



## PROCESS OVERVIEW

### Purpose

State Distributing Agency (SDA) and Indian Tribal Organization (ITO) Organizational Administrators (Org Admins) use this procedure to create and maintain catalogs for their Recipient Agencies (RAs) and Co-ops to allow ordering commodities from the Domestic Order Entry application. Maintenance includes updating the view, as well as assigning/unassigning RAs and Co-ops from catalogs. This work instruction applies to all USDA Domestic programs, although steps and graphics may refer to specific examples. Where applicable, navigation guides and related notes indicate which steps apply for different types of catalog items, including Multi-Food, Direct Delivery, and Processing Diversion.

The procedure to create and maintain an RA catalog view includes the following key steps:

- Create and name new catalog (if applicable)
- Update existing catalog
  - Add/remove commodities on a list of available products in catalog (**View**)
  - Assign/unassign RAs and Co-ops who may access the catalog through Domestic Order Entry (**Organization**)
  - Save catalog updates
  - Delete an RA catalog
- For Direct Delivery and Processing Diversion items, the SDA/ITO will also need to set or update available ordering and delivery dates. See related training material, [Maintain Direct-Ship Delivery Periods](#) for instructions.

### Process Trigger

SDA/ITO Org Admins perform this procedure when they need to create or maintain a catalog to support ordering by the assigned RA and Co-ops. This may be triggered by internal decisions or external factors such as a notification from FNS that the master catalog for a program has been modified.

### Prerequisites

- SDA Org Admin must have a program assigned by FNS.
- SDA must be linked to RA/Co-op as a sponsoring agency. Refer to the training documents, [Create Recipient Agency \(RA\)](#), [Maintain Recipient Agency \(RA\)](#) and [Create Co-op Organization](#).

### Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab → **Order Processing** tab → **Catalog Maintenance** folder → **Manage RA Catalog Views** link to go to the *Manage RA Catalog Views* screen.

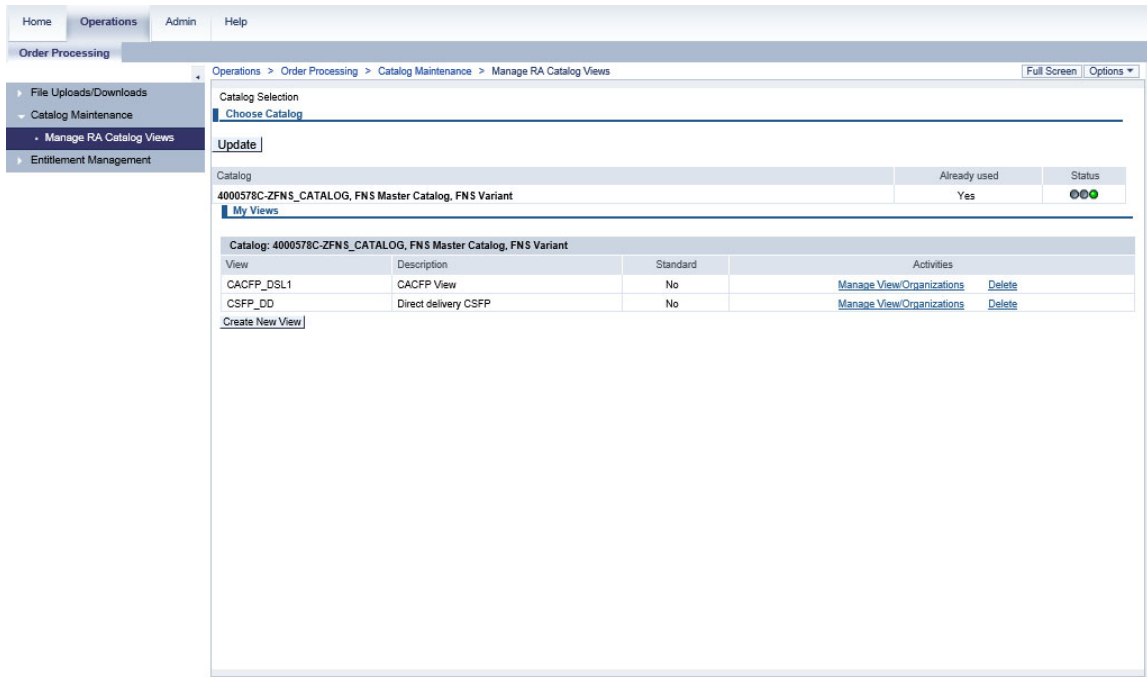
### Tips and Tricks


- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
  - **Required (R)** – a mandatory field necessary to complete the transaction
  - **Optional (O)** – a non-mandatory field not required to complete the transaction
  - **Conditional (C)** – a field that may be required if certain conditions are met, typically linked to completion of a mandatory field
- Refer to the WBSCM Help site, Frequently Referenced Training Materials section for basic navigation training and tips on creating favorites, performing searches, etc.

**PROCEDURE**

1. Start the transaction using the following Portal path: **Operations** tab → **Order Processing** tab → **Catalog Maintenance** folder → **Manage RA Catalog Views** link.

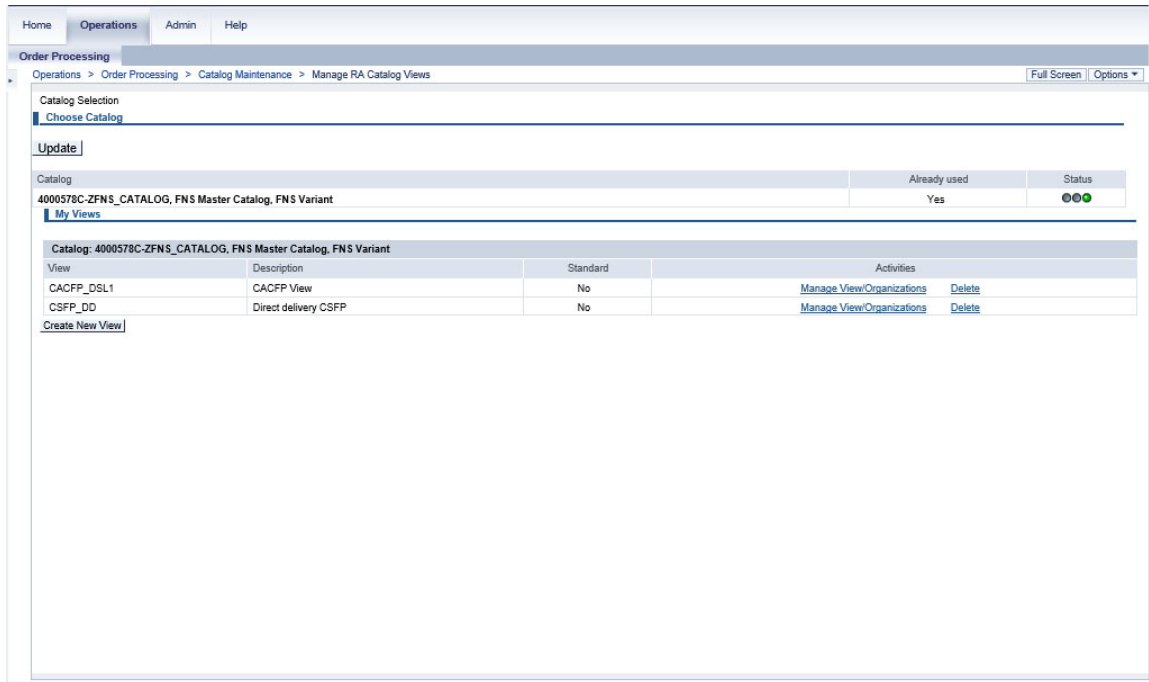
**Image: Manage RA Catalog Views Screen**



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

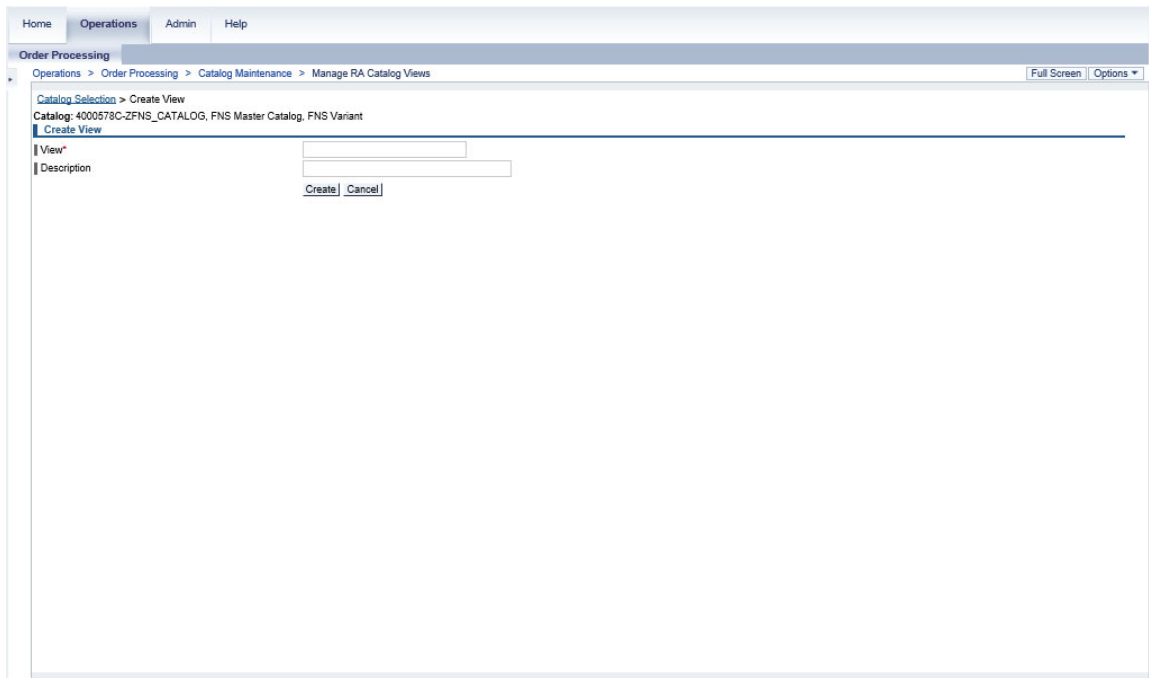
<b>If</b>	<b>Then</b>
The user wants to create a new RA catalog	Go to Step 4.
The user wants to update an existing RA catalog	Go to Step 10.
The user wants to delete an existing RA catalog	Select <a href="#">Delete</a> (the <b>Delete</b> button). The catalog is immediately deleted.

**Image: Manage RA Catalog Views Screen**



4. To create a new RA catalog, click [Create New View](#) (the **Create New View** button).

**Image: Manage RA Catalog Views Screen**

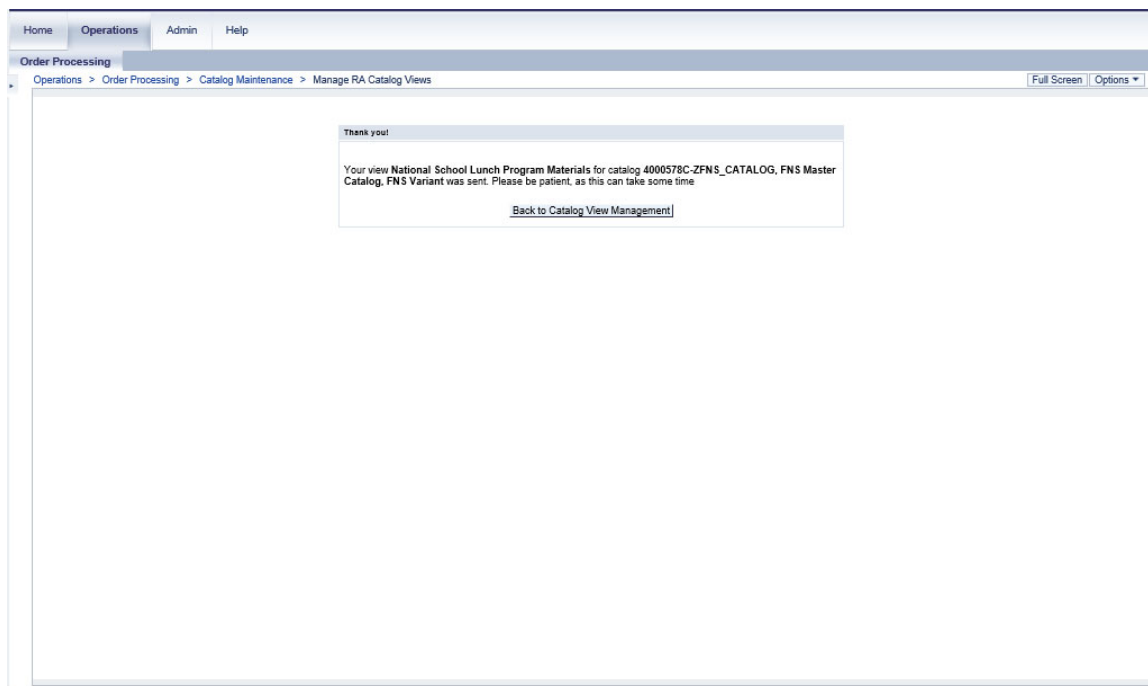


5. As required, complete/review the following fields:

Field	R/O/C	Description
View*	R	The name given to the catalog view being created.  <b>Example:</b> NSLP Materials
Description	O	Text to identify and characterize an object or activity.  <b>Example:</b> National School Lunch Program Materials

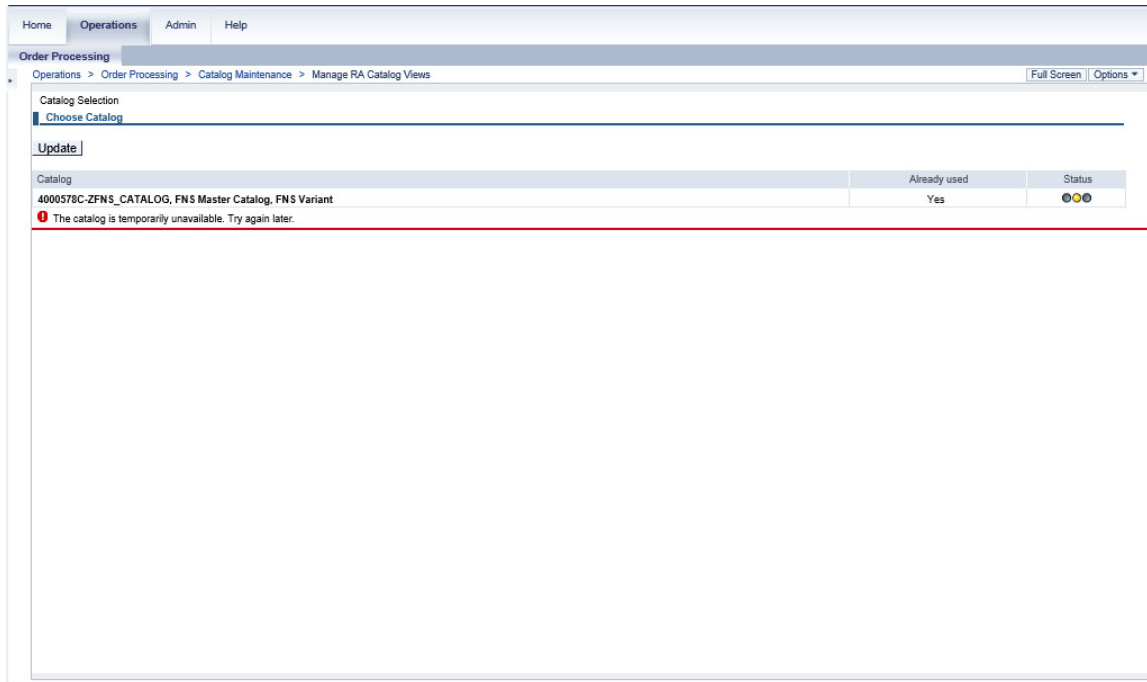
6. Click [Create](#) (the **Create** button) to create the new view.

**Image: Manage RA Catalog Views Screen**



7. Click [Back to Catalog View Management](#) (the **Back to Catalog View Management** button) to return to the catalog selection screen.

**Image: Manage RA Catalog Views Screen**



8. Click **Update** (the **Update** button) after the waiting period to refresh the list of available RA catalog views. In this example, a new catalog view called National School Lunch Program Materials was created to which the user can add commodities for an RA to view and order.

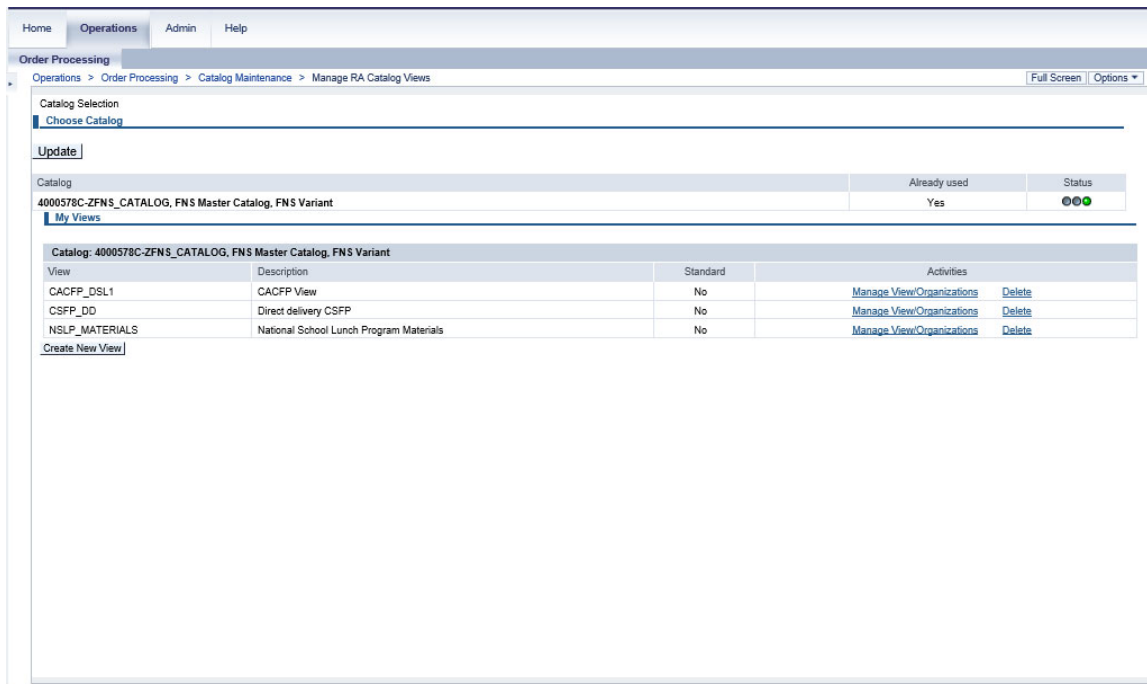


(Note) The waiting period is approximately 2-3 minutes. When the catalog has successfully updated, the Status light will turn green after **Update** (the **Update** button) is clicked, to indicate it is available to view.

9. Perform one of the following:

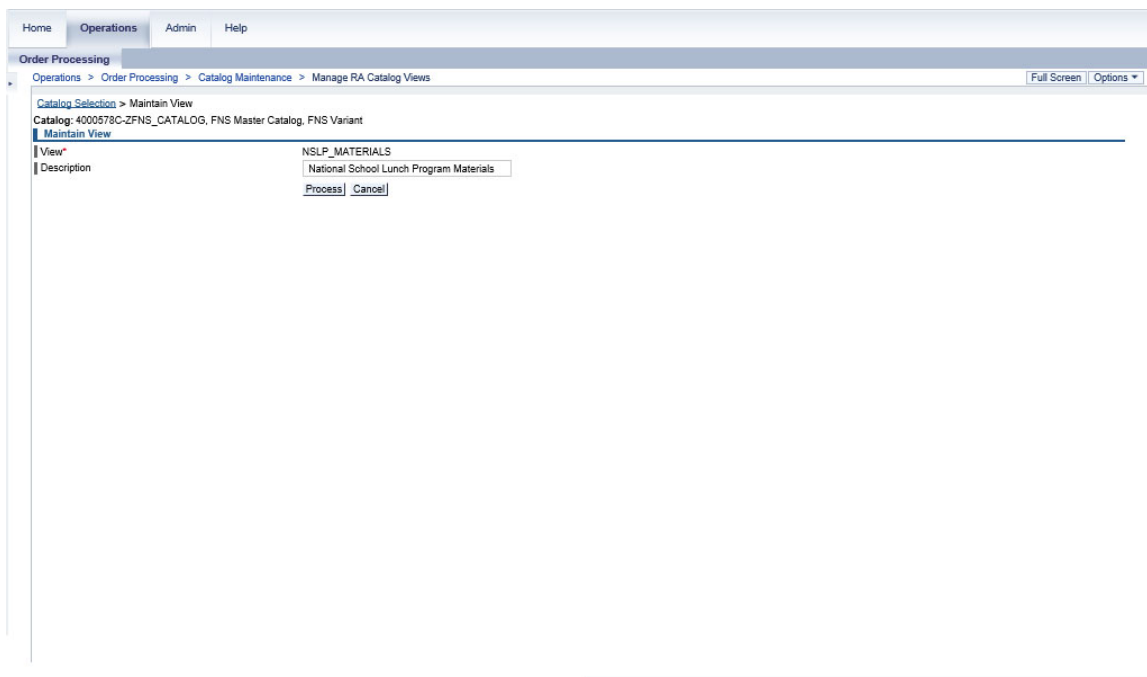
If	Then
The user wants to create another new RA catalog	Go to Step 4.
The user wants to update an existing RA catalog (including newly created)	Go to Step 10.

**Image: Manage RA Catalog Views Screen**




- Click [Manage View/Organizations](#) (the **Manage View/Organizations** link) under the **Activities** column, next to the catalog view to be reviewed and/or updated. In this example, **National School Lunch Program Materials** is selected.

**Image: Manage RA Catalog Views Screen**



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

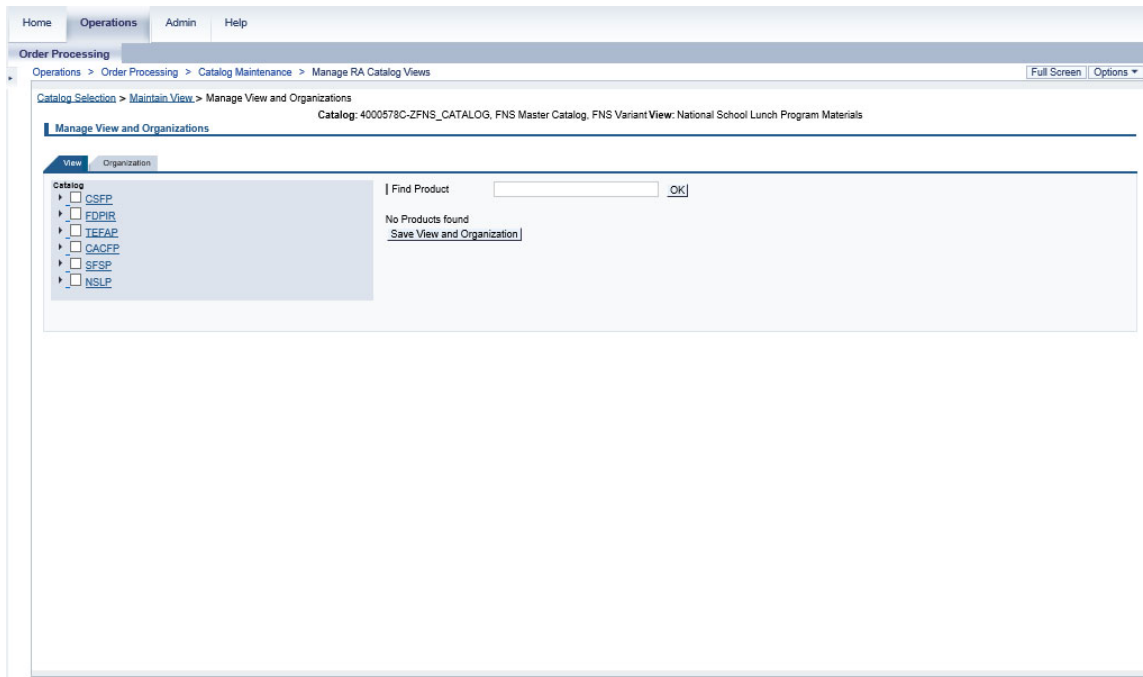
Field	R/O/C	Description
Description	O	Text to identify and characterize an object or activity.  <b>Example:</b> National School Lunch Program Materials   (Note) If needed, the user can change the description of the view by entering new text in this field.

12. Click **Process** (the **Process** button) to open the selected RA catalog view.

13. Perform one of the following:

If	Then
The user wants to update commodities available in this catalog,	Go to Step 14.
The user wants to update RAs/Co-ops assigned to this catalog,	Go to Step 21.

**Image: Manage RA Catalog Views Screen**




14. To add/remove products in the RA catalog view, select the **View** tab if not already active.

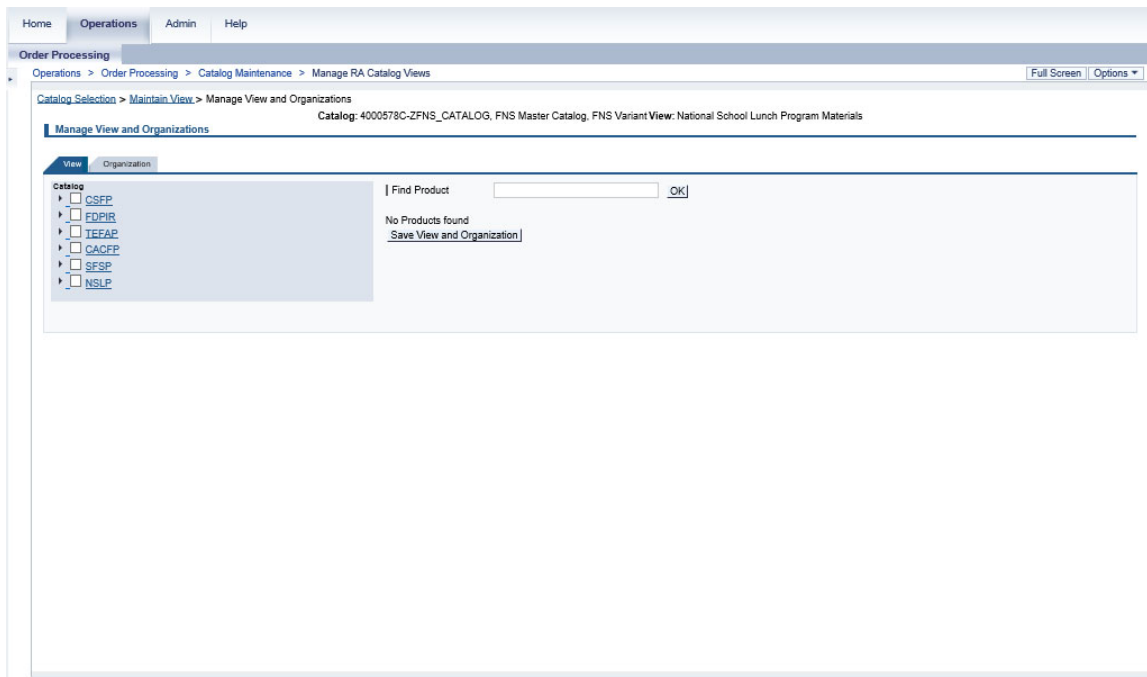


(Note) The user can toggle between the screens for updating the list of materials (**View**) and assigning RAs and Co-ops to a catalog (**Organization**) by clicking on the respective tab.



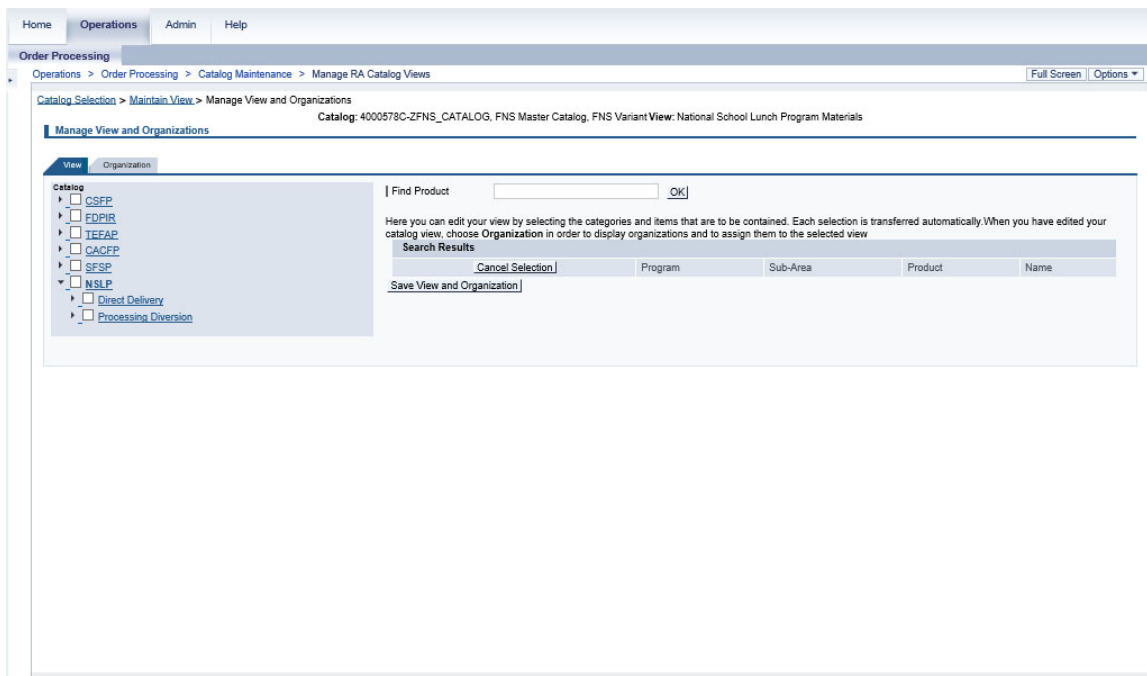
(Note) Clicking  (the **Arrow** button) to the left of the Catalog also opens the catalog.

**Image: Manage RA Catalog Views Screen**







15. Click the link for the desired program to update the materials available in the catalog. In this example, **NSLP** was selected.


**Image: Manage RA Catalog Views Screen**



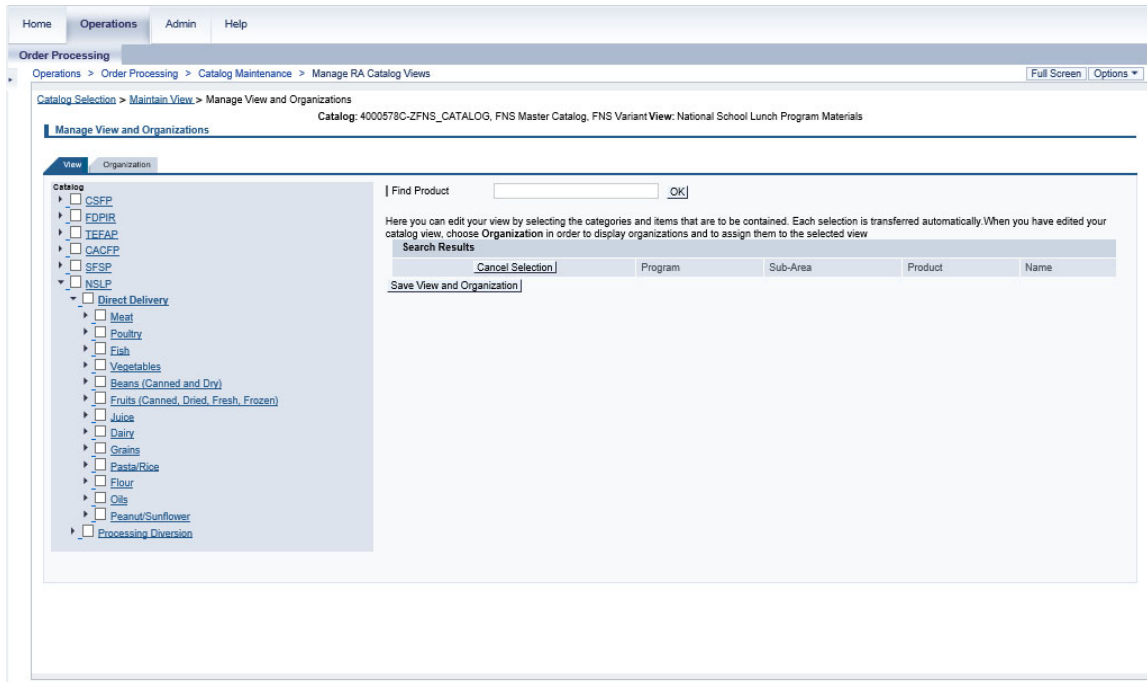


16. Perform one of the following:

If	Then
<p>The user wants to add Direct Delivery commodities to the catalog</p>	<ol style="list-style-type: none"> <li>1. Select <a href="#">Direct Delivery</a> (the <b>Direct Delivery</b> link).</li> <li>2. Go to Step 17.</li> </ol> <p> (Note) <b>Direct Delivery</b> commodities are available for the <b>NSLP, CACFP, SFSP, NSIP, CSFP, FDPIR, and TEFAP</b> programs.</p>
<p>The user wants to add Processing Diversion commodities to the catalog</p>	<ol style="list-style-type: none"> <li>1. Select <a href="#">Processing Diversion</a> (the <b>Processing Diversion</b> link).</li> <li>2. Go to Step 17.</li> </ol> <p> (Note) Processing Diversion commodities are available for the <b>NSLP</b> and <b>CACFP</b> programs.</p>
<p>The user wants to add Multi-Food commodities to the catalog</p>	 <ol style="list-style-type: none"> <li>1. Select <a href="#">Multi-Food</a> (the <b>Multi-Food</b> link)</li> <li>2. Go to Step 17.</li> </ol> <p> (Note) Multi-Food commodities are available for the <b>CSFP</b> and <b>FDPIR</b> programs.</p>

 (Note) Direct Delivery and Processing Diversion items are sourced directly from a vendor, and RA orders undergo review, consolidation, and approval by the SDA/ITO. Multi-Food items are sourced from the assigned National Warehouse, and orders do not require an approval process.

## Image: Manage RA Catalog Views Screen

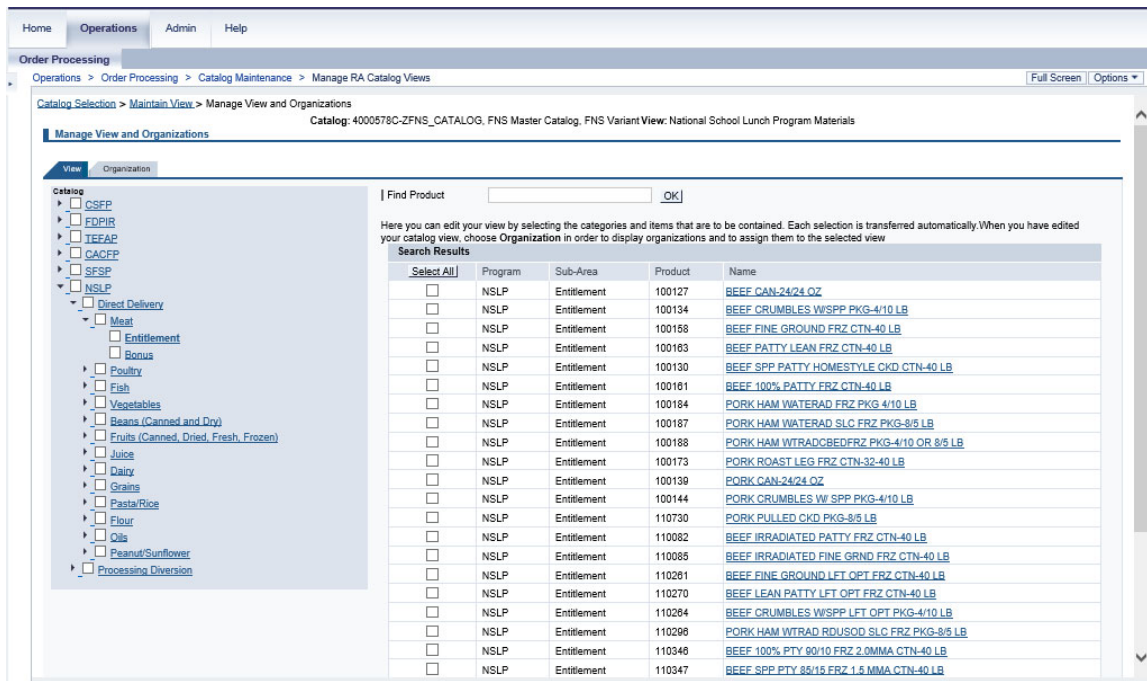


17. Select the corresponding link to view the list of available commodities. For this example, [Meat](#) (the **Meat** link) category is selected.



(Note) Any commodity groups that have commodities already selected for RA ordering will show  (a checked **Checkbox**) to the left of the catalog.

## Image: Manage RA Catalog Views Screen




18. Select the corresponding link for the funding option to view the list of available commodities. For this example, [Entitlement](#) (the **Entitlement** link) category is selected.



(Note) The Entitlement option includes only commodities that can be ordered against the SDA's and RA's entitlement balance. The Bonus option includes only commodities that do not impact entitlement balances when ordered.

19. Perform one of the following:

If	Then
The user wants to select specific commodities from the product list for the catalog view	Select <input type="checkbox"/> (the empty <b>Checkbox</b> ) next to each desired commodity to include in this RA catalog view.
The user wants to select all the commodities from the list for the catalog view	Click <a href="#">Select All</a> (the <b>Select All</b> button).
	 (Note) Always use this option for Multi-Food commodities.
The user wants to de-select specific commodities from the product list for the catalog view	Un-check <input checked="" type="checkbox"/> (the checked <b>Checkbox</b> ) next to each desired commodity to remove from the RA catalog view.
The user wants to de-select all the commodities from the list for the catalog view	Click <a href="#">Cancel Selection</a> (the <b>Cancel Selection</b> button).



(Note) To limit the list to a specific commodity or commodities that match search criteria, enter the commodity number or name into the Find Product field. Then, click **OK** to perform the search.

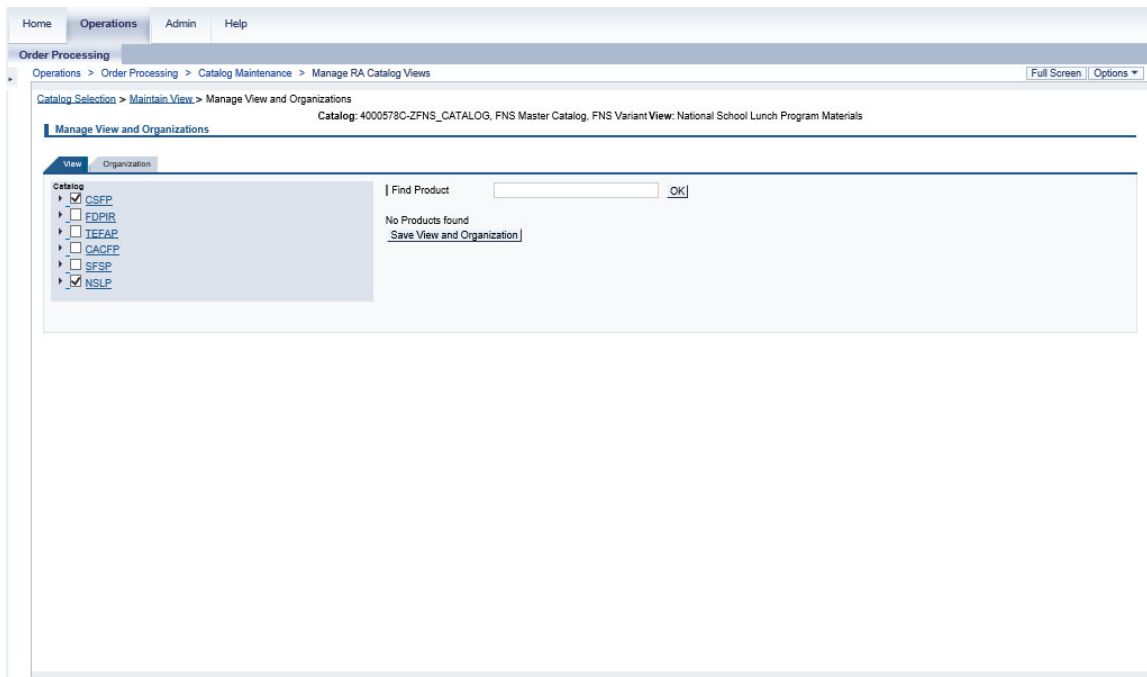


(Note) Although a checkmark is not automatically applied next to the category in the **Catalog** section on the left, selections are saved. The checkmark will appear after either the **Save View and Organization** button is selected or another category is selected.

20. Perform one of the following:

If	Then
The user would like to add other commodities to this catalog view	Go to Step <a href="#">14</a> .
The user would like to update RAs/Co-ops assigned to this catalog view	Go to Step <a href="#">21</a> .
The user would like to save changes to the catalog view	Go to Step <a href="#">27</a> .

**Image: Manage RA Catalog Views Screen**



21. To add/remove organizations assigned to this catalog view, select **Organization** (the **Organization** tab) if not already active.

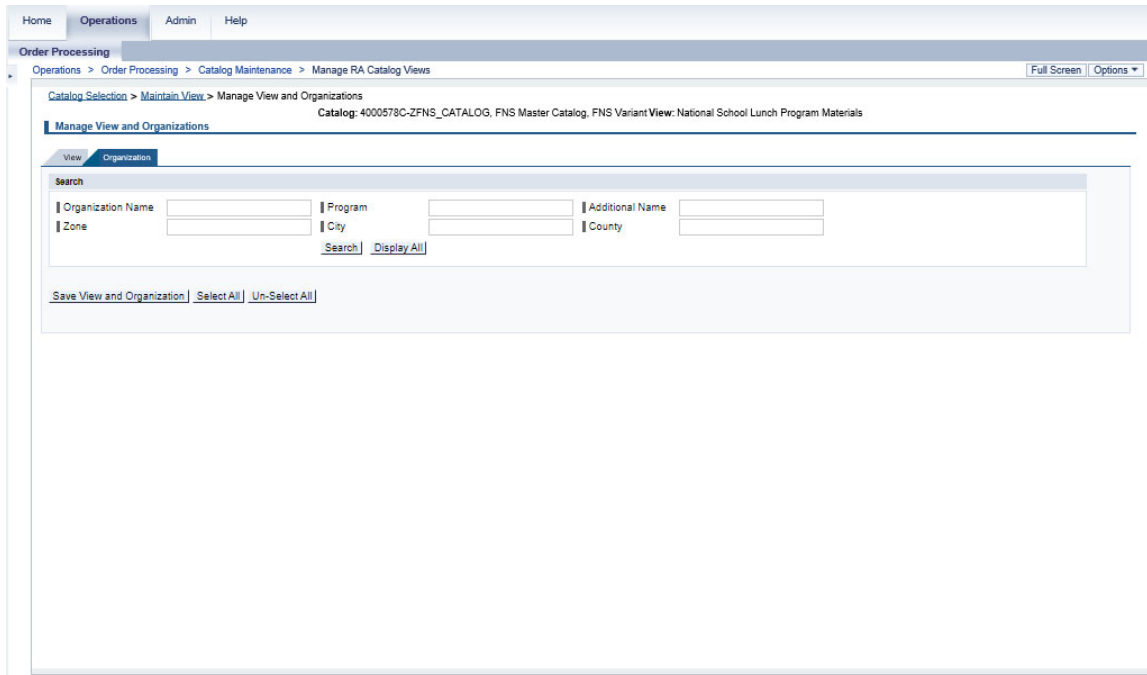


(Note) The user can toggle between the screens for updating the list of materials (**View**) and assigning RAs and Co-ops to a catalog (**Organization**) by clicking on the respective tab.







(Note) Users can perform the search without making any entries in the search fields. To narrow the search results, enter data in one or more of the fields in the *Search* section. In this example, the search fields are left blank.

Image: Manage RA Catalog Views Screen



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

Field	R/O/C	Description
Organization Name	O	<p>The legal name of the approved participating organization in a USDA food program.</p> <p><b>Example:</b> Food Bank</p> <p> (Note) Enter full or partial RA or Co-op <b>Organization Name</b>. Wildcard search is available for this field.</p>
Program	O	<p>Acronym used to identify a USDA food distribution program.</p> <p> (Note) Enter the exact <b>Program</b> name. Wildcard searches are not available for this field.</p>
Additional Name	O	<p>Text to identify additional name.</p> <p> (Note) Enter the full or partial <b>Additional Name</b>. Wildcard is available for this field.</p>
Zone	O	<p>Identifying number assigned to an RA by their SDA.</p> <p> (Note) Enter the exact <b>Zone</b> if known. Wildcard search is available for this field.</p>

Field	R/O/C	Description
City	O	City where the user or company is located.  (Note) Enter the full or partial <b>City</b> or leave the field blank. Wildcard search is available for this field.
County	O	Region or geographical area.  (Note) Enter the full or partial <b>County</b> if known. Wildcard search is available for this field.

23. Perform one of the following:

If	Then
The user has entered search criteria in any of the <i>Search</i> fields	Click <a href="#">Search</a> (the <b>Search</b> button).
The user would like to display all organizations and programs	Click <a href="#">Display All</a> (the <b>Display All</b> button).




(Note) Refer to the [Wildcard and Matchcode Searches Job Aid](#) for advanced search options.

**Image: Manage RA Catalog Views Screen**

The screenshot shows the 'Manage View and Organizations' interface. At the top, there are navigation tabs for Home, Operations, Admin, and Help. Below that, the breadcrumb trail reads: Order Processing > Order Processing > Catalog Maintenance > Manage RA Catalog Views. The main content area has a search section with fields for Organization Name (containing 'Food Bank'), Program, Additional Name, Zone, City, and County. Below the search fields are buttons for 'Search' and 'Display All'. A table below the search section lists various food banks with columns for Assign, Business Partner, Organization Name, Additional Name, Program, Zone, City, and County. The table contains 12 rows of data.

Assign	Business Partner	Organization Name	Additional Name	Program	Zone	City	County
<input type="checkbox"/>	0004001181	Central Texas Food Bank		CACFP CSFP STIM TEFAP	7	Austin	Travis
<input type="checkbox"/>	0004001987	Food Bank of Corpus Christi		CACFP CSFP STIM TEFAP	4	Corpus Christi	Nueces
<input type="checkbox"/>	0004001994	Food Bank of the Rio Grande Valley	TEFAP	CACFP CSFP STIM TEFAP	4	Brownsville	Cameron
<input type="checkbox"/>	0004002423	Houston Food Bank		CACFP CSFP NSLP NSIP STIM SFSP	4	Houston	Harris
<input type="checkbox"/>	0004003287	North Texas Food Bank/Abilene Food Bank		CACFP CSFP STIM TEFAP	4	Abilene	Taylor
<input type="checkbox"/>	0004003884	Regional East Texas Food Bank		CACFP CSFP STIM TEFAP	4	Houston	Harris
<input type="checkbox"/>	0004003944	San Antonio Food Bank		CACFP CSFP STIM TEFAP	4	San Antonio	Bexar
<input type="checkbox"/>	0004004062	South Plains Food Bank/High Plains Food		CACFP CSFP STIM TEFAP	4	El Paso	El Paso
<input type="checkbox"/>	0004004105	Southeast Texas Food Bank/Food Bank		CACFP CSFP STIM TEFAP	5	Orange	Orange
<input type="checkbox"/>	0004004630	Tarrant Area Food Bank/Wichita Falls		CACFP CSFP STIM TEFAP	5	Wichita Falls	Wichita
<input type="checkbox"/>	0004005487	West Texas Food Bank		CACFP CSFP STIM TEFAP	5	Lubbock	Lubbock
<input type="checkbox"/>	0004005942	South Texas Food Bank		CACFP CSFP TEFAP	5	Brownsville	Cameron

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

Field	R/O/C	Description
Business Partner	O	Number or name assigned to SDAs, ITOs, Co-ops, and RAs in WBSCM.
Organization Name	O	The legal name of the approved participating organization in a USDA food program.   (Note) The <b>Organization Name</b> field indicates the RA or Co-op name.
Program	O	Acronym used to identify a USDA food distribution program.
Additional Name	O	Additional text for the organization's name.
Zone	O	Identifying number assigned to an RA by their SDA.
City	O	City where the user or company is located.
County	O	Region or geographical area.

25. Perform one of the following:

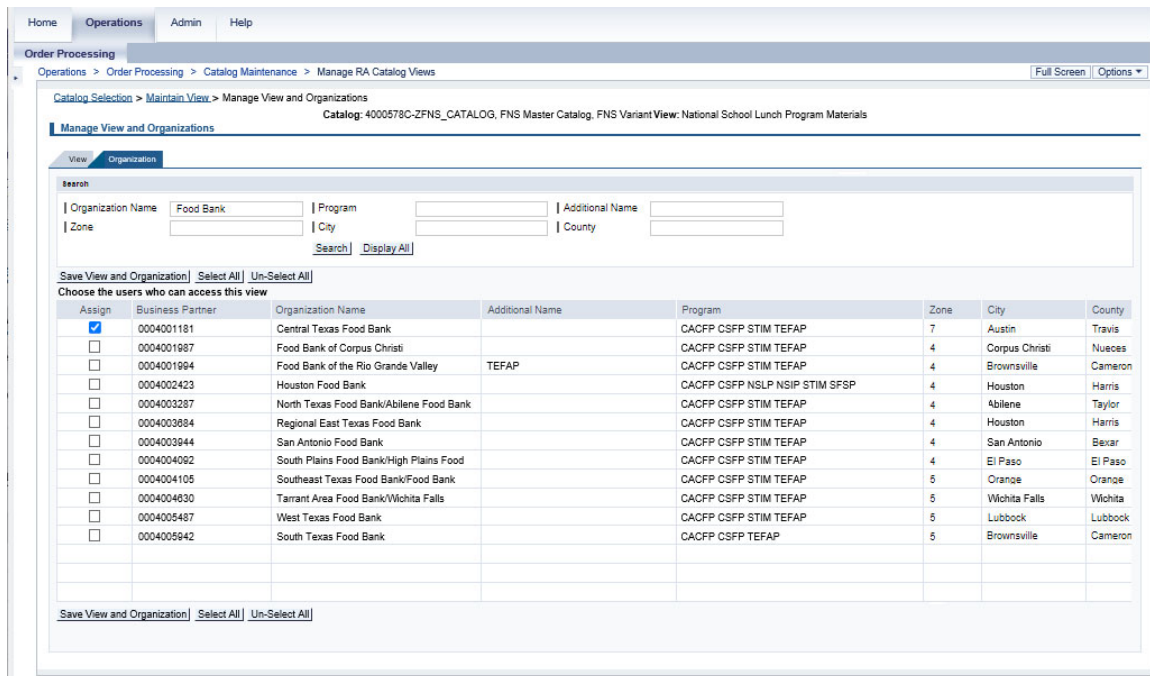
If	Then
The user would like to assign a specific organization from the list to this catalog view	Click <input type="checkbox"/> (the empty <b>Checkbox</b> ) next to each desired organization.
The user would like to assign all the listed organizations to this catalog view	Click <a href="#">Select All</a> (the <b>Select All</b> button).
The user would like to unassign a specific organization from the list from this catalog view	Uncheck <input checked="" type="checkbox"/> (the checked <b>Checkbox</b> ) next to each desired organization.

If	Then
The user would like to unassign all the listed organizations from this catalog view	Click <a href="#">Un-Select All</a> (the <b>Un-Select All</b> button).

26. Perform one of the following:

If	Then
The user would like to add or remove commodities in this catalog view	Go to Step 14.
The user would like to update RAs/Co-ops assigned to this catalog view	Go to Step 21.
The user would like to save changes to this catalog view	Go to Step 27.

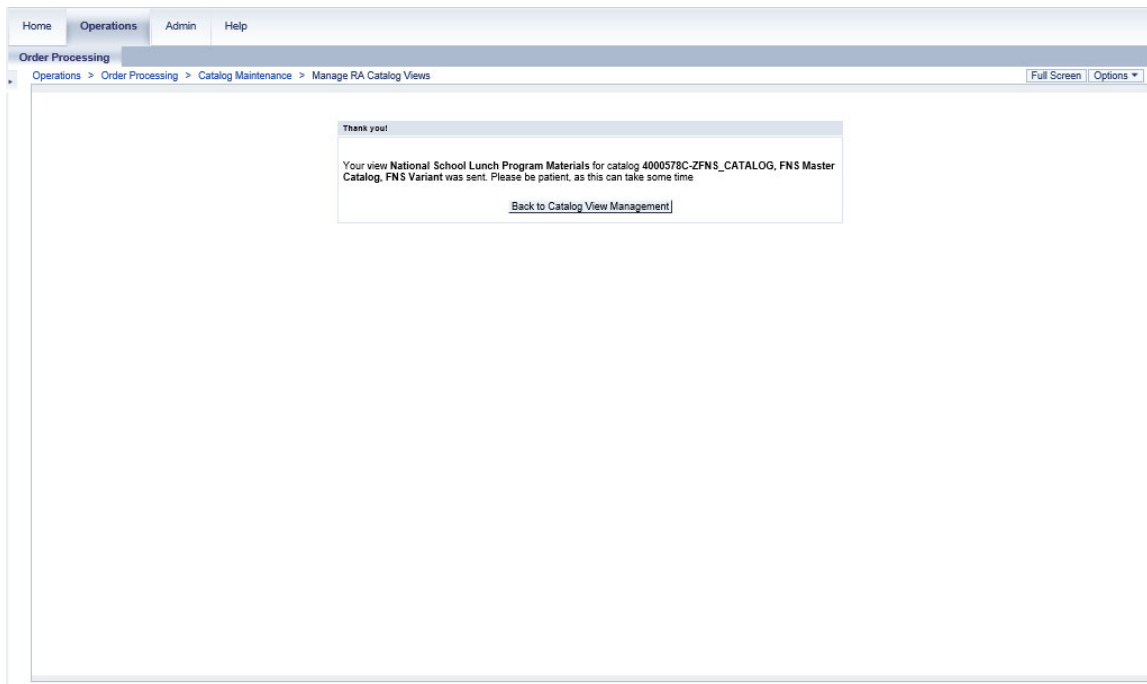
**Image: Manage RA Catalog Views Screen**



27. Click [Save View and Organization](#) (the **Save View and Organization** button) to save any updates.



### Image: Manage RA Catalog Views Screen



28. Click [Back to Catalog View Management](#) (the **Back to Catalog View Management** button) to return to the catalog selection screen.



(Note) Click [Update](#) (the **Update** button) in the Catalog View Management screen to refresh the list of available RA catalogs. The waiting period is approximately 2-3 minutes. When the catalog has successfully updated, the Status light will turn green after [Update](#) (the **Update** button) is clicked again. This will allow the user to release the catalog for other users within the agency.

29. The transaction is complete.



(Note) For RA catalogs that contain Direct Delivery and Process Diversion materials, the next step is to set delivery periods and lead time to allow the SDA/ITO to review and consolidate RA orders. Refer to the [Maintain Ship-To Delivery Dates](#) work instruction.



## RESULT

The user has successfully completed the steps to Manage RA Catalog Views by either creating a new catalog view, or updating the products listed in and/or the organizations assigned to an existing one, or deleting an RA catalog that is no longer needed.



## PROCESS OVERVIEW

### Purpose

When placing an order, a Recipient Agency (RA) must select a delivery period to identify the range of dates when the sales order should be delivered. Each delivery period is associated with an order due date that is set by FNS. To allow additional time for reviewing and consolidating orders, the State Distributing Agency (SDA) or Indian Tribal Organization (ITO) has the option to set additional lead time for each commodity group. RAs must place orders within the specified number of days prior to the date orders are due to FNS. The purpose of this transaction is for SDA/ITO Order Managers to select the delivery periods that will be available to the RAs and to set lead time for each commodity group.

### Process Trigger

A commodity was added to the domestic catalog. An SDA/ITO Order Manager needs to select the delivery periods to be available to RAs for ordering and/or update the lead time for the commodity group.

### Prerequisites

- An RA must exist as a suborganization to the SDA/ITO at the time delivery periods and lead time settings are updated.

### Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab → **Order Processing** tab → **Catalog Maintenance** folder → **Maintain Direct-Ship Delivery Periods** link to go to the *Maintain Direct-Ship Delivery Periods* initial screen.

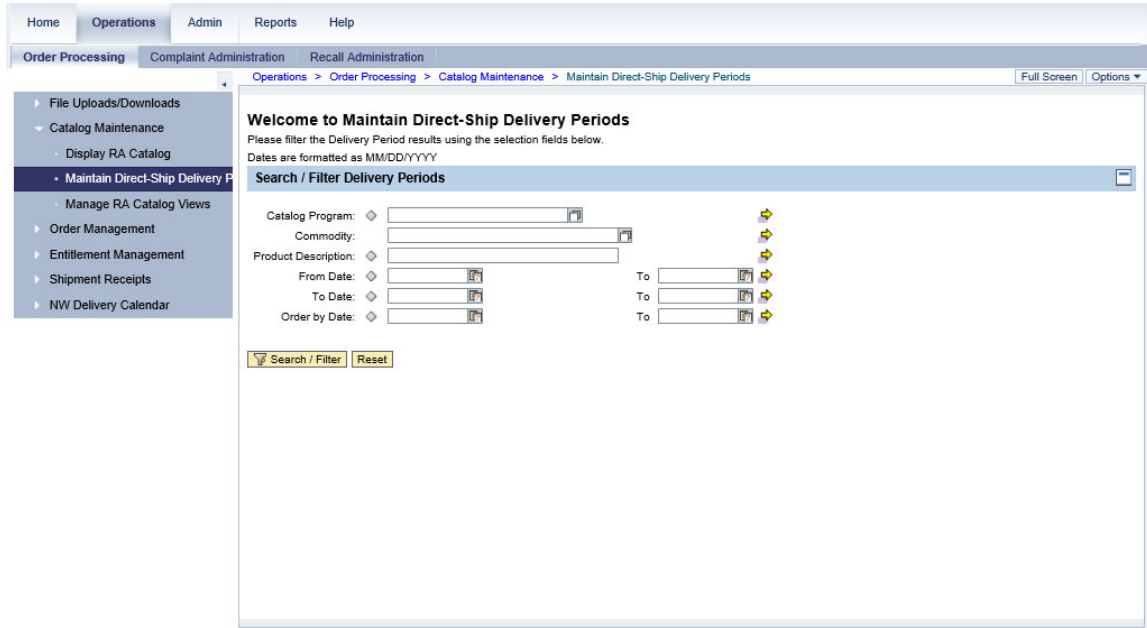
### Tips and Tricks

- The R/O/C acronyms in the fields tables represent Required, Optional, or Conditional field entries.
  - **Required (R)** - a mandatory field necessary to complete the transaction
  - **Optional (O)** - a non-mandatory field not required to complete the transaction
  - **Conditional (C)** - a field that may be required if certain conditions are met, typically linked to completion of a mandatory field
- Refer to the WBSCM Portal Navigation course for tips on creating favorites, performing searches, etc.


## PROCEDURE

1. Start the transaction using the following Portal path: **Operations** tab → **Order Processing** tab → **Catalog Maintenance** folder → **Maintain Direct-Ship Delivery Periods** link.

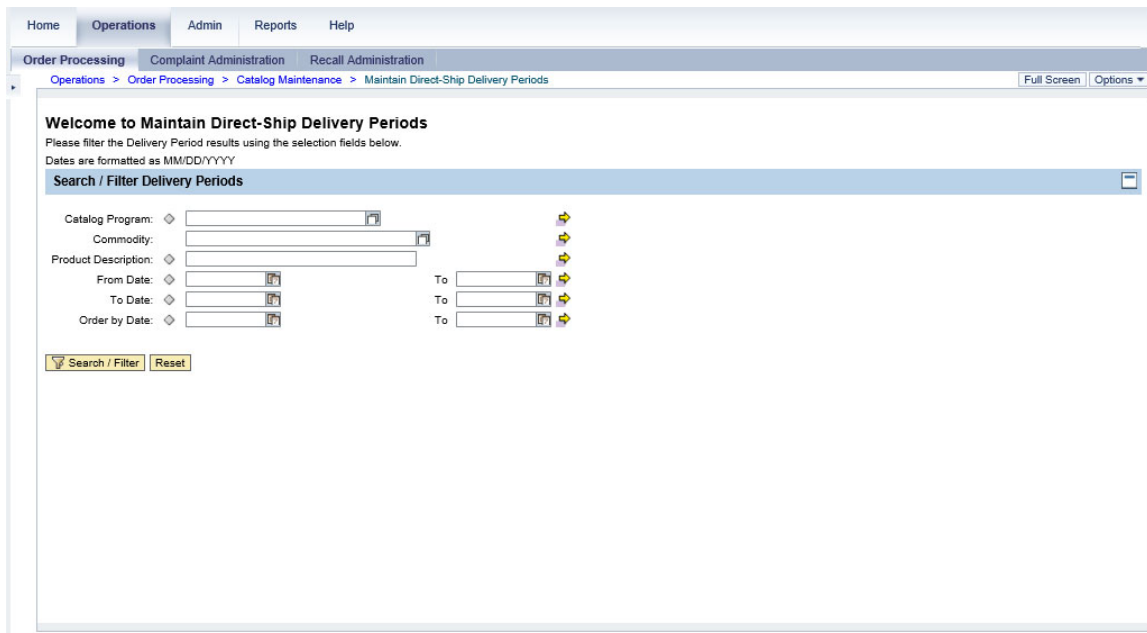
### Image: Maintain Direct-Ship Delivery Periods Screen



The screenshot shows the 'Maintain Direct-Ship Delivery Periods' screen in the WBSCM portal. The navigation menu on the left is expanded, showing options like 'File Uploads/Downloads', 'Catalog Maintenance', 'Display RA Catalog', 'Maintain Direct-Ship Delivery Periods', 'Manage RA Catalog Views', 'Order Management', 'Entitlement Management', 'Shipment Receipts', and 'NW Delivery Calendar'. The main content area displays a 'Welcome to Maintain Direct-Ship Delivery Periods' message and a 'Search / Filter Delivery Periods' section with various input fields for filtering results.




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

### Welcome to Maintain Direct-Ship Delivery Periods



The screenshot shows the 'Maintain Direct-Ship Delivery Periods' screen with the navigation menu minimized. The main content area displays a 'Welcome to Maintain Direct-Ship Delivery Periods' message and a 'Search / Filter Delivery Periods' section with various input fields for filtering results.

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

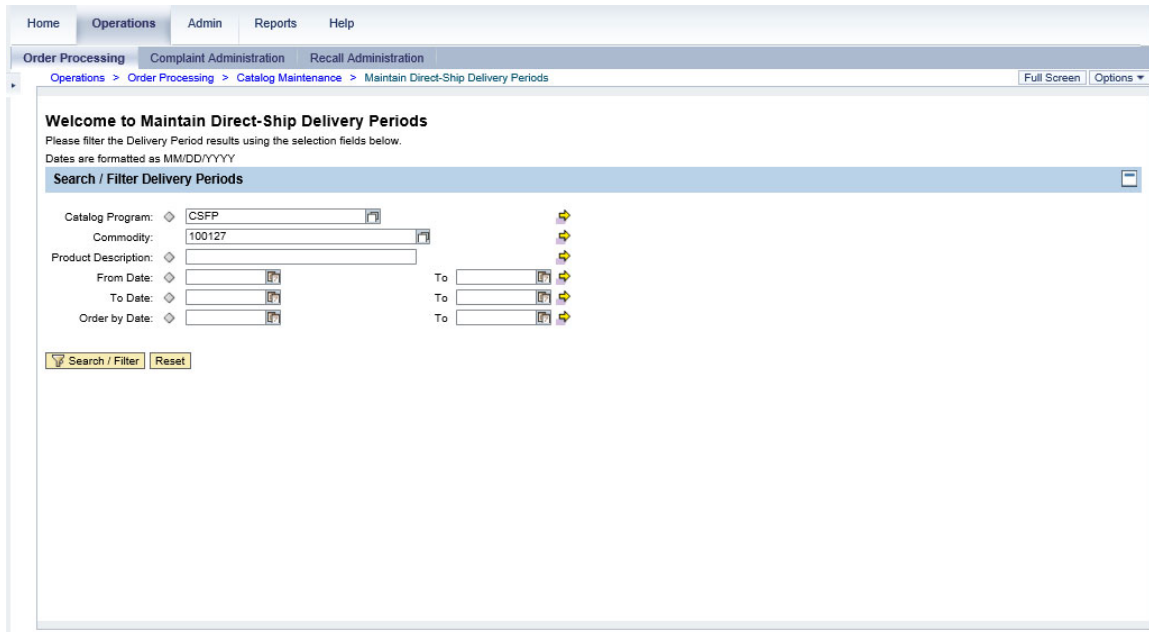
Field	R/O/C	Description
Catalog Program	R	The program associated with the commodity.  <b>Example:</b> CSFP
Commodity	R	A Commodity is a substance that is bought or sold on a commercial basis, or is used, consumed, or created in production. It is usually identified by a number identifying its master record.  <b>Example:</b> 100127
Product Description	O	Information used to characterize a material.
From Date	O	Beginning date.   (Note) Users can enter a single date or a range of dates. Enter end date of range in the 1EA42E9629D548D187FD88222DE55 65B61DAE25139534354BB63324476A 7D0BC <b>To</b> field.1EA42E9629D548D187FD88222D E5565B61DAE25139534354BB633244 76A7D0BC
To Date	O	Ending date for specifying a delivery time period.   (Note) Users can enter a single date or a range of dates. Enter end date of range in the 1EA42E9629D548D187FD88222DE55 65B61DAE25139534354BB63324476A 7D0BC <b>To</b> field.1EA42E9629D548D187FD88222D E5565B61DAE25139534354BB633244 76A7D0BC
Order by Date	O	Last date to submit orders for the corresponding Delivery Date.   (Note) Users can enter a single date or a range of dates. Enter end date of range in the 1EA42E9629D548D187FD88222DE55 65B61DAE25139534354BB63324476A 7D0BC <b>To</b>

Field	R/O/C	Description
		field.1EA42E9629D548D187FD88222D E5565B61DAE25139534354BB633244 76A7D0BC



(Note) Refer to the [Wildcard and Matchcode Searches Job Aid](#) for tips to search for or select values from a list.

**Image: Maintain Direct-Ship Delivery Periods Screen**

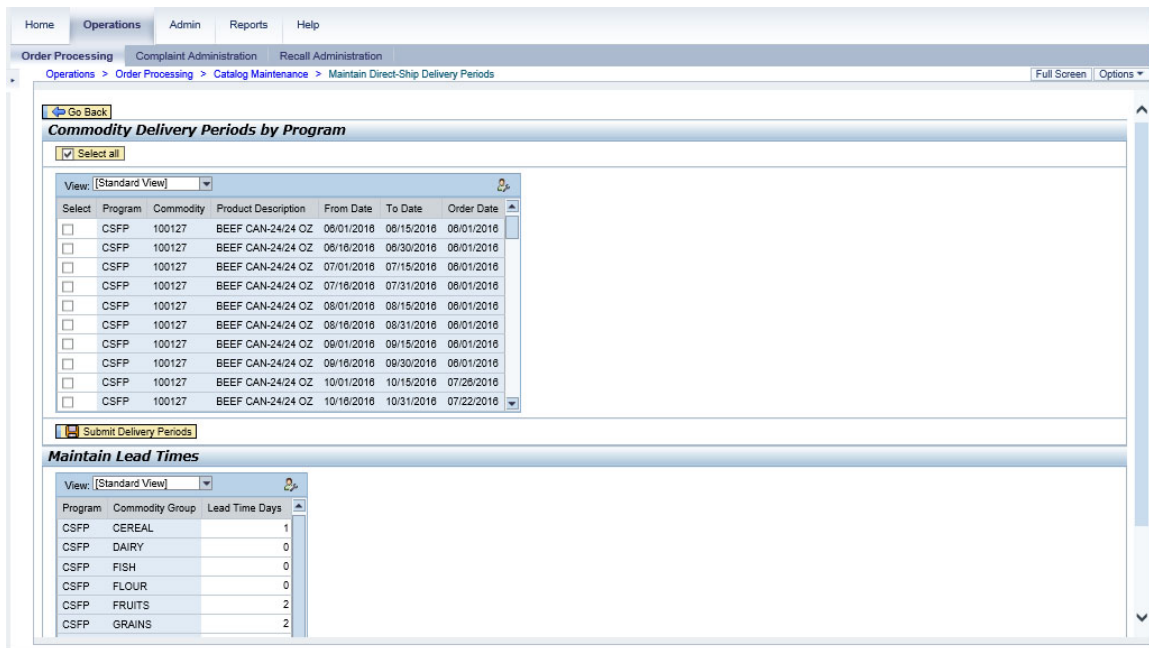


- Click (the **Search / Filter** button) to perform the search. All available delivery periods that match the selection criteria will display.



(Note) Delivery periods for a commodity are created by FNS; SDA/ITO Order Managers cannot create new delivery periods.

**Image: Maintain Direct-Ship Delivery Periods Screen**



5. In the *Commodity Delivery Periods by Program* section, perform one or more of the following:

If	Then
The user wants to select all delivery periods	Click <input checked="" type="checkbox"/> <b>Select all</b> (the <b>Select all</b> button)
The user wants to select specific delivery period(s)	Click <input type="checkbox"/> (the <b>checkbox</b> icon) next to the line item
The user wants to deselect all delivery period(s)	Click <input type="checkbox"/> <b>De-Select all</b> (the <b>De-Select all</b> button)
The user wants to unselect specific delivery period(s)	Click <input checked="" type="checkbox"/> (the <b>checked box</b> icon) next to the line item



(Note) SDA/ITOs determines which delivery periods will be available to their suborganizations.

## Image: Maintain Direct-Ship Delivery Periods Screen

Select	Program	Commodity	Product Description	From Date	To Date	Order Date
<input checked="" type="checkbox"/>	CSFP	100127	BEEF CAN-24/24 OZ	06/01/2016	06/15/2016	06/01/2016
<input checked="" type="checkbox"/>	CSFP	100127	BEEF CAN-24/24 OZ	06/16/2016	06/30/2016	06/01/2016
<input checked="" type="checkbox"/>	CSFP	100127	BEEF CAN-24/24 OZ	07/01/2016	07/15/2016	06/01/2016
<input checked="" type="checkbox"/>	CSFP	100127	BEEF CAN-24/24 OZ	07/16/2016	07/31/2016	06/01/2016
<input checked="" type="checkbox"/>	CSFP	100127	BEEF CAN-24/24 OZ	08/01/2016	08/15/2016	06/01/2016
<input checked="" type="checkbox"/>	CSFP	100127	BEEF CAN-24/24 OZ	08/16/2016	08/31/2016	06/01/2016
<input checked="" type="checkbox"/>	CSFP	100127	BEEF CAN-24/24 OZ	09/01/2016	09/15/2016	06/01/2016
<input checked="" type="checkbox"/>	CSFP	100127	BEEF CAN-24/24 OZ	09/16/2016	09/30/2016	06/01/2016
<input checked="" type="checkbox"/>	CSFP	100127	BEEF CAN-24/24 OZ	10/01/2016	10/15/2016	07/28/2016
<input checked="" type="checkbox"/>	CSFP	100127	BEEF CAN-24/24 OZ	10/16/2016	10/31/2016	07/22/2016

Program	Commodity Group	Lead Time Days
CSFP	CEREAL	1
CSFP	DAIRY	0
CSFP	FISH	0
CSFP	FLOUR	0
CSFP	FRUITS	2
CSFP	GRAINS	2

- Click **Submit Delivery Periods** (the **Submit Delivery Periods** button) to apply the selected delivery periods to all assigned RAs.



(Note) When changes are applied, the message *Data was saved successfully!* displays at the top of the screen.

## Image: Maintain Direct-Ship Delivery Periods Screen

Select	Program	Commodity	Product Description	From Date	To Date	Order Date
<input checked="" type="checkbox"/>	CSFP	100127	BEEF CAN-24/24 OZ	06/01/2016	06/15/2016	06/01/2016
<input checked="" type="checkbox"/>	CSFP	100127	BEEF CAN-24/24 OZ	06/16/2016	06/30/2016	06/01/2016
<input checked="" type="checkbox"/>	CSFP	100127	BEEF CAN-24/24 OZ	07/01/2016	07/15/2016	06/01/2016
<input checked="" type="checkbox"/>	CSFP	100127	BEEF CAN-24/24 OZ	07/16/2016	07/31/2016	06/01/2016
<input checked="" type="checkbox"/>	CSFP	100127	BEEF CAN-24/24 OZ	08/01/2016	08/15/2016	06/01/2016
<input checked="" type="checkbox"/>	CSFP	100127	BEEF CAN-24/24 OZ	08/16/2016	08/31/2016	06/01/2016
<input checked="" type="checkbox"/>	CSFP	100127	BEEF CAN-24/24 OZ	09/01/2016	09/15/2016	06/01/2016
<input checked="" type="checkbox"/>	CSFP	100127	BEEF CAN-24/24 OZ	09/16/2016	09/30/2016	06/01/2016
<input checked="" type="checkbox"/>	CSFP	100127	BEEF CAN-24/24 OZ	10/01/2016	10/15/2016	07/28/2016
<input checked="" type="checkbox"/>	CSFP	100127	BEEF CAN-24/24 OZ	10/16/2016	10/31/2016	07/22/2016

Program	Commodity Group	Lead Time Days
CSFP	CEREAL	1
CSFP	DAIRY	0
CSFP	FISH	0
CSFP	FLOUR	0
CSFP	FRUITS	2
CSFP	GRAINS	2
CSFP	JUICE	2
CSFP	MEAT	0
CSFP	MISC	2
CSFP	OILS	0



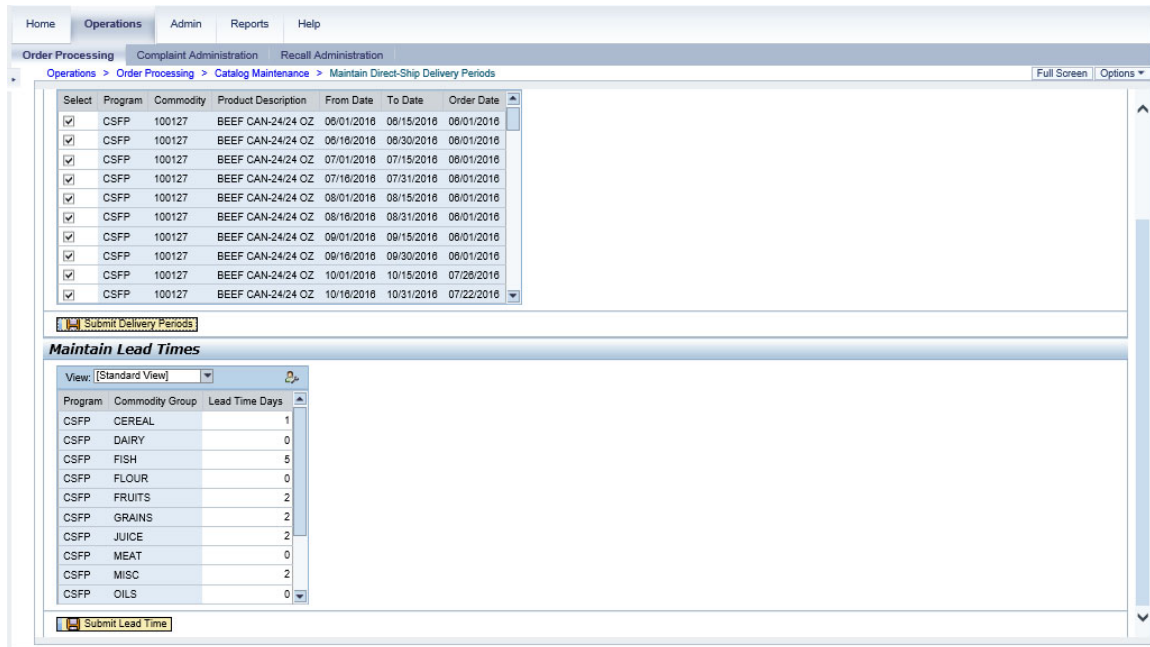
- In the **Maintain Lead Times** section enter the number of **Lead Time Days** for the appropriate **Commodity Group**. In this example, a lead time of 5 days was entered for the FISH.



(Note) Lead time is entered as a number of days in advance of the date orders are due to FNS for a delivery period. This gives the SDA/ITO additional time to review and consolidate orders. For example, if orders are due to FNS on 10/1 and the SDA/ITO has set the **Lead Time Days** at 5, the RA must submit their order to SDA/ITO no later than 9/25.

Lead time is always set for the commodity group—not a specific commodity; for example, all “MEAT” would have the same lead time.

**Image: Maintain Direct-Ship Delivery Periods Screen**



- Click  (the **Submit Lead Time** button) to apply the selected lead time to all assigned RAs .



(Note) When changes are applied, the message *Data was saved successfully!* displays at the top of the screen.

- This transaction is complete.



Work Instruction  
Maintain RA Delivery Periods and Order Lead Time

**RESULT**

An SDA/ITO Order Manager selected delivery periods and entered lead time for all assigned RAs.



## PROCESS OVERVIEW

### Purpose

The purpose of this procedure is for a user logged in as a State Distributing Agency/Indian Tribal Organization (SDA/ITO) to view and export a domestic catalog view maintained for their Recipient Agencies (RAs). SDA/ITOs can ensure that the catalog has been set up accurately by viewing it as it would appear to an RA; they also have the ability to download a catalog to either communicate the products/delivery dates to the RAs or for preserving the information for review. This document includes process steps to review a catalog prepared for an RA as well as export the catalog.

SDA/ITOs create catalogs for RAs for the following programs:

- **TEFAP** - The Emergency Food Assistance Program
- **NSIP** - Nutrition Services Incentive Program
- **NSLP** - National School Lunch Program
- **SFSP** - Summer Food Service Program
- **CACFP** - Child and Adult Care Food Program
- **CSFP** - Commodity Supplemental Food Program
- **FDPIR** - Food Distribution Program on Indian Reservations
- **DA** - Disaster Assistance

### Process Trigger

Perform this transaction after creating or updating an RA catalog view.

### Prerequisites

- The RA Catalog view must exist in WBSCM

### Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab → **Catalog Maintenance** folder → **Display RA Catalog** link to go to the *Display RA Catalog* screen.

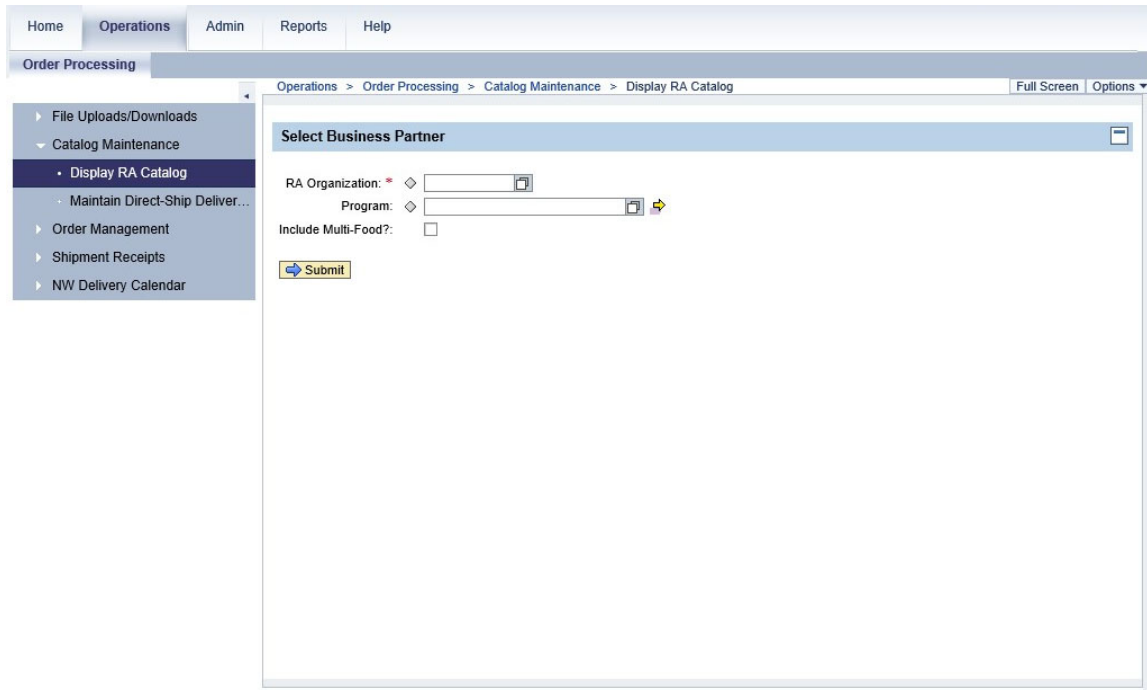
### Tips and Tricks

- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
  - **Required (R)** – a mandatory field necessary to complete the transaction
  - **Optional (O)** – a non-mandatory field not required to complete the transaction
  - **Conditional (C)** – a field that may be required if certain conditions are met, typically linked to completion of a mandatory field
- Refer to the WBSCM Help site, *Frequently Referenced Training Materials* section for basic navigation training and tips on creating favorites, performing searches, etc.

## PROCEDURE


1. Start the transaction using the following Portal path: **Operations** tab → **Catalog Maintenance** folder → **Display RA Catalog** link to go to the *Display RA Catalog* screen.

### Image: Display RA Catalog Screen

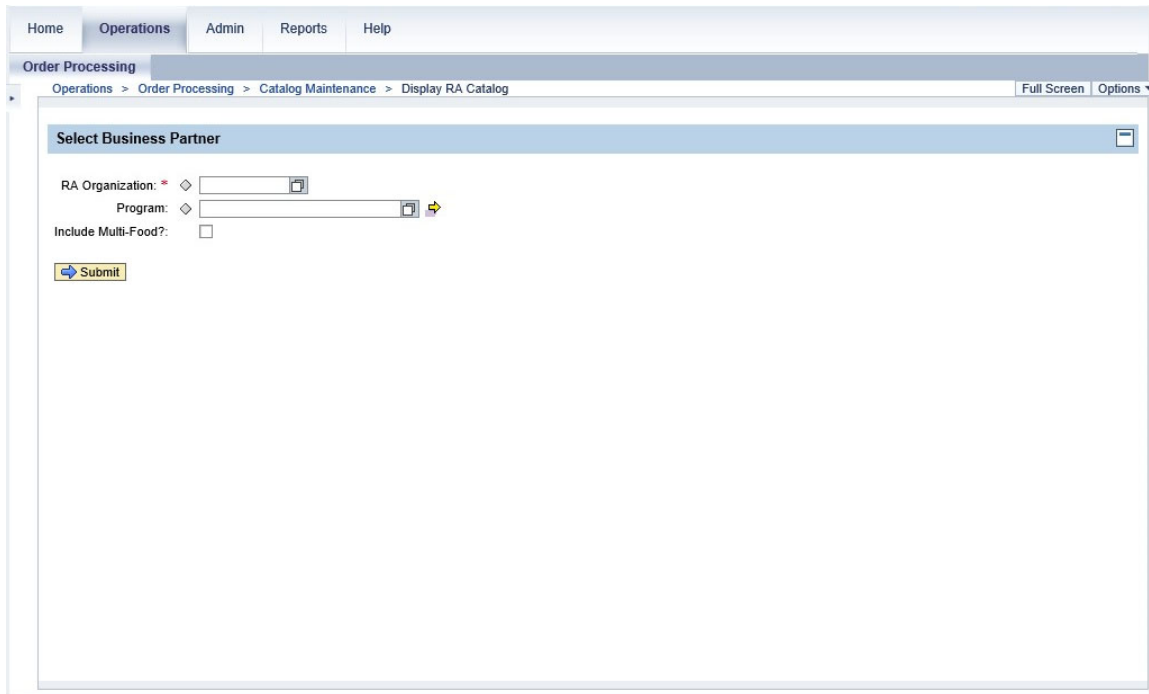


The screenshot shows the 'Display RA Catalog' screen within the WBSCM portal. The top navigation bar includes 'Home', 'Operations', 'Admin', 'Reports', and 'Help'. Below this, the 'Order Processing' section is active, with a breadcrumb trail: 'Operations > Order Processing > Catalog Maintenance > Display RA Catalog'. A left-hand navigation menu is visible, with 'Display RA Catalog' selected. The main content area is titled 'Select Business Partner' and contains the following fields:



- RA Organization: \* (dropdown menu)
- Program: (dropdown menu)
- Include Multi-Food?:
- Submit button

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

**Image: Display RA Catalog Screen**








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

Field	R/O/C	Description
RA Organization: *	R	The Recipient Agency.  <b>Example:</b> 4001181   (Note) Only one RA Organization can be selected at a time. 1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC
Program:	O	Acronym to identify a USDA food distribution program.
Include Multi-Food?:	O	When checked, multi-food commodities are included.   (Note) The 1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC <b>Include Multi-Food?:</b> field defaults to unchecked. 1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC






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




Field	R/O/C	Description
Program	O	Acronym to identify a USDA food distribution program.
Program Sub-Type	O	<p>Within a USDA program, distinguishes the sub-program used to process and deliver products.</p> <p> (Note) 1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC <b>Program Sub-Types</b> include the following:</p> <ul style="list-style-type: none"> <li>• Direct Delivery</li> <li>• Processing Diversion</li> <li>• Multi-Food</li> </ul> <p>1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC</p>
Catalog Type	O	<p>The type of product included in a catalog.</p> <p> (Note) All catalog types do not apply to all programs. Each program has a unique set of catalog types associated with it. 1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC</p> <p> (Note) For multi-food entries and the DA Program, this field will be blank. 1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC</p>
Program Type	O	<p>The manner in which a program is funded.</p> <p> (Note) 1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC <b>Program Types</b> include:</p> <ul style="list-style-type: none"> <li>• Entitlement</li> <li>• Bonus</li> </ul> <p>1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC</p> <p> (Note) For Multi-Food entries and the DA Program, this field will be blank. 1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC</p>




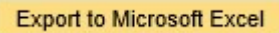
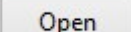


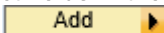
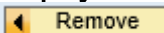
Work Instruction  
Display RA Catalog Views





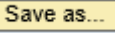









Field	R/O/C	Description
Product Group	O	Group to which the product or material belongs.
Product Number	O	Unique identifier assigned to a product.
Product Description	O	Information used to characterize a material.
Unit	O	Unit of measurement (such as cases or pounds) for ordering products.
RA Order By Date	O	<p>The date by which the RA must place the order.</p> <p><b>Example:</b></p> <p> (Note) The 1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BCRA <b>Order By Date</b> is calculated by subtracting the <b>SDA Lead Time</b> from the <b>FNS Order By Date</b>. 1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC</p> <p> (Note) For Multi-Food entries, this field will be "Not Applicable". 1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC</p>
SDA Lead Time	O	<p>The number of days prior to the FNS Order By Date that the RA has to submit their requisitions to the SDA for review and consolidation.</p> <p> (Note) For Multi-Food entries, this field will be zero. 1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC</p>




Field	R/O/C	Description
FNS Order By Date	O	<p>The date by which FNS requires the consolidated order to be submitted.</p> <p> (Note) For Multi-Food entries, this field will be blank. 1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC</p>
Deliver By Date	O	<p>The date by which the products should be delivered.</p> <p> (Note) The 'NO Delivery Date Set' value will appear under the 1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BCRA Order By Date column field when SDAs do not assign to their RA View. 1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC</p> <p> (Note) For Multi-Food entries, this field will be blank. 1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC</p>

6. Perform any of the following:

If	Then
The user needs to download RA catalog view	<ol style="list-style-type: none"> <li>1. Click  (the <b>Export</b> button) to export the catalog view data.</li> <li>2. Click  (the <b>Export to Microsoft Excel</b> button).</li> <li>3. Click  (the <b>Open</b> button).</li> <li>4. Review and save the spreadsheet as appropriate.</li> <li>5. Click  (the <b>Close</b> button) to close the spreadsheet and return to the transaction.</li> </ol>
The user needs to customize the appearance of the RA catalog	<ol style="list-style-type: none"> <li>1. Click  (the <b>Open Settings</b> button) located on the right side of the screen.</li> <li>2. As appropriate, select fields in the <b>Hidden Columns</b> and click  (the <b>Add</b> button) to add columns to the displayed view.</li> <li>3. As appropriate, select fields in the <b>Displayed Columns</b> and click  (the <b>Remove</b> button) to</li> </ol>

If	Then
	<p>remove columns from the displayed view.</p> <ol style="list-style-type: none"> <li>As appropriate, select fields in the <b>Displayed Columns</b> and click     (the <b>Up/Down</b> arrows) to change the column order.</li> <li>Click  (the <b>Save as...</b> button) to save the new view.</li> <li>Name the new view in the <b>Description</b> field.</li> <li>Click  (the <b>OK</b> button).</li> </ol> <p> (Note) The new view can be selected from the <b>Views</b> field the next time the transaction is required.</p> <p> (Note) The RA catalog view can be downloaded after making changes to the columns.</p>
<p>The user needs to limit the amount of information displayed</p>	<ol style="list-style-type: none"> <li>Click  (the <b>Open Settings</b> button) located on the right side of the screen.</li> <li>Click  (the <b>Filter</b> tab).</li> <li>Click  (the <b>Drop-down</b> button) in the first field to select the column to be filtered from the drop-down list.</li> <li>Click  (the <b>Matchcode</b> button) in the third field to select a value for which filtering is required.</li> <li>Review the filtered display as appropriate.</li> </ol> <p> (Note) Only records that match the applied filter(s) will be displayed.</p> <p> (Note) The RA catalog view can be downloaded after applying a filter.</p>

 (Note) Export file download prompt may appear different based on the user's browser.

7. The transaction is complete.



Work Instruction  
Display RA Catalog Views

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**RESULT**

The SDA/ITO has reviewed the RA catalog details, using the available tools to customize the appearance of or apply filters to the catalog, as applicable. If appropriate, the SDA/ITO may also have exported the view as a spreadsheet for further review, record-keeping, or sharing outside of WBSCM.



## PROCESS OVERVIEW

### Purpose

This transaction enables a State Distributing Agency (SDA) or Indian Tribal Organization (ITO) to export a catalog from WBSCM to their computer. The catalog can be filtered by program, delivery dates, and NLT dates. Results are generated in XML or CSV format and may be displayed, printed, or saved.

### Process Trigger

Use this procedure to download the catalog in XML or CSV format.

### Prerequisites

- Catalog view must be assigned to SDA/ITO.
- Materials must exist in WBSCM.
- Delivery periods and NLT dates must be set up for the materials.

### Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab → **Order Processing** tab → **File Uploads/Downloads** folder → **Download Catalog** link to go to the *Download Catalog* screen.

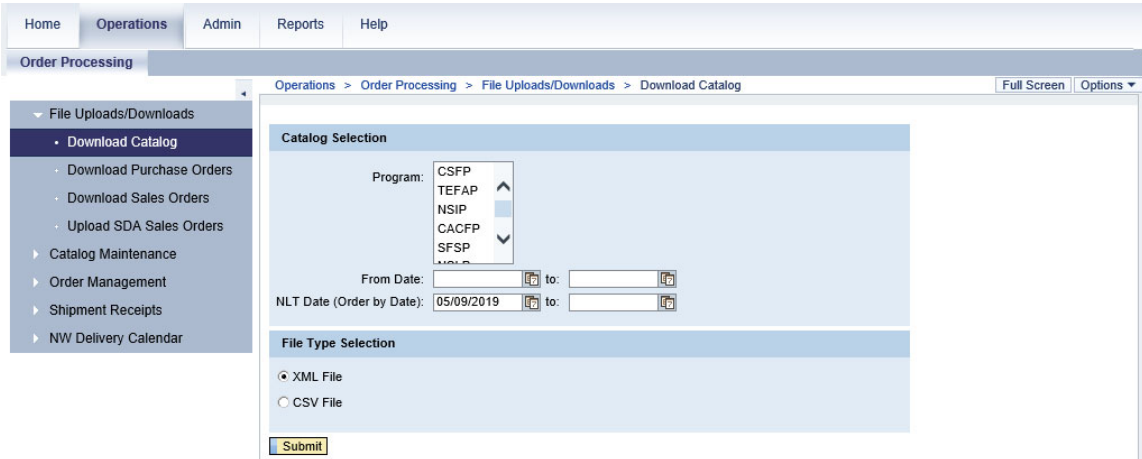
### Tips and Tricks


- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
  - **Required (R)** - a mandatory field necessary to complete the transaction.
  - **Optional (O)** - a non-mandatory field not required to complete the transaction.
  - **Conditional (C)** - a field that may be required if certain conditions are met, typically linked to completion of a mandatory field.
- Refer to the WBSCM Help site, *Frequently Referenced Training Materials* section for basic navigation training and tips on creating favorites, performing searches, etc.

## PROCEDURE

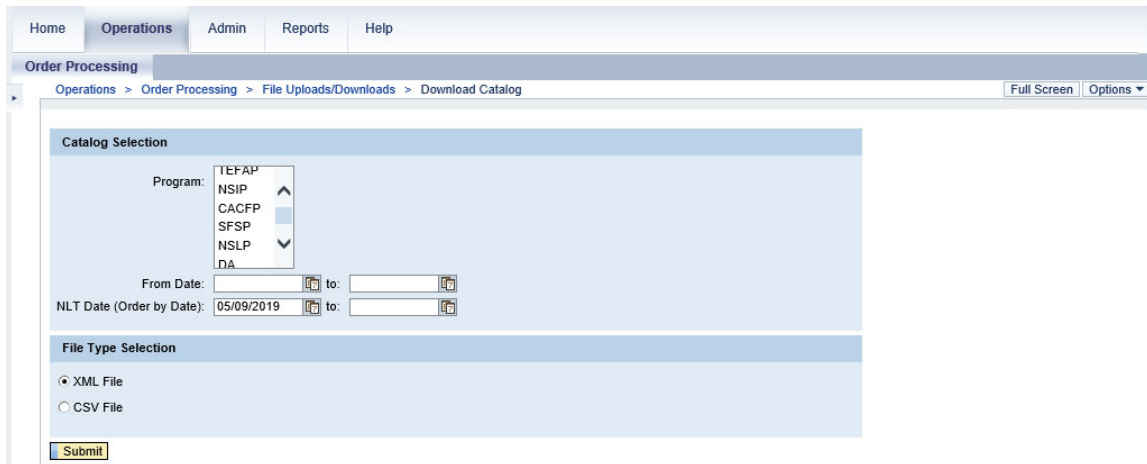
1. Start the transaction using the Portal path: **Operations** tab → **Order Processing** tab → **File Uploads/Downloads** folder → **Download Catalog** link.

### Image: Download Catalog Screen



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

### Image: Download Catalog Screen





3. Select the appropriate option from the **Program** drop-down list.



(Note) Hold the **Ctrl** key to select more than one program. All USDA program catalogs are available for selection.

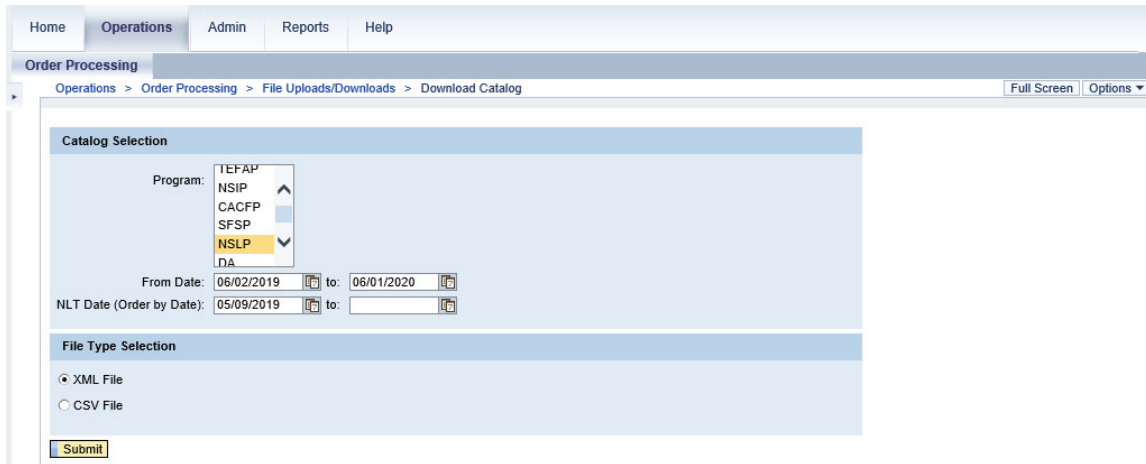
4. As required, complete/review the following fields:

Field	R/O/C	Description
From Date:	R	Beginning value to be entered when specifying a date range.  <b>Example:</b> 06/02/2019   (Note) Use the <b>To Date:</b> field to enter the end value for the date range.
NLT Date (Order by Date):	R	No Later Than Date. The date by which an order needs to be placed in order to receive a specified shipping date.  <b>Example:</b> 05/01/2019   (Note) Use the <b>To Date:</b> field to enter the end value for the date range.



(Note) Enter dates in MM/DD/YYYY format, or click the calendar icon adjacent to the field to select from the calendar.

**Image: Download Catalog Screen**

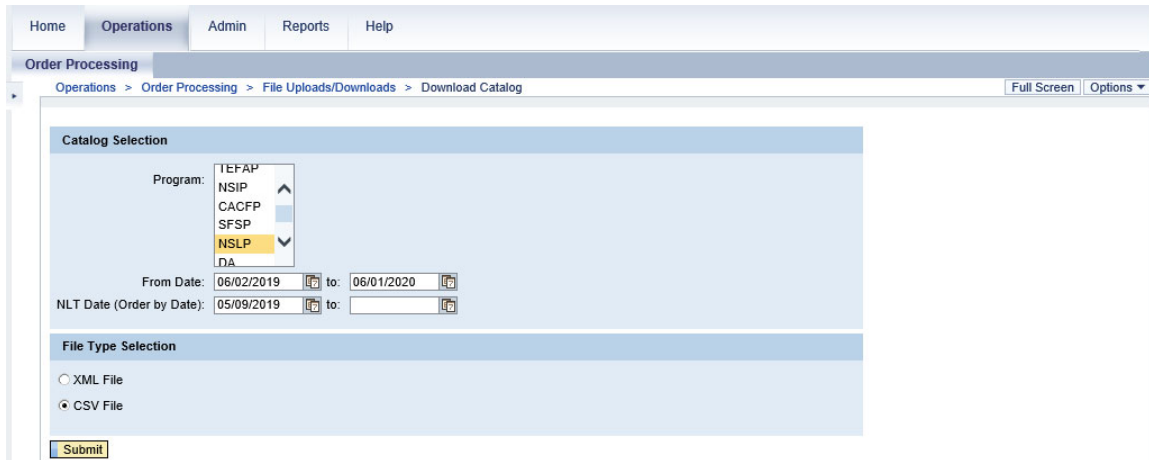


5. Under *File Type Selection*, select  (the **Radio** button) beside the desired download format for the file. In this example, **CSV File** is selected.



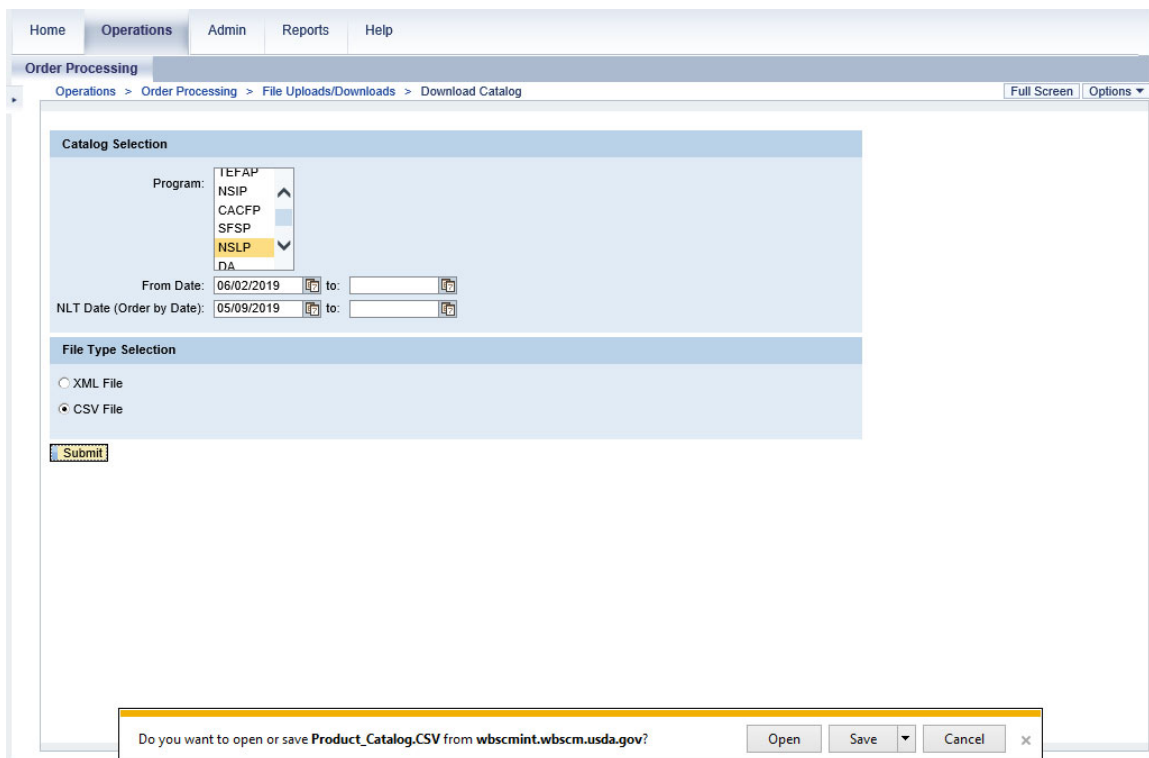
(Note) **XML** is usually used to upload the file into another system. **CSV** displays data in a spreadsheet format.

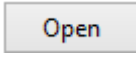
### Image: Download Catalog Screen



6. Click  (the **Submit** button) to apply the selected options and initiate the download.

### Image: Download Catalog Screen



7. An option displays to select a download action. In this example,  (the **Open** button) is selected.



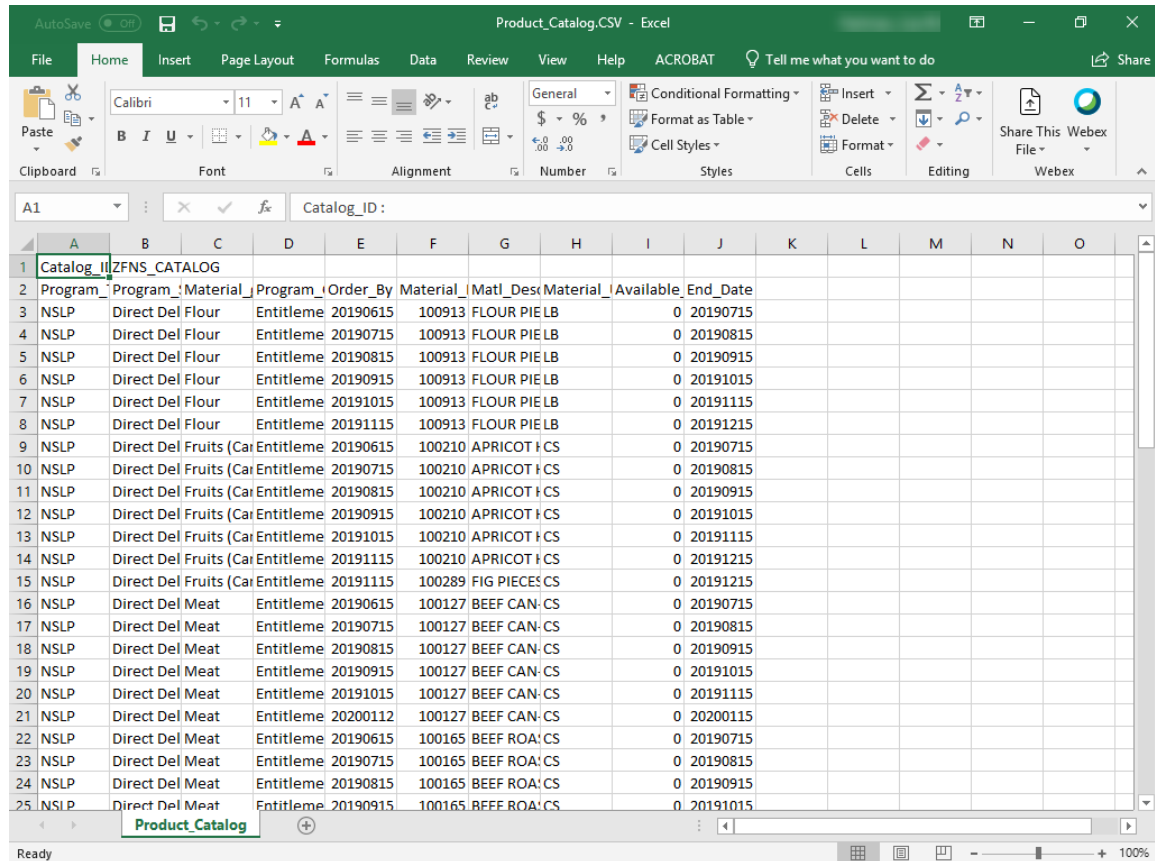
(Note) Download file prompt may appear different based on the user's browser. To download in Chrome, refer to the Download/Export Document section in the [WBSCM Portal Navigation](#) job aid.



(Note) Options include:

- **Open** displays the downloaded data in the appropriate application. For **CSV** files, this is the user's default spreadsheet software (for example, Excel). The file is not automatically saved.
- **Save** prompts the user to select a location to save the file. The file is not automatically opened for viewing.
- **Cancel** exits the process without downloading the catalog.

**Image: Microsoft Excel Spreadsheet**



Catalog_ID	Program	Material	Order By	Material	Matl_Des	Material	Available	End Date
1	NSLP	Direct Del Flour	Entitlement	20190615	100913	FLOUR PIE LB	0	20190715
2	NSLP	Direct Del Flour	Entitlement	20190715	100913	FLOUR PIE LB	0	20190815
3	NSLP	Direct Del Flour	Entitlement	20190815	100913	FLOUR PIE LB	0	20190915
4	NSLP	Direct Del Flour	Entitlement	20190915	100913	FLOUR PIE LB	0	20191015
5	NSLP	Direct Del Flour	Entitlement	20191015	100913	FLOUR PIE LB	0	20191115
6	NSLP	Direct Del Flour	Entitlement	20191115	100913	FLOUR PIE LB	0	20191215
7	NSLP	Direct Del Fruits (Car	Entitlement	20190615	100210	APRICOT † CS	0	20190715
8	NSLP	Direct Del Fruits (Car	Entitlement	20190715	100210	APRICOT † CS	0	20190815
9	NSLP	Direct Del Fruits (Car	Entitlement	20190815	100210	APRICOT † CS	0	20190915
10	NSLP	Direct Del Fruits (Car	Entitlement	20190915	100210	APRICOT † CS	0	20191015
11	NSLP	Direct Del Fruits (Car	Entitlement	20191015	100210	APRICOT † CS	0	20191115
12	NSLP	Direct Del Fruits (Car	Entitlement	20191115	100210	APRICOT † CS	0	20191215
13	NSLP	Direct Del Fruits (Car	Entitlement	20191115	100289	FIG PIECES CS	0	20191215
14	NSLP	Direct Del Meat	Entitlement	20190615	100127	BEEF CAN CS	0	20190715
15	NSLP	Direct Del Meat	Entitlement	20190715	100127	BEEF CAN CS	0	20190815
16	NSLP	Direct Del Meat	Entitlement	20190815	100127	BEEF CAN CS	0	20190915
17	NSLP	Direct Del Meat	Entitlement	20190915	100127	BEEF CAN CS	0	20191015
18	NSLP	Direct Del Meat	Entitlement	20191015	100127	BEEF CAN CS	0	20191115
19	NSLP	Direct Del Meat	Entitlement	20200112	100127	BEEF CAN CS	0	20200115
20	NSLP	Direct Del Meat	Entitlement	20190615	100165	BEEF ROA CS	0	20190715
21	NSLP	Direct Del Meat	Entitlement	20190715	100165	BEEF ROA CS	0	20190815
22	NSLP	Direct Del Meat	Entitlement	20190815	100165	BEEF ROA CS	0	20190915
23	NSLP	Direct Del Meat	Entitlement	20190915	100165	BEEF ROA CS	0	20191015

8. Review the downloaded data. For additional information on fields included in the download file, refer to [FNS resources for WBSCM data files](#).
9. The transaction is complete.





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## RESULT

The user has downloaded a copy of the catalog based on the program and date selections. Depending on the file format and downloaded action selected, the catalog may be viewed, printed, or saved as a spreadsheet (CSV) or saved for uploading to another system (XML).