

Enterprise Data Management  
As-Is Process Flows and Narratives

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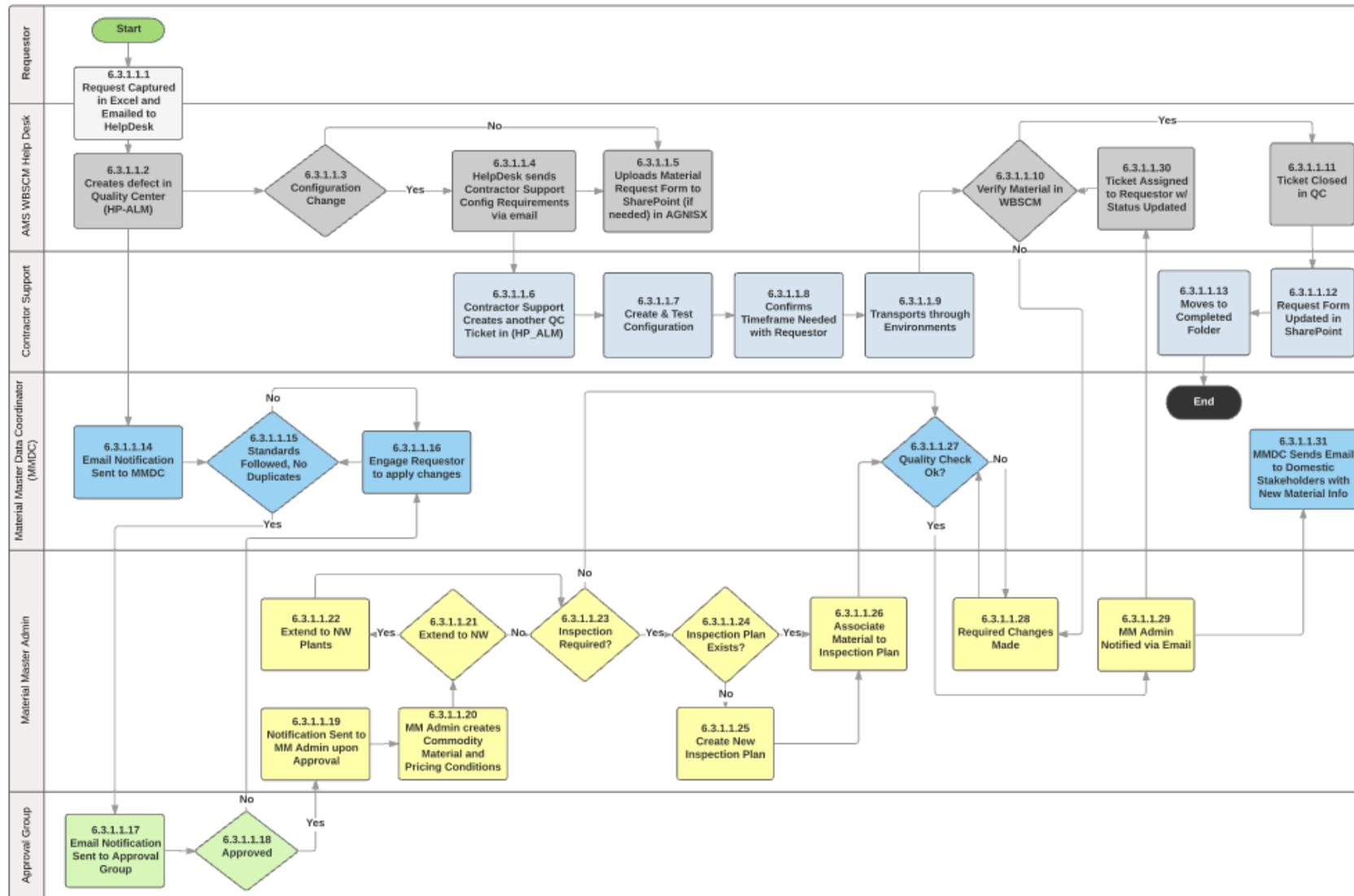
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### 6.3.1.1 Create & Update Materials

# Enterprise Data Management As-Is Process Flows and Narratives

## 6.3.1.1 MASTER DATA MANAGEMENT - CREATE & UPDATE MATERIALS

BMI Domestic Team | April 29, 2016



## Enterprise Data Management As-Is Process Flows and Narratives

### 6.3.1.1.1 Create Material Request

- The material request is first captured in Excel and emailed to the Help Desk.

### 6.3.1.1.2 Defect Created

- The AMS WBSCM Help Desk uses the requirements supplied in the Excel workbook to generate a defect in Quality Center (HP-ALM).
- **Note:** The request most frequently is initiated by an AMS-DC or AMS-KC commodity specialist. If the request is originated by FNS, then they create the QC ticket to initiate the process and step (6.3.1.1.1) is not required.

### 6.3.1.1.3 Determine Configuration

- The AMS WBSCM Help Desk determines whether a configuration change is required based on packaging requirements. This usually depends on whether a hierarchy for the required pack size was already developed but the determination may include other factors.

### 6.3.1.1.4 Incident Created

- The AMS WBSCM Help Desk sends the new configuration requirements to the Contractor Support team via email.

### 6.3.1.1.5 Request Form Uploaded to a Shared Repository

- The AMS WBSCM Help Desk also uploads the Material Request Form to a designated shared repository. This action is performed on an as-needed basis.

### 6.3.1.1.6 Creation of QC Ticket for Contractor Support

- Once the notification of the configuration request is received, Contractor Support then creates another QC Ticket in (HP\_ALM) in order to track the development work the team is required to perform. Note this process is concurrent with the standards and inspection process (shown in dark blue in the above diagram).

### 6.3.1.1.7 Create & Test Configuration

- The Contractor Support team creates and tests the new configuration prior to placing it in production.

### 6.3.1.1.8 Confirmation of New Material Timeframe

- Contractor Support then confirms the timeframe needed with the original requestor.

### 6.3.1.1.9 Transport through Environments

- Contractor Support transports the new material configuration through all environments and for verification by the AMS WBSCM Help Desk.

## Enterprise Data Management As-Is Process Flows and Narratives

### 6.3.1.1.10 Verify Config/Material in WBSCM

- The AMS WBSCM Help Desk verifies the material configuration in WBSCM

### 6.3.1.1.11 Ticket Closed in QC

- After verifying the material configuration, the AMS WBSCM Help Desk then closes the QC ticket.

### 6.3.1.1.12 Request Form Updated in SharePoint

- Contractor Support updates the request form in SharePoint (ASGNISX) with the new status.

### 6.3.1.1.13 Move Request to Completed Folder

- The Material Request form is moved to the completion folder in SharePoint (AGNISX).

### 6.3.1.1.14 Email Notification Sent to MMDC

- After the Help Desk creates the QC ticket (in Step 6.3.1.1.2), an email notification is sent to the Master Material Data Coordinator or (MMDC).

### 6.3.1.1.15 Ensure Standards are Followed

- The MMDC ensures the appropriate standards for material creation were followed and that the request will not generate duplicates.

### 6.3.1.1.16 Engage Requestor to Apply Changes

- The MMDC engages the requestor to apply changes when required.

### 6.3.1.1.17 Email Notification Sent

- Once the MMDC verifies standards have been followed and no duplicates will be generated, an email is sent to the Approval Group.

### 6.3.1.1.18 Approved?

- The Approval Group determines whether the details regarding the new materials are approved.

### 6.3.1.1.19 Notification Sent to MM Admin

- The Approval Group provides notification to the Master Material Admin (MM Admin) once approved.

### 6.3.1.1.20 Commodity Material and Pricing Conditions

## Enterprise Data Management As-Is Process Flows and Narratives

- The MM Admin creates the Commodity Material and Pricing Conditions.

### 6.3.1.1.21 Extend to NW?

- The MM Admin determines whether to extend the new materials to the National Warehouse.

### 6.3.1.1.22 Extend to NW

- If determined, the MM Admin extends the material to the National Warehouse plants.

### 6.3.1.1.23 Inspection Required?

- The MM Admin determines whether inspection is required.

### 6.3.1.1.24 Inspection Plan Exists?

- If an Inspection Plan is required, the MM Admin determines whether an existing inspection plan exists for that material type.

### 6.3.1.1.25 Create New Inspection Plan

- If required, the MM Admin will create a new Inspection Plan.

### 6.3.1.1.26 Associate Material to Existing Inspection Plan

- Once the Inspection Plan is in place, the MM Admin associates the new material to the Inspection Plan.

### 6.3.1.1.27 Quality Check

- The MMDC then applies the appropriate Quality Check.

### 6.3.1.1.28 Required Changes Made

- If required after the quality check, the necessary changes are made.

### 6.3.1.1.29 MM Admin Notified via Email

- The MM Admin is notified via Email.

### 6.3.1.1.30 Ticket Assigned to Requestor w/ Status Updated

- The ticket is assigned to requestor w/ status updated.

### 6.3.1.1.31 Domestic Stakeholders Updated with New Material Info

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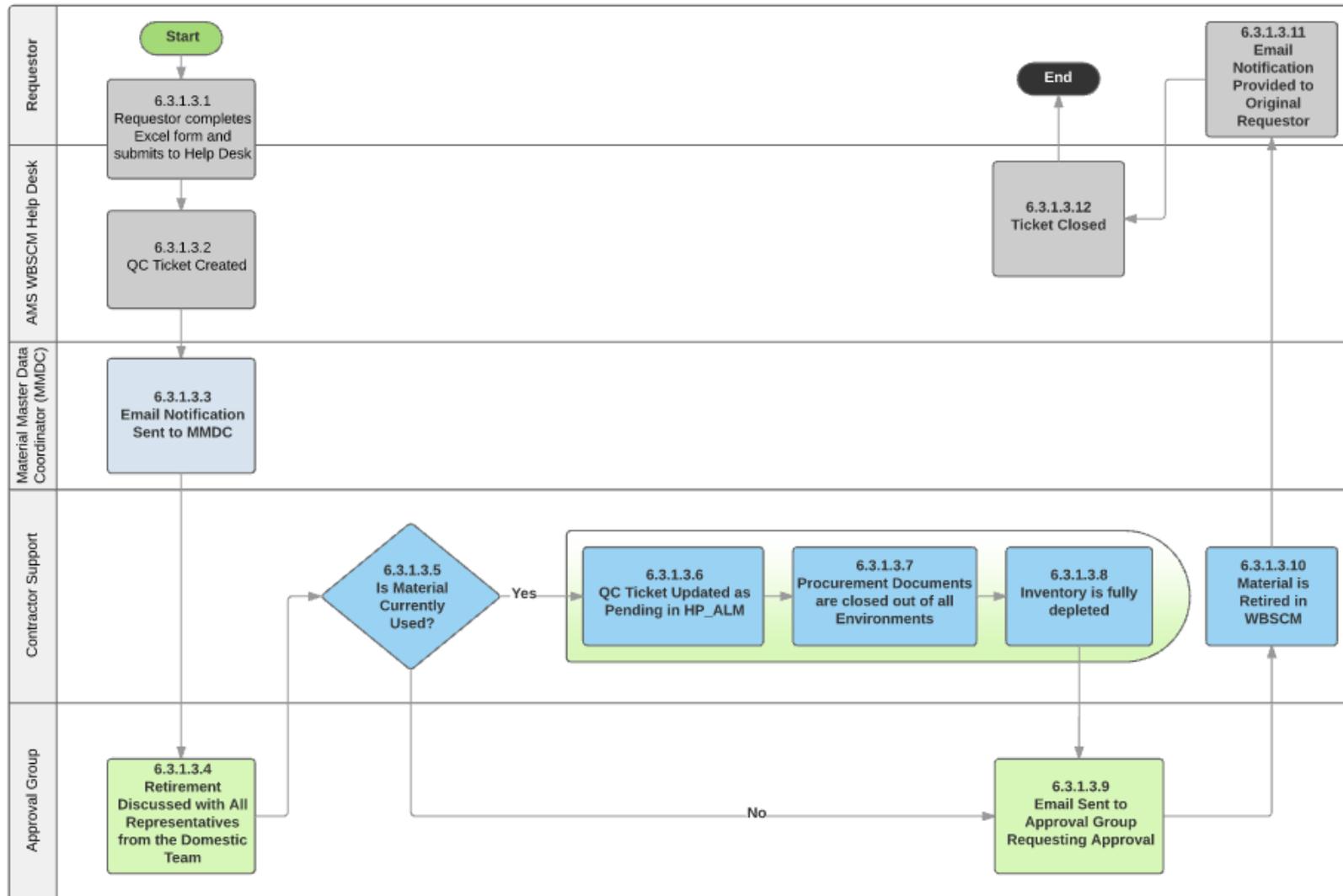
- The MMDC sends an email to the domestic stakeholders with the relevant new material information.

### 6.3.1.3 Retire Materials

# Enterprise Data Management As-Is Process Flows and Narratives

## 6.3.1.3 MASTER DATA MANAGEMENT - RETIRE MATERIALS

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## Enterprise Data Management As-Is Process Flows and Narratives

### 6.3.1.3.1 Request to Retire Material Submitted to Help Desk

- FNS or other agency initiates request by completing Excel form and sending to the AMS WBSCM Help Desk via email.
- Note that if the request is originated by FNS, then they create the QC ticket to initiate the process and step (6.3.1.3.1) is not required.

### 6.3.1.3.2 QC Ticket Created

- Upon receipt of the request, the QC ticket is created in HP-ALM.

### 6.3.1.3.3 Email Notification Sent to MMDC

- An email notification is then supplied to the Master Material Data Coordinator (MMDC).

### 6.3.1.3.4 Retirement of Material Communicated

- The request to retire the material is communicated to and discussed with all representatives from the Domestic Team.

### 6.3.1.3.5 Is Material Currently Used?

- Contract Support determines whether the material is currently used.

### 6.3.1.3.6 QC Ticket Updated as Pending

- The QC ticket is updated as pending in HP-ALM.

### 6.3.1.3.7 Waiting for Procurement Docs to be Closed

- Contractor support must wait for all procurement documents related to the material are closed out of all environments.

### 6.3.1.3.8 Inventory is Fully depleted

- Contractor Support must also wait until the inventory for the material fully depleted.

### 6.3.1.3.9 Email Sent to Approval Group Requesting Approval

- Once the material is no longer being used, an email is sent to the Approval Group

### 6.3.1.3.10 Material is Retired in WBSCM

- Once approval is received, Contractor Support retires the material in WBSCM.

### 6.3.1.3.11 Email Notification Provided to Original Requestor

- An email notification is provided to the original requestor

## Enterprise Data Management As-Is Process Flows and Narratives

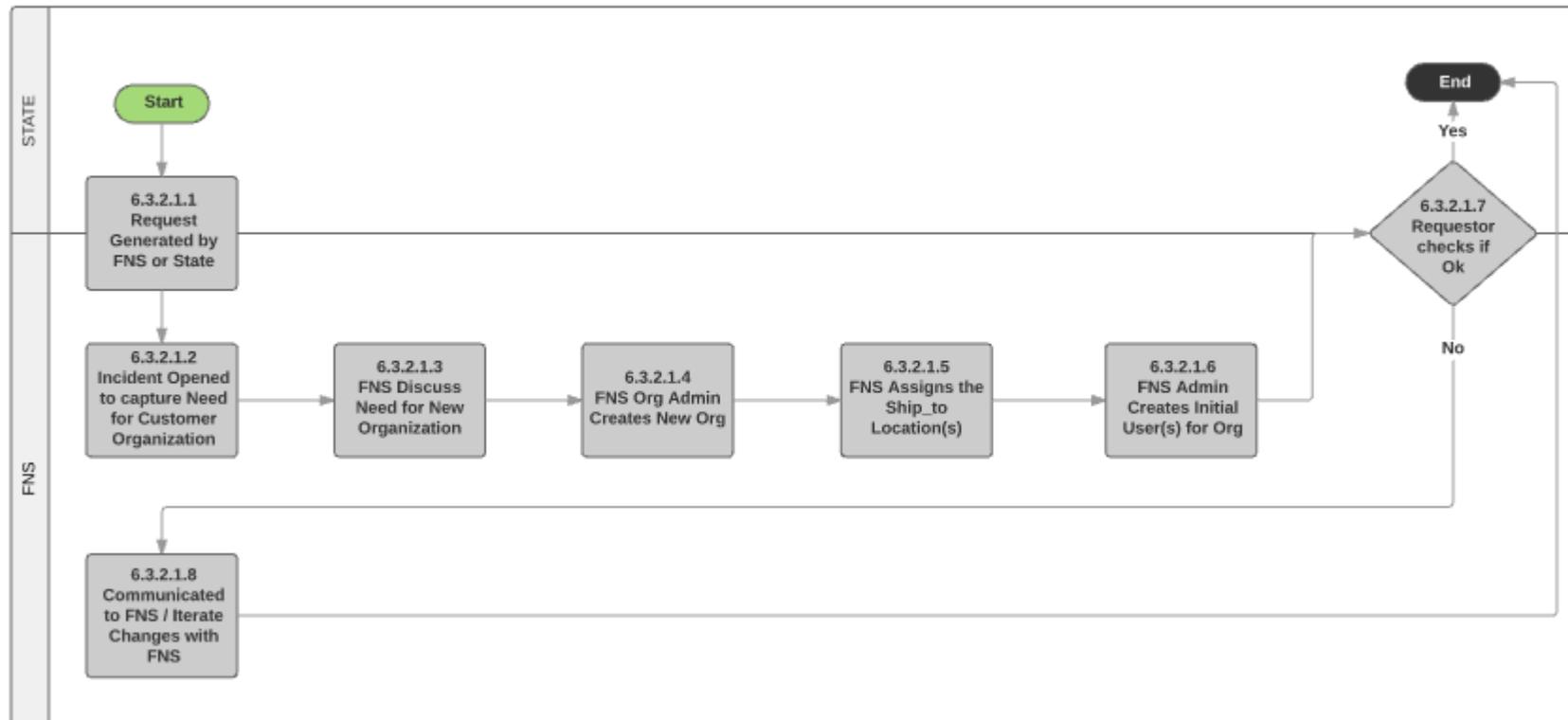
### 6.3.1.3.12 Ticket Closed

- The QC ticket is closed in HP-ALM.

### 6.3.2.1 Create SDAs and ITOs

#### 6.3.2.1 MASTER DATA MANAGEMENT - CREATE CUSTOMER SDA & ITO

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#### 6.3.2.1.1 Request Generated by FNS or State

- The request is initiated by either FNS or the State Agency.

#### 6.3.2.1.2 Incident Opened to Capture Need for Customer Organization

- FNS generates an incident to capture and track the request in HP-ALM.

## Enterprise Data Management As-Is Process Flows and Narratives

### 6.3.2.1.3 FNS Discuss Need for New Organization

- FNS will discuss the need for the new organization with all relevant stakeholders.
- FNS determines the programs for the organization.
- FNS determines whether the National Warehouse is required and Ship-to.

### 6.3.2.1.4 FNS Org Admin Creates New Org

- The FNS organizational admin creates a new organization.

### 6.3.2.1.5 FNS Assigns All Programs, NW, Ship-To(s)

- FNS assigns items discussed in step (6.3.2.1.5). This includes all relevant programs, the national warehouse and Ship-To(s).

### 6.3.2.1.6 FNS Admin Creates Initial Users for Org

- The FNS admin creates the initials user(s) for the organization.

### 6.3.2.1.7 Requestor Checks Changes

- The requestor checks if the organization is “OK” and if so the process ends.

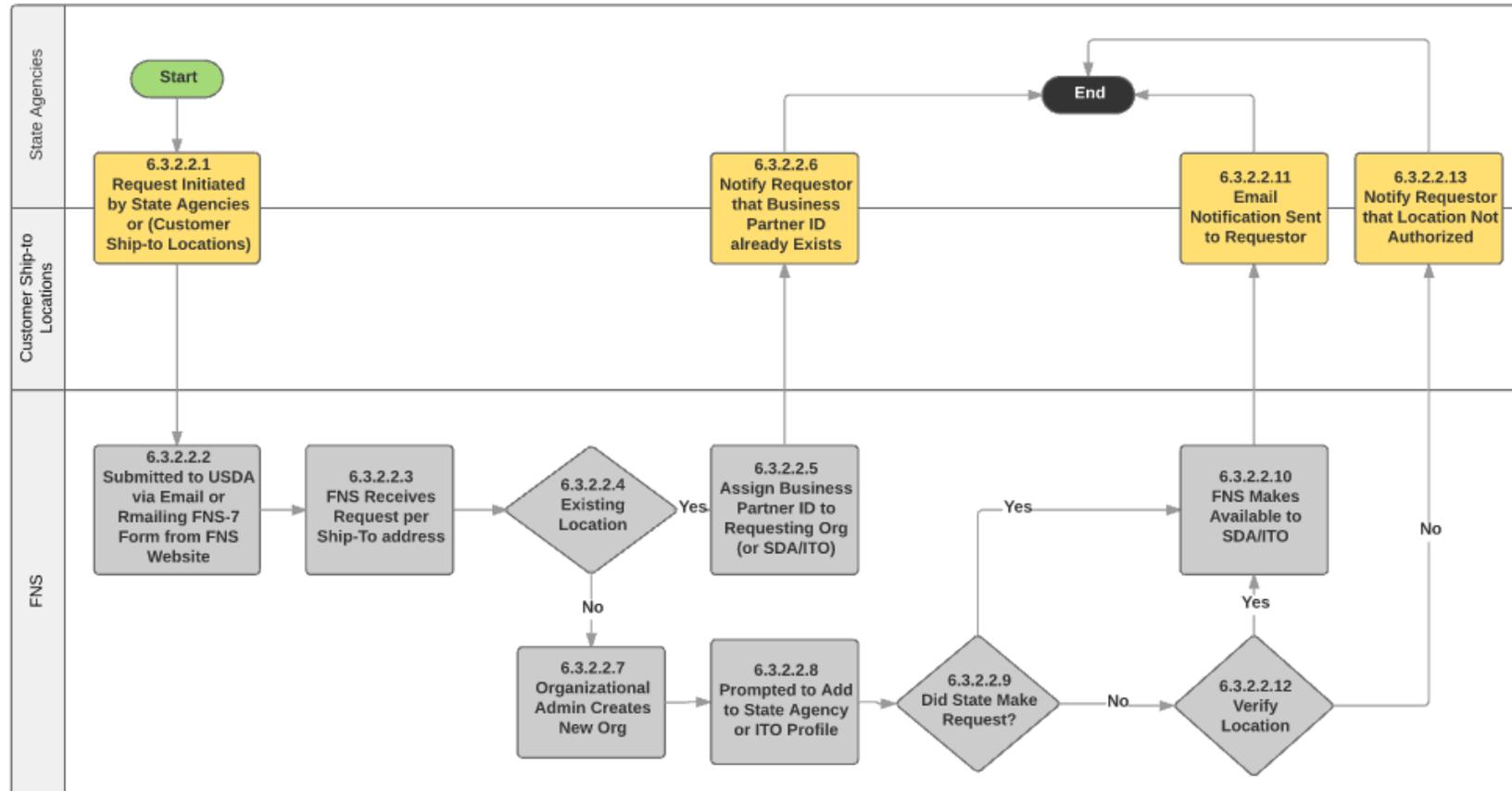
### 6.3.2.1.8 Iterate Changes if Required

- If the requestor does not approve, then changes are applied and iterated until the requestor approves.

### 6.3.2.2 Create Customer Ship-To Locations

#### 6.3.2.2 MASTER DATA MANAGEMENT - CREATE CUSTOMER SHIP-TO LOCATIONS

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#### 6.3.2.2.1 Request Initiated by State Agencies or (Customer Ship-to Locations)

- The request is originated by either the state agency or the Customer Ship-To Location.

#### 6.3.2.2.2 Submitted to USDA via Email or emailing FNS-7 Form from FNS Website

## Enterprise Data Management As-Is Process Flows and Narratives

- The request is generated via email notice or by emailing the FNS-7 Form that is available on the FNS Website.

### 6.3.2.2.3 FNS Receives Request per Ship-To address

- FNS receives and processes the request to update customers “per ship-to address”.

### 6.3.2.2.4 Existing Location

- FNS determines if the customer location request is for a location that already exists.

### 6.3.2.2.5 Assign Business Partner ID to Requesting Org (or SDA/ITO)

- FNS assigns the Business Partner ID to the requesting organization. For domestic purposes, this includes either the State Distribution Agency or the Indian Tribal Organization.

### 6.3.2.2.6 Notify Requestor that Business Partner ID Already Exists

- If the location already exists, the requestor is notified that the business partner ID already exists and the request terminates.

### 6.3.2.2.7 FNS Organizational Admin Creates New Org

- If the location is determined not to already exist, the organizational admin creates the new organization in WBSCM.

### 6.3.2.2.8 Add State Agency or ITO Profile

- FNS is then prompted to add the State Agency or ITO to the profile.

### 6.3.2.2.9 Did State Make Request?

- FNS must then determine whether the state originated the request.

### 6.3.2.2.10 FNS Creates and Makes Available to SDA/ITO

- If the state originated the request, then FNS creates and makes the location available to the SDA/ITO in WBSCM.

### 6.3.2.2.12 Verify Location

- If the state did not originate the request then the location must be verified with the requestor.

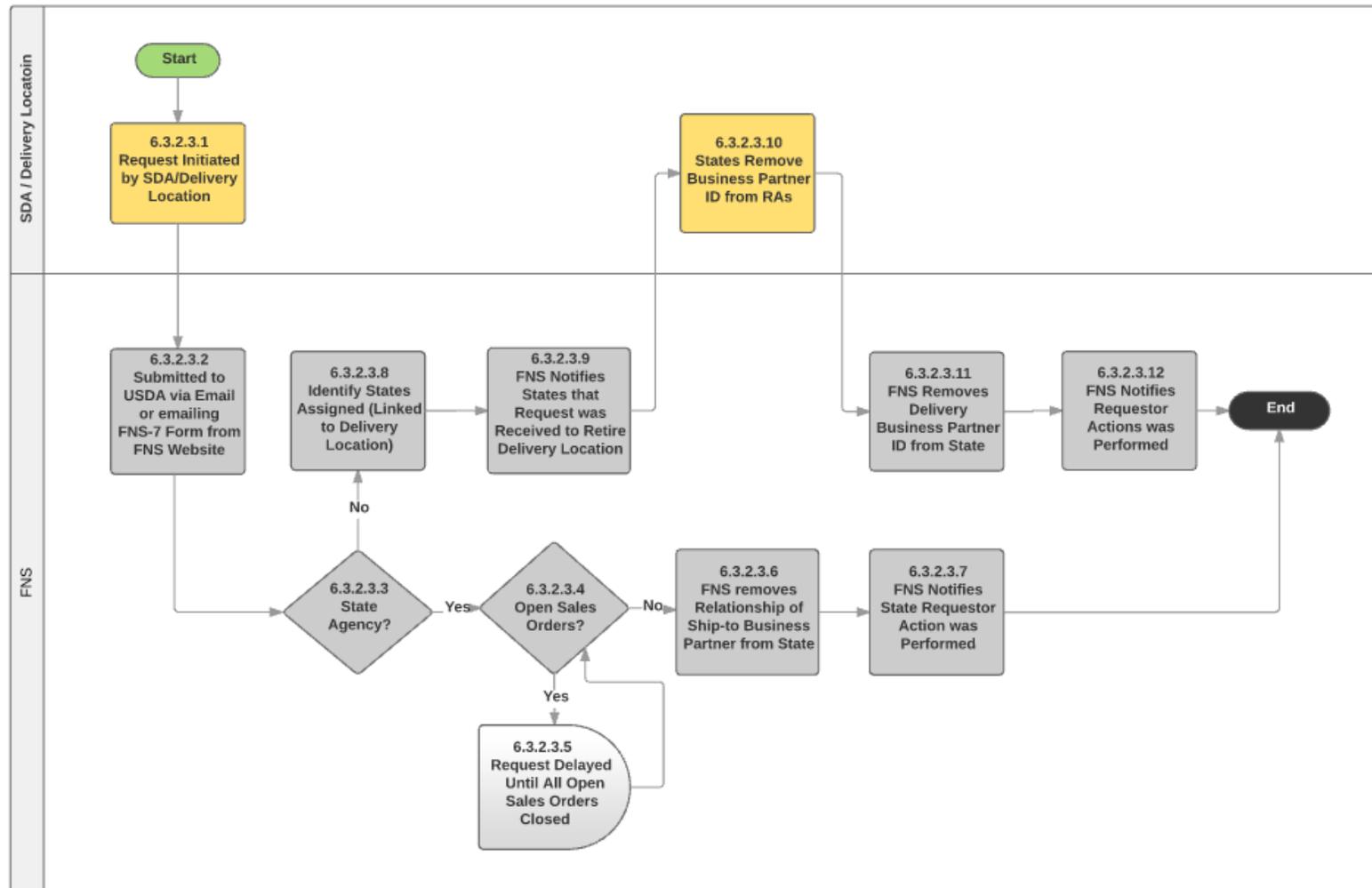
### 6.3.2.2.13 Notify Requestor that Location Not Authorized

- If the location is not verified, then a notification is sent to the requestor stating that the request is not authorized.

### 6.3.2.3 Retire Customers

#### 6.3.2.3 MASTER DATA MANAGEMENT - RETIRE CUSTOMERS

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## Enterprise Data Management As-Is Process Flows and Narratives

### 6.3.2.3.1 Request Initiated by SDA/Delivery Location

- The request to retire customers is initiated by the SDA or Delivery location.

### 6.3.2.3.2 Submitted to USDA via Email or emailing FNS-7 Form from FNS Website

- The SDA or Delivery Location submits an email or completes and emails and FNS-7 form to the appropriate FNS contact.

### 6.3.2.3.3 State Agency?

- FNS determines whether the customer is a State Agency.

### 6.3.2.3.4 No Open Sales Orders?

- FNS determines whether there are any open sales orders related to the customer. If there are no open sales orders the process moves to step 6.3.2.3.6.

### 6.3.2.3.5 Request Delayed

- If it is determined in Step 6.3.2.3.4 that there are open sales orders then the request is placed on hold until all related orders are closed.

### 6.3.2.3.6 FNS removes Relationship of Ship-to Business Partner from State

- FNS removes the relationship of the Ship-To Business Partner from that State Agency.

### 6.3.2.3.7 FNS Notifies State Requestor

- FNS then notifies the state requestor that the action was performed and the process ends.

### 6.3.2.3.8 Verify States Assigned

- If the request is not from a state agency then FNS identifies which states are assigned to the Delivery Location.

### 6.3.2.3.9 FNS Notifies States that Request was received to retire delivery location

- FNS notifies the states that there is a request in place to retire the delivery location.

### 6.3.2.3.10 State Removes Business Partner from RAs

- The state removes the Business Partner ID from the recipient agencies.

### 6.3.2.3.11 FNS Remove Delivery Business Partner ID from State

- FNS removes the delivery Business Partner ID from State.

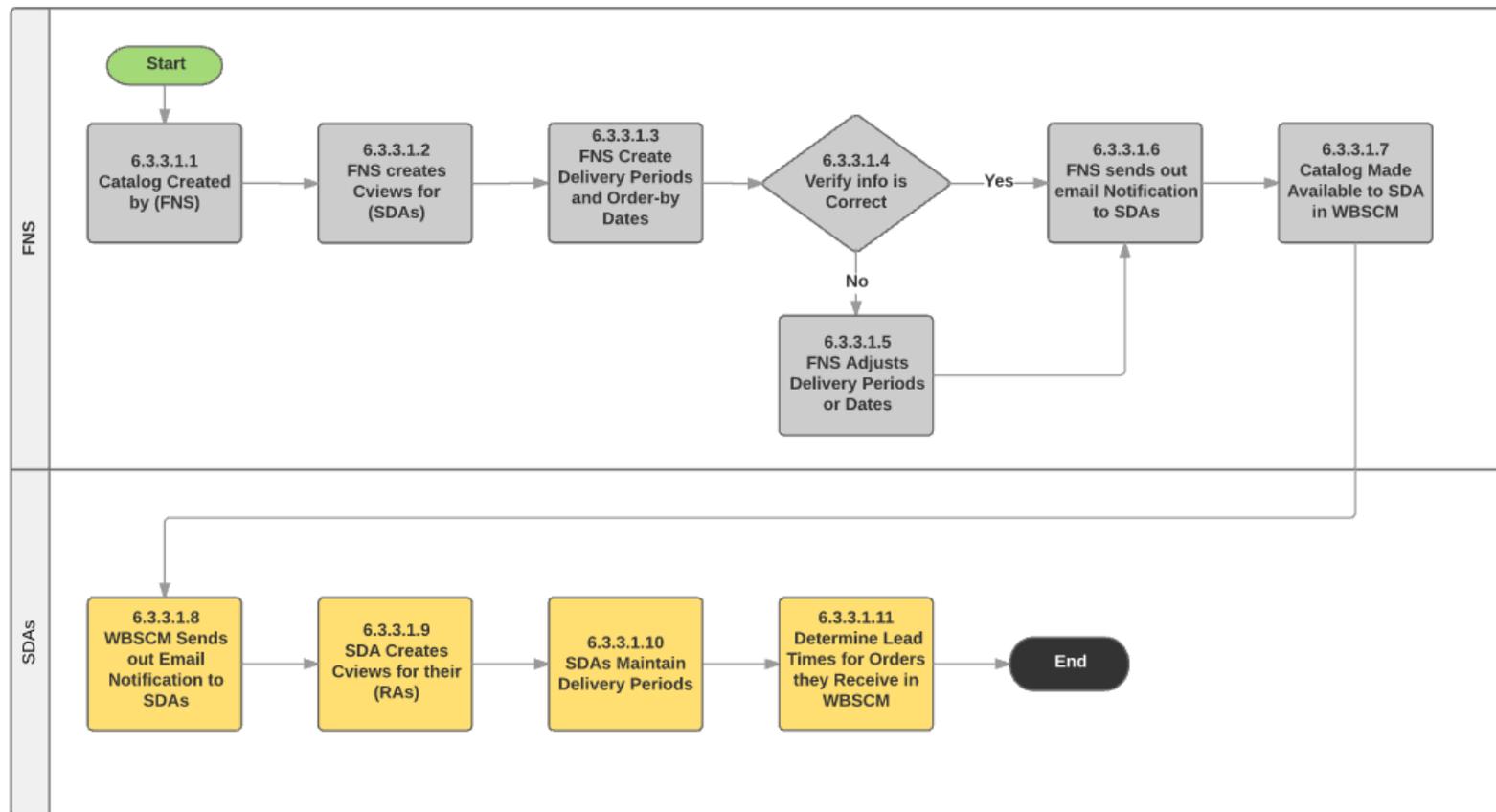
## Enterprise Data Management As-Is Process Flows and Narratives

### 6.3.2.3.12 FNS notifies State Requestor

- FNS notifies the state requestor that the action was performed.

### 6.3.3.1 Create Catalogs

#### 6.3.3.1 MASTER DATA MANAGEMENT - CREATE CATALOGS



#### 6.3.3.1.1 Catalog Created / Modified (FNS)

- The catalog is created by FNS.

## Enterprise Data Management As-Is Process Flows and Narratives

### 6.3.3.1.2 FNS Creates Cviews for the SDA

- FNS creates Cviews for the SDAs

### 6.3.3.1.3 FNS Creates Delivery Periods and Order-by Dates

- FNS creates the delivery periods and order-by dates.

### 6.3.3.1.4 Verifies Delivery Periods and Dates

- FNS verifies whether the delivery periods and dates are correct.

### 6.3.3.1.5 FNS Adjusts Delivery Periods or Dates

- If not correct, FNS adjusts the delivery periods or dates.

### 6.3.3.1.6 FNS sends out Email Notification to SDAs

- FNS provides an email notification to the SDAs that a new catalog has been created.

### 6.3.3.1.7 Catalog Made Available to SDA in WBSCM

- The catalog is made available in WBSCM.

### 6.3.3.1.8 WBSCM Sends out Email Notification to SDAs

- WBSCM send an automated notification to the SDAs

### 6.3.3.1.9 SDA creates Cviews for their (RAs)

- The SDA creates Cviews for their recipient agencies

### 6.3.3.1.10 SDAs Maintain Delivery Periods

- The SDAs maintain delivery periods. SDAs can leave the delivery periods as is or select the delivery periods for their RAs.

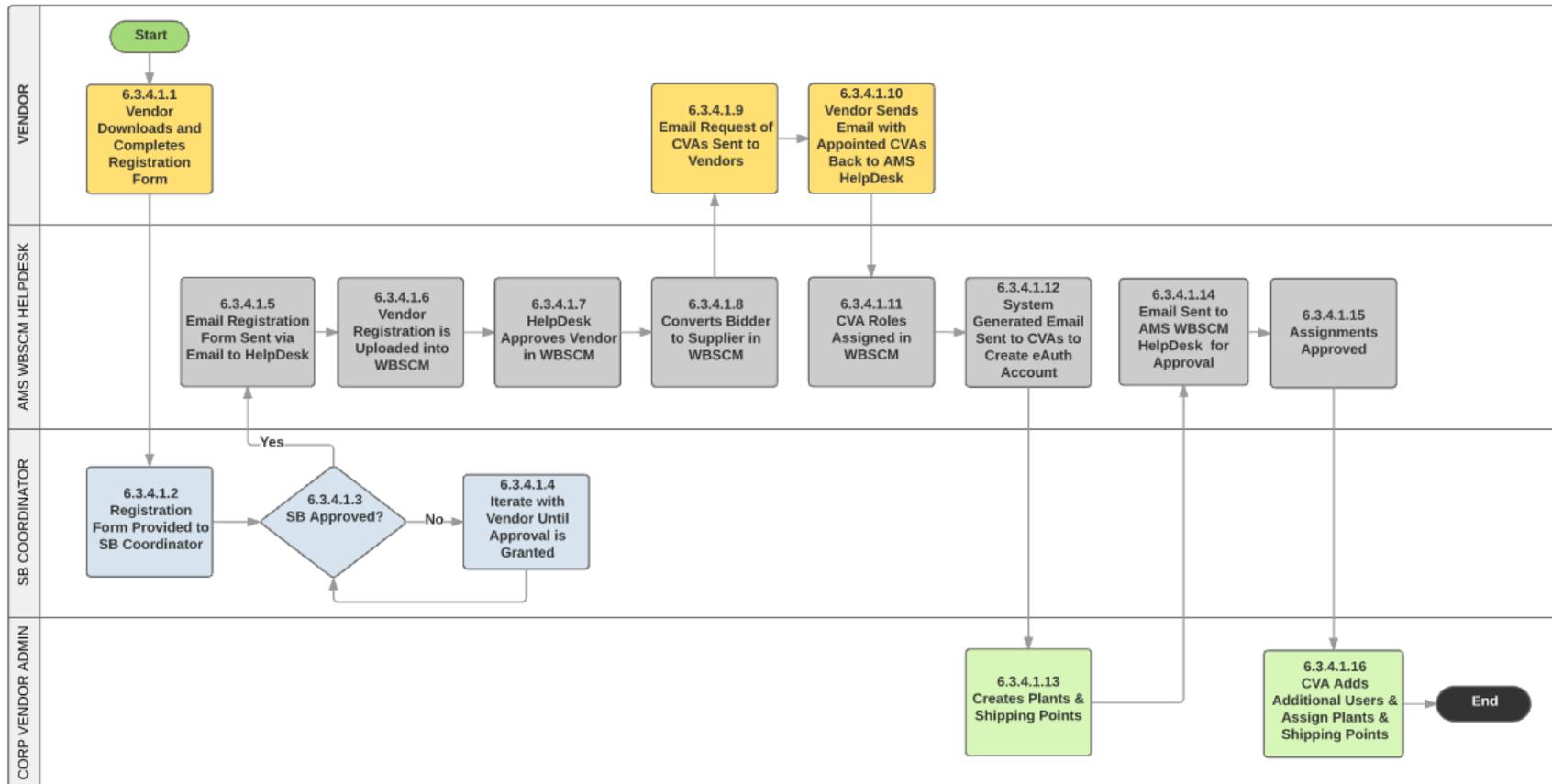
### 6.3.3.1.11 Determine Lead Times for Orders in WBSCM

- SDAs determine the lead times for orders they receive in WBSCM.

## 6.3.4.1 Vendor Registration

### 6.3.4.1 MASTER DATA MANAGEMENT - VENDOR REGISTRATION

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#### 6.3.4.1.1 Vendor Downloads and Completes Registration Form

- This process is initiated by the vendor. The Vendor downloads and completes the [vendor registration form](#) available publically on the AMS website.

## Enterprise Data Management As-Is Process Flows and Narratives

### 6.3.4.1.2 Registration Form Provided to SB Coordinator

- The completed registration form is provided to the SB coordinator.

### 6.3.4.1.3 SB/Contracting Officer Approved?

- The SB coordinator determines approval of the registration. Note that in Kansas City the Contracting Officer would have the final say regarding approval or rejection.

### 6.3.4.1.4 Iterate with Vendor Until Approval is Granted

- If not approved, the SB Coordinator will iterate with the Vendor until approval is granted.

### 6.3.4.1.5 Email Registration Form Sent via Email to Help Desk

- Once approved, the SB Coordinator sends the AMS WBSCM Help Desk the registration form via email.

### 6.3.4.1.6 Vendor Registration is Uploaded into WBSCM

- The AMS WBSCM Help Desk uploads the vendor registration details into WBSCM.

### 6.3.4.1.7 Help Desk/Contracting Officer Approves Vendor in WBSCM

- The AMS WBSCM Help Desk grants approval of the vendor in WBSCM. Note that in Kansas City the Contracting Officer approves the vendor in WBSCM.

### 6.3.4.1.8 Converts Bidder to Supplier in WBSCM

- The AMS WBSCM Help Desk converts the bidder to a supplier in WBSCM which makes the vendor status “active”.

### 6.3.4.1.9 Email Request of CVAs Sent to Vendors

- An email request is sent from the AMS Help Desk to the vendor requesting the names and details of their Corporate Vendor Administrators (CVAs).

### 6.3.4.1.10 Vendor Sends an Email with their Appointed CVAs

- The vendor sends the AMS Help Desk the details regarding their appointed CVAs.

### 6.3.4.1.11 CVA Roles Assigned in WBSCM

- The CVA roles are then assigned in WBSCM by the AMS WBSCM Help Desk.

## Enterprise Data Management As-Is Process Flows and Narratives

### 6.3.4.1.12 System Generated Email Sent to CVAs to create eAuth Account

- Once assigned, a system generated email is sent to the CVAs for creation of their eAuth account.

### 6.3.4.1.13 Creates Plants & Shipping Points

- The CVA creates plants and shipping points for the vendor.

### 6.3.4.1.14 Email Sent to AMS WBSCM Help Desk for Approval

- An email is sent to the AMS Help Desk for approval.

### 6.3.4.1.15 Assignments Approved

- The assignments are approved by the AMS WBSCM Help Desk. Note that in Kansas City the Contracting Officer approves the vendor plants in WBSCM.

### 6.3.4.1.16 CVA Adds Additional Users & Assigns Plants & Shipping Points

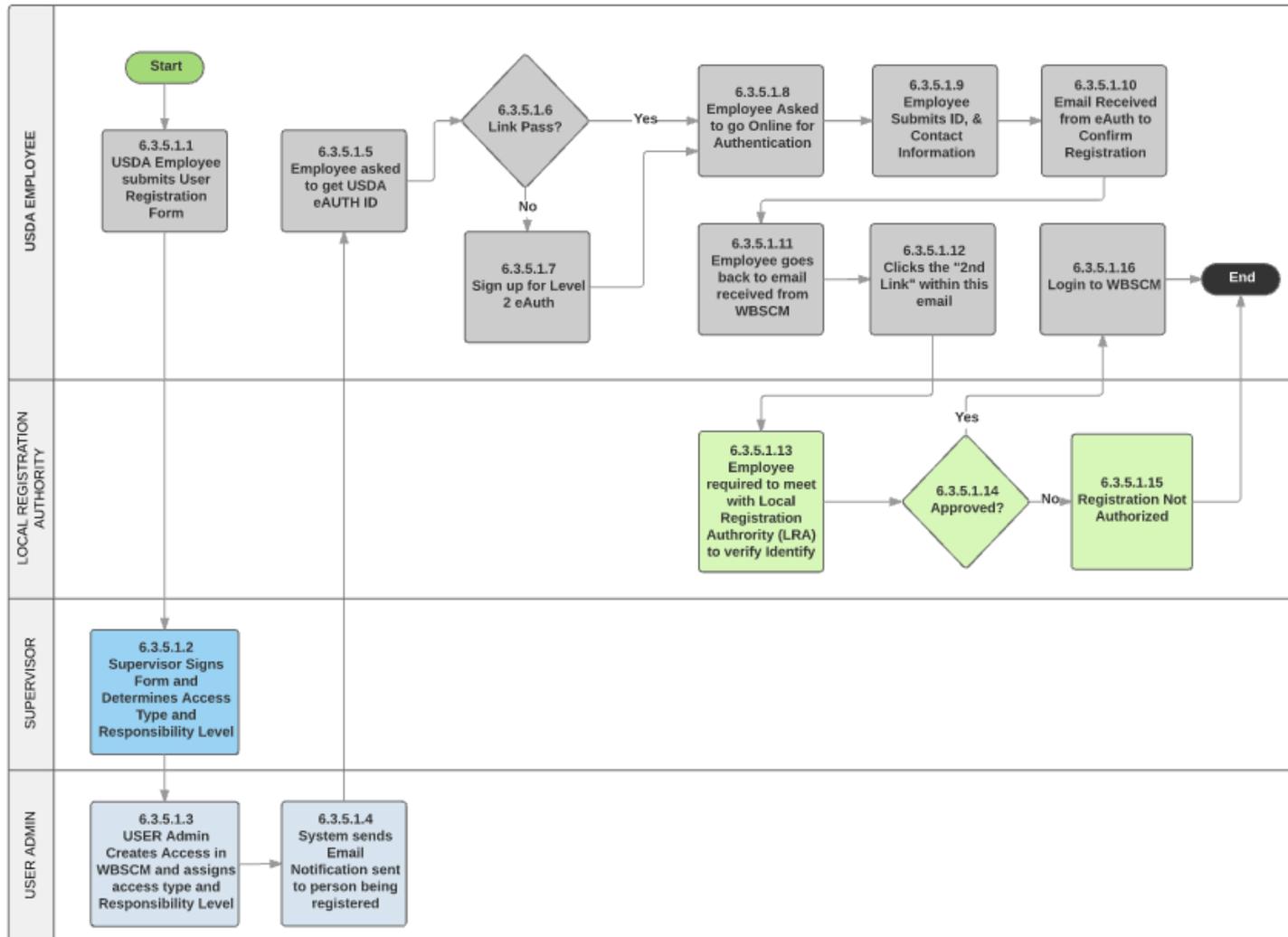
- The CVA adds any additional users and assigns plants and shipping points.

### 6.3.5.1 WBSCM Enrollment (Internal User)

# Enterprise Data Management As-Is Process Flows and Narratives

## 6.3.5.1 MASTER DATA MANAGEMENT - WBSCM ENROLLMENT (INTERNAL)

BMI Domestic Team | May 4, 2016



**Note:** The following process flow details the steps required to add a user to an already established organization.

## Enterprise Data Management As-Is Process Flows and Narratives

### 6.3.5.1.1 USDA Employee submits User Registration Form

- The USDA employee fills out the user registration form and provides it to their supervisor.

### 6.3.5.1.2 Supervisor Signs Form and Determines Access Type and Level

- The supervisor signs the form and determines the access type and responsibility level.

### 6.3.5.1.3 User Admin Creates Access in WBSCM and assigns access type and Level

- The user admin creates access in WBSCM and assigns the access type and responsibility level to the employee's profile.

### 6.3.5.1.4 System sends Email Notification

- The system generates an email notification sent to the person being registered.

### 6.3.5.1.5 Employee asked to get USDA eAuth ID

- The employee is asked to obtain the USDA eAuth ID.

### 6.3.5.1.6 Link Pass?

- Link Pass determination

### 6.3.5.1.7 Sign up for Level 2

- If no Link Pass exists the employee is required to sign up for Level 2 eAuth.

### 6.3.5.1.8 Online Authentication

- Employee is required to go online for Authentication.

### 6.3.5.1.9 Employee submits ID, contact information

- The employee submits their ID and contact information online.

### 6.3.5.1.10 Email received from eAuth to confirm registration

- An electronic authorization email is sent to confirm user registration.

### 6.3.5.1.11 Employee goes back to email received from WBSCM

- The employee is then required to go back to the email originally provided WBSCM (in step 6.3.5.1.4).

## Enterprise Data Management As-Is Process Flows and Narratives

### 6.3.5.1.12 Clicking the "2nd Link" within this email (Makes WBSCM recognize eAuth)

- The employee is required to click the 2<sup>nd</sup> link provided within the email.
- **Pain Points:** The most common issues with registration are:
  - The process of requiring the user to go back and search a previously provided email and click a different link on the same registration is cumbersome and often causes the new user to select the wrong link in the WBSCM registration email.
  - After creating and activating the new account, the user often fails to return to the Registration email that they received from WBSCM User Registration and click the link in step two in order to complete the registration process.
  - If the new user does not select ACTIVATE MY ACCOUNT in the eAuth email within 7 days of the creation of the eAuthentication account the user has to start the eAuth registration all over again.
  - The last name or email address in eAuthentication is different from what is in WBSCM.
  - Registration emails that are sent to users when their WBSCM profile is created are for that specific user only and SHOULD NOT BE SHARED. If a user tries to register using another person's registration it will not work.
  - With the LRA process that is required for internal users, an in-person appointment is required. This leaves open the opportunity for missed appointments. With the LRA process, there is also an online course that's required that is difficult to locate online via "AgLearn".

### 6.3.5.1.13 Employee Meets with Local Registration Authority (LRA)

- The employee is required to meet with the Local Registration Authority (LRA) to verify their identity.

### 6.3.5.1.14 Approved?

- The LRA determines approval.

### 6.3.5.1.15 Registration Not Authorized

- If employee registration is not authorized the process ends.

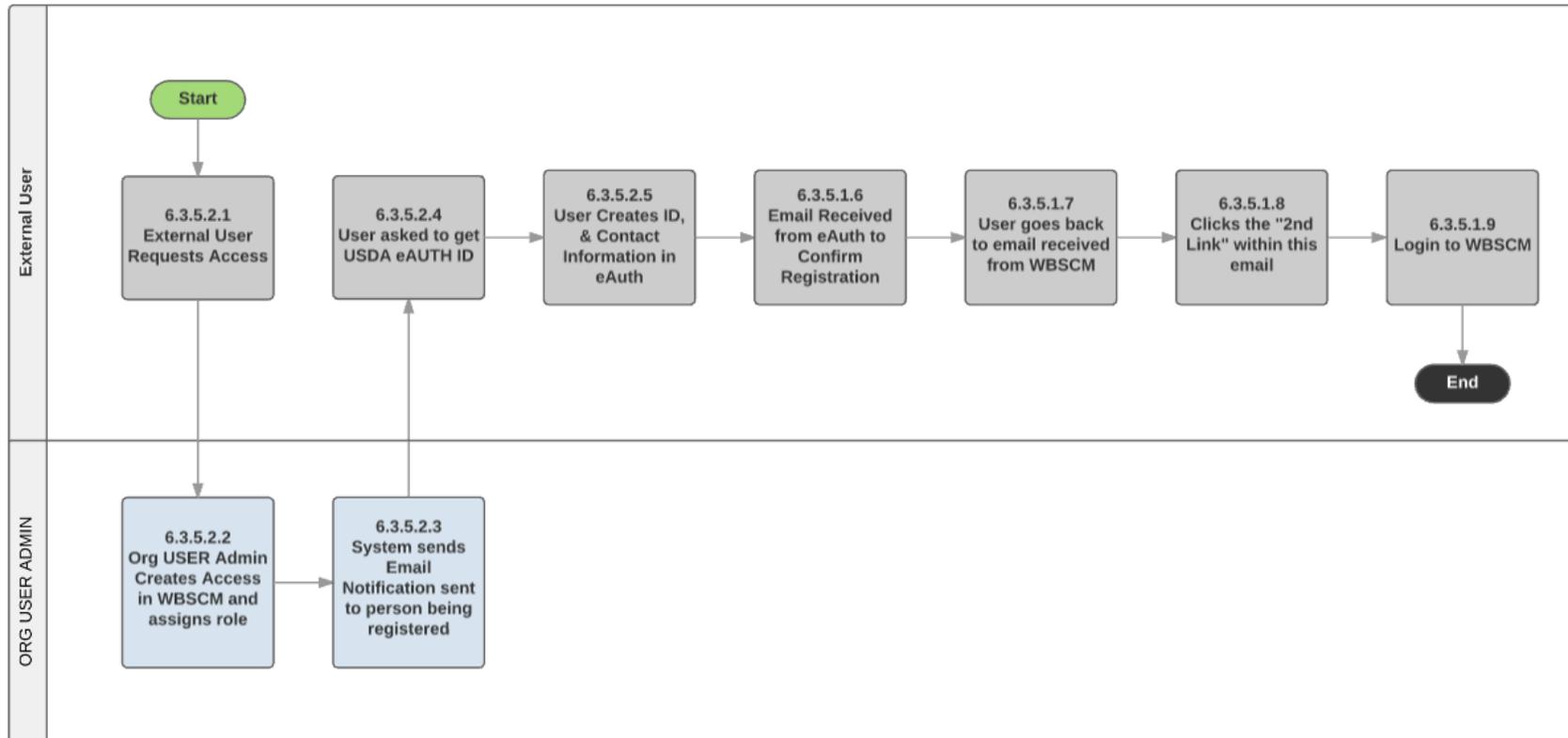
### 6.3.5.1.16 Login to WBSCM

- Once authorized, the employee is able to login to WBSCM.

### 6.3.5.2 WBSCM Enrollment (External User)

#### 6.3.5.2 MASTER DATA MANAGEMENT - WBSCM ENROLLMENT (EXTERNAL)

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**Note:** The following process flow details the steps required to add a user to an already established organization.

#### 6.3.5.2.1 External User Requests Access

- The external user requests access to WBSCM.

#### 6.3.5.2.2 User Admin Creates Access

## Enterprise Data Management As-Is Process Flows and Narratives

- The user administrator creates access for the user in WBSCM and assigns the appropriate role for that user. (As mentioned in the note above, this process assumes the organization and Org Admin have already been established.)

### 6.3.5.2.3 System Sends Email Notification

- The system sends an email notification to the person being registered.

### 6.3.5.2.4 User Asked to obtain eAuth

- The user is prompted to obtain eAuthentication.

### 6.3.5.2.5 User submits ID, contact information

- The employee submits their ID and contact information online in eAuth.

### 6.3.5.2.6 Email Received from eAuth

- The email is received from eAuth to confirm registration.

### 6.3.5.2.7 User returns to Email Previously Received

- The user is required to go back to the email originally provided WBSCM (in step 6.3.5.2.3).

### 6.3.5.2.8 External User Requests Access

- The user is required to click the "2nd Link" within this email which makes WBSCM recognize the user's authorization.

### 6.3.5.2.9 Login to WBSCM

- Once authorized, the user is able to login to WBSCM.