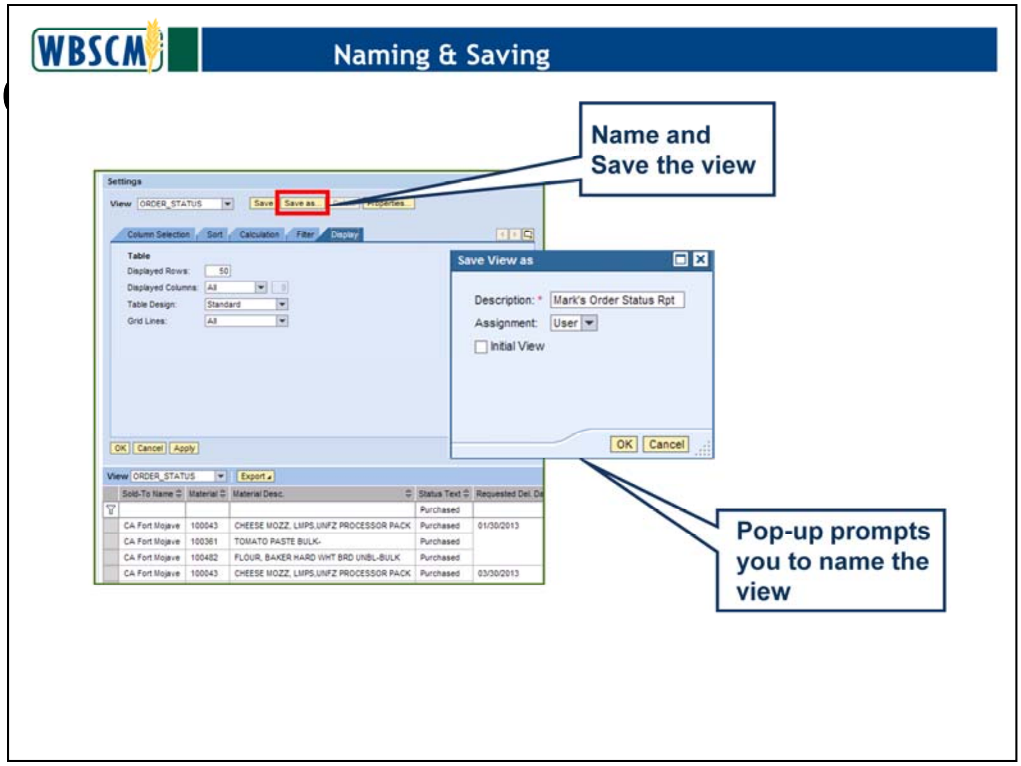
EXT300-SDA Order Manag



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 Manag



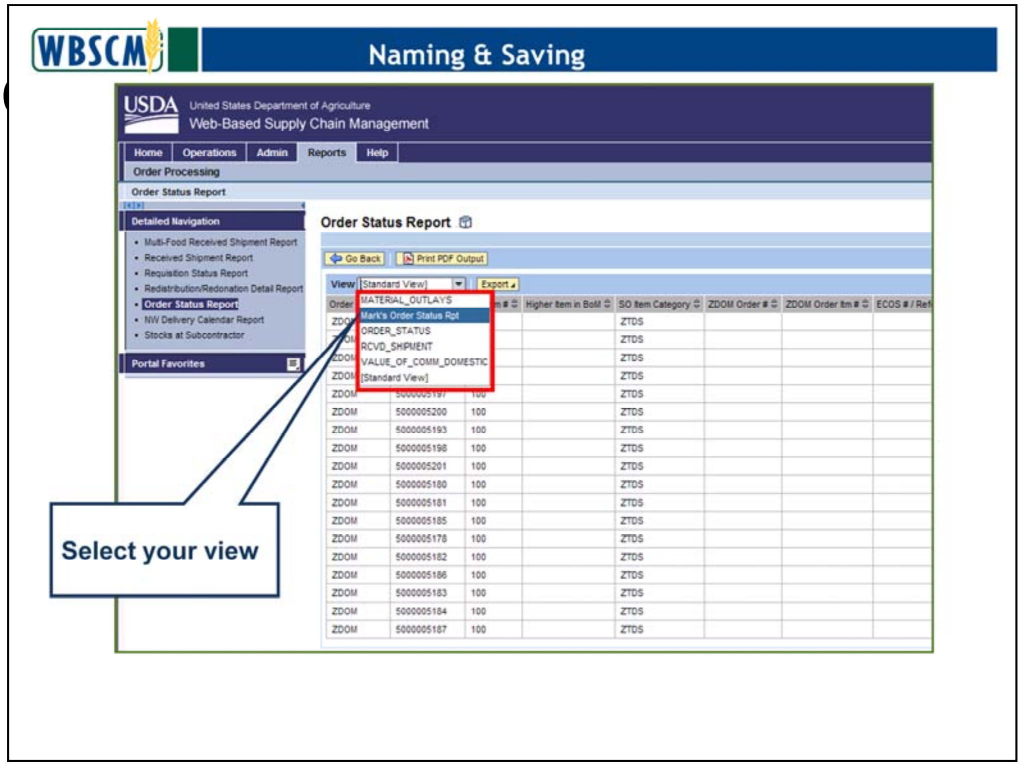
You may choose to save your view. By saving your view, you will be able to apply these report customizations anytime you run this report simply by choosing your saved view from the View dropdown box.

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.

EXT300-SDA Order Manag



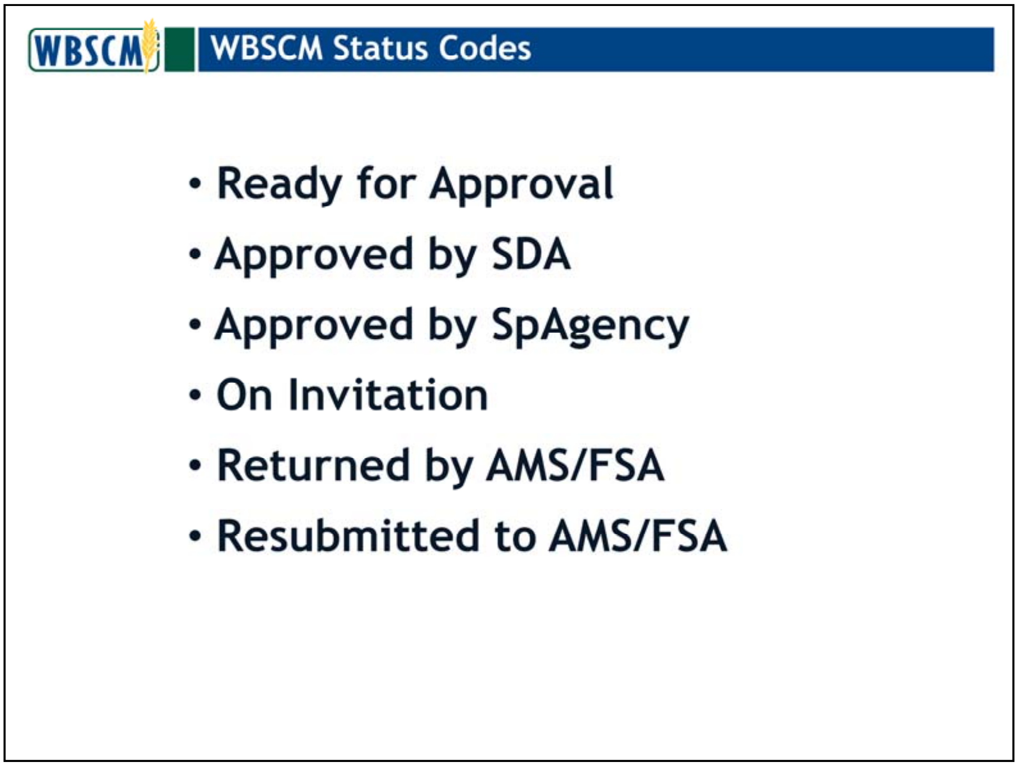
To display your customized view and automatically apply all settings that were part of your saved view the next time you run a report, select the saved view from the **View** dropdown box.

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

WBSCM Reports Discussion

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.



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.

EXT300-SDA Order Manag

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

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.

Wrap up

- Thank you for your time!!!

Thank you
for your participation