



## PROCESS OVERVIEW

### Purpose

The purpose of this transaction is to create a Recipient Agency. A Recipient Agency (RA) is a domestic customer organization that has access to place orders in WBSCM. RA organizations are created by SDA (State Distributing Agency) Org Admins. The purpose of this transaction is to create an RA organization in WBSCM. This includes adding contact information for the organization, and assigning business partners and programs to the organization.

### Process Trigger

Perform this transaction when you wish to create a Recipient Agency (RA) organization in WBSCM.

### Prerequisites

- State Distributing Agency (SDA) must exist.

### Portal Path

Follow the Portal path below to complete this transaction:

- Select **Admin** tab → **Organization Maintenance** folder → **Maintain Organization** link → **Create RA Organization** link to go to the *Create RA Organization* screen.

### Tips and Tricks

- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
  - A Conditional field: an entry that becomes required as a result of entering something previous to it, which then deems it required
  - An Optional field: you may enter information in an optional field, but an entry is not required for the completion of the transaction
- Refer to WBSCM Portal Basic Navigation course for tips on creating favorites, perform searches, etc.

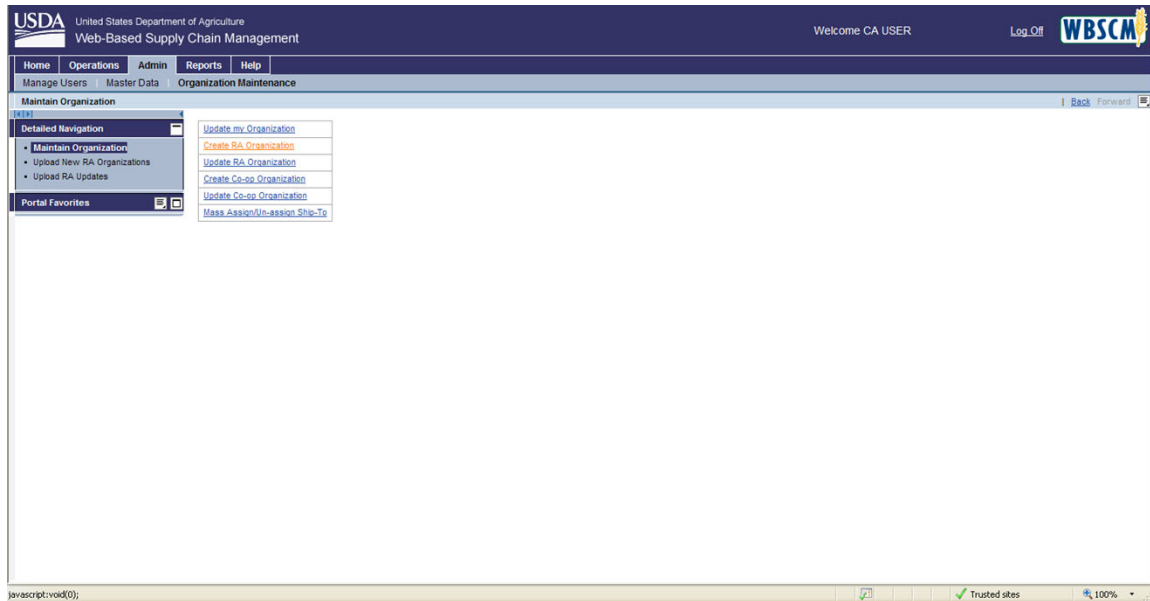
### Reminders

- Remember to check your work
- Refer to the Help Option (to the right of the screen) in the Portal for further assistance.

## PROCEDURE

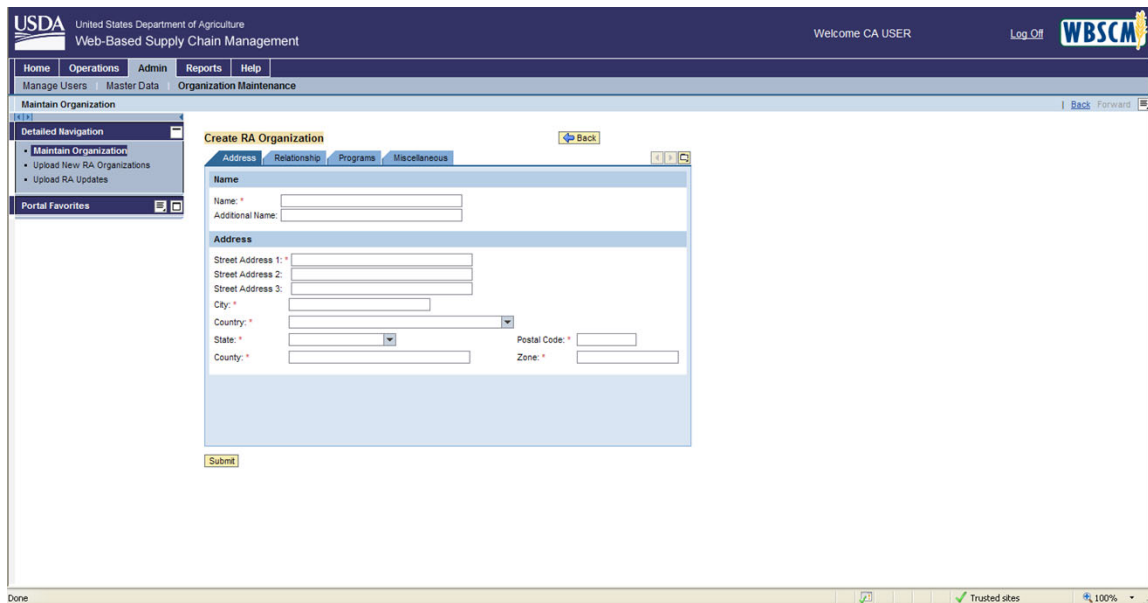
1. Start the transaction using the Portal path. Select **Admin** tab → **Organization Maintenance** folder → **Maintain Organization** link → **Create RA Organization**

### Maintain Organization Screen



2. Click [Create RA Organization](#) (the **Create RA Organization** button) to create a new RA Organization.

### Create RA Organization Screen



3. In the **Name** field, click  (the **text box**) to enter name of the RA.



(Note) Populate all required fields denoted by an asterisk. Enter required information on each tab *before* clicking the Submit button. After you have entered information on the Address, Relationship, Programs, and Miscellaneous tabs, click the **Submit** button.



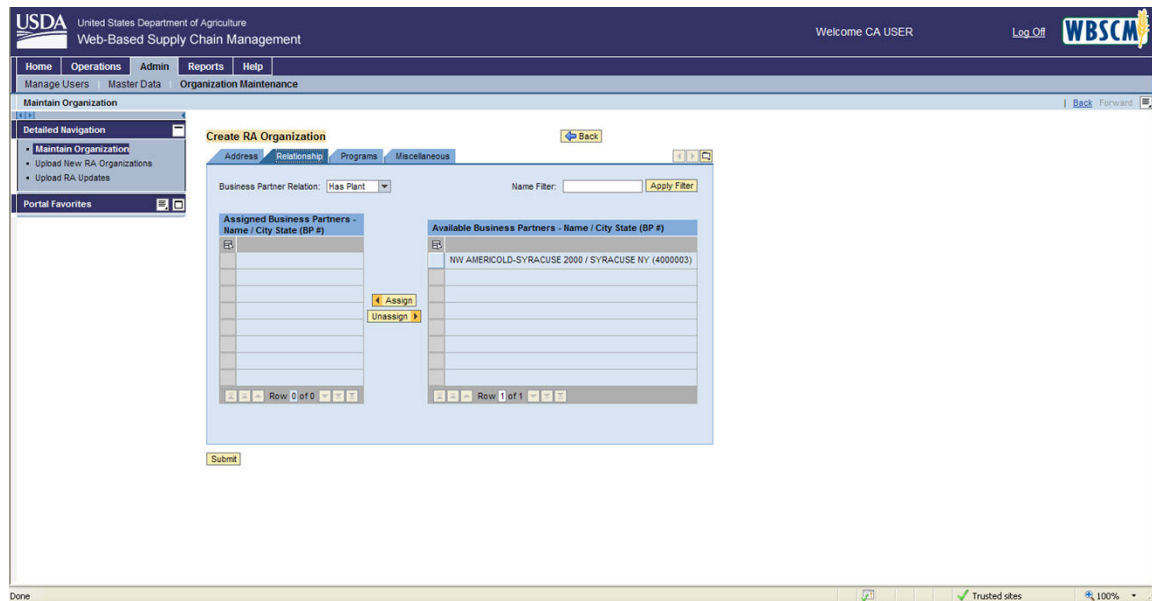
Work Instruction  
Create Recipient Agency (RA)

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

Field	R/O/C	Description
Name: *	R	Name of the Recipient Agency Organization <b>Example:</b> Riverside RA
Street Address 1: *	R	Street address of the RA's headquarters <b>Example:</b> 1111 Riverside Dr.
City: *	R	City of the RA's headquarters <b>Example:</b> Riverdale
Country: *	R	Name of the country where the RA is located. Typically, USA unless it is a domestic offshore location. <b>Example:</b> USA
State:*	R	State where RA is located. <b>Example:</b> California
Postal Code:*	R	A zip code for the RA's location <b>Example:</b> 23232
Zone:*	R	Zone where the RA is located. Zone 1 is NERO (Northeast Regional Office). Zone 2 is MARO (Mid-Atlantic Regional Office). Zone 3 is SERO (Southeast Regional Office). Zone 4 is MWRQ (Midwest Regional Office). Zone 5 is SWRO (Southwest Regional Office). Zone 6 is MPRO (Mountain Plains Regional Office). Zone 7 is WRO (Western Regional Office). Zone 8 is HQ (Headquarters). The RA should be assigned to the same zone as its SDA, so if you are an SDA Org Admin creating this new RA, you should populate this field with your zone number. <b>Example:</b> 4

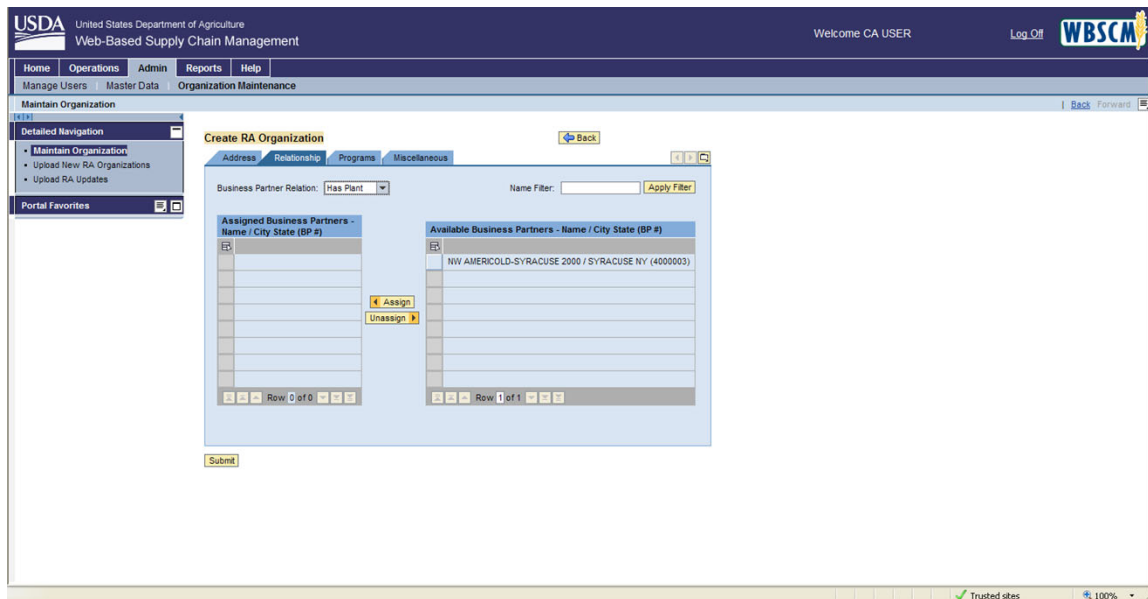


## Create RA Organization Screen



5. Click **Relationship** (the **Relationship** tab). This is the tab where you can assign relationships such as plants, and ship-to locations to the RA.

## Create RA Organization Screen



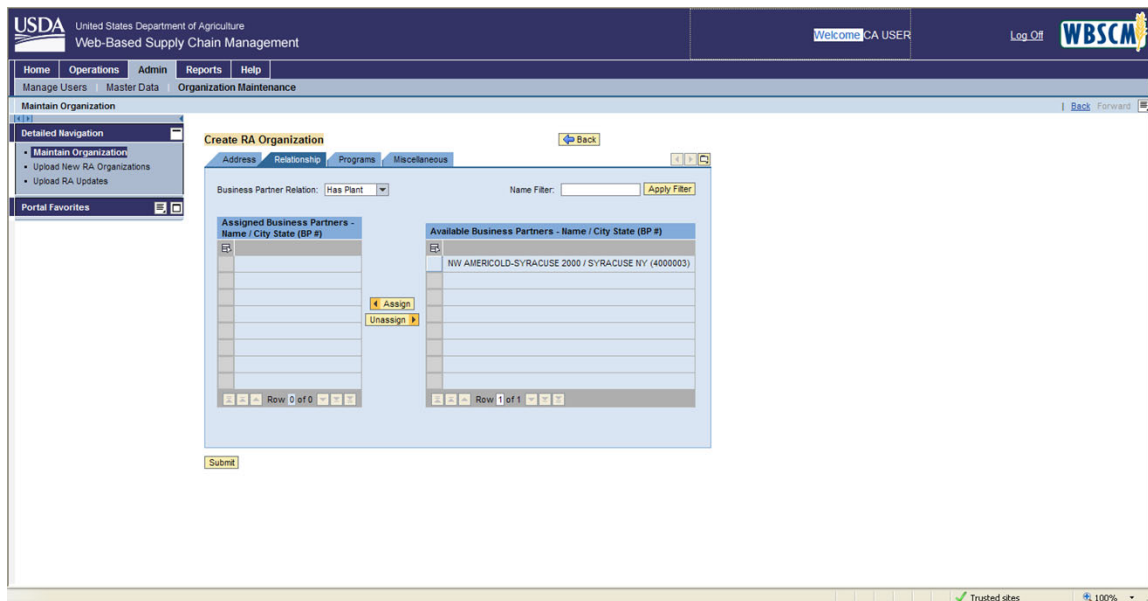
6. In the **Business Partner Relation** field, click  (the **Dropdown** button) to begin maintaining the business partner relations for the RA.




(Note) Select the **Has Plant** from the dropdown to choose the option when the business partner has a National Warehouse location that needs to be added. The options you will be given for possible National Warehouse locations are those assigned to the SDA.

Select the **Has Ship-To** to choose the option when the business partner has a Ship-To location that needs to be added. This could include any delivery locations for goods. By adding this information, the new Ship-To address will be selectable when the RA is creating a requisition and needs to choose a delivery location.

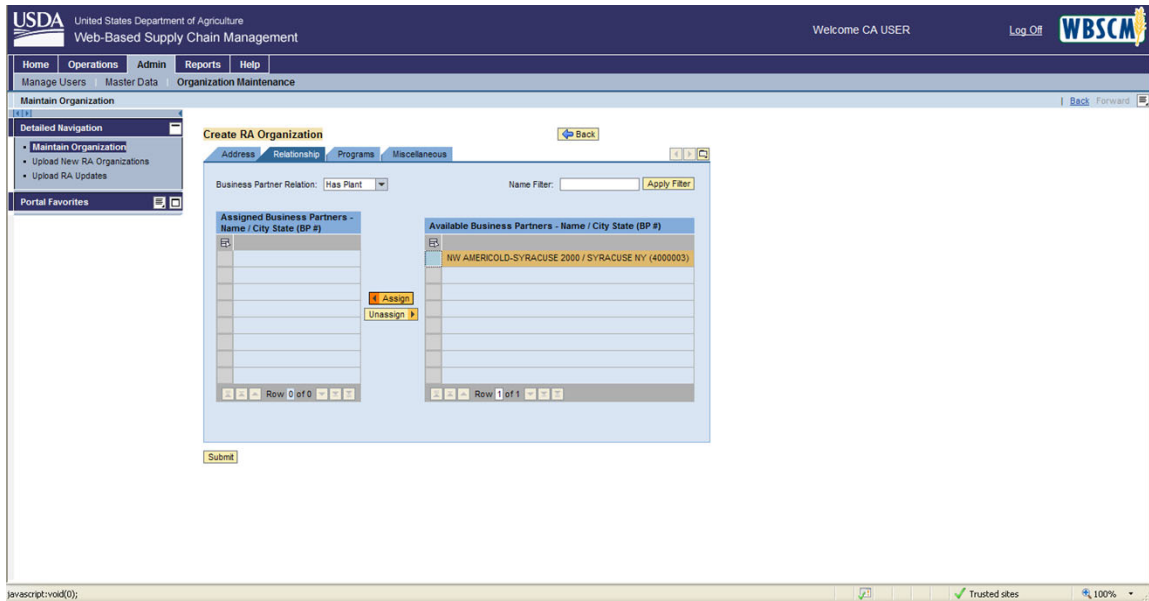
## Create RA Organization Screen



The screenshot displays the 'Create RA Organization' interface. At the top, the USDA logo and 'Web-Based Supply Chain Management' are visible, along with a 'Welcome CA USER' message and a 'Log Off' button. The navigation menu includes 'Home', 'Operations', 'Admin', 'Reports', and 'Help'. The main content area is titled 'Create RA Organization' and features tabs for 'Address', 'Relationship', 'Programs', and 'Miscellaneous'. A 'Business Partner Relation' dropdown is set to 'Has Plant', and a 'Name Filter' field is present. Below these are two tables: 'Assigned Business Partners' and 'Available Business Partners'. The 'Available Business Partners' table has one row highlighted with a blue box, containing the text 'NW AMERICOLD-SYRACUSE 2000 / SYRACUSE NY (4000003)'. A 'Submit' button is located at the bottom of the screen.

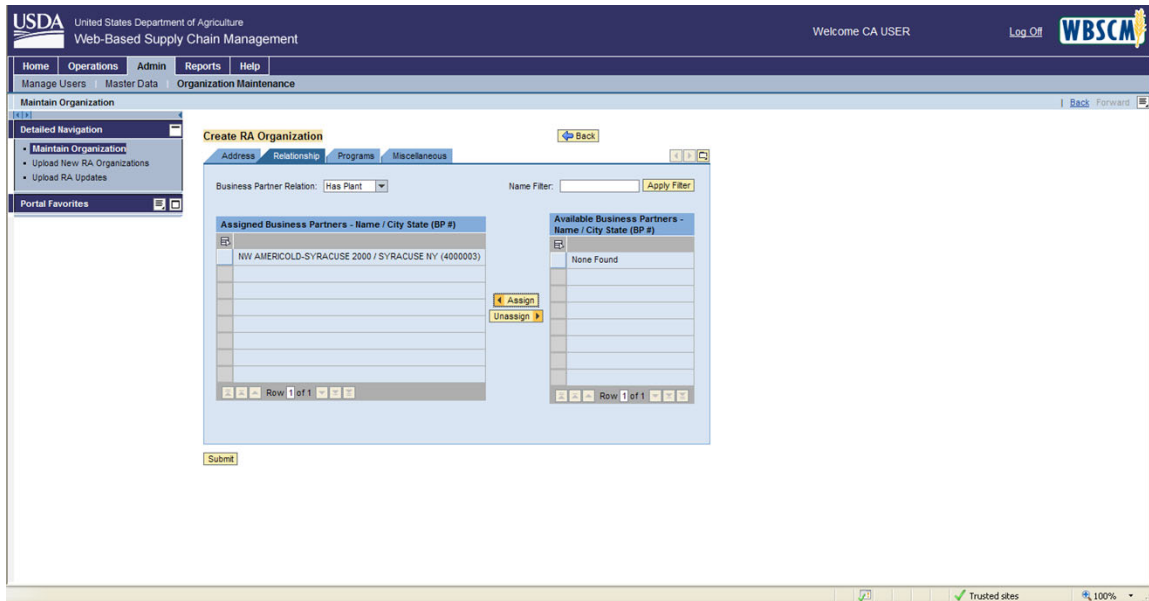
7. Highlight the name of the business partner from the *Available Business Partners* column by clicking  (the **Blue Box**).


## Create RA Organization Screen



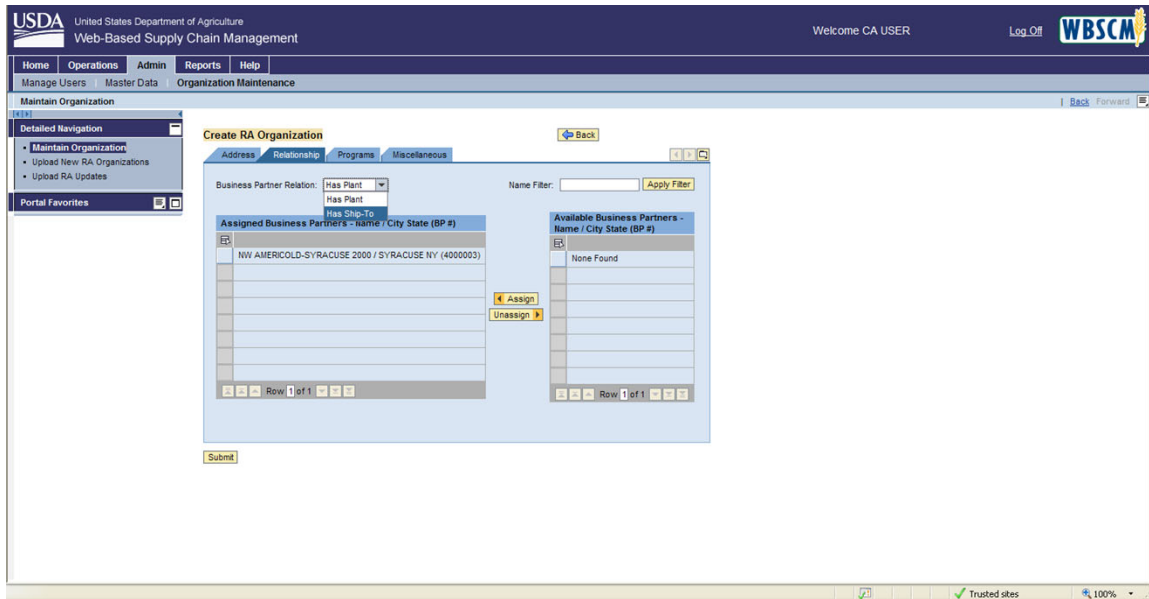
8. Click  (the **Assign** button) to assign your selection to the RA.

## Create RA Organization Screen



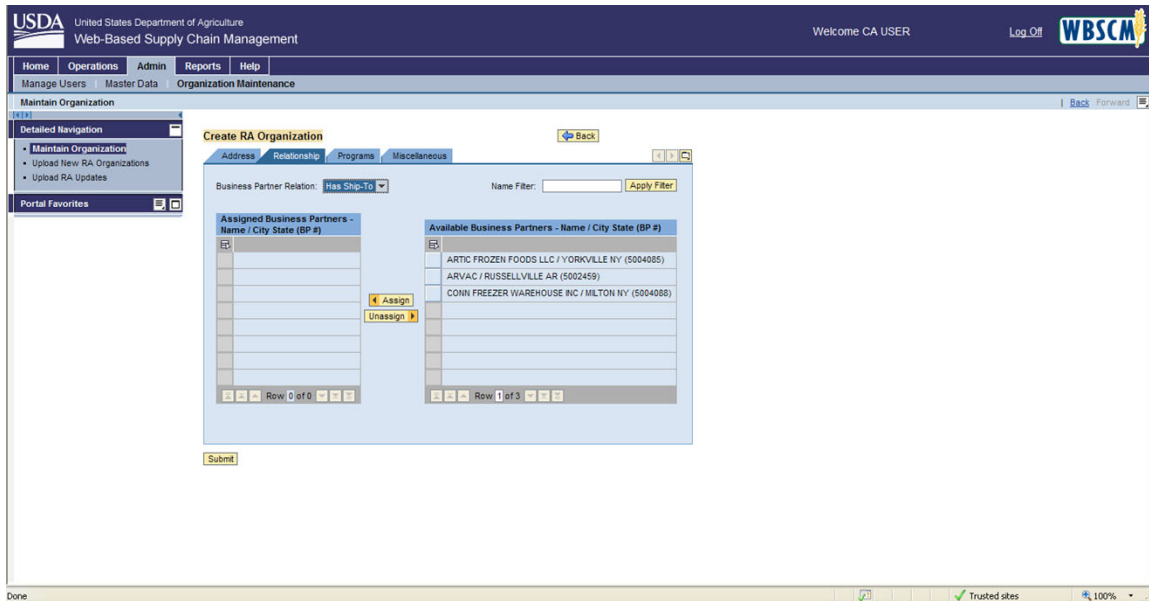
9. In the *Business Partner Relation* field, click  (the **Dropdown** button) to maintain the business partner relations for the RA.


### Create RA Organization Screen



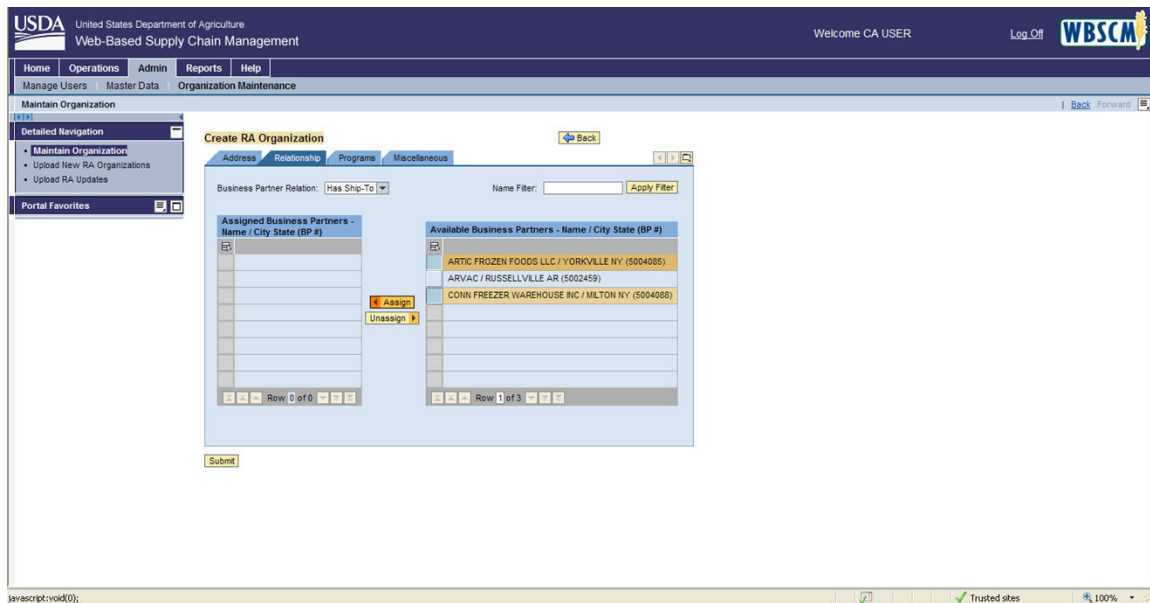
10. Click **Has Ship-To** (the **HasShip-To** option) to select Ship-To locations to assign to the RA.

## Create RA Organization Screen



11. Click  (the **Blue Box**) to select the Ship-To locations.

## Create RA Organization Screen

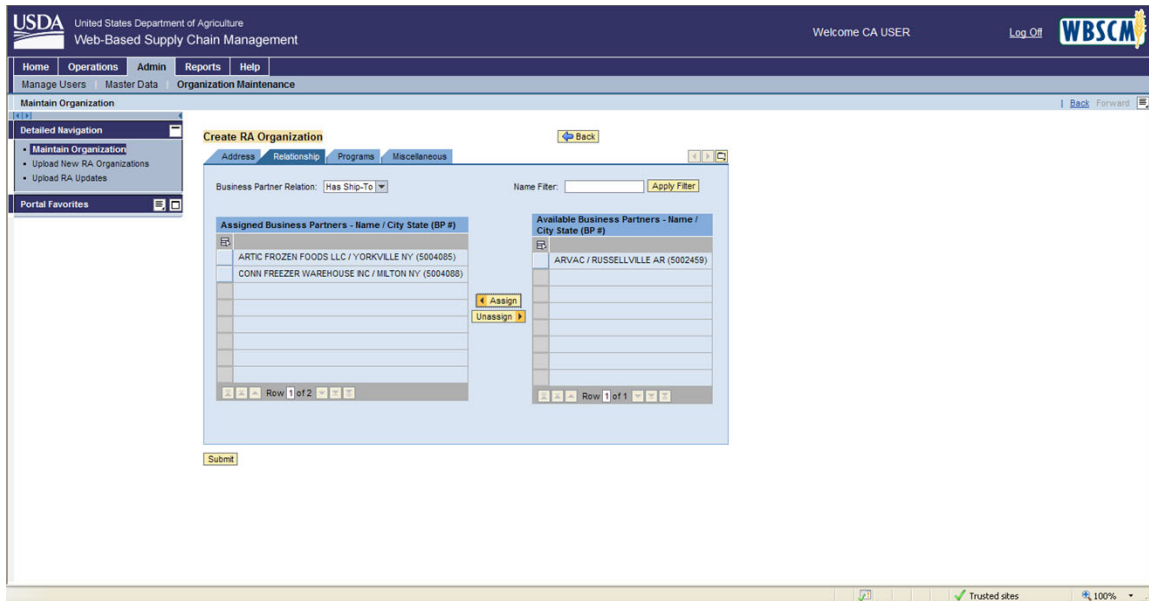


The screenshot displays the 'Create RA Organization' screen within the WBCSCM system. The interface includes a top navigation bar with 'Home', 'Operations', 'Admin', 'Reports', and 'Help' menus. Below this is a sub-menu for 'Organization Maintenance'. The main content area is titled 'Create RA Organization' and features a 'Business Partner Relation' dropdown menu set to 'Has Ship-To'. There are two tables: 'Assigned Business Partners' and 'Available Business Partners'. The 'Available Business Partners' table lists three entries: 'ARTIC FROZEN FOODS LLC / YORKVILLE NY (5004086)', 'ARVAC / RUSSELLVILLE AR (5002459)', and 'CONN FREEZER WAREHOUSE INC / MILTON NY (5004088)'. An 'Assign' button is highlighted in the interface.

12. Click  (the **Assign** button) to assign your selection to the RA.

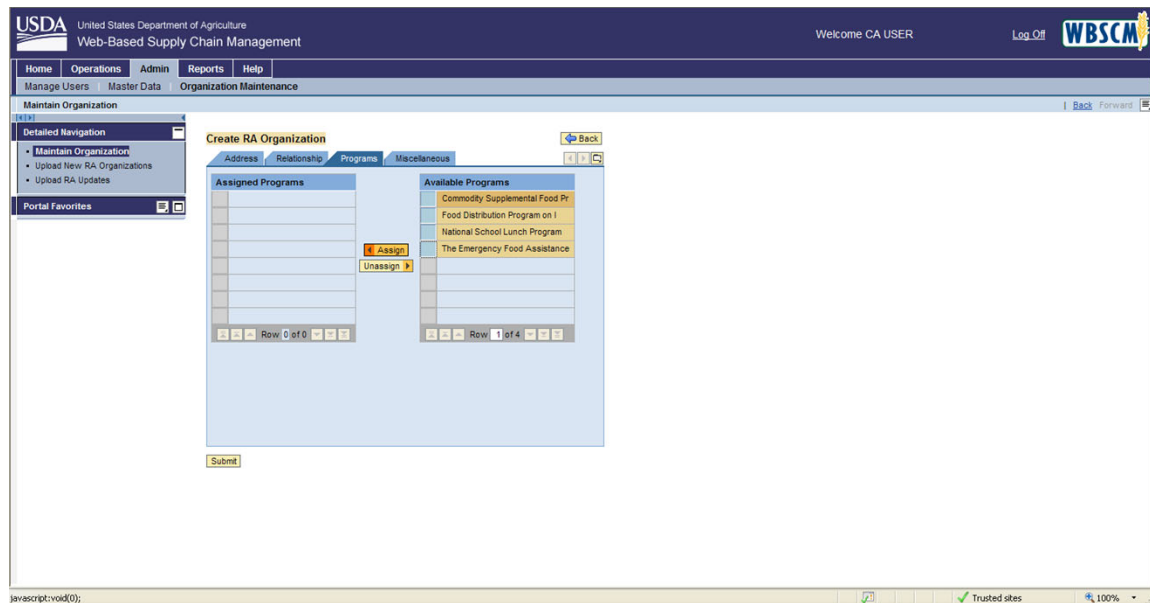


### Create RA Organization Screen



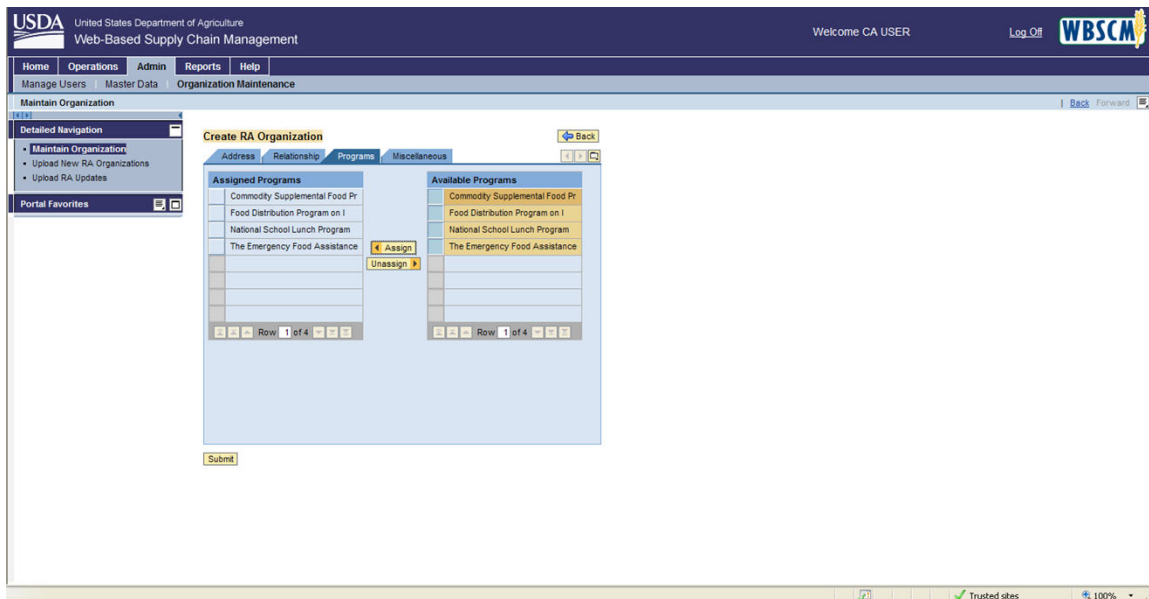
13. Click **Programs** (the **Programs** tab) to assign programs to the RA. Keep in mind that you will only see programs that have been assigned to your SDA by FNS.

## Create RA Organization Screen



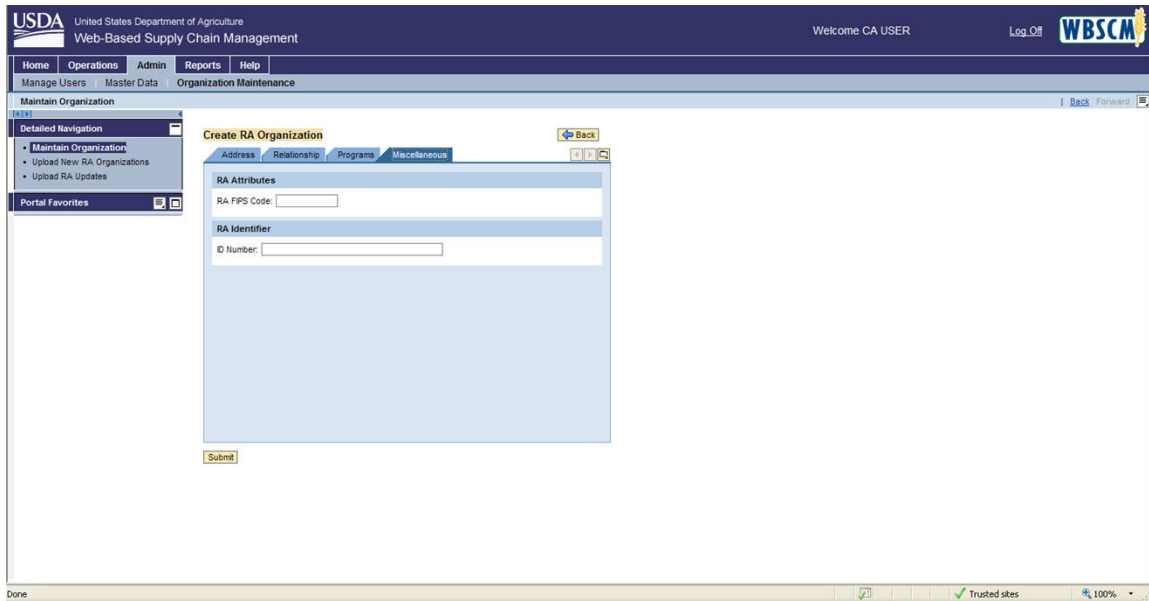
14. Select the program(s) to assign to your RA. Highlight the name of the program(s) from the *Available Programs* column. Click **Assign** (the **Assign** button) to assign the program to the RA. Only those programs assigned to the SDA by FNS can be assigned to the RA.

## Create RA Organization Screen



15. Click **Miscellaneous** (the **Miscellaneous** tab) to enter optional information about the RA such as attributes and identifiers.

### Create RA Organization Screen

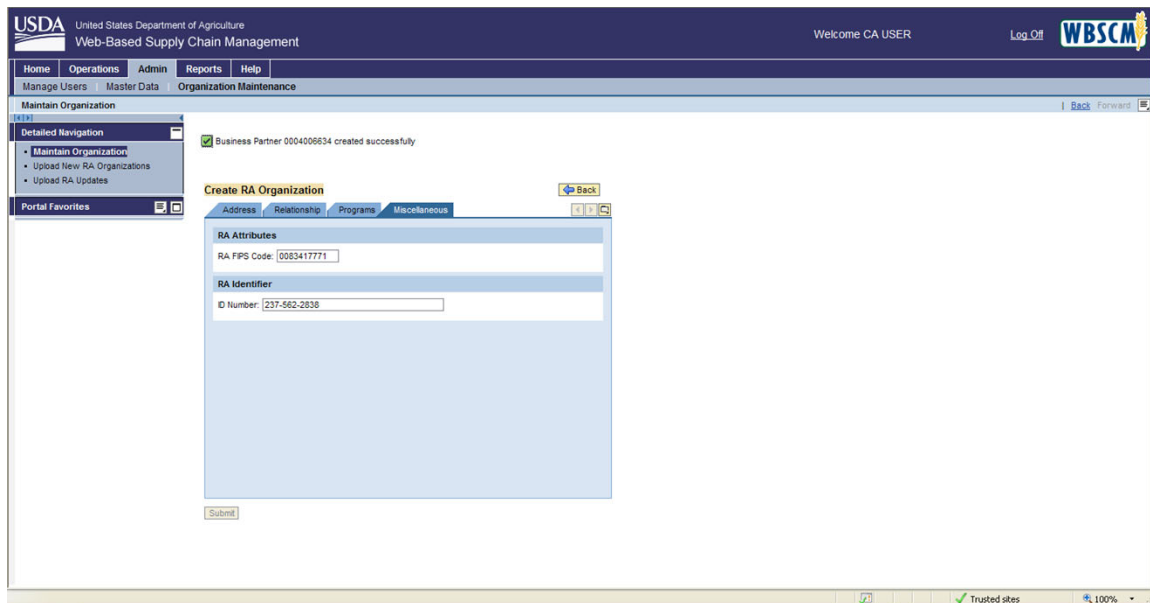


16. Click  (the **text box**) to enter the *FIPS Code* and the *ID Number*.

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

Field	R/O/C	Description
RA FIPS Code:	O	Federal Identifier- a unique code that is assigned to the recipient agency by the federal government.  Example: 008341771
ID Number:	O	Identification number originating from ECOS (an FNS legacy system).  Example: 237-562-2838

## Create RA Organization Screen



18. After entering the desired information on all tabs, click **Submit** (the **Submit** button) to create the RA. The RA will be assigned a business partner number.

You have completed this transaction.



(Note) A confirmation message displays: *Business Partner 0004006634 created successfully.*



Work Instruction  
Create Recipient Agency (RA)

**RESULT**

The transaction has been successfully completed.



## PROCESS OVERVIEW

### Purpose

A Recipient Agency (RA) is a domestic customer that has access to place orders in WBSCM. SDA Org Admins are responsible for creating new RAs in WBSCM. They can do this in two ways - by manually entering in the RA data or by importing an XML file. Most commonly, they will use the "Create RA Organization" procedure, except when they wish to transfer information storage in USDA's legacy systems. Use this transaction to import a new Recipient Agency organization via an XML file upload.

### Process Trigger

After an XML file has been created and contains all required data for the new RA, use this transaction to upload this file and create the new RA in WBSCM.

### Prerequisites

- An XML file containing all required data for the new RA must exist.

### Portal Path

Follow the Portal path below to complete this transaction:

- Select **Admin** tab → **Organization Maintenance** tab → **Upload New RA Organizations** to go to the *Upload New RA Organizations* initial 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 WBSCM Portal Basic Navigation course for tips on creating favorites, performing searches, etc.




## PROCEDURE

1. Start the transaction using the following Portal path: select **Admin** tab → **Organization Maintenance** tab → **Upload New RA Organizations**

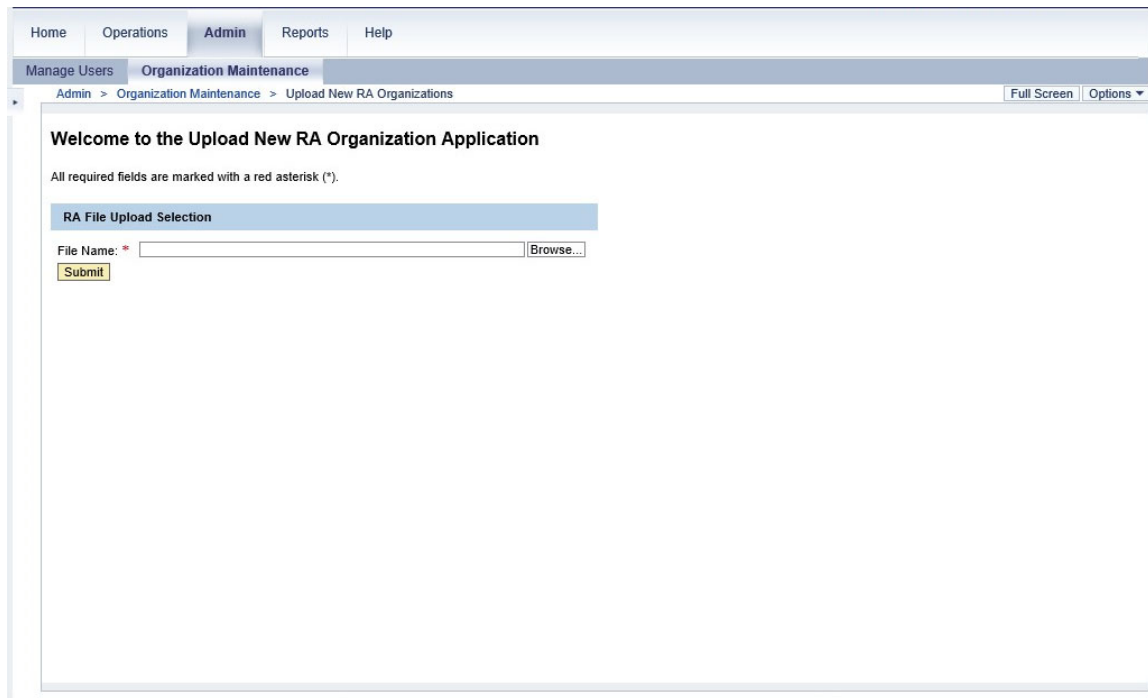
### Image: Upload New RA Organizations - WBSCM Portal

The screenshot displays the WBSCM Portal interface. At the top, the USDA logo and 'Web-Based Supply Chain Management' are visible, along with a 'QAS PSL' button and 'New Session | Log off' links. The navigation bar includes 'Home', 'Operations', 'Admin', 'Reports', and 'Help'. The 'Admin' tab is active, showing 'Organization Maintenance' and 'Upload New RA Organizations' options. The main content area is titled 'Welcome to the Upload New RA Organization Application' and contains a 'RA File Upload Selection' section with a 'File Name: \*' input field and a '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: Upload New RA Organizations Screen**

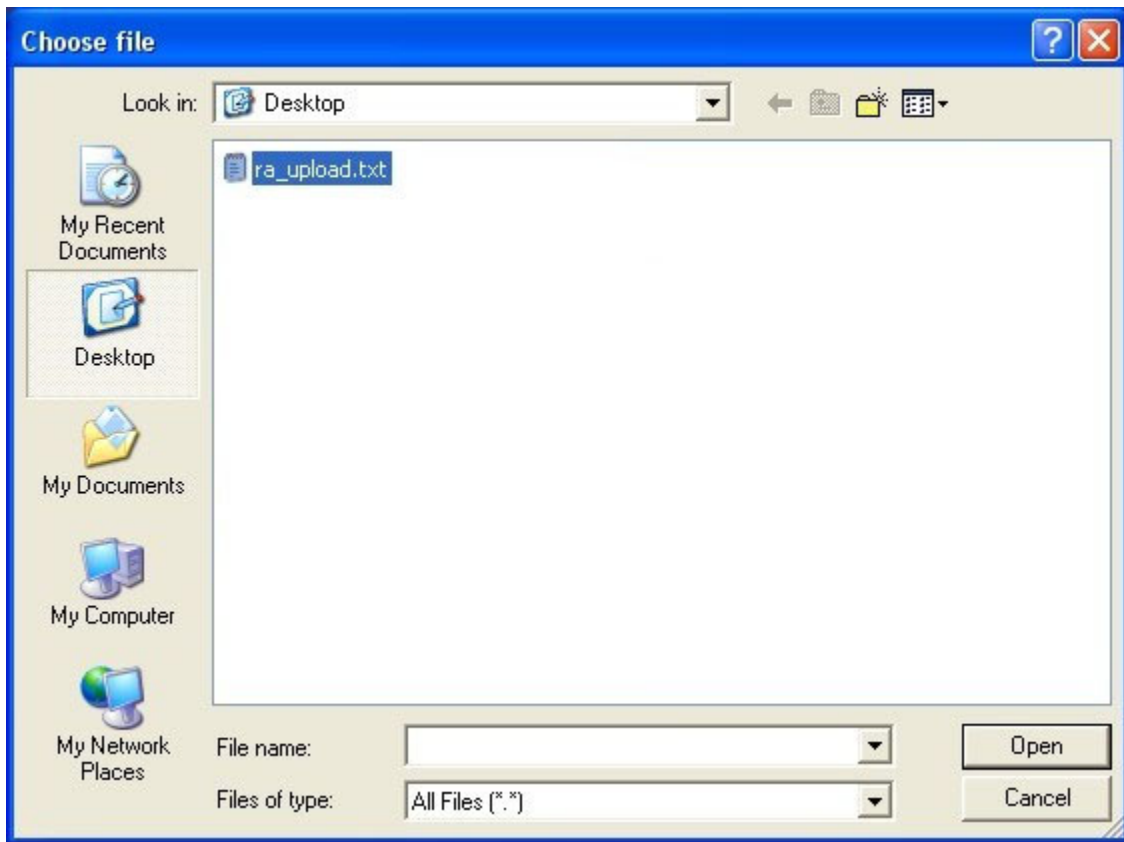


3. Click **Browse...** (the **Browse...** button) to locate the XML file for uploading to WBSCM.



(Note) RA upload XML file can contain a maximum of 200 RAs.

Image: Choose File Pop-up



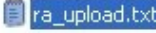
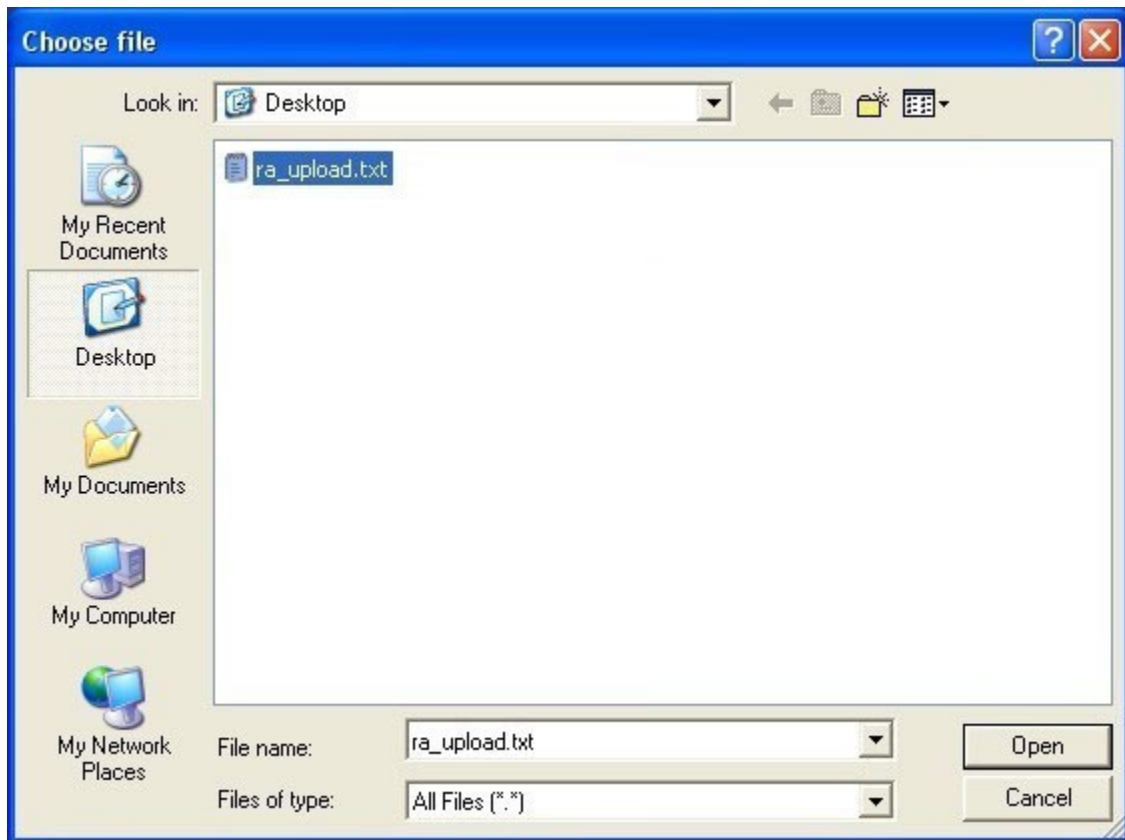
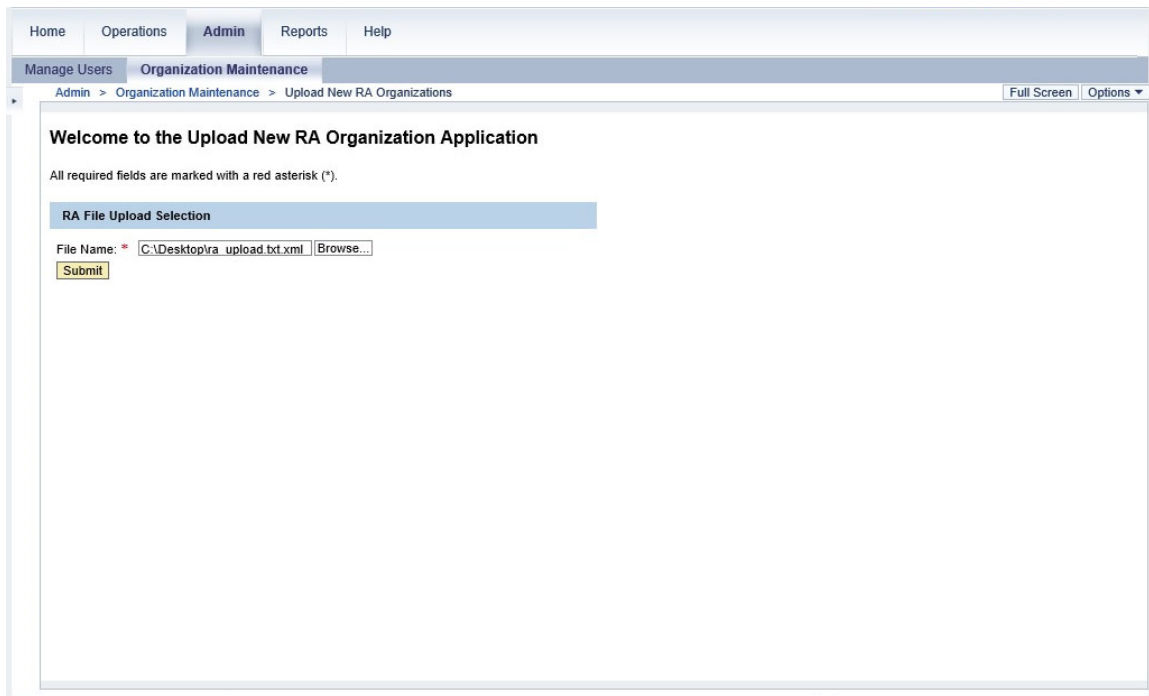
4. Click on the XML file to select it. In this example the  (the **ra\_upload.txt** file) was selected.

Image: Choose File Pop-up



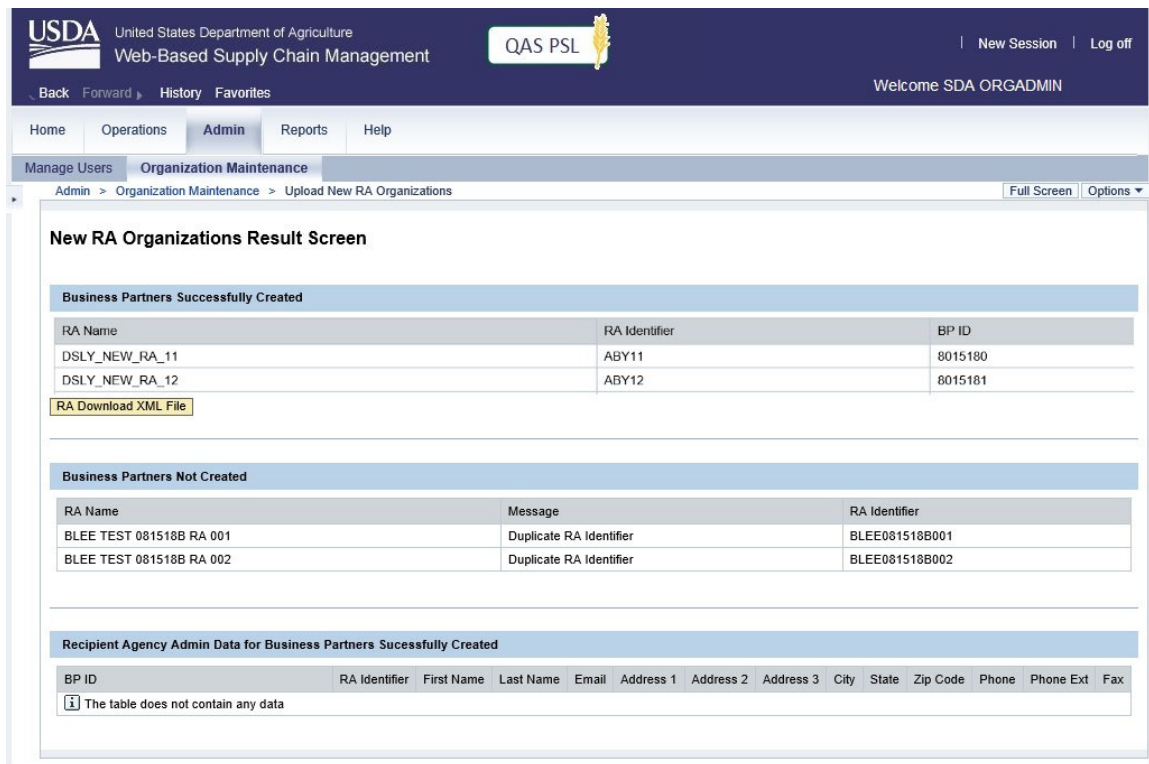
5. Click  (the **Open** button) to begin the upload process for this file.

**Image: Upload New RA Organizations Screen**



6. Click **Submit** (the **Submit** button) to upload the XML file to the system.

**Image: Upload New RA Organizations Screen**



7. The transaction is complete.



Work Instruction  
Import New RA Organizations

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(Note) A list of RAs successfully created will appear in the *Business Partners Successfully created* screen section. A list of any RAs not created will appear in the *Business Partners Not Created* screen section.



Work Instruction  
Import New RA Organizations

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**RESULT**

SDA/ITO org admin have successfully setup RA organizations by uploading XML file WBSCM.



## PROCESS OVERVIEW

### Purpose

A Recipient Agency (RA) is a domestic customer organization that can place domestic requisitions in WBSCM. RA organizations are created and maintained by State Distributing Agency (SDA) Org Admins. The purpose of this transaction is to maintain an RA organization in WBSCM. This includes modifying address information, and assigning (or un-assigning) National Warehouse, Ship-to locations, programs to the organization and activate or inactivate the RA organization. SDA Org Admins use this transaction to modify an existing RA Organization in the WBSCM system. Some attributes can also be maintained by the RA Org Admin.

Note: An SDA cannot delete an RA. Contact the WBSCM Service Desk for assistance to delete an RA from WBSCM.

### Process Trigger

Use this transaction to alter information for an existing RA Organization in the WBSCM system.

### Prerequisites

The RA Organization must already exist in the WBSCM system before its information can be changed.

### Portal Path

Follow the Portal path below to complete this transaction:

- Select **Admin** tab → **Organization Maintenance** folder → **Maintain Organization** link → **Update RA Organization** link to go to the *Update RA Organization* screen.

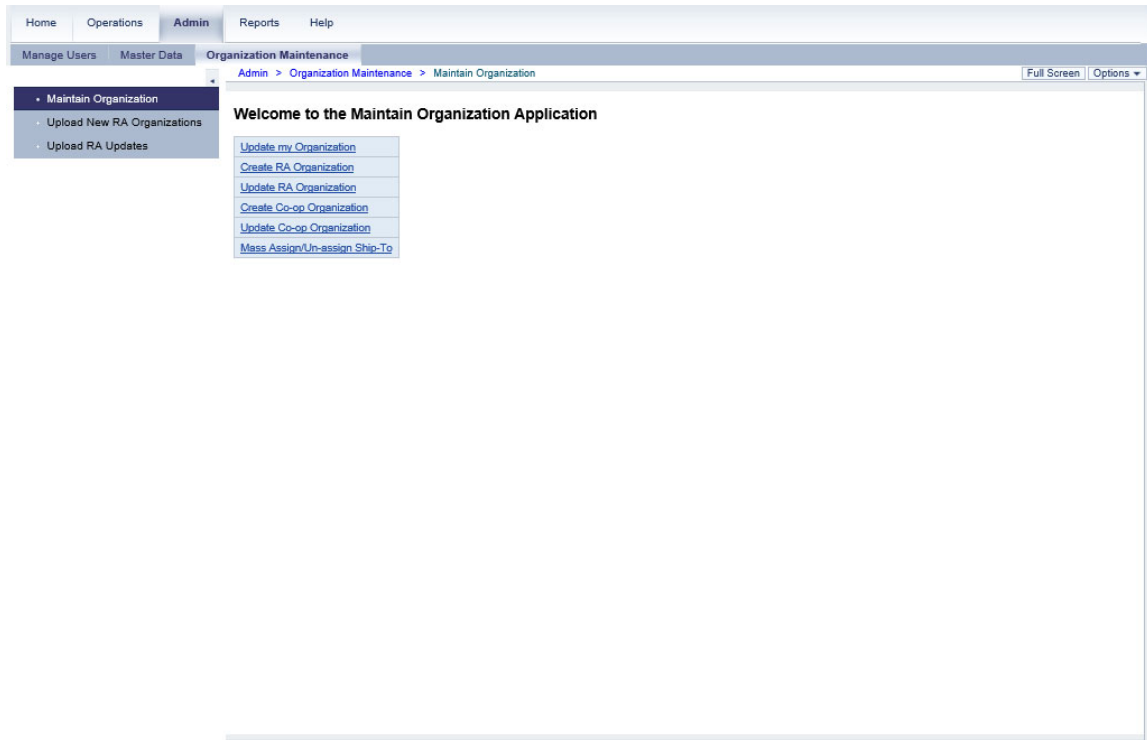
### Tips and Tricks


- 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 Portal Basic Navigation course for tips on creating favorites, performing searches, etc.

## PROCEDURE

1. Start the transaction using the Portal path. Select **Admin** tab → **Organization Maintenance** folder → **Maintain Organization** link.

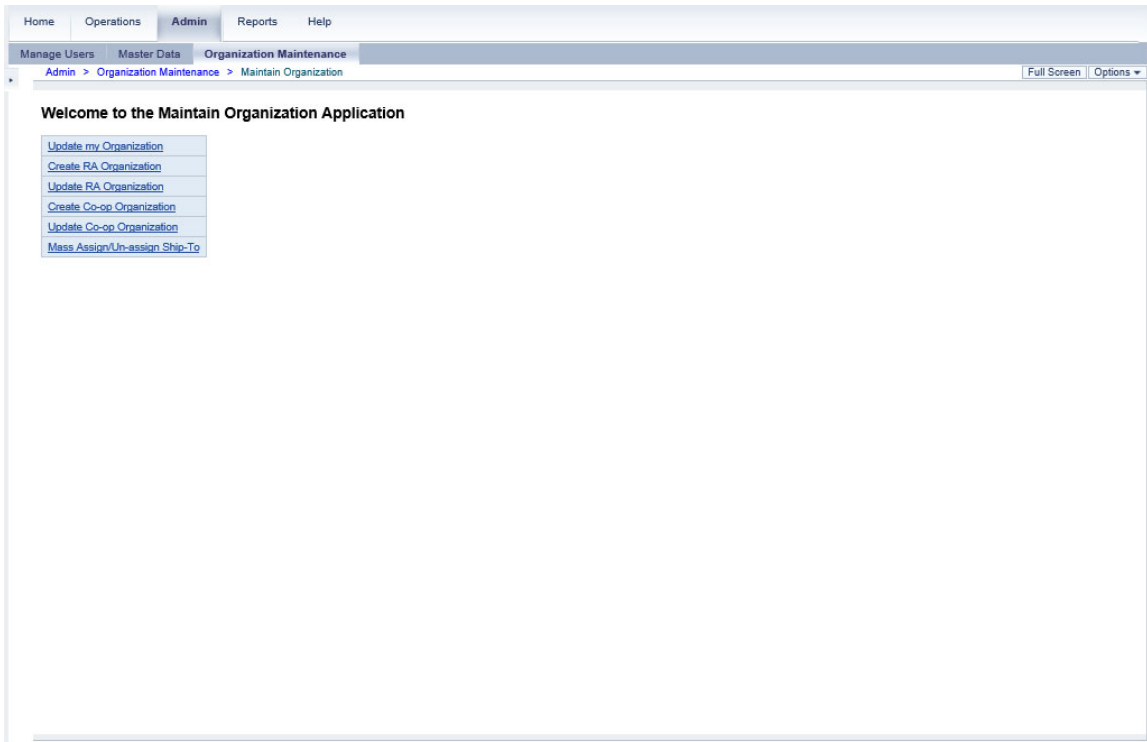
### Image: Maintain Organization Screen



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

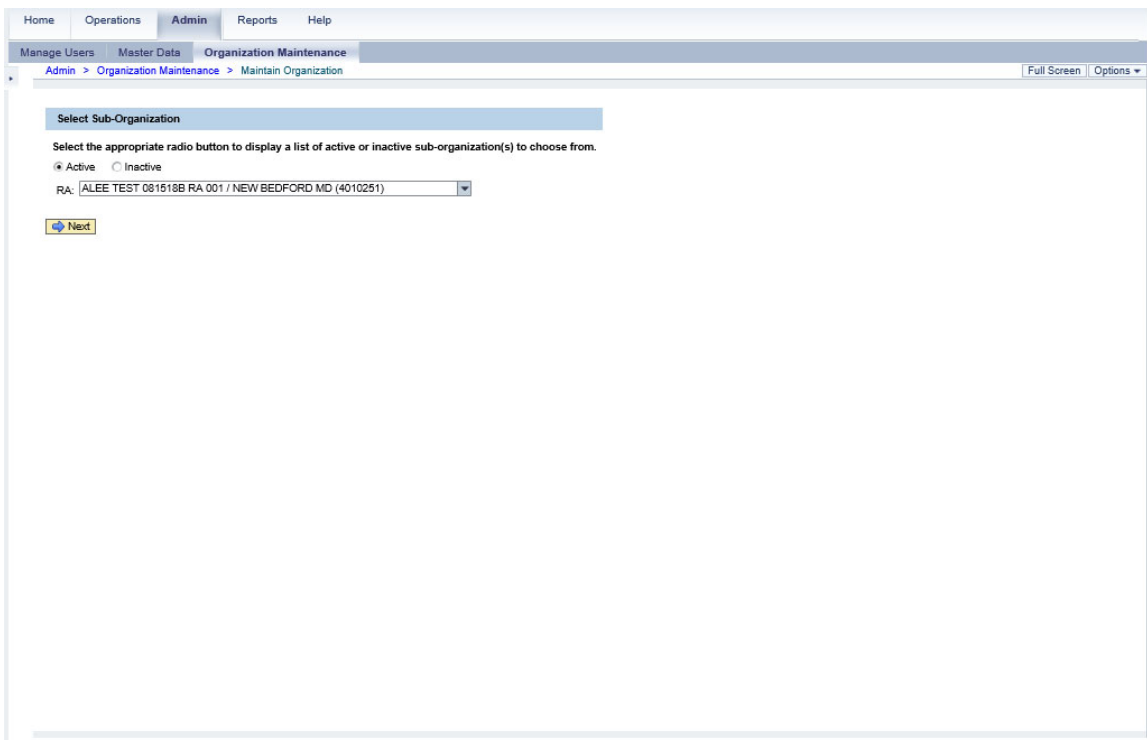


### Image: Maintain Organization Screen



3. Click [Update RA Organization](#) (the Update RA Organization button).

### Image: Maintain Organization Screen



4. Click (the **Drop-down** button) from the **RA** field to select the required RA.



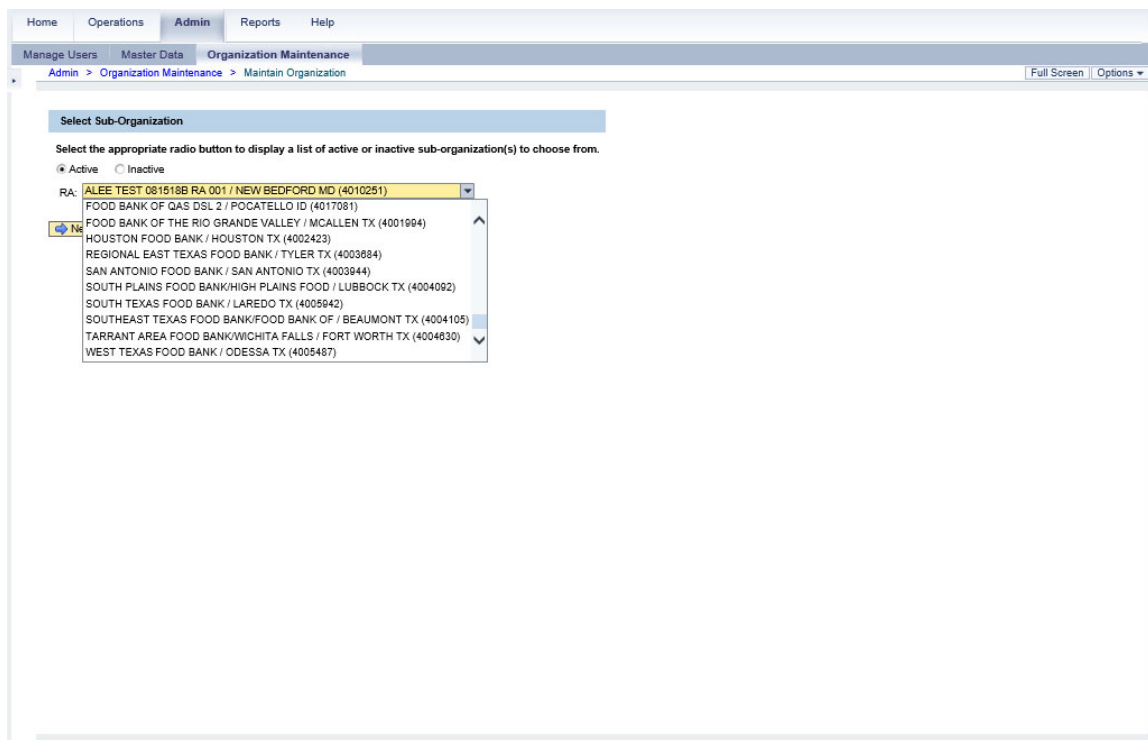
(Note) If the user is an **RA Org Admin**, their own organization's profile will be displayed, and will not have the option to select other RAs.

As an **SDA Org Admin**, the user will be able to choose from the RAs within their organization hierarchy.



(Note) WBSCM defaults to display active RAs in the drop-down when  **Active** (the **Active** radio button) is selected. If the user needs to display inactive RAs, click  **Inactive** (the **Inactive** radio button) prior to clicking (the **Drop-down** button) for the **RA** field.

#### Image: Maintain Organization Screen



5. Select the appropriate RA from the list. In this example, **WEST TEXAS FOOD BANK / ODESSA TX (4005487)** (the **WEST TEXAS FOOD BANK / ODESSA TX (4005487)**) is selected.

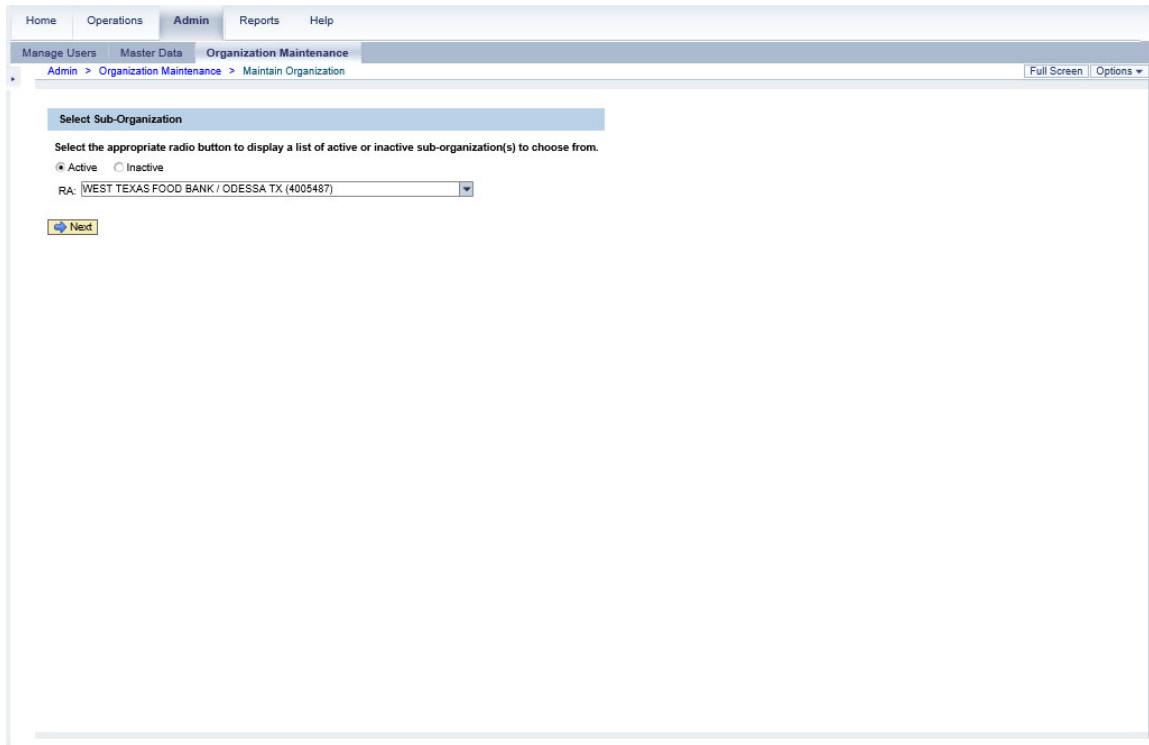



(Note) Only one RA can be modified at a time.



(Note) The available RAs are listed in alphabetical order by name. Use the vertical scrollbar to search through the list, or type the first letter of the name to select from RA organizations that start with that letter.

**Image: Maintain Organization Screen**

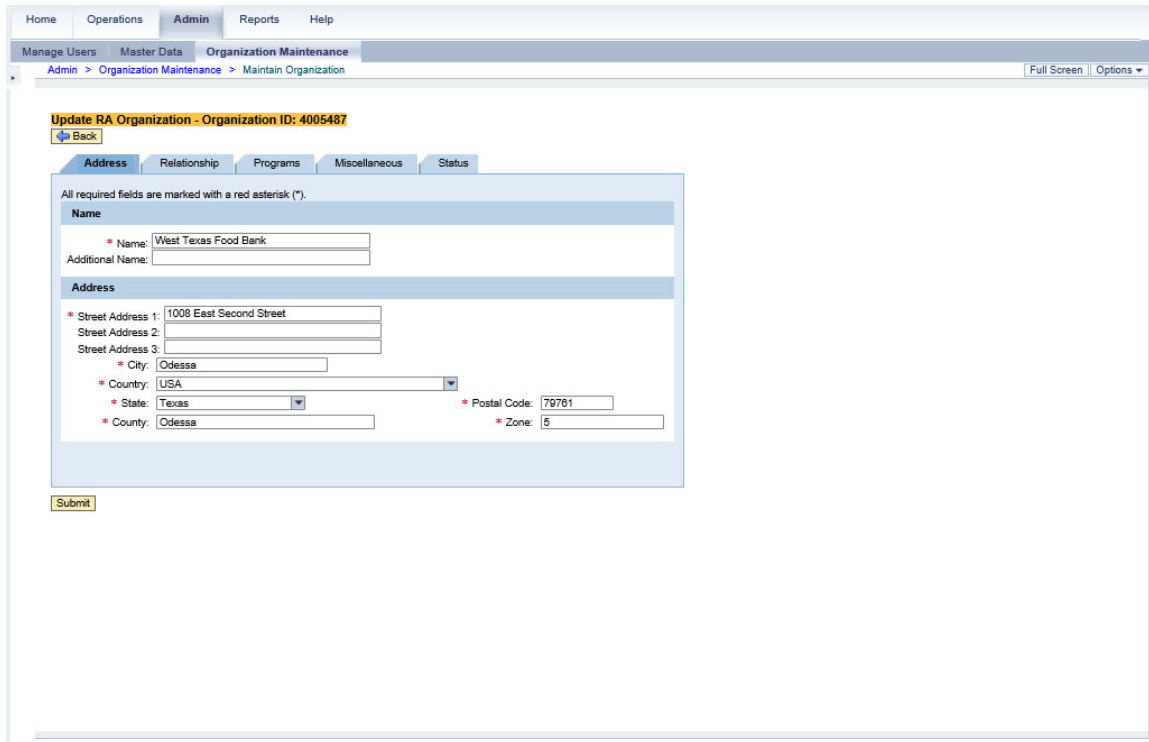


6. Click  (the **Next** button).

7. Perform one of the following:

If	Then
The user needs to update an existing RA organization	Go to Step 8.
The user needs to activate/inactivate an existing RA organization	Go to Step 20.

**Image: Maintain Organization Screen**







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

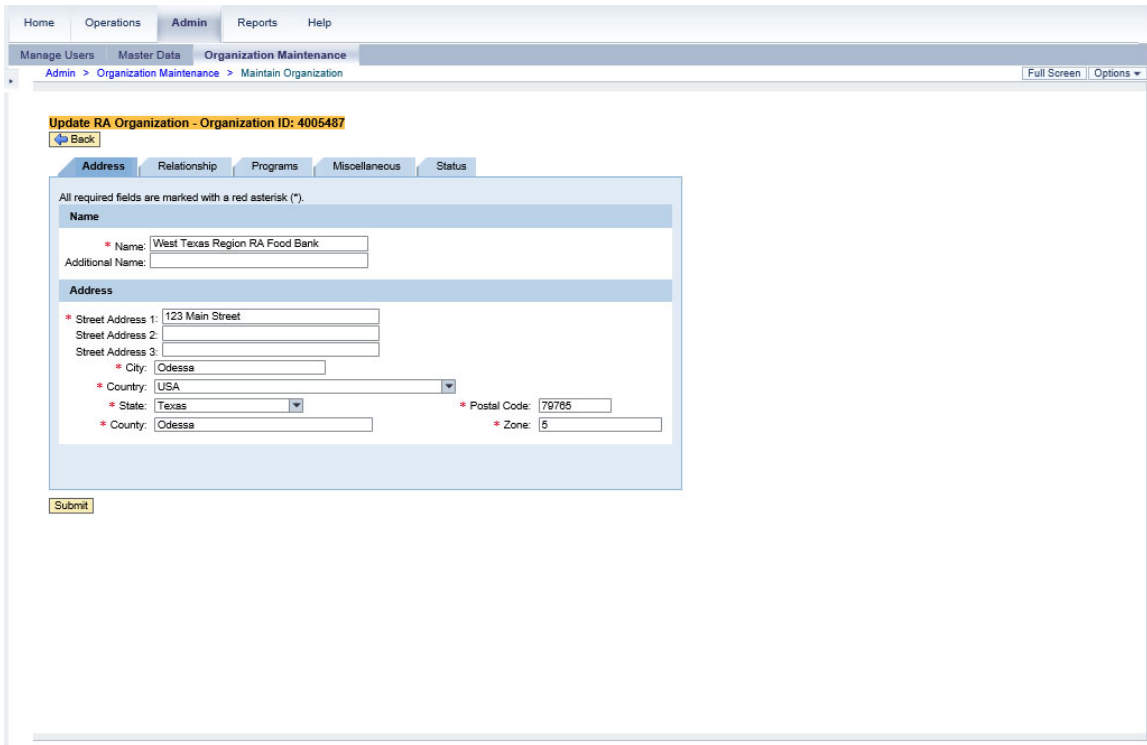
Field	R/O/C	Description
Name:	R	Person or business partner's name.  <b>Example:</b> West Texas Region RA Food Bank
Additional Name:	O	A free text field to enter an additional name or name of recipient.
Street Address 1:	R	A free text field in which to enter the street address of the user or organization.  <b>Example:</b> 123 Main Street
Street Address 2:	O	A free text field in which to enter the street address of the user or organization.



Work Instruction  
Maintain Recipient Agency (RA)

Field	R/O/C	Description
Street Address 3:	O	A free text field in which to enter the street address of the user or organization.
City:	R	City where the user or company is located.  <b>Example:</b> Odessa
Country:	R	Country code that represents country name.  <b>Example:</b> USA   (Note) The Country  ( <b>Drop-down button</b> ) displays a list of countries.
State:	R	The abbreviation of United States territory, district or state.  <b>Example:</b> Texas   (Note) The State  ( <b>Drop-down button</b> ) displays a list of states and territories.
Postal Code:	R	A ZIP code.  <b>Example:</b> 79765
County:	R	Region or geographical area.  <b>Example:</b> Odessa
Zone:	R	Identifying number assigned to an RA by their SDA.  <b>Example:</b> 5

**Image: Maintain Organization Screen**



Home | Operations | Admin | Reports | Help

Manage Users | Master Data | Organization Maintenance

Admin > Organization Maintenance > Maintain Organization

Update RA Organization - Organization ID: 4005487

Back

Address | Relationship | Programs | Miscellaneous | Status

All required fields are marked with a red asterisk (\*).

**Name**

\* Name: West Texas Region RA Food Bank

Additional Name:

**Address**

\* Street Address 1: 123 Main Street

Street Address 2:

Street Address 3:

\* City: Odessa

\* Country: USA

\* State: Texas

\* County: Odessa

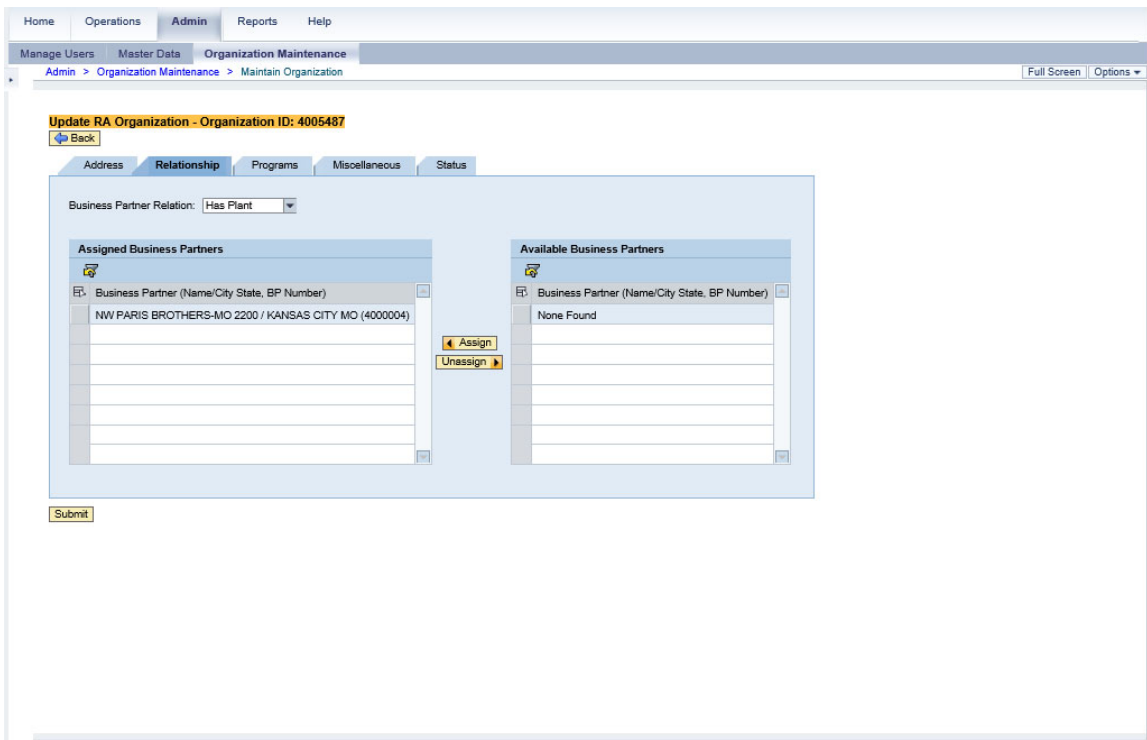
\* Postal Code: 79785

\* Zone: 5

Submit

9. Click **Relationship** (the **Relationship** tab) to review and modify relationships between the RA and the Business Partner.

**Image: Maintain Organization Screen**



Home | Operations | Admin | Reports | Help

Manage Users | Master Data | Organization Maintenance

Admin > Organization Maintenance > Maintain Organization

Update RA Organization - Organization ID: 4005487

Back

Address | Relationship | Programs | Miscellaneous | Status

Business Partner Relation: Has Plant

**Assigned Business Partners**


Business Partner (Name/City State, BP Number)
NW PARIS BROTHERS-MO 2200 / KANSAS CITY MO (4000004)

Assign | Unassign

**Available Business Partners**

Business Partner (Name/City State, BP Number)
None Found

Submit

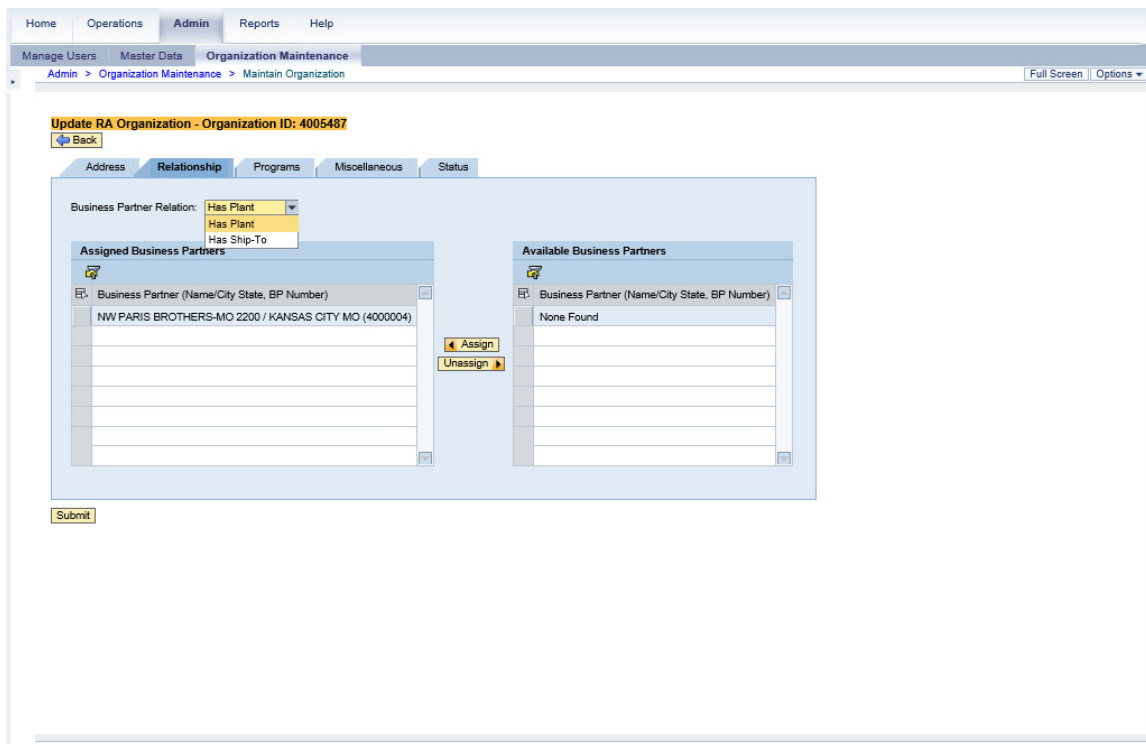
10. Click  (the **Drop-down** button) for the **Business Partner Relation** field.



(Note) Business Partner types include:

- **Has Plant** - Each RA is associated with an SDA. The SDA can have one or more National Warehouse Plants assigned to it. The plant(s) assigned to the SDA are listed under the **Available Business Partners**, from which the user may select when assigning a plant to their RA.
- **Has Ship-To** - Each RA can have one or more Ship-To locations sites where the RA will receive ordered materials.

**Image: Maintain Organization Screen**



11. Click the appropriate relationship type to select Business Partner(s) to assign/unassign to the RA. In this example, **Has Ship-To** (the **Has Ship-To** option) is selected.



(Note) The Business Partners are listed in alphabetical order. Use the vertical scrollbar to find the appropriate Business Partners. To select multiple business partners:

- If the business partners are listed in consecutive rows, hold down the Shift key and click the first and last selection buttons.
- To select business partners from non-consecutive rows, hold down the Ctrl key while clicking each selection button.

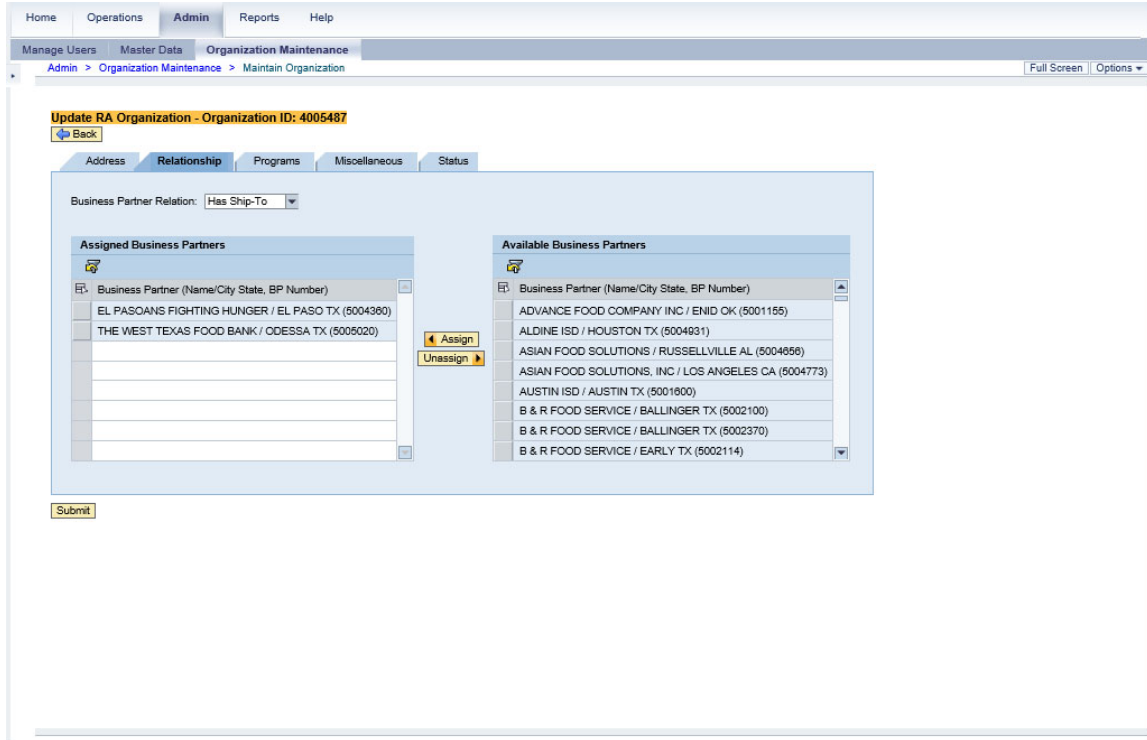
The multiple selection also applies to the **Programs** tab.




(Note) To filter the list of Business Partners click on the column **Business Partner**

(Name/City State, BP Number) field. Select **(All)** (the **User-Defined Filter...** option) and enter required criteria. Use \* (the **Asterisk** symbol) at the beginning and at the end of a search term (e.g., \*Craven\* or \*5001716\*) to search for a Business Partner that contains the term. The asterisk searches part of a word as well (e.g., \*Califor\*). See also the [Wildcard and Matchcode Searches](#) job aid. To remove filter select the **(All)** option.

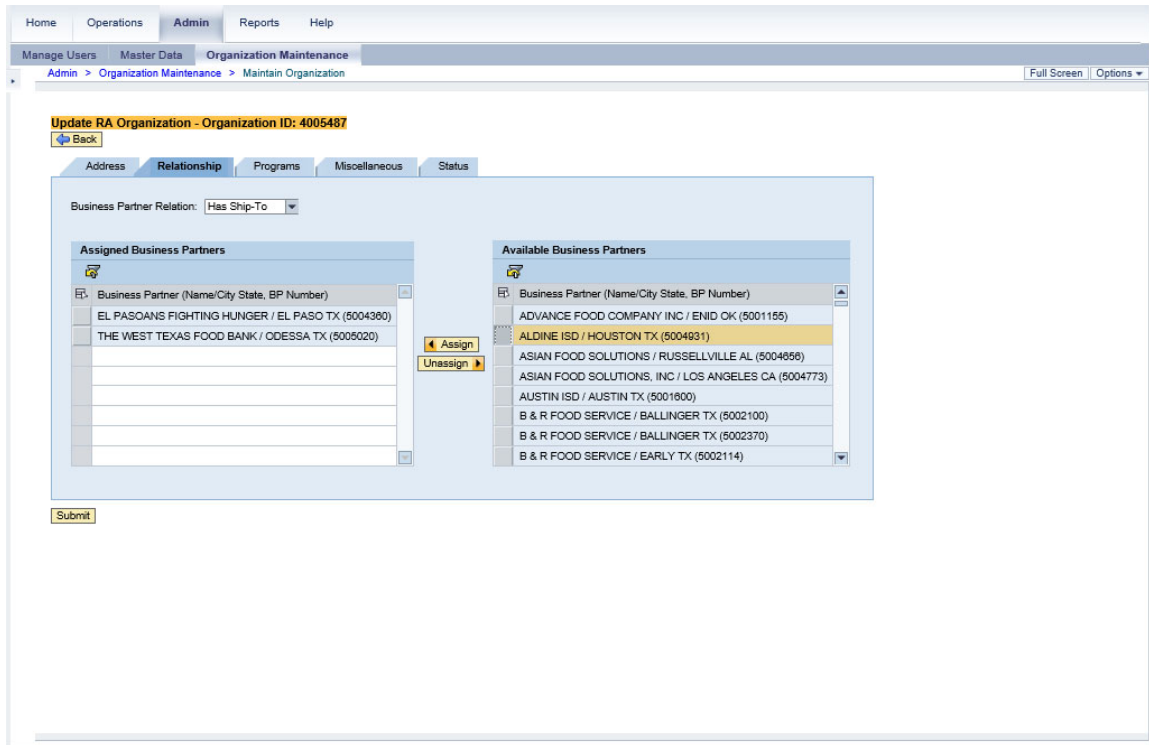
**Image: Maintain Organization Screen**



12. Click  (the **Selection** button) to select the appropriate Business Partner(s) under the *Available Business Partners* section. In this example, the Business Partner **ALDINE ISD / HOUSTON TX (5004931)** is selected.



**Image: Maintain Organization Screen**



13. Click  (the **Assign** button) to assign the selected Business Partner(s) to the RA. The Business Partner is moved to the *Assigned Business Partner* section.




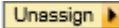
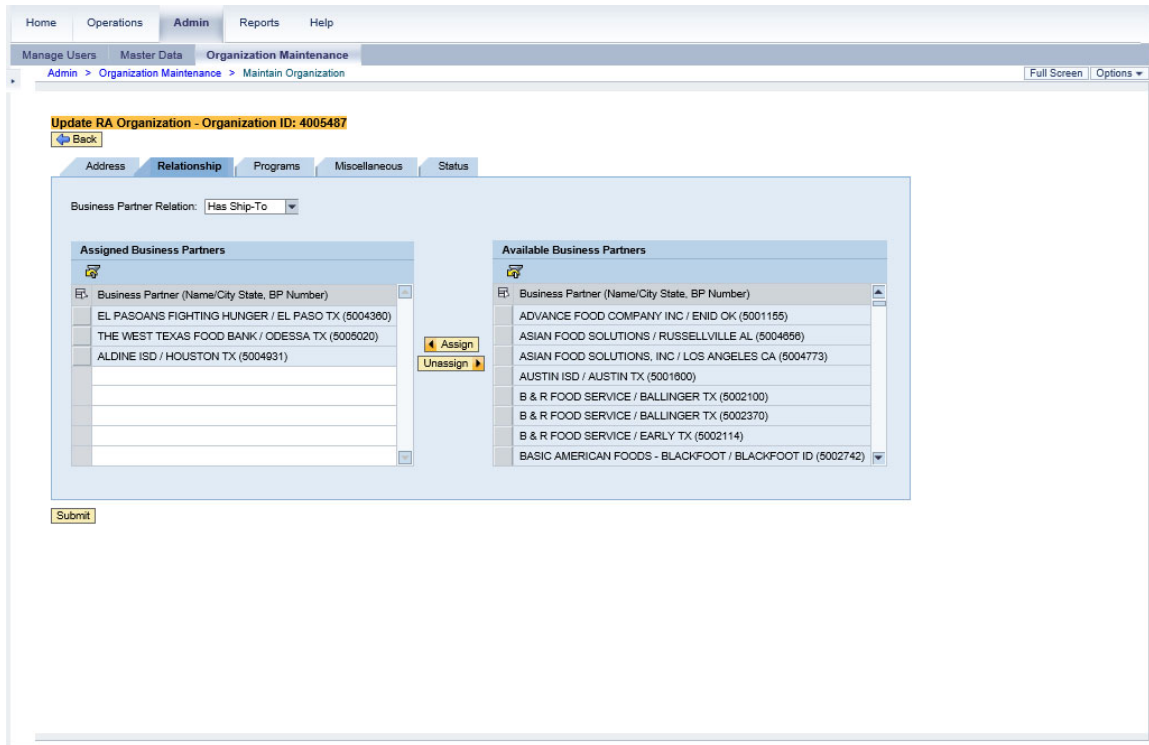
**(Note)** To unassign Business Partner(s), click  (the **Selection** button) to select from the *Assigned Business Partners* section, and then click  (the **Unassign** button).

Image: Maintain Organization Screen

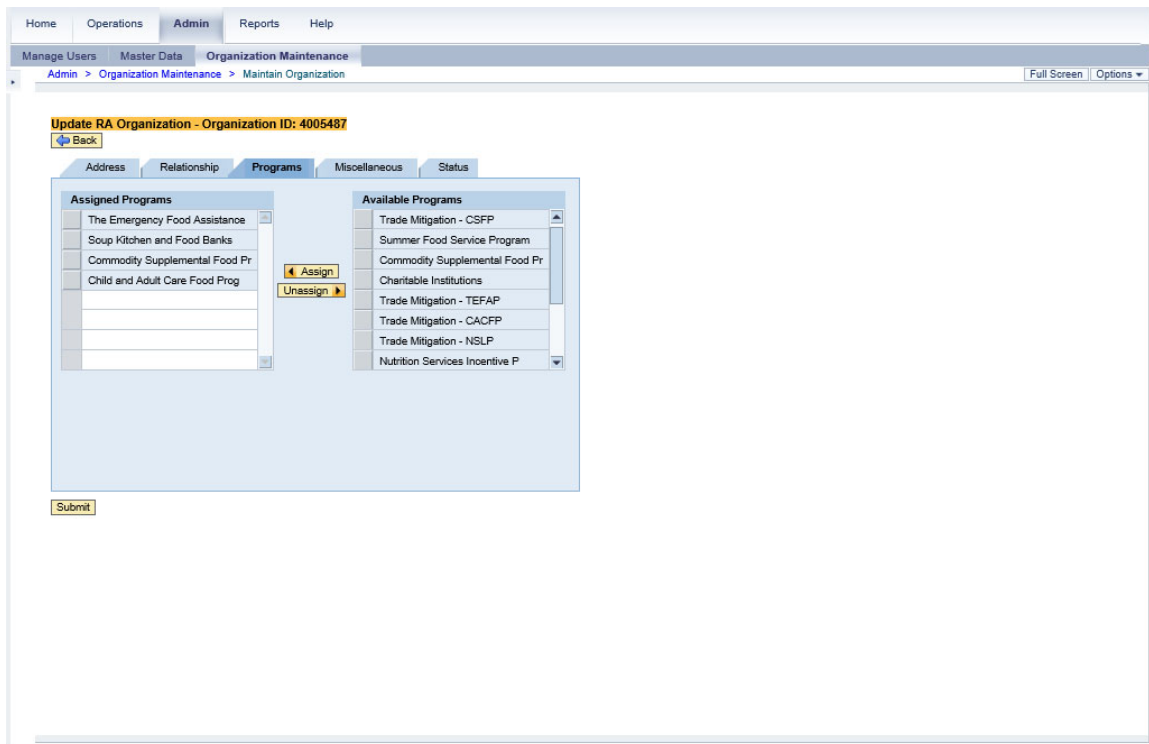


14. Click **Programs** (the **Programs** tab) to assign/unassign programs to the RA.



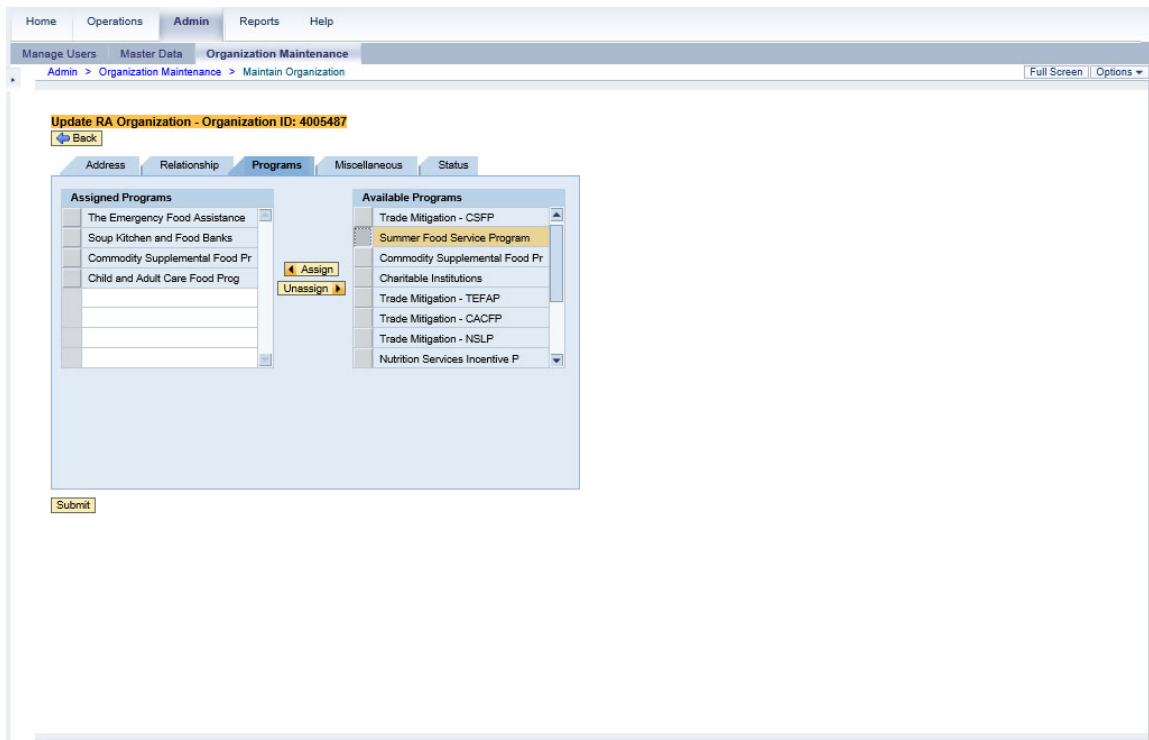
(Note) Only programs that have been assigned to the user's SDA by FNS will be shown.

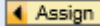
**Image: Maintain Organization Screen**



15. Click  (the **Selection** button) to select the appropriate Program(s) under the *Available Programs* section. In this example, the **Summer Food Service Program** is selected.

**Image: Maintain Organization Screen**

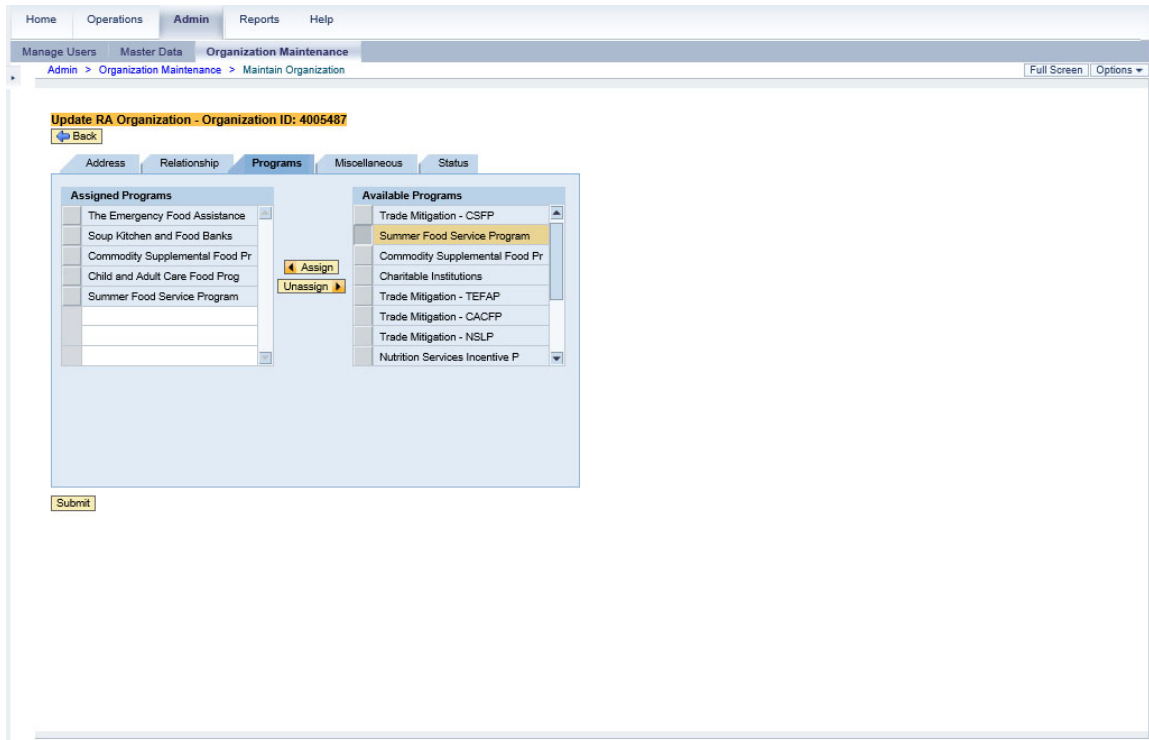


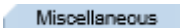
16. Click  (the **Assign** button) to assign to the selected program(s) to the RA. The program is moved to the *Assigned Programs* section.



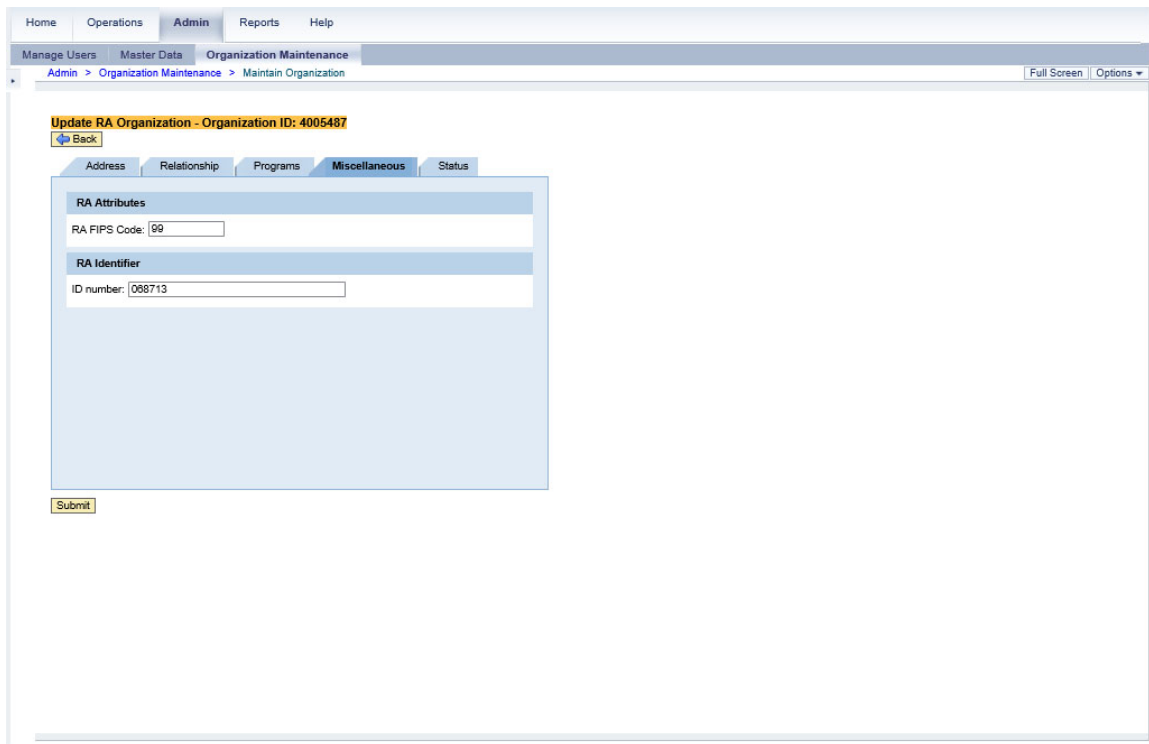
(Note) To unassign program(s), click  (the **Selection** button) to select the program(s) from the *Assigned Programs* section, and then click  (the **Unassign** button).

**Image: Maintain Organization Screen**



17. Click  (the **Miscellaneous** tab) to enter optional information about the RA such as attributes and identifiers.

**Image: Maintain Organization Screen**



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

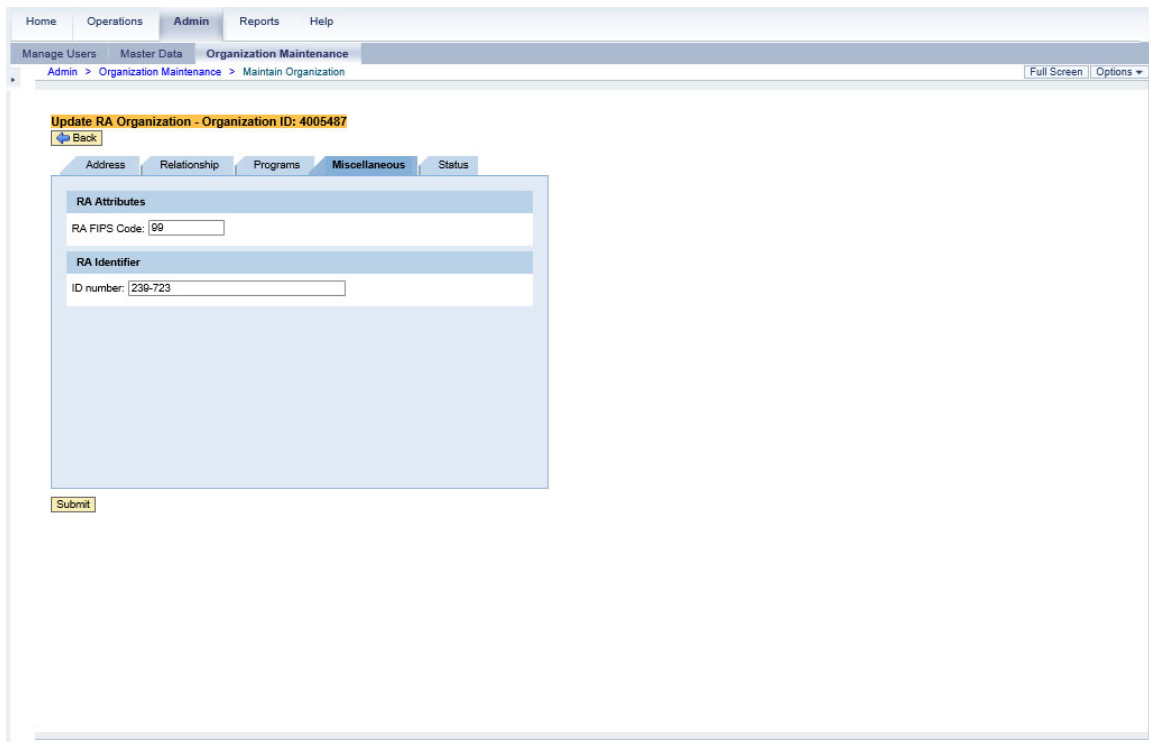
Field	R/O/C	Description
RA FIPS Code:	O	A unique code that is assigned to the recipient agency by the Federal government.  <b>Example:</b> 99
ID number:	O	Identification number originating from the ECOS system.  <b>Example:</b> 239-723

19. Go to Step 23.



(Note) Steps 20 - 22 review how to inactivate an RA.

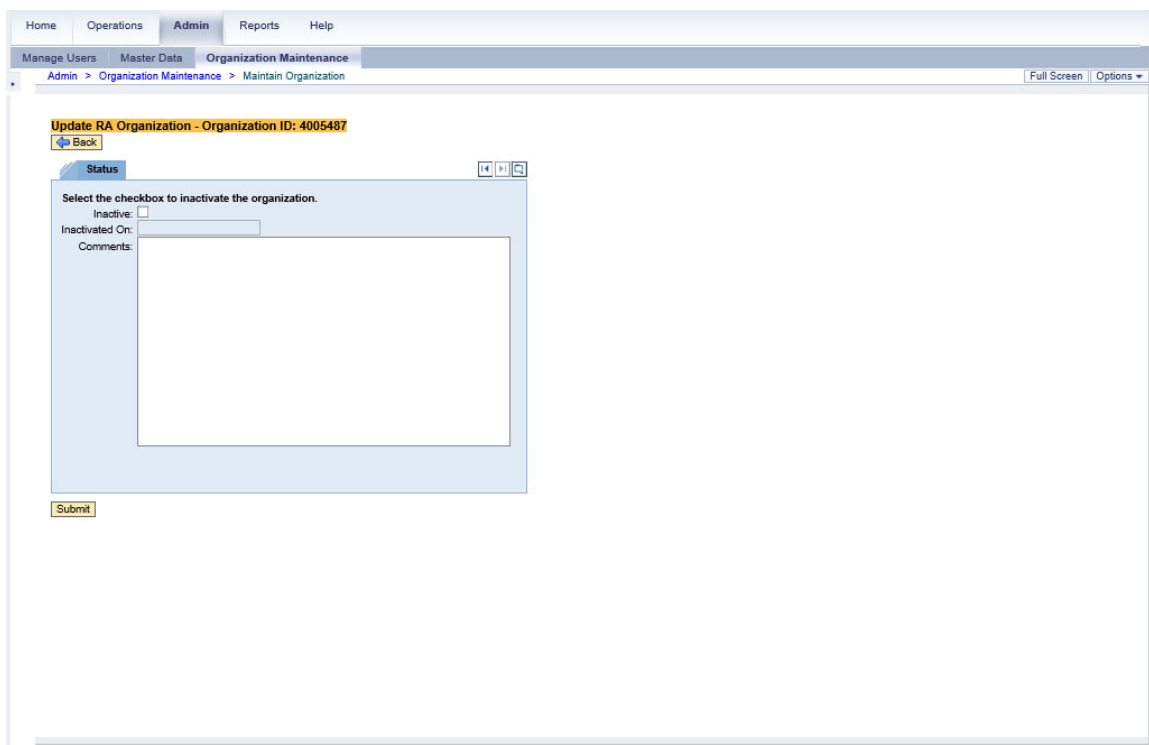
**Image: Maintain Organization Screen**



The screenshot shows the 'Miscellaneous' tab of the 'Maintain Organization' screen. The page title is 'Update RA Organization - Organization ID: 4005487'. There is a 'Back' button. The 'Miscellaneous' tab is selected, and it contains two sections: 'RA Attributes' with a text input field for 'RA FIPS Code' containing the value '99', and 'RA Identifier' with a text input field for 'ID number' containing the value '239-723'. A 'Submit' button is located at the bottom left of the form area.

20. If necessary, click **Status** (the **Status** tab) to change the status of the RA.

**Image: Maintain Organization Screen**



The screenshot shows the 'Status' tab of the 'Maintain Organization' screen. The page title is 'Update RA Organization - Organization ID: 4005487'. There is a 'Back' button. The 'Status' tab is selected, and it contains a section titled 'Select the checkbox to inactivate the organization.' with an 'Inactive' checkbox. Below this are text input fields for 'Inactivated On:' and 'Comments:'. A 'Submit' button is located at the bottom left of the form area.

21. Click  (the **Inactive** checkbox) to change the status of the RA.



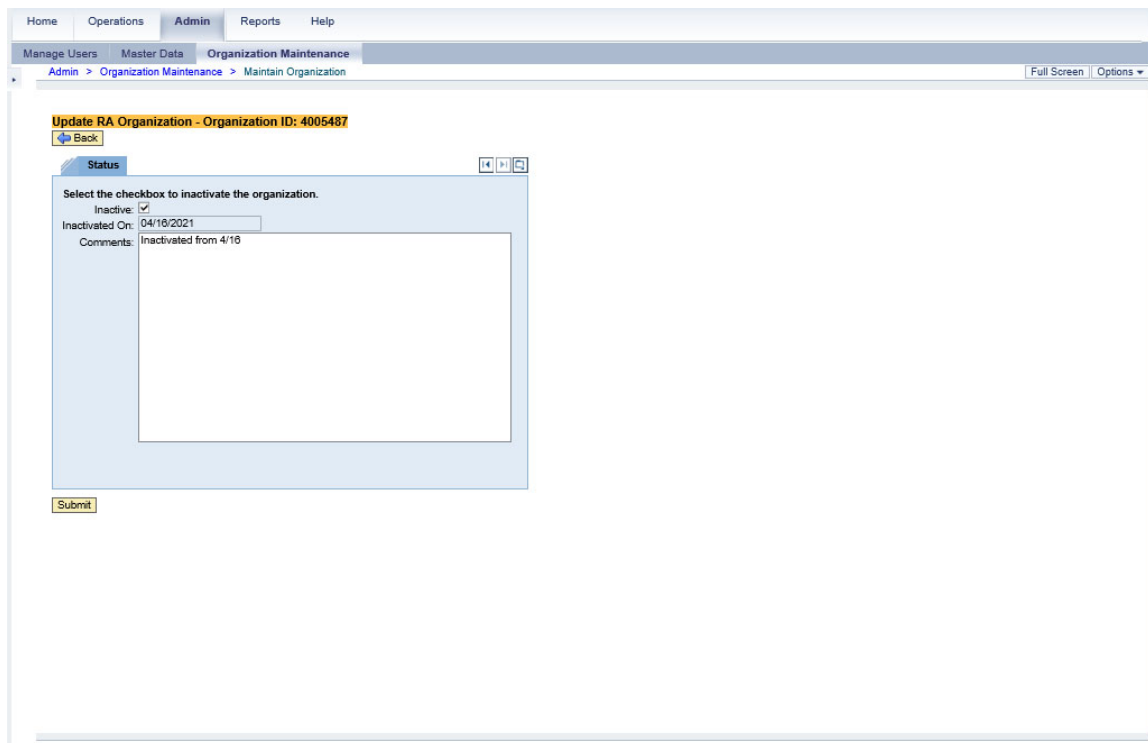
(Note) If  (the **Inactive** checkbox) is selected, deselecting will make the RA active. Also, the date from the **Inactivated On** field will be cleared automatically, as the organization is not inactive anymore.

22. If necessary, enter any business reasons for active/inactive change in the **Comments** field. In this example, **Inactivated from 4/16** is entered.



(Note) When  (the **Inactive** checkbox) is checked, the **Inactivated On** field is auto-populated with the date the organization was inactivated. This field is not editable.

#### Image: Maintain Organization Screen

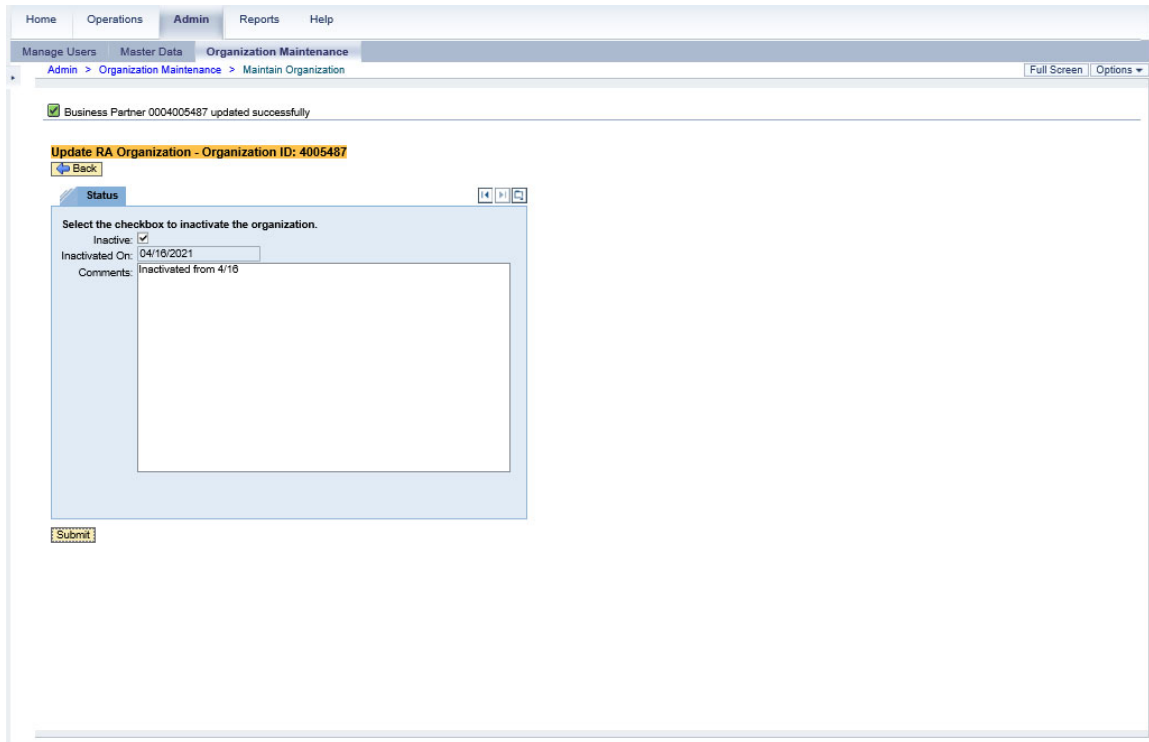


23. Click  (the **Submit** button) to update the RA after entering the desired information on all the tabs.



(Note) A confirmation message displays: *"Business Partner XXXXXX updated successfully."*

**Image: Maintain Organization Screen**



24. The transaction is complete.





Work Instruction  
Maintain Recipient Agency (RA)

**RESULT**

Updates to the RA organization were made in WBSCM, which may include changes to the address information, assigned national warehouse(s), ship-to location(s) and/or program(s), optional identifiers for the organization, as well as activation or inactivation of the RA organization.



## PROCESS OVERVIEW

### Purpose

The purpose of this transaction is to update a Recipient Agency (RA) organization in WBSCM by an SDA Org Admin. There are two options for updating:

1. Enter updates with the [Maintain RA Organization](#) transaction.
2. Upload an XML file containing the information to be updated.

This document reviews steps to upload an XML file.

### Process Trigger

An update to an RA Organization is required.

### Prerequisites

- The RA must exist in WBSCM.
- An XML file must exist on the user's computer.

### Portal Path

Follow the Portal path to complete this transaction:

- Select **Admin** tab → **Organization Maintenance** tab → **Upload RA Updates** link to go to the *Upload RA Updates* 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.

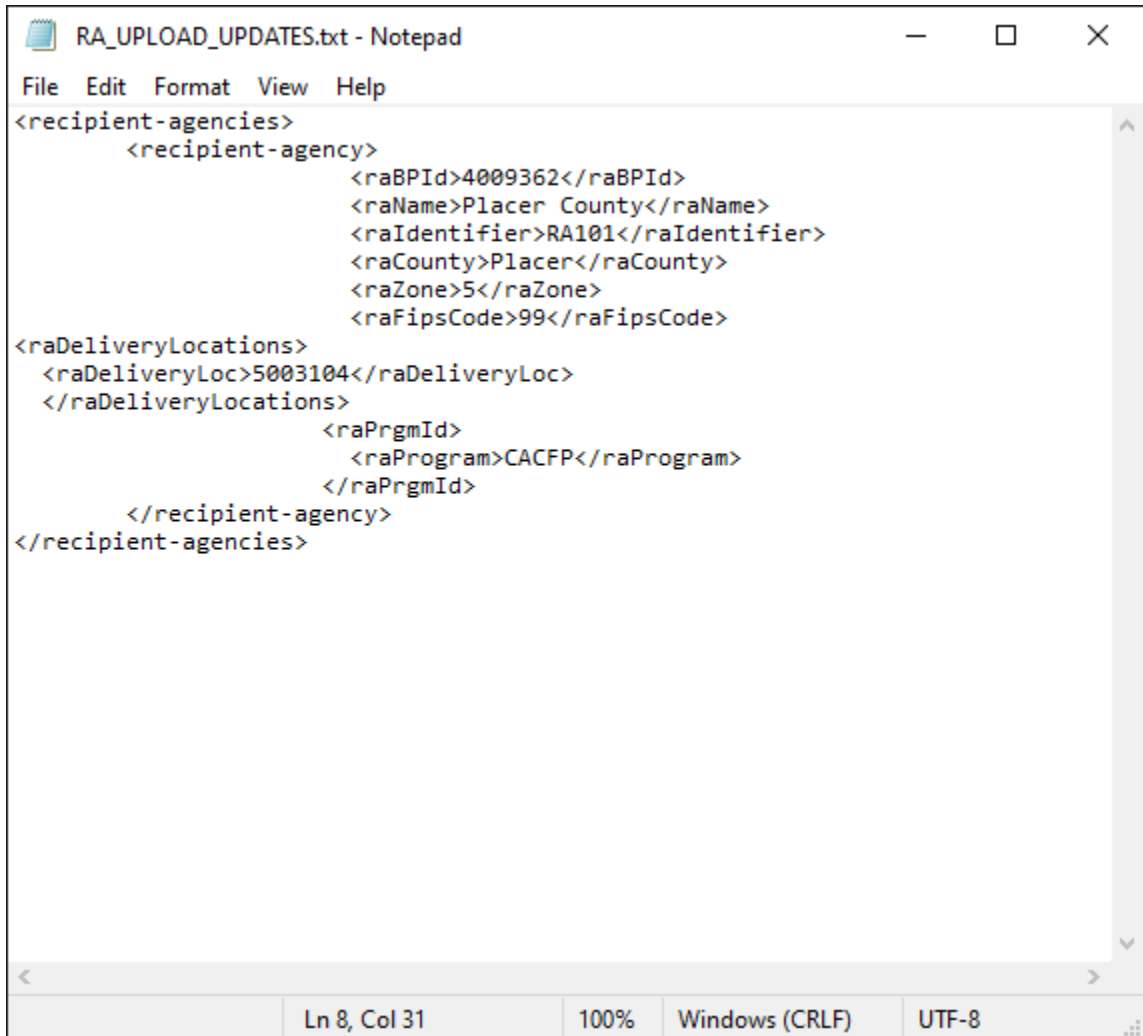
## PROCEDURE

1. Open the XML file.



(Note) The XML file must contain all RA maintenance fields and data in the correct format to for a successful upload.

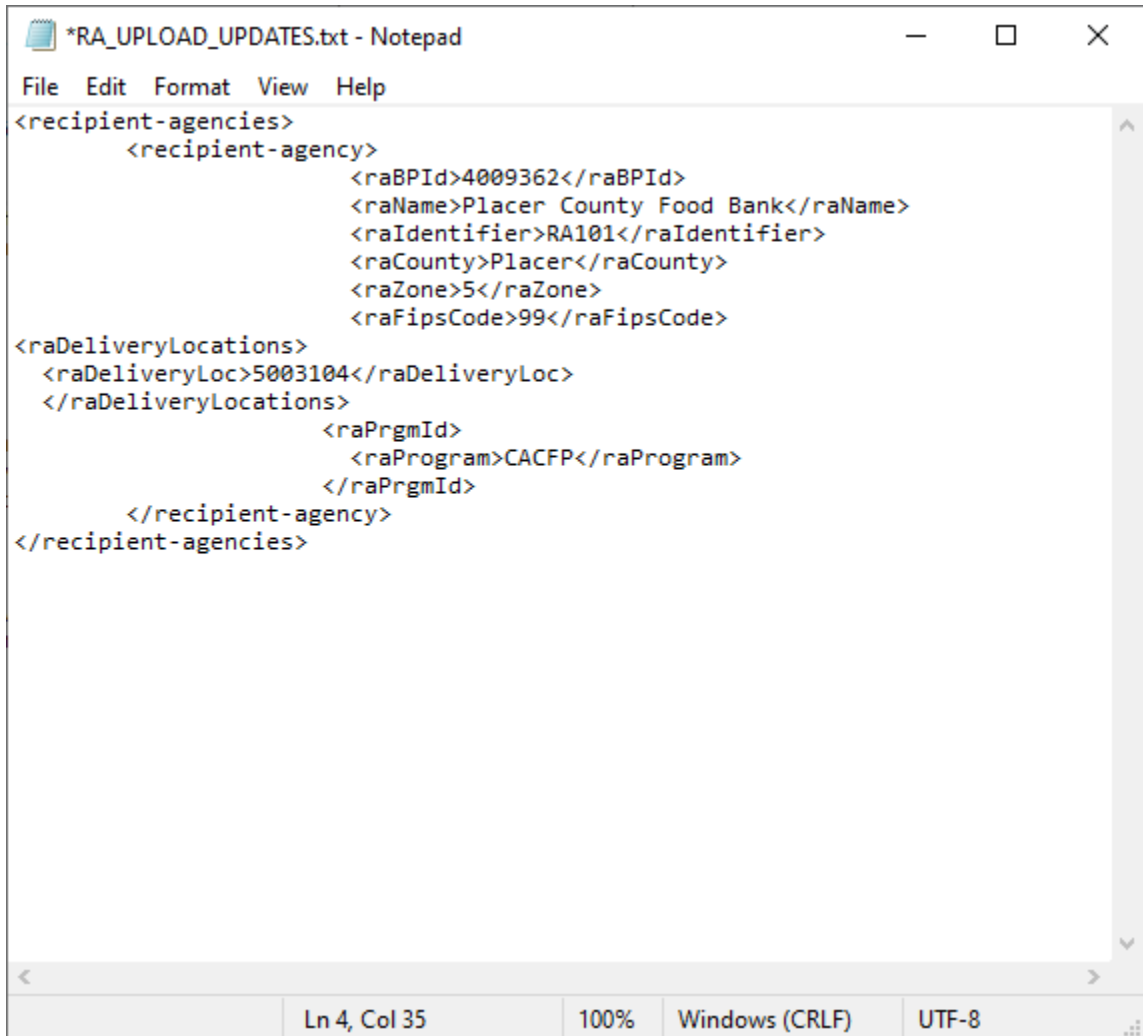
### Image: Notepad Screen



```
RA_UPLOAD_UPDATES.txt - Notepad
File Edit Format View Help
<recipient-agencies>
  <recipient-agency>
    <raBPIId>4009362</raBPIId>
    <raName>Placer County</raName>
    <raIdentifier>RA101</raIdentifier>
    <raCounty>Placer</raCounty>
    <raZone>5</raZone>
    <raFipsCode>99</raFipsCode>
  <raDeliveryLocations>
    <raDeliveryLoc>5003104</raDeliveryLoc>
  </raDeliveryLocations>
  <raPrgmId>
    <raProgram>CACFP</raProgram>
  </raPrgmId>
</recipient-agency>
</recipient-agencies>
Ln 8, Col 31 100% Windows (CRLF) UTF-8
```

2. Update the XML as necessary. In this example, the **<raName>** field is changed to **Placer County Food Bank**.

Image: Notepad Screen

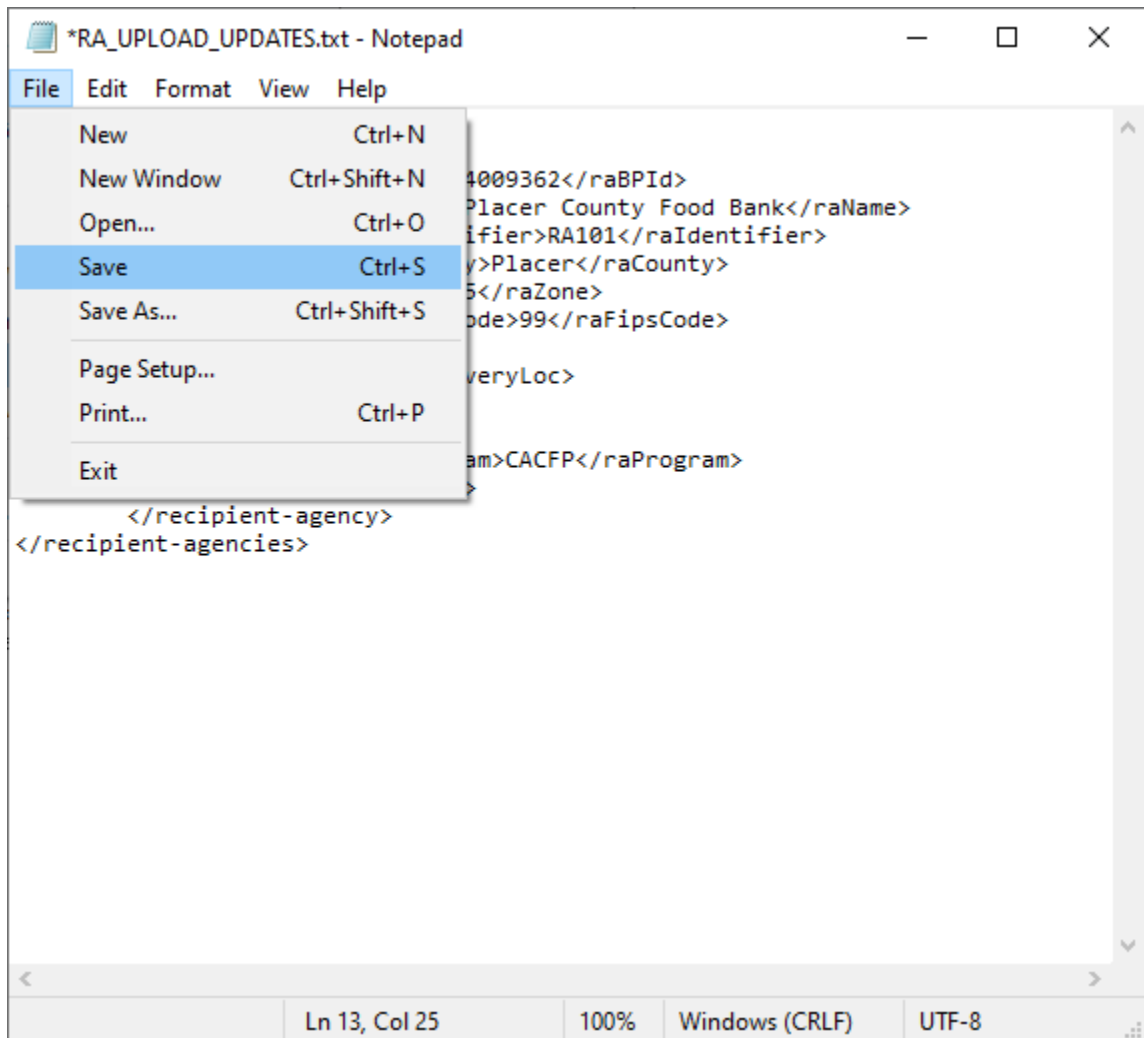


```
*RA_UPLOAD_UPDATES.txt - Notepad
File Edit Format View Help
<recipient-agencies>
  <recipient-agency>
    <raBPIId>4009362</raBPIId>
    <raName>Placer County Food Bank</raName>
    <raIdentifier>RA101</raIdentifier>
    <raCounty>Placer</raCounty>
    <raZone>5</raZone>
    <raFipsCode>99</raFipsCode>
  <raDeliveryLocations>
    <raDeliveryLoc>5003104</raDeliveryLoc>
  </raDeliveryLocations>
    <raPrgmId>
      <raProgram>CACFP</raProgram>
    </raPrgmId>
  </recipient-agency>
</recipient-agencies>
```

Ln 4, Col 35 | 100% | Windows (CRLF) | UTF-8

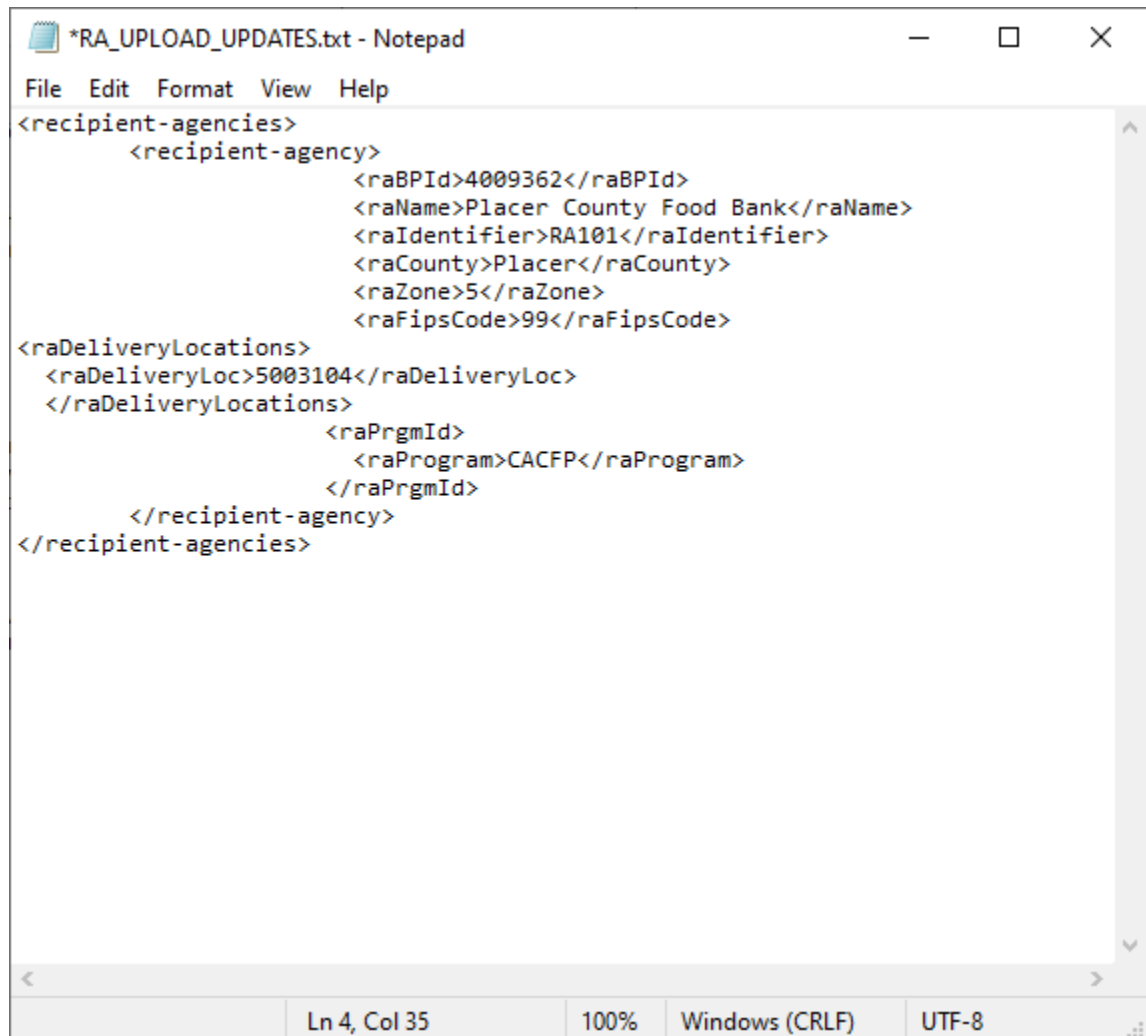
3. Select **File** (the **File** menu option).

Image: Notepad Screen




4. Select **Save** (the **Save** option).

Image: Notepad Screen



```
*RA_UPLOAD_UPDATES.txt - Notepad
File Edit Format View Help
<recipient-agencies>
  <recipient-agency>
    <raBPIId>4009362</raBPIId>
    <raName>Placer County Food Bank</raName>
    <raIdentifier>RA101</raIdentifier>
    <raCounty>Placer</raCounty>
    <raZone>5</raZone>
    <raFipsCode>99</raFipsCode>
  <raDeliveryLocations>
    <raDeliveryLoc>5003104</raDeliveryLoc>
  </raDeliveryLocations>
    <raPrgmId>
      <raProgram>CACFP</raProgram>
    </raPrgmId>
  </recipient-agency>
</recipient-agencies>
Ln 4, Col 35    100%    Windows (CRLF)    UTF-8
```

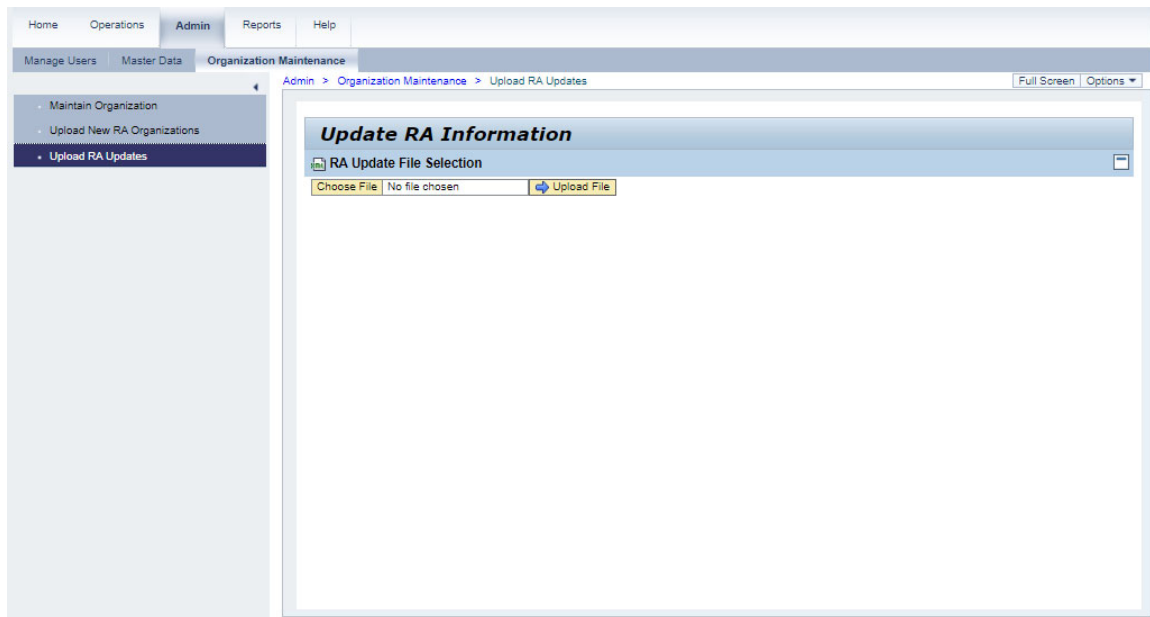
5. Click  (the **Close** button).




(Note) After closing the XML file, navigate to the *Upload RA Updates* screen on the portal to upload the XML file.

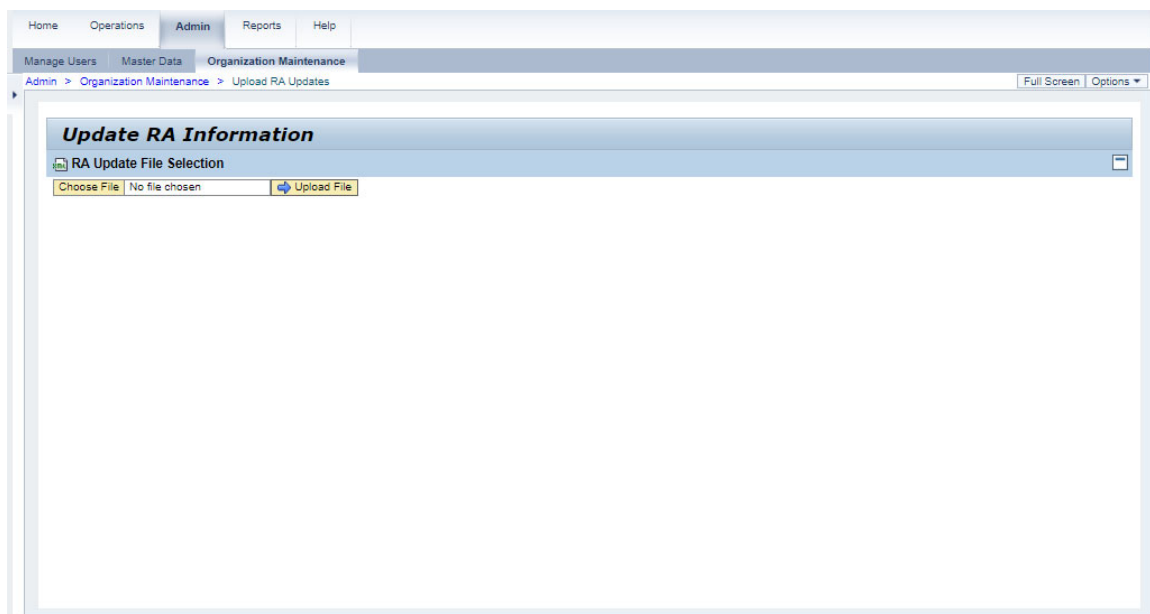
6. Start the transaction using the Portal path: **Admin** tab → **Organization Maintenance** tab → **Upload RA Updates** link.

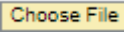
**Image: Upload RA Updates Screen**



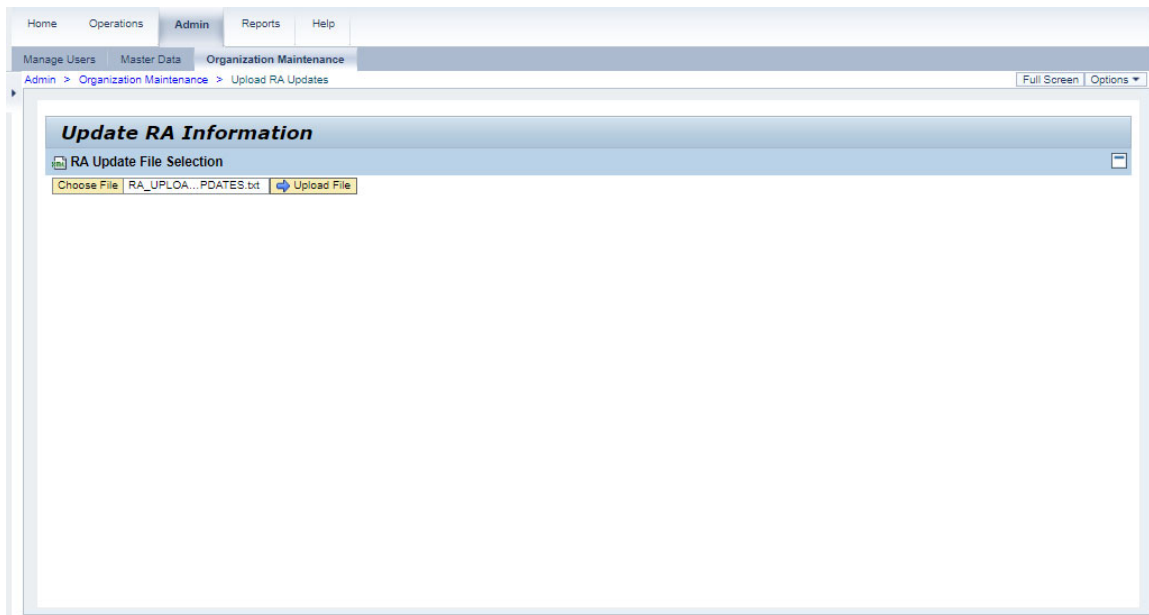
7. Click  (the **Hide Navigator** arrow) to minimize the Portal menu. Note that this can be done with any transaction in WBSCM.

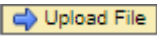
**Image: Upload RA Updates Screen**



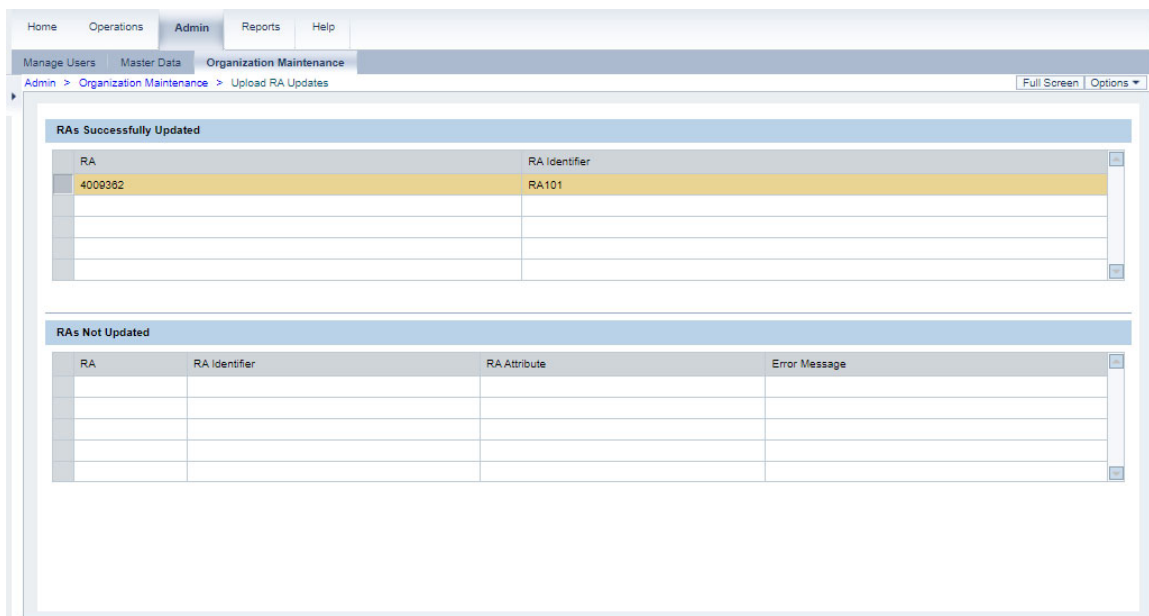
8. Click  (the **Choose File** button) to locate the file to be uploaded. In this example, the **RA\_UPLOAD\_UPDATES.txt** file was located.

### Upload RA Updates Screen



9. Click  (the **Upload File** button).

### Upload RA Updates Screen



10. Review the *RAs Successfully Updated* section.



(Note) The following display:

- Business Partner Number in the **RA** column
- **RA Identifier** of the RA that was modified.

11. The transaction is complete.





Work Instruction  
Upload RA Updates

**RESULT**

The RA organization was updated by uploading an XML file to WBSCM.



## PROCESS OVERVIEW

### Purpose

The purpose of this procedure is to assist State Distributing Agency (SDA)/Indian Tribal Organization (ITO) Org Admins in assigning or un-assigning ship-to organizations to the Recipient Agencies (RAs) within their organizational hierarchy. While SDA/ITO Org Admins may manually update ship-to organization business partner relationships for RAs individually when needed, they can efficiently mass assign or un-assign ship-to organizations to multiple RAs in one transaction.

### Process Trigger

Use this transaction to mass assign or un-assign ship-to organizations to RAs.

### Prerequisites

- User ID must have the SDA/ITO Org Admin security role assigned to it.
- Ship-to organization must exist in WBSCM.
- RA must exist in WBSCM.
- The user's SDA/ITO must have RAs.

### Portal Path

Follow the Portal path below to complete this transaction:

- Select **Admin** tab → **Organization Maintenance** tab → **Maintain Organization** link → **Mass Assign/Un-assign Ship-To** link to go to the **Mass Assign/Un-assign Ship-To** screen.

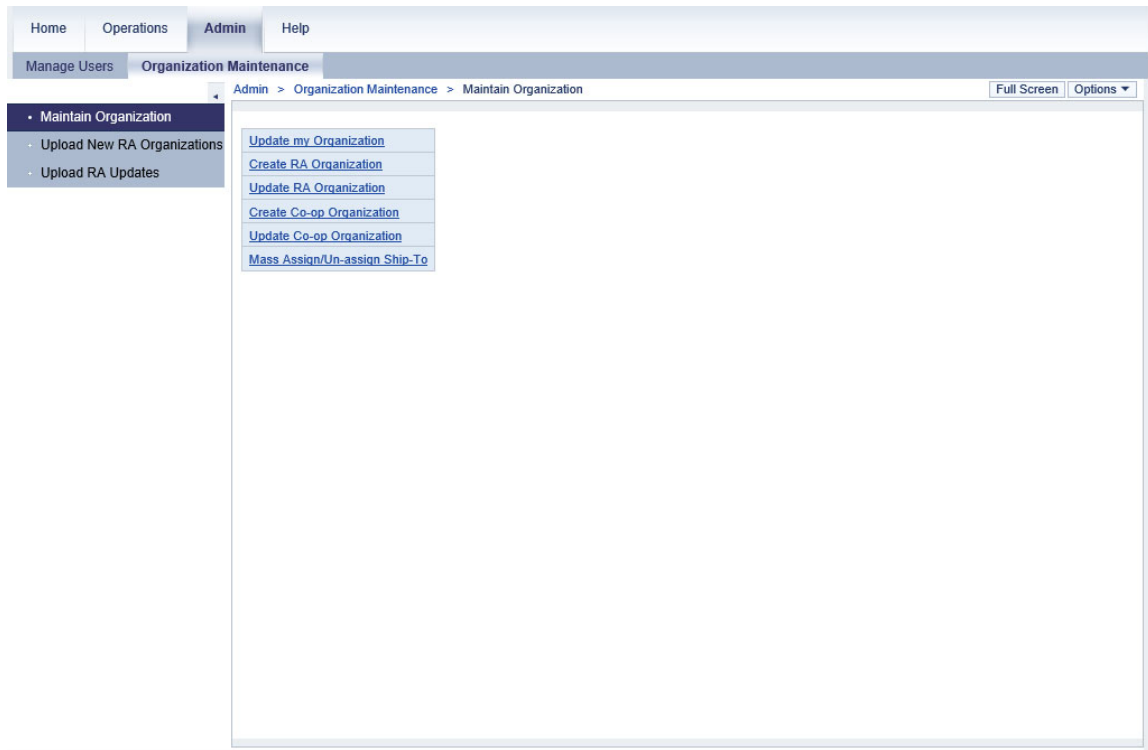
### Tips and Tricks


- 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 Portal Basic Navigation course for tips on creating favorites, performing searches, etc.

## PROCEDURE

1. Select **Admin** tab → **Organization Maintenance** tab → **Maintain Organization** link.

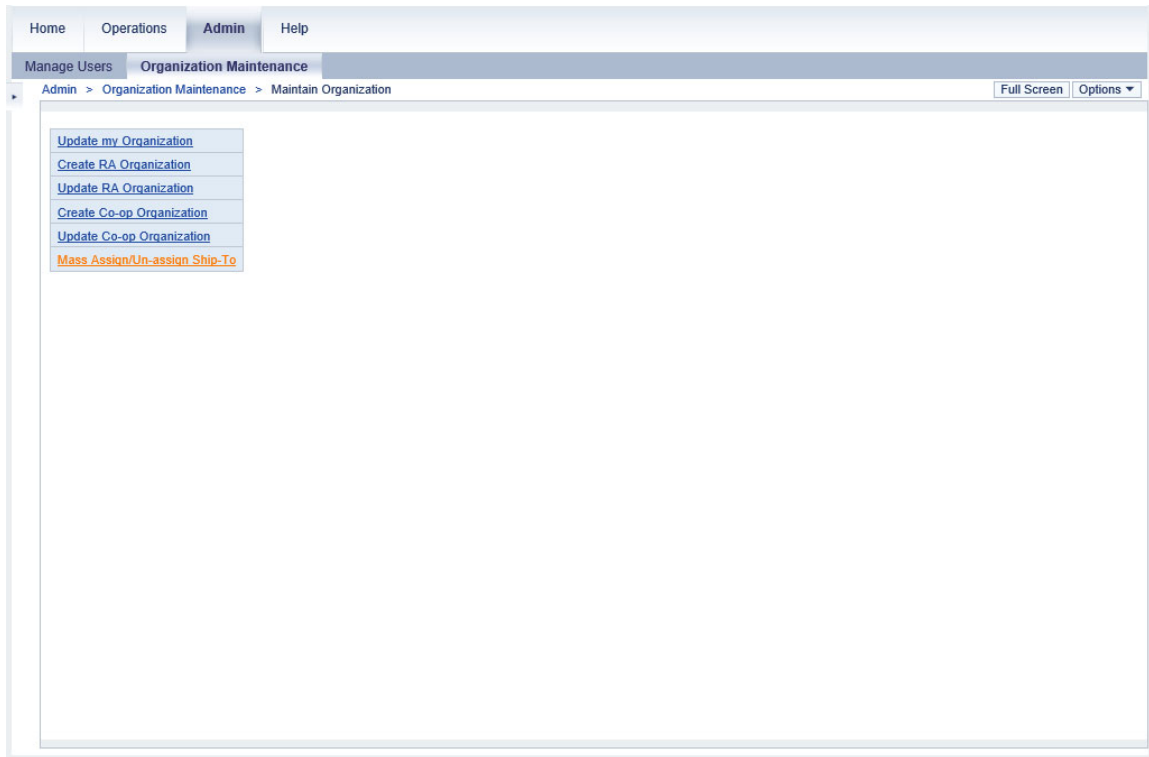
### Maintain Organization Screen



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

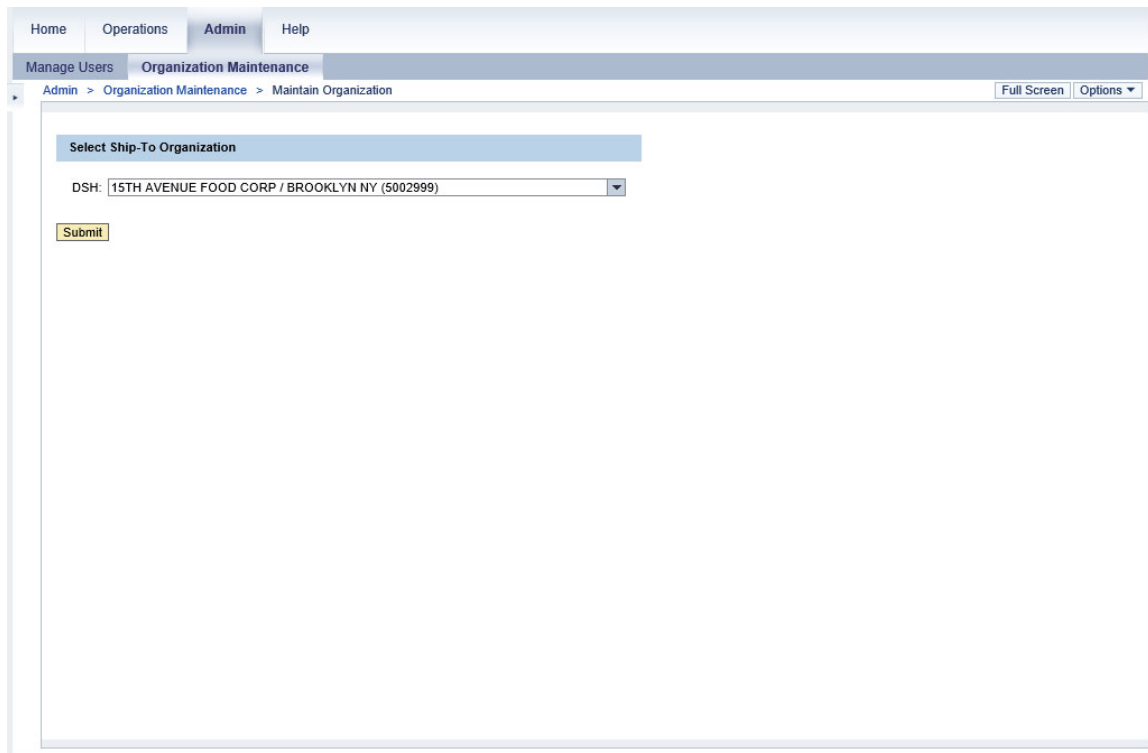


### Maintain Organization Screen




3. Click [Mass Assign/Un-assign Ship-To](#) (the **Mass Assign/Un-assign Ship-To** link) to mass assign/un-assign RAs to ship-to locations.

## Maintain Organization Screen



The screenshot shows a web application interface for maintaining organizations. At the top, there are navigation tabs: Home, Operations, Admin, and Help. Below these are sub-tabs: Manage Users and Organization Maintenance. The current page is 'Maintain Organization', with a breadcrumb trail: Admin > Organization Maintenance > Maintain Organization. There are 'Full Screen' and 'Options' buttons in the top right. The main content area has a header 'Select Ship-To Organization' and a dropdown menu labeled 'DSH:' with the selected value '15TH AVENUE FOOD CORP / BROOKLYN NY (5002999)'. A 'Submit' button is located below the dropdown.

4. Click  (the **DSH:** drop-down) to view the available ship-to organizations assigned to SDA/ITO by FNS.



(Note) Type the first letter of the ship-to organization to go to the ship-to organizations that start with that letter.



(Note) To request a new ship-to organization for the SDA/ITO, domestic business partners should email FNS at [WBSCM-Ship-To@fns.usda.gov](mailto:WBSCM-Ship-To@fns.usda.gov). FNS will create or modify the ship-to organization, as needed, and assign it to the organization.



### Maintain Organization Screen

Home Operations Admin Help

Manage Users Organization Maintenance

Admin > Organization Maintenance > Maintain Organization Full Screen Options

Select Ship-To Organization

DSH: 15TH AVENUE FOOD CORP / BROOKLYN NY (5002999)

Submit 20TH CENTURY / PALMER CA (5001416)

21ST CENTURY FOODS LTD / DALLAS TX (5002705)

21ST CENTURY FOODS LTD / SAN ANTONIO TX (5002908)

21ST CENTURY FOODS LTD / WAELDER TX (5002857)

32 COLD / LOS ANGELES CA (5004520)

4U2U / MINNETONKA MN (5003951)

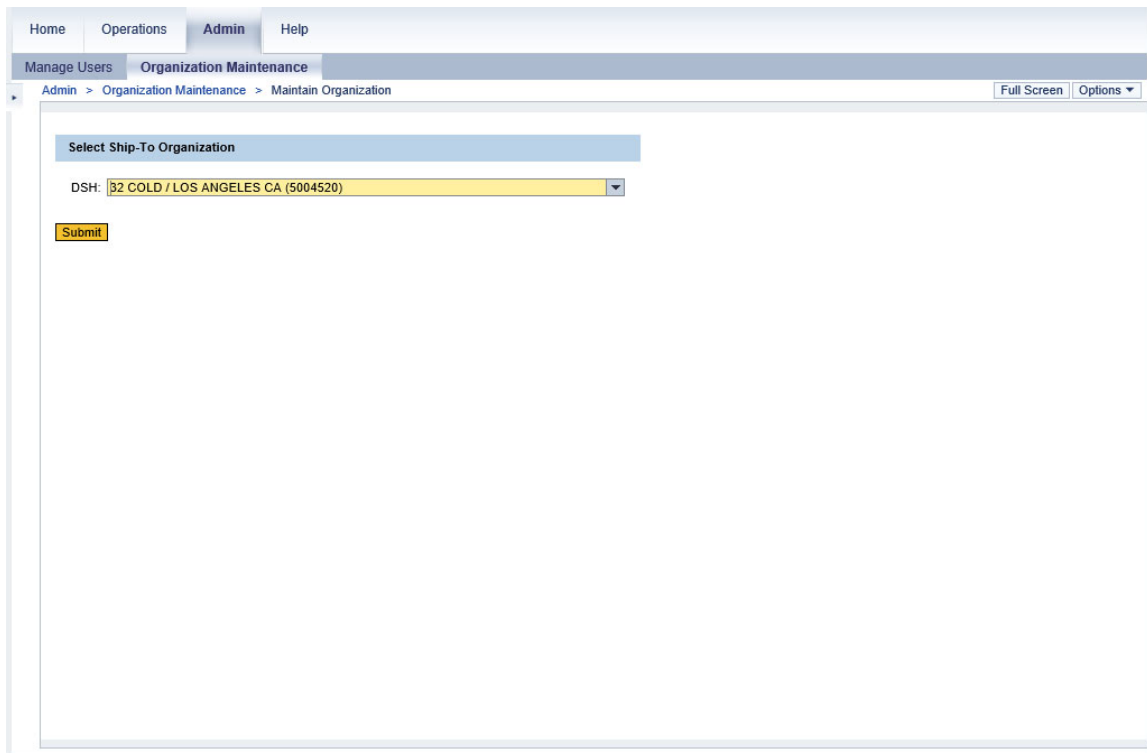
4U2U- INACTIVE / GREENDALE IN (5003952)

A & D COLD STORAGE INC / WORCESTER MA (5002837)

A & V PASTA PRODUCTS / CLEVELAND OH (5001859)

5. Select the ship-to organization to assign or un-assign to RAs. In this example, we selected **32 COLD / LOS ANGELES CA (5004520)** (the **32 COLD / LOS ANGELES CA (5004520)** option).

## Maintain Organization Screen




6. Click  (the **Submit** button) to submit the selection.

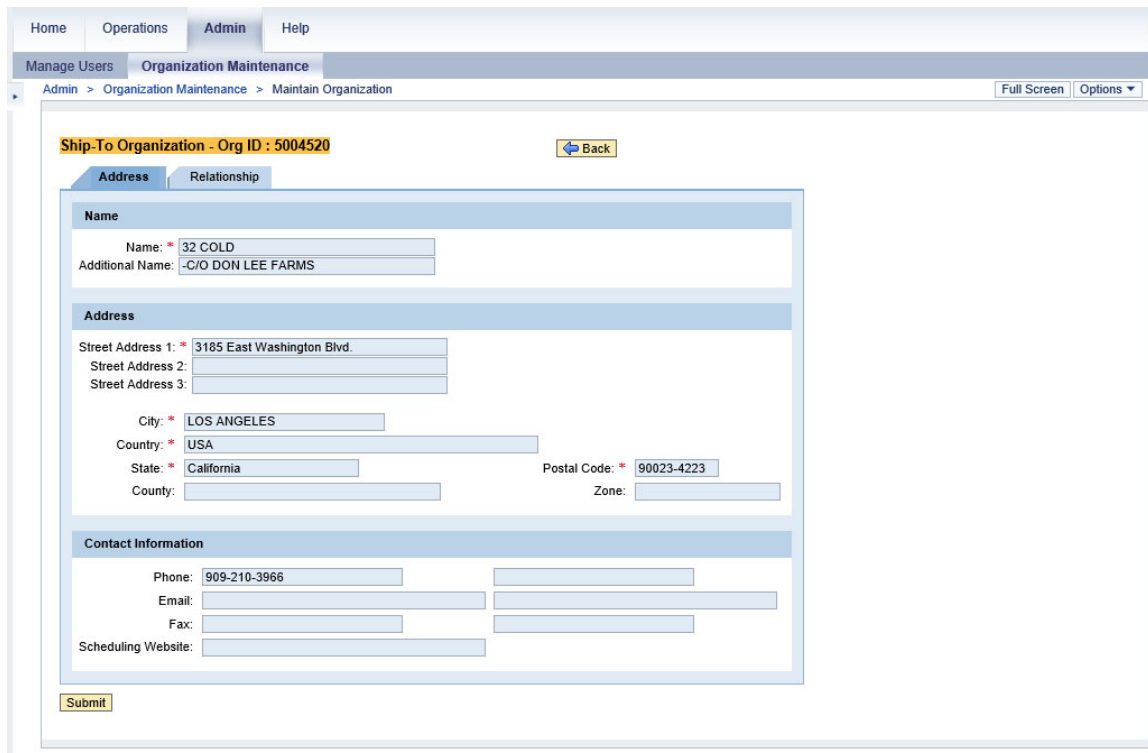


(Note) The ship-to organization details display in view-only mode. The **Address** tab contains details about the location and contact information for the ship-to organization. The **Relationship** tab displays the ship-to organization's relationships with RAs in the SDA/ITO's organizational hierarchy.



(Note) Use  (the **Back** button) at any point in the transaction to return to the list of Maintain Organization transactions (Step 3).

## Maintain Organization Screen



Home Operations Admin Help

Manage Users Organization Maintenance

Admin > Organization Maintenance > Maintain Organization Full Screen Options

Ship-To Organization - Org ID : 5004520 Back

Address Relationship

**Name**

Name: \* 32 COLD  
Additional Name: -C/O DON LEE FARMS

**Address**

Street Address 1: \* 3185 East Washington Blvd.  
Street Address 2:  
Street Address 3:

City: \* LOS ANGELES  
Country: \* USA  
State: \* California Postal Code: \* 90023-4223  
County: Zone:

**Contact Information**

Phone: 909-210-3966  
Email:  
Fax:  
Scheduling Website:

Submit

7. Click **Relationship** (the **Relationship** tab) to access the existing business partner relationships.



### Maintain Organization Screen

8. Perform one or more of the following:

If	Then
The existing relationship between the ship-to organization and the RAs needs to be removed.	Go to step 9.
New relationships need to be assigned to the ship-to organization and RAs.	Go to step 13.
No other changes are needed.	Go to step 15.



(Note) The RAs are listed in ascending order by business partner number. Use the vertical scrollbar to find the appropriate RAs.



(Note) To select multiple business partners:

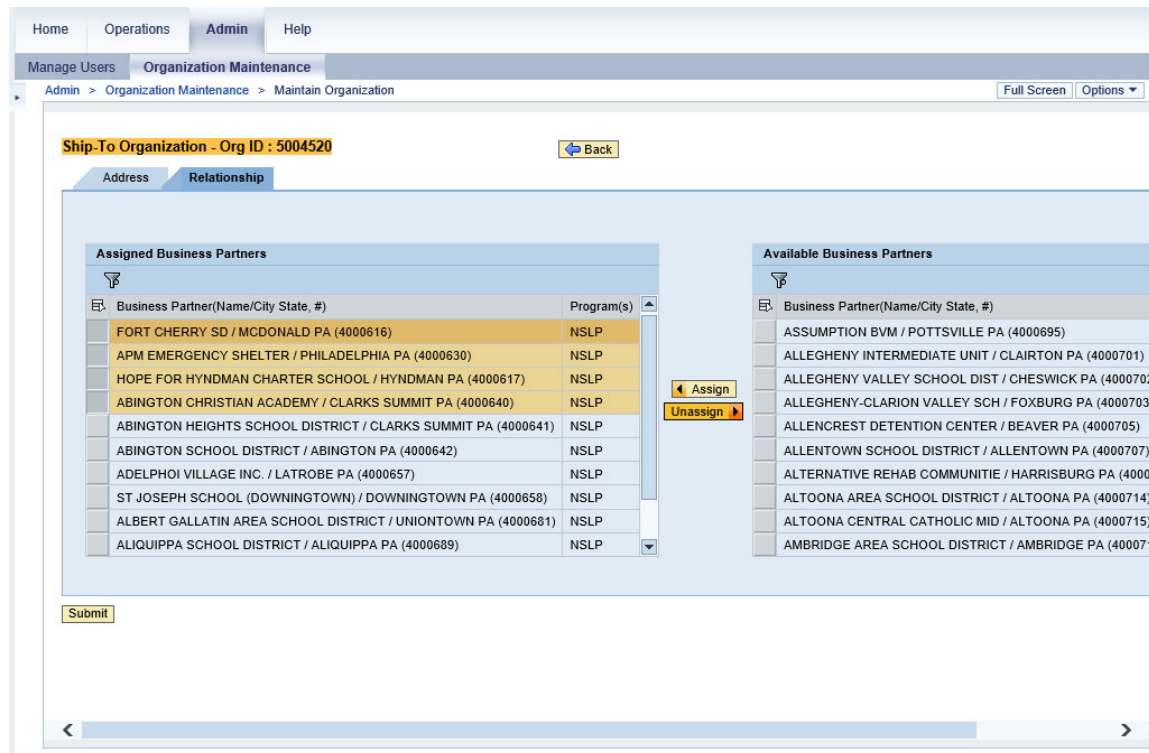
If the business partners are listed in consecutive rows, hold down the **Shift** key and click the first and last selection boxes.


To select business partners from non-consecutive rows, hold down the **Ctrl** key while clicking each selection box.




(Note) The **Available Business Partners** panel will not include RA organizations that have been archived or marked for deletion.

### Maintain Organization Screen



9. Select  (the **Selection** box) next to the RA(s) from the **Assigned Business Partners** panel to be removed from this ship-to organization. In this example, we selected the **FORT CHERRY SD / MCDONALD PA (4000616)**, **APM EMERGENCY SHELTER / PHILADELPHIA PA (4000630)**, **HOPE FOR HYNDMAN CHARTER SCHOOL / HYNDMAN PA (4000617)**, and **ABINGTON CHRISTIAN ACADEMY / CLARKS SUMMIT PA (4000640)**.



(Note) Use  (the **Filters** icon) to quickly search for an RA. Additionally, use "\*" (the **Asterisk** symbol) as a wildcard at the beginning of the search term (e.g., \*DEPT) to search for an RA that starts with the term or use the asterisk symbol at the beginning and the end of the search term (e.g., \*SCHOOL\*) to search for an RA that contains the term.


10. Click  (the **Unassign** button) to remove the relationship.




(Note) The selected RAs are moved to the **Assigned Business Partner** panel.


11. Go to step 8.

### Maintain Organization Screen

12. Select  (the **Selection** box) next to the RA(s) from the **Available Business Partners** panel to be assigned to this ship-to organization. In this example, we selected the **ASSUMPTION BVM / POTTSVILLE PA (4000695)**, **ALL EGENY INTERMEDIATE UNIT / CLAIRTON PA (4000701)**, **ALLEGHENY VALLEY SCHOOL DIST / CHESWICK PA (4000702)**, and **ALLEGHENY-CLARION VALLEY SCH / FOXBURG PA (4000703)**.



(Note) Use  (the **Filters** icon) to quickly search for an RA. Additionally, use "\*" (the **Asterisk** symbol) as a wildcard at the beginning of the search term (e.g., \*DEPT) to search for an RA that starts with the term or use the asterisk symbol at the beginning of the term.

13. Click  (the **Assign** button) to create a relationship between the ship-to organization and the selected RAs.



(Note) The selected RAs are moved to the **Assigned Business Partner** panel.

14. Go to Step 8.

### Maintain Organization Screen

Home | Operations | Admin | Help

Manage Users | Organization Maintenance

Admin > Organization Maintenance > Maintain Organization [Full Screen] [Options]

Ship-To Organization - Org ID : 5004520 [Back]

Address | Relationship

**Assigned Business Partners**

Business Partner(Name/City State, #)	Program(s)
FORT CHERRY SD / MCDONALD PA (4000616)	NSLP
APM EMERGENCY SHELTER / PHILADELPHIA PA (4000630)	NSLP
HOPE FOR HYNDMAN CHARTER SCHOOL / HYNDMAN PA (4000617)	NSLP
ABINGTON CHRISTIAN ACADEMY / CLARKS SUMMIT PA (4000640)	NSLP
ABINGTON HEIGHTS SCHOOL DISTRICT / CLARKS SUMMIT PA (4000641)	NSLP
ABINGTON SCHOOL DISTRICT / ABINGTON PA (4000642)	NSLP
ADELPHOI VILLAGE INC. / LATROBE PA (4000657)	NSLP
ST JOSEPH SCHOOL (DOWNINGTOWN) / DOWNINGTOWN PA (4000658)	NSLP
ALBERT GALLATIN AREA SCHOOL DISTRICT / UNIONTOWN PA (4000681)	NSLP
ALIQUIPPA SCHOOL DISTRICT / ALIQUIPPA PA (4000689)	NSLP

[Assign] [Unassign]

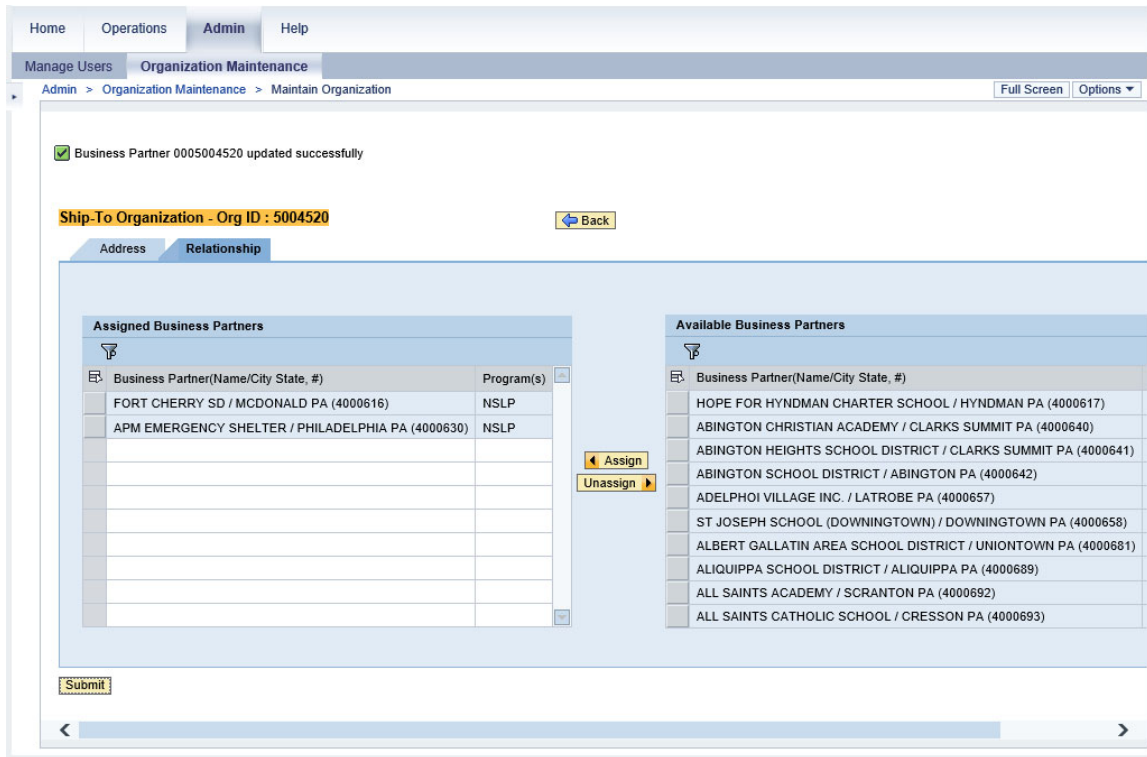
**Available Business Partners**

Business Partner(Name/City State, #)
ALLENCREST DETENTION CENTER / BEAVER PA (4000705)
ALLENTOWN SCHOOL DISTRICT / ALLENTOWN PA (4000707)
ALTERNATIVE REHAB COMMUNITIE / HARRISBURG PA (4000708)
ALTOONA AREA SCHOOL DISTRICT / ALTOONA PA (4000714)
ALTOONA CENTRAL CATHOLIC MID / ALTOONA PA (4000715)
AMBRIDGE AREA SCHOOL DISTRICT / AMBRIDGE PA (4000716)
ANNUNCIATION BVM SCHOOL / MCSHERRYSTOWN PA (4000717)
ANNVILLE-CLEONA SCHOOL DISTR / ANNVILLE PA (4000740)
ANTIETAM SCHOOL DISTRICT / READING PA (4000746)
APOLLO RIDGE SCHOOL DISTRICT / SPRING CHURCH PA (4000747)

[Submit]

- Click **Submit** (the **Submit** button) to update the ship-to organization's business partner relationships.

### Maintain Organization Screen



Home Operations Admin Help

Manage Users Organization Maintenance

Admin > Organization Maintenance > Maintain Organization Full Screen Options

Business Partner 0005004520 updated successfully

**Ship-To Organization - Org ID : 5004520** Back

Address Relationship

Assigned Business Partners		Available Business Partners	
Business Partner(Name/City State, #)	Program(s)	Business Partner(Name/City State, #)	
FORT CHERRY SD / MCDONALD PA (4000616)	NSLP	HOPE FOR HYNDMAN CHARTER SCHOOL / HYNDMAN PA (4000617)	
APM EMERGENCY SHELTER / PHILADELPHIA PA (4000630)	NSLP	ABINGTON CHRISTIAN ACADEMY / CLARKS SUMMIT PA (4000640)	
		ABINGTON HEIGHTS SCHOOL DISTRICT / CLARKS SUMMIT PA (4000641)	
		ABINGTON SCHOOL DISTRICT / ABINGTON PA (4000642)	
		ADELPHOI VILLAGE INC. / LATROBE PA (4000657)	
		ST JOSEPH SCHOOL (DOWNTOWN) / DOWNTOWN PA (4000658)	
		ALBERT GALLATIN AREA SCHOOL DISTRICT / UNIONTOWN PA (4000681)	
		ALIQUIPPA SCHOOL DISTRICT / ALIQUIPPA PA (4000689)	
		ALL SAINTS ACADEMY / SCRANTON PA (4000692)	
		ALL SAINTS CATHOLIC SCHOOL / CRESSON PA (4000693)	

Assign Unassign

Submit

16. The transaction is completed.



(Note) A confirmation message "**Business Partner 000500xxxx updated successfully**" displays, confirming that business partner relationships for this ship-to organization were updated in WBSCM.

If there is a problem with the update, an error message displays: Error updating ship-to relationships. Repeat this transaction from Step 3.



---

## RESULT

The ship-to organization has been assigned or unassigned to multiple Recipient Agencies (RAs) within the user's organizational hierarchy.



## PROCESS OVERVIEW

### Purpose

The purpose of this transaction is for State Distributing Agencies (SDAs) and Indian Tribal Organizations (ITOs) who place multi-food orders in WBSCM to establish non-delivery dates (dates when they will not be able to receive deliveries from the national warehouse). Using this transaction, an SDA or ITO may also display their current delivery calendar including all delivery and non-delivery dates and times already established in WBSCM.

### Process Trigger

Use this procedure to display your warehouse delivery schedule and to set up non-delivery dates.

### Prerequisites

- None.

### Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab → **Order Processing** tab → **NW Delivery Calendar** folder → **Maintain National Warehouse Delivery Calendar** link to go to the *Maintain National Warehouse Delivery Calendar* screen.

### Tips and Tricks

- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
  - A Conditional field: an entry that becomes required as a result of entering something previous to it, which then deems it required
  - An Optional field: you may enter information in an optional field, but an entry is not required for the completion of the transaction
- Refer to WBSCM Portal Basic Navigation course for tips on creating favorites, performing searches, etc.

### Reminders

- Remember to check your work
- Refer to the Help Option (to the right of the screen) in the Portal for further assistance.




## PROCEDURE

1. Start the transaction using the following Portal path: **Operations** tab → **Order Processing** tab → **NW Delivery Calendar** folder → **Maintain National Warehouse Delivery Calendar**

### Maintain National Warehouse Delivery Calendar Screen

The screenshot shows the 'Maintain National Warehouse Delivery Calendar' screen within the WBSM portal. The page header includes the USDA logo, 'United States Department of Agriculture', 'Web-Based Supply Chain Management', 'Welcome KY OrderManager', and a 'Log Off' button. The main navigation bar contains 'Home', 'Operations', 'Admin', 'Reports', and 'Help'. The 'Order Processing' section is active, showing the current page title and 'Back' and 'Forward' buttons. A 'Detailed Navigation' sidebar on the left lists various menu items, including 'File Uploads/Downloads', 'Catalog Maintenance', 'Order Management', 'Shipment Receipts', 'NW Delivery Calendar', and 'Maintain National Warehouse Delivery Calendar'. The main content area is titled 'Selection/Source Delivery Calendar' and contains a form with the following fields: 'Organization' (dropdown menu), 'Ship-To Location' (dropdown menu), 'Program' (text input), and 'Calendar Start Date' (calendar icon). A 'Go' button is located below the 'Calendar Start Date' field. The browser status bar at the bottom shows 'Done', 'Trusted sites', and '100%' zoom.

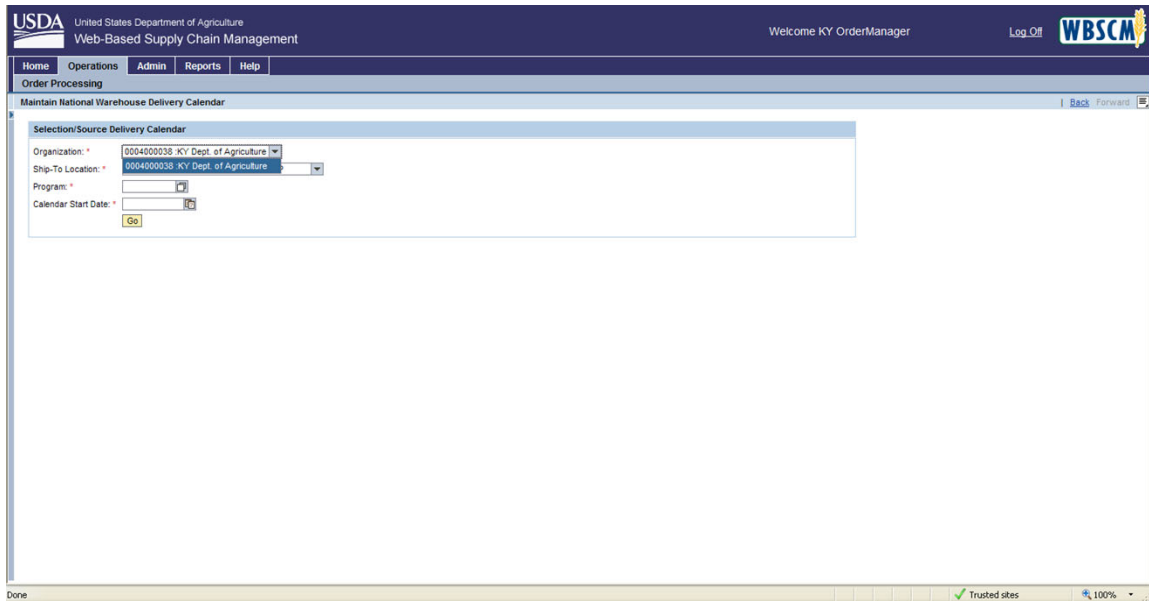
2. Click  (the **Hide Navigator** button) to minimize the Portal menu. Note that you can do this with any transaction in WBSM - not just fulfillment transactions.





# Work Instruction Set NW Non-Delivery Dates

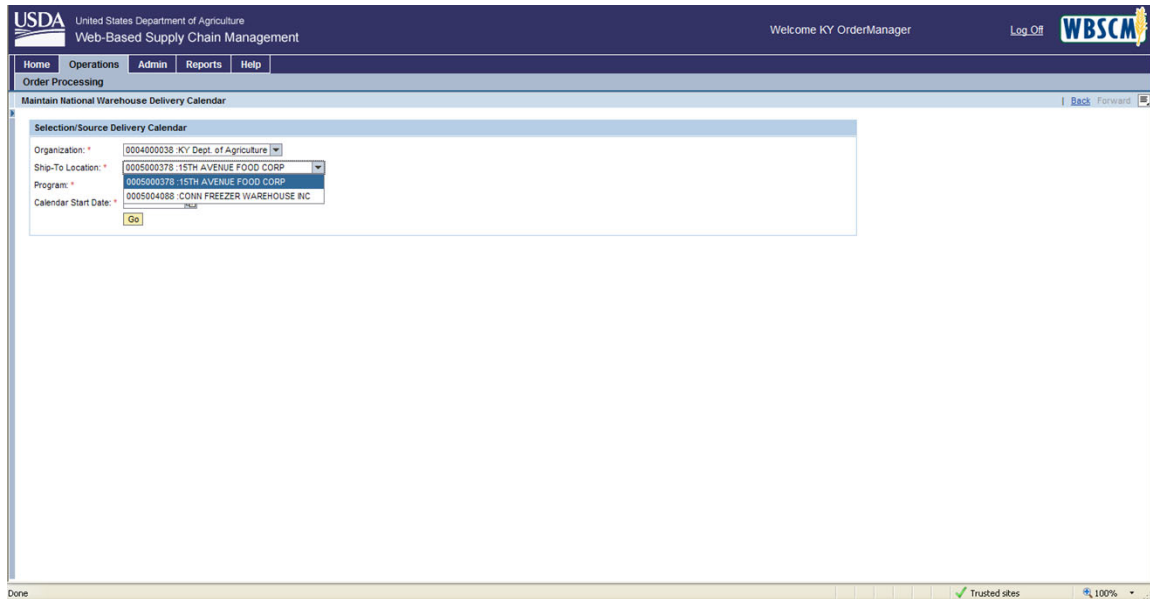
## Maintain National Warehouse Delivery Calendar Screen



3. In the **Organization** field, click  (the **Dropdown** button) to select the name of your SDA/ITO.

For this example, we selected (the **0004000038: KY Dept. of Agriculture** option) from the list to set up non-delivery dates for the Kentucky Department of Agriculture.


## Maintain National Warehouse Delivery Calendar Screen



The screenshot displays the 'Maintain National Warehouse Delivery Calendar' screen. The page header includes the USDA logo, 'United States Department of Agriculture', 'Web-Based Supply Chain Management', 'Welcome KY OrderManager', and 'Log Off' with the WBSCM logo. The navigation menu shows 'Home', 'Operations', 'Admin', 'Reports', and 'Help'. The main content area is titled 'Maintain National Warehouse Delivery Calendar' and contains a form with the following fields:

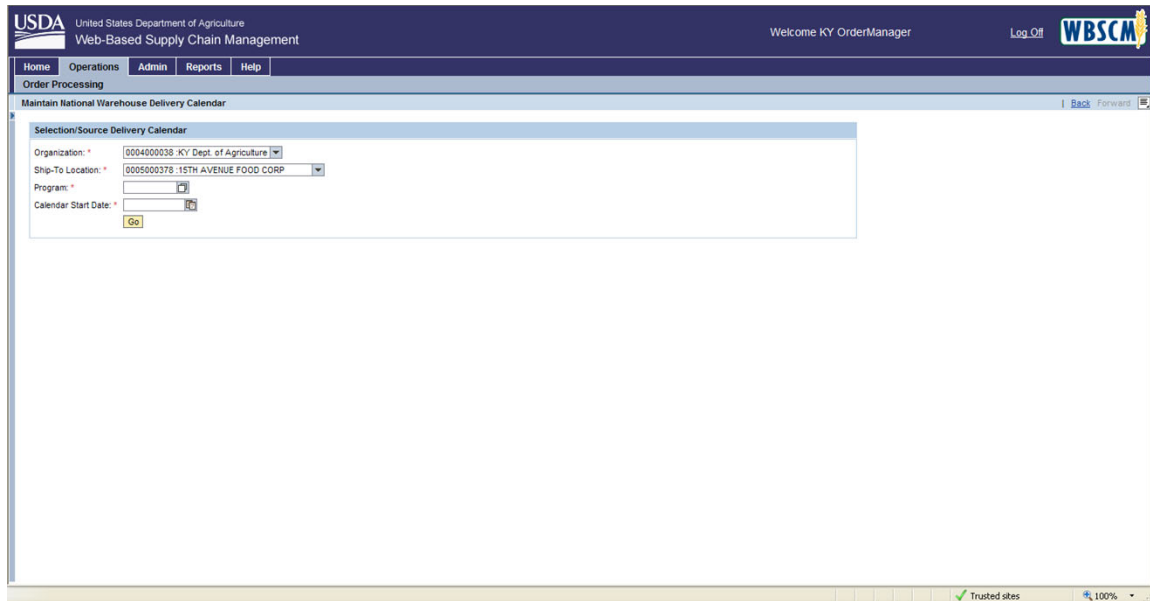
- Organization: 000400038 - KY Dept. of Agriculture
- Ship-To Location: 0005000378 - 15TH AVENUE FOOD CORP
- Program: 0005000378 - 15TH AVENUE FOOD CORP
- Calendar Start Date: 0005004088 - CONN FREEZER WAREHOUSE INC

A 'Go' button is located below the form. The browser status bar at the bottom shows 'Done', 'Trusted sites', and '100%' zoom.

4. In the **Ship-To Location** field, click  (the **Dropdown** button) to select a ship-to location.

For this example, we selected the **0005000378:15th Avenue Food Corp** option.

## Maintain National Warehouse Delivery Calendar Screen

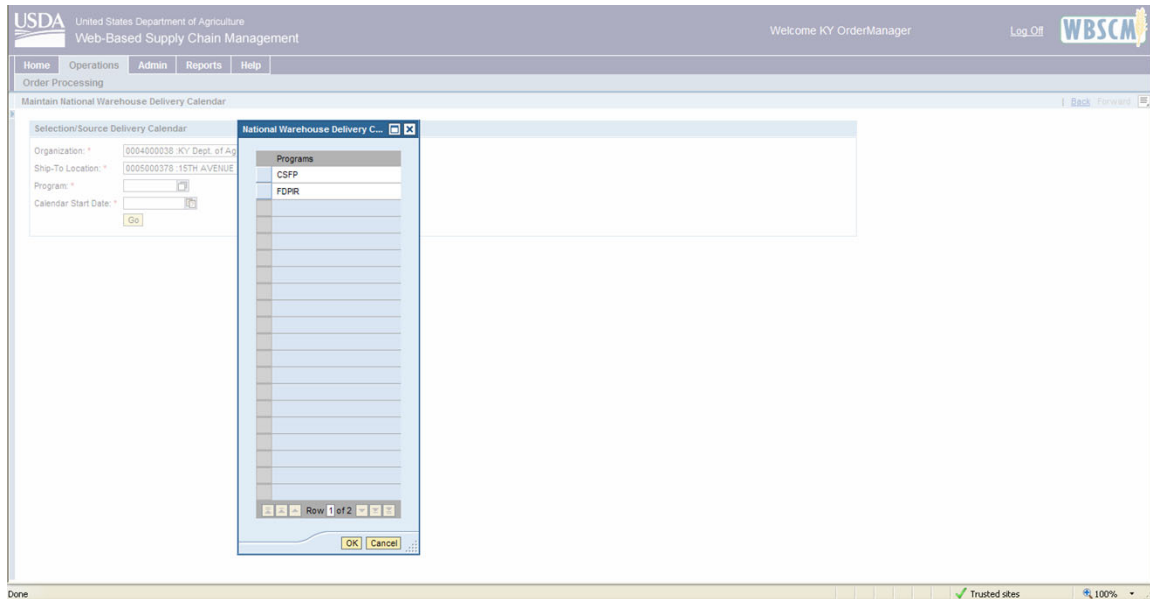



5. Click  (the **Matchcode** button) next to the **Program** field to select a program from a list of your associated programs.



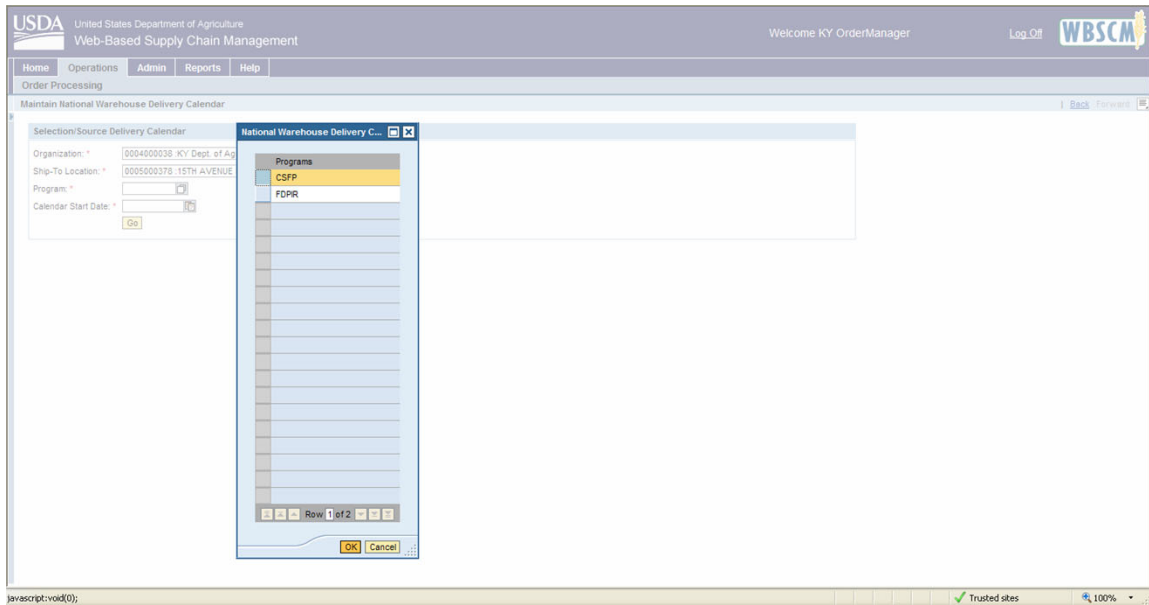
(Note) You can enter the program abbreviation directly into the field. For example, CSFP.


### Maintain National Warehouse Delivery Calendar Screen



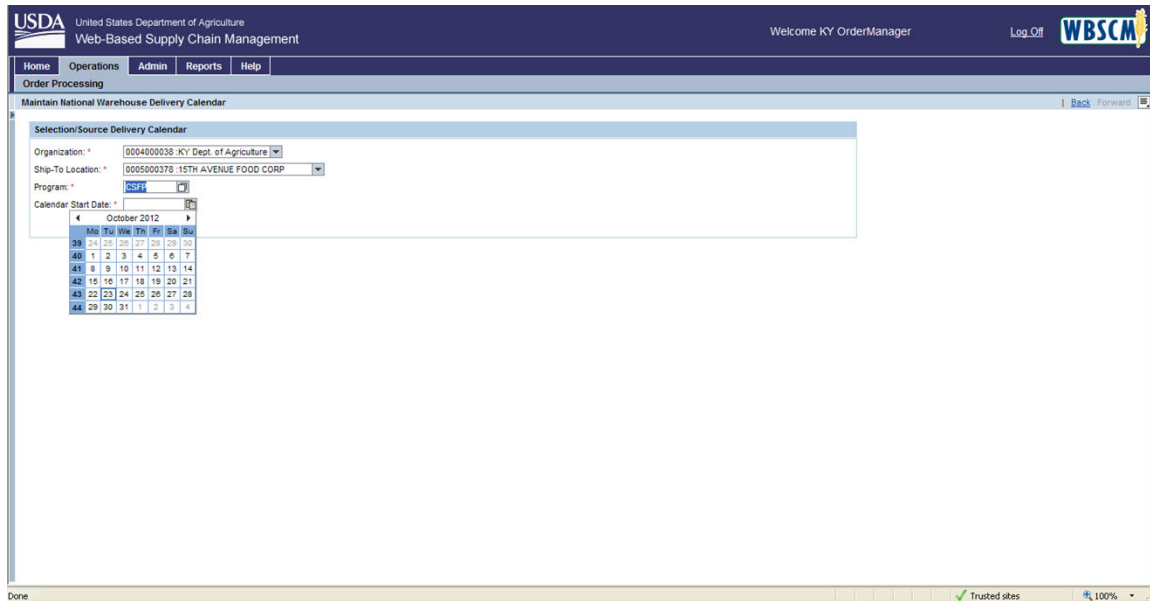
6. Click  (the **Blue Box**) next to the appropriate program option. In this case, we selected the **CSFP** option.

### Maintain National Warehouse Delivery Calendar Screen



7. Click  (the OK button) to select the highlighted program.

### Maintain National Warehouse Delivery Calendar Screen



8. Click  (the **Calendar** button) next to the **Calendar Start Date** field to select the date from the calendar.



(Note) You can enter the date directly in the **Calendar Start Date** field.



# Work Instruction Set NW Non-Delivery Dates

## Maintain National Warehouse Delivery Calendar Screen

The screenshot displays the 'Maintain National Warehouse Delivery Calendar' screen. At the top, the USDA logo and 'United States Department of Agriculture' are visible, along with 'Web-Based Supply Chain Management' and 'Welcome KY OrderManager'. The navigation menu includes 'Home', 'Operations', 'Admin', 'Reports', and 'Help'. The main content area is titled 'Maintain National Warehouse Delivery Calendar' and contains a form with the following fields:

- Organization: 00400038 KY Dept. of Agriculture
- Ship-To Location: 005000378 15TH AVENUE FOOD CORP
- Program: CSFP
- Calendar Start Date: 10/23/2012

A yellow 'Go' button is located below the 'Calendar Start Date' field. The browser's status bar at the bottom shows 'Trusted sites' and '100%' zoom.

9. Click **Go** (the **Go** button) to display a calendar that corresponds to the Organization, Ship To Location, Program, and Calendar Start Date listed in your criteria.



# Work Instruction Set NW Non-Delivery Dates

## Maintain National Warehouse Delivery Calendar Screen

USDA United States Department of Agriculture  
Web-Based Supply Chain Management

Welcome KY OrderManager Log Out WBCSM

Home Operations Admin Reports Help

Order Processing

Maintain National Warehouse Delivery Calendar

Selection/Source Delivery Calendar

Organization: 000400030 KY Dept  
Ship-To Location: 0005000370 15TH AV  
Program: CSFP  
Calendar Start Date: 10/23/2012  
Go

Repeat On

Day of Week: Frequency: 01 Start Date: Add

Calendar

Previous Year Next year

Date functions:  
Non-Delivery Dates

October 2012							November 2012							December 2012																																															
M	Tu	We	Th	Fr	Sa	Su	M	Tu	We	Th	Fr	Sa	Su	M	Tu	We	Th	Fr	Sa	Su																																									
01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31

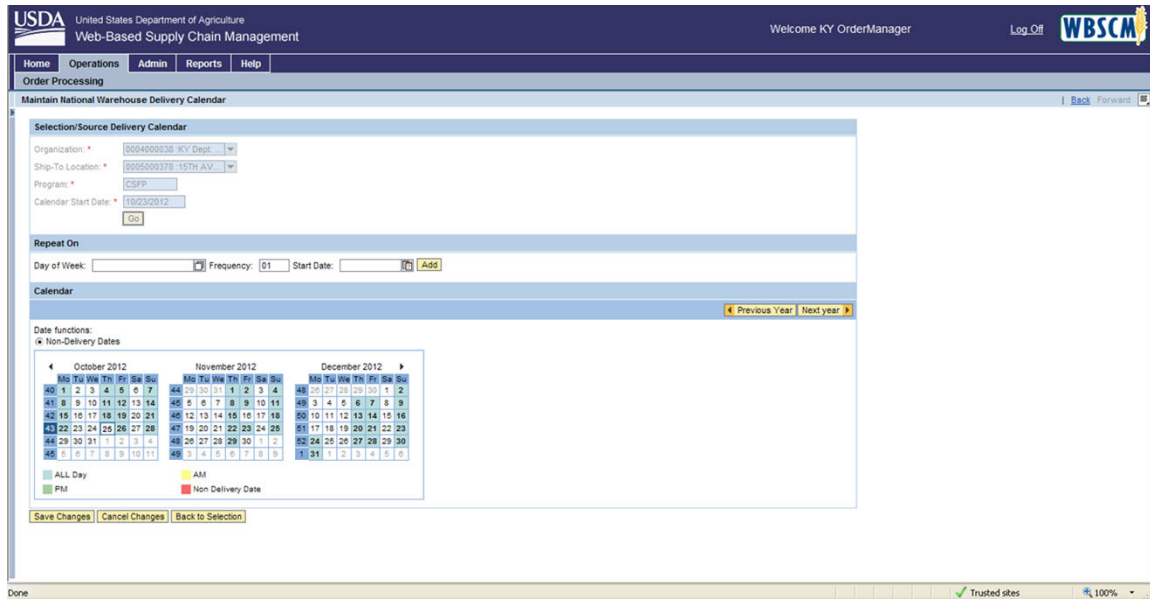
ALL Day AM PM Non Delivery Date


Save Changes Cancel Changes Back to Selection

10. Scroll to the bottom of the screen. You will be able to see the current delivery calendar. Dates when you can receive deliveries at any time during the day are indicated in light blue. Dates when you can receive AM deliveries are indicated in yellow. Dates when you can receive PM deliveries are indicated in green. Non-Delivery Dates are indicated in red.



### Maintain National Warehouse Delivery Calendar Screen

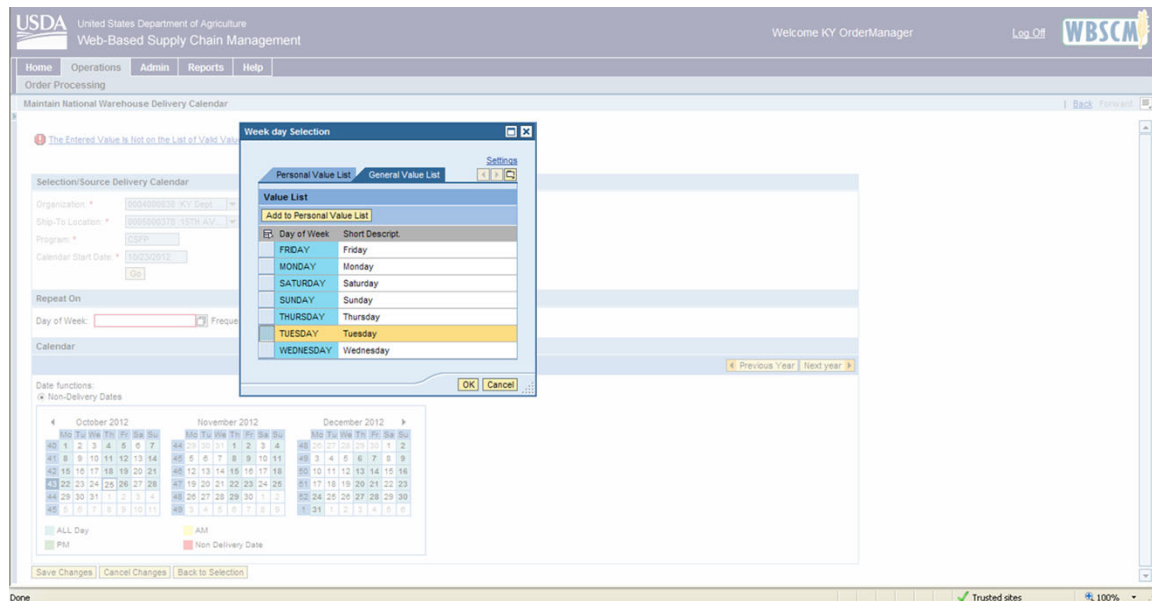



- Click  (the **Matchcode** button) next to the **Day of the Week** field to select a non-delivery day of the week or enter the day directly into the field.

As required, complete/review the following fields:

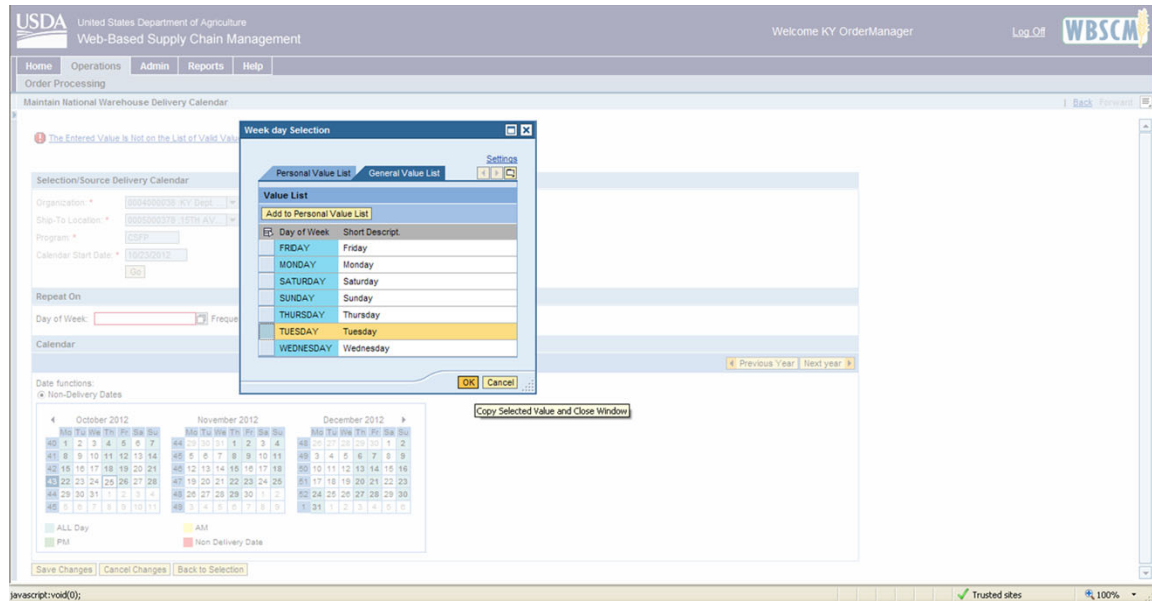
Field	R/O/C	Description
Day of the Week:	R	Day of week when you do not want to receive deliveries. This could be a recurring date (i.e. I do not want to receive deliveries on any Tuesday in the winter) or one-time dates (i.e. I do not want to receive deliveries on Tuesday, the 30th of October).  Example: Tuesday

### Maintain National Warehouse Delivery Calendar Screen



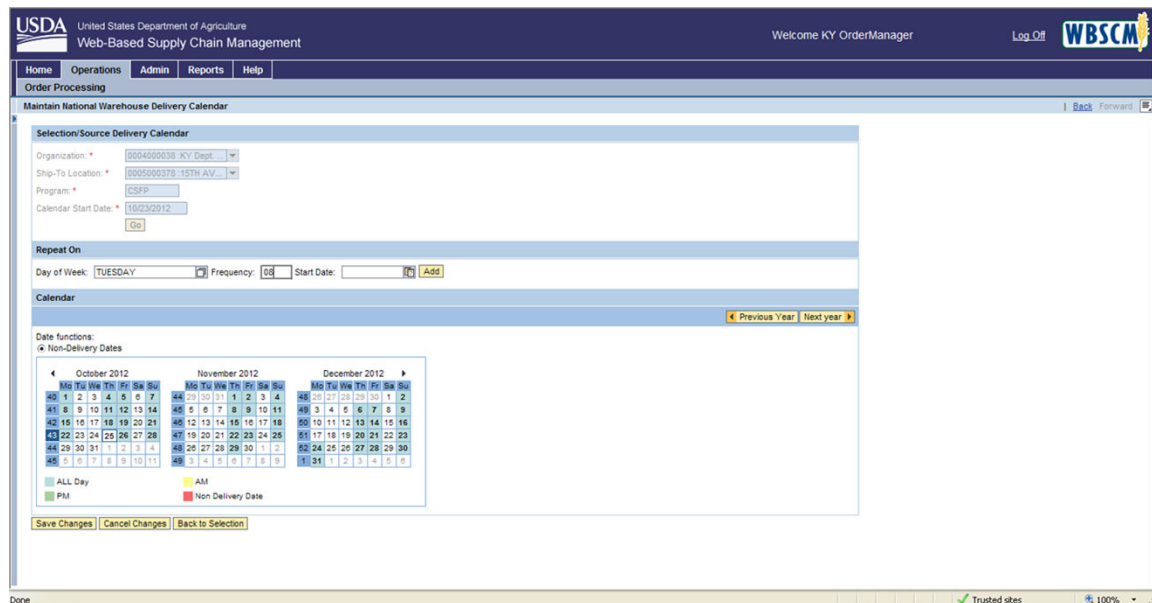
- Click  (the **Blue Box**) next to the appropriate day option. In this case, we selected the **Tuesday** option.


## Maintain National Warehouse Delivery Calendar Screen



- Click **OK** (the **OK** button) to select the highlighted day.

### Maintain National Warehouse Delivery Calendar Screen

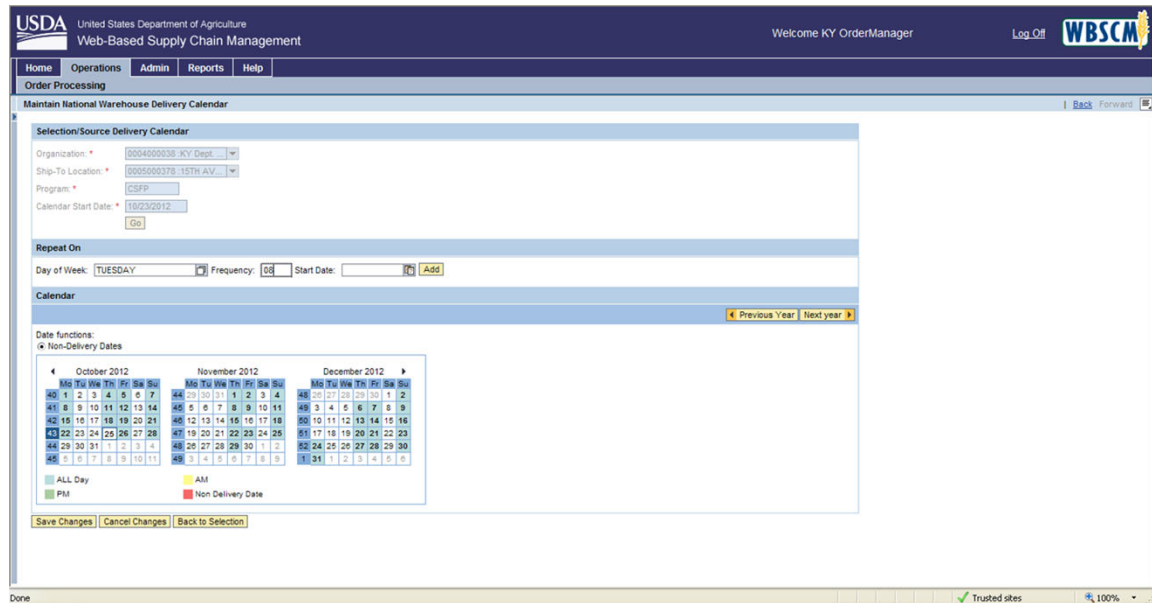


14. Click  (the **Frequency** text box) to enter the frequency. In this case, we entered 08 in the text box.

As required, complete/review the following fields:

Field	R/O/C	Description
Frequency	R	Frequency of Tuesdays when you do not wish to receive deliveries. For example, we entered 8 in this field, which will block off the next 8 Tuesdays, so that we do not receive deliveries on those dates.  Example: 8

### Maintain National Warehouse Delivery Calendar Screen




15. Click  (the **Start Date** text box) to enter the start date or click the calendar icon to select a date from the calendar. In this case, we entered 10/23/12.

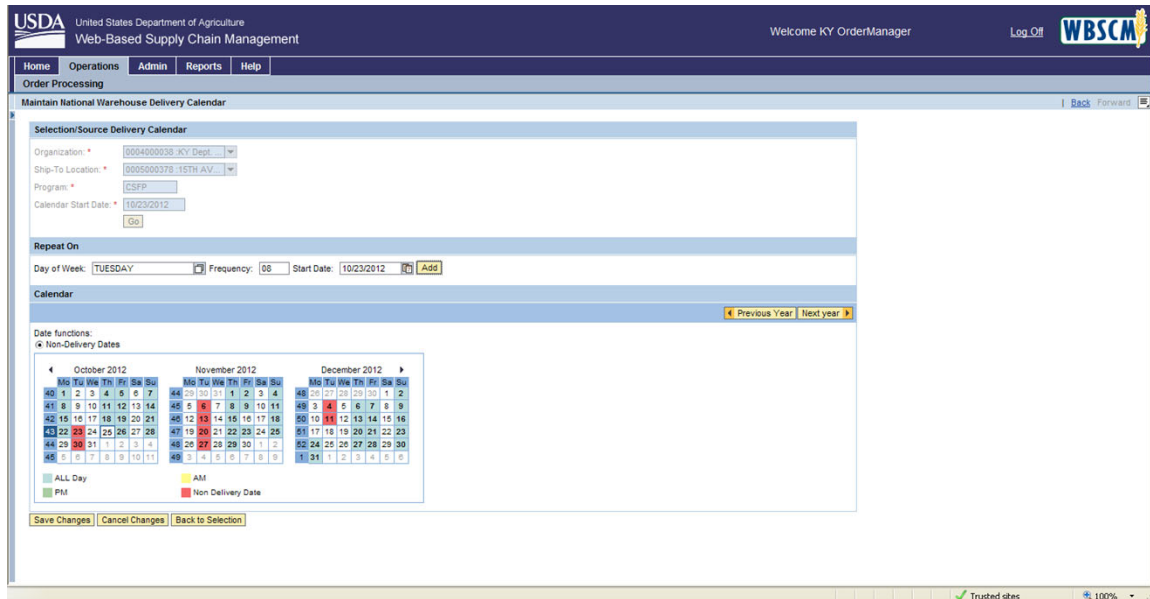
As required, complete/review the following fields:

Field	R/O/C	Description
Start Date	R	Date when the non-delivery dates should start. By entering 10/23/2012 in this field, we have indicated that the eight Tuesdays following 10/23/2012 will be blocked out as non-delivery dates.  Example: 10/23/2012

## Maintain National Warehouse Delivery Calendar Screen

16. Click  (the **Add** button) to add the new non-delivery dates to the calendar.

### Maintain National Warehouse Delivery Calendar Screen



17. After adding any non-delivery dates click **Save Changes** (the **Save Changes** button) to save your changes.



(Note) The non-delivery dates are indicated in red.



# Work Instruction Set NW Non-Delivery Dates

## Maintain National Warehouse Delivery Calendar Screen

USDA United States Department of Agriculture  
Web-Based Supply Chain Management

Welcome KY OrderManager Log Off WBCSM

Home Operations Admin Reports Help

Order Processing

Maintain National Warehouse Delivery Calendar

Changes Saved Successfully

Selection/Source Delivery Calendar

Organization: 000400038\_KY Dept.  
Ship-To Location: 0005000378\_15TH AV.  
Program: GSPF  
Calendar Start Date: 10/23/2012

Repeat On

Day of Week: TUESDAY Frequency: 08 Start Date: 10/23/2012

Calendar

Date functions:  
Non-Delivery Dates

October 2012							November 2012							December 2012						
Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su
30	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4
22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11
44	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
45	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20

Legend: ALL Day (light blue), PM (green), AM (yellow), Non Delivery Date (red)

Save Changes Cancel Changes Back to Selection

18. Confirmation Message Displays.



Maintain National Warehouse Delivery Calendar Screen

19. You can select individual non-delivery dates by clicking the dates directly on the calendar. The day will turn orange to identify that it has been selected. If you select multiple dates on the calendar this way, the previously selected date will change back to its initial status color.

In this case we clicked (the 29th day).



(Note) Refresh the calendar when finished to confirm your changes (Steps 20-23).



# Work Instruction Set NW Non-Delivery Dates

## Maintain National Warehouse Delivery Calendar Screen

USDA United States Department of Agriculture  
Web-Based Supply Chain Management

Welcome KY User Log Off WBSM

Home Operations Admin Reports Help

Order Processing Complaint Administration Recall Administration

Maintain National Warehouse Delivery Calendar

Selection/Source Delivery Calendar

Organization: 0004000038 KY Dept  
Ship-To Location: 0005000378 :15TH AV  
Program: CSFP  
Calendar Start Date: 10/23/2012

Repeat On

Day of Week: Frequency: 01 Start Date: Add

Calendar

Date functions: Non-Delivery Dates

October 2012							November 2012							December 2012						
Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su
30	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10
11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31

Legend: ALL Day, PM, AM, Non-Delivery Date

Save Changes Cancel Changes Back to Selection

20. We clicked **30** (the 30th day) to be non-delivery date. Notice that the **29th** is no longer orange.

Click **Save Changes** (the **Save Changes** link).



# Work Instruction Set NW Non-Delivery Dates

## Maintain National Warehouse Delivery Calendar Screen

USDA United States Department of Agriculture  
Web-Based Supply Chain Management

Welcome KY User Log Off WBSM

Home Operations Admin Reports Help

Order Processing Complaint Administration Recall Administration

Maintain National Warehouse Delivery Calendar

Selection/Source Delivery Calendar

Organization: 0004000038 :KY Dept...  
Ship-To Location: 0005000378 :15TH AV...  
Program: CSFP  
Calendar Start Date: 10/23/2012  
Go

Repeat On

Day of Week: Frequency: 01 Start Date: Add

Calendar

Previous Year Next year

Date functions:  
Non-Delivery Dates

October 2012							November 2012							December 2012									
Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su			
40	1	2	3	4	5	6	7	44	29	30	31	1	2	3	4	43	28	29	30	1	2		
41	8	9	10	11	12	13	14	45	5	6	7	8	9	10	11	48	3	4	5	6	7	8	9
42	15	16	17	18	19	20	21	46	12	13	14	15	16	17	18	49	10	11	12	13	14	15	16
43	22	23	24	25	26	27	28	47	19	20	21	22	23	24	25	51	17	18	19	20	21	22	23
44	29	30	31	1	2	3	4	48	26	27	28	29	30	1	2	52	24	25	26	27	28	29	30
45	5	6	7	8	9	10	11	49	3	4	5	6	7	8	9	53	31	1	2	3	4	5	6

ALL Day AM PM Non-Delivery Date

Save Changes Cancel Changes Back to Selection

21. Click **Back to Selection** (the **Back to Selection** link).




# Work Instruction Set NW Non-Delivery Dates

## Maintain National Warehouse Delivery Calendar Screen

The screenshot displays the 'Maintain National Warehouse Delivery Calendar' screen. The header includes the USDA logo, 'United States Department of Agriculture', 'Web-Based Supply Chain Management', 'Welcome KY User', and a 'Log Off' link. The navigation menu contains 'Home', 'Operations', 'Admin', 'Reports', and 'Help'. Below the navigation, there are links for 'Order Processing', 'Complaint Administration', and 'Recall Administration'. The main content area is titled 'Maintain National Warehouse Delivery Calendar' and contains a form with the following fields:

- Organization: \* 0004000038 :KY Dept. of Agriculture
- Ship-To Location: \* 0005000378 :15TH AVENUE FOOD CORP
- Program: \* CSFP
- Calendar Start Date: \* 10/23/2012

A yellow 'Go' button is located at the bottom of the form.

22. Click  (the **Go** link) to refresh the calendar.

Maintain National Warehouse Delivery Calendar Screen

The screenshot displays the 'Maintain National Warehouse Delivery Calendar' interface. At the top, it shows the USDA logo and 'United States Department of Agriculture Web-Based Supply Chain Management'. The user is identified as 'Welcome KY User'. The main content area is titled 'Maintain National Warehouse Delivery Calendar' and includes a 'Selection/Source Delivery Calendar' form with the following details:

- Organization: 0004000038 :KY Dept
- Ship-To Location: 0005000378 :15TH AV
- Program: CSFP
- Calendar Start Date: 10/23/2012

Below the form is a 'Repeat On' section with 'Day of Week' and 'Frequency: 01' set. The 'Calendar' section features a date picker for 'Non-Delivery Dates' showing a calendar for October, November, and December 2012. The 29th and 30th of November are highlighted in red, indicating they are non-delivery dates. A legend below the calendar identifies the colors: ALL Day (light blue), PM (light green), AM (yellow), and Non Delivery Date (red). At the bottom of the calendar view are buttons for 'Save Changes', 'Cancel Changes', and 'Back to Selection'.

23. Notice that the **29th** and the **30th** are both indicted as non-delivery dates. The **30th** will change from orange to red when the next non-delivery date is selected.

You have completed this transaction.



Use the same process to remove non-delivery dates. (Click the non-delivery date and it will turn orange. Save your changes and refresh the calendar. The date will change to white, which signifies no status.)



Work Instruction  
Set NW Non-Delivery Dates

**RESULT**

The transaction has been successfully completed.



## PROCESS OVERVIEW

### Purpose

A Co-op Organization is an organization that places orders in WBSCM on behalf of member Recipient Agencies (RAs). The purpose of a co-op is to leverage buying power by consolidating orders based on the needs of their RAs and submitting their combined order requests to the SDA for update or approval. Use this transaction to create a new Co-op Organization in WBSCM.

### Process Trigger

A Co-op Organization needs to be entered into WBSCM.

### Prerequisites

- RA(s) that should belong to a Co-op exist in WBSCM.
- Available business partners exist.

### Portal Path

Follow the Portal path below to complete this transaction:

- Select **Admin** tab → **Organization Maintenance** tab → **Maintain Organization** → **Create Co-op Organization** link to go to the *Create Co-op Organization* initial screen.

### Tips and Tricks

- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
  - A Conditional field: an entry that becomes required as a result of entering something previous to it, which then deems it required
  - An Optional field: you may enter information in an optional field, but an entry is not required for the completion of the transaction
- Refer to WBSCM Portal Basic Navigation course for tips on creating favorites, perform searches, etc.

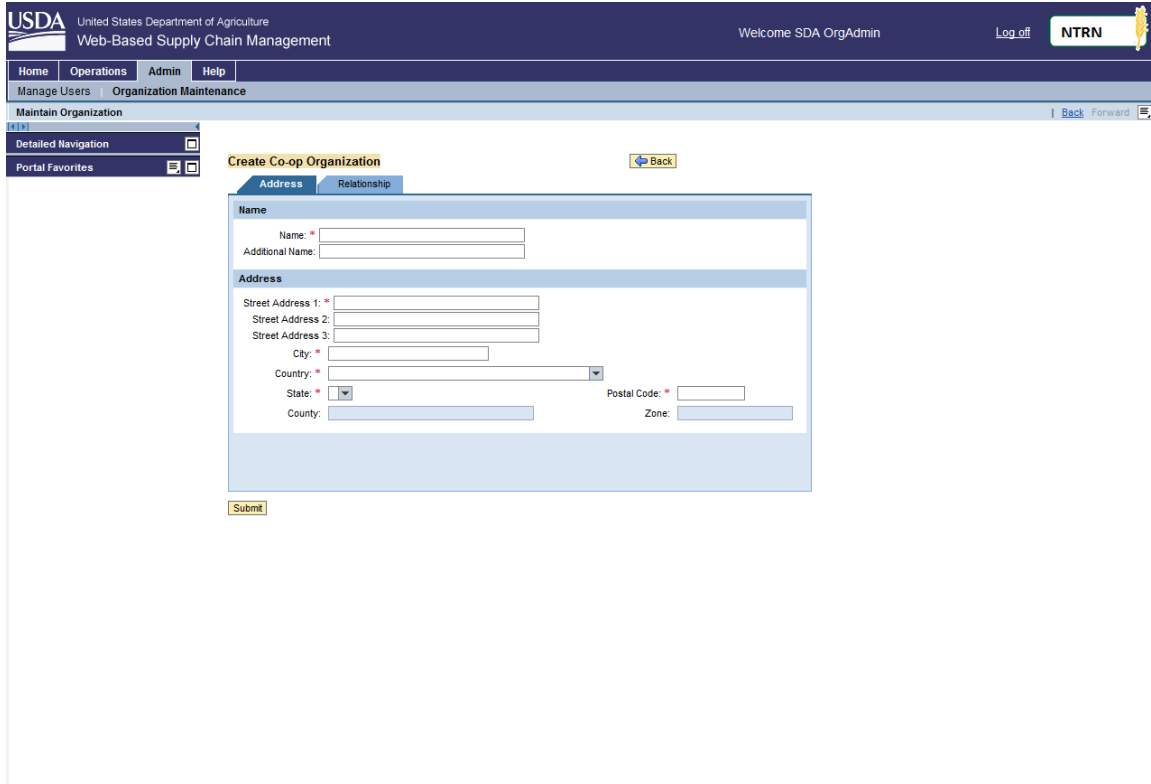
### Reminders

- Remember to check your work.
- Refer to the Help Option (to the right of the screen) in the Portal for further assistance.

**PROCEDURE**

1. Start the transaction using the following Portal path: **Admin tab → Organization Maintenance tab → Maintain Organization → Create Co-op Organization**

**Create Co-op Organization Screen**



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

Field	R/O/C	Description
Name:	R	Person or company's name.  <b>Example:</b> Pueblo City School District 60
Street Address:	R	<b>Example:</b> 1902 Montezuma Road
City:	R	City where the Co-op organization is located.  <b>Example:</b> Pueblo





# Work Instruction Create Co-op Organization

## Create Co-op Organization Screen

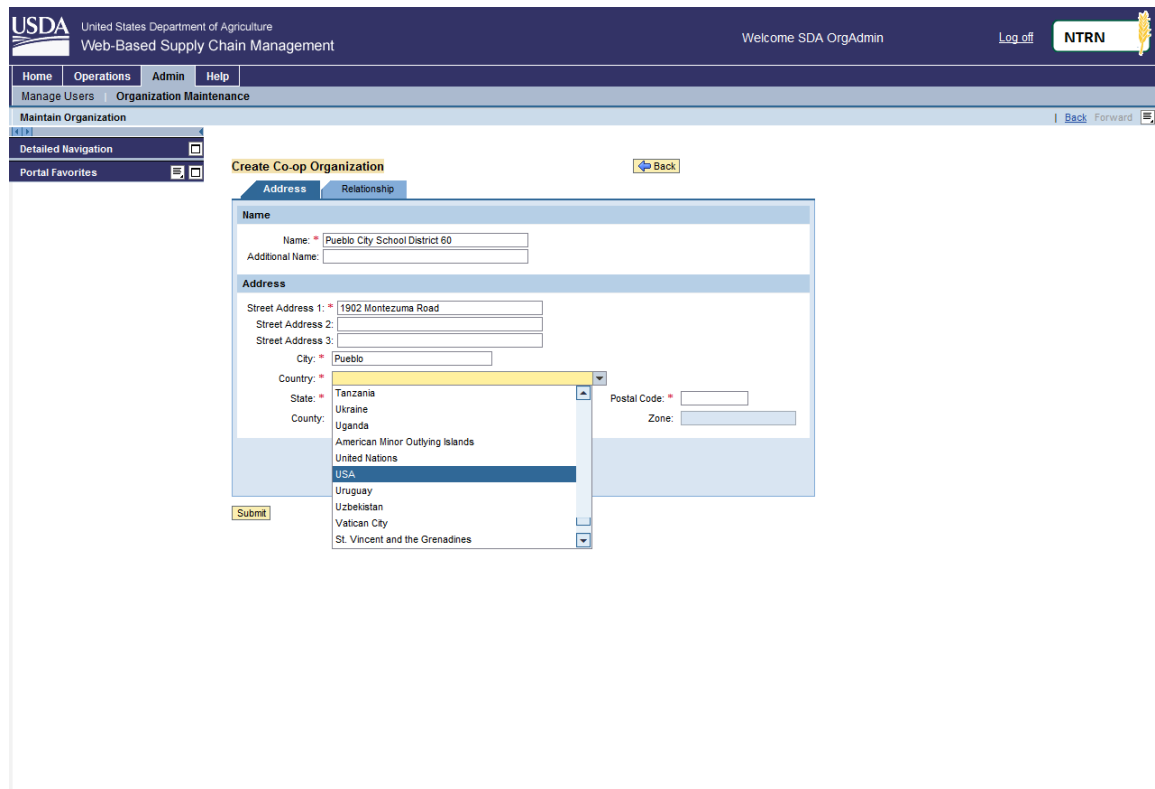
The screenshot displays the 'Create Co-op Organization' screen. The top navigation bar includes the USDA logo, 'United States Department of Agriculture', 'Web-Based Supply Chain Management', 'Welcome SDA OrgAdmin', and a 'Log off' button. Below this is a secondary navigation bar with 'Home', 'Operations', 'Admin', and 'Help'. A third bar shows 'Manage Users' and 'Organization Maintenance'. The main content area has a 'Maintain Organization' section with a 'Back' and 'Forward' link. On the left, there is a 'Detailed Navigation' and 'Portal Favorites' sidebar. The main form is titled 'Create Co-op Organization' and has a 'Back' button. It features two tabs: 'Address' (selected) and 'Relationship'. The 'Address' tab contains the following fields:

- Name: \* Pueblo City School District 60
- Additional Name: \*
- Street Address 1: \* 1902 Montezuma Road
- Street Address 2: \*
- Street Address 3: \*
- City: \* Pueblo
- Country: \* (dropdown menu)
- State: \*
- Postal Code: \*
- County: \*
- Zone: \*

A 'Submit' button is located at the bottom left of the form.

3. In the Country field, click on the  (the **Dropdown** button) to select the country in which the new Co-op Organization is located.

## Create Co-op Organization Screen



The screenshot displays the 'Create Co-op Organization' screen within the USDA Web-Based Supply Chain Management system. The page header includes the USDA logo, 'United States Department of Agriculture', 'Web-Based Supply Chain Management', 'Welcome SDA OrgAdmin', and a 'Log off' button. The navigation menu shows 'Home', 'Operations', 'Admin', and 'Help', with 'Organization Maintenance' selected. The main content area is titled 'Create Co-op Organization' and has two tabs: 'Address' (selected) and 'Relationship'. A 'Back' button is located to the right of the tabs. The form contains the following fields:

- Name:** Name: \* Pueblo City School District 60; Additional Name: (empty)
- Address:** Street Address 1: \* 1902 Montezuma Road; Street Address 2: (empty); Street Address 3: (empty); City: \* Pueblo; Country: \* (dropdown menu open showing options: Tanzania, Ukraine, Uganda, American Minor Outlying Islands, United Nations, USA, Uruguay, Uzbekistan, Vatican City, St. Vincent and the Grenadines); Postal Code: \* (empty); Zone: (empty)

A 'Submit' button is located at the bottom left of the form.

4. From the Dropdown list, select **USA** (the **USA** option) to establish this as the new Co-op Organization's country.



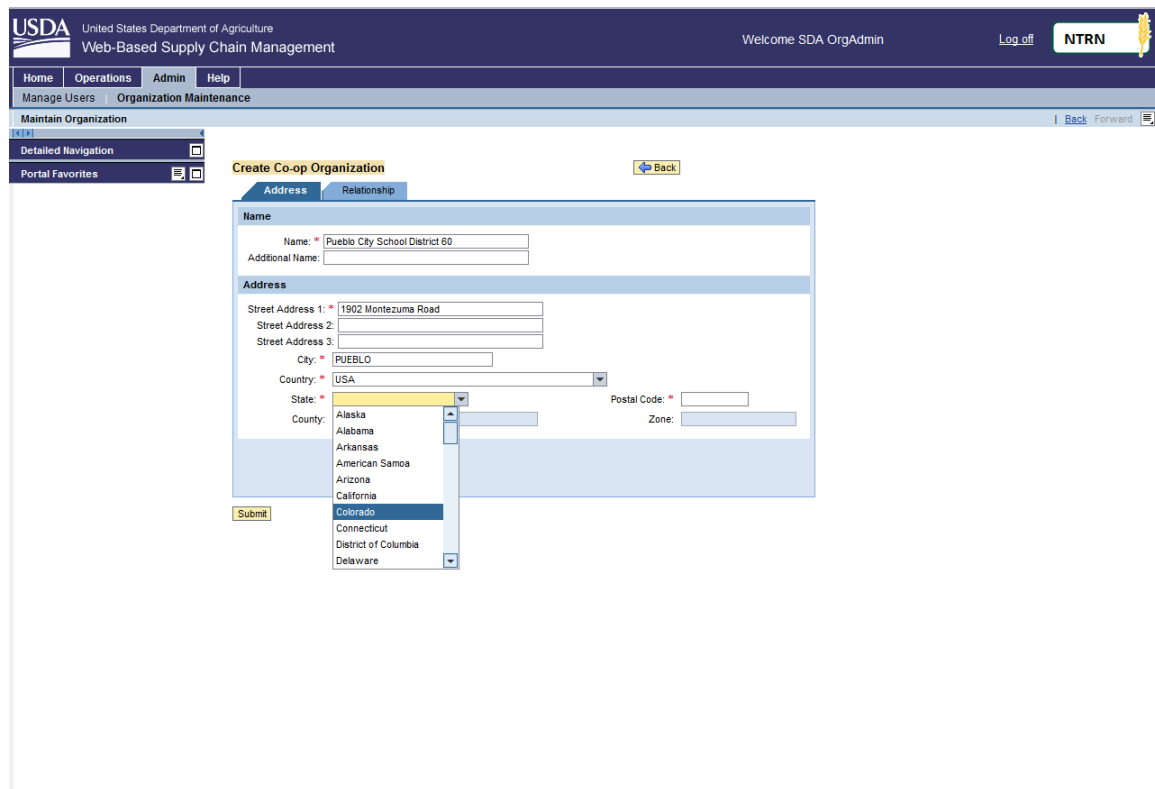
# Work Instruction Create Co-op Organization

## Create Co-op Organization Screen

The screenshot displays the 'Create Co-op Organization' screen within the USDA Web-Based Supply Chain Management system. The interface includes a top navigation bar with 'Home', 'Operations', 'Admin', and 'Help' menus. Below this, there are sub-menus for 'Manage Users' and 'Organization Maintenance'. The main content area is titled 'Create Co-op Organization' and features two tabs: 'Address' and 'Relationship'. The 'Address' tab is currently selected, showing a form with the following fields: 'Name' (filled with 'Pueblo City School District 60'), 'Additional Name', 'Street Address 1' (filled with '1902 Montezuma Road'), 'Street Address 2', 'Street Address 3', 'City' (filled with 'PUEBLO'), 'Country' (filled with 'USA'), 'State' (a dropdown menu), 'Postal Code', and 'Zone'. A 'Submit' button is located at the bottom of the form.

5. In the State field, click on the  (the **Dropdown** button) to select the state in which the new Co-op Organization is located.

## Create Co-op Organization Screen



The screenshot displays the 'Create Co-op Organization' screen within the USDA Web-Based Supply Chain Management system. The page header includes the USDA logo, 'United States Department of Agriculture', and 'Web-Based Supply Chain Management'. The user is logged in as 'SDA OrgAdmin' and has a 'Log off' button and 'NTRN' indicator. The navigation menu shows 'Home', 'Operations', 'Admin', and 'Help'. The 'Admin' menu is expanded to show 'Manage Users' and 'Organization Maintenance'. The 'Organization Maintenance' menu is further expanded to show 'Maintain Organization'. The 'Create Co-op Organization' form is the main focus, with a 'Back' button. The form has two tabs: 'Address' (selected) and 'Relationship'. The 'Name' section has 'Name' (Pueblo City School District 60) and 'Additional Name' fields. The 'Address' section has 'Street Address 1' (1902 Montezuma Road), 'Street Address 2', 'Street Address 3', 'City' (PUEBLO), 'Country' (USA), 'State' (Colorado), and 'Postal Code' fields. A 'Submit' button is located at the bottom left of the form.

- From the Dropdown list, select **Colorado** (the **Colorado** option) to establish this as the new Co-op Organization's state.



# Work Instruction Create Co-op Organization

## Create Co-op Organization Screen

The screenshot displays the 'Create Co-op Organization' form in the USDA Web-Based Supply Chain Management system. The form is divided into two tabs: 'Address' and 'Relationship'. The 'Address' tab is currently selected. The form fields are as follows:

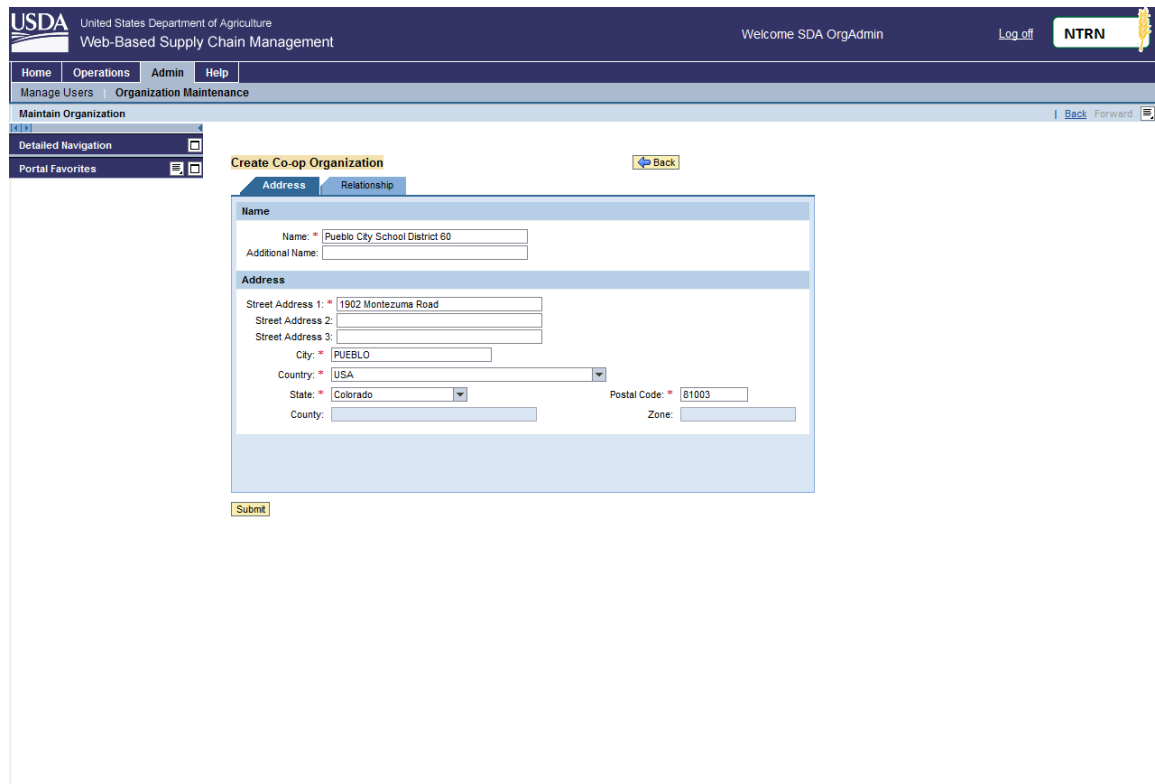
- Name:** Pueblo City School District 60
- Additional Name:** (empty)
- Address:** 1902 Montezuma Road
- Street Address 2:** (empty)
- Street Address 3:** (empty)
- City:** PUEBLO
- Country:** USA
- State:** Colorado
- Postal Code:** (empty)
- County:** (empty)
- Zone:** (empty)

A 'Submit' button is located at the bottom left of the form area.

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

Field	R/O/C	Description
Postal code:	R	A postal code.  <b>Example:</b> 81003

## Create Co-op Organization Screen



The screenshot displays the 'Create Co-op Organization' screen in the USDA Web-Based Supply Chain Management system. The page header includes the USDA logo, 'United States Department of Agriculture', 'Web-Based Supply Chain Management', 'Welcome SDA OrgAdmin', and a 'Log off' button. The navigation menu on the left includes 'Home', 'Operations', 'Admin', and 'Help', with 'Organization Maintenance' selected. The main form area has two tabs: 'Address' (selected) and 'Relationship'. The 'Address' tab contains the following fields:


- Name:** Name: Pueblo City School District 60, Additional Name: (empty)
- Address:** Street Address 1: 1902 Montezuma Road, Street Address 2: (empty), Street Address 3: (empty), City: PUEBLO, Country: USA, State: Colorado, Postal Code: 81003, County: (empty), Zone: (empty)

A 'Submit' button is located at the bottom of the form area.

8. Click **Relationship** (the **Relationship** tab) to assign Business Partner relationships to the new Co-op Organization.

## Create Co-op Organization Screen

The screenshot displays the 'Create Co-op Organization' screen within the USDA Web-Based Supply Chain Management system. The page header includes the USDA logo, 'United States Department of Agriculture', and 'Web-Based Supply Chain Management'. The user is logged in as 'SDA OrgAdmin'. The main navigation menu includes 'Home', 'Operations', 'Admin', and 'Help'. The current page is 'Organization Maintenance', with sub-menus for 'Manage Users' and 'Organization Maintenance'. The 'Maintain Organization' section is active, showing a 'Detailed Navigation' pane and 'Portal Favorites'. The main content area is titled 'Create Co-op Organization' and has two tabs: 'Address' and 'Relationship'. The 'Relationship' tab is selected, showing a 'Business Partner Relation' dropdown set to 'Has RAs' and a 'Name Filter' field. Below this, there are two lists: 'Assigned Business Partners - Name / City State (BP #)' and 'Available Business Partners - Name / City State (BP #)'. The 'Available Business Partners' list includes several entries, with the first one, 'ALBERT GALLATIN AREA SCHOOL DISTRICT / UNIONTOWN PA (4000681)', highlighted with a blue box. There are 'Assign' and 'Unassign' buttons between the lists, and a 'Submit' button at the bottom.

- Click  (the **Blue Box**) to the left of the Albert Gallatin Area School District/Uniontown PA to select it for assignment as an RA for the new Co-op Organization.



**(Note)** Using the Business Partner Relation drop-down, you can determine the type of Business Partner relationship you establish. Note that Co-ops only have one Business Partner Relation to choose from, which is "Has RAs".

## Create Co-op Organization Screen

10. Click **Assign** (the **Assign** button) to assign the selected RA to the new Co-op Organization.





# Work Instruction Create Co-op Organization

## Create Co-op Organization Screen

USDA United States Department of Agriculture  
Web-Based Supply Chain Management

Welcome SDA OrgAdmin Log off NTRN

Home Operations Admin Help

Manage Users Organization Maintenance

Maintain Organization Back Forward

Detailed Navigation

Portal Favorites

Create Co-op Organization Back

Address Relationship

Business Partner Relation: Has RAs Name Filter: Apply Filter

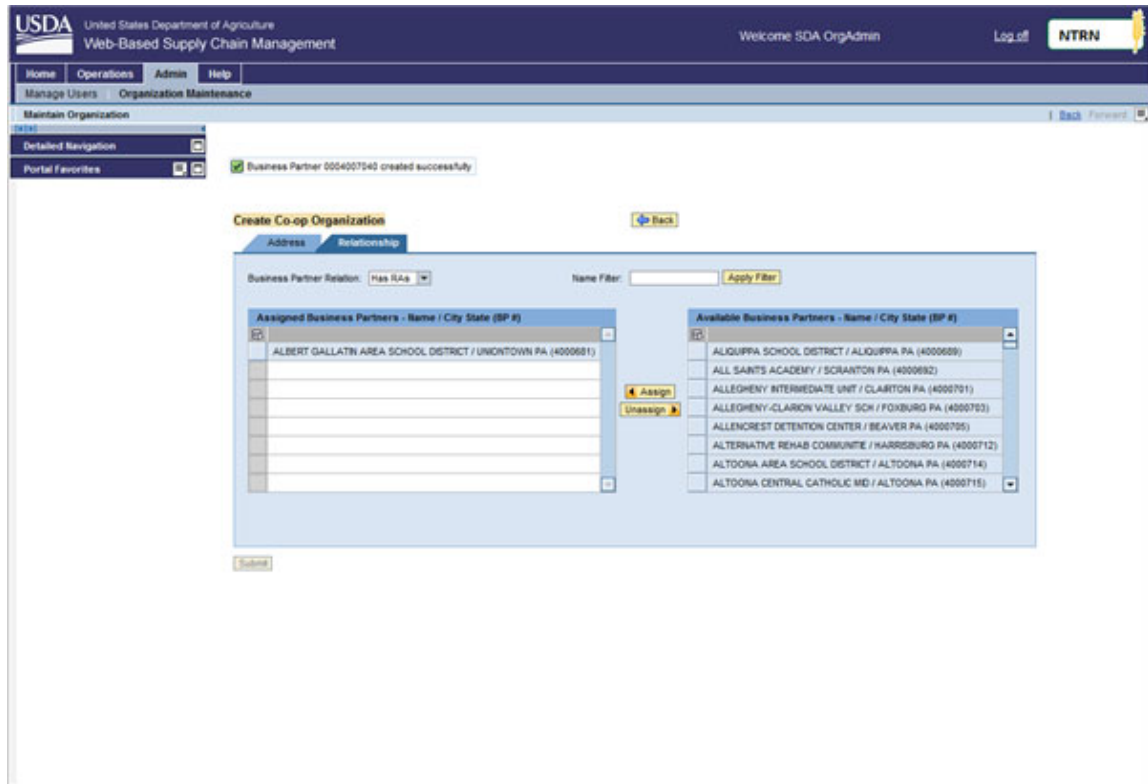
Assigned Business Partners - Name / City State (BP #)	Available Business Partners - Name / City State (BP #)
ALBERT GALLATIN AREA SCHOOL DISTRICT / UNIDTOWN PA (4000681)	ALTIQUIPPA SCHOOL DISTRICT / ALTIQUIPPA PA (4000689)
	ALL SAINTS ACADEMY / SCRANTON PA (4000692)
	ALLEGHENY INTERMEDIATE UNIT / CLARTON PA (4000701)
	ALLEGHENY-CLARION VALLEY SCH / FOXBURG PA (4000703)
	ALLENCREST DETENTION CENTER / BEAVER PA (4000705)
	ALTERNATIVE REHAB COMMUNITIE / HARRISBURG PA (4000712)
	ALTOONA AREA SCHOOL DISTRICT / ALTOONA PA (4000714)
	ALTOONA CENTRAL CATHOLIC MD / ALTOONA PA (4000715)

Assign Unassign

Submit

11. Click **Submit** (the **Submit** button) to submit the information and save this new Co-op Organization to the WBSCM system.

### Create Co-op Organization Screen



12. You have completed this transaction.



**(Note)** An information message appears, explaining that the new Co-op Organization was created successfully.



Work Instruction  
Create Co-op Organization

**RESULT**

You have have created a new Co-op Organization in the WBSCM system.



## PROCESS OVERVIEW

### Purpose

A Co-op Organization is an organization that places orders in WBSCM on behalf of member Recipient Agencies (RAs). The purpose of a co-op is to leverage buying power by consolidating orders based on the needs of their RAs. Use this transaction to modify a pre-existing Co-op Organization in WBSCM.

### Process Trigger

A Co-op Organization already exists in the WBSCM system but its information needs to be altered. Use this transaction to do so.

### Prerequisites

- A Co-op Organization must exist in the WBSCM system before its information can be altered.

### Portal Path

Follow the Portal path below to complete this transaction:

- Select **Admin** tab → **Organization Maintenance** tab → **Maintain Organization** → **Update Co-op Organization** link to go to the *Update Co-op Organization* initial screen.

### Tips and Tricks

- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
  - A Conditional field: an entry that becomes required as a result of entering something previous to it, which then deems it required
  - An Optional field: you may enter information in an optional field, but an entry is not required for the completion of the transaction
- Refer to WBSCM Portal Basic Navigation course for tips on creating favorites, perform searches, etc.

### Reminders

- Remember to check your work
- Refer to the Help Option (to the right of the screen) in the Portal for further assistance.



## PROCEDURE

1. Start the transaction using the following Portal path: **Admin tab → Organization Maintenance tab → Maintain Organization → Update Co-op Organization**

### Update Co-op Organization Screen

The screenshot displays the 'Maintain Organization' screen in the WBSM portal. The page header includes the USDA logo, 'United States Department of Agriculture', 'Web-Based Supply Chain Management', and a user greeting 'Welcome Mr. SDA User - 2'. The navigation menu shows 'Home', 'Operations', 'Admin', and 'Help'. The 'Admin' tab is active, and the 'Organization Maintenance' sub-tab is selected. The main content area is titled 'Maintain Organization' and features a 'Select Sub-Organization' section with a dropdown menu. The dropdown is currently set to 'PUEBLO CITY SCHOOL DIST 6 / PUEBLO CO (8010332)'. A 'Submit' button is located below the dropdown. The browser status bar at the bottom shows 'Done' and 'Internet'.

2. In the **COP** field, click on the **Dropdown** button to select the Co-op Organization you wish to modify.



# Work Instruction Modify Co-op Organization

## Update Co-op Organization Screen

USDA United States Department of Agriculture  
Web-Based Supply Chain Management

Welcome Mr. SDA User - 2 Log Off

Home Operations Admin Help

Manage Users | Organization Maintenance | WBSCM procurement

Maintain Organization Back Forward

Detailed Navigation

- Maintain Organization
- Upload New RA Organizations
- Upload RA Updates

Portal Favorites

Select Sub-Organization

COP: PUEBLO CITY SCHOOL DIST 6 / PUEBLO CO (8010332)  
PUEBLO CITY SCHOOL DIST 6 / PUEBLO CO (8010332)  
PUEBLO CITY SCHOOL DISTRI / PUEBLO CO (8010684)  
WI - DEPT HEALTH & FAMILY / ARLINGTON VA (8010263)

Submit

Done Internet

- From the Dropdown list, select **PUEBLO CITY SCHOOL DISTRI / PUEBLO CO (8010684)** (the **Pueblo City School District Co-op Organization** option).



### Update Co-op Organization Screen

4. Click **Submit** (the **Submit** button) to display the information for this Co-op Organization.



# Work Instruction Modify Co-op Organization

## Update Co-op Organization Screen

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

Field	R/O/C	Description
Name	R	Person's or company's name.  <b>Example:</b> Pueblo City School District 70
Street Address 1	R	A named traffic area together with surrounding development.  <b>Example:</b> 1902 Montezuma Street
Postal Code	R	A zip code.  <b>Example:</b> 81005





# Work Instruction Modify Co-op Organization

Field	R/O/C	Description
City	R	City where the company is located.  <b>Example:</b> Pueblo

## Update Co-op Organization Screen

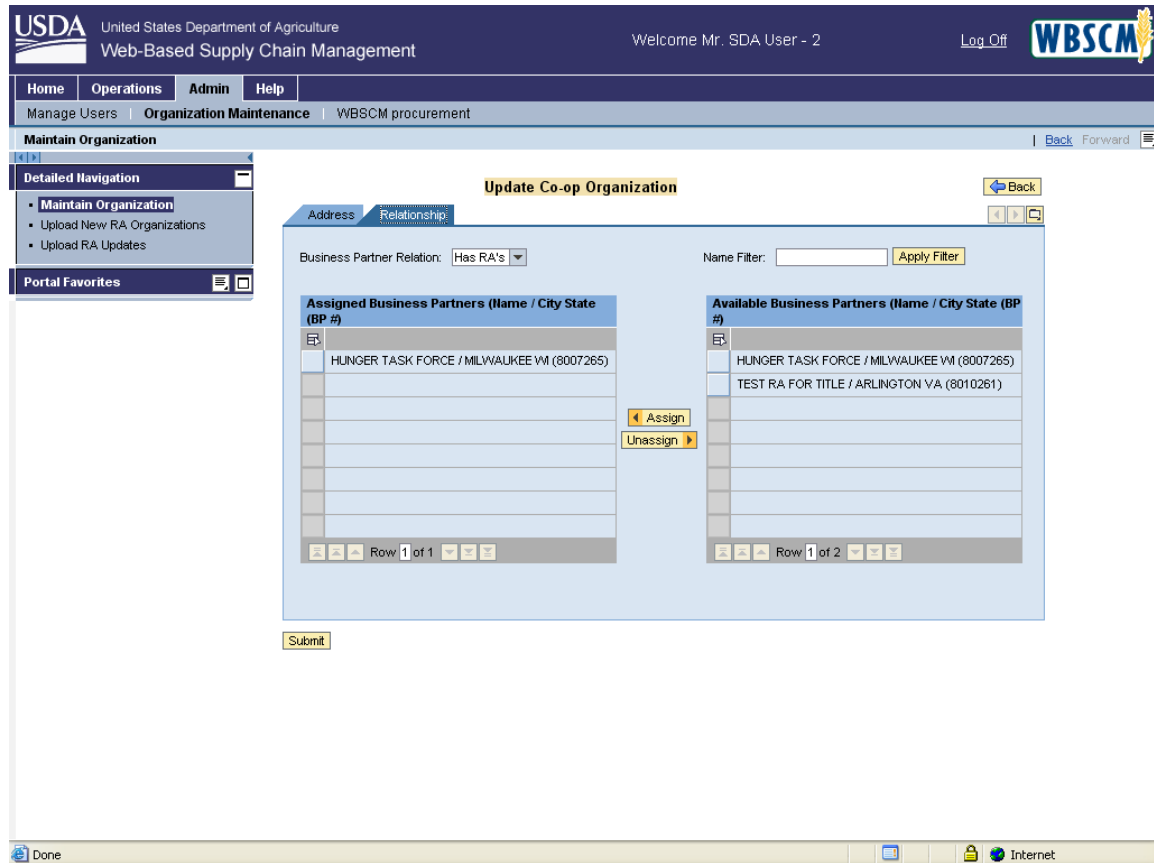
The screenshot displays the 'Update Co-op Organization' screen. The interface includes a top navigation bar with 'Home', 'Operations', 'Admin', and 'Help' tabs. Below this is a breadcrumb trail: 'Manage Users | Organization Maintenance | WBSCM procurement'. The left sidebar contains a 'Detailed Navigation' menu with 'Maintain Organization' selected, and a 'Portal Favorites' section. The main content area features two tabs: 'Address' (active) and 'Relationship'. The 'Address' tab contains the following form fields:

- Name:** \* Pueblo City School District 70
- Additional Name:** (empty)
- Address:**
  - Street Address 1: \* 1902 Montezuma Street
  - Street Address 2: (empty)
  - Street Address 3: (empty)
- City:** \* PUEBLO
- Country:** \* USA (dropdown)
- State:** \* Colorado (dropdown)
- Postal Code:** \* 81005
- County:** (empty)
- Zone:** (empty)

A 'Submit' button is located at the bottom of the form. The browser's address bar shows 'Done' and the system tray includes 'Internet'.

6. Click **Relationship** (the **Relationship** tab) to change the business partner assignments for this Co-op Organization.

### Update Co-op Organization Screen



7. Select **Hunger Task Force** under **Assigned Business Partners** to select it for unassignment from the Co-op Organization.



(Note) Use the Business Partner Relation drop-down to determine the business partner relationships you establish on the Relationship screen.

Note, that "Has RAs" is the only Business Partner Relation in the drop down.

## Update Co-op Organization Screen

The screenshot displays the 'Update Co-op Organization' interface. At the top, the USDA logo and 'United States Department of Agriculture' are visible, along with the user name 'Welcome Mr. SDA User - 2' and a 'Log Off' link. The navigation menu includes 'Home', 'Operations', 'Admin', and 'Help'. The current page is 'Organization Maintenance' under 'WBSCM procurement'. The main content area is titled 'Update Co-op Organization' and features a 'Business Partner Relation' dropdown set to 'Has RA's' and a 'Name Filter' input field with an 'Apply Filter' button. Below this are two tables: 'Assigned Business Partners (Name / City State (BP #))' and 'Available Business Partners (Name / City State (BP #))'. The 'Assigned' table contains one entry: 'HUNGER TASK FORCE / MILWAUKEE WI (8007265)'. The 'Available' table contains two entries: 'HUNGER TASK FORCE / MILWAUKEE WI (8007265)' and 'TEST RA FOR TITLE / ARLINGTON VA (8010261)'. Between the tables are 'Assign' and 'Unassign' buttons. A 'Submit' button is located at the bottom of the main content area. The browser's address bar shows 'javascript:void(0);' and the Internet Explorer logo is visible.

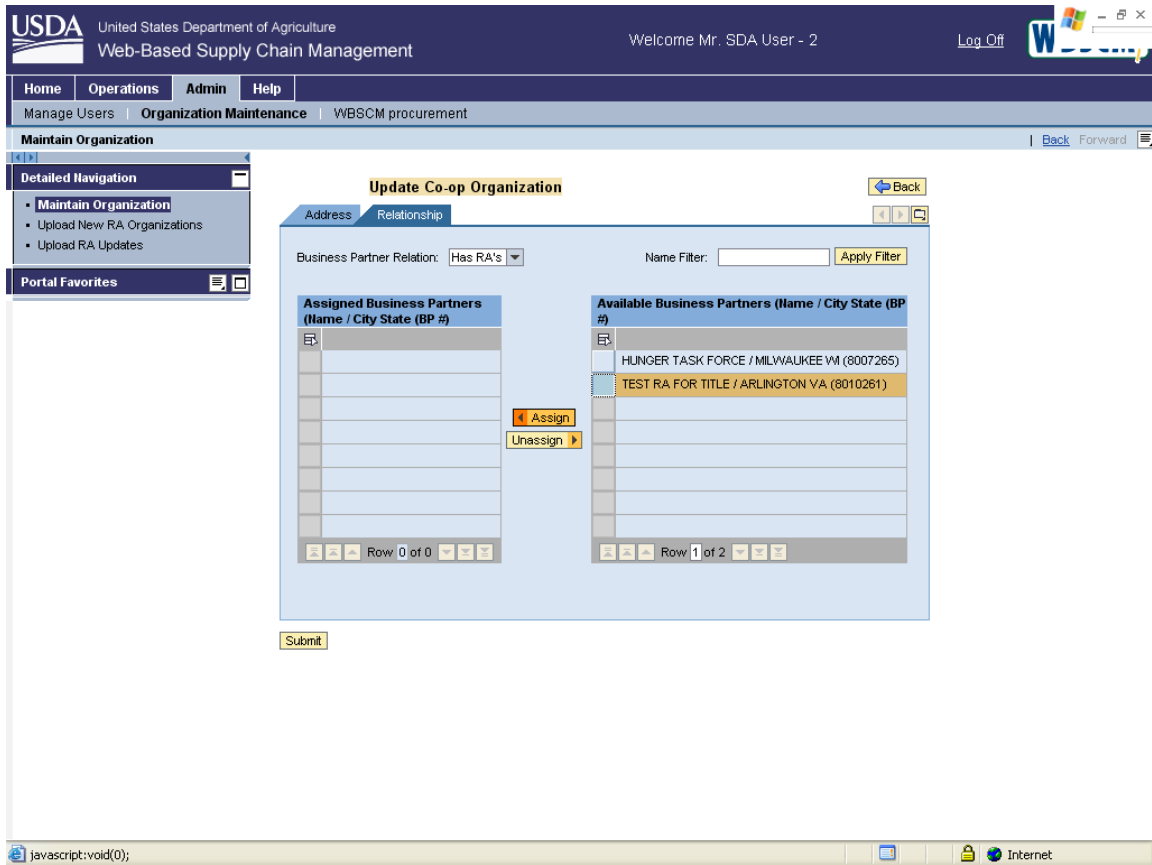
8. Click **Unassign** (the **Unassign** button) to unassign the selected RA from the Co-op Organization.

## Update Co-op Organization Screen

The screenshot displays the 'Update Co-op Organization' screen. The top navigation bar includes 'Home', 'Operations', 'Admin', and 'Help'. The 'Admin' menu is expanded to show 'Manage Users', 'Organization Maintenance', and 'WBSCM procurement'. The 'Organization Maintenance' menu is further expanded to show 'Maintain Organization', 'Upload New RA Organizations', and 'Upload RA Updates'. The main content area is titled 'Update Co-op Organization' and features a 'Business Partner Relation' dropdown set to 'Has RA's' and a 'Name Filter' field. Below this are two tables: 'Assigned Business Partners' (currently empty) and 'Available Business Partners' (containing two entries). An 'Assign' button is located between the tables, and an 'Unassign' button is below it. A 'Submit' button is at the bottom of the main content area.

9. Select **Test RA For Title** under **Available Business Partners** to select it for assignment to the Co-op Organization.

### Update Co-op Organization Screen



10. Click **Assign** (the **Assign** button) to assign the selected RA to the Co-op Organization.

### Update Co-op Organization Screen

The screenshot displays the 'Update Co-op Organization' interface. At the top, the USDA logo and 'Web-Based Supply Chain Management' are visible, along with a user greeting 'Welcome Mr. SDA User - 2' and a 'Log Off' link. The navigation menu includes 'Home', 'Operations', 'Admin', and 'Help', with 'Organization Maintenance' selected. The main content area has tabs for 'Address' and 'Relationship'. Below the tabs, there are fields for 'Business Partner Relation' (set to 'Has RA's') and a 'Name Filter' with an 'Apply Filter' button. Two tables are shown: 'Assigned Business Partners' and 'Available Business Partners'. The 'Assigned' table contains one entry: 'TEST RA FOR TITLE / ARLINGTON VA (8010261)'. The 'Available' table contains two entries: 'HUNGER TASK FORCE / MILWAUKEE WI (8007265)' and 'TEST RA FOR TITLE / ARLINGTON VA (8010261)'. Between the tables are 'Assign' and 'Unassign' buttons. A 'Submit' button is located at the bottom of the main content area.

11. Click **Submit** (the **Submit** button) to save the changes you have made to the Co-op Organization.

## Update Co-op Organization Screen

USDA United States Department of Agriculture  
Web-Based Supply Chain Management

Welcome Mr. SDA User - 2 Log Off

Home Operations Admin Help

Manage Users | Organization Maintenance | WBCSM procurement

Maintain Organization

Detailed Navigation

- Maintain Organization
- Upload New RA Organizations
- Upload RA Updates

Portal Favorites

Business Partner 0008010684 updated successfully

### Update Co-op Organization

Business Partner Relation: Has RA's Name Filter: Apply Filter

Assigned Business Partners (Name / City State (BP #))	
<input type="checkbox"/>	TEST RA FOR TITLE / ARLINGTON VA (8010261)
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

Assign Unassign

Available Business Partners (Name / City State (BP #))	
<input type="checkbox"/>	HUNGER TASK FORCE / MILWAUKEE WI (8007265)
<input checked="" type="checkbox"/>	TEST RA FOR TITLE / ARLINGTON VA (8010261)
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

Submit

https://wbscmdevweb1.usda.gov/irj/portal#

12. You have completed this transaction.



(Note) An information message appears, indicating that the Co-op Organization has been updated successfully.



Work Instruction  
Modify Co-op Organization

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**RESULT**

You have updated the information for the Co-op Organization.