

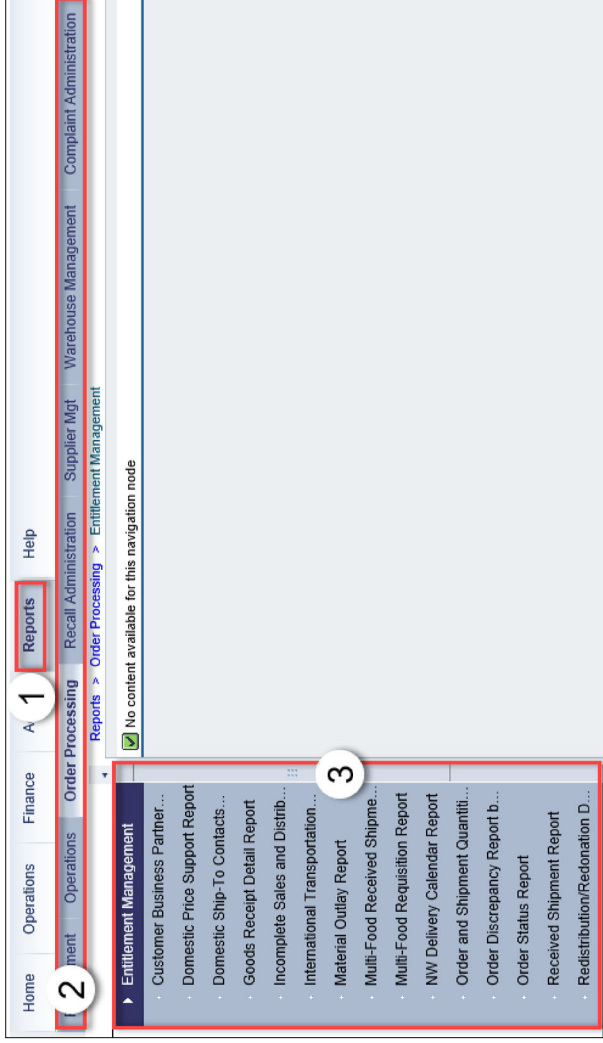


Job Aid
Working with Standard WBSCM Reports

<p>Job Aid Title</p> <p>Purpose</p>	<p>Working with Standard WBSCM Reports</p> <p>This job aid reviews key components of standard WBSCM reports. Standard reports include operational details, transaction level reporting, and base-level analytics. The available standard reports are based on user role. This job aid does not apply to advanced analytics using Business Integration (BI) features of WBSCM.</p> <p>This job aid reviews:</p> <ul style="list-style-type: none">• Navigate to a Report• Enter Selection Criteria<ul style="list-style-type: none">○ Wildcards○ Matchcodes○ Selection Options to Select Records○ Selection Options to Exclude Records○ Advanced Options to Define a Range• Variants<ul style="list-style-type: none">○ Create a Variant○ Load a Variant• View the Report<ul style="list-style-type: none">○ Sort Columns○ Filter Results○ Add Calculation for a Column○ Add/Remove Columns○ Move Columns○ Update the Display• Save Custom Report View• Apply Report View• Save Report Output as PDF• Save Report Output as XLS <p>Note: For most examples, this job aid uses the Multi-food Requisition Report.</p>
<p>Target Audience</p>	<p>All WBSCM Users</p>



WBSCM Screen

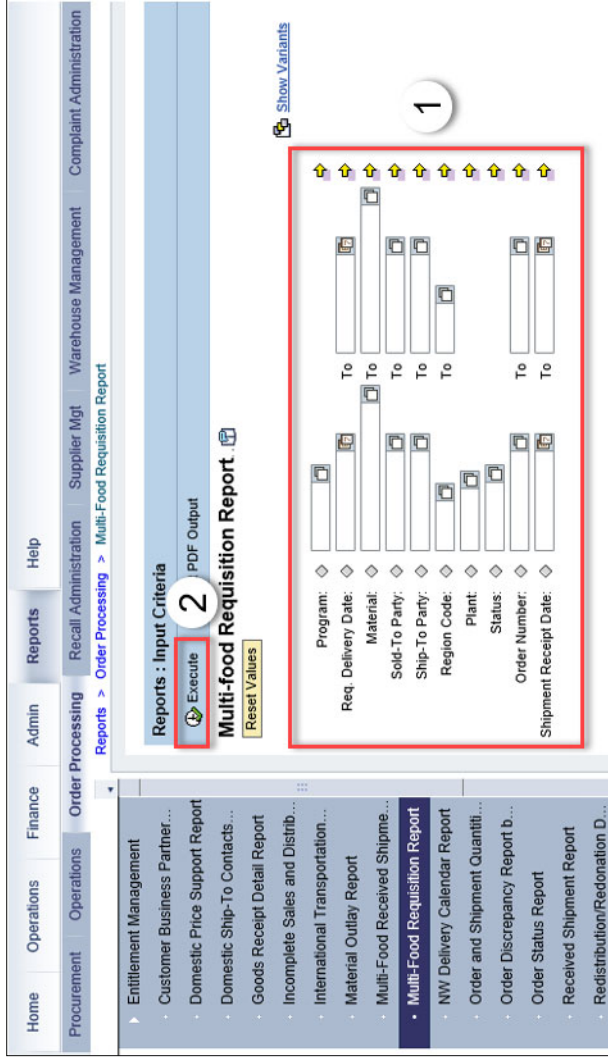


Navigate to a Report

To navigate to a report:

1. Select the **Reports** tab.
2. Select a category tab in the second row of tabs. In this example, the **Order Processing** category is selected.
3. The panel on the left side of the screen displays the list of available reports for the category. Select the appropriate report from this panel.

Initial Report Screen




The screenshot shows the 'Multi-Food Requisition Report' screen. The navigation menu at the top includes Home, Operations, Finance, Admin, Reports, and Help. The 'Reports' menu is expanded, showing 'Multi-Food Requisition Report' selected. The main content area has a 'Reports : Input Criteria' section with an 'Execute' button (circled in red with a '2') and a 'PDF Output' button. Below this is the 'Multi-Food Requisition Report' section with a 'Reset Values' button. The 'Input Criteria' section (circled in red with a '1') contains the following fields:

- Program: [Dropdown]
- Req. Delivery Date: [Dropdown] To [Text]
- Material: [Dropdown] To [Text]
- Sold-To Party: [Dropdown] To [Text]
- Ship-To Party: [Dropdown] To [Text]
- Region Code: [Dropdown] To [Text]
- Plant: [Dropdown]
- Status: [Dropdown]
- Order Number: [Dropdown] To [Text]
- Shipment Receipt Date: [Dropdown] To [Text]

Enter Selection Criteria

In this example, the Multi-Food Requisition Report was selected.

Any required criteria will be marked with * (the asterisk). Users may manually enter values for search criteria fields or use the date-picker (calendar) or other available tools to select from a list of values or to narrow or expand search criteria. For some fields, users can enter both a low value and a high value (after **To**) to select from this range of values.

1. Enter or choose record selection criteria on the Reports: Input Criteria screen.
2. Click  (the **Execute** button) to generate the report.

Note: To avoid a delayed system response, do not run the report without entering any search criteria.



Wildcard Searches

Reports : Input Criteria

Execute | Print PDF Output

Multi-food Requisition Report

Reset Values

Program:

Req. Delivery Date: To

Material:

Sold-To Party:

Ship-To Party:

Region Code:

Plant:

Status:

Order Number:

Shipment Receipt Date:

View: MULTI_FOOD_REQ | Export

Batch Number	Date Received	Sales Order #	SO Item #
		1000336:94	100
AT0001	03/24/2020	1000336:94	100
AT0002	03/24/2020	1000336:94	100
AT0003	03/24/2020	1000336:94	100
		1000336:94	200
AT0001	03/24/2020	1000336:94	200
AT0002	03/24/2020	1000336:94	200
AT0001	03/24/2020	1000336:94	300
AT0001	03/24/2020	1000336:94	400
		1000336:94	500
AT0001	03/24/2020	1000336:94	500
AT0002	03/24/2020	1000336:94	500
AT0003	03/24/2020	1000336:94	500
AT0001	03/24/2020	1000336:94	600
AT0001	03/24/2020	1000336:94	700

Wildcards

If the user only knows a portion or the field entry and/or only wants to enter a portion of the string, they can use wildcards in any field that allows manual entry. Use an asterisk (*) as a wildcard to represent one or more missing characters. Wildcards can be placed in any position and may be used more than once (e.g., at both the beginning and end of the search string).

When the user submits a search containing a wildcard, WBSM returns all records containing the entered text relative to the position of additional characters represented by the wildcard(s).

1. Enter the wildcard in a search criteria field.

In this example, the user knows only the last two digits of the value for the **Order Number** field. Therefore, the user enters ***94**, where the wildcard ***** represents any character or combination of characters that precede the number **94**.

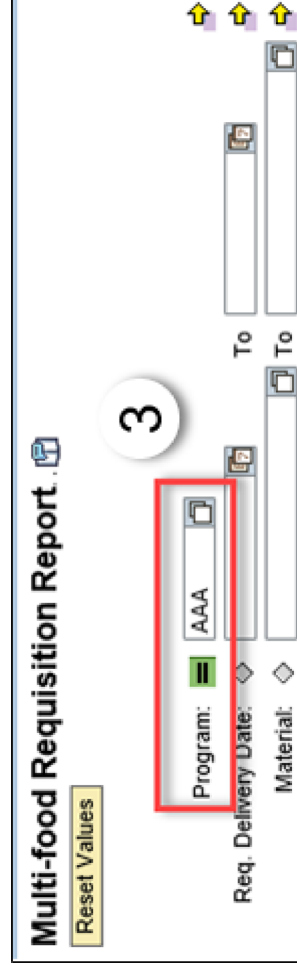
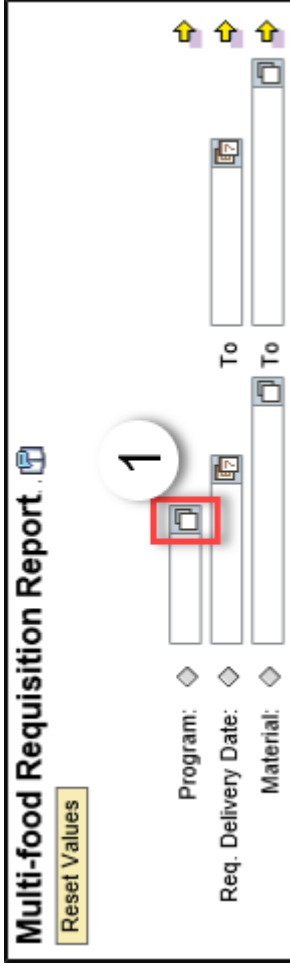
2. Review the search results.

In this example, the results include all values that end with the numbers **94**.

The following table outlines common combinations of wildcard searches:

Scenario	Wildcard Position	Example search for 123456789
Beginning character(s) known	After text	12*
Ending character(s) known	Before text	*789
Middle character(s) known	Before and after text	*34*
Beginning and middle characters known	Between and after text	1*45*
Beginning and ending characters known	Between text	1234*9
Middle and ending characters known	Before and between text	*5*789

Matchcode Searches



Matchcodes

Matchcodes allow the user to select from a list of possible values.

1. Select (the **Matchcode** button) to display a list of possible values.
In this example, the value for the **Program** field is not known.
2. Click (the **Select** button) to the left of the correct value.
3. The field is populated with the selected value.

Matchcode Searches

Multi-food Requisition Report

[Reset Values](#)

Program: AAAA

Req. Delivery Date: To

Material: To

Sold-To Party: To

Ship-To Party: **1** To

Region Code: To

Plant: To

Search: Ship-To Party

Search Criteria: Personal Value List Hide Search Criteria

Further Search: Customers (general)

2 Search term: contains AGRI

3 Search: Clear Entries Reset to Default

Maximum Number of Results: 500

4 Results List: 5 results found for Ship-To Party

Search	Coun	Postal Co.	City	Name	Customer	Deletion flag
AGRI DAIRY	US	10577-2525	3020 WESTCHESTER AVE	AGRI-DAIRY PRODUCTS, I...	1000101	
AGRIBAG	US	94601-3931	OAKLAND	AGRIBAG, INC.	1002116	
AGRICOR	US	46953-9633	1626 SOUTH JOAQUIN DR...	AGRICOR INC	1000245	
BEST AGRI-	US	93673-0459	PO BOX 459	BEST AGRI-MARKETING, I...	1002019	
COOP AG...	US	98211-1973	SPOKANE VALLEY	COOPERATIVE AGRICULT...	1002371	

Multi-food Requisition Report

[Reset Values](#)

Program: AAAA

Req. Delivery Date: To

Material: To

Sold-To Party: To

Ship-To Party: **5** To

Region Code: To

Plant: To

Matchcodes with a Large List of Values

If a matchcode value list contains a large number of options (between 100 and 500 options depending on the report), WBCSCM prompts the user to enter additional search criteria.

1. Select  (the **Matchcode** button) to display the *Search* window.

In this example, the user is looking up a value for the **Ship-To Party** field, and the list is too long to be displayed.


2. Select search option in the first column and select a match type for each applicable field in the second column. Match type choices are:
 - Is
 - Is empty
 - Is not
 - Is not empty
 - Contains
 - Is between (for numeric values)
 - Is greater than (for numeric values)
 - Is less than (for numeric values)
 - Is greater than or equal to (for numeric values)
 - Is less than or equal to (for numeric values)

Enter the search criteria in the third column

In this example, the user knows the name contains the letters AGRI. They select **Contains** as the type of match and enter AGRI as the text to be matched.

3. Click  (the **Search** button) to return a list of possible values.

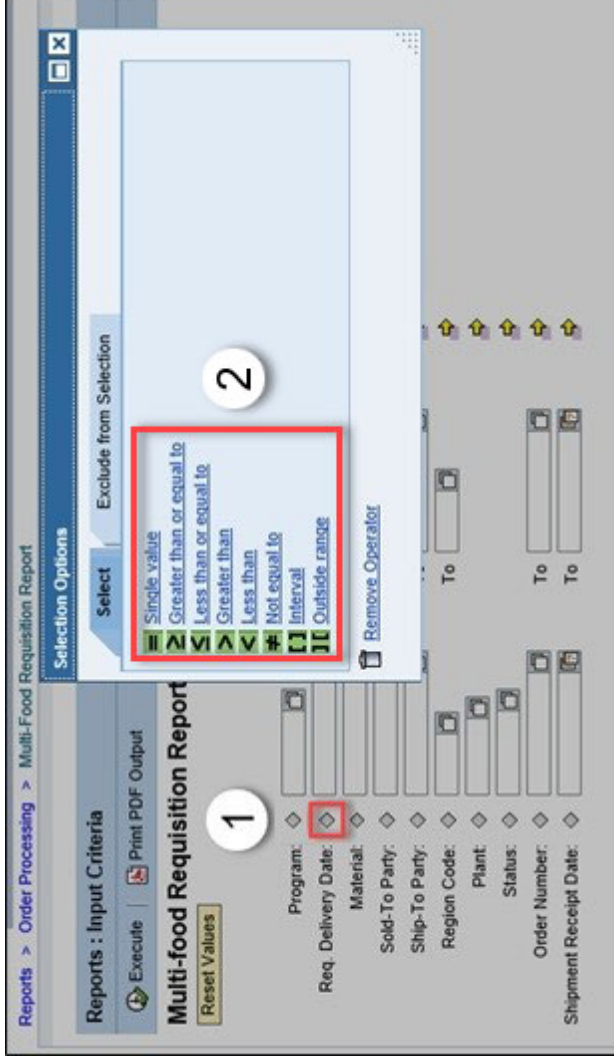
In this example, the results include all Ship-To parties containing "AGRI".

4. Click  (the **Select** button) to the left of the correct value.

In this example, the user selected AGRI-DAIRY (Customer #1000101).

5. The field is populated with the selected value.

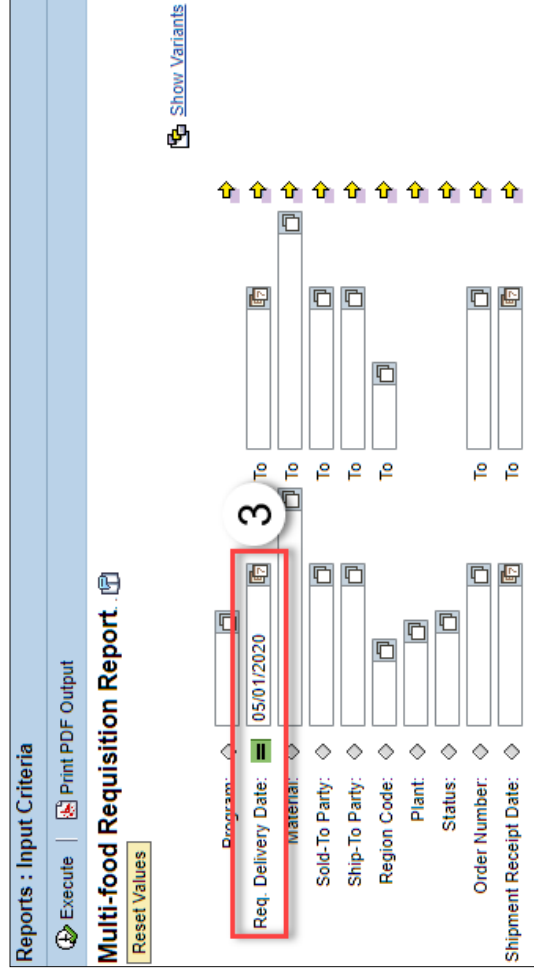
Reports: Input Criteria Screen



Selection Options to Select Records

The **Attribute** button allows the user to choose how to select records based on the entered value. By default, searches will look for a match equal to the entered value.

1. Click **Attribute** (the **Attribute** button) next a field to open the **Selection Options** window. The window defaults to the **Select** tab.
2. Click the hyperlink of the desired selection option.
In this example, **Greater than or equal to** (the **Single Value: Equal to** option) was selected to find records equal to the entered value for **Req. Delivery Date** field.
3. The selection option is displayed next to the field.
In this example, the **Greater than or equal to** (the **Single Value: Equal to** option) displays next to the **Req. Delivery Date** field. The generated report will display only results with a delivery date equal to the entered value of **05/01/2020**.



Note: Select **Remove Operator** (the **Delete Selection** option) to clear the selection option from the field.

Reports: Input Criteria Screen

Selection Options to Exclude Records

The (the **Attribute** button) allows the user to choose records to exclude from the search based on the entered value.

1. Click (the **Attribute** button) next a field to open the *Selection Options* window. The window defaults to the *Select* tab.
2. Select the *Exclude from Selection* tab to display exclusion options.
3. Click the hyperlink of the desired selection option.
In this example, (**Do not select: Equal to** option) was selected for **Status** field.
4. The selection option is displayed next to the field.

In this example, the (**Do not select: Equal to** option) displays next to the **Status** field. The generated report will exclude all results with a status of **E0002** (cancelled).

Note: Select **Remove Operator** (delete selection option) to clear the selection option from the field.

Reports: Input Criteria Screen

Advanced Options to Define a Range

Users can customize a range or multiple ranges of values for a field using Advanced Options. Ranges are described in a from/to format.

1. Click  (the **Advanced Options** button) to open the *Multiple Selection* window.

In this example, the user is entering a customized range for the **Req. Delivery Date** field.

2. Enter the beginning (low) value for the range in the **From** field.
In this example, **01/01/2020** was entered.

3. Enter the ending (high) value for the range in the **To** field.

In this example, **05/31/2020** was entered.

4. Click  (the **OK** button) to return to the report criteria selection screen.

5. Review the search criteria. For the fields that have a range defined by the multiple selection criteria, the  (the **Between** icon) displays.


In this example, the **Req. Delivery Date** field was populated with the entries made in the *Multiple Selection* window.



Reports: Input Criteria Screen

Create a Variant

Variants can be used to save frequently used search criteria, including search with wildcards (*).

1. Enter applicable search criteria in the **Reports: Input Selection** Screen.
2. Select **Show Variants**.
3. Enter the unique name of the search criteria in the **Variant** field.
4. Enter the description of the saved search criteria in the **Description** field.
5. Click  (the **Save** button) to save the variant.

The system displays a message *“The variant XYZ was successfully saved!”* Where XYZ represents the variant name.

Reports: Input Criteria Screen

Reports : Input Criteria

Execute | Print PDF Output

Multi-food Requisition Report.

Reset Values

Program:

Req. Delivery Date: To

Material: To

Sold-To Party: To

Ship-To Party: To

Region Code: To

Plant:

Status:

Order Number: To

Shipment Receipt Date: To

Show Variants

[Hide Variants](#)

Variant Maintenance

Variant:

Description:

Load Delete

Reports : Input Criteria

Execute | Print PDF Output

Multi-food Requisition Report.

Reset Values

Program:

Req. Delivery Date: To

Material: To

Sold-To Party: To

Ship-To Party: To

Region Code: To

Plant:

Status:

Order Number: To

Shipment Receipt Date: To

[Hide Variants](#)

Variant Maintenance

Variant:

Description:

Load Delete

Load a Variant

Variants can be used to apply previously saved search criteria, including search with wildcards (*).

1. Select **Show Variants**.
2. Enter the name of the variant being loaded in the **Variant** field. If the variant name is unknown, search by using (the **Matchcode** button) to locate the variant using known criteria.
3. Click **Load** (the **Load Variant** button) to load the variant.

The **Reports: Input Criteria Screen** displays with the search criteria populated according to the criteria saved in the variant.



Reports: Output Screen

The screenshot shows a report titled "Multi-food Requisition Report" with a table of data. Callouts 1 through 5 point to specific features: 1. Report title, 2. Print PDF Out button, 3. SO Item # column, 4. Delivery # column, and 5. Net Dollar Value column.

Batch Number	Date Received	Sales Order #	SO Item #	Delivery #	Del. Line Item	Linked Del. Item	Net Dollar Value
2829		1000408582	100	80017483	10		58.08
5915		1000408582	200	80017485	10		177.94
5953		1000408582	300	80017485	20		20.00
5915		1000408583	100				58.08
5953		1000408583	200	80017484	10		177.94
		1000408583	300	80017484	20		20.00

View the Report

The report output screen displays the results. The standard features of the report output screen are:

1. The name of the report.
2. The report view applied to the output.
3. The column headers, which often equate to field names on the report input screen, are organized with the records on individual rows.
4. Data may be available beyond the viewable screen. The inner scroll bar is used to scroll left and right within the report.
5. The report output screen may be larger than the viewable screen. The outer scroll bar is used to scroll left and right or up and down on the screen.

Report Output Screen

Multi-food Requisition Report

Go Back | Print PDF Output | Export

View: MULTI_FOOD_REQ |


Batch Number	Date Received	Sales Order #	Item #	Delivery #
2829	04/27/2020	Sort in Ascending Order	100	80017479
5915	04/27/2020	Sort in Descending Order	200	80017479
5953	04/27/2020	(All)	100	80017479
2829		(User-Defined Filter...)	200	80017478
5915		1000407504	300	80017478
5953		1000407505		80017478

Sort Columns

Users can sort columns in the report output in ascending or descending order. Ascending order will display all records alphabetically (A-Z) and from smallest to largest number. Descending order is in reverse.

1. Click on the column header to open a drop-down selection window.
2. Select from the available choices:
 - Sort in Ascending Order
 - Sort in Descending Order

Upon selection, the report output will display with the sort applied.

Note: Users can also set sort preferences by clicking  (the **Open Settings Dialog** button) (not shown in the example) in the upper right-hand corner of the report and selecting the *Sort* tab. If more than one sorting preference is entered users can also change the order in which these sorting rules are applied.

Report Output Screen

Multi-food Requisition Report.

Go Back | Print PDF Output

View: MULTI_FOOD_REQ | Export

Batch Number	Date Received	Sales Order #	SO Item #	Delivery #
2829	04/27/2020	Sort in Ascending Order	100	80017479
5915	04/27/2020	Sort in Descending Order	200	80017479
5953	04/27/2020	(All)	300	80017478
2829		(User-Defined Filter...)	200	80017478
5915		1000407504	300	80017478
5953		1000407505		80017478

Multi-food Requisition Report.

Go Back | Print PDF Output

View: MULTI_FOOD_REQ | Export

Batch Number	Date Received	Sales Order #	SO Item #	Delivery #
2829	04/27/2020	Sort in Ascending Order	100	80017479
5915	04/27/2020	Sort in Descending Order	200	80017479
5953	04/27/2020	(All)	300	80017479
2829		(User-Defined Filter...)	200	80017478
5915		1000407504	200	80017478
5953		1000407505	300	80017478

Filter Results

Users can apply a filter any column (field) to further narrow the results that are displayed. The user may define a new filter or select from a list of values.

1. Click on the column header to open a drop-down selection window.
2. To remove any previously applied filters for the selected column and display all records, select **(All)**.

In this example, the selection Sort in Ascending Order is removed by selecting All.

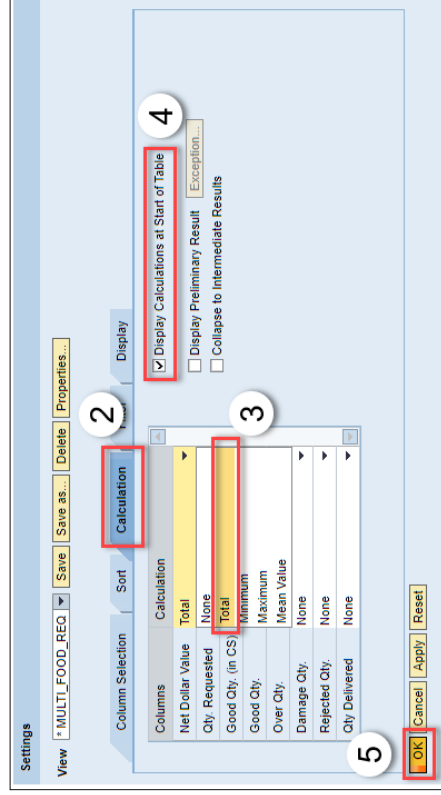
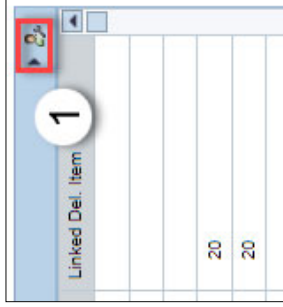
3. To filter using a single value, select an existing report value from the drop-down list.

4. To set up a custom filter for this field, select **(User-Defined Filter...)**. Select the values and type of match for the selected field in the *Custom Filter* window. [Wildcards](#) can be used.

Upon selection, the report output will display with the filter applied.

Note: Users can also set filters by clicking  (the **Open Settings Dialog** button) (not shown in this example) in the upper right-hand corner of the report and selecting the *Filter* tab.

Report Output Screen



Multi-food Requisition Report

View: MULTI_FOOD_REQ | Print PDF Output | Export

Batch Number	Date Received	Sales Order #	SO Item #	Delivery #	Del Line Item	Linked Del. Item	Net Dollar Value
2829	0427/2820	1000407505	100	80017479	10		58.08
5915	0427/2820	1000407505	200	80017479	20		177.94
5953	0427/2820	1000407505	300	80017479	30		20.00
2829	1000407504	1000407504	100	80017478	10		58.08
5915	1000407504	1000407504	200	80017478	20		177.94
5953	1000407504	1000407504	300	80017478	30		20.00
2829	1000408582	1000408582	100	80017465	10		58.08
5915	1000408582	1000408582	200	80017465	20		177.94
5953	1000408583	1000408583	300	80017465	30		20.00
5915	1000408583	1000408583	100	80017484	10		58.08
5953	1000408583	1000408583	300	80017484	30		177.94
							20.00
							1,024.06

Add Calculation for a Column

The user can calculate Total, Minimum, Maximum, or Mean Value for a given column in a report.

1. Click (the **Open Settings Dialog** button) in the upper right-hand corner of the report. The *Settings* window displays.
2. Select the *Calculation* tab.
3. In the **Calculation** column, select the drop-down arrow for the column to calculate. Select the type of calculation.

In this example **Total** is selected in the **Net Dollar Value** field.

4. Select the **Display Calculations at the Start of Table** checkbox to have the calculations display at the top of the table. This is optional; if the checkbox is not selected, the results will display at the bottom of the report.

In this example, the **Display Calculations at the Start of the Table** checkbox was selected.

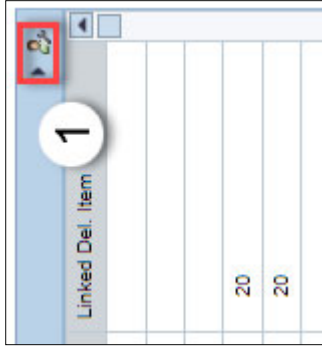
5. Click (the **OK** button) to apply the calculation to the report.

Note: To preview changes, click **Apply**. To exit without saving the changes, click **Cancel**. To restore all original settings, click **Reset**.

The calculated results display on the top-most line of the report.



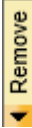

Note: Only the columns that can be analyzed with calculations are displayed on the *Calculation* tab.

Report Output Screen

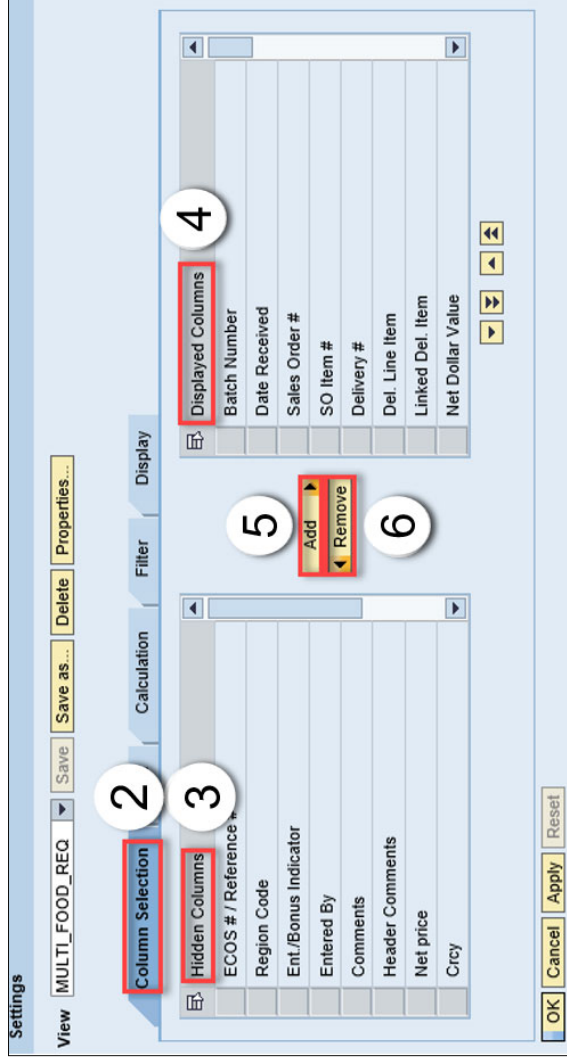


Add/Remove Columns

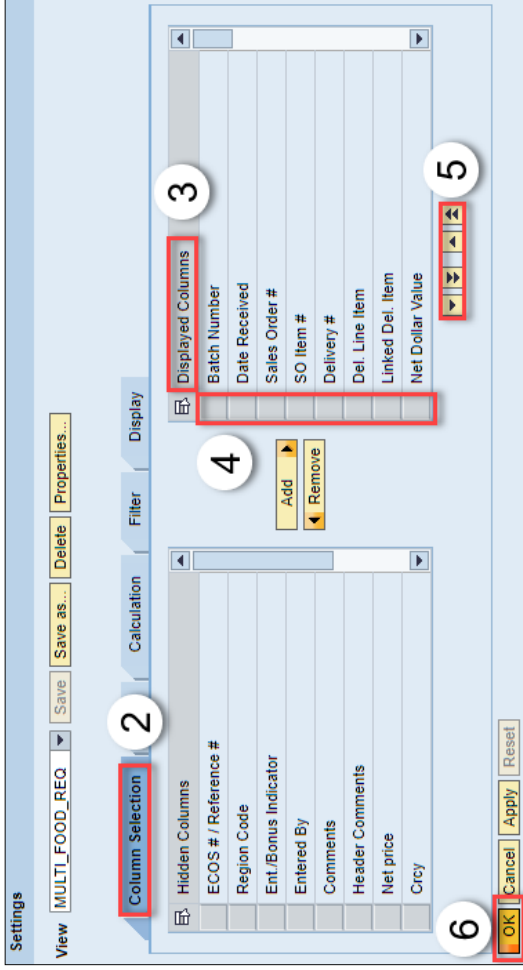
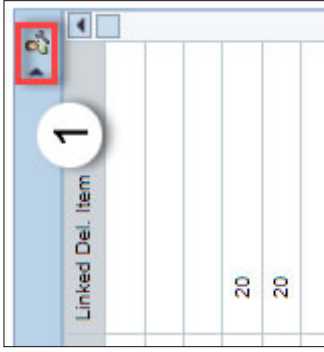
The user can add or remove columns in the report.

1. Click  (the **Open Settings Dialog** button) in the upper right-hand corner of the screen to display the *Settings* window.
2. Select the *Column Selection* tab.
3. The **Hidden Columns** table displays a list of available columns that are not currently displayed in the report.
4. The **Displayed Columns** table displays a list of columns that are displayed in the report and can be removed.
5. To add a column to the report, select the column name from the **Hidden Columns** table and click  (the **Add** button).
6. To remove a column from the report, select the column name from the **Displayed Columns** table and click  (the **Remove** button).
7. Click  (the **OK** button) to add or remove column from the report.

Note: To preview changes, click **Apply**. To exit without saving the changes, click **Cancel**. To restore all original settings, click **Reset**.



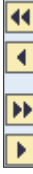



Report Output Screen



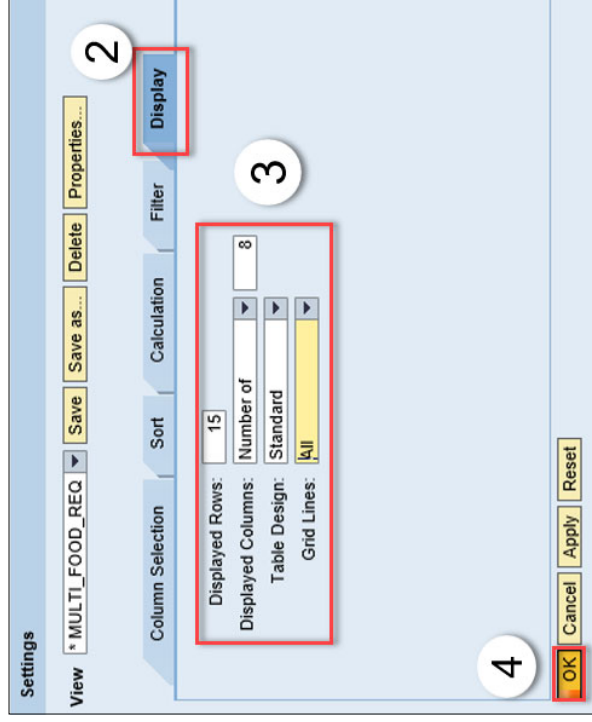
Move Columns

In the report table, users can drag and drop columns to change the order in which they appear. Alternatively, users can view and modify the position of columns from the Settings Window. The **Displayed Columns** table indicates the order in which the columns are displayed, left-to-right, in the report.

1. Click  (the **Open Settings Dialog** button) in the upper right-hand corner of the screen to display the *Settings* window.
2. Select the *Column Selection* tab.
3. The **Displayed Columns** table indicates the order in which columns are displayed, left to right, in the report.
4. Click  (the **Select** button) to the left of a column name to select it.
5. Use  (the **Move Item** buttons) to move a column up or down on the list to the desired position. Use the single arrow to move the column up or down one position. Use the double arrow to move the column to the top or bottom of the list.
6. Click  (the **OK** button) to apply the changes to the report.



Note: To preview changes, click **Apply**. To exit without saving the changes, click **Cancel**. To restore all original settings, click **Reset**.

Report Output Screen



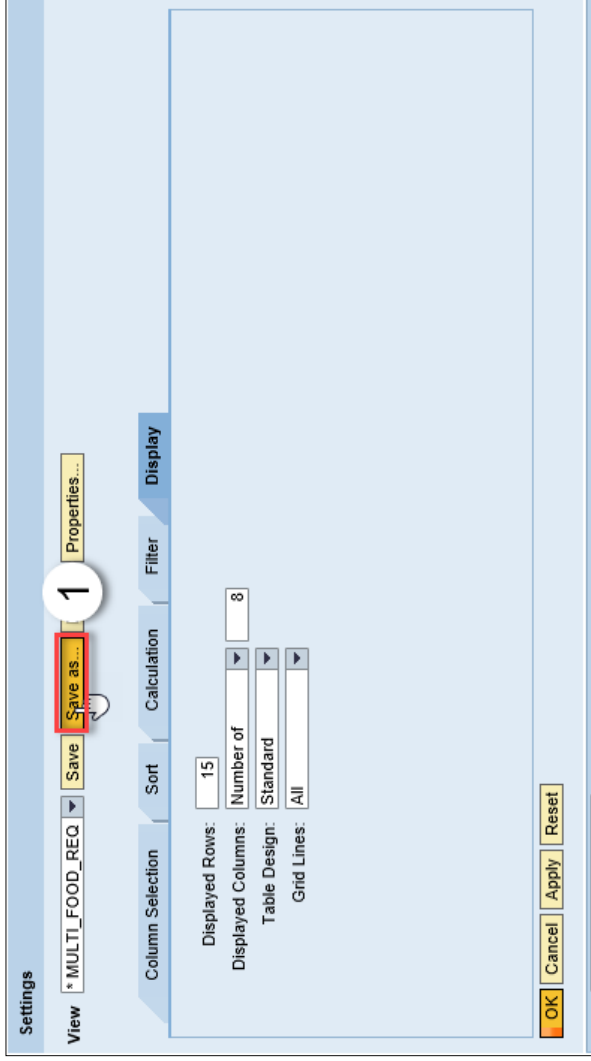
Update the Display

The *Display* tab in the **Settings** window allows the user to change the appearance of the report.

1. Click  (the **Open Settings Dialog** button) in the upper right-hand corner of the report. The *Settings* window displays.
2. Select the *Display* tab.
3. The following options are available for selection:
 - **Displayed Rows** indicates the number of rows to be displayed on the screen.
 - **Displayed Columns** indicates the number of columns to be displayed on the screen.
 - **Table Design** indicates the shading used in the table. Options include Alternating (transparent/tinted), Standard (all tinted), and Transparent. **Standard** is the default selection.
 - **Grid Lines** are visible borders within the table. Options include All, None, Vertically (only), and Horizontally (only).
4. Click  (the **OK** button) to apply updated display.

Note: To preview changes, click **Apply**. To exit without saving the changes, click **Cancel**. To restore all original settings, click **Reset**.

Settings Window



Save Custom Report View

Customized report settings for this report can be saved as a View for future use by the User. The view will not be available to other users.

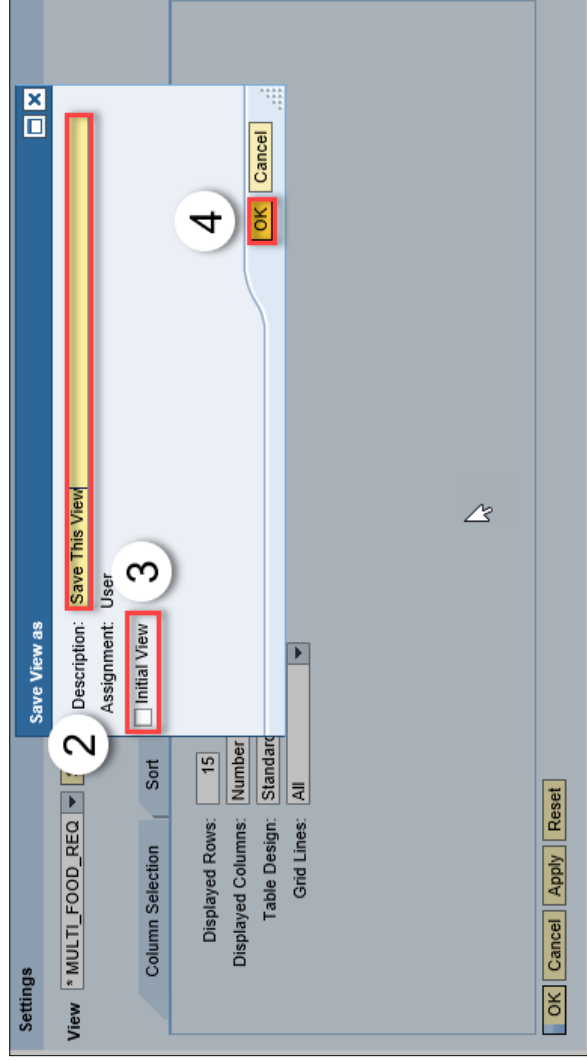
To save settings:

1. Click **Save as...** (the **Save As** button) in the **Settings** window. The **Save As** window displays.
2. Enter a view name in the **Description** field.

In this example, **Save This View** is entered.

3. Select the **Initial View** checkbox to default to this customized View each time the user executes this type of report. If the checkbox is not selected, the report will open with the existing default Views, which may be the system default or a previously set custom View.
4. Click **OK** (the **OK** button) to save the customized View.

Note: The View will be available for future sessions when the user is signed in to the same WBSCM account. Other user accounts (including alternate user accounts associated with the same eAuth ID or other users in the same organization) will not have access to the customized View.





Applying a Saved View

Multi-Food Requisition Report

Go Back | Print to PDF | Export

View: **MULTI_FOOD_REQ** | 1

Status	MULTI_FOOD_RCVD_SHIPMENT	Date Received
Order	MULTI_FOOD_REQ	01/04/2017
Order	MULTI_FOOD_TREND	01/05/2017
Order	VALUE_OF_COMM_MULTI_FOOD [Standard View]	
Order Received		01/05/2017
Order Received		01/05/2017
Order Received		01/05/2017

2

3

Apply Report View

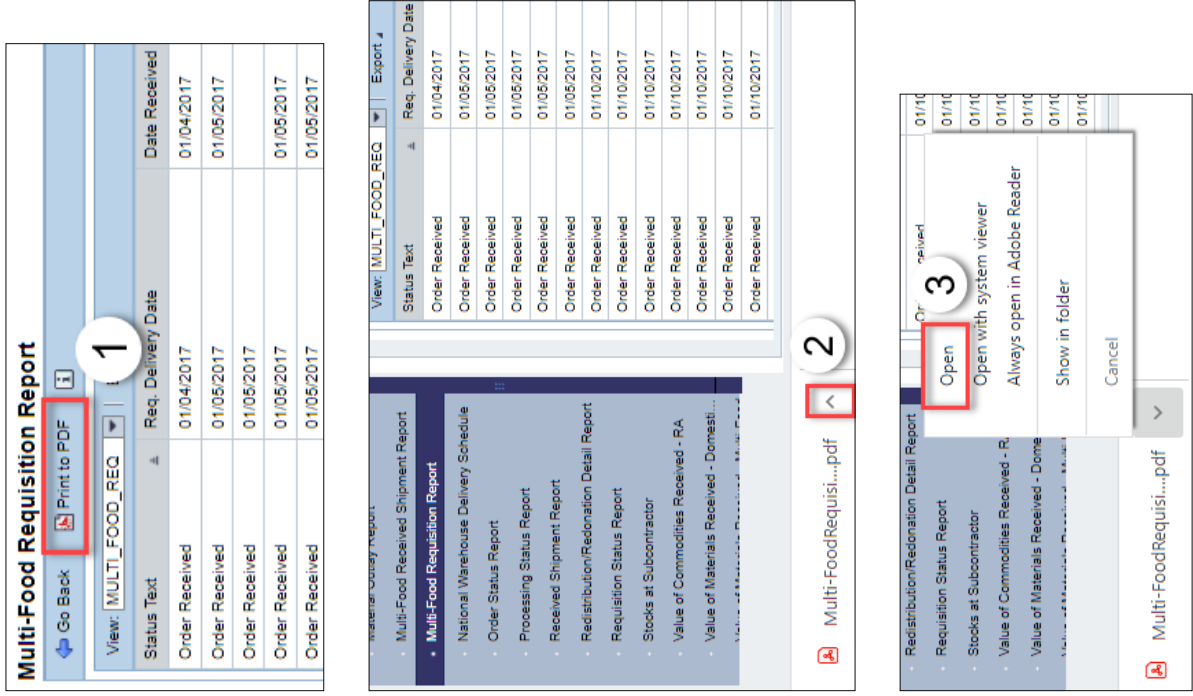
When a report is generated, it defaults to the most recent View. Users can select from available Views to change report settings.

1. Select the **View** drop-down list.
2. The current view setting is displayed as highlighted.
3. Select a different view from the current view on the list.

In this example, the **Multi_Food_Trend** option was selected.

The view will automatically be applied to the report.

Report Output Screen



Multi-Food Requisition Report

View: MULTI_FOOD_REQ | 1

Status Text	Req. Delivery Date	Date Received
Order Received	01/04/2017	01/04/2017
Order Received	01/05/2017	01/05/2017
Order Received	01/05/2017	01/05/2017
Order Received	01/05/2017	01/05/2017
Order Received	01/05/2017	01/05/2017

Multi-FoodRequisi....pdf | 2

3

Open

Open with system viewer

Always open in Adobe Reader

Show in folder

Cancel

Multi-FoodRequisi....pdf



Save Report Output as PDF

Reports can be saved to the user's computer in PDF format. The user can print the report after saving.

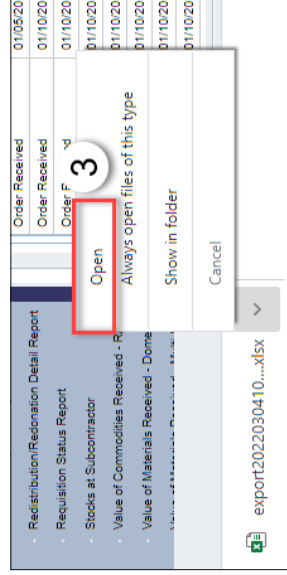
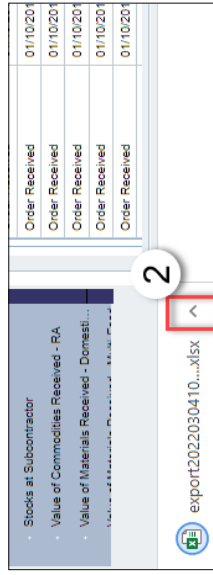
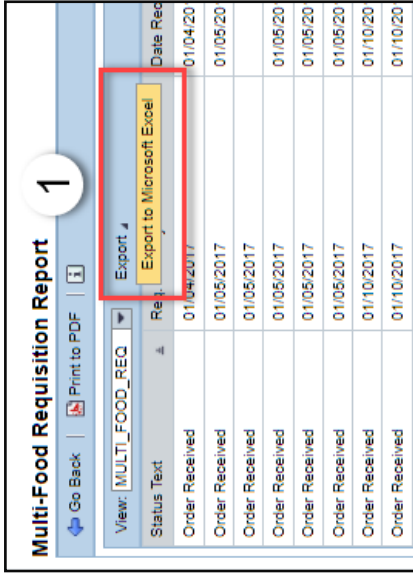
Note: PDF documents automatically open on a browser preview tab in Chrome. The user may update their browser settings to enable PDF file downloads. Refer to the [WBSCM Browser Settings and Helpful Tips Job Aid](#) for additional details. The instructions below review steps if the user has enabled PDF file downloads.

1. Click  (the **Print to PDF** button) to generate a PDF version of the report.

Note: PDF file download prompt appears at the bottom of the screen.

2. Click  (the **Arrow** button) to display a list of options.
3. Click  (the **Open** option) to open the PDF file.

Report Output Screen



Export Report Output as XLS

Reports can be exported to spreadsheet format.

To export a document, navigate to the appropriate WBSCM transaction. In this example, the **Multi-food Requisition Report** is selected.

1. Click  (the **Export** button) and select **Export to Microsoft Excel** from the drop-down.

Note: The button name will vary based on the transaction.

Note: A file download prompt displays at the bottom of the screen.

2. Click  (the **Arrow** button) to display a list of options.

3. Click  (the **Open** option) to open the Spreadsheet file.

Note: The user can select the **Always open files of this type** option to set as the default option.

Note: The file opens in a new window. Return to the browser to continue using WBSCM.

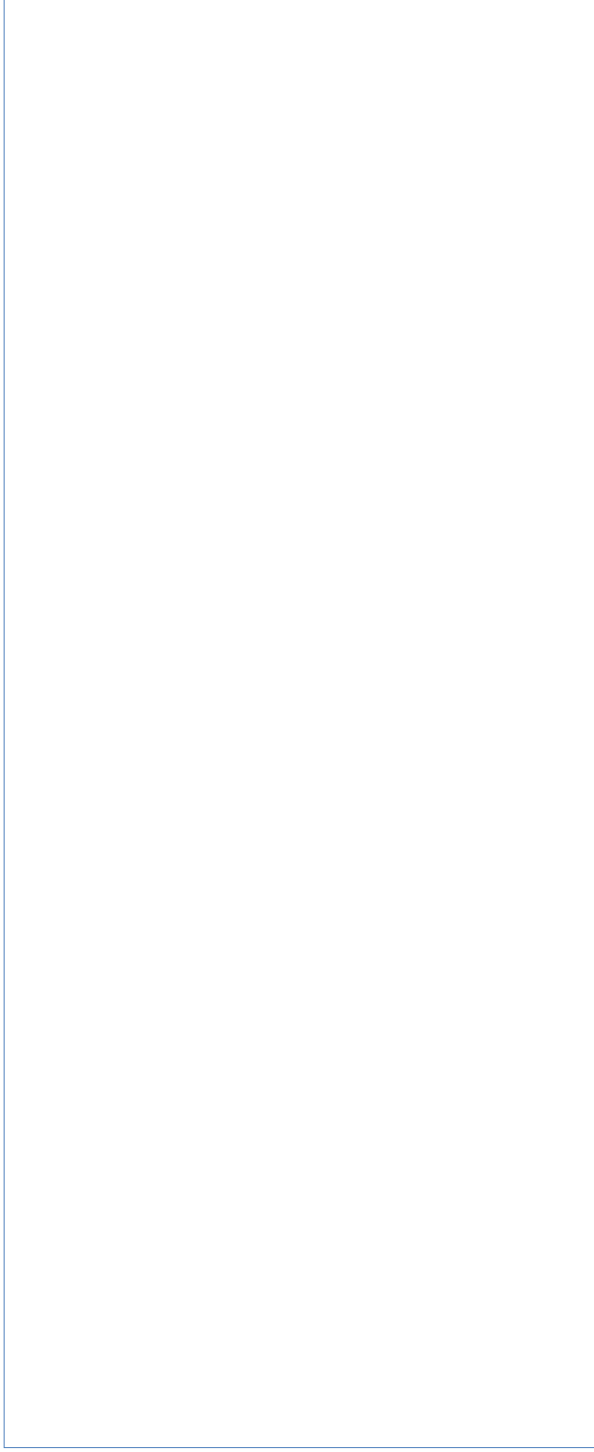
Job Aid
List of Materials

<p>Purpose</p> <p>Portal Navigation Path</p> <p>User Group / Role</p>	<p>This report will provide a list of materials currently available in WBSCM.</p> <p>Admin > Master Data > Material</p> <p>View Only role, that is all USDA and USAID users with access to WBSCM, plus SDA and RA users</p>
<p>Report Selection</p> <p>Screen</p>	<div data-bbox="365 430 1031 1669" style="border: 1px solid black; height: 590px; width: 410px;"></div> <ul style="list-style-type: none"> • Selection criteria are optional; you can execute the report without entering any selection criteria and all materials (including variable weight materials) currently available in WBSCM will be displayed. The report will display one record for each material per plant. If that material is available in more than 1 plant (i.e. National Warehouse Plants or Price Support Plants) then multiple records of the same material will be displayed. • You can filter by Material, Plant, Material Group, Purchasing Group, Created By, Display Inactive (Material inactive/deleted; default option is unchecked) and Include Variable Weight Material (default option is checked). • When the “Display Inactive” checkbox is checked, this will return both active and inactive materials in WBSCM.

Job Aid
List of Materials



Report Output



Note: To view full report, use the vertical scrollbar to view all records and the horizontal scrollbar to view additional columns. If the “Display Inactive” checkbox was selected, an X will appear in the **Inactive Material** column for those inactive materials in the report.

Use the **Print Version** to create a printable PDF output of the report. Use the **Export** button to generate the report in Microsoft Excel.

Description of key fields:

Material	WBSCM 6-digit numeric identifier
Material Descr.	Descriptive text of the material to up to 40 characters
Inactive Material	Material that is inactive in WBSCM at the material/base level, not at the plant level (<i>indicated with an X</i>)
PCIMS Number	This is the KC Commodity Group, Type & Pack size codes (<i>Only populated for material migrated from PCIMS</i>)
FNS Number	4 digit commodity code used prior to WBSCM that is either AXXX or BXXX (<i>Only populated for material migrated from PCIMS/ECOS</i>)
Core Number	Financial data element to be used for specific financial transactions (<i>Only populated for</i>

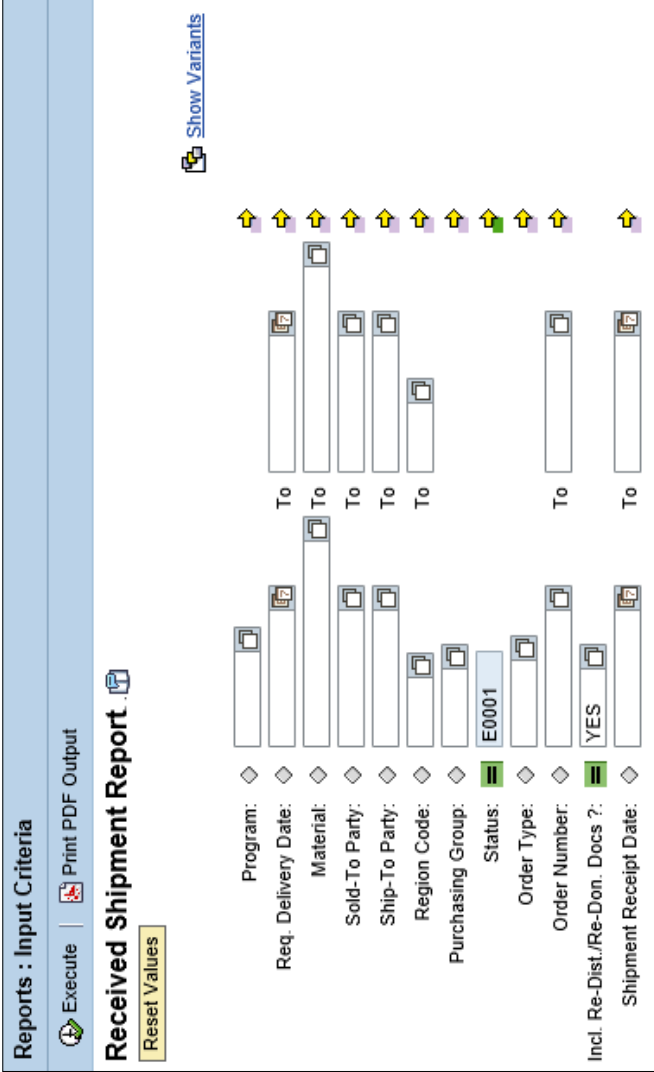


Job Aid
List of Materials

	<i>material migrated from PCIMS)</i>	
Base UoM	Lowest level tracking of a materials Unit of Measure	
No. Cases/Truck	The number of cases to fit a full truck	
Plant	<p>A storage location or statistical business partner ID. The plants are:</p> <p>Domestic:</p> <p>1000- DOMESTIC STATISTICAL 2000-NW AMERICOLD-SYRACUSE 2100-NW AMERICOLD-CARTHAGE 2200-NW PARIS BROTHERS-MO 2300-NW AMERICOLD-NAMPA</p> <p>International:</p> <p>1500-INTERNATIONAL STATISTICAL 4000-PP JACINTOPORT WAREHOUSE 4001-PP MIAMI WAREHOUSE 4100-PP DJIBOUTI WAREHOUSE 4101-PP COLOMBO WAREHOUSE 4102-PP DURBAN WAREHOUSE 4103-PP LOME WAREHOUSE 4104-PP MOMBASA WAREHOUSE 4105-PP DUBAI WAREHOUSE 4106-PP LAS PALMAS WAREHOUSE 4107-PP TANJUNG PELEPAS WAREHOUSE</p>	
Plant Descr.	Text of the Plant. FNS materials will be to a "Dummy Statistical plant" or a storage location such as a National Warehouse	
Material Group	<p>Used to group materials for reporting. A breakdown of these values are:</p> <p>10-AMS Livestock 20-AMS Fish 30-AMS Poultry 70-AMS Fruit & Veg 80-IPD Packaged 85-IDP Bulk</p>	
Material Grp. Descr.	Descriptive text to identify the specific material group	
Purchasing Group	<p>Identifies a USDA area the material will flow for purchasing. The groups are:</p> <p>110 AMS-FRUIT & Veg 120 AMS-Poultry 130 AMS-Livestock 210 FSA-Domestic 220 FSA-Dairy 230 Freight Domestic 240 CCC-Commodity 250 CCC - Admin 310 FSA-Intl Package 320 FSA-Intl Bulk 330 FSA-Intl Pkging Mtl 340 FSA-Intl General 350 FSA-Intl Services</p>	

Job Aid
List of Materials

360 Freight AID
 370 Freight FSA

Purch Grp. Descr.	Text to identify the Purchasing Group
Product Hierarchy	Numeric representation of the material. Break down on tab 'Prod Hierarchy'
Product Hier. Descr.	Text description of the hierarchy
Gross weight	Total weight of the Material including packaging
Net weight	Weight of the material itself
Weight UoM	The Unit of Measure the weight represents. Examples: Pounds, Kilograms, Metric Ton,
Weight of a Case	Net weight of one case
Weight of a Truck	Net weight of all cases to be loaded on a truck
Price of Material	The dollar value for the material. It will be based on when the material was last purchased by USDA on an average or on a Government Cost estimate if the material has not been purchased for a period of time
Currency	Represents which currency the cost value is based. This will always be US dollars
Price unit	This is the price per 1 or per 100, or per 1000.
Price Unit UoM	Represents the unit of measure the price unit is based. Examples could be; pound, kilograms, Metric ton
Price / Case	Total price for one case of the material
Price / Truck	Total price of one full truck load of the material
Variable Weight Material	Indicates if Material is variable weight (Yes/No)

Report Title	Received Shipment Report
Purpose	This report provides detail on any receipted domestic shipments that match the selection criteria.
Portal	Reports tab → Order Processing tab → Received Shipment Report link
Navigation Path	FNS, SDA/ITO, and Co-op Order Managers
Target Audience	
Report Selection Screen	 <p>Enter selection criteria using  (the Matchcode icon) to search and populate the fields or type directly into the fields.</p> <ul style="list-style-type: none"> • The user must enter at least one of the following search criteria: Req. Delivery Date, Order Number, or Shipment Receipt Date. • For Shipment Receipt Date, limit the date range (if applicable) to less than one year. • The Status field is pre-populated to include only orders that have been received in WBSCM. This cannot be changed. • The report automatically includes Re-Distribution/Re-Donation Documents unless Incl. Re-Dist./Re-Don.Docs? is changed to 'No'. <p>Click  (the Execute button) to apply selection criteria and generate the report.</p>



Received Shipment Report

Go Back | Print PDF Output

View: RCVD_SHIPMENT | Export

Sales Order #	SO Item #	Sold-To Party	Sold-To Name	Sold-To State	Ship-To Party	Ship-To Name	Ship-To City
5000303694	100	4000530	NC Dept. of Ag and Consumer Service	NC	5003166	CMS STORAGE & DISTRIBUTION	CHARLOTTE
5000305745		4000530		NC	5000047	WAKE COUNTY SCHOOLS	RALEIGH JQ
5000305751		4000530		NC	5002678	MCCAIN FOODS USA INC	PLOVER
5000305752		4000530		NC	5000047	WAKE COUNTY SCHOOLS	RALEIGH JQ
5000305901		4000530		NC	5002641	ZARTIC INC	SPRINGFIELD
	200	4000530		NC	5002669	TYSON FOODS INC	SOUTH HUTCHISON
	300	4000530		NC	5002678	MCCAIN FOODS USA INC	PLOVER
	400	4000530		NC	5002704	BOSCO'S PIZZA COMPANY	WARREN
	500	4000530		NC	5002731	BROOKWOOD FARMS INC	PRINCE WILLIAM

Report Output

Note: To view additional fields (columns), use the horizontal scrollbar; to view additional records (rows), use the vertical scrollbar.

Received Shipment Report

Go Back | Print PDF Output

View: RCVD_SHIPMENT | Export

Date received	Requested Qty.	Sales Unit	Var. Wt. Material?	Good Qty. (in CS)	Over Qty.	Damage Qty.
07/19/2019	990.000	CS	No	990.000	0.000	0.000
07/19/2019	990.000	CS	No	990.000	0.000	0.000
07/19/2019	990.000	CS	No	990.000	0.000	0.000
07/18/2019	990.000	CS	No	990.000	0.000	0.000
07/18/2019	990.000	CS	No	1,000.000	10.000	0.000
07/19/2019	990.000	CS	No	990.000	0.000	0.000
07/19/2019	600.000	CS	No	600.000	0.000	0.000
07/19/2019	390.000	CS	No	390.000	0.000	0.000
07/18/2019	990.000	CS	No	990.000	0.000	0.000




Report Output
(cont.)

The default View (**RCVD_SHIPMENT**) includes the following fields:

Fields 1 - 9	Fields 10 - 19	Fields 20 - 28	Fields 29 - 38	Fields 39 - 47
<ul style="list-style-type: none"> • Sales Order # • SO Item # • Sold-To Party • Sold-To Name • Sold-To State • Ship-To Party • Ship-To Name • Ship-To City • Ship-To State 	<ul style="list-style-type: none"> • Material • Material Desc. • Requested Del. Date • Date Received • Requested Qty. • Entered By • Comments • Order Type • Status Text • SO Item Category 	<ul style="list-style-type: none"> • Sales Unit • Var. Wt. Material? • Good Qty (in CS) [in cases] • Good Qty. • Over Qty. • Damage Qty. • Rejected Qty. • Received Qty. UoM • Mult. Rcpts exist? 	<ul style="list-style-type: none"> • PR Qty. • Statistical RX? • Purch. Requisition # • PR Item # • PR Base UoM • Purchase Order # • PO Line Item • PO Qty. • PR Base UoM • Purchase Order # 	<ul style="list-style-type: none"> • PO Line Item • PO Qty. • ASN # • ASN Qty. • Allocation # / Corr. • Vendor # • Vendor Name • Purchasing Group • Signed By

Note: The **ASN Qty** field displays updated quantity if the vendor has updated the ASN. For multiple ASNs, each quantity is separated by a semicolon. For orders that have been received with a missing ASN, the **Status Text** field will display the status of **Order Received**.

Users can create and save a customized layout via the  (the **Open Settings Dialog** button). Users may also select a different layout (default or previously saved) from the **View** drop-down list.

Click  **Print PDF Output** (the **Print PDF Output** button) to produce a formatted print-ready document (cannot be edited). Use **Export** (the **Export** button) to work with the report data in Microsoft Excel or a similar application.

Refer to the [Reporting Navigation](#) job aid for additional guidance.

Report Title	Multi-food Received Shipment Report
Purpose	This report provides information about multi-food orders that were shipped from a National Warehouse to a State Distributing Agency (SDA), Indian Tribal Organization (ITO), or Recipient Agency (RA) and match the selection criteria.
Portal Navigation Path	Reports tab → Order Processing tab → Multi-food Received Shipment Report link
Target Audience	FNS, SDA/ITO, and RA Order Managers; Co-op and National Warehouse View-Only
Report Selection Screen	<div data-bbox="472 1087 1015 1864"> <p>Reports : Input Criteria</p> <p>Execute Print PDF Output</p> <p>Multi-food Received Shipment Report.</p> <p>Reset Values Show Variants</p> <p>Program: <input type="text"/> <input type="text"/></p> <p>Req. Delivery Date: <input type="text"/> To <input type="text"/></p> <p>Material: <input type="text"/> To <input type="text"/></p> <p>Sold-To Party: <input type="text"/></p> <p>Ship-To Party: <input type="text"/></p> <p>Region Code: <input type="text"/> To <input type="text"/></p> <p>Plant: <input type="text"/></p> <p>Status: <input type="text" value="E0014"/></p> <p>Order Number: <input type="text"/> To <input type="text"/></p> <p>Shipment Receipt Date: <input type="text"/> To <input type="text"/></p> </div> <p>Enter at least one of the following search criteria: Req. Delivery Date, Order Number, Shipment Receipt Date.</p> <p>The Status field is pre-populated to ensure the results include only orders that have been received in WBSCM. This cannot be changed.</p> <p>The report considers business partner relationships. Unless search criteria identify a specific Sold-To Party or Ship-To Party, a user from a higher-level organization will see transactions for all associated business partners. For example, FNS users may see results for all organizations; SDA users may see transactions for all their RAs. If a user selects a specific Sold-To or Ship-To Party, then only the transactions for that business partner are displayed.</p> <p>Note: Users should limit date ranges to within one year when performing searches with the Shipment Receipt Date field.</p> <p>Click (the Execute button) to generate the results.</p>

Multi-food Received Shipment Report

Go Back | Print PDF Output

View: MULTI_FOOD_RC... | Export

Sales Order #	SO Item #	Delivery #	Del. Line Item	Linked Del. Item	Sold-To Party	Sold-To Name	Sold-to State
1000257439	200	80038462	20		4000578	TX Dept. of Agriculture	TX
	300	80038462	30		4000578	TX Dept. of Agriculture	TX
	400	80038462	40		4000578	TX Dept. of Agriculture	TX
	500	80038462	50		4000578	TX Dept. of Agriculture	TX

Report Output

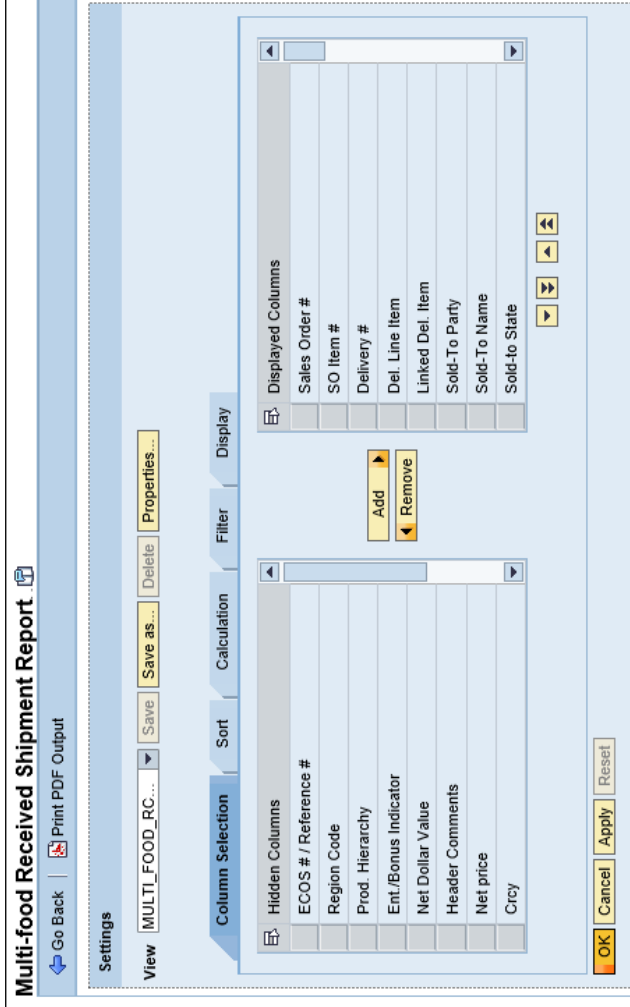
Note: To view additional fields (columns), use the horizontal scrollbar; to view additional records (rows), use the vertical scrollbar.

To select a different View and apply the pre-determined display settings to this report, click **View** (the **View**: dropdown arrow) to select a different view with pre-determined values, sort, calculation, filter, or display.

To modify the report output, use the **Open Settings Dialog** icon. Remember to save the customized visible fields, sorting, calculations, filters, and other display options as a new View to conveniently apply the same settings to this report in the future.

Click **Export** (the **Export** button) to export the report to a Microsoft Excel file.

Note: The **Print PDF Output** (The **Print PDF Output** button) produces a formatted print-ready document. The contents of the PDF (fields, field sequence, sort order, etc.) cannot be changed.



Report Output Settings Screen

- Select **Column Selection** (the **Column Selection** tab) to add/remove columns and change the sequence of the displayed columns as desired by selecting the field name and clicking up and down icons.
- Select **Sort** (the **Sort** tab) to sort the results by specified field and direction.
- Select **Calculation** (the **Calculation** tab) to insert a calculated value based on available report fields.
- Select **Filter** (the **Filter** tab) to apply filter(s) to the report.
- Click **Save as...** (the **Save as...** button) to save the selections as a new **View**. In the save prompt window, enter a descriptive name.



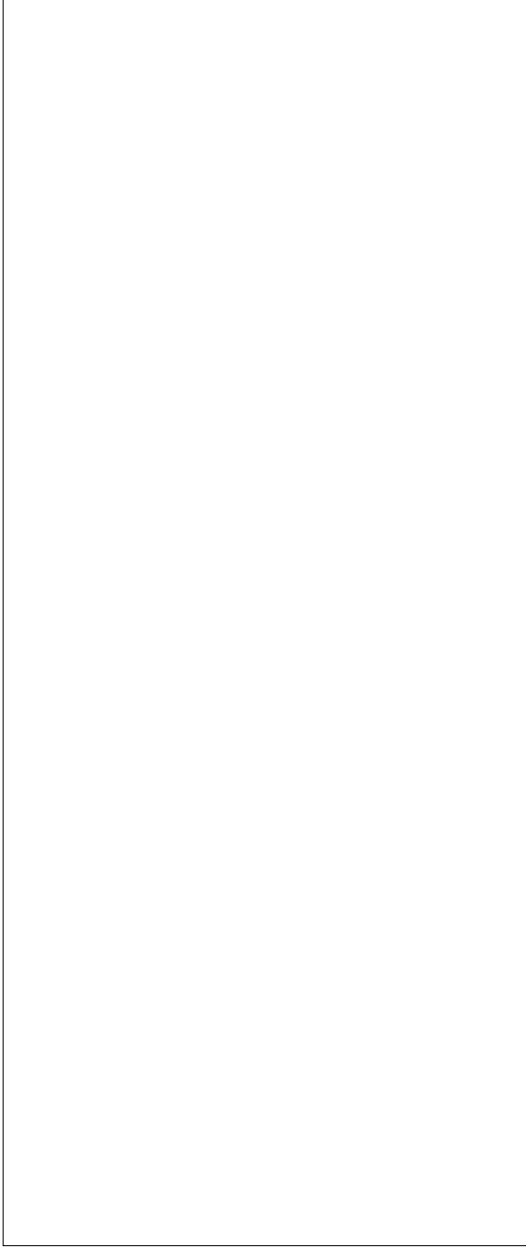
- Click **OK** (the **OK** button) to go back to the previous screen.

Once the criteria have been selected, click **Apply** (the **Apply** button) to generate the results.

Job Aid
Value of Materials Received – Domestic & Price Support

<p>Purpose</p>	<p>This report provides detail on the status, average cost, and value of orders that match your selection criteria.</p>
<p>Portal Navigation</p>	<p>Reports tab > Order Processing tab > Value of Materials Received - Domestic & Price Support link</p>
<p>Path</p>	<p>FNS and SDA/ITO Order Managers</p>
<p>Target Audience</p>	<div data-bbox="365 924 933 1732" style="border: 1px solid black; height: 385px; width: 350px; margin: 0 auto;"></div> <p>You must enter at least one of the following search criteria: Requisition Delivery Date, Order Number, or Shipment Receipt Date.</p> <p>Note: Users need to limit date ranges to within one year when performing searches with the Shipment Receipt Date field.</p> <p>The Status field is pre-populated to ensure your results include only orders that have been received in WBSCM. This cannot be changed.</p> <p>The report automatically includes the Re-Distribution/Re-Donation Documents. If you wish to change this, you may change the Incl. Re-Dist./Re-Don.Docs? field to NO.</p> <p>When you have finished entering criteria, click (the Execute button), or press the Enter key on your keyboard to generate results.</p>

Report Output



Note: To view additional fields (columns), use the horizontal scrollbar; to view additional records (rows), use the vertical scrollbar.

The default View (VALUE_OF_COMM_DOMESTIC) includes the following fields:

- Sold-To Party
- Sold-To Name
- Sold-To State
- Ship-To Party
- Ship-To Name
- Ship-To City
- Ship-To State
- Program
- Material
- Material Desc.
- Sales Unit
- Requested Qty.
- Net Dollar Value
- Entit/Bonus Indicato
- Date Received
- Status Text
- Sales Order #
- SO Item #

To select a different View and apply the pre-determined display settings to this report, click **View:** dropdown arrow). (the

To modify the report output, use the (the **Open Settings Dialog** icon). Save your customized visible fields, sorting,

calculations, filters, and other display options as a new View to conveniently apply the same settings to this report in the future.

- Select (the **Column Selection** tab) to add/remove columns and change the sequence of the displayed columns as desired by selecting the field name and clicking up and down icons.
- Select (the **Sort** tab) to sort the results by specified field and direction.
- Select (the **Calculation** tab) to insert a calculated value based on available report fields.
- Select (the **Filter** tab) to apply filter(s) to your report.

Once the criteria have been selected, click (the **Apply** button) to generate the results.

Click (the **Save as...** button) to save your selections as a new **View**. In the save prompt window, enter a descriptive name. Click (the **OK** button) to go back to the previous screen.

Note: The (The **Print PDF Output** button) produces a formatted print-ready document. The

Job Aid
Value of Materials Received – Domestic & Price Support

contents of the PDF (fields, field sequence, sort order, etc.) cannot be changed.

Click (the **Export** button) to export the report to a Microsoft Excel file.

<p>Report Title</p>	<p>Value of Commodities Received – RA Report</p>
<p>Purpose</p>	<p>This report provides detail on the value of commodities received that matched the selection criteria.</p>
<p>Portal</p>	<p>Reports tab → Order Processing tab → Value of Commodities Received – RA link</p>
<p>Navigation Path</p>	<p>FNS, SDA/ITO, and RA Order Managers; Co-op View-Only</p>
<p>Target Audience</p>	<div data-bbox="397 646 878 1728"> <p>Reports : Input Criteria</p> <p> Execute Print PDF Output</p> <p>Value of Commodities Received - RA </p> <p> Show Variants</p> <p>Program: <input type="text"/> </p> <p>Shipment Receipt Date: <input type="text"/> To <input type="text"/> </p> <p>Req. Delivery Date: <input type="text"/> To <input type="text"/> </p> <p>Material: <input type="text"/> To <input type="text"/> </p> <p>Sold-To Party: <input type="text"/> </p> <p>Ship-To Party: <input type="text"/> </p> </div> <p>Enter selection criteria using (the Matchcode icon) to search and populate the fields or type directly into the fields.</p> <ul style="list-style-type: none"> • The user must enter at least one of the following search criteria: Shipment Receipt Date or Req. Delivery Date. • Limit the date range (if applicable) to less than one year. • Selecting multiple criteria will narrow the search and result in faster report output. <p>Click Execute (the Execute button) to apply selection criteria and generate the report.</p>

Value of Commodities Received - RA

Go Back | Print PDF Output | Export

View: VAL_COMM_RCV... | Export

Req/Redist. Doc. Type	Req/Redist. Order #	Req/Redist. Item #	Req/Redist. Status	Sold-To Party	Sold-To Name	RA ID	Ship-To Party
ZREQ	1000135649	100	Approved by SDA	4000621	ABC School	19999	5000300
	1000135650		Approved by SDA	4000621		19999	5000300
	1000135651		Approved by SDA	4000621		19999	5000300
	1000135715	8800	Approved by SDA	4000621		19999	5002401
		9900	Approved by SDA	4000621		19999	5000300

Note: To view additional fields (columns), use the horizontal scrollbar; to view additional records (rows), use the vertical scrollbar.

The default View (**VAL_COMM_RCVD_RA**) includes the following fields:

Fields 1 – 6	Fields 7 – 12	Fields 13 – 17	Fields 18 – 21	Fields 22 – 26
<ul style="list-style-type: none"> Req/Redist. Doc. Type Req/Redist. Order # Req/Redist. Item # Req/Redist. Status Sold-To Party Sold-To Name 	<ul style="list-style-type: none"> RA ID Ship-To Party Ship-To Name Material Material Desc. 	<ul style="list-style-type: none"> Prod. Hierarchy Requested Del. Date Date Received Program Requested Qty. 	<ul style="list-style-type: none"> Entitlement/Bonus Ind Sales Unit: Net Dollar Value Cost/ LB Sales Order Status 	<ul style="list-style-type: none"> Purchase Order # PO Item # ECOS # / Reference # Sales Order # Sales Order Itm #

Report Output

Note: For orders that have been received with a missing ASN, the **Sales Order Status** field will display the status of **Order Received**.

To modify the report output, use the (the **Open Settings Dialog** icon). Save the customized visible fields, sorting, calculations, filters, and other display options as a new View to conveniently apply the same settings to this report in the future.

Users can create and save a customized layout via the (the **Open Settings Dialog** button). Users may also select a different layout (default or previously saved) from the **View** drop-down list.

Click (the **Print PDF Output** button) to produce a formatted print-ready document (cannot be edited). Use (the **Export** button) to work with the report data in Microsoft Excel or a similar application.

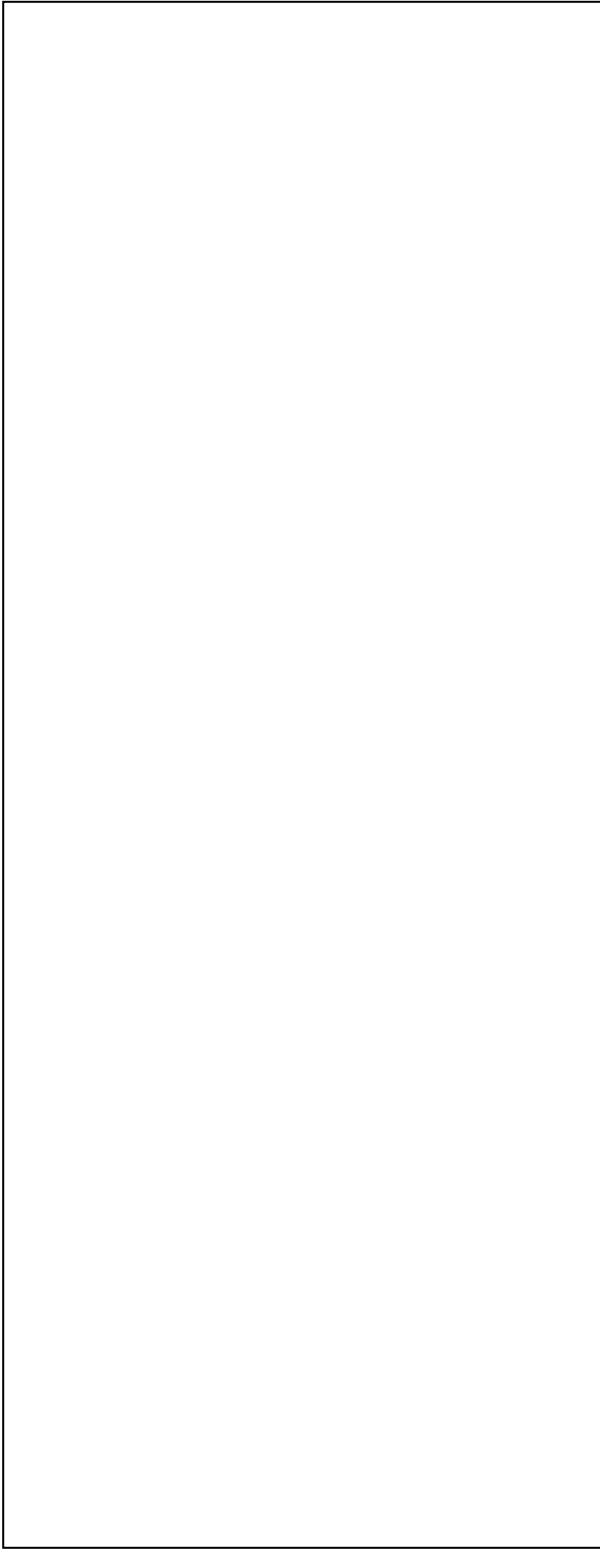
Refer to the [Reporting Navigation](#) job aid for additional guidance.

Job Aid
Value of Materials Received - Multi-Food

<p>Purpose</p> <p>Portal Navigation Path</p> <p>Target Audience</p>	<p>This report shows Multi-Food Requisitions by SDA/RA and the net dollar value of the orders received.</p> <p>Reports tab > Order Processing tab > Value of Materials Received – Multi-Food link</p> <p>FNS, SDA/ITO and RA Order Managers and Co-op</p>
<p>Report Selection Screen</p>	<p>You must enter at least one of the following search criteria: Req. Delivery Date, Order Number, or Shipment Receipt Date.</p> <p>Note: Users need to limit date ranges to within one year when performing searches with the Shipment Receipt Date field.</p> <p>The report considers business partner relationships. If a user assigned to a higher-level organization does not specify a Sold-To Party or Ship-To Party, transactions for all business partners are displayed. For example, FNS users may see results for all business partners; SDA users may see transactions for all their RAs. If the user selects a specific Sold-To Party or Ship-To Party, only the transactions for that business partner are displayed.</p> <p>The Status field is pre-populated to ensure your results include only orders that have been received in WBSCM. This cannot be changed.</p> <p>When you have finished entering criteria, click (the Execute button) to generate results.</p>

Job Aid
Value of Materials Received - Multi-Food

Report Output



Note: To view additional fields (columns), use the horizontal scrollbar; to view additional records (rows), use the vertical scrollbar. The results in the “VALUE_OF_COMM_MULTI_FOOD” view (the default view when you enter this report) include the following fields:

The default View (VALUE_OF_COMM_MULTI_FOOD) includes the following fields:

- Sales Order #
- SO Item #
- Plant Desc
- Program
- Sold-To Party
- Sold-To Name
- Sold-to State
- Ship-To Party
- Ship-To Name
- Ship-To City
- Ship-to State
- Material
- Material Desc.
- Prod. Hierarchy
- Req. Delivery Date
- Qty. Requested
- Date Received
- Batch Number
- Var. Wt. Material?
- Good Qty. (in CS) [in cases]
- Good Qty.
- Rec. Qty UoM
- Mult. Rcpts exist?
- Ent./Bonus Indicator
- Status Text
- SO Item Category
- Signed By
- Qty Delivered

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- Delivery #
- Del. Line Item
- Linked Del. Item
- UoM
- Net Dollar Value
- Over Qty.
- Damage Qty.
- Qty Del. UoM

To select a different View and apply the pre-determined display settings to this report, click (the **View:** dropdown arrow).

To modify the report output, use the (the **Open Settings Dialog** icon). Save your customized visible fields, sorting, calculations, filters, and other display options as a new View to conveniently apply the same settings to this report in the future.

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- Select (the **Column Selection** tab) to add/remove columns and change the sequence of the displayed columns as desired by selecting the field name and clicking up and down icons.
- Select (the **Sort** tab) to sort the results by specified field and direction.
- Select (the **Calculation** tab) to insert a calculated value based on available report fields.
- Select (the **Filter** tab) to apply filter(s) to your report.

Once the criteria have been selected, click (the **Apply** button) to generate the results.

Click (the **Save as...** button) to save your selections as a new **View**. In the save prompt window, enter a descriptive name. Click (the **OK** button) to go back to the previous screen.

Note: The (The **Print PDF Output** button) produces a formatted print-ready document. The contents of the PDF (fields, field sequence, sort order, etc.) cannot be changed.

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